Adobe
Acrobat 9 Professional
Forms
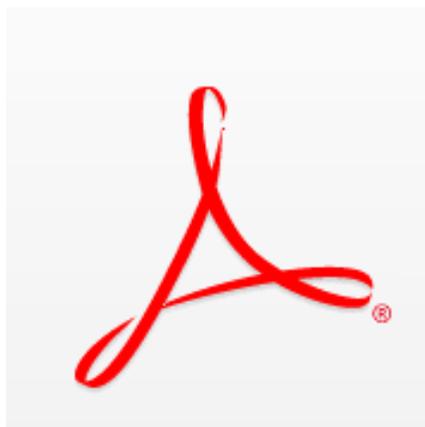
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Forms

We use forms all the time for gathering information. Many forms are created in programs like Word or in a design program such as InDesign or Publisher. These forms look great and are good if you want to print the form out and fill it in, but more frequently we want the ability of creating the forms, sending them by email and having them filled out online and the information returned to us, either by email or into a database. And we want everyone regardless of computer platform or operating system to be able to have access to our forms.

In this workshop we will learn how to create the forms and how to get the responses returned by email.

Creating forms

One way to share forms across different platforms is to use 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. You will have to add form fields to your pdf document so it will be usable by others.

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.

New to Acrobat Professional (Starting with Acrobat 8), is **Form Field Recognition**.

Form Field Recognition

New to Acrobat Professional (Starting with Acrobat 8), is **Form Field Recognition**. Once you create a form you can run form field recognition to have Acrobat insert form fields. If you have no documents open, you can start from the **Forms Menu**, by choosing **Form Wizard**.

You will get a choice to open several types of documents or scan a paper form, turn them into a PDF, then look at the form and see if it can recognize anything that looks like a form field. If there are small boxes it may make them Check Boxes. If there are labels with lines after them it will most likely make a text field. Choices of Yes and No or items with small circles may turn into radio buttons. Once Acrobat has added what it thinks are good form fields it will open the document up and give you the opportunity to fix fields not created well, or just edit with new names and other properties the fields that have been created by Acrobat. The created form fields show up in a list on the left side of the window in a Recognition Report. Clicking on any Field will highlight the field. When you are done you can close the Report with the X in the upper right hand corner. Using the Select tool you can double click on any field or select and right click to choose properties to open up the **Field Properties** Dialog Box to edit the fields. As you can see from the box above you can also start from a blank page this will open up a secondary program call Live Cycle Designer. This choice will not be covered in this workshop.
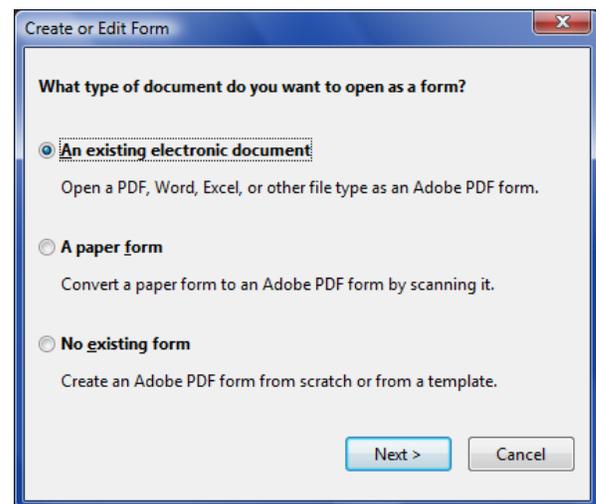
Forms Toolbar

| A. | B. | C. | D. | E. | F. | G. | H. | I. | J. | | K. | L. | | M. | N. |

Form Fields
- A. Select Tool – Will show where any fields are on your page. Click to select or double click to open the Properties dialog box.
- B. Text Field - User can type in information requested
- C. Check Box - User can choose one or more options.
- D. Radio Button - User can make a single choice among several options Combo Box - User can choose from a list or enter custom information
- E. List Field - User can choose one or more choices in a list
- F. Combo Box – user can choose one or be allowed to enter their own text
- G. Button Field - Initiates actions such as clear form, submit form, print form.
- H. Digital Signature - Creates a special field to add a digital signature to the document
- I. Barcode Tool - Add barcode to the document
- J. Keep tool selected – Allows you to create multiples of the same field type
- K. Hide forms toolbar
- L. Preview / Edit layout toggle
- M. Distribute Form – Wizard to set up Distribution of the form
- N. Close Form Editing

You will not see the Forms toolbar unless you open a form or start the **Form Wizard.** With this task pane showing, you can choose **Add New Field** and then **Show Tools on Toolbar.**
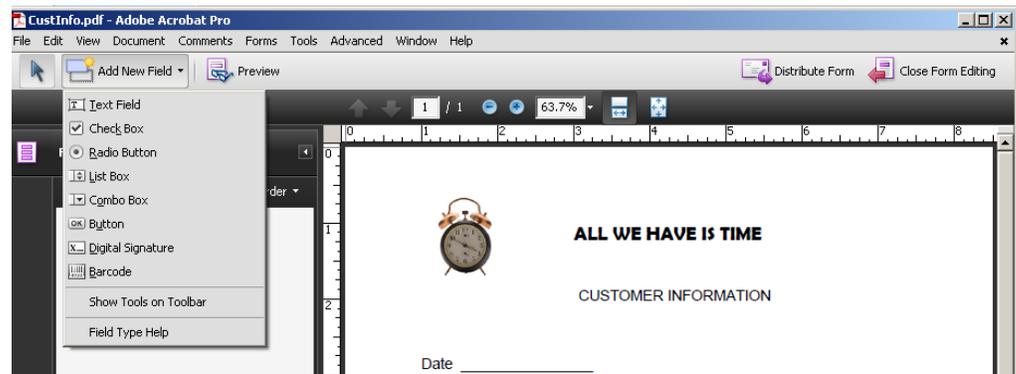
Fields Pane

