Acrobat IX

101 Forms eTips

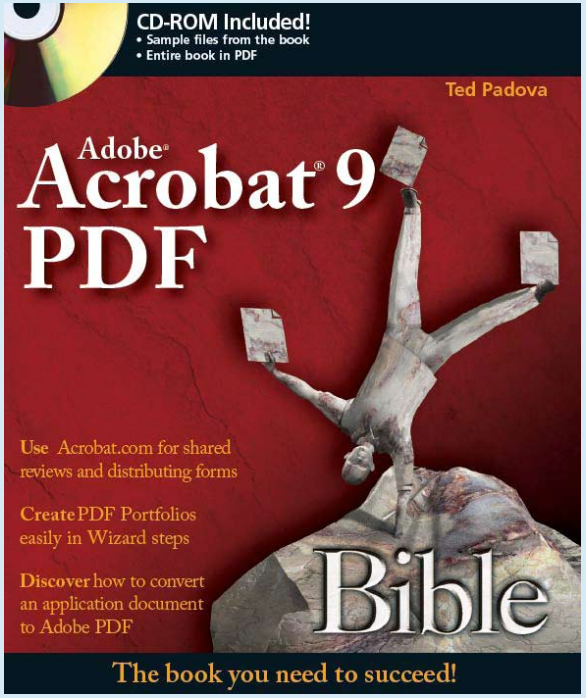
ted padova

http://www/west.net/~ted
http://www.acrobatusers.com
http://www.acrobatusers.com/blogs/tedpadova

Acrobat 9 PDF Bible

Coming mid 2008 View TOC

Over 1000 pages on using all the new features in Acrobat 9



PDF Forms Using Acrobat & LiveCycle Designer

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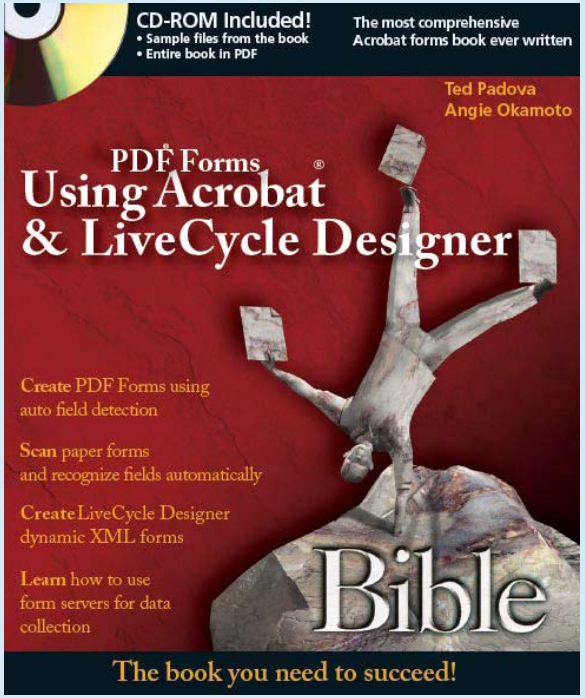
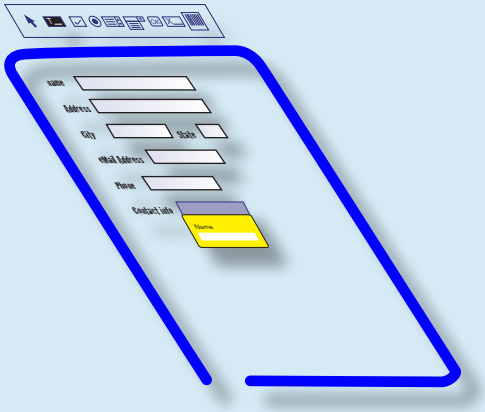
Over 1000 pages on AcroForms and LiveCycle Designer XML Forms



Using Form Edit mode



All of the tasks in this section do not apply to Adobe Reader

New in Acrobat IX
Form Edit Mode

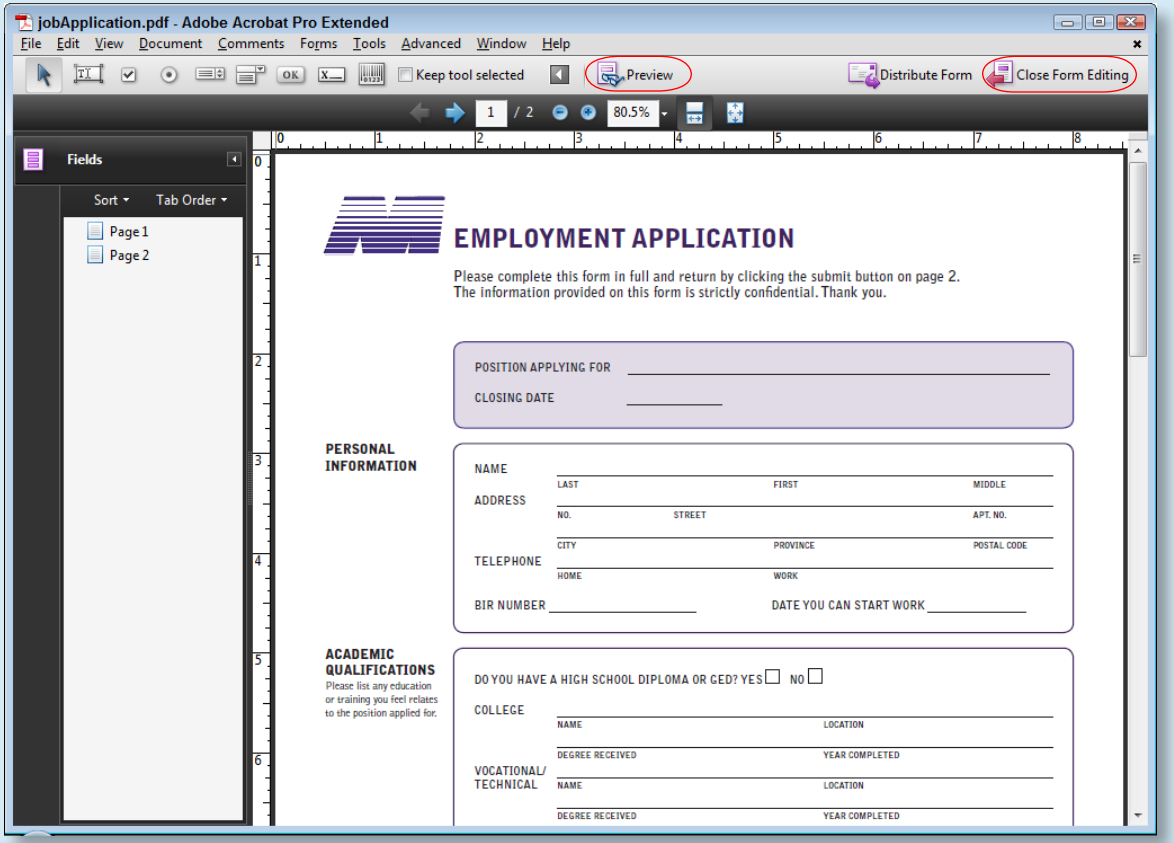
Form Edit mode

Choose Forms | Add or Edit Fields and you enter Form Edit mode. All the form tools are found in this mode only.

The Fields panel is also located in this mode and not available in normal Viewer mode.

To exit Form Edit mode and return to Viewer mode, click the Close Form Editing button in the top right corner of the Form Edit mode interface. To test fields, you can stay in Form Edit mode and click the Preview button where you can add data to field objects to test them.

To edit fields on a page in Viewer mode, open the Advanced Editing toolbar and click the Select Object tool. Double click a field to open the field Properties window. A Button tool also appears on the Advanced Editing toolbar where you can add Button fields also in normal Viewer mode.



Menu Commands Available by Mode

Menu commands vary according to the mode you choose to work on a form.
Use this table as a reference for knowing what menu commands are available according to mode.

