

Adobe Acrobat Professional – Creating Forms

About Acrobat Professional

Not to be confused with Adobe Acrobat Reader (which is free), Acrobat Professional can be used to create interactive forms. You must have Acrobat Professional to complete the tasks listed on this handout.

Start with MS Word

You can start out using any publishing software (Word, Publisher, etc.) – but we will use Word in this handout as most should be familiar. To begin:

- Create your document in Word, leaving room in the areas where you will later create form elements such as form fields and checkboxes.
- The following was created in Word:

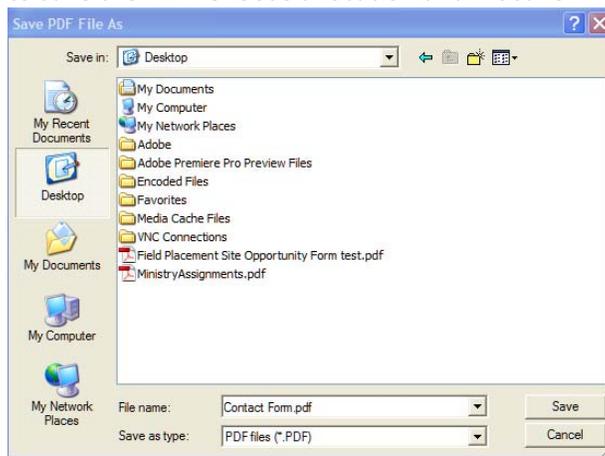
CONTACT INFORMATION FORM		
First Name:		
Last Name:		
Email:		
Phone:		
I would prefer to be contacted by:	<input type="checkbox"/> Email	<input type="checkbox"/> Phone
My Role at Xavier:		
Thank you for your contact information!		

Convert to a PDF

- First, be absolutely sure that the empty form is just as you'd like it. Once you convert to a PDF it will be difficult to make any major changes.
- To convert the Word document into a PDF: In MS Word 2007, choose the  **Office Button > Print**.
- When the print dialog box appears, instead of choosing a printer, choose '**Adobe PDF**' from the Printer drop-down menu.



- If 'Adobe PDF' is not an option available from this list, then you most likely do not have Adobe Acrobat Professional installed on your machine. Install Acrobat Professional and come back to this point.
- Hit **OK**.
- You will then be prompted to choose a location to save the PDF. Choose a location and hit save.



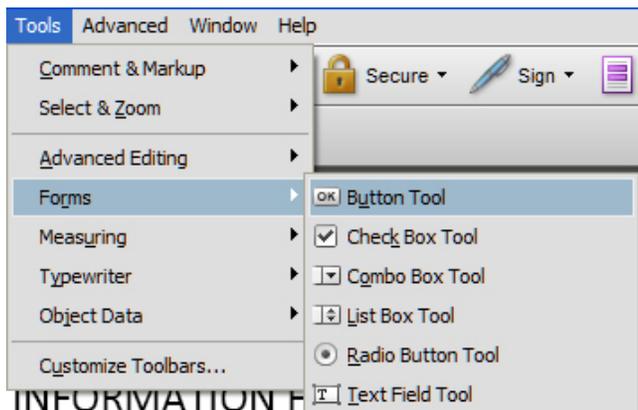
The PDF document will be saved in the location of your choice. Acrobat will then automatically open the file for you to view.

Create the Form Elements

- Once your PDF document opens (automatically or you can browse for the file and open it in Acrobat Professional), you can begin adding in the form elements.
- It is important to know that you must start at the top of your document and create the form elements in the order they will be used. The order you create the form elements in will also be their tab order.
- In Acrobat, choose **Tools > Forms**. You will see there a list of form elements to choose from.

