UFHealth
INFORMATION TECHNOLOGY TRAINING

Adobe

Adobe Acrobat Pro DC Form Fields

Version 2019.021.20061

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Adobe Acrobat Pro DC: Form Fields

1.0 Hours

This workshop uses the Adobe Acrobat Pro DC edition Version 2019.021.20061. Depending on what version and what edition you have things could look VERY different.

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Forms

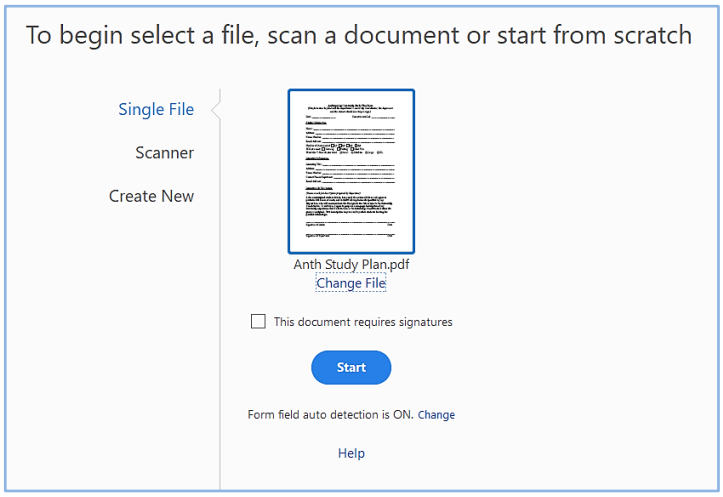
We use forms all the time for gathering information. Many forms are created in programs like Word or in a design program such as InDesign or Publisher. These forms look great and are good if you want to print the form out and fill it in, but more frequently we want the ability of creating the forms, 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 **P**ortable **D**ocument **F**ile) and you are ready to add form fields.

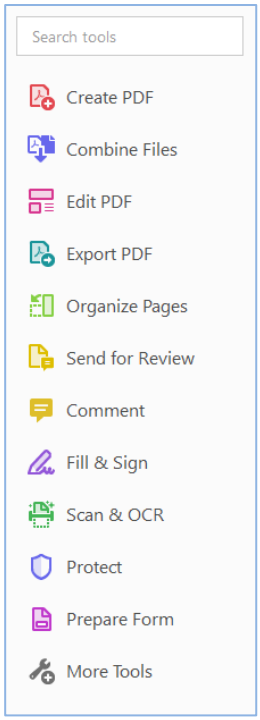
You will have to add form fields to your .pdf document so it will be usable by others. If your form has been created in MS Word, save as a .doc file in the same folder that you plan on saving your .pdf file. This will give you a copy of the file that can be amended and altered as needed. Another way 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

Making an interactive form is as easy as 1, 2, 3.

1. Open the .pdf form
2. Click Prepare Form
3. Choose Start

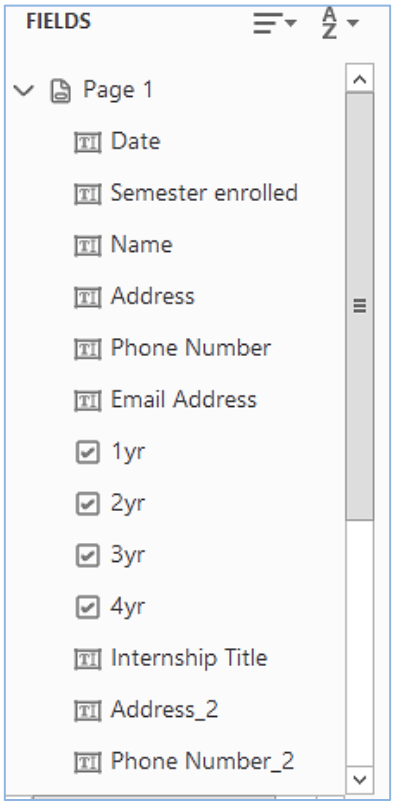


Now we have a fillable and interactive form. At this point we can save and use it or we can further refine it and fix any problems it may have.

