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ADVANCED ACROBAT PRO DC

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...it's all about you

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INTRODUCTION AND OVERVIEW

Welcome to TeachUcomp, Inc.'s Mastering Acrobat Made Easy™ v.Pro DC course. This class introduces the student to Adobe Acrobat, a powerful program that creates and edits PDF documents. PDF stands for “portable document format.” Because PDF documents can be viewed by anyone who has installed the free Adobe Reader application, it is not necessary for a user to have the same application which created a PDF document to see the contents of the PDF document. PDF files preserve the integrity of graphics and text, and render them accurately when viewed on another device, regardless of the settings or preferences of the device. PDFs can contain many different types of information, from text and photographs to sound clips and video.

This part of the course is designed to give a student with an introductory knowledge of the program an advanced knowledge of Adobe Acrobat Pro DC.

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CHAPTER 11-

COLLABORATING

11.1- METHODS OF COLLABORATING

11.2- SENDING FOR EMAIL REVIEW

11.3- SENDING FOR SHARED REVIEW

11.4- REVIEWING DOCUMENTS

11.5- ADDING COMMENTS AND ANNOTATIONS

11.6- THE COMMENT PANE

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11.9- USING DRAWING TOOLS

11.10- STAMPING AND CREATING CUSTOM STAMPS

11.11- IMPORTING CHANGES IN A REVIEW

11.12- USING TRACKER TO MANAGE PDF REVIEWS

11.1- Methods of Collaborating:

In addition to being a powerful tool for creating PDF documents, Acrobat DC can also be used to collaborate with others. Collaboration is most commonly done as part of a document review process. No matter which of the collaboration tools are used in the review, or how many people are part of the review, the basic workflow process is the same. A review initiator makes a PDF document available to other participants, the participants review and comment on the PDF, and the comments are collected by the initiator of the review either manually or automatically.

PDFs can be shared with reviewers using two different methods: email review or shared document review. When you initiate either type of review, Acrobat launches a small program, generally called a “wizard,” to guide you through the process of sharing the PDF document with other reviewers. For server-based shared document reviews, Acrobat tracks responses received from reviewers using a feature called “Tracker.” The “Tracker” feature allows you to manage shared PDF reviews and even lets you set a deadline for commenting, after which no more comments can be published. For email review, you must manually import back into your original PDF any comments made in copies of the PDF that you share with the reviewers. For both methods, reviewers can add comments to the PDF using either Acrobat or Adobe Reader, as long as the security settings of the document allow adding comments.

11.2- Sending for Email Review:

You can send a PDF document to reviewers using an email-based review process. This type of document review is most effective when only a few people are reviewing a document. Comments made to a shared PDF using this method must be manually imported back into the originating PDF by the review initiator. Before initiating an email document review, make sure that your email application is configured so that it works with Acrobat. To start an email review, open the PDF to share in Acrobat, and then select the “Send for Comments” tool from the “Review & Approve” section of the Tools Center. The “Send for Comments” screen is displayed. Click the “Send for Comments by Email” button found in the Send for Comments toolbar.

The first time you initiate a shared PDF review in Acrobat, the “Identity Setup” dialog box launches, and you can enter identifying information about yourself so that the reviewers will know who has initiated the review. At a minimum, you must enter a valid email address into the “Email Address” field to proceed. After entering the identifying information, click the “Complete” button.

In the “Getting Started” screen of the wizard that appears, the file name of the currently opened PDF is automatically shown in the “Specify a PDF file to Send by Email for Review” drop-down menu. To share a different PDF instead, click the adjacent “Browse...” button to launch an “Open” dialog box where you can find and select a different PDF to share. Then click the “Open” button to add it to the drop-down field. After selecting a PDF, click the “Next” button. The selected PDF becomes the “Master File,” and the “Invite Reviewers” screen is displayed.

In the “Invite Reviewers” screen, you can type one or more email addresses into the large text field shown. These are the email addresses of the reviewers to whom the PDF will be sent. You must enter at least one valid email address to continue. Many users enter their own email address into the list as well. This can be helpful when learning to use the document review features in Acrobat, because it will allow you to see exactly what reviewers receive when invited to participate in a managed email review. To enter multiple email addresses, enter one e-mail address on a line and then press the “Enter” key on your keyboard to move to the next line, where you can type the next email address. You then repeat this to enter one email address on each line. Alternately, you can click the “Address Book” button to open the Address

11.2- Sending for Email Review- (cont'd.):

Book for your associated email application, which you can use to select the email addresses of the reviewers, if available. Then click the “To” button to add the selected email addresses. Then click the “OK” button in the “Address Book” after selecting your email addresses to add them to the large white text box in the “Invite Reviewers” screen. After entering all of the email addresses of reviewers, click the “Next” button.

In the “Preview Invitation” screen, Acrobat will generate both an email subject title and a standard invitation message. You can highlight the text in either the “Subject” or “Message” fields and add to or replace the default text with your own. You must, however, send the exact same message to all recipients of the invitation. When you have made your changes, click the “Send Invitation” button to finish.

At that point, the “Send Email” dialog box opens so that you can select an email application to use. After making your selection, click the “Continue” button. If you selected your default email software application, then the “Outgoing Message Notification” message box launches to signify that the email invitations have been created. This message box lets you know that based on the send and receive settings of the selected email application, you may need to manually send the invitations. Read the message and then click the “OK” button to close it. If needed, open your email application and manually send the invitations to the reviewers.

When reviewers receive the email invitations, the PDF is included as an email attachment. When a reviewer opens the PDF using Acrobat or Adobe Reader, it will launch the PDF file and show commenting tools with reviewing instructions. As reviewers make comments and reply to you via email by clicking the “Send Comments” button in the PDF, you can open their received email attachments to import comments into your master PDF file. In this type of document review process, participating reviewers cannot see the comments of other reviewers or interact with other reviewers.

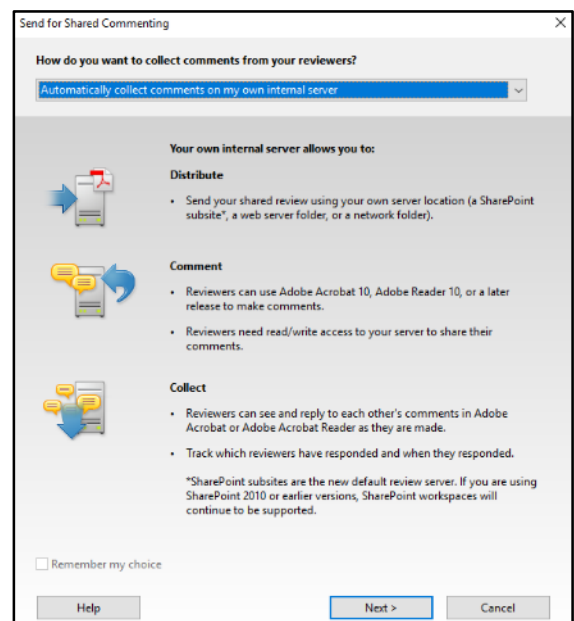
11.3- Sending for Shared Review:

You can initiate a “shared document review,” in which all participants can view and respond to others’ comments. Shared reviews are usually more effective than email reviews if many people will be participating in the document review.

The shared review process creates a copy of the file on a shared server location of your choosing which allows others to comment and collaborate on the shared PDF directly. The shared file will be named the same as the original, but with a “_review” added to the file name.

To initiate a shared review, open the PDF to share and review and then select the “Send for Comments” tool from the “Review & Approve” section of the Tools Center. The “Send for Comments” screen is displayed. Click the “Send for Shared Commenting” button found in the Send for Comments toolbar. The “Send for Shared Commenting” screen is displayed.

The “Send for Shared Commenting” wizard will pose questions to you on each screen. Answer the questions, make any choices needed, and provide it with the requested information in each screen.



11.3- Sending for Shared Review- (cont'd.):

When finished within a screen, click the “Next” button at the bottom of the wizard to proceed to the next screen. If needed, you can click the “Previous” button to return to a previous screen and change your answers. When you have finished, click the “Send” button to save the PDF to a shared location and send notifications to the selected users to review the file. Note that if you are publishing a document that already contains markups or comments, you will see a message box appear after clicking the “Send” button that asks if you want to publish the existing comments to the review server as the author. You can click “Yes” or “No,” as desired.

Acrobat will save the setting choices that you make within this wizard into a sharing server configuration file that you can select from the drop-down on the first screen of the wizard in the future to share another PDF using the same shared reviewing settings. That way you will only need to step through the wizard again if you want to share the file in a new way using a different server configuration.

