



# **learningcurve**

## **Adobe Acrobat** **Share & Review PDFs**



EDUCATION ELITE

Platinum Reseller

## Share and track PDFs online

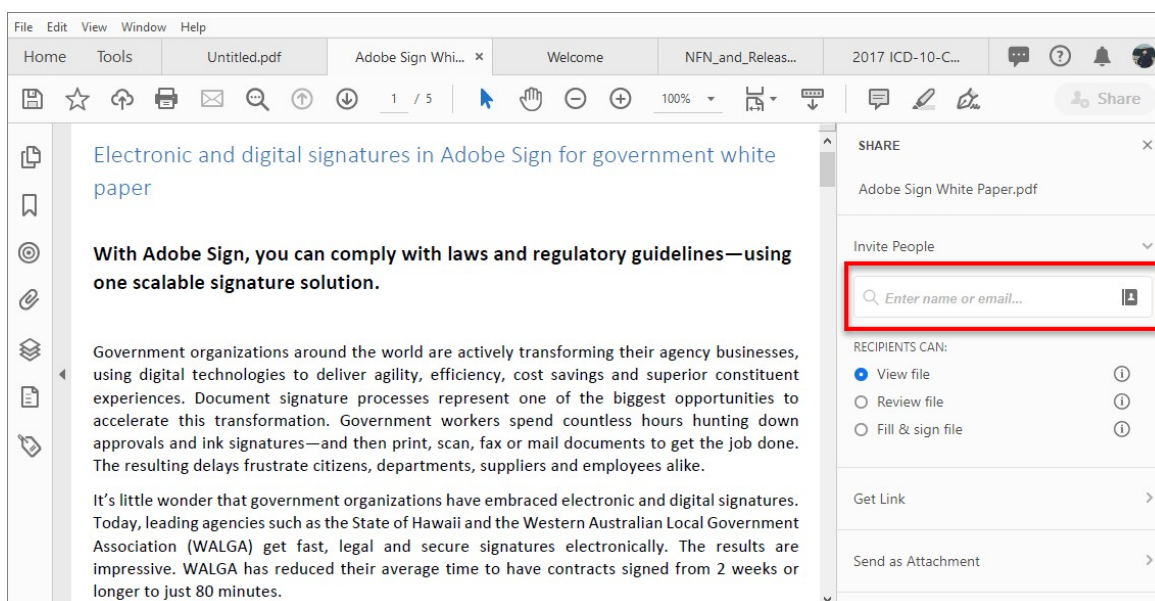
You can quickly share a link to a PDF document with others for viewing or commenting. The document shared as a link opens in any browser, on any device. The document is stored securely in Adobe Document Cloud. Recipients get an email with a link, and they can click the link to view and comment on the document in a browser; no sign-in required.

### Share PDFs

1. Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat DC. Alternatively, choose **Tools > Share**, and then browse and select the PDF. The share dialog box is displayed.

The sharing options are displayed in the right pane.

2. In the **Invite People** section, enter, or choose the email address of whoever you'd like to receive the file. You can also use the **Address Book** link to choose email addresses.



3. Share the file using any one of the following methods:

- **Send personalized invitations using Adobe Document Cloud share option**

The detailed tracking information is available for files shared using a personalized link to individuals.

- 1 Choose **View File**.
- 2 The Name and Message fields are just like the ones you use for sending an email and appear to your recipients in the same way. Enter desired information, and then click **Send**.

Your recipients get an email notifying them that the file is shared with them.

- **Share an anonymous or public link**

An anonymous or public link makes the files accessible to anyone who clicks the link. Also, the detailed tracking information is not available for files shared using public links.

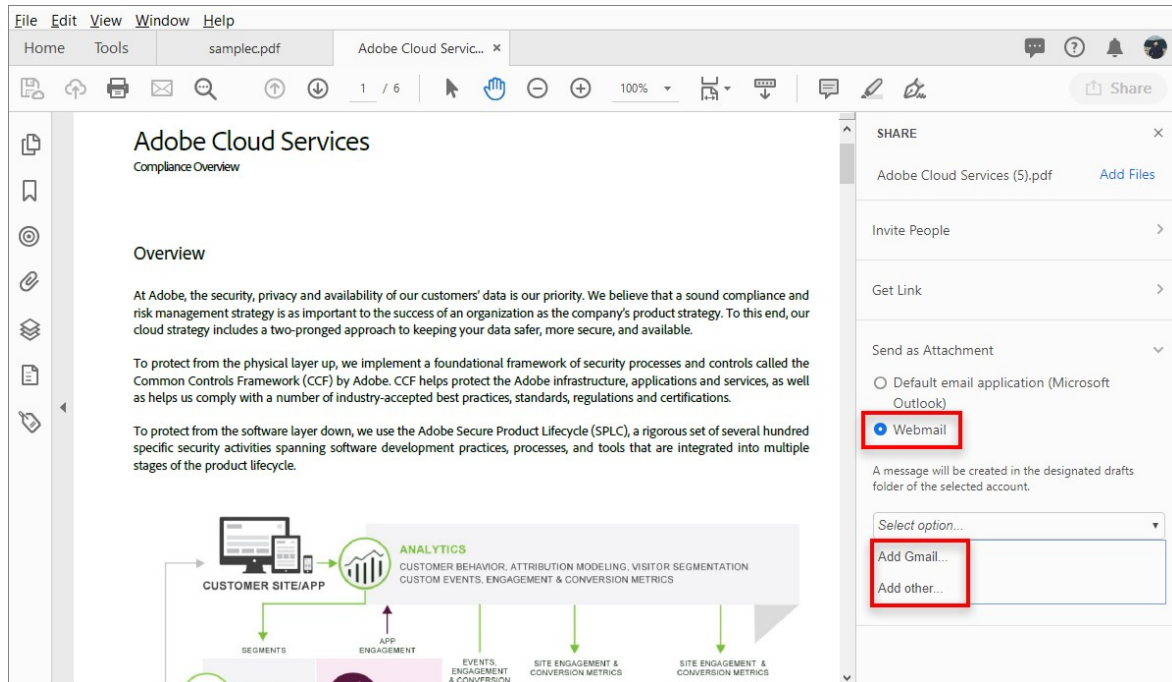
- 1 Click **Get Link**. The **View File** option is selected by default.
- 2 Click **Create Link**. The selected files are uploaded to the Adobe Document Cloud and a public link is created.
- 3 Click **Copy Link**, and close the Share pane.
- 4 Share the link with the recipients.

- **Share the document as an email attachment**

The detailed tracking information is not available for files shared as attachments.

- 1 Click **Send As Attachment**.
- 2 In the **Send As Attachment** section, do one of the following:
  - Choose **Default Email Application**, and click **Continue**.
  - Choose **Webmail**. In the **Select Option** drop-down list, choose one of the following:
- **Add Gmail**: Enter your email address, and click **Continue**. Enter the password, and grant permissions when prompted.

**Add other**: Enter your email address, password, and IMAP/SMTP mail server settings. Click **Add**.

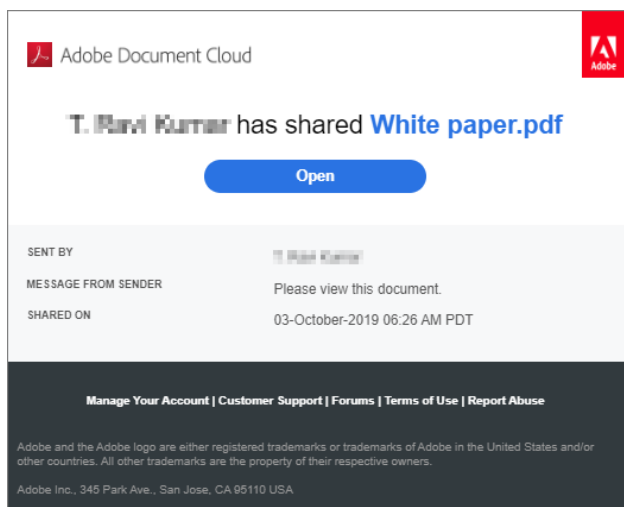


- 3 An email draft is displayed with the file attached. Enter the email addresses of the recipients, add an appropriate message in the subject and body of the email, and then send the email.

## Recipients experience

Recipients get an email notifying them that the file is shared with them. The email contains the Open button and a link to the shared document. Clicking the link or the button opens the document in a browser. Recipients can also download the document if necessary.

See the example screenshot below showing the email notification received by a recipient.



*The email notification with a link to the shared document*

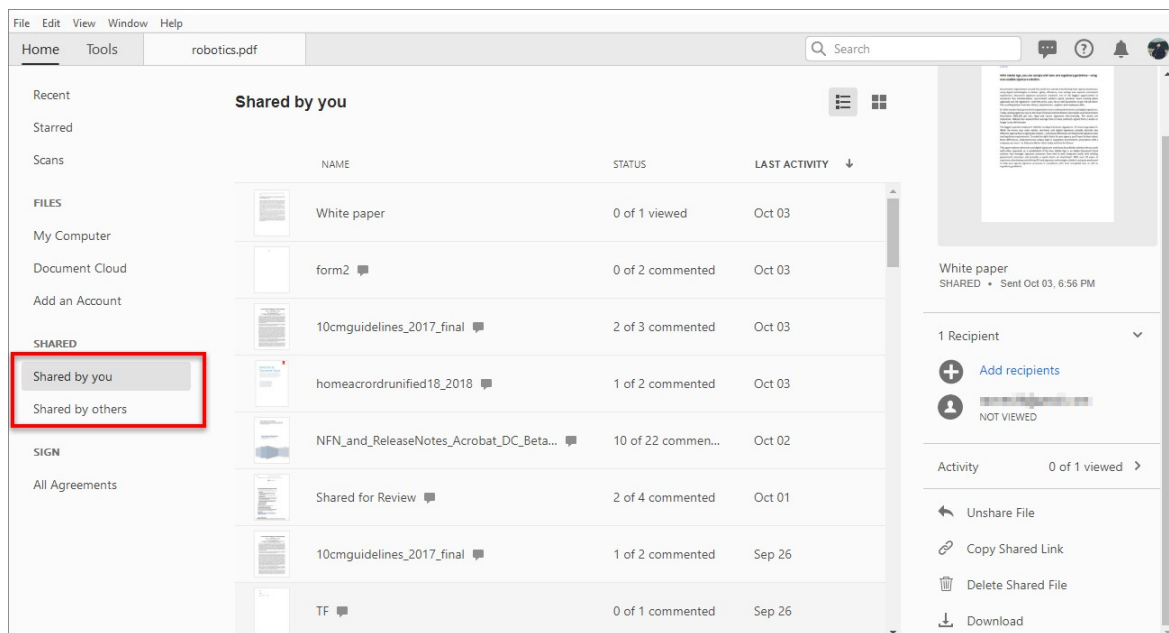
## Track shared files

The files that you have recently shared are listed in **Home > Recent**. When the recipient views the file, you get a notification in Acrobat and an email. To view and track all the files shared for viewing, do the following:

- 1 Click **Home**. In the **Shared** section, do one of the following:
  - To view the files shared by you for view or review, click **Shared By You**.
  - To view the files received for view or review, click **Shared By Others**.

All the files shared for viewing are displayed along with the following information:

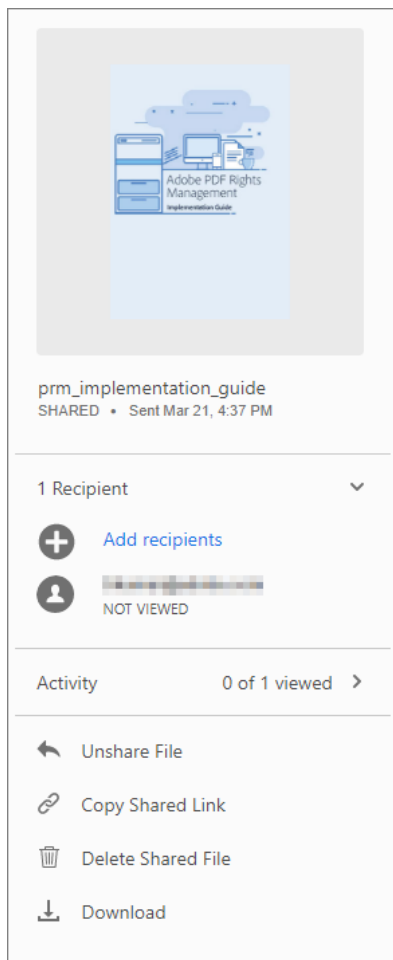
- **Name:** Name of the file shared for view.
- **Status:** Shows the number of people who have viewed the file.
- **Last Activity:** The timestamp of the file sent or received for viewing.



- 2 To view the details of a file, select the file. A thumbnail of the file is displayed in the right pane. The action board in the right pane displays the actions you can perform on the file. The displayed actions vary based on whether you have shared the file, or received the file for viewing as shown below:

### Actions on files shared

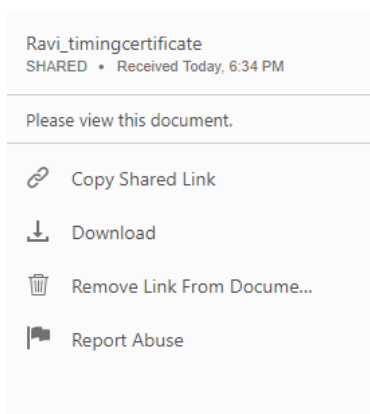
- View the activity and timestamp on the shared file. Expand **Activity** to view the details like Created By, Sent To, Viewed By and Downloaded By the recipients.
- **Unshare File** if you would like to prevent anyone else from viewing or downloading the file.
- **Copy Shared Link** and share with other recipients for viewing.
- **Delete Shared File** to remove the file permanently from the Adobe Document Cloud.
- **Download** the file to your device.



