PDF Web Form

In this project, you'll create a PDF form that can be used to collect user data online.

In this exercise, you'll learn how to:

- Design a layout for a functional form.
- Add form fields and set properties.
- Publish a PDF form.

PDF Web Form

To introduce you to the world of PDF forms, we're going to create a simple form to allow users to sign up to a newsletter. Along the way, we'll show you some of the valuable tools available in PagePlus.

However, before we dive in and start placing form objects, there are a couple of things to do first that will save us time in the long run. Use a blank piece of paper to complete these initial steps.

Creating the form design

Let's think about the information we need to collect from our potential newsletter recipients. At the very least, we'll need to know who is subscribing and their email address. However, we could also get some information that might be useful for marketing campaigns at a later date.

Let's assume that we want to capture the following data:

- Name (first and last)
- Email address
- Age
- Gender
- Whether or not they want to be informed of other offers

> 💡 **Design guidelines**
>
> - Keep your form simple and uncluttered.
> - Group related form fields together.
> - Give your form fields clear, meaningful labels and position them consistently relative to the object.
> - Provide clear and simple instructions (use ToolTips where necessary) to help users complete the form as easily as possible.
> - If users must complete certain information on the form, be sure to indicate that these fields are mandatory. For example, with an asterisk or colour-coding.

The next step is to map out the form design with paper and pencil. Although it's tempting to skip this part, try not to. If you sketch your form layout on paper first, you'll end up with a better overall design and save time as you'll only place the objects that you really want.

To continue an earlier theme, we're going to use a design to match the poster that we created in the *Artistic Text* tutorial. You'll find a project file **form.ppp** in the **...\Workspace\Form** folder.

In a standard installation, this is found in:

C:\Program Files\Serif\PagePlus\X4\Tutorials

We drafted out the form design illustrated here.

All we need to do now is recreate it in PagePlus. Let's get started...

To open the workspace document

1   On the **File** menu, click **Open...**

2   In the dialog, browse to the **Workspace** folder, select **anaconda.ppp** and click **Open**.

   The document opens in the workspace.

3   Next, on the **File** menu, click **Save As...**

4   Name the document **PDF form.ppp** and click **Save**.

Layout aids

The document has been set up using a 5 x 5 layout grid. If you can't see the grid, on the **View** menu, ensure that **Trimmed Mode** is unselected and that **Guide Lines** are selected. This will help you to position the elements.

Now we're ready to start creating our form.

Creating the form text and labels

The form we've designed has two distinct object types: text objects (information and labels—blue) and form objects (for user data—red). We'll add the text objects first.

We'll assume that you're already familiar with using text objects so we'll summarize this section. If you need more help with any of the steps, see the *Artistic Text* and *Frame Text* tutorials, refer to the **How To** tab or see online Help.

To add the title and information text

1   On the Tools toolbar, click the **Standard Text Frame** tool.

2   Click and drag on the page to place a text frame approximately 1cm high and 14.7 cm (4 columns) wide.

3   On the Text context toolbar, select the Title Col style and type in the title, 'NEW PRODUCTS FROM ANACONDA'.

4   Once again, click the **Standard Text Frame** tool.

5   Click and drag on the page to place a text frame below the title frame.

The text frame should be approximately 3.5 cm high and should span all 5 columns of the layout grid.
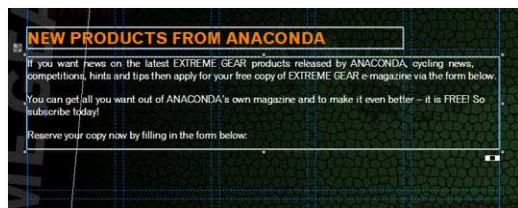
6   On the Text context toolbar, select the **Body Text Normal** style and type your introductory text. Alternatively, press **F5** to add placeholder text.

Next we'll place our form labels.

7   Click the **Standard Text Frame** tool. Starting just below the previous frame, click and drag in the second column of the layout grid to place a text frame 1 column wide and approximately 0.7 cm high.

8   On the Text context toolbar, select the **Body Text Normal** style and click **Align Right**.

💡 **Dynamic Guides**

To easily line up multiple objects, why not turn on **Dynamic Guides**?

- Click the arrow on the ⊞ ▼ **Snapping** button. From the flyout menu, select **Dynamic Guides**.

For more information, see online Help.

From our form design, we know that we need 6 form items. Before we type our first label name, let's save ourselves some effort by using the **Replicate** dialog to make copies our newly created text box.

9 With the text box still selected, on the **Edit** menu, click **Replicate...**

10 In the dialog:

- Select **Replicate Method** to **Create grid**.

- Set the **Replicate Count** to **Grid size**, **1** x **6**.

- Set the **Spacing** to **Gap** and change the **Horizontal** spacing to **0.0** cm and the **Vertical** spacing to **0.3** cm.

