

ADOBE ACROBAT 7.0

CREATING FORMS

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Getting Started

1. Create a document using MSWord or other document software – make sure all instructions for your constituents are typed in the document so they will know how to complete the form.
2. If you need help on Word Tables, visit <http://unit.villanova.edu/workshops/manuals/> and look for the Word 2003: Tables handout.
3. To create the PDF file from the original Word document:
 - a. Save your Word document.
 - b. Click File and select Print.
 - c. From the printers list, change your printer to the Adobe PDF and click OK. (If you don't see this option, you do not have Adobe Acrobat Professional.)
 - d. Another way to make a PDF file from your Word document is to click the  *Convert to Adobe PDF* button on the Adobe toolbar in Word.
 - e. When the "Save Adobe PDF As" window appears, select the folder you want to save the PDF file into and type a name for your PDF file (unless you want it to have the same name as the Word file). If you plan on posting your form on the web, be sure to use no spaces or caps in the filename (e.g., my employment application form name would be emp_app.pdf).
Note: The default location for the PDF file may not necessarily be the same location as the original Word document. You may need to change the "Save in..." box to match the folder where the Word document has been saved - e.g., My Documents).

- f. Click Save.
- g. The Adobe PDF file will be created in the background. It may or may not appear on your screen (or on the taskbar below) when complete. If it does appear, you know it is done. If it does not appear, exit Word and open the folder where you saved the file, then double-click on the file. The file will open in Adobe Acrobat. DO NOT attempt to open the PDF file from within Word or the file will look like gibberish.
- h. If the Adobe file DID open up on your screen (or down in your taskbar), click on the file and maximize it.

Creating the Adobe Form

Once your new Adobe PDF file is open on your screen, you should make sure the following two toolbars are visible on your screen:

1. *Advanced Editing Toolbar* – To turn this on, click View, Toolbars, Advanced Editing. If it already has a check mark next to it, then it is already on.
2. *Forms Toolbar* – To turn this on, click Tools, Advanced Editing, Show Forms Toolbar. If this says Hide Forms Toolbar, then it is already on.

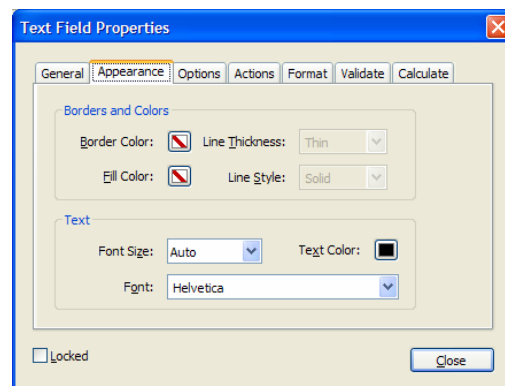
You can use either of these toolbars to insert fields into your form. *If using the Advanced Editing toolbar to insert your form fields*, locate the 6th button on the toolbar, which is the Forms button. The Forms button has a down arrow located to the right of it. Click that down arrow to select the type of form field you want to insert into your form. *If using the Forms toolbar to insert your form fields(recommended)*, simply select the type of field you want to insert by clicking the corresponding button on the Forms toolbar.

Types of Form Fields to insert:

1. Button - for action buttons (see below)
2. Check box - allowing user to select multiple options
3. Combo box - allowing user to select an option from a drop-down list (recommended)
4. List box - allowing user to select an option from a scrolling list (not recommended)
5. Radio Button - like a check box, but only allows user to select one button, as long as all buttons in group have the same field name
6. Text – Most common - used for text such as name, address, etc.
7. Digital Signature - digital signatures - not supported by UNIT

To insert a Text Field

1. From either the Advanced Editing or the Forms Toolbar, click the **Text Field Tool** button.
2. Click, hold and drag the mouse to draw the size of the form field you want to create.
3. Don't worry about the size of the field since you can always resize it later.
4. The Text Field Properties box will appear (the tab you are on may vary):



- a. Click the **General** tab and type a short name for the field, without using spaces (e.g., FirstName).
Note: If you have two sections in your form that need the same data to be filled in (e.g., Name), you can give both fields the same name and once the user fills in one field, the other will automatically be filled in with the same data.

In the *Tooltip* section, type a short description; preferably something to help the user understand what is expected. For the hearing impaired, the field name displays the information requested. For the sight impaired, the device for aiding the user will say the field name.

If you want the field to be Required, place a check the *Required* box. Leave all other attributes on the General tab as is.