*Actions on files shared for viewing*

### Actions on files received

- View the timestamp of the file received.
- **Copy Shared Link** to either share it with other recipients or open the file on browser.
- **Download** the file to your device.
- **Remove Link From Document Cloud** to remove the file permanently.
- **Report Abuse** for any inappropriate content received.



*Actions for files received for viewing*



## Mark up text with edits

You can use text edit comments in a PDF to indicate where text should be edited in the source file. Text edit comments do not change the actual text in the PDF. Instead, they indicate which text should be deleted, inserted, or replaced in the source file from which the PDF was created.

Acrobat offers two basic methods to add text edit annotations: pre-select and post-select.

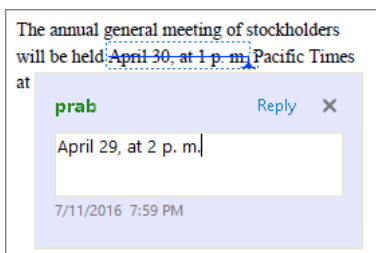
### Pre-select or Text Correction Markup tool

Use the Select tool, or the Text Correction Markup tool and then right-click (Windows) on the selected text to open a menu of text editing options. After marking the text, you can also click on a text edit tool.

### Post-select

Click the text edit tool and then select the text.

**In Acrobat** for Windows, you can export text edits directly to the **Microsoft Word** document that the PDF is based on to revise the source document. To use this feature, you must use PDFMaker in Word to create the PDF. Before you export your text edits, make sure that insertion comments use the exact text, including spaces and paragraph returns, that you want to add. If you add extra instructional words (such as "Add the following:"), these words will have to be deleted manually from the Word document.



*Replace Text option: Selected text is struck out and new text is added to a linked pop-up note.*

### Replace text

- 1 From the Tools Comment toolbar, select **Add Note to Replace Text**.
- 2 Select the text. Any selected text is crossed out and a pop-up note opens.
- 3 Do one of the following:
  - Type the text to be inserted or added. The insertion caret appears.
  - To indicate that a new paragraph should be added, press Enter, and then close the pop-up note without adding text. The paragraph insertion caret appears.

### Add a note to a text edit

- 1 Using the Select tool, right-click a text edit.
- 2 Select Open Pop-Up Note from the menu.
- 3 Type your note in the pop-up note.

### Insert text

- 1 From the Tools Comment toolbar, select the **Insert Text at Cursor** tool.
- 2 Click between the words or characters where you want to insert text.
- 3 Do any of the following:
  - Type the text you want to insert.
  - To indicate that a new paragraph should be added, press Enter, and then close the pop-up note without adding text. The paragraph insertion caret appears.
  - To indicate that a space should be added, press the spacebar, and then close the pop-up note without adding text. The space insertion caret appears.

You can also indicate text edits by using the Select tool to select text, right-click the selected text, and then choose a text edit annotation.

## Delete text

- 1 From Tools > Comment toolbar, choose the **Strikethrough** tool.
- 2 Select the text to mark for deletion.

If markup comments are stacked, delete the comments in the Comments list: Choose Comment > Comments List, select the comment, and press Delete.

## Highlight, strikethrough, or underline text

Choose Tools > Comment to view the menu bar.



Choose Tools > Comment to see the menu bar for Highlight Text tool, Strikethrough Text tool, and Underline Text tool

You can use the **Highlight Text** tool, **Strikethrough Text** tool, and the **Underline Text** tool to add comments by themselves or in conjunction with notes.

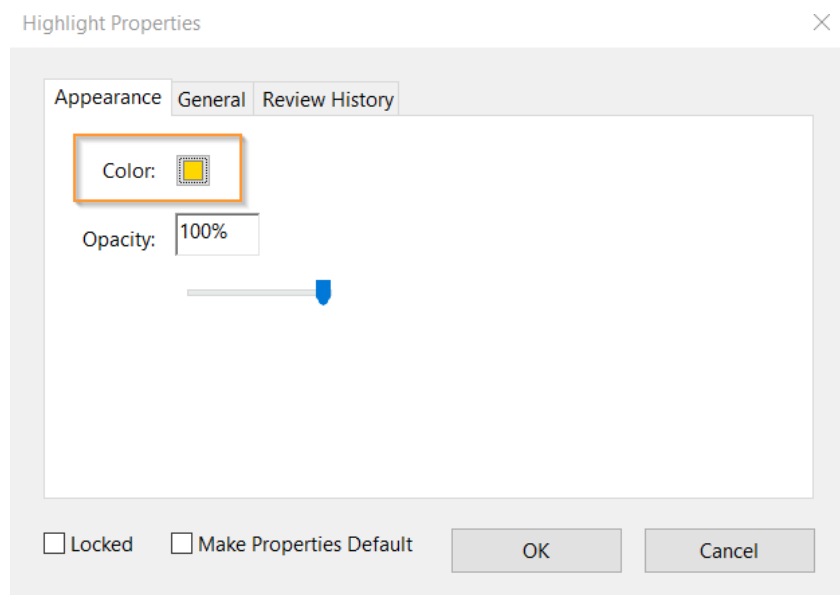
You can add a highlight with a note or you can cross out text or underline text by selecting the text using the Select tool, right-clicking, and then choosing that option from the menu that appears. However, if you're marking up a lot of text, the specialized tools are faster and easier to use.

- 1 Choose Tools > Comment, the **Highlight Text** tool, the **Strikethrough Text** tool, or the **Underline Text** tool.

If you want to apply more than one comment using the Strikeout Text tool or the Underline Text tool, choose Keep Tool Selected from the Options menu after you select the tool. The Highlight Text tool stays selected after you make the first comment.

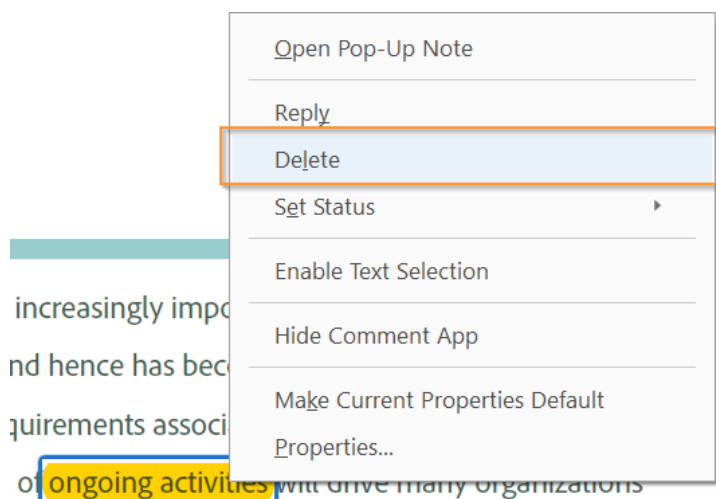
- 2 Drag from the beginning of the text you want to mark up. Control-drag to mark up a rectangular area of text. This feature is especially useful when you are marking up text in a column.
- 3 (Optional) To add a note, double-click the markup and add text in a pop-up note.

Note that you can also change the colour of the highlighted text. Right-click on the highlighted text and click Properties to open the Highlight Properties dialog box, which will allow you to change the colour.



*Change Highlight Colour option: The colour of the highlighted text can be changed using this option.*

In case if you need to delete the highlight on the text (without deleting the text), right-click (Windows) on the highlighted text and click Delete.



*Delete highlight colour without deleting the text.*

## Preparing for a PDF review

### About managed PDF reviews

In a managed review, you use a wizard to set up your review, specify the document location, and invite participants. You don't have to import comments, enable commenting for Reader users, or manually track reviewer responses.

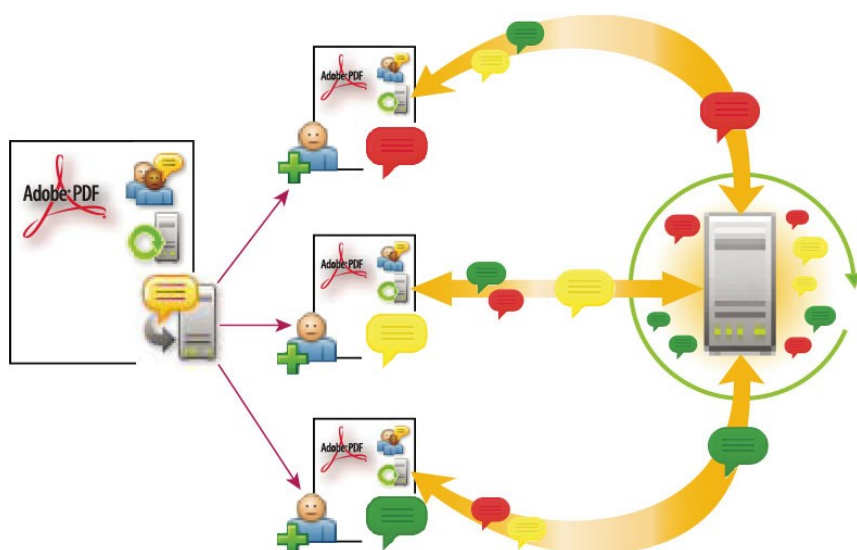
You must have **Acrobat Pro installed** to enable commenting for Acrobat Reader users in managed reviews. You cannot enable commenting for Acrobat Reader users using Acrobat Standard.

Acrobat includes two types of managed reviews: shared and email-based reviews. Each type of review has a wizard that helps you distribute a PDF with special tools and instructions to reviewers.

**The Tracker** tracks all managed reviews. **The Tracker** provides access to the PDF file and information about the review and its participants. Review initiators can change review deadlines, add reviewers, and end reviews from the Tracker. **The Tracker** lets participants know when new comments are available, when deadlines are changed, and when reviewers are added, even when Acrobat is closed. It also provides information about server error states.

Managed reviews cannot be conducted for PDF Portfolios.

### Shared reviews



*In a shared review, recipients can easily join the review, share their comments, track their reviews, and get regular updates.*

Shared reviews are the most collaborative form of review because participants can read and reply to the comments of other participants. Comments from participants are stored in a repository on an internal server.



Acrobat synchronizes comments at regular intervals to download all the latest changes. Reviewers are notified of new comments as they are added, and they can see and reply to comments made by other reviewers.

For shared reviews, reviewers must have Acrobat 8 or later or Reader 8 or later installed to view other reviewer comments. Reviewers using earlier versions of Acrobat must send comments in email.

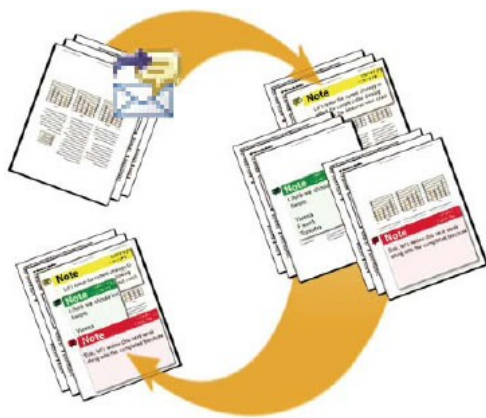
## Email-based reviews

Email-based reviews are ideal when reviewers either don't have access to a common server or don't require a collaborative approach to reviewing documents.

In an email-based review, the initiator sends a PDF to reviewers as an email attachment. Reviewers add their comments and return the document by using the **Send Comments** button in the document message bar. When receiving these comments, the initiator can merge them into their copy of the PDF.

The primary limitation to email-based reviews is that participants can't view other comments during the review. Initiators can view comments only after receiving them.

Participants in an email-based review must have Acrobat 6.0 or later or Reader 7.0 or later.



*In an email-based review, participants send their comments to the initiator, who merges the comments into the master copy of the PDF.*

## Choosing a distribution option for reviews and forms

Acrobat provides several distribution options in the **Send For Shared Review** and **Distribute Form** wizard. When you choose an option, consider the security needs for the distributed file, what servers or websites your recipients can use to download the file, and how you want to receive comments or form data.

### **Internal server**

You can use your own internal server location if your recipients work behind a firewall and all have access to a common server. The server can be a network folder, a **Microsoft SharePoint** workspace (Windows only), or a web server folder. You can include a link to your distributed PDF or send it as an attachment in an email message. For reviews, Acrobat uploads published comments to the server. For forms, Acrobat stores responses on your hard drive as they are returned.

Web server folders are not available for form distribution.

When you specify your own server, the wizard prompts you to save a profile with the server location and the distribution options you chose. The next time you distribute a PDF, the saved profile is available as an option in the wizard.

### **Email**

The **Distribute Forms** wizard has an option for sending a form as an email attachment. You can send the form using your own email client or webmail. You can also use the wizard to create an email message in which the form file is attached. Once your recipients fill out and submit the form, the responses are returned to your mailbox. Each response is copied into a **PDF Portfolio** responses file, which you can organize and export to a spreadsheet.

The **Send for Shared Review** wizard lets you either email a link to the pdf or attach the pdf to the email.

## Enable commenting for Reader users (Acrobat Pro)

By enabling commenting rights in a PDF, users of Reader 8 or later can participate in reviews of that PDF. When a PDF with commenting rights opens in Reader, it includes a document message bar and commenting tools that are otherwise unavailable.

When you initiate a managed review, commenting rights are automatically enabled. If you do not use a managed review (for example, if you send a PDF directly in email), you can still enable commenting rights.

- Open the PDF and choose **File > Save As Other > Reader Extended PDF > Enable Commenting and Measuring**.

If you enable commenting for Reader in a digitally signed document, the signature is invalidated.

## Select an email application for reviews

You need either an email application and a mail server connection, or a webmail account for email-based reviews and to send comments. Acrobat supports most email applications. If you have more than one email application installed, you can specify which application starts when Acrobat sends a PDF. Do one of the following:

- Double-click **Internet Options** in the **Control Panel**. In the **Internet Properties** dialog box, select the Programs tab, and then select the preferred email application. **Restart Acrobat** to activate the change.
- Change the MAPI settings in your email application. Acrobat and Reader use the **Messaging Application Program Interface** (MAPI) to communicate with your email application. Most email applications come with MAPI settings to handle this communication. For more information on configuring your email applications, see the email application's Help.

