

E-FORM / USERFORM

WORD, EXCEL & ADOBE ACROBAT

# 1.1 Understanding Forms

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1. Forms enable you to collect information
2. Give you a Fill-in-the-blanks interface.



# 1.1 Understanding Forms

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CONTENT  
CONTROLS

2007/  
2010/  
2013/  
2016



LEGACY  
FORM

2003/  
2007/  
2010/  
2013/  
2016

# Open 01 FORM Sample

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Take a look of those forms

FORM 1 / FORM 2 / FORM 3



# Creating E-Forms in Microsoft Word

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# Open

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## 02 CREATING TABLE

## Personal Information

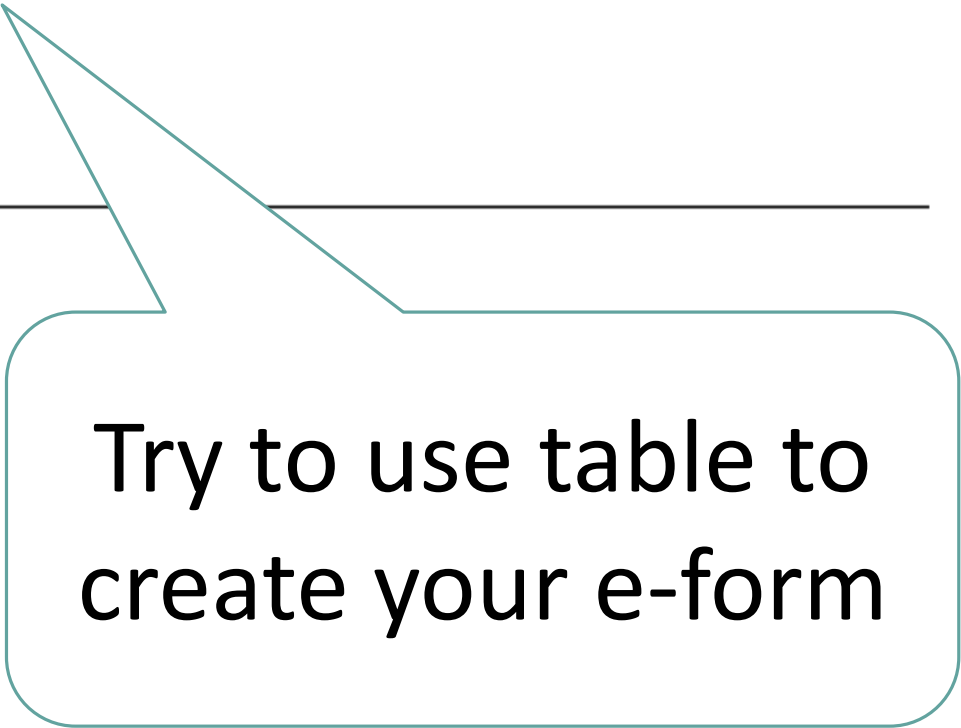
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Surname: \_\_\_\_\_ Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_

Gender:      Female      Male

Address: \_\_\_\_\_



Try to use table to  
create your e-form

# 6 steps

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Step 1: Show the Developer tab (Refer 1.5-*p5*)

Step 2: Save Form document as template (.docx format) (Refer 1.3-*p3*)

Step 3: Add content to the form (Refer 1.6, 1.7 - *p5 to p18*)

Step 4: Set or change properties for content controls (Refer 1.6, 1.7)

Step 5: Add instructional text to the form (Refer 1.7)

Step 6: Add protection to a form (Refer 1.8-*p18*)

# 建立表單的六個步驟

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步驟 1：顯示開發人員索引標籤 (1.5)

步驟 2：開啟要做為表單依據的範本或文件 (1.3)

步驟 3：新增內容至表單 (1.6/1.7)

步驟 4：設定或變更內容控制項的內容 (1.6/1.7)

步驟 5：在表單中新增說明文字 (1.7)

步驟 6：新增保護功能至表單 (1.8)

一般

顯示

校訂

儲存

印刷樣式

語言

進階

自訂功能區 **1**

快速存取工具列

增益集

信任中心



自訂功能區與鍵盤快速鍵。

由此選擇命令(C): ⓘ

常用命令

- 上一個
- 下一個
- 分隔設定
- 手繪表格
- 文字方塊
- 文字方塊
- 文字醒目提示色彩
- 另存新檔
- 巨集
- 字型
- 字型...
- 字型大小
- 字型色彩
- 行距與段落間距
- 刪除
- 快速列印
- 快速樣式
- 兩頁

自訂功能區(B): ⓘ

主要定位點

主要定位點

- 常用
- 插入
- 版面配置
- 參考資料
- 郵件
- 校閱
- 檢視
- 開發人員** **2**
- 程式碼
- 增益集
- 控制項
- XML
- 保護
- 範本
- 增益集