- b. Click the **Appearance** tab, define your border color and fill color, line thickness and line style. Then select your font color, type and size. *If you leave the font size set to Auto, the font size will expand and shrink depending on the amount of text typed in the box.* It is recommended that you select a fixed font size such as 10 or 12.
- c. Click the **Options** tab. If you are creating a large text box where you want the user to be able to type a lot of text, check the *Multi-line* box. Be sure to uncheck the *Scroll long text* box so that the text the user types does not scroll on forever.
- d. You do not need to click the **Actions** tab.
- e. The Format tab will allow you to define the text as a number, a percentage, a date field, time, zip, phone, SSN, or define your own type of script. For normal text, this is not necessary. Note: If you limit this to something specific, such as Date, the user will get an error if he/she attempts to type a date any way other than the format you have specified. This can be frustrating for users. It is best not to set any type of limits.
- f. You do not need to click the **Validate** tab.
- g. The Calculate tab allows you to perform a calculation on the numbers entered into a text field. To calculate numbers, the Format of this field must be set to Number, as should the fields that you want to calculate. Once you set the Format to Number, you can click on the Calculate tab and select the second option ("The value is the sum of the following fields"). Click Pick to select the fields to be calculated and click OK and OK again.

To insert a Check Box/Radio Button

The difference between a Check Box and a Radio Button is that check boxes are used to allow users to select more than one option, where radio buttons only allow users to select *one* of the multiple options. If you have more than one check box, each field should have a different name. For a group of radio buttons, each field in the group should have the same name.

1. From either the Advanced Editing or the Forms Toolbar, click the **Check Box Tool** or the **Radio Button Tool**.
2. Click, hold and drag the mouse to draw the size of the form field you want to create (make them small). Don't worry about the size of the field since you can always resize it later.
 - a. Click the **General** tab and type a short name for the field, without using spaces.

In the *Tooltip* section, type a short description; preferably something to help the user understand what is expected. For the hearing impaired, the field name displays the information requested. For the sight impaired, the device for aiding the user will say the field name.

If you want the field to be Required, place a check the *Required* box. Leave all other attributes on the General tab as is.

- b. Click the **Appearance** tab, define your border color and fill color, line thickness and line style. Then select your font color, type and size. *If you leave the font size set to Auto, the font size will expand and shrink depending on the amount of text typed in the box.* It is recommended that you select a fixed font size such as 10 or 12.

- c. Click the **Options** tab. This is where you will type your list for the drop-down or scroll list.

For a check box, select the Check Box Style (disregard the Export Value) and select whether or not you want the check box to be checked by default.

For a radio button, select the Button Style. In the Export Value, type the value for the first radio button (e.g., if it is a Gender button, type MALE). You should select the other radio buttons in this group and type a different Export Value for them (e.g., FEMALE). Then select whether or not you want the button to be checked by default and if you want “Buttons with the same name and value to be selected in unison.”

To insert a Combo Box or List Box (Combo Box is drop-down; List Box is scrollable)

1. From either the Advanced Editing or the Forms Toolbar, click the **Combo Box Tool** (recommended) or the **List Box Tool**.
2. Click, hold and drag the mouse to draw the size of the form field you want to create. Don't worry about the size of the field since you can always resize it later.
 - a. Click the **General** tab and type a short name for the field, without using spaces.

In the *Tooltip* section, type a short description; preferably something to help the user understand what is expected. For the hearing impaired, the field name displays the information requested. For the sight impaired, the device for aiding the user will say the field name.

- b. Click the **Appearance** tab, define your border color and fill color, line thickness and line style. Then select your font color and size.
- c. Click the **Options** tab. This is where you will type your items for your drop-down or list.
 - i. In the Item box, type *Please Select* as your first item, then click **Add**.
 - ii. Type each of the additional items on the list in the Item box, click **Add** after each item.
 - iii. You can select an item and *Delete* it or *Move Up* and *Move Down*. You can also *Sort* the items on the list and *Allow user to enter custom text* (text that is not on your list). The “Commit selected value immediately” option is not necessary.
 - iv. For List Boxes, if you want users to be able to select more than one item, check the **Multiple Selection** box. If you check this box, you must instruct users to use their Ctrl key to select more than one item and the field must be tall enough for you to see all items on the list.
 - v. You do not need alter the *Actions* or *Selection Change* tabs.

To insert a Button (Save Form, Print Form, Reset Form, Email Form)

Important Note: Only those users with the full Adobe Acrobat (Writer) program can utilize the *Save Completed Form* and the *Email Form* features. Users who have only the Acrobat **Reader** can only save a *copy* of the *blank* form. Users with the Acrobat Reader can, however, *Print* the *Completed* form.

Therefore, if your form is going to be used internally, you can create the *Print Form*, *Save Completed Form* and *Email Form* buttons, but if it will be used outside the University, you can only use the *Print Form* button.

The *Reset Form* button will work with all versions of Adobe, including the Reader.

