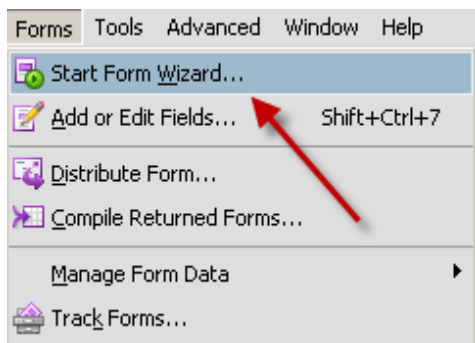


Creating Acrobat Forms –Acrobat 9 Professional

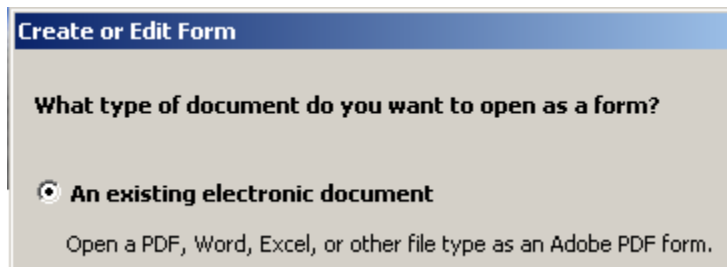
Acrobat forms typically have an origin from another program, like Word, Illustrator, Publisher etc. Doesn't matter. You design the form in another application bring it into acrobat and then modify it so that it become interactive by adding text fields, pop up data, etc.

In this lesson, we will save a form as a PDF from a word document. Then we will open up the document in Acrobat.

Once in Acrobat, Go to the Forms Tab and Select Start Form Wizard



The next obvious option to select is from an existing document

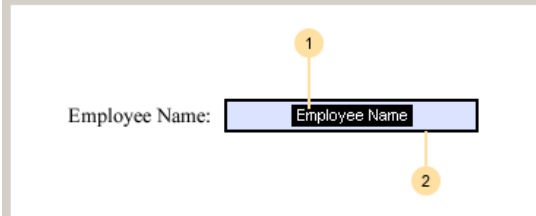


Select the option of use the current document. Acrobat will go through the form and try to determine which items need a field and assign it.

This is not a perfect Wizard so you will get this default notification

During creation, Acrobat may have missed some fields or created extraneous fields.

Please validate the fields and field names on your form. You can click Add New Field on the toolbar to add more fields and right-click on the form to edit or delete fields.



Legend: 1 = Field Name, 2 = Field

The new form generated is called an Acroform. Acrobat generated form fields where it thinks they should be. You do not have to use the wizard, Instead you can also just go to Forms, Add or Edit fields. It will then ask you if you want Acrobat to detect the fields and you have a choice yes or no. You have to check the field names and make sure they are all ok and that they will function the way you want then to.

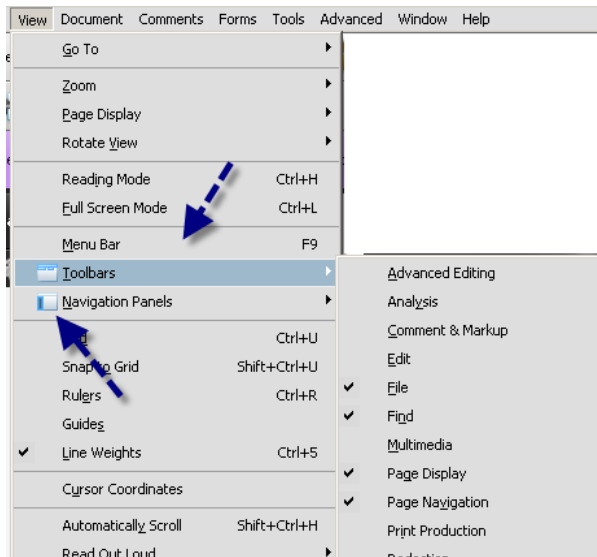
When you are in Form Editing mode, all of your tool bars and navigation bars disappear.

There may be some fields that have to be deleted. You don't have to do all the grunt work with acrobat. It does it for you.

Note – If you loose your toolbar, you must exit form editing mode by

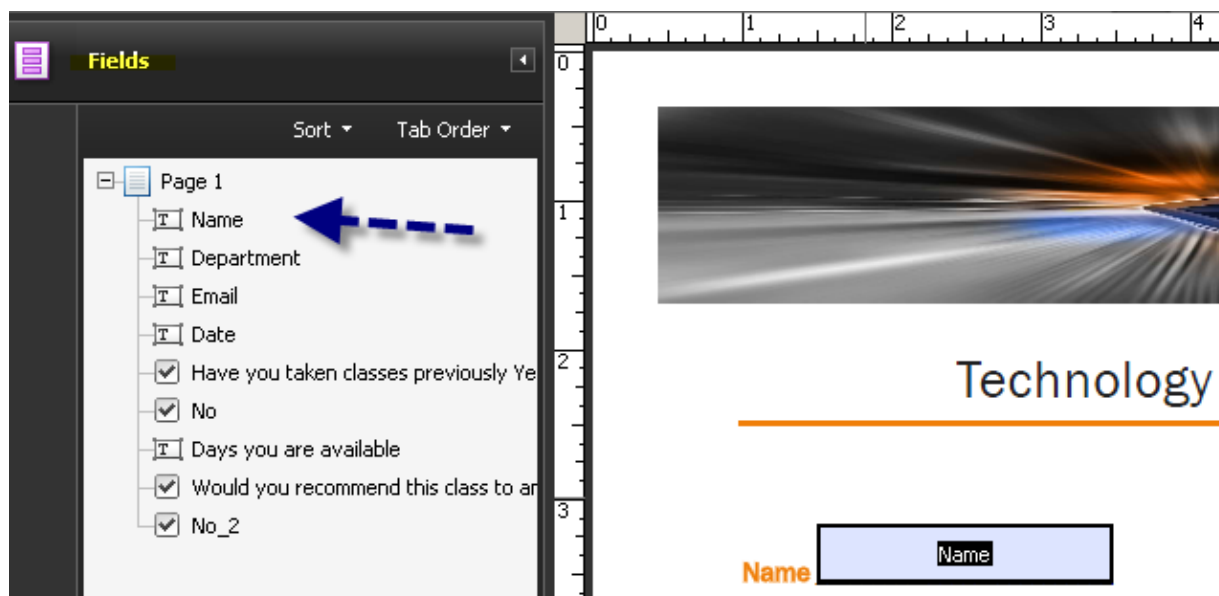
going to  **at the top right of the page.**

