October 24, 2014

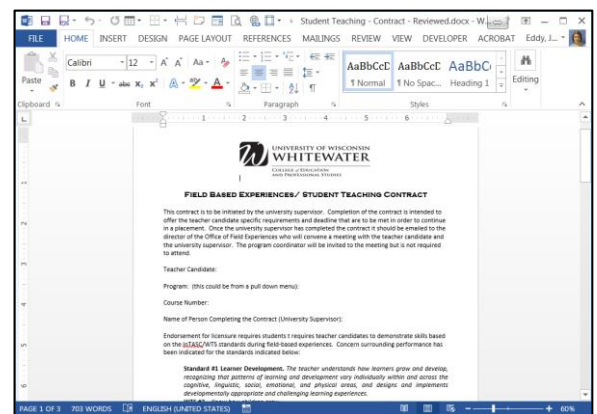# Adobe Fillable Forms

OVERVIEW

This guide will walk you through the steps to create, edit, and lock an Adobe fillable form.
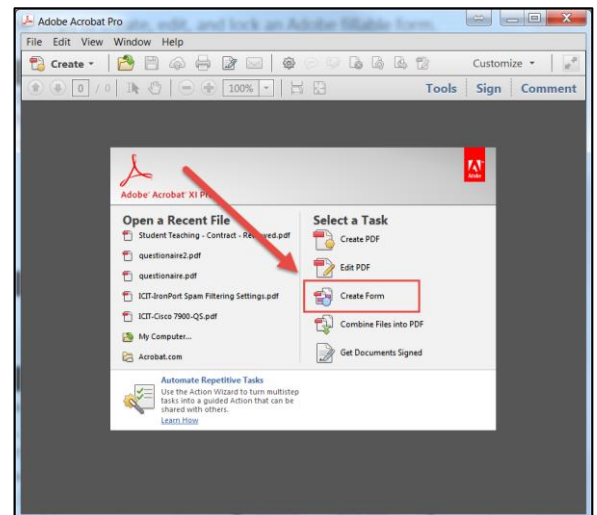
Step 1

Create the basic format of your form using Microsoft Word. Make sure to leave enough space in between lines where form fields will be needed.

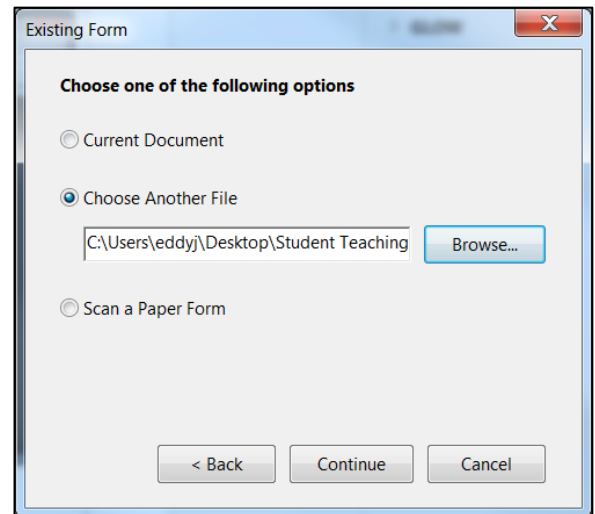
Step 2

Open Adobe Acrobat XI Pro.
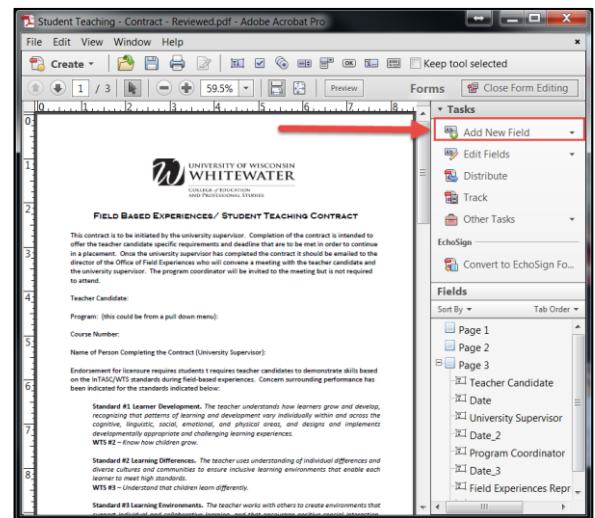
Select **Create Form.**

