

Acrobat 9.0: Forms

Learning Guide

Why use Acrobat forms?

Every department uses forms to collect information from faculty, students, and staff. Often, these forms are distributed in paper format and returned with illegible handwritten notes covering each area of the form. In other situations, forms are distributed as Word documents whose formatting can deteriorate as respondents draft their answers to each question.

Forms created with Acrobat, on the other hand, allow your respondents to type readable responses without changing the layout of the form. Respondents can print their completed form and easily deliver it to your office or send it by campus or US Mail. The end result is increased ease of use for the people filling out your forms, and greater ease of data collection for your department.

Although Acrobat allows you to create seven different types of fields, the most common are text fields, combo boxes, and check boxes.

Use this field...	For...
Text field	A text-based, narrative, or multi-line response; for example, names, addresses, explanations, etc.
Combo box	Choosing one of a small group of responses; for example, Tufts status (faculty/staff/student), academic program within a department, etc.
Check box	A yes/no response to a prompt, where a checkmark indicates a "yes" answer; for example, "Make me a web-based learning account."

Getting Started

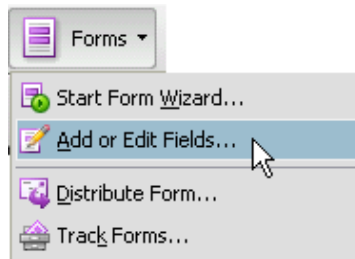
Since you cannot compose or design documents in Acrobat, you will need an existing document (most often created in Word) to serve as your form. Once you've finished designing your form & converting it to an Acrobat document, you can begin adding fields to contain the text entered by the people who use your form. To open your document in Acrobat:

- From the **File** menu, select **Open**.
- Navigate to the folder where you saved the Acrobat document that will serve as the basis of your form.
- Click on the name of your document to select it.
- Click on the button labeled **Open**.

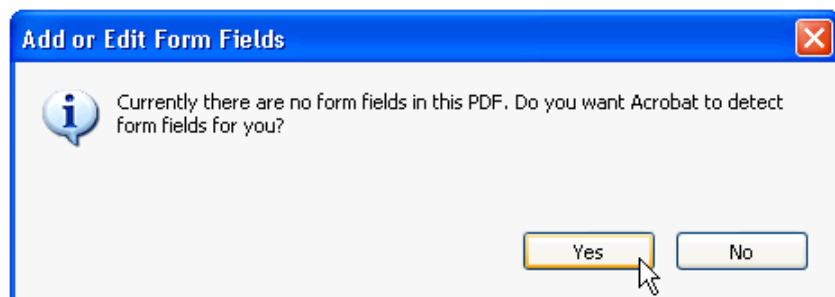
Adding Form Fields to your Form

To add a form field to your form:

- Click on the **Forms** button and then click on **Add or Edit Fields**



- If this is a new document, Acrobat will ask to detect currently-existing fields. Click **Yes** to permit this.



- The **Fields** pane will now appear on the left side of the document. You are now in **Form Editing** mode.

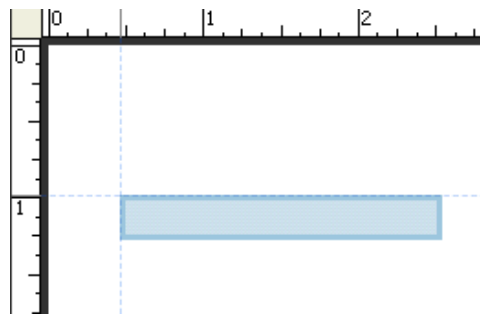
Creating a Text Field

Text fields are the most common field type because they can contain answers to many different kinds of questions. If you are not sure what type of field you need for a particular question, create a text field. To create a text field:

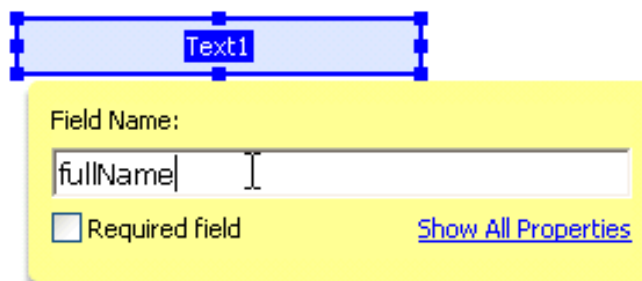
- While in **Form Editing** mode, click on the **Add New Field** button and from the resulting menu click on **Text Field**.



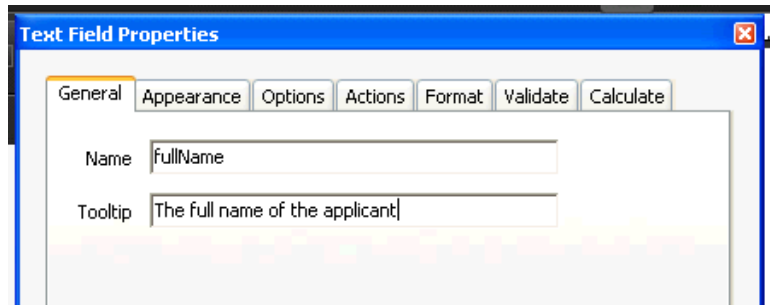
- Move the cursor in the area of your document where you wish to insert the text field. In lieu of a cursor you will see the outline of a light blue rectangle.
 - You can use the blue dotted lines with the rulers to precisely place your text field.



- Click the mouse once to insert the text field.
- You will be prompted to rename your text field. Give a name to your text field and insert it into the yellow dialogue box. Click outside of the dialogue box to save the field name and remove the dialogue.



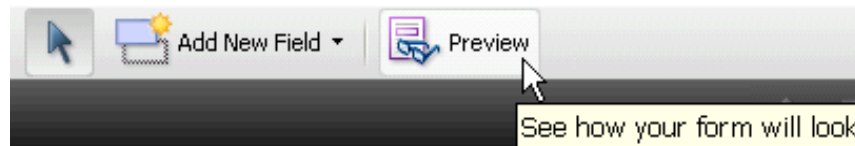
- Double-click on the text field to continue editing the **Text Field Properties**.



- In the box labeled **Tooltip**, type a short description of the contents that will be entered in the field.
- Click on the button labeled **Close** to finalize your field.

Tip: Previewing your form field

Once you've created a form field, you'll need to click on the **Preview** button to see the field the way the users of your document will see it.

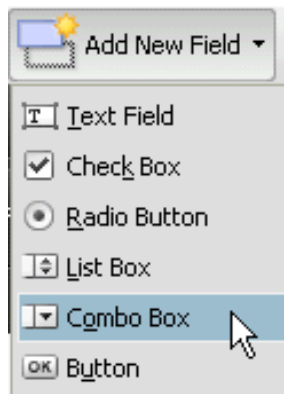


Creating a Drop-Down Menu

Acrobat allows you to create drop-down menus (called **combo boxes**) that allow the users of your form to choose one of a group of possible answers in response to your question.

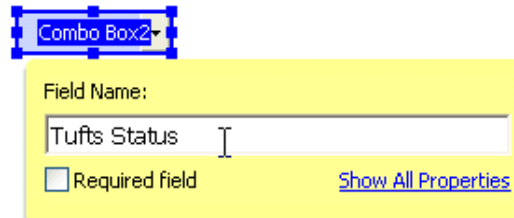
Creating a Combo Box Field

- While in **Form Editing** mode, click on the **Add New Field** button and from the resulting menu, click on **Combo Box**.

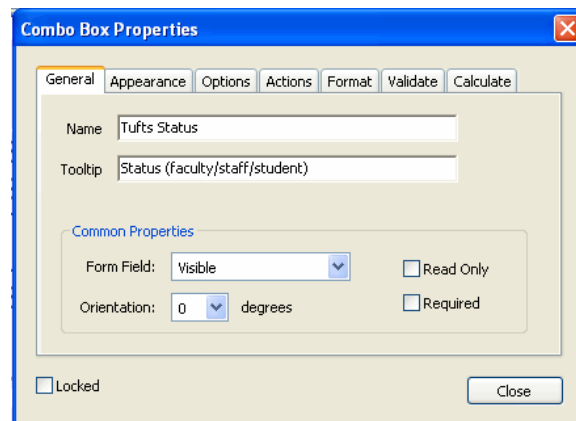


- Move your cursor to the area of your document where you wish to insert your combo box field.