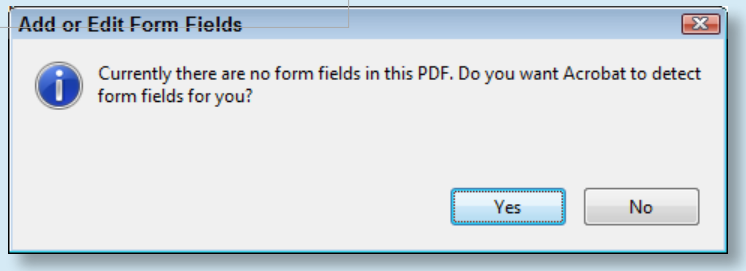
Commands According to Mode		
Menu Commands	Viewer Mode	Form Edit Mode
Start Forms Wizard	☺	☹
Add or Edit Fields	☺	☹
Close Form Editing	☹	☺
Distribute Form	☺	☺
Compile Returned Forms	☺	☹
Form Tools	*	☺
Edit Fields	☹	☺
Show Field Properties	**	☺
Manage Form Data (Submenu commands)	☺	☹
Track Forms	☺	☺
Highlight Fields	☺	☺
Clear Form	☺	☺
QuickBooks (Submenu commands)	☺	☹
Advanced Menu (Enable Features in Adobe Reader)	☺	☹
Advanced Menu (JavaScript commands)	☺	☺
Advanced Menu (Page Templates)	☺	☹

* The Button tool is available on the Advanced Editing toolbar in Viewer mode.
** You can open the Properties window via a context menu or by double clicking a field with the Select Object tool

Using Run Form Field Recognition

In Acrobat 8 you had the Forms | Run Form Field Recognition command. Acrobat 9 has the same detect fields options as you had in Acrobat 8, but there is no commend for RFFR. Acrobat automatically detects fields on a form when you choose Forms | Add or Edit Fields. Choosing this command opens your form in Form Edit mode.

Open a form in Acrobat 9 and choose Forms | Add or Edit Fields. The Add or Edit Fields dialog box opens.



Click Yes and Acrobat automatically detects fields on your form.

ted's tip

If one field exists on a form and you open the form in Form Edit mode, no fields are detected. Select any existing fields on a form and choose Edit | Cut. Reopen the form in Form Edit mode and you are prompted to have Acrobat detect fields. Click Yes and you can paste the fields cut prior to reopening in Form Edit mode

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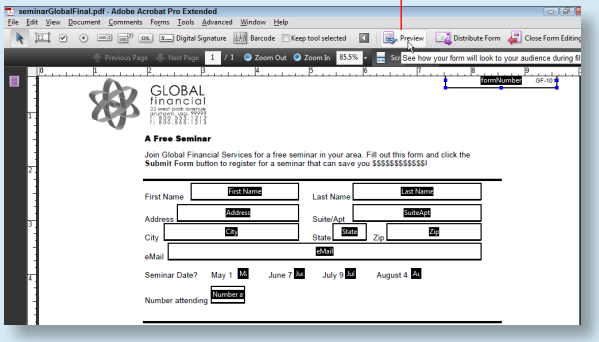
Filling in Fields in Form Edit Mode

You edit forms in Form Edit mode in Acrobat 9. When adding fields you may need to check calculation formulas, fill in data to form barcodes, or preview a form in other ways.

While in Form Edit mode, do the following:

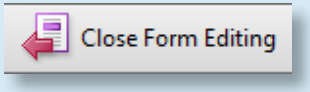
- Click Preview in the Form Edit mode Toolbar



While in the Preview mode you can fill in forms and check your scripts. To exit the Preview mode click the Edit Layout button.

ted's tip

To exit Form Edit mode and return to normal Viewer mode, click the Close Form Editing button.

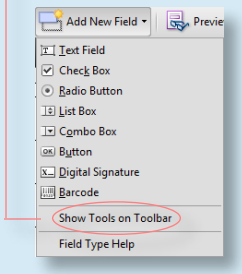


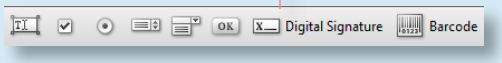
Using Form Tools

If you opened the Tools menu in normal Viewer mode searching for the Forms toolbar, stop now. STOP

There is no Forms toolbar in Acrobat 9. All form tools are only available in Form Edit mode EXCEPT the Button tool that appears in the Advanced Editing toolbar.

Open Form Edit mode and open the Add New Field pull-down menu on the Edit Form mode toolbar. If you choose *Show Tools on Toolbar* the tools appear in a row on the toolbar.





To access the Text Field tool press the F key. This is the only Form tool you can access with a keyboard shortcut.

When you press the F key in normal Viewer mode the Button tool is selected.

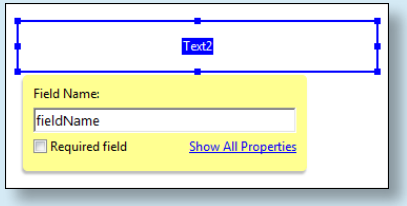
4 Adding a Field to a Form

Open the Add New Field pull-down menu in Form Edit mode and choose a form tool. The cursor is loaded with the selected tool. Do one of the following:

- Click the mouse button to drop the field on your form.

OR

- Click and drag to shape the field rectangle.



- To name a new field, type a name in the mini Properties window. To show all field Properties, click Show All Properties.

5 Adding a Field in Viewer Mode

To add new fields in Viewer mode you must have created at least one field for every field type you want to add to a form in normal Viewer mode. After creating a field(s) in Form Edit mode, do the following:

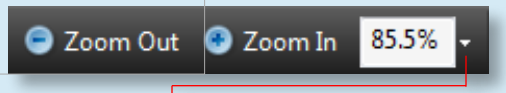
- Click the Select Object tool in the Advanced Editing toolbar.

- Press CTRL/Option and click + drag a field. The field is duplicated on the form.

Zooming Views in Form Edit Mode

You have several options for zooming the magnification of your form in Form Edit mode (the same commands and tools are also available in Viewer mode). To zoom in and out:

- Click the Zoom In and Zoom Out tools in the Form Edit Toolbar.
- Type a zoom value in the Zoom Percentage text box.



- Open the pull-down menu and choose a preset zoom magnification.
- Press CTRL/Command + 0 (zero) to Fit in Window.
- Press CTRL/Command + 1 for Actual Size.
- Press CTRL/Command + 2 for Fit Width.
- Press CTRL/Command + 3 for Fit Visible.
- Press CTRL/Command - (minus) to zoom out.
- Press CTRL/Command + to zoom in.

ted's tip

There is no Zoom tool in the Form Edit mode Toolbar. For quick access to the Zoom tool, press CTRL/Command + Spacebar to zoom in and CTRL/Command+Alt/Option + Spacebar to zoom out. While the keys are pressed down, click and drag a marquee in the area you want to zoom in.

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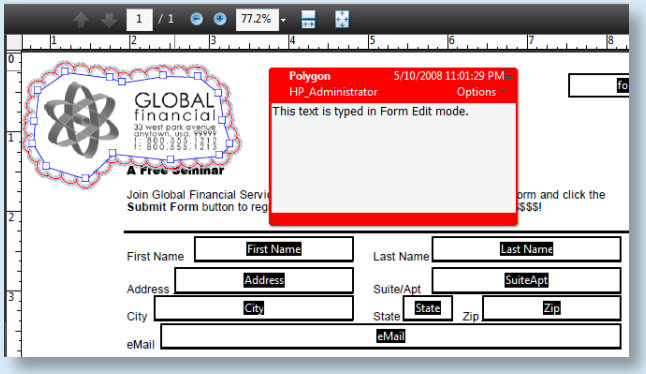
Comments in Form Edit Mode

If you're looking for the Comment & Markup toolbar in Form Edit mode, stop now: STOP

You won't find the Comment & Markup tools or any other toolbar available while in Form Edit mode.

If you want a comment to appear in Form Edit mode you can add a comment in Viewer mode, copy the comment or markup and paste in Form Edit mode. Once pasted, you have access to the comment Properties and reshaping markups.



ted's tip

Double clicking a comment in Form Edit mode opens the comment's Properties window. If you want to open a note pop-up window, open the window in Viewer mode, then copy the comment. When you paste in Form Edit mode, the note window opens and you can type text in the window.

