



# Adobe Acrobat:

## Creating & Building Interactive Forms

*Learning Guide*



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# Tips, Timesavers & Takeaways

## Bonus Resources

As an extra bonus, additional Adobe Acrobat resources, a keyboard shortcuts handout, and other helpful tips are waiting for you at:

[TheSoftwarePro.com/Acrobat](https://TheSoftwarePro.com/Acrobat)

## Creating Interactive PDF Forms

There are two main ways to create a form in Acrobat:

- Scan an existing paper form into Acrobat  
-OR-
- Open an existing document with a form layout, such as a Microsoft Word table layout, and then use Acrobat's forms tools to add interactive form fields. Depending on the structure of the file, Acrobat will attempt to add fields into the form layout.



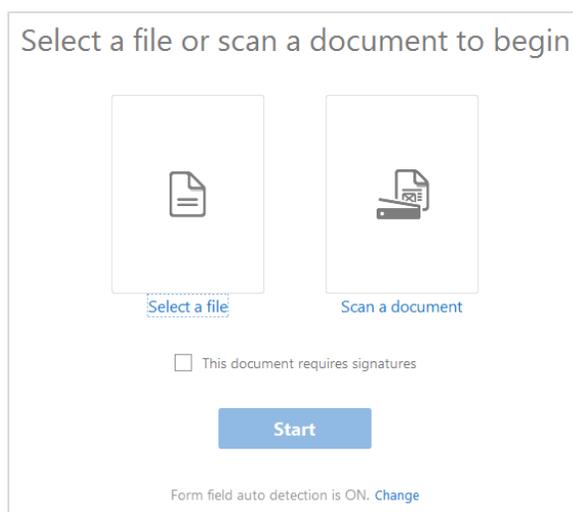
This conference session showcases Adobe Acrobat DC, the latest version of Acrobat. Although similar features are available in Acrobat XI, the steps may be different for specific topics.

The Forms Central application in Acrobat XI is no longer supported with Acrobat DC.

### Creating a Form

To create a form:

1. **Tools > Prepare Form.**
2. Optionally, open a file you want to convert to a form.
3. Choose the source of the new form: **Select a file** (or **Change File**) or **Scan a document**.

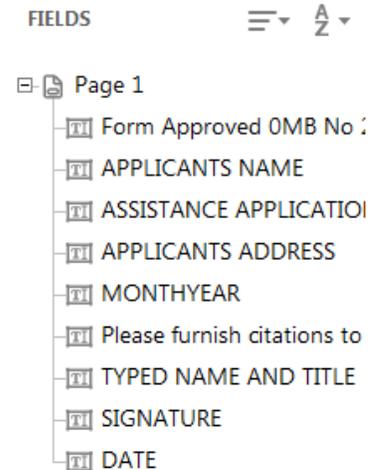


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4. After you choose an option, Acrobat scans for objects that look like form fields. Acrobat displays a progress bar and spends some time converting and importing the document. Its **form field auto detection** feature analyzes the file and automatically places appropriate form fields on the new PDF page. Although this is usually a fast process, some forms can take a long time so don't cancel the process until at least a few minutes have elapsed.
5. When Acrobat is finished processing the file, it presents you with a new form in the Form Editor. Objects that look like form fields are displayed in the **Fields** panel.

The PDF pages may have new form fields already in place; clicking any of these fields presents you with a rectangular border with the usual handles. All of these fields can be modified or deleted.

<b>Full Name:</b>	Full Name
<b>Primary Phone Number:</b>	Primary Phone Number



If your document includes a table created in Microsoft Word, the Form Wizard will detect the table cells as text fields.

This is usually an excellent start but you'll probably need to add some additional form fields manually using the **Forms** panel.

6. Resize and reposition the existing form fields so they fit the page's formatting and layout appropriately.
7. When you are finished adding fields to your form, click the **Preview** button to view your form.

## Editing an Existing Form

### To edit a form:

1. **Tools > Prepare Form.**
  2. Select **Edit** to open the form editing functionality in Acrobat.
  3. When you are done adding form fields and editing a form, pick **Preview**.
- OR-
1. Press **[Shift] + [Ctrl] + 7** to open and close the form editing view.

## Layout Tricks

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To simplify the layout and alignment of objects, graphics, and form fields, try these layout tools in Acrobat.