Step 3

Choose "From Existing Document", then click **Next.**

Locate the Word document that you would like to make a fillable form, then click **Continue**.
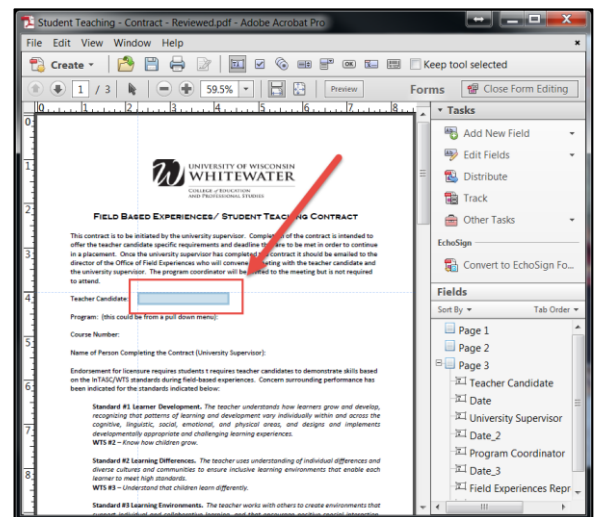

Step 4

From the toolbar on the right, click "Add New Field", then select the type of fillable field you wish to create.

Step 5

Place your mouse pointer in the location you wish to place your fillable field, then click on the screen to place the field.

Step 6

Enter a field name for your box. Typically this would be a description box like "Enter name here" or "Select an option".

You can modify the field box size by clicking on the field box so that it has dotted lines around it, then click and drag a dot to make the field box bigger or smaller.

Step 7

Repeat steps 4 – 6 until you have placed all of your field boxes in the correct location.

NOTE: Double-click on a field box to open the properties box. This will allow you to configure settings such as text size, max number of characters, enter in options for a dropdown box, etc.

Step 8

Once you have placed all of your field boxes where you would like them to stay, click the **Close Form Editing** button to see what the form looks like from a user perspective.

Go ahead and fill out your form as a user would to make sure you are happy with each field's placement.

To get back into edit mode, click the **Tools | Forms | Edit** button.

To see what the user sees, click the **Close Form Editing** button like step 8.

To lock your form so that users can only fill out your form, click the **Protection** tab in the right side toolbar, then select **Restrict Editing**.

Enter the same password in both fields, then click the **OK** button to save the password.

You will receive a popup message that your settings will not be saved until you save and close out of your form. Please save your form as a PDF file, then close your form completely.

Step 10

Reopen your new PDF form document to verify that users are unable to edit any field boxes on your form.

If you need to make changes to your locked form, click the lock icon in the left side toolbar.

