Acrobat PDF Forms - Part 3

This lesson guides you through the creation of an order form. You will be provided with a Word document named Order Form. You will convert this document to an Adobe Acrobat (PDF) document from either Word 2003 or Word 2007 (refer to Part 2 in this series for instructions for converting Word documents to PDF). Part of the form field outlines will be provided by the Word file that has had a small table inserted. In other areas, you will create form fields with outlines. Most of the form fields will be text, and you will be guided through duplicating fields, validating text/numeric fields, and calculating numeric fields.

**Create the first text field**

1. With your form document opened in Adobe Acrobat 7 Professional, show the Forms toolbar.
2. Choose the Text Field tool, and move your cursor to the first column under the heading **Item Description**.
3. Position the cursor at the upper left of the top empty rectangle, click and drag the cursor to the bottom right of the cell.
4. The Text Properties dialog appears with the General tab open.
5. Name the text field **Item** and type the tool tip: "Type item description."
6. Choose the Appearance tab.
7. Do not set any Borders or Colors.
8. Set the Font size at 10 and click the close button.

**Duplicate fields**

1. Click to select the text form field you have just created.
2. Right-click (Windows) or Control-click (Mac) the form field.
3. On the drop-down context menu, select Create Multiple Copies.
4. The Multiple Fields dialog displays.
5. If necessary, click the Preview checkbox to view the duplicate fields.
6. For Copy selected fields down, enter 10.
7. For Copy selected fields across, enter 1.
8. You can use the Overall Size (All Fields) to adjust the amount of space between each field affected by the duplication. Additionally, use the Overall Position (All Fields) to move the field being duplicated and all the copies. If all the fields are either too high or too low within each cell, click the Down or Up button to move the fields on the page. Click the OK button to close the window.
8. Double-click the original form field that was duplicated, and click the General tab. Note that Adobe Acrobat added a period and number following the form field name. Click the Close button.

See above a screen picture of the duplicated fields: Item Description, Price Each, Quantity, and Item Total.

See at right, the duplicate fields dialog, showing the settings that were used to duplicate the fields under Item Description.

When fields are duplicated using this method, Adobe Acrobat automatically renames each field so that it is unique by adding a consecutive number at the end of each form field name. It is not, therefore necessary to rename each of the duplicate fields.

**Validating Text/Numeric Fields**

To ensure that correct information is entered into form fields, use Acrobat's field validation feature. For example, if a response needs to be a number with a value between 10 and 20, you can restrict entries to numbers within this range. Here you will limit the price of each item to no more than $2,000.

1. From the Forms toolbar, select the Text Field tool.
2. In the Order Form table, move your cursor to the second column from the left with the heading of Price Each.
3. Position the crosshairs at the upper left corner of the first empty cell at the top of this column. Click and drag downward and to the right to create a field that fills the cell.
4. On the General tab of the Text Field Properties window, for Name, enter Price and for Tooltip, enter Price per item.
5. Click the Appearance tab, and for font size, choose 10.
6. Click the Options tab, and for Alignment, choose Center.
7. Click the **Format** tab and set the following:
   - For **select format category**, choose **Number**.
   - For **decimal places**, choose 2.
   - For **separator style**, choose 1,234.56 (the default).
   - For **currency symbol**, choose **dollar ($)**.

8. Click the **validate** tab, then choose the radio button to select **field value is in range**. In the range fields, enter a value of 0 into the **from field** and 2000 for the **to field**.

9. Click the **Close** button to close the **text field properties** window.

10. Right-click (Windows) or Control-click (Mac) the text field (Price) you have just created, and follow the previous instructions for creating multiple copies of this field.

### Another numeric field (Quantity)

Formatting is a method for making sure that data entered into form fields is appropriate. By specifying a field’s contents as a number, you can prevent users from entering letters or any other characters.

1. If necessary, select the **text field** tool.
2. Move the cursor to the third column, with the heading **Quantity**.
3. Create the top form field and on the General Tab name it **Quantity**.
4. For the Tooltip, enter “Type the quantity.”
5. On the **appearance** tab, for font size, choose 10.
6. Click the **options** tab, for **alignment**, choose **Center**, or you may prefer another alignment setting.
7. Click the **format** tab, and set the following:
   - For **select format category**, choose **Number**
   - For **decimal places**, choose 0.
   - For **separator style**, choose 1,234.56.
   - For **currency symbol**, choose **none**.
8. Duplicate this field down the column, as previously instructed.

### Calculating Numeric Fields

1. With the **text field** tool in the top cell under **item total**, draw from the upper left to lower right to create a text field.
2. In the **general** tab, name the field **Total**.
3. For the **tooltip**, type “This field will be calculated.”
4. In the **appearance** tab, set the font size at 10.
5. Click the **options** tab, for **alignment**, choose **center**, or you may prefer another alignment setting.
6. On the **format** tab, set the following:
   - For **select format category**, choose **Number**
   - For **decimal places**, choose 2.
   - For **separator style**, choose 1,234.56.
   - For **currency symbol**, choose **dollar sign**.
7. Click the **calculate** tab and set the following:
   - Select the** Value is (the radio button)**
   - Choose **product (x)** of the following fields
8. Press the **pick** button. The **field selection** window displays a listing of fields that can be used in the calculation. In the **field selection** window, check the boxes to the left of **Price.0** and **Quantity.0**.
9. Click the **OK** button to close the **field selection** window.
10. Click the **Close** button to close the **text field properties** window.
11. Duplicate this field, as previously explained.
Note: When you duplicate this field, the name of the field will be changed, as it was in the previous columns. The top field will be named Total.0, and so on down the column. You will now have to correct the calculations on all the total fields except the first one.

