

Creating Forms with Acrobat X



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Adobe Acrobat Pro X provides you with the necessary tools to create active check boxes, radio buttons and writeable text fields in a PDF document. These tools make it easy for you to create basic forms. You can create your form in any Microsoft application, convert it to a PDF and then add boxes and or fields. An important advantage of using Acrobat Pro for forms is that any operating system can open the file.

Saving a Microsoft Word Document as a PDF

Before you save your word document make sure that the format, spelling and layout of the form is correct. Once the document is saved as a PDF you cannot make changes to the existing format, layout, etc. Some minor text changes can be made however.

Save as a PDF

- 1. On the ribbon click on the Acrobat tab.
- 2. Click Create PDF.



3. The following window will appear if you have not saved the word document. Click Yes to save the file.



4. The following window will appear.



5. When the document is finished converting it will open in Acrobat Pro.

Using Forms Auto-Recognition to Create Fields

Auto-recognition looks at the content of the PDF and determines where there should be form fields. Although this feature is helpful in adding fields to the form it is not perfect, there are times where it fails to create fields or adds fields where you don't want them. This will require action on your part to clean-up the fields.

Using Auto-Recognition

- 1. Click on Tools.
- 2. Select Create, note if you do not see the Create option expand the Forms section.



- 3. In the Create or Edit Form window choose the source of the document. You can use the current document, default selection, or you can scan a paper form and use the OCR features.
- 4. Click Next.



5. When the fields have been created the following window appears, click OK.



6. The fields have been added to the form.

2	FillableForm-example.pdf - Adobe Acrobat Pro		
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t	실 Create 🔻 🛛 🞦 🖨 💮 🖾 🖾 🖉 🐨 📰 🐨 🗵 📖 🖉 Keep tool selected		
0	🕒 🕢 1 / 1 📘 🗕 🕂 100% 💌 🗮 🔛 Preview		Form
	<u> </u>	-	▼ Tasks
0			Add New Field Distribute Track
1	SOFTWARE APPLICATION TRAINING SEMINAR Contact: jszonntag@wcupa.edu		Close Form Editing Cother Tasks Fields
2			Sort By 🔻 Tab Order
A POLICIAN A	Personal Information First Name Last Name Last Name	ш	Page 1 T First Name T Last Name Address
3	Address		_]II] City
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7. Once the fields have been added go through the document to check for missing and incorrect fields.

Creating Fields Manually

Creating fields manually gives you more control on what types of fields you can create and where these fields will be placed within the document.

- 1. Click on Tools.
- 2. Select Edit under the Forms section.



3. The Add or Edit Form Fields window appears. Acrobat can detect form fields for you, click No.



4. You are in form editing mode. All the form creation tools appear in the toolbar.

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Creating Text Fields

1. Click on the Add text field option on the toolbar.



2. A vertical and horizontal line appears with a box. This helps you align the field to the appropriate position. Drag the box to where the field should appear and left click.



3. The text box will appear with the properties box open.

Personal Information								
First Name	Text1		Last Name					
Address	Field Name: Text1							
City	Required field	All Properties	StateZip					

4. In the Field Name box type the name of the field. In this example we will use First Name.

Personal Information								
First Name	Text1		Last Name					
A 11	Field Name:							
Address	First Name							
City	Required field	All Properties	StateZip					

- 5. To change the formatting of the field click on the All Properties link in the yellow box. In the Text Field Properties box you can change the following:
 - o General: you can change the Name of the text field and add a Tooltip
 - Appearance: you can add a border, border color, change the font size, type and color
 - Options: you can align the text, select how the text will appear, check spelling
 - Actions: you can execute an action to occur
 - Format: you can select from different format categories
- 6. In this example we will format the Zip field. If the yellow box is not visible right click on the text field and select properties.
- 7. Click on the Format tab.
- 8. Next to the Select format category, click on the down arrow and select Special. Select the appropriate zip code format and click the Close button at the bottom of the window.