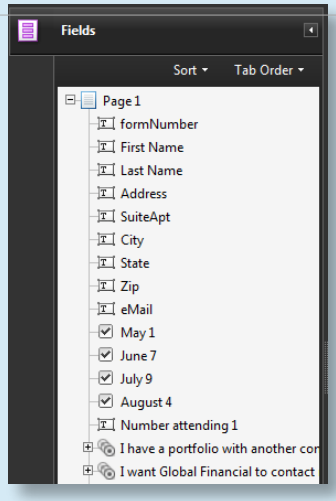
Using Panels in Form Edit Mode

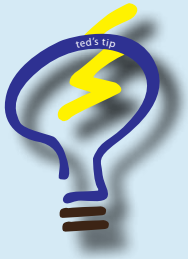
If you're looking for Navigation panels in Form Edit mode, stop now. STOP

The only Navigation panel you'll find in Form Edit mode is the Fields panel.

If you're looking for the Fields panel in Viewer mode, stop now. STOP

The Fields panel is only available in Form Edit mode.



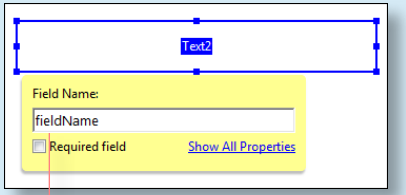


Fields can be sorted in two sort orders. From the Sort pull-down menu choose Alphabetic Order to sort fields alphabetically. Choose Tab Order to display the fields in the panel in Tab Order

Renaming Fields

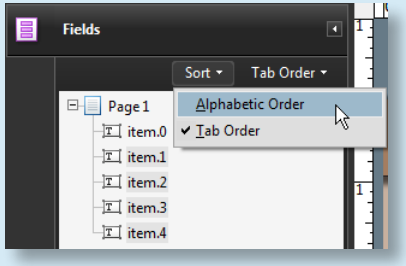
Acrobat 9 provides several ways for you to rename fields. When you want to rename a field or multiple fields, do one of the following:

- Click a field with the Select Object tool in either Viewer mode or Form Edit mode and open a context menu. From the menu options choose Rename Field. The mini Properties window opens where you can edit the field name.

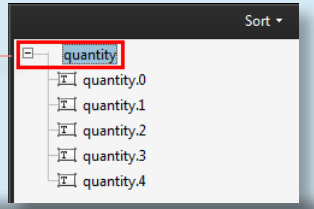


- Double click a field with the Select Object tool in either mode and the General tab opens in the Properties window. Type a new name in the Name text box.
- In Form Edit mode, open the Fields panel. Double click a field to edit a field name.

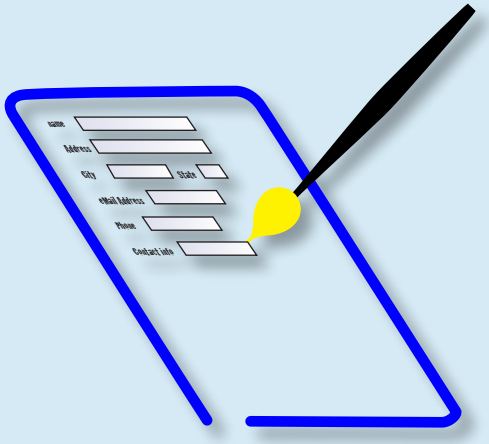
To change hierarchical names do the following:



- In the fields panel open the Sort menu and choose Alphabetic.
- Double click the parent name above the children for a given group of names.
- Type a new name for the parent name.



editing forms



All pages in this section relate to Acrobat only. None of the tasks can be completed in Adobe Reader.

Editing Images on a Form

If you have a legacy form and don't have the original application authoring document you can edit images in a program like Photoshop or Photoshop Elements.

To edit an image do the following:

- Click an image with the TouchUp Object tool.
- Press the Option/Alt key and double click the image.

  By default, the image opens in Adobe Photoshop.
- Edit the image and click Save (not Save As).

  Your edits are dynamically changed in the PDF document.

Adding Document Properties

Some authoring applications offer you options for adding Document Property information such as Title, Subject, Author, and Keywords.

If you redesign a form and create several PDFs during the process, you're best off adding Document Property information in the authoring application so you don't have to keep editing the properties on each new file in Acrobat.

- In a program like Adobe InDesign, choose File | File Info.
- Fill in the fields for Document Title, Author, Description, and Keywords.
- Export to PDF

  The Document Properties are retained. This information is particularly important when you want to search for forms on your hard drive or server.

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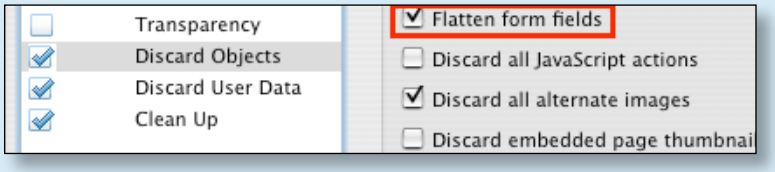
Flattening Fields

Field objects like destinations and links add overhead to your files and increase file size. If you have a form that no longer requires editing the field data and you want to display the form while retaining the data you can flatten the fields.

Follow these steps to retain data while eliminating field objects:

- Choose Advanced | PDF Optimizer.
- Click Discard Objects in the left pane in the PDF Optimizer.



- Check *Flatten form fields* in the right pane.
- Click OK.
- Name the file.
- Click Save.

Be certain to provide a new name when prompted by the PDF Optimizer before you save the file. Keep the original file just in case you need to go back and make some edits in the fields.

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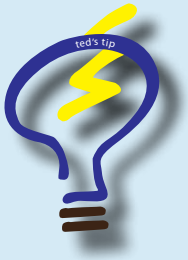
Replacing Pages

The command I use most when creating forms and slide presentations is the Document | Replace Pages command. I always find myself tweaking the page design after I've added fields on a form.

Because Acrobat doesn't provide you a very good editing environment in terms of editing text and images, the ideal method for changing documents is to return to the authoring program, make your changes and export to PDF.



I find that when I edit a design and export to PDF I name the new file with a number preceding the file name —something like *0.myFormDesign.pdf*. When it comes time to replace the page, there's no question about what file I need to use for the page replacement.

If you added a number of fields to an original design, then you'll want to change the background data while retaining the field objects. To to do so:

- Modify a form in the original authoring program.
- Export to PDF.
- Open the file containing field objects.
- Choose Document | Replace Pages.
- Select the new design and click OK.

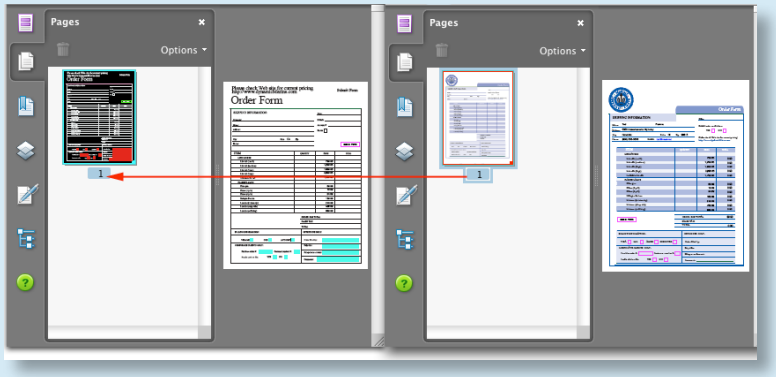
Replacing Pages in Tiled Views

If you have a number of pages to replace in a document or you want a more visual approach to replacing pages, you can drag and drop pages between documents.

Here's how to do it:

- Open two documents in Acrobat 9.0. One file is your original design and the other file is the new design.
- Choose Window | Tile | Vertically.
- Open the Pages panel on both documents.
- Press CTRL/Alt (Win*) or Command + Option (Mac*) and click + drag the thumbnail of the new design to the top of the page thumbnail in the old design. The field objects remain intact.
- Move the cursor to the page number below the thumbnail and wait until the page appears reversed in color (black).
- Release the mouse button and the page is replaced.

