

Adobe Acrobat: Creating Interactive Forms

This document provides information regarding creating interactive forms in Adobe Acrobat. Please note that creating forms requires the professional version (not the standard version) of Acrobat.

Getting Started

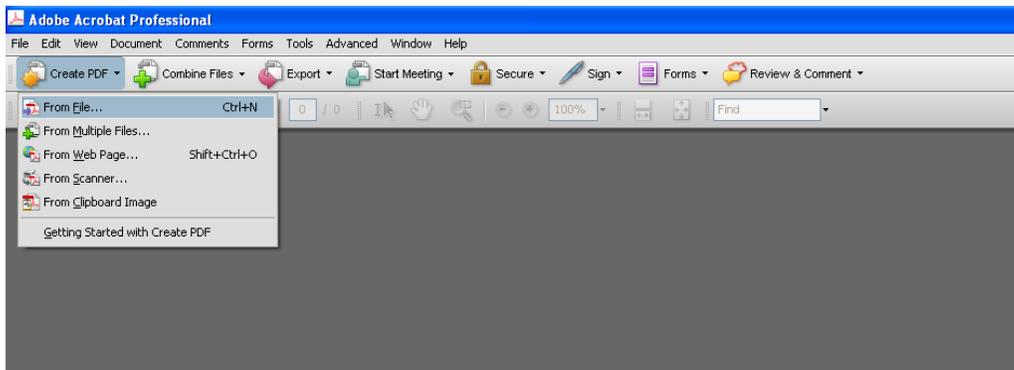
The text and structure of editable forms can be created in programs other than Adobe. For example, Microsoft Word is often used to create the layout of the form (minus the form fields). The document can then be converted to a pdf format. Once saved as a pdf, the form fields are added using Acrobat.

To convert a Word document to a pdf,

- In Office 97-2003, use the Convert button in the Adobe toolbar.
- In Office 2007, click the Microsoft Office button and choose Save As. Then choose PDF.



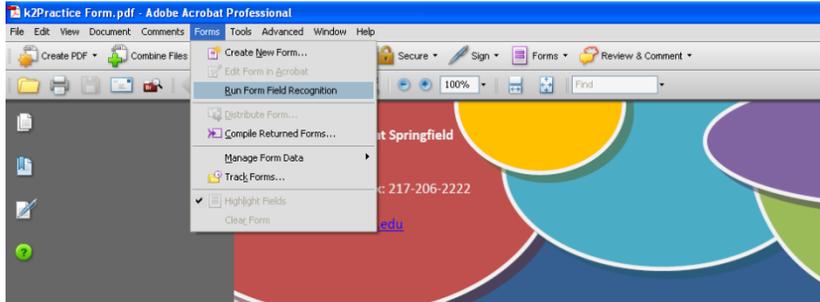
- Or open Adobe Acrobat. Click Create PDF, then choose From File. Browse for the document.



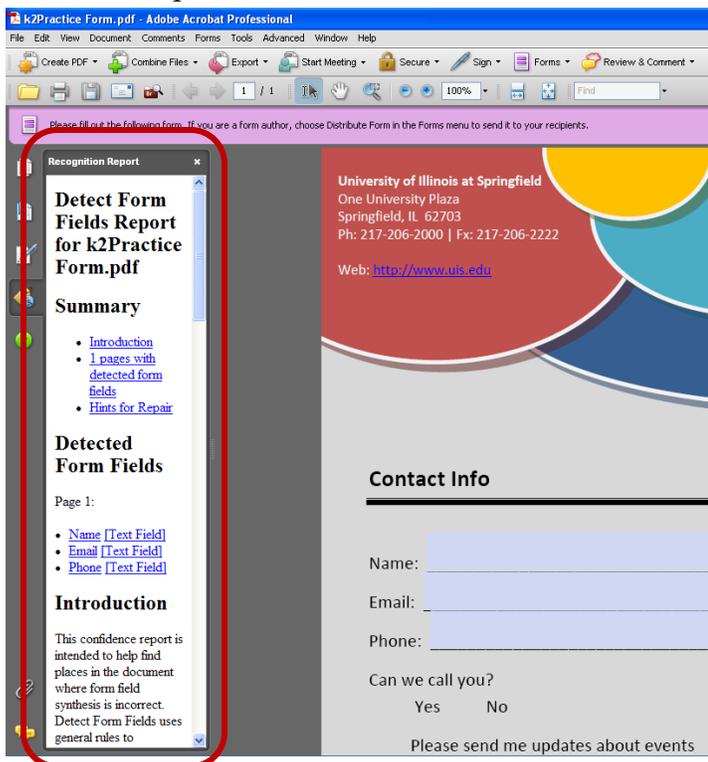
Activating the Form Utilities

Once the document is in a pdf format, you can use the form features in Acrobat. Acrobat 8 includes a detection feature, which automatically adds form fields to your file. To run the detection tool,