## Specify a server

If you distribute a PDF using your own server location, you can specify a network folder, a Windows server running **Microsoft SharePoint** Services, or a web server folder. Participants must have read and write access to the server you specify. Ask your network administrator to provide a suitable server location for storing comments. No additional software is required to set up a server.

Web server folders are not available for form distribution.

## **Network folders**

If all recipients are within a local area network, network folders and SharePoint servers are the best choices for a comment server. Network folders are generally the cheapest and most reliable.

## **SharePoint/Office 365 subsites**

If your recipients work behind a firewall and all have access to a common server, you can use your own internal server location, such as a Microsoft SharePoint site.

## **WebDAV servers**

WebDAV servers (web servers that use the WebDAV protocol) are best used only if your reviewers are outside a firewall or a local area network. For more information on how to configure Acrobat to use a WebDAV service.

## **Starting a PDF review**

Automatically collect everyone's comments in a single PDF file. Track progress and consolidate comments.

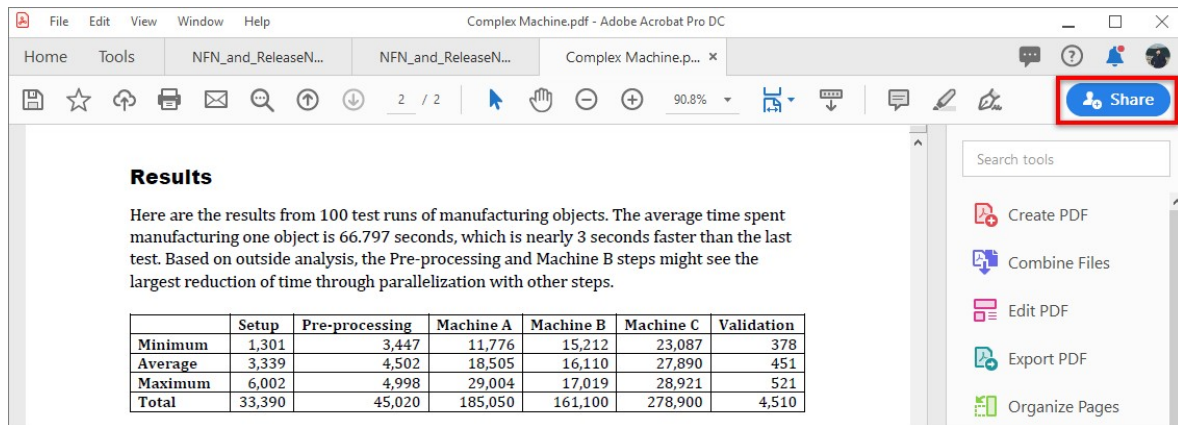
## **Share a PDF for review using the Adobe Document Cloud review service**

Use the Adobe Document Cloud review service to easily share PDF files for review from Acrobat DC desktop application, the Document Cloud web, or Acrobat Reader mobile app. When reviewers click the URL in the email invitation from their computer, they can easily provide their feedback in a browser without having to sign in or install any additional software.

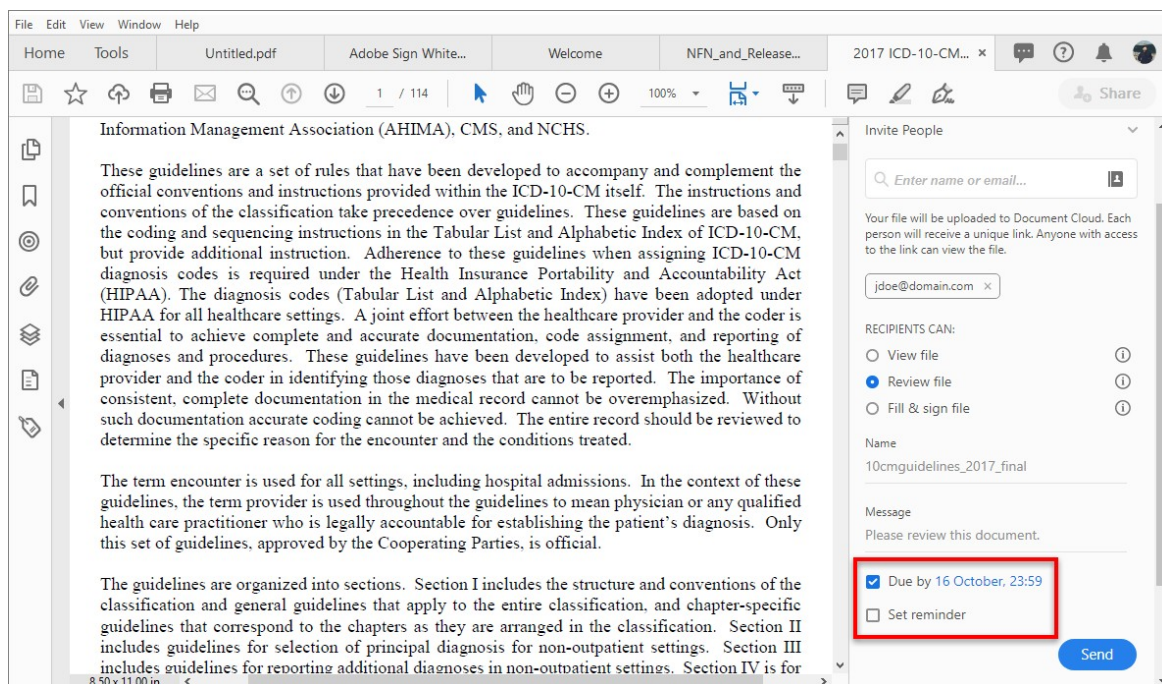
You can use the service to share PDF files for review in one of the following ways:

- **Send personalized invitations using the Document Cloud Share option**

- 1 Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat. Alternatively, choose **Tools > Share**, and then browse and select the PDF. The sharing options are displayed in the right pane.



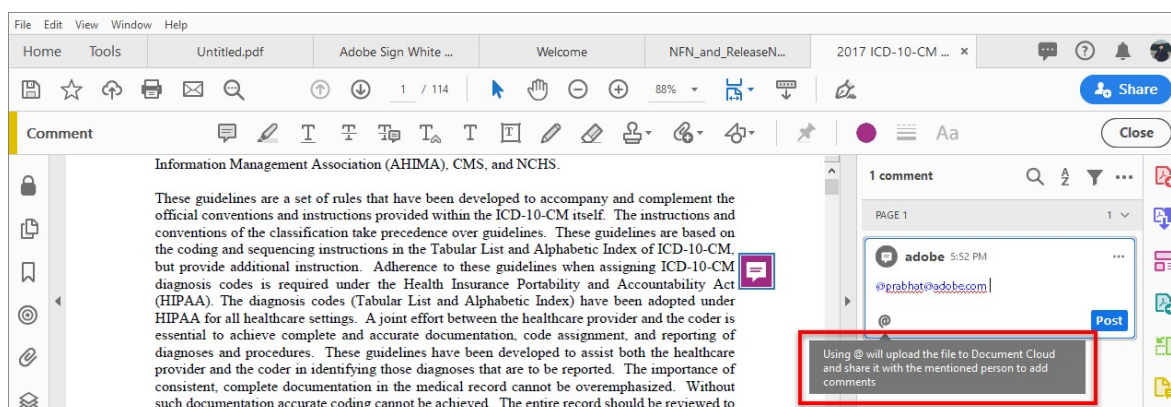
- The computer must be connected to the Internet to start a shared review in Acrobat.
  - You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose **Acrobat > Create And Send For Review**.
- 2 In the **Invite People** section, enter, or choose the email address of whoever you'd like to review the file. You can also use the **Address Book** link to choose email addresses. Choose **Review File**.
  - 3 The **Name** and **Message** fields are just like the ones you use for sending an email and appear to your recipients in the same way. Enter the desired information.
  - 4 If you want to set the review deadline, select **Set Deadline**. Specify the time, select the date, and click **Done**. To set the reminder for the invitees, select **Set Reminder**. Specify the time, select the date, and click **Done**.



- 5 Click **Send**.

## Initiate a review using @mention in a PDF

Use @mention in your personal commenting notes to start a review. The @mentions includes your organizational contacts and your synced personal contacts list. The moment you use @mention in a PDF file, the review mode gets enabled for you. The reviewers get an invitation email with a link to the Document Cloud shared review file.



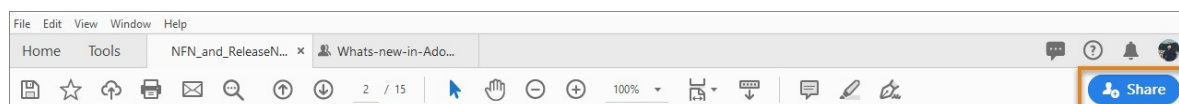
## Reviewer experience

The reviewers receive an email invitation with a link to the review PDF. When they click the link or the **Open** button in the invitation, the PDF opens in a web browser. They can use the commenting tools to add comments to the PDF. They can also use Acrobat Reader DC or Acrobat DC desktop applications to add comments.

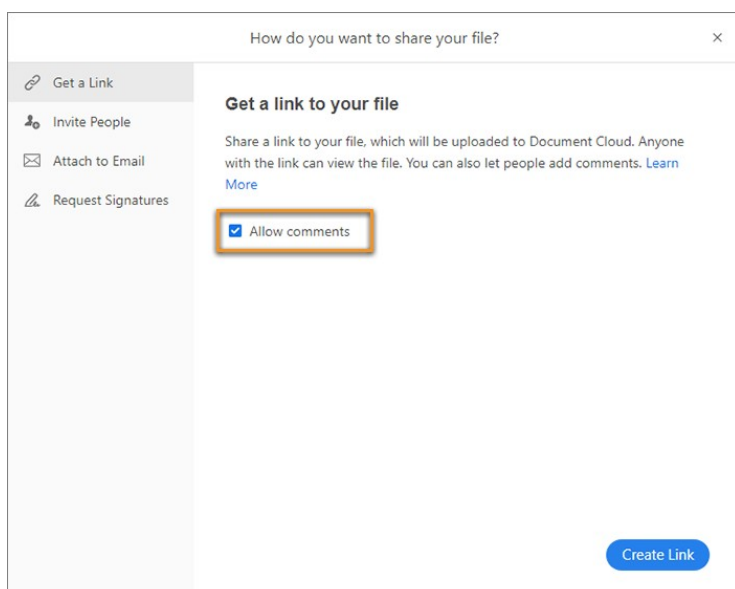
Send an anonymous or public link in an email

An anonymous or public link makes the files accessible to anyone who clicks the link. Follow the steps below to create a review link, and share it using your email client.

- 1 Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat. Alternatively, choose **Tools > Share**, and then browse and select the PDF. The sharing options are displayed in the right pane.



- The computer must be connected to the Internet to start a shared review in Acrobat.
  - You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose **Acrobat > Create And Send For Review**.
- 2 Click **Get a Link**.



- 3 In the **Get Link** section, choose **Review File**, and click **Create Link**. The selected file is uploaded to the Document Cloud, and a public link is created.



You cannot set a deadline or reminder when you create a public link and share the file for review.

- 4 To copy the review link, click **Copy Link**. Share the review link with the reviewers in an email.

## Reviewer experience

The reviewers receive an email invitation with a link to the review PDF. When they click the link or the **Review** button in the invitation, the PDF opens in a web browser. They can use the commenting tools to add comments to the PDF. They can also use Acrobat Reader DC or Acrobat DC desktop applications to add comments.

## Share a PDF for review by hosting it on SharePoint, WebDAV server, or a network folder

### • Steps to send a PDF for review

- 1 If you're using Acrobat 2017 or Acrobat DC 2015 (Classic), skip to the next step. If you're using Acrobat DC, do the following before you initiate the review:
  - a Go to **Edit > Preferences**. The Preferences dialog box is displayed.
  - b In the left pane, click **Reviewing**. Under the **Shared Review Options** section, deselect the **Share For Review Using Adobe Document Cloud** check box, and then click **OK**.
- 2 Choose **Tools > Send For Review**. The Send for Comments toolset is displayed in the secondary toolbar.

You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose Adobe PDF > Convert To Adobe PDF And Send For Shared Commenting. For Office 2010 applications, choose Acrobat > Create And Send For Shared Commenting.

- 3 In the secondary toolbar, click **Send For Shared Commenting**.

Select the way you want to collect comments from your reviewer and click **Next**.

- 4 Select how you would like to host the shared review file and specify the location.
  - **Network folders:** If all recipients are within a local area network, network folders and SharePoint servers are the best choices for a comment server. Network folders are generally the cheapest and most reliable.
  - **SharePoint/Office 365 subsites:** If your recipients work behind a firewall and all have access to a common server, you can use your own internal server location, such as a Microsoft SharePoint site.
  - **WebDAV servers:** WebDAV servers (web servers that use the WebDAV protocol) are best used only if your reviewers are outside a firewall or a local area network. For more information on how to configure Acrobat to use a WebDAV service.
- 5 Choose a delivery and collection method. Click **Next**.
- 6 Enter a new profile name and click **Next**, or click **Next** to use the default.
- 7 On the email screen, specify the following settings as needed:

**Delivery Method** Click to specify a different delivery and collection method from the one that is currently selected.

**To, Cc** Enter the email addresses of your reviewers. Insert a semicolon or a return after each address. Click the

**To** or **Cc** button to select email addresses from your email application address book.

**Subject, Message** Preview and edit the email subject and message as needed. Acrobat saves any changes you make and displays them the next time you send a document for review. To use the default email message, click **Reset Default Message**.

