

Mosaic Webform set up instructions

We are in the process of transferring this document to Mosaic's online documentation pages. In the meantime, please use this guide to get started quickly with Webforms.

Requesting Webforms functionality for your site

Webform functionality is not available to Mosaic sites by default. To use *Webforms* on your site, the following needs to be done:

1. A Google Recaptcha needs to be setup for the site (follow the steps in the '[Setup Google Recaptcha](#)' section of the documentation)
2. The Recaptcha's Site key and Secret key need to be input on the *Site Settings > Form spam protection* tab (follow the steps in the '[Setup Google Recaptcha](#)' section of the documentation)
3. the Site Owner or Site Administrator needs to request the Webform functionality from the 'Request a change to a Mosaic site' section of the Contact form on the Mosaic website: <https://oxfordmosaic.web.ox.ac.uk/contact>

Form Builder user role:

Now that the Webform functionality is enabled on your site, you will notice a new '**Form Builder**' user role available (*Site Settings > Users > 'Add' new user/Edit current user*).

In order for a user to create or edit a webform, they must be given the Form Builder role.

Webforms tab in Manage Content:

Once the Form Builder role is associated with a user, a Webforms tab will be visible in Manage Content. New webforms can be created in this tab. Once forms have been created they will be listed in this tab - here you'll be able to view and analyse submissions and download them, and you'll be able to edit the forms from this tab.

New webform edit mode:

Once you have created a new webform and given it a title, you will be taken to the edit mode. There are four main sections on this page. Once you begin to add content to the form, each of these sections provides a lot of configurable options that might take a while to investigate.

The main sections are:

Form components:

Add and edit form components (e.g. textfields, checkboxes, etc.) here.

Conditionals:

Add conditional logic to the webform (e.g. when the answer to question X is Y, reveal a text area for the user to provide a comment).

E-mails:

Configure the email address that submissions are sent to. You can also customise the layout of the email template that is sent from the website to the associated email address.

Form settings:

Configure display, access and submission settings.

Creating a basic webform

To create something like this, follow the steps below:

Add me to your mailing list!

First / given name *

Surname / family name *

My email address is *

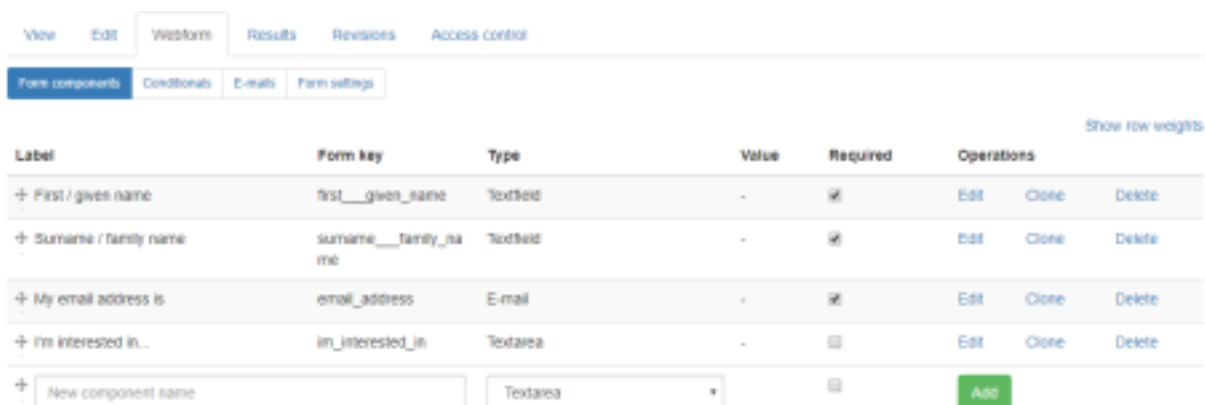
I'm interested in...

Add me to the mailing list!

- Go to *Manage Content* > *Webforms* tab
- Create a new webform
- Give it a title, then Save
- Go to the *Webform* tab

Building the form

- On the *Form components* screen (below):
 - create a form component (field for the user to input information) by inputting a new component name
 - specify which type of field it should be (using the 'Type' dropdown list)
 - choose whether it is a required field using the 'Required' checkbox
 - click 'Add'



The screenshot shows a web form configuration interface. At the top, there are tabs for 'View', 'Edit', 'Webform', 'Results', 'Revisions', and 'Access control'. Below these are sub-tabs for 'Form components', 'Conditionals', 'E-mails', and 'Form settings'. The main area displays a table of form components with the following columns: Label, Form key, Type, Value, Required, and Operations. The table contains four rows of existing components and one row for a new component being added.

