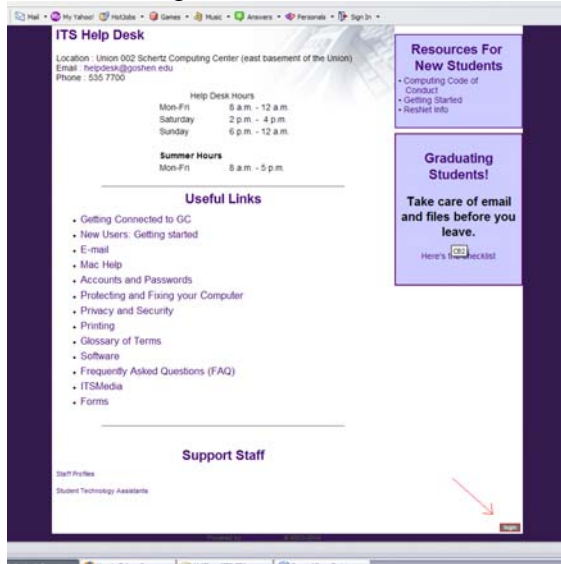


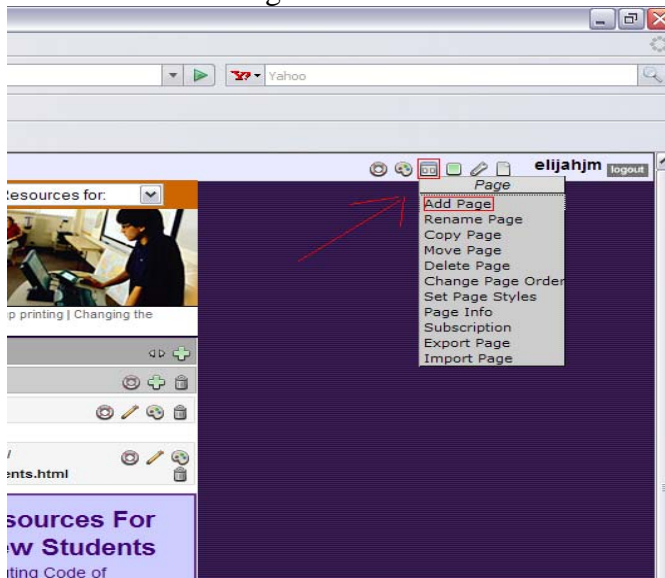
Caravel Form Training

Getting Started

1. Go to the webpage where your form is going to be located (usually www.goshen.edu/forms) and login to Caravel by clicking the grey “Login” box in the bottom right corner of the white area of the page.