Once you have run the Form Wizard, you will see a screen similar to the one below. This one has the Forms toolbar showing. From here you can select the fields created by Acrobat and edit names and add properties as necessary.
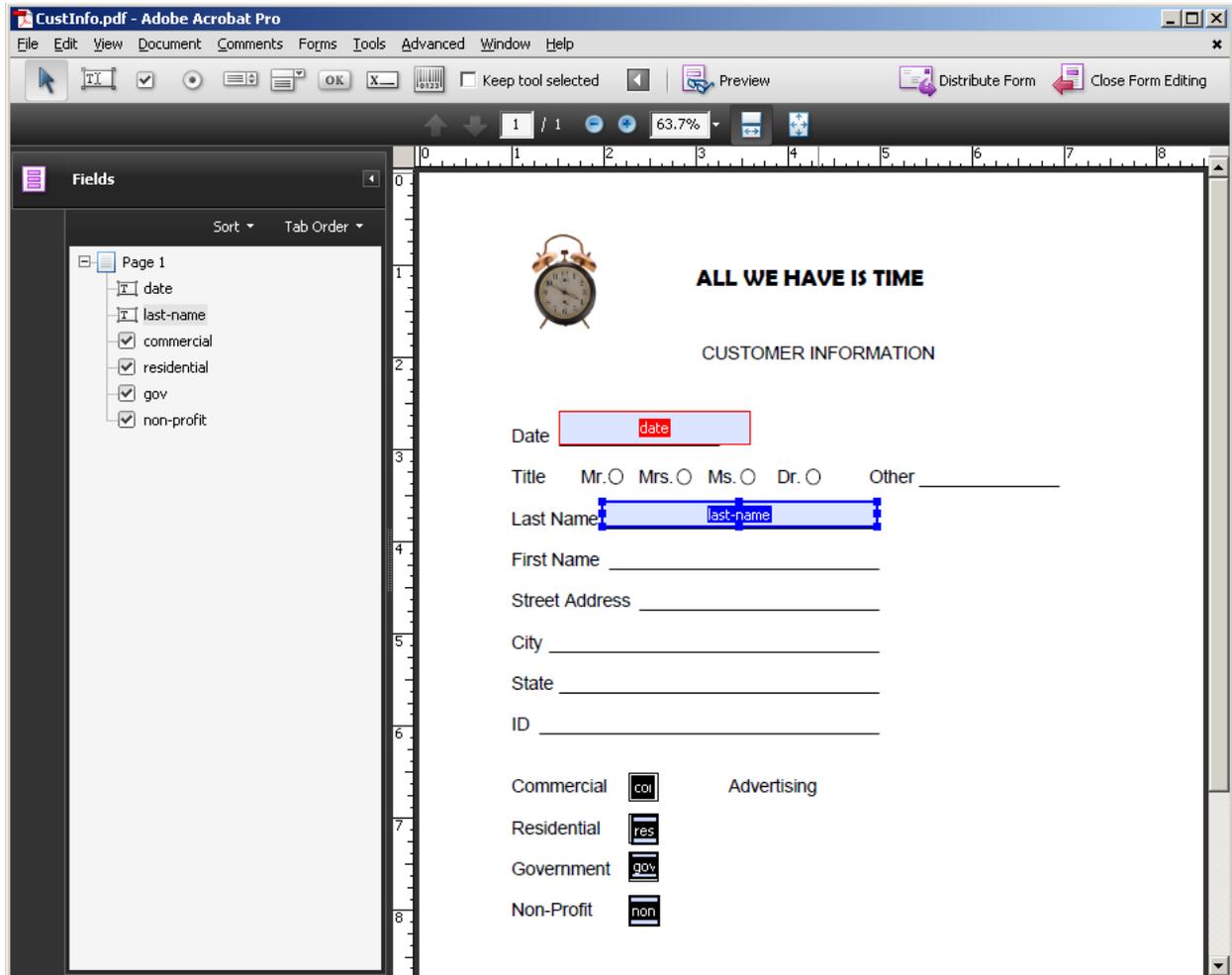
Add Form Fields to the .pdf document

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 to place the form field or drag to "draw" the field on your document. When you are done a new **Field Name** dialog box opens. Each field needs to be named descriptively and uniquely. The field name pop up box allows you to name the field and **Show All Properties** if you want to add or change other field properties. The dialog boxes for the field properties 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 or edit 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 cannot be changed unless the Locked box is unchecked.
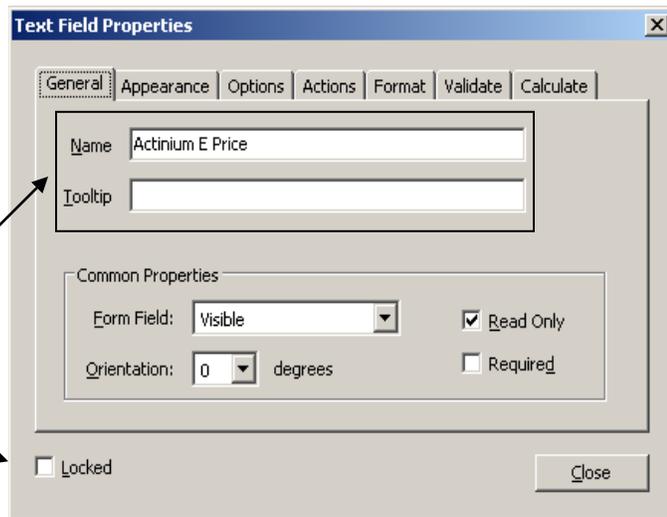
Appearance Tab