* Modifier keys are new in Acrobat 9.0.



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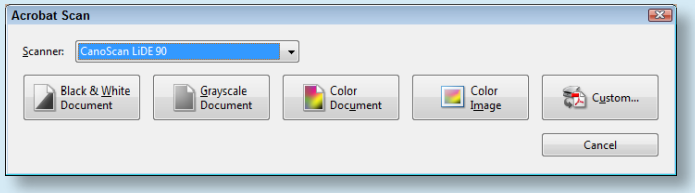
Scanning Paper Forms

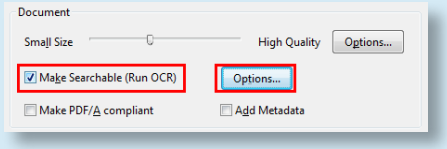
Many improvements have been added to Acrobat 9 for scanning paper forms.

To convert a paper form to a fillable PDF form, do the following:

- Choose Forms | Start Form Wizard.
- Click the *A paper form* radio button.
- If using a WIA compliant scanner driver (Windows only) click a preset from the Acrobat Scan dialog box. To use custom settings, click Custom.



- In the Custom Scan dialog box click Make Searchable (Run OCR).



- Click the Options button and choose *Searchable Image* for the PDF Output Style and click OK.
- Click Scan and the file is scanned, OCR is run, and the form opens in Form Edit mode where Acrobat detects fields on the form.

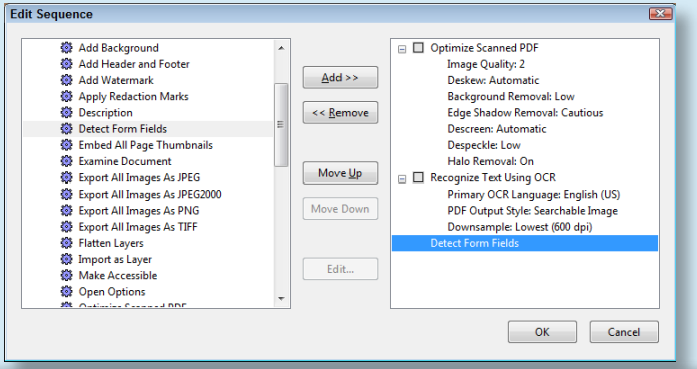
  Note: for WIA compliant drivers, you can choose Document | Scan to PDF | and choose a preset. Presets can be edited for scanning attributes. Each time you scan and choose a preset, the same attributes you last established as defaults are used.

Automating Detecting Fields

You can scan a number of forms and save the forms as image files, then later use a Batch Sequence to recognize text and use Run Form Field Recognition.

Here's how to do it:

- Choose Advanced | Document Processing | Batch Processing.
- Click *New Sequence* and type a name for the sequence.
- Click *Select Commands* in the Edit Batch Sequence dialog.
- Click *Optimize Scanned PDF* and click Add.
- Double click Optimize Scanned PDF in the right window.
- Adjust any settings you want for optimizing the scans.
- Click *Recognize Text Using OCR* in the left window and click Add.
- Click *Detect Fields* in the left window and click Add.
- Click OK through the dialogs and you return to the Batch Sequences dialog box. When you run the sequence scans are optimized, OCR is run, and Acrobat detects fields.



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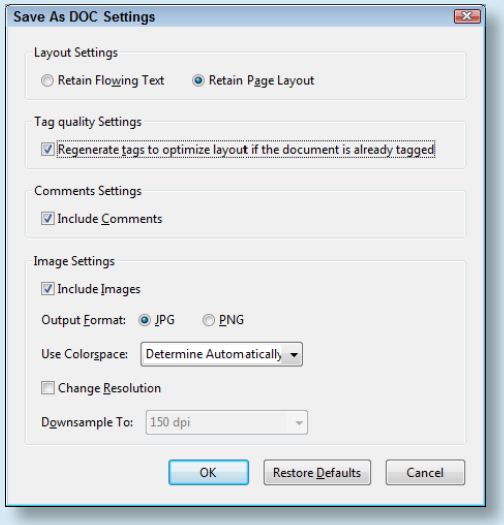
Exporting PDF Content

A number improvements have been added to Acrobat 9 for exporting content back to authoring application documents. When you need to edit a form and don't have the original application document available, try exporting from a PDF to a file format that you can use to edit in an original authoring application.

To export a PDF form to Microsoft Word format where you can edit the form design, do the following:

- Open a form in Acrobat.
- Choose File | Export | Word Document.
- Click the Settings button.
- The Save as Doc Settings dialog box opens.
- Choose the settings options you want for your export. If you want to retain the layout, click *Retain Page Layout*. When your file opens in MS Word, the layout is preserved and the text is all editable.
- Click OK and click Save and your file can be opened in MS Word.

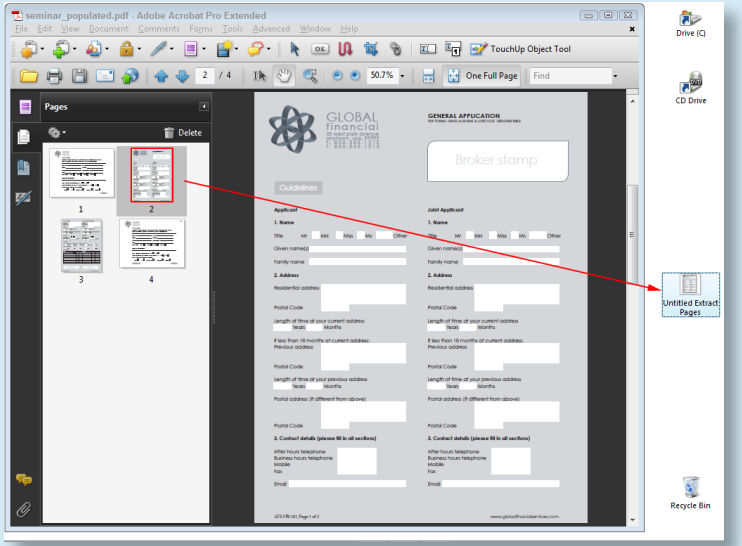


Exporting PDF Pages

If you have a form among several pages in a PDF file and you want to export certain pages from the file, you can use the Document | Extract Pages command. When the extracted pages open in Acrobat you can save the page(es) as a new file.

Another way to handle extracting pages is to use a drag and drop method. To extract pages via drag and drop, do the following:

- Open a multi-page document in Acrobat.
- Click the Pages panel icon to open the Pages panel.
- Minimize the Acrobat window so you can see part of the Desktop in the background or an open folder.
- Select a page(es) in the Pages panel and drag to the Desktop (or a folder). The pages are extracted as a new file.

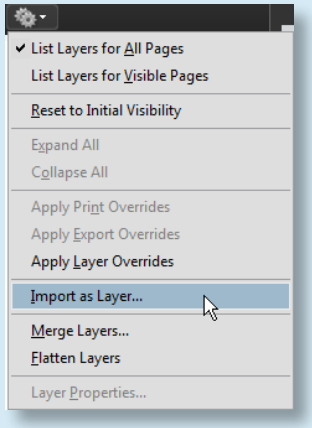


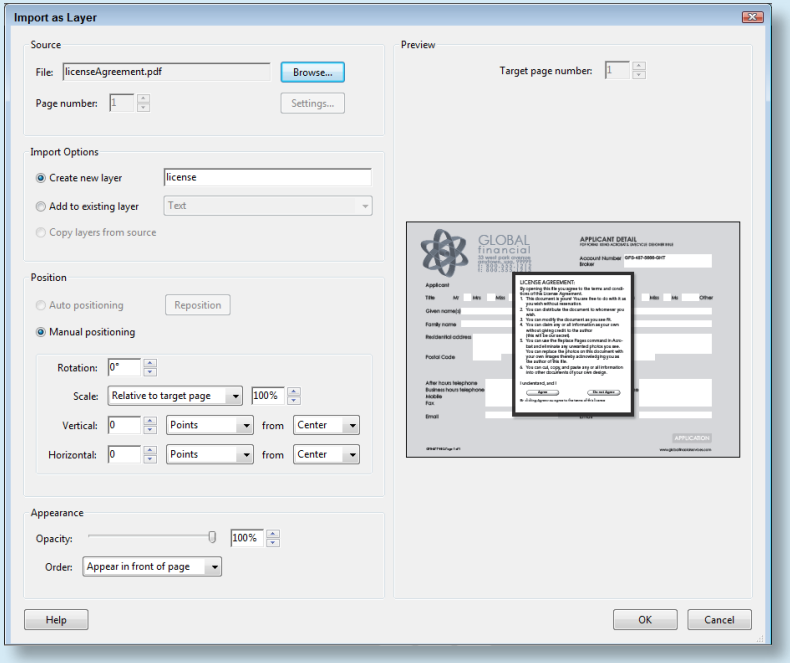
Add a New Layer to a Form

In Acrobat 9 Professional you can add new Adobe PDF Layers to a PDF file. Adding layers to PDFs where no layers exist or new layers to a layered file is handled in one of two ways. Use the Preflight tool from the Print Production toolbar or use the Layers panel.

