

Creating files from a document you created.

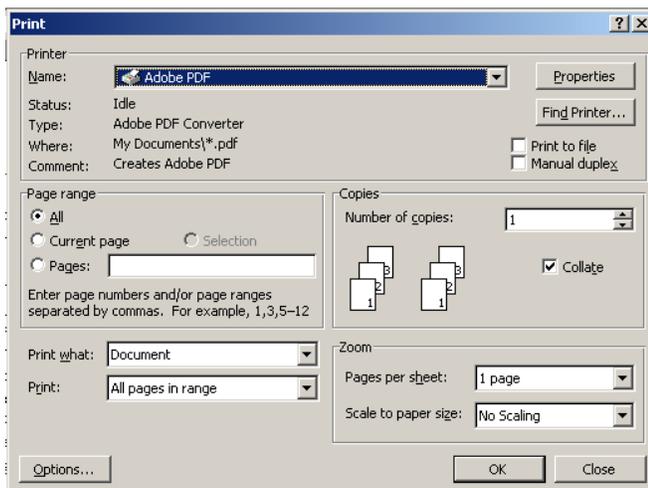
Acrobat really comes in two parts. Acrobat itself which is an application, and Acrobat Distiller, which looks to the user like a printer. It's a handy to think of Distiller as a printer, except what you get out of it is a PDF file rather than a print. There is also the free Acrobat Reader, which cannot create PDF files.

There used to be a version called PDFWriter that was distributed with some applications. Think of it as a crappy printer: It will create PDF files, but with less accurate reproduction and less compression.

Windows

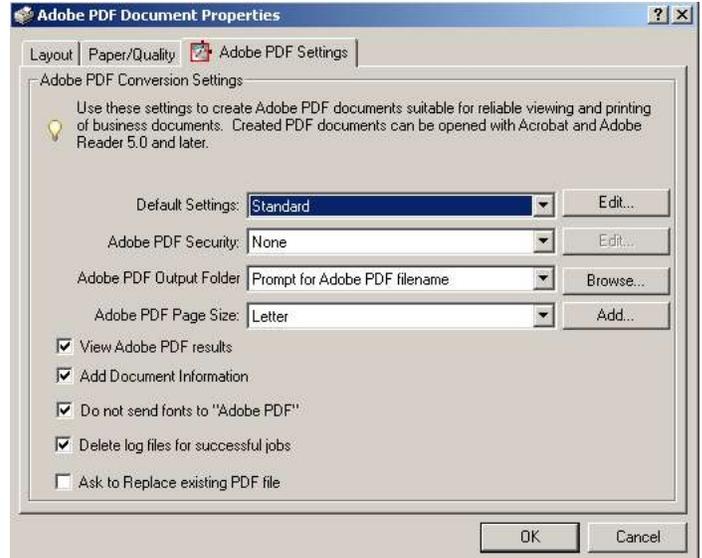
In the application you created the document with, select Print. This dialogue will vary considerably from application to application.

Adobe PDF should be on the list of printers available.



Clicking on Properties will give you options available for Adobe PDF. This is normally where you would change page size, resolution, or select a different tray for special papers.

There are three panels: layout, paper/quality and Adobe PDF Settings. Layout and paper/quality are common to most printers and aren't often used in creating an Acrobat file.



There are several variations of image compression, font inclusion and several other variables within PDF files.

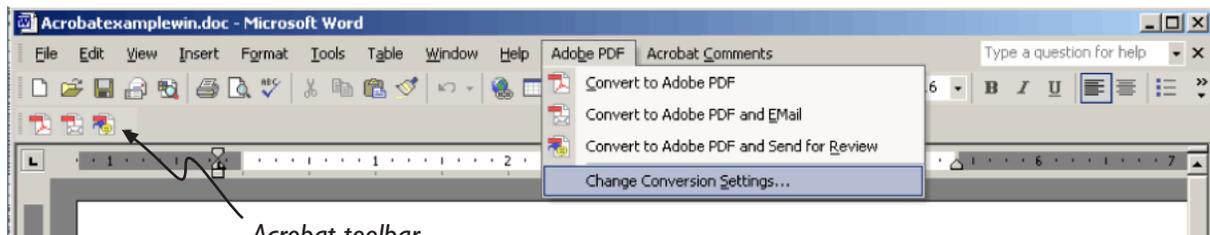
There is a menu at the top of the Adobe PDF panel to choose Default Settings. These are presets of how the resolution of images in the document are converted in the PDF document, whether fonts are included, and how compatibility with older versions of Acrobat are selected.

There are six presets, Smallest File Size (Screen in previous versions), Standard (ebook in previous versions), High Quality (Print in previous versions) and Press Quality (Press in previous versions) as well as two new settings with special graphics exchange features PDFX 1a and PDFX3.

Creating PDF files from Microsoft Office

Using the directions in this handout, PDF files can be created from any application. In Microsoft Office applications, if you have Acrobat installed, there will be a tool bar and a menu item that will modify your

Acrobat settings, create PDF documents and interact with Outlook by sending PDF's out for review and comment without going through the print dialogue. The resulting PDF files are exactly the same as printing with Adobe PDF.



Acrobat toolbar



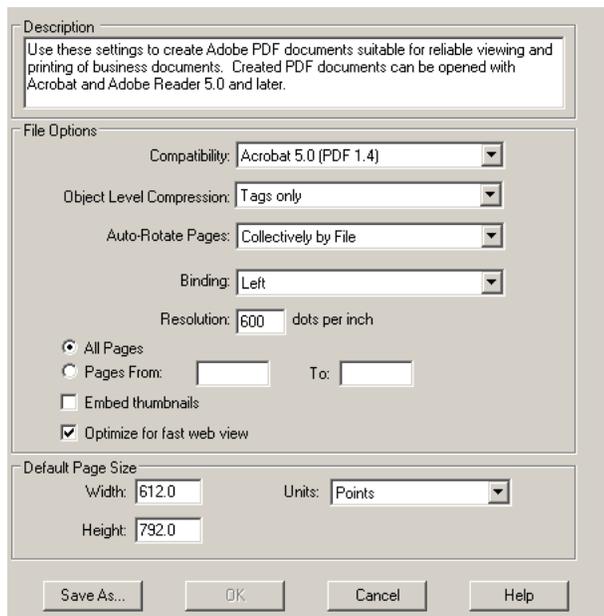
When you select a setting, a brief description is displayed above the window.

You can edit the settings and save new presets for special applications you might have.

In order to understand what characteristic the presets affect, look at what settings you can change.

Click on **Edit**.

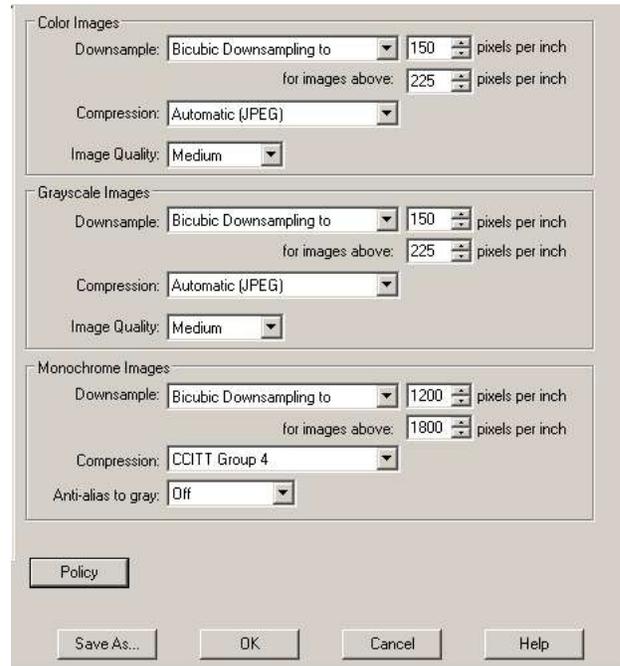
There are six panels: **General**, **Images**, **Fonts**, **Color**, **Advanced** and **Standards**.



Under **General**, the most commonly changed setting is **Compatibility**. The default value for all the presets in Version 7 are version 5 compatibility. Even though version 4 was released in early 1999, and version 5 in early 2001, potential viewers may not have upgraded their version of Acrobat reader, so for *maximum* compatibility choose 3.0. Documents saved as 4.0 or higher compatibility will not show color when viewed in 3.0. Version 3.0 compatible will be slightly larger and there are limitations to the size of the document and some issues related to shading styles. In general, the higher numbered version will create smaller file sizes. It may be advisable to use a higher version and advise potential viewers which version of the reader is required.

