Chapter 8

Exploring the Acrobat Interface

Getting around the Acrobat tools and menus

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Acrobat is a complex application that serves the needs of several industries. You find tools for comment and review, professional printing, legal services such as redaction, scanning and OCR recognition, conversion methods for documents and web pages, editing PDFs, working with interactive elements, encryption tools, searching, spell checking, signing documents, comparing documents, exporting content and more.

Fortunately for forms designers you don't need to learn all the various features in the program to create sophisticated, dynamic, and complex eForms.

Working with Preferences

The very first thing you need to do after launching Acrobat XI is visit the application Preferences. You find many toggles and switches in a long list of preferences in Acrobat. Most important are preferences located in the General and Forms categories.

Launch Acrobat and open the preferences by pressing the CTRL (Windows) or the Command (Mackintosh) key + K for a keyboard shortcut. Alternately you can open the Acrobat menu (Macintosh) and click Preferences or Edit menu (Windows) and click Preferences.

Setting General Preferences

The Preferences window opens and you find a list on the left side of the window with Categories listed. Click General in the left pane and the right pane changes. Click the check box where you see *Use single-key accelerators to access tools*.

Checking this box enables you to use keys on your keyboard to access tools. It will take some time to remember all the keyboard shortcuts but there are a few you can easily commit to memory that help speed up your work in Acrobat. These include:

✦ **Hand tool (H).** After you check the item in the preferences, individual keys you press on the keyboard select a tool. When pressing the H key the Hand tool is selected. You use this tool to move a document around the document pane. If

you zoom in on a form, you see only a portion of the form in the Document pane. Click and drag the Hand tool around the page to move the page content within the document pane. Additionally, when you fill-in form fields, you use the Hand tool.

✦ **Select Object tool (R).** As the name implies, you select objects with this tool. A field is an object. You can use the Select Object tool to select field objects for copying/pasting, resize field objects, manage fields by aligning and distributing, and double-clicking a field to easily access a field's properties. This is perhaps the most essential tool you find for authoring forms.

Just remembering these two tool keyboard accelerators can help you work much faster in Acrobat when designing forms. The remaining items in the General Preferences pane can be learned as you become more knowledgeable about Acrobat and other features in the program.
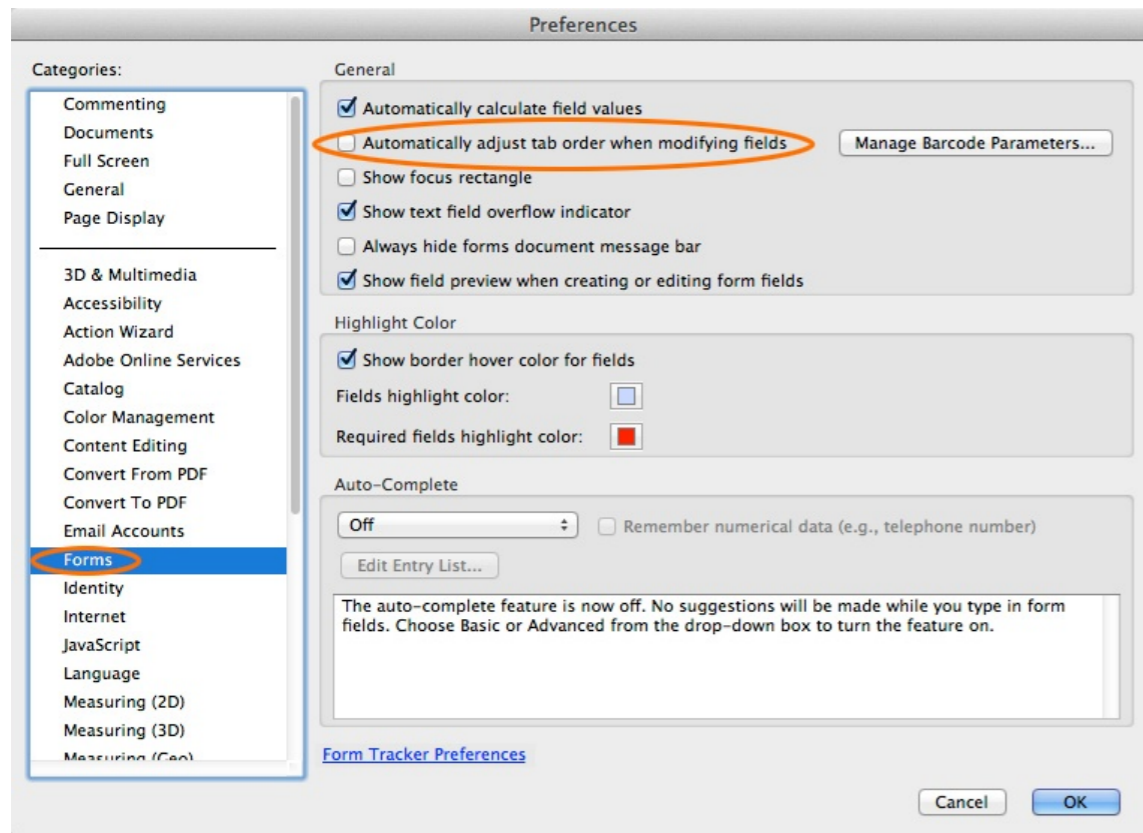
Setting Forms Preferences

