

Acrobat PDF Forms

Table of Contents

| | |
|--|----|
| 1) Form Controls/Fields | 2 |
| 2) Create a Form from a Blank Document within Acrobat..... | 4 |
| 3) Distribute Form and Track | 7 |
| 4) Review Tracker..... | 9 |
| 5) Create a PDF Form from Word | 10 |
| 6) Word Formatting Tips | 16 |
| 7) Create a PDF Form from Excel | 17 |
| 8) Security Options and Password Protection..... | 17 |

Contact:

Frank Asciutto

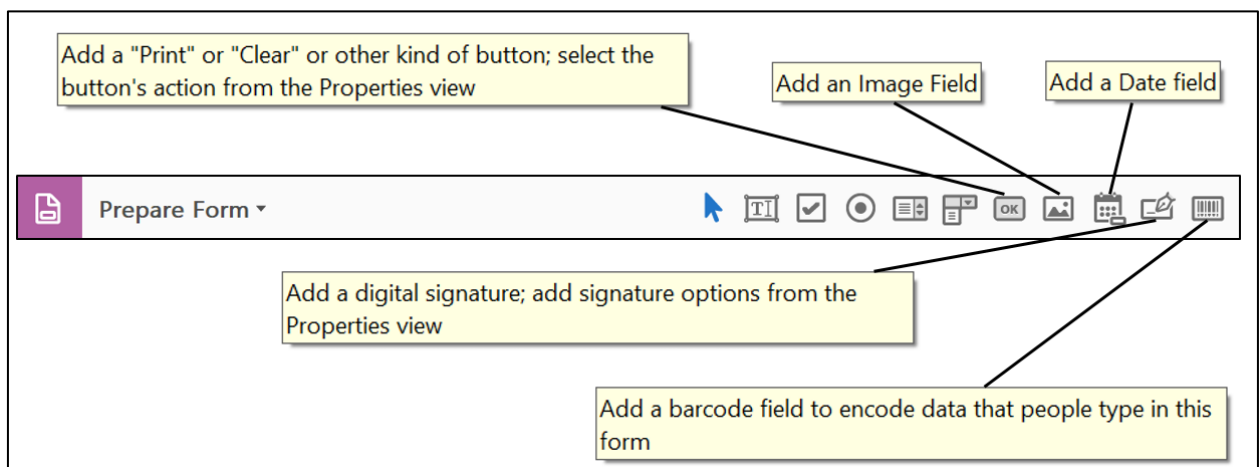
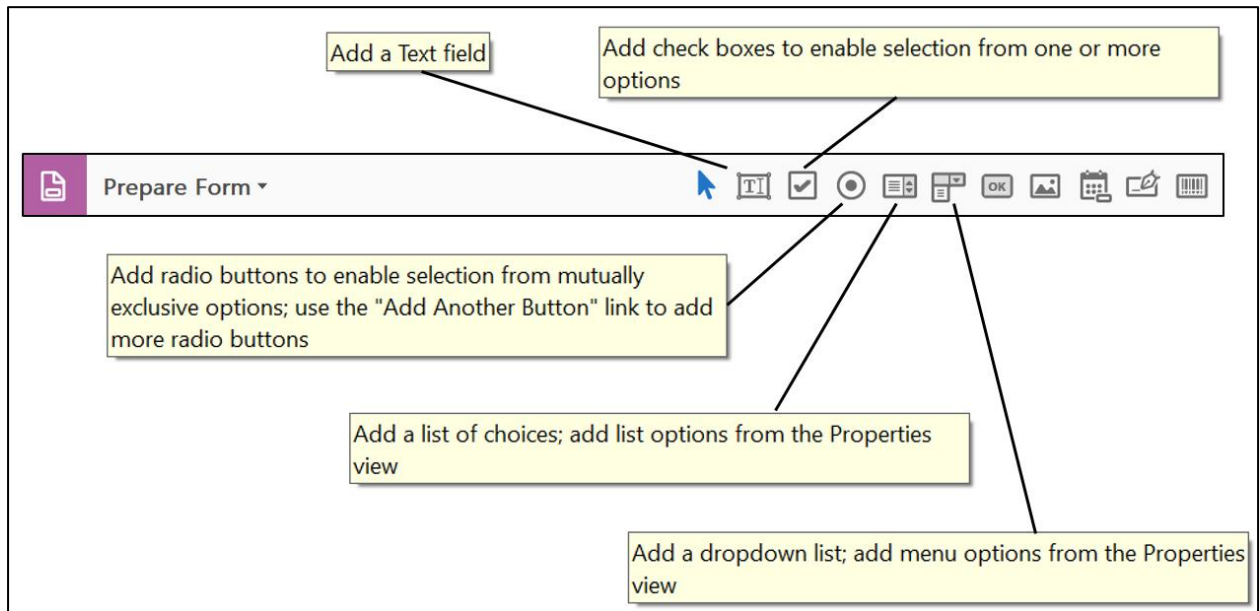
Digital Technology Instructor

Continuing and Professional Education

asciuttof@wpunj.edu

973-720-3829

1) Form Controls/Fields



The 4 Most Common Form Fields

1) Text

Text fields are used where the field entry can vary widely. Examples include names, addresses and descriptions or explanations. Ensure the field is large enough to contain the desired entry.

2) Check Boxes

Check Boxes are used where there are a set number of selections and more than one may be selected at a time. If “select all that apply” is applicable to that section, check boxes should be used.

3) Radio Buttons

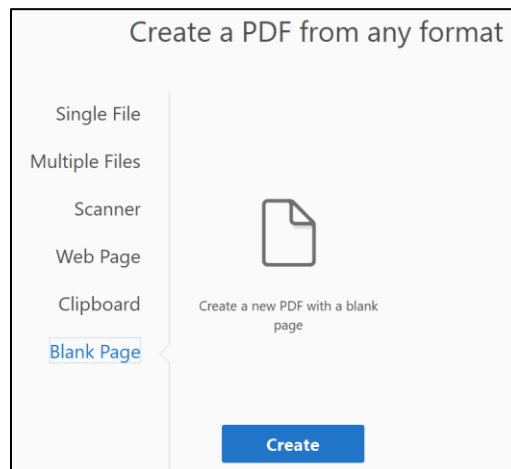
Radio Buttons are used when there is a set number of selections, but only one may be selected. If “select only one” or yes/no is applicable to that section, radio buttons should be used. If there are more than a handful of selections, use a dropdown list to save space on the form.