**Correct the calculations in all the duplicate fields**

1. If necessary, select the **Text Field Tool**.
2. Double-click to open the Total.1 field (or Right+Click (WIN) or Control+Click (MAC) and select **Properties** on the **Context** menu).
3. If necessary, click the **Calculate** tab.
4. Click **Pick**.
5. In **Field Selection** window, click the box to the left of Price.1 and box to the left of Quantity.1. Click to remove the checks at the left of Price.0 and Quantity.0 and click **OK**.
6. In the Total.2 field, double-click to open the Text Properties dialog, and if necessary click on the **Calculate** tab.
7. Click **Pick**.
8. In the **Field Selection** window, delete the selections in the boxes at the left of Price.0 and Quantity.0 and click in the boxes of Price.2 and Quantity.2. In the illustration at right, see the Field Selection window in which the Price.3 and Quantity.3 fields have been checked.
9. Continue down the column, making sure that each total field includes a calculation that is the product of the Price and Quantity in its row. For example, the Total.3 field should include a calculation of the product of Price.3 and Quantity.3, and so on, ending with the Total.10 field.
10. Look at the screen picture of the Calculate tab at the right that shows the calculation of the product of Price.10 and Quantity.10. Do not format the last field in the Item Total column.
Format the Order Total field.

1. With the Text Field Tool, double-click to open the Order Total field (or Right-click (WIN) or Control-Click (MAC) the field and choose Properties on the CONTEXT menu).
2. Click the Calculate tab.
3. Look at the illustration at the right.
4. Select the Value is the radio button and choose sum (+) of the following fields.
5. Click Pick button.
6. The Field Selection window displays a listing of all the Item Total fields. See the Calculate tab at the right showing the settings.
7. When finished, click the Close button.

Completing the form fields

Using the Text Form Field Tool, draw fields following Name, Street, City, State, Zip, Country, Daytime Phone, Email, Type of Payment, Card Number, and Expiration Date.

These fields will have a solid border outline around them. On the Appearance tab: Set a color for the border, set line thickness at thin and line style at solid.

Using the Button tool, create a Print button and a Reset button in the lower right area of the form.

If you can’t remember how to create these buttons, please refer to the PDF Forms Part 2 lesson guide, pages 3 and 4.
Define Tab Order

If a PDF document is not 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, column, or document structure. If your form is not set up in rows or columns, then you can manually customize the tab order by using the Set Tab Order command.

Set Tab Order by Row

1. Notice in the Order Form that the top section is organized by Row. You will set the tab order by row for that section of the form.
2. See above right, a picture of the Navigation tab with the page showing.
3. If the Navigation pane is not showing, pull down the View menu and select the Navigation tab, then in the sub-menu, select Pages.
4. With the Page selected in the Navigation tab, click the Down arrow at the right of Options.
6. On the Tab Order dialog, select Row Order.
7. Your form now has a tab order by row order, which is fine for the top section. However, for the bottom area of the form, the row order is not what you want.

Set Tab Order for the bottom portion of the form

1. Open Page Properties.
2. In the Tab Order dialog, select Unspecified, then click Close.
3. In Adobe Acrobat, click Advanced, then Forms, then Edit Fillable Forms.
4. A dialog displays, and you will select Acrobat’s Forms Tools.
5. Choose Advanced, then Forms, then Fields, and then Set Tab Order.
6. Look at the tab order. The top section has the tab order by row. Leave that section alone.
7. Click in the Name field with your cursor.
8. Click and continue to click until the number in that field is one number higher than the last form number in the Order Total field.
9. Click in the Street field, and click until the number in that field is one number higher than the previous.
10. Continue down the lower left fields and then the three fields at the lower right, incriminating the form field tab set numbers.
11. When finished, save the form.
**Fill out the Order Form**

If a PDF form contains interactive form fields, you can fill in the form with the Basic toolbar’s Hand tool. If you have successfully set the tab order, then you can advance forward through the form using the Tab button. You can go backward, using the Shift+Tab keys. If you want to select a certain form field, use the Hand tool pointer and point to the form field and click.

If you want to make form fields easier to identify, you may want to display a light blue color in the background of all form fields. If so, select Highlight Fields in the Document Message Bar.

When users opens forms containing interactive form fields in *Acrobat Reader*, they can fill in the forms and then print them. They cannot save them or modify them. The *Adobe Reader* can be downloaded from the Adobe web site free of charge.

Users must open the *Adobe Acrobat* form using the *Adobe Acrobat* program (not the *Reader*) in order to save the form. Such users may or may not be able to modify the form, depending on the document security settings set by the creator of the form.