



Creating Adobe® EchoSign® Forms within Acrobat®

Version 1.0

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Outline

EchoSign Text Tags can be used in conjunction with Acrobat form fields, to define the specific properties of a field. While Text Tags are added directly to a document in line with the content, PDF tags are used to name the fields, defining the rules and validations of the physically placed field.

Acrobat Form Fields combine the ease of use of the drag and drop editing environment with the versatility of the text tags.

When a document is uploaded to the EchoSign Document Library or send out for signature, the Acrobat form fields are processed by the system and converted into EchoSign fields. The system specifically looks at the name the field is given, verifies that an EchoSign tag has been defined. It then creates an EchoSign field with the properties you have defined.

The Tags allow for specific properties to be set for the fields. Using this with Acrobat's form field placement tools, your document can be fully functional and professional in appearance.

Tag Version 2.0

This document refers to the current syntax for EchoSign Text Tags, as defined in *Text Tag Documentation 6.0*.

We encourage migrating existing documents from any older syntax, to the current version to take advantage of all the capabilities. A single document can contain tags in the older and newer syntax, however a single tag must only use either the new or the old syntax.

Creating Form Fields in Acrobat

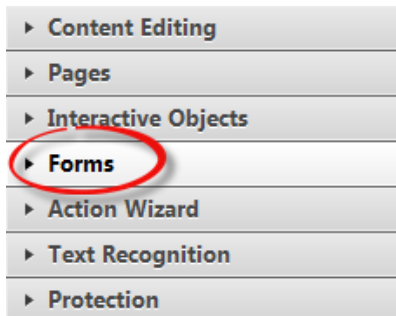
Acrobat allows you to physically place form fields directly onto the document's pages. This section will illustrate how to get to the necessary menus for adding these fields, as well as options for having a more uniform look to the fields on your document.

The Forms menu

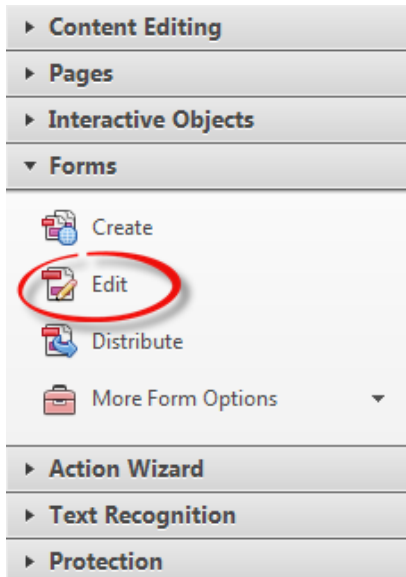
Start by opening your PDF using Acrobat and click on the "Tools" button in the upper right hand corner.



From the resulting list that opens in the pane on the right, click on "Forms".

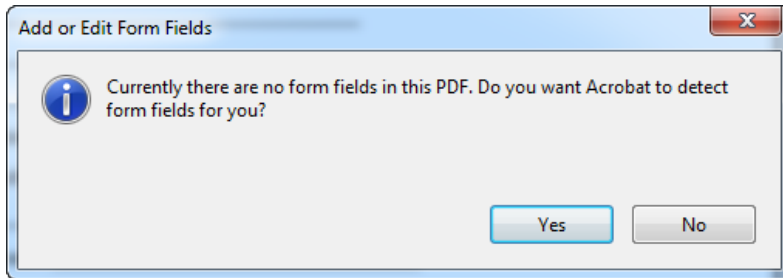


The menu will expand and show options for creating forms. Click on the "Edit" option.



If this document does not already have form fields placed on it, a dialog window will open asking if you would like Acrobat to detect form fields for you. Depending on the layout of the document, this can be a helpful tool. Acrobat will search the document for underlined spaces or empty boxes and automatically place form fields. This process will also name all of the fields with the text found local to the field placed. Ultimately the names of all of these fields will be replaced with tags, but in the case where no tag is

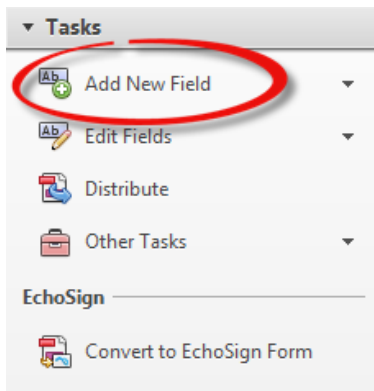
needed for the field; it will still remain uniquely named, avoiding any issues with cross field pollination. Cross field pollination is the process that EchoSign uses to copy data from one field to another if they have identical names.



