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ADVANCED ACROBAT XI

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...it's all about you

ADVANCED ADOBE ADOBE XI

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INTRODUCTION AND OVERVIEW

Welcome to TeachUcomp, Inc.'s Mastering Acrobat Made Easy™ v.XI 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 XI.

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Sample- for evaluation purposes only!

CHAPTER 9-

COLLABORATING

9.1- METHODS OF COLLABORATING

9.2- SENDING FOR EMAIL REVIEW

9.3- SENDING FOR SHARED REVIEW

9.4- REVIEWING DOCUMENTS

9.5- ADDING COMMENTS AND ANNOTATION

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COLLABORATING

9.1- Methods of Collaborating:

In addition to being a powerful tool for creating PDF documents, Acrobat XI 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.

9.2- 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. To start an email review, open the PDF to share in Acrobat and then select the “Send for Email Review” tool in the Review panel of the Comment pane within the Task Pane.

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.

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 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.

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

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.

9.3- 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 Shared Review” tool in the Review panel within the Comment pane in the Task Pane to launch the “Send for Shared Review” wizard. 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. 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.

9.4- 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 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 Acrobat 8 or Adobe Reader 8 or later to conduct a review. 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.

9.5- 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.

Commenting tools are found in the Annotations panel in the Comment pane within the Task Pane. 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. Commenting tools include the Sticky Note tool, as well as tools for highlighting, replacing, striking through, and inserting text. You can even attach files to a PDF using the commenting tools, or add an audio recording as a comment.

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, choose the “Add sticky note” tool in the Annotations panel in the Comment pane within the Task Pane. 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 and email address, 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. If the Comment List panel is shown in the Comment pane of the Task Pane, then 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-

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

click the markup icon to display the sticky note comment box again, if needed.

You can click the “Highlight text” tool in the Annotations panel in the Comment pane within the Task Pane and then click and drag over text within a PDF page to highlight it.

You can click the “Add Text Comment” tool in the Annotations panel in the Comment pane within the Task Pane to add a comment as a text box within a PDF page and enable the display of the “Add Text Comment” toolbar in the PDF page. After selecting this tool, click into the place in the page at which you want to place a comment in a text box. The insertion point will appear at the location at which you clicked. You can then use the formatting buttons shown in the “Add Text Comment” toolbar to set the appearance of the text before you type the comment. Then type the comments that you want to display in a text box. You can also click and drag over the text you just typed and use the “Add Text Comment” toolbar to format its appearance after typing the comment, if desired. When finished typing the comment, click the “Selection tool” button in the Common Tools toolbar to turn the “Add Text Comment” tool off. Then click into the PDF page to ensure that you are not editing the text in the comment. 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 click the small “X” in the upper-right corner of the “Add Text Comment” toolbar to close it, if needed.

You can click the “Attach File” tool in the Annotations panel in the Comment pane within the Task Pane to add a file as an attachment to the PDF. After selecting this tool, click at the place within the PDF page at which you want the markup for the attachment to appear to launch the “Add Attachment” dialog box. 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 click the “Record Audio” tool in the Annotations panel in the Comment pane within the Task Pane to add an audio recording to the PDF. 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” 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 click the “Add stamp” tool in the Annotations panel in the Comment pane within the Task Pane to add a stamp to the PDF page. After clicking this tool, click the stamp to apply from the choices shown in the drop-down menu. You will then see the stamp appear when you place your mouse pointer over the PDF page. You then click when the stamp appears over 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.

The next few tools are used for editing text within a PDF. You can either click one of these tools and then select the text in the PDF or select the text in the PDF and then click the desired text tool to make the

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

text change. The tools are “Insert text at cursor,” “Add note to replace text,” Strikethrough,” “Underline,” and “Add note to text.” For each tool, other than “Strikethrough” and “Underline,” you will need to enter text in the pop-up text box that appears after using each tool to denote the text editing change to make. Also note that when using the “Insert text at cursor” tool, you only need to click at the point in the text at which you want the replacement text to be inserted versus actually selecting text. Each tool produces a unique markup on the PDF page. The “Insert text at cursor” tool inserts a blue, upward-pointing triangular “insert” icon. The “Add note to replace text” tool places a blue strikethrough through the text to remove as well as an “insert” icon. The “Strikethrough” places a red line through the text to remove. The “Underline” tool places a green underline under text. The “Add note to text” tool, which is a combination of the “Sticky note tool” and the “Highlight text” tool, highlights selected text and adds a sticky note bubble next to the highlighted text.