There are other settings under General where you can choose page range if your applications settings don't allow this and set the default page size for creating PDF files.

The **Images** panel is where you choose how bitmapped images are changed in the document to reduce file size.



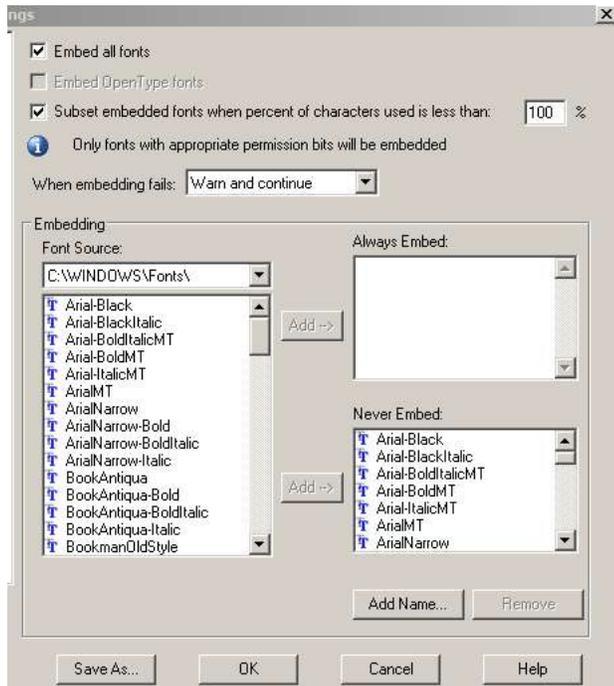
Color, Grayscale and Monochrome images are set separately. To reduce download times, the size of files with bitmapped images can be reduced by reducing the resolution of the image. Reducing the size of files also reduces the sharpness of an image. The goal is to keep only as much data as is necessary. You can also apply various file compression schemes which reduce the size of the file. At the most extreme compression settings (minimum) it can have an effect on the sharpness of the image.

Most of the time it is desirable to reduce the size of the file but in some cases, such as preparing files for commercial printing, it's more important to have the necessary resolution than to reduce file size.

If your original images in the document are lower than the resolution specified, no change will occur.

Under the Monochrome images, if the Anti-alias to gray setting is used, jagged edges will look smoother on screen, but may make small detail and thin lines blurry.

The **Fonts** panel includes an **Embed All Fonts** check box that determines whether to include the fonts or not in a document.



Including fonts increases the size of the file. If the reader has the fonts installed on their computer, Acrobat will use those fonts, therefore it's unnecessary to include them.

If fonts are not included and they are not installed on the users computer, Acrobat will substitute it's own fonts. The formatting of the page remains remarkably consistent, but the appearance of the font may be different. After you've created a document without including the fonts, you can uncheck the **Use local fonts** command under the **View** menu to see what it looks like with the substitution fonts.

If it's important that the page look exactly the same or if using specialized cartography, mathematical or music fonts, the fonts can be embedded in the document.

You can choose to **Subset embedded font**, where only those characters that are used in the document are included, which reduces file size but then the document can't be edited with the Text Touch-up tool in the full version of Acrobat.

There is a list of fonts which are nearly universal or so closely match the Acrobat substitution fonts that are on a list which Acrobat will never embed. You can choose to add fonts to a list which Acrobat will always embed or never embed irrespective of the whether the Embed all fonts box has been checked.

If you don't want to embed fonts at all in order to create the smallest possible files, *uncheck both* **Embed all fonts**, and **Subset embedded fonts**.

The **Color** panel adjusts settings that are probably only appropriate for demanding color applications when you are preparing files for a commercial press.

The **Advanced** and **PDF/X** panels have settings that primarily concern processing of PostScript files when using Distiller as a standalone application and exchanging graphics data.

Settings characteristics

All the presets in version 7 are set for Acrobat 5.0 compatibility. In order to have the widest possible compatibility (at the cost of some file size) you may wish to modify these presets to Acrobat 4.0 compatibility.

The **Smallest files size** settings preset is used for documents that will only be viewed on a computer screen. It is set for Acrobat 5.0 compatibility, reduces any image over 150 dpi to 100 dpi and subsets the fonts.

The **Standard** setting preset is used when the document may be printed and has slight compromises between sharpness of images and file size. It is set for Acrobat 5.0 compatibility, reduces any image over 225 dpi to 150 dpi and includes fonts.

The **Highest Quality** setting is for documents which need to be printed with quality on a desktop printer. It is set for Acrobat 5.0 compatibility, reduces any image over 450 dpi to 300 dpi and includes all fonts.

The **Press** setting is for the highest quality commercial printing. It is set for Acrobat 5.0 compatibility, reduces any image over 450 dpi to 300 dpi but uses maximum quality compression, includes fonts, and doesn't change color from the settings set in the application.

When you change a setting, Acrobat prompts you to name and save it, after which it shows up in the list of presets.

Adobe PDF Page Size

The last menu on the print dialogu allows you to select page size if you are using something other than letter size paper. If you are creating a PDF file from a tabloid size document and this window is set to letter; it will only reproduce the top left letter sized area of the document, just as if you were printing the tabloid document to letter size paper. There may be application specific settings in the print dialogue that will scale the document to whatever paper size is selected, if, for example, you wanted to make handouts of a poster.

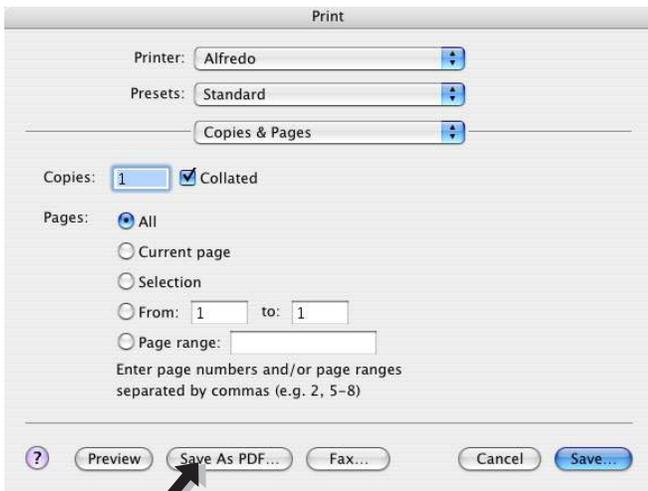
Click OK to create the PDF file

After choosing the settings appropriate for your use, click **OK** to return to the print dialogue, set any application specific settings and click **OK** again. A standard file dialogue box will appear with the original file name of the document (except with a .pdf extension), prompting you for the location to save the new Acrobat PDF document.

The checkbox for **View Acrobat PDF** on the Adobe PDF Settings tab in the Properties dialogue box is checked by default. so Acrobat should launch automatically and display the file.

Macintosh.

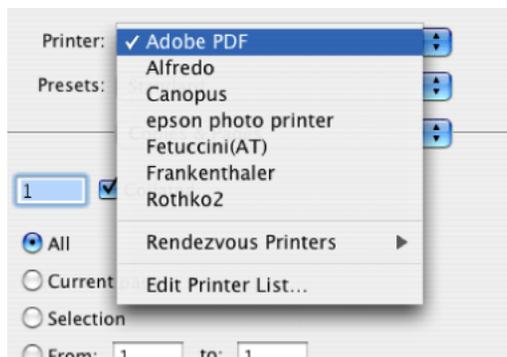
The ability to create PDF documents is built into the print dialogue box of the Macintosh OSX operating system whether you have Acrobat installed or not. It creates slightly larger files than using the Adobe PDF printer and there is no way to change the characteristics of the resulting PDF file. Fonts are subsetted. In some advanced graphics programs which include the ability to export a file as PDF, this function may be disabled (Adobe Illustrator and InDesign), or simply won't work (Macromedia Freehand).