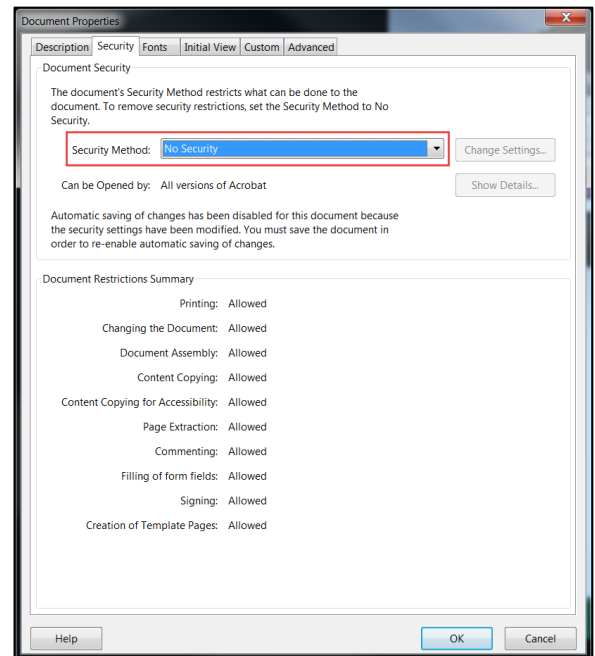UNIVERSITY OF WISCONSIN
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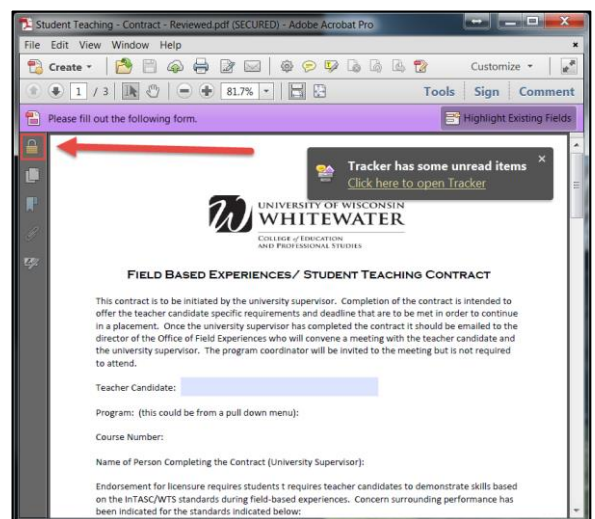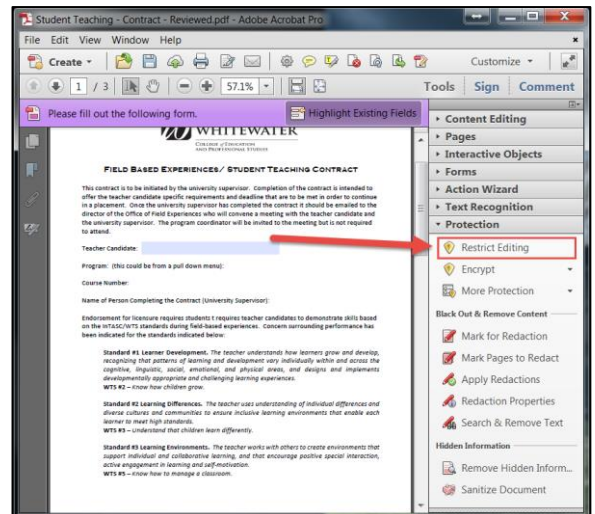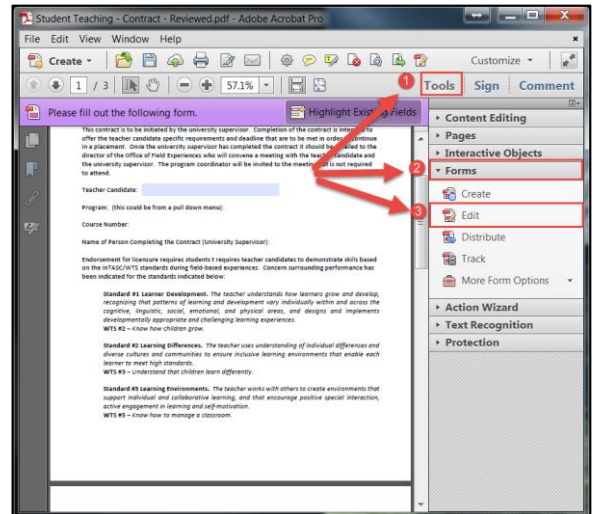
Step 11

Click the "Permission Details" link.

Set your "Security Method" to "No Security".

Enter the password you set from step 9.

Click the **OK** button to continue.

Click the **Tools | Forms | Edit** button in the right side toolbar to make changes to your form.

Helpful Tips:

- **Dropdown Boxes:** To enter in values for a dropdown box, double-click on the box to open the field's properties. Next, select the "Options" tab. Enter a value in the "Item" box, then click the **Add** button to add the value. Repeat the steps above to add additional values to your dropdown box. Click **Close** when you are done.

- **Clear Filled in Fields:** While testing your field boxes you may want to quickly clear all of your form fields to get back to a blank form. You can easily do this by selecting **Tasks | Other Tasks | Clear Form** from the toolbar on the right-hand side.

Need Additional Help?
Email helpdesk@uww.edu