- Click **OK**.

The six text frames appear neatly aligned on the page.

11 Click inside the first text box and type the label, 'First Name'.
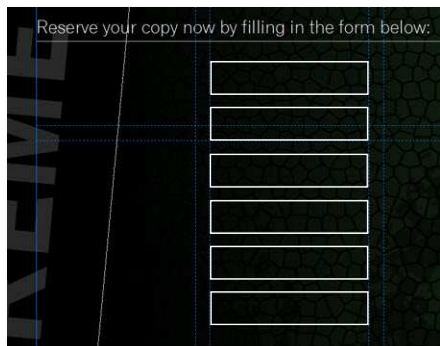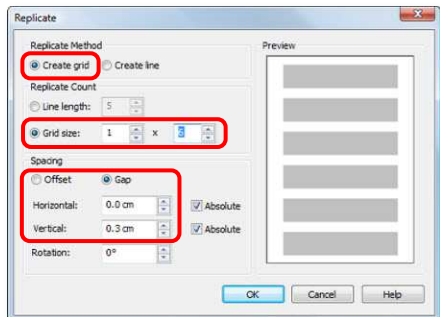
12 In the subsequent text boxes, add the labels for:

- *Last Name
- *E-mail
- *Age
- *Gender
- Check this box to be informed of our special offers.

13 Resize the final text frame to fit the text by dragging the lower left corner handle of the frame to the left of the page.

14 Finally, add a text frame to hold the information about unsubscribing.

Your form should resemble the one illustrated. Why not save your progress at this point?

Now that we've completed our labels, it's time to add the form objects.

Creating the form objects

We'll use the Form toolbar for this exercise, but you can also click **Insert > Form Field**. The Form toolbar is a floating toolbar, which you can drag to any position in the PagePlus workspace.

To view the Form toolbar

- On the **View** menu, click Toolbars and then click **Form**.

The buttons on the toolbar represent the form field types available. For our first three fields we want users to type in their names and email address. For each of these we'll use a **text field**.

To create a text field

1 On the Form toolbar, click the ⟁ **Text Field** button.

2 Move the cursor next to the 'First Name' label and click and drag to insert the field. Make sure that the field spans two columns of the layout grid.
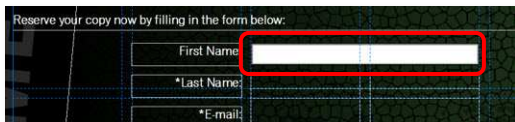
📌 **Text field properties**

Each text field can have its properties customized. To do this, right-click the field and then click **Form Field Properties**.

Within the dialog, you can adjust settings such as:

- Give a unique name to the field.
- Add a ToolTip to give the user information about the data field.
- Format the line around the text box, and the text that the user types into the box.
- Limit the number of letters that can be typed into the box.

For more information see online Help or the screen tutorial, *Creating a PDF Expenses Form*.

3 Right-click the text field and then click **Form Field Properties**.

**4** In the **Name** text box, type 'First_Name'. Click **OK**.
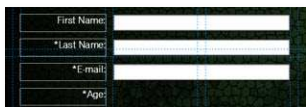
5 Repeat steps 1 and 4 to add two more text fields next to the 'Last Name' and 'E-mail' labels. Rename the boxes 'Last_Name' and 'Email'.

Next we need to add a form field for the age range. Although we could use a text field and get the user to type in their age, we don't need to be that exact. All we need to know is whether the user is under 18 or 18 and over. For this, we can use a radio button.

To add a radio button

1 On the Form toolbar, click 🔘 **Radio Button**.

2 Move the cursor next to the 'Age' label and click and drag to insert the radio button. (If you press **Shift** while dragging, the aspect ratio will be maintained.)
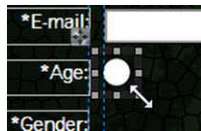
3 On the **Transform** tab, set the width and height to 0.7 cm.

To insert a second button, we can copy the first.

4 Press and hold the **Ctrl** key while clicking on the first button and drag it to the right. An exact copy is created.

> 📌 **Radio button properties**
>
> Radio buttons have special properties that include the Field Group. This allows buttons that belong to the same group to work in a mutually exclusive way, ie. only one button can be selected at a time.
>
> For more information about this and other radio button properties, see online Help or the screen tutorial, *Creating a PDF Expenses Form*.

5   Release the **Ctrl** key and position the button in line with the first with a grid column between the two.

6   Right-click the first radio button and then click **Form Field Properties**.

7   In the dialog, in the **Name** text box, type 'Under_18'. Click **OK**.

8   Right-click the second radio button and then click **Form Field Properties**.

9   In the dialog, in the **Name** text box, type '18+'. Click **OK**.

The default properties of the radio buttons will suit our needs for this simple form. However, we do need labels to tell the user what the buttons are for!

