

Create an Electronic Form with Acrobat

Generate a PDF of your original document

Prepare your document

- Remove anything that will be replaced by a PDF form field: checkboxes, option buttons, outlined text boxes, multiple text lines.
- Clean up sloppy formatting to reduce the PDF size: use tabs to align elements, not spaces.
- Remove unneeded elements: page headers and footers, complex designs, etc.

Distill your form into a PDF

- Set Acrobat Distiller to use Screen job options for web-optimized PDFs. You can tinker with individual job option settings if you know what you're doing.
- Three main ways to create the PDF:
 1. Print to a PostScript file and distill it. Harder to set up, but worth it. Smallest file size (23,318 bytes in my sample).
 2. Print to the Acrobat Distiller printer. As simple as printing. Medium file size (26,630 bytes in my sample).
 3. Print to the Acrobat PDFWriter printer. Discontinued, since it isn't that good. Large file size (39,397 bytes in my sample).

Add form fields to the PDF

Use the Form tool to draw form fields in Acrobat

- You can try to use a grid to line up and size the fields. Look for "grid" in Acrobat help.
- Perfect one form field, then copy and paste it.
- Drag the field to where it belongs.
- Arrow keys move a field a tiny bit at a time.
- Drag one of the field's handles to resize it.
- Shift-arrow keys resize a field a tiny bit at a time.
- Hold down the Ctrl key while dragging around a group of fields to select them. Or you can shift-click individual form fields to select a group.

Set the properties for the form fields

- Name the field and select the type.
- Plenty of field types available: button, check box, combo box, list box, radio button, signature, text.
- What you type in the Description box appears when the user hovers over the field.
- Use the Appearance tab on the Field Properties dialog box to control what the field looks like: borders, font and size, whether the field is visible and/or printable.
- Use the Options tab to set up the options that are specific to the field's type.

- The Actions, Format, Validate, and Calculate tabs have advanced properties if you're ambitious.
- To create mutually-exclusive option buttons, use the Radio Button type and give them all the same name.
- To add online instructions, use a read-only text field that is visible but doesn't print.

Test, secure, and shrink the PDF form

Click the Hand tool to test the form

- Any data you enter into a form will be saved with the form. Either manually delete your test data, or change one of the field's properties to flush out its test data.
- Check the tab order from field to field. Look for "tabbing order" in Acrobat help to see how to change it.

Set a password to prevent changes

1. Select File/Document Security... from the Acrobat menu.
2. In the Document Security dialog box that appears, choose Acrobat Standard Security from the Security Options.
3. Check the Password Required to Change Permissions and Passwords checkbox and enter a Master Password.
4. Use the 40-bit encryption level to have your PDF work with older versions (3 and 4) of the Acrobat Reader.
5. Check the No Changing the Document checkbox to prevent users with a full version of Acrobat from changing the PDF. Everyone will still be able to fill in the form fields and print the PDF.
6. Save and close the PDF to activate the security. Open it back up and verify that you can't change it.

Shrink the file size

Every time you save changes in Adobe products, it just adds the changes to the end of the file, so the file size keeps getting larger and larger. After **ALL** of your changes are done, select File/Save As... from the Acrobat menu and save it with the same file name to flush out all the changes and shrink the file size.