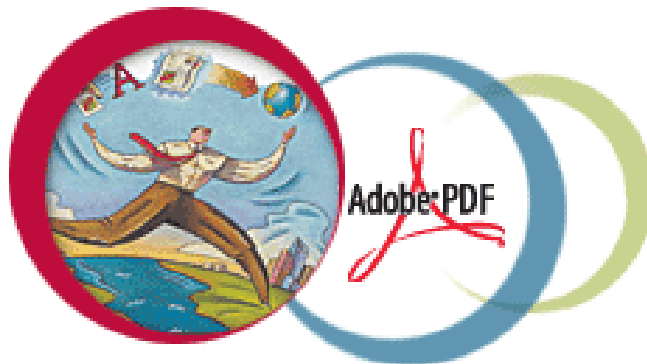




Adobe Acrobat Forms



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Adobe Acrobat Professional 6.0 Forms

Adobe Acrobat Professional 6.0 Forms	5
Creating forms	5
Form Fields	6
Add Form Fields to the .pdf document	6
General Tab.....	6
Appearance Tab	7
Options Tab.....	7
Actions Tab.....	8
Format Tab.....	9
Validate Tab.....	9
Calculate Tab	10
Preferences	10
Form Field Characteristics.....	11
Creating multiples.....	12
Positioning and Aligning fields	12
Selecting Fields.....	12



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Adobe Acrobat Professional 6.0 Forms

Creating forms

One way to share forms across different platforms is to create them in Adobe Acrobat Professional.

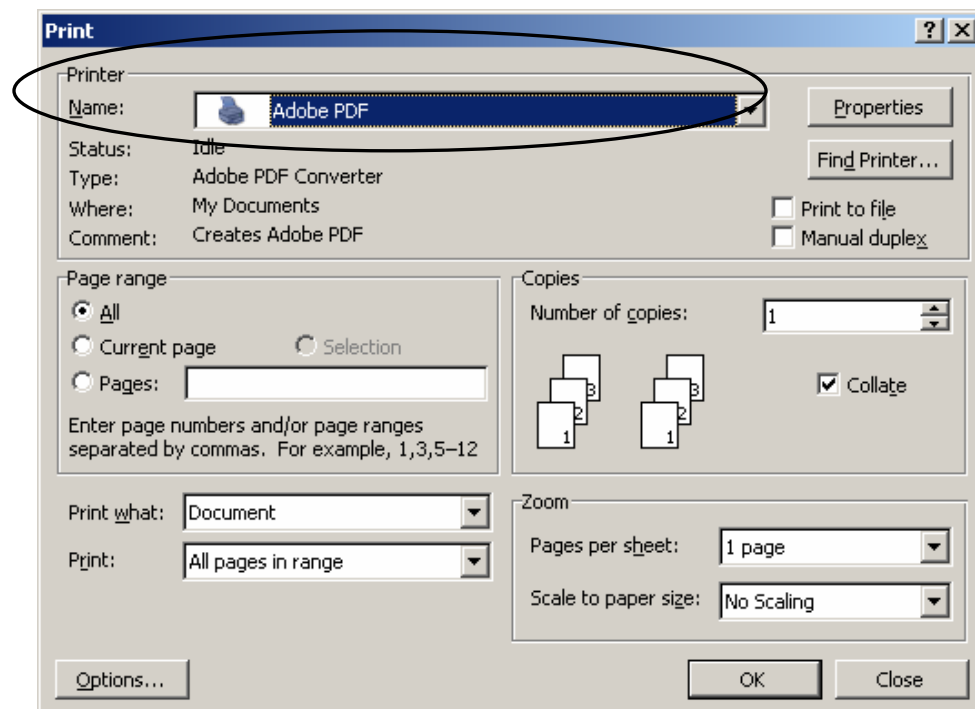
Once the static items of the form are created in a word processor program or a design program, convert it to a .pdf file (Adobe portable document file) and you are ready to add form fields.