4) Dropdown Lists

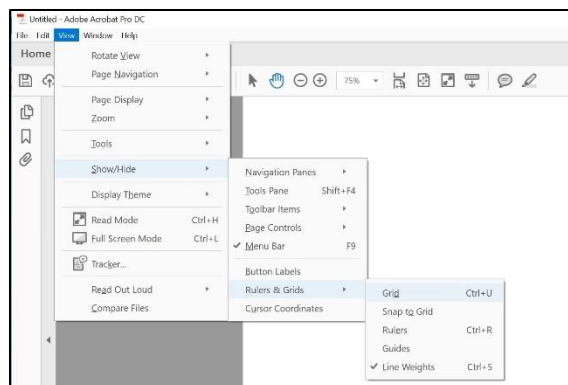
Dropdown Lists are used when there are a set number of selections, but only one may be selected. Ensure the field is wide enough to show the text of the widest selection.

2) Create a Form from a Blank Document within Acrobat

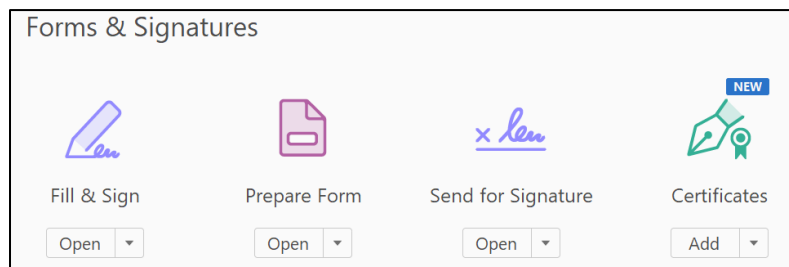
1. Start with a Blank Acrobat document



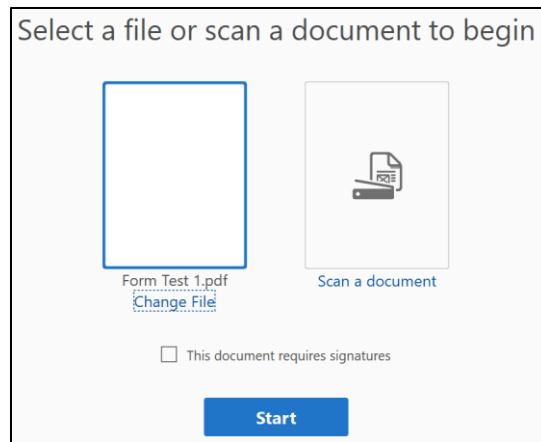
2. Save it (example: Form Test 1.pdf)
3. View > Show/Hide > Rulers and Grids > Grids



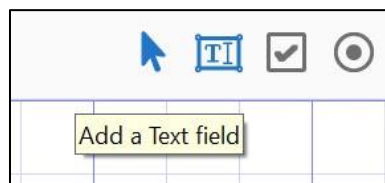
4. Tools > Prepare Form > Start



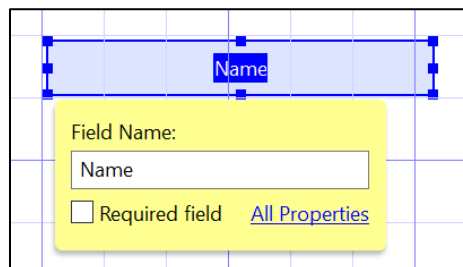
Acrobat PDF Forms



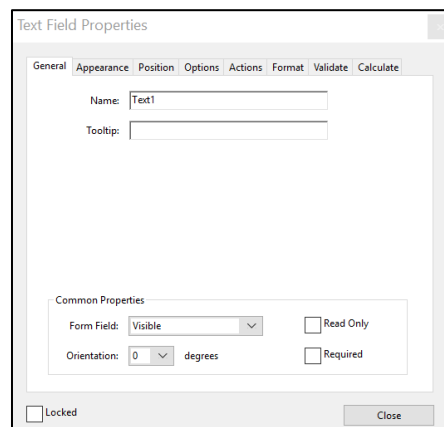
5. Add 3 Form Text Box Fields (as an example)



6. Give the Fields a Name (Name, Address, City)



7. Explore All Properties



Acrobat PDF Forms

8. Review Size, Align, and Distribute

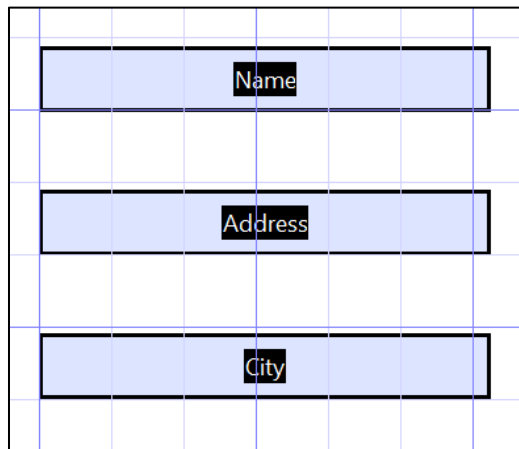


Diagram showing three horizontal text boxes labeled Name, Address, and City, each with a black border and a light blue fill, arranged vertically on a grid.

9. Add 3 Form Text Field Labels: Tools > Edit PDF (Click and Drag to create the text label)



A button with a blue 'T' icon and the text 'Add Text'.