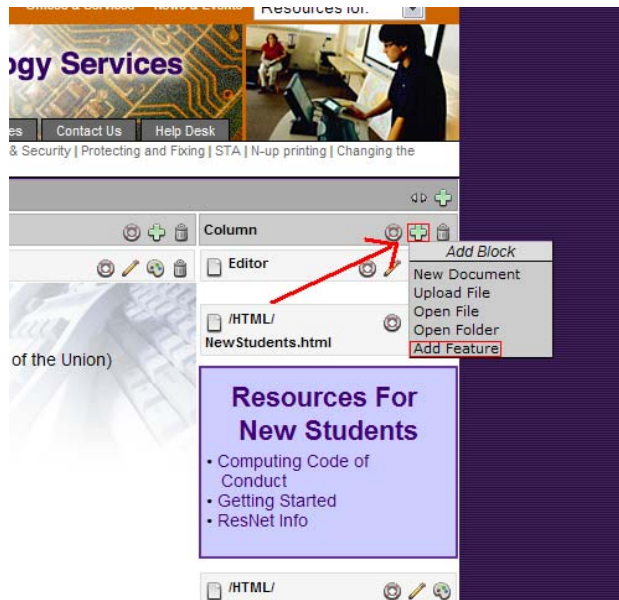


2. Click on the grey and blue box icon in the upper right corner of the screen and select “Add New Page”.

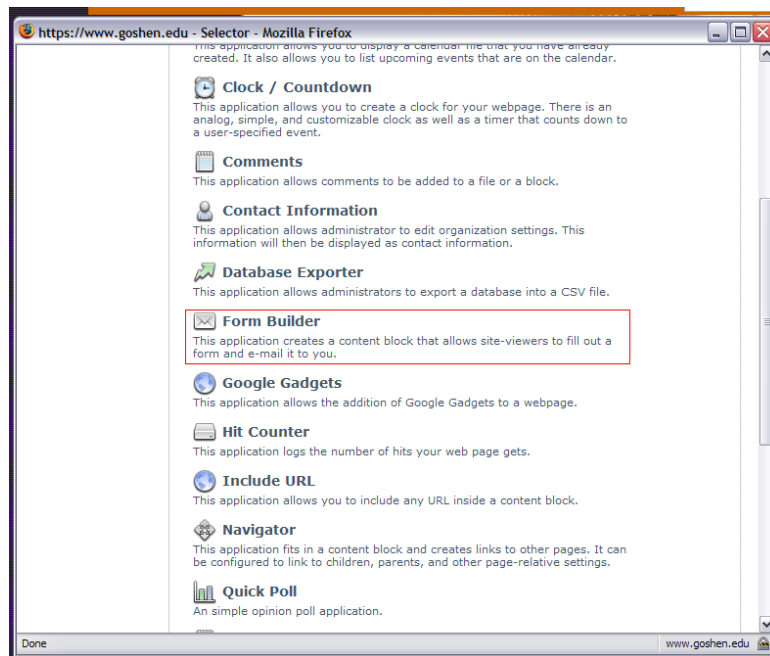


3. Type in the name you want your page to be called, then click “Create”.

4. Click on the green cross in the grey box marked “Column”, and select “Add Feature”.



5. Select “Form Builder” from the applications list.



Building Your Form

For this part of the process, it helps if you have done a little planning beforehand. How do you want your form to be organized? What input methods work best for the

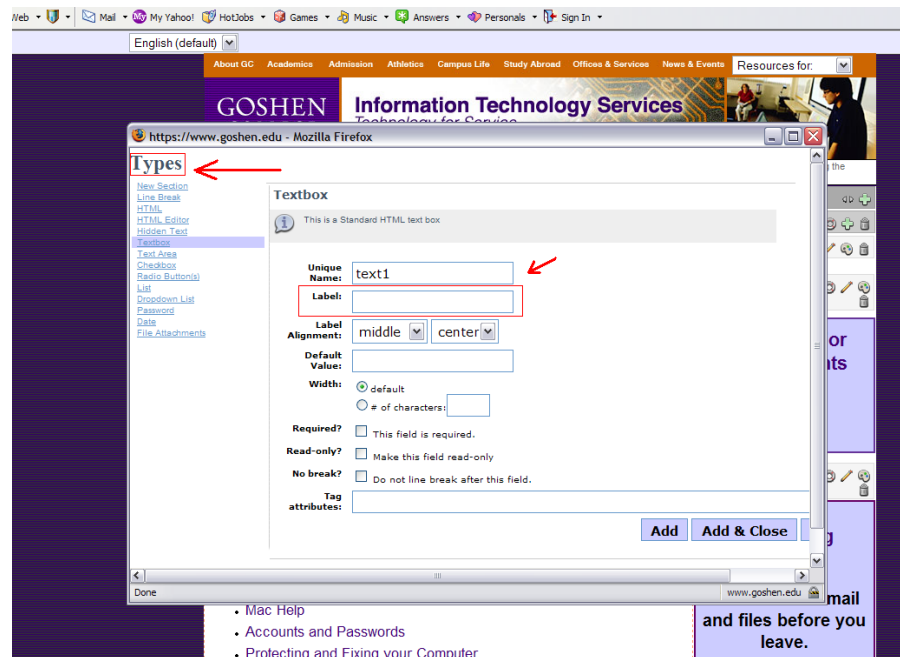
information you are trying to gather? It might help to work these out on some scratch paper that you can then refer to as you build your form.

If you look to the left on the page, you should see a “Steps” column. Under that column is a list of six steps. These are the steps you will move through as you build the form. You move from one step to the next by clicking the “Next” button on the lower right-hand part of the page. After the first time you have gone through all 6 steps on a form, you can move to any step by clicking on it under the “Steps” column.

Step 1: Form Setup

In this step, you will be adding fields to your form. The fields give different ways for the form user to enter information. Follow these steps to add your fields.

1. Click on the “Add” button in the center of the page.
2. A new window should appear. On the left hand side of that window there is a column called “Types”. It contains the types of fields you can add to your form.



3. Click on the name of the type of field you want to add.
4. Enter a label for the field. This is what the user will see.
5. Continue configuring the field until it is set how you want it to be. One thing you might pay special attention to is the box that when checked, makes that field required.

6. Once you are done configuring your field, click “Add” to add the field to the form and continue selecting others, or “Add & Close” to add the field and return to the main Form Builder window.

The names of the fields you have added should show up in the “Form fields” box on the main Form Builder page. You can change the order of the fields by clicking once on the field you want to move, then using the arrows to the right of the Form fields” box to move it up or down. Once you have this set how you want it, hit the “Next” button, located in the bottom right of the page.