General	Appearance	Options	Actions	Format	Validate	Calculate
Select	format categor	y: Spec	tial	•		
Spec	ial Options					
				_		
	Zip Code Zip Code + 4					
	Phone Number					
	Social Security	Number				
	Arbitrary Mask					
	Use the Sp formatting	ecial form	nat catego lisplay pho	ory to set o	up custom sers, zip/po	stal
	Use the Sp formatting codes, and	ecial form g and to d d social se	nat catego lisplay phi scurity nui	ory to set o one numb mbers.	up custom pers, zip/po	ostal
	Use the Sp formatting codes, and	ecial form g and to d d social se	nat catego lisplay pho ccurity nu	ory to set one numb mbers.	up custom bers, zip/po	stal
	Use the Sp formatting codes, and	ecial form g and to d d social se	nat catego lisplay pho ccurity nu	ory to set o one numb mbers.	up custom ers, zip/po	ostal

9. There are a number of format options that you can select from the drop down list.

Text Field Properties	×
General Appearance Options Actions Format Validate Calculate	
Select format category: None None Number Percentage	
Date Time Special Custom	
The field value will be formatted as it is entered. To format fields automatically, select a format from the Format Category list.	
	se

- 10. For a field that contains multiple lines of text, create the field and open the properties box.
- 11. Click on the Options tab
- 12. Select Multi-line and Scroll long text. Click the Close button to save your changes.
 - If you want to limit how much text can appear in the field then select Limit of and enter a number of characters.

General Anne	earance Options Actions Format Validate Calculate
ocheror rippe	
Alignmen	t: Left 🔻
Default Value	e:
	7 Multi-line
	Scroll long text
	Allow Rich Text Formatting
	Elizabet Destates
	Password
	Field is used for file selection
	☑ Check spelling
	Comb of 0 characters
	Comb of 0 characters

13. To allow for all the text that is typed into a multi-line field to appear in the field click on the Appearance tab in the Text Field Properties box and select Auto under font size.

General	Appearance	Options	Actions	Format	Validate	Calculate
Bord	lers and Colors					
В	order Color:	📐 Line	Thickness	Thin	Ŧ]
	Fill Color:		Line Style	Solid	Ŧ]
Text						
	Font Size:	Auto	•	Text (Color:	
	Font:	Helvetica				•

14. As you type in the box the text becomes smaller and smaller so that it can all fit in the box.

Comments



Preview and Edit Mode

As you are creating your form you can test it for functionality.

1. On the toolbar click on the Preview button.



- 2. You can fill in the fields and test the functionality of any check boxes that you may have created.
- 3. To continue editing the form click on the Edit button on the toolbar.

File	Edit	View	Window	Help										
	Cre	ate 🔻		B	0		<u>[T]</u>	0			(OK)	X	[8]84]] [0]23]	Keep tool selected
۲	۲	1	/1			100	% 💌		9 (E	dit)		

Select Object Tool

The Select Object tool allows you to select multiple objects at once and detect fields in a form.

- 1. To detect fields in a form click on the Select tool, located on the toolbar. The fields will appear automatically in the form.
- 2. To select multiple objects, move the pointer toward a column of text. When the pointer changes to a vertical bar with a box superimposed the Select tool is in column select mode.
- 3. Drag a rectangle over the column of text. To select text in more than one column, drag from the beginning of the text in one column to the end of the text you want to select.
- 4. In the example below we selected 3 text boxes of which some property attributes need to be changed.



- 5. Right click on one of the check boxes select properties.
- 6. Note there are some attributes you can't change for all of the boxes at one time. Appearance is a property that can be changed for all of the check boxes at once.

Creating Check Boxes

Check boxes allow users to select more than one choice/option. If you want the user to select all that apply, for example, check boxes are what you would use.

- 1. Click on the Check Box option on the toolbar and drag it to the check box.
- 2. Change the text field name.
- 3. Open the Properties box.
- 4. Click on the Options tab, click on the down arrow next to the Check Box Style and select which object you would like to appear in the box when checked.



- 5. Click on the Appearance tab. The border color is automatically set to black and the fill color is automatically set to white.
- 6. To change the border and fill color to no color, click on the corresponding boxes and select No color.

General Appearance	Options Actions
Borders and Color	s
Border Color:	Line Thickness: Thin 🗸
Fill Color:	No Color 🖉 d
Text Font Size:	Color:
Font:	
Locked	Close

Creating Radio Buttons

Radio buttons are used when a question or option should only have one answer, they are mutually exclusive. The text field, or group name, is the same for each button but the Radio Button Choice name, also referred to as the export value, is different for each choice.

- 1. Select the radio button option on your toolbar and drag it to where the button should appear.
- 2. Change the Group Name and the Radio Button Choice to reflect the information in the field. Since the field we are creating the button for asks if you are a WCU employee the group name will be employee and the radio button choice will be yes. Note the warning at the bottom of the window, there must be more than one button in the group in order for the choices to be mutually exclusive.

