2.14 Formatting Forms in Acrobat

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Managing Form Fields

PDF documents designed as electronic forms must be remediated so that the features of that form are accessible to any user. To meet accessibility requirements, the format, placement and properties of all form fields must be set under specific parameters. To learn how to manipulate the properties of specific form types (such as text fields, action buttons, list boxes, and so on), make sure to review the previous modules, *Creating and Arranging Forms in Acrobat* and *Managing Acrobat Form Properties.* In this module, we will format forms for accessibility and look at special cases for making a PDF form accessible.

Verifying Form Field Properties

Form inputs must be named, given a 'tooltip' or hint, tagged, assigned alternative text and associated in the proper grouping (if necessary). First, the form properties must be verified. Later, alternative text will be added while the form elements are managed in the tag tree.

To Set the Form Name and Tooltip Properties:

1. Find and open the **Prepare Form** tool. In the document viewing window, right-click the form field and choose 'Properties'.

2. The form's 'Field Properties' window will appear. The features in this window will vary based on the type of form field. The name and tooltip, however, are always found in the 'General' tab.

3. In the 'Name' field, type a unique descriptive name for the form input. This name will be announced to a user by assistive technology.

4. In the 'Tooltip' field, type a useful description of the form input and any instructions on what should be entered there.

Note that form properties windows automatically save changes that are made to them, so there is no need to close the window to apply these changes. Because of this, properties for multiple form elements can be quickly viewed and edited in quick succession.

Creating Grouped Radio Buttons

Most form elements that need to be grouped for accessibility purposes are radio buttons. Radio buttons are most often placed into one group to represent one set of choices or answers for a question.

To Create and Group Radio Buttons:

1. Open the **Prepare Form** tool. Select the radio button option in the top **Prepare Form** toolbar.

2. Place the radio button in line with the first choice or option. A yellow option box will appear below the newly placed form field.

3. In the 'Radio Button Choice' field, type the name or statement that identifies the choice that that radio button will represent. In the 'Group Name" dropdown menu, select or create the group name to be assigned to this set of inputs.

4. Select 'Add Another Button' in the yellow info box and then place the second radio button in line with the second choice or option. Add the unique choice name and identical group name. Repeat these steps for each radio button.

Keep in mind that the unique 'Choice' input for each radio button is the name for that form field. This means the assigned group can be edited in the General tab of the 'Radio Button Properties' window. The 'Radio Button Choice' is also located in the 'Options' tab of this window.

Arranging Form Structure

PDF form elements will be structured within the tags reading order and a separate 'Fields' reading order. It is important to ensure the consistency of both for the document to be accessible regardless of what the screen reader examines.

Adjusting Tab Order for Forms

The **Prepare Form** tool has a 'Fields' section in the righthand toolbar that will accumulate and order all form fields in the document by the sequence they were placed or read into Acrobat. While the order of tags will determine the reading order and structure of a form in most cases, some screen readers have a 'Form Field' mode that will instead preset forms in this 'Fields' sequence. Form tab orders should be examined for compatibility with this mode.

To Review and Adjust the Form Tab Order:

1. While the **Prepare Form** tool is open, right-click anywhere in the document viewing window and confirm 'Show Tab Numbers' is selected. This will show the tab order number of each form field.

2. Navigate to the 'Fields' section in the righthand **Prepare Form** toolbar. The same tab order will be seen in this location.

3. To adjust the tab order of a form element, select the element in the 'Fields' section and drag it into the correct location on the list. The tab numbers in the viewing window will change to reflect the reordering. Relocate any misplaced form fields here.

If a form group is set up in the document, the group name will appear as a dropdown menu in the 'Fields' section as well. Elements of the same group can be ordered amongst themselves here.

Tagging Form Elements

Each form field should be tagged within the read sequence of the surrounding paragraph elements. Resultingly, a paragraph tag that holds the content for describing the form field will usually precede the form tag.

To Tag a Form Element:

1. In the **Tags** menu, find the 'Options' dropdown list and choose 'Reading Order'.

2. With the 'Reading Order' window and selection cursor, highlight the form element and select 'Form Field'.

3. A 'Form' tag will appear in the tag tree. Move this tag into the correct tag order where it will be following a previous paragraph tag.

4. Now that it's in place, expand the new 'Form' tag. The form field, indicated as an object reference tag, should be displayed here with a unique field name.

Preparing a Form for User Input

For a PDF form to be properly accessed and edited, previous form entries should be removed in the document. The PDF should then be saved in a special file format called 'Extended PDF' that allows any user to fill it out.

Clearing Form Contents

Unless standard inputs are part of the form design, any entries for testing or otherwise should be removed from the form fields prior to saving the document.

To Clear All Form Fields:

1. With the 'Prepare Form' tool open, select the 'More' dropdown menu that is located in the righthand toolbar.

2. Choose 'Clear Form'. All form entries will now be removed.

If necessary, any standard inputs can now be entered into the form fields and saved as default values.

Saving a PDF From

The Extended PDF file format comes with certain review and document editing functions that are normally unavailable to users without Adobe Acrobat. The features can be accessed with any free download of Adobe Reader and include form fill and signing capability.

To Save an Extended PDF File:

1. Navigate to and open the Acrobat **File** menu.

2. Select and expand 'Save Other' and move the cursor over the 'Reader Extended PDF' option (which has an expansion arrow). An additional option list will appear. Select 'Enable More Tools'.

3. An 'Enable Usage Rights' window will appear that displays the functionality being added to the document. Press 'Save Now'.

4. Save the document to the desired location in the 'Save As' window.

Though it will appear as a regular PDF file, the document will now be able to be filled out and signed. Form inputs can now be saved in this format.

Conclusion

In this module, we've covered the checklist of formatting forms in Adobe Acrobat. This marks the end of the *Making an Accessible PDF* series. In the upcoming module, we will focus on automated accessibility checks.