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. Auto in the Font Size text box means the text will size to fit the box you create and will get smaller as the user adds more text. Set a fixed size to see a consistent font size. Choosing fonts above the light gray line in the font list will give more widely available fonts.
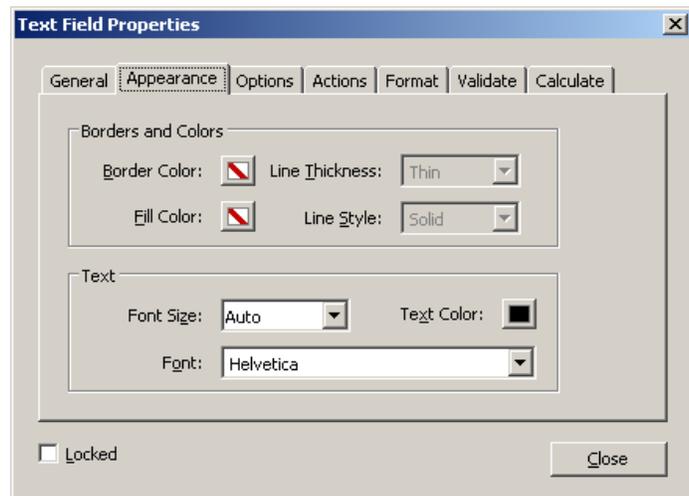
Options Tab

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.

Text Field Properties

General | Appearance | Options | Actions | Format | Validate | Calculate

Alignment: Left

Default Value: FL

☐ Multi-line
☑ Scroll long text
☐ Allow Rich Text Formatting

☑ Limit of 2 characters

☐ Password
☐ Field is used for file selection
☑ Check spelling

☐ Comb of 0 characters

☐ Locked   Close
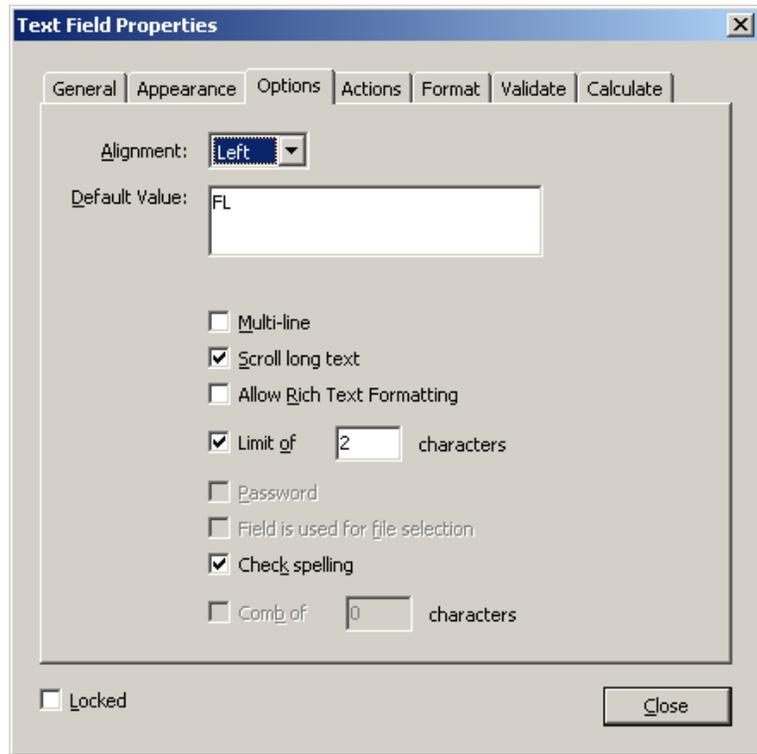
Actions Tab

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 both the trigger to cause the action and the action. Each of these items must be defined. Use the drop down menus to define your actions and triggers. This might be particularly useful on button fields.

1. Select a trigger
2. Select an action
3. Click on the add button
4. Choose fields or files or add URL as needed in the dialog box that opens
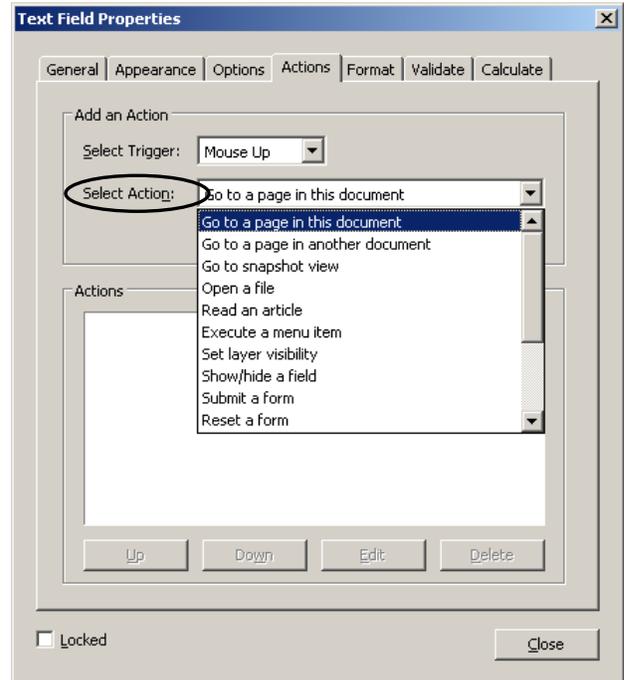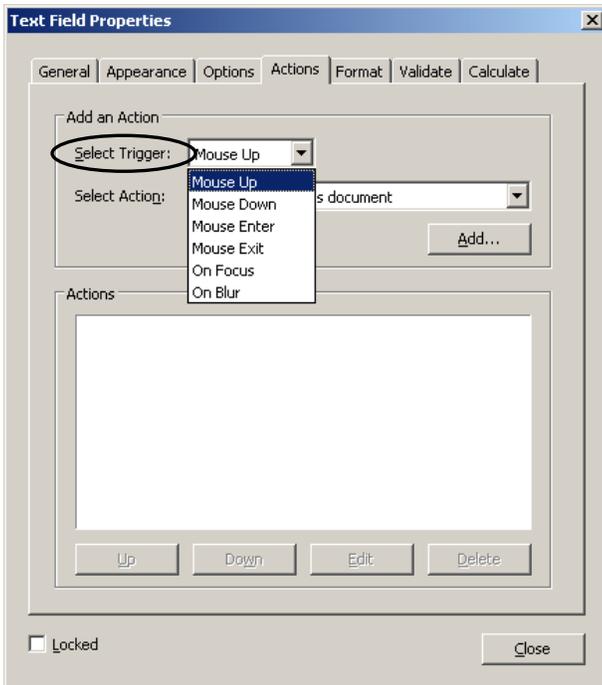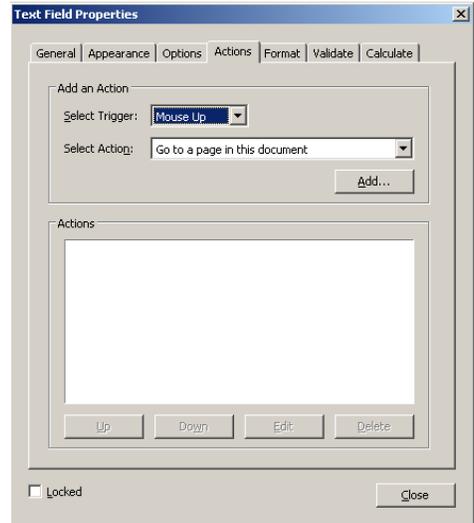
Format Tab

