General

This tab allows you to change the name of your field, add a tool tip, and choose the field visibility. Additionally, You can make a field read only and required from this tab.

Appearance

This tab allows you to apply a border and color to your field. You can also specify the font, font color, and font size on this tab.

Position

This tab allows you to enter manually the values to position your field.

Options

This tab lets you set the alignment for the text in your field. You can specify other field properties, such as password, check spelling, multiline, scroll long text, and allow rich text format. Additionally, you can limit the number of characters that can be entered in to the field.

Actions

On this tab, you can set actions based on specific behaviors. For example, you can open a menu when a person mouse up.

Format

You can specify the format for dates, numbers, time, and other information on this tab. For example, if you want numbers to appear with 2 decimal places, you can make those selection from this tab.

Validate

On this table you can specify valid entries for a field. For example, you set whether a person can enter a value greater than 500 or less than 0.

Calculate

You can use this tab to perform simple calculations, such as sum, subtract, etc. Advanced calculations can be performed using JavaScript and the Custom calculation script option.

WEB RESOURCES

Acrobat User Guide

https://helpx.adobe.com/acrobat/user-guide.html

Convert forms to fillable PDF

https://helpx.adobe.com/acrobat/how-to/convert-word-excel-paper-pdf-forms.html?set=acrobat--fundamentals--pdf-forms

Google Search

You can find videos and instructionons on Adobe Acrobat DC and formsand other topics. To find tutorials on this topic, type the following in the Google search box:

How to create interactive forms in Adobe Acrobat DC

Youtube Search

Youtube offers many videos on Adobe Acrobat DC and forms among a host of other topics. To find videos on this topic, type the following in the Youtube search box:

How to create interactive forms in Adobe Acrobat DC

CSU Skill Port

Skill Port provides over 10,000 courses on a wide range of topics. These courses are free to all CSU employees. This online computer-based training includes courses on Excel 2016.

1. Click Browse the Catalog
2. Select Skill Choice Desktop
3. Select Desktop Curricula
4. On the left, select Adobe
5. Scroll through the topics on the left
6. Select Adobe Acrobat DC
7. Select Working with Adobe Acrobat DC
8. Click Launch to start the course.

NOTES

LEARN MORE AT:

Adobe Acrobat Professoinal DC

http://www.csub.edu/training/pgms/aafrms/index.html

CAMPUS TRAINING

Tammara Sherman
Campus Technology Trainer

(661) 654-6919
tsherman@csub.edu
www.csub.edu/training/

Adobe Acrobat Professional DC
Fillable Forms

OVERALL AIM:

To teach you how to create fillable forms using different applications and Adobe Acrobat Professional.

LESSON OBJECTIVES

At the end of the session, the participants will be able to:

- Articulate function and purpose of Adobe Acrobat Professional
- Distinguish between Adobe Acrobat Reader and Adobe Acrobat Professional
- Identify the steps required for planning, designing, and creating a form
- Identify form design best practices
- Create a form using Word 2016 and export as PDF
- Use Prepare Form to create a fillable form
- Use Edit Form to make minor changes to a form
- Enhance your form by using drop downs, radial buttons, etc.
- Print the form
- Test your form

REFLECTIVE QUESTIONS

- How should I organize the content on my form?
- How can I make my form easy to use?
- Is there a way to complete a non-fillable form electronically?
- How can reduce errors and omissions?

ADOBE ACROBAT PROFESSIONAL

Adobe Acrobat Professional is a versatile application that allows you to take any document and convert it to a Portable Document Format (PDF). You can also edit, send, and protect documents with it. You can scan documents to it. Additionally, you create forms using its Prepare Form feature. Lastly, you can export PDF document to Word and other applications.

ACROBAT READER AND ACROBAT PROFESSIONAL

Adobe Acrobat Reader is a free application. It allows you to view and read PDF documents. Adobe Acrobat Professional has the same capabilities as Adobe Acrobat Reader, but much more.