	Radio Button Choice: 🧻
□м	yes Group Name:
□In	employee 🗸
□Ph	Required field All Properties Warning: 1 button in group. At least 2 buttons needed.
Are	Add Another Button
e e	n Yes No

- 3. Click on Add Another Button to create the next radio button. Place the button in the appropriate position.
- 4. The group name is correct; all that needs to be changed is the Radio Button Choice.

Microsoft Word	Radio Button Choice: 🧃				
	no				
Introduction to S	Group Name:				
	employee 👻				
Photosnop	📃 Required field	All Properties			
Are you a WCU En	Add Another Button				
emr Yes	<mark>mj</mark> No				

- 5. To make changes to the button attributes click on the All Properties link or right click on the radio button.
- 6. Under the Options tab select which character you would like to have appear when the field is selected. If an option other than Circle is selected the button border will change from a round shape to a square shape.

	Button Style:	Circle
	Dutton Style	
		Check L
Radio	Button Choice:	Circle
		Cross
		Diamond
📃 But	ton is checked by	Square
🔳 But	tons with the san	Star hoice are selected in unison

Are you a WCU Employee?





Radio button fields can also be duplicated.

- 1. Create the first radio button.
- 2. Hold down the Ctrl key and drag the button to the next choice position.

Are you a WCU Employee?



- 3. Double click on the new button to open the properties box. On the Options tab select the button style. In the Radio Button Choice box change the choice name. In this case we change the choice name to No.
- 4. Click Close.

Submit Button

A submit button allows the user to submit the form via email.

1. On the Forms toolbar select the button tool. Drag the box to where you would like the button to appear on the form.



2. Name the field and click on All Properties.

Field Name:	
submit	
Required field	All Properties

- 3. On the Appearance tab click on Border Color and select a color for the border.
 - Click on Fill Color and select No Color.
 - Select the line thickness by choosing from the drop down menu.
- 4. On the Options tab type the word Submit in the Label box.

Button Properties
General Appearance Options Actions
Layout: Label only
Behavior: Invert 👻
Icon and Label
State:
Up Labels Submit
Icon: Choose Icon
Clear
Locked Close

5. On the Actions tab select Submit a form from the Select Action drop down menu.

Button Properties
General Appearance Options Actions
- Add an Action
Select Trigger Mouse Lin
Select Action: Submit a form
Add
Actions
Up Down Edit Delete
Locked Close

- 6. Click on the Add button. In the Enter a URL for this link box type in the email address that the forms will be returned to. The format is: **mailto:** <u>jdoe@wcupa.edu</u>
- 7. Check the button next to: PDF The complete document.
- 8. Click Ok.

mailto: jdoe@wcupa.edu			
Export Format © FDF Include: √ Field data	Field Selection		
Comments Incremental changes to the PDF TTML XFDF Include: Field data	Date Options		
Comments OPF The complete document	Dates are submitted in D:YYYYMMDD format instead of passing the user typed values through unchanged.		

Setting Passwords

There are two levels of password security that can be added to a PDF. The first is a password that will open the document and the second is a password that restricts editing and printing of the document.

- 1. Open the PDF, click on the File tab on the toolbar.
- 2. Select Properties.



- 3. On the Document Properties window click on the Security tab.
- 4. From the Security Method drop down menu select Security.

Description	Security	Fonts	Initial View	Custom	Advanced	d			
Document Security									
The docur restriction	ment's Sec s, set the S	curity Me Security I	thod restrict Method to N	what can Security.	be done to	the docume	nt. To rem	iove securit	у
Securi	ity Metho	d: No	Security					Change S	Settings
		No S	Security						
Can be	Opened b	y: Pass	word Securit	у				Show D	etails
		Ado	ificate Securi be LiveCvcle	ty Rights Ma	nagement				
		_							
- Document I	Restriction	ns Summ	ary						
		F	rinting: All	owed					
	Changin	g the Do	cument: All	owed					
	Document Assembly, Allowed								
		ontent (onvina: All	owed					
Content	Content Copying: Allowed								
Content Copying for Accessibility: Allowed									
Page Extraction: Allowed									
	Commenting: Allowed								
	Filling of form fields: Allowed								
Signing: Allowed									
Creation of Template Pages: Allowed									