If your form has been created in MS Word, save as a .doc file in the same folder that you plan on saving your .pdf file. This will give you a copy of the file that can be amended and altered as needed. Another way to create a form is to scan an existing document and create a .pdf file.

To convert your file, use the **Convert to Adobe** icon on the Word Toolbar



or go to the menu option **Print** > change the printer to **Adobe PDF** and click **OK**.



A new window will appear asking where to save the .pdf file. Specify where to save the file and click OK.

**Make sure all formatting and content editing is complete before you convert the document. It is much more time consuming to make changes in Acrobat and some changes cannot be made at all. The best practice is to save your original file as well as the .pdf file

Check out Microsoft Online for form templates:

<http://office.microsoft.com/en-us/results.aspx?Scope=TC&Query=forms>

Form Fields



In Acrobat the types of form fields available are:

1. 2. 3. 4. 5. 6. 7.

1. Button Tool – Initiates actions such as clear form, submit form, print form.
2. Check Box Tool – User can choose one or more options.
3. Combo Box Tool – User can choose from a list or enter custom information
4. List Box Tool – User can choose one or more choices in a list
5. Radio Button Tool – User can make a single choice among several options
6. Text Box Tool – User can type in information requested
7. Digital Signature Tool – Creates a special field to add a digital signature to the document

****If the Forms toolbar is not visible, go to the menu option **Tools > Advanced Editing > Forms > Show Forms Toolbar.******

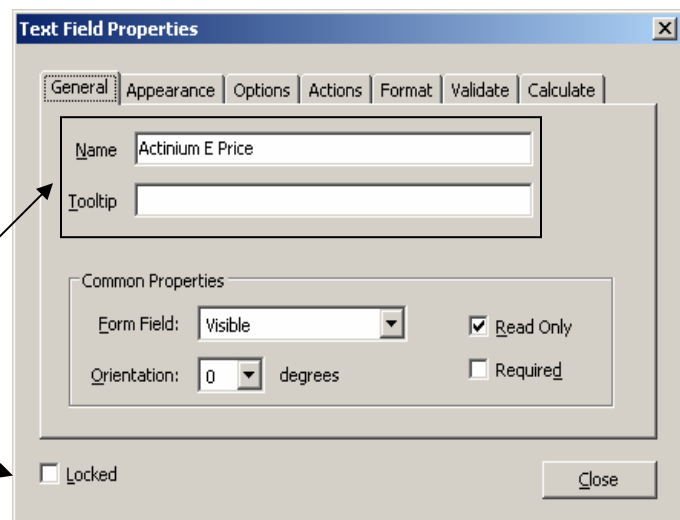
Add Form Fields to the .pdf document

To add the fields to your form document, click on the type of form field you want to add from the **Forms Toolbar**. Bring your cursor to where on the document you want the field to appear. Click and drag to “draw” the field on your document. When you are done a new **Field Properties** dialog box opens. The dialog boxes are content sensitive, so different boxes will be available or offer different options depending on the field you have chosen to add. Field Properties box offers different tabs to choose from offering different design attributes.

General Tab

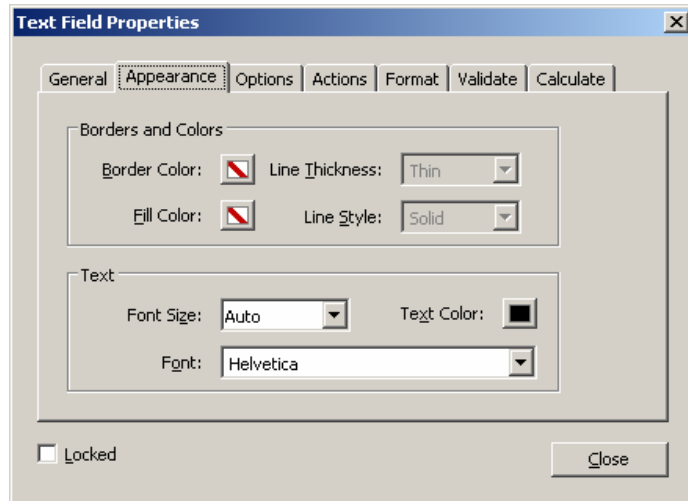
Click on the **General** tab and add a name for each field and if needed a tooltip may be added. The tooltip will pop up when the user hovers over the field. All fields have a General tab.