**Review Deadline** Click to specify a different date or no deadline. After the review deadline expires, reviewers cannot publish comments.

If the review deadline expires while a reviewer has the document open in Acrobat, then the reviewer can publish comments before closing the document.

#### 8 Click **Send**.

The shared PDF that you send includes the **Annotation** and **Drawing Markups** panels, and instructions in the document message bar.

Acrobat creates a copy of the shared review file, named *[original filename]review.pdf*, in the same folder as the original file you specified for the review.

### Start an email-based review

When you start an email-based review, you send out a tracked copy of the PDF, enabling you to easily merge comments that you receive. (Form fields in a PDF aren't fillable during the review.) After initiating a shared review, you can also start an email-based review with the same PDF.

Before you start an email-based review, make sure that your email application or webmail account is configured to work with Acrobat.

#### • **Steps to start an email-based review**

- 1 If you're using Acrobat 2017 or Acrobat DC 2015 (Classic), skip to the next step. If you're using Acrobat DC, do the following before you initiate the review:

- a Go to **Edit > Preferences**. The Preferences dialog box is displayed.
- b In the left pane, click **Reviewing**. Under the **Shared Review Options** section, deselect the **Share For Review Using The Adobe Document Cloud** check box, and then click **OK**.

- 2 Choose **Tool > Send For Review**.

The Send for Comments toolset is displayed in the secondary toolbar.

- 3 Click **Send For Comments By Email**.

- 4 If prompted, enter information in the **Identity Setup** dialog box.

- 5 Specify a PDF if it isn't already open, and then click **Next**. The PDF that you specify becomes the master file. Merge the comments you receive from reviewers into this file.

- 6 Specify reviewers by typing their email addresses. Insert a semicolon or a return between each address. Click

**Address Book** to select email addresses from your email application or webmail address book.

- 7 Preview and edit the email invitation as needed, and then click **Send Invitation**.

- 8 Select an email client to send the invite and click **Continue**.

A copy of the PDF is sent to the reviewers as an attachment. When this PDF attachment is opened, it presents commenting tools and instructions.

#### • **Steps to merge comments**

After you receive comments from reviewers, you can merge the comments into the master PDF.

- 1 After a reviewer sends you comments, open the attached file in your email application. If the email application can't find the original version of the PDF, it prompts you to browse for it.

It's possible to forward comments to the initiator if you didn't initiate the review. First merge these comments into your copy of the PDF. Then send the comments. If you've sent your comments already, the initiator receives only new comments. Merged comments retain the original author name.

- 2 If you initiated the review, the **Merge Comments** dialog box appears. Select one of the following options:

**Yes**, Opens the master copy of the PDF and merges all comments into it. After comments are merged, save the master PDF.

**No, Open This Copy Only** Opens the reviewer's copy of the PDF with comments. If you select this option, you can still merge comments by choosing **Comments > Merge Comments Onto Master PDF**.



**Cancel** Closes the reviewer's PDF that contains comments.

Your recipients get an email notifying them that the file is shared with them for review. Each recipient will receive a unique link. Anyone with access to the link can join as a reviewer.

## Hosting shared reviews on SharePoint or Office 365 sites

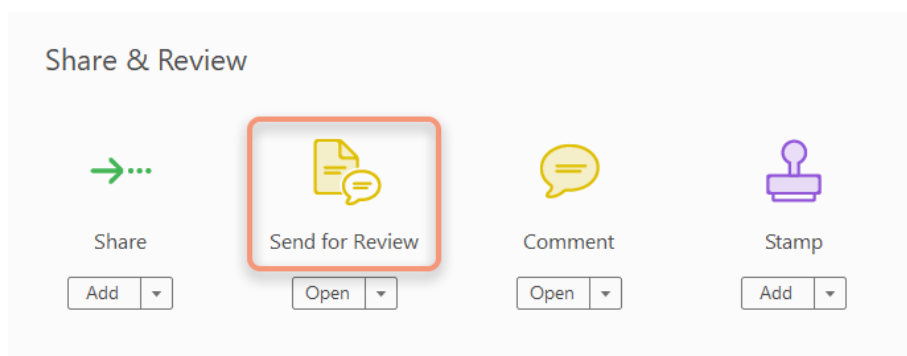
Shared reviews are the most collaborative form of review because participants can read and reply to the comments of other participants. Comments from participants are stored in a repository on an internal server. Acrobat synchronizes comments at regular intervals to download all the latest changes. Reviewers are notified of new comments as they are added, and they can see and reply to comments made by other reviewers.

You can use your own internal server location, such as a Microsoft SharePoint workspace/subsite, if your recipients work behind a firewall and all have access to a common server.

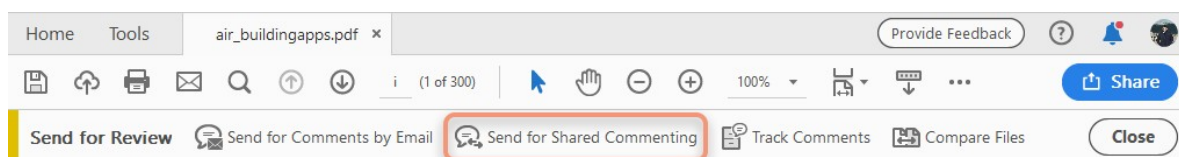
### Initiate SharePoint-based shared review using Acrobat

Before you initiate a review, ensure that you have a SharePoint site and reviewers have write permission to your site. Now, to host the shared review, you can do one of the following:

- Let Acrobat automatically create and configure a document library within your SharePoint server's subsite.
  - Choose a subsite and the respective document library that you may have already created and configured.
- 1 Open the PDF document in Acrobat, and then select **Send for Review** in the **Tools** pane.

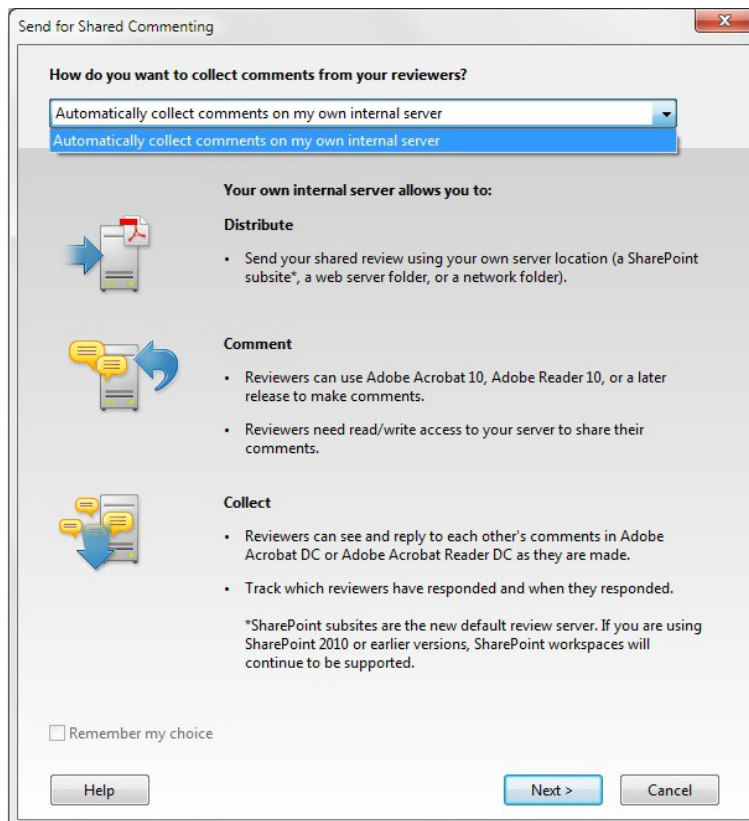


- 2 Select **Send for Shared Commenting** in the toolbar.

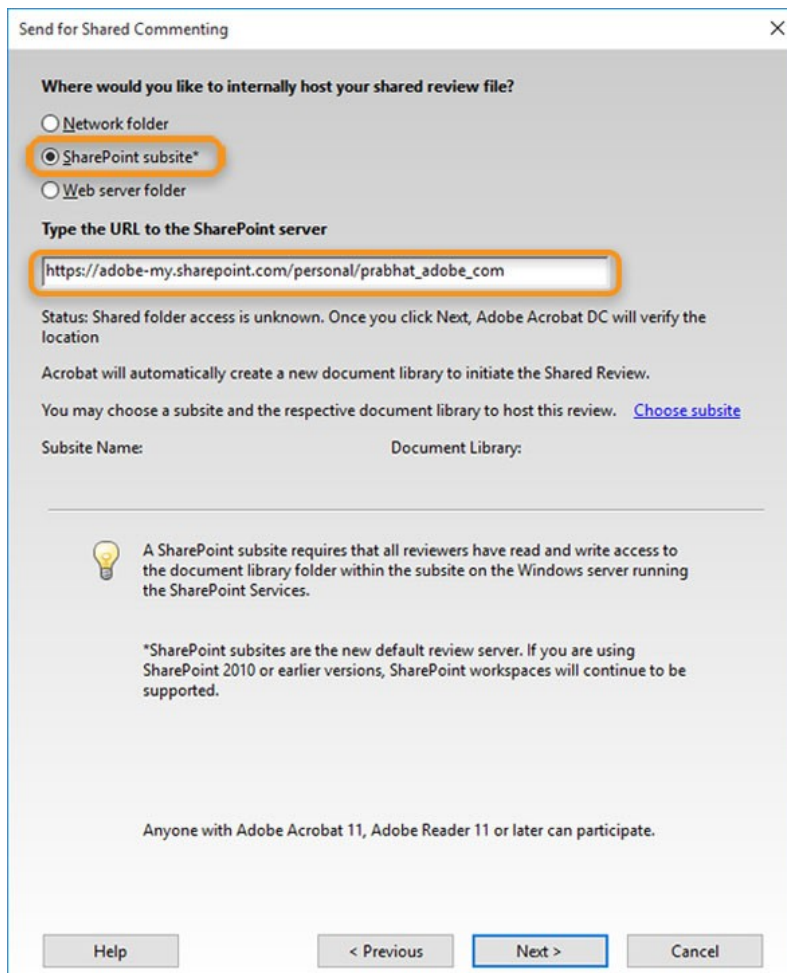


- 3 Select **Automatically collect comments on my own internal server** from the drop-down menu, and then click

**Next.**



- 4 Choose **SharePoint subsite**, and then provide the URL of your subsite on the SharePoint server. Click **Next**.



Acrobat automatically creates and configures a new document library (named AcrobatSharedReviews) within your subsite to initiate the shared review.

If you don't want Acrobat to automatically configure the review, you can click Choose a subsite to select the document library that you have already created and configured.

- 5 Choose distribution method and the way the file should appear when it's sent, and then click **Next**.

The dialog box is titled "Send for Shared Commenting". It contains two sections with radio button options:

- How do you want to distribute your shared review file?**
  - ☒ Send using Adobe Acrobat DC
  - ☐ Save a local copy and manually send it later
- How do you want the shared review file to appear when it is sent?**
  - ☐ As a link within the message
  - ☒ As an attachment to the message

Below these options is a lightbulb icon and a note: "Using the 'Send using Adobe Acrobat DC' option, one can choose to send the email using installed email client or configure web based mail accounts."

At the bottom are three buttons: "< Previous", "Next >" (highlighted in blue), and "Cancel".

- 6 To save this shared review profile for future use, provide a name and then click **Next**, or click **Next** to use the default.

The dialog box is titled "Send for Shared Commenting". It contains a text input field and a summary section:

- Provide a name for this server profile**  
The text input field contains "My SharePoint Subsite (send as attachment)".
- Configuration Summary**
  - You chose to send the file as an attachment automatically using Adobe Acrobat DC.

Below the summary is a lightbulb icon and a note: "Provide a profile name that you will recognize in the future so that you can re-use this profile for other distributions. The profile is saved with the options shown here."

At the bottom are three buttons: "< Previous", "Next >" (highlighted in blue), and "Cancel".

- 7 Enter all your reviewers' email addresses, make appropriate change to the subject, message, and review deadline, and then click **Send**.

Send for Shared Commenting

**Delivery Method:** SharePoint Subsite (send as attachment)

**To...** reviewers@domain.com

**Cc...**

**Subject:** Please join the review of Basic\_SEO\_and\_Publishing\_Checklist\_review.pdf

**Message:** C:\Work\Acrobat\_DC\SharePoint\Basic\_SEO\_and\_Pub... [Reset default message](#)

You are invited to review the document "Basic\_SEO\_and\_Publishing\_Checklist\_review.pdf". You can use Adobe Acrobat 10 or Adobe Reader 10, or later, to review this document.

Click the attachment to open it in Adobe Acrobat DC or Adobe Acrobat Reader DC, and make your comments using the Comment & Markup tools. When you are finished, click Publish Comments to return your comments to the author and all other reviewers.