### Layout Grid

Use the Layout Grid to provide a visual reference while creating and aligning form fields and other PDF objects.

**To enable the Layout Grid:**

- **View > Show/Hide > Rulers and Grids > Grid**  
-OR-
- **[Ctrl] + U**

Rulers are also enabled when you add or edit form fields.

### Snap to Grid

When you enable the Layout Grid, you can visually align and size items to intersecting grid points. Use any of the Viewing tools to zoom in on your work. For exact alignment and sizing, turn on the Snap to Grid feature which causes any object you create to snap or align to the grip points.

**To turn on Snap to Grid:**

- **View > Show/Hide > Rulers and Grids > Snap to Grid**

### Rulers and Guides

**To turn on Rulers:**

- **View > Show/Hide > Rulers and Grids > Rulers**  
-OR-
- **[Ctrl] + R**

When you are editing a form in Acrobat, rulers are displayed by default. From the rulers you can create guides wherever you need them.

**To create a guide:**

1. Click a ruler and drag a guide into the Document pane.
2. Release the mouse button when the guide is in the desired position. You can use the visual reference of the opposite ruler to precisely position the guide.

**To reposition a guide:**

1. Move your cursor toward the guide.
2. When your cursor becomes an angled arrow, click and drag the guide to the desired position.

**To remove a guide:**

1. Select the guide and then drag it out of the Document pane.

## Working with Form Fields

After you create the PDF document that's the basis for your form, you're ready to start adding interactive form fields.

### Acrobat Form Field Options

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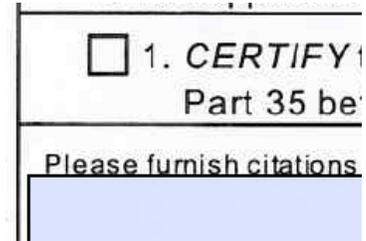
Whether you use the **Prepare Form** command to add fields to a form or add each field manually, you can create these types of form fields in Acrobat:

- **Text Field:** The most frequently used form field, a text field can accept a wide range of user input or can display default data, such as the current date.
- **Check Box:** Add check boxes when you want the user to choose from a set of options. For example, if you create a PDF questionnaire, you can create a series of check boxes for the user to select one or more items. The default check box style is a check but you can also change it to Circle, Cross, Diamond, Square, or Star from the **Options** tab under the **Properties** dialog box.
- **Radio Button:** Radio buttons limit the user's choice to one item per group of radio buttons.
- **Dropdown (Combo Box):** When you create a combo box, or dropdown list, you give the user a choice of options. A combo box is identified by the presence of a drop-down arrow. When the arrow is clicked, a menu drops down with a list of available choices. Optionally, you can also allow users to enter custom text as a list item. A dropdown displays as one line.
- **List Box:** A list box displays a list of available choices for the user. You can enable the users to make multiple selections from a list box (something that isn't possible with a combo box). If the number of items in the list box exceeds the dimensions of the box, Acrobat provides scroll bars. A list box displays as multiple lines deep.
- **Button:** With a button, you can create a text-only button, an icon-only button, or a button with both an icon and text. You can even create an invisible button and place it over an existing graphic on a form you scanned and converted to PDF format, which gives the appearance that the graphic is executing the action instead of the form field.
- **Date:** The Date Picker field displays a calendar to simplify date entry. This field is a shortcut to add a text field with a date format. *The Date Picker is a new field in Acrobat DC; earlier versions of Acrobat and Adobe Reader will only display a text field.*

Other fields can also be added to a form including a digital signature field, image, and a barcode field.

## Adding and Editing Form Fields

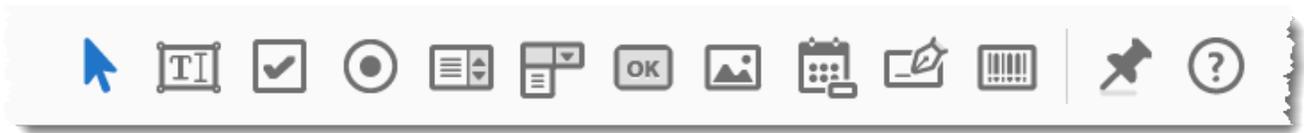
Even with form field detection features, Acrobat will probably have missed some of the form fields you need on the page. For example, the checkbox in a scanned form (shown to the right) needs to be added. Or, you may want to create the form by adding all form fields manually.



