

# Acrobat: Creating PDF Forms

Academic Computing Services  
A Division of Information Services

[www.ku.edu/acs](http://www.ku.edu/acs)

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**Abstract:** This handout accompanies the “Acrobat: Creating PDF Forms” workshop. It describes how to add form fields to a PDF file, how to make forms that can be submitted via the Internet, and how to use Acrobat’s Digital Signature feature.

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## Introduction

One of the more popular features of Adobe Acrobat is the ability to convert print forms into documents that are printable and can also be completed and submitted online. The **Adobe Acrobat: Forms** class and this accompanying handout will give you the information you need to create and deploy these forms.

## Objectives

This class covers the following topics:

- “Distilling” documents as PDF files (brief review);
- Using the Form tool to create form fields, list and combo boxes, radio buttons, and buttons;
- Calculating and validating field data;
- Creating “submit” buttons, which post data from a PDF form to a program on the Internet.

## Prerequisites

Prior to taking this course, you must either take **Acrobat: Creating PDF Files**, or be familiar with the topics covered in that class.

## Related Training Available from ACS

All workshops offered by Academic Computing Services (ACS), a division of Information Services, are free to KU students, staff, faculty, and [approved affiliates](#). The general public is also welcome to most workshops, but some ACS workshops require a [registration fee](#) for them.

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you’ve registered for and have attended, visit the ACS Web site at [www.ku.edu/acs/train](http://www.ku.edu/acs/train). You can also check our online schedule at [www.ku.edu/acs/schedule](http://www.ku.edu/acs/schedule) for a list of class offerings and their availability. For further workshop related questions, please email [training@ku.edu](mailto:training@ku.edu).

## Acrobat Overview

First, here’s a quick review of key concepts.


To create a PDF file, you must have a **source** document. This can be a file, such as a Word or PageMaker file, a Web page, or even a print document that you wish to scan in and save as a PDF file. Acrobat is used to publish your documents, rather than to create documents from scratch.

Once you've created the PDF file from the source documents (using one of the methods discussed in the **Acrobat: Creating PDF Files** class), you can add features to it, such as bookmarks, thumbnail images, annotations, form fields, and so on.

Some of these features will only be viewable or usable when the end-user views the PDF file onscreen; other features appear onscreen and on printouts. Form fields can be configured to appear only onscreen, or appear on printouts as well.


PDF files can be published on the Web, attached to email messages, made available in Outlook Public Folders, or any other way you'd distribute electronic files.

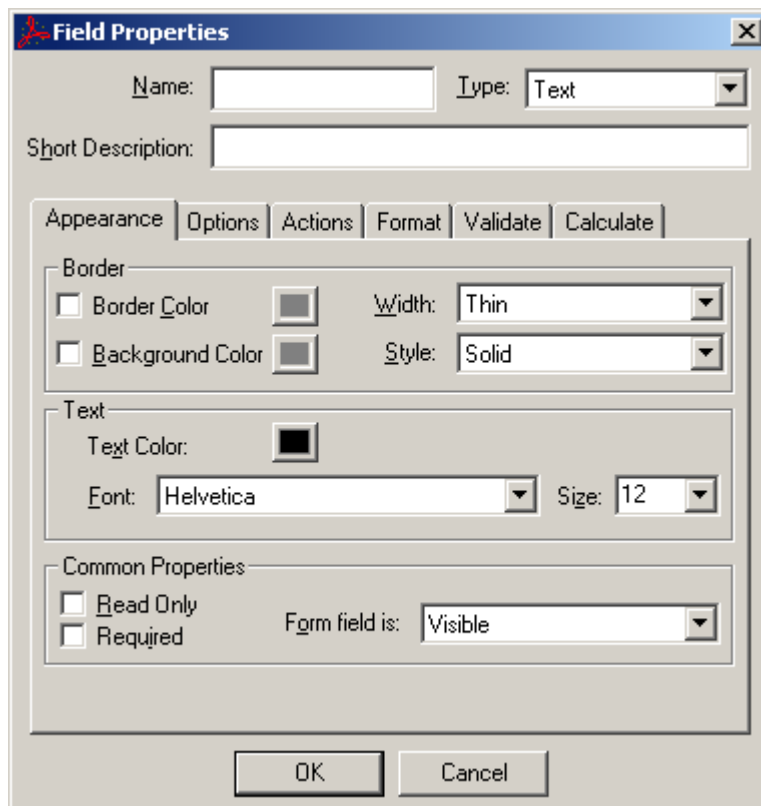
## Using the Form Tool

The Form Tool () is used to create form fields that users can complete onscreen, buttons that perform various actions when clicked (such as resetting the form, jumping to another page, or executing a script), and signature fields which users can use to digitally sign the document once they've completed it.