Get the free latest version of Adobe Acrobat Reader DC from:

**Review Deadline:** 3/14/2016 12:00:00 AM

[Help](#) [< Previous](#) [Send](#) [Cancel](#)

## Participating in a PDF review

### Review a PDF hosted in Adobe Document Cloud

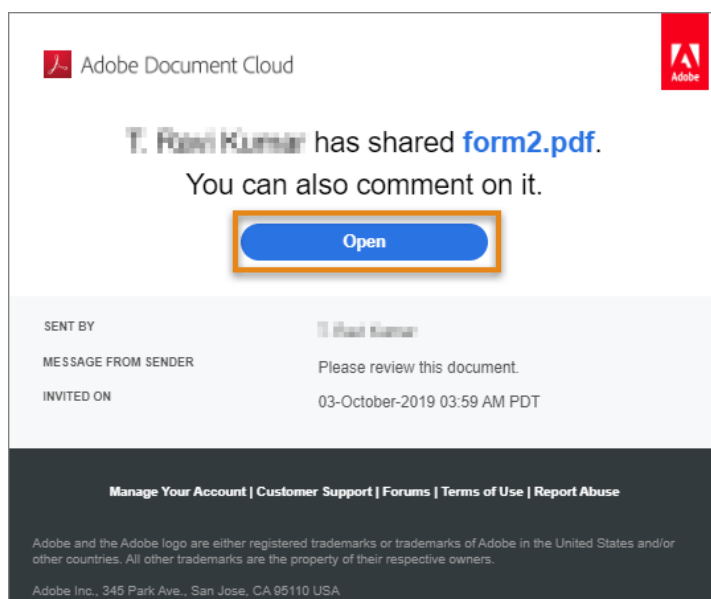
If the initiator shared the PDF using the Adobe Document Cloud review service, the email invitation includes a link to the review PDF. When you click the link, the PDF opens in a web browser. You can add comments in the PDF using the commenting tools available in the browser window. No sign-in required. From the web, you can also launch Acrobat Reader DC or Acrobat DC desktop application to add comments.

You can join the review in one of the following ways:

- **Join the review using a web browser**

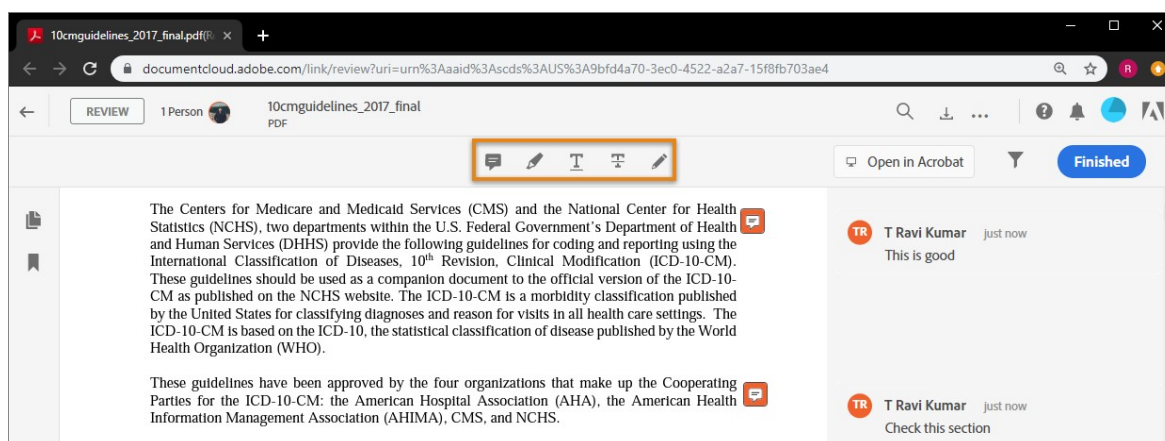
- 1 In your review email invitation, click the link or the **Review** button.

**Note:** Below is an example email invitation sent via Adobe Document Cloud. The invitation may look different if the initiator sent you a public link to the review PDF in an email.



- 2 The PDF opens in a web browser. Enter as a guest, or sign in with your Adobe ID and password. Signing in allows you to use @ mention tags, edit or delete your comments anytime.

- 3 Add comments to the PDF using the commenting tools. All reviewers can see your comments.



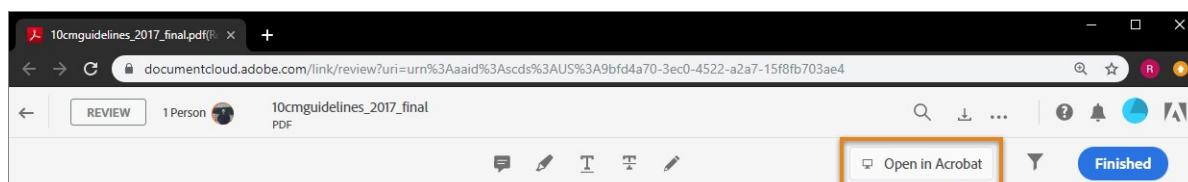
- 4 While reviewing, you can also do the following:

- Use the @ mention to get the reviewer's attention. Use of the @ mention sends a notification to the named reviewer.
- Filter Comments based on comment status like Unread, Resolved, @ mentions, or comment by a reviewer.
- Use the Options Menu (...) to view all reviewers, copy shared link, remove yourself as a review participant, or report abuse.

- 5 When you have finished your review, click **Finished**. A notification is shown in Acrobat DC and an email is sent to the initiator.

• **Join the review using Acrobat DC**

- 1 In your review email invitation, click the link or the **Open** button. The PDF opens in a webbrowser.
- 2 In the toolbar, click **Open In Acrobat**. The PDF is downloaded and opened in Acrobat Reader DC or Acrobat DC depending on which application is the default PDF owner.



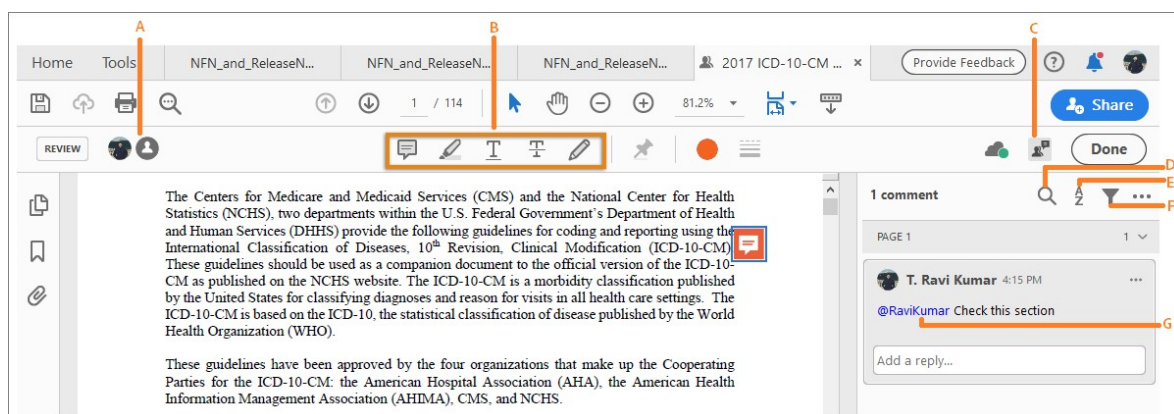
To join the review, you must have the latest version of Acrobat Reader DC or Adobe Acrobat DC installed.

- 3 In Acrobat Reader DC or Acrobat DC, add comments to the PDF using the commenting tools. The comments are automatically saved, and all reviewers can see your comments.

If you are not connected to the Internet, you can still add comments to the PDF. The comments will be saved to the Document Cloud, whenever you connect to the Internet.

- 4 While reviewing, you can also do the following:

- Use the @ mention to get the reviewer's attention. Use of the @ mention sends a notification to the named reviewer.
- Use Search Comments field to search for a specific term.
- Sort Comments (A-Z) based on page, author, date, unread status, or colour.
- Filter Comments based on comment status like Unread, Resolved, Unresolved, @ mentions, or comment by a reviewer, comment types, and colour.
- Use the Options Menu (...) to edit, mark as unread, resolve, or delete the selected comment.
- Check the review status for all the participants by clicking the reviewer avatar in the upper-left corner.



A Click to view all participants B Annotation tools C Click to toggle between managing the shared file and viewing comments D Search comments E Sort comments F Filter comments G @Mention

- 5 When you have finished your review, click **Done**. The review PDF is closed. The initiator gets a notification in Acrobat/Reader and an email is sent.

## Review a PDF hosted on SharePoint, WebDAV server, or a Network folder

When you receive an email invitation to a PDF review, the invitation typically includes the PDF as an attachment or provides a URL to the PDF. Alternatively, some invitations include a Forms Data Format (FDF) attachment. When opened, an FDF file configures your review settings and opens the PDF in Acrobat.

PDFs in a review have special features, including commenting tools and a document message bar with instructions. Use the commenting tools to add comments to the PDF and then submit them. Either publish the comments to a comment server where others can see them, or send comments as an email attachment to the review initiator.

It's possible to receive a PDF that doesn't include special features. If so, add your comments using tools in the **Tools > Comment** toolbar. Then save the PDF and send it back.

To review the PDF later, reopen it from the **Tracker**. Doing so ensures that your comments are added to the tracked copy of the PDF and that the initiator receives your comments. If you don't send or publish your comments right away, save the PDF before you close it to avoid losing your comments. Until the initiator receives your comments, they appear only in your local copy of the PDF and aren't visible to other reviewers.

### • Steps to join a review

- 1 In your email application, open the PDF by clicking the URL or double-clicking the attachment (PDF or FDF).
- 2 Do one or more of the following, if prompted:
  - Log in to Adobe Document Cloud with your **Adobe ID** and password.
  - Click **Connect** in the **Shared Review** dialog box.
  - Click **OK** in the Welcome To **Shared Review** window. This window shows the review deadline, participants, whether each reviewer has made any comments, and the comment server location.
  - Type your name, email address, company name, and job title.
- 3 Save the file to a location that you can find easily, such as the desktop.
- 4 Add comments to the PDF using tools in the **Tools > Comment** toolbar. To delete a comment, select it and press **Delete**. (You can only delete the comments that you made.)
- 5 Do all of the following that apply:
  - If you're notified that new comments from other reviewers are available, click the message. New comments appear in the PDF.
  - To find out if new comments are available from other reviewers, click the **Check For New Comments** button.



- 6 Submit your comments by clicking **Publish Comments** or **Send Comments To Review Initiator** in the document message bar.

When you send comments, a PDF containing your comments is sent as an email attachment to the review initiator. When you publish comments, your comments are saved to the comment server.

- **Options in the document message bar**

The options in the document message bar depend on how the initiator set up the review and whether you can access the comment server.

**Check For New Comments** Prompts Acrobat to synchronize comments between the comment server and the local hard drive. If you don't click this button, Acrobat checks for new comments every 10 minutes if the document is open and every hour if the document is closed.

**Merge Comments** Copies the comments in the open PDF to your copy. This option is available only for PDFs you receive from reviewers in email-based reviews.

**Publish Comments** Available only in shared reviews. Uploads your new comments to the comment server. This button is disabled if the review has ended.

**Save An Archive Copy** Available only in shared reviews, when a review has ended. Saves a copy of the document with review comments to your hard drive.

**Send Comments** Creates an email message addressed to the review initiator that contains the commented PDF as an attachment. This option is always available for reviewers in email-based reviews. It appears in shared reviews if the reviewer has chosen to work offline or if an attempt to connect to the comment server has failed.

**Status** An icon that displays the connected state of the comment server. The icon appears as the last attempt successful icon, the last attempt unsuccessful icon, or the attempting to connect icon. If you click the icon, a menu with additional options appears: **Track Reviews** opens the **Tracker**; **Save As Archive Copy** saves a copy of the PDF that is no longer connected to the review; **Work Offline** lets you work in offline mode, in which you can make comments but cannot publish them until you switch back to online mode. To switch to online mode, click **Reconnect To Server**.

- **Check for newly published comments**

When you participate in a shared review, Acrobat synchronizes published comments on your local hard drive with the comments on the server. Acrobat notifies you when new comments are available. Because synchronization continues after the PDF is closed, you'll continue to receive notifications.

Messages in the notification area inform you when new reviewers join the review, when updates occur (multiple reviews), when deadlines change, and when synchronization attempts fail. They also inform you when a new broadcast subscription is added in the **Tracker**. You can change the frequency of messages and of comment synchronization, and you can manually trigger the synchronization process.

To view new comments in a shared review, you must be able to connect to the network where the comment server is located. If you can't connect, check the server status in the **Tracker** to determine the cause of the problem.

Click the **Check For New Comments** button in the document message bar.

- **Send comments in email**

If you review a PDF offline or outside a firewall, or if you lose your connection to the comment server, you can send your comments in an email message.

- 1 Choose **File > Send File > Attach To Email**.
- 2 In the **Send Email** dialog box, select **Default Email Application**, or **Use Webmail** and choose your webmail client from the **Select** menu.
- 3 Click **Continue**, and follow the onscreen instructions.

If the PDF exceeds the 5-MB file-size limit, Acrobat prompts you to send your comments in a Forms Data Format (FDF) file. The initiator can import this smaller file. To adjust the limit, open the Preferences dialog box and select Reviewing. Then enter the new value for Send Comments As FDF For Files Greater Than [#] MB.

- **Publish comments from other reviewers**

When you participate in a review, you can receive comments from other reviewers. For example, if a reviewer can't access the comment server, the reviewer can send you comments. As another example, suppose that you solicited feedback from people who weren't initially invited to the review. Those reviewers can return a copy of the review PDF to you with their comments. By taking ownership of the comments, you can share them with everyone in the review.

- 1 **Open** the PDF that contains comments.
- 2 Do one of the following:
  - Click **OK** when asked if you want to publish comments for this reviewer. The published comments appear in the PDF. Your name appears in the title bar and the author's name appears in the body of the comments, preceded by the text **On behalf of**.
  - Click **Yes** when asked if you want to merge comments, or click **Merge Comments** in the document message bar and then click **Send Comments**. Add email addresses for other reviewers, as needed, and then click **Send**.
  - In Acrobat or Reader, open a copy of the PDF and choose **Comment > Comments List > Options > Import Data File**. Select a file with comments from reviewers. Add email addresses for other reviewers, as needed, and then click **Send**.

Only new or edited comments are published or sent.

- **Rejoin a review**

Use the **Tracker** to reopen PDFs in an active review. The **Tracker** only displays PDFs that you've saved. If you didn't save a PDF the first time you opened it, reopen the PDF from your email application.

- 1 Choose **View > Tracker**.
- 2 In the **Tracker**, double-click the PDF.
- 3 Add new comments or edit existing comments. To delete a comment, select it and press **Delete**. (You can delete only comments that you made.)

