Creating Online Forms

InDesign provides tools for creating online forms. These are exported to Adobe Acrobat as a PDF file and can be used to collect information from users. The information entered into the form can be sent to a web site or as an attachment in an e-mail address.

Loading the Prepared File

The form labels have been prepared for you and the fields will need to be entered to complete the form.

1   Load InDesign or close the current documents then select OPEN from the WELCOME screen or FILE menu.

2   Access the IDcc SUPPORT FILES, open the CHAPTER 20 folder and open the FORM document.

3   Use SAVE AS from the FILE menu to save the document in your STORAGE folder as:
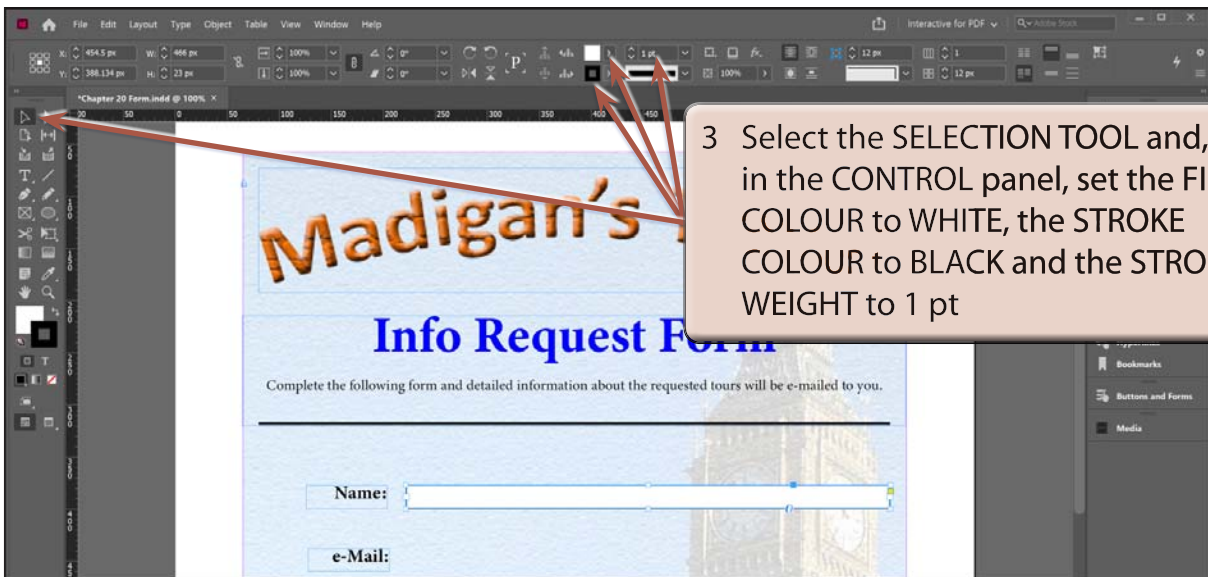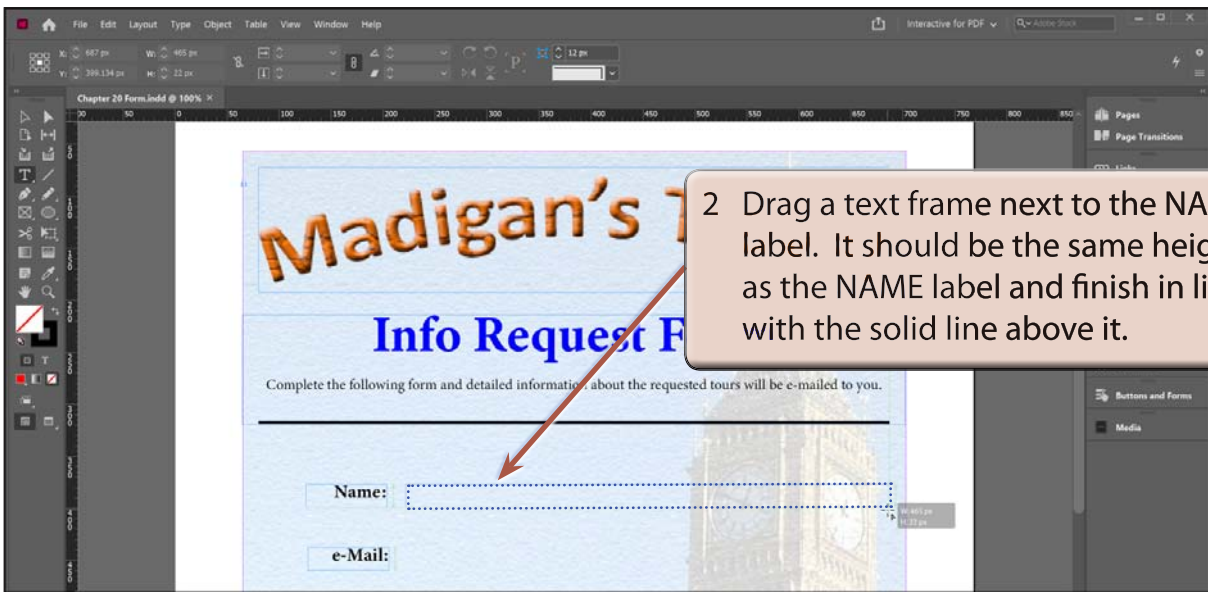
Chapter 20 Form