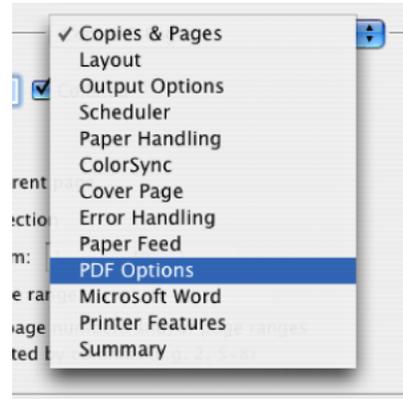
The options available in the print dialogue will vary with different applications, but the Save as PDF button will always be at the bottom

Printing to Adobe PDF

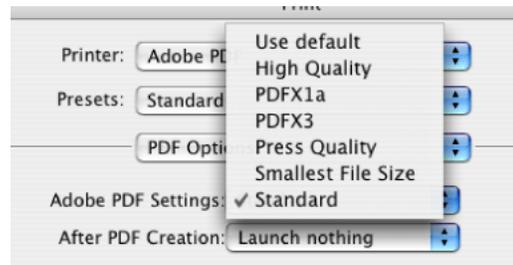
If you have Acrobat Standard or Professional installed, Adobe PDF will be included on the list of printers.



When the Adobe PDF printer is selected, the menu of printer characteristics will include PDF Options.



A menu of the preset options for your PDF file (see *Setting Characteristics* on the previous page) will appear as well as an **After PDF Creation** menu to choose whether to launch Acrobat or Acrobat reader to check the file.



You cannot edit the settings from the print dialogue box.

The settings can be edited and new options placed on this list by launching the application **Acrobat Distiller** (which should be located in the same folder as Acrobat Professional or Standard) and choose edit PDF settings from the Settings menu. (see the previous two pages.)

If you select Acrobat or Acrobat Reader from the **After PDF Creation** menu in the PDF Options dialogue, that application will launch and display your file after you click print. The default is to do nothing.

Finish by saving the file

Click the **Print** button. A standard file dialogue box will appear with the file name of the original document with a .pdf extension, prompting you for the location to save the new Acrobat PDF document.

Creating PDF's from paper documents.

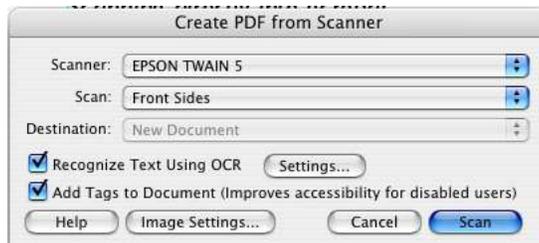
Scanning directly into Acrobat

You can scan pages directly into Acrobat if your scanner came with a Photoshop plug-in (most do and it's normally setup when you install the software that came with your scanner)

Acrobat 7 has new features that make scanned paper documents searchable, copyable and at least partially accessible. Some of these features don't always work perfectly, with complex page layouts, but they will generally give you the smallest file size with at least a partially accessible document.

This process will be more accurate with a clean copy that is placed in the scanner straight.

From the **File** menu select **Create PDF** or from the Tasks toolbar select **Create PDF**, and then **From Scanner**



If you only have one scanner it will appear on the **Device** menu. Some digital cameras and camcorders may appear to Acrobat as scanners so you may have to pull down the menu to find your scanner.

The **Scan** menu determines if the resulting PDF document will be single or double sided. If your original is double sided, you will simply be prompted to turn it over and whether you want it placed in the PDF as the front or back of a page.

Under **Destination**, you can choose to open a new document or add the scanned page to a currently open document.

The next two check boxes determine if you want Acrobat to perform **Optical Character Recognition**, which converts the page into searchable, copyable, accessible text. Unless the page is only an image and has no text, leave both of these checked.

There are some **Settings** for OCR



The first chooses the language the text is in. The second, **PDF Output Style**, gives you a choice between **Searchable image**, which leaves the actual scanned image and adds the text in a layer behind the image, or **Formatted text and graphics**, which deletes the image, leaving only the text layer.

Formatted text and graphics can potentially reduce the file size of the resulting PDF, but can negatively affect the appearance and formatting of the page and often doesn't actually create a smaller file. *Leave this setting at Searchable Image.*

The last menu **Downsample Images** determines what the final resolution of the image is. In order to reduce file size, select **Medium (150dpi)**. If file size is not an issue, leave this at Low (300dpi) for an image that prints sharper.

Click OK to return to the Create PDF from Scanner dialogue

Click OK to return To the Create PDF from Scanner dialogue.

When you click scan, the interface for your scanner will be launched and you can select the type of image, size and resolution of the image.

With Acrobat's adaptive image compression, it doesn't make much difference in the file size whether you choose black and white, grey scale or color. An image scanned as color will probably look better on screen and print better.

Set the **Resolution** to **300 dpi**. Lower resolution can negatively impact the accuracy of the Optical Character recognition.

With some scanner interfaces, you may have to find a link that allows you to adjust the quality of the scanned image or choose advanced settings.

After making the appropriate settings on your scanner interface, click Scan (or whatever command your scanner uses to actually start scanning. The scanner will scan the page and ask if you want to scan more pages or if you are done. When you click done, you will return to Acrobat. It may take a while for Acrobat to perform the Optical Character Recognition.

If you don't need Optical Character Recognition

Scan at 300 dpi anyway. With Acrobat's adaptive image compression, it **actually makes a smaller file** at 300 dpi than it does at lower resolution! (**note:** if you're doing Optical Character Recognition as outlined above, the final downsampling to 150 dpi does reduce the file size)

Improving Accessibility

Acrobat files created by Optical Character Recognition don't always divide the page into correct areas of text and figures or assign the correct reading order to parts of the page. These pages as well as pages done by creating PDF's directly from the original application don't have alt tags for images.

You can correct some of these problems with the Touch up reading order command found under the Advanced menu, off the Accessibility submenu.

To add Alt tags to figures, when in the Touch up reading order mode, control-click on the figure and select Edit Alternate Text from the pop-up menu.

Opening an existing scan as an acrobat file

From the **File** menu select **Create file** or from the Tasks toolbar select **Create PDF**, and then **From File**.

A standard file dialogue box will appear:



Navigate to the location of the file you wish to convert. At the bottom of the dialogue select the type of file you wish to convert to PDF. Only that type of file will appear on the list.

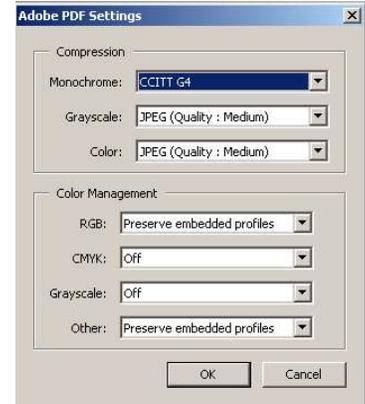
There will be a settings button that will give you options for different types of files.

The defaults for these settings are typically set to apply medium levels of compression to images without affecting image quality. The file size reduction can be significant.

Adding additional image files to the PDF

Use the **Insert** command (see next page). The procedure is the same.

If text is part of the image file and you want to create a **Searchable Image** document, you can use the **Recognize Text using OCR** command under the **Document** menu after you have opened it as a PDF. You will be able to choose options similar to the **Create PDF from Scanner** command.



Recognize text using OCR will not work with images that are lower than 144 dpi, and will be more accurate the higher the resolution.

Creating a PDF from a Web page

From the **File** menu select **Create file** or from the Tasks toolbar select **Create PDF**, and then **From Web Page**.

You can enter a URL or browse to an HTML file you have saved on your hard drive.

You can choose to save only the page you're on, or the whole site. *Be careful about choosing the whole site. Pages may not be in the order in which links are followed and may include more pages than you expect. When clicking on a link in a PDF from a web page, you have the option of adding that page to your PDF.*

Transferring text from Acrobat to Word.

Text created by OCR in Acrobat can be copied into other applications (See *Copying from Acrobat files*, p. 10), but it places a hard return at the end of every line. The text portion of an Acrobat file can be **Saved as** a *Microsoft Word* document with the paragraph breaks in the proper place. However, some files, including Searchable Image files created in Acrobat, the export to Word doesn't always work.

If you want to get the text out of Word with the paragraph breaks in the proper place, first save the Acrobat file as **Text (Accessible)**. This format puts a hard return at the end of the every line, but also puts two hard returns at the end of every paragraph.

Open the text file in Word. You may have to change files of type in the file dialogue to **All Documents** or **Text files**.

Once the file is open in Word, select **Replace** under the **Edit** menu.

First in the **Find what** window, type **^p^p** (^ is the upper case of the 6 key). In the **Replace with** window, place some symbol which doesn't exist in the document. I usually use the vertical bar | (Upper case on the \ key) and click **Replace**. This will mark the location of the paragraph breaks

Then, in the **Find what** window, type **^p**, clear the **Replace with** window, and click **Replace**. This will remove the paragraph breaks at the end of each line.