Acrobat removes deleted comments from the online PDF the next time it synchronizes comments. If you delete comments that you sent in an earlier email message, they aren't deleted in the initiator's document.

- 4 Click **Publish Comments** in the document message bar. Only new or edited comments are published or sent.

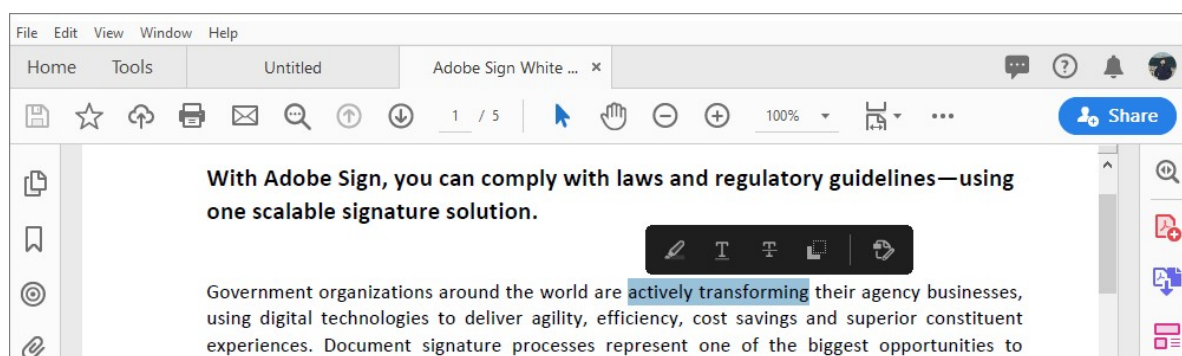
## Use annotation and drawing markup tools to add comments in PDFs

Add comments to PDF files with highlights, sticky notes, a freehand drawing tool, and mark-up tools.

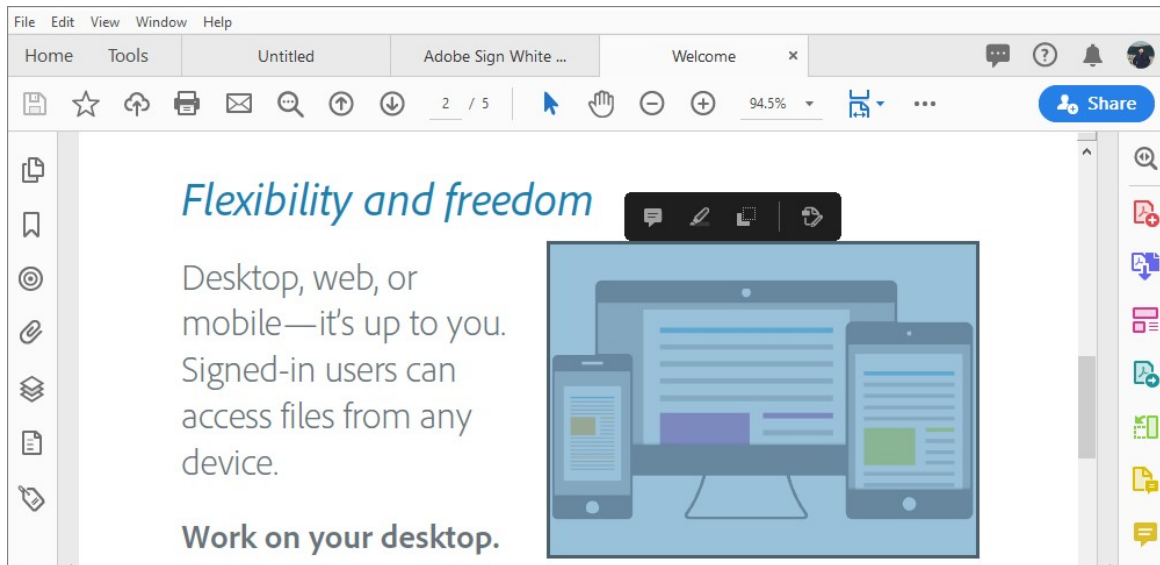
### Add comments while viewing a PDF document

With the May 2019 release of Acrobat DC, you can use quick actions in a floating toolbar to add comments while viewing a PDF. You do not have to open the commenting tool to access these actions. The following quick actions are available for commenting based on your selection in a PDF:

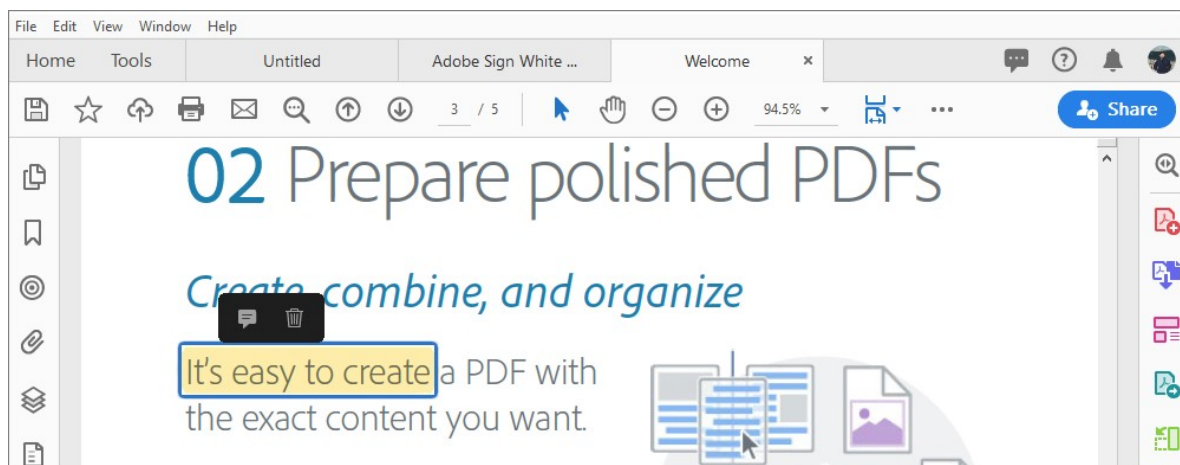
- **Actions on text selection:** You can Highlight Text, Underline Text, Strikethrough Text, Copy Text, and Edit Text & Images.



- **Actions on image selection:** When you select an image, you can perform actions like Add Sticky Note, Highlight Text, Edit Text & Images, and Copy Image.



- **Actions on highlight selection:** When you select an existing highlight comment in a PDF you see quick actions to Add Note or Delete the comment.



## Annotations and drawing markup tools overview

You use annotation and drawing markup tools to add comments. The commenting tools are made available in the secondary toolbar of the Comment feature. Comments are notes and drawings that communicate ideas or provide feedback for PDFs. You can type a text message using the Sticky Note tool. Alternatively, you can use a drawing tool to add a line, circle, or other shape and then type a message in the associated pop-up note. Text-editing tools let you add editing marks to indicate changes that you want in the source document. Most commenting and markup tools don't appear in the toolbar until you enable the Commenting feature.

## Show annotations and drawing markup tools

Annotations and markup tools don't appear by default, except when you open a PDF in a managed review workflow.

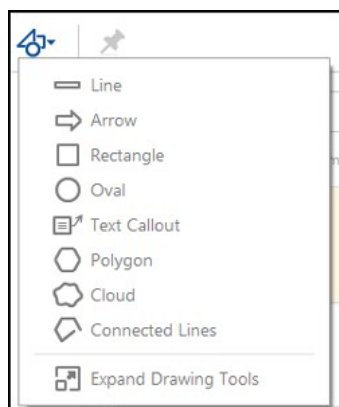
- 1 Choose **Tools > Comment** to open the Comment toolbar. The comments that you add to the document are displayed in the right pane.



Comment toolbar

To see the labels along with the tool icons, right-click on the Comment toolbar and select **Show All Labels**.

- 2 The drawing markup tools are grouped under the **Drawing Tools** menu. Click the **Drawing Tools** icon on the toolbar, and then select **Expand Drawing Tools** to add the drawing tools to the secondary toolbar.



*Drawing Tools menu*

### Select an annotation or drawing markup tool

- Open the **Comment** toolbar and select the desired annotation tool.
- To select the drawing markup tool, open the **Comment** toolbar and click the **Drawing Tools** icon. Select the desired tool from the **Drawing Tools** menu.

After you make an initial comment, the tool changes back to the Select tool so that you can move, resize, or edit your comment. (The Pencil and Highlight Text tools stay selected.)

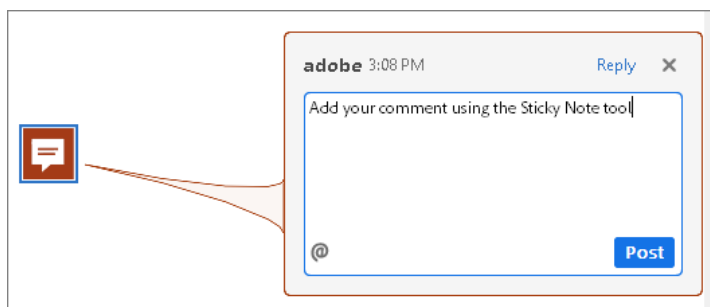
### Keep an annotation tool selected

You can add multiple comments without reselecting the tool.

- 1 In the Comment toolbar, select the tool you want to use (but don't use it yet).
- 2 Click the **Keep Tool Selected** icon

### Add a sticky note

The most common type of comment is the sticky note. A sticky note has a note icon that appears on the page and a pop-up note for your text message. You can add a sticky note anywhere on the page or in the document area.



*Use the Sticky Note tool to add a text message in a pop-up note.*

### Add a sticky note comment

- 1 Select the **Sticky Note** tool in the Comment toolbar, and click where you want to place the note.
- 2 Type text in the pop-up note. You can also use the Select tool to copy and paste text from a PDF into the note.

If you close the pop-up note, your text remains.

### Edit a sticky note comment

- 1 Click or double-click the note icon.
- 2 Make changes, as needed:
  - To resize the pop-up note, drag the lower-left or lower-right corner.
  - To change the text formatting, click the **Text Properties** icon in the Comment toolbar, and select the text, and then select the property you want in the toolbar.

Use the Commenting panel in the Preferences dialog box to change the font size, default pop-up behaviour, and other settings for creating and viewing comments

After making the desired changes, click the close (X) button in the upper-right corner of the pop-up note, or click outside the pop-up note.

### Copy partial text in a sticky note comment

- 1 Click or double-click the note icon.
- 2 Select the text, and then right-click and copy text.

### Delete a sticky note

- 1 Select the **Sticky Note** tool, the Hand tool, or the Select tool.
- 2 Select the note icon, and press **Delete**.

Alternatively, double-click the note icon and choose Delete from the Options menu of the pop-up note.

### Add a text comment

Use the Add Text Comment tool to type text anywhere on the PDF page. The Add Text Comment tool is similar to the Add Text Box tool.

- 1 Choose the **Add Text Comment** tool from the Comment toolbar.
- 2 Click on the page to place the cursor
- 3 To change the text formatting, click the **Text Properties** icon in the Comment toolbar, and select the text, and then select the property you want in the toolbar.

### Add a line, arrow, or shape

When selecting a drawing tool, consider the effect you want.

- 1 Choose **Tools > Comment**. In the **Comment toolbar**, click **Drawing Tools** and select the drawing markup tool:
  - The Rectangle tool, the Oval tool, the Arrow tool, and the Line tool let you create simple shapes.
  - The Cloud tool and Polygon tool create closed shapes with multiple segments. The Polygon Line tool creates open shapes with multiple segments.
  - The Pencil tool creates free-form drawings, and the Pencil Eraser tool removes the pencil markups

To specify the line width, colour, and other properties before you draw, select the desired tool, and press **Ctrl+E** to open the properties toolbar. Set the desired options in the **Properties toolbar**.

- 2 Draw in the PDF:
  - To create a cloud or polygon shape, click to create the start point, move the pointer, and click to create each segment. To finish drawing the shape, click the start point, or right-click and choose Complete from the menu. Double-click to end a polygon line.
  - To draw a line, arrow, or rectangle, either drag across the area where you want the markup to appear, or click twice: once to create the start point and once to create the end point.
  - To draw a square or circle, or to draw a line that's horizontal, vertical, or at a 45° angle, press **Shift** while you draw.

- To draw free-form lines using the **Pencil** tool, drag where you want to begin drawing. You can release the mouse button, move the pointer to a new location, and continue drawing. To erase parts of the drawing, select the **Pencil Eraser** tool and drag across the areas of the drawing that you want to remove.
- 3 To edit or resize the markup, select it and drag one of the handles to make your adjustments.
  - 4 To add a pop-up note to the markup, select the Hand tool, and double-click the markup.
  - 5 (Optional) Click the close button in the pop-up note. A note icon appears to the right of the markup to indicate the presence of text in the pop-up note.

To delete a drawing markup, select it and press Delete.

## Group and ungroup markups

You can group two or more markups so that your comments function as a single comment. You might group markups temporarily to move them to a new location or to modify their properties rather than editing each one individually. Grouping also helps to distinguish your markups from other reviewers' markups in a document review.

You cannot group text edit markups.

### Group markups

- 1 Using the Select tool or the Hand tool, select a markup.
- 2 Ctrl-click/Command-click to select the markups you want to group.
- 3 Right-click within the selection, and choose **Group**.

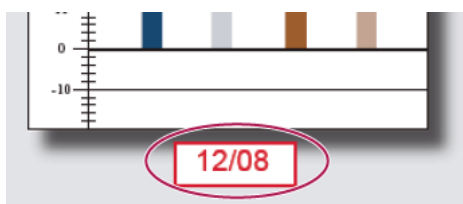
### Ungroup markups

Right-click the grouped selection, and choose **Ungroup**.

