

# Create a PDF Form - Introduction

## PDF Forms

Print and Fill-type PDF forms are like paper forms. They can be obtained online, printed, then filled in with a pen and then submitted.

Fill and Print-type PDF forms can be filled out on-screen and then printed, providing legible content. You will learn in this introductory lesson how to create this type of form.

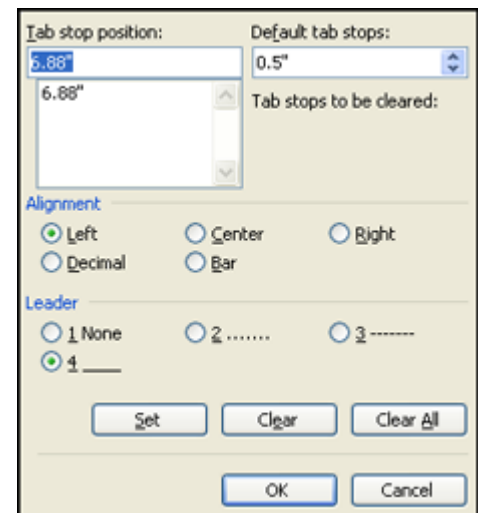
## Plan ahead

1. Make a list of the information you want.
2. Define the form data you need to collect.
3. Will this form be filled in with Adobe Reader or *Adobe Acrobat Professional*? If it is filled out using *Acrobat Reader* then it cannot be saved but the form fields can be filled in and the form can be printed. In order to save the form, you must open it with Adobe Acrobat Professional.
4. Sketch out the form on paper. You will probably want to use the 8.5 by 11-inches size.
5. Lay out the static parts of the form, such as text, labels, underlines, and images.

## Create the background and visual layout of the form.

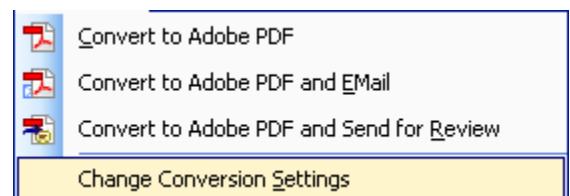
Use *Microsoft Word*. You are given a file in *Microsoft Word* for an Out-of-State Conference Request Form. If you don't know how to follow these instructions, please ask for individual assistance.

1. Note that the top lines of the document are spaced so that there is enough space between the lines to fill in the requested information.
2. This was done by using the format paragraph dialog and using the spacing of 8 points after each paragraph (in this case after each line). This is found in the INDENTS AND SPACING tab of the paragraph dialog in the SPACING section of the page.
3. The underlines were created by using tabs with a line leader. See picture at right showing the tab setting of the top four lines with the underline leader selected.
4. You will then want to make a 5.25-inch vertical space between the line starting "Justification" and the space at the page bottom for signatures.
5. Do this by using a spacing of 72 points for each inch space you want following the Justification line. Calculating 72 points times 5.25 inches gives you 378 points for your setting in the Paragraph dialog for the "After" setting
6. When finished preparing your Word document, convert it to a PDF file and add the form fields using Acrobat Professional.



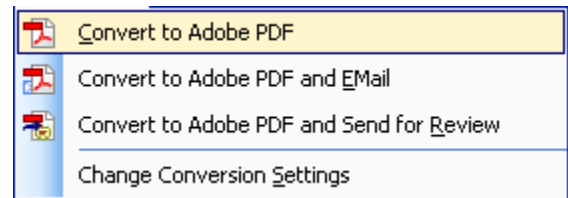
## Convert from a Word 2003 file

- Choose Adobe PDF menu, then select CHANGE CONVERSION SETTINGS.



- Click these settings:
  - View Adobe PDF
  - Prompt for Adobe PDF file name
  - Enable Accessibility and Reflow With Tagged PDF
- Choose the Adobe PDF menu, then select CONVERT TO ADOBE PDF

- Leave Conversion Settings to Standard
- Prompt for Adobe PDF file name
- Convert Document Information
- Enable Accessibility and Reflow with Tagged PDF



- Do the conversion.
- When the file is converted, rename it (if it has a very long file name) so its name is shorter.

