ADOBE 5.0 FORM-MAKING MADE REALLY SIMPLE

A Very Quick Overview

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OVERVIEW

When filling out forms, you need to be using the "Hand" tool.

If you cannot type in a field on an Adobe form, you have two choices. You can use the "Free Text" Tool as described on the next few pages. Or you can create an Adobe "intelligent" form that can be used over and over again, as described starting on Page 7.

USING THE FREE TEXT TOOL

While this method is a bit slow and clunky, for simple non-intelligent forms, you may find that it is an acceptable alternative to creating a full-fledged intelligent form.

1. To use the free text tool, select the "T+". If its not visible. You may need to do "Window, Toolbars". Make sure they are all turned "on".
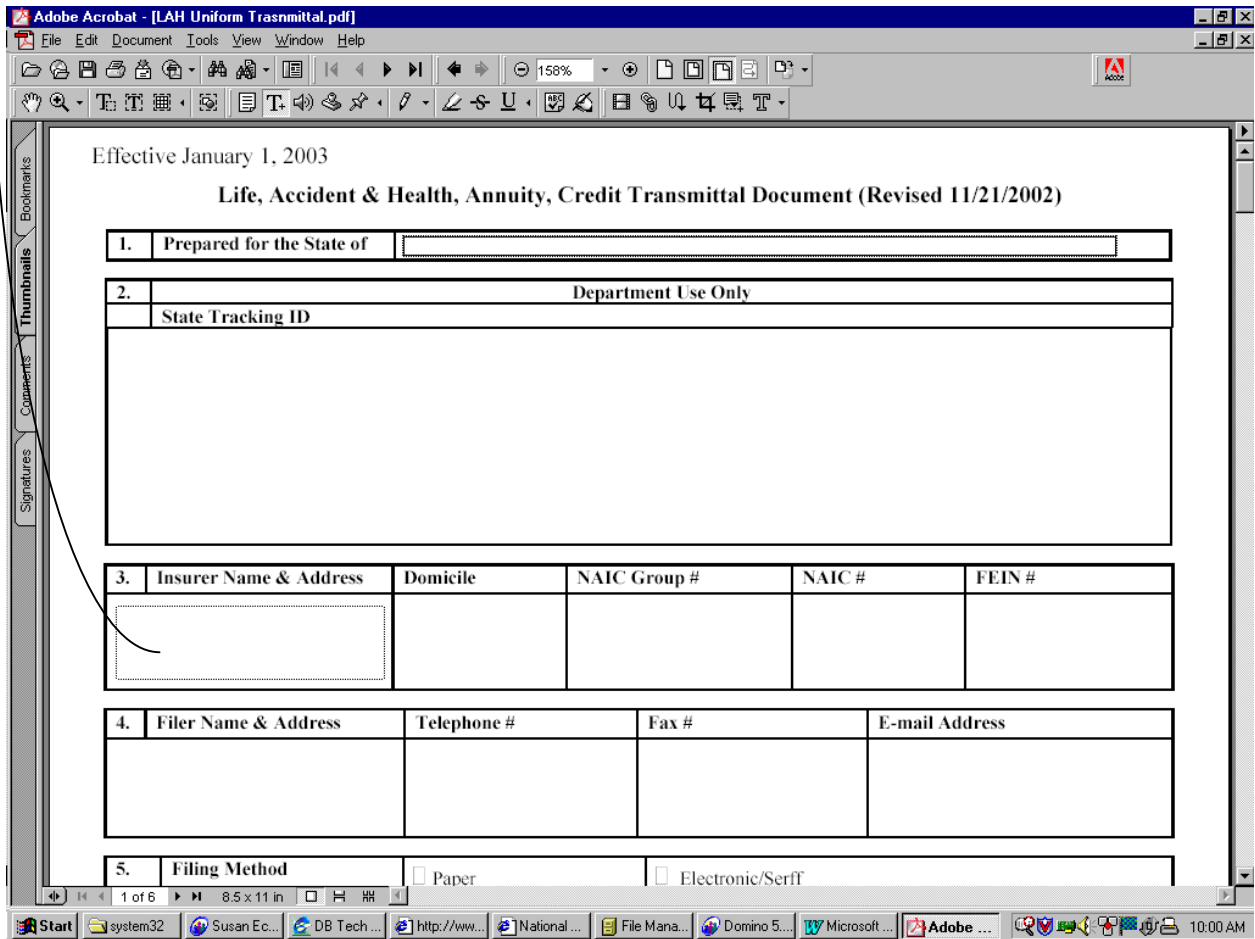
2. Once you click the Free Text tool, your cursor will turn into a dotted outline of a book or note. Point, click and drag a box exactly where you want the free text to appear. Starting in the upper left hand corner may be helpful.