Finally, in the **Find what** window, type the symbol you used in step 1, and in **Replace with** type **^p**. This will restore the paragraph breaks at the end of the paragraphs.

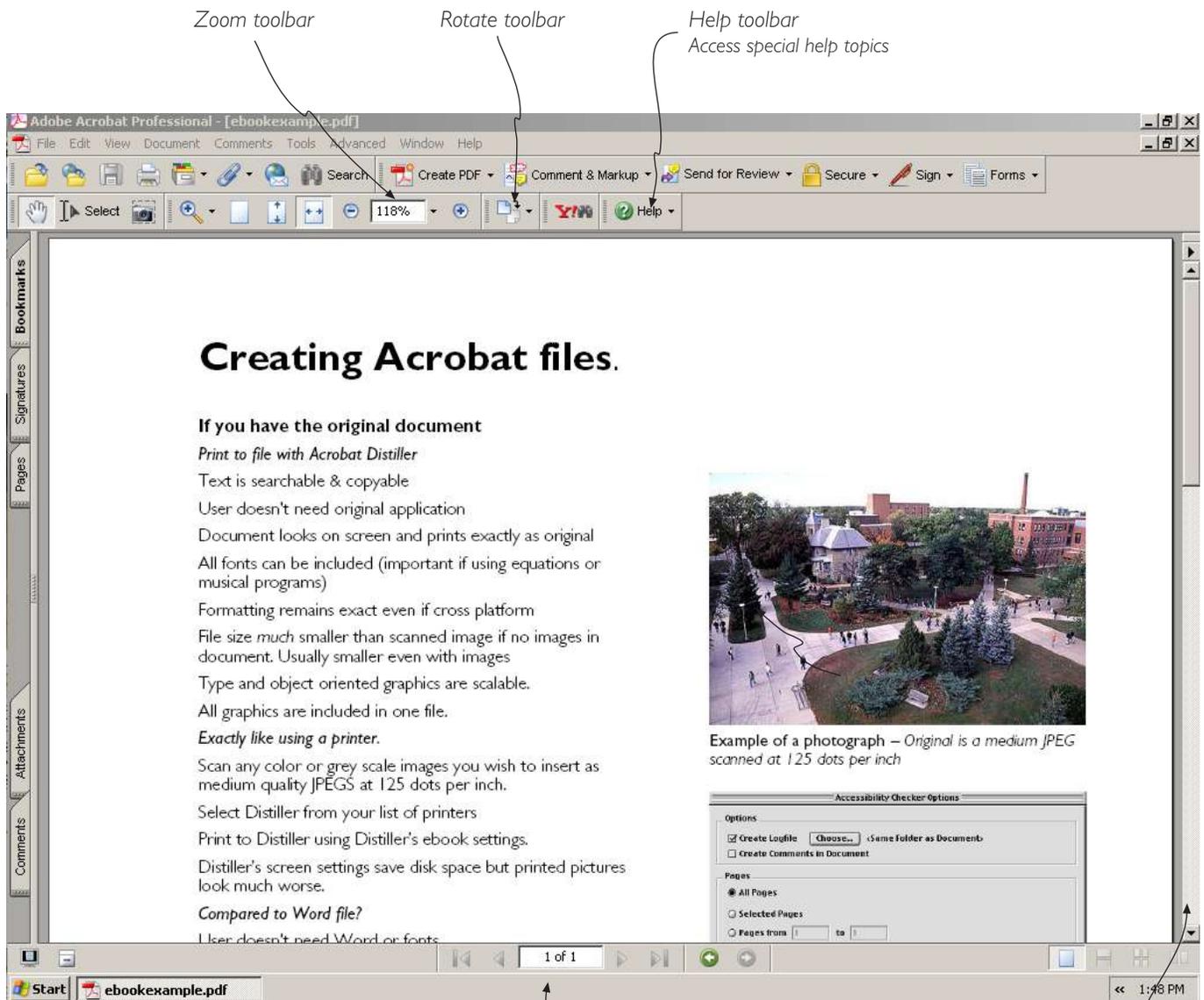
Viewing and modifying Acrobat files

There are several products in the Acrobat Family, and they all share a similar interface, differing in how they create and modify Acrobat files.

The free **Acrobat Reader**, downloadable from <http://www.adobe.com/products/acrobat/readstep2.html> allows viewing of any PDF file, copying text and graphics from a PDF file, saving a copy of a PDF and filling in forms. The content of the filled-in form cannot be saved with the free reader.

Acrobat Standard adds the ability to create PDF files from any application, combine and divide PDF files, set certain types of security and save filled-in forms.

Acrobat Professional adds the ability to create forms which includes documents that can be electronically signed.



Zoom toolbar

Rotate toolbar

Help toolbar
Access special help topics

Clicking the Pages tab will display thumbnail images of the pages in the document. Clicking on a thumbnail will take you to that page

Step through pages one at a time or enter a page number and go directly to that page.

Scroll bars scroll through the entire document, not just the page you're on.

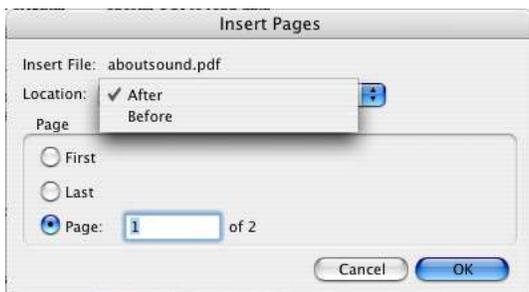
Modifying a PDF file

Commands for adding, deleting, replacing and otherwise modifying files are found under the **Document** command



Insert

This will launch a standard file dialogue box. You can choose to insert other PDF's or an image file. Select the file type at the bottom of the file dialogue box.



You can specify where in the document you want the new document to be inserted.

All pages of multipage documents will be inserted.

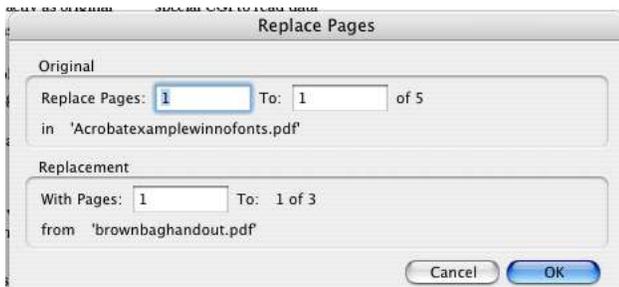
Extract

You will be prompted for which pages you wish to extract. Extracted pages appear as a new document titled *Pages from [original file name]*. You have to save the new file in order to keep it.

You have the option to delete the extracted pages from the original document if you're dividing one PDF into several.

Replace

You will first be prompted for the file from which to get the pages which will replace those in the original file, with the same options you have with Create from file or Insert.



You are then prompted for which pages you wish replaced and which pages in the other document you wish them replaced with.

If the page being replaced has form fields (see *Creating forms in Acrobat* p. 12), only the underlying page is replaced, the form fields are retained. If the PDF file the page was replaced *from* has form fields, those form fields are not included. If you wish to replace a page with a page with form fields from another document, use the Insert command and Delete the original page you wish replaced.

If you have created form fields in a document, replace pages will only replace the underlying page. The form fields will be unaffected.

Delete

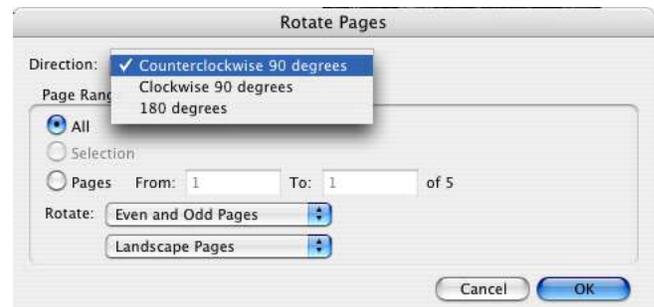
You will be prompted for the pages you wish to delete.

Clicking on the Pages tab at the left side of the screen will display thumbnail image of the pages in the documents. Holding down the Shift key while clicking on them will selected multiple pages. The delete dialogue will then include the option of deleting selected pages.

Rotate pages

Individual or multiple pages can be rotated.

You can choose to specify only certain formats of pages. For example, if you had inserted several landscape pages into an otherwise portrait format document, you could specify to only rotate those landscape pages.



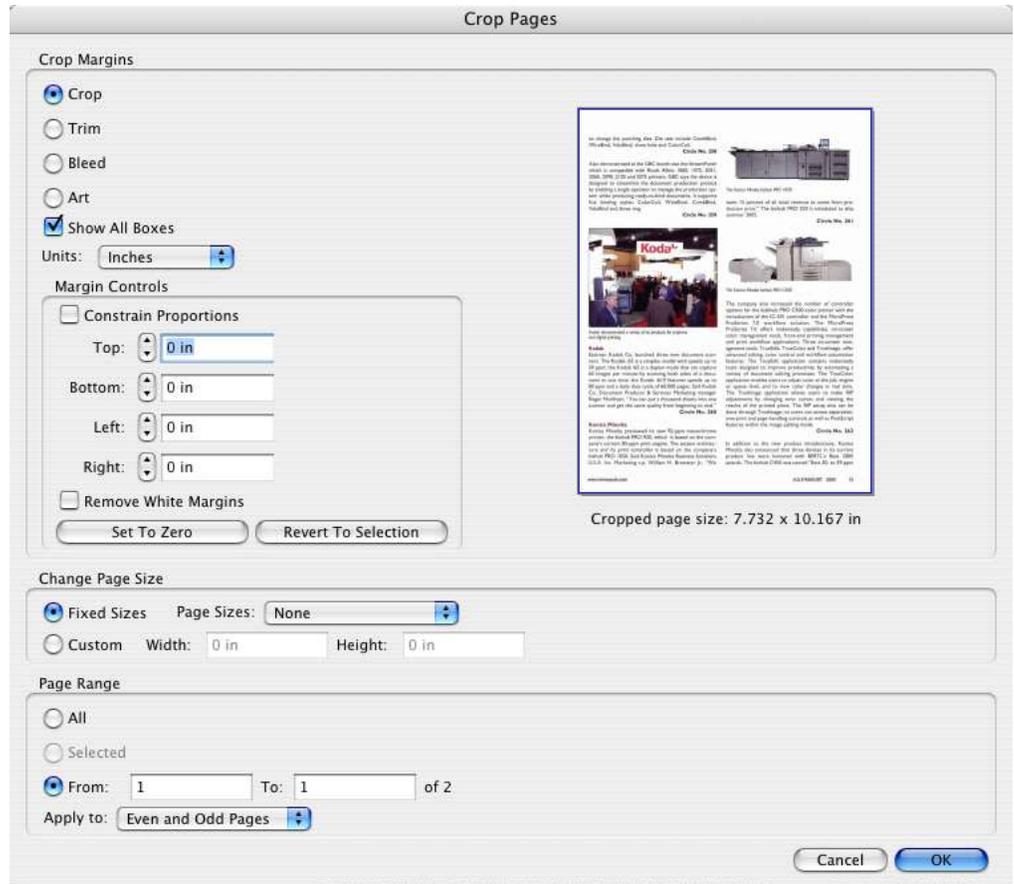
Crop pages

One or more pages can be cropped in order to preserve just a section of a page, to remove excess borders or to make a uniform page size of a document assembled from different sizes.

When cropping values are entered, in addition to the thumbnail display on the dialogue box, guidelines appear on the full size display.

In addition to specifying the crop by measurement with this command, there is a **Crop** tool on the **Advanced Editing** menu, found under the **Tools** menu with which you can visually specify the area to be retained by clicking and dragging.

Multiple pages can be cropped to the same specifications.

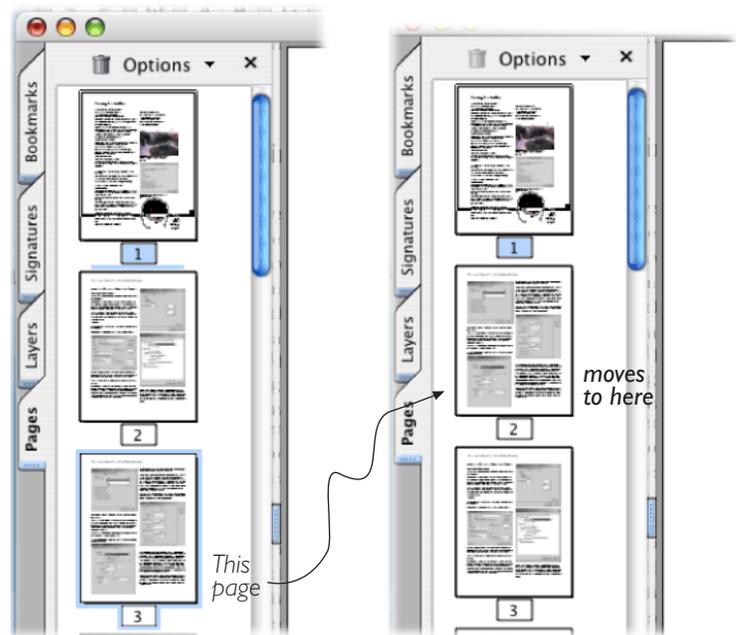


Rearranging pages

Click the pages tab on the left side of the screen to reveal thumbnail images.

When you click and drag a thumbnail image, a light blue line appears between pages as you drag up or down. When the line is in the new location you wish the page to be, release the mouse button and the pages will be rearranged.

Multiple pages can be selected and moved by also holding down the shift key while you're clicking to select them.



Copying from Acrobat files

If the document is text-based, you can copy from it and paste into other applications.

On the Basic toolbar there are two selection modes, for Text, and Image.

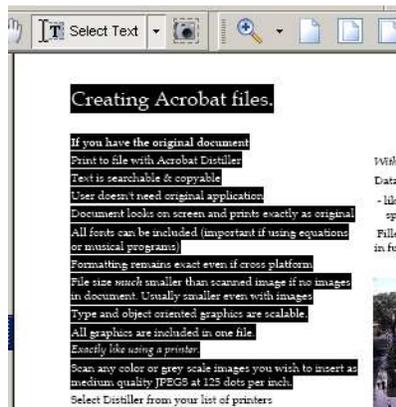
(Copying can be done with *Acrobat Reader*)



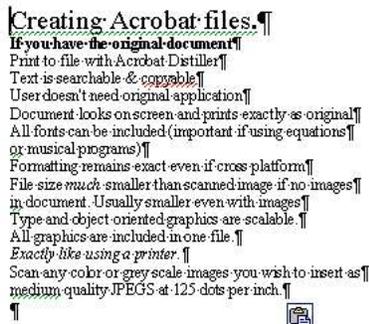
Select text

In the Text mode, text is selected as in another text-based application. Click and drag over it and the text will be selected following the normal flow of columns.

To copy, from the Edit menu select Copy, or use the keyboard equivalent Ctrl-C in Windows or Cmd-C on a Mac.



As illustrated in this segment pasted into a Microsoft word document with the formatting codes displayed, every line from an Acrobat document comes in as hard return. Otherwise it comes in as rich text, with font, size and style intact.



See [Transferring text from Acrobat to Word, p.6](#)

Select Table

If the text you wish to copy is in tabular format, when you place the cursor over it when in the Copy text mode, the cursor will change to the table icon



Click in the table to select the entire table, or click and drag to select only a part of the table.

To copy, Control click and select Copy table.

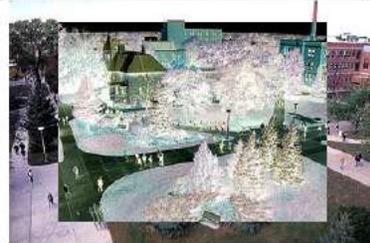
Select Image

Click on the Select image icon. The cursor will change to a cross hair. If you place the cursor over an area that Acrobat recognizes as an image, click and the image will be copied to the clip board. If you click and drag, only the area you indicated will be copied.



ted image if no images
en with images
s are scalable.
file.

es you wish to insert as
ts per inch.
rinters
ebook settings.
sk space but printed



Example of a photograph – Original is a medium JPEG scanned at 125 dots per inch

bout half. Screen

The selected area can be pasted into another application

Exporting text and images

There are options in the **Save as** dialogue to save all text in the entire document as an RTF (rich text) or Unformatted Text file.

Under the **Advanced** menu is the **Export all images** command which will save all images in the document as separate image files in a variety of formats.

In some documents these functions won't work correctly. In that case, image can be copied as above.