To delete a saved server sharing configuration file that you no longer use, select “Edit| Preferences...” from the Menu Bar to open the “Preferences” dialog box. Select the “Tracker” category at the left side of the dialog box. Then select the sharing configuration to delete from the “Remove Custom Server Locations” drop-down in the area to the right. Then click the “Remove Server Profile” button to the right of the drop-down and click “Yes” in the message box that appears to delete the selected server sharing profile. Then click the “OK” button at the bottom of the “Preferences” dialog box to save your changes.

11.4- Reviewing Documents:

To review a shared PDF that has been sent to your email account via an email review, open the PDF attachment within the email using Adobe Acrobat 6 or Adobe Reader 7, or later. Then make any comments needed within the PDF and click the “Send Comments” button to open a “Send Comments” dialog box. The recipient's email address and default subject and message text will appear within the “Send Comments” dialog box that launches. You can click into the message text to add any additional text, if needed. Then click the “Send” button to open a “Send Email” dialog box. Select the email application you want to use to send the PDF within this dialog box and then click the “Continue” button to send the email, with the reviewed PDF attached, back to the recipient.

To review a document sent for shared review, open the shared review PDF using either Adobe Acrobat 10 or Adobe Reader 10, or later, to conduct a review. More recent versions of Acrobat and Adobe Reader will have more shared review commenting options, so using the more recent versions is recommended. When the PDF is opened, a message box will appear that says, “Click to connect to the shared review of [shared review document name].” Click the “Connect” button within this message box to connect to the shared document.

In the next screen, enter the information which will identify you to other reviewers: “Email Address,” “Name,” “Title” and “Organization Name.” The “Email Address” and “Name” are required fields. Then click the “OK” button. The “Welcome to Shared Review” screen launches, showing you your review status, profile and a list of other reviewers. Click the “OK” button.

You can now add comments and markups to the shared document using the “Comments & Markup” tools within the application you used to open it. You can check for new comments as you are working by clicking the “Check for New Comments” button in the yellow message bar at the top of the PDF window. When you are done reviewing the shared document, click the “Publish Comments” button in the yellow message bar at the top of the PDF window. Adobe will display a message indicating that the comments were published and they can then be viewed by other reviewers.

11.5- Adding Comments and Annotations:

As long as a PDF doesn't have security features applied to restrict commenting, you can add comments to any PDF file using Acrobat. Usually, comments are added by document reviewers as messages to the author of the PDF. However, some people also use commenting tools to write notes to themselves while creating PDFs.

To access Acrobat's commenting tools, select "Comment" from the "Review & Approve" section of the Tools Center. The "Comment" screen is displayed. Commenting tools are found in the "Comment" toolbar. The appearance of the Comment toolbar changes based on whether you elect to show or hide the toolbar's button labels.

By default, Acrobat does not display button labels. However, if you right-click in the "empty" area of the toolbar, a pop-up menu allows you to check the "Show All Labels" feature. When the "Show All Labels" option is checked, the tools that are not immediately visible in the toolbar are found in the "Options" button on the far right of the toolbar. For this lesson, leave the "Show All Labels" feature checked, so that button names appear in the toolbar.

In the Comment toolbar, you'll see buttons for adding sticky notes, highlights, text effects, drawings, and even stamps to PDFs. You can even attach files to a PDF using the commenting tools, or add an audio recording as a comment. Most comments added to a PDF contain two parts: The icon or markup that appears on the PDF page, and the text that appears as a pop-up message when the comment is selected. The panel on the right side of the "Comment" screen displays comments added to the PDF.

The "sticky note" is a tool used to apply a comment anywhere you would like to place it within the PDF pages. To add a sticky note to a PDF, click the "Add sticky note" button in the Comment toolbar. The pointer will change into a speech bubble tool, and you can click in the PDF page at the spot where you want the sticky note to appear. A pop-up sticky note is then shown onscreen containing your reviewing identity name, along with the date and time that the note was created.

Type the text comment for the sticky note within the text field shown. You can click and drag the border of the sticky note to move it within the page. To resize the note, place your mouse pointer over the bottom corners of the note until you see a double-pointed arrow appear, and then click and drag. When you're done adding text, click back into the PDF document.

The Comment pane reflects the addition of the new sticky note. Within the PDF document window, the sticky note box disappears, but the small sticky note markup icon remains on the PDF page to alert viewers that there is a comment relating to this page. They can see the comment appear when they hold their mouse pointer over the comment in the PDF page. You can double-click the markup icon to display the sticky note comment box again, if needed.

You can click the "Highlight text" tool in the Comment toolbar, and then click and drag over text within a PDF page to highlight it.

To underline text as a commenting markup, click the "Underline text" tool found in the Comment toolbar, and then click and drag over text within a PDF to underline text.

To mark text that must be removed from a PDF, click the "Strikethrough text" button in the Comment toolbar, and then click and drag over text within the PDF. The selected text remains part of the PDF, but appears with a red strikethrough line.

You can also markup text in a PDF that needs to be replaced. To do this, click the "Replace Text" button found in the Comment toolbar. Next, click and drag over the text in the PDF that will be replaced. A blue strikethrough line appears over the selected text, and a pop-up note appears onscreen. Type the replacement text into the note, and then click "Post."

To make a note about text that must be added to the PDF, click the "Insert Text" button found in the Comment toolbar. Next, click the spot on the PDF where new text should appear. An "Inserted Text" markup

11.5- Adding Comments and Annotations- (cont'd.):

icon appears where you clicked, and a pop-up note appears onscreen. Type the text that should be added, and then click “Post.”

To add a text comment to a PDF, click the “Add text comment” button found in the Comment toolbar, and then click the spot on the PDF where you want the comment to appear. Type your comment, and then format the text using the small pop-up toolbar that appears. Unlike a sticky note, text comments are displayed on the PDF.

When you roll your mouse pointer over the comment, you should see a blue bounding box appear. You can click and drag the bounding box to move the text comment within the page. You can place your mouse pointer over the resizing handles that appear on the border of the bounding box and then click and drag to resize the text box. You can place your mouse pointer directly over the text within the box and click into it to edit the text again. You can then click into the PDF page again to stop editing the text.

You can also add a text box comment to a PDF. To do this, click the “Add text box” button found in the Comment toolbar, and then click the spot on the PDF where you want the text box to appear. A text box with a red outline is placed onto the PDF. Type your comment into the text box. Keep in mind that text box markups cannot be formatted like text comment markups. When you add a text box comment to a PDF, the markup appears as red text on a white background.

The “Draw” tool allows you to add freeform markups to a PDF. To use this tool, click the “Draw” button found in the Comment toolbar. The cursor turns into a pencil tool, and you can click and drag within the PDF to make markups on the document. This feature is helpful for those using Acrobat with a touchscreen device.

If you want to remove drawing markups from a PDF, click the “Erase Drawing” button found in the Comment toolbar. The cursor turns into an eraser tool, and you can click and drag to remove any drawing markups on the PDF. As you click and drag, the screen displays portions of the drawing markup that will be removed from the PDF. When you let go of the mouse button, the markups are removed.

You can click the “Add stamp” tool in the Comment toolbar to add a stamp to the PDF page. After clicking this tool, click the stamp to apply by scrolling through choices shown in the drop-down menu. You will then see the stamp appear as a transparent image when you place your mouse pointer over the PDF page. Click the desired location in the PDF page to add the stamp to the page. We will discuss using this tool in more detail in a later lesson in this chapter.

To add a file as an attachment to a PDF, select “Add a new attachment| Attach File” from the drop-down menu that appears. Next, click the spot within the PDF where you want the markup for the attachment to appear. The “Add Attachment” dialog box is displayed. Use this dialog box to navigate to, and then select, the file to attach. Then click the “Open” button in the “Add Attachment” dialog box to open the “File Attachment Properties” dialog box.

On the “Appearance” tab, set the “Icon,” “Color,” and “Opacity” of the icon used for the markup. On the “General” tab, you can enter a “Subject” and “Description” for the attached file. Then click the “OK” button to add the markup to the PDF page. A user can double-click the attachment icon to display the “Open File” dialog box if they want to open the file.

You can also add an audio recording markup to a PDF. To do this, select “Add a new attachment| Record Audio” from the drop-down menu that appears. After selecting this tool, click at the place within the PDF page at which you want the markup for the audio file to appear to launch the “Sound Recorder” dialog box. Click the “Record” button in this dialog box to start recording the audio you want to add to the PDF. Then click the “Stop” button to stop the recording when finished.