3. Type your text in the box.

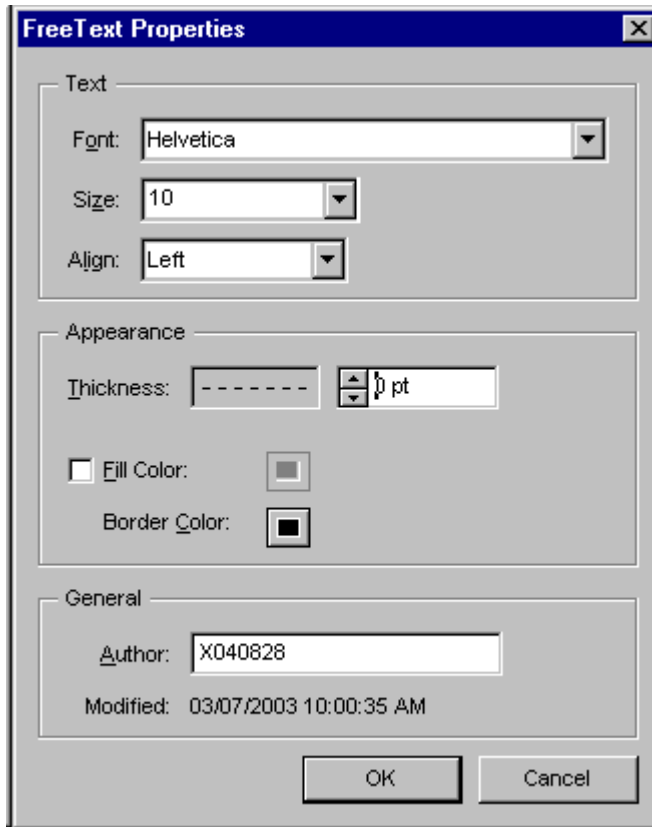4. Switch back to the "Hand Tool". As you move your cursor over the free text area, your cursor will turn into a pointer. If you need to resize the free text box, or move it, point and click with the arrow, and you can manipulate the size and location of the test area.

More…..

5. Using the "Hand-that turns into a pointer" mode, right mouse click on the free text entry to access the Free Text Properties. Change the thickness of the border (in the "appearance section of the box below) to ZERO pt, so that the outline of the box will not be visible. If needed, you can also do basic text formatting (changing font or size) from this box.

FreeText Properties ✕

Text

Font: Helvetica ▾

Size: 10 ▾

Align: Left ▾

Appearance

Thickness: - - - - - - - ▲▼ 0 pt

☐ Fill Color: ▣

Border Color: ■

General

Author: X040828

Modified: 03/07/2003 10:00:35 AM

OK   Cancel

CREATING AN INTELLIGENT FORM

1. To design an intelligent form you need to switch to Design mode, using the "Form Tool". (If this toolbar is not showing in your Adobe window, access "Window, Toolbars". Make sure they are all turned "on".)

In design mode, to add a "field", point, click and drag with your cursor to form a box (the outline of the field). This can be moved or resized later as needed.