The table below shows the similarities and differences between the 2 products.

Functions	Acrobat Reader	Acrobat Professional
Read PDF	■	■
Fill in form fields	■	■
Add some highlights	■	■
Create PDFs		■
Export to Word, Excel, and PowerPoint		■
Scan documents into PDF		■
Create Fillable Forms		■

FORMS DEVELOPMENT

Forms development involves many steps beginning with planning the form and finishing with testing it. In between these steps, you should consider the best practices for developing and distributing forms.

Plan the Form

Before you start creating your form, you should take some time to plan it. You should ask yourself some basic questions, such as:

1. What will the form be used for?
2. What business processes are associated with the form?
3. What inputs are necessary to complete the form?
4. How and where will the information from the form be used?
5. Who will use the form, such as the completer and the processor?

Your ability to answer these questions will help ensure that your form will generate the results you expect.

Identify Information to Capture

Your response to question 3 above will help you identify information to capture for your form. Common information captured on most forms include:

- Contact information
- Approval/Authorization Information
- Billing Information
- Selections

Identify information to Provide

Your responses to the other questions will help you identify information to provide either on the form or along with the form. Common information provided with most forms include:

- Handling/Processing Information
- Your organization information
- Instructions

Best Practices for Form Design

Lastly, it is important to know the best practices for form development. A plethora of information exists on this topic. I have included just a few for your consideration.

- Think carefully about the form layout.
- Consider the overall flow of your form design.
- Storyboard your layout on a whiteboard or use post-it notes
- Eliminate non-essential information
- Top-left aligned labels increases readability
- Group related information together in sections or steps
- Design fields to reduce the number of clicks
- Use checkboxes and radio boxes when possible
- Size input fields accordingly
- Ensure form can be navigated using tabs
- Avoid splitting fields, ie. Phone numbers
- Test your form before implementing

Form Creation Process

To create you form, you can use any application that is capable of producing a PDF. Most people choose to create their forms in either Microsoft Word or Excel. Both applications have strengths and weaknesses when creating forms.

If you choose to use Excel, please note that your formulas will not convert to the PDF. You could create your form using Adobe Acrobat Professional, but it would take longer.

1. Create form
2. Convert to PDF
3. Open PDF in Adobe Acrobat Professional.
4. Use the Edit PDF to edit text, objects, or images.
5. Use the Prepare PDF to add, edit, or delete form fields.
6. Test the form using Acrobat Reader, if possible. You can use Acrobat Reader to test it out or the Preview function in Acrobat Professional. I recommend using both, so you can see what the completer will see.

EDIT PDF

The Edit PDF tool allows you to edit text, labels, and other objects on your document. Additionally, you can add text, images, hyperlinks, header and footers, and more.

Edit

With the Edit button activated, you can move, delete, and edit text labels and other objects on your form. For example, if you find a typo, you can use correct the text. To activate edit mode, click the Edit button.

Add Text

The Add Text button does as it name implies. You can add text.For example, you can add another line of text to your heading or a revision date for your form. Also, you can use it to add text for a new field.

Add Image

Add image allows you to add pictures or images to your form. You can use it to add your logo or other related visuals.

Link

The Link button lets you include hyperlinks. The hyperlink can be another document, a website, and more. Additionally, you can use this button to list all the links in your document on a separate page and remove links.

Crop Pages

Crop pages allow you to hide information outside of a selection. When activated, you select the information to be visible and double-click it. The selected information will be visible and all other information hidden (not deleted).

Header and Footer

The Header and Footer button allows you to add, update, and remove the headers and footers in your document.

The dialog box is laid in an easy-to-use manner.

- Just fill-in the necessary boxes.
- The Preview section makes it easy to see what you doing.
- When you finished, click OK. You can apply your changes to multiple files, as well.

Watermark

The Watermark button lets you to add, update, and remove the watermark in your document. You can addd watermarks, such as Draft, Confidential, or any text you prefer. The dialog box includes a Preview, so you can ensure your watermark is placed as desired.

