

# Generating lesson plans with Adobe Acrobat

## Introduction

Being a teacher requires so many non-teaching administrative tasks that sometimes just teaching gets lost in the paper shuffle. You can automate a number of those paper-based tasks by going digital with Adobe® Acrobat® 9 Pro. In this guide, you learn to use Acrobat forms to simplify the generating of weekly lesson plans. And you can apply what you learn here to other repetitive tasks as well.

This section shows you how to create a lesson plan template by using a PDF form in Acrobat. A PDF form offers several advantages over a word-processing document or spreadsheet:

- Updating the form is easy.
- Form elements and non-form elements are separate, so adding information to the form doesn't disturb the layout of the form as it frequently does in word-processing documents and spreadsheets.
- Layout is easier because you can place form fields anywhere without disturbing other elements on the page.
- You have a wide range of form fields available.

For your lesson plan template, you will collect most of the information in text fields. In some cases, however, one of the other types of fields may be useful. Acrobat provides a variety of form inputs (**Figure 1**).

**Ocean View High School**  
 300 West Coast Blvd.  
 Ocean View, CA, 94004  
 (555) 555-5555

**Student Record Form**

Text field: First name: Middle name: Last name:

List box: Date of Birth: December 10 2001

Radio buttons: Gender:  Male  Female

Combo box: Heritage (optional or add your preference): Hispanic

Check boxes: Does your child have one or more of the following?  
 Gifted and Talented  
 Speech or Language Impairment  
 Other Health Impairment  
 Autism

**Figure 1** Acrobat form fields

- **Text fields:** Let the user type text, such as name, address, or phone number.
- **List boxes:** Display a list of options the user can select. If the list is longer than space allows, the user can scroll through the list.
- **Check boxes:** Present yes-or-no choices for individual items. If the form contains multiple check boxes, the user can typically select as many or few of these as wanted
- **Radio buttons:** Present a group of choices from which the user can select only one item. All radio buttons with the same name work together as a group.
- **Combo boxes:** Let the user either choose an item from a pop-up menu or type a value.

You can make changes to individual form field properties, such as providing default values for form fields or validating user input. You thus assure that the user has entered valid information into the form field so filling in the PDF form is even easier and more foolproof.

If you are new to Acrobat, see “Creating electronic portfolios with Adobe Acrobat,” which includes an overview of Acrobat and instructions for converting files to PDF format.

### Creating the form

You can use Acrobat to create forms by using one of the following methods:

- Convert an existing electronic document (for example, an Adobe PDF, Microsoft Word, or Excel document) to a PDF form. (In Mac OS, you can only convert an existing PDF file.)
- Scan a paper form to convert it to a PDF form.
- Create a form from scratch or from a template by using Adobe LiveCycle Designer ES. LiveCycle Designer is a graphical form design tool that contains advanced features and controls. It is a stand-alone application included with Acrobat Pro or Acrobat Pro Extended for Windows.

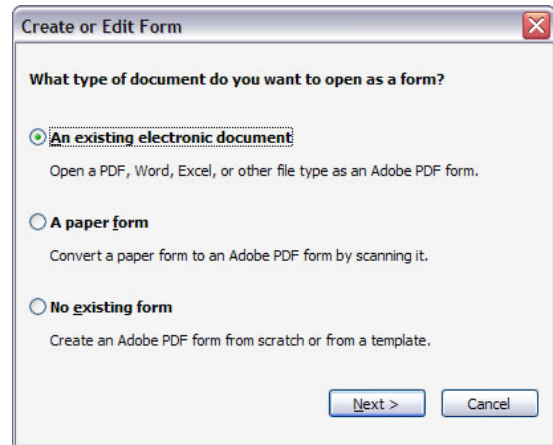
In this section, you learn how to create a form by converting an existing electronic document. For more help on the other methods, see the “Forms” section in Acrobat online help or visit the Acrobat in Education blog at <http://blogs.adobe.com/acrobatineducation/>.

#### To convert a form to PDF

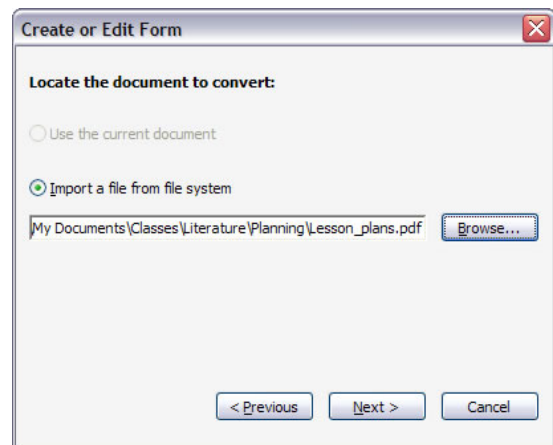
1. Start Acrobat.
2. Choose Forms > Start Form Wizard.