The "Field Properties" box appears.
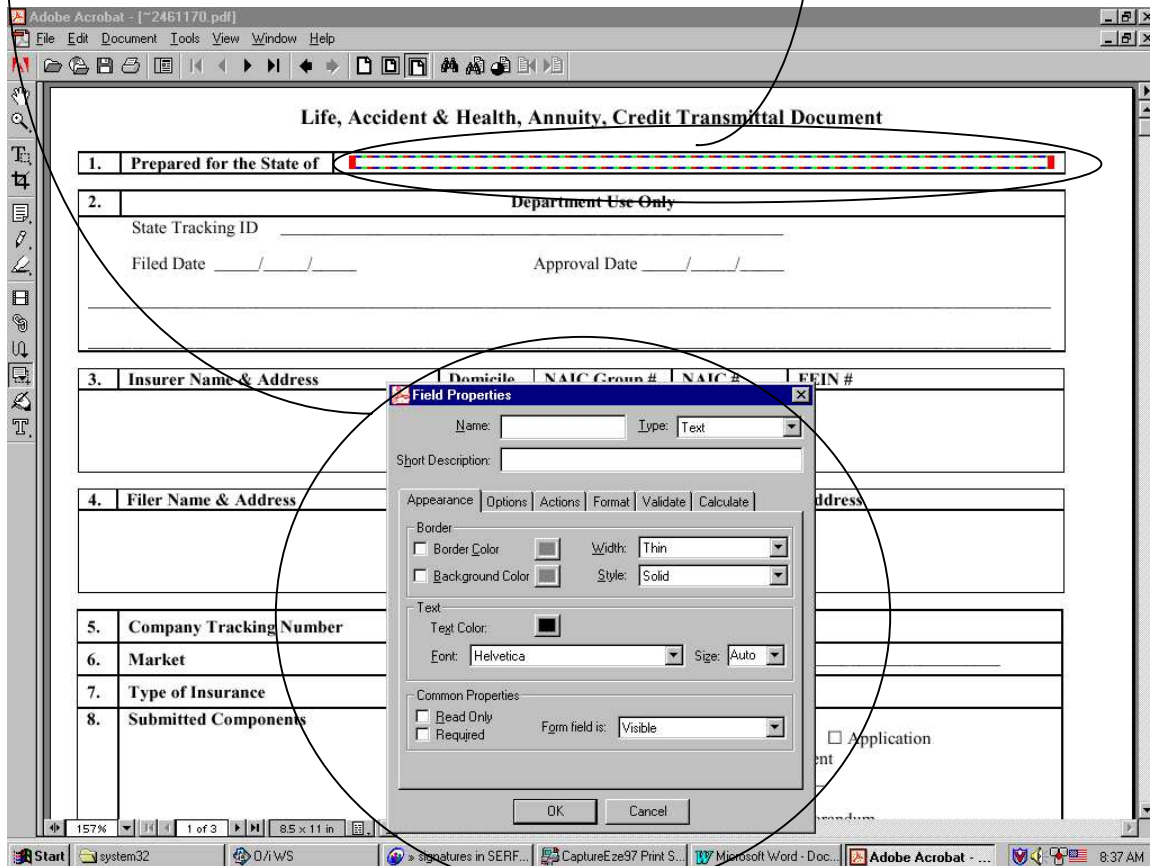
Regardless of the type of field, you always need to complete the following:

Name: Field names should be unique (except as noted later), and should be short and descriptive.

Short Description: This will display as "field help" for users.

Type: The following are available:

> **Button** - You will likely not use this choice.
> **Checkbox -** Used when a checkbox is needed.
> **Combo Box** - Used when you want the user to select a choice from a drop down list, or have the ability to add a new value to the list.
> **List box** - Like a Combo box, but the user scrolls through a list of available choices that are visible even without clicking a drop down box. There is no ability for a user to type their own item, but this field can be set up to allow multiple selections.
> **Radio Button -** Use when you need a radio button.
> **Signature -** Used for signatures.
> **Text -** Used where the user is to free-type their text.

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THE FIELD PROPERTIES BOX:

Depending on what type of field you choose, you will have one or more of the following "tabs" available to you on the properties screen, with additional field to fill out. In addition to the ones shown here, there are a few others which apply to only one or two field types. These will be described later.
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APPEARANCE TAB:

(Available for all field types)

On this tab you will set the font and type size. You can also add borders, or make the field read-only, or required   (the user can't save it the field is blank when required is selected.)

OPTIONS TAB:
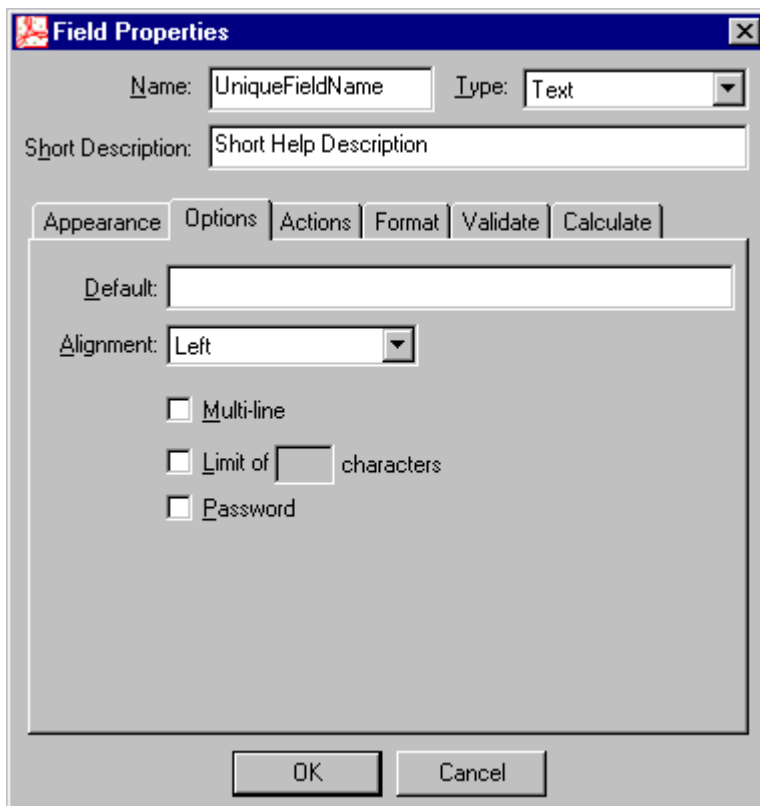(Available choices will vary, based on field type, not available at all for signature fields.)