Then go to View Tool bars



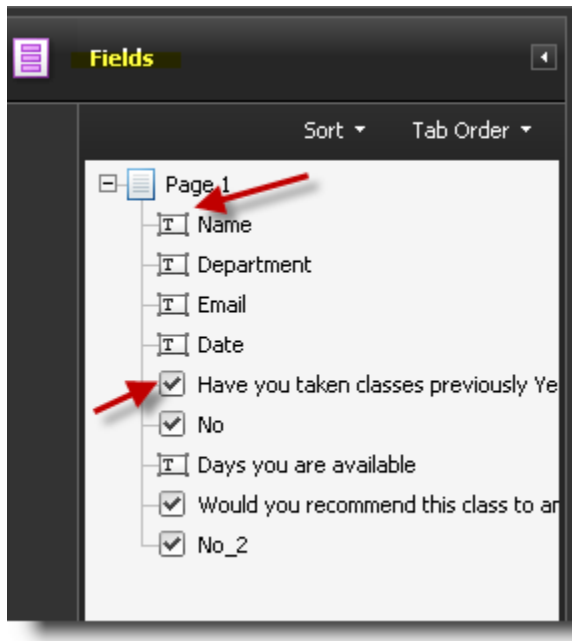
Note that you can also determine if you want the Navigation panels to show as well.

When you are in forms editing mode, and you click on field, you will see the fields navigational panel on the left side of the screen.



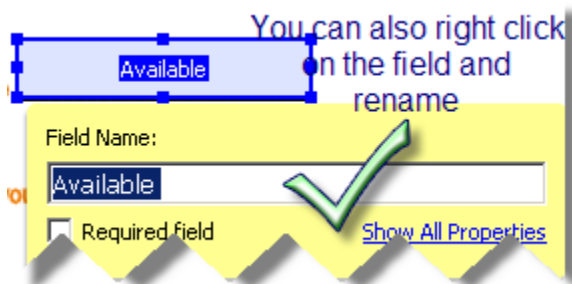
The fields are sorted by page number. The little icons display which kind of a field it is

The example below shows a text box field and a check box field.



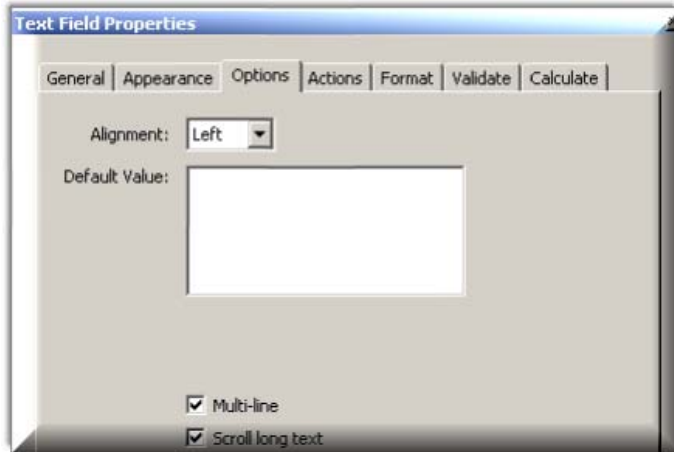
Clicking on a field on the left and it will highlight the field on the right.

You can rename the field by just right clicking it in the Navigation panel or in the field itself. You can resize the field or change its properties.



Click on Show all properties to do that.

There are many tabs to the properties. Click on each one to see various options. When you have a text field that a user will enter a lot of text, be sure and click on Multi-line on the Options tab of the Text field properties.



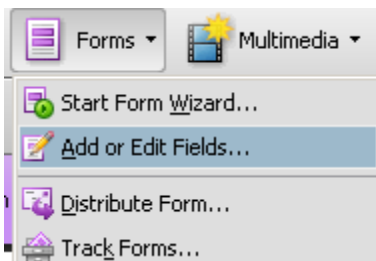
Part 2 Creating Forms without using the Wizard. From Scratch

Best Practices in using forms

Start again with any pdf and go to Forms, Add or Edit Fields. Acrobat will then ask you if you want Acrobat to detect the fields. In this case you are building from scratch so select No.

This will automatically put you into form editing mode and you can begin adding fields yourself.

