

Acrobat PDF Forms - Part 2

PDF Form Fields

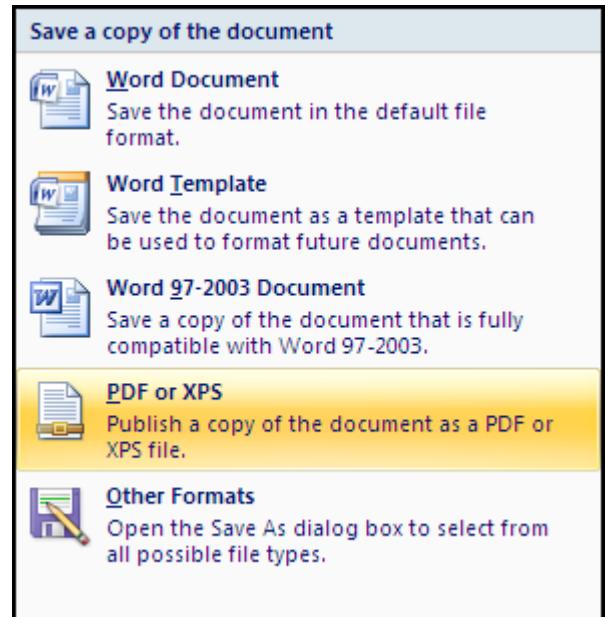
In this lesson, you will be given a file named **Information Request Form** that can be used in either Word 2003 or Word 2007. This lesson will guide you through opening the file in Word 2003 and saving it to PDF. The lesson will also include instructions for opening the file in Word 2007 and saving it in PDF. The PDF **Information Request Form** will contain, in addition to text fields, check box fields, radio buttons, and print and reset buttons.

Convert a Word 2003 file to PDF

1. Open the *Word 2003* file that contains the **Information Request Form**.
2. Choose FILE > CREATE PDF > FROM FILE.
3. Name the PDF file **Intro** and save it.

Convert a Word 2007 file to PDF

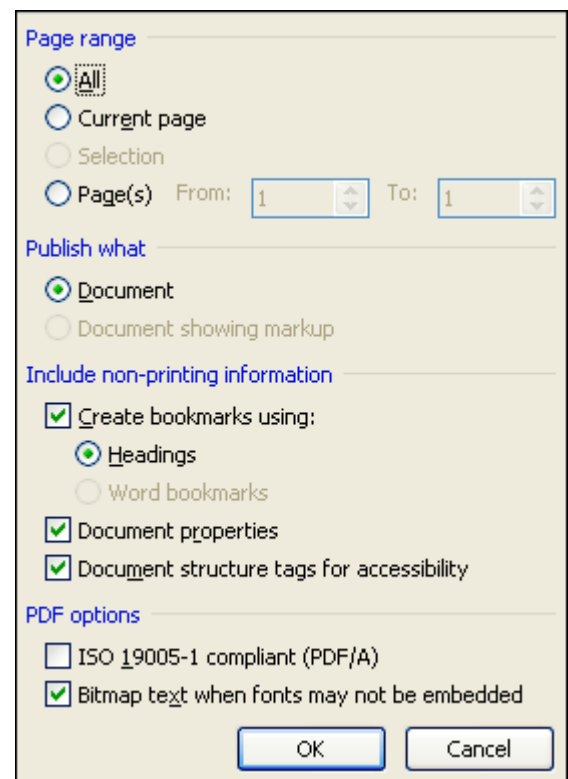
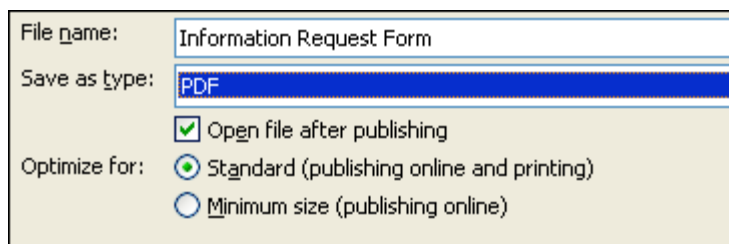
1. Open the *Word* file named INFORMATION REQUEST FORM into *Word 2007*.
2. In *Word 2007*, choose FILE > SAVE AS and then, pass your cursor to the right over the menu that appears and click to choose the PDF or XPS selection you see highlighted in this picture at the right.
3. In the SAVE dialog, click the DOWN ARROW to view the selections in the SAVE AS TYPE box, and choose PDF.
4. You will then see a dialog that allows you to make choices about the PDF file. See the picture at lower right, which shows the options available.
5. Name the PDF file **Intro** and save it.