10. Position the Text Boxes using the Edit command

11. Review Font options

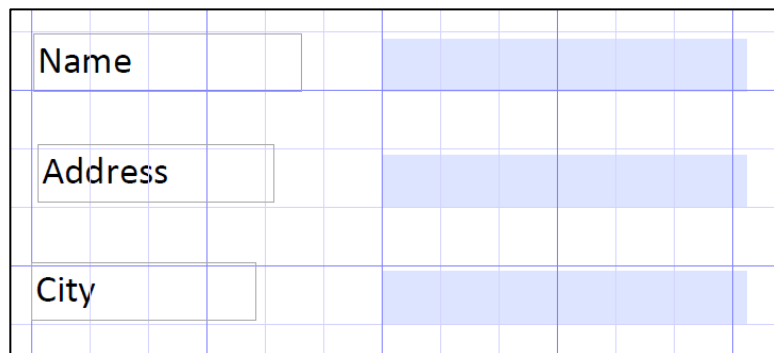
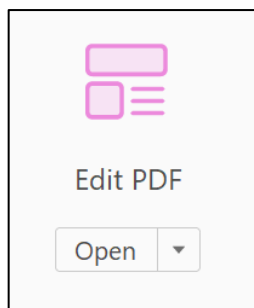
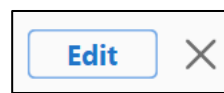
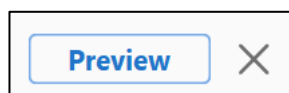


Diagram showing three horizontal text boxes labeled Name, Address, and City, each with a black border and a light blue fill, arranged vertically on a grid.

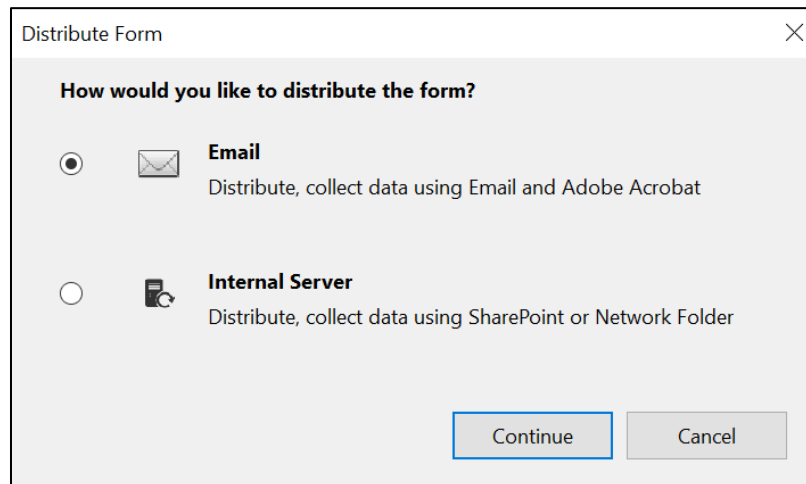
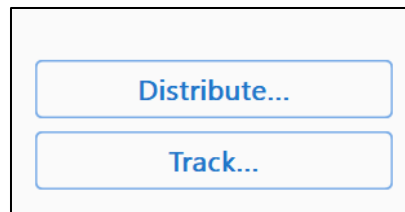
12. Return to Prepare Form

13. Make any adjustments to the layout

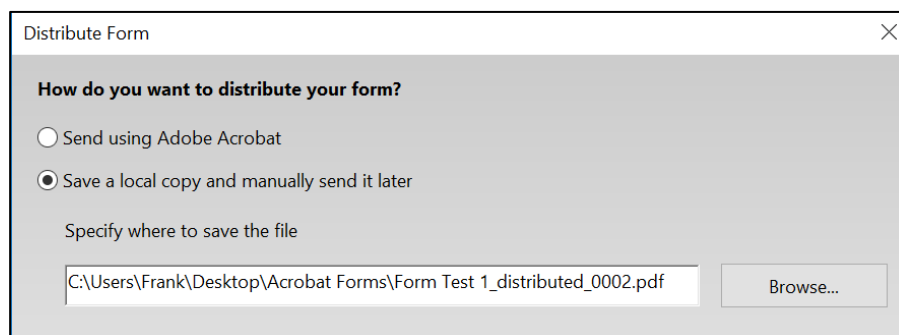
14. Review Preview and Edit



3) Distribute Form and Track



1. Save it and Send it
2. **Options 1:** Send it later using Outlook

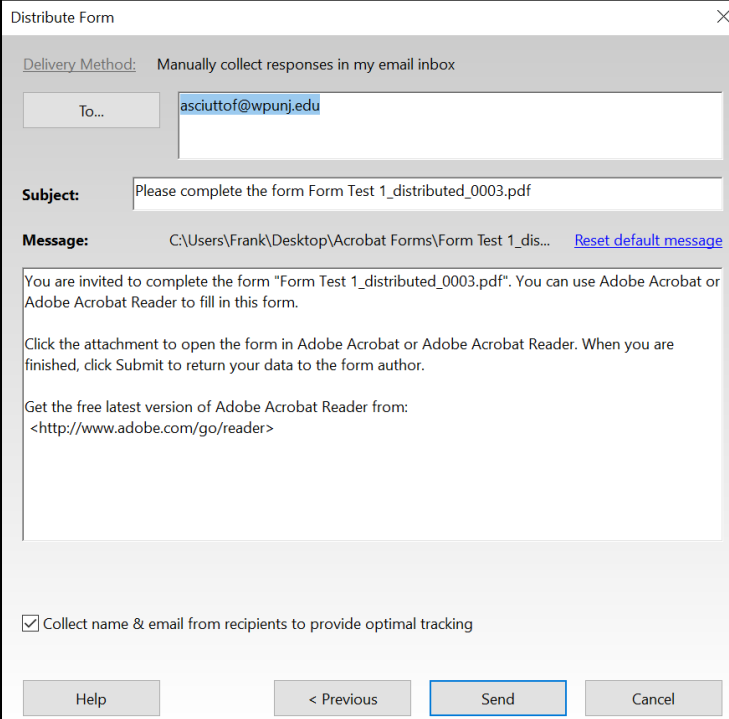


3. Enable Tracking



Acrobat PDF Forms

5. **Options 2:** Send it now using Acrobat
6. Send it to yourself



The 'Distribute Form' dialog box is shown. It has a title bar with a close button. The 'Delivery Method' is set to 'Manually collect responses in my email inbox'. The 'To...' field contains the email address 'asciuttof@wpunj.edu'. The 'Subject' field contains the text 'Please complete the form Form Test 1_distributed_0003.pdf'. The 'Message' field contains the following text: 'You are invited to complete the form "Form Test 1_distributed_0003.pdf". You can use Adobe Acrobat or Adobe Acrobat Reader to fill in this form. Click the attachment to open the form in Adobe Acrobat or Adobe Acrobat Reader. When you are finished, click Submit to return your data to the form author. Get the free latest version of Adobe Acrobat Reader from: <http://www.adobe.com/go/reader>'. There is a checkbox labeled 'Collect name & email from recipients to provide optimal tracking' which is checked. At the bottom, there are four buttons: 'Help', '< Previous', 'Send', and 'Cancel'.