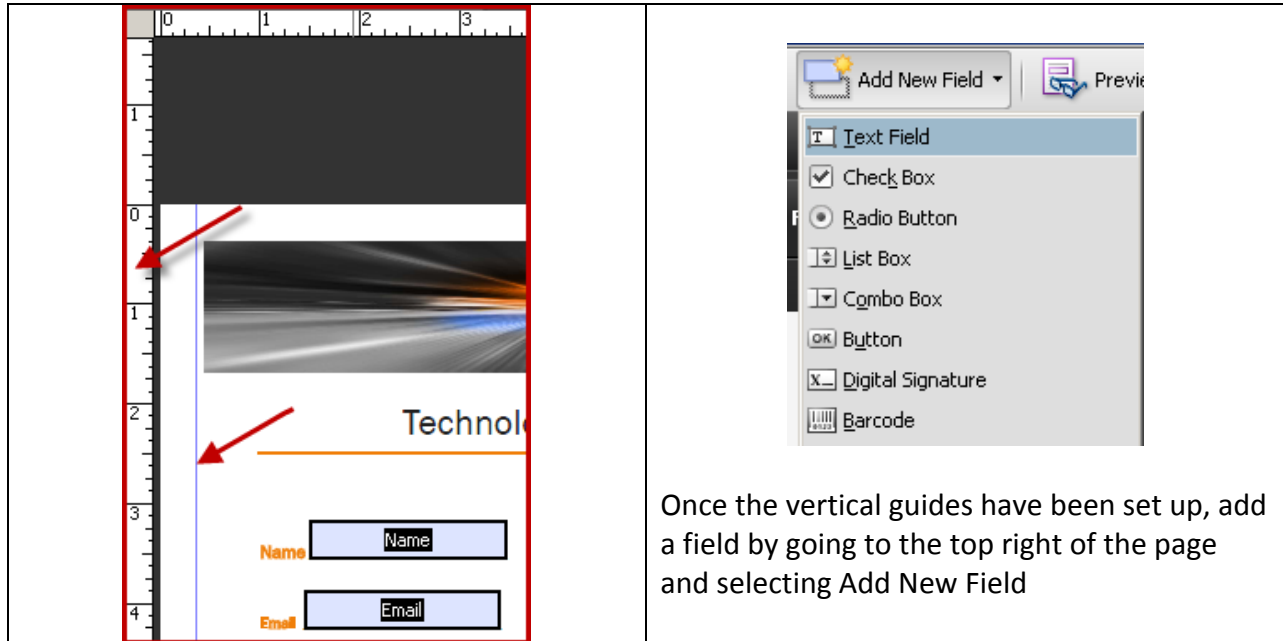
Using the forms icon is the same as using the standard toolbar



Creating Text Fields

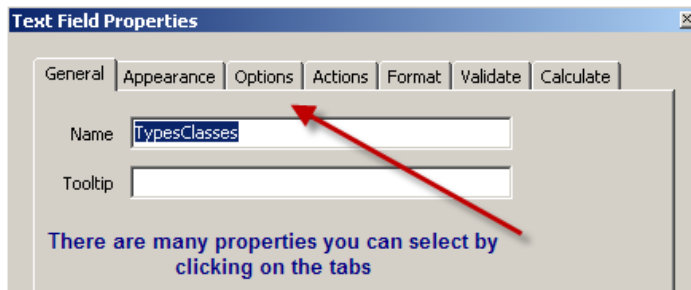
You can create many types of fields with Acrobat. When you add text fields to the document, it is best to do so with a Vertical guide so that there is alignment.

In order to create the Vertical guide, click on ctrl click or shift click on the ruler area and drag a line across where you need to put the guide. See the example below.



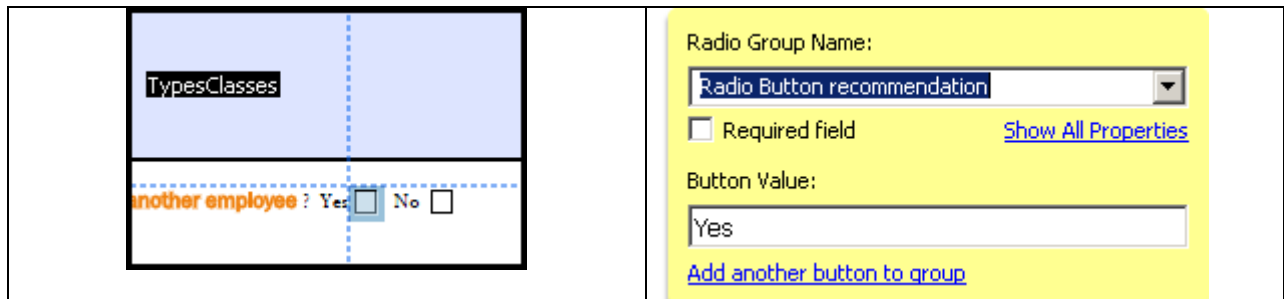
Once the vertical guides have been set up, add a field by going to the top right of the page and selecting Add New Field

Select Text Field and you can align the field with the ruler. The text field appears and you can select Show all Properties. You can also see all properties by just double clicking on a field.

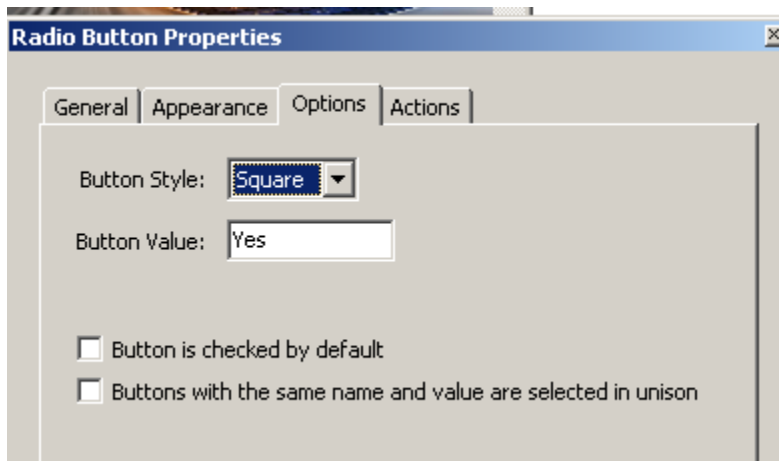


Radio Buttons-Form start Radio

When you add Radio Buttons –For instance yes or no, or select from a group of 5 options, you often want to **only allow 1 selection of 5**. In order to do that, go to add New Field and select Radio Button. The cross hairs will show up and you can overlay it on top of a box you have created for the option.