Open the Intro.pdf file into Acrobat 7 Professional

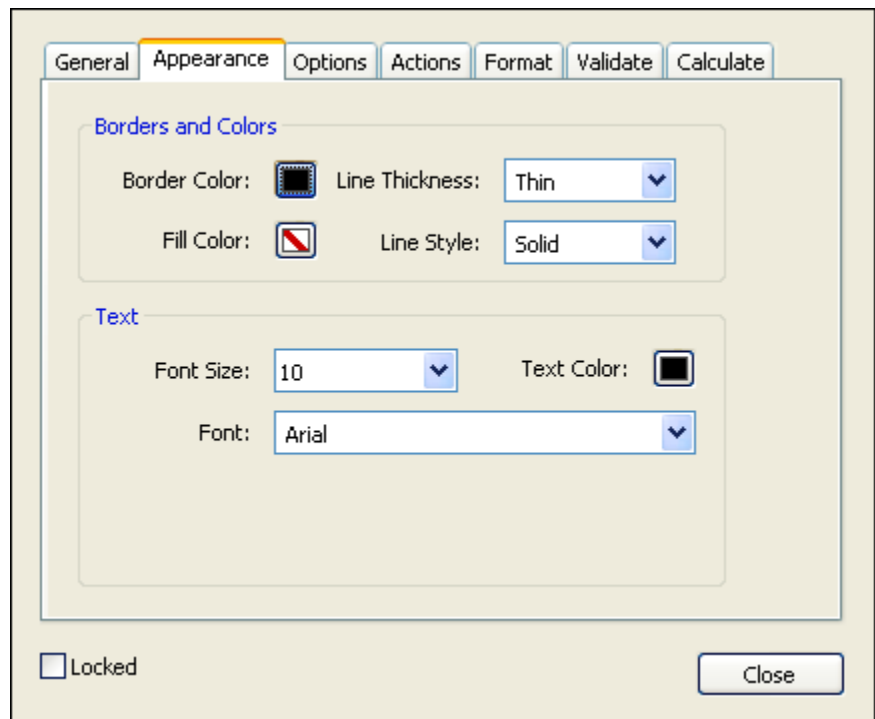
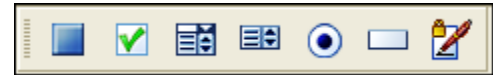
1. Open the *Acrobat 7 Professional* program, and then use the Open command in the *Acrobat* program to open the **Intro.pdf** file.
2. Choose TOOLS > ADVANCED EDITING > SHOW ADVANCED EDITING TOOLBAR to show the tools for creating an electronic form.

Note: If you double-click the PDF file rather than opening it in the Acrobat 7 Professional program, the file may be opened in Reader. You cannot create forms in Reader.



- Here is a picture of the **Information Request Form** showing the finished form with the fields which have been shaded, as well as the **Print** and **Reset** buttons.
- From the FORMS toolbar, choose the TEXT FIELD tool to create the text field in which the user will type a name.
- Drag the cross-hair pointer to create a text field.
- Create text fields for the following information: E-mail, Street, City, State/Province, Zip/Postal Code, Country, and Telephone.
- On the text field properties dialog, APPEARANCE tab, choose one of the following (depending on whether you want to outline the text fields or use an underline):
To outline the text field: use a thin line thickness, a solid line style, and a border color of your choosing. To underline the text field: use a thin line thickness, an underline line style, and a border color (dark or black).