### To add form fields to a form:

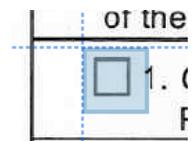
1. Open the PDF form you want to edit.
2. Click **Tools > Prepare Form**. Then pick **Edit** which opens the Form Editor.

The **Prepare Form** toolbar appears above the document.



3. Select the type of field you want to add to the page such as a text box or check box.

The pointer turns into a ghost-like rectangle with a dotted-line crosshair.



4. You can either click once on the PDF page, which places a form field on the page the same size as the tool, or drag out a rectangle which gives you a new form field the size of the rectangle you dragged. Either way, you get a form field on the page with a yellow floating palette immediately adjacent to it.
5. Type a name in the palette's **Field Name** field. It's good practice to have no spaces in the name. The **Field Name** is an internal reference not a label.



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6. Click the **Required Field** check box if the information is required.
7. Optionally, click the **All Properties** option to display the properties dialog box for the field. From here you can change properties such as the appearance and actions related to working with the field. Change properties as needed and then **Close**.
8. Reposition and resize the new field so it matches the form layout.

You can nudge the position of the field with your arrow keys and nudge the size with **[Ctrl] +** arrow keys.

9. Repeat these steps for each field you need to add to the page.
10. Click the **Keep tool selected** pushpin button if you want to add a number of the same type of form field.
11. When you are done with the form, click the **Preview** button to test your form.



To edit a form field, double-click the field, select options in the **Properties** box, and click **Close**.

Or, right-click on a form field and pick **Properties** from the shortcut menu.

## Editing & Modifying Form Fields

### Deleting a Form Field

To delete a form field:

1. Right-click on the form field and then pick **Delete** from the shortcut menu.

### Align, Reposition, and Resize Form Fields

If you use the **Layout Grid** (press **[Ctrl] + U** to turn on/off) to align and size the fields in your form, you generally end up with a neatly laid-out form. However, you may still need to make some minor adjustments to the location or size of a field. You can resize individual fields or select multiple fields and then size and align them to each other.

After you click on the form field to select it, eight handles appear about the field border. You can then modify the field by doing any of the following:

- Drag the field to reposition the form field.  
-OR-
- Click and drag any selection handle to resize the field.  
-OR-
- Go to the properties of a field to size and align it under the **Position** tab.

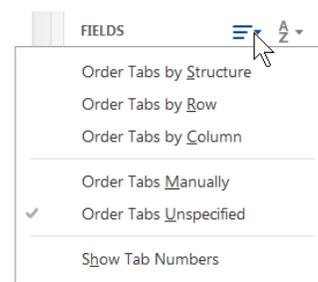
You can also modify the size and alignment of several fields. Select the first form field and then press **[Shift]** and click the fields you want to add to the selection. After selecting two or more fields, you can do any of the following:

- Right-click on one of the fields and pick **Align, Distribute or Center**. You can change the alignment, center fields to the current document, or equally distribute the selected fields. The option you pick applies to all selected fields.

These tools are also found at the top of the **Prepare Form** pane.

### Changing Tab Order

You can also change the tab order if the sequence of how a user moves through the form needs to be changed. The **Tab Order** option is found under the **Fields** list. You can re-order how a user moves or tabs through the form by using the form layout or by manually modifying the order.



### Reviewing a Form



To test a form, click **Preview** to view and work with form fields. Click **Edit** to return to edit mode.

## Filling Out a PDF Form

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When users fill out a form they click inside a field with the Hand tool. When users click inside the form field, the cursor becomes an I-beam, indicating that data can be entered from the users' keyboard.

### To navigate to another field:

- Click inside another field  
-OR-
- Press **[Tab]** to advance to the next field.

## Printing a Form

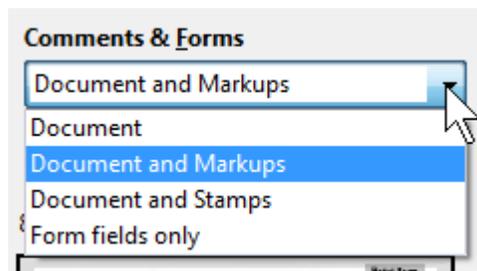
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A form can be printed just like any other PDF file.