Adding Text Fields to the Form

The most common field in a form is a TEXT field. It simply allows users to enter data such as names, addresses, comments, etc.
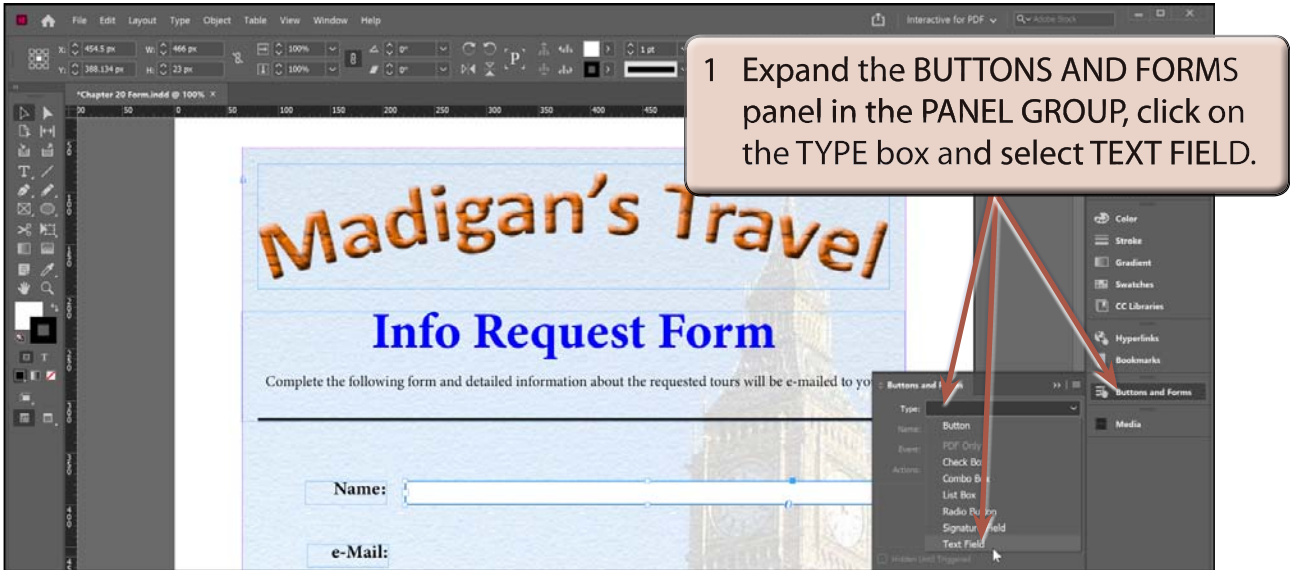
A   Inserting a Text Frame