The **Locked** checkbox locks the field so the design attributes can not be changed unless the Locked box is unchecked.



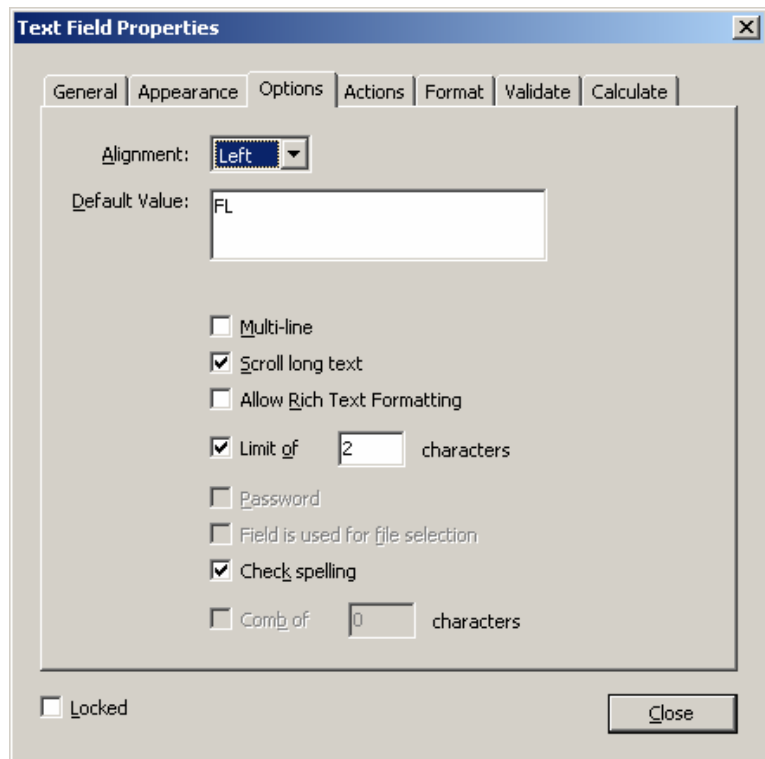
Appearance Tab

Click on the **Appearance** tab and choose how you want the field to appear on the document. Add borders and /or fill colors if desired and adjust text font and size. The appearance tab will appear for all field types.