Adobe Acrobat Professional – Creating Forms

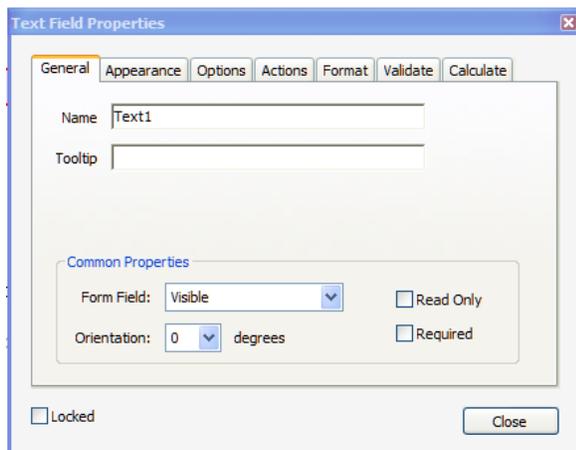
- In this handout, we will use four of these form elements: the text field tool, the radio button tool, the checkbox tool, and the combo box tool.



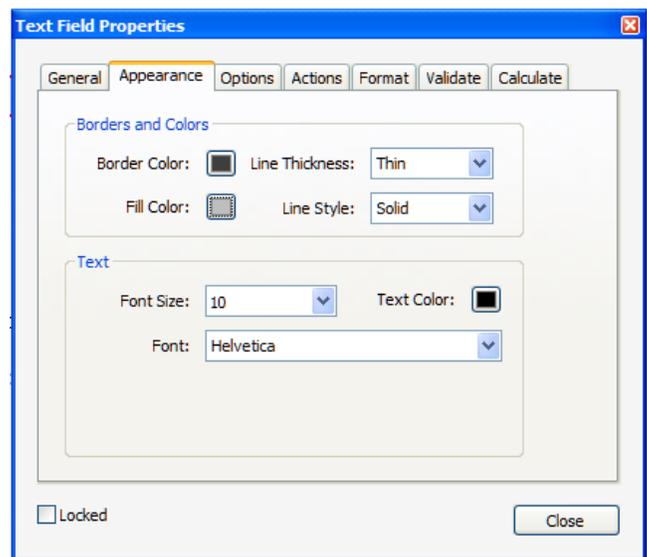
- The first four fields of our form will require text fields (and we need to create the form in order), so we will start there.

Text Field Tool

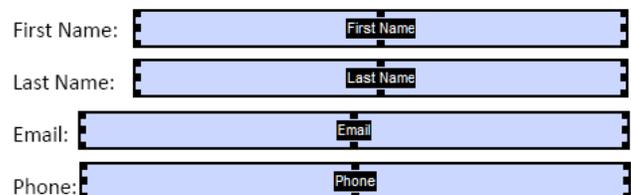
- To use the text field tool, choose **Tools > Forms > Text Field Tool**.
- A cursor tool will appear for you to draw the size and location of your text field.
- Once you draw the text field, the Text Field Properties box will appear.
- First, under the **General** tab, give the text field a name. *Important: Each text field must have a unique name. If they do not have a unique name what the user types into one field will also appear in the other field(s) of that name.*



- You may also choose to provide a tooltip, or pop-up text that will provide the user with additional information.
- Under the **Appearance** tab, choose whether you would like the field to have a border and/or fill color.
- Choose the font size (it is not recommended to choose Auto). A font size of 10 will usually work well. Also choose a font family.



- Hit **Close**.
- You will see your text field on the document. You can click on it and move it or change its size if you'd like. Simply click on the edges and drag in to resize.
- To save time you can copy and paste the text field. Just be sure to open each one and give it a unique name.
- To copy, select the text field and choose **Edit > Copy** (or hit Control + c). Then choose **Edit > Paste** (or hit Control + v).
- Click and drag each field to put it in the appropriate place. Double click on each text field to give it a unique name in the Text Field Properties box.



Adobe Acrobat Professional – Creating Forms

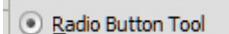
- To test out your text field boxes, choose the **Select tool** or the **Hand tool**. You will then see the form as the user will.



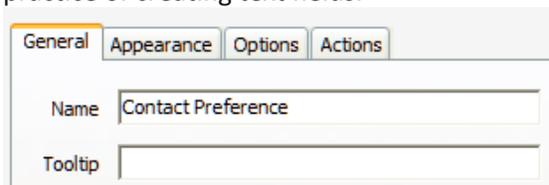
- To then edit the text fields, go again to **Tools > Forms**, and choose **Text Field Tool**.

