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# Acrobat Insider for AEC Professionals

Tips and Tricks for Adobe Acrobat 7.0

Brought to you by cadalyst

**Create interactive forms easily with Adobe Acrobat 7.0 with Adobe LiveCycle Designer.**

## Hassle-Free Forms for AEC

### Interactive Adobe PDFs make data collection faster, easier and more accurate

**by Michael Dakan**

Nearly every standard procedure in an AEC office involves a form of some sort, usually attached to drawings and other documents. These forms track workflow, request a reply or other action, specify information to record or return and so forth — and the process has long been paper-based and intensely manual.

Today, however, architectural firms are beginning to automate these procedures to save time, effort and money and increase accuracy. Did you know that Adobe® Acrobat® 7.0 Professional tools can help you create standardized electronic forms that facilitate user interactivity and workflow automation?

Acrobat 7.0 Professional for Microsoft® Windows® includes Adobe LiveCycle™ Designer, an application for easily creating interactive, Adobe PDF-based forms. You can deliver these forms via e-mail or a Web server, and recipients fill them out using Adobe Acrobat or the free Adobe Reader® — operating on virtually any computer hardware or software platform — and return them electronically. You can even automatically compile the data in a spreadsheet or database if you wish.

Using digital forms instead of their paper counterparts saves money because you'll avoid traditional delivery charges. It saves time because forms delivery is virtually immediate and you won't spend time on manual tracking or data entry. And it improves accuracy because you can automate data collection and avoid mistakes associated with manual data entry.

**How to Create Interactive Digital Forms**

It's easy to get started replacing your paper forms with digital forms that improve your office workflow. Using Adobe LiveCycle Designer, you can add forms

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**IN THIS ISSUE**


- Easily design Adobe PDF forms
- **This month's tips:** Store intermediate document records as Adobe PDFs; extend forms capablities for Adobe Reader users


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**IN THE NEXT ISSUE**

Next month, *Acrobat Insider* will cover how to create more intelligent documents from technical applications using Acrobat 7.0 Professional.

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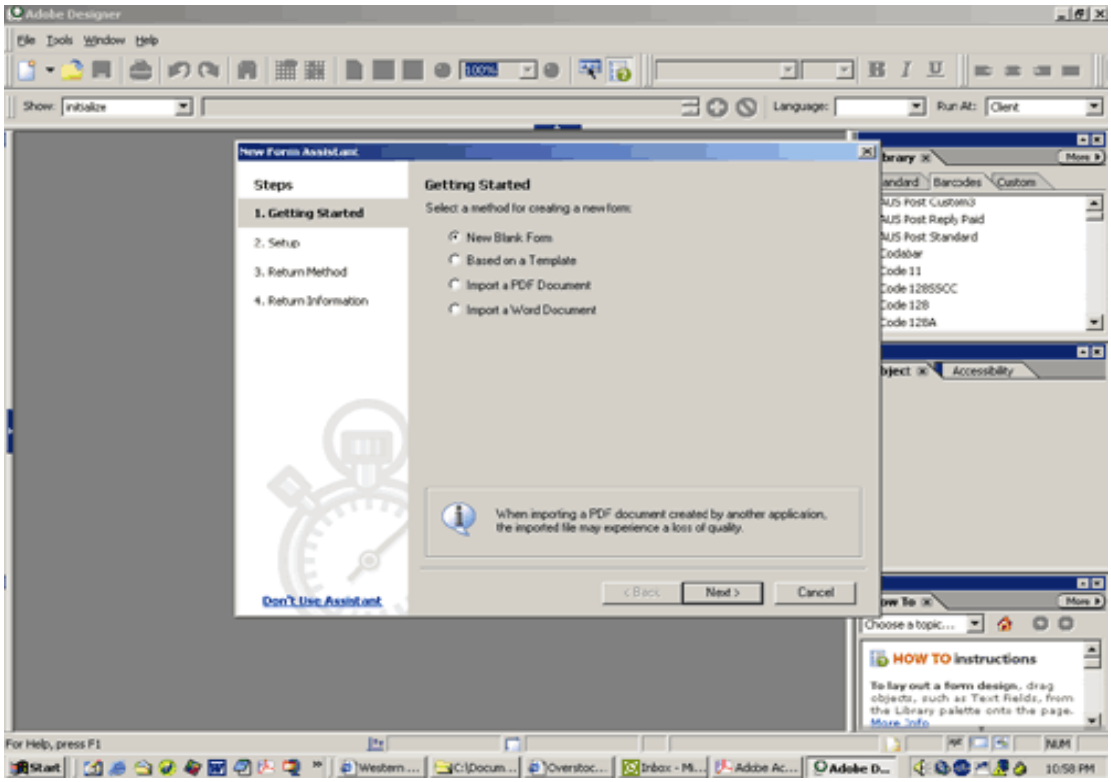
**SUBMIT A TIP**

We welcome your tips for AEC-specific uses of Acrobat 7.0 Professional. If we publish your tip, we'll send you a *Cadalyst* t-shirt.

interactivity to an existing Adobe PDF or Microsoft Word document, build on a template, or create a form from scratch. You don't have to be an expert to take advantage of LiveCycle Designer: It's so easy to use, you can build an new interactive digital form in as little as a few minutes!