You can click the “Play” button to play the recording back, if needed. When you are ready to add the audio, click the “OK” button to open the “Sound Attachment Properties” dialog box. On the “Appearance”

11.5- Adding Comments and Annotations- (cont'd.):

tab, set the “Icon,” “Color,” and “Opacity” of the icon used for the markup. On the “General” tab, you can enter a “Subject” and “Description” for the sound file. Then click the “OK” button to add the markup to the PDF page. A user can double-click the audio icon to play the audio recording within the PDF.

You can delete any annotation in the PDF page by right-clicking the markup icon of the annotation to remove and then clicking the “Delete” command in the pop-up menu that appears. Alternately, you can click the markup icon to select it and then press the “Delete” key on your keyboard to delete the annotation. Don't forget to save the PDF in order to preserve comments.

11.6- The Comment Pane:

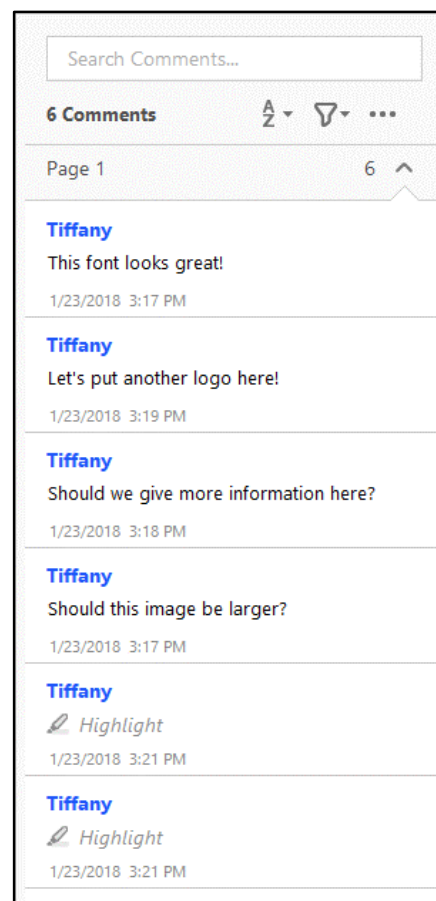
After markups have been added to a PDF, Acrobat displays a list of annotations within the Comment pane. To display the Comment pane, simply select the “Comment” tool from the Tools Center or Tools Pane. Notice that the top of the pane provides a “Search Comments” text field. You can click into this field and then type text that you want to find within a comment to locate comments. Delete the text within the field to display all comments again when finished.

The total number of comments that have been added to the PDF is displayed below the search field, along with three drop-down buttons. You can use the “Sort Comments” drop-down button to sort comments by their page on the PDF, by author, by date added, by the type of comment, by checkmark status, or even by color.

To the right of the “Sort Comments” drop-down, you'll see the “Filter Comments” drop-down button. Unlike the “Sort Comments” feature, which displays all comments, the “Filter Comments” tool allows you to designate which comments will be displayed in the Comment pane. By default, Acrobat is set to “Show All Comments.” If you don't want comments displayed, you can check the “Hide All Comments” option within the “Filter Comments” drop-down. You can also filter comments in number of other ways: You can choose to display only comments made by specific reviewers or display only certain types of comments. You can even filter comments based upon their status or color. However, it's important to keep in mind that filtering comments only removes the appearance of some comments. It doesn't completely remove markups from a PDF.

To the right of the “Filter Comments” tool, the Comment pane provides an “Options” button. You can click this button to access additional commenting features. The commands in this drop-down menu allow you to print a summary of all comments, or export the comments to another application, such as Microsoft Word. The “Options” drop-down menu also gives you access to Acrobat's commenting preferences, where you can adjust many aspects of the commenting and markup process, if desired. These commands will be discussed in the next lesson in this chapter.

You can click a comment within the Comments List panel to select that comment within the PDF page. It appears with a



11.6- The Comment Pane- (cont'd.):

blue border in the PDF page. After selecting a comment in the Comments List, you can click the checkbox in its lower-left corner to mark it as checked. This can help you keep track of reviewed comments. You may also right-click a selected comment and then roll over the “Set Status” command in the pop-up menu that appears. You can then click a status in the side menu of choices shown to set the status of the selected comment. This will make filtering comments by their status more effective.

You can also reply to comments within the Comments List panel. To reply to a comment, click to select the comment in the Comments List panel. The comment is highlighted within the panel, and a “Type your reply...” text field appears at the bottom of the comment. You can click into the text field to type a reply, and then click the “Post” button to add the reply to the comment. Notice that a “reply” icon appears at the top right corner of the comment in the Comment panel. The number that is displayed with this icon indicates the number of replies to the original comment. Keep in mind that if you are using an email-based review process, you will have to email the new file to the comment author before the person will see your reply.

11.7- Advanced Comments List Option Commands:

You can click the “Options” button in the small toolbar at the top of the Comments List panel in the Comment pane to display a drop-down of advanced comment commands. To display the Comment pane, simply choose “Comment” from the Tools Center or Tools Pane.

You can expand and collapse the comments within the Comments List panel by choosing either the “Expand All” or “Collapse All” command from the drop-down menu.

To print the PDF and a content summary page that lists the contents of the comments in the PDF, select the “Print with Comment Summary” command in the drop-down menu to open the “Print” dialog box where you can set your printing settings and then click the “Print” button.

To create a customized comment summary, select the “Create Comment Summary” command from the drop-down menu to open the “Create Comment Summary” dialog box. Select a layout for the comment summary by selecting an option button in the “Choose a Layout” section. You can select a paper size from the “Paper Size” drop-down.

You can sort the comments by making a choice from the “Sort comments by” drop-down. Select a font size to use by selecting the desired option button in the “Font Size” section. In the “Include” section, select the desired option button to choose which comments to include.

You can check or uncheck the “Pages containing no comments” checkbox to include or exclude those pages. You can also specify a page range by entering a page range into the “Pages” section. When you have made your selections, click the “Create Comment Summary” button to create and display the comment summary as a new PDF.

To import comments from another PDF into the current PDF, select the “Import Data File...” command from the drop-down menu to open the “Import Comments” dialog box. Use this dialog box to select the PDF file or FDF file (which is a comments export file type) that contains the comments you want to import and then click the “Open” button. Acrobat automatically imports and embeds comments from the selected file into the Comments List panel. If the comments did not originate in the same document, you may see a message box asking if you want to import the comments. You can click the “Yes” button to import the comments anyway.

To export selected comments to an FDF file, select the desired comments to export in the Comments List panel and then choose the “Export Selected to Data File...” command from the drop-down that appears when you click the “Options” button in the toolbar at the top of the Comments List panel. Use

11.7- Advanced Comments List Option Commands- (cont'd.):

the “Export Comments” dialog box that appears to select where to save the file. Type a name for the file into the “File name” field and then click the “Save” button to save the file as an FDF file, which, as you just saw a moment ago, can then be imported into another PDF file, if needed.

To export all comments into an FDF file, choose the “Export All to Data File...” command from the drop-down menu to open the “Export Comments” dialog box. Use the dialog box to select where to save the file and type a name for the file into the “File name” field. Click the “Save” button to save the file as an FDF file, which, as you just saw previously in this lesson, can then be imported into another PDF file, if needed.

To export the comments in a PDF to Microsoft Word or to AutoCAD, you must have Microsoft Word or AutoCAD installed on your computer. You can then select either the “Export to Word...” command or the “Export to AutoCAD...” command from the drop-down menu to open a wizard that will guide you through the process of exporting the comments to the selected application. If you would like to review the process of importing and exporting comments between Word and Acrobat, you can review the lesson titled “Importing Acrobat Comments in Word” to view the same wizard that you also use to export comments to Word.

11.8- Enabling Extended Commenting in Acrobat Reader:

Newer versions of Adobe Reader include all of the markup and commenting tools included with Acrobat DC. In previous versions of Reader, users only had access to the “Sticky Note” and “Highlight Text” tools unless features had been extended for the PDF in Acrobat.

If you don't know which version of Adobe Reader that reviewers will use, it's a good idea to extend the commenting features of a PDF before sending it for review. To do this, choose “File| Save As Other| Reader Extended PDF| Enable Commenting & Measuring” from the Menu Bar. A dialog box will launch and display information about saving the PDF. Read the information and then click the “OK” button. The “Save As” dialog box launches, and you can name the new file and designate a save location. It is a good idea to choose a file name that gives you an indication that it is the enabled PDF. Then click the “Save” button when you are ready to save the copy with the extended commenting features enabled.

11.9- Using Drawing Tools:

In addition to the basic “Draw” tool that was demonstrated in the “Adding Comments and Annotations” lesson earlier in this chapter, Acrobat DC provides several other drawing markup tools. You can add drawing markups that remain visible on a PDF page at all times, even when the Comments List panel is displayed. With the exception of the “Add text callout” drawing markup tool, the other drawing markups are simple shapes that do not contain text comments by default. However, you can easily add a text comment to any drawing markup, if desired.