The “Text Correction Markup” tool is very useful for quickly making text editing markups within a PDF page. To use this tool, click it to select within the Annotations panel in the Comment pane within the Task Pane. Then simply select, replace, insert and delete the text within the PDF to have Acrobat automatically create the associated markups within the PDF page as you make the corrections using your keyboard. When used this way, this tool is like a combination of the “Insert,” “Replace,” and “Strikethrough” tools, and can save you quite a bit of time in having to pause to decide which text tool annotation button you need to click before making a correction to text within a PDF page.

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.

9.6- The Comments List:

After adding an annotation, you can open the Comments List panel within the Comment pane in the Task Pane to see the PDF annotations. When the Comments List is opened, sticky note comments, which will normally display on the PDF pages when the Comments List is closed, will instead disappear from the PDF pages and show themselves as comments within the Comments List panel.

As more comments and annotations are added to a PDF, the Comments List panel can become more helpful in organizing comments and annotations. You can use the buttons in the small toolbar at the top of the Comments List panel to search and filter comments in the PDF. You can click into the “Find” field in this toolbar and then type text that you want to find within a comment to locate comments. Delete the text within the “Find” field to display all comments again when finished.

You can click a comment within the Comments List panel to select that comment within the PDF page. It will appear with a blue border showing a spiraling animation. After selecting a comment in the Comments List, you can click the checkbox in its upper-right corner to mark it as checked. This can help you keep track of reviewed comments. You may also right-click a selected comment and the 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. You can filter comments within the Comments List panel by many categories, including their checked or unchecked state and their status. To filter the Comments List panel, click the “Filter comments” button in the toolbar at the top of the panel, roll your mouse pointer over the category by which to filter the comments and then select a filtering criteria from the side menu that appears. Note that you must have at least one comment checked before you will see the “Checked” category appear in the drop-down menu. To show all comments again after filtering, click the “Filter comments” button again and then select the “Show All Comments” command in the drop-down menu.

9.6- The Comments List- (cont'd.):

You can sort the comments shown within the Comments List panel by clicking the “Sort comments” button and then rolling your mouse pointer over one of the categories shown in the drop-down menu. Then click the sorting criteria to apply.

You can also reply to comments within the Comments List panel. To reply to a comment, select the comment in the Comments List panel and then click the triangle next to the comment author’s name to display a drop-down menu or right-click the comment to display a pop-up menu instead. Either way, in the menu that appears, select the “Reply” command. A text field will appear within the comment in the Comments List panel, and you can type your reply to the comment. 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.

You can click the “Options” drop-down button in the toolbar at the top of the Comments List panel to display a drop-down menu of choices. 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.

9.7- 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 within the Task Pane to display a drop-down of advanced comment commands.

If you have comments to which reviewers have replied, you can expand and collapse the replies to the comments within the Comments List panel by choosing either the “Expand All” or “Collapse All” command from the drop-down menu.

You can undock the Comments List panel so that it appears as its own window in Acrobat. To do this, select the “Undock Comment List” command in the drop-down menu. To dock the Comments List panel into the Acrobat window again, select the “Dock Comment List” command that appears when the panel is undocked.

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 comments from the selected file

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

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 anyways.

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 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.

9.8- Enabling Extended Commenting in Acrobat Reader:

Adobe Reader XI includes all of the markup and commenting tools included with Acrobat XI. 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.

9.9- Adding Drawing Markups:

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 box” and “Add text callout” drawing markups, 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 show the drawing markup tools, click the Drawing Markups panel within the Comment pane in the Task Pane.