To add a new layer to a file using the Layers panel, do the following:

- Open a form in Acrobat.
- Open the Layers panel in the Navigation pane.
- Open the Options pull-down menu (represented by an icon in the top left of the Layers panel) and choose Import as Layer.
- The Import as Layer dialog box opens (shown opposite page).
- In the Import as Layer dialog box choose a file to import by clicking the Browse button. Type a name for the new layer in the text box adjacent to the text: *Crate new layer*.
- If you want to move the content on the layer around your form, click the thumbnail preview and drag to position where you like.
- Click OK and the new layer is added to your file.





When layers are added to a PDF document you can show and hide layers with button actions and JavaScripts.

You might use a new layer to add a license agreement to a form, a Flash video, a layer where instructions for filling in a form are provided or many other uses.

Check out my article in Layers Magazine (http://www.layersmagazine.com/) for more information on creating new layers in Acrobat 9.

working with pdf portfolios

PDF Portfolios can be created only in Acrobat. All the pages in this part relate to Acrobat only.

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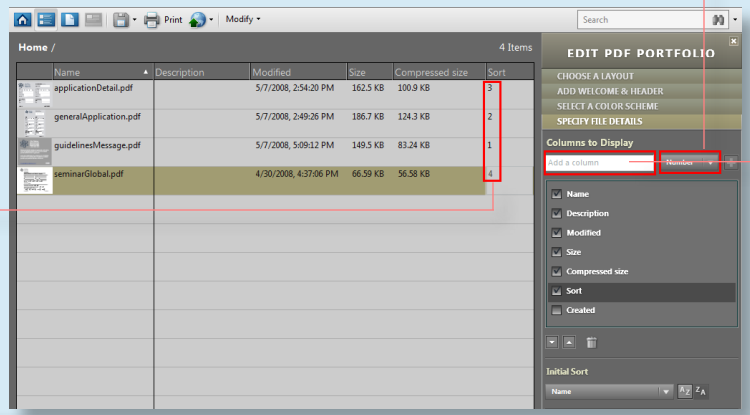
Adding Forms to a PDF Portfolio

In Acrobat 8 we had PDF Packages. In Acrobat 9 Adobe has introduced PDF Portfolios. PDF Portfolios can be helpful when you need pages of instructions along with forms. Rather than add instruction pages to a form, you can keep the form simple and add other documents to a PDF Portfolio.

To create a PDF Portfolio, do the following:

- Choose File | Create PDF Portfolio.
- Click and drag the files you want to add to a PDF Portfolio to the PDF Portfolio interface Document pane or click the Add Files button and select files to add.
- PDF Portfolios are organized in an alpha order according to file name. To change the order you can add a custom sort field in the Details panel. *Click Specify File Details* in the right panel.
- Type a new sort item in the *Add a column* text box.
- Choose *Number* from the pull-down menu.
- Double click cells in the new column and type respective numbers for the sort order.



Enabling Forms a PDF Portfolio

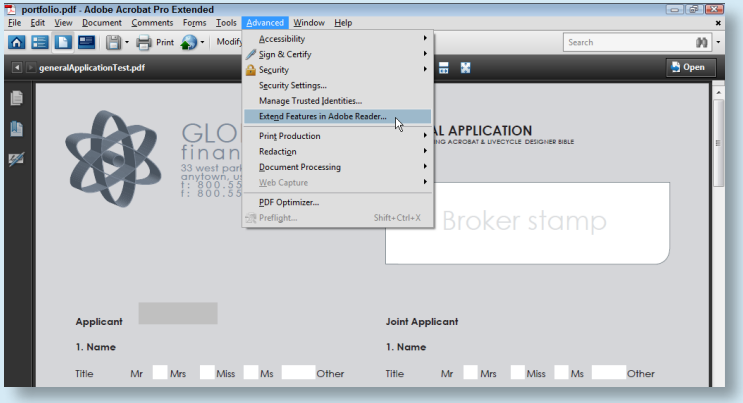
When you open a PDF Portfolio you're in a Home view where you can scroll the documents while viewing thumbnail images of the files. In this view you have limited access to menu commands.

To access menu commands such as enabling a file for Adobe Reader Usage Rights (now also available in Acrobat Standard), double click a file in the Home view. The file remains in the PDF Portfolio interface but now you have access to almost all the menu commands.

To enable a file for Adobe Reader usage rights in a preview view in a PDF Portfolio, do the following:

- Choose Advanced | Extend Features in Adobe Reader.
- Click OK in the Enable Usage Rights in Adobe Reader dialog box.

When extending rights in Acrobat, you are prompted to save the file. When extending rights on a file from within a PDF Portfolio, a Save As dialog box doesn't open. Your file is enabled and you perform a save when you save the Portfolio (File | Save Portfolio).



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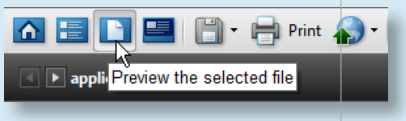
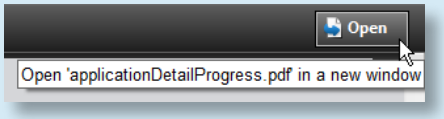
Editing Forms in a PDF Portfolio

When you view files in a PDF Portfolio the default view is the Home view. If you click a thumbnail image of a file in a Portfolio and click the Preview the selected file tool in the PDF Portfolio toolbar or double click a thumbnail and the file opens in Preview mode.

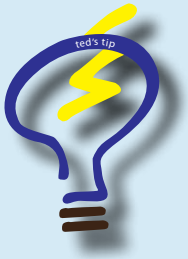


Preview mode still doesn't provide you the ability to open the form in Form Edit mode or access several Forms menu commands. To gain access to full editing options on a PDF form, you need to open the file in a new window.

Click the Open button on the far right of the PDF Portfolio toolbar and the form opens in a new window.



Once in a new window you can choose Forms | Add or Edit Fields to enter Form Edit mode.



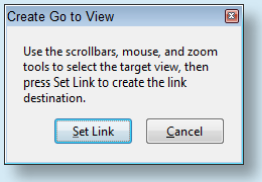
Closing windows can be a little confusing when working with PDF Portfolios. When you open a new window by clicking the Open button, you close the new window like you do any Acrobat file (click the Close button or press CTRL/Command + W). Any edits you made are still intact when closing the window. When you click the Close button or press CTRL/Command + W in the other PDF Portfolio views, you close the portfolio. If you haven't saved an edit, you are now prompted to save your file.

Adding Navigation Links to PDF Portfolios

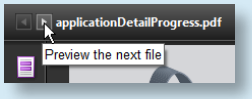
If you have a form in a portfolio combined with a few files used for instructions and want your recipients to navigate the files in a linear view like when viewing a single PDF document without using the PDF Portfolio interface, you can do so by adding buttons or links for document navigation.