Acrobat provides a special category in the Preferences for toggles and switches related specifically to forms. In the left pane click Forms and the right pane changes to reflect options you have for setting forms preferences.

There is one item in this category that's paramount for forms designers and a new preference option that was introduced in

Acrobat XI. Click Forms in the left pane and notice the item denoted as *Automatically adjust tab order when modifying fields*. You must remove the checkmark for this preference item. If you leave this item checked, Acrobat will operate painfully slow when working on complex forms. Always keep this item unchecked. If you need to adjust tab orders on your forms you have many other alternatives I discuss in Chapter 10.

Figure 8.1 Forms Preferences

Press CTRL/Command + D. Click Forms in the left pane and remove the checkmark

The remaining items in the forms preferences are personal choices for viewing forms and fields. You can explore these items independently. For now, just realize the most important item to address is turning off the auto tab order setting.

Setting Language Preferences

If your forms are assembled in a language other than US English, you can click the Language item in the category list and choose a language from the Application Language drop-down menu.

The remaining preferences can be left at defaults when you installed Acrobat. As needs arise you can periodically visit the preferences to make changes. For help with preference choices you can open the Help menu and click Adobe Acrobat XI Pro Help.
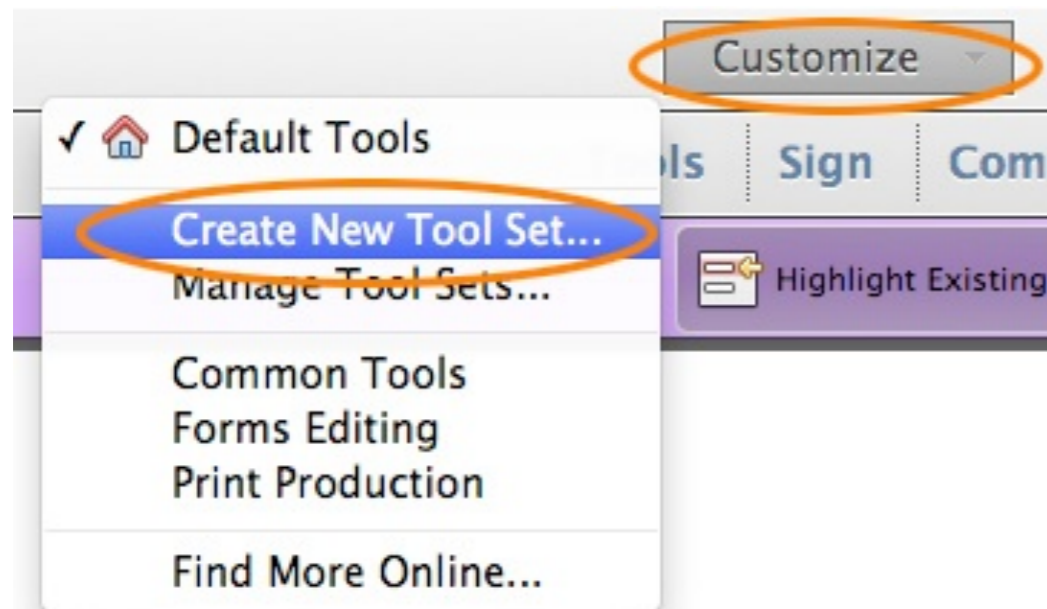
Adding Tool Sets

If you're familiar with other Adobe applications you know that most programs support creating Workspaces. A workspace is a collection of tools and menu choices that a user personally defines. You make choices for the contents of your workspace and save it. You can create additional workspaces and save each one independent of the others. If using a program like Adobe InDesign you might create a workspace for designing print documents and another for designing web documents. You might use tools that support CMYK color for print and RGB color for web and save to the respective workspace.