## Display the forms toolbar in Acrobat Professional 7

1. On the TOOLS menu, choose ADVANCED EDITING.
2. On the submenu, choose SHOW FORMS TOOLBAR
3. The FORMS TOOLBAR displays.



## Review the form field tools

### The Acrobat Forms icons, from left to right are:

**Button.** A button can specify an action, such as opening a file, playing a sound, or submitting data to a web server

**Check box.** Check boxes present a group of choices from which you can typically select one or more items.

**Combo box.** Combo boxes present a list of items in a pop-up menu for you to choose from or let you enter your own values. The use of a Combo box is questionable because of accessibility.

**List box.** Displays an entire list of options that you can scroll through and from which you may be able to select more than one item.

**Radio buttons.** These present a group of choices from which you can typically select only one item.

**Text field.** Permits input of text such as name, address, and phone number. This is the form that you will use the most.

**Digital Signature Field tool.**

## Text Field Properties

This form contains only text fields. Text fields can be set up to accept user input, to display text strings, and to allow multiple lines of text to be typed in a field. You can also set a wide variety of text field properties, such as limiting the number of characters a user can type into the field, and displaying vertical lines between each character inside the text field.

Note: Some property settings are dependent on others. For example, you cannot check the spelling of

a password field or a field used for file selection. These options are unavailable. You must deselect the check spelling option before you can select the password or field used for file selection options.

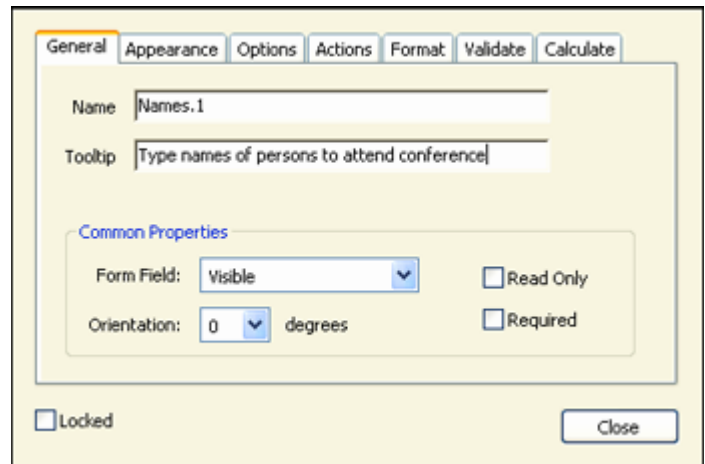
## Changing text field properties

The text field properties dialog box has the following tabs:

### General

When you create a text field, the text field properties dialog displays with the GENERAL tab open. In this tab, you will name the field (a short name is better). In this form, there are four identical fields on which to type in and list the names of persons who will attend the out-of-state conference. Therefore, you will save time if you input the field properties in the top field and then duplicate the field in the spaces below the top one. Do the following:

1. Draw a long, rectangular outline with the text tool to create a field for the names on the top line.
2. On the GENERAL tab, name the field with a name that is followed with a period and a number 1 (for example, names.1). When you duplicate this field, the four fields will be named in sequence.
3. The dialog has a place for you to type a tool tip. When the user's cursor hovers over the finished form, the tool tip displays.



### Appearance

You will not need to use any borders or background in the APPEARANCE tab. You have already placed an underline in *Word* on which the text field sits.

### Options

In the **Text Field Properties** dialog box, click the **Options** tab, and then do the following:

Select the text field alignment from the **Alignment** menu. This sets the alignment of text within the text box; it does not align the text box itself. Usually the default alignment is Left.

Select the font you want and the font size you prefer. Select a basic font. Make sure the fonts you use are available on your computer.