To access the drawing markup tools, first click the “Comment” tool in the Tools Center or Tools Pane. By default, drawing tools appear in the Comment toolbar. However, drawing tools may appear in a number of different places, depending on Acrobat's settings. For example, if the “Show All Labels” feature is enabled, the Comment toolbar appears very different. If you don't see drawing markup buttons in the Comment toolbar, click the “Options” button found on the right side of the Comment toolbar. When you move your mouse over the “Drawing Tools” option in the drop-down menu, a side menu of drawing tools appears. You can select any of these tools to make drawing markups on the PDF. You can also select the “Expand Drawing Tools” option to move the drawing tools into the main toolbar choices. To return drawing tools to their original, separate menu, simply click the “Collapse Drawing Tools” button that appears. To

11.9- Using Drawing Tools- (cont'd.):

return drawing markup buttons to the Comment toolbar, right-click the toolbar and then uncheck the “Show All Labels” option.

The “Add text callout” tool will draw a text box with an attached arrow that points to something in the PDF page. To add a text callout, select “Text Callout” from the Drawing Tools. The pointer turns into a crosshair tool. Click the PDF page at the spot that the arrow will point to and then either drag to position the text box or click once again at another location to position the text box. Once the text box has been placed, you can immediately type the text to add to the drawing markup. You can manipulate the text callout just as you manipulate other text elements in Acrobat. You can resize the text box by clicking and dragging on the resizing handles, or you can move the text box by clicking and dragging the border of the box. Note that, when a text callout is selected, that you can also use the resizing handle at the end of the arrow to reposition it within the page, if needed. You will find that you can use these same techniques to move and resize all of the drawing markup shapes shown in this lesson. To delete any drawing markup, click its border to select it and then press the “Delete” key on your keyboard or right-click the markup and then choose the “Delete” command in the pop-up menu that appears.

The other drawing markup tools allow you to add shapes to PDF documents. Keep in mind that you can also use the “Draw freeform” and “Erase Drawing” tools found in the Comment toolbar to draw and erase freeform images within a PDF. To flip an arrow that you have drawn when using the “Draw arrow” drawing markup tool, you can right-click the arrow and then select the “Flip Line” command in the pop-up menu to flip the arrow pointer to the other end.

You can right-click a drawing markup in the PDF and choose the “Properties...” command in the pop-up menu that appears to open the “Properties” dialog box for the selected shape. You can change the appearance of the shape by clicking the “Appearance” tab and then changing the settings shown to adjust settings such as the “Style,” “Color,” “Opacity,” “Thickness,” and “Fill Color.” Note that the exact properties available will change, depending on the shape selected. Make any changes you want to apply on this tab and then click the “OK” button.

To add a text pop-up note to any drawing markup, right-click the drawing markup to which you want to add text and then select the “Open Pop-Up Note” command in the pop-up menu that appears. A small pop-up text window appears, like the ones associated with the other text annotations. Type the text to associate with the drawing markup into the pop-up note and then click into the PDF to set the pop-up note.

11.10- Stamping and Creating Custom Stamps:

The “Add stamp” tool in the Comment toolbar is used to place a stamp into a PDF page. Acrobat comes with several preset stamps that are commonly used in business, such as stamps for approving a document or indicating where a user needs to add a signature to a document. You can also create your own custom stamps, if needed.

To add a preset stamp to the current PDF page, select “Comment” from the Tools Center or Tools Pane. The Comment toolbar is displayed. Click the “Add stamp” drop-down button found in the Comment toolbar. The drop-down menu that appears contains three categories of stamps: Dynamic stamps, stamps for signing documents, and standard business stamps. When you roll your mouse over one of these three categories, the available stamps are displayed. Notice that the “Dynamic” stamps all include custom messaging related to the current time, date, or Acrobat user. The “Sign Here” stamps provide common messages related to signing and initialing documents. The “Standard Business” stamps include a variety of messages commonly used in business settings.

11.10- Stamping and Creating Custom Stamps- (cont'd.):

To add a stamp to a PDF, click to select a stamp from one of the “Add stamp” drop-down categories. The mouse pointer changes to display a semi-transparent image of the stamp. Remember, once placed, the stamp will appear somewhat opaque. In other words, text or images under the stamp may be difficult to see, once the stamp is applied. Choose an appropriate spot on the PDF, and click to place the stamp.

Note that the “Identity Setup” dialog box will appear and prompt you to enter your identity information, if you haven’t entered that information already, after selecting a stamp from the “Dynamic” stamp category.

To add a stamp to the “Favorite” stamps list shown at the top of the drop-down menu that appears when you click the “Add stamp” tool, select the stamp to use in the drop-down menu. Then immediately select the “Add stamp” tool button again and select the “Add Current Stamp To Favorites” command in the drop-down menu.

To create a custom stamp from an existing image file, click the “Add stamp” tool, roll over the “Custom Stamps” command, and then choose the “Create...” command within the side menu to open the “Select Image for Custom Stamp” dialog box. Click the “Browse...” button to find the image file to use for the custom stamp. Use the file format drop-down in the lower-right corner of the dialog box to select the type of image files to view, if needed. After finding the image file, click it to select it and then click the “Open” button to return to the “Select Image for Custom Stamp” dialog box. Click the “OK” button in this dialog box to open the “Create Custom Stamp” dialog box. You can choose to add the stamp to one of Acrobat’s existing stamp categories by selecting one from the “Category” drop-down, or you can create a new category for your stamp by typing a new category name into this drop-down field. Type a name for the stamp into the “Name” field. Ensure that there is a checkmark in the “Down sample stamp to reduce file size” checkbox to ensure the stamp is not too large. When finished, click the “OK” button to create the custom stamp.

You can also create a temporary stamp from the contents of an image file you have copied to your Clipboard to create a one-time use type of stamp in a PDF. To do this, copy the image file you want to apply as a stamp using your image editing software. Then click the “Add stamp” tool and select the “Paste Clipboard Image as Stamp Tool” command. Then click into the document at the location at which you want to stamp the copied image file.

11.11- Importing Changes in a Review:

When you receive the reviewer’s copies of the shared PDF sent for an email review, you can double-click the attachments within the received emails to open the PDF that contains the reviewer’s markups. Acrobat will display the “Merge Comments?” message box that lets you know that this is a copy of a PDF that is tracked for review and that it may contain markups and comments. It then asks if you would like to open the tracked PDF and merge any comments and markups from the attachment PDF into the original PDF. To merge the comments and markups into the original PDF, click the “Yes” button. To only open the copy so you can review the comments and markups prior to merging, click the “No, open this copy only” button. You can then review the comments and markups received from this reviewer in Adobe Acrobat. When you are satisfied with the comments and markups after reviewing them, you can then click the “Merge Comments” button in the yellow message bar at the top of the PDF window to merge the comments into the original, tracked PDF file. Acrobat will then open the original PDF and merge the comments from the copy into it. After completing the merge, Acrobat will inform you of that fact in a message box. Click “OK” to close the message box. You can see the merged comments shown in the “Comments List” panel in the “Comment” pane in the Task Pane. You can then save and close the original

11.11- Importing Changes in a Review- (cont'd.):

PDF file in Acrobat.

When working with a PDF using the shared document review feature, you simply click the “Check for New Comments” button in the yellow taskbar at the top of the shared document’s PDF window to check for newly published comments within the shared document. Acrobat will display a summary pop-up of any comments that were added or removed to the document and the comments will automatically appear within the PDF.

After the review has ended, you may want to save an archive copy of the file. To do this, you can click the “Save an Archive Copy” button that appears in the yellow taskbar at the top of the PDF file only after the review has ended to open a “Save and Work Offline” dialog box. Use this dialog box to select the location to which you want to save the file. The file name will default to the original file name with “_archive” added to the end of it. You can then click the “Save” button in the dialog box to save the archive copy. This copy will contain all of the comments in the file as of the time the archive copy was created. Note that you can also save an archive copy at any time during the review process, if needed, by clicking the “Server Status” button in the yellow taskbar at the top of the PDF window and then selecting the “Save as Archive Copy...” command from the drop-down menu that appears.

11.12- Using Tracker to Manage PDF Reviews:

You can manage all of the documents that you currently have out for review by using the Tracker feature within Acrobat. To view the Tracker window, open Acrobat and select “Send for Comments” from the Tools Center. The “Send for Comments” screen displays the “Send for Comments” toolbar. Click the “Track Comments” button found in the “Send Comments” toolbar. Alternatively, select “View| Tracker...” from the Menu Bar to open it. The “Tracker” dialog box then appears.