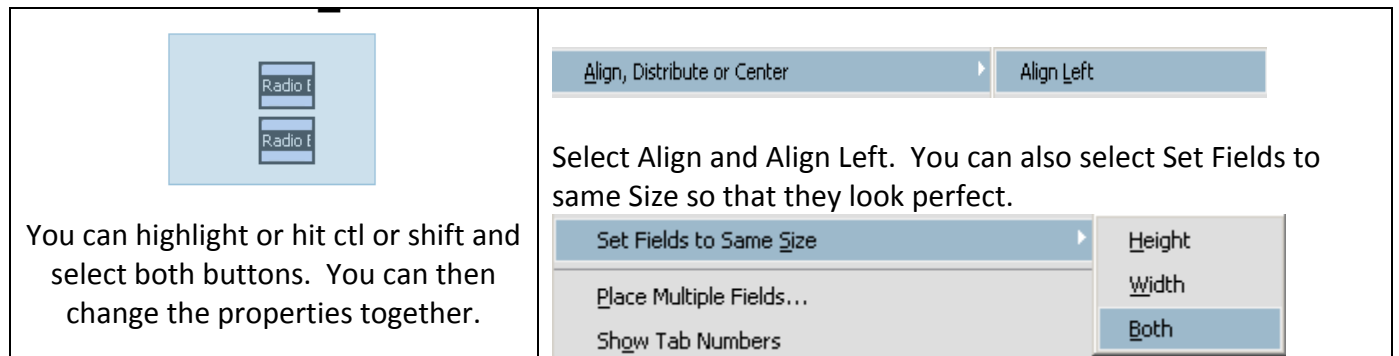


The Radio Button notice on the yellow descriptor has a GROUP name. If you name all of the associated radio buttons with the same group name, then they will stay together and also the user will only be allowed to select one option. Once you add one radio button, the bottom of the Add another button to group can be clicked on you will have another one added to the group. Notice that you must change the name of the button value. The properties of the Radio button can be modified with the tabs.



Once you have the buttons on the form, you will want to align them.

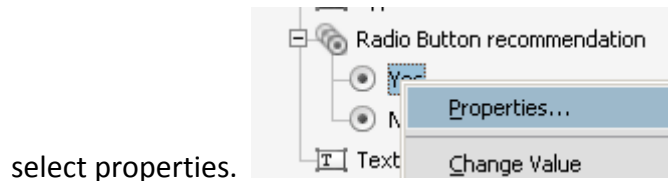
Highlight both fields together and then Right click



You can highlight or hit **ctl** or **shift** and select both buttons. You can then change the properties together.

Select **Align** and **Align Left**. You can also select **Set Fields to same Size** so that they look perfect.

You can view in the navigation pane the Radio Button group. Right click on the button and



select properties.

This way you will not accidentally move or resize various radio buttons.

Using Checkboxes-Form start checkbox

Check boxes are useful when you have to select multiple options; instead of radio buttons which are in a group.

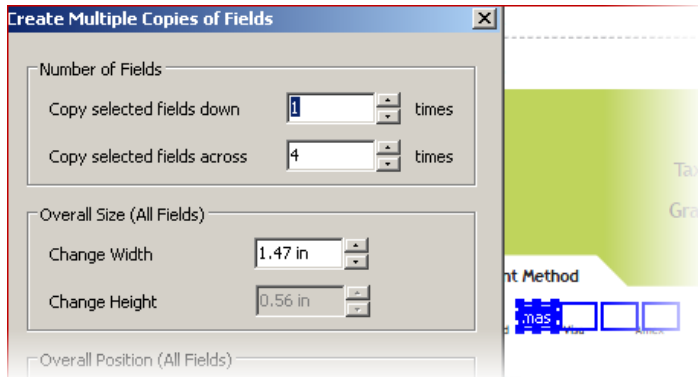
Multiple Fields-When you create check boxes, you sometimes need to have multiple check boxes. You can create 1 check box first and then, hold the **ctl** key and drag to create another check box. You can then rename the check box in the navigation field on the right side of the page.

The other way you can add Multiple fields is by right clicking on the first check box and select



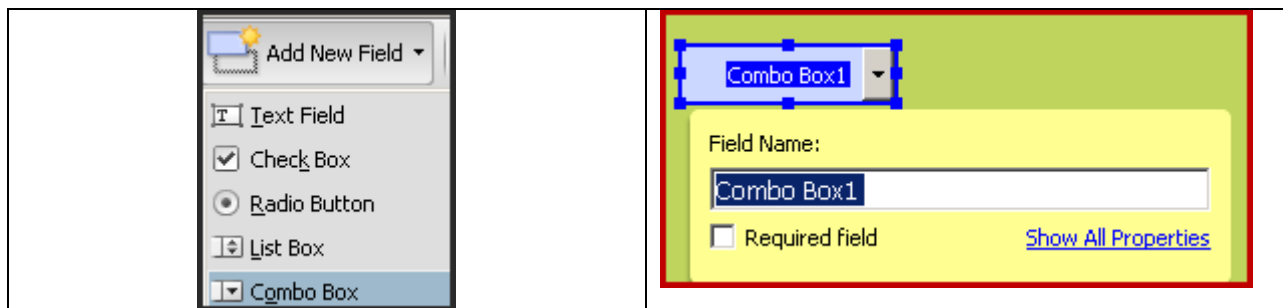
Place Multiple Fields.