Options Tab

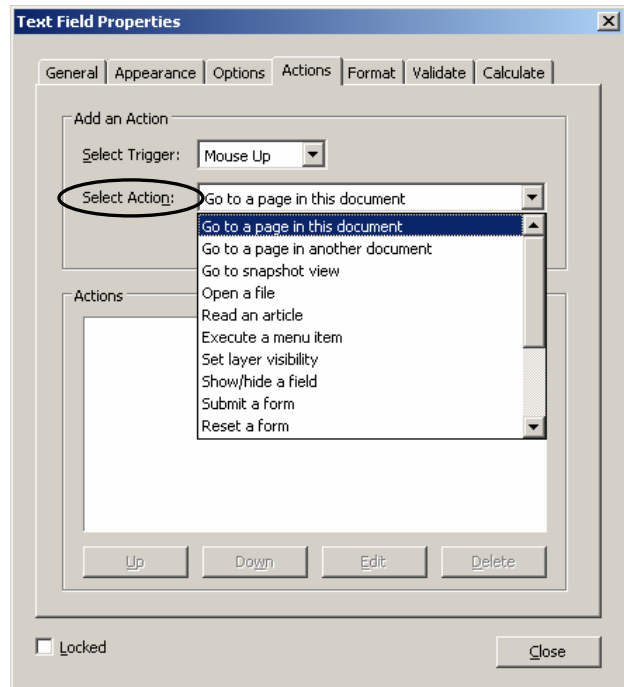
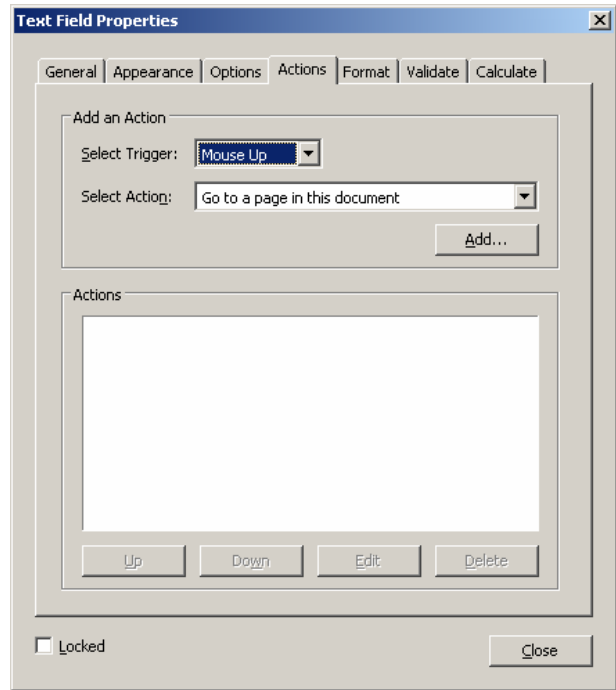
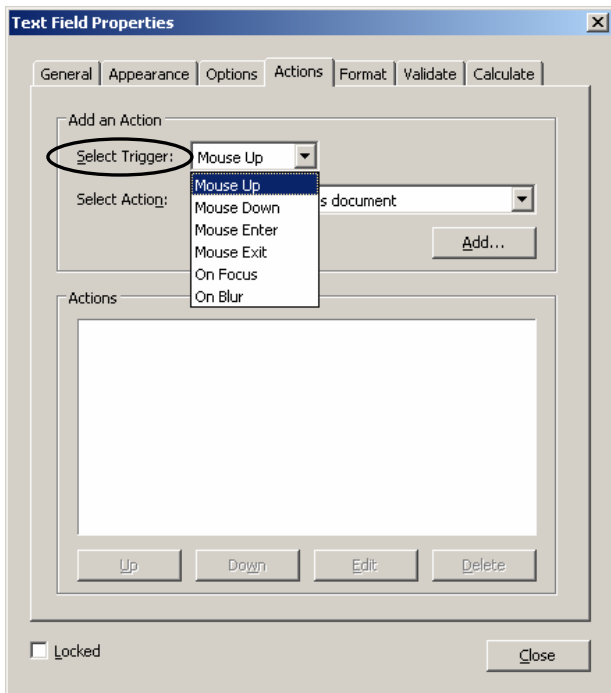
In the **Options** section, there are several choices of how your field will look or function. For example: alignment, scroll text and limiting the number of characters. If you have a text box field where the user is to add an address you may want to limit the state field to two characters allowing only the abbreviation can be entered. Your tooltip for this field may be “Enter two-letter state abbreviation”. If you think a majority of responders will enter a particular value, you may set up a **default** that will display on opening but allows for changes.



The options dialog box will change depending on the type of field you are creating.