## Adding a Form Field

To add a form field to a PDF file:

1. Click the Form Tool () and draw a box on the page. After you draw the box (representing the field), you will see the **Field Properties** dialog box.



2. Enter a name for the field, choose the **field type**, and add a description, if necessary.

Acrobat supports these form field types (for more information, see the sections following):

**Button** – used to perform one specific action, such as clearing the form or submitting it.

**Check Box** – allows users to select an item.

**Combo Box** – creates a drop-down list of choices that you specify (such as “yes,” “no,” and “not sure”).

**List Box** – works like a Combo Box, except the user scrolls to select an item on the list (rather than clicks to view a drop-down list).

**Radio Button** – similar to a check box, except radio buttons can be set so that only one item in a list can be checked (such as “undergraduate” or “graduate”).

**Signature** – used to create a digital signature field. **Note:** in order to digitally sign a document, users **must** have either Adobe Acrobat 4.0 or Adobe Acrobat Business Tools. **Do not use Signature fields if your users will only have access to the Acrobat Reader.**

**Text** – creates a box where the user can enter text (such as their name or address, for example).

3. Change the appearance and behavior of the form by making changes in the tabbed areas below the description.

**Appearance** – sets the appearance of the field (border, fill color, font and font size, whether it appears when the form is printed, etc.), and choose to make the field **read-only** and/or **required**.


**Options** – varies by field type. For text fields, allows you to restrict the number of characters, make a field single- or multi-line, or make a field a password field (when the user types in the field, the data shows up onscreen as asterisks).

**Actions** – sets an action that occurs when the user rolls a mouse over the field or clicks on it (such as submitting, resetting, or printing the form; or navigating to a different page or file).

**Format** – restricts the text entry to numbers, for instance, or a date, or some other special type of data.

**Validate** – restricts numeric data to a certain range, or allows you to create a custom validation script.

**Calculate** – performs simple calculations on numeric data (sum, product, minimum, maximum), or allows you to create a custom validation script.

4. Click **OK** to create the form field.
5. Click the Hand Tool () , then click the field and enter data, or otherwise test the field.

## ***Modifying a Form Field***

To modify a form field’s appearance or behavior, click the Form Tool, then double-click the form field, or right-click it and choose **Properties**.

## ***Aligning and Resizing Multiple Form Fields***

Often forms will have multiple fields arranged in a table or grid layout. To line up and/or resize multiple form fields:

1. Click the Form Tool, then **Shift-click** (i.e., hold down the Shift key while you click several fields) to select all the fields in a given row or column. The first field you clicked will be red; the others will be blue.
2. Right-click on one of the selected fields, and choose the action you want from the right-click menu.

**Align** lines up the blue selected fields, using the red selected field as a guide.

**Center** centers the group of fields horizontally and/or vertically on the page.

**Distribute** distributes the selected fields evenly across the row (horizontally) or column (vertically).

**Size** resizes the height and/or width of the blue selected fields, using the red selected field as a guide.

## **Submitting Form Data Via the Internet**

To submit data from an Acrobat form electronically over the Internet, you need:

- A script or program of some kind that can process data sent from the form. The script **must** be published on the Internet (i.e., you can point to it with a URL).
- A “submit” button on the form, which is configured to perform a Submit Form action when clicked, and points to the script’s URL (that is, its location on the Internet).

## ***Export Formats***

**HTML** – saves as plain text; spaces are shown as “+” signs, delimiters are ampersands, and field/value separators are “=” signs. **Note:** This choice exports data the same way it would be exported from a Web page form. If you are using a script designed to process data from a Web page form, choose HTML export format.