Forms Toolbar

Tools

- Text Field - User can type in information requested.
- Check Box - User can choose one or more options.
- Radio Button - User can make a single choice among several options Combo Box - User can choose from a list or enter custom information
- List Field - User can choose one or more choices in a list
- Combo Box – User can choose one or be allowed to enter their own text
- Button Field - Initiates actions such as clear form, submit form, print form.
- Image – User can add an image.
- Date – User can click on a drop-down arrow use the date picker.
- Digital Signature - Creates a special field to add a digital signature to the document
- Barcode Tool - Add barcode to the document
- Keep tool selected – Allows you to create multiples of the same field type The Forms toolbar appears when you open a form or choose **create or edit** from the **Tools** > **Forms** pane.



Fields Pane

With this task pane showing, you can adjust Tab order by dragging a dropping fields into order.

Add Form Fields to the .pdf document

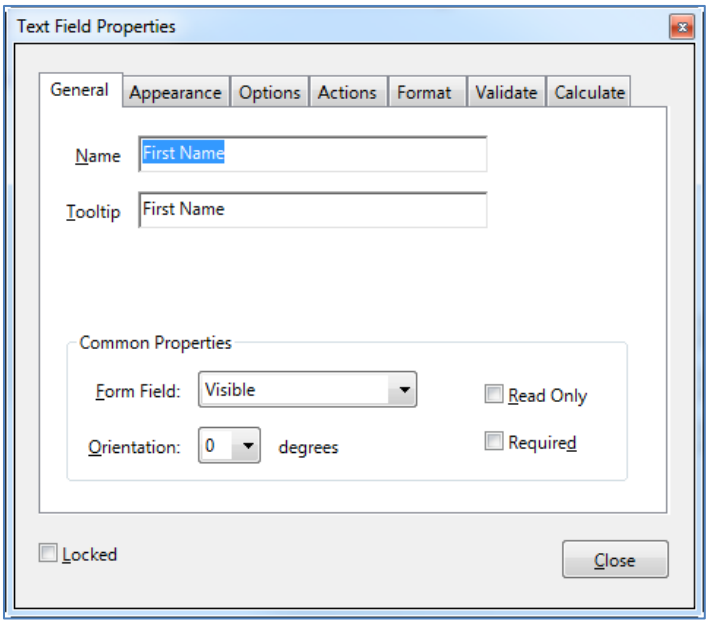
To add the fields to your form document:

- 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

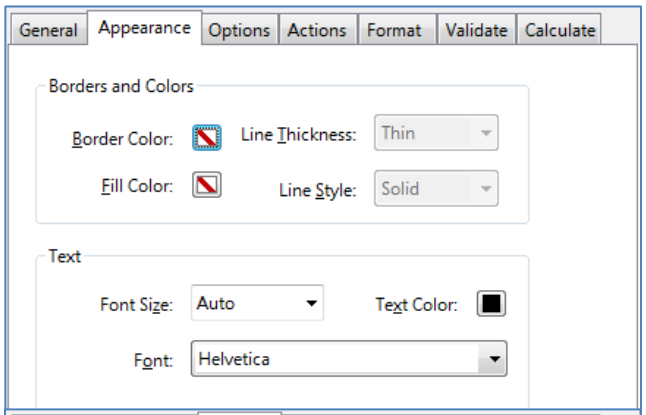
Field Properties

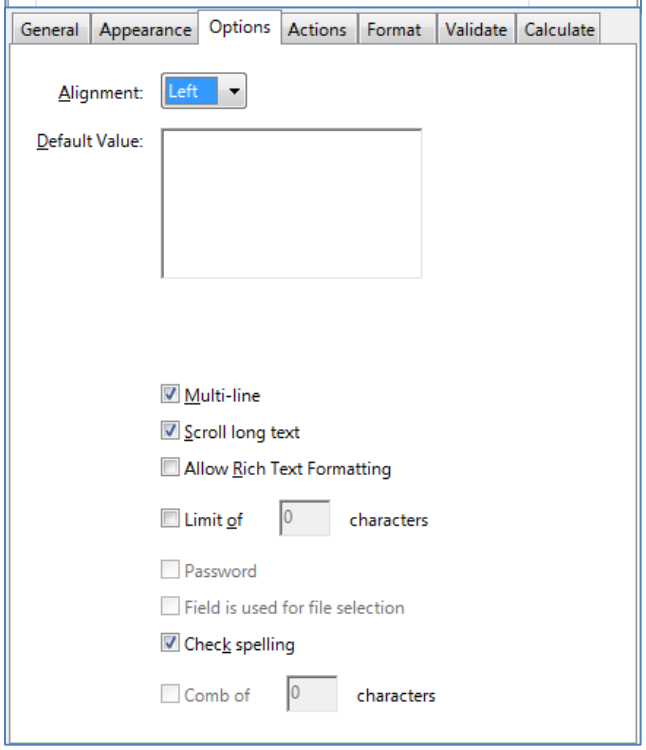
The dialog boxes for the field properties are content sensitive, so different boxes will be available or offer different options depending on the field you have chosen to add. Field Properties box offers different tabs to choose from offering different design attributes.