## Add comments in a text box or callout.

You can use the **Text Box** tool to create a box that contains text. You can position it anywhere on the page and adjust it to any size. A text box remains visible on the document page; it doesn't close like a pop-up note.

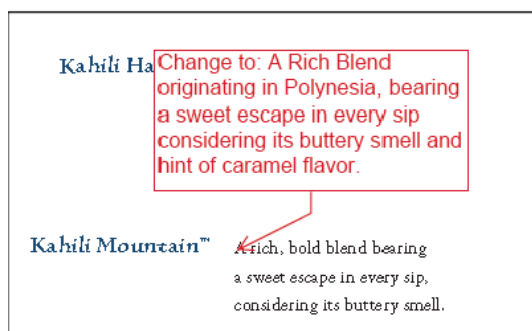
Text font and size are based on the system default settings.



You can use the Callout tool to create a callout text box. Callout text boxes are especially useful when you want to single out—but not obscure—a particular area of a document. Callout text boxes have three parts: a text box, a knee line, and an end-point line. You can resize each part by dragging a handle. The knee line can be resized in one direction only; horizontal knee lines can be resized horizontally only; vertical knee lines can be resized vertically only. The text box expands vertically as you type so that all text remains visible.

You can move the text box itself or together with the end-point line. The text box moves around a stationary anchor point—the arrow on the end-point line—which is created when you first click in the PDF. You can modify the color and appearance of the text box and add arrows or leaders to the end-point line.





### Add a text box

- 1 Choose the **Add Text Box** tool from the Comment toolbar.
- 2 Click in the PDF.
- 3 Choose the **Text Properties** icon in the Comment toolbar, and then select the colour, alignment, and font attributes for the text.
- 4 Type the text.  
Text wraps automatically when it reaches the right edge of the box.
- 5 (Optional) To make further changes to the text box:
  - Using the **Select** tool or the **Text Box** tool, click an edge of the text box to select it, and then drag a corner to resize it. Use the **Properties** toolbar to change the border and fill options.
  - Double-click the text box to edit the text or change the text attributes. Drag across text to select it, and then select options from the **Properties** toolbar.
- 6 To delete the text box, select it, and then press **Delete**.

You can also paste a block of text by selecting and copying the text in any application, selecting the Hand tool in Acrobat, and choosing Edit > Paste.

### Add a callout

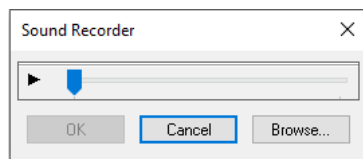
- 1 In the Comment toolbar, click **Drawing Tools** and choose the **Add Text Callout** tool.
- 2 Click once to set the location of the end point, and click again to set the location of the textbox.
- 3 Choose the **Text Properties** icon in the Comment toolbar, and then select the colour, alignment, and font attributes for the text.
- 4 Type the text.  
Text wraps automatically when it reaches the right edge of the box.
- 5 (Optional) To make further changes to the text box:
  - To resize the callout, select it and drag any of the handles that appear.
  - To move the text box, click inside the box and drag it.
  - To move the entire callout, click either the end-point line or an edge of the text box, and drag it.
  - To change the colour, opacity, or line characteristics, use the Select tool to right-click the callout, choose Properties, and select the options you want.

### Add an audio comment

You can use the **Record Audio Comment** tool to add a pre-recorded WAV or AIFF file as a comment or to record and place an audio comment in a document. Audio attachments appear in the Comments list and can be played back on any platform. However, the appropriate hardware and software for playing audio files must be installed.

## Add a prerecorded audio comment

- 1 Choose the **Record Audio** tool from the Comment toolbar.
- 2 Click in the PDF where you want to place the audio comment. The Sound Records dialog box appears.



*The Sound Recorder dialog box without the record button.*

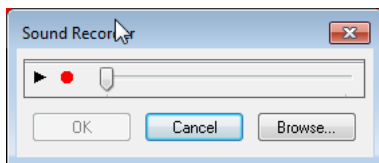
The above dialog box appears when a recording device is not configured on your system.

- 3 Click **Browse**, and select the audio file you want to add.
- 4 (Optional) To hear the audio comment, click the **Play** button . When you're finished, click the **Stop** button and then click **OK**.
- 5 Specify options in the **Specify Attachment Properties** dialog box, and then click **OK**.

## Record an audio comment

Before you record an audio comment ensure that your system has a recording device installed and configured.

- 1 Choose the **Record Audio** tool from the Comment toolbar.
- 2 Click in the PDF where you want to place the audio comment. The Sound Recorder dialog box appears.



*The Sound Recorder dialog box with the record button.*

The above dialog box appears when a recording device is configured on your system.

- 3 In the dialog box that appears, click the **Record** button and then speak into the microphone. When you've finished recording, click the **Stop** button , and then click **OK**.
- 4 Specify options in the **Sound Attachment Properties** dialog box, and then click **OK**.

## Add comments in a file attachment

Use the **Attach File** tool to embed a file at a selected location in a PDF, so that the reader can open it for viewing. By adding attachments as a comment, you can reference longer documents that can't easily be pasted into a pop-up note or text box. If you move the PDF to a new location, the embedded file automatically goes with it. To view an attachment, the reader must have an application installed that can open the attachment.

Be sure to use the Attach tool when attaching files for a document review. Document-level file attachments that you attach using the Attach A File tool from the Tools > Edit PDF > More menu aren't tracked with other comments in a review workflow and may cause your attached comments to be lost.

- 1 Choose the **Attach File** tool from the Comment toolbar.
- 2 Click in the PDF where you want to place the attachment.
- 3 Select the file that you want to attach, and then click **Open**. If you're attaching a PDF, you can highlight areas of interest in the file using comments.
- 4 In the **File Attachment Properties** dialog box, select the settings for the file icon that appears in the PDF.

The comment attachment also appears in the Attachments tab (in the left navigation pane) with a page number indicating its location.

To delete the attachment, right-click the attached comment icon, and choose Delete.

### Paste images as comments

You can use the Paste Clipboard Image As Stamp Tool to add images to a PDF. You can copy most image formats from drawing and image-editing applications, such as **Adobe Photoshop** and Adobe Illustrator. If you want to add the image to PDFs repeatedly, create a custom stamp of the image.

- 1 Copy an image by doing one of the following:
  - In Acrobat, choose **Edit > Take A Snapshot**, and select an image from a PDF.
  - In another application, select an image and choose **Edit > Copy**.
- 2 Open a PDF.
- 3 Choose **Tools > Comment**. In the Comment toolbar, click the **Add Stamp** tool and select **Paste Clipboard Image As Stamp Tool**.
- 4 Click in the PDF where you want the image to appear.
- 5 Do any of the following:
  - To move the image, drag it.
  - To resize the image, select it and then drag one of its handles. Press the Shift key when resizing the image to maintain the original proportions.
  - To change the image properties, right-click it and choose Properties.
  - To delete the image, right-click it and choose **Delete**.

### Commenting preferences

Commenting preferences affect both the appearance of and the way you view annotations and markups in PDFs.

A reviewer can place comments anywhere within the document frame. As a result, sometimes you need to scroll or zoom out to see comments that are located off the page.

In the Preferences dialog box under Categories, select Commenting.

### Viewing comments

**Font, Font Size In Windows** you can determine the font and the size of text in pop-up notes. This setting applies to all new and existing comments.

**Pop-up Opacity** Determines the opacity of comment pop-up notes in values from 1 to 100. When a pop-up note is open but not selected, an opacity value of 100 makes the note opaque, while lower values make it more transparent.

**Enable Text Indicators And Tooltips** Shows a tool tip when you place the pointer over a comment that includes a pop-up note. The tool tip contains the author name, comment status, and two lines of the text. Selected by default.

**Print Notes And Pop-ups** Specifies that pop-up notes associated with comments, and icons for note, audio, and file attachments print exactly as they appear on the page.

Instead of selecting this option, you can print comment text in various layouts by choosing File > Print, and click

**Show Lines Connecting Comment Markups To Their Pop-ups On Mouse Rollover** When you place the pointer over a comment markup (such as a highlight or a note icon), the shaded connector line appears. Selected by default.

**Ensure That Pop-ups Are Visible As The Document Is Scrolled** As you scroll a PDF, the pop-up notes on a given page shift to stay in view within the document pane. Selected by default.

## Pop-up open behavior

**Automatically Open Comment Pop-ups For Comments Other Than Notes** A pop-up note appears when you create a comment using a drawing tool, the Stamp tool, or the Pencil tool.

**Hide Comment Pop-ups When Comments List Is Open** Helps reduce screen clutter when a page includes many comments. Selected by default.

**Automatically Open Pop-ups On Mouse Rollover** When you place the pointer over a comment of any type, including drawing markups and stamps, the pop-up note opens.

## Making comments

**Always Use Log-in Name For Author Name** Determines which name appears in the pop-up note you create. If this option is selected, the **Login Name** in the Identity panel of the Preferences dialog box is used. If this option isn't selected, the default name you specify for Author in a comment properties dialog box is used. Selected by default.

**Create New Pop-ups Aligned To The Edge Of The Document** Aligns pop-up notes with the right side of the document window, regardless of where the comment markup (such as a note icon or highlighting comment) is added. If this option is deselected, the pop-up note appears next to the comment markup. Selected by default.

**Allow nested reply to sticky notes (requires restart)** Allows reply to Sticky Notes with a single-thread experience. If this option is selected, each annotation appears like a conversation and all replies appear like a single-thread experience.

**Enable Text Selection For Highlight, Strikethrough and Underline** Allows you to select and copy text for highlight, strike-through, and underline comments

**Show checkbox** Displays the checkbox consistently for all comments.

## Making comments (Acrobat specific)

**Copy Encircled Text Into Drawing Comment Pop-Ups** Copies text that you circle using the drawing tools in the pop-up note associated with the drawing markup.

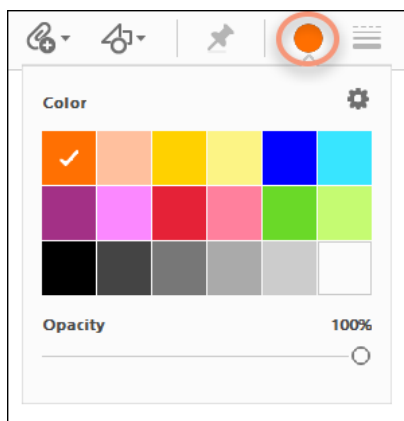
**Copy Selected Text Into Highlight, Cross-Out, And Underline Comment Pop-ups** Copies selected text to the pop-up note associated with text editing comments, such as those created by the **Highlight Text** tool.

## Change the look of your comments

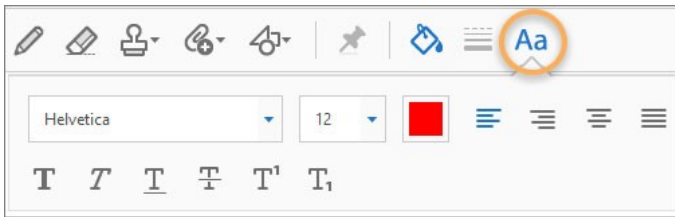
You can change the colour and appearance of comments or markups before or after you create them. You can set the new look as the default appearance for that tool.

To change how your name appears in comments, open the Preferences dialog box, select Commenting, and then deselect Always Use Log-in Name For Author Name.

For the selected tool, you can use the Colour Picker and Text Properties icons available on the Comment toolbar.

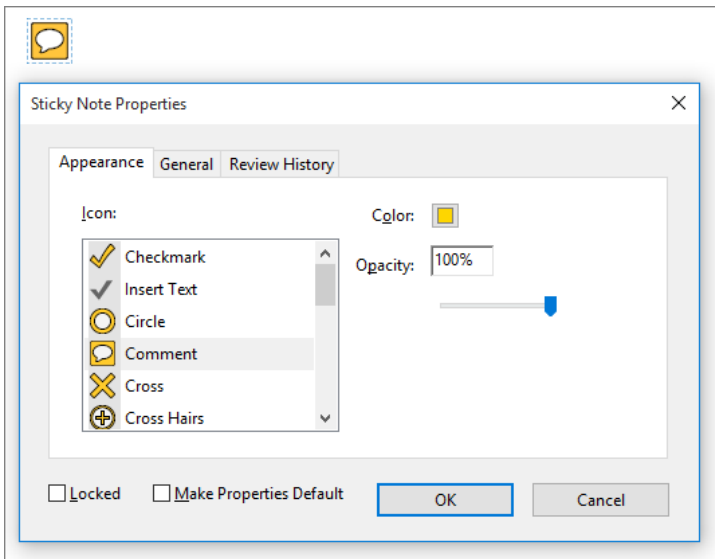


*The Colour Picker tool on the Comment toolbar*

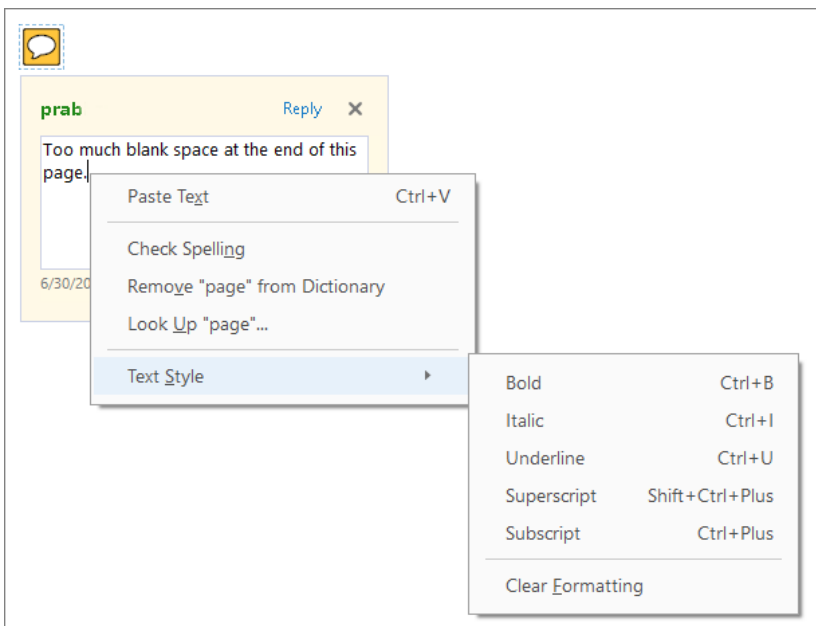


*The Text formatting tool on the Comment toolbar*

Alternatively, you can choose Properties from the right-click context menu, and then select appropriate options.