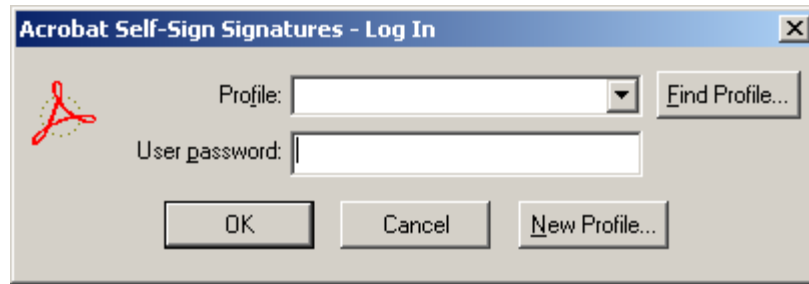
**FDF** – File Data Format, saves as data that can be imported back into a PDF form.

## **Creating, Using and Validating Digital Signatures**

### ***Setting Up a Digital Signature Profile***

Prior to digitally signing a PDF file, you will need to set up a profile for yourself by following these steps:

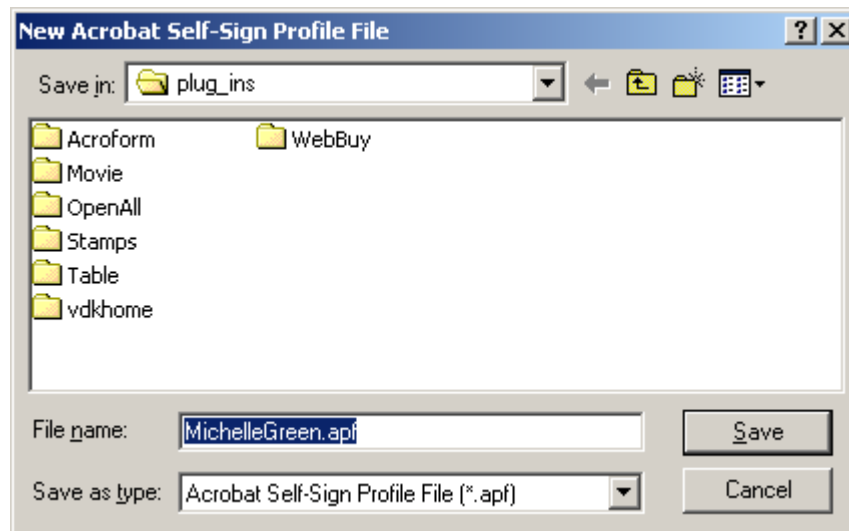
1. Click the **Tools** menu, choose **Self-Sign Signatures**, and then click **Log In**.
2. In the **Log In** dialog box, click the **New Profile** button.



3. In the **Create New User** dialog box, enter your information and a password, and then click **OK**.

The screenshot shows a dialog box titled "Acrobat Self-Sign Signatures - Create New User". It has two main sections. The first section, "User Attributes", contains four fields: "Name (e.g. John Smith):" with the value "Michelle Green", "Organization name:" with the value "University of Kansas" and "(optional)" to its right, "Organization unit:" with the value "Academic Computing Services" and "(optional)" to its right, and "Country:" with a dropdown menu showing "US - United States" and "(optional)" to its right. The second section, "Profile File", contains two password fields: "User password:" and "Confirm password:", both with masked characters (xxxxxxx). At the bottom, there is a text box stating "Creates a 1024-bit RSA private signing key and X.509 public key certificate, and stores these in a password-protected profile file." and two buttons: "OK" and "Cancel".

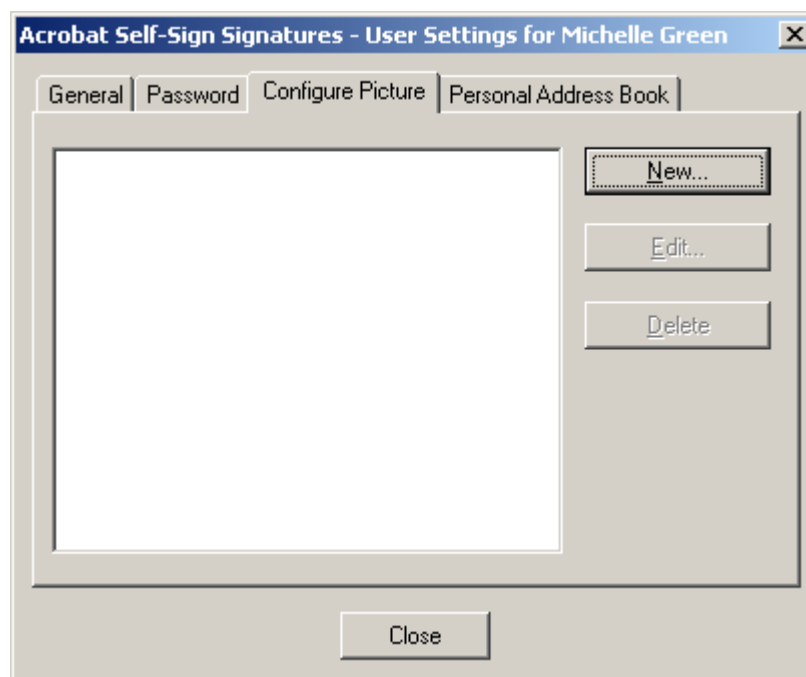
4. In the **New Acrobat Self-Sign Profile File** dialog box, change the file name and/or location if desired, then click **Save** to create your user profile.