- 5. In the Password Security Settings window select a compatibility version for the PDF. Acrobat 7.0 and later is a safe version to select.
- 6. If you want to require a password for the document to be opened then select Require a password to open the document.
- 7. To restrict editing and printing of a document select Restrict editing and printing of the document.
- 8. Type in your passwords. The bars to the right of the password box will indicate how weak or strong your password is. **Note: make sure to store the passwords in a secure location.** You will need to be able to retrieve them if you forget them.

assword Security - Settings	×				
Compatibility: Acrobat 7.0 and later					
Encryption Level: 128-bit AES					
Select Document Components to Encrypt					
Encrypt all document contents					
Encrypt all document contents except metadata (Acrobat 6 and later compatible)					
© Encrypt only file attachments (Acrobat 7 and later compatible)					
All contents of the document will be encrypted and search engines will not be able to access the document's metadata.					
Require a password to open the document					
Document Open Password:					
This password will be required to open the document.					
Permissions					
Restrict editing and printing of the document. A password will be required in order to change these permission settings.					
Change Permissions Password: ******** Strong					
Disting Allowed Name					
Changes Allowed: None					
Enable copying of text, images, and other content					
☑ Enable text access for screen reader devices for the visually impaired					
Help OK Cancel					

9. Under the Restrict editing and printing of the document you set the limitations for what can be done with the file.

Permissions					
Restrict editing and printing of the document. A password will be required in order to change these permission settings.					
Change Permissions Password	*****		Strong		
Deinting Allowed	N				
Printing Allowed:	None				
	None				
Changes Allowed:	Low Resolution (150 dpi)				
High Resolution I Enable copying of text, images, and other content					
Thable text access for screen reader devices for the visually impaired					

Permissions		
Restrict editing and printing of the d	ocument. A password will be required in order to change these permission settings.	
Change Permissions Password:	********* Strong	g
Printing Allowed:	None	
Changes Allowed:	None	
Enable copying of text, images, an	None Inserting, deleting, and rotating pages	
Enable text access for screen reade	Filling in form fields and signing existing signature fields Commenting, filling in form fields, and signing existing signature fields	
Help	Any except extracting pages OK Ca	ancel

- 10. Select the level of permission and click Ok at the bottom of the window.
- 11. A Confirm Document Open Password window will appear, confirm the password and click Ok.



12. A warning window will appear, click Ok.



13. A Confirm Permissions Password window appears. Confirm the password and click Ok.



14. Another warning window appears indicating that the security settings will not be applied until the document is saved. Click Ok.



- 15. Click Ok on the Document Properties window to close it.
- 16. Save the document for the security settings to take effect.

Enabling Usage Rights in Adobe Reader

By default Adobe Reader cannot save a filled out form. The form needs to be enabled so that the user can save the form with the data.

- 1. Click on the File tab.
- 2. Go to Save As.
- 3. Select Reader Extended PDF.
- 4. Choose Enable Additional Features.

File Edit View Window Help				
<u> O</u> pen	Ctrl+O	🗦 🤛 🖵 🔂 🗋		
Create	•			
💾 Save	Ctrl+S			
Save <u>A</u> s		PDF Shift+Ctr	I+S	
Bhare Files Using Sen <u>d</u> Now Online		Reduced Size PDF		
Attach to Emai <u>l</u>		Certified PDF		I
Provide the state of the state		Reader Extended PDF	•	Enable Adding <u>T</u> ext in Documents (that are not fillable forms)
E Action <u>W</u> izard	•	Optimized PDF		Enable <u>Commenting</u> & Measuring
Re <u>v</u> ert		Image Microsoft Word	۱.	Enable Additional <u>restates</u>
<u>C</u> lose	Ctrl+W	Spreadsheet	•	
Prop <u>e</u> rties	Ctrl+D	More Options	•	
🖶 <u>P</u> rint	Ctrl+P			
1 C:\Users\\FillableForm-example-SUBMIT.pdf				
2 C:\Szonntag Vinyl Sit Contract.pdf.pdf				
3 C:\Szonntag Shuttert Contract.pdf.pdf				
4 C:\Szonntag Patio Dot Contract.pdf.pdf				
5 C:\Szonntag gutter,sg Contract.pdf.pdf				
Exit	Ctrl+Q			

- 5. The Enable Usage Rights in Adobe Reader window appears telling you what can be done with the form. Click, Save Now.
- 6. Name the file. A good rule of thumb is to add the word **Enable** to the end of the file name or the letters **EN** so that you can distinguish that this is the enabled file.
- 7. Click Save.
- 8. To test the file, open it in Adobe Reader.