新增(A) >>

<< 移除(R)

# Create Content Control Form

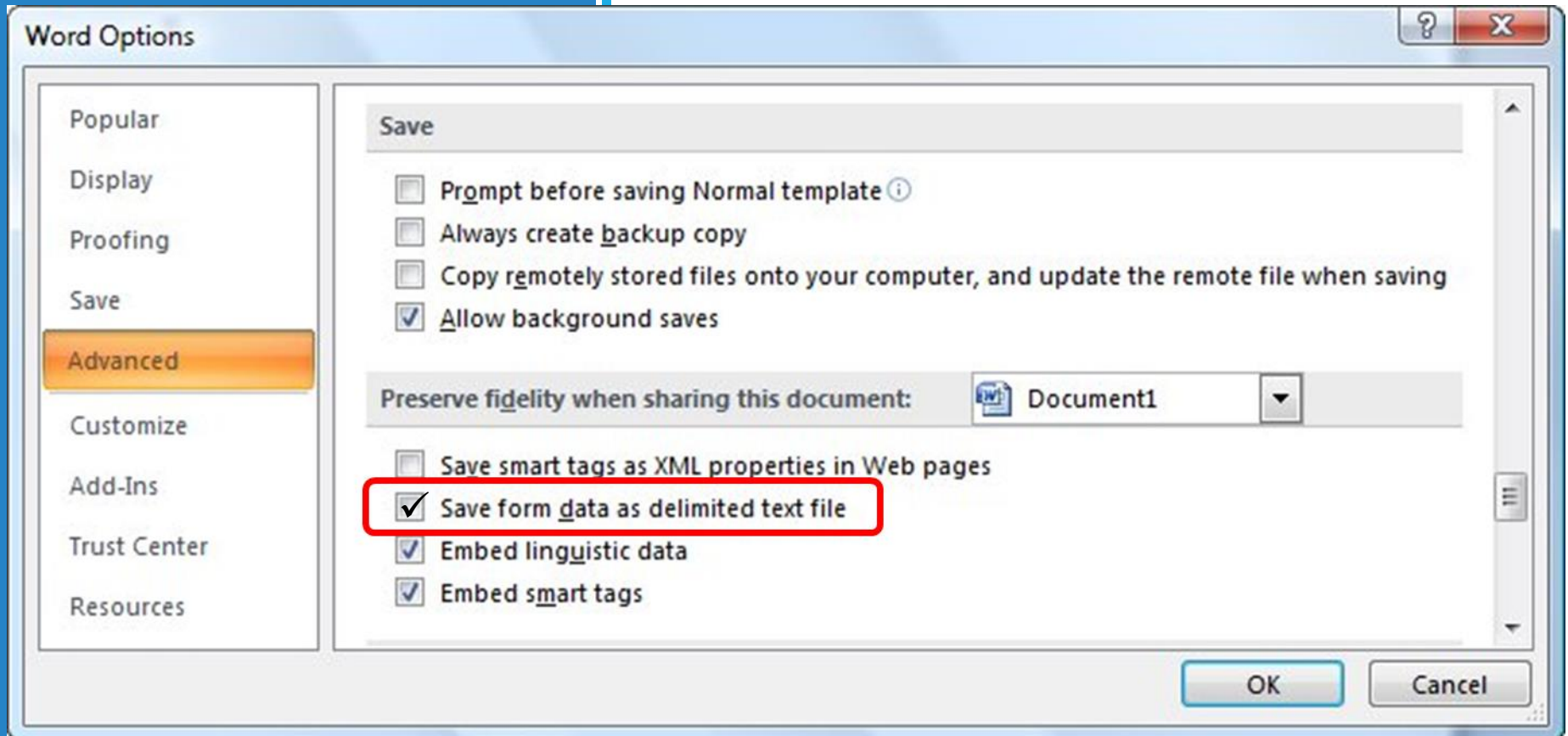
---

# Create Legacy Controls Form

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# Saving Only the Form Data

- ✓ Office button
- ✓ Word Options
- ✓ Advanced



# 儲存表單資料為 分隔符號文字檔

- Office 按鈕
- Word選項
- 進階
- 共用此文件時保留精確度
- 儲存表單資料為分隔符號文字檔

# Printing Only the Form Data

- ✓ Office button / File tab
- ✓ Word Options
- ✓ Advanced
- ✓ When Printing This Document section
- ✓ Mark the Print Only the Data from a Form check box.