Actions Tab

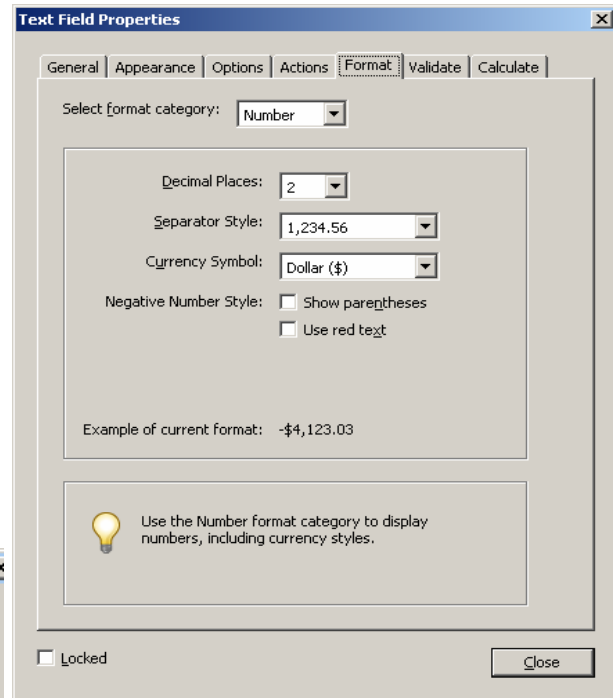
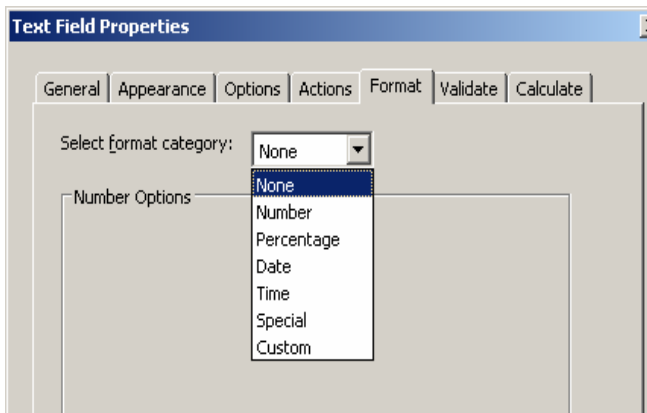
Actions can be added to form fields. An action could be opening another file or going to another page in a document. An action must have a trigger to cause the action and an action. Each of these items must be defined. Use the drop down menus to define your actions and triggers. All field types have this tab. This might be particularly useful on button fields.



Format Tab

The format category allows formatting of the information that is to be entered to be set to a specific standard. Use the drop down menus to set these formats. For example, you can set how numbers are displayed and whether a symbol is displayed. Or a date could be formatted to display a particular way or display date only or date and time.

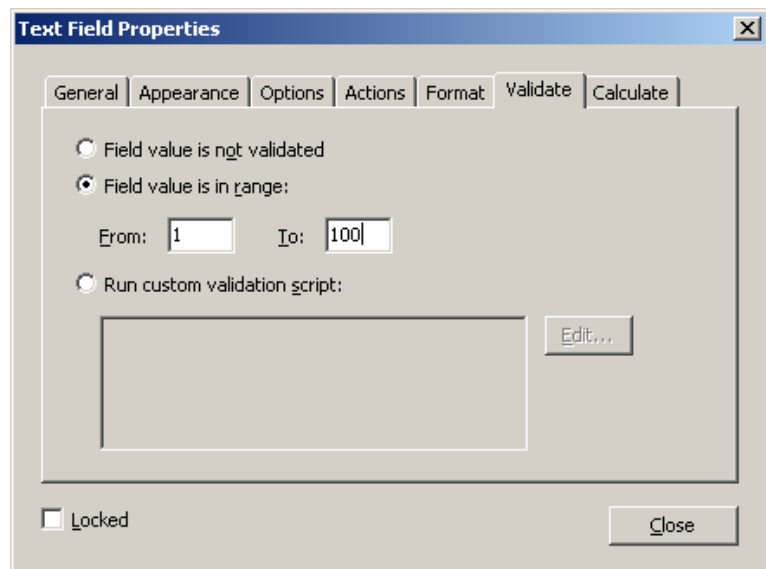
The text box field and the combo Box field will offer this tab.