Distribute Form

Delivery Method: Manually collect responses in my email inbox

To... asciuttof@wpunj.edu

Subject: Please complete the form Form Test 1_distributed_0003.pdf

Message: C:\Users\Frank\Desktop\Acrobat Forms\Form Test 1_dis... [Reset default message](#)

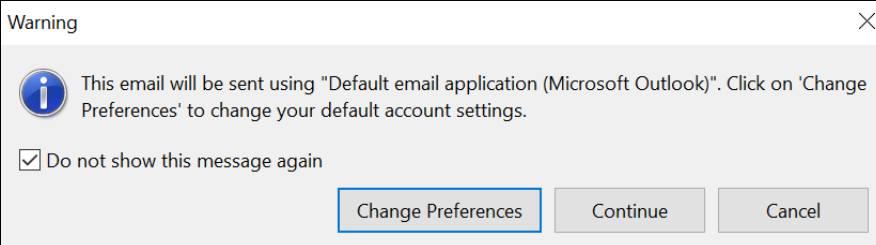
You are invited to complete the form "Form Test 1_distributed_0003.pdf". You can use Adobe Acrobat or Adobe Acrobat Reader to fill in this form.

Click the attachment to open the form in Adobe Acrobat or Adobe Acrobat Reader. When you are finished, click Submit to return your data to the form author.

Get the free latest version of Adobe Acrobat Reader from:
<http://www.adobe.com/go/reader>


☒ Collect name & email from recipients to provide optimal tracking

Help < Previous Send Cancel



The 'Warning' dialog box is shown. It has a title bar with a close button. It contains an information icon and the text: 'This email will be sent using "Default email application (Microsoft Outlook)". Click on 'Change Preferences' to change your default account settings.' There is a checkbox labeled 'Do not show this message again' which is checked. At the bottom, there are three buttons: 'Change Preferences', 'Continue', and 'Cancel'.

Warning

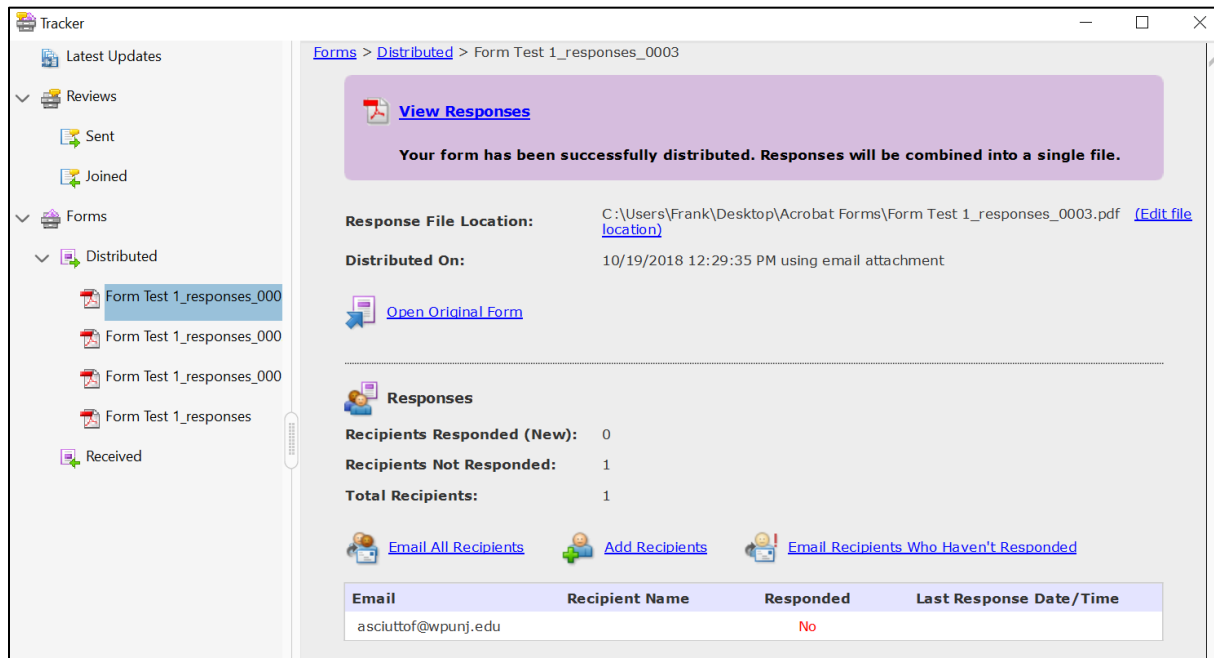
 This email will be sent using "Default email application (Microsoft Outlook)". Click on 'Change Preferences' to change your default account settings.