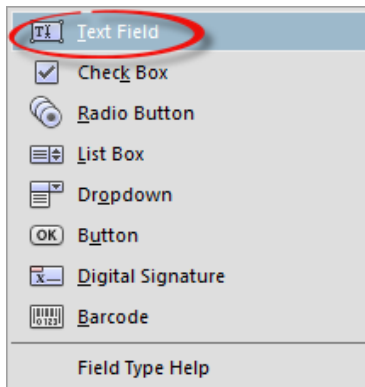
Clicking “Yes” will ask you if you want to create forms using a new document or an existing document. Choose existing document and then choose “Current Document” from the following options.

Manually placing form fields

The Forms menu will display tasks for creating and editing form fields. Click on the “Add New Fields” option.



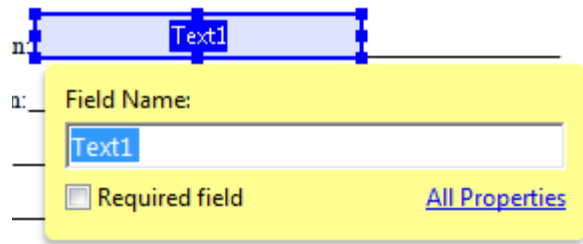
A dropdown menu of the types of fields will be revealed. For standard fields where information will be typed in, select “Text Field”.



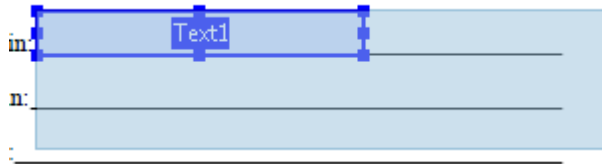
The cursor will change, as the image below illustrates. Single clicking will place the field as is, in the location you click. Alternatively, you can single click and drag to make the field the desired size.



When the field is placed on the page, a small window will appear where the name of the field can be changed. For the process of adding fields to the document, this can be ignored for the time being, as you will be making changes to all of the field names on the document later.



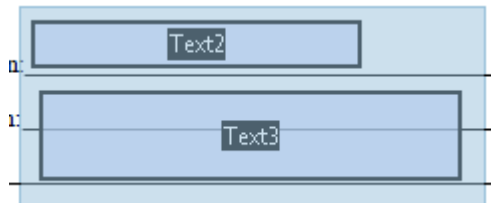
Clicking and dragging on one of the blue boxes (or handles) allows the size of the field to be changed.



Changing form field size and alignment

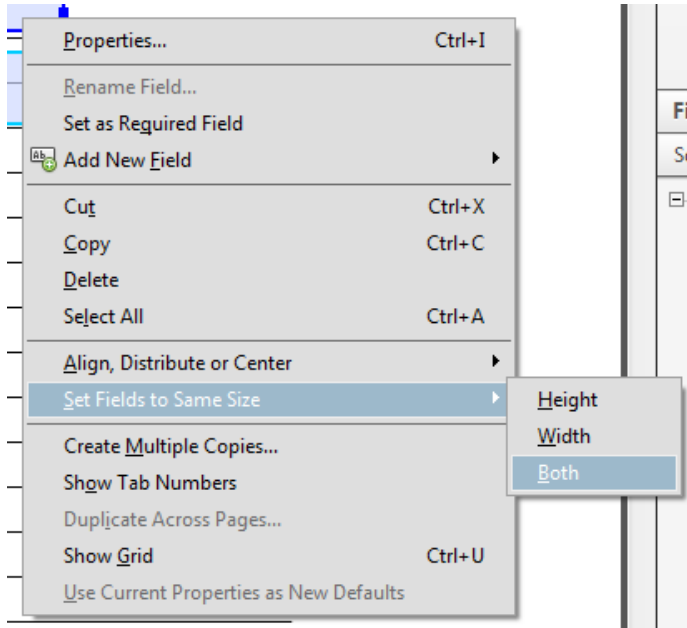
Once fields have been roughly placed on the document, tools within Acrobat can make field sizes more uniform and aligned.

If there are two fields that are different sizes and you want the dimensions to match, click and drag the cursor around the fields to select them.

