

Introduction


To create a professional looking and fully functional form, use Adobe Acrobat 8. These programs will provide you with the tools you will need to create a form from an existing document or create one from scratch. You will be able to distribute these forms electronically, allowing for the user to complete it online, save it with filled fields saved, print, and then attach to an email for submission. The entire process can be done electronically, with no hard copies needed, or can also be printed as needed.

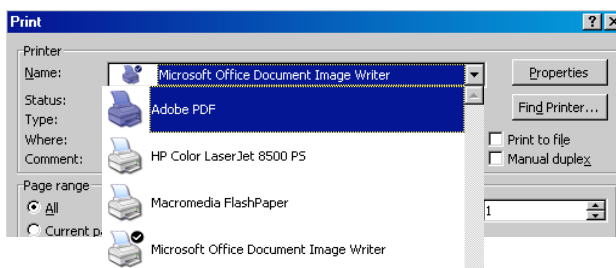
(These instructions will be suitable for using this program on a Mac or a Windows computer.)

Preparing Your Document

1. Before opening Adobe Acrobat, create the document that you wish to use as your form in a word processing program such as **Microsoft Word**. It will be easiest to create the document without the lines, buttons or boxes that you wish function as your form fields, as they will have to be removed later in Acrobat and then replaced with functional form features. Leave appropriate spaces in the document where you plan to place the interactive form fields, but leave them out when you finally save this document.

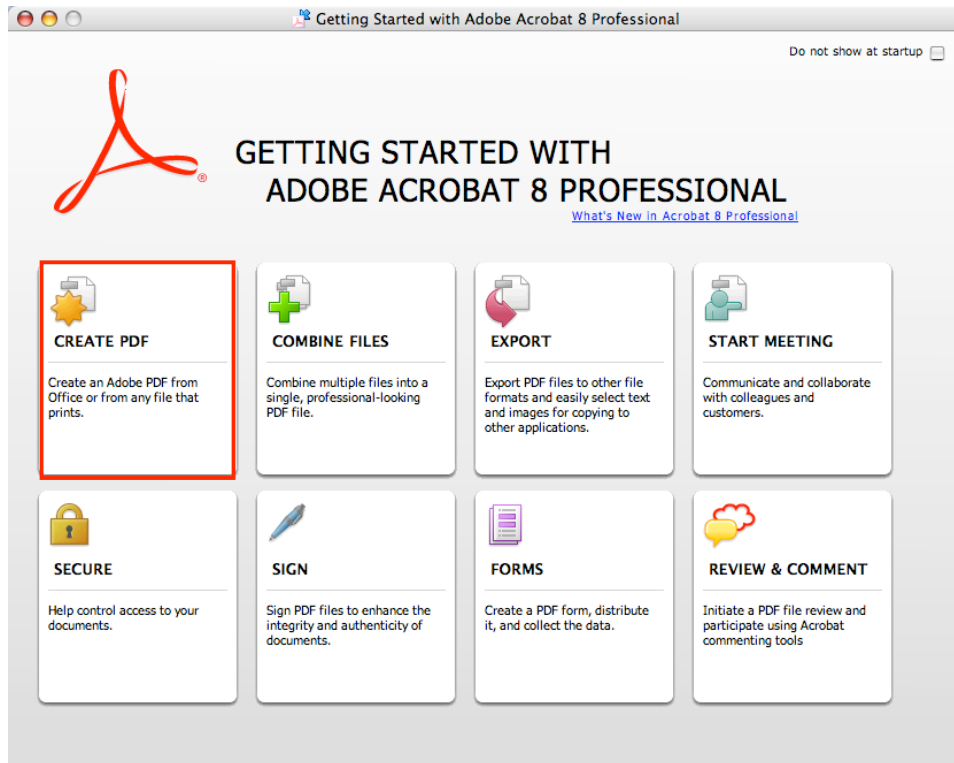
Name Address Male Female	Yes	Name _____ Address _____ Male <input type="checkbox"/> Female <input type="checkbox"/>	No
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2. Be sure the layout of this document is precisely as you wish it to appear, because modifying the text and layout will be difficult and time consuming once you begin construction of the form fields.
3. Once it is ready, it must be saved as a .doc, then saved again as a .pdf. To convert to a .pdf depends upon the way in which your computer is configured. If you have the pdf converter icon in your Word toolbar  you can select it and create the .pdf document by following the steps that appear on your screen. If you do not see these icons, you can do this by beginning the processes of printing the document (File>Print). You should find a choice of a pdf printer in the list of printers. Select this. It will not actually print anything, but it will convert the .doc to a .pdf. It is the .pdf version that you will need to use when you open Acrobat Pro.