Do not select Scroll Long Text, as the user will print the form, and the data that is entered must be viewed to be printed.

Do not select Check Spelling, as most names are not in standard dictionaries.

When finished, click the CLOSE button.

## Duplicate the first line

1. With your text field tool, select the text field you have just created and right-click it.
2. On the drop-down context menu, select Create Multiple Copies.
3. A dialog displays in which you will specify how many times you want to copy the field down.

At the right note a screen picture of the top text field that is selected and the drop-down menu with the command **CREATE MULTIPLE COPIES** selected.

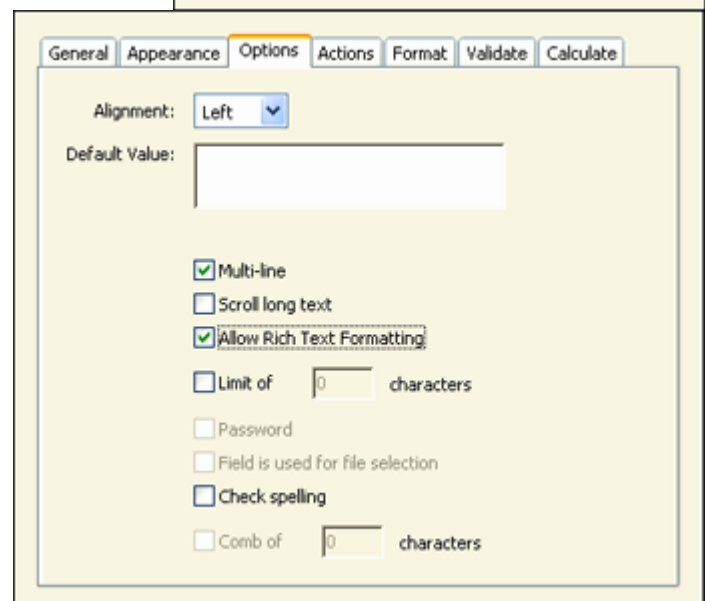
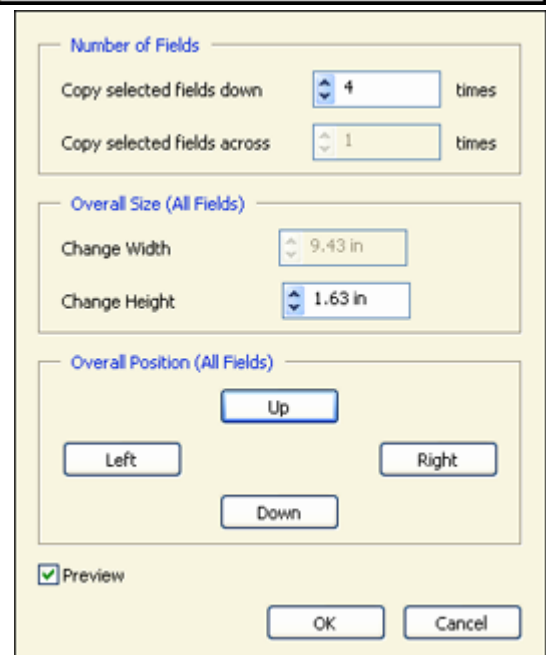
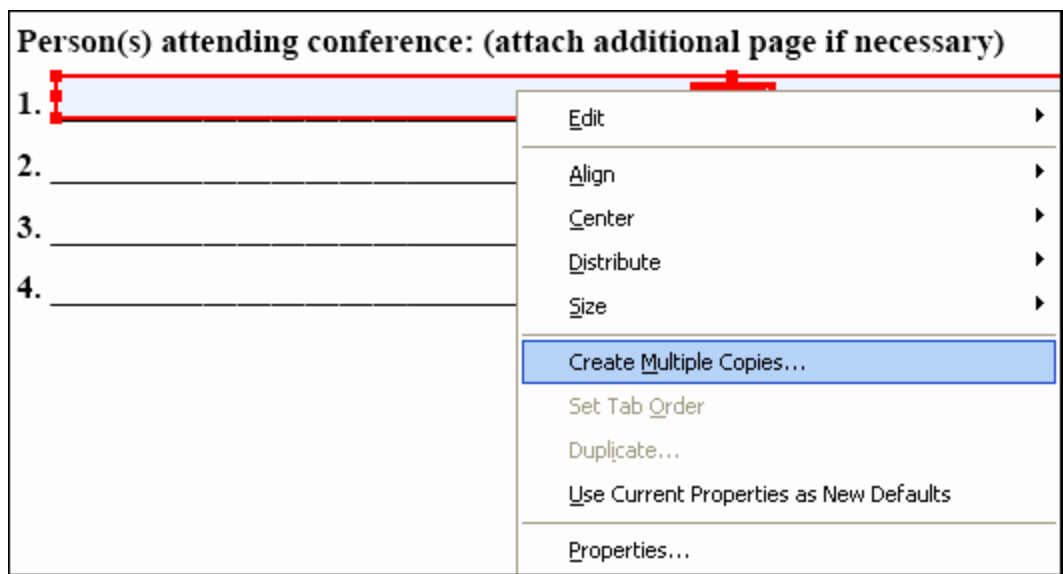
Below that picture, there is a picture of the dialog that displays in which you can specify how many copies you want, the overall size, and the overall position.

You will note that the names of each of the fields is the same except for the number following each name. All of the properties are the same.

4. When you are satisfied with your selection, click the OK button.

### Proceed to place the rest of the text fields

1. Place a text field to hold the names of the city and the state. When you insert the text field in which the estimated total cost of attendance will be placed, do not use the currency format, because the dollar sign has been typed in the Word file and is outside the text field boundary.
2. Place the large text field following the JUSTIFICATION line. In this case, you will draw the boundary just beneath the JUSTIFICATION line, following the margins on the left and the right and ending above the area in which space must be left for the signatures required at the bottom of the form.
3. Name the field.
4. In the tool tip, inform the user to type in the information and that the text will wrap automatically within the space of the field.
5. You need not use any lines on the Appearance tab.
6. Select left alignment and **Multi-line** on the Options tab. See picture at right.
7. When finished, click the Close button. You are finished with this form.



Note: The picture at right is of the completed form, and it provides a good idea of what it will look like.

Note the color of the form fields. This was done by using a forms preferences setting.

## Set Forms preferences

To control various aspects of your interaction with form fields, use the FORMS PREFERENCES. The Forms preferences affect how Acrobat handles forms when you open them.

To set Forms preferences:

1. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Forms in the column on the left.
2. To set the GENERAL forms preferences, select any of the following:

To automatically perform all field calculations upon user entry, select AUTOMATICALLY CALCULATE FIELD VALUES.

To display which form field currently has the focus, select SHOW FOCUS RECTANGLE.

To retain forms data in the Internet browser, select KEEP FORMS DATA TEMPORARILY AVAILABLE ON DISK.

To display a plus sign (+) indicating when text fields exceed the bounds specified when the fields were created, select SHOW TEXT FIELD OVERFLOW INDICATOR.

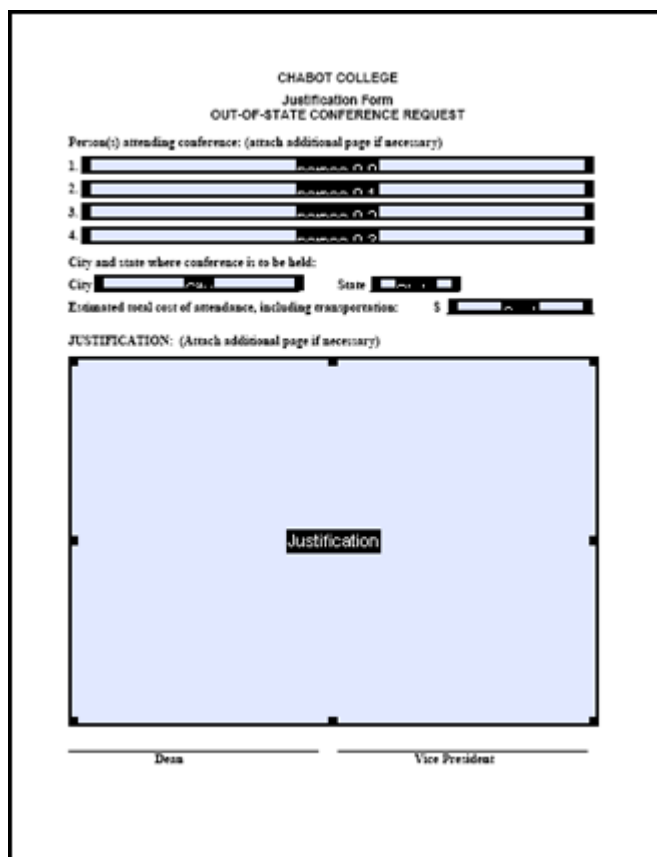
To hide the forms document message bar by default whenever a PDF form is opened in Adobe Reader, select that option. Here is a picture of the right end of the message bar showing the message.



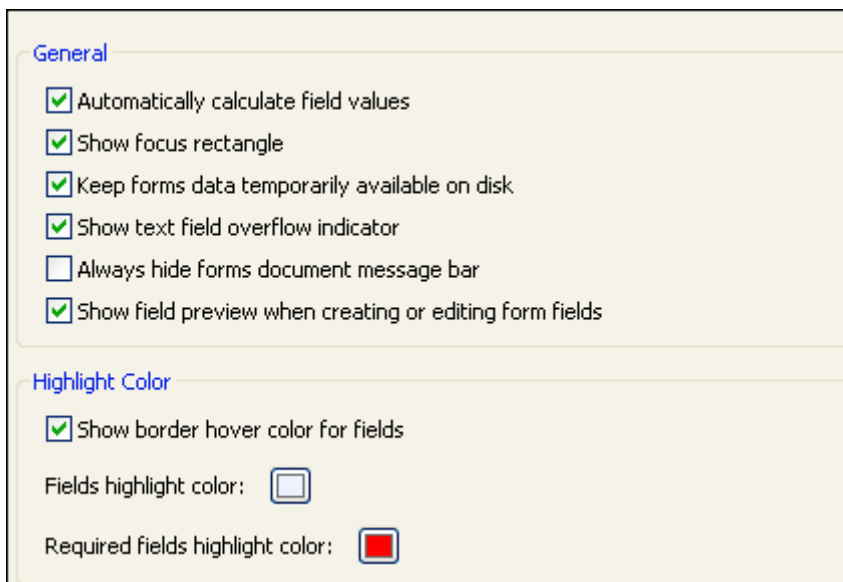
To display the appearance of a form field when creating or editing forms, select SHOW FIELD PREVIEW WHEN CREATING OR EDITING FORM FIELDS.

3. To set the Highlight Color forms preferences, do any of the following:

To display a black outline around a form field when you place the pointer over that form field, select Show Border Hover Color For Fields.



A screenshot of a completed PDF form titled 'CHABOT COLLEGE Justification Form OUT-OF-STATE CONFERENCE REQUEST'. The form includes fields for 'Person(s) attending conference' (numbered 1-4), 'City and state where conference is to be held', and 'Estimated total cost of attendance, including transportation'. A large 'JUSTIFICATION' text area is present, with the word 'Justification' centered inside. At the bottom, there are signature lines for 'Dean' and 'Vice President'.



A screenshot of the 'Forms Preferences' dialog box, showing the 'General' and 'Highlight Color' sections. The 'General' section has the following options checked: 'Automatically calculate field values', 'Show focus rectangle', 'Keep forms data temporarily available on disk', 'Show text field overflow indicator', and 'Show field preview when creating or editing form fields'. The 'Always hide forms document message bar' option is unchecked. The 'Highlight Color' section has 'Show border hover color for fields' checked. Below this, there are two color swatches: 'Fields highlight color' (light blue) and 'Required fields highlight color' (red).

If you want to change the color that appears in the background of all form fields when you select Highlight Fields in a PDF form's Document Message Bar, click the Fields Highlight Color button to select a color.

To display a particular color border around form fields that the form creator has made required, click the button next to Required Fields Highlight Color, and select a color. The color appears in required form fields only after you attempt to submit the form.

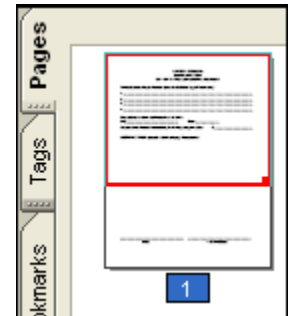
## Define the tabbing order

In the PAGES tab, you can set the order in which a user tabs through form fields, links, and comments for each page.

To set the tabbing order for form fields:

1. Click the Pages tab in the navigation pane (see picture at right).
2. Select a page thumbnail, and choose Page Properties from the Options menu.
3. In the Page Properties dialog box, click Tab Order, and select the tab order:

To tab through rows from left to right, select USE ROW ORDER.



## Using a Reset button in a PDF interactive form

One of the most-used buttons used with an interactive PDF form is the RESET button. It is used to clear any form data already entered.

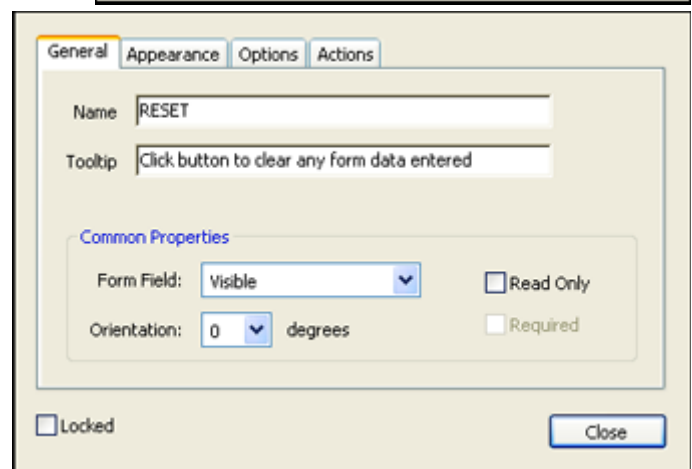
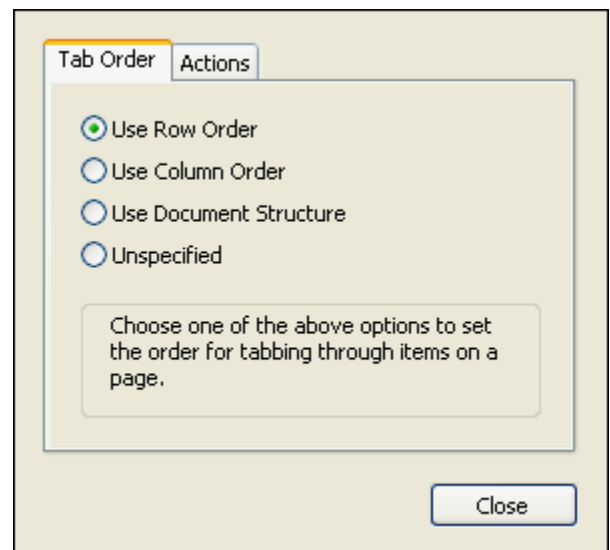
See at the right, a screen picture of a reset form button.