This will bring up a menu asking you to set the number of fields down and across. Changing the width will also increase the spacing between the boxes.



Combo boxes—Form start combo for sample

Go to Add New Field and select Combo box—A combo box is a pop up field where you choose 1 item. A list box on the other hand allows you to choose as many as you like and you see the entire menu.

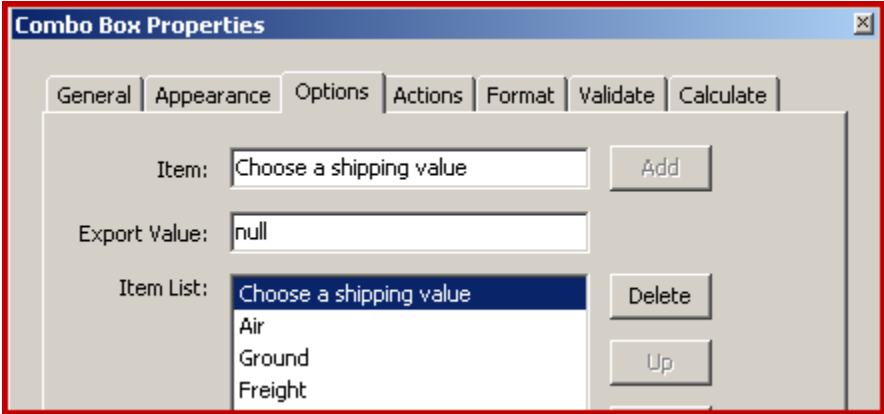


Once you place the combo box on your form, choose show all properties. Cycle through the properties tabs from left to right. In the appearance choose a border color line thickness and style. Be sure and make the font fixed.

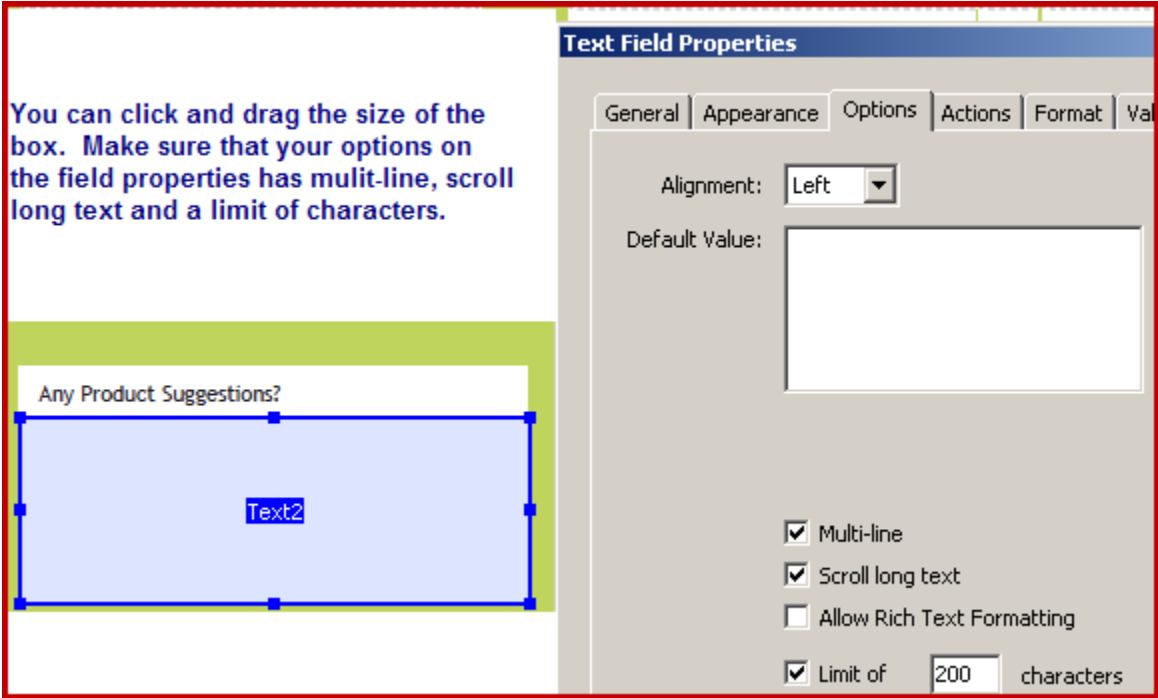
In the options box you have your item and export value. The export value is what data will be sent to either a database or emailed to you. The item is the text that appears in the pop up menu.

Whatever you put in the Item area tends to be the first thing you put in the pop up. Example would be to put Choose a shipping value and the put null for the export value. Continue to add items to the menu.

Before you close the properties box, click on the item you want to show up in the box when the user sees it.