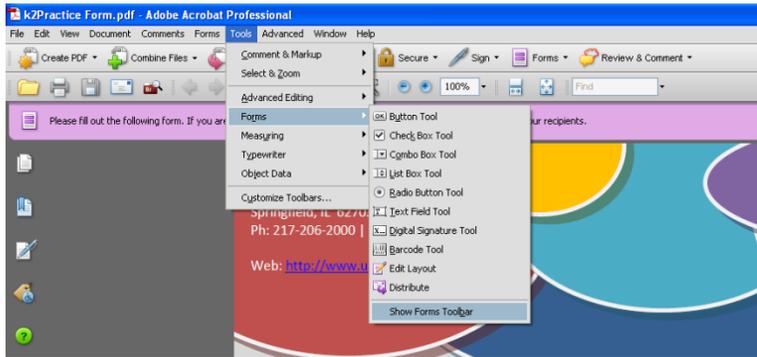
1. From the **Forms** menu, choose **Run Form Field Recognition**.



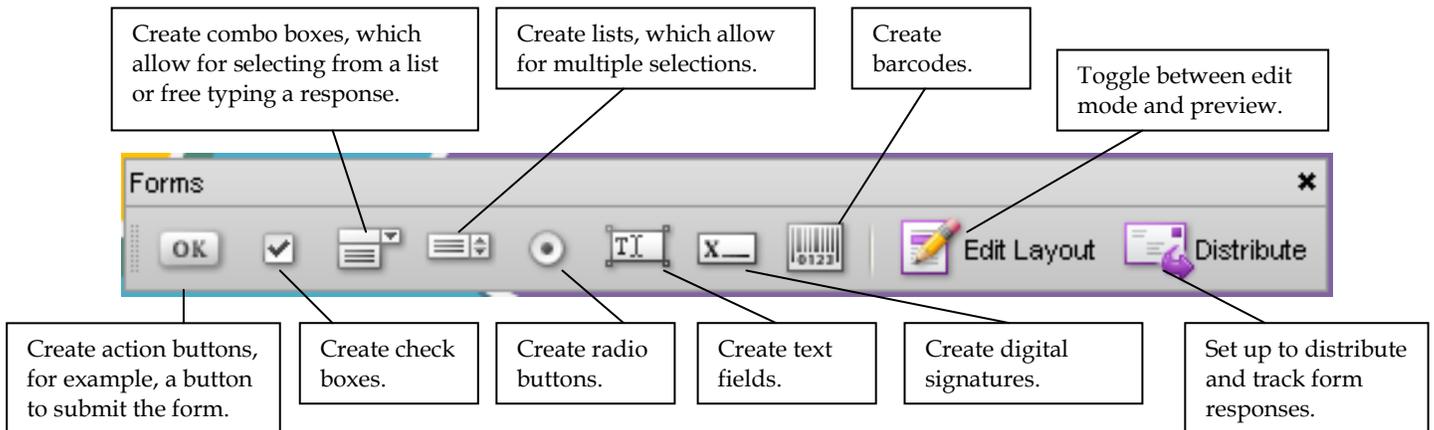
2. When completed, a **Recognition Report** pane will open up detailing the fields that were found and created. Acrobat typically recognizes form fields by finding blank lines or boxes for check marks. The report can be closed by clicking on the 'x' in the upper right corner of the pane.



3. Form fields can be added, modified, or deleted through the Forms toolbar. To turn on the Forms toolbar, from the **Tools** menu, choose **Forms**, then **Show Forms Toolbar**.