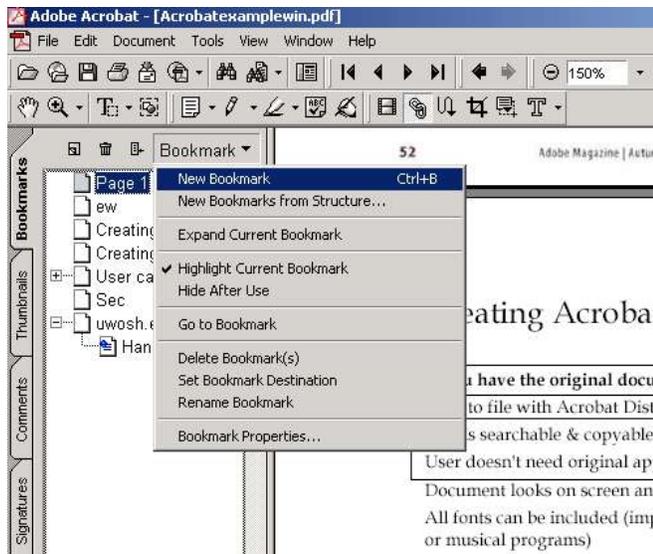
See [Transferring text from Acrobat to Word, p.6](#)

Searching and editing text

Text is searchable with the **Find** command under the **Edit** menu

You can do minor edits of text in an Acrobat file. Under the **Tools** menu, off the **Advanced Editing** submenu, choose **Text touch up** tool. If you have select multiple lines to be edited, you need to place hard returns at the end of each line to wrap to the next line.

The Text touch up tool will only work if the entire font has been embedded in the document, or if you have the font installed on your computer.



Bookmarks

Click the **Bookmarks** tab to open the Bookmarks pane.

Under the **Bookmark** menu, select **New Bookmark**. A book mark will appear as Untitled. You can double click on the name and edit it. If you go to another page and click on that bookmark, it will return you to the top of the bookmarked page.

If you choose **Text select** tool, select some text and then **New Book** mark, the new bookmark appears with the selected text as it's name.

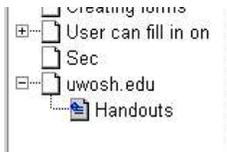
To create a bookmark on an image, with the Text select tool, drag out an area, hold down the Control Key (Windows) or Command Key (Macintosh) and release the mouse button. Then select **New bookmark**. It will appear as untitled, because even if you select an area in which there was text, it was just a picture of the text.

You can edit the name of the bookmark by double clicking on it.

When you select the book mark from another page, it will take you to the area that was selected when you created the bookmark.

Bookmarks return you to page magnification in which bookmark was created.

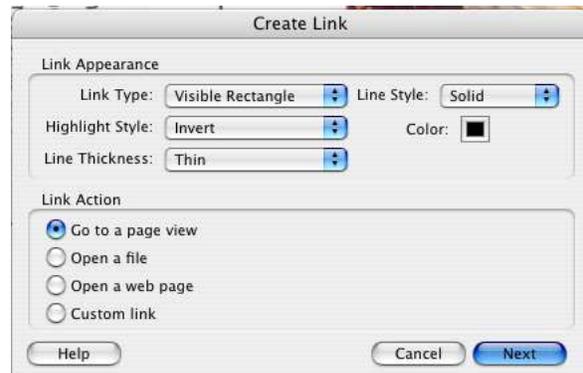
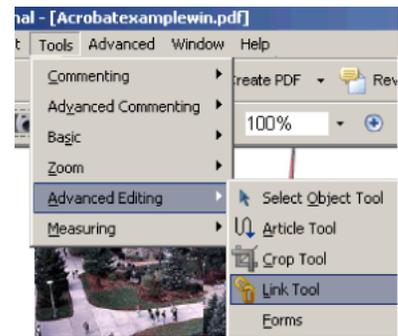
To rearrange bookmarks, click on the bookmark and drag. If you drag the bookmark to the right of another bookmark icon, it will become nested under that bookmark. Plus and minus marks open and close nested bookmarks.



If you had used style designations for headings when creating documents in some programs, such as Microsoft Word or Adobe InDesign, bookmarks may be created from those styles when you create the PDF.

Links to other documents & web sites.

Under the **Tools** menu, off the **Advanced Editing** submenu, select **Link tool**. The Link tool also appears on the Advanced Editing toolbar if it is displayed. Click and drag to select an area.



After the link is created, double click on it to modify it's appearance. You can choose to have links indicated by a visible rectangle. One of the choices of styles for visible rectangle is underlined, similar to the way a link is indicated on a web page. Note that the underline style is just a line at the bottom of the area you have selected, not an underlining of the text. The default color is black, but you can change it to blue to mimic a web browser.

If you choose to not have links outlined (invisible rectangle) they are not indicated in any way except that the cursor turns into a hand with a pointing finger when you move over it.

Note: Links you have created in the original Word document will not be active but will still look the way they were in the original document.

Several options appear which includes several types of link actions including linking to other files or web sites.

It the user is working on Acrobat Standard or Professional, when they click a link to a website, they can choose to open it in Acrobat or Web Browser. If opened in Acrobat, it will convert the page to a PDF which can be saved.

Creating Forms in Acrobat

Acrobat 7 for Windows includes a new application, *Adobe LiveCycle Designer* (It shows up on the All Programs menu as just *Adobe Designer*) that creates Acrobat forms from scratch and allows editing of form fields and all other text in a form and may include form functions that aren't available in Acrobat. Forms can still be created and edited in Acrobat in the manner for previous versions. Existing forms can be imported into *Designer*, but *can then no longer be edited with Acrobat. The following directions are for working only in Acrobat and do not include directions for Designer.*

Only Acrobat Professional can create forms. With the free Acrobat Reader, forms can only be printed or saved as an empty form. Filled-in forms can be saved with Acrobat Standard or Professional. Data can be submitted electronically with Acrobat reader but requires some server side software to receive and store the data and may have other requirements. See *Submitting forms* . p.15.

Create the underlying form

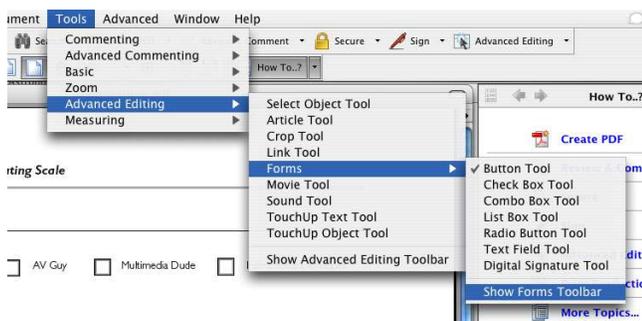
First you have to create the form in whatever application you are familiar with as though it would be filled in by hand, and create a PDF file of it. You could also scan an existing form if you don't have the original file that created it.

Make sure the user will know where to fill in a text field. For short answers, you can use a line like on any form. For longer responses it might be better to put a box around it. You can add borders and check boxes as properties of a form field, so you don't have to draw these in your original document. Be careful on how you phrase instructions so the user knows what to do to fill the form in onscreen and submit it on line if it's set up that way.

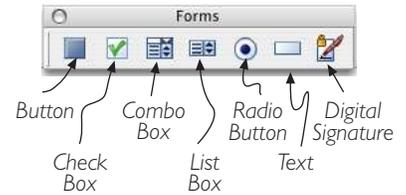
Keep in mind that text fields are all rectangles and can't have an indent. If you ask a short question, you can't have the text field begin on the line the question is on and then wrap to the beginning of the line below it.

Forms tools and toolbar

In order to create form fields, from the **Tools** menu, from the **Advanced editing** submenu, select **Forms** to see the tools available to create form fields.



The Forms toolbar can be displayed to keep the Forms tools accessible.