# Creating User Forms in Microsoft Excel

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# Create a Macro - VBA

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# Explanation

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Sub Test01()

Msgbox("Hello")

End Sub

- **Sub** means starting your procedure
- **Test01()** is the name of this procedure
- **MsgBox()** is a dialog box in Excel VBA you can use to inform the users of your program
- **End sub** means ending your procedure

Sub Test01()

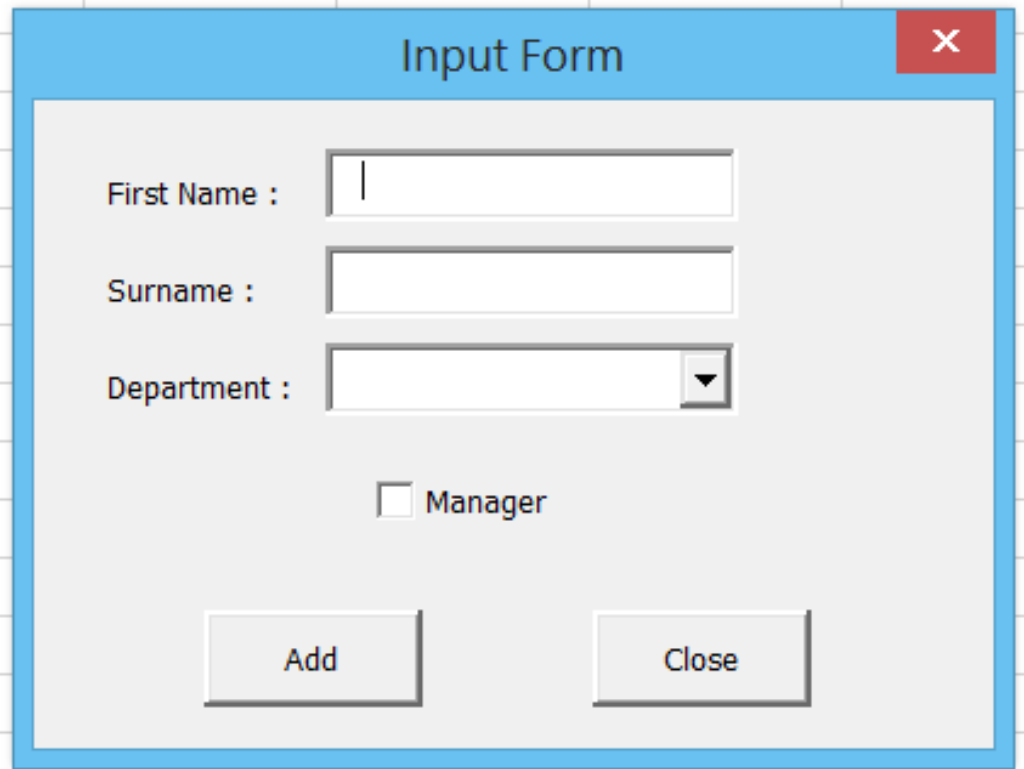
Inputbox("Please input your age.")

End Sub

- **Inputbox()**
  - Displays a prompt in a dialog box, waits for the user to input text or click a button, and then returns a string containing the contents of the text box.