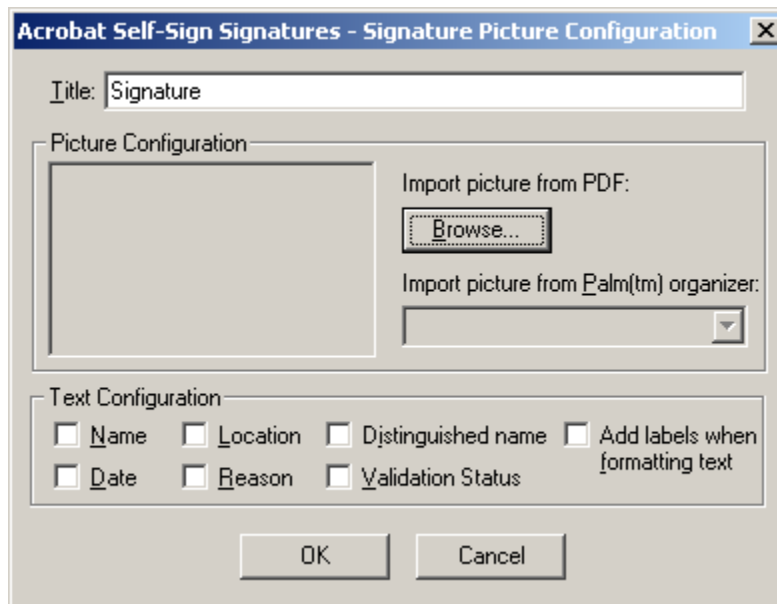
## ***Changing the Appearance of Your Signature***

To change the appearance of your digital signature:

1. Click the **Tools** menu, choose **Self-Sign Signatures**, and then click **User Settings**.
2. In the **User Settings** dialog box, click the **Configure Picture** tab. Click the **New** button.



3. In the **Signature Picture Configuration** dialog box, type in a title for this configuration (such as “Signature”).



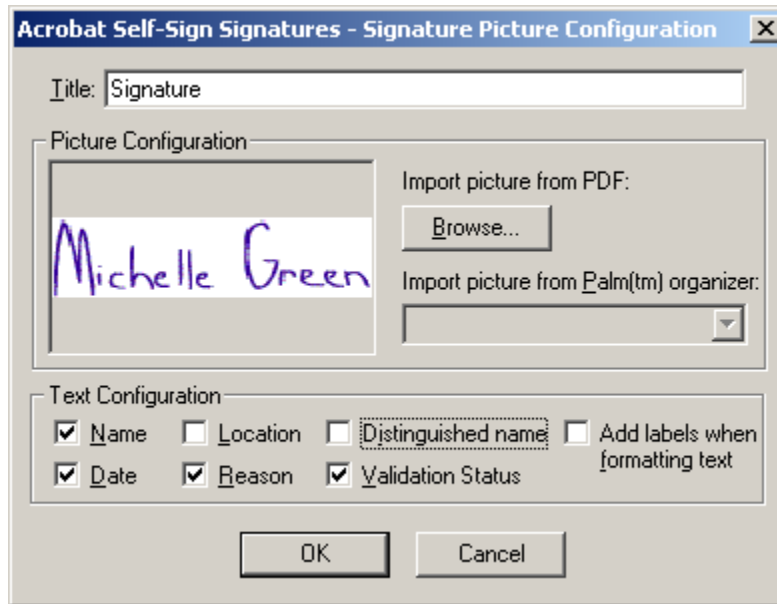
4. If you have an electronic image in PDF form that you wish to use with your signature, click the **Browse** button, and locate it, then click **OK**.