☒ Do not show this message again

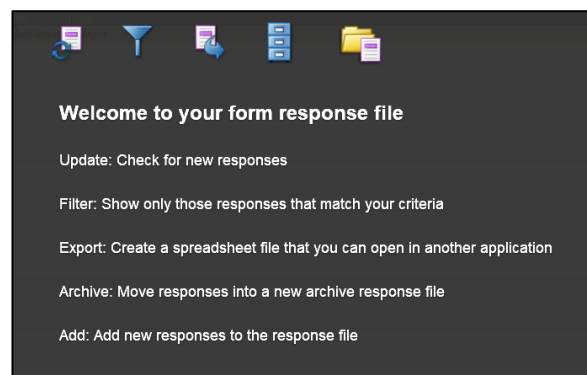
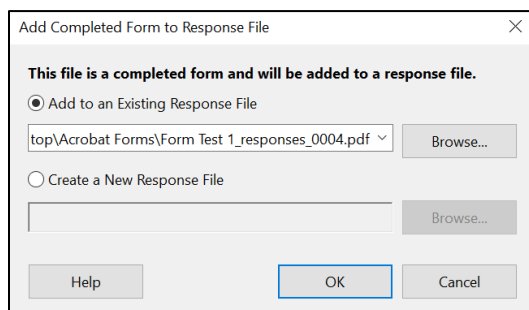
Change Preferences Continue Cancel

7. Send

4) Review Tracker



1. Open the Form in your email
2. Fill in the fields and Return it with the Send button
3. Handling Responses
4. Add the completed Form to the Response File

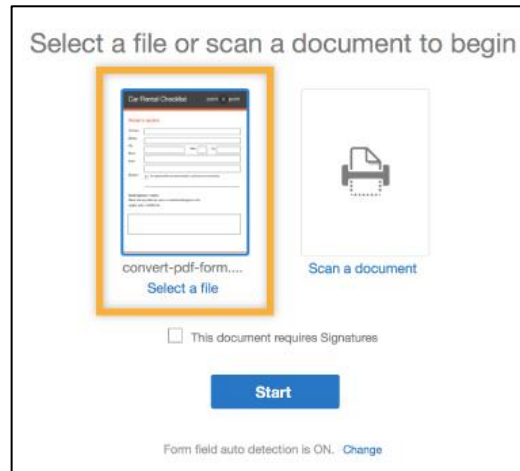
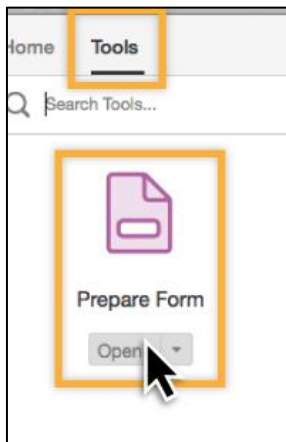


5. Review the Response File

| Received Date | Name | Address | City |
|------------------------|-------|-----------------|-------|
| 10/19/2018 12:39:26 PM | Frank | 100 Main Street | Wayne |

5) Create a PDF Form from Word

1. Select a file to convert (**Create Form from Word - Car Rental.docx**)
2. Choose **Start** to prepare the form



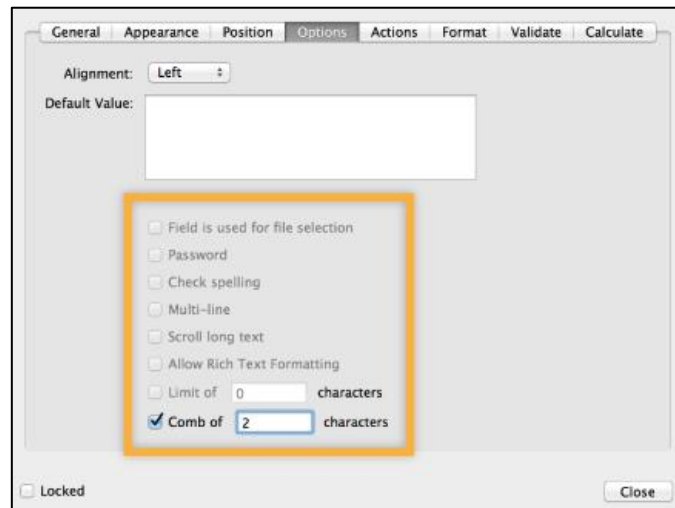
The screenshot shows the Adobe Acrobat 'Prepare Form' workspace. The main area displays a 'Car Rental Checklist' form with a header 'point 2 point'. Below the header is a section titled 'Renter's section' in orange. This section contains several form fields: 'Full name', 'Address', 'City', 'State', 'Zip', 'Phone', and 'Email'. A checkbox at the bottom is labeled 'I've inspected the car exterior/interior, and noted concerns below.' On the right side, there is a 'FIELDS' panel with a list of fields: 'Full name', 'Address', 'City', 'State', 'Zip', and 'Phone'. The 'FIELDS' panel is highlighted with an orange rectangular box. Above the 'FIELDS' panel are various alignment and distribution tools. At the top right, there is a 'Preview' button.

4. Edit Text field properties

Some text fields, such as the **State** field, require letters to be spaced evenly in predefined boxes. This is called a field comb and, in this case, needs to be limited to 2 characters.

- **Right-click** the Text field and choose **Properties...**
- Click **Options** in the top of the Properties window and *deselect* all of the options.
- Select **Comb of...** and type **2**.

This limits the text field to two characters and ensures that the field will be filled in

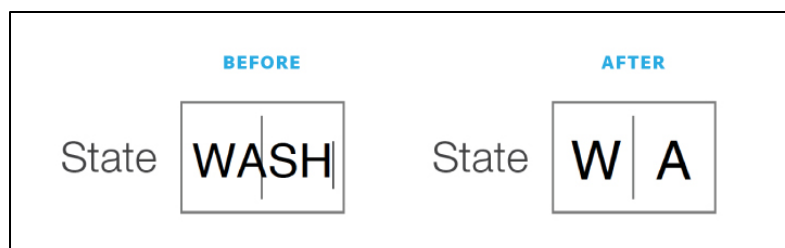


properly.