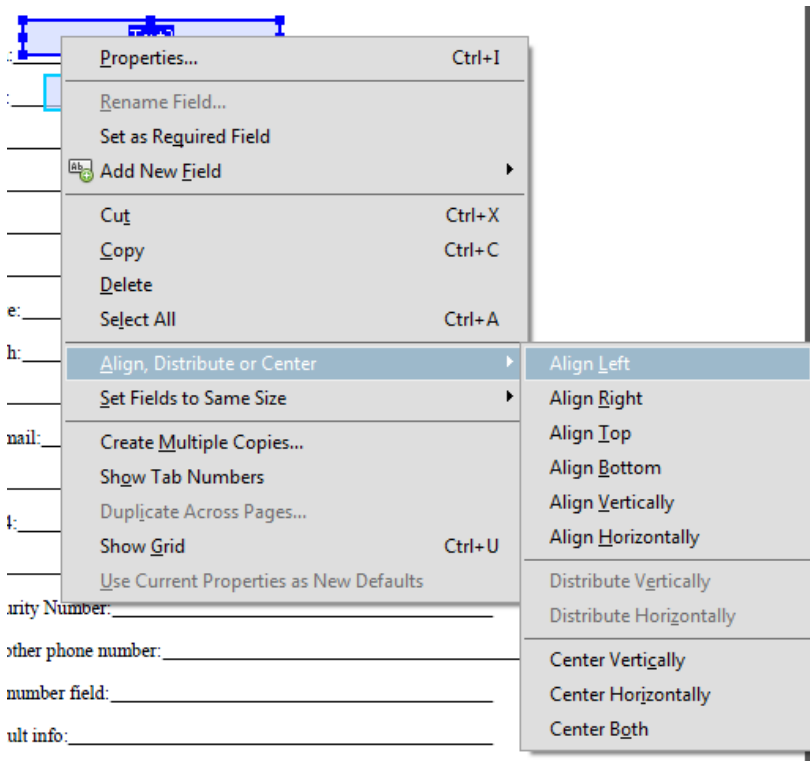


When setting the size and alignment for multiple fields, the menu action needs to be chosen by right-clicking on the field that is in the desired alignment or is the correct size.

In this example we want “Text3” to be the same size as “Text2”, so with both selected we right click on “Text2” and choose “Set Fields to Same Size” and “Both”.

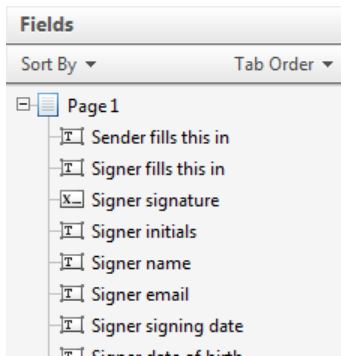


As a result “Text3” is now the same size as “Text2”. Now we want the “Text3” field’s left side to align with the left of “Text2”. With both fields selected, right click on the “Text2” and select “Align, Distribute or Center” and “Align Left”.



Using tags in your placed form fields

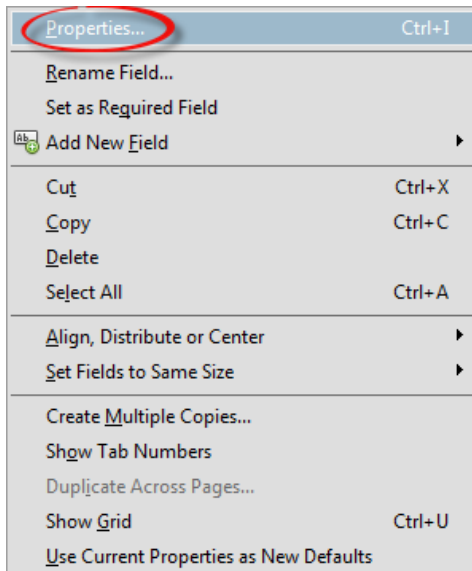
Once your document has all of the form fields added, a listing of the fields will be displayed in the lower section of the pane on the right. This can be used to find or access any form field on the document quickly, without being on the page. Since the names of the fields are displayed here, it makes checking the tags for the fields easy.