**Note:** If you want to create a PDF image to use with your signature, close the User Settings dialog box and either scan a print image directly into Acrobat, or import an image file into Acrobat; then return to User Settings to complete this process.





5. Under **Text Configuration**, check any information you would like to appear in text form beneath the graphic you selected.




6. Click **OK** and then **Close** to complete the configuration.

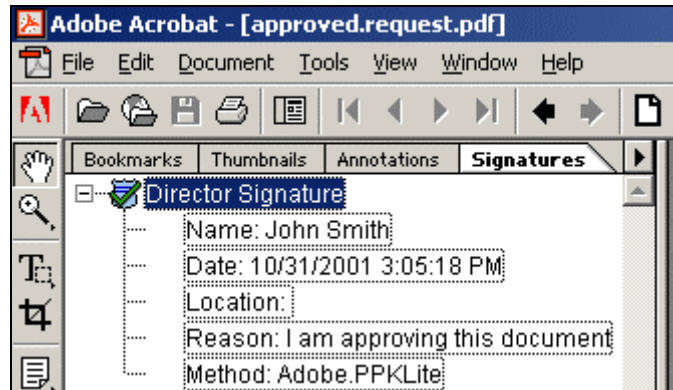
## ***Digitally Signing a Document***

There are two ways to digitally sign a document: by selecting the Digital Signature Tool () and drawing a box with it on the page, or by clicking a Digital Signature form field. Once the document has been signed, a yellow key icon () will appear at the bottom of the Acrobat window.

## ***Validating Signatures***

To ensure that a signature is valid, you can validate the signature's security certificate (contained in a Key File). To do this, you will need to receive and import a Key File from the person signing the document. See the sections below for detailed instructions on exporting and importing Key Files.

To validate a signature: right-click on the signature, and choose **Validate Signature** from the right-click menu. To check the results, click the **Signatures** tab in the **Navigation Pane** (or click the yellow key icon  at the bottom of the Acrobat window and click **Show Signatures**). In the example below, the green check mark and blue shield icon indicate that the signature is valid.



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**Note:** The green check mark indicates that the document has not been altered since it was signed. The blue shield indicates that the signature has been validated against a **key file** that you have imported into your Acrobat Personal Address Book. See the **Importing Key Files** section, below, for instructions on receiving and importing a key file.

If Acrobat cannot find a key file in the address book to match the signature, it will display only the green check mark.

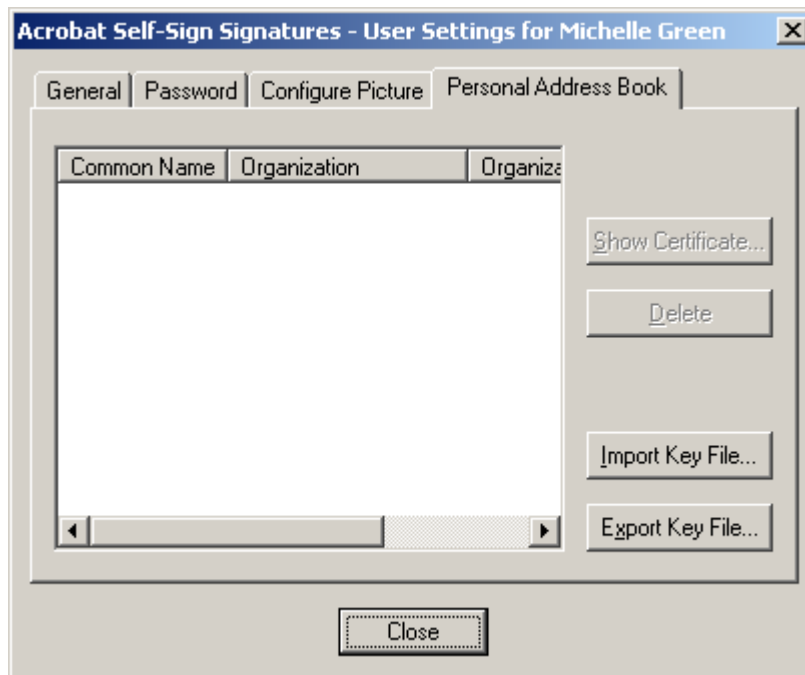
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## Exporting Key Files