In Acrobat terms, workspaces are known as Tool Sets. You likewise determine what tools you want in a given tool set and save the set. You can likewise create several different sets. If you use Acrobat regularly and you work with reviewing documents and you also design forms, you might save two different sets of tools —one for Comment & Review and the other for Forms.

For our purposes we're talking about forms. Therefore, you'll want to create a tools set that contains all the tools you use when designing forms. To begin developing a tool set you start by clicking the Customize button in the top right corner of the Acrobat window to open a drop-down menu. Choose Create New Tool Set from the menu options.
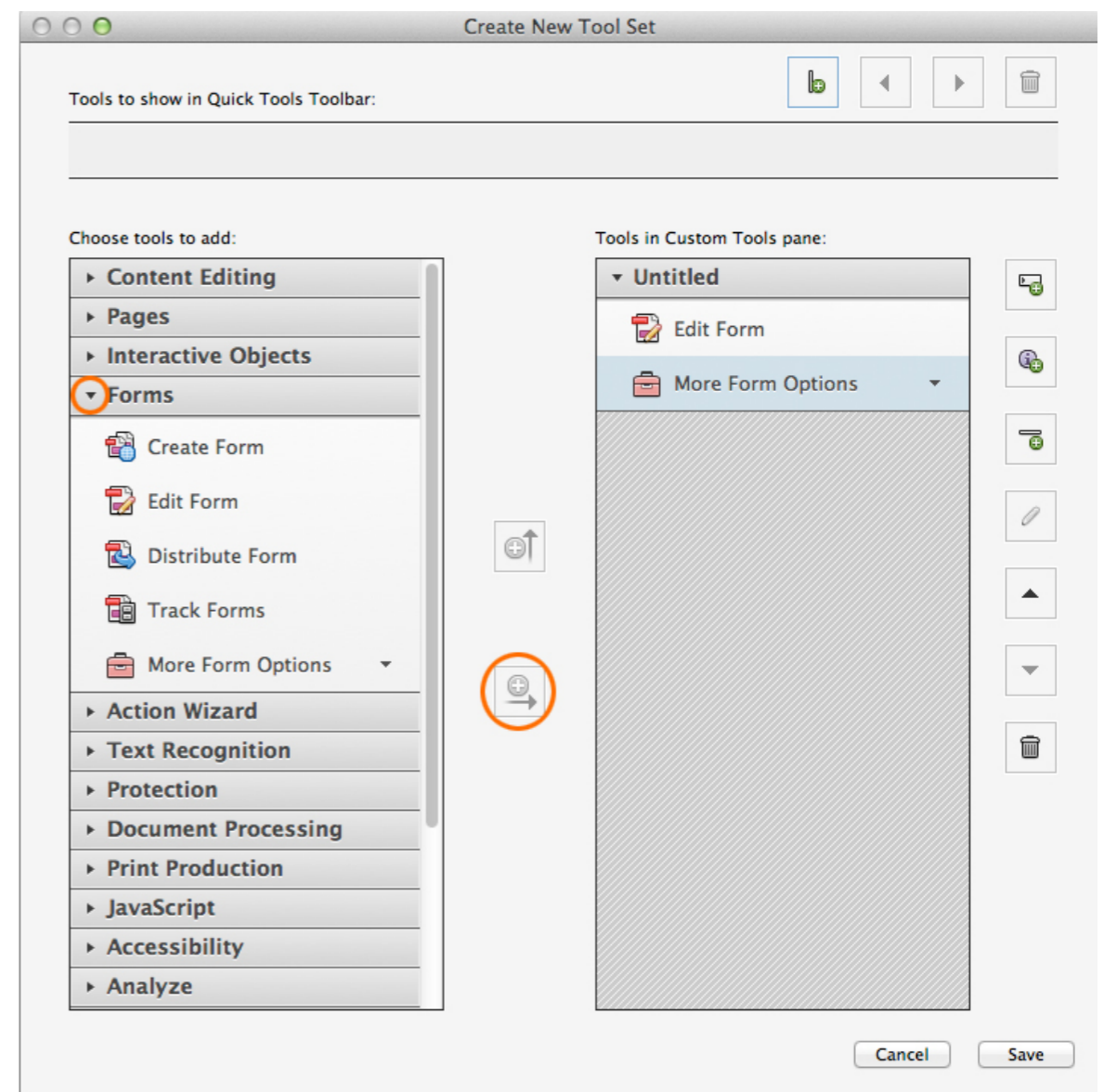
Figure 8.2 Create New Tool Set

Click Customize and choose Create New Tool Set

The Create New Tool Set window opens. Here you find a list of all available Acrobat tools listed in the left panel, and by default you find an empty panel on the right where you see the caption *Tools in Custom Tools pane*. The right pointing arrowheads adjacent to the tool categories in the left pane are used to expand/collapse a category.