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.

Actions Tab

Actions can be added to form fields.

An action could be opening another file or going to another page in a document.

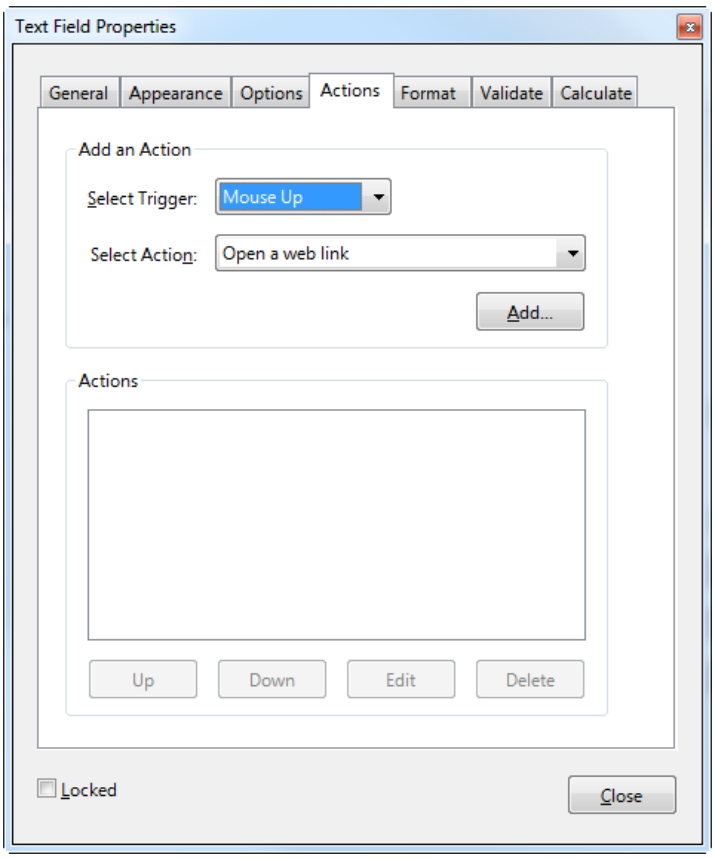
An action must have both the trigger to cause the action and the action.

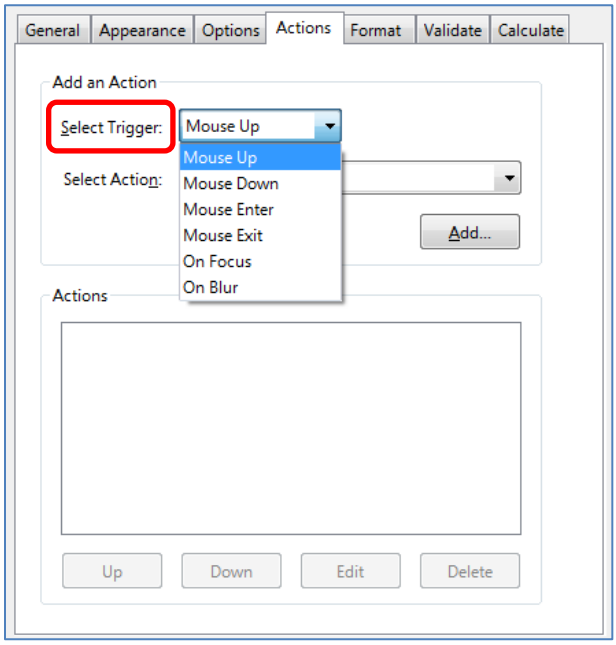
Each of these items must be defined.