Radio Button Tool

- The **radio button** makes it possible for the user to choose from several options, but they are restricted to only once choice. This is different from the **check box** where they can choose from several options but they can make multiple choices.
- The next piece of our form, where we ask their preferred contact method, could potentially be a radio button or a check box. We will show you how to create both.
- To create radio buttons, go to **Tools > Forms**, and choose **Radio Button Tool**.

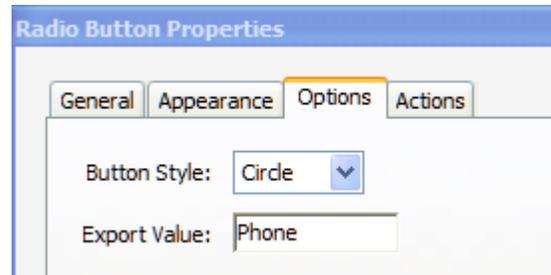


- You will be given a special cursor to draw the radio button on the page. Do so and the Radio Button Properties box will appear.
- Give the radio button a name. The radio buttons within a set of radio buttons should all have the same name. This is different from the practice of creating text fields.



- Under the Options tab, choose the export value. In this case, our first button will be the value “Email”.
- Hit Close.
- Create a copy of the radio button. To copy, select the radio button and choose **Edit > Copy** (or hit Control + c). Then choose **Edit > Paste** (or hit Control + v).

- Move the radio button to its appropriate location.
- Double click on the new radio button.
- Be sure that this second button has the same name as the first.
- Under the Options tab, choose the export value. In this case, our second button will be the value “Phone”.

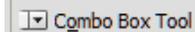


Check Box Tool

- The check box tool works the same way as the radio button (see the difference in this handout under ‘Radio Button Tool’).
- To create a checkbox instead of a radio button, go to **Tools > Forms**, and choose **Check Box Tool**.
- From there follow the steps listed under the radio button tool (above).

Combo Box Tool

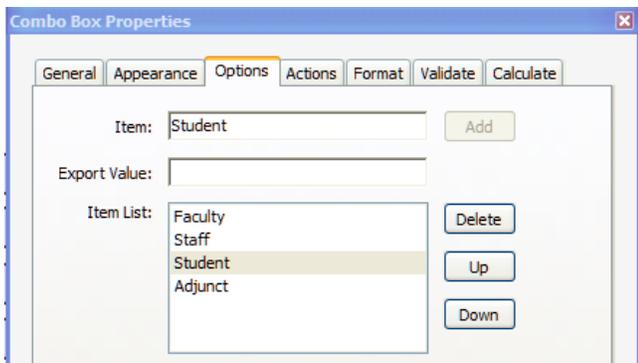
- The combo box is essentially a drop-down menu.
- To create a combo box, go to **Tools > Forms**, and choose **Combo Box Tool**.



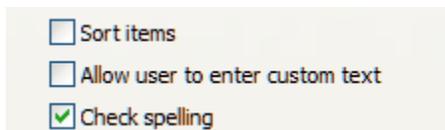
- You will be given a special cursor to draw the combo box on the page. Do so and the Combo Box Properties box will appear.
- Give the combo box a name.

Adobe Acrobat Professional – Creating Forms

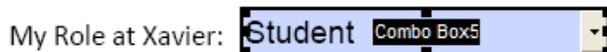
- Next, you will need to fill the combo box with possible choices. Under the **Options** tab, type the first Item. Click **Add**.
- Repeat and the Item list will become populated with the options that will appear in the drop-down menu.



- Select an item in the list and choose Up or Down to change its order in the list.
- Some of the options you have next are:
 - **Sort items** (will sort the list alphabetically)
 - **Allow user to enter custom text**
 - **Check spelling**



- Click **Close** when finished.
- You will see your combo box on the page. You can click and drag to move it or adjust its size but clicking and dragging the edges.



Trying Out Your Form

- To try out your form, choose the **Select tool** or the **Hand tool**. You will then see the form as the user will.



CONTACT INFORMATION FORM

First Name:

Last Name:

Email:

Phone:

I would prefer to be contacted by: Email Phone

My Role at Xavier:

Adjunct
 Faculty
Staff
 Student

Thank you for your