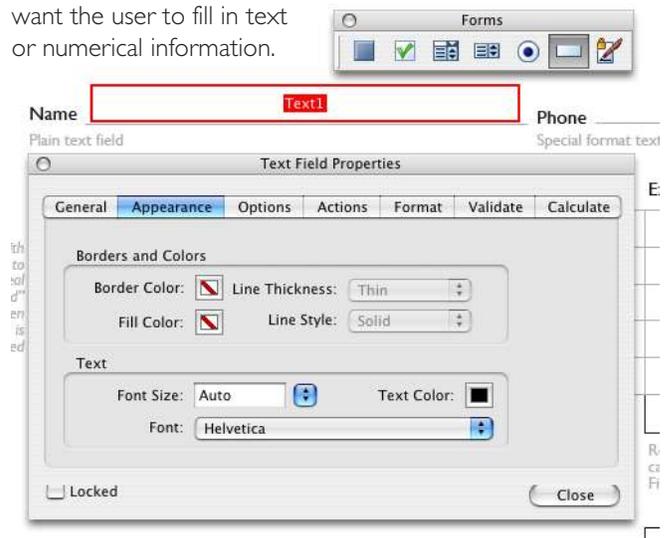


Each type of form field has a tool used to create and modify tools of that type.

To create a form field, select the tool. The cursor will change to a cross hair. Click and drag out the area which you want the field to fill.

Text fields

One of the most common fields is the text field, where you want the user to fill in text or numerical information.



The cursor becomes a cross hair and you click and drag out an area to define the field. When you release the mouse button, the area is indicated and a dialogue box opens in which you can specify properties of the field. which are grouped under seven tabs. When you begin the **Appearance** tab is displayed but thereafter the tab you were on when you closed the dialogue will be displayed when you modify a field or create a new one.

Appearance field properties

You have a choice whether to have a border or fill (or not) and choose the width and color of the border if one is used. If you have created a line or box in your original file to indicate where text is entered, choose no line. Use lines and fill colors sparingly to prevent your form from appearing cluttered and busy. If you do place a border on a field, use a thin border and a lighter shade of grey. You may wish to emphasize special fields with a light fill color or a thicker border.

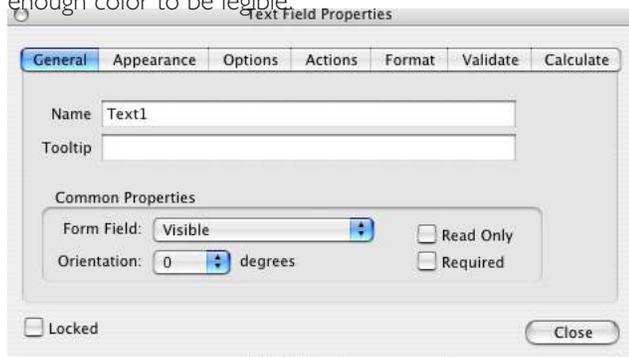
You can choose the typeface and the size and color in which text entered in a field appears. The top of the list includes faces that Acrobat considers universally available. If you choose any other typeface, it has to be embedded 100% or installed on the user's computer in order to be displayed correctly.

You may wish to select a different typeface from that in which the original form was set in order to distinguish entered information.

It's preferable to choose a specific **Font Size** and make sure the field is large enough to accommodate the information you intend to be entered.

If you choose **Auto** for the Font Size, Acrobat will begin with a size based on the size of the field and as the field becomes filled, reduce the size of the type until it's unreadable.

You may also select a color so that entered text is clearly distinguished from the form itself. Be sure to choose a dark enough color to be legible.



General field properties

By default the field **Name** will be the type of field and a serial number. You may wish to change the field name to identify the contents of the field. With special server side resources, data can be electronically submitted from a PDF form. Field names can identify the data entered. (In previous versions, entering a unique field name was required.)

If two text fields have identical names, when one is filled in the other will also be filled in. This can be used to repeat a user's identification on multiple pages or carry the results of calculations from the bottom of one page to the top of the next.

If you enter something in the in the **Tooltip** box it will pop up as a note when the cursor is held for a second over the field.

You can choose to make the field **Visible** or not and choose whether it is **Read Only** so the user can't change it .

For example, you may have respondents categorized and don't want them to be able to alter that. You may not want them to know how they are categorized so you might want the field hidden. Text files can be limited to numbers and the values of fields can be calculated (See *Calculate* on the next page). You may not want the user to modify some of the values (like a price) or see the basis or result of a calculation.

Options also exist for making a field visible, but doesn't print (e.g. instructions or warnings) or not visible but that do print. (e.g mailing label, user category).

Options field characteristics

You can choose to **Align** the text the user enters left (most text) right (most numbers and some text columns) or centered.

You may wish to start with a standard value. The **Default Value** will appear in the field. In order to change it the user has to select the text and type over it.

If **Multi-line** is checked, text will wrap to a second and subsequent lines.

If **Scroll long text** is checked, the field will accept more text than the size of the field will hold. If Multi-line is not checked, text will scroll to the left and will disappear out the left side of the field. In order to review the text that has been entered, the user must use the arrow keys to move the cursor: When the cursor has move to the left side of the field, the text will scroll back into view.

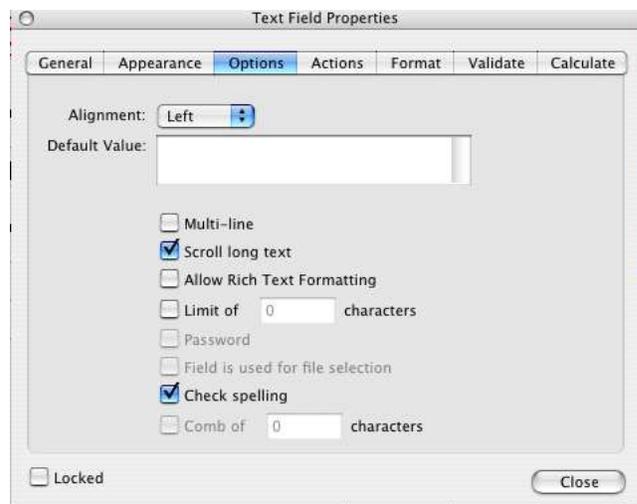
If Multi-line has been checked, text will wrap to second and subsequent lines. When the area of the field has been filled, it will scroll off the top and a scroll bar will appear on the right side of the field, allowing the user to review entered text.

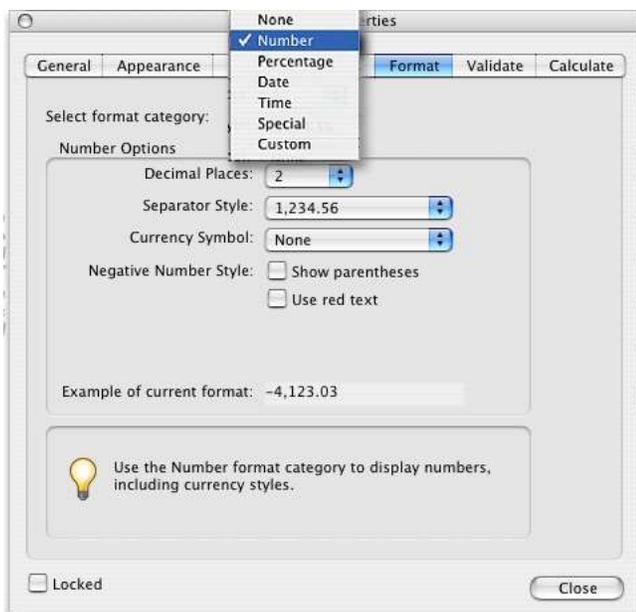
If Scroll long text is not checked, only as much text as will fill the field can be entered.

Allow Rich Text Formatting allows the user to apply style changes such as bold or italic text, super or subscripting or change the typeface or it's color. In order to actually make these changes, the user has to display the Text Field Properties toolbar: If the toolbar is displayed and a field doesn't allow Rich Text Formatting, all the functions on the tool bar will be greyed out.

Entering a value for **Limit of characters** will only allow that many characters entered, even if the field will accommodate that. Useful when you want to limit numerical entries to standard numbers like product IDs.

When **Password** is checked (i.e. the entry in the field is a password) , entered text appears as asterisks.





Format field properties

You can specify specific formats of entry, such as distinguishing numerical entries in anticipation of calculations, or limiting entry to specific formats such as social security number. If the user attempts to enter something other than the specified format in the field, nothing appears and Acrobat beeps. Version 7 of the free reader displays a message that the entry doesn't match the specified format, but doesn't indicate what the format is. Use instructions and brief descriptions to assist your users.

Validate field properties

You can limit entries in ways not specified under format, such as limiting numerical entries to certain ranges. If the user attempts to enter data outside the range, they are prompted with a message that specifies the allowable range. You can also write custom Javascripts to specify allowable entries.

Calculate field properties

For fields with numerical formats you can automatically add, multiply, average or select the minimum or maximum of a specified number of other fields. For example, you could multiply a price in a read-only field by a user-entered quantity to automatically fill in a total cost field. You can create hidden fields to supply values for calculations.