The Forms Toolbar



Creating Form Fields

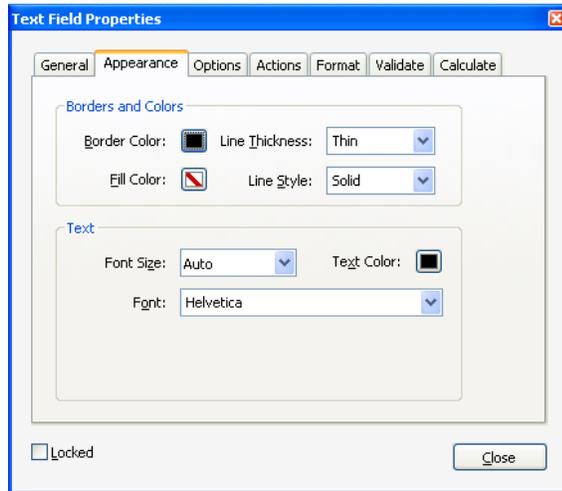
To add a form field,

1. Select the appropriate tool from the Forms toolbar.
2. Click and drag to 'draw' the field or double-click on the form in the desired location.
3. Set the field properties. The field properties vary by form field type. To adjust the properties, **double-click** the form field. Many of the properties are common for all field types.

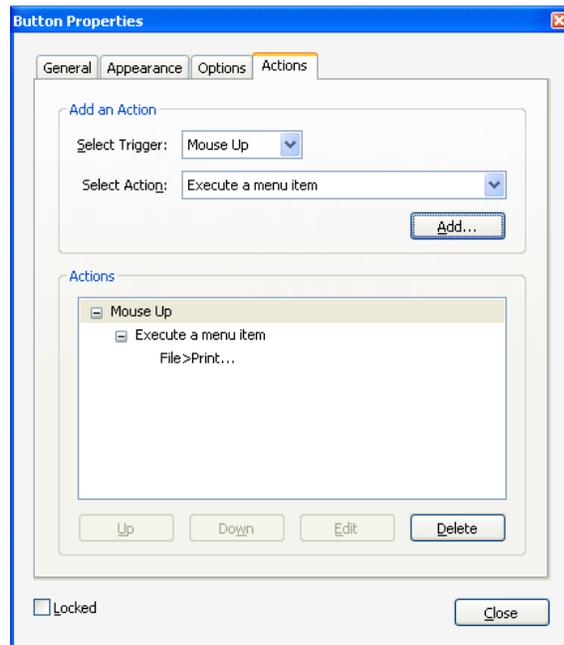
- a. Use the **General** tab to give the field a name and tooltip (the text that appears when the mouse hovers over the field).



- b. Use the **Appearance** tab to customize the formatting of the field.



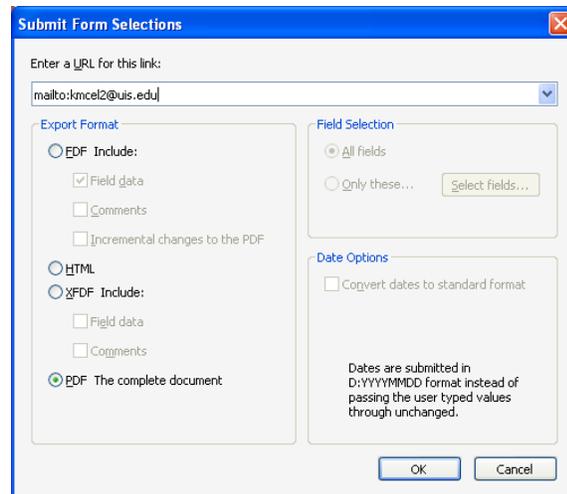
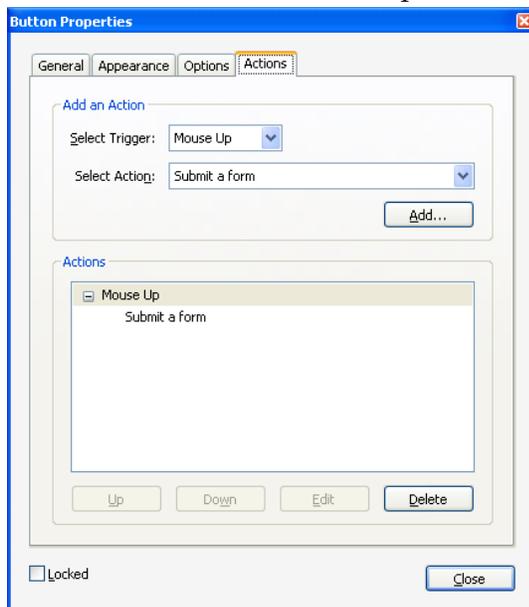
- c. Use the **Actions** tab to add an action to the field. For example, the File-Print command can be added to a button so that users can easily print a form.