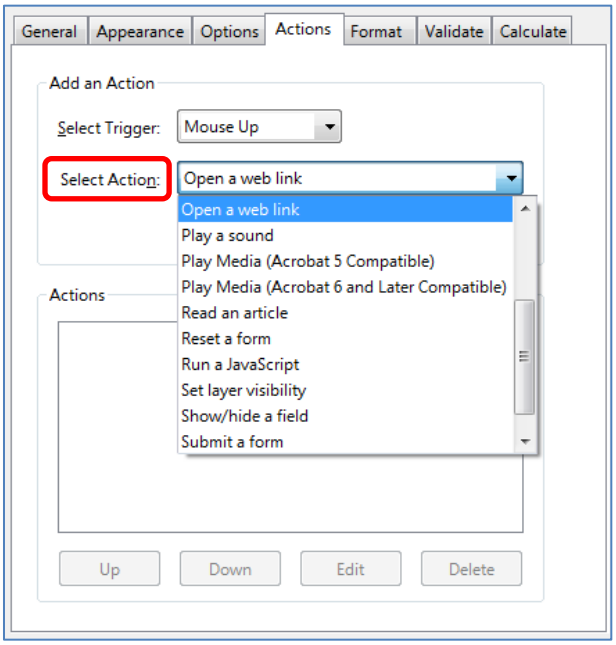
Use the drop down menus to define your actions and triggers.

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

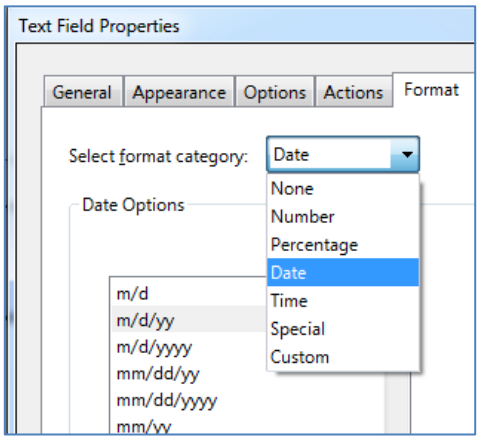
The format category allows formatting of the information that is to be entered to be set to a specific standard.

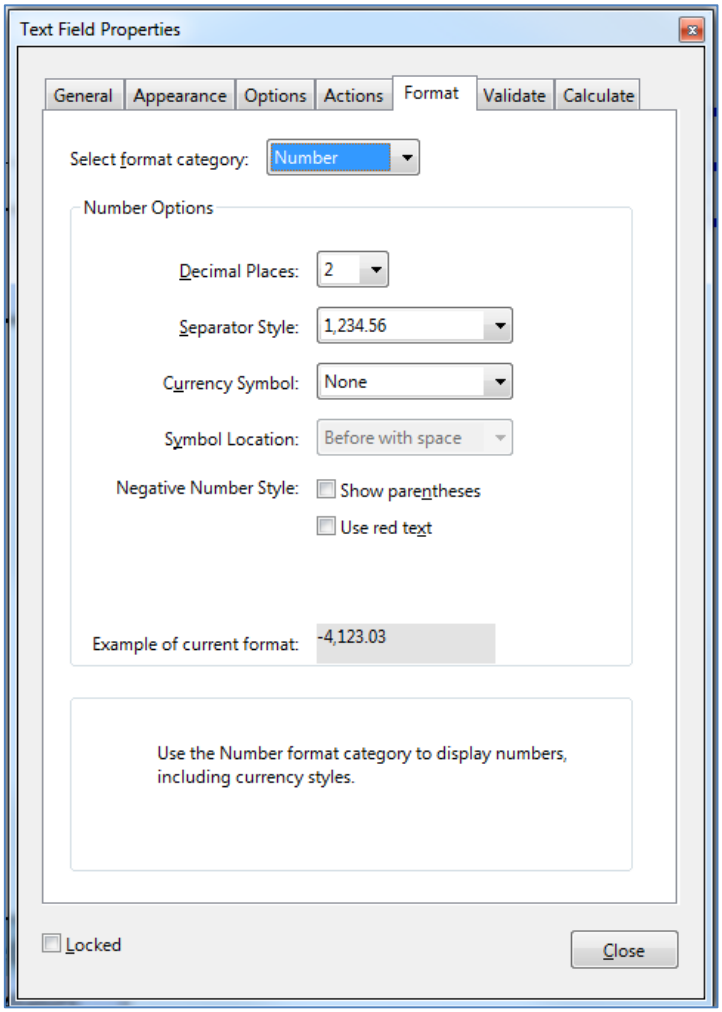
Use the drop down menus to set these formats.