To design a new form using Adobe LiveCycle Designer, first launch Acrobat 7.0 Professional for Windows. Go to the Advanced menu and select Forms / Create New Form. A series of self-explanatory dialog boxes will walk you through the setup process: Indicate whether you want to start with a new blank form, base the form on a template or import an existing Adobe PDF or Microsoft Word file. You'll also be asked to select a return method for the form data — where should data be sent when the form recipient clicks the Submit button? A new document will open in LiveCycle Designer, and Acrobat Professional will continue to run in the background.




**To access Adobe LiveCycle Designer from Acrobat 7.0 Professional: Start with the Advanced Menu, select Forms, then Create New Form.**

Use the tools and predefined fields and objects that are built into Adobe LiveCycle Designer to lay out the form and add interactive features. The Library of fields and objects appears along the right side of the editing workspace, displaying all standard and custom objects, arranged in tabbed palettes. Explore the Library to see the different objects you can incorporate in your form. Simply drag an object from a Library palette and drop it in the form where you want it to appear.

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## REQUEST A TIP

Have a question about Adobe Acrobat 7.0 Professional? A suggestion for a future edition of *Acrobat Insider*? Send it in; we'll address the most popular requests in upcoming issues.

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## LEARN MORE

Find out more about how the Adobe Acrobat family of products can streamline processes, improve document security and more at Adobe's AEC Web site or click here to view an OnDemand online presentation.

**Download a 30-day trial of Acrobat 7.0 Professional.**

Download

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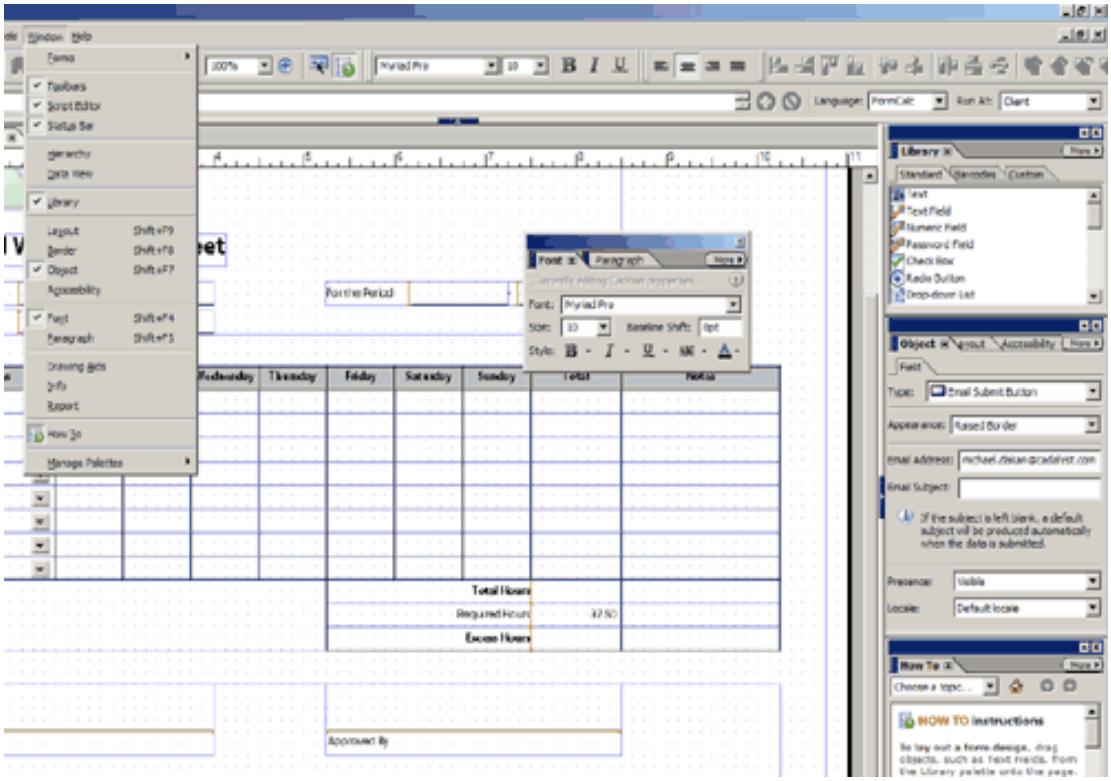
## NEW!!