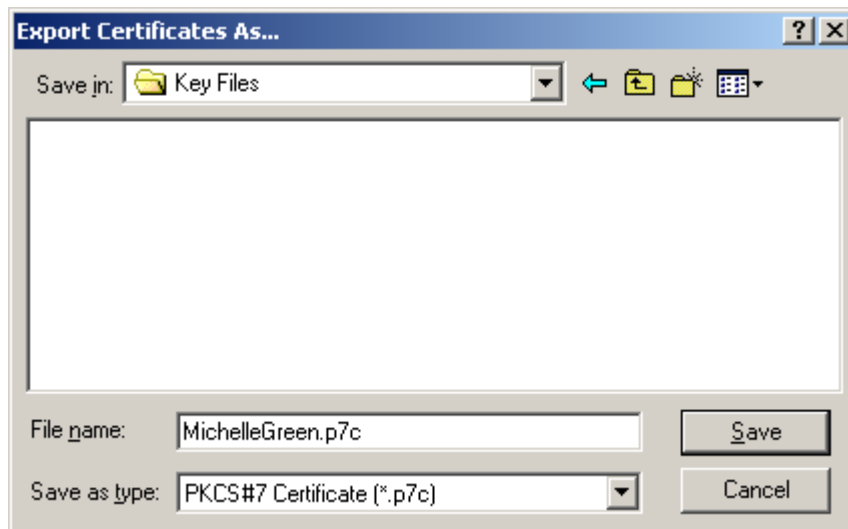
To allow others to validate your digital signatures, you must export and send them your personal Key File:

1. Click the **Tools** menu, choose **Self-Sign Signatures**, and then click **User Settings**.

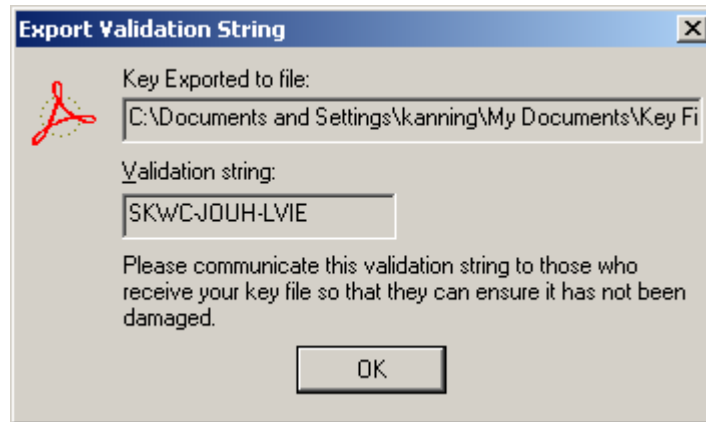
2. In the **User Settings** dialog box, click the **Personal Address Book** tab. Click the **Export Key File** button.



3. Choose a new file name and/or location for the Key File if desired, and click **Save**.



4. Copy the validation string shown in the next dialog box (in the example below, the validation string is SKWC-JOUH-LVIE), and click **OK**.