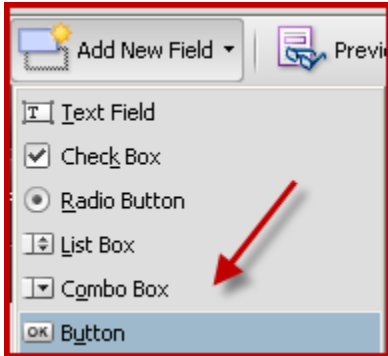


Creating a large text area to type in a lot of text—Forms text area

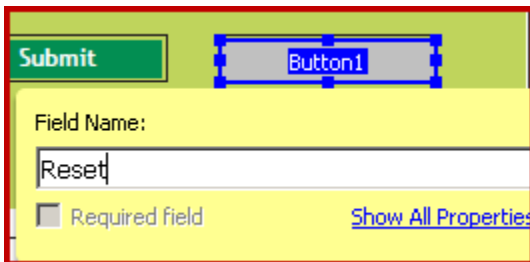


Reset Buttons Form start Reset– When you create a Reset button, you have to add an action to it. On the Reset button you may have to change the properties if you already had a button created so that the color is transparent. B

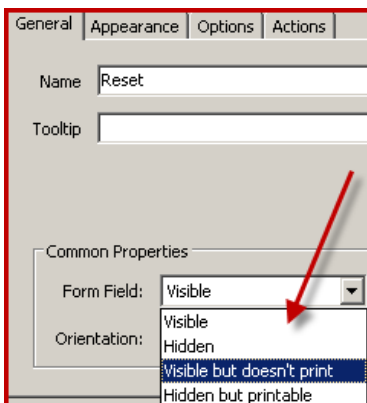
You must first go to Add New Field-Select the OK button



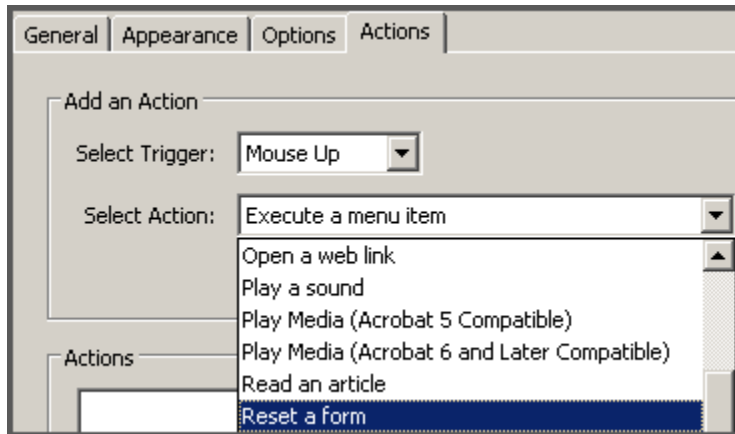
Click and drag over the button and then click show all properties



A good option to select in the properties of the Reset button is to make it visible but not so that it will print.



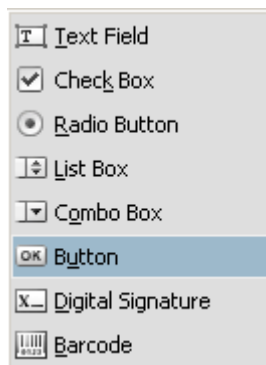
When the end user performs an action something occurs. The Actions should have Mouse Up and Reset the form. Do not use Mouse enter for a trigger.



Click on Add after you select the Action. Preview the page and then test it out.

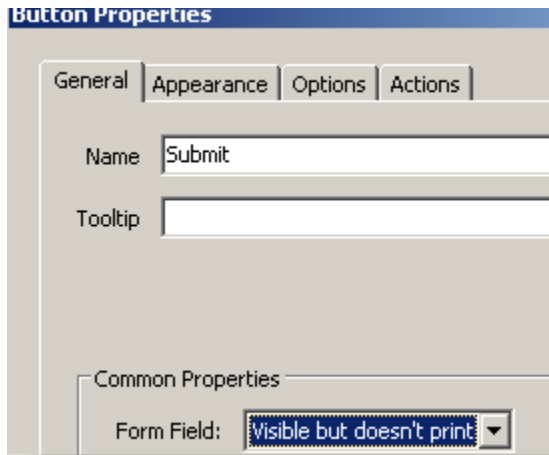
Submit button Form Field Submit--is used for submitting forms. –Form field submit.

Like the Reset form field, the submit button can be added the same way. You can right click anywhere on the form and select button

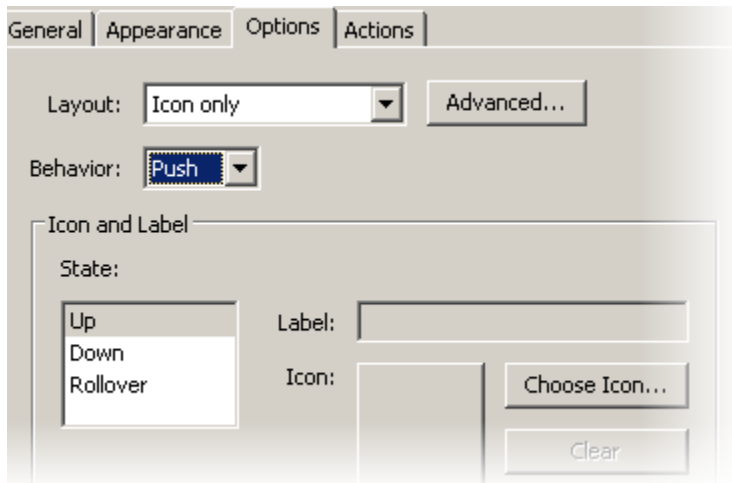


Draw the button with the Ctrl click drag

The General properties should have the name of the button and the common properties should select Visible but does not print.