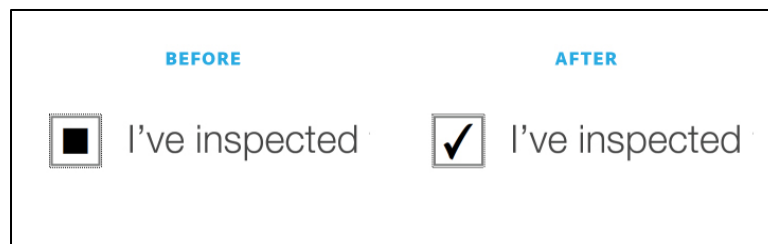
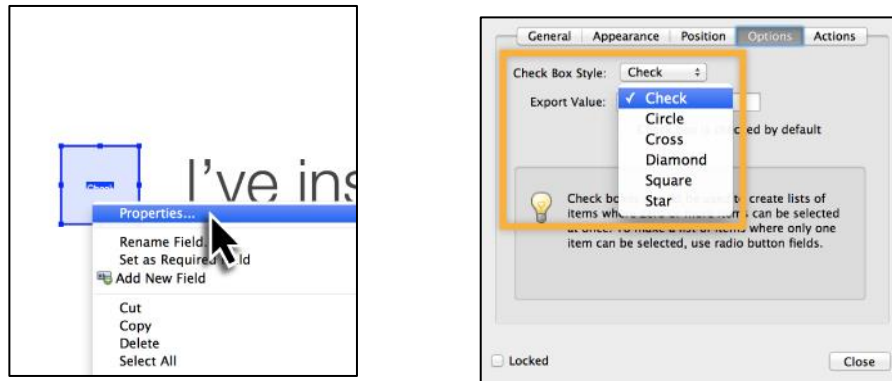
5. Edit Check Box properties

The default Check Box Style is a black square. To change the style to a Check Mark (or other symbol), **right-click** on the Check Box and choose **Properties...**

Click **Options** in the Properties window, and change the **Check Box Style** to *Check*.

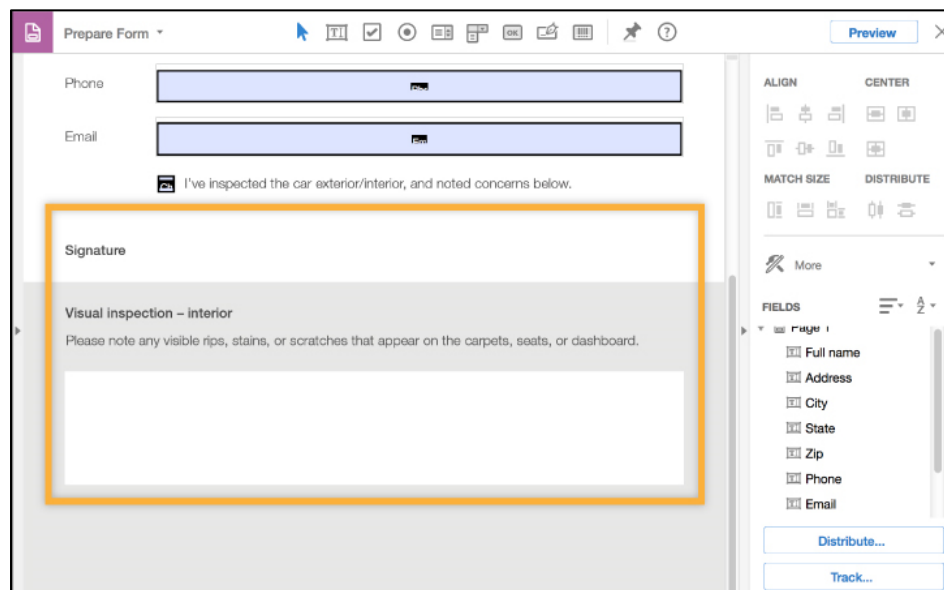


Acrobat PDF Forms



6. Create custom fields

Acrobat cannot automatically detect all fields. In this example, the **Signature** section does not include a visual representation of its function (such as a line to sign on). Additionally, the **Visual Inspection** section doesn't include a border around the text field. Let's create some custom fields to finish the form.

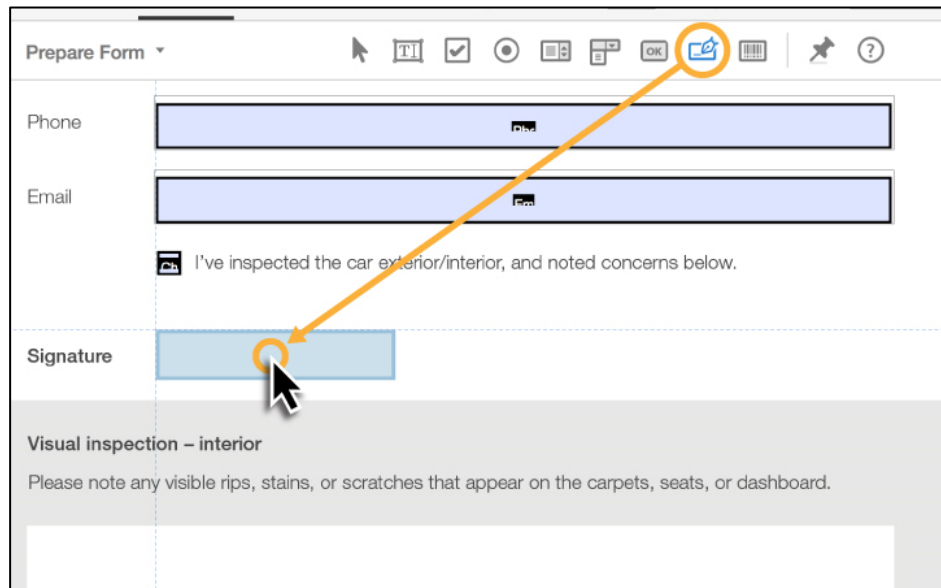


Add a signature field

Acrobat PDF Forms

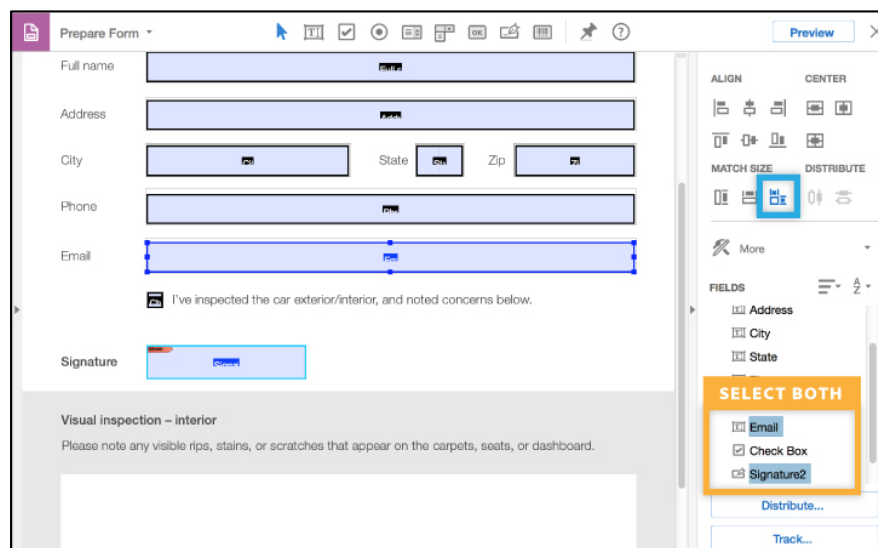
In the **Tool menu**, click once on the **Digital Signature** icon. Move your mouse to the correct position on the page using the alignment guides. When you are satisfied, **click once** to add the field to the page.