1 Set the screen to the INTERACTIVE FOR PDF workspace, set the ZOOM to 100% and select the TYPE TOOL in the TOOLS panel.

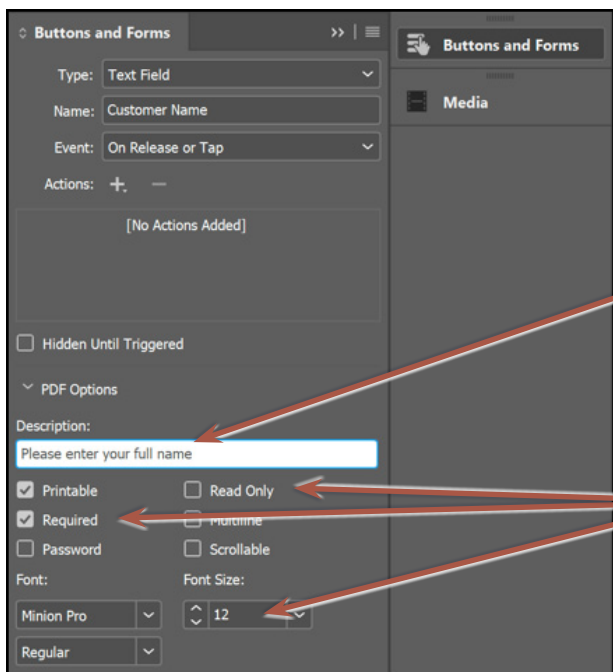2 Drag a text frame next to the NAME label. It should be the same height as the NAME label and finish in line with the solid line above it.

3 Select the SELECTION TOOL and, in the CONTROL panel, set the FILL COLOUR to WHITE, the STROKE COLOUR to BLACK and the STROKE WEIGHT to 1 pt

B　Creating the Text Field

The text frame now needs to be converted into a text field.

1　Expand the BUTTONS AND FORMS panel in the PANEL GROUP, click on the TYPE box and select TEXT FIELD.

NOTE:　**A text frame can also be converted to a text field by displaying the OBJECT menu, highlighting INTERACTIVE and selecting CONVERT TO TEXT FIELD.**

2　In the BUTTONS AND FORMS panel set the NAME box to CUSTOMER NAME and press <enter> or <return>.

3　No ACTIONS need to be set as this is a FIELD that just collects data, not a BUTTON that executes something.
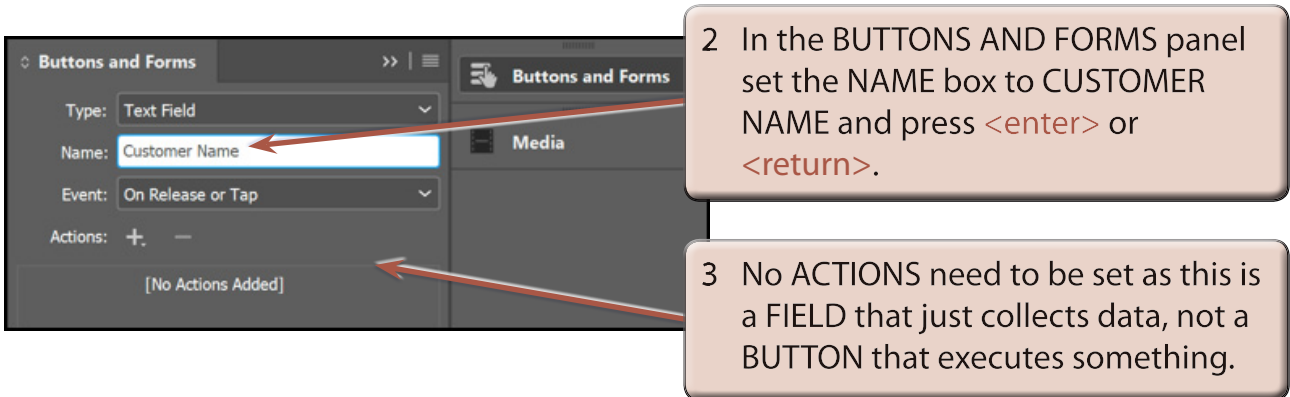
4　The PDF OPTIONS need to be set.

5   Set the DESCRIPTION box to:

Please enter your full name

6   Leave PRINTABLE selected, turn
    on REQUIRED, turn off the other
    options and leave 12 pt selected in
    the FONT SIZE box

NOTE: **i** **The DESCRIPTION will appear as a tool tip when a user hovers their mouse pointer over the field in Acrobat Reader.**

ii **Turning on REQUIRED means that the field must have data entered into it before the form can be submitted.**

C   Duplicating a Text Field

The previous steps could be repeated to add an e-mail text field, but it is easier to duplicate the NAME field and adjust its settings.

1   Hold down the ALT or OPTION key
    and drag the text field straight down
    to the E-Mail label.