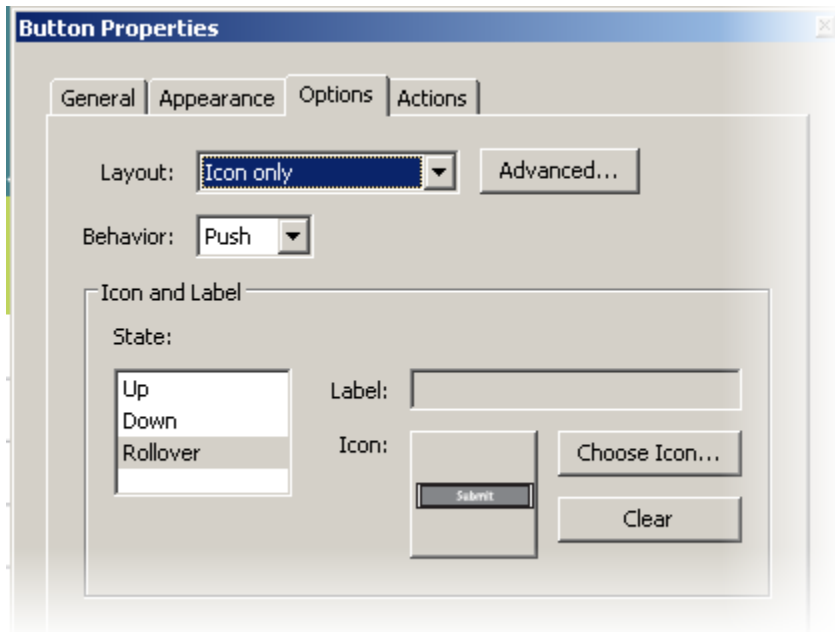


In the appearance, remove the fill color because we are going to add a picture. Then select the options tab. You should select layout and Push for the behavior. You will be able to add a picture for each state of the Mouse. Up Down or Rollover. Up is when you first look at the form. Down is when you click on it and Rollover is when you roll the mouse over.



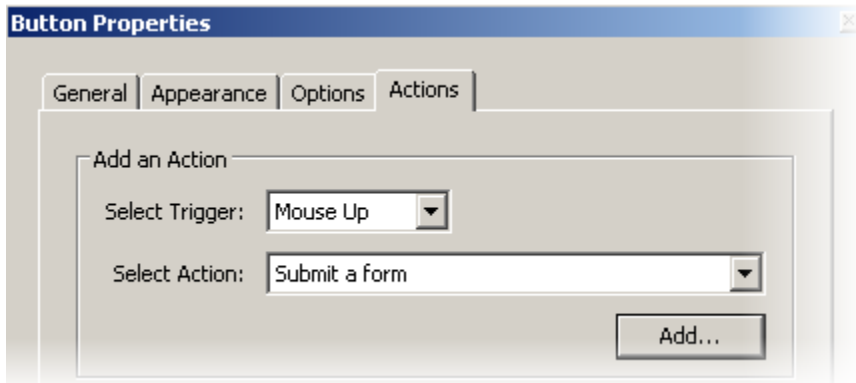
Select Choose icon and then go to the picture files. Submit and Submit over. The pictures are located in the Exercise files 02 edit buttons.

For Push Up choose the Submit icon image

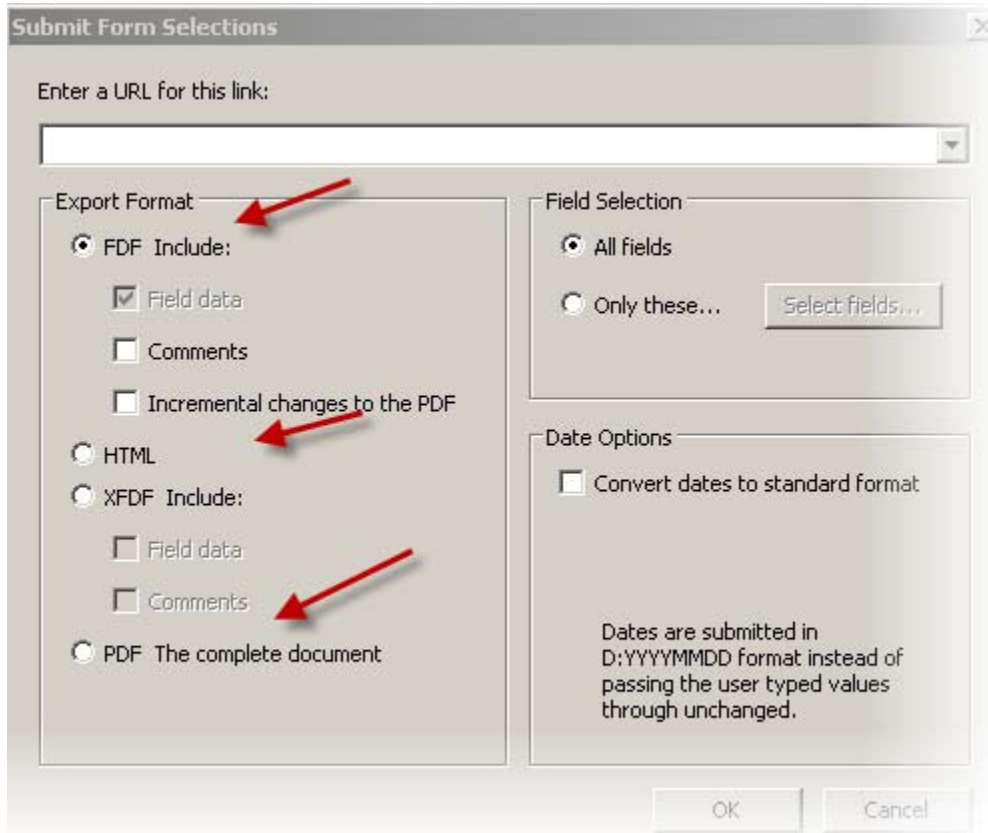


Then use the icon submit over for the state of Roll over. If you click preview now when you hover over with the mouse it swaps out the picture and changes it.