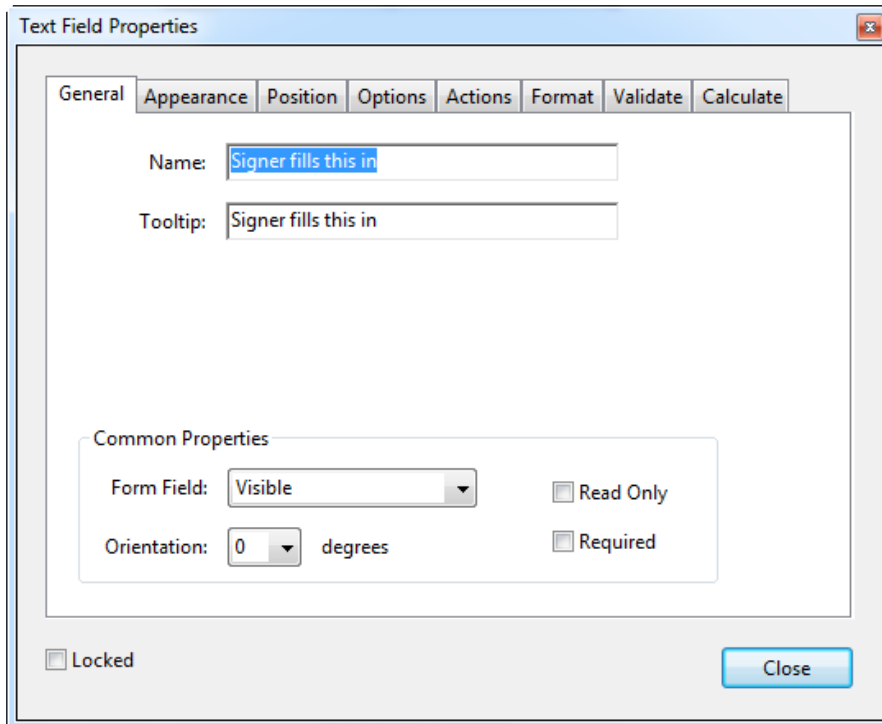
Naming form fields

Changing the name of the form field to an EchoSign tag allows you to apply all of the field properties recognized by EchoSign, without sacrificing space on the document like a Text Tag would.

To access the properties menu for the form field, either double click on the field or right click and choose "Properties" from the menu.



The General tab on the Properties window displays the Name, Tooltip and Common Properties of the field.



1. Name – Where the tag for the form field will be added
2. Tooltip – Information that will popup if the mouse pointer is held over the field
3. Read-Only – Makes the field inaccessible and not editable, generally used if information is being pushed into the field by an integration or CSV file.
4. Required – Will mark the field as required so the signing process cannot be completed unless data is entered into this field

While the EchoSign drag and drop environment does not support (or have an option for) multi-line fields, you can set a field up this way in Acrobat and have it function through EchoSign. This option is called “Multi Line Field” under the “Options” tab.

Refer to *Text Tag Documentation 3.0* for tags to be used in the form fields on your document.

Please note *Text Tag Documentation 3.0* will show all tags with “{ }” surrounding them, as it is necessary for them to be processed. These “curly braces” are not necessary and should be omitted in order for them to function within the form fields.

Placing other objects

Aside from the standard text fields, Acrobat has check boxes, radio buttons and dropdown menus that will function through EchoSign. The options for these objects can be applied using the arguments in the tag, or through the object properties in Acrobat.

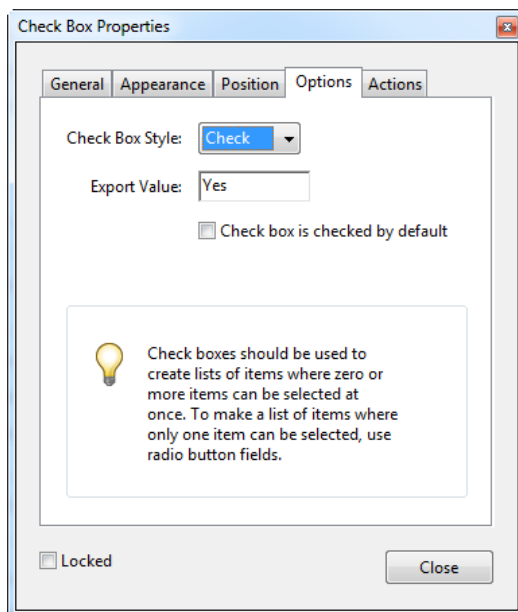
If you choose to use the object properties in Acrobat, ensure you still enter a basic tag for the name of the object. For example, if you have a check box and all of the settings were set in the Properties

window, just name it CB1_es_:signer1, for example. This will ensure the object has a name and is assigned to the intended recipient.

Check Box

Choosing “Check Box” from the “Add New Field” menu, will change the cursor and allow you to place the check box.

The options available are setting the Export Value and marking the check box as checked by default. Changing the “Check Box Style” will not affect how the check box is visually represented in EchoSign, but the resulting PDF document will have the chosen style.



Radio Buttons

Choosing “Radio Button” from the “Add New Field” menu, will change the cursor and allow you to place a radio button.

Once you click to place the first radio button, the default properties window will appear, warning you that there needs to be a minimum of 2 radio buttons in the group. Since radio button provide a “one or the other” solution there needs to be a minimum of at least two options available. Another radio button can be added by clicking the “Add Another Button” link or by choosing “Radio Button” from the drop down again, placing the object and renaming it to the same Group Name.

