

## Creating an interactive document using MS Word and Adobe Acrobat

**Step 1:** Open Microsoft Word by **double-clicking** the Word  icon on your desktop, or by going to **Start → Programs → Microsoft Word**. A new blank word document will open.

**Step 2:** Create a form that will be used as a template. For example, below I've created a simple template that asks for the name, address, and phone number of the recipient.

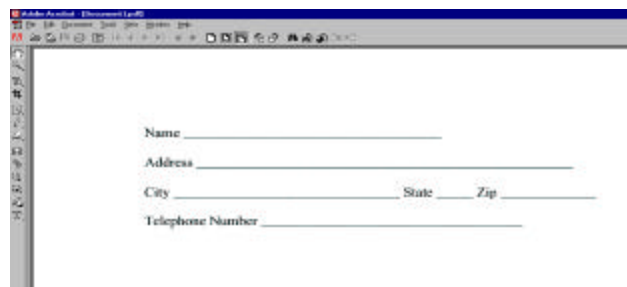


A screenshot of the Microsoft Word application window. The document contains a form with the following fields: Name \_\_\_\_\_, Address \_\_\_\_\_, City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_, and Telephone Number \_\_\_\_\_.

**Step 3:** Once the template is finished, go to **File → Print**. Then select **Acrobat PDFWriter** as your printer and click **OK**. A window will appear that will ask you to designate where you want the PDF to be saved. Navigate to the appropriate folder then hit **Save**.

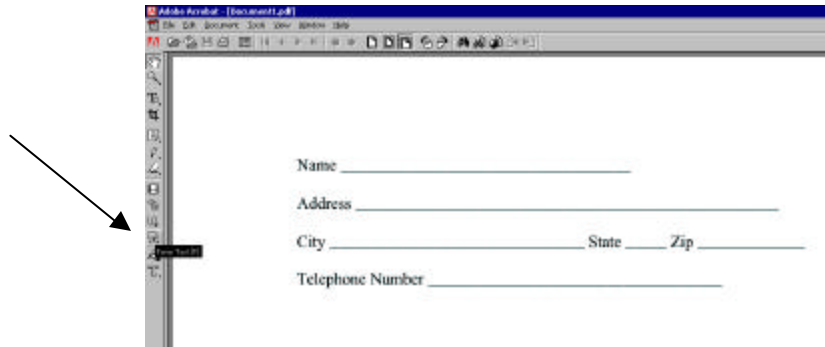


**Step 4:** Navigate to the folder where the new template is saved and open the PDF. The form you created in MS Word, is now in a PDF format.

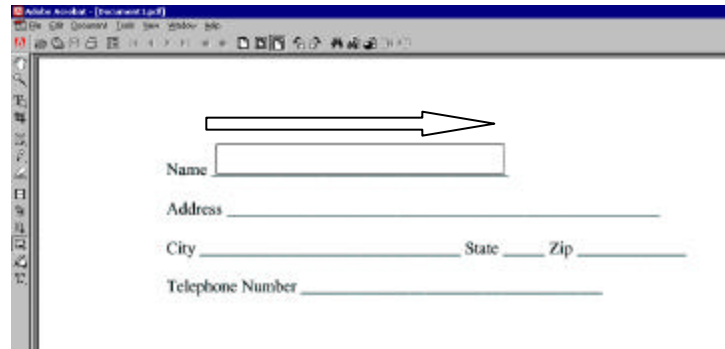


A screenshot of the Adobe Acrobat application window. The document is a PDF of the form created in Step 2, with the same fields: Name \_\_\_\_\_, Address \_\_\_\_\_, City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_, and Telephone Number \_\_\_\_\_.