### Create a Reset Form button

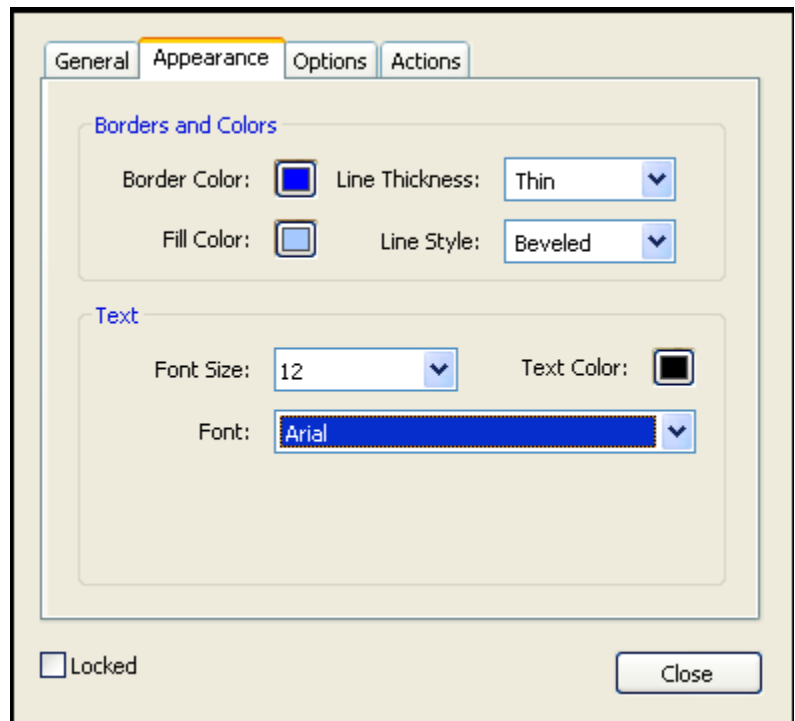
1. Select the BUTTON Tool.
2. Drag the cross-hair pointer to create the button area.
3. In the GENERAL tab page, specify a name, tool tip text, and other common properties. At the right is a screen picture of the General tab page with the information typed in for your reference.

The name of the form field in the General tab does not affect the action of the button. The text options affect the label you specify in the Options tab, not the button name in the General tab.