To add a text box drawing markup, click the “Add text box” tool in the Drawing Markups panel. You can then either click once to insert a text box or click and drag to define an area for the text box within the PDF page. Then type the text you want the text box to contain. Once your text is added to a text box, the box remains visible. You can then click the border of the text box to set the text display and select the text box. You can click into the PDF page to de-select the text box. To edit the text again, if needed, double-click directly on the text within the text box to place your insertion marker into the text so you can make your editing changes. Then click the border again to set the text and select the box, or click into the PDF text again to set the text and de-select the text box. You can resize and move the text box in the PDF using the same techniques shown for many other objects in Acrobat. Click and drag the border of the text box to move it, and click and drag the resizing handles on the border of the selected text box to resize it. 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 “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, click the “Add text callout” tool in the Drawing Markups panel. 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 add immediately type the text to add to the drawing markup. You can manipulate the text callout just as you did the text box. However, when the text callout is selected, note that you can use the resizing handle at the end of the arrow to reposition it within the page, if needed.

The other drawing markup tools allow you to add shapes to PDF documents. When you hold your mouse pointer over any of these tools you will see a small screen tip that shows the name of the tool and how to draw it. You can use the “Draw freeform” tool to draw freeform images within a PDF. The “Erase freeform” tool can be used to remove mistakes from freeform drawings. 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 will appear, just like the ones associated with the other text annotations. Type the text you want to associate with the drawing markup into the pop-up note and then click into the PDF to set the pop-up note.

9.10- Stamping and Creating Custom Stamps:

The “Add stamp” tool in the Annotations panel of the Comment pane in the Task Pane 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, click the “Add stamp” tool in the Annotations panel of the Comment pane in the Task Pane. Either select a “Favorite” stamp shown in the top section of the drop-down menu or roll your mouse pointer over the stamp categories shown in the second section of the drop-down menu and then click the stamp to use in the side menu that appears.

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.

The mouse pointer changes to reflect the selected stamp when you place it over the PDF page. Click anywhere in the PDF page to apply the digital stamp.

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 “Create Custom Stamp...” 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 in the Annotations panel 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.

9.11- 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 markup 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 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 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.

9.12- 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 XI and then click the "Track Reviews" tool in the Review panel of the Comment pane in the Task Pane. 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 plus or minus signs 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 click the "View Comments" or "File Location" hyperlinks to open the PDF and display it within Acrobat.

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

For shared document reviews, you can click the “Change Deadline” hyperlink 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.

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 Email Review” tool in the Review panel of the Comment pane within the Task Pane.
2. 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.
3. 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.
4. **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.
5. After selecting a PDF, click the “Next” button.
6. 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.
7. **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.
8. 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.
9. When you have entered all of the email addresses of reviewers, click the “Next” button.
10. 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.
11. When you have made your changes, click the “Send Invitation” button to finish.
12. 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.
13. 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.
14. 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 Shared Review” tool in the Review panel within the Comment pane in the Task Pane to launch the “Send for Shared Review” wizard.
2. 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.
3. When finished within a screen click the “Next” button at the bottom of the wizard to proceed to the next screen.
4. If needed, you can click the “Previous” button to return to a previous screen and change your answers.
5. 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.
6. 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.
7. 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.
8. **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.
9. Select the “Tracker” category at the left side of the dialog box.
10. Then select the sharing configuration to delete from the “Remove Custom Server Locations” drop-down in the area to the right.
11. 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.
12. 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 8 or Adobe Reader 8 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 add comments and annotations**, display the commenting tools by clicking the Annotations panel in the Comment pane within the Task Pane.
2. To add a sticky note, choose the "Add sticky note" tool in the Annotations panel in the Comment pane within the Task Pane.
3. 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 and email address, along with the date and time that the note was created.
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. If the Comment List panel is shown in the Comment pane of the Task Pane, then the sticky note disappears but the markup icon remains to alert viewers that there is a comment on this page. They can see the comment appear when they hold their mouse pointer over the comment in the PDF page.
9. You can double-click the markup icon to display the sticky note comment box again, if needed.
10. **To highlight text**, click the "Highlight text" tool in the Annotations panel in the Comment pane within the Task Pane and then click and drag over text within a PDF page to highlight it.
11. **To add a text box comment**, click the "Add Text Comment" tool in the Annotations panel in the Comment pane within the Task Pane to add a comment as a text box within a PDF page and enable the display of the "Add Text Comment" toolbar in the PDF page.
12. After selecting this tool, click into the place in the page at which you want to place a text box comment. The insertion point will appear at the location at which you clicked.
13. You can then use the formatting buttons shown in the "Add Text Comment" toolbar to set the appearance of the text before you type the comment.
14. Type the comments that you want to display in a text box.
(cont'd.)