The Tracker window displays content in the right pane for the item selected in the left pane. The “Latest Updates” item is selected when you open this window and shows the latest updates on your reviewed file in the area to the right. You can click the small downward-pointing arrows next to the items in the left pane to expand and collapse the sections shown. The items shown in the left pane, from top to bottom, are “Reviews,” “Sent,” “Joined,” “Forms,” “Distributed,” “Received,” and “Server Status.” The documents that you have sent for review will appear under the “Sent” category in the “Review” section. Reviews you have joined as a reviewer will appear under the “Joined” section of the “Review” section. To view the updates for a specific review you have sent, select the name of the file shown in that section to display its status in the area at the right side of the Tracker window. At the top of the right side of the window, you can then click the “View Comments” or “File Location” hyperlinks to open the PDF and display it within Acrobat.

For shared document reviews, you can also click the “Change Deadline” hyperlink in this same section to open the “Change Deadline” dialog box. In this dialog box you will see the names of the current reviewers shown in the “To” field. You can edit or add addresses shown in the “To” and “Cc” fields, if needed. Then click the “Review Deadline” hyperlink in the lower-left corner of this dialog box to open the “Change Review Deadline” dialog box. You can then select the “New review deadline” option button and use the adjacent drop-downs to set the new review deadline date and time or you can select the “No deadline” option button to remove any deadline from the review. Then click the “OK” button to change the deadline. Then click the “Send” button to email the reviewers regarding the deadline change. You can then use the “Send Email” dialog box to send the emails and click “OK” in the Change Deadline” message box that appears.

11.12- Using Tracker to Manage PDF Reviews- (cont'd.):

To end a shared document review, click the “End Review” hyperlink in the Tracker window for the selected PDF file. Then click “Yes” in the Adobe Acrobat message box that appears to end the review after reading the message. Note that you can restart a review by extending the deadline, if needed.

In the “Reviewers” section at the right side of the Tracker window, you can click the “Email All Reviewers” hyperlink to email all reviewers of the PDF during a review. To start a new shared document review using the same reviewers of the currently selected PDF review, click the “Start New Review with Same Reviewers” hyperlink to open the “Send for Shared Review” dialog box. You fill it out as you normally would, but note that this time the reviewers’ email addresses will already appear when you send the invitations for the PDF review. You may also individually email a reviewer by clicking their email link shown in the right pane of the Tracker window.

After a PDF review is closed and you no longer wish to use the Tracker window to track the review, you can click the PDF review to remove within the left pane of the Tracker window and then click the “Remove selected files or folders from Tracker” button, which looks like a trash can icon, at the bottom of the left pane to remove the file from the Tracker window. You can then click the “Yes” button in the confirmation message box that appears to remove the file from the Tracker window.

Note that you can also select a shared document server shown in the “Server Status” section of the left pane of the Tracker window to view the connectivity and update status of the servers to which you have saved shared review documents. If a server name appears here with a yellow exclamation mark icon, that means that there were connectivity or updating issues with the server that you should investigate to ensure that the comments are being published correctly.

To close the Tracker window when you are finished using it, click the “X” in the upper-right corner of the window.

ACTIONS- COLLABORATING

SENDING FOR EMAIL REVIEW:

1. **To start an email review**, open the PDF to share in Acrobat and then select the “Send for Comments” tool from the “Review & Approve” section of the Tools Center.
2. Then click the “Send for Comments by Email” button found in the Send for Comments toolbar.
3. The first time you initiate a shared PDF review in Acrobat, the “Identity Setup” dialog box launches, and you can enter identifying information about yourself so that the reviewers will know who has initiated the review. At a minimum, you must enter a valid email address into the “Email Address” field to proceed. After entering the identifying information, click the “Complete” button.
4. In the “Getting Started” screen of the wizard that appears, the file name of the currently opened PDF is automatically shown in the “Specify a PDF file to Send by Email for Review” drop-down menu.
5. **To share a different PDF instead**, click the adjacent “Browse...” button to launch an “Open” dialog box where you can find and select a different PDF to share. Then click the “Open” button to add it to the drop-down field.
6. After selecting a PDF, click the “Next” button.
7. In the “Invite Reviewers” screen, you can type one or more email addresses into the large text field shown. These are the email addresses of the reviewers to whom the PDF will be sent. You must enter at least one valid email address to continue. Many users enter their own email address into the list as well.
8. **To enter multiple email addresses**, enter one e-mail address on a line and then press the “Enter” key on your keyboard to move to the next line, where you can type the next email address. You then repeat this to enter one email address on each line.
9. Alternately, you can click the “Address Book” button to open the Address Book for your associated email application, which you can use to select the email addresses of the reviewers, if available. Then click the “To” button to add the selected email addresses. Then click the “OK” button in the “Address Book” after selecting your email addresses to add them to the large white text box in the “Invite Reviewers” screen.
10. When you have entered all of the email addresses of reviewers, click the “Next” button.
11. In the “Preview Invitation” screen, Acrobat will generate both an email subject title and a standard invitation message. You can highlight the text in either the “Subject” or “Message” fields and add to or replace the default text with your own.
12. When you have made your changes, click the “Send Invitation” button to finish.
13. At that point, the “Send Email” dialog box opens so that you can select an email application to use. After making your selection, click the “Continue” button.
14. If you selected your default email software application, then the “Outgoing Message Notification” message box launches to signify that the email invitations have been created. This message box lets you know that based on the send and receive settings of the selected email application, you may need to manually send the invitations. Read the message and then click the “OK” button to close it. If needed, open your email application and manually send the invitations to the reviewers.
15. When reviewers receive the email invitations, the PDF is included as an email attachment. When a reviewer opens the PDF using Acrobat or Adobe Reader, it will launch the PDF file and show commenting tools with reviewing instructions. As reviewers make comments and reply to you via email by clicking the “Send Comments” button in the PDF, you can open their received email attachments to import comments into your master PDF file.

ACTIONS- COLLABORATING

SENDING FOR SHARED REVIEW:

1. **To initiate a shared review**, open the PDF to share and review and then select the “Send for Comments” tool from the “Review & Approve” section of the Tools Center.
2. Click the “Send for Shared Commenting” button found in the Send for Comments toolbar.
3. This wizard will pose questions to you on each screen. Answer the questions, make any choices needed, and provide it with the requested information in each screen.
4. When finished within a screen click the “Next” button at the bottom of the wizard to proceed to the next screen.
5. If needed, you can click the “Previous” button to return to a previous screen and change your answers.
6. When you have finished, click the “Send” button to save the PDF to a shared location and send notifications to the selected users to review the file.
7. Note that if you are publishing a document that already contains markups or comments, you will see a message box appear after clicking the “Send” button that asks if you want to publish the existing comments to the review server as the author. You can click “Yes” or “No,” as desired.
8. Acrobat will save the setting choices that you make within this wizard into a sharing server configuration file that you can select from the drop-down on the first screen of the wizard in the future to share another PDF using the same shared reviewing settings. That way you will only need to step through the wizard again if you want to share the file in a new way using a different server configuration.
9. **To delete a saved server sharing configuration file that you no longer use**, select “Edit| Preferences...” from the Menu Bar to open the “Preferences” dialog box.
10. Select the “Tracker” category at the left side of the dialog box.
11. Then select the sharing configuration to delete from the “Remove Custom Server Locations” drop-down in the area to the right.
12. Then click the “Remove Server Profile” button to the right of the drop-down and click “Yes” in the message box that appears to delete the selected server sharing profile.
13. Then click the “OK” button at the bottom of the “Preferences” dialog box to save your changes.

REVIEWING DOCUMENTS:

1. **To review a shared PDF that has been sent to your email account via an email review**, open the PDF attachment within the email using Acrobat 6 or Adobe Reader 7, or later.
 2. Make any comments needed within the PDF and click the “Send Comments” button to open a “Send Comments” dialog box.
 3. The recipient's email address and default subject and message text will appear within the “Send Comments” dialog box that launches.
 4. You can click into the message text to add any additional text, if needed.
 5. Then click the “Send” button to open a “Send Email” dialog box.
 6. Select the email application you want to use to send the PDF within this dialog box and then click the “Continue” button to send the email, with the reviewed PDF attached, back to the recipient.
 7. **To review a document sent for shared review**, open the shared review PDF using either Acrobat 10 or Adobe Reader 10 or later to conduct a review.
 8. When the PDF is opened, a message box will appear that says, “Click to connect to the shared review of [shared review document name].”
 9. Click the “Connect” button within this message box to connect to the shared document.
- (cont'd.)