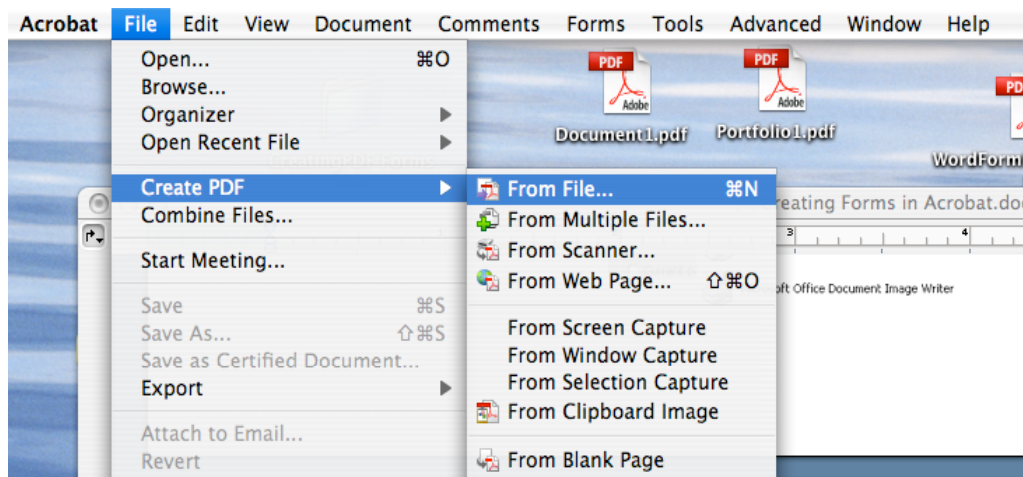


Opening Your Document in Adobe Acrobat 8 Professional

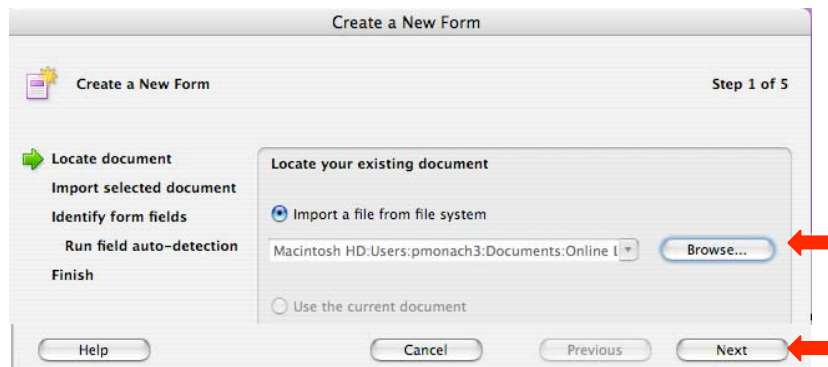
1. When you open the program you will most likely be presented with this welcome page. Although you will be creating a form, I would recommend not selecting that at this point. Begin instead by selecting “Create PDF.”



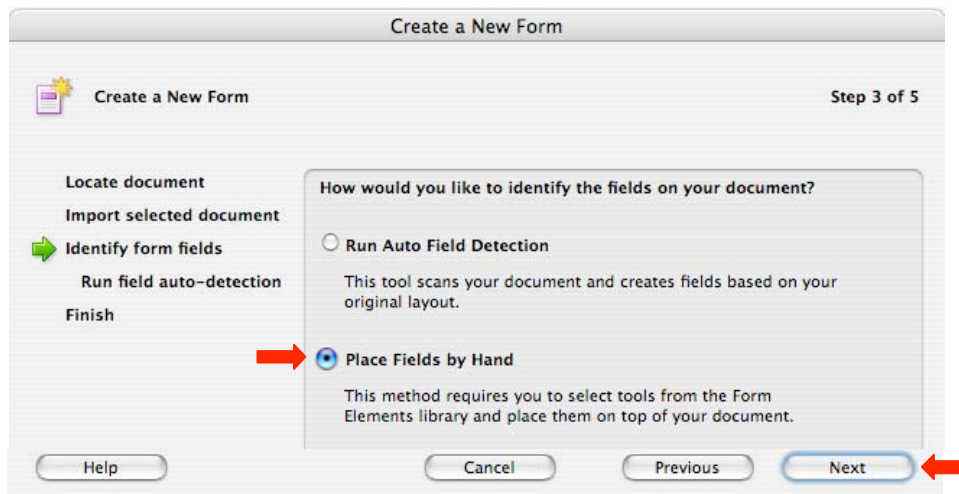
If the Welcome Page does not open when you open **Acrobat**, select **File>Create PDF>From File...**