For Text fields:

You can enter a default value for the field. You can also set alignment of the text in the field - Left, right, or center.
You can specify if it is a multi-line field. If you select this option, if the user types more information than can fit in the visible box, you will have to scroll to see the full contents of the field. For Addresses, it may be preferable to user three separate single line fields instead. Experiment.
You can limit the user to N characters (for example, limit of three characters if the value must be a three digit code.)
You can require a password to edit the field (not recommended. I have not yet figured this out)

OPTIONS TAB Continued:

If this is a list box or a combo box field, you use the options tab to add the list choices.
Type each list choice in the "Item" field, then click Add.

Use the "Sort" option to automatically sort alphabetically, or use the Up and Down buttons to move an item which you have selected up or down in the list.
For COMBO Fields only: If you choose "Editable, it will allow the user to enter a new value in the field.
For List Box fields only: If you choose "Multiple Selection", it will allow the user to pick multiple values.

OPTIONS TAB Continued:

If this is a Check Box or Radio button field, you use the options tab to designate a style of check mark or radio button, and specify whether the default value is checked or unchecked.

To make one or more **mutually exclusive check boxes** or radio buttons (for example, you want a set of mutually exclusive checkboxes for Yes, No and N/A), you should give each checkbox the same name (e.g. "CheckBox1") but for Export Value, give them each different value (e.g. Yes, No and N/A).

ACTIONS TAB:

I have not used this, but your tech people may have ideas.   These would be scripts that execute when the user's cursor moves into or out of that field, or a button is pushed.
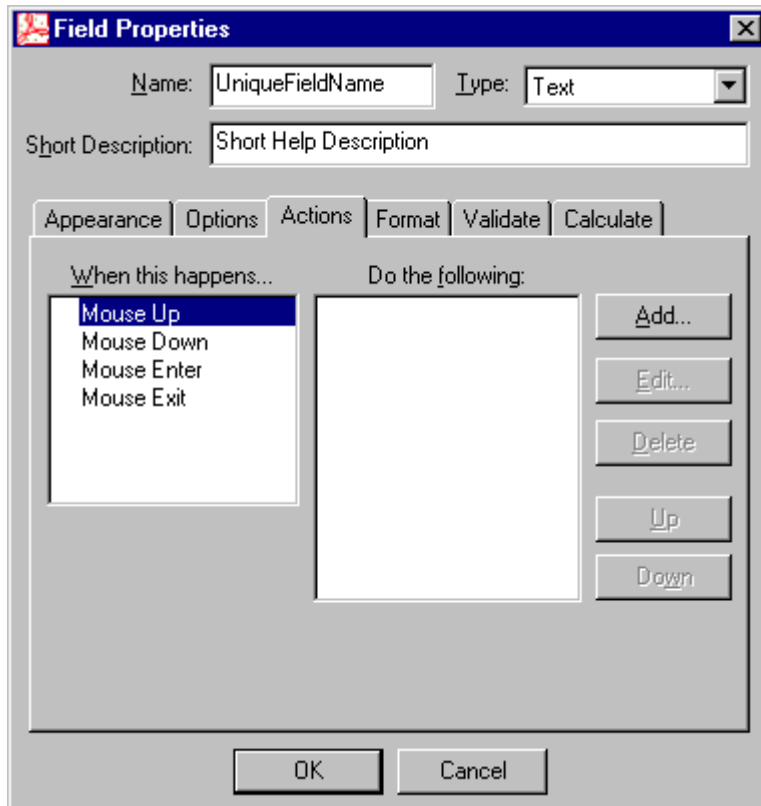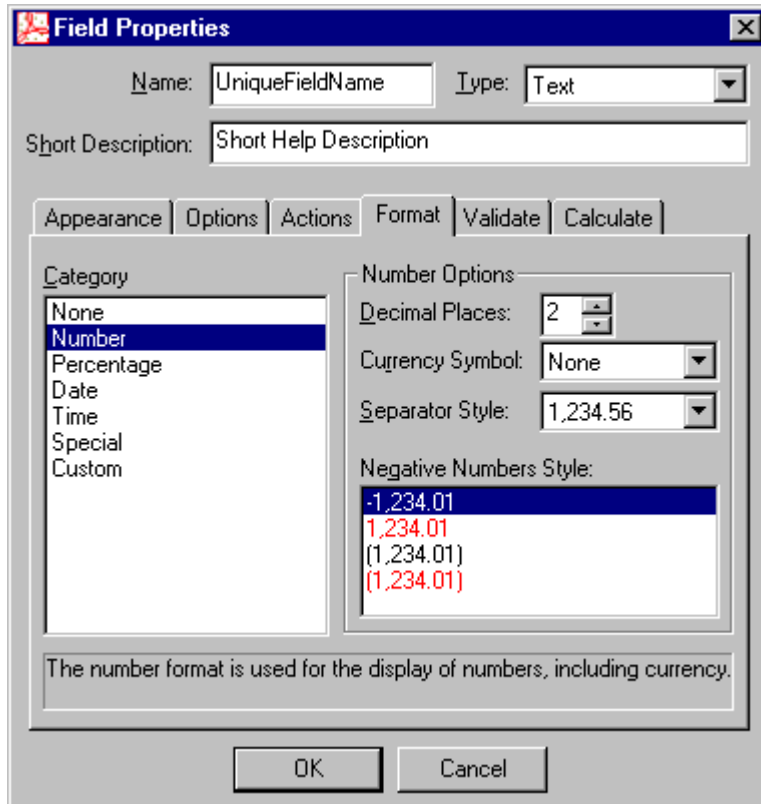
FORMAT TAB:
(Available only for Text or Combo fields)
Use this tab to specify numeric, currency or date formats for text fields.
Specifically you can set decimals, currency symbols and separator style.