Figure 8.3 Add Tools to New Tool Set

The Create New Tool Set Window

Obviously you want to add all the items listed in the Forms section. Click the right pointing arrow and click a tool in the list. To move the tool to the right pane, click the right arrow icon appearing between the two panes. Follow the same steps and add all the tools so they appear listed in the right pane.

Other tools you'll want to add to your Forms Editing Tool Set include:

✦ **Select Object tool:** You find this tool located in the Interactive Objects category.

✦ **Save:** This is optional if you happen to know the keyboard shortcut (CTRL/Command + S) to save and update a file.

✦ **Save As:** Likewise this may be an optional choice. This command is important when creating complex forms. You may want to save a copy of a form to test JavaScripts and formulas without disturbing your final form.

✦ **Replace:** This command is used for replacing pages. I use this command virtually every time I create a new form. I find there are many times I need to return to the original document, make some edits, and convert to PDF. If I add field objects on a form, I want the fields to remain but I want the background design with my new changes appearing on the form. If this is the case, I choose Replace and a dialog

box opens asking me to locate the file I want to use to replace the existing page or a range of pages.

 You find the Replace tool in the Pages category.

✦ **Insert from File:** Also included in the Pages category is the Insert Pages from File tool. You can use this tool to insert a blank page when you want to test calculations, JavaScripts, and button actions.

✦ **Page Templates:** Page Templates are used when you want to add new pages to a document that are spawned from template pages. I cover more on spawning pages from templates in Chapter 18.

 You find the Page Templates tool in the Document Processing category.

✦ **JavaScript:** Open the JavaScript category and add all the tools contained in this category.

✦ **Accessibility:** To comply with Section 504 in the USA you'll want to add accessibility to all your forms for USA government sites. You may need to do quite a bit of editing for tagging files properly, adding alt text, and insuring that the reading order is correct for screen readers. To add Accessibility tools, open the Accessibility category and add all the tools to the right pane.

For creating government eForms, the above listed items are the most important. Acrobat provides other tools that might be used by forms designers such as distributing a form to Office 365 or a Microsoft Sharepoint server. It's more likely though that in government offices you won't use the distribution choices from Adobe.

In the Save & Export category you find the Reader Extended PDF tool. Since you should require all users to upgrade to Reader XI, you won't need to enable PDFs with Reader Usage Rights. If, for some reason, you need to support the needs of Reader users below Reader XI, you may want to add this tool to the right pane.

Adobe has spent much engineering time and effort in simplifying the forms editing process and has tossed in some items such as the Create Form tool that takes you to Adobe Forms Central where forms can be designed from an assortment of templates. Again this is an item not likely used by government forms designers.

If you stick with those items recommended for adding to a Forms Editing tool set, you have all the essential tools necessary for designing dynamic forms.

If the order in the right pane in the Create New Tool Set window is not the order you want, you can select items in the right pane and click the up/down arrows to reorder the tools. When finished, click the Save button and your new tool set is added to the Customize drop-down menu.

Once you select a tool set, the tool set remains open in all your Acrobat work sessions. If you want to change to another tool set, just reopen the Customize menu and select another tool set.

Adding Tools to the Toolbar Well

Above the Document pane you find a number of tools in a toolbar spanning the width of the Acrobat window. A few tools not loaded by default can help when designing multi-page forms. Open a context menu (right click anywhere on the Toolbar Well or with a one-button mouse on the Macintosh, press Control and click to open a context menu) and choose from the menu *Page Navigation ➤ Previous View*. Return to the same menu and choose Next View. If you view a page such as page 1 in a document and jump to page 5 (or another page), click the Previous view tool to return to the page before the jump. This saves you time over manually scrolling pages.

If you find additional tools that work well for you, you can examine tools in a context menu and add them to the Toolbar Well in similar fashion.

Zooming Views

A common task when editing forms is zooming the view. You may want to zoom in on a field to precisely size a field box, then return to a Fit View to examine the entire form page.