# Building your own User Form

## Design layout



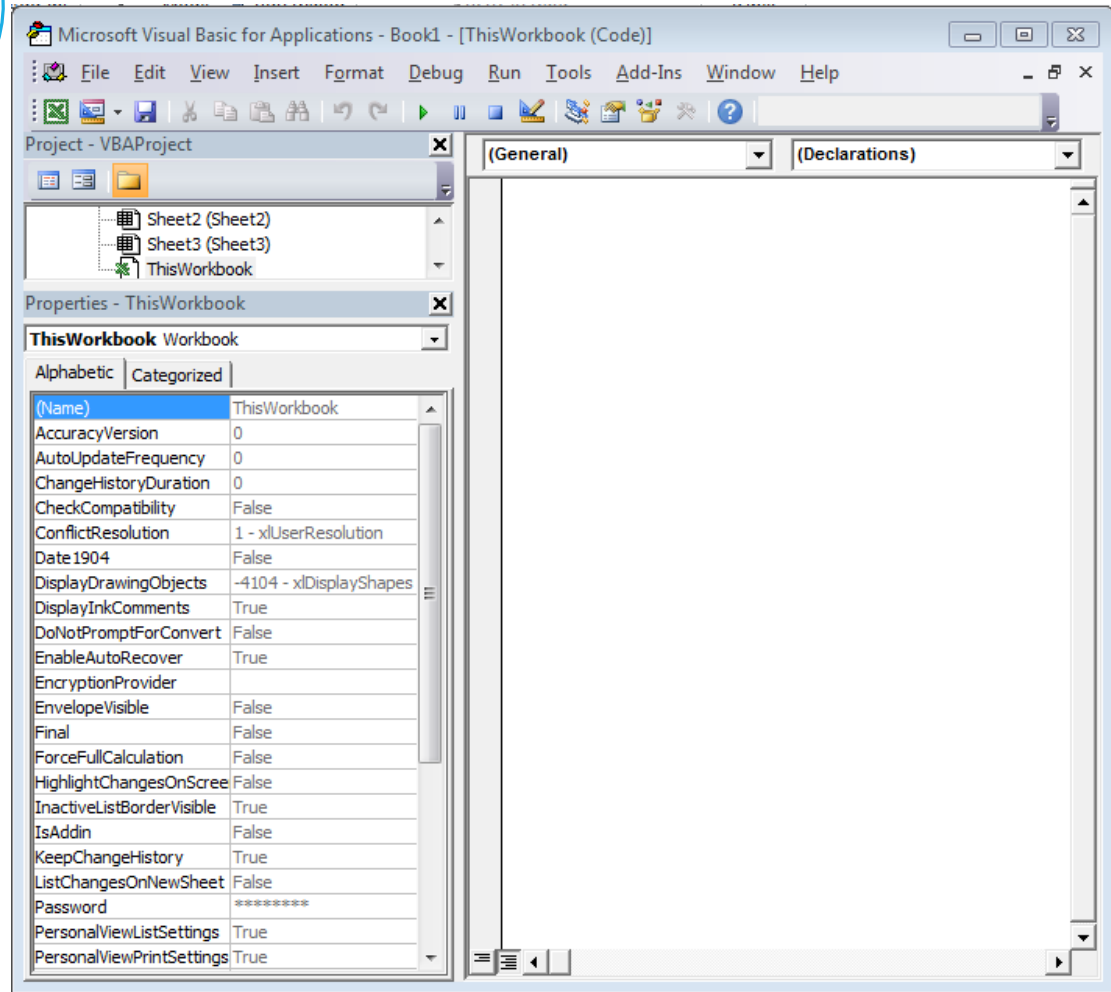
The image shows a screenshot of a Windows-style dialog box titled "Input Form". The dialog box has a blue title bar with a red close button (X) in the top right corner. The main content area is light gray and contains the following elements:

- A label "First Name :" followed by a text input field containing a single vertical bar cursor.
- A label "Surname :" followed by an empty text input field.
- A label "Department :" followed by a dropdown menu with a downward-pointing arrow.
- A checkbox labeled "Manager" which is currently unchecked.
- Two buttons at the bottom: "Add" on the left and "Close" on the right.

Alt F11

## Step 1 : Open Visual Basic Editor

- Enable Developer Tab
- Developer tab
- Code group
- Visual Basic command



# Understanding the VB Editor environment

Avoid DOUBLE-click

Properties

- Name
- Caption

The screenshot displays the Microsoft Visual Basic for Applications editor interface. At the top, the menu bar includes File, Edit, View, Insert, Format, Debug, Run, Tools, Add-Ins, Window, and Help. Below the menu bar is a toolbar with various icons. The main workspace is divided into several panes:

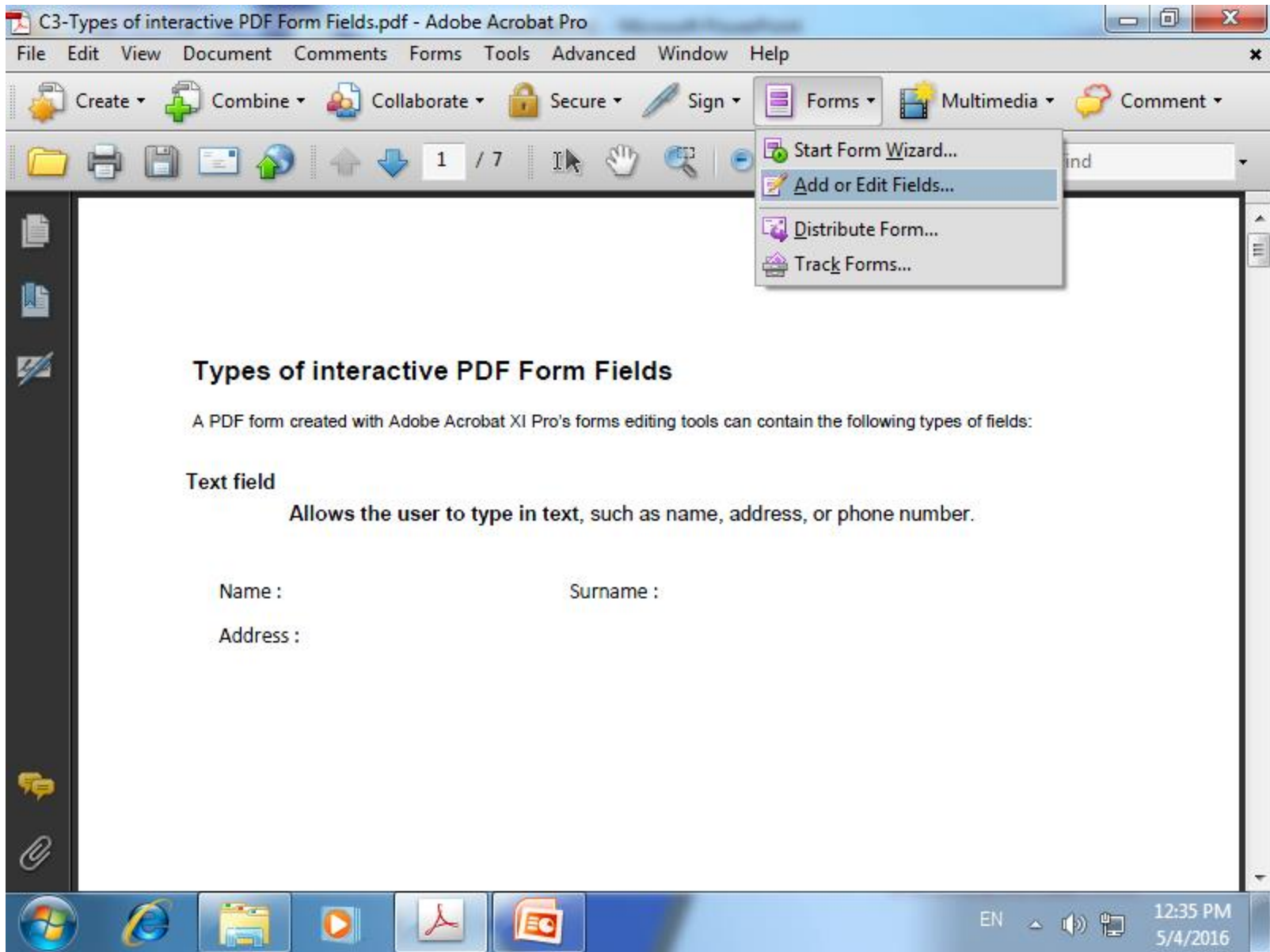
- Project - VBAProject:** Shows a tree view of the project structure. It includes two VBAProject objects: "VBAProject (Book1)" and "VBAProject (FUNCRES.XLAM)". Under "VBAProject (Book1)", there are "Microsoft Excel Objects" (containing "Sheet1 (Sheet1)" and "ThisWorkbook") and "Forms" (containing "UserForm1"). Under "VBAProject (FUNCRES.XLAM)", there are "Microsoft Excel Objects" and "Modules" (containing "RibbonX\_Code").
- Properties - CommandButton1:** Shows the properties for the selected CommandButton1 control. The properties are listed in a table below.
- UserForm1:** Shows a user form with a dotted grid background. It contains several controls: a text box, a list box, a CommandButton1, a CheckBox1, and an OptionButton1. A "Toolbox" window is also visible, showing various controls like a mouse pointer, text box, list box, and checkbox.
- Immediate:** A pane at the bottom right, currently empty.

(Name)	CommandButton1
Accelerator	
AutoSize	False
BackColor	&H8000000F&
BackStyle	1 - fmBackStyleOpaque
Cancel	False
Caption	CommandButton1
ControlTipText	
Default	False
Enabled	True
Font	Tahoma
ForeColor	&H80000012&
Height	18
HelpContextID	0
Left	192
Locked	False
MouseIcon	(None)
MousePointer	0 - fmMousePointerDefault
Picture	(None)
PicturePosition	7 - fmPicturePositionAboveCenter
TabIndex	5
TabStop	True
Tag	
TakeFocusOnClick	True
Top	78
Visible	True
Width	78
WordWrap	False

Adobe

File open :

# 01 Types of interactive PDF Form Fields



## Types of interactive PDF Form Fields

A PDF form created with Adobe Acrobat XI Pro's forms editing tools can contain the following types of fields:

### Text field


Allows the user to type in text, such as name, address, or phone number.

Name :

Surname :

Address :

**Add or Edit Form Fields**

 Currently there are no form fields in this PDF. Do you want Acrobat to detect form fields for you?

Type

A PDF

Text

Name : | Surname :

Address :

**Adobe Acrobat**

Before recognizing form fields, Acrobat needs to save the changes you made.

Save Cancel

Type

A PDF

Text

Name :

Surname :

Address :

Save As

Save in: 03 Adobe

Name	Date modified	Type
C3-Data1-import	3/2/2015 1:24 PM	Adobe Ac
C3-Data2-import	3/2/2015 1:25 PM	Adobe Ac

Recent Places

Desktop

Libraries

Computer

Network

Settings...


File name: Form test01

Save as type: Adobe PDF Files (\*.pdf)

Save

Cancel

**Adobe Acrobat**

 No new form field annotations were detected.

