

Creating Interactive PDF Forms



Creating Forms with Acrobat Pro

Start with a document created in Word or other authoring tool (it might already exist). Convert it to a PDF and then use Acrobat to create the interactive forms fields. Like a crossword puzzle – the structure and directions or clues are already there from the authoring tool and you create the spots in Acrobat for the user to type in the words.

Before you start, make sure that your Forms Toolbar is displayed: View > Toolbars and make sure the Form toolbar is checked.




1. Text Fields


- a. Open the PDF that you want to convert to a form
- b. If the PDF already contains some form fields, use the Highlight Fields button to show the existing fields
- c. Add a Text Field (zoom in first)
 - i. Click on the Text field tool on the Form toolbar 
 - ii. Click and drag a box where you want users to enter the field
 - iii. General Tab – assign a name and tooltip. Decide if the field is a Required field.
 - iv. Appearance tab – choose Border Color, Fill Color and set font size
 - v. Options tab – set alignment. For large comment type text boxes, choose Multi-line. For smaller text boxes, set a limit of the number of characters
 - vi. Format tab – Choose the format category, such as none for text, number or date. Use the Special category for phone numbers (does formatting of the 10 digit number for you)
- d. Repeat steps to create each Text Field. Fields may be copy and pasted to save time but each field must have a unique Name (on the General tab).
- e. Formatting multiple text fields at the same time
 - i. Using the Select tool  (on the Advanced Editing Toolbar), select all the form fields you want to change
 - ii. Right click on any one of them and go to Properties
 - iii. Set the Appearance and Option settings as above. The changes will apply to all fields selected.

2. Check Boxes – allows multiple selections


- a. To make it easier to line up Check Boxes and the relevant text, View > Grid. To change the size of the grid, Edit > Preferences > Units & Guides to .25 inches or other measurement.

- b. Add a Check Box Field
 - i. Click on the Check Box tool on the Forms Toolbar 
 - ii. Click and drag the check box on your form
 - iii. General tab – assign a name and tooltip
 - iv. Options tab – Check Box Style – Check. Make sure the Check Box is Checked by Default is deselected unless you want it to be selected by default.
- c. To easily generate additional checkboxes, either select the Check Box and CTRL-drag to duplicate the box for additional selections or right click and select Place Multiple Fields and drag them into the right locations
- d. Double click each of the new boxes and change the Name


3. Radio Buttons (can only select one option)

- a. Click on the Radio Button tool on the Forms toolbar 
- b. Click and drag the size of Radio Button you want on your form
 - i. General tab – type the Name and enter a tooltip
 - ii. Options tab – choose Button Style and set Export Value to the response for the button (such as Yes or No)
- c. Duplicate the Radio Button for additional selections by Copy and Paste. DO NOT USE PLACE MULTIPLE FIELDS.
- d. Double click each one and set the Export Value on the Options tab to the response for that button. (DO NOT CHANGE THE NAME OF THE FIELD ON THE GENERAL TAB. This is how the program knows that you are dealing with a set of radio buttons.)

4. Combo Boxes and Lists


- a. Click on the Combo Box tool on the Forms toolbar 
- b. Click and drag the size of Combo Box you want on your form
 - i. General tab – Enter Name and Tooltip
 - ii. Appearance tab – set border and fill colour
 - iii. Options tab – enter list of items that you wish to appear on the drop down list. Change the order if necessary. Choose whether to “Allow user to enter custom text”. Choose a default item.

5. Adding a Clear (or other) button

- a. Click on the Button tool on the Forms toolbar 
- b. Click and drag the size of Button you want on your form
 - i. General tab – Enter Name and Tooltip
 - ii. Appearance tab – set Border Color and Fill Color
 - iii. Options tab – For Layout, select Label Only. Type the text you want to appear on the Button in the Label: field.
 - iv. Actions tab – Select Trigger of Mouse Up, for Select Action, choose the action you want for the button from the drop down list and click Add
 - v. Depending on the action, you will need to complete a dialog box

- c. To create additional buttons with the same appearance, copy and paste the button and then change the General, Options and Actions tabs
- d. To change the action performed by the button, double click on the button , choose the Actions tab, select the Action and click Edit.

6. Calculating numeric fields

- a. With the Select tool , double click on the field where you want the calculation
- b. On the Calculate tab of the properties dialog box, select the Value Is button
- c. Select an operator such as Sum (+) or Product (x) from the drop down list
- d. Click Pick to choose which fields to sum or multiply

7. Saving a version enabled for users of Adobe Reader – this is required if the form will be filled out by users who do not have Acrobat installed on their computer – only Adobe Reader.

- a. Advanced > Enable Usage Rights in Adobe Reader
- b. Save now (save as a separate file)

Distributing Forms

Using Acrobat to distribute forms provides several advantages. The emails are automatically formatted and sent so that it is quite clear to the person receiving the email as to what to do. When the person fills out the email and clicks Submit, the response is automatically sent back to you. When you receive the response and open the attachment, the response is automatically added to the collected data. This data can then be reviewed in Acrobat. It can also be exported into Excel. The whole process is streamlined from one end to the other.

1. Distribute the form

- a. Click Distribute on the Forms toolbar (or Forms > Distribute Forms). This step creates a collection file for you to tabulate responses. It is a good step to do even if you are posting the form online for users to fill out and submit.
- b. Send form to email addresses of recipients.
- c. As responses are emailed back to you, open responses and add data to collection file. (The program prompts you to do this.)

2. Review results

- a. Open the collection file and review responses
- b. Export the responses as a CSV file and open in Excel