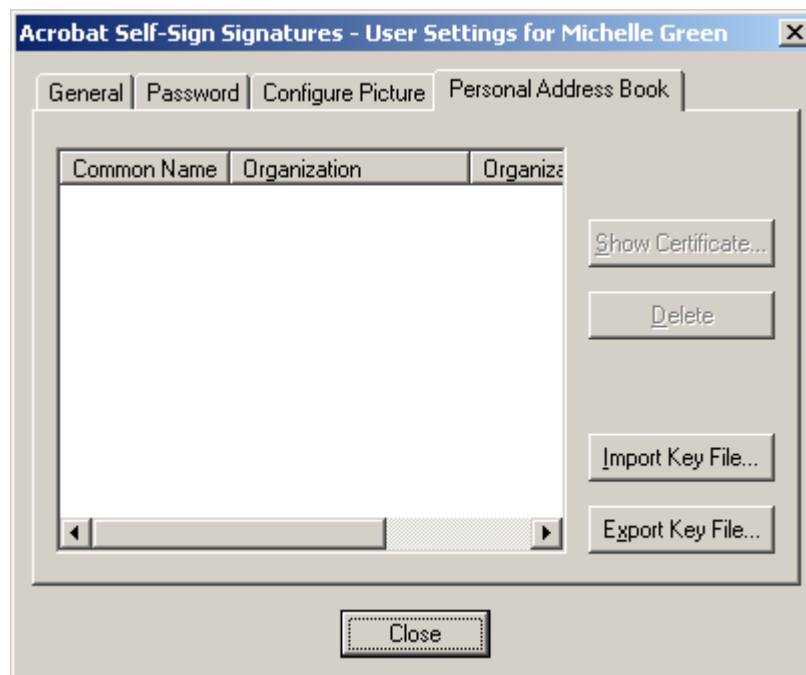


5. Send or deliver the exported Key File to those who need to validate your signature. For instance, the key file can be sent as an email attachment, with the validation string typed into the body of the email, or delivered on disk or over the network.

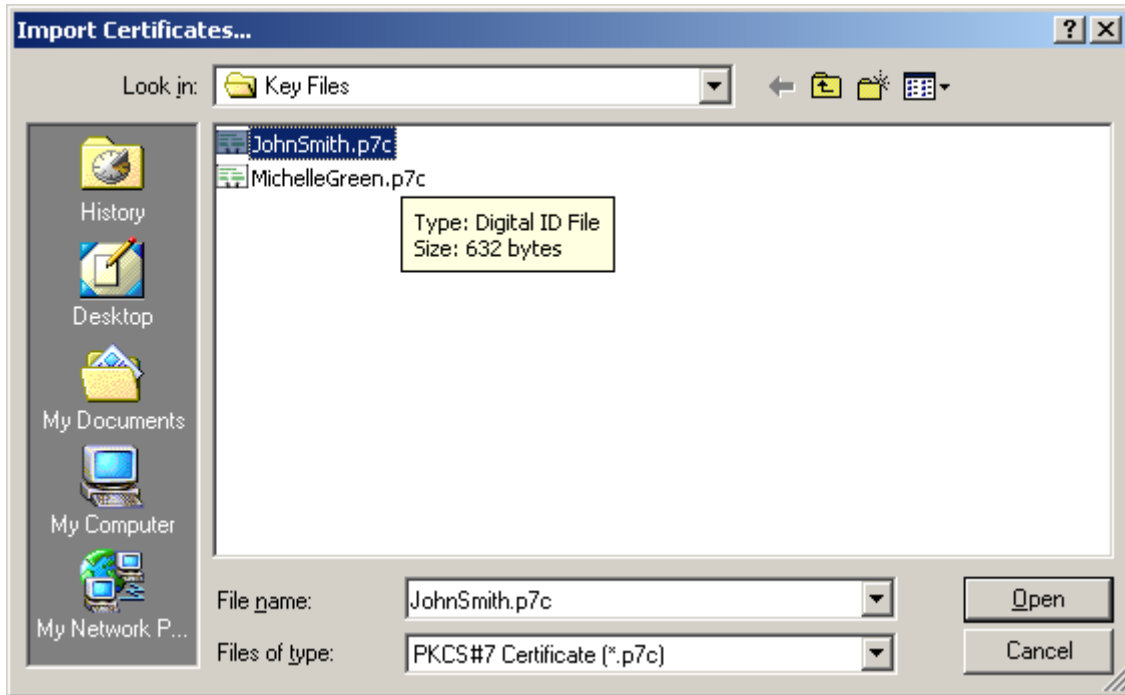
## Importing Key Files

To validate the digital signatures of others, you must receive and import their personal Key Files:

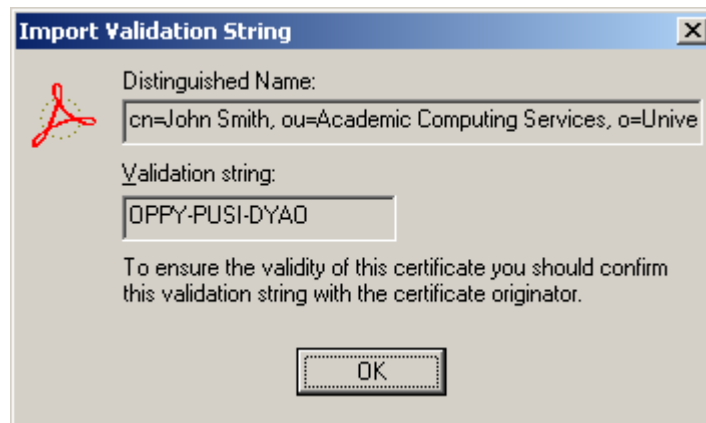
1. Save the Key File you wish to import on your computer.
2. Click the **Tools** menu, choose **Self-Sign Signatures**, and then click **User Settings**.
3. In the dialog box, click the **Personal Address Book** tab. Click the **Import Key File** button.