- As with text fields, the cursor will show up as a light blue rectangle with dotted lines for positioning.
- Click in the area of the document where you would like to insert the combo box.
- A blue rectangle will be inserted, representing your combo box. Rename your combo box and then click outside the dialogue box.



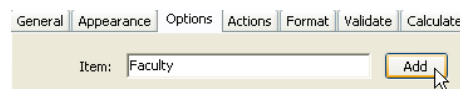
- Double-click the combo box to edit the **Combo Box Properties**.



- Click on the tab labeled **General**.
- In the box labeled **Tooltip**, type a short description of the contents that will be entered in the field.

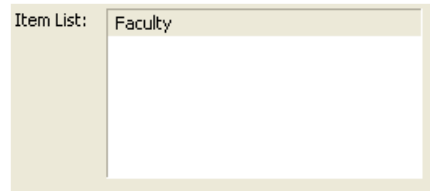
Creating Menu Items

- On the **Combo Box Properties** window, click on the tab labeled **Options**.
- In the box labeled **Item**, type the name of the first menu item you wish to appear in your combo box.
- Click on the button labeled **Add**.

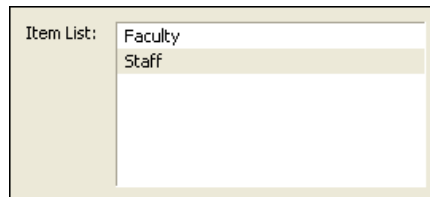


Adding Additional Menu Items

- In the box labeled **Item**, type the name of the second menu item you wish to appear in your combo box.
- Click on the button labeled **Add**.
- The first menu item will appear in the box labeled **Item List**.



- The second menu item will appear in the box labeled **Item List**.

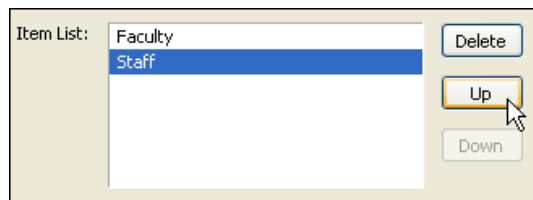


- Use the previously described techniques to add more menu items to your combo box.
- Click on the button labeled **Close** once you have finished adding menu items to your combo box.

Reordering your Menu Items

Often times you will want to arrange your menu items in a different order from how they currently appear. To reorder your menu items:

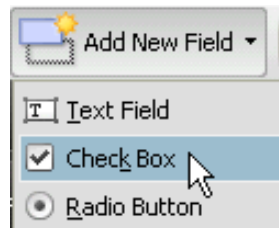
- From the **Item List**, click on the item you wish to relocate.
- Click on the buttons labeled **Up** or **Down** to move the item to the location you wish. *Your menu item will automatically move once you click either button.*



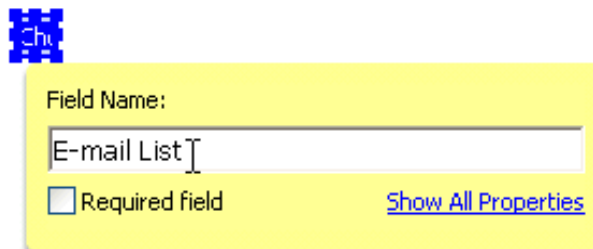
Creating a Check Box

In many situations, the answer to a prompt or question will be either yes or no. In those cases, a checkbox will allow the user of your form to quickly record his/her answer to one of your questions by clicking in the box. To create a checkbox:

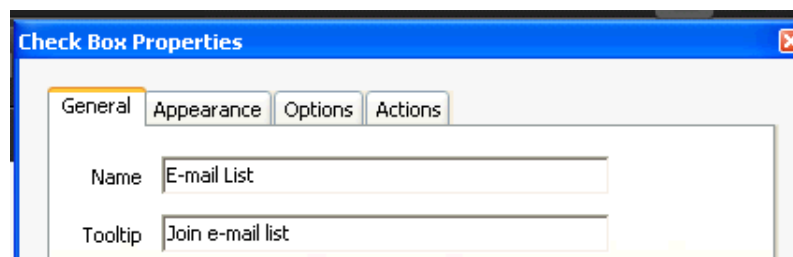
- While in **Form Editing** mode, click on the **Add New Field** button and from the resulting menu, click on **Check Box**.