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 (dollar sign) 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.
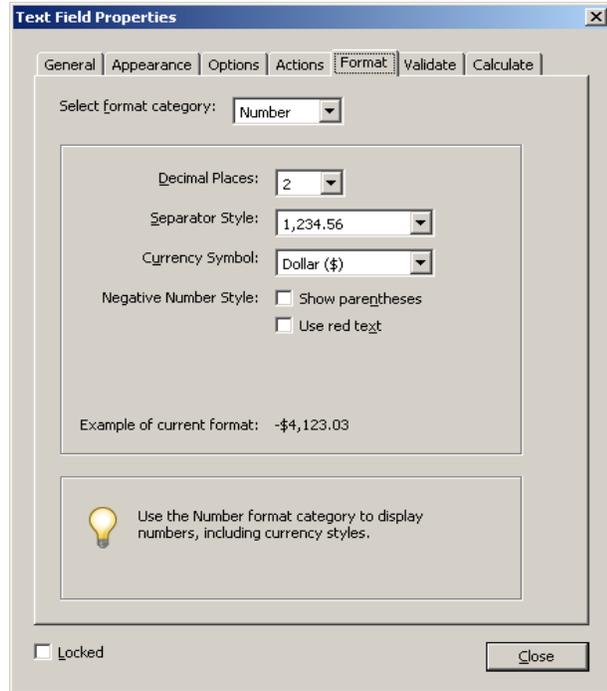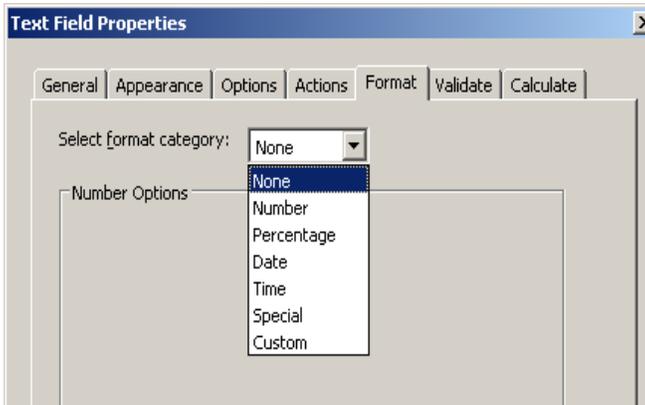
Validate Tab

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.
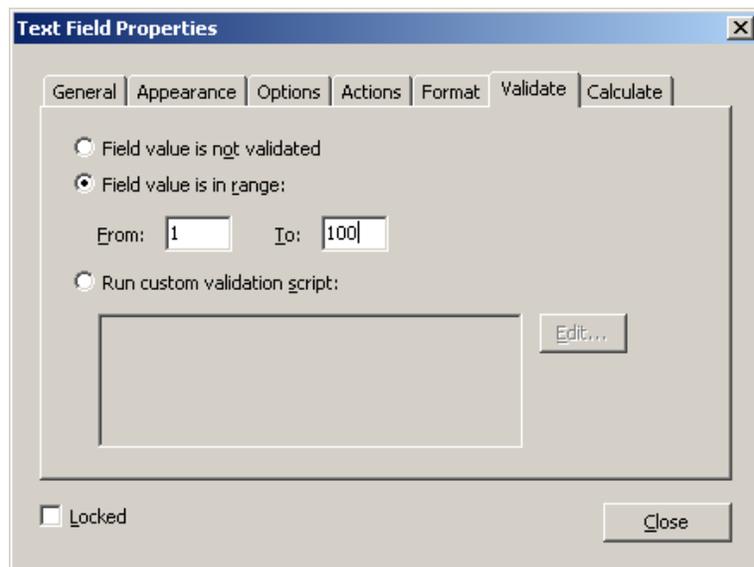
Calculate Tab

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. The functions available are:

- Sum
- Product
- Average
- Minimum
- Maximum
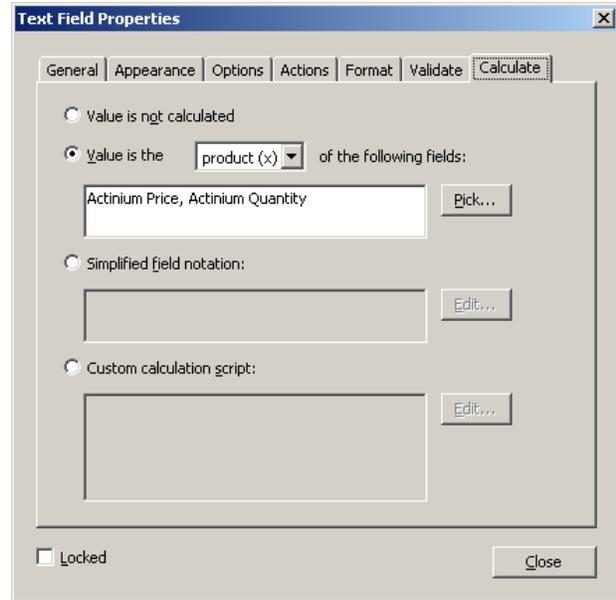
Calculation Preferences

Some form 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.
If you are going to do any calculations you want to make sure the **Automatically calculate field values** is checked.
If you want a box to show up when the user hovers over a text field, check **Show border hover color for fields**.
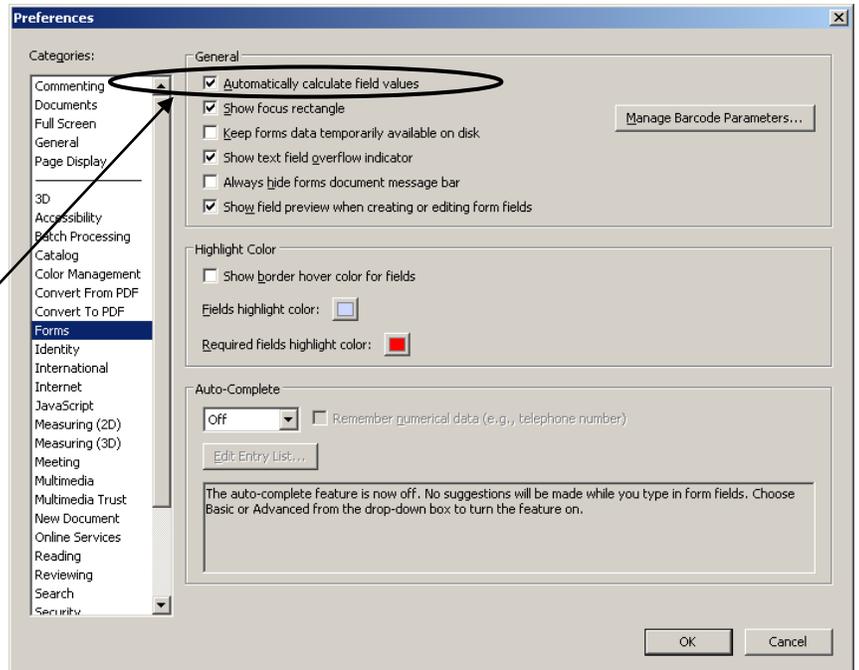
Form Field Characteristics

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 <u>middle</u> 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 a black arrow head. Click and drag to move the field.

Export values are the information sent 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.
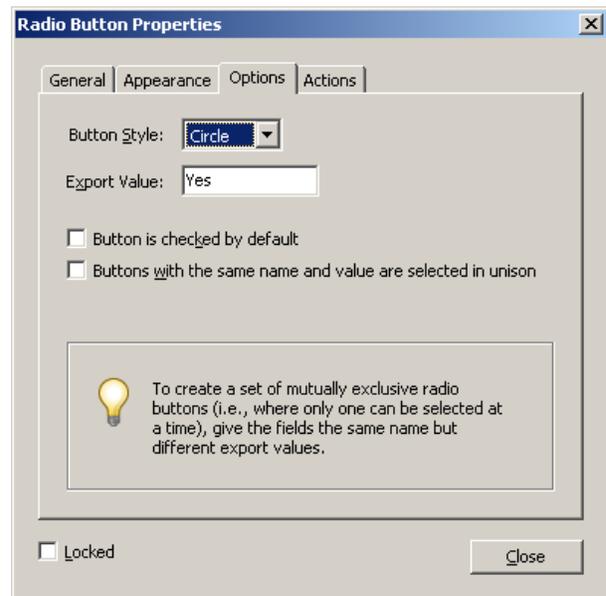
- **Combo Boxes**

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 does not allow the user to enter a choice manually. It will allow multiple choices by choosing one and ctrl + click on other choices.
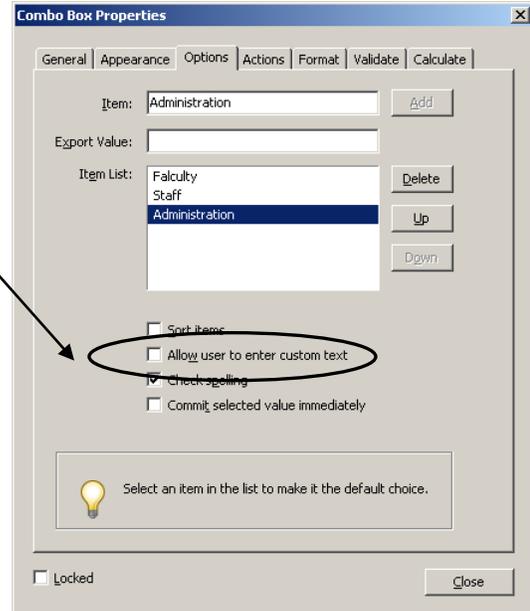
- **Text Boxes**

If text boxes are named the same they will all fill in when the first one of that name is filled in. For example if you have a two page document and the user types his name in the "name" text field on page one the "name" text field on page two will also fill in at the same time.