Validate Tab

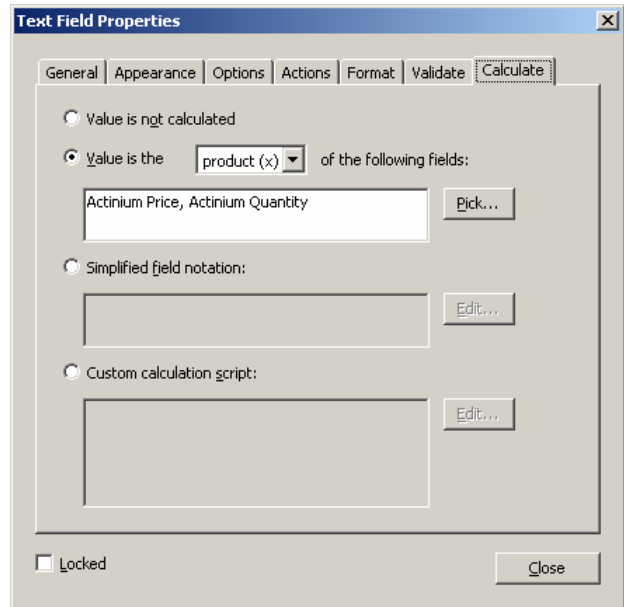
Form field information can be validated when entered by the user. If a field is to have only an amount in a certain number range, that range can be entered in the validation area. If a number out of range is entered, a dialog box will open up and tell the user to try again.

Custom validation scripts can also be created and inserted here.



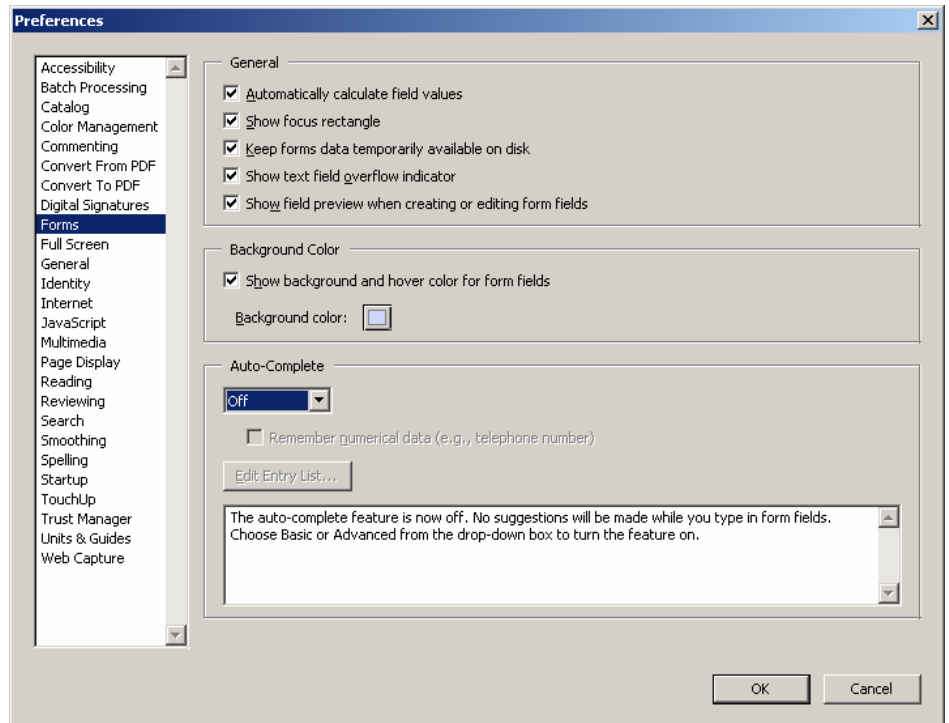
Calculate Tab

Form fields can be used to perform some mathematical calculations. For example, you can calculate total cost based on the per item cost times the entered value of the number of items. Choose the function you need and then the fields to be used.