The screenshot shows a web form titled "Information Request Form". It includes several text input fields: Name, E-mail, Street, City, State/Province, Zip/Postal Code, Country, and Telephone. There are also checkboxes for "Instruments", "Sheet Music", "Recordings", and "Lessons". At the bottom, there are "PRINT" and "RESET" buttons. The form is partially shaded to indicate where text fields have been added.



Note: If you have a form on which you will create several form fields of a certain type, you may want to set default properties for a form field type to save time, as follows:

Set default properties

- To select the form field, do one of the following:
Select the forms tool you used to create the form field that you want to change, or
Choose TOOLS > ADVANCED EDITING > SELECT OBJECT TOOL.
- Open the form field properties dialog box, and specify the settings.
- Right-click (Windows) or Control-click (Macintosh) the form field, and then select USE CURRENT PROPERTIES AS NEW DEFAULTS. (Double-click on the page to create a form field using the default properties settings for that form field type.)

Check Box fields

You will create a check box field in front of each of the following items: **Instruments**, **Sheet Music**, **Recordings**, and **Lessons**. This allows the user to choose any one or more of these selections.

- Choose the form tool showing the green check (check box).
- Draw a square in front of each of the above-specified items.
- The size of the check inside the check box is determined by the size of the font you specify.

4. On the **GENERAL** tab, give the check box a unique name, and type in a tool tip.
5. On the **APPEARANCE** tab, specify the size of the font that would be appropriate for the size of the square that you created for the form field.
6. On the **OPTIONS** tab, select a check box style. You do not want any of these fields checked by default.
7. Click the **CLOSE** button to apply the selected property options.

Create a text field in the comments area

1. Select the **TEXT FIELD** tool.
2. Draw a rectangular area in the space allocated for comments.
3. In the **TEXT PROPERTIES** dialog:
 - GENERAL TAB:** Name the form field and type the tool tip.
 - APPEARANCE TAB:** Set a color for the border, set line thickness at thin, line style at solid.
 - OPTIONS TAB:** Select Multi-line.
4. Click the **CLOSE** button.

Create Radio Buttons

To create related radio buttons, each radio button field must have the same **NAME** property, and each must have a unique export value. Place a radio button in front of **Referral**, **Internet Search**, and **Other**.

1. On the **GENERAL** tab, name the radio button and type an appropriate tool tip. The name on each of the three radio button form fields should be the same. The tool tip, however, would instruct the user to click the radio button if the user wanted to indicate Referral, Internet Search, or Other.
2. On the **APPEARANCE** tab, the border color could be a dark gray and the fill color white. The line thickness should be Thin, and the Line Style should be Inset.
3. On the **OPTIONS** tab, select a style for the radio button. The circle is the default.
4. Enter an export value to identify the radio button and differentiate it from the other radio buttons that share the same **NAME** property.
5. You do not want the radio button checked by default.
6. Click **CLOSE**.

Create a Print Button

This button will be an interactive button. When the user clicks this button, the form will print.

1. Select the **BUTTON** tool.
2. Drag the cross-hair pointer to create the button area in the upper part of the empty space.
3. Click the **GENERAL** tab and specify the name as **PRINT** and type the tool tip text, "Click to print form."
4. Click the **APPEARANCE** tab, and then specify the following:
 - Click on the swatch to the right of Border Color and choose a light color of your preference.
 - Click on the swatch to the right of the Fill Color and choose a dark shade of the border color.
 - From the Line Thickness drop-down menu, choose **MEDIUM**.
 - From the Line Style drop-down menu, choose **BEVELED**.
 - From the Font Size drop-down menu, choose 14.
 - Click on the swatch to the right of the Text Color and choose **WHITE** or any other color that will contrast with the fill color that you prefer.
 - In the font drop-down menu choose **Arial Bold** (or some other sans serif bold font).