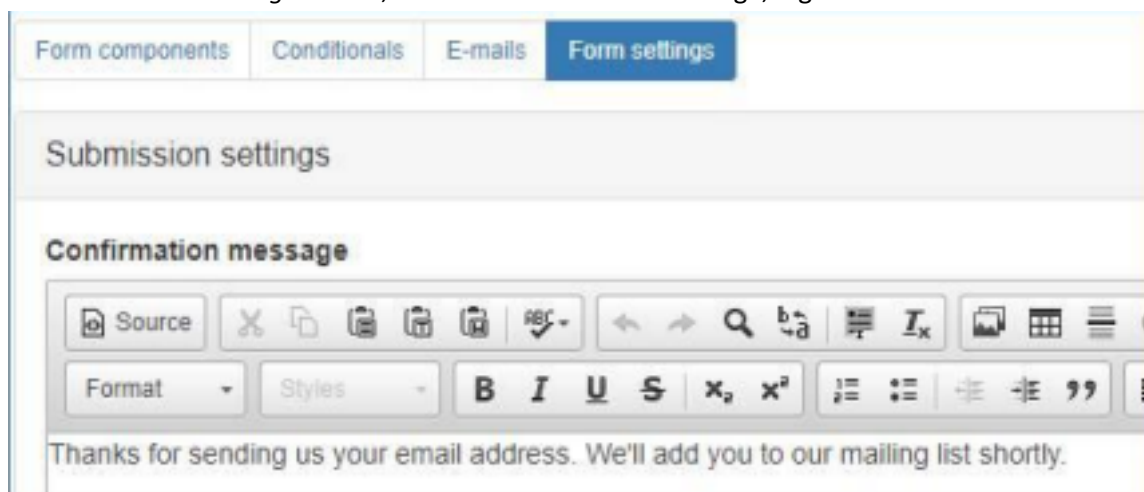
Label	Form key	Type	Value	Required	Operations
+ First / given name	first__given_name	Textfield	-	<input checked="" type="checkbox"/>	Edit Clone Delete
+ Surname / family name	surname__family_name	Textfield	-	<input checked="" type="checkbox"/>	Edit Clone Delete
+ My email address is	email_address	E-mail	-	<input checked="" type="checkbox"/>	Edit Clone Delete
+ I'm interested in...	im_interested_in	Textarea	-	<input type="checkbox"/>	Edit Clone Delete
+ New component name		Textarea		<input type="checkbox"/>	Add

On the next screen (the form component configuration screen), you can configure a number of settings, including:

- Description – text which appears when the user hovers their mouse over the field;
 - Input field sizing – choose how the input field is sized (the configuration options vary depending on the type of field);
 - Placeholder – set placeholder text for the field;
 - Label display – choose where the label is displayed in relation to the field.
- If you are happy with the default settings, just click 'Save component'.
- The form component has been added to the form.

Setting the submission button label and confirmation message

- On the *Form settings* screen, create a confirmation message, e.g.:



The screenshot shows the 'Form settings' screen. At the top, there are tabs for 'Form components', 'Conditionals', 'E-mails', and 'Form settings'. The main area is titled 'Submission settings' and contains a 'Confirmation message' section. Below this section is a rich text editor with a toolbar containing icons for Source, Undo, Copy, Paste, Bold, Italic, Underline, Strikethrough, Bulleted list, Numbered list, Indent, Outdent, and Quote. The text in the editor reads: 'Thanks for sending us your email address. We'll add you to our mailing list shortly.'

- In *Advanced* settings, edit the text on the *Submit button*, and Save configuration, e.g.:

3

Advanced settings

- Show "Save draft" button
- Automatically save as draft between pages and when
- Show the notification about previous submissions
- Confidential submissions

Submit button label

Add me to the mailing list!

Next submission number

1

Save configuration

Configure the emails that will be generated on submission

- Emails generated when a completed form has been submitted can be sent to multiple email accounts.
- On the *E-mails* screen, add the recipient email address for the webform submissions:
 - To send emails to the person/address managing the webform (e.g. 'webmaster@example.ox.ac.uk'), specify the address in the *Address:* field;
 - To send copies of the completed submission to users, select the title of the email address form component from the *Component value:* field.