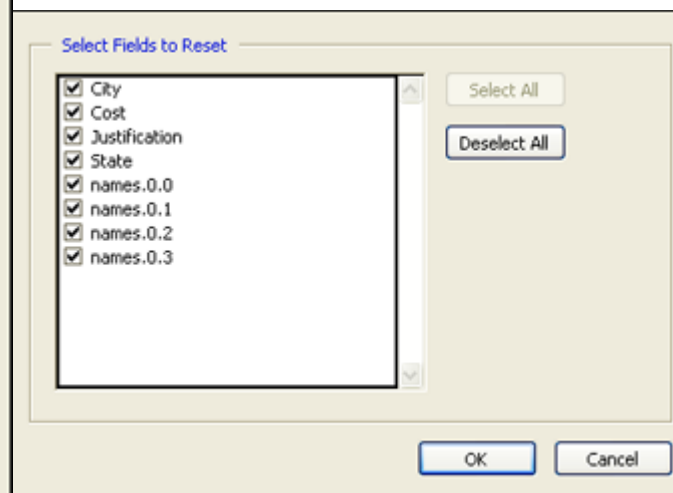
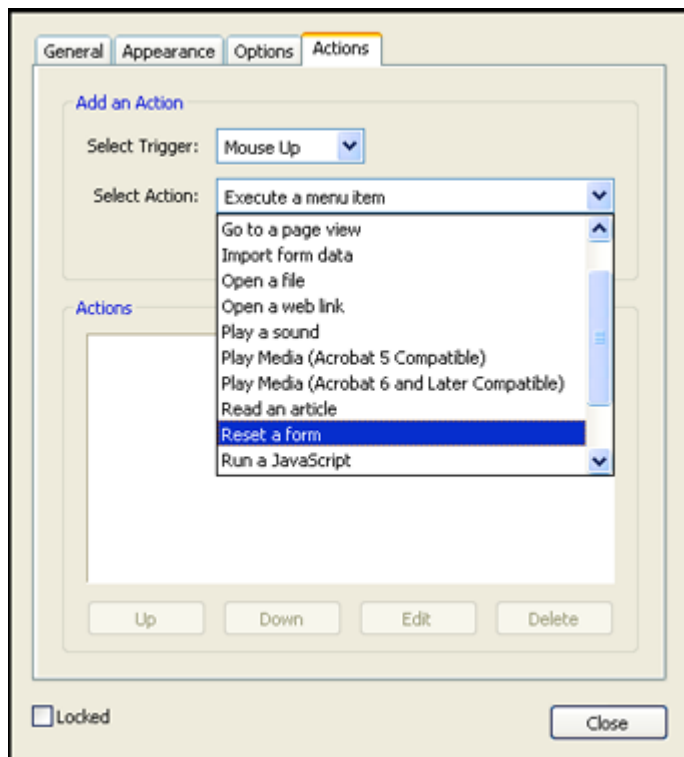
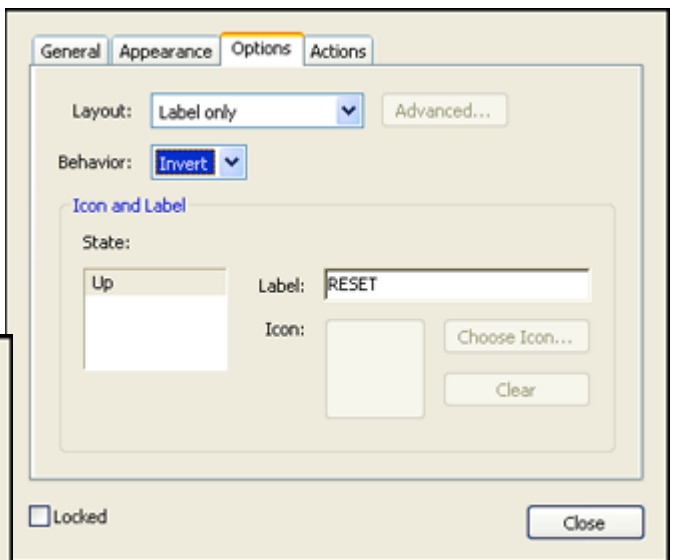
4. Click the APPEARANCE tab, and then specify options to determine how the button will look on the page. A button can have a label, an icon, or both. This button will have a label only.

5. Click the Options tab, and select options to determine how labels and icons appear on the button. In this form field, you will use the LABEL ONLY layout.
6. Click the Actions tab, and select MOUSE UP from the SELECT TRIGGER menu.
7. Select RESET A FORM from the Select Action menu, and then click Add.
8. In the Reset A Form dialog box, do one of the following, and then click OK;
  - To select individual fields, select the fields from the list.
  - To select all the fields, click SELECT ALL.
9. Click another tab in the Button Properties dialog box to continue defining properties for the button, or click CLOSE.



## Instructions for Users

Provide instructions for those using Adobe Acrobat to fill out the form. If you do not have the space on the form, then provide the information at



some place on your web site. Following are some points that may be helpful for you to include in your instructions.

1. Select the **HAND** tool to navigate through the form.
2. Use the **TAB** key to move from form field to form field.
3. To move backward in the form, users may use the **SHIFT+TAB** key combination.
4. Users alternately may prefer to click in any field and move around the form using the mouse.
5. Users should be instructed to fill in the form and then print the document. They will not be able to save the form.

## Note:

This lesson covered some uses of text form fields and one button type. In future lessons, there will be instructions for more advanced text format features.

The PDF form created in this lesson is called a fill and print form. They are filled out on-screen and then printed, providing legible content. They can then be printed and distributed by traditional means.

Adobe Acrobat has made many improvements in version 8 (the current version at Chabot is 7). When that software is installed in the HUB, a lesson will be developed that will use some of the advanced features.