The Create or Edit Form wizard appears (**Figure 2**), asking what type of document you want to open as a form.

3. In the Create or Edit Form wizard, select An Existing Electronic Document. Then click Next.
4. In the next pane of the wizard (**Figure 3**), you indicate which document to convert. Make sure Import A File From File System is selected.
5. Click the Browse button and locate the file you want to open. Back in the wizard, click Next.



**Figure 2** Create or Edit Form wizard – Indicate the type of document to convert



**Figure 3** Create or Edit Form wizard – Locate the document to convert

- Acrobat processes your document, analyzing it for areas that appear to be form fields. Then it opens the converted document with suggested form fields.

The Welcome To Form Editing Mode dialog box also appears (Figure 4), reminding you to review your form and add any fields Acrobat may have missed.

- Click OK to close the Welcome To Form Editing Mode dialog box.

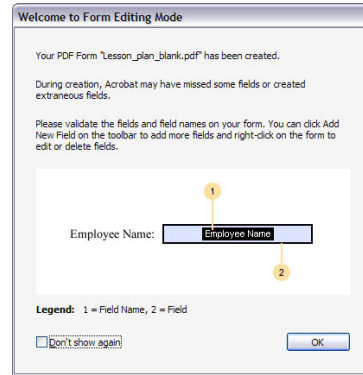


Figure 4 Welcome To Form Editing Mode dialog box

Once your form has been converted, you see your lesson plan template in form-editing mode, with the form fields listed in the Fields navigation panel on the left (Figure 5).

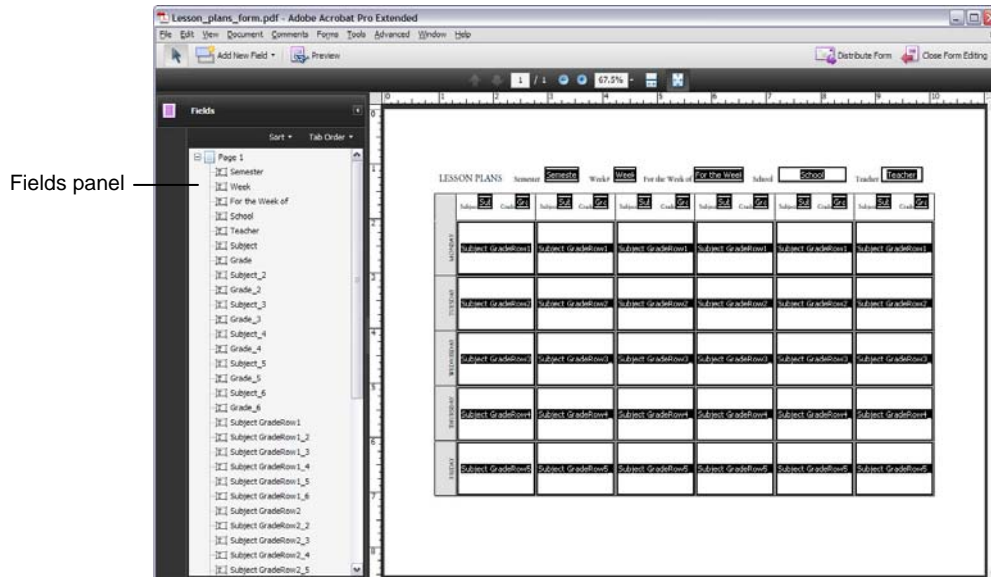


Figure 5 Converted lesson plan in form-editing mode

### Adding fields to the form

In form-editing mode, you see several controls (Figure 6) at the top of the Form Editing workspace.



Figure 6 Form Editing controls

- Selection tool:** With this tool selected, click an object on the form to select it; double-click to edit it.
- Add New Field menu:** Select the type of form field to place in the form.
- Preview:** See how your form will look to your audience when they fill in the form.
- Distribute Form:** Send this form to other people to fill in.
- Close Form Editing:** Stop editing the form.

After you convert your lesson plan to a PDF form, review it to make sure it contains all of the fields you require. To add fields, follow these steps:

**To add a field to a PDF form:**

1. Make sure the form is in editing mode. If not, select Forms > Add Or Edit Fields.
2. Click Add New Field to display the Field Type menu (Figure 7).
3. Select a field type, such as Text Field.

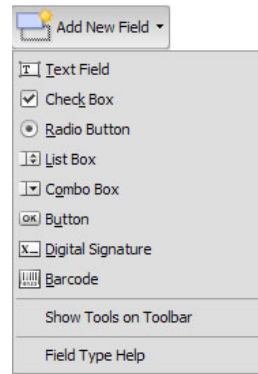


Figure 7 Field Type menu

4. On the page, click where you want to add the field to create a field with the default size. To create a field with a custom size, drag a rectangle to define the size of the field.