Preferences

Some design attributes can be set up in advance in Preferences. Open the Preference dialog box by going to the menu option Edit > Preferences and choose the Forms category.



Form Field Characteristics

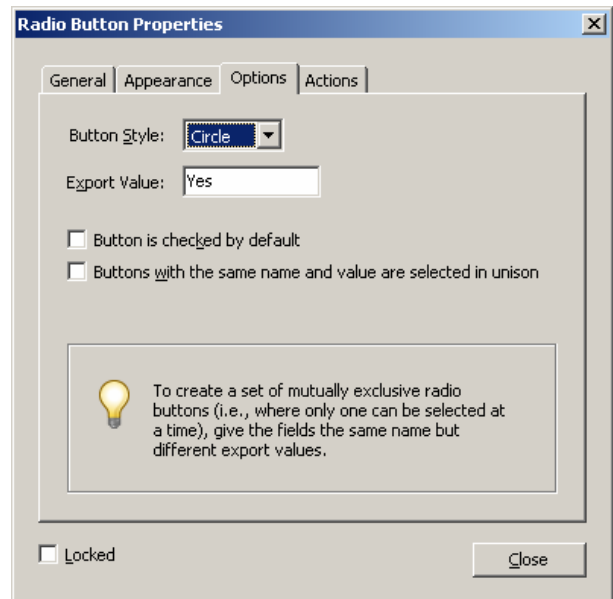
Some unique form field characteristics are:

- Radio Buttons

Normally user is allowed to choose only one in each area. To make this function properly, name all of the buttons exactly the same. An easy way to accomplish this is to copy and paste the buttons and create as many as you need. Right click the original button and choose Edit > Copy, then right click and choose Edit > Paste. The new button will paste in the middle of the document and it will need to be moved into the correct placement. When you hover your cursor over the field it will change to an arrow head. Click and drag to move the field.

Export values are used if the data is being exported to a data file or a database. Each export value needs to be different.

If you think that a particular button will be chosen by a majority of users you can set one of the buttons as the default.



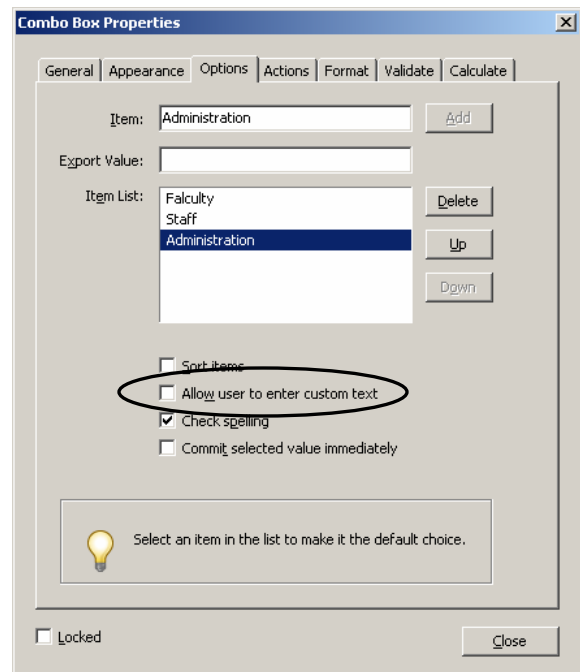
- Combo Boxes

Combo boxes give the user a choice from a list, but they also may be set to have different choices entered in manually by the user. To allow manual entries check the **Allow user to enter custom text box**.

To add items to the list, type the item in the Item text box and click on the Add button.

To make one of the items the default, select it in the Item list area.