1. From either the Advanced Editing or the Forms Toolbar, click the **Combo Box Tool** (recommended) or the **List Box Tool**.

2. Click, hold and drag the mouse to draw the size of the form field you want to create. Don't worry about the size of the field since you can always resize it later.
 - a. Click the **General** tab and type a short name for the field, without using spaces.
 In the *Tooltip* section, type a short description; preferably something to help the user understand what is expected. For the hearing impaired, the field name displays the information requested. For the sight impaired, the device for aiding the user will say the field name.
 Under *Common Properties*, change the **Form Field:** section to **Visible but doesn't print**.
 - b. Click the **Appearance** tab, define your border color and fill color (you can make it fancy), line thickness and line style. Then select your font color and size. You might want to make the font color larger than normal, such as 14 pt.
3. Click the **Options** tab. Type a **Label** to appear on the outside of the button (e.g., Print Form, Save Form, Email Form, or Reset Form).
4. Click the **Actions** tab. Leave the *Select Trigger* as is.
5. In the **Select Action** dialog box, select the following action depending on what you want to button to do:

Print the Completed Form

- Leave the *Select Action:* field set to **Execute a menu item**.
- Click **Add**.
- From the *Menu Item Selection* box, click **File** and select **Print...**
- Click **OK**.
- Click **Close**.

Save the Completed Form

- Follow the steps above but choose **File - Save As...** as the action.

Email the Completed Form

- Follow the steps above but choose **File - Email** as the action.

Reset the Form

- Change the *Select Action:* field to **Reset a form**.
- Click **Add**.
- Select the fields that you want to have reset when the user clicks the Reset button. If you want to reset all buttons, click Select All. If you want certain fields to always remain filled in (such as name and dept.), uncheck those fields.
- Click **OK**.
- Click **Close**.

Aligning Fields by Size and Location

When creating multiple fields, you do not need to worry about getting them perfectly lined up or exactly the same size as the other fields. You can use your Align and Size features to make one or more fields the same as another field.

Aligning fields to the same location (plane) on your form

1. To align more than one Text Field, click the Text Field Tool button so the Text fields become visible.
2. Determine which field will be 'leader' and make sure that it is aligned where you want the others to be.

3. Click on one of the text fields and hold your *Shift* key (NOT Ctrl) down, then click on the other fields you want to be aligned. They will all highlight in red except the last field you select, which will be blue. The blue field is the “leader”, which means that all the other red fields will align with the leader, so be sure to select your leader field last.
4. When you are finished, right click on any of the selected fields and select *Align*, then choose top, bottom, left or right. All the red fields will line up with the blue leader field.

Aligning fields to the same size on your form

1. Determine which field will be 'leader' and make sure that it is sized to the dimensions that you want the others to be.
2. Click the fields that you want to follow the “leader”, holding your Shift key to select more than one.
3. While still holding the *Shift* key, select the “leader” field, which should become blue.
4. When you are finished, right click on any of the selected fields and select *Size*, then choose height, width or both.

Setting The Tab Order On Your Form

When users complete your form online, they will use their Tab key to move from field to field. Therefore, you will want to control where their cursor lands each time they hit Tab. This is called the **Tab Order**. To set the Tab Order on your form:

1. On the left-hand side of your form, click the **Pages** tab (below Bookmarks and Signatures).
2. Select the first page of your form and then click the **Options** button at the top of the Pages pane.
3. Select **Page Properties** (if this is grayed out, you haven't selected your page).
4. On the Tab Order tab, select one of the options. Use Row Order is recommended.
5. Click Close.
6. Click the Hand tool and test your tab order by tabbing from the first form field down.

Saving and Testing Your Form

Saving Your Form

As you are working on your form, you should be saving it often. To do this:

1. Click *File* and select *Save As...* from the list.
2. The filename of your form should already be in the filename list.
3. Click *Save*.
4. You will be asked if you want to overwrite the existing file. Click *Yes*, unless you want to give the file a new name.

Each time you save your form, you should complete the steps above. DO NOT click File, Save, but always use the File, Save As feature. This will keep your file from getting too large, as everytime you use the Save As feature, the file is compressed.

Testing Your Form

To test your form out, click on the Hand tool (looks like a white glove on the left-hand side of your toolbar. Complete the form, being sure to type in every field to see how things look.

If you need to make changes to a field on your form, click on the form tool that corresponds with that field (e.g., if you need to change a check-box, click the Check Box Tool on the forms toolbar). Then double-click on the field you want to edit.

Important Note: When testing your form out, if you click on the Save Completed Form button, be sure to give the file a new name, or else your form will be saved with everything you have typed.

Before you post your form on your website or send it to anyone, be sure that your form is empty (that anything you typed in the fields when testing is now cleared out) and that all drop-down lists are set the *Please Select* mode.