Type

A PDF

Text

Name : Surname :

Address :

Finalize the document

Please fill out the following form. If you are a form author, choose Distribute Form in the Forms menu to send it to your recipients.

**Submit**



**Combo box**

Allows the user either choose an item from a pop-up menu or type in a value.

Color :





- Start Form Wizard...
- Add or Edit Fields...
- Distribute Form...
- Track Forms...

**Create or Edit Form**

**PDF Form**

- Use an existing file  
(PDF, Word, Excel or other file type)
- Scan a paper form
- Create a PDF form from scratch

**Online Form Using Adobe FormsCentral**

- Create or edit a form using the online application  
[FormsCentral.adobe.com](http://FormsCentral.adobe.com)

Next > Cancel

**Locate the document to convert:**

Use the current document

Import a file from file system

Browse...

< Previous   Next >   Cancel

Progress

Converting to Adobe PDF. Please wait... :2 %

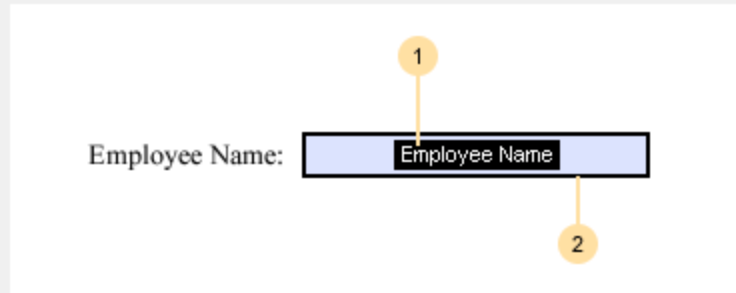
Cancel

### Welcome to Form Editing Mode

Your PDF Form "02a Word form convert to PDF.pdf" has been created.

During creation, Acrobat may have missed some fields or created extraneous fields.

Please validate the fields and field names on your form. You can click Add New Field on the toolbar to add more fields and right-click on the form to edit or delete fields.



**Legend:** 1 = Field Name, 2 = Field

Don't show again

OK

**Fields**

Page 1

- Form
- Name
- Age
- Date of Birth
- Male
- Female
- Phone no
- Location
- Favorite Print
- Best Pizza To
- PepperoniRo
- CheeseRow1
- BeefRow1
- Mushrooms
- SausageRow1
- ChickenRow1

Distribute Form

6 7 8

Age

Male Female Fen

Location

Color

gs

usage Chicken

sageR ChickenR

ds

- Start Form Wizard...
- Add or Edit Fields...
- Distribute Form...
- Track Forms...

## Types of interactive PDF Form Fields

A PDF form created with Adobe Acrobat XI Pro's forms editing tools can contain the following types of fields:

### Text field

Allows the user to type in text, such as name, address, or phone number.

Name :  Surname :

Address :

Form test01.p Distribute Form

File Edit View

Create

Please fill your recip

Comment

highlight Fields

### How do you want to collect responses from your recipients?


Automatically download & organize responses with Acrobat.com

Automatically download & organize responses with Acrobat.com

Manually collect responses in my email inbox


Automatically collect responses on my own internal server

#### Distribute




- Send a secure link to your form that anyone, or only your recipients, can access anytime during form completion.

#### Respond



- Recipients can use Adobe Acrobat or Adobe Reader to fill in the form.
- Responses are encrypted on return.

#### Collect



- Acrobat stores responses on your hard drive as they are returned and notifies you.
- Track which recipients have responded and when they responded.

[Learn more about Acrobat.com](#)

Remember my choice

Help Next > Cancel

12:55 PM 5/4/2016

Form test01.p Distribute Form

File Edit View

Create

Please fill your recip

Comment

highlight Fields

### How do you want to collect responses from your recipients?

Manually collect responses in my email inbox

**An email attachment allows you to:**

**Distribute**

- Send your form as an attachment using Acrobat or your mail client.

**Respond**

- Recipients can use Adobe Acrobat or Adobe Reader to fill in the form.
- Responses are returned to your mailbox.

**Collect**

- Acrobat copies each response into a master response file as they are returned.

Remember my choice

Help Next > Cancel

12:55 PM 5/4/2016

Form test01.pdf - Adobe Acrobat Pro

File Edit View

Create

Please fill your recipient

### Distribute Form


How do you want to distribute your form?

- Send it automatically using Adobe Acrobat
- Save a local copy and manually send it later

Specify where to save the file

C:\Users\User\Documents\01 Eform Ex\03 Adobe\Form test01\_distributed.pdf

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 Send automatically requires a working email application on this computer. To send the form via a web-based email account, use the manual send option (you can then send the form at anytime).