To add navigation links to files in a PDF Portfolio, do the following:

- Open a file in a PDF Portfolio in Preview mode (See opposite page).
- Choose Tools | Advanced Editing | Link Tool (or press CTRL/Command + L). Note that you don't have access to any other Advanced Editing tool except the Link tool —even the Button tool is grayed out.
- Create a link on the last page in a document. When you release the mouse button the Create Link dialog box opens.
- Set the visibility options and click the *Custom link* radio button. Click Next to open the Link Properties window.
- Click the Actions tab and choose *Go to a page view* and click Add. The Create Go to View dialog box opens.



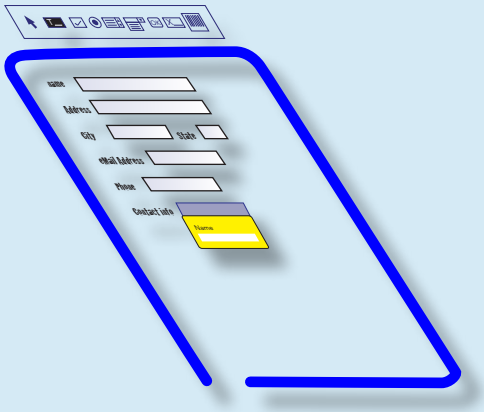
- Click the *Preview the next file* button in the PDF Portfolio toolbar to open the next file.



- When you locate your target file, click Set Link in the Create Go to Link dialog box and the link is created.

When a form filler wants to navigate your PDF Portfolio the user doesn't need to return to the Home view.

Working with Fields



You cannot add or format fields in Adobe Reader however, the results of the field edits described in this section can be used on forms by Adobe Reader users.

Note that Acrobat Standard 9.0, Acrobat Professional, and Acrobat Professional Extended all support authoring PDF forms.

You must enter Form Edit mode in order to add fields to a document. Choose Forms | Add or Edit Fields to enter Form Edit mode.

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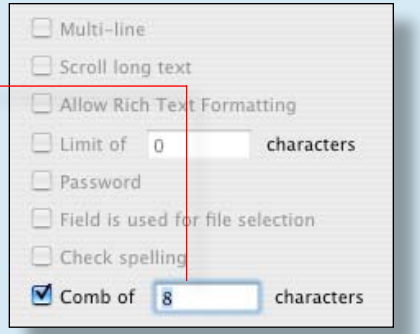
Creating Comb Fields

Comb fields are often found on government forms where a user is expected to fill in separate boxes (or divisions separated by vertical lines) as a single field object.

Comb fields properties are applied to text fields in the Text Field Properties dialog box.

To create a comb field, do the following:

- Create a text field in Form Edit mode.
- Open the Text Field Properties dialog box (double click the field with either the Select Object tool; open a context menu on a selected field and choose Properties; or click Properties in the mini Properties window to open the Text Field Properties dialog box).
- Click Options.
- Remove the check marks for Scroll Long Text and Check Spelling.
- Click the *Comb of* check box.
- Type a value in the characters text box for the number of characters you want to use in the comb field.



Sample comb field

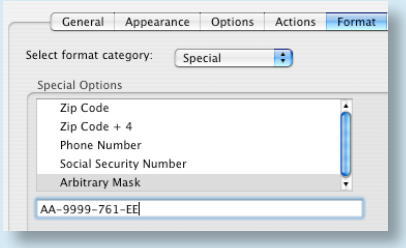
Creating Arbitrary Masks

An arbitrary mask might be used for a section number, an account number, an identification code or similar type of field. The mask can contain alpha and/or numeric characters.

Quite often, you might use an arbitrary mask for an area on a form that is used for *Official Use Only*. If the user needs to fill in a field with an arbitrary mask, it's helpful to add an instruction or dialog box informing the user exactly how to fill in the field.

To create a field with an arbitrary mask do the following:

- Create a text field in Form Edit mode.
- Open the Text Field Properties dialog box.
- Click the Format tab.
- Choose Special from the Select format category drop down menu.
- Scroll the Special Options list and choose Arbitrary Mask.
- Type a code in the field box below the Special Options list.



Sample Arbitrary Mask field

AA-NNNN

Note: wildcard alpha characters are A, wildcard numeric characters are 9. Any other character retains the character in the code.

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Duplicating Fields on a Page

You can duplicate fields on a page in either Form Edit mode or Viewer mode. For a quick method for duplicating fields, do the following:

- Create one or more fields on a page.
- Select the field(s) with the Select Object tool.
- Press the CTRL/ Option key and drag the field(s) to duplicate.

Adding Fields in Viewer Mode

If you prefer to stay in Viewer mode to create PDF forms, you can create a template file having all eight field types. To add field objects in Viewer mode do the following:

- Open a template file containing all eight field types in Viewer mode and click the Select Object tool.
- Choose Edit | Select All.
- Choose Edit | Copy.
- Choose Edit | Paste.
- Drag the fields to an unobstructed area on your form.

  When you want to add a field, press CTRL/Option and drag to position. Click the field with the Select Object tool and choose *Rename Field* from a context menu. Type a new name and continue adding fields by duplicating and changing field names.

Duplicating Buttons Across Multiple Pages

A common use for a Button with a button face is navigating pages. If your files are displayed in Full Screen Mode, you may want to add navigational buttons to help the end user move around your document.

To create a navigational button and duplicate it across multiple pages, do the following:

- Add a button to the *second page* of a multi-page document.
- Click the Action tab and add an action to move to the next page. You can use either an *Execute Menu Item* action or a *JavaScript* action to move to the next page.
- Choose *Execute a Menu Item* from the Select Action drop down menu and click Add.
- Click View | Go To | Next Page in the Menu Item dialog box.
- Repeat the same steps for a button to navigate to the previous page. Click View | Go To | Previous Page in the Menu Item dialog box.
- Click OK and Close the Button Field Properties dialog box.
- Select both buttons with the Select Object tool.
- Open a context menu on the button and choose Duplicate.
- Enter the Page Range in the Duplicate Field dialog box (3 to [last page number]). Click OK. The buttons are duplicated across the pages specified in the Duplicate Field dialog box.

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Adding Button Faces

A button face is an icon or an image appearing within a Button field. To add a button face to a Button field, do the following:

- Create a button field (in Forms Edit Mode or in Viewer mode using the Button tool on the Advanced Editing toolbar).
- Open the Button Field Properties dialog box.
- Click the Options tab.
- Choose Icon only from the Layout drop down menu.
- Click Choose icon.
- Click Browse in the Select Icon dialog box. Select a file to use for a button face.

  Note that from the Files of type (Windows) or Show (Macintosh) drop down menu you can choose from a number of different file formats to import for your button face. All files compatible with the Create PDF | From File menu command can be used for a button face.

- Click Select and click OK.

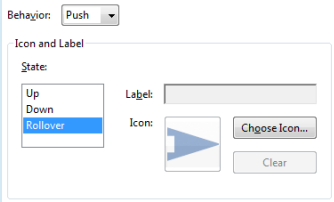
When adding buttons, choose from the options in the Behavior drop down menu. If you choose None, you can eliminate the focus rectangle when the button is clicked.

Adding Rollovers to Button Faces

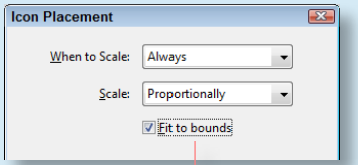
Rollovers for button faces are the same kind of rollover effects you see on web pages. When the cursor is placed over a button, the icon appearance for the button changes. You can use the same effect in Acrobat for button faces.

To create a rollover for button faces, do the following:

- Follow steps on the opposite page to create a button face.
- Choose Push for the Behavior



- Click Rollover in the State list.
- Click Choose Icon.
- Import another icon for the rollover image.
- To proportionally fill the button field object with the icon image, click the Advanced button in the Options tab in the Button Field Properties.



- The Icon Placement dialog box opens.
- Check Fit Bounds and click OK.

Creating buttons with transparency is quite simple. For vector objects use Adobe Illustrator. For raster images, add an image to a transparent layer in Photoshop and save the file as a PDF. All transparency is preserved with both Illustrator and Photoshop layered files.