- d. The **Options** tab has specified choices based on the type of form field. For example, you can choose if you want the check box to be checked by default or specify what choices appear in a dropdown list.

Special Notes about Form Fields

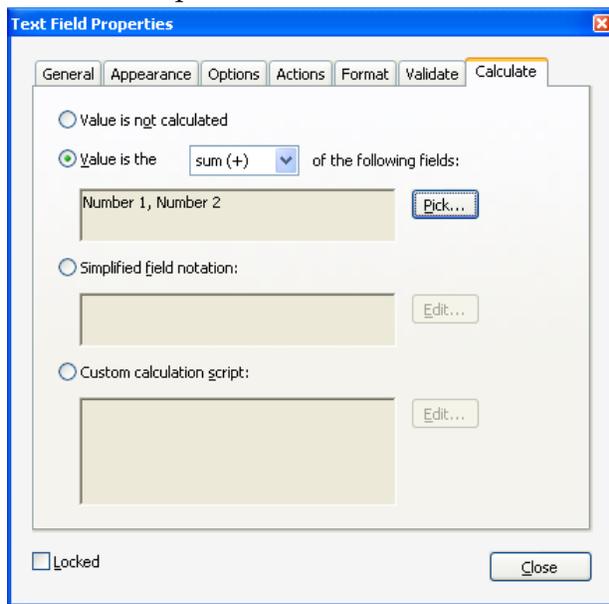
Action buttons: The Actions tab is especially important for setting the 'action' of the button. Most forms include buttons to print, submit, or reset the form.



Check boxes vs. radio buttons: Check boxes should be used when users should select zero, one, or multiple items. Radio buttons should be used when only one item can be selected. To group radio buttons as a set, give each button the same name but different export values. For example, check boxes are appropriate when selecting the toppings you would want on a pizza. Radio buttons are appropriate for choosing whether your order is for pick-up or delivery.

Combo boxes vs. list boxes: Both combo boxes and list boxes are helpful when you want users to select from a pre-determined list of items. Combo boxes allow users to type in custom text, if desired. List boxes allow users to select more than one item.

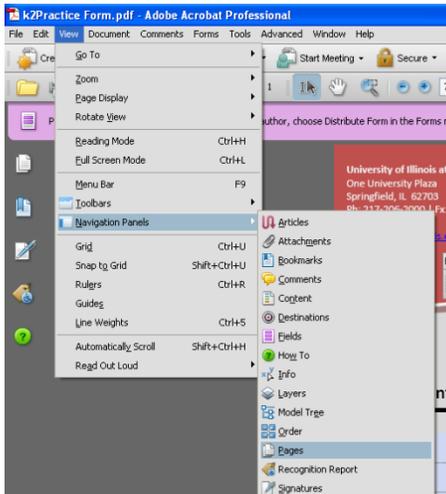
Calculated fields: Acrobat can perform some basic calculations. Use the Calculate tab on text fields to set up the calculation.



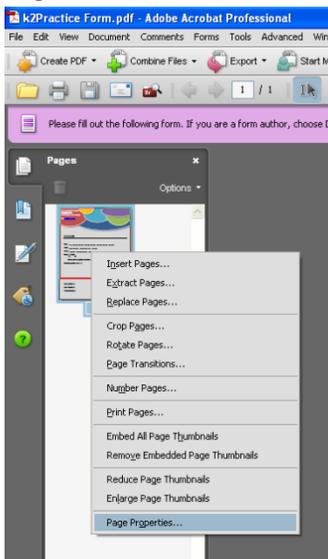
Setting the Tab Order of a Form

Forms that allow a user to press Tab to navigate from field to field are often easier to complete. To set the tab order of the form,

1. From the **View** menu, choose **Navigation Panels**, then **Pages**.



2. **Right-click** on the desired page and choose **Page Properties**.



3. Select the desired tab order preference.