- A blue square will appear in lieu of a cursor.
- Click in the area of the document you wish to insert the check box.
- A square box with a blue border will be displayed to show you what your check box will look like. Use the yellow dialogue to give it a name.



- Double-click on the check box to edit its **Check Box Properties**.



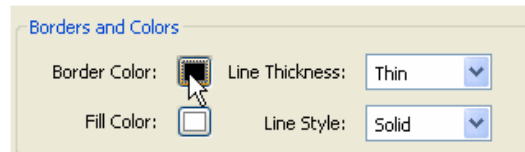
- In the box labeled **Tooltip**, type a short description of the contents that will be entered in the field.
- Click on the button labeled **Close** to finalize your checkbox.

Adding a Border to Your Text Field

- Double-click on the field you wish to format.
- From the Field Properties window, click on the tab labeled **Appearance**.

Choosing the color of your border

- In the **Border** area, click on the colored box next to the label **Border Color**.



- From the menu of colors, click on the color you want your border to be.



Choosing the thickness of your border

- Click on the down-facing arrow next to the box labeled **Line Thickness**.
- From the drop-down menu that appears, select the thickness you want to apply to your border.



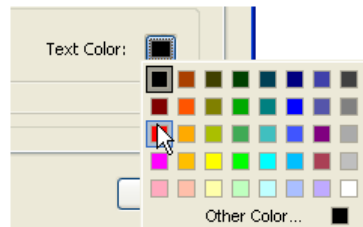
- Click on the button labeled **Close** to apply the color and width selections to the border of your text field.

Formatting the Contents of Your Text Field

Often, you will want to format the text within your field for maximum readability. Acrobat allows you to specify the color, font, and size of the text entered by the users of your form.

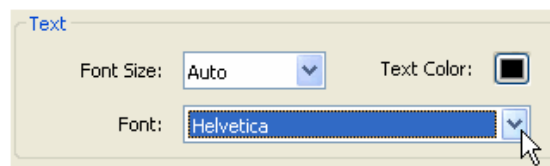
Specifying the color of the text within the field

- Double click on the text field.
- The **Field Properties** window will appear.
- Click on the colored box labeled **Text Color**.
- From the drop-down menu that appears, select the text color for any content entered into your field.



Specifying the font of the text entered in your field

- Double click on the text field.
- The **Field Properties** window will appear.
- From the window, click on the down-facing arrow next to the box labeled **Font**.
- From the drop-down menu that appears, choose a font for the text in your field.
- To specify the size of the text entered in your field, click on the down-facing arrow next to the box labeled **Font Size**.
- From the drop-down menu that appears, choose a size for the text in your field.



- Click on the button labeled **Close** to finalize the formatting changes that you've made.

Tip: Saving your form

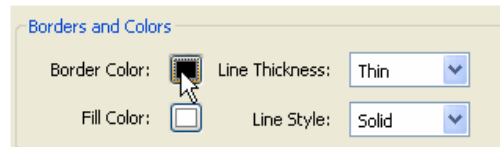
As you make changes to your PDF document, remember to save the document.

Formatting your Menu or Checkbox

- Double-click on the combo box or checkbox you wish to format.
- From the **Field Properties** window, click on the tab labeled **Appearance**.

Choosing the color of your border

- Click on the colored square to the right of the **Border Color** label.



- From the drop-down menu that appears, click on the square containing the color you want to apply to your border.



Choosing the thickness of your border

- Click on the down-facing arrow next to the box labeled **Line Thickness**.
- From the drop-down menu that appears, select the thickness you want to apply to your border.