You find the minus (-) and plus (+) symbols loaded in the Toolbar Well by default. Additionally you find a text box for typing a zoom view, a drop-down menu to choose fixed zoom views, and page icons for Fit Window to width and enable scrolling and Fit one full page to window. You have a number of other tools you can add for zooming views that can be added to the Toolbar Well.

Perhaps the easiest options for zooming views is just remember a few keyboard shortcuts. Using the shortcuts enables you to work much faster in Acrobat. The most important for zooming views include:

✦ **Ctrl/Command + (plus):** Press the Control key (Windows) or Command key (Macintosh) and the plus (+) key to zoom the view.

✦ **Ctrl/Command - (minus):** Press the Control key (Windows) or Command key (Macintosh) and the minus (-) key to zoom out.

✦ **Ctrl/Command 0 (zero):** Press the Control key (Windows) or Command key (Macintosh) and the zero key to zoom to a full-page view.

Try to commit these shortcuts to memory and you can quickly zoom in and out of pages in the Document pane.
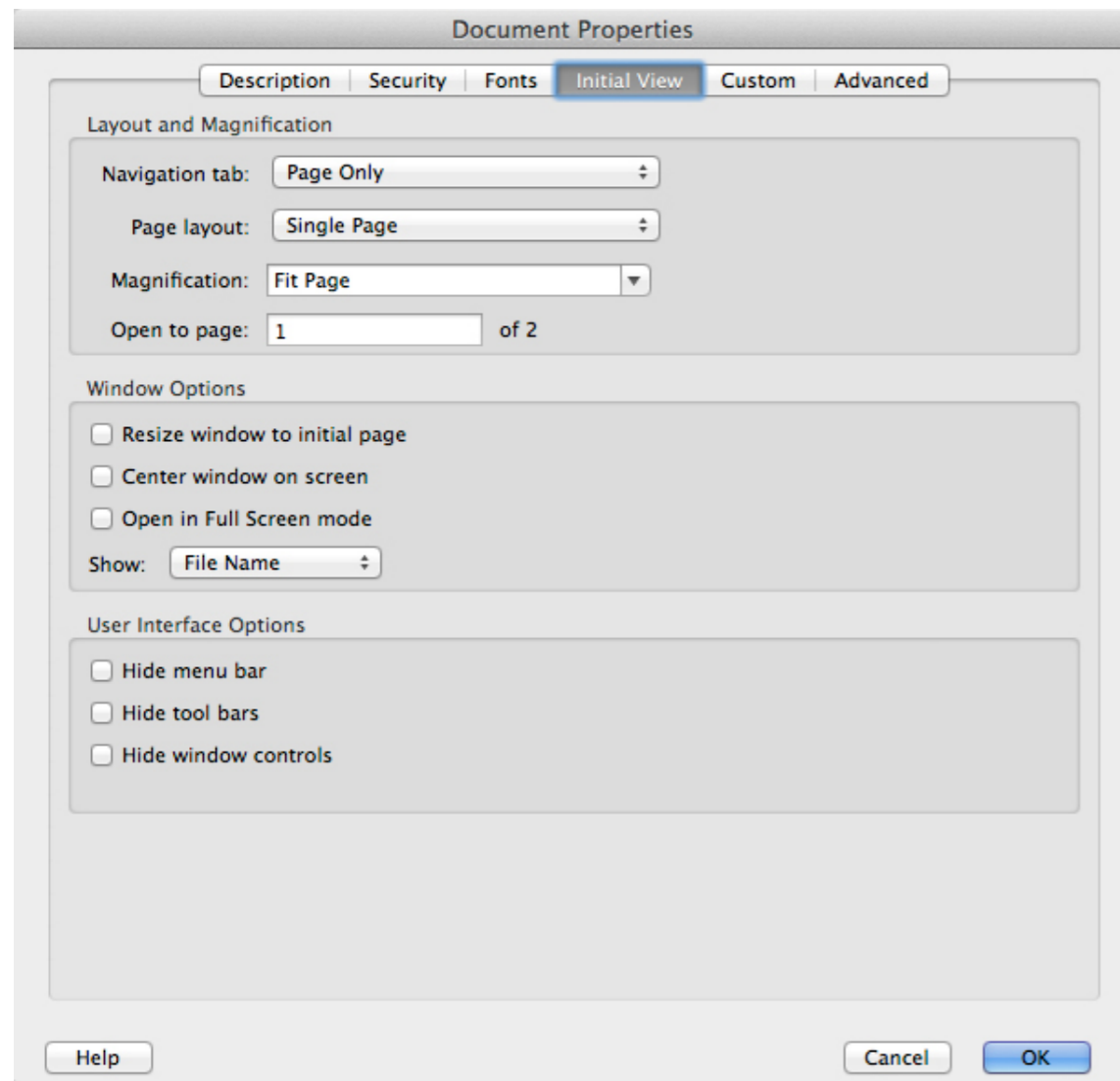
Setting Initial Views

An initial view is the zoom view when a document is opened in Acrobat or Reader. The view can also show or hide toolbars and show or hide panels. You can make choices for how you want constituents to view your form when the file is opened.