Note: your license limits forms distribution and/or suggestion

[Check the EULA for details](#)

12:56 PM  
5/4/2016

Distribute Form

**This information identifies you to all reviewers:**

Email Address (required field):

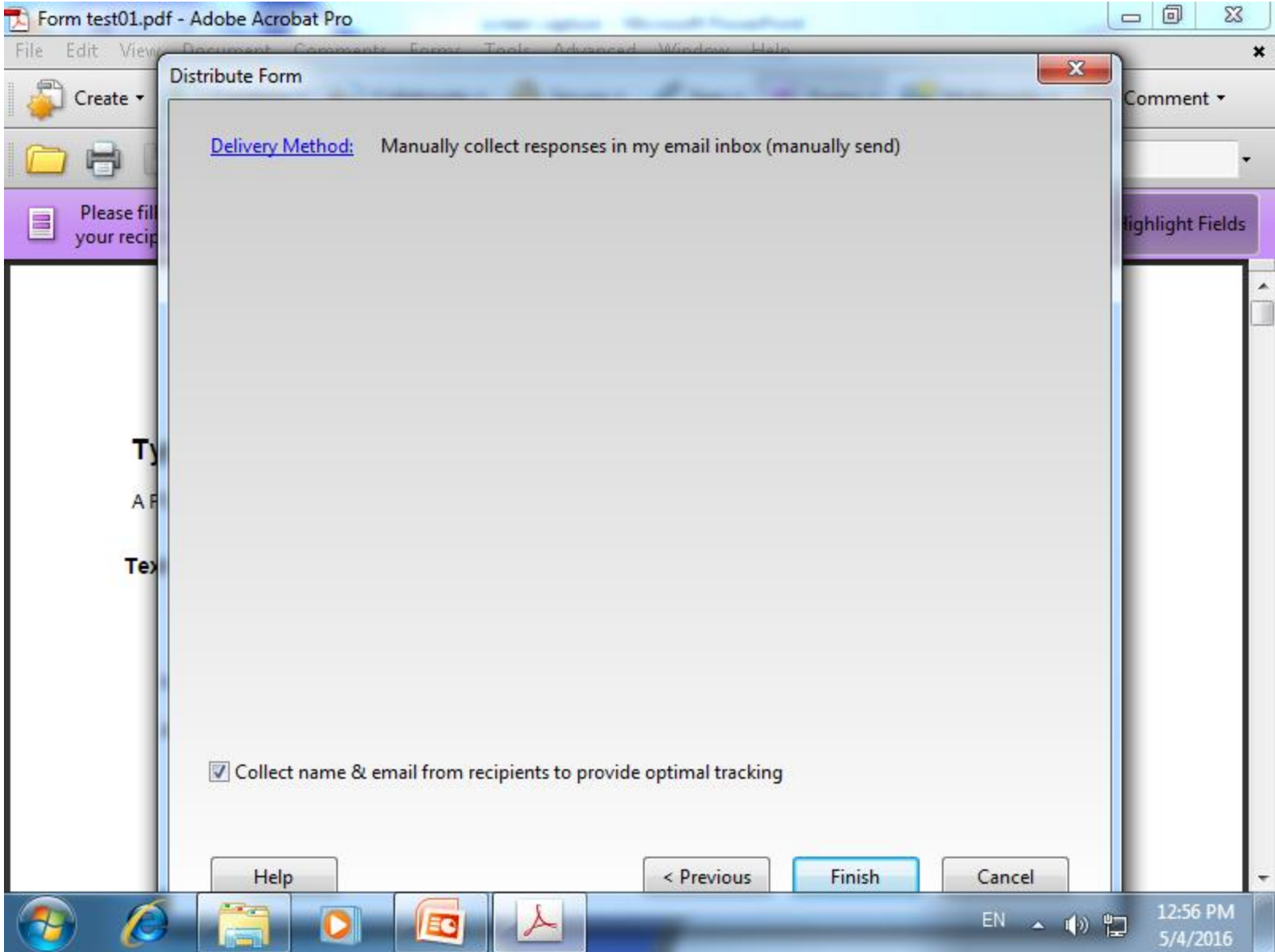
Name (required field):

Title:

Organization Name:

