

Acrobat forms with LiveCycle Designer

DISCOVERY SERVICES TRAINING

About E-mailable forms

Adobe LiveCycle can be used to automatically distribute interactive forms via email, and systematically collect the results.

Starting in Word

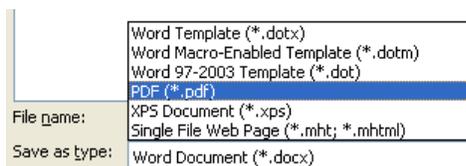
To get started, first create a document (such as MS Word, Publisher, etc.) and design the layout of your form.

Leave space where the form elements will later be placed.

There is no need to include lines (for example: 'Name: _____' is not necessary. 'Name: _____' is best). *Be sure to include the text for Radio Buttons & Check Boxes.*

Be sure to finalize your design BEFORE moving forward. It is difficult to go back and edit the layout once you start working with Acrobat.

Save the document as a PDF by selecting the "PDF" option from the "Save as type" drop-down menu.



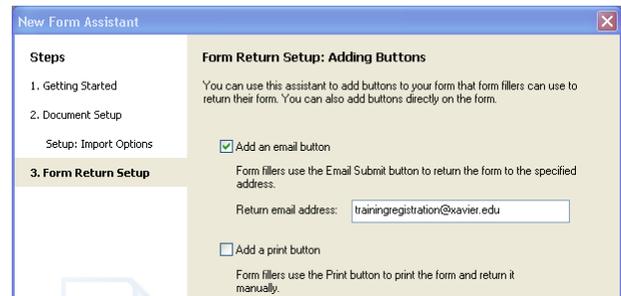
Moving from Word to LiveCycle

1. Open Adobe LiveCycle Designer.
2. Open the PDF you just saved by either clicking on the "Open Form" icon from the Welcome screen....



or clicking on "File/Open" from the drop-down menus.

3. Navigate to the location where the PDF is saved.
4. Select the desired Import Option.
5. In the Form Return Setup dialog box, select the option to "Add an email button".



6. Type in the entire email address to indicate where the form will be returned.
7. Click on the **Finish** button. The form is now ready for editing.

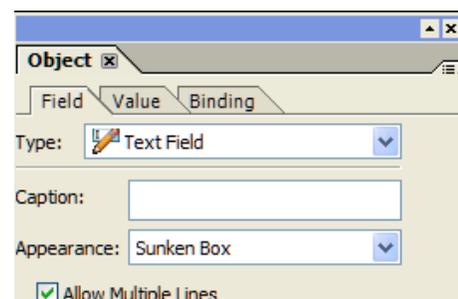
Starting in LiveCycle

1. Open Adobe LiveCycle Designer.
2. To view the grid / snap to grid, choose 'View > Grid' and/or 'View > Snap to Grid'
3. Open the 'Library' and 'Object' panels if they are not already displayed. To do this, go to 'Window > Library and Window > Object' and 'Window > Library and Window > Library'.
4. From the Library, drag and drop form elements onto the page including text boxes, images and form fields.

Note: As you drop form elements onto the page you are establishing the tab order of the form.

About the Object Panel

Once placed, click on the form object. The 'Object' panel will change to display the properties of that object. Edit as needed.



Acrobat forms with LiveCycle Designer

DISCOVERY SERVICES TRAINING

LiveCycle Designer Form Elements

For simple forms, you may wish to minimize all of the panels except for 'My Favorites' or 'Standard'.

To provide an on/off (or checked/not checked) value for emailed content, click the Binding tab.