ACTIONS- COLLABORATING

REVIEWING DOCUMENTS- (CONT'D.):

10. In the next screen, enter the information which will identify you to other reviewers: "Email Address," "Name," "Title" and "Organization Name." The "Email Address" and "Name" are required fields.
11. Then click the "OK" button.
12. The "Welcome to Shared Review" screen launches, showing you your review status, profile and a list of other reviewers.
13. Click the "OK button."
14. You can now add comments and markups to the shared document using the "Comments & Markup" tools within the application you used to open it.
15. **To check for new comments as you are working**, click the "Check for New Comments" button in the yellow message bar at the top of the PDF window.
16. When you are done reviewing the shared document, click the "Publish Comments" button in the yellow message bar at the top of the PDF window.
17. Adobe will display a message indicating that the comments were published and they can then be viewed by other reviewers.

ADDING COMMENTS AND ANNOTATIONS:

1. **To access Acrobat's commenting tools**, select "Comment" from the "Review & Approve" section of the Tools Center.
 2. **To add a sticky note**, choose the "Add sticky note" tool in the Comment toolbar.
 3. Click in the PDF page at the spot where you want the sticky note to appear. A pop-up sticky note is then shown onscreen.
 4. Type the text comment for the sticky note within the text field shown.
 5. **To move a sticky note**, click and drag the border of the sticky note to move it within the page.
 6. **To resize the note**, place your mouse pointer over the bottom corners of the note until you see a double-pointed arrow appear, and then click and drag.
 7. When you're done adding text, click back into the PDF document.
 8. The Comment pane reflects the addition of the new sticky note. In the PDF document window, the sticky note disappears, but the markup icon remains to alert viewers that there is a comment on this page.
 9. The comment appears when they hold their mouse pointer over the comment in the PDF page.
 10. You can double-click the markup icon to display the sticky note comment box again, if needed.
 11. **To highlight text**, click the "Highlight text" tool in the Comment toolbar, and then click and drag over text within a PDF page to highlight it.
 12. **To underline text as a commenting markup**, click the "Underline text" tool found in the Comment toolbar, and then click and drag over text within a PDF to underline text.
 13. **To mark text that must be removed from a PDF**, click the "Strikethrough text" button in the Comment toolbar, and then click and drag over text within the PDF. The selected text remains part of the PDF, but appears with a red strikethrough line.
 14. **To markup text in a PDF that needs to be replaced**, click the "Replace Text" button found in the Comment toolbar, and then click and drag over the text in the PDF that will be replaced.
 15. A blue strikethrough line appears over the selected text, and a pop-up note appears onscreen.
 16. Type the replacement text into the note, and then click "Post."
- (cont'd.)

ACTIONS- COLLABORATING

ADDING COMMENTS AND ANNOTATIONS- (CONT'D.):

17. **To make a note about text that must be added to the PDF**, click the “Insert Text” button found in the Comment toolbar.
18. Then click the spot on the PDF where new text should appear.
19. An “Inserted Text” markup icon appears where you clicked, and a pop-up note appears onscreen.
20. Type the text that should be added, and then click “Post.”
21. **To add a text comment**, click the “Add Text Comment” tool in the Comment toolbar.
22. Click the spot on the PDF where you want the comment to appear.
23. Type your comment, and then format the text using the small pop-up toolbar that appears.
24. **To move a text comment within the page**, click and drag the comment’s bounding box.
25. **To resize a text box**, click and drag the resizing handles that appear on the border of the bounding box.
26. **To edit the text in a text comment**, place your mouse pointer directly over the text within the box and click into the box.
27. Edit the text in the comment.
28. Then click into the PDF page again when you are finished editing the text.
29. **To add a text box comment to a PDF**, click the “Add text box” button found in the Comment toolbar and then click the spot on the PDF where you want the text box to appear.
30. A text box with a red outline is placed onto the PDF. Type your comment into the text box.
31. **To use the “Draw” tool**, click the “Draw” button found in the Comment toolbar. The cursor turns into a pencil tool.
32. Click and drag within the PDF to make markups on the document.
33. **To remove drawing markups from a PDF**, click the “Erase Drawing” button found in the Comment toolbar.
34. The cursor then turns into an eraser tool.
35. Click and drag to remove drawing markups on the PDF.
36. As you click and drag, the screen displays portions of the drawing markup that will be removed from the PDF.
37. When you let go of the mouse button, the markups are removed.
38. **To access Acrobat’s stamping tools**, click the “Add stamp” tool in the Comment toolbar.
39. Next, click the stamp to apply by scrolling through choices shown in the drop-down menu.
40. The stamp then appears as a transparent image when you place your mouse pointer over the PDF page.
41. Click the desired location in the PDF page to add the stamp to the page.
42. **To add a file as an attachment to a PDF**, select “Add a new attachment| Attach File” from the drop-down menu that appears.
43. Click the spot within the PDF where you want the markup for the attachment to appear.
44. Use the “Add Attachment” dialog box to find and select the file to attach.
45. Then click the “Open” button in the dialog box.
46. The “File Attachment Properties” dialog box is displayed.
47. On the “Appearance” tab, set the “Icon,” “Color,” and “Opacity” of the icon used for the markup.
48. On the “General” tab, enter a “Subject” and “Description” for the attached file, if desired.
49. Then click the “OK” button to add the markup to the PDF page.
50. **To add an audio recording markup to a PDF**, select “Add a new attachment| Record Audio” from the drop-down menu that appears.
51. Click at the place within the PDF page at which you want the markup for the audio file to appear.

(cont’d.)

ACTIONS- COLLABORATING

ADDING COMMENTS AND ANNOTATIONS- (CONT'D.):

52. Click the “Record” button in the “Sound Recorder” dialog box to start recording the audio you want to add to the PDF.
53. Then click the “Stop” button to stop the recording when finished.
54. **To play the recording back**, click the “Play” button.
55. **To add the audio after recording**, click the “OK” button to open the “Sound Attachment Properties” dialog box.
56. On the “Appearance” tab, set the “Icon,” “Color,” and “Opacity” of the icon used for the markup.
57. On the “General” tab, enter a “Subject” and “Description” for the sound file.
58. Then click the “OK” button to add the markup to the PDF page.
59. **To delete any annotation in a PDF page**, right-click the markup icon of the annotation to remove, and then click the “Delete” command in the pop-up menu that appears. Alternately, you can click the markup icon to select it and then press the “Delete” key on your keyboard to delete the annotation.

THE COMMENT PANE:

1. **To display the Comment pane**, select the “Comment” tool from the Tools Center or Tools Pane.
2. **To locate specific comments in the Comment pane**, click into the “Search Comments” text field at the top of the Comment pane.
3. Type text that you want to find within a comment. Comments containing the text will be displayed in the comment pane.
4. **To display all comments in the Comment pane after performing a search**, delete the text within the “Search Comments” text field.
5. **To sort comments in the Comment pane**, use the “Sort Comments” drop-down button within the pane.
6. **To designate which comments will be displayed in the Comment pane**, use the “Filter Comments” drop-down found to the right of the “Sort Comments” drop-down.
7. **To access additional commenting features and Acrobat’s commenting preferences**, use the “Options” button found to the right of the “Filter Comments” drop-down.
8. **To print a summary of all comments**, use the “Options” button in the Comment pane.
9. **To export comments to another application**, use the “Options” button in the Comment pane.
10. **To select a comment within a PDF page**, click the comment within the Comments List panel. The comment will appear with a blue border in the PDF page.
11. **To mark a selected comment as checked**, click the checkbox in the comment’s lower-left corner (after selecting the comment).
12. **To set the status of a comment**, first select the comment.
13. Next, right-click the selected comment and then roll over the “Set Status” command in the pop-up menu that appears.
14. Then click a status in the side menu of choices shown.
15. **To reply to comments within the Comments List panel**, click to select the comment in the Comments List panel.
16. Click into the “Type your reply...” text field and type your reply.
17. Click the “Post” button.