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.
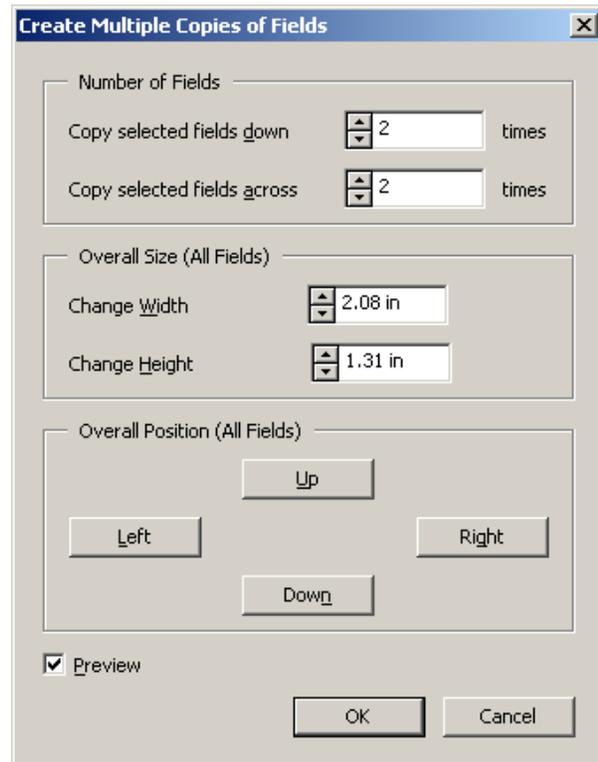
Positioning and Aligning fields

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 filed)
Right click on one of the selected fields and chose 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. *The last object selected is the one that the size or location is based on.*
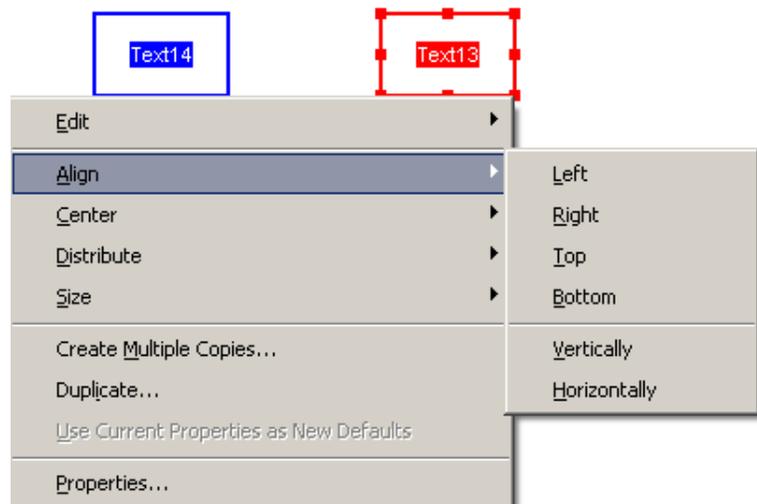
Selecting Fields

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** arrow on the **Advanced Editing** toolbar.

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Submit the Form

Once you have the form designed, you may want to have the information sent back to you electronically. This can be done by creating a submit button. Create this button with the action **Submit a form**. Then you can add a script if one is available or you can have the information sent back to you by email.
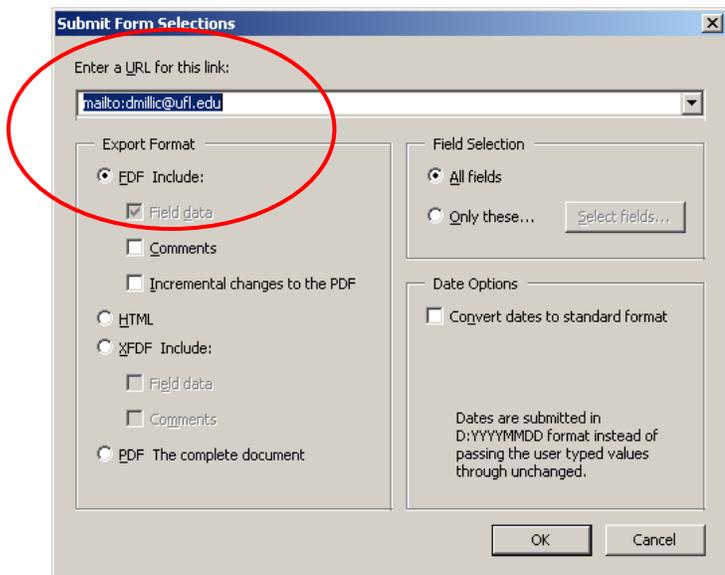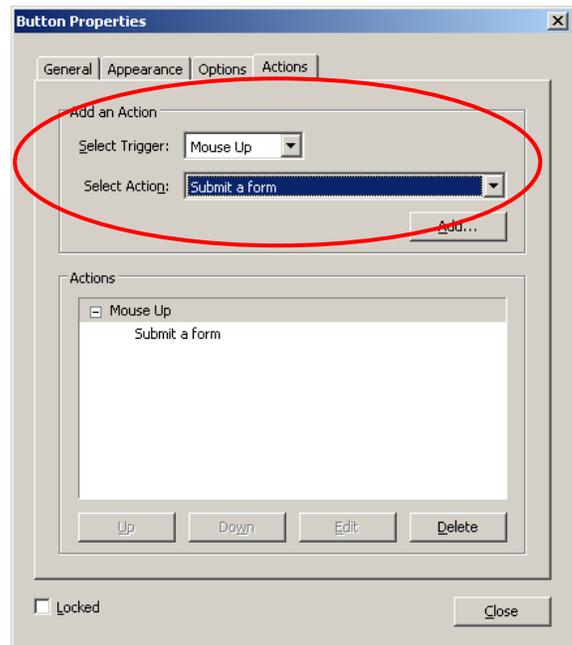
If you are having the information sent back to you by email; when it asks for a URL use the format (no spaces!) mailto:youremailaddress . You could put someone else's email here if they are supposed to get the information also. Put a ; between each email address no spaces. Choose the FDF Include for Export Format.