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.





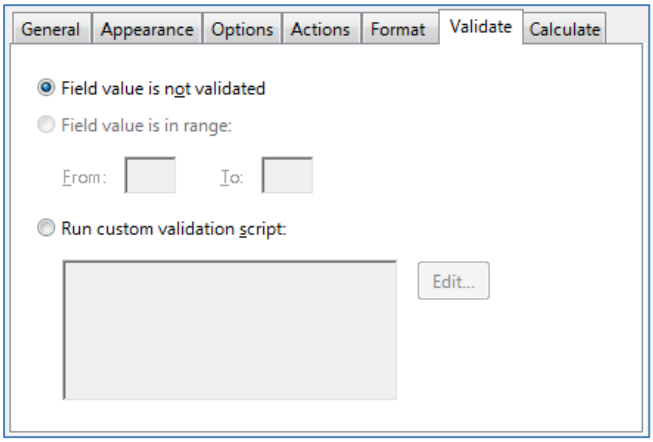
Validate Tab

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

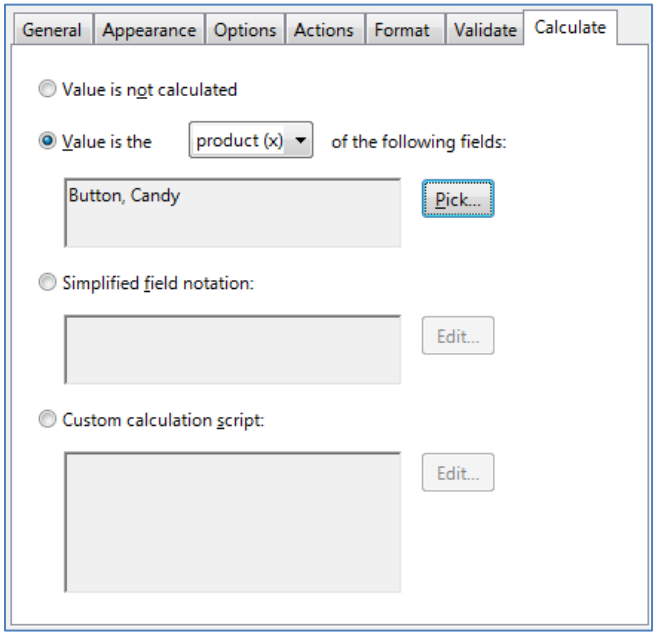
Form fields can be used to perform some mathematical calculations.