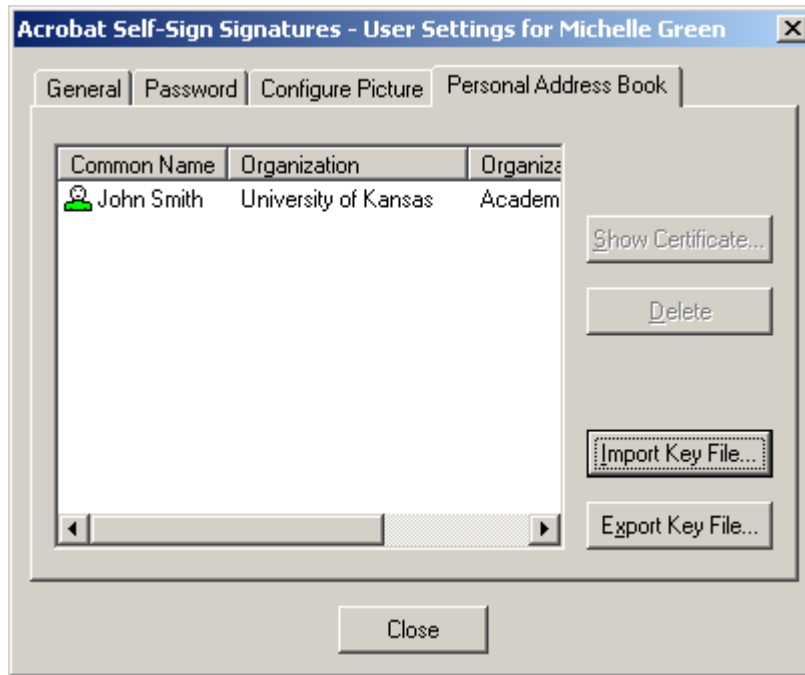
4. Locate the Key File you wish to import and double-click it.



5. Note the validation string and compare it to the one sent to you with the Key File. Click **OK**.



6. You should see the name of the person whose key file you just imported in the Personal Address Book. Click **Close**.



## For More Information

Here are some additional sources of information about Adobe Acrobat and PDF files:

### Print

#### Acrobat 5.0

*Adobe Acrobat 5.0 Classroom in a Book* by Adobe Creative Team (Adobe 2001)

*Adobe Acrobat 5 PDF Bible* by Ted Padova (IDG 2001)

*PDF with Acrobat 5: Visual Quickstart Guide* by Jennifer Alspach (Peachpit Press 2001)

#### Acrobat 4.0

*Adobe Acrobat 4.0 Classroom in a Book, 2<sup>nd</sup> Edition* by Adobe Creative Team (Adobe 2000)

*Acrobat PDF and Workflow In Detail* by Frank Romano (Prentice Hall 2000)

*Acrobat<sup>®</sup> PDF Bible* by Ted Padova (IDG 1999)

*Postscript and Acrobat/PDF Bible: Applications, Troubleshooting, and Cross-Platform Publishing* by Thomas Merz (Springer Verlag 2001 – not available until Feb. 2001)

#### Acrobat 3.0

*Web Publishing With Acrobat/PDF* by Thomas Merz (Springer Verlag 1998)

*PDF Printing and Workflow* by Frank Romano (Prentice Hall 1998)

### Online

*Adobe Acrobat Help* (the online manual included with Acrobat 4.0)

Adobe CustomerFirst Support (<http://www.adobe.com/support/main.html>)

*Internet Publishing with Acrobat* by Gordon Kent (full text online at <http://www.imagebiz.com/ipwa/open.html#1>)

PDFzone (<http://www.pdfzone.com/index.asp>)

Planet PDF (<http://www.planetpdf.com>)

## Getting Additional Help

ACS provides consulting and Q&A help in a variety of ways:

785/864-0200

[question@ku.edu](mailto:question@ku.edu)

[www.ku.edu/acs/help](http://www.ku.edu/acs/help)

*Last Update: 04/16/2003*