More

From the More menu, you can add a background, Bates Numbering, bookmarks, attached files, and Article boxes.

PREPARE FORM

The Prepare Form tool allows you to add text boxes, check boxes, radial buttons, lists, and drop down boxes. You can add buttons, image fields, date fields, and more. Lastly, you can use to edit boxes and other objects on your form.

Labels

Labels are the field descriptions. They help the completer understand what type to enter into a field. In the illustration above, First Name is a label. This label can be edited using the Edit PDF tool.

Fields

Fields are containers for the information to be entered. The label and the field may have the same name, such as in the illustration.

Types of Fields

Adobe Acrobat supports many types of fields. The common are listed below.

Type	Icon	Description	Best use
Text Box		Short or long free form text	Names, addresses, Purpose, etc.
Check Box		Selections based on checking a box	Selection of 1 or more items
Radial button		Selection of one option.	Mutual exclusivity, ie. Yes or No, approved or rejected
Drop Down		Selection of 1 or more options. Increases accuracy of information provided	Lists, such as accounts, meal options, business units.
Button		When clicked, it performs a defined action	Print, Reset fields, etc.
Date Field		Designed for dates.	Dates, especially when other systems or calculations will use the information.

Preview / Edit

You can toggle between Preview and Edit more. In Preview mode, you can test your form, including entering text.

Field Organization

When working with fields on your form, you may need to edit their organization. Your options for organizing fields include align, center, match size, and distribute.

Align	ALIGN	With Align, you align your fields vertically and horizontally with other fields in your document. You can choose from left, center, and right alignment.
Center	CENTER	Within a field, you can center your text. Your choices for centering your field text includes horizontal center, vertical center, or both.
Match Size	MATCH SIZE	With Match Size, you can make your sure your field are equal in width and height. You can match the height, width, or both of another field.
Distribute	DISTRIBUTE	Distribute allows you to ensure that equal spacing exists between two or more fields. You can distribute the space either vertically or horizontally.

More

The More button opens a menu with many options. The common options are Show Tab Numbers, Highlight Existing Fields, and Clear form. Other options include importing and exporting data merging data files into spreadsheets, and setting field calculation order.

FIELDS

The Fields section contains menus for tab and field order and a list of the fields in your document.

Tab Order Menu

This menu allows you to select how you want the completer to tab through your document.

Field Order Menu

This menu allows you to choose how you want the fields displayed while you are using the Prepare Form tool. Your choices are alphabetical or tab order.

WORKING WITH FIELDS

Several options are available for working with the fields in your document. These options include properties, rename, set as required field, add a new field, delete, create multiple copies, show tab numbers, and use current properties as new defaults.To access this menu, right-click on the desired field.
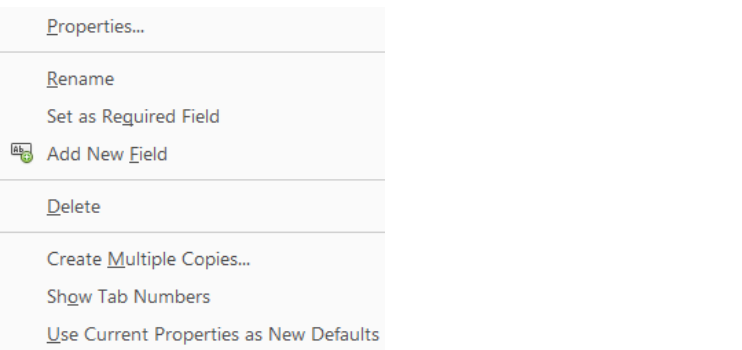
PROPERTIES PANEL

Each field has properties that define its formatting, actions, and other attributes. To access the field properties, right-click on a field and select Properties from the menu.

The Properties Panel has several tab: General, Appearance, Position, Options, Actions, Format, Validate, and Calculatios.