

Converting Paper Forms to E-Forms: Web vs. Word vs. Acrobat

If you want to distribute your office's forms electronically, so that people can fill them out on their computers, you can do this in several formats: Web page/HTML, Microsoft Word, and Adobe Acrobat. This handout discusses the pros & cons of each of these formats, and what you need to consider when deciding which one to use. All of the form formats discussed here can be distributed via a link on a web page.

Web (HTML) Forms

Web (HTML) forms allow web page users to fill out the form online right in their web browser (Netscape or Internet Explorer), and click a button to submit the form. The form data is then e-mailed to an address of your choosing. The program that processes the form and sends the e-mail is already on the College web server; any web page form on the College web site may use it. This is probably the easiest method for users, provided they don't need to submit formatted text via the form.

Web forms are best for when you:

- want the entire form submission process completed electronically (no paper!)
- want to make it easy for users to fill out & submit the form
- want everyone to be able to complete the form, no matter what type of computer or software they use
- do not need a printed record of the form
- do not care if the form adheres to a specific formatted look

Web forms are *not* a good choice when you:

- need to keep a printed copy of the form on record
- need the form to retain a specific formatted look

Web forms can contain text boxes, drop-down selection lists, check boxes, and radio (either/or) buttons. You need to know a little HTML in order to create a web page form, but you can easily copy the HTML code you need from forms that already exist on our web site and edit it to suit your needs. Many examples of web page forms can be seen on the Tech Support web site at <http://www.snc.edu/techsupport>. In Cascade Server, web forms must be created by someone on the web team. To request a form, complete the Service Request Form at <http://www.snc.edu/service>.

Microsoft Word Forms

Microsoft Word also offers the ability to create forms that users can fill out on their computer screens, save, and print. Of course, in order to fill in the form, the user must have Microsoft Word installed on their computer.

With Microsoft Word forms, you can protect the form so that people can only type in the form fields you specify. This prevents people from altering the document's formatting, with the exception of the pagination (the form may get longer depending upon how much people type in the text boxes).

Word forms are best for when you:

- only need to distribute the form to people who you know have Microsoft Word, either the same or a newer version than you are using to create the form
- want people to be able to print and save the form
- want the form to retain its original formatting, except for pagination (the form may get longer, depending upon how much people type in the text boxes)
- want the form submitted to you in paper, so that you can keep a printed copy of the form on record

Detailed instructions for creating Word forms are available in the handout *Creating Electronic Forms in Microsoft Word*, <http://www.snc.edu/techsupport>.

Adobe Acrobat Forms

The Adobe PDF format allows you to distribute copies of highly formatted electronic documents that look exactly like the originals. The full Adobe Acrobat program (see below) allows you to add form fields to a regular PDF file, so that people can fill out the form on their computers.

The problem with this format is that users who have the free Adobe Reader program (everyone) can fill out and print PDF forms, but they **cannot save** the form with the information they have typed in. (If they save it, they get just the blank form.) In order to be able to save the form data with the form, the user must have the full Adobe Acrobat program (which most users do not). Because of this limitation, PDF forms are really best used in environments where everyone has the full Adobe Acrobat program. This is not the case at SNC – although everyone does have the free Adobe Reader program, most do not have the full Adobe Acrobat program.

PDF forms are best for when you:

- only need to distribute the form to people who you know have the full Adobe Acrobat program
- only need to distribute the form to a small group of people to whom you can explain the form & how it works (otherwise people may be confused by the limitations)
- want people to be able to print the form, but do not care if they are able to save it
- want the form to retain its original formatting
- know the exact type & size of data users will be putting into the form fields (you need to know that what they type will not exceed the size of the field, or else the contents of the box will scroll & will not all print)
- want the form submitted to you in paper, so that you can keep a printed copy of the form on record

Adobe Reader vs. Adobe Acrobat

The Adobe Reader and the full Adobe Acrobat program are two separate programs.

Adobe Acrobat Reader	Adobe Acrobat
<ul style="list-style-type: none">▪ Allows viewing, saving, and printing of PDF files, but <i>cannot</i> create them▪ Allows filling in and printing of PDF forms, but <i>not</i> saving form data▪ Free from Adobe▪ Already installed on most campus computers	<ul style="list-style-type: none">▪ Allows the creation and minor editing of PDF files (in addition to viewing, saving, and printing them)▪ Allows filling in, printing, and saving of completed Acrobat forms with form data▪ Must be purchased▪ Installed on lab computers

Creating PDF files

To create PDF files, you either need the full version of Adobe Acrobat or another program. Few people really need the additional features of the full Adobe Acrobat program. (Contact the Help Desk to discuss whether you need Adobe Acrobat for your work.) We use a free PDF-creation program called PrimoPDF. For PrimoPDF instructions, see the handout *Creating PDF Files with PrimoPDF*, at <http://www.snc.edu/techsupport>.

Editing PDF files

It is important to realize that the Adobe PDF format is an *output* format, meaning that it is not intended to be edited beyond very minor fine-tuning. In order to change an PDF file, you will need to edit the original file in the original program (e.g., Microsoft Word), and then create a new PDF file, replacing the old one.

Assistance and questions

If you have any questions or need more information, please call the Help Desk at (920) 403-HELP (4357), contact us via e-mail at helpdesk@snc.edu, or stop by the Help Desk in Cofrin 101. The Help Desk is for St. Norbert College students and employees only.