Editing Text On Your Form

You can use the Text TouchUp Tool and the TouchUp Object Tool to add/remove text or objects (lines) from your form. However, using these tools increases the size of your file, so you should use these only in emergency.

Using the TouchUp Text Tool

1. Locate the Touchup Tool (looks like a big T) on the Advanced Editing Toolbar (two buttons over from your Form Tools).
2. Click the down arrow to the right of the TouchUp Tool and select *TouchUp Text*.
3. Click on the line of text you want to edit or add. The section will become highlighted in blue.
4. Delete or add the text you want.
5. Click the Hand Tool or the Form Tool when finished.

Using the TouchUp Object Tool

6. Locate the Touchup Tool (looks like a big T) on the Advanced Editing Toolbar (two buttons over from your Form Tools).
1. Click the down arrow to the right of the TouchUp Tool and select *TouchUp Object*.
2. Click on object that you want to remove. Sometimes it is hard to grab the object you want to delete, so you may have to keep trying. If it looks like it is selecting more than just the object that you want to delete, even though you clicked right on your object, try hitting *Delete* on your keyboard anyway and see what happens.
3. Hit the *Delete* key on your keyboard.
4. If you delete something you did not intend to, click on *Edit* and select *Undo Delete*.
5. Click the Hand Tool or the Form Tool when finished.

What To Do If You Need To Redo Your Form

If you need to make major changes to your form, you should go back to the original Word document, make the necessary changes, and recreate your PDF form. However, you do not need to redo the entire PDF form - rather, you can copy the fields from your first form and copy them to your newly-created form. To do this:

1. Save your first Adobe form and close it.
2. Open your Word document, make the changes, save the file and re-print the form to the Acrobat Distiller.
3. When asked what you want to call your new PDF file, give it a new name - DO NOT overwrite your old PDF form.
4. Once the new PDF file is complete, open it.
5. Then in Adobe, click File, Open and open your old PDF form.
6. You will not see both files open at the same time, but when you click on *Window* from the menubar above, you will see that both files are open.
7. From the Window menu, select the old PDF form.
8. You can now copy your form fields from the old form and paste them into the new form, but you must do each type of form field separately. For instance, you can copy all the Text Fields at once and copy and paste them to the new form. Then you can select all the Check Box form fields at once and copy and paste them to the new form, etc.
9. To select and copy all of the Text Box form fields from your old form, select the Text Field tool from the Advanced Editing or the Forms toolbar. Then click **Ctrl-A** on your keyboard. All fields will be highlighted.
10. Then hit **Ctrl-C** on your keyboard to copy all of the fields.
11. Click *Window* again and return to the *new* PDF form.
12. To paste all of the fields into this form, hit **Ctrl-V** on your keyboard. All of the fields will paste in, but they may not be in the correct location. DO NOT ATTEMPT TO MOVE THEM ONE BY ONE. FOLLOW THE DIRECTIONS BELOW TO MOVE THEM ALL AT ONCE.
13. Being careful not to click anywhere with your mouse (you want all of your newly pasted form fields to continue to be highlighted), use your up, down, right and left keys on your keyboard to move the group of pasted fields into place where they belong. Then to move individual fields into place, click on a blank area of the form (to deselect the multiple fields) and move the individual fields into place.
14. Add any additional fields you need to add to the form.
15. Click File, Save As to save your new form.

Creating Hyperlinks on Your Form


To turn typed website addresses in your document into active hyperlinks

If you have any website addresses typed on your form, you can easily turn them into active clickable hyperlinks. They can begin with http:// or just with www. To do this:

1. Click **Advanced** from the menubar above and select **Links**.
2. Select **Create from URLs in Document...**
3. You will be prompted as to which page you wish to establish links. The default is all pages. Leave that selected and click OK.
4. It will tell you how many links it has made.

5. To test your link by clicking the Hand tool and clicking your links, then select whether you want the link to load in Adobe or a Web Browser (browser recommended).

To establish an individual link, including an email link from plain text

1. Select the Link Tool  on your Advanced Editing Toolbar.
2. Highlight the text you wish to hyperlink.
3. Once you have outlined the desired text, a Create *Link* box will open.
4. Define the desired Link Appearance (type, highlight style, line thickness/style, and color).
5. Under Link Action, select the action you want it to take. If you are not sure which to use, click the *Help* button on that page. If you want your link to take the user to a website, select “Open a web page.”
6. Click Next.
7. Type or paste the URL for the link (no need to type http://).
8. If you are establishing an email link, use “Open a web page” as the Link Type and then instead of typing a website, type the email address preceded by *mailto:* (e.g., *mailto:someone@somewhere.edu*).