Now you have to add the action. The action is submit a form. Then select ADD



A box will populate asking you how you want the information to be transmitted. What file format do you want to send the data in. You can either email it to someone or send it to a web server



To simply mail it to someone, you use a mail to protocol

Mail To protocols

<mailto:user@example.com?cc=user2@saddleback.edu>

mailto:user@example.com?subject=Message Title&body=Message Content"

Your options for Exporting the data are FDF—Form Data Format—FDF just sends the data without the entire pdf form so it is much smaller

HTML is if you are going to send it off to a web server.

XFDF is an xml version of FDF

PDF-sends the entire pdf file.

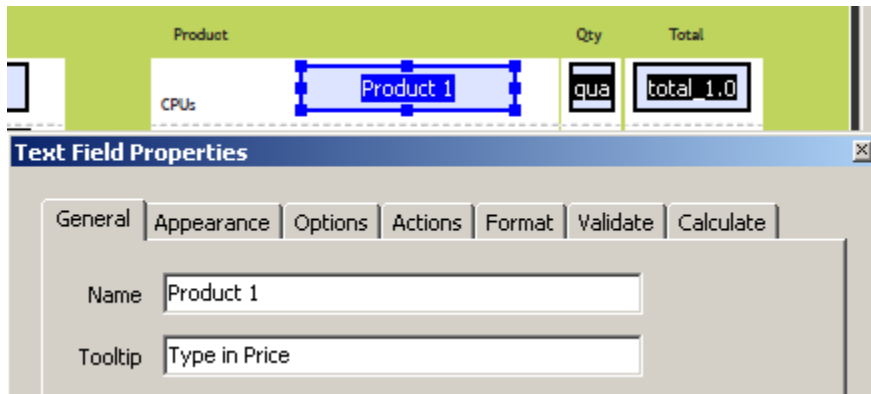
We will send the whole pdf file. Click on ok and test.

Click on Preview and test the button. The first time a user tries to submit, it will ask which best describes their email. This is an enhanced feature.

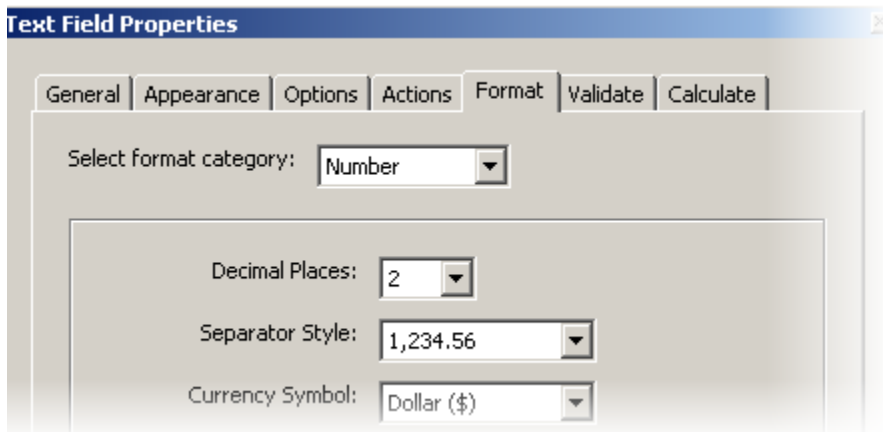
This is one of the simple ways but if you have a lot of users, it is best to send to a database.

Simple calculations-form calculate pdf

Calculations are very similar to Excel – double click on the Product field and rename it to Product 1



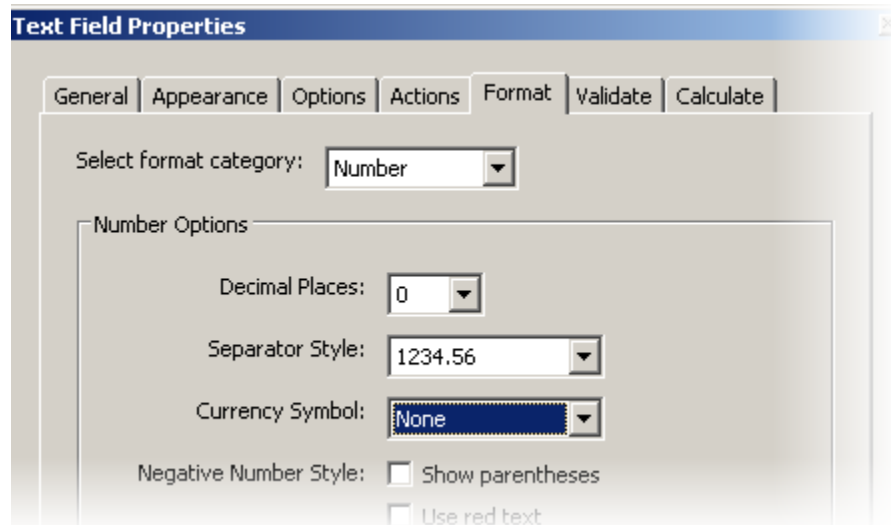
Click over to Format and make sure the category is Number



You can use validate if you want something to be in a certain range.

The calculate field is where you go to add in the calculation properties.

When you change just want the user to enter a qty, the format should be as follows



Select Value is the Sum or Product of and then select Pick and click on the items