The latest version of **Photoshop has arrived,** with groundbreaking new features for AEC professionals! Click here to learn more and download tutorials for Vanishing Point,



**The LiveCycle Designer workspace displays its many forms-design tools: the Font palette (floating), Library, object properties and the How To palette are all at your fingertips.**

You can create your own objects (or object groups) — such as your company logo, name and address, and so forth — and store them in the object Library for quick and easy reuse. Drag an object you have created onto a tabbed palette to save it in the Library. A Custom tab already exists under the general Library palette where you might wish to save your custom objects, or you can create a subtab for your company-specific objects.

Preview your document at any time to see how the finished Adobe PDF form will appear to users: Simply click on the PDF Preview tab at the top of the form layout.

I highly recommend *Adobe Acrobat 7.0 Classroom in a Book*, published by Adobe Press, to learn the basics of creating forms in LiveCycle Designer. And be sure to use the Help menu in LiveCycle Designer to access the wealth of tips and step-by-step tutorials to get you started.

### Collecting Forms Data

Using Acrobat 7.0 Professional, you can define a workflow process to automatically collect forms data via e-mail or Web server. When a recipient completes and submits a form, the data is returned to the data repository you specify. If you wish, use the collected data to create a spreadsheet or database records. For full details about this process, click on the Forms toolbar button and choose How to Collect Form Data.

### Forms Tools in Acrobat 7.0 Professional

If you don't have access to the LiveCycle Designer that comes with the Windows version of Acrobat 7.0 Professional, you can still find many of tools you need to

which enables you to edit in perspective.

create interactive forms in Acrobat itself. Use the Tools menu / Advanced Editing options, or click on Tools menu / Show Forms Toolbar to display all the option buttons on your desktop. If you do have access to LiveCycle Designer, however, it is definitely the forms design environment of choice. It is easy to use, provides comprehensive design options and automates and eases many design processes — in short, LiveCycle Designer is worthwhile to learn for all your PDF forms-design tasks.

**Adobe PDF Forms in Action**

Recent news in the AEC community has brought to light an excellent example of how interactive Adobe PDF forms can significantly streamline workflow. The USGBC (U.S. Green Building Council) has automated its LEED (Leadership in Energy and Environmental Design) certification process to provide more convenient and faster submission and processing of LEED-required documents. I reported on this joint effort of USGBC and Adobe Systems in the November 17 edition of *Cadalyst's AEC Tech News* newsletter.

The formerly cumbersome, paper-intensive LEED certification process is now entirely online and built on Adobe PDF-based forms. The LEED certification process now can be completed by project team members using Adobe Reader or Acrobat. The new interactive forms will make the documentation process easier and less expensive for users and the council. USGBC administrative personnel reportedly used LiveCycle Designer to create approximately 50 interactive forms in just three days.

You, too, will find that creating interactive Adobe PDF forms using Adobe LiveCycle Designer will greatly assist in automating many data-collection and processing tasks, saving time, effort and money in your AEC office.

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## Tips and Tricks

**Store Intermediate Document Records as Adobe PDFs**

Thanks to reader Barry Millikin for this great tip: "AEC professionals know the importance of maintaining a record of everything that goes out of the office, including incremental changes to preliminary construction drawings and other documents. Adobe Acrobat 7.0 Professional makes this easy and eliminates the need to keep a lot of paper copies of sets of drawings on file. Simply convert the documents to an Adobe PDF and store the PDF as a record copy containing the date of issue. Then it's easy to make paper copies at any time necessary or to review project history to find when a certain change was made."

**Extend Forms Capabilities for Adobe Reader Users**

Users of Adobe Reader 7.0 can fill in interactive Adobe PDF forms and print them or return the form data electronically using the Submit button on the form. To provide additional capabilities to forms recipients — such as saving copies of completed forms, saving the form data file to disk or adding a digital signature to a form — investigate Adobe LiveCycle Reader Extensions for your server.

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## About the Author

*Michael L. Dakan, AIA, is an architect, author and independent AEC technology consultant. Twice monthly he writes* Cadalyst's AEC Tech News *e-mail newsletter. Contact him at michael.dakan@cadalyst.com.*

### Details and Availability

For a full list of features and system requirements, visit Adobe's Web site. Microsoft Windows 2000 with Service Pack 2, Windows XP® Professional or Home Edition, or Windows XP Tablet PC Edition is required for use with Acrobat 7.0. Acrobat 7.0 Professional for Windows, available on CD-ROM or by download, is US$449*.

*Price listed is the Adobe Store direct price, and is listed in U.S. dollars. Reseller prices may vary. Price valid in the U.S. and Canada only. Applicable local sales tax and shipping may apply.

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