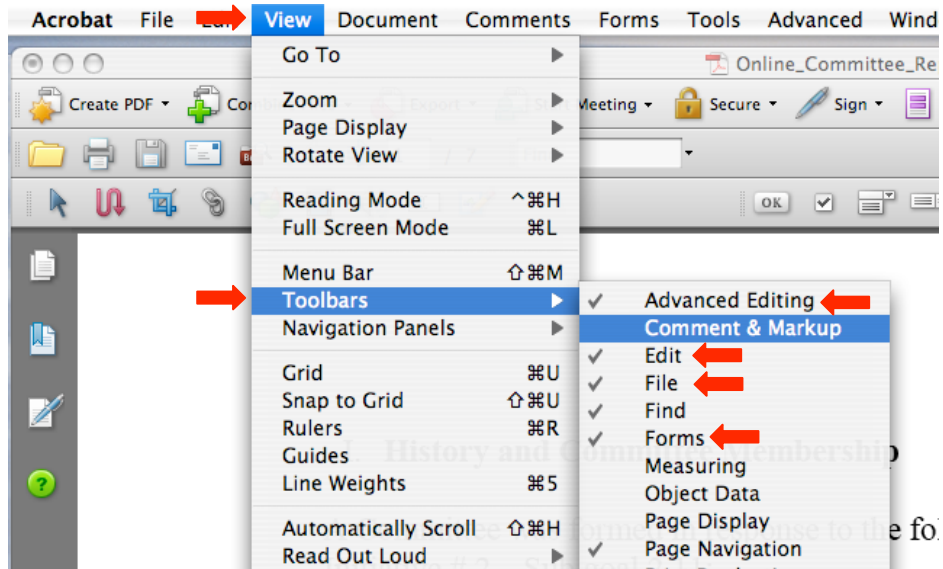
2. You will be prompted to **Locate** the document. Select the **Browse** button to search your directory for the .pdf document you plan to convert to a form. In this case it would be the one you just created. Once you have located it, select **Next**.



3. Acrobat will run an Auto Detection scanner if you wish, or you can create fields manually. Depending upon the document you are converting you may find that the results of an Auto Run will range from not finding any fields to coming very close to setting things up properly. To learn how this works it would be best to select **Place Fields by Hand** at this time.
4. Select **Next**.



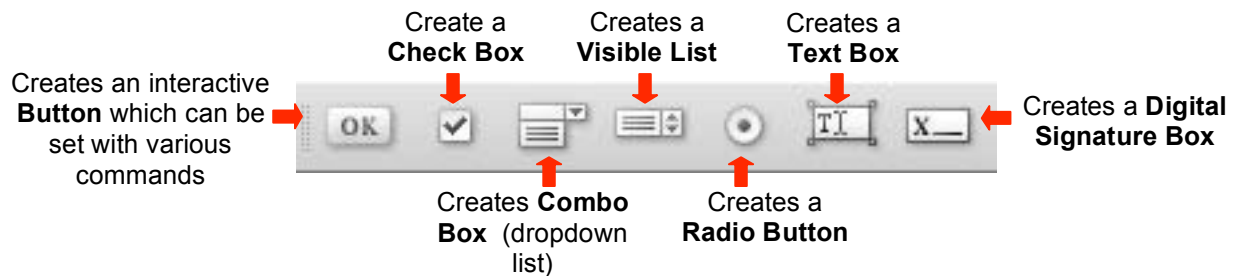
5. The document will open. You should begin by making sure all necessary toolbars are open. Select **View>Toolbars>** and be sure select at least **Advanced Editing, Edit, File** and **Forms**.



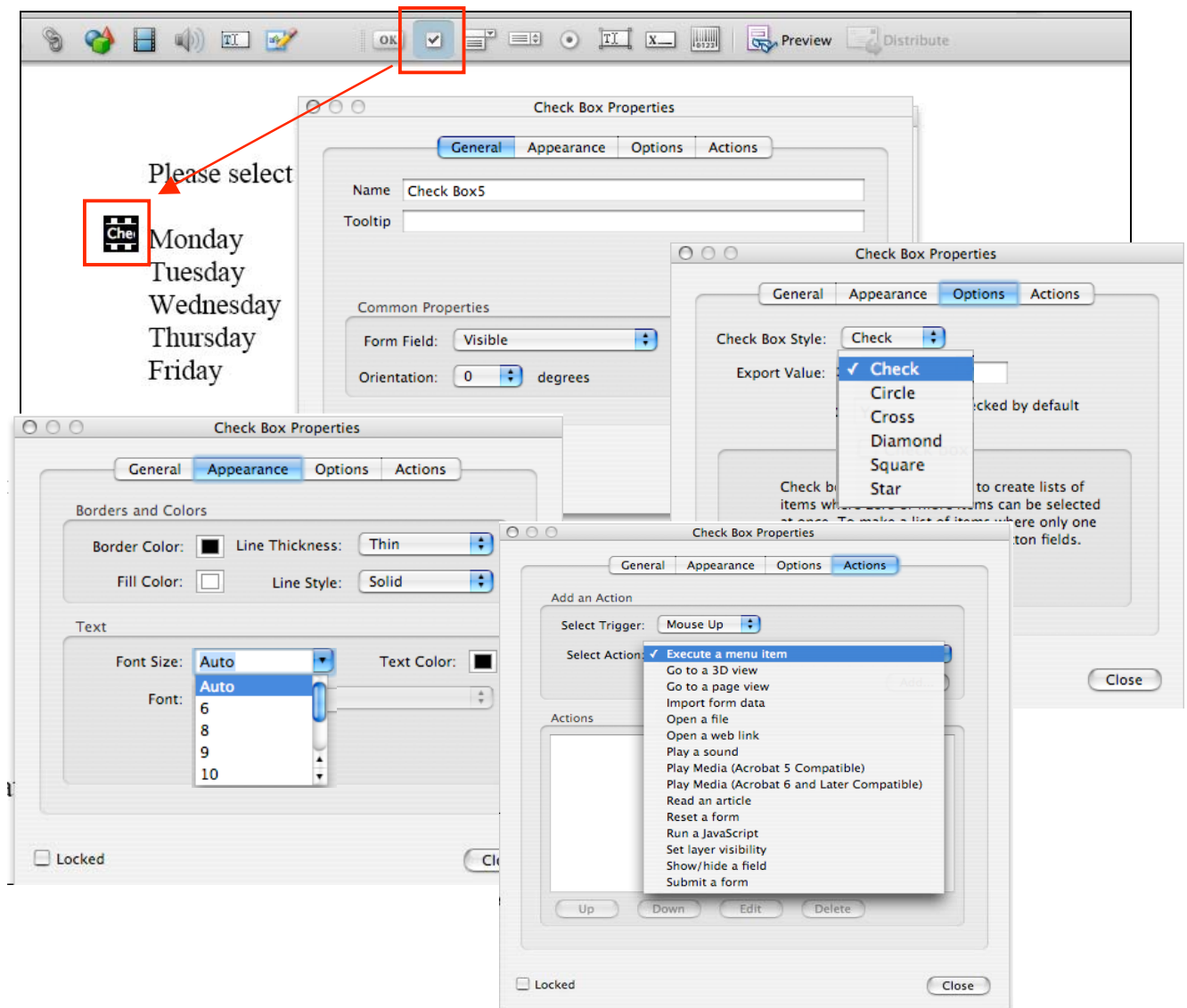
6. *A very good practice at this time is to also perform a **SAVE AS** and rename the document before making any changes to this version. In this way you can always revert to the version that you started with in case the changes that you have make and save in this session do not prove to be suitable. You can always delete unwanted versions when you have completed the task. It is also wise to save the changes that you make quite often, because creating forms in Adobe Acrobat Professional uses a great deal of your computer's resources, so the possibilities of Adobe Acrobat freezing or causing other problems could cause you to lose a great deal of hard work if not frequently saved.*

Creating the Form Fields

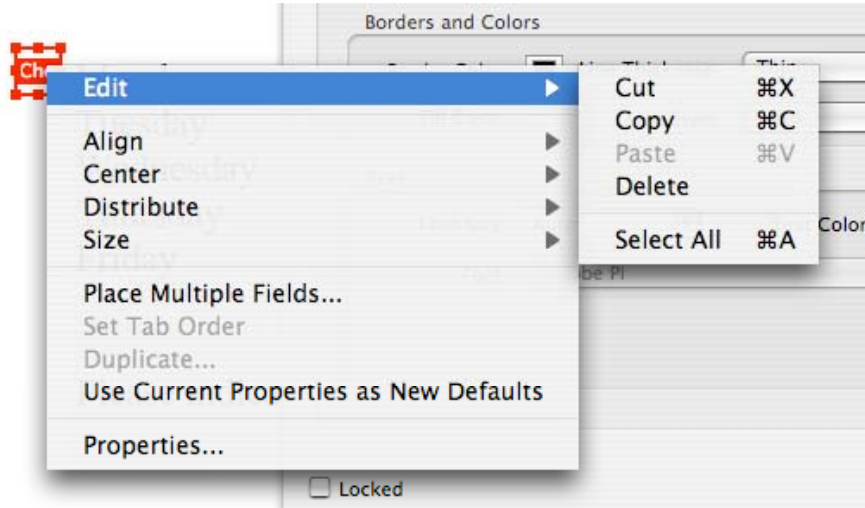
- The key to creating the form fields is having the **Forms** toolbar open. Each tool creates a different kind of form field:



- To begin, click on the tool you wish use to select, then double click on the document. The editable frame of the form field will appear and the **Properties** box for the tool will open. The settings will be different for each of the kinds of form fields, but the basics are the same.



3. Set up this form field object so that it can be filled out by the user to provide you with accurate information. Note the **Name** given this object. If you need to create multiple similar form fields, you can copy and paste the object (right click on it) or use the **Place Multiple Fields** function. You can then open the **Properties** box of each object (see above #1) and rename it with something unique. In that way you can quickly create multiple objects, but ensure that each provides unique information.



4. To move an object you can click on the object and drag it anywhere on the document.
5. To create different form fields the process is the same. However, each object has different specifications and settings unique to the kind of information that it will provide.
6. In the end you can see what your objects will look like and by selecting the appropriate tool you can continue to edit the document.

Please select the day of the week.

Monday
Tuesday
Wednesday
Thursday
Friday

Please indicate your favorite color from these options.

Red
Blue

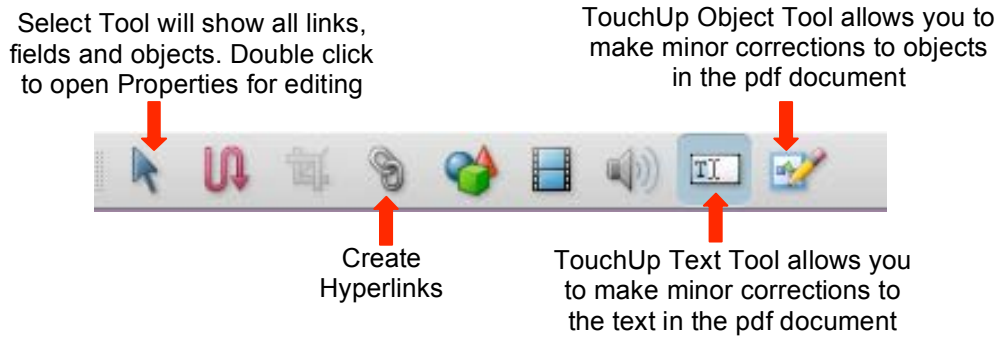
List Box6

Please enter your name:

First

Last

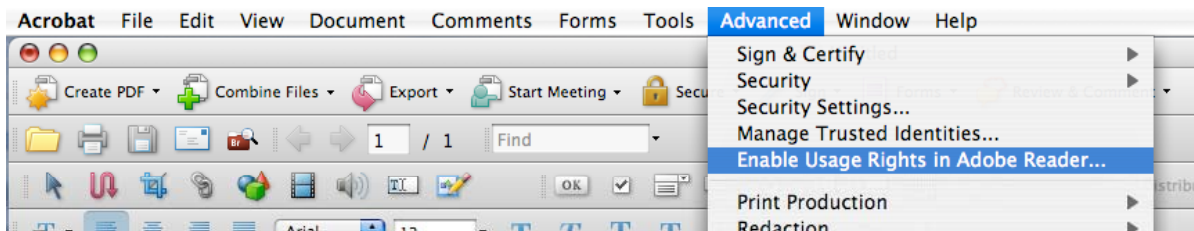
- As you work through the document, you may need to make some edits to the text of the document. Use the tools in the Edit toolbar to do these:



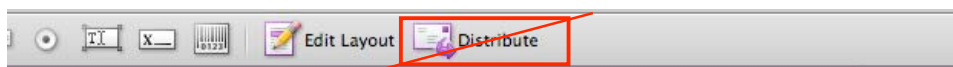
Preparing the Form for Distribution



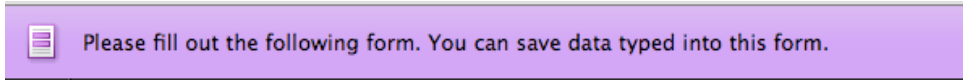
- At any time you can select the **Preview** button and see what the form will look like to users and to test each form field prior to saving and distributing the form.
- When you distribute the form you will want the user to be able to open the document with **Adobe Acrobat Reader**, fill in the form fields, save the document with the data, print, and reopen to edit or send the document as an attachment. To do so, you must select **Advanced>Enable Usage Rights in Adobe Reader...**



- Prior to distribution, **Save** the document. Then close it. In its present form, this document can be **attached to an email** or provided as a **link from a website**. **Do not attempt to use the Distribute** function in the toolbar, as this requires you to have the form created with a **Submit Button**, which is a much more complicated procedure.



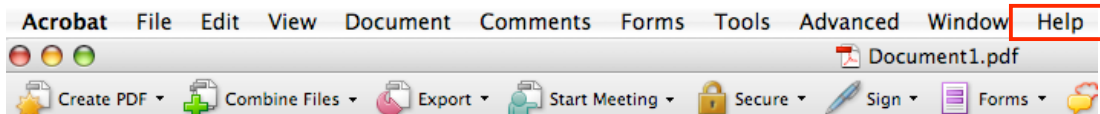
- The user will be able to open the form with **Adobe Acrobat Reader**. If the version of Reader is outdated, a message box will appear to direct the user to download the most recent free **Adobe Acrobat Reader**. When the form opens, the following box appears at the top of the form:



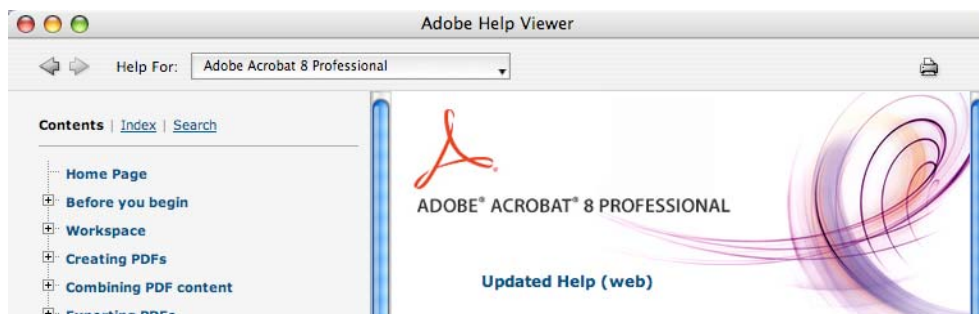
- The user can now return the completed document to you as an attachment to an email, printed as a hard copy or saved electronically on a portable drive or in a folder in an accessible location. The user can retain the electronic version of the completed form in his/her own files as well.

Accessing Additional Help

- If you have questions about using Acrobat 8 that are not explained in this document, you can access a very complete **Adobe Help Viewer** by selecting **Help** in the Menu Bar.



- You can utilize the **Contents**, **Index**, or enter text in the **Search** bar to locate documentation to help you find the answers to your questions.



Acrobat 9 and LiveCycle Designer

Adobe LiveCycle Designer is used with **Adobe Acrobat 9** to create and manage forms. It is more of a design and layout program which offers many templates. It is a very different approach to creating a form, offering a wider array of tools and controls, but also requires some training and practice. It also should be noted that once a document is created with LiveCycle Designer, it cannot be opened and edited in any other Acrobat program.