### To print a form:

- Pick **File > Print**  
-OR-
- Press **[Ctrl]+P**  
-OR-
- Click the **Print file** toolbar button

To only print the data in the form fields and not the form content, pick one of the first two print options and then choose **Form fields only** from the **Comments & Forms** drop-down.

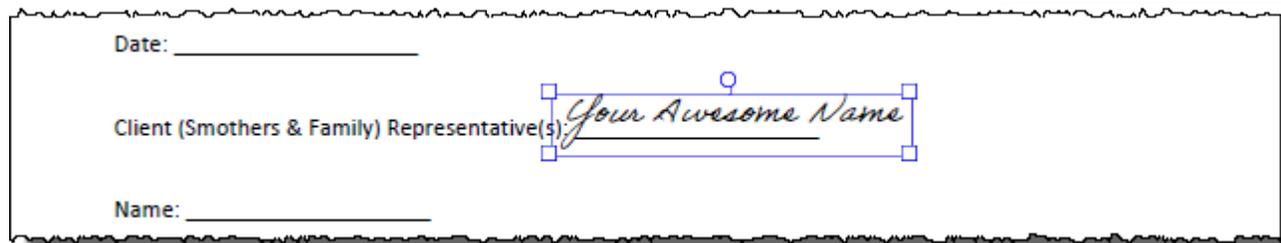
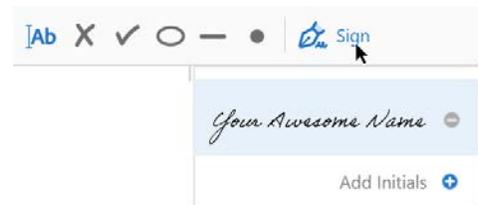


## Adding an Electronic Signature

Rather than printing a PDF, signing it by hand, and then rescanning to create another PDF, Acrobat offers a variety of options for adding a digital signature.

**To add a signature:**

1. Choose **Tools > Fill & Sign** pane which includes several different tools for adding notations to a PDF document.
2. Pick **Add Signature**.

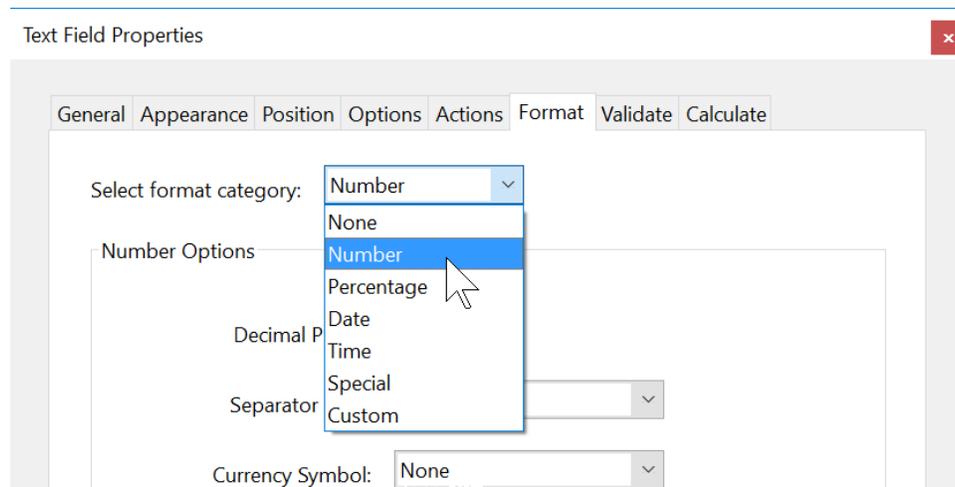


## Calculating Form Fields

When you create form fields with numeric data, Acrobat can calculate the value of two or more fields using common arithmetic functions or even complex calculations which require JavaScript. For our purposes, we'll stick with simple calculations.