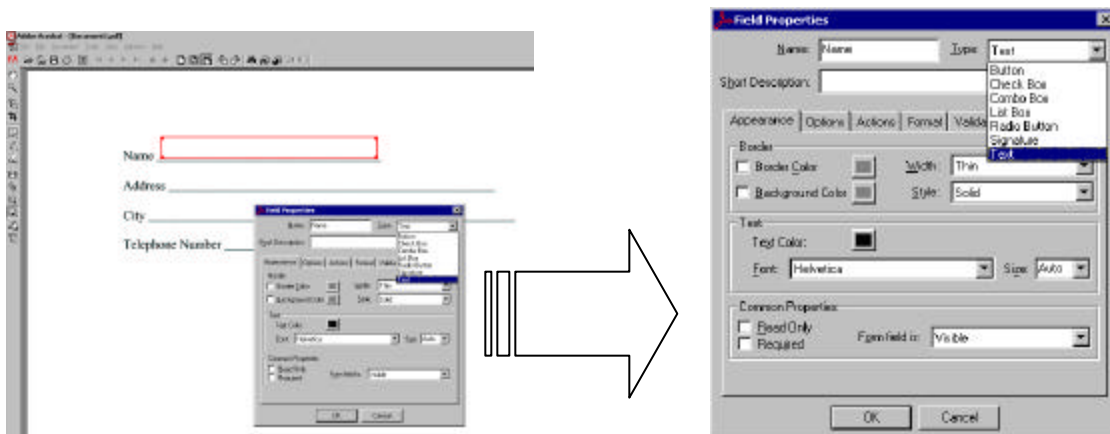
**Step 5:** To make this template **interactive**, click on the **Format Tool** icon along the left-hand side menu.



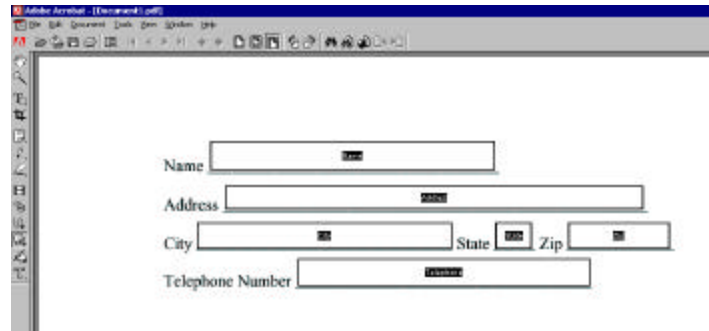
**Step 6:** After clicking on the icon, your mouse cursor will turn into cross-hairs. Create a box where you want data to be inputted in by left-clicking and holding down the button while you drag the cursor across to make a box. (see picture)



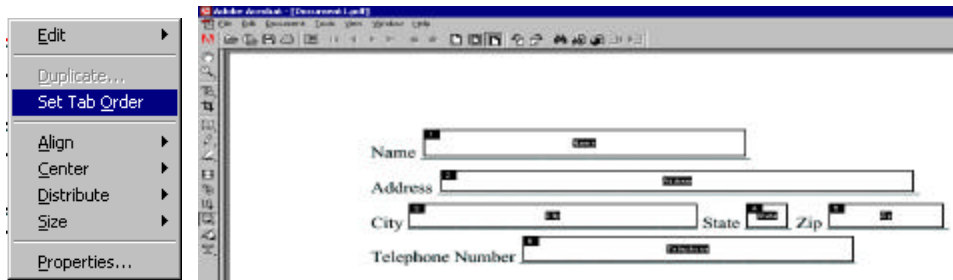
**Step 7:** The **Field Properties** window will appear where you can set the properties of the box you just created. Enter in a name for the box under **Name**. Then select the **Type** of data that will be entered in that field. For this example, we will select **Text**. You can also change the font style, color, and size under the **Text** section. After you have selected the properties, click **OK**.



**Step 8:** Repeat steps 6 through 8 for the rest of the fields that you want to be interactive.



**Step 9:** Set the **Tab Order** of the fields by right-clicking one of the fields and select **Set Tab Order**. The cursor will now have a # next to it. There will be numbers along the top left-hand corners of each field. Start with the first field you want the user to enter data in first and left-click that field. Then continue on to the next field you want the user to enter data in and left-click again. The numbers along the top left-hand corner will reflect the order you assign it.



**Step 10:** Once the tab order is set for the fields, click on the white hand icon along the left-hand menu. That will activate the fields within the template. Test out the fields by entering some text and tabbing through the fields. If everything is correct, you should be able to enter in text within the fields and tab to the next field.