ACTIONS- COLLABORATING

ADVANCED COMMENTS LIST OPTION COMMANDS:

1. **To display the Comment pane**, choose “Comment” from the Tools Center or Tools Pane.
2. **To display a drop-down of advanced comment commands**, click the “Options” button in the small toolbar at the top of the Comments List panel in the Comment pane.
3. **To expand and collapse the comments in the Comments List panel**, choose either the “Expand All” or “Collapse All” command from the “Options” drop-down menu.
4. **To print a PDF with a content summary page that lists the contents of the comments in the PDF**, select the “Print with Comment Summary” command in the “Options” drop-down menu.
5. Set print settings using the “Print” dialog box.
6. Then click the “Print” button.
7. **To create a customized comment summary**, select the “Create Comment Summary” command from the “Options” drop-down menu.
8. Select a layout for the comment summary by selecting an option button in the “Choose a Layout” section of the “Create Comment Summary” dialog box.
9. Select a paper size from the “Paper Size” drop-down.
10. If desired, sort the comments by making a choice from the “Sort comments by” drop-down.
11. Select a font size to use by selecting the desired option button in the “Font Size” section.
12. Select the desired option button to choose which comments to include using the “Include” section.,.
13. If desired, specify a page range by entering a page range into the “Pages” section.
14. When you have made your selections, click the “Create Comment Summary” button to create and display the comment summary as a new PDF.
15. **To import comments from another PDF into the current PDF**, select the “Import Data File...” command from the “Options” drop-down menu to open the “Import Comments” dialog box. Use this dialog box to select the PDF file or FDF file (which is a comments export file type) that contains the comments you want to import and then click the “Open” button. Acrobat automatically imports and embeds comments from the selected file into the Comments List panel. If the comments did not originate in the same document, you may see a message box asking if you want to import the comments. You can click the “Yes” button to import the comments anyway.
16. **To export selected comments to an FDF file**, select the desired comments to export in the Comments List panel and then choose the “Export Selected to Data File...” command from the “Options” drop-down at the top of the Comments List panel.
17. Then use the “Export Comments” dialog box to select where to save the file.
18. Type a name for the file into the “File name” field and then click the “Save” button.
19. **To export all comments into an FDF file**, choose the “Export All to Data File...” command from the “Options” drop-down menu.
20. Use the “Export Comments” dialog box to select where to save the file and type a name for the file into the “File name” field.
21. Click the “Save” button to save the file as an FDF file.
22. **To export the comments in a PDF to Microsoft Word or to AutoCAD**, you must have Microsoft Word or AutoCAD installed on your computer. You can then select either the “Export to Word...” command or the “Export to AutoCAD...” command from the drop-down menu to open a wizard that will guide you through the process of exporting the comments to the selected application.
23. **To review the process of importing and exporting comments between Word and Acrobat**, review the lesson titled “Importing Acrobat Comments in Word” to view the same wizard that you also use to export comments to Word.

ACTIONS- COLLABORATING

ENABLING EXTENDED COMMENTING IN ACROBAT READER:

1. **To extend the commenting features of a PDF before sending it for review**, choose “File| Save As Other| Reader Extended PDF| Enable Commenting & Measuring” from the Menu Bar.
2. A dialog box will launch and display information about saving the PDF. Read the information and then click the “OK” button.
3. The “Save As” dialog box launches. Name the new file and designate a save location.
4. Then click the “Save” button.

USING DRAWING TOOLS:

1. **To access Acrobat’s drawing markup tools**, click the “Comment” tool in the Tools Center or Tools Pane.
 2. **To show button labels in the Comment toolbar**, right-click the “empty” part of the toolbar and select the “Show All Labels” option from the menu that appears. When button labels are displayed, drawing markup buttons appear within the “Options” button found on the right side of the Comment toolbar.
 3. **To move the drawing tools into the main toolbar choices when button labels are displayed**, select the “Expand Drawing Tools” option in the “Drawing Tools” menu choices of the “Options” drop-down.
 4. **To return drawing tools to their original, separate menu**, click the “Collapse Drawing Tools” button that appears.
 5. **To return drawing markup buttons to the Comment toolbar**, right-click the toolbar and then uncheck the “Show All Labels” option.
 6. **To add a text callout**, select “Text Callout” from the Drawing Tools. The pointer turns into a crosshair tool.
 7. Click the PDF page at the spot that the arrow will point to and then either drag to position the text box or click once again at another location to position the text box.
 8. Once the text box has been placed, type the text to add to the drawing markup.
 9. **To resize a text callout box**, click and drag on the resizing handles.
 10. **To move a text callout box**, click and drag the border of the box.
 11. **To reposition a selected text callout box within a PDF page**, click and drag the resizing handle at the end of the arrow.
 12. **To delete any drawing markup**, click its border to select it and then press the “Delete” key on your keyboard. Alternately, right-click the markup and then choose the “Delete” command in the pop-up menu that appears.
 13. **To draw and erase freeform images within a PDF**, use the “Draw freeform” and “Erase Drawing” tools found in the Comment toolbar.
 14. **To flip an arrow drawn using the “Draw arrow” drawing markup tool**, right-click the arrow and select the “Flip Line” command in the pop-up menu.
 15. **To open the “Properties” dialog box for a drawing markup**, right-click the markup in the PDF and choose the “Properties...” command in the pop-up menu that appears.
 16. **To change the appearance of a markup**, click the “Appearance” tab within the markup’s “Properties” dialog box.
 17. Use the “Style,” “Color,” “Opacity,” “Thickness,” and “Fill Color” options to adjust the markup’s appearance.
 18. Then click the “OK” button.
- (cont’d.)

ACTIONS- COLLABORATING

USING DRAWING TOOLS- (CONT'D.):

19. **To add a text pop-up note to any drawing markup**, right-click the drawing markup to which you want to add text and then select the “Open Pop-Up Note” command in the menu that appears.
20. A small pop-up text window is displayed. Type the text you want to associate with the drawing markup into the pop-up note.
21. Then click into the PDF (outside of the pop-up note) to set the pop-up note.

STAMPING AND CREATING CUSTOM STAMPS:

1. **To add a preset stamp to the current PDF page**, select “Comment” from the Tools Center or Tools Pane.
2. Click the “Add stamp” drop-down button found in the Comment toolbar. The drop-down menu that appears contains three categories of stamps: Dynamic stamps, stamps for signing documents, and standard business stamps. When you roll your mouse over one of these three categories, the available stamps are displayed.
3. Click to select a stamp from one of the “Add stamp” drop-down categories. The mouse pointer changes to display a semi-transparent image of the stamp.
4. Choose an appropriate spot on the PDF, and click to place the stamp. Note that the “Identity Setup” dialog box will appear and prompt you to enter identity information, if you haven’t entered that information already, after selecting a stamp from the “Dynamic” stamp category.
5. **To add a stamp to the “Favorite” stamps list shown at the top of the drop-down menu that appears when you click the “Add stamp” tool**, select the stamp to use from the drop-down menu.
6. Then immediately select the “Add stamp” tool button again, and select the “Add Current Stamp To Favorites” command in the drop-down menu.
7. **To create a custom stamp from an existing image file**, click the “Add stamp” tool, roll over the “Custom Stamps” command, and then choose the “Create...” command within the side menu.
8. Click the “Browse...” button to find and select the image file to use for the custom stamp.
9. Then click the “Open” button to return to the “Select Image for Custom Stamp” dialog box.
10. Click the “OK” button in this dialog box to open the “Create Custom Stamp” dialog box.
11. **To add the custom stamp to one of Acrobat’s existing stamp categories**, select one from the “Category” drop-down. Alternatively, you can create a new category for your stamp by typing a new category name into this drop-down field.
12. Type a name for the stamp into the “Name” field.
13. Ensure that there is a checkmark in the “Down sample stamp to reduce file size” checkbox.
14. When finished, click the “OK” button to create the custom stamp.
15. **To create a temporary, one-time use stamp from the contents of an image file you have copied to your Clipboard**, copy the image you want to apply as a stamp to your computer’s Clipboard.
16. Then click the “Add stamp” tool.
17. Select the “Paste Clipboard Image as Stamp Tool” command.
18. Then click into the document at the location at which you want to stamp the copied image file.

ACTIONS- COLLABORATING

IMPORTING CHANGES IN A REVIEW:

1. **To open an emailed PDF containing reviewers' markups**, double-click the attachment within the received email. Acrobat display the "Merge Comments?" message box, which asks if you want to open the tracked PDF and merge any comments and markups from the attachment PDF into the original.
2. **To merge the comments and markups into the original PDF**, click the "Yes" button in the "Merge Comments?" message box.
3. **To open the PDF copy and review comments and markup without merging**, click the "No, open this copy only" button in the "Merge Comments?" message box.
4. Then review the comments and markups received from the reviewer in Adobe Acrobat.
5. When you are satisfied with the comments and markups after reviewing them, click the "Merge Comments" button in the yellow message bar at the top of the PDF window to merge the comments into the original, tracked PDF file. Acrobat will then open the original PDF and merge the comments from the copy into it.
6. Click "OK" to dismiss the message box that appears after the merge operation is complete.
7. You can then save and close the original PDF file in Acrobat.
8. **To check for newly published comments within a shared document (using the shared document review feature)**, click the "Check for New Comments" button in the yellow taskbar at the top of the shared document's PDF window.
9. Acrobat will display a summary pop-up of any comments that were added or removed to the document and the comments will automatically appear within the PDF.
10. **To save an archival copy of a file after a review has ended**, click the "Save an Archive Copy" button that appears in the yellow taskbar at the top of the PDF file. Note: this operation should only be performed after the review has ended.
11. Use the "Save and Work Offline" dialog box to select the location to which you want to save the file. The file name will default to the original file name with "_archive" added to the end of it.
12. Then click the "Save" button in the dialog box.
13. **To save an archive copy at any time during the review process**, click the "Server Status" button in the yellow taskbar at the top of the PDF window and then select the "Save as Archive Copy..." command from the drop-down menu that appears.