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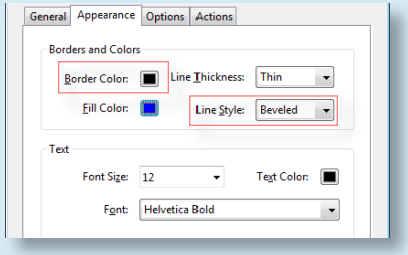
Formatting Field Appearances

Field appearances for border color, fill color, fonts, and font sizes are controlled in a field's Properties window in the Appearances tab.

You can select one or several fields in either Form Edit mode or Viewer mode and change field appearances. There are some issues you should know when attempting to change appearances. These include:

- To remove a line style (for example a Beveled style) first select a Border Color and choose Solid, then choose None from the popup color swatch.
- Fonts can be changed on multiple fields of different types *except* Radio Buttons and Check Boxes.
- Setting the font size to *Auto* automatically adjusts font size to the height of the field box. To use a standard size for all fields on a form, choose a fixed point size.



ted's tip

You can change default appearances for different field types by first making your appearance choices in the Appearance tab, then open a context menu on a field having the new appearance. From the menu commands choose *Use Current Properties as new Defaults*. The new defaults remain in effect until you change them again.

Show/Hiding Fields

You can use pop-up button faces to display messages on a form. Rather than use precious space on a form for adding instructions, use a button to display instructions to help form fillers complete your forms.

To add a button face for a help message, do the following:

- Create a button field (in Forms Edit Mode or in Viewer mode using the Button tool on the Advanced Editing toolbar).
- Add a button face to display a message (see Tip #30).
- Add a button to show the button face. Use the Select Action | Show/hide a field action. When you click Add the Show/Hide Field dialog box opens.
- Scroll the list of fields and locate the button you want to show. Click the Show radio button and click OK.
- Create a second button to hide the field. In the Select Action pull-down menu choose Show/hide a field and click Add.
- Scroll the Show/Hide Field dialog box and click Hide.
- Click OK.

Sample button

ted's tip

You can nest actions in a field's Actions tab. If you want to show both the button face and the button that executes a show or hide action, add one action then return and add a second action to show/hide a second button.

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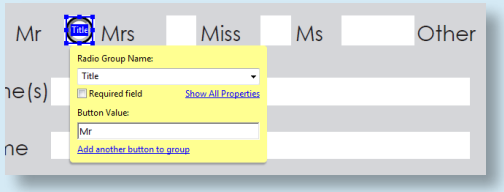
Creating Mutually Exclusive Radio Buttons

One continuing problem forms authors have experienced is with creating mutually exclusive radio buttons and check boxes. A mutually exclusive field is a radio button or check box among a group of fields designed for the form filler to make a single choice. As one radio button/ check box is clicked, all other radio buttons/check boxes are cleared of marks.

Acrobat 9 has introduced some new features to help form authors create mutually exclusive radio buttons. To use the new features, do the following:

- Open a form in Form Edit mode.
- Click the Radio Button tool in the Form Edit mode toolbar or choose Radio Button from the Add New Field drop down menu.
- Move the cursor to the area where you want the radio button to appear and click to drop the field on the form.
- Type a name for the field and type an export value.
- Click *Add another button to group* and the cursor is loaded with the Radio Button tool.



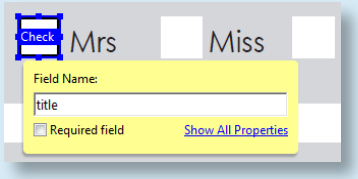
- Click to drop the second radio button. By default the name appears the same as the first button you created. Type a new Button Value and click *Add another button to group* to add additional buttons.

Creating Mutually Exclusive Check Boxes

Mutually exclusive check box fields are created for the same reasons that you create mutually exclusive radio button fields. Only one choice can be made in a group of fields having the same name but different export values.

To create mutually exclusive check box fields, do the following:

- Select the Check Box tool from the same location as you select the Radio Button tool.
- Click to drop a field on a form. Note that the Check Box options do not provide a choice for setting the export value (Button Value when creating radio buttons).



- Click Show all Properties to open the Properties window.
- Click Options and type a name for the Export Value.
- Leave the Properties window open with the Option tab in view and with the Select Object tool, press CTRL/Option + click drag the first check box to a new location.
- Type a new name for the Export Value. Continue adding fields having the same name but with different export values.

ted's tip

Radio buttons and check boxes are identical in Acrobat with two exceptions, and don't let anyone tell you differently. Radio buttons can have a circle border and when you mark a radio button by clicking it, you cannot remove the mark by clicking the same button again. Check boxes don't have circle appearances and when you mark a check box you can remove the check mark by clicking the same field again.

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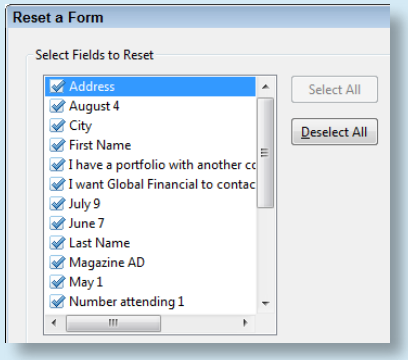
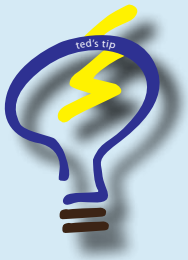
Adding a Reset Button

To add a button to reset the form fields, do the following:

- Create a Button field in Form Edit mode.
- Click Properties after dropping the button field.
- Click the Actions tab in the Button Field Properties window.
- Choose *Reset a form* in the Select Action menu.
- Click Add.
- Check the fields you want to reset in the Reset a Form dialog box.
- Click OK.





A much better way to reset a form is to use a JavaScript. You have a much easier way to identify fields to clear data if you name the fields properly. See the JavaScript section for the script to show/hide fields.

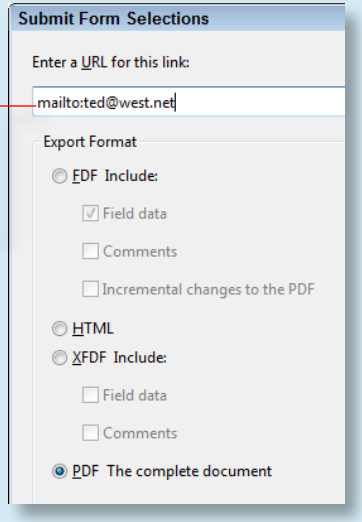
Submitting Forms to eMail Addresses

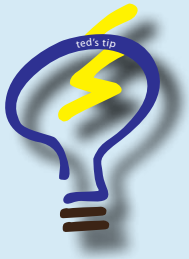
To create a Submit Form button, do the following:

- Add a button on a form.
- Open the Button Field Properties dialog box and click the Actions tab.
- Choose Submit a form from the Select Action drop down menu.
- Click Add.
- Type an eMail address in the top field in the Submit Form Selections dialog box. The syntax for the line of type is:

  `mailto:<your email address>`

- Check an export format and click OK.





If you want the PDF returned to you by Adobe Reader users, be certain to enable the form with *Adobe Reader usage rights* before sending your form to Reader users.

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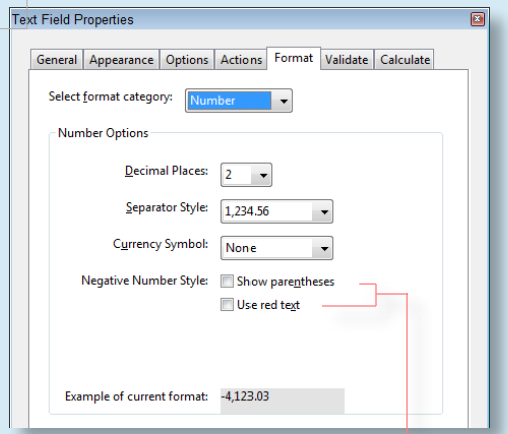
Formatting Numbers

If you add calculations to fields you must format the fields as numbers. Before writing JavaScripts, using Simplified Field Notation, or using the formula presets, be certain to format all the fields containing numeric values to a number format.

To format text fields as number containers do the following:

- Create a text field in Form Edit mode.
- Open the Text Field Properties dialog box (double click the field with the Select Object tool or open a context menu on a selected field and choose Properties to open the Text Field Properties dialog box).
- Click the Format tab.
- Choose *Number* from the Select format category menu.
- Select options for the number attributes.



If you want negative values reported in red text and/or in parentheses, check the boxes that apply in the Format tab below the Number format choices.

Placing Multiple Fields

One thing to remember when creating tables in Acrobat is to avoid using hierarchical names when using the *Place Multiple Fields* command. In most cases, you'll want Acrobat to rename the first row fields with parent/child names when it automatically populates a table.

To create a table, do the following.

- Choose Forms | Add or Edit Fields to enter Forms Edit mode.
- Add text fields across a row or column and format the fields —especially the number fields.
- Select the fields with the Select Object tool and open a context menu.
- Choose Place Multiple Fields.
- Enter the number of rows and columns you want for the table in the Create Multiple Copies of Fields dialog box and click OK.

Item	Price	Qty	Amount
Total			

To learn how to straighten up rows and columns, see Tip # 40

When calculating the rows (or columns) count the total number of rows/columns you need. Inasmuch as Acrobat is telling you it's copying selected fields, it's actually creating a new set of fields. The table above would require typing 4 for the number of rows (excluding the Total row).

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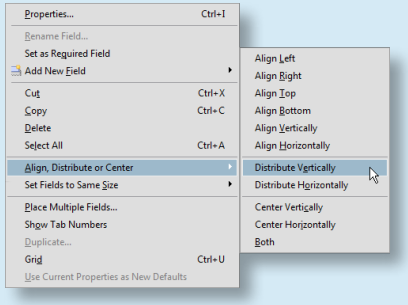
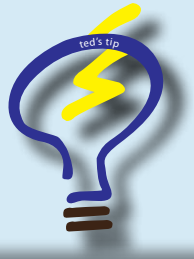
Managing Fields

When you create tables as shown in Tip #39, the fields may not fall within the table area of your design. With a few short steps using context menus you can align fields to any table design.

- After populating a table as described in Tip #39, you may need to straighten up the fields so they fit within the table cells.
- Select the last row (or column) of fields and move them to position in the last row (or column) of your design.
- Drag through the first column (or row) to select only one column (or row) of fields.
- Open a context menu and choose Align, Distribute or Center | Distribute Vertically (or Horizontally).
- Select the next row (or column) and perform the same steps.



Additional context menu commands appearing when you open the menu on selected fields include aligning fields, sizing fields, and centering fields.



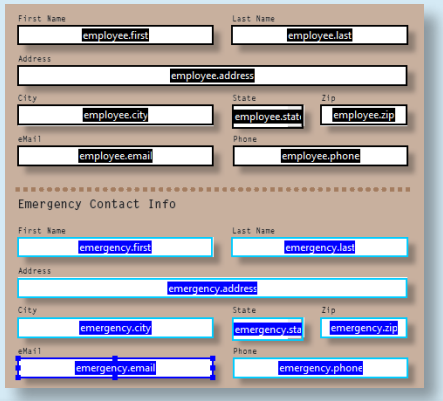
Note: If you try to select all fields in a table and distribute them together (instead of one column at a time) Acrobat will cascade the fields. You must use the Distribute command only on fields selected in one row or one column.

Copying/Pasting Blocks of Fields

If you have a group of Fields for identifying information for two separate blocks of fields and you want to copy/paste the fields on the same form, do the following:

- Create one block of fields and add all the appearances and formats you want for the individual fields. Be certain to use hierarchical names for the fields such as employee.first, employee.last, employee.address, etc.
- Save the form and in the Fields panel choose Sort | Alphabetically in Form Edit mode.
- Edit the parent name (in this example *employee*) and change it to a parent name you'll use in another block such as *emergency* for emergency contact data.

  You currently have the saved file with the parent name *employee* and on the clipboard you have the edited parent name *emergency*.
- Choose File | Revert to revert to the saved file. (Note: You must be in Viewer Mode to use Revert).
- Choose Edit | Paste and drag the fields to position. The pasted fields have different field names and can accept unique data.



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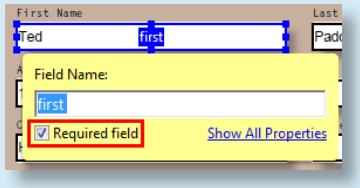
Marking Fields *Required*

If you want to be certain a form filler completes all fields on a form prior to submitting the form, you can mark the fields *Required*. When a form filler clicks a submit button the submit action won't be invoked if all required fields are not filled-in.

In Acrobat 9 you have several ways to mark fields as *Required*.

- When you add a field using a Form tool in Form Edit mode the mini Properties window displays a check box for *Required*. Click the check box and the field is marked as *Required*.



- In Either Viewer mode or Form Edit mode, select a field and open a context menu. From the menu choices select *Set as Required Field*. The field is marked as *Required* without opening a Properties window.
- In Either Viewer mode or Form Edit mode, select a field and open a context menu. From the menu choices select Rename Field. The same window opens as when creating a new field where you can mark a field as *Required*.

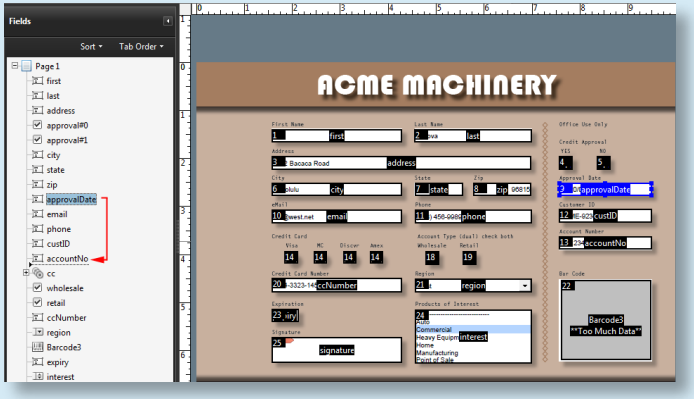
ted's tip

STOP Don't open a field's Properties window. You won't find a check box for *Required* in the General tab in the Properties window.

Setting Tab Orders

Acrobat 9 provides some new exciting ways to set tab orders. To explore some of the options you have for setting tab orders , do the following:

- To show the tab order on a form, open a populated form in Form Edit mode. Open the Tab Order pull-down menu in the Fields panel (in Form Edit mode) and choose Show Tab Numbers. Each field is marked with a number signifying the order of the tabs.
- To order fields in a tab order, open the Tab Order drop down menu in the Fields panel and choose one of the listed orders.
- To manually set tab orders, open the Sort pull-down menu in the Fields panel and choose Tab Order. Click and drag fields up or down to reorder them.



ted's tip

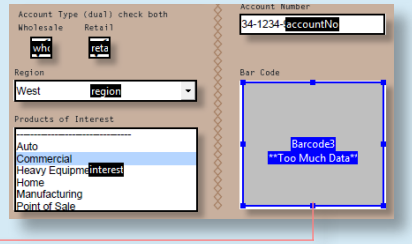
Note: You can first sort a tab order by making a selection in the Tab Order pull-down menu, such as *Order Tabs by Row*, then drag fields to reorder them while maintaining the original row order for fields you don't move in the Fields panel.

Adding Barcode Fields

You'll want to observe a few precautions when creating barcode fields.

- Populate a form with all the fields you expect to see on the final form.
- Save the form.
- Test the form by filling in all the fields with the most amount of data any given field can accept.
- While the fields are populated with data, add a Barcode field (click the Barcode tool in Form Edit mode and draw a rectangle on your form).

  Barcodes need to know how much data are to be added to the code to estimate the size of the barcode, hence your reason for populating the form with data. If you see an error reported in the barcode field, you need to remove some fields from the barcode calculation.



- Click the Value tab in the Barcode Properties dialog box.
- Click pick to open the Field Selection dialog box.
- Uncheck boxes for the fields that you don't need added to the barcode.

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