### To calculate two or more form fields:

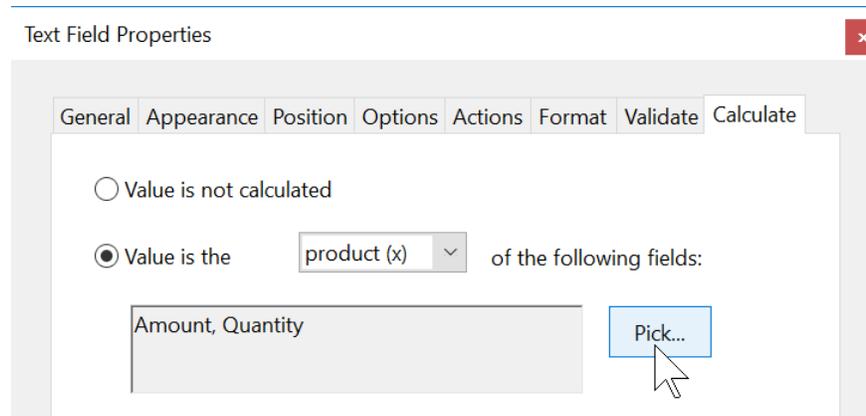
1. All of the fields needed for the calculated result should be in the form. These fields will be text form fields with a number or other format that can be calculated. Change the field **Format** under the field properties.



2. Create the form field that will display the result of the calculation.
3. Open **Properties** for the field (double-click on the field or right-click on field) and click the **Format** tab.
4. Choose **Number** from the format categories. Select other options that pertain to the calculation, for example, add a Currency symbol for dollars.
5. Click the **Calculate** tab. Pick the second option to choose a mathematical operation such as **Sum (+)** or **Product (x)**.

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6. Click the **Pick** button to display the **Field Selection** dialog box, which lists all the fields present in the document. Add the fields you need such as **Amount** and **Quantity** as shown below. Click **OK** to exit the **Select a Field** dialog box.



7. Choose **Close** to exit the form field's Properties dialog box.
8. Pick **Preview** to test the form.

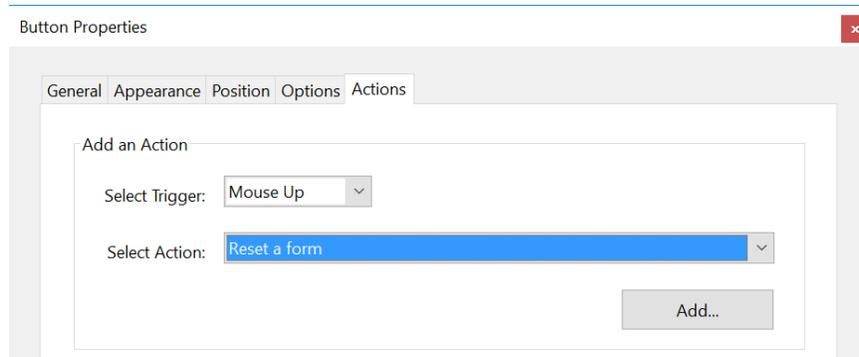
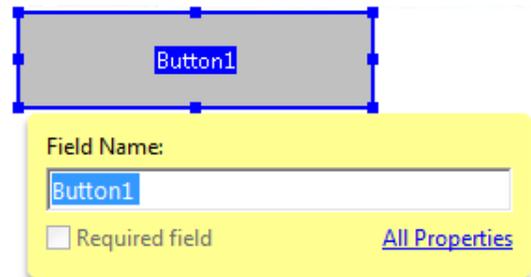
## Creating Form Buttons

### Reset Form Button

If you create a form with multiple fields, you may want to consider creating a reset button to give the user the option of starting over. When you create a reset button, you can specify which form fields are cleared when the button is used.

#### To create a Reset button:

1. Using the form field tools, add a button field to your form.
2. Enter a name for the field such as Reset. This is just the field name and not the name displayed on the form.
3. Click **All Properties** and modify the button appearance and options to suit your form.
4. To edit the label displayed for the user of the form, click the **Options** tab to enter a Label name to display on the form.
5. Click the **Actions** tab and choose **Mouse Up** as the trigger. This action will define what happens after someone clicks on the button.
6. Pick **Reset a Form** from the **Select Action** drop-down arrow.



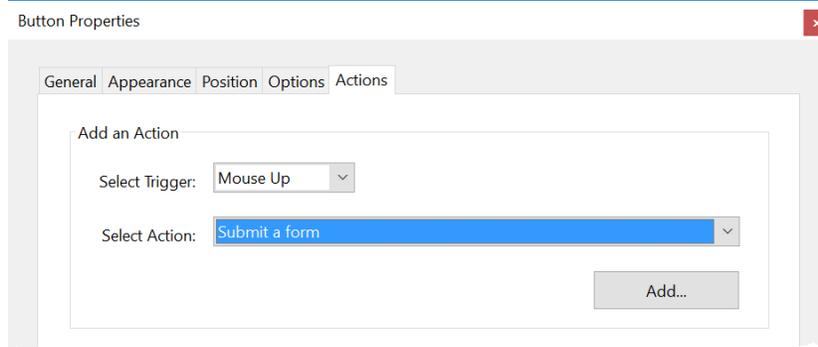
7. Click the **Add** button to open the **Reset a Form** dialog box. Select all of the form fields you want to reset. Choose **OK** and then click **Close** to assign the action to the button.
8. Fill out a few of the form fields and then try your reset button.