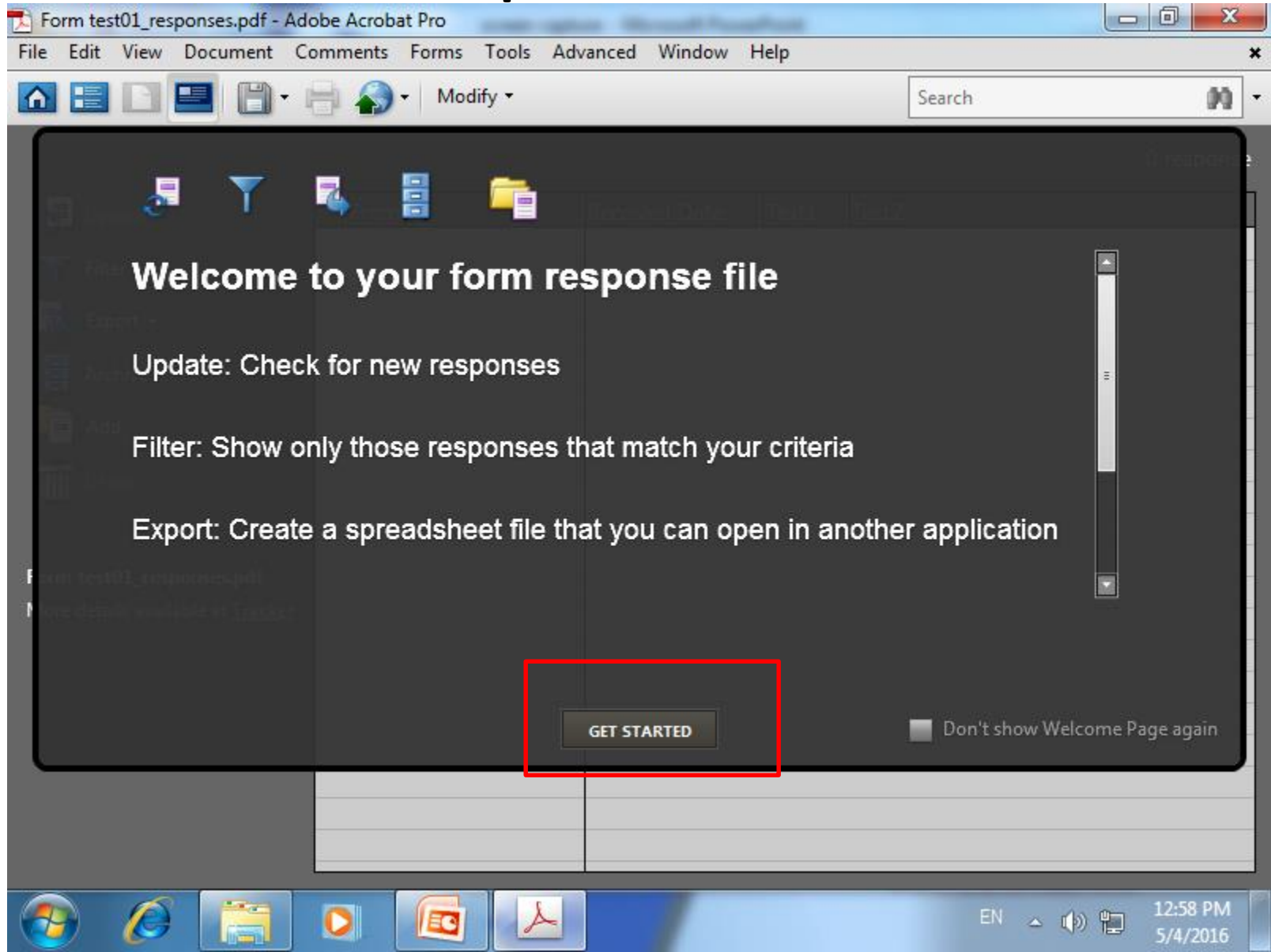


The above information is stored in Acrobat Identity Preferences.



Distribution file for sending  
Response file for tracking

# Response file





0 response

Update

Filter

Export

Archive

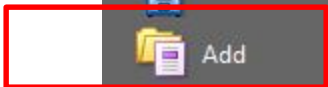
Add

Delete

**Add Returned Forms**

Please select the returned forms to include in the responses file:

Form File	
	<input type="button" value="Add File..."/>
	<input type="button" value="Remove"/>



0 response

- Update
- Filter
- Export
- Archive
- Add
- Delete

### Add Returned Forms

Please select the returned forms to include in the responses file:

Form File	
C3-Data1-import.pdf	<input type="checkbox"/>
C3-Data2-import.pdf	<input type="checkbox"/>

Type of Interaction PDF Form Fields

PDF form fields are used to collect data from users who interact with the form.

**Form Fields**

Form fields are used to collect data from users who interact with the form.

Name	Value
Address	







### Select Folder To Save File

Save in: Desktop

Recent Places

- Desktop
- Libraries
- Computer
- Network

Libraries System Folder	User System Folder
Computer System Folder	Network System Folder
3dsMax2011 Tutorials Shortcut 1.00 KB	Autodesk Revit Architecture 2010 Shortcut
Revit 2010 Adv File Shortcut 1.17 KB	Revit 2010 Powerpoints Shortcut 1.55 KB

File name: Form test01\_responses

Save as type: CSV (Comma delimited) (\*.csv)

Save Cancel