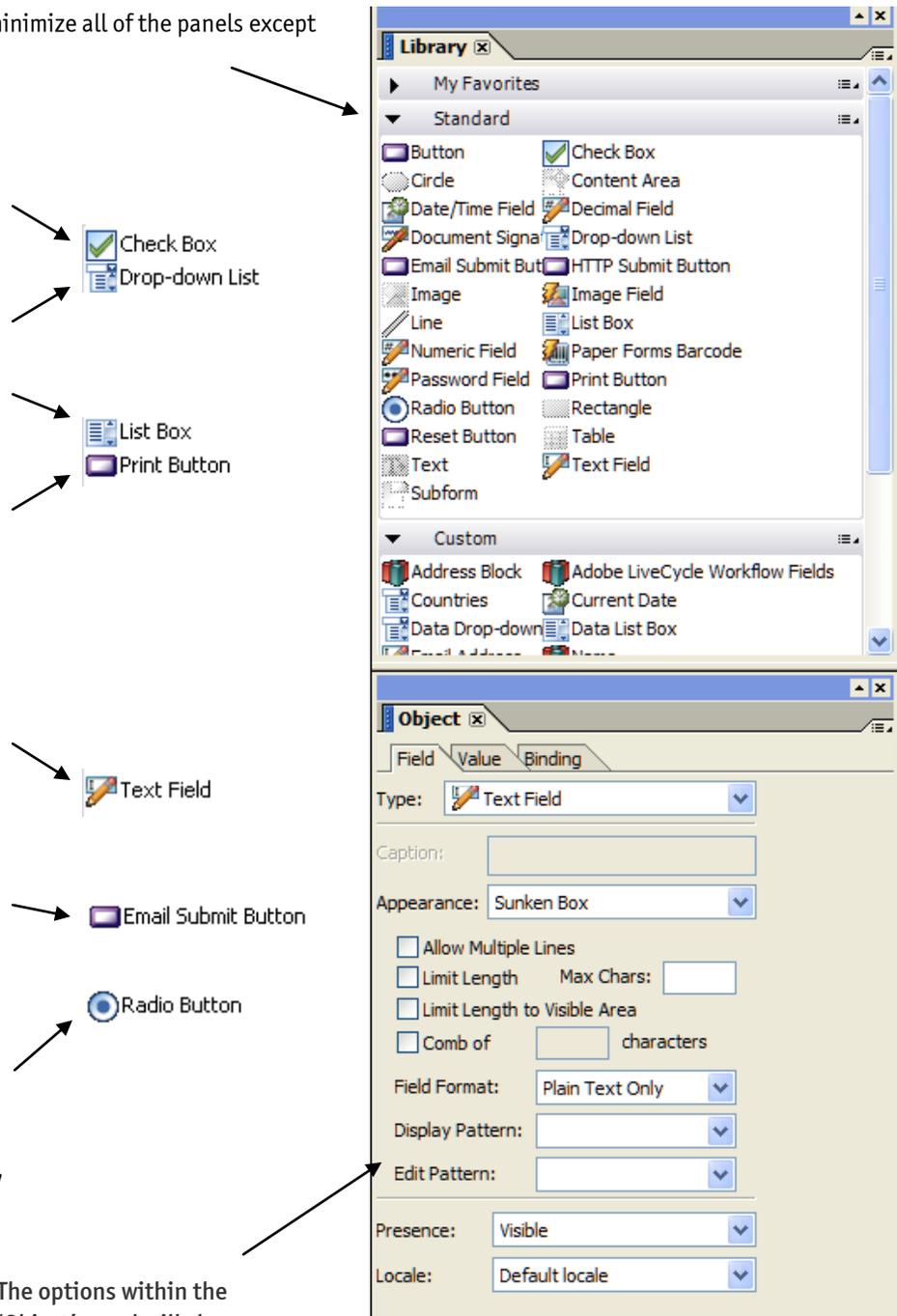
Click the  plus button in the Field Tab of the Object Panel to add options for the user to choose from.

Make it quick and easy for your users to print the form by providing a print button.

Options include: allowing for multiple lines and limiting the length of text entered.

An email address must be provided. You can also choose to provide a 'Email Subject' for the emailed forms you receive. Emailed form content can be opened with Excel.

In the binding tab, be sure that a set of radio buttons have the same name. For emailed forms, double click on the list value under 'Specify Item Values' to change the value.



The screenshot shows the LiveCycle Designer interface. The 'Library' panel on the right is expanded to show 'My Favorites' and 'Standard' categories. The 'Object' panel on the bottom right is open to the 'Binding' tab, showing configuration options for a 'Text Field' object. Arrows point from text blocks on the left to specific elements in the panels:

- An arrow points from the text 'For simple forms...' to the 'Standard' category in the Library panel.
- An arrow points from 'To provide an on/off...' to the 'Check Box' icon in the Library panel.
- An arrow points from 'Click the plus button...' to the 'Drop-down List' icon in the Library panel.
- An arrow points from 'Make it quick and easy...' to the 'Print Button' icon in the Library panel.
- An arrow points from 'Options include...' to the 'Text Field' icon in the Library panel.
- An arrow points from 'An email address must be provided...' to the 'Email Submit Button' icon in the Library panel.
- An arrow points from 'In the binding tab...' to the 'Radio Button' icon in the Library panel.
- An arrow points from 'The options within the Object panel...' to the 'Binding' tab in the Object panel.

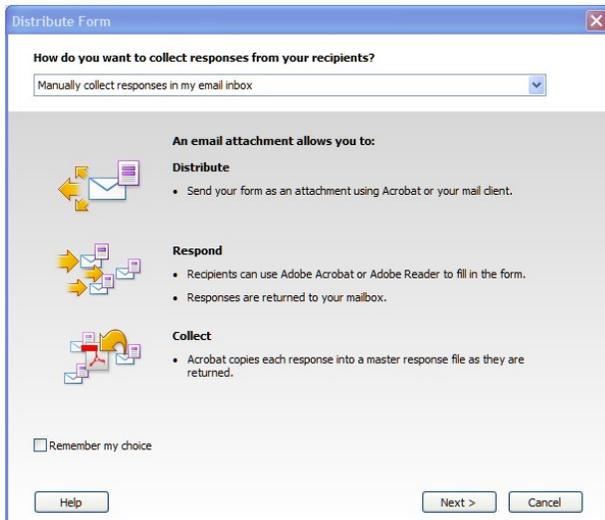
The options within the 'Object' panel will change depending on the form object you have selected.

Acrobat forms with LiveCycle Designer

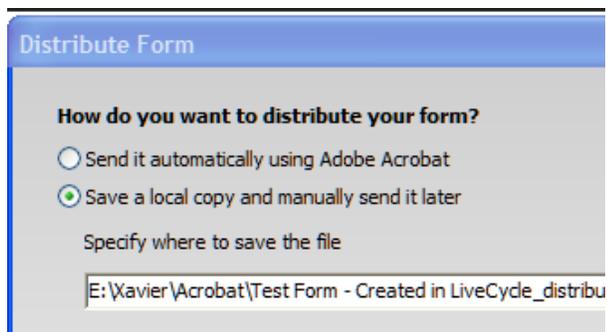
DISCOVERY SERVICES TRAINING

Completing the form

1. Add the enterable fields to the form using the instructions on Page 1 and 2.
2. Distribute the form by either clicking on the **Distribute Form** icon on the toolbar, or by selecting the **Distribute Form** command from the **File** menu. 
3. Indicate how you wish to collect the responses by selecting the preferred method from the drop-down list. Click the **Next** button.

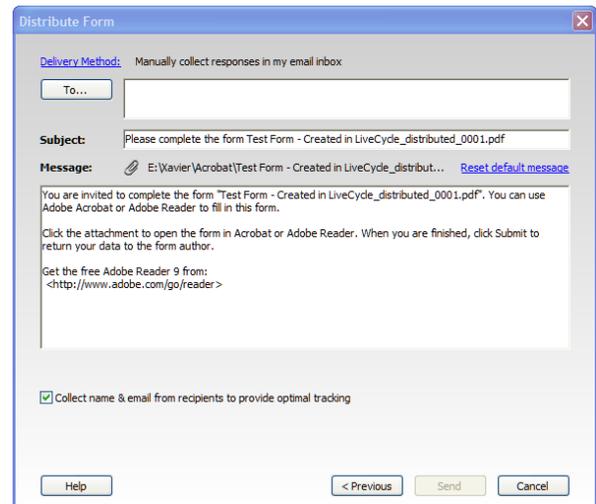


4. Specify whether you wish to have the form sent automatically, or if you prefer to save it locally and send it at a later time. Click the **Next** button.



5. If you chose to have the form distributed **automatically**, the next screen will allow you to fill in the target email addresses. You can either select addresses from one of your address lists by clicking on the **To:** button, or you can type in email addresses manually, separating them with a semi-colon.

6. Type in the desired **Subject** line.
7. Adobe LiveCycle will automatically fill in an explanation in the Message field. You can delete, modify, or completely replace the text in this field.
8. Indicate if you wish to collect the names and email addresses of the responders by checking or unchecking the checkbox.
9. Click the **Send** button to distribute the survey to the recipients you have specified.



Collecting Data

1. Once submitted, PDF forms will be sent to the email address specified.

Submitting Completed Form

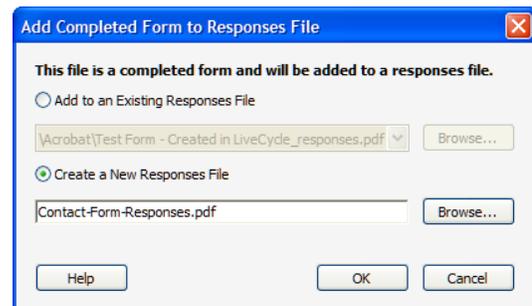
Murphy, Jessica

Sent: Tue 6/15/2010 12:27 PM

To: Murphy, Jessica

Message | Test Form - Created in LiveCycle_distributed.pdf (1.26 KB)

2. Double-click to open the attached PDF.
3. Choose whether you would like to add this form to an existing response file (which collects all the submitted forms in one location) or to create a new response file.



Acrobat forms with LiveCycle Designer

DISCOVERY SERVICES TRAINING

Collecting Data, Continued

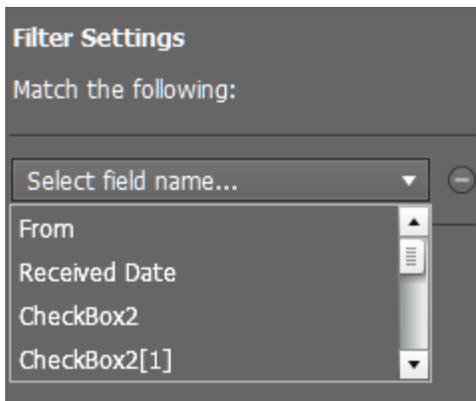
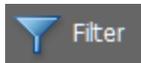
1. You will see a Welcome Screen that informs you this form has been added.



2. After closing the Welcome Screen you will see a list of all the forms that have been collected by this particular Response file.

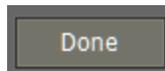
FILTERING DATA

1. To sort collected forms, click on the filter button on the left side.
2. From the drop-down list, choose an option to sort by.



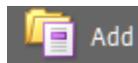
For example, you might sort by name or by the date that the form was added.

3. Click the done button when finished.



MANUALLY ADD A FORM TO THE RESPONSE FILE

1. To manually add a form to the response file, click on the Add button.

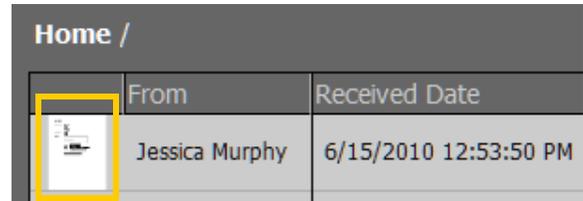


VIEWING COLLECTED FORMS

1. To view a list of all the collected forms, click on the list button at the top of the interface.



2. Double-click on the form page thumbnail to open it.

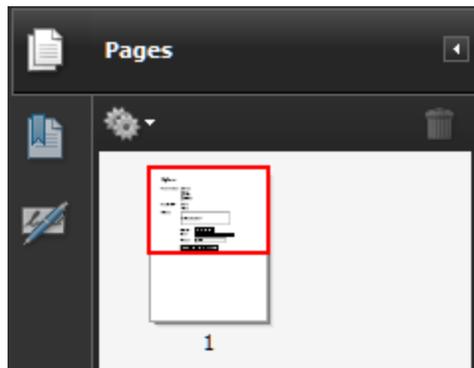


Home /	From	Received Date
	Jessica Murphy	6/15/2010 12:53:50 PM

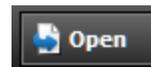
3. Once the form opens, use the arrows at the top left to browse through the collected forms.



4. If each form contains multiple pages, use the pages button to see a thumbnail of each one.



5. To open the form in a new window (a standard Acrobat window), click on the Open button.



6. To add markups / comments to a form choose 'Comments > Add Sticky Note'.