The toggles you set are strictly subjective. You may want all your forms to appear zoomed in so the form filler can clearly see the fields on small monitors. You could also set the view to Fit Width so the form zooms to a screen width. Another choice is to Fit View where an entire page is shown when the file opens. Regardless of the choice you make this item requires some discussion in a staff meeting and some standards should be set forth so all forms hosted by your government office are set to the same zoom view.

Setting the opening view is handled in the Initial View window. To access the Initial View settings, choose *File ➤ Properties* or press CTRL/Command + D. When the Document Properties window opens, click the Initial View tab.

Figure 8.4 Initial View Properties

Set the Initial View for forms that you want appear as the default view when the form is opened.

When you first open the Initial View window you find a number of drop-down menu items are set to Default. Be certain to override all the Default choices. The Default choice pertains to Preference choices made by individual Reader users. Some users may have defaults set to open Fit Width, some to Fit Page, and others to Automatic. The result is that your document is displayed

differently on different computers according to the preference choices each user makes.

Default views would be fine if all Adobe Reader users knew they could change a viewing preference. However, most users are not aware of the toggles. It may be best for your department to make the choice for what viewing option is best for most users. Experienced users can always change the view once inside Reader or Acrobat using keyboard shortcuts and tools.

In the Initial View window you have several choices to make that can help the viewing experience for users. These include:

✦ **Navigation tab:** Typically you might set this option to Page only. However, if you have bookmarks created for long forms, you may want to choose Bookmarks Panel and Page from the Navigation tab drop-down menu. You may have some forms that are multi-lingual and the different languages may be on separate layers in your form. If this is the case you may want Layers Panel and Page opened when the user views the file in Reader. Again, you make the choice in the Navigation tab drop-down menu.

✦ **Page Layout:** Should the form be viewed as a single page or should continuous pages be enabled? I personally prefer using a single page view. When viewing pages in this view, the entire page snaps to view. When you scroll pages each page snaps to a view in the Document pane. If you choose

Single Page Continuous, users can scroll pages without snapping to a full page. In essence, one can see the bottom half of the top page and the top half of the bottom page in the Document pane. This can be an advantage for a user if they need to see a previous set of fields that might be helpful in completing the next set of fields appearing on a following page.

Page layout is another subjective judgment and warrants discussion in a committee meeting for standardizing forms.

✦ **Magnification:** This is where you set the open default zoom view. You have several choices from the Magnification drop-down menu. Make a choice that is the standard for your government office.

✦ **Open to Page:** By default, the number is set to 1 where the first page in the file appears in the Document pane when a file is opened. You may want to change this item to open another page where a user may logically start but the form is best viewed after populating a form from page one.

As an example, I created a health statistics form for the Botswana Africa Ministry of Health. The form opened page 225 where a registration card for a new in-patient was recorded. However the important part of the form was the discharge information that resided on page 2.

Discharges occurred after the registrations. When a patient was discharged the data from the registration card was transposed to the patient discharge form. Data always had to be sent from the registration card to the discharge form. There was no way to populate registration information manually on the discharge form. Hence, since registration cards were always viewed first, either to add a new patient or discharge a patient, it made sense to open the PDF on the registration card page first —page 225.

In terms of the design for this example, I could have designed the document with the registration cards appearing at the beginning of the form and the discharge at the end of the form. However, the registration cards were an afterthought when the health professionals met and requested additional information on the form. Extensive JavaScripts and calculations were made that referenced page numbers so it was much easier to modify the form by adding registration cards at the end of the form. All of this was transparent to the workers since pages opened automatically when data were transposed.

✦ **Window Options:** For eForms, all these items should be left unchecked and at defaults.

✦ **User Interface Options:** You can choose to hide items listed in this section. You may want to avoid hiding menu bars. Users may want to work with menu commands for saving and closing your forms. Hiding tool bars and window controls provides more real estate for users to work with forms. For eForms, the tool bars and window controls may be unnecessary for most forms. If you do choose to hide items, be consistent for all forms your agency deploys.

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