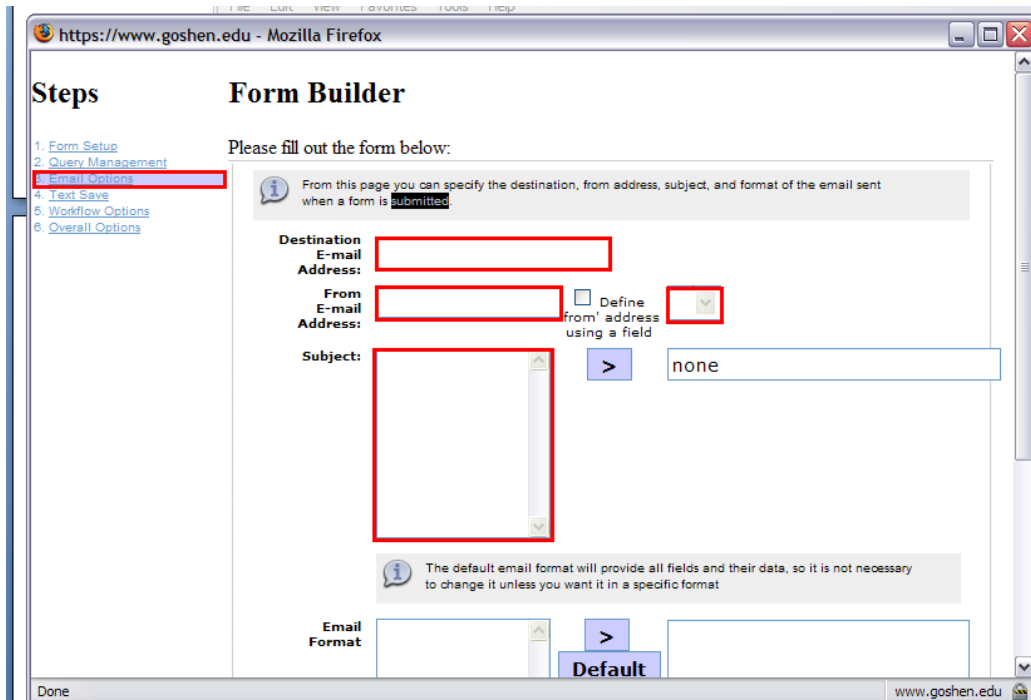
Step 2: Query Management

If you don’t know what this is, you probably won’t use it. In fact if you are planning on using it (unlikely) you should contact Theo Budiardja at extension 7734 first, as you can do a lot of damage in the Query Manager if you aren’t really familiar with it. Hit the “Next” button.

Step 3: Email Options

From this page you can specify the destination, from address, subject, and format of the email sent when a form is submitted.

1. In the box marked “Destination Email Address” type the email address you wish to have completed forms sent to. Any completed form will be emailed by default to this address.
2. In the box marked “From Email Address” type the address you wish to appear as the sender of emails containing form data. You can also have a certain field display as the “from” address. Use the tool on the right hand side to navigate this.
3. In the “Subject” box, type what you would like to appear as the subject of form emails, usually this should be the name of your form, or something that easily indicates this is a form response email.
4. The “Email Format” box is not commonly used. Usually you will want to include all of the fields on your form in the form email. Leave this box empty.



Step 4: Text Save

This step is only important if you are a frequent caravel user and want to save a backup copy of your forms within caravel. Any files saved will be in the form of filename: timestamp. This is not something most form creators will need to use.

Step 5: Workflow Options

If you don't know what this is you probably won't use it. Once again, if for some reason you do plan on adjusting the workflow options, contact Theo Budiardja first at extension 7734. Move on to the next step.

Step 6: Overall Options


These are some general settings for your form. Depending on the kind of form, you can either check or uncheck these options at your own discretion. The "Thank You Message" will be displayed after a user has finished filling out your form. It is an optional field. The submit button title field will change the label on the form's submit button. Usually "Submit" or "Send" is sufficient. Usually a custom javascript for your submit button is unnecessary. Once you have chosen these overall settings, hit "Finalize" and your form will be complete.

https://www.goshen.edu - Mozilla Firefox

Steps Form Builder

- 1. Form Setup
- 2. Query Management
- 3. Email Options
- 4. Text Save
- 5. Workflow Options
- 6. Overall Options

Please fill out the form below:

 From this page you can set options for the functionality of the form as well as provide a message to display to users after the form has been submitted.

Make submissions unique (only one per user, requires the form be login only) Force uniqueness

Check for submissions for spam? Reject submissions with urls, advertisements, etc.

Allow immediate resubmit?

Thank You Message:

Submit Button Title:

Reset Button? Show the reset button.

Custom Javascript for Submit Button:

[Previous](#) [Finalize](#)

Done www.goshen.edu