Desk Reference

Web Development – How to make an Interactive PDF

Create a Form Using the Form Wizard

You can convert an existing electronic document (for example, a Word, Excel, or PDF document) or scan a paper document to a PDF form, and then add interactive form fields to the form.

Note: *When you convert a document to an Acrobat form, Acrobat detects the form fields in the document. You need to examine the document carefully to verify that Acrobat detected the correct fields.*

You can create forms from an existing electronic document (for example, a Word, PDF, or Excel document) or scan a paper form into a PDF form. To create a form from scratch or from a template, you need to have Acrobat Pro or Acrobat Pro Extended for Windows or Adobe LiveCycle Designer.

1. Choose Forms > Start Form Wizard.
2. Do one of the following, and then follow the on-screen instructions.
   - To convert an existing electronic document (for example, Word or PDF) to a PDF form, select An Existing Electronic Document.
     Note: *If you don't want to use the wizard, you can open the file, and then choose Forms > Add Or Edit Fields to convert a PDF document to an Acrobat form.*
   - To scan a paper form and convert it to a PDF form, select A Paper Form.
   - (Windows) To use LiveCycle Designer to create a form from scratch or from one of the available templates, select No Existing Form.

Note: *To create an Acrobat form from scratch, first create a blank PDF by choosing File > Create PDF > From Blank Page, and then use the Start Form Wizard to convert the PDF to an Acrobat form.*

About form elements

After you determine what information you want to receive from users, you can match information types with appropriate form elements.
- For text and numeric data that the user will type, design the form to use text fields or combo boxes.
- For a single choice from a limited number of options, use radio buttons, a list box, or a combo box.

- For a limited number of options from which the user can select none, one, or more items, use check boxes, or use a list box and set the form field properties to allow multiple selections.
- For actions, such as opening a file, playing a sound or video, submitting form data, and so forth, use buttons.
- For added security, add a digital signature field that verifies the user's identity.

You can also make changes to individual form field properties, making it even easier and more foolproof for users filling in the PDF form.

A PDF form created with Acrobat can contain the following types of elements:

Barcodes

Encode the input from selected fields and display it as a visual pattern that can be interpreted by decoding software or hardware (available separately).

Buttons

Initiate a change on the user's computer, such as opening a file, playing a sound, or submitting data to a web server. These buttons can be customized with images, text, and visual changes triggered by mouse actions.
Note: *Action buttons have a different purpose than* **radio buttons***, which represent data choices made by the user.*

Check boxes

Present yes-or-no choices for individual items. If the form contains multiple check boxes, the user can typically select as many or few of these as wanted.

Combo boxes

Let the user either choose an item from a pop-up menu or type a value.

Digital signature field

Lets the user electronically sign a PDF document with a digital signature.

Document message bar

Displays automatically generated information about the PDF form and can display action buttons and other options. The document message bar informs Reader users about their usage rights for the form. It also specifies if a form is certified or has signature fields and allows users to highlight fields. If the form doesn't have a submit button, a Submit Form button is added to the document message bar to allow the users to submit the form.
Note: *If form recipients are using older versions of Acrobat or Reader, the document message bar may not be visible or may contain different information.*

List boxes

Display a list of options the user can select.
Note: *You can set a form field property that enables the user to Shift-click to select multiple items on the list.*

Radio buttons

Present a group of choices from which the user can select only one item. All radio buttons with the same name work together as a group.

Text fields

Let the user type text, such as name, address, or phone number.

Create Form Fields

In Acrobat, you create a form field by choosing one of the form tools. For each field type, you can set a variety of options through the form field Properties dialog box.

Note: *In Windows, you can use LiveCycle Designer to edit forms that were created in Acrobat. However, Acrobat can't edit form fields that have been opened and saved in LiveCycle Designer.*

Create a new form field

1. After you convert your document to a PDF form, choose Forms > Add or Edit Fields.
2. Do one of the following:
   - Click Add New Field, and then select a tool.
   - Choose Forms > Form Tools, and then select a form tool.
   - Right-click the page and select a tool.

   Your cursor becomes a crosshair.
3. On the page, click where you want to add the field to create a field with the default size. To create a field using a custom size, drag a rectangle to define the size of the field.
4. In the Field Name box, type the name of the field and specify if you want the field to be a required field. Choose a name that is relevant and descriptive to make organizing and collecting the data easier.
5. To display the Properties dialog box and modify any other field properties, click Show All Properties.
   Note: *If you have selected the Keep Tool Selected option in the forms toolbar (visible when you select Add New Field > Show Tools On Toolbar), the Field Name box doesn't appear after adding a field. Each time you click the page, a new field is added to the form. To exit this mode, press the Esc key or click the Select Object Tool button ⬉. To modify the properties of the field, double-click the field.*
6. To test your form, click the Preview button 🖅. Previewing a form allows you to view the form the same way the form recipients will and gives you a chance to verify the form. If you are previewing a form, you can click the Edit Layout button 📝 to go back to the edit mode.

Select multiple form fields

Selecting multiple form fields is the first step for several tasks, such as creating copies, aligning form fields, and adjusting the spacing between form fields.

❖ If necessary, choose Forms > Add or Edit Fields, and then do any of the following:
   - To select all form fields of all types, choose Edit > Select All.
   - To select a range of form fields, click the first form field in the range, and then Shift-click the last form field. All form fields between the two form fields are selected.
   - To select individual form fields in different parts of the PDF page, Ctrl-click each form field.

- To select all form fields in an area of the page, use the Select Object tool to drag a selection marquee around the area.
- To deselect an individual form field, Ctrl-click that field.

The field that is highlighted in dark blue and displays the border handles is the **anchor**. When you select multiple form fields by clicking, the last field selected is the anchor. When you use a marquee, the form field that was created first is the anchor. If you Ctrl-click to deselect the anchor, the form field located in the upper left of the selection becomes the new anchor form field.