Tip: Instead of clicking once to place the signature field, you can *click and drag* to resize the field before placing.

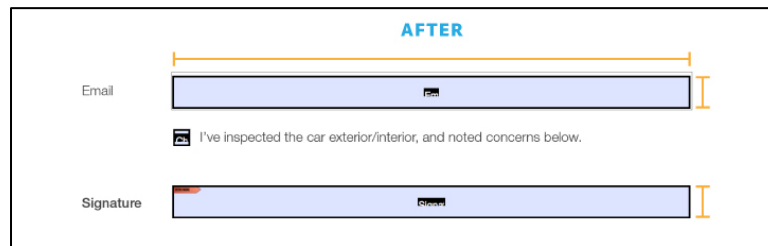


In this case, the signature fields needs to be resized to match the others on the page. Start by **selecting** the Signature field on the page, or in the Fields menu to the right.

Next, use **Ctrl + Click** to select the Email field as well. When both are selected, choose the **Match Size** option that includes *Width* and *Height*. The Signature field will automatically resize to match the size of the Email field.

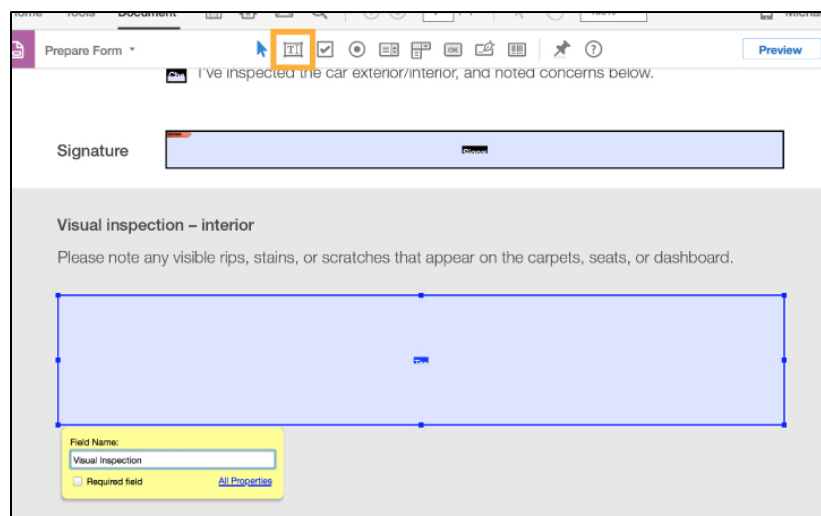


Note: The order you select items is important to how fields resize. When multiple fields are selected, they will match the size of the last item you clicked.



7. Add an extended Text field

Click once on the **Text field** icon in the Tools menu and **click and drag** the field to fill the entire white area at the bottom of the document. When you add the field, you can choose to give it a name. Clicking "All Properties" enables you to edit more properties for the field.



8. Create a button to clear the form

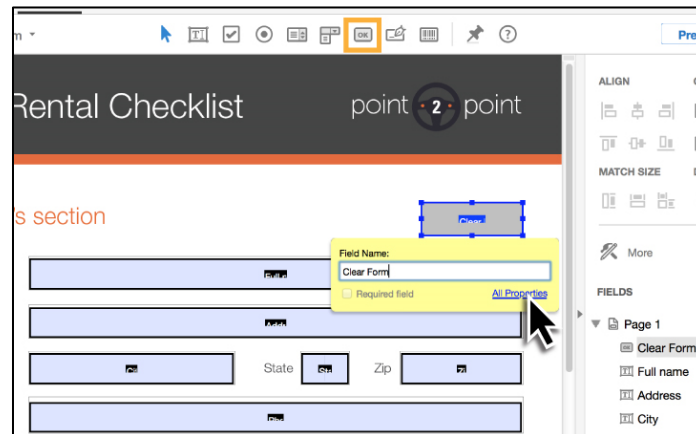
Adding a button to reset a form can be an efficient way to clear data from the form. To add this button, select the **Button** icon from the Tool menu. Move your mouse to the correct position on the page and click once to add the button. Give the button a name.

Next, choose **All Properties** (You can also right-click the button and choose Properties...).

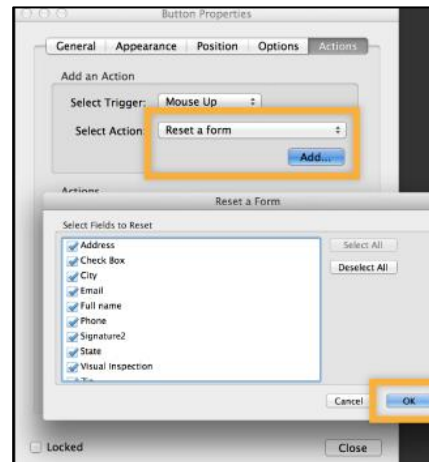
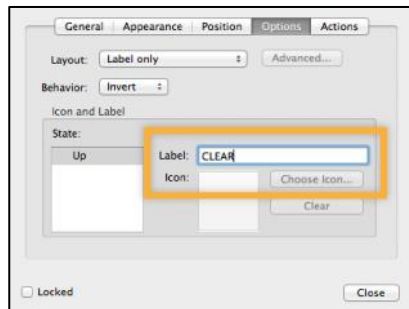
- Choose **Options** in the Button Properties window. Add a Label to the button that reads **CLEAR**.
- Choose **Actions** in the Button Properties window.
- Select the **Reset a form** action.