More complex calculations can be made using spreadsheet like formulas or writing custom Javascript.

Modifying, moving, and resizing fields

When the appropriate tool is selected, fields created by that tool will display a border with handles. Double clicking on the field will open the Properties dialog. Click and dragging will move the field, and clicking on a handle and dragging will resize the field.

Check box fields

Check box fields are for lists where more than one option can be selected.

Appearance The default is to draw a border to actually create the box to check. If there are boxes already on your form, you can select No Color:

Options: You can choose the style of what appears (X, filled in, check mark) when the box is checked.

You can give it a value. The default is yes, but could be other text, or a numerical value that could be calculated in another field (a discount for belonging to a group, for example).

Radio Button fields

Radio Buttons are used where users can select only one option from several choices. Very similar to Check boxes except that they must all have the *same* name, and must have *different* export values.

Combo Boxes and List Boxes

Also allow the user to choose one of several options. Combo boxes appear as a pull down menu. In List Boxes all the options are visible, but the user has to click on the appropriate choice which is then highlighted. If the list of items in a List Box field is larger than the field, scroll bars will appear.

Digital Signature fields

Signature fields can potentially be used like any signature, but require some sophistication and understanding of the process by the user as well as other communication via email to verify the signature.

Duplicating, aligning and positioning fields

Under the **Tools** menu, off the **Advanced Editing** submenu, select the **Select Object** Tool

Right click (Windows) or hold down the Control key and click (Macintosh) and a menu of items appears that allows you to create identical duplicates of a field, but with unique names.

You can select multiple fields with the Select object tool by holding down the Control key (Windows) or Option key (Macintosh) and clicking. The right click (Windows) or Control click (Macintosh) menu will have options for aligning or evenly distributing fields when multiple fields are selected.

You can display a grid to help position fields by selecting **Grid** under the **View** menu.

Submitting forms

With Acrobat Reader you can only print a filled in form. It cannot be saved. With the full version, the form can be saved.

Form data can be submitted electronically, but this requires software residing on a server. At UW Oshkosh we have two methods—"mailto" which sends an email containing the data to a specified address and "write to" which writes the data to a specified delimited file which must be created specifically to receive the data.

In both cases in order to submit the form the user must be using the full version of Acrobat, Acrobat reader 6 or higher or version 4 or 5 of the reader as a browser plug-in. If using the standalone version 4 or 5 of the reader, a submit button won't work.

If the user just clicks on a link on a web page the browser will automatically launch the reader as a browser plug-in if it's installed.

If the form is supplied as a file (on a CD), It would be safest to place a link to the form file on an HTML page, so when the user clicked on the file icon, the browser would launch. The user would then click on the link to the PDF in order to launch the plug-in version.

If the user double clicks on the file icon of the original PDF, the stand alone version of the reader will launch, and if it's version 4 or 5, the submit button will not work.

Of course, the computer must be connected to the internet in order to submit data.

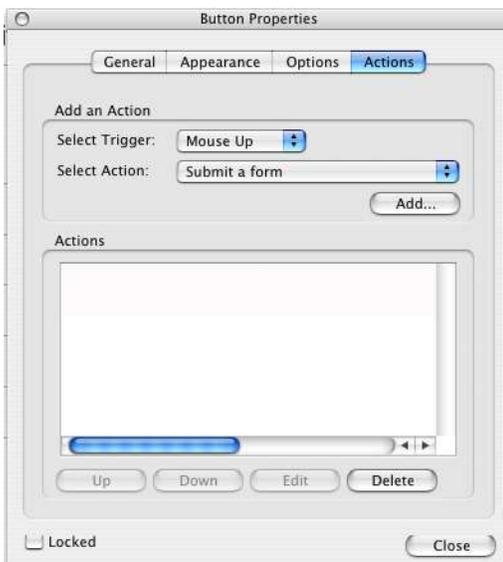
Setting up a form that can submit data.

Submit button field.

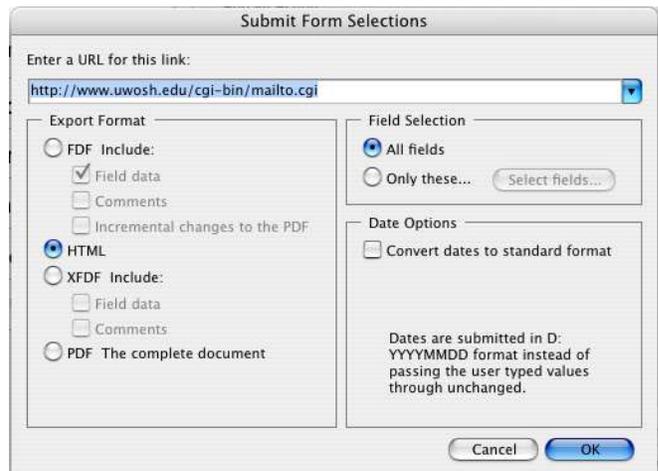
Create a **Button** field

In the **Options** panel you can specify the text that appears on the button, such as "Click here to submit your information" or use a graphic icon you've created in another application as a submit button.

On the **Actions** panel, choose Submit a form as the action, and then click Add. (A button can have several actions)



The Submit Form Selections dialogue will appear:



The **URL** is the address of the server side program which will receive the submitted data.

For *mailto.cgi*, it is <http://www.uwosh.edu/cgi-bin/mailto.cgi>

For *writeto.cgi*, it is <http://www.uwosh.edu/cgi-bin/writeto.cgi>

For **Export format** for both server programs, **HTML** is the only type of data they will deal with.

Notice that you can select only specific fields to be returned. *With both Mailto and Writeto, even if you check **Include empty fields**, unchecked check boxes will not have values returned. In the delimited file created by Writeto, it will skip over empty check box fields, causing your data to not always be entered into the same columns.*

Fields required to submit data

These fields can be filled in by the user or can be read-only so they can't be changed by the user and can also be hidden.

For *mailto.cgi*:

You *must* have a field named **to**. The default value is the email address you wish to receive the data.

You should have a field named **from**. This is what will appear in the From field in the email. If it is not a valid email address, it will appear as unknown@unkown ([text you filled in])

You should also have a field named **subject**. This will appear in the subject line as "Webmail - [text you filled in]"

For *writeto.cgi*:

You must have a field named **to**. The default value is the file name of the text file into which the data is to be written. You have to arrange with Academic Computing (Dan Pederson) for the creation of this file and ftp access to the directory in which it is stored on the main UW Oshkosh web server.

Forms that return data can be put on-line as either Acrobat Files or embedded within a web page using HTML forms command, normally edited with a tool such as Macromedia

Dreamweaver or Microsoft FrontPage. This table illustrates some of the differences in the two methods.

O N L I N E F O R M S		
Acrobat	VS	HTML
<p><i>To return data requires</i></p> <ul style="list-style-type: none"> • Acrobat Reader 4.0, 5.0 or 6.0- operating as browser plug-in • Or full Acrobat or Reader 6.0- operating as a stand-alone application 		<p><i>Any browser 3.0 or better</i></p>
<p><i>Format on screen and print always exactly the same for all users on all platforms. Matches existing printed form exactly.</i></p>		<p><i>Varies depending on</i></p> <ul style="list-style-type: none"> • browser • browser prefs • monitor • window size • printer specs
<p><i>Two step creation</i></p> <ul style="list-style-type: none"> • Layout in original application • Fields added in Acrobat 		<p><i>Created entirely in HTML editor</i></p>
<p><i>Data returned by alphabetical order of field names.</i></p>		<p><i>Data returned in order they appear in form</i></p>
<p><i>Can calculate fields based on values in other fields.</i></p>		<p><i>All fields must be filled in by user or calculated by inserted Javascript</i> <i>You could do calculations later in database, but user wouldn't see them</i></p>
<p><i>Not all fields have to be returned</i></p>		<p><i>All fields returned</i></p>
<p><i>Can be saved by user if using full version of Acrobat.</i> <i>Cannot be saved using just the Reader.</i></p>		<p><i>Must be filled in all at one session</i></p>
<p><i>Unchecked "Check box" fields can be returned but it's a little complicated.</i></p>		<p><i>Unchecked "Check box" fields can be returned but it's a little complicated.</i></p>
<p><i>Fields can overlay graphics</i></p>		<p><i>Fields cannot overlay graphics</i></p>