5. Click the **OPTIONS** tab, and then specify the following:
 Layout - **Label Only**
 Behavior - **Invert**
 For Label, type **PRINT**.
6. Choose the **ACTIONS** tab and then specify the following:
 For Select Trigger, choose **Mouse Up**.
 For Select Action, choose **Execute a Menu Item**, then click **Add**
 The Menu Item Selection window appears.
7. In the Menu Item Selection window, choose **FILE > PRINT**.
 Click **OK** to accept this action and click the **Close** button to close the Menu Item Selection window (Windows), or choose **File > Print** then click **OK** (Mac).
8. Click the **CLOSE** button to close the **BUTTON PROPERTIES** window.

Create a reset button

1. Choose the **Button** tool from the **Forms Toolbar**.
2. Create a button (position the cursor below the lower left corner of the **Print** button).
3. Click and drag down and to the right, creating a rectangle that is the same size as the **Print** button.
4. In the **GENERAL** tab, in the **NAME** field enter **RESET**, and then type **Click to reset form** as the **TOOL TIP**.
5. Leave the other settings in the **GENERAL** tab unchanged.
6. Click the **APPEARANCE** tab and set the following:
 Click on the swatch to the right of **BORDER COLOR** and choose the same light color as the **Print** button.
 Click on the swatch to the right of **FILL COLOR** and choose a dark color, as in the **Print** button.
 From the **Line Thickness** drop-down menu, choose **Medium**.
 From the **Line Style** drop-down menu, choose **Beveled**.
 From the **Font Size** drop-down menu, choose **14**.
 Click on the swatch to the right of **TEXT COLOR** and choose the same text color as in the **Print** button.
 In the **Font** drop-down menu, choose **Arial Bold** or the font previously chosen for the **Print** button.
7. Select the **OPTIONS** tab and make the following selections:
 From the **LAYOUT** drop-down menu, choose **Label only**.
 From the **Behavior** drop-down menu, choose **Invert**.
 In the **Label** text box, type **RESET**.
8. Click the **ACTIONS** tab and choose **Mouse Up** from the **SELECT TRIGGER** drop-down menu.
 Choose **Reset a Form** from the **SELECT ACTION** choices, and click the **Add** button.
 The **RESET A FORM** window opens.
9. In the **RESET A FORM** window, confirm that all the fields on the form are selected. If necessary, click **SELECT ALL** to choose all the fields that will be reset.
 Click **OK** to close this window, then click **CLOSE** to close the **BUTTON PROPERTIES** window.

Test your form

1. Choose the **HAND** tool.
2. Starting with the **NAME** field, enter information into all the form fields, pressing the **TAB** key to move from field to field. Press **SHIFT+TAB** to move backward to the previous field. When your pointer is over an interactive form field, it changes to a **Pointing Hand** icon, an **Arrow** icon, or the **I-beam** icon, depending on the field type.
3. When finished, press the **PRINT** button to print the form.
4. To use the form again, press the **RESET** button to clear all the fields.

Defining the tabbing order of form fields

If a PDF document isn't tagged and doesn't have a specified tab order, the order in which the form fields were created determines their tabbing order. If a PDF document is tagged, the document structure determines the form fields' tabbing order.

You can use the **TAB ORDER** options in the **PAGE PROPERTIES** to set the tab order of form fields by the row order, column order, or document structure. This method is useful only if the form fields are organized in rows or columns, or if the form fields are tagged.

Right-click on the page thumbnail and choose **TAB ORDER**. See at the right two pictures of the **TAB ORDER** dialog showing one with **DOCUMENT STRUCTURE** selected and the other with **UNSPECIFIED** selected.

If you want to manually customize the tab order with Acrobat, you can use the **SET TAB ORDER** command.

1. Choose this command: **ADVANCED > FORMS > FIELDS > SET TAB ORDER**.
2. Each form field displays a unique number that represents its tabbing order. You can choose this command only if the tab order property in the **PAGE PROPERTIES** is set to **UNSPECIFIED**.
3. To change a form field's tab number, click the field.

Finish and save your form

Review your form and make sure that you have created one that is easy for the user to understand.

Always remember to use the **SAVE AS** command when you have finished working in *Adobe Acrobat*. Try to use short, meaningful names for your PDF files.