Radio Button Choice: ⓘ

Choice1

Group Name:

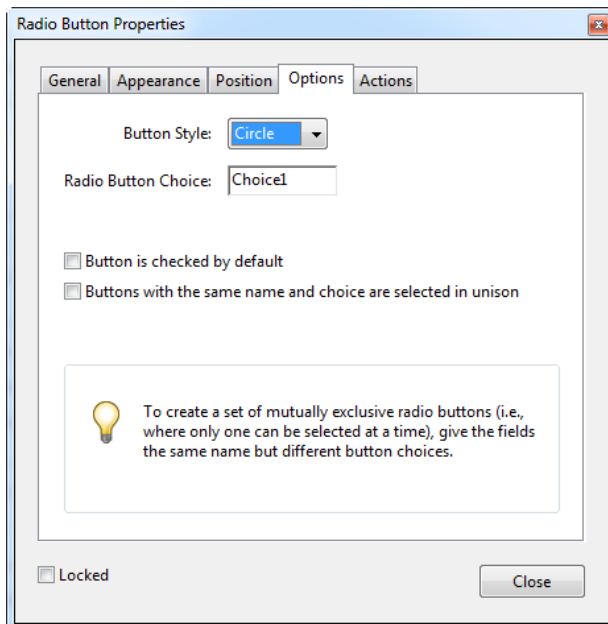
Group2 ▼

Required field [All Properties](#)

Warning: 1 button in group. At least 2 buttons needed.

[Add Another Button](#)

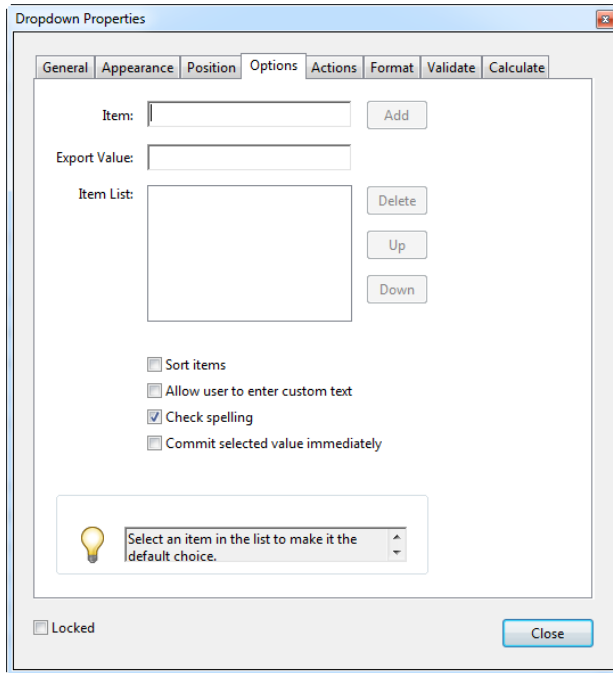
The options available are setting the Choice name, marking the radio button as chosen by default and linking identically named buttons to be selected together. The name of the radio button determines what group it is in, so if you're creating an array of radio button options, they will need to be named identically in order to be a part of the same group.



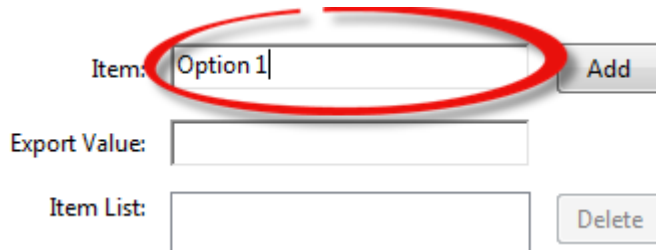
Dropdown Menus

Choosing "Dropdown" from the "Add New Field" menu, will change the cursor and allow you to place a dropdown menu.

To set the options for the dropdown menu, go to the “Options” tab of the properties window.



Enter the name of the option in the “Item” field. Additionally an export value should be entered, for the sake of being able to track the option chosen. Once you’ve set up the dropdown choice, click the “Add” button.





This will move the choice down to the item list, where they can be sorted and managed.


Item:

Export Value:

Item List:

Option 1	<input type="button" value="Delete"/>
	<input type="button" value="Up"/>
	<input type="button" value="Down"/>

Sort items
 Allow user to enter custom text
 Check spelling
 Commit selected value immediately



Again, naming the dropdown with a tag suggested, as it provides an opportunity to name and set the role for the field. For example: DD1_es:signer1: