

1.4 Creating and Arranging Forms in Acrobat

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Converting Documents into Interactive Forms

A user can best create an interactive (or dynamic) form in Adobe Acrobat after all major file conversions, text editing and image editing have been completed for a working PDF document. Additionally, adding electronic form elements in Adobe Acrobat is carried out more effectively with documents designed as static forms (ie., documents that already contain bordered areas and contextual information for each form input).

Creating an Interactive Form

After opening a PDF file (preferably a static form with completed text and image revisions), all form elements are managed through the **Prepare Form** tool found on the **Tools** page. Navigate to this tool and select 'Open'. Before pressing 'Start', find the 'Form field auto detection' status indicator, located below the 'Start' button. Selecting the 'Change' link next to this indicator will open a preferences window.

The Prepare Form Preferences Window Includes:

- The 'Automatically adjust tab order when modifying fields' option (for preserving a document's reading order as form fields are added). This is recommended to be left 'checked'.
- The 'Show text field overflow indicator' option (to notify the content creator of incompatible text and form field sizes). This is also recommended to be left 'checked'.
- And the 'Automatically detect form fields' option (which autogenerates form elements when converting the document to an interactive form). This is recommended to be 'unchecked' as adjacent text and separation lines will often create new form elements out of error.

It is, in many cases, more efficient to manually add form elements. Once you have adjusted any preference window options, select 'OK' and then 'Start' to convert the document to an interactive form.

Arranging Forms Using the Prepare Form Tool

After converting a PDF document to an interactive form, form elements can now be added within the **Prepare Form** editing window.

Selecting a Form Element

All basic form elements are selectable from the **Prepare Form** main toolbar, located directly above the editing window. Form elements and options in this toolbar, ordered from left to right, include:

- Text field (for standard text inputs).
- Check box (to be selected and unselected).
- Radio button (to be selected and unselected).
- List box (for selecting contextual options within an open list).
- Dropdown menu (for selecting contextual options within a dropdown menu).
- Action button (for activating a clearly labelled custom button such as to 'Print' or 'Clear' the form).
- Image field (for activating an imaged based button with a custom function).

- Date field (for calendar date inputs).
- Digital signature field (to type or electronically sign a form).
- And the barcode field (to input a scannable barcode).

The 'Cursor' option, also located in the **Prepare Form** toolbar, allows the user to select, resize and move existing form elements. For placing multiple form elements of the same type, the 'Keep tool selected' option can be toggled within the same toolbar.

Additional Form Arrangement Features

The 'More' dropdown menu, also located on the Prepare Form righthand toolbar, has other useful form arrangement options.

The 'Duplicate Across Pages' Option:

- Allows selected forms to be duplicated across all or a selected range of pages.

The 'Create Multiple Copies' Option:

- Allows forms to be copied down or across a page for an adjustable number of times.

From an open dialogue window, the size of all copied form elements can be adjusted with the 'Overall Size' 'Width' and 'Height' options. Selecting the position buttons under 'Overall Position' will allow slight adjustments to the position of all copied form elements. Press 'OK' to finalize these adjustments.

The 'Show Tab Numbers' Option:

- When selected, allows the user to see the tab order of all form elements within the document.

Positioning Form Elements in a Grid

All fields can be uniformly locked to a visible grid for even spacing and positioning within Acrobat. To activate the 'Snap to Grid' feature:

1. Navigate to **View** located in the top menu bar of Acrobat and expand the 'Show/Hide' dropdown list. Expand 'Rulers & Grids' and select 'Grid' to show the Acrobat positioning grid. This will display a visible grid over the document for reference.
2. Again, navigate to **View**, 'Show/Hide' and then 'Rulers & Grids' to activate 'Snap to Grid'. All fields moved when using **Prepare Form** will now 'snap' into one of the grid vertices.

Conclusion

In this module, we've covered the basics of placing and arranging form elements with the **Prepare Form** tool. The next module will extend this knowledge to editing form properties in a PDF document.