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

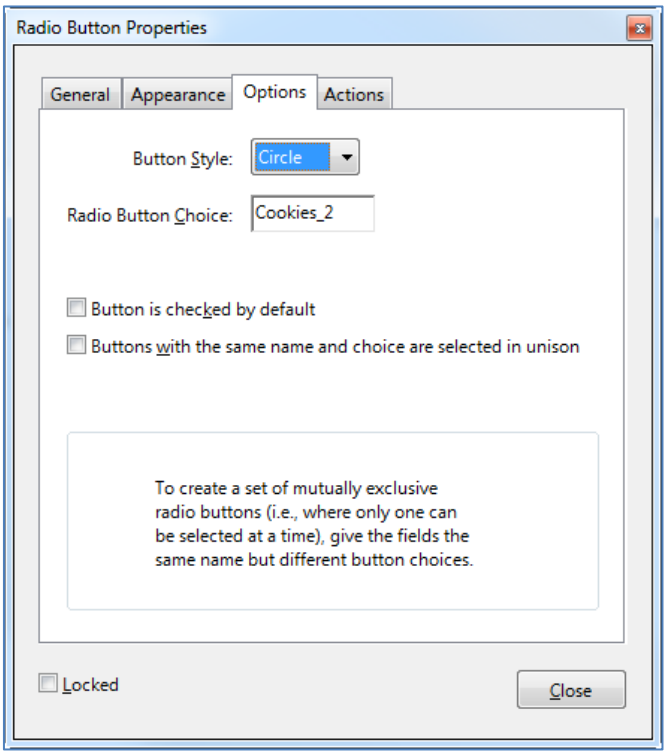


Radio Buttons

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 middle 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.

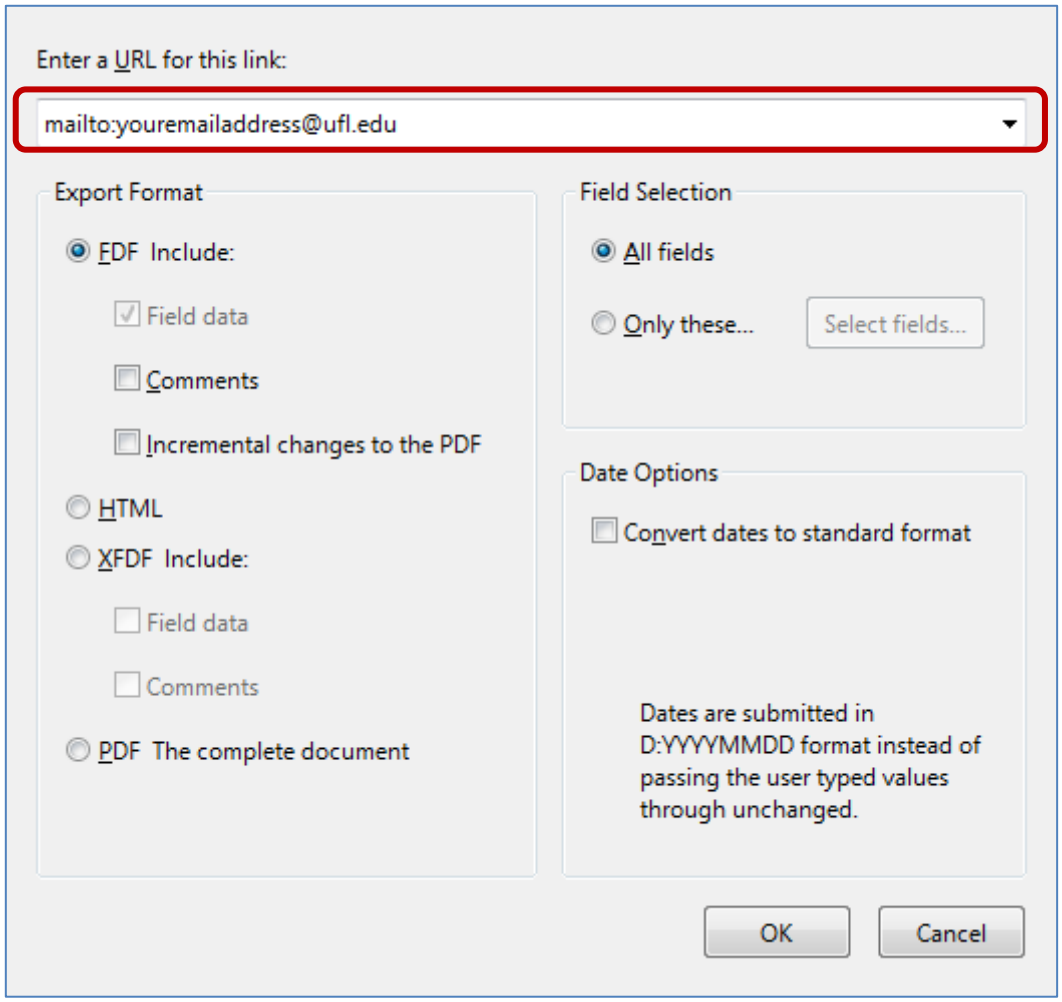
Export values are the information sent to a data file or a database. Each export value needs to be different.

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.



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 semicolon (;) 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.