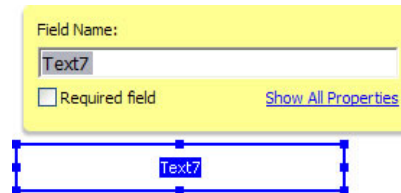


Figure 8 New text field

The field appears on the form, along with a Field Name box (Figure 8).

5. In the Field Name box, type the name of the field and specify if you want the field to be required. Choose a name that is relevant and descriptive to make organizing and collecting the data easier.

The field name should be unique (that is, different from all other field names in the form).

6. Click in the form (away from the new field) to deselect the field.

You can delete a field by selecting it and pressing Delete.

**Formatting form fields**

You can modify the fields in your lesson plan template in a number of ways. The Field Properties dialog box has four tabs (General, Appearance, Options, and Actions) in which you can format the text in form fields, add borders to form fields, set default values, limit the number of characters allowed, and so on.

**To convert a form to PDF**

1. Setting the properties of several fields at once is often convenient. To select multiple fields, do one of the following:
  - To select all form fields of all types, choose Edit > Select All.
  - To select a range of form fields, click the first form field in the range, and then Shift-click the last form field. All form fields between the two form fields are selected.

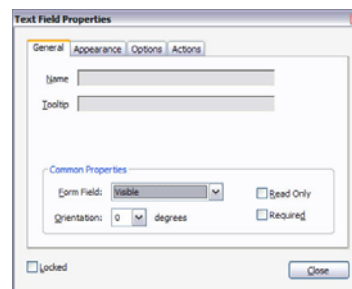



Figure 9 Text Field Properties dialog box

- To select individual form fields in different parts of the PDF page, Ctrl-click (Windows) or Control-click (Mac OS) each form field.
- To select all form fields in an area of the page, use the Select Object tool  to drag a selection marquee around the area.
- To deselect an individual form field, Ctrl-click (Windows) or Control-click (Mac OS) that field.

If you select multiple form fields that have different property values, some options in the Properties dialog box are not available. Otherwise, changes to the available options are applied to all selected form fields.

2. Select Forms > Show Field Properties.

The Field Properties dialog box appears (**Figure 9**).

3. Select the Appearance tab (**Figure 10**).
4. In the Borders And Colors section of the Appearance tab, choose a border color and a fill color for the form field.

Choosing colors for the form fields distinguishes the form fields from other elements in the form.

5. In the Text section of the Appearance tab, choose a font and a font size for the field text from the Font Size menu.

If you select Auto for the font size of a text field, the font size changes to fit the text in the box as the user types.

6. Select the Options tab (**Figure 11**).

The options on this tab change according to the type of form field selected.

7. In the Options tab, you can set a default (preassigned) value for the field; for example, in a text field, it is the text that appears until the user overwrites it by typing. Do this for fields that usually have the same value from one version of the form to another.

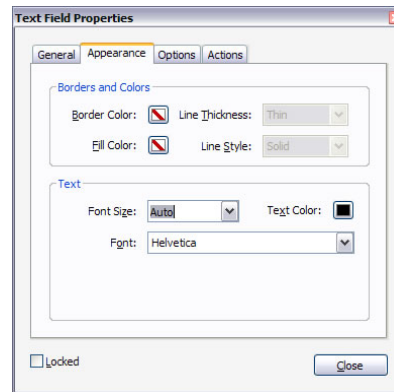
You can also set a limit on the number of characters allowed in a text field.

8. When you have set all of the properties you want, click Close.

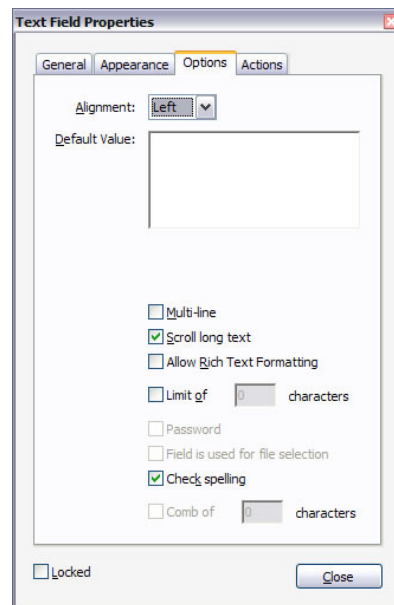
### Setting the form field navigation

Forms are easier to use if the user can navigate by tabbing from one form field to the next. The tab sequence should occur in an expected and logical order. Setting tab order correctly also makes the form more accessible to people with mobility impairments. After you create your form fields, you can set the tab order of the fields in your lesson plan template in several ways:

- In form-editing mode, you can order the tabs by document structure (default), row, or column.
- You can manually drag fields in the Fields panel.



