Revu Tutorial: Creating Forms

Bluebeam PDF Revu eXtreme makes it possible to quickly and easily generate forms. There are several ways to extract the data from forms and use that data in other applications for further processing.

Create a Form

To begin, go to *Form/Edit Fields* (Ctrl +Shift +F*)*. This will put you in **Edit Forms Mode**. Once in this mode, you can add the following fields to your PDF document: Text Box, Radio Button, Check Box, List Box, Dropdown, Button, and Digital Signature.

Text Box - Used to store text, dates, numeric values, email addresses, etc. The data in a Text Box is represented as a string or number. Additional JavaScript processing may be done to convert the text values to Date or Boolean values.

Radio Button - Used to select one of many options. By default, Radio Buttons are in a state in which nothing from the group is selected; however, once one of the options is selected, the Radio Buttons go into a state in which at least one of the options is always selected.
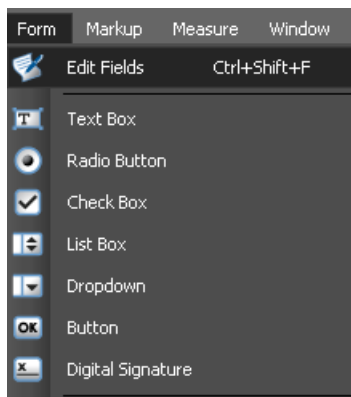
Check Box - Used to select or unselect one option. Multiple Check Boxes can be placed near each other to indicate a set of options which are mutually exclusive to each other.

List Box - Used to select one or more items from a list. Once the items are selected, additional processing on the items can be done using JavaScript.

Dropdown - Used to select from one of many items. This option can also allow the user to specify a new option not in the list.

Button - Used to initiate a calculation, sequence of events, validation of fields, generation of data, etc.

Digital Signature – Used to securely sign the document electronically. (See the Digital Signatures tutorial for more information).
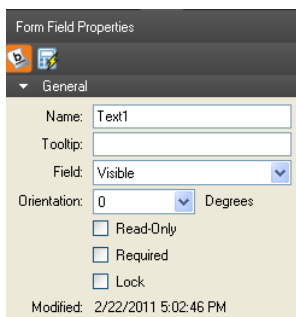
Using the Field Properties Panel

When in **Edit Forms Mode** (Ctrl + Shift + F), selecting an existing form field in the Forms tab accesses the Form Field Properties panel. This is where all the properties may be set for a field.

General

The **General** panel displays generic properties that all form fields have.

Name: Identifies the field. Names do not have to be unique, and they are commonly used to access the field object in JavaScript.

Tooltip: Text that will display when the mouse hovers over the field.
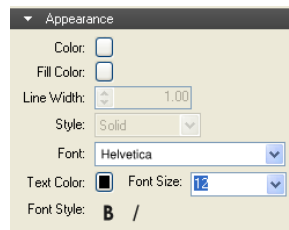
Field: Specifies the print and document visibility. For example, Visible means the form field will be both visible in the PDF and visible when printed.

Orientation: Sets the angle at which the contents of the field will be rendered. There are four options: 0 degrees, 90 degrees, 180 degrees, or 270 degrees.

There is also the option to make the field **Read-Only**, which disables further user input, **Required**, which forces the user to enter in data before submitting, and **Lock,** so a user cannot change any of the field properties.

Appearance

The **Appearance** panel contains the style information for a field. All fields, except the Digital Signature field, have an Appearance panel. Here you can adjust **Color** (border color), **Fill Color** (background color), **Line Width** (border width), **Style** (border style), **Font**, **Text Color**, **Font Size**, and **Font Style**.

Layout

The **Layout** panel contains the position and size properties about a field, which is quite useful to position and size a field with great precision.

Options

All fields, except for the Digital Signature field, have an **Options** panel. Each type of field has its own set of options. Options include setting the **Alignment, Default Value**, **Multi-Line**, **Scroll Long Text**, etc. To find out more about creating forms, go to the **Revu eXtreme Forms Help Guide**.