## Submit Form Button

A submit form button gives the user an easy way to send the form to someone via email.

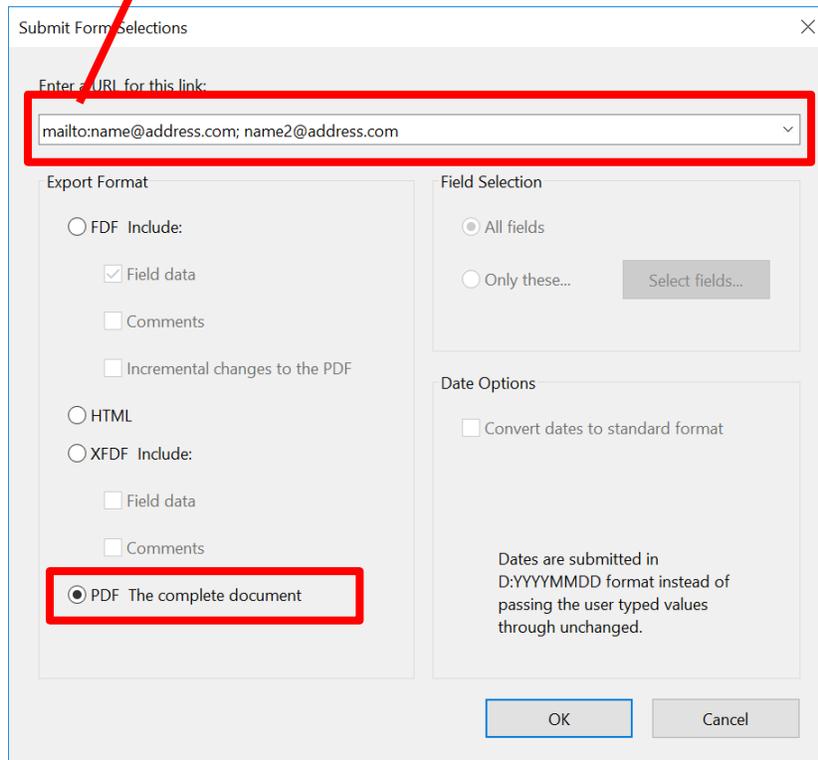
**To add a Submit Form button:**

1. Following the steps covered previously, create a button with these actions:



2. The properties of the button are shown below. Use a semicolon (;) to separate multiple email addresses.

mailto:name@address.com; name2@address.com



Put these tips and techniques to practice and become more productive with Acrobat!



# Tips, Timesavers & Takeaways

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# Meet Dawn

## Dawn Bjork, MCT – The Software Pro®

*Software Productivity is Only a Click Away™*

Dawn Bjork, MCT, is The Software Pro® with 25+ years' experience as a *Software Navigator*.



A professional speaker, trainer, consultant, author, and business owner, Dawn simplifies complex processes with an informative and entertaining approach and delivers content that is immediately useful. Dawn has helped more than 100,000 individuals from Fortune 500 companies, government, education, and other organizations to learn smart, easy, and productive ways to use software and technology more effectively.

Microsoft has awarded Dawn with the certifications of Microsoft Certified Trainer (MCT), Microsoft Office Specialist Master (MOSM), and individual certifications in Microsoft Windows, Excel, Word, PowerPoint, Outlook, Access, OneNote, and Visio. In addition, The Software Pro is certified as a

Women's Business Enterprise (WBE). As a trainer and consultant, Dawn has worked with Adobe Acrobat for more than 10 years.

Dawn is the Immediate Past President of the National Speakers Association-Colorado, the largest chapter in the country. When she's not immersed in the world of software productivity, Dawn enjoys the Colorado mountains, hiking, biking, golf, yoga, playing poker, and spending time with her family.



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