**Figure 10** Appearance tab in the Field Properties dialog box



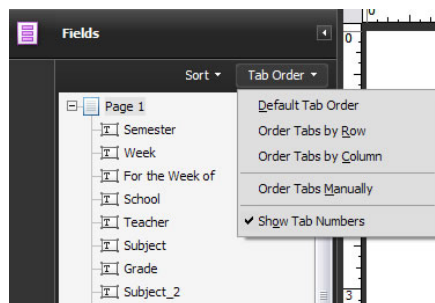
**Figure 11** Options tab in the Field Properties dialog box

- When not in editing mode, you can change the page properties to order the tabs by row or column.

We will show you how to set tab order in the form-editing mode.



### To set the tab order in form-editing mode:





1. If you are not in form-editing mode, choose Forms > Add Or Edit Fields.
2. In the Fields panel on the left, make sure you have selected Sort > Tab Order.
3. (Optional) To view the tabbing order for the fields, do one of the following:
  - Choose Forms > Edit Fields > Show Tab Numbers.
  - In the Fields panel, display the Tab Order menu and select Show Tab Numbers (**Figure 12**).
4. Select a Tab Order option:
  - **Default Tab Order:** Based on the document structure and follows the order you set up in the tagging.
  - **Order Tabs By Row:** Starts with the upper left field, moving first left to right and then down, one row at a time.
  - **Order Tabs By Column:** Starts with the upper left field, moving first from top to bottom and then across from left to right, one column at a time.
  - **Order Tabs Manually:** You can drag a field where you want it within the Fields navigation panel. You can only move one field at a time. You can't move a field to a different page, a radio button to another group, or a field to a radio button.





**Figure 12** Tab Order menu


## Using the form

After you create a lesson plan template as a PDF form, users can fill in the form with the Hand  tool or the Select  tool from the Select & Zoom toolbar. When users place the pointer over a form field, the pointer icon changes to one of the following:

- **Pointing Finger**  or **Pointing Hand Plus** : Appears when the pointer is over a button, radio button, check box, or item in a list.
- **Arrow** : Appears when users can select an item in a list of options.
- **I-beam** : Appears when users can type text into the form field.

### To fill in a form:

1. Make sure either the Hand tool  or the Select  tool is selected.
2. (Optional) To make form fields easier to identify, click the

Highlight Fields button  on the document message bar. Form fields appear with a colored background (light blue by default), and all required form fields are outlined in another color (red by default).

3. Click in the first form field you want to fill in, either to select that option or to place an I-beam pointer in the field so you can start typing.
4. After making a selection or entering text, do any of the following:
  - Press Tab or Shift+Tab to accept the change to the contents of the form field and go to the next or previous field.
  - Press the Up Arrow or Left Arrow key to select the previous radio button in a group of radio buttons, or press the Down Arrow or Right Arrow key to select the next radio button.
  - Press Esc to reject the change to the contents of the form field and deselect the current form field. If you're viewing the form in Full Screen mode, pressing Esc a second time causes you to exit Full Screen mode.

**Note:** If the current form field is a single-line text field, you can press Enter or Return to accept your typing and deselect the field. If the current field is a check box, pressing Enter or Return turns the check box on or off. In a multi-line text form field, pressing Enter or Return creates a paragraph return in the same form field. In all cases, you can press Enter on the keypad to accept the change and deselect the current form field.

5. After you fill in the form fields, do one of the following:
  - Choose File > Save As, and rename the file to save the form with the data you entered.
  - Print the form.

### Enable Reader users to save form data

Most people use the free Adobe Reader to fill in forms. Ordinarily, Adobe Reader users can't save filled-in copies of forms that they complete. However, you can extend rights to Reader users so they can do so. These extended rights also include adding comments, using the Typewriter tool, and digitally signing the PDF.

To extend these rights, open the lesson plan template, and choose Advanced > Extend Features In Adobe Reader.

These extended privileges are limited to the current PDF. When you create a different PDF form, you must perform this task again if you want to enable Reader users to save their own filled-in copies of that PDF.

### Conclusion

You can use PDF forms to automate many tasks, such as building rubrics, keeping digital records, gathering data for surveys, collecting information from students (such as field trip forms), and providing feedback to students. As you gain familiarity with this aspect of Adobe Acrobat, you will find that spending a few moments now to create the right PDF form rewards you by reducing the time required for ongoing administrative tasks.

If you found this material helpful, you may want to learn how you can teach your students to use Acrobat to create e-portfolios—see “Creating electronic portfolios with Adobe Acrobat.” You may also be interested in using PDF portfolios in conjunction with Acrobat reviewing and commenting features to create a powerful means of providing assessment and feedback on the wide variety of media artifacts students generate. For more on reviewing and commenting in Acrobat, see “Digital assessment with Adobe Acrobat.”