View Edit Webform Results Revisions Access control

Form components Conditions **E-mails** Form settings

Send	E-mail to	Subject	From	Operations
<input type="checkbox"/>	webmaster@example.ox.ac.uk	Form submission from: Add me to your mailing list!	"Mosaic Platform" <no-reply@mosaic.web.ox.ac.uk>	Edit Clone Delete
<input type="checkbox"/>	Address: <input type="text" value="email@example.com"/> Component value: <input type="text" value="My email address is"/>			Add

When you click 'Add', you will see the email address configuration screen. On this screen there are several customisation options, including:

- the details in the email header: email subject; email from address; email from name – there are default settings for all three
- email template: either use the default template, or specify your own template (submission tokens need to be used in the template in order for values submitted in the form to appear in the email)

4

Every submission made via the form will be sent to the email addresses on the *E-mails* screen as and when information is submitted. The submissions will also be collated so they can be downloaded later.

Download form submissions in bulk

To download the submissions, go to the *Results* tab, then to the *Download* screen. On the *Download* screen, you can choose which file format you'd like the submissions to be exported in, as well as other configurations to review before downloading the file.

Embedding a webform on a page

A webform should be used by embedding it on a page. You can do this using the 'Form' widget in the widget dropdown list.

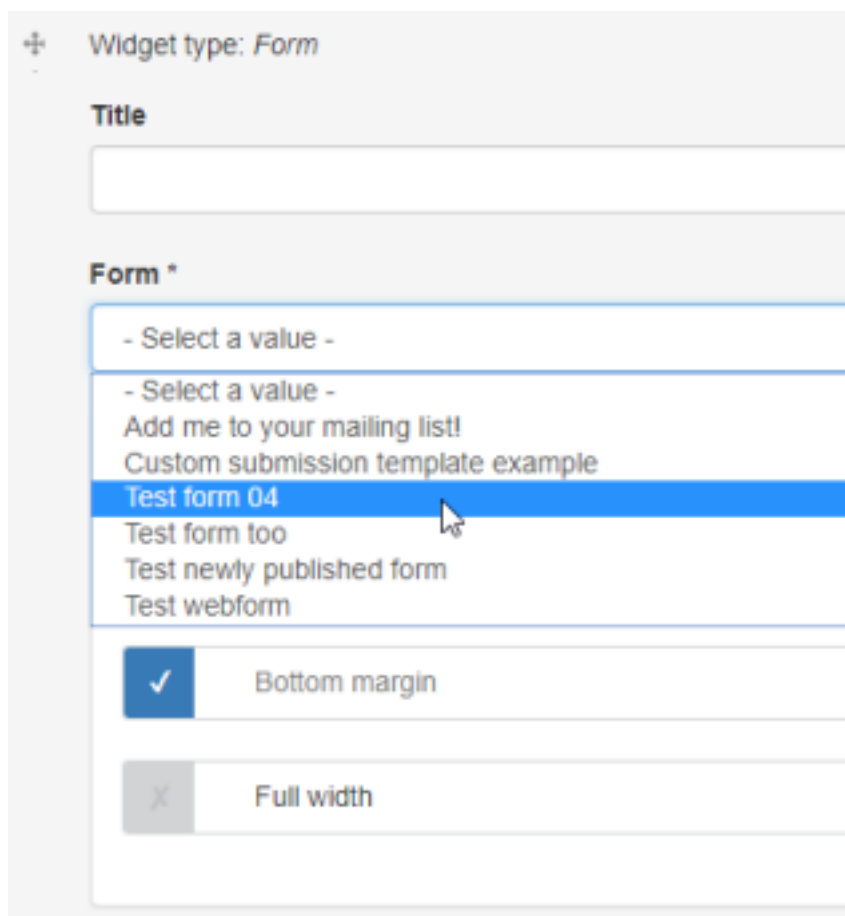
By doing this, you can manage where the webform is placed on the page and place introductory text before the webform.

If you want to add text in the middle of the form (between form components), you should create a new form component and set its type to 'Markup'.

How to embed a webform on a page:

Here is some guidance on adding your webform to a page.

- Once the webform has been created, go to the page you'd like it to appear on and add a new widget
- Select the 'Form' widget from the widget list
- Add a title to the webform (optional)
- In the 'Form*' field on the widget's editing screen, select the webform you'd like to use from the dropdown list of your webforms (see below), and Save



Widget type: Form

Title

Form *

- Select a value -

- Select a value -

Add me to your mailing list!

Custom submission template example

Test form 04

Test form too

Test newly published form

Test webform

Bottom margin

Full width

The webform should now be embedded on the page.

To add introductory text, implement a WYSIWYG widget on the page above the webform.