Note: if a particular field might begin with a zero, you should make it a text (i.e. format - NONE) field rather than a number field. Using a numeric format Adobe will always parse leading zeros.

VALIDATE TAB:
(Available only for Text and Combo fields)
I have not used this, but your tech people may have ideas.

CALCULATE TAB:
(Available only for Text and combo fields)
I have not used this, but your tech people may have ideas.   It looks like it would be useful for calculating fees.

SELECTION CHANGE:

(For List boxes only)
I have not used this but your tech people might have ideas.

SIGNED TAB:
(Available for Signature fields only)

I have not used this, but your tech people might have ideas).

SETTING TAB ORDER:

When you are all done, you need to set the tab order (unless you created the fields in the exact correct order.) To do this use Tools, Forms, Fields, Set Tab order. Little numbers will appear next to all your fields, and your cursor will have a pound sign attached to it. You must click through ALL the fields in the order you want them to appear in the tab order. If you mess up, you have to start again.

Miscellaneous Hints and Tips:

Test often. Toggle back to "hand mode" to see if your field behaves as expected.

Once you have created a field, you can click once on it to "select it", and use Crtl-C to copy and Ctrl-V to paste. Drag the new field to its correct location. Remember to change the name of the copied field. They usually should be unique. If you don't change the name, filling out either field will populate BOTH fields.

You can copy and paste multiple fields by holding down the control-and shift keys while you select multiple fields.   You can also reposition a collection of fields this way, and change limited "Properties" (such as font)

To really "fine tune" the size, shape or location of fields, use the ZOOM function to get in real close.

Use signature fields where signatures will be expected. Signatures cannot be pasted into a "text" field.

Check out Adobe's on-line help, (Help, Acrobat Guide, Creating Adobe Forms) but do not open the "Help" while the form is in design mode. It tried to open the help database in design mode too.

Test often. Toggle back to "hand mode" to see if your field behaves as expected. I repeated this intentionally because its important. There is no "undo". I also suggest you save often.

Generally, field names should be unique (unless creating mutually exclusive checkboxes or radio buttons as described earlier).   Adobe will not prevent you from entering a duplicate field name. If you do so, then when the user interacts with the first field by that name, all subsequent fields with that same name will automatically get the same value that the user entered. In some cases, you might actually want to do this. That is, if the user picks "Choice A" as a checkbox, perhaps 6 other checkboxes should then automatically get Xed as well.