Acrobat PDF Forms

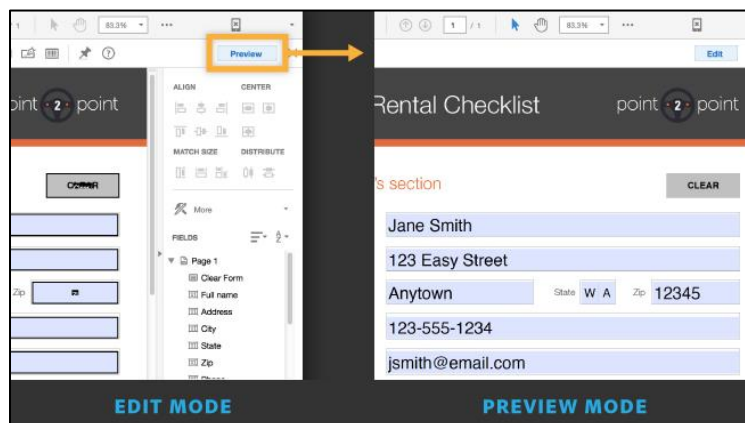
- Then click **Add...** and select the fields that you'd like to reset with the button. Click **OK**.



When you use the Clear button, all data will be cleared from the form fields and reset to empty values.



9. Preview and Test



6) Word Formatting Tips

1. Create a Table with Borders

- Acrobat will convert blank table cells to Form Text Fields
- Borders must be visible, they can be removed in Acrobat Edit Text
- Acrobat will use the text in the adjacent column for the Field Property Name
- Convert both examples and compare the results:
 - **Word Form - Table.docx**
 - **Word Form - No Table.docx**

| | |
|---------|--|
| Name | |
| Address | |
| City | |

2. Use Text Boxes

- Acrobat will convert blank Text Boxes Check Boxes to Form Fields
- Example: **Word Form - Text Boxes.docx**

| | |
|-----------|--------------------------|
| Name | <input type="text"/> |
| Address | <input type="text"/> |
| City | <input type="text"/> |
| Check Box | <input type="checkbox"/> |

7) Create a PDF Form from Excel

1. Use Cell Borders for your Form Fields

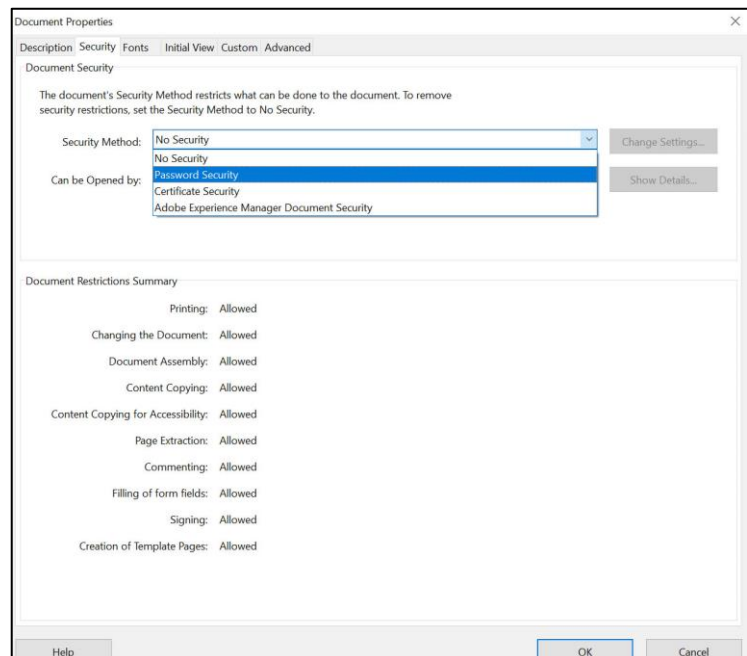
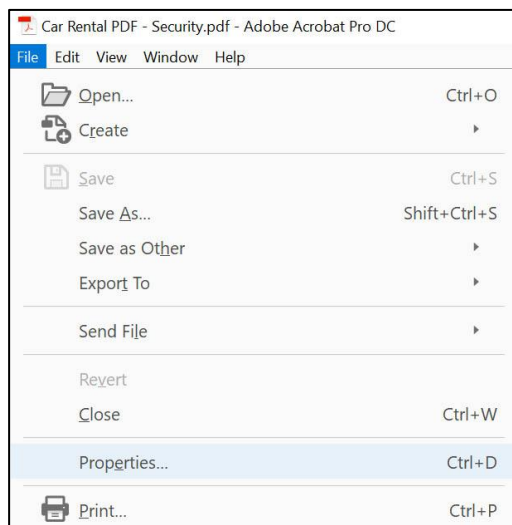
- Acrobat will convert blank Excel cells to Form Text Fields
- Borders must be visible, they can be removed in Acrobat Edit Text

▫ **Excel Form - Borders.xlsx**

| | A | B | C |
|---|---------|---|---|
| 1 | | | |
| 2 | Name | | |
| 3 | | | |
| 4 | Address | | |
| 5 | | | |
| 6 | City | | |
| 7 | | | |

8) Security Options and Password Protection

1. Open **Car Rental PDF - Security.pdf**
2. Choose **File > Properties**
3. Select the **Security** Tab



Acrobat PDF Forms

4. Choose Password Security
5. Select Changes Allowed: Filling In form fields and signing existing signature fields
6. Provide a Password

Password Security - Settings

Document Open

☐ Require a password to open the document

Document Open Password: Not Rated

i No password will be required to open this document.

Permissions

☒ Restrict editing and printing of the document. A password will be required in order to change these permission settings.

Printing Allowed:

Changes Allowed:

☐ Enable copying of text, images, and sounds

☒ Enable text access for screen readers

☐ Enable content access for screen readers

Change Permissions Password: Not Rated

Options

Compatibility: Encryption Level: 128-bit AES

☒ Encrypt all document contents

☐ Encrypt all document contents except metadata (Acrobat 6 and later compatible)

☐ Encrypt only file attachments (Acrobat 7 and later compatible)

i All contents of the document will be encrypted and search engines will not be able to access the document's metadata.