*Properties, with note icon selected*



*With pop-up text and formatting options*

### Change a comment's look and set it as the default

- 1 After you create a comment, right-click the comment or its icon and then choose Properties from the right-click context menu.
- 2 In the Properties dialog box, do any of the following, and then click **OK**:

- Click the Appearance tab to change such options as the colour and type of icon used. The type of comment selected determines which options are available.
- Click the General tab to change the name of the author and subject of the comment.
- Click the **Review History** tab to see the history of changes people have made to the status of a comment during a review.
- Select Locked at the bottom of the Properties dialog box to prevent the comment from being edited or deleted.
- Select **Make Properties Default** at the bottom of the Properties dialog box to apply these properties to all subsequent comments of this type.

### Set the default look for a tool

- 1 After you create a comment, right-click the comment and choose **Properties**.
- 2 Set the properties as desired, and click **OK**.
- 3 Right-click the comment and choose **Make Current Properties Default**.

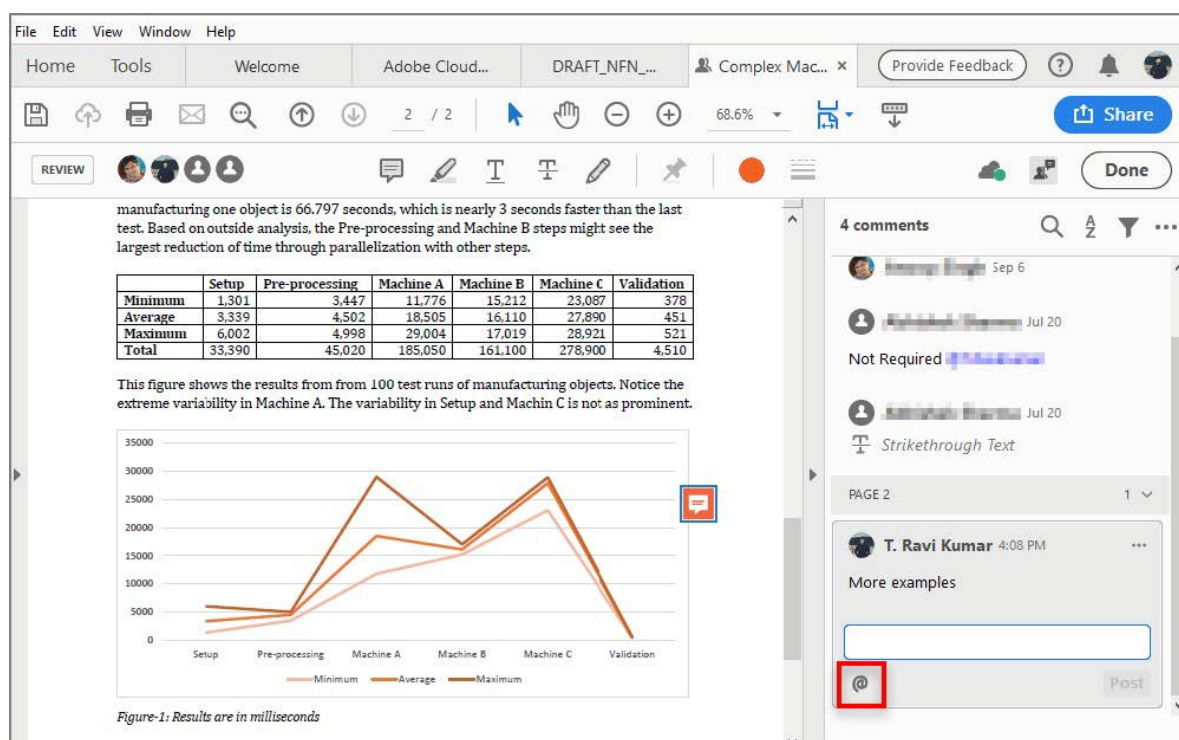
All comments you create using this tool display the properties you set. Existing comments aren't affected, nor is the appearance of text in pop-up notes.

### Draw attention of a reviewer to your comment

Use @mentions to get attention of any reviewer.

When you use @mention in your personal commenting notes in a PDF file, the review mode gets enabled for you. The reviewers get an invitation email with a link to the Document Cloud shared review file.

- 1 In the comment text, click the @ symbol.



- 2 A popup menu will appear with a list of reviewers. Choose the reviewer you want to mention.

## Adding a stamp to a PDF



## Stamp a document

You apply a stamp to a PDF in much the same way you apply a rubber stamp to a paper document. You can choose from a list of predefined stamps, or you can create your own stamps. Dynamic stamps obtain information from your computer and from the Identity panel of the Preferences dialog box, allowing you to indicate name, date, and time information on the stamp.

The Stamp tool appears in the secondary toolbar of the Comment tool.



*Stamp tool categories*

*A Dynamic stamp B Sign Here stamp C Standard business stamp D Custom stamp*

## Open the Stamps palette

Choose **Tools > Comment > Stamps > Show Stamps Palette**.

## Apply a stamp

- 1 Select a stamp by doing one of the following:
  - Click the Stamp tool. The most recently used stamp is selected.
  - In the **Stamps Palette**, choose a category from the menu, and then select a stamp.
- 2 Click the document page where you want to place the stamp, or drag a rectangle to define the size and placement of the stamp.
- 3 If you haven't provided a name in the Identity preferences, the Identity Setup dialog box prompts you to do so.

## Change a stamp's location or appearance

Using the Select tool or the Hand tool, do any of the following:

- To move a stamp, drag it to a new location.
- To resize a stamp, click it, and then drag a corner handle.
- To rotate a stamp, click it, move the pointer over the handle at the top of the stamp, and drag when the rotate stamp icon appears.
- To delete a stamp, right-click the stamp and choose Delete.
- To change the stamp's opacity or the colour of its pop-up note, right-click the stamp, and choose Properties. In the Appearance tab, set the opacity or colour.

## Move a stamp to the favorites list

- 1 Using the Select tool or the Hand tool, select a stamp markup on the page.
- 2 In the secondary toolbar of the **Comment** tool, click the **Stamp** tool and choose **Add Current Stamp To Favourites**.

## Create a custom stamp

You can create custom stamps from a number of different formats, including (but not limited to) PDF, JPEG, bitmap, Adobe® Illustrator® (AI), Adobe® Photoshop® (PSD), and **Autodesk AutoCAD** (DWT, DWG) files.

To add an image to a PDF one time only, simply paste the image into the document. Pasted images have the same characteristics as other stamp comments; each includes a pop-up note and editable properties.

- 1 Choose **Tools > Comment > Stamps > Show Stamps Palette**.
- 2 Click **Import**, and select the file.
- 3 If the file has more than one page, scroll to the page you want, and then click **OK**.
- 4 Choose a category from the menu or type a new category name, name the custom stamp, and then click **OK**.

## Change the name or category for a custom stamp

- 1 Choose **Tools > Comment > Stamps > Show Stamps Palette**.
- 2 Choose the stamp category, right-click the stamp, and choose **Edit**.
- 3 Edit the category or name of the stamp, or replace the image, and then click **OK**.

## Delete a custom stamp

You can delete only the custom stamps that you created, not the predefined stamps. When you delete a stamp, the stamp is removed from the Stamp tool menu, but the stamp file isn't deleted.

- 1 Choose **Tools > Comment > Stamps > Show Stamps Palette**.
- 2 Choose the stamp category from the menu, right-click the custom stamp, and choose **Delete**.

## Delete a custom stamp category

- 1 Choose **Tools > Comment > Stamps > Custom Stamps > Manage Stamps**.
- 2 Select the category you want to delete, and then click **Delete**.

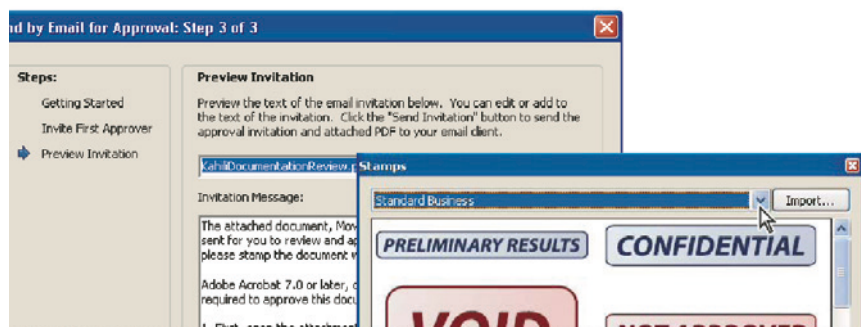
Deleting all stamps in a custom stamp category deletes the custom stamp category.

## **Approval workflows**

### About approval workflows

Acrobat users, can send PDFs as email attachments for others to approve. When participants open an approval request in Acrobat (all languages), they can approve the PDF by adding a digital identity stamp. Then, they can send the PDF to other approvers, or return the PDF to the initiator and other appropriate participants. The initiator can track progress by choosing to be notified each time the PDF is approved. The workflow ends when the last participant adds the final approval. If a PDF isn't approved, the approval workflow must be reinitiated.

If you use **Acrobat Pro** to initiate the workflow, you can invite users of Reader 9 or later to participate by enabling commenting in the PDF.



Wizard sets up approval workflows (left); Stamps palette provides stamps for approving documents (right).

## Send a PDF for approval

When you send a PDF by email for approval, approvers receive the PDF as an email attachment. When recipients open the PDF attachment, they can apply a digital identity stamp from the Stamps palette and then make the appropriate selection in the document message bar.

To send a PDF for approval, use the wizard in Acrobat. The wizard provides on-screen instructions to help you invite approvers, customize instructions, and send the PDF.

In **Acrobat Pro**, the wizard enables commenting in the PDF so that Acrobat Reader users can participate in the approval workflow.

Before you initiate an approval workflow, make sure that your email application is configured to work with Acrobat.

- 1 To start an approval workflow, choose **Share > Send By Email For Approval**.
- 2 If prompted, enter your email address in the Identity Setup dialog box.
- 3 Specify a PDF, and click **Next**.
- 4 Type the email address for the first approver in the To box.
- 5 (**Acrobat Pro**) If you want to enable Reader users to participate or if you want to be notified of the approval status for each participant, specify those options.
- 6 (**Acrobat Standard**) If you want to be notified of the approval status for each participant, specify those options.
- 7 (Optional) Type additional instructions for the first approver at the top of the email message. Only the default text message and instructions are forwarded to subsequent approvers.

The invitation email contains instructions to help participants complete the approval process. Avoid changing or removing this text.

- 8 Click **Send Invitation**.

## Participate in an approval workflow

If you're invited to participate in an approval workflow, you receive an email message that provides step-by-step instructions for approving the attached PDF. When you open the PDF, the Stamps palette opens and the document message bar appears at the top of the PDF.

You can select any of the digital identity stamps in the Stamps palette to approve the document. A digital identity stamp contains identity information that you provide, such as name, title, organization, and email address. You can use an identity stamp in place of a signature. When you apply a stamp, it becomes part of the document page content. You can delete your own stamp during the approval process; however, once the approval process is completed, your stamp is locked. You can't move or delete stamps from other participants.

You can also reject documents that don't meet your standards.

In addition to adding digital stamps to a PDF, you can add other types of comments, including note comments, text edits, custom stamps, and file attachments.

## Approve a PDF

- 1 Open the PDF attachment in the approval invitation email message.

If you haven't added identity information to the stamp, you're prompted to do so.

- 2 Select a stamp from the Stamps palette (**Tools > Stamp > Stamps palette**) . (To view all stamps, scroll or drag a corner to resize the window.)
- 3 Click the document to apply your approval stamp.

To delete a digital identity stamp that you've applied, select it and press Delete. If you select Print, Save A Copy, or Email during the approval process, you can't delete your stamp.

- 4 Do one of the following:

- To send the document to the next approver, click the **Approve** button in the document message bar. In the Send To Next Approver dialog box, type the email address for the next approver in the To box, add addresses for other recipients as appropriate, and click **Send**.
  - To complete the approval process, click the **Final Approval** button in the document message bar. In the Complete Final Approval dialog box, specify whether to send an approval notification from the **Final Approval Method** menu. If you send a notification, type an email address in the To box, add addresses for other recipients as appropriate, and click **Send**. If you don't send a notification, click **Complete**.
- If the **Notify Initiator Of Approval Status Via Email** option is selected, a separate email notification appears, addressed to the initiator. Click **Send** to send this notification.

#### 5 Save the PDF.

If you use the Email button in the toolbar to send the PDF, the PDF is no longer part of the workflow, and approval options aren't available to the recipient of that email message.

### Reject a PDF

If the PDF you received in an approval request doesn't meet the requirements for approval, use the options in the document message bar to reject the document and return it to the initiator. If a PDF is rejected, the approval workflow must be reinitiated.

- 1 Open the PDF attachment in the approval invitation email message.
- 2 Click the **Reject** button in the document message bar.
- 3 In the Reject **And Send** Notification dialog box, type the email address for the initiator in the To box. If the **Notify Initiator Of Approval Status Via Email** option is selected, a separate email message is sent to the approval initiator. Click **Send**.
- 4 Click **Send** in the email message that appears.