10 Click the 📄 **Standard Text Frame** tool and click and drag on the page to place a text frame next to the first radio button.

11 On the Text context toolbar, select the **Body Text Normal** style and type 'Under 18'.

12 Repeat steps 10 and 11 to add a label for '18 and over'.

Our next step is to add a form field for 'Gender.' As there are only ever two options for this, we can use a combo box.

To create a combo box

1   On the Form toolbar, click the 🔽 **Combo Box** button.

2   Move the cursor next to the 'Gender' label. Click and drag on the page to place the combo box.
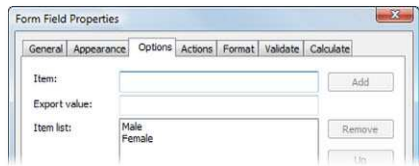
Now we need to set the properties.

3   Right-click the combo box and then click **Form Field Properties**.

4   In the dialog:

- On the **General** tab, in the **Name** text box type 'Gender'.

- Click the **Options** tab.

- In the **Item** box, type 'Male' and click **Add**. 'Male' appears in the **Item list** box.

- Repeat this process to add 'Female' to the list.

- Click **OK**.

The combo box is now complete. We need to add one more form field to our form—a check box.

To add a check box

1   On the Form toolbar, click the 🗷 **Check Box** button.

2   Move the cursor next to the 'special offers' label and click once to add the check box.

3   Right-click the newly placed check box and then click **Form Field Properties**.

4   In the dialog:

- On the **General** tab, in the **Name** text box type 'offers'.
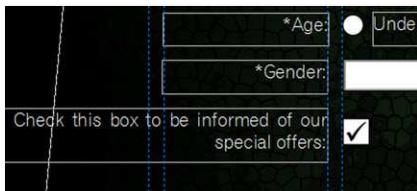
- Click the **Options** tab and select **Checked by default**.

- Click **OK**.

Our form objects are complete. However, before we can publish the form we need to add a **Submit Button** to allow the users to send the data to us.

PDF forms are only useful when you can collect the data. A good way to use this is to use the **Submit Button**. When the user clicks the button, the data is sent to either Serif Web Resources or to your own Web server. Setting this up is easy thanks to the **Form Submit Wizard**.

> To use Serif Web Resources, you will need to set up an account. For more information on form data collection, see the topic *Collecting data from forms* in online Help.

To add a Submit Button

1   On the Form toolbar, in the 🔲 ▾ button flyout, click the 🖱 **Submit Button**.

2   In the Form Submit Wizard:

   • Click **Next** to begin.

   • Click **Next** to use Serif Web Resources.

   • Type a Form ID or click the **Get a Form ID** button, then click **Next**.

   • Leave the **Data format** set to **html** and click **Next**.

   • Click **Finish**.

3   Click and drag on the page beneath the check box to place the button between the layout guides.

   Let's give the button a useful name.

4   Right-click the button and then click **Form Field Properties**.

5   In the dialog:

   • On the **General** tab, change the **Name** to 'Subscribe_btn'.

   • On the **Options** tab, in the **Caption** box type 'Subscribe'.

   • Click **OK**.
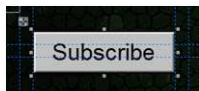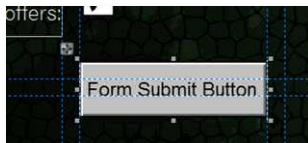
The button text is updated on the page.

That's it, your form is complete! To check your form you'll need to publish it to PDF (it's also a good idea to save your form if you haven't done so already). Let's look at this now.

You can export any PagePlus publication as a PDF file—not just forms. This project covers the basic steps and options. For more information, see *Exporting PDF files* in online Help.

To publish a PDF form

1 On the Standard toolbar, click
   Publish as PDF.

2 On the **General** tab, in the
   Compatibility drop-down list, select
   the appropriate Acrobat version.

3 Select the **Preview PDF File** check box, and then click **OK**.

4 In the **Publish to PDF** dialog, type a file name for the PDF, and save it
   in a convenient location.

The **Publish to PDF** dialog closes and your form opens in your PDF reader.

Now that you've finished your form, the final step is to create a link to it from a web page and upload it to your website. For more information on this and other web publishing features in PagePlus, see the section, *Producing web pages* in online Help.

💡 Your work is not finished yet—you still need to check your form to make sure that it works in the way you expect.

When checking your form, you should:

- Hover over the form fields and make sure that any ToolTips are spelled correctly.

- Make sure you can type into all text fields.

- Check that all fields are long enough to hold the typed text or predefined list item.

- Check the entries in the combo box drop-down lists—are the items spelled correctly, does all of the text display properly?

- Make sure that you can't select more than one radio button in a group.