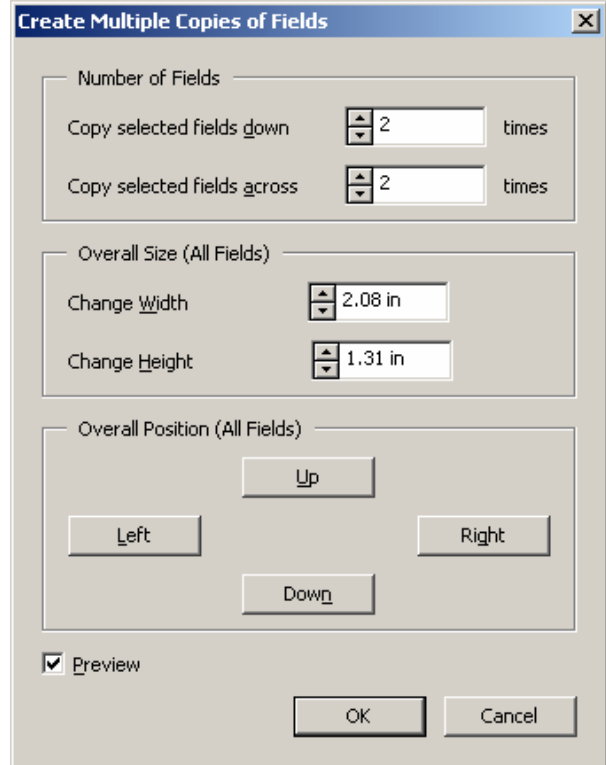
A list box is similar, but never allows the user to enter a choice manually.



Creating multiples

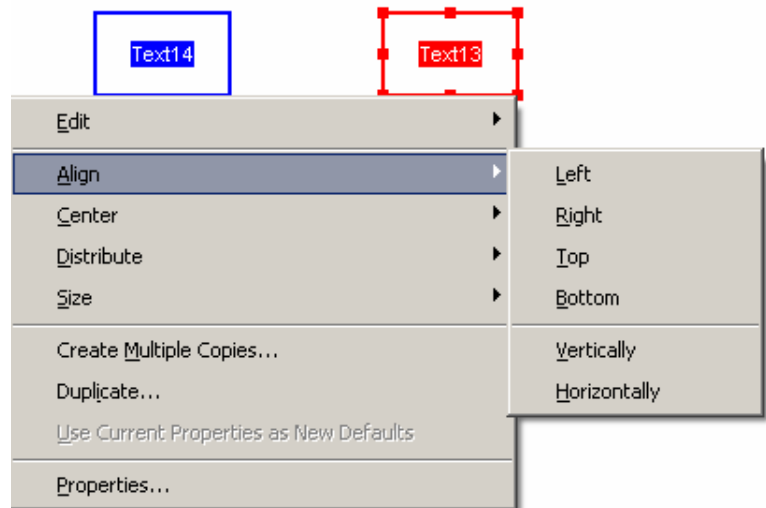
We have created duplicates by copying and pasting, but if you want to make many duplicates you can create the original field and right click and choose **Create Multiple Copies**. This would be really helpful if you were creating an order form for example. Instead of having to create and design each field individually you can make many copies all at once. Change the number of fields across and down to the number you want to create. If you check the preview box and move the dialog box out of the way, you can see the placement of the copies. To spread the fields apart increase the Width. To move them **all** click on the Overall Position buttons.

When creating multiples, the program gives each field a unique name by appending a number on the end of the original name.



Positioning and Aligning fields

To make the form look uniform, there are ways to align, center and size similar fields. Select at least two fields. (Select one and then Ctrl + click each succeeding field) Right click on one of the selected fields and choose whether you want to align or size, etc. the fields. Choose from the flyout menus and the fields will automatically arrange or size themselves accordingly.



Selecting Fields

Choosing a Form Field icon will show all of that type of field that is set up on the page. To show all types of form fields at once, choose the Select Object on the Advanced Editing toolbar.