If you are using a script you would put the script address here. Use the Export Format that fits the script.

Reader Rights Enabled

The form cannot be saved with the free Reader. It can be printed and the information can be returned, but the full form cannot be saved. If you created the form and get the information back on the same machine, Acrobat will open the form and fill in the fields with the information that was returned. However there is a new option to Extend Features in Adobe Reader. This can be found under the Advanced Menu. This will allow Saving the form, Commenting, Signing digital signatures. However once Readers Rights are enabled it does lock the form from editing. So best practice is to save the form once and then save a copy with Reader Rights Enabled.

Returning the information by email – Users view

When someone receives your form they can open it up and fill in the fields, then return the information by email.
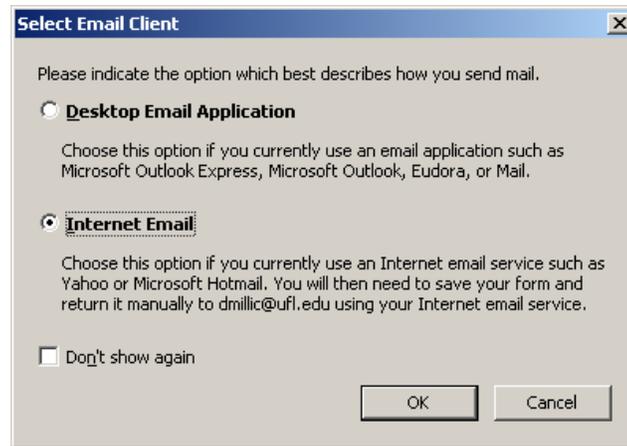
If they are at their own desk and have an email client, they would choose the first option and the email will open and have the proper email address and the data file attached. All that is required by the user is to click the send button on the email.
If however, they do not have an email client and/or they are using Web (Internet) Mail they will have to choose the second option. Then the next dialog box will open.

This requires a little more interaction by the user.
1. Save the file containing the data they entered on the form. Note the email address to which the form needs to be returned.
2. Then open a new email message add the email address and subject
3. Attach the file they saved.
4. Send email.

Create Spreadsheet from data files

Once you have received the information back, Acrobat has included a way to create a spreadsheet so you can see all of the information you have collected.

- When you get the responses from your form, save each file. You may want to create a folder for the results for each form you create.
- Open the Acrobat program and from the **Forms menu** choose **Manage Form Data** and then **Merge Data files into Spreadsheet**.
- When the dialog box pops up choose **Add files.** Locate and add each file that you had returned to you for that form.
- **Export** them and a new box will pop up to allow you to save a **csv** (comma separated value file).
- Then choose View Now to open an Excel worksheet and view the information.