USING TRACKER TO MANAGE PDF REVIEWS:

1. **To manage all of the documents currently out for review**, use Acrobat's Tracker feature.
 2. **To view the Tracker window**, open Acrobat and select "Send for Comments" from the Tools Center.
 3. Click the "Track Comments" button found in the "Send Comments" toolbar.
 4. **Alternatively**, select "View| Tracker..." from the Menu Bar to open it.
 5. The "Tracker" dialog box is displayed.
 6. The Tracker window displays content in the right pane for the item selected in the left pane.
 7. By default, the "Latest Updates" item is selected when the window opens, and shows the latest updates on your reviewed file in the area to the right.
 8. **To expand and collapse the Tracker sections shown**, click the small downward-pointing arrows next to the items in the left pane.
 9. **To view the updates for a specific review you have sent**, select the name of the file shown in that section to display its status in the area at the right side of the Tracker window.
- (cont'd.)

ACTIONS- COLLABORATING

USING TRACKER TO MANAGE PDF REVIEWS- (CONT'D.):

10. Then click the "View Comments" or "File Location" hyperlinks at the top of the right side of the window to open the PDF and display it within Acrobat.
11. **To change the deadline for a shared document review**, click the "Change Deadline" hyperlink.
12. In the "Change Deadline" dialog box you will see the names of the current reviewers shown in the "To" field. You can edit or add addresses shown in the "To" and "Cc" fields, if needed.
13. Then click the "Review Deadline" hyperlink in the lower-left corner of the dialog box to open the "Change Review Deadline" dialog box.
14. Then select the "New review deadline" option button and use the adjacent drop-downs to set the new review deadline date and time. Alternatively, you can select the "No deadline" option button to remove any deadline from the review.
15. Then click the "OK" button to change the deadline.
16. **To email reviewers regarding a deadline change**, click the "Send" button in the "Change Review Deadline" dialog box.
17. Then use the "Send Email" dialog box to send the emails and click "OK" in the Change Deadline" message box that appears.
18. **To end a shared document review**, click the "End Review" hyperlink in the Tracker window for the selected PDF file.
19. Then click "Yes" in the Adobe Acrobat message box that appears to end the review after reading the message. Note that you can restart a review by extending the deadline, if needed.
20. **To email all reviewers of a PDF during a review**, click the "Email All Reviewers" hyperlink in the "Reviewers" section at the right side of the Tracker window.
21. **To start a new shared document review using the same reviewers of the currently selected PDF review**, click the "Start New Review with Same Reviewers" hyperlink.
22. Then complete the "Send for Shared Review" dialog box as you normally would, but note that this time the reviewers' email addresses will already appear when you send the invitations for the PDF review.
23. **To individually email a reviewer**, click the person's email link shown in the right pane of the Tracker window.
24. **To remove a completed PDF review from the Tracker window**, click the PDF review to remove within the left pane of the Tracker window.
25. Then click the "Remove selected files or folders from Tracker" button at the bottom of the left pane.
26. Then click the "Yes" button in the confirmation message box that appears.
27. **To view the connectivity and update status of the servers to which you have saved shared review documents**, select a shared document server shown in the "Server Status" section of the left pane of the Tracker window.
28. If a server name appears here with a yellow exclamation mark icon, that means that there were connectivity or updating issues with the server that you should investigate.
29. **To close the Tracker when you are finished**, click the "X" in the upper-right corner of the window.

EXERCISES- COLLABORATING

Purpose:

1. To be able to create and manage commenting annotations within a PDF.

Exercises:

1. For these exercises, launch Acrobat and open a multi-page PDF containing both text and images.
2. Select "Comment" from the "Review & Approve" section of the Tools Center to access Acrobat's commenting tools.
3. Right-click the "empty" area of the Comment toolbar and ensure that the "Show All Labels" option is checked.
4. Click the "Add sticky note" tool in the Comment toolbar to access the sticky note tool.
5. Click a spot on page 1 of the open PDF to place a sticky note onto the document.
6. Type the words "This is my first sticky note" into the sticky note text field, and then click the "Post" button.
7. Click the X-shaped "Close" button on the sticky note to close the dialog box.
8. After closing the dialog box, hover your mouse cursor over the sticky note icon on the PDF page to see a pop-up message containing the comment you just typed.
9. Double-click on the sticky note icon to reopen its dialog box onscreen.
10. Click into the dialog box text field, and change the message so that it says, "This is my first sticky note edit."
11. Then click the "Post" button to save the edit.
12. Close the sticky note dialog box.
13. Click and drag to move the sticky note to a new spot on the PDF page.
14. Locate your comment in the Comment pane, under the words "Page 1."
15. Click on the comment within the Comment pane to expand the comment and display the "Type your reply..." text field.
16. Check the box to the left of the date and time information to indicate that you have read the comment.
17. Click into the "Type your reply..." text field and type the words "Very nice edit!"
18. Click the "Post" button to add your reply to the comment.
19. Click the "Highlight text" button found in the Comment toolbar.
20. Click and drag to highlight a few words of text on the PDF.
21. Click the "Highlighted Text" comment in the Comment pane, and then check the box to indicate that you have reviewed the comment.
22. Click the "Underline text" button in the Comment pane, and then click and drag to underline a few words of text on the PDF.
23. Click the "Replace Text" button in the Comment pane to activate the text replacement markup tool.
24. Locate a word on the PDF that you want to replace with another word, and click and drag to select the text and open the "Replace text" dialog box.
25. Type the replacement word into the dialog box, and then click the "Post" button.
26. Close the "Replace text" dialog box.
27. Click the "Draw" tool, and then click and drag to add a drawing markup to the PDF. Notice the addition of the "Pencil" markup to the Comment pane.
28. Click the "Erase Drawing" tool, and then click and drag over the line you just made with the drawing tool. When the drawing markup is completely covered by the eraser marking, release the mouse button to remove the markup. Notice the "Pencil" markup is also removed from the Comment pane.

(cont'd.)

EXERCISES- COLLABORATING

Exercises- (cont'd.):

29. Click the "Add stamp" tool in the Comment toolbar to access Acrobat's stamping tools.
30. Roll over the "Standard Business" category in the "Add stamp" tool's drop-down menu and then click to select the "Information Only" stamp.
31. Click a spot on the PDF where you want to apply the stamp.
32. After applying the stamp to the page, click to select the stamp image.
33. Use the resizing handles on the stamp's bounding box to reduce the size of the stamp.
34. Click and drag the stamp, avoiding the resizing handles, to move the stamp to another location on the page.
35. Right-click the stamp and select "Set Status| Accepted" from the side menu that appears.
36. Notice the thumbs-up "Accepted" icon that appears in the Comment pane within the "Applied Stamp" comment. Hover over the icon with your mouse cursor to see a pop-up message about the markup.
37. Right-click the "Information Only" stamp on the page and select "Delete" from the side menu that appears to remove the stamp. Notice that the markup also disappears from the Comment pane.
38. Click into the "Search Comments..." text field at the top of the Comment pane and type the word "first" to locate any comment containing the word "first." Notice the search results appear in the pane as you type.
39. Click the X-shaped "Remove Search Terms" button at the right side of the "Search Comments..." field to return the Comment pane to its usual state.
40. Click the "Sort Comments" drop-down button at the top of the Comment pane and select "Checkmark Status" from the options that appear. Notice that the comments in the pane are arranged so that comments with a checkmark appear first and comments without a checkmark appear last.
41. Click the "Sort Comments" drop-down button again, and select "Date." Notice that the comments are listed in the order they were added.
42. Click the "Sort Comments" drop-down button again, and select "Page" to return it to its default sort order.
43. Click the "Filter Comments" drop-down button to the right of the "Sort Comments" button and then select "Type| Sticky Note" from the options that appear. Notice that only the sticky note comment is displayed in the Comment pane.
44. Select "Show All Comments" from the "Filter Comments" drop-down menu to return all comments to the Comment pane.
45. Close the PDF without saving it.