Distributing Forms

When you have finished your form a new way to distribute the Form is incorporated into the forms Editing toolbar.
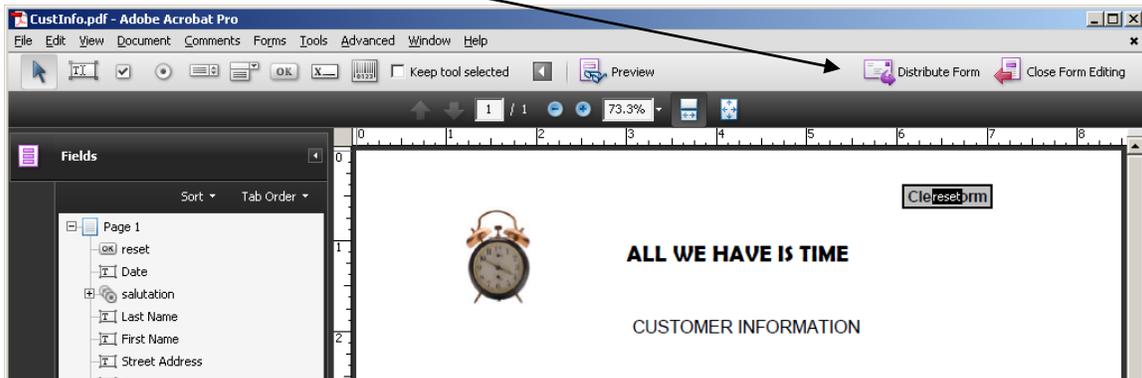
When you choose **Distribute Form** the following dialog box opens to ask how you want to collect responses – by mail or on a server. Then you can choose to send it now or save it to send later. You can choose to send to one recipient or multiple recipients.
By using this method of distributing forms you extend features to Adobe Reader users. This allows Reader users to fill out and save the form. It does add some editing restrictions to the form, so Acrobat saves it with a new name.
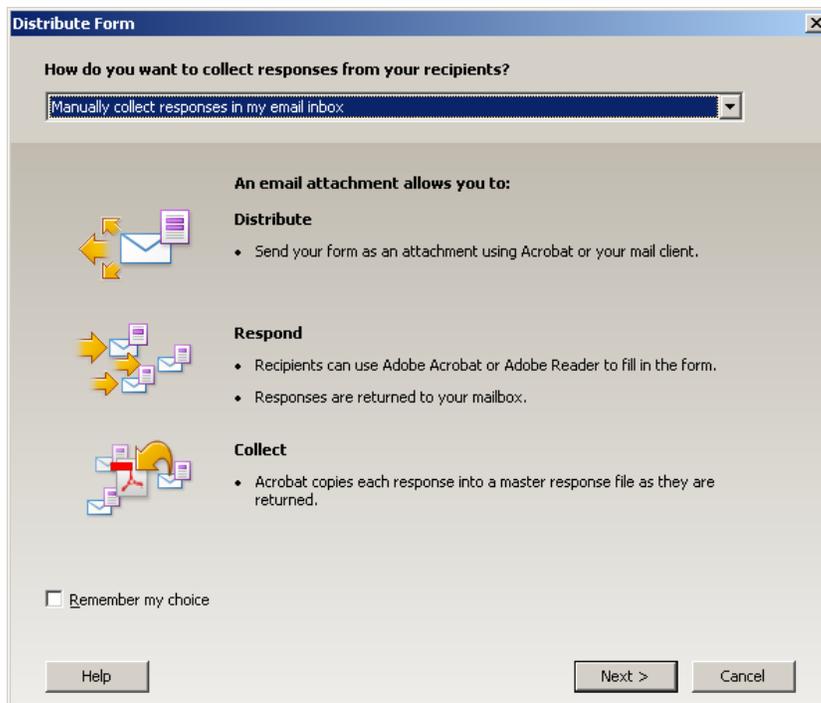
When you get the form returned to you, double click on the attachment and it will open the form and the following dialog box.
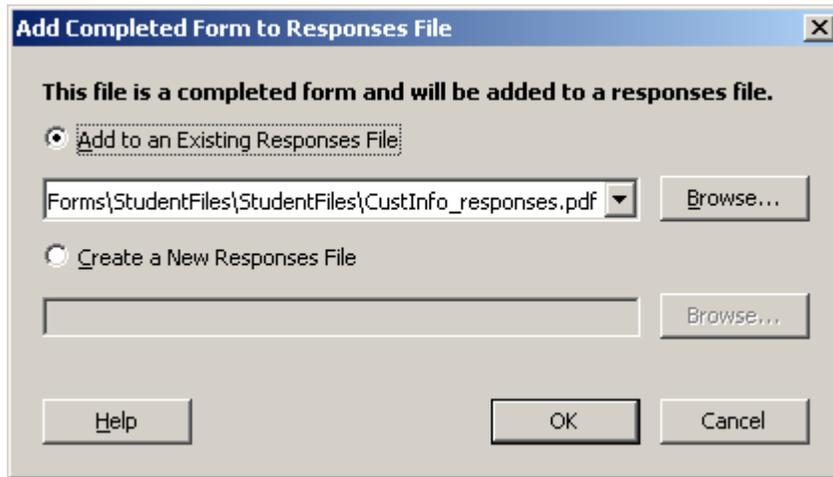
This will save the responses to your Form Responses file and create a list of responses. This **Tracker** will show who you distributed the forms to and who has responded.
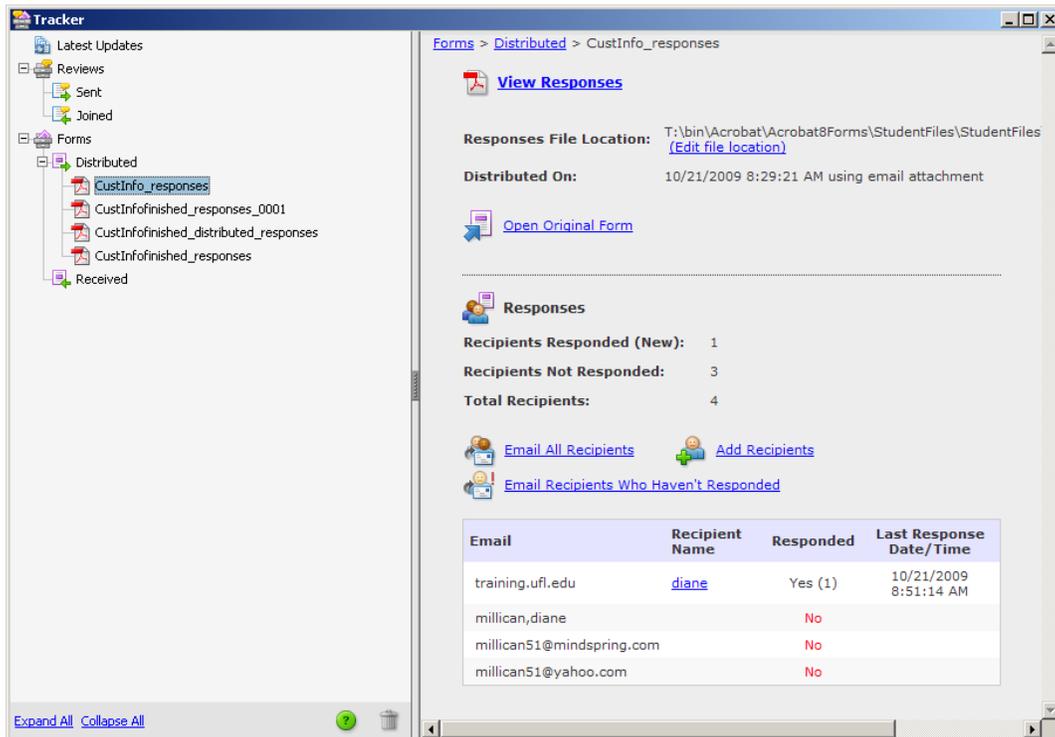
This is the **Tracker** for your form responses. You can see the responses, you can sort by clicking on the header or you can **Export** to a **CSV** file and then open that in Excel.

When you distribute your form, the recipients fill out the form and hit the Submit Button. Then they get this Send Form dialog box. They fill it out and hit Send and get the second dialog box.

At this point they choose how they want to send Desktop Email (Outlook, Groupwise) or Internet mail (yahoo, gmail). If they have a Desktop application, it will open a new email message and attach the form. If they have Internet Email it will prompt them to save the form and then they will have to open a new message (or reply to the message they received) and attach the form that they saved.

By distributing the form, it was Reader Enabled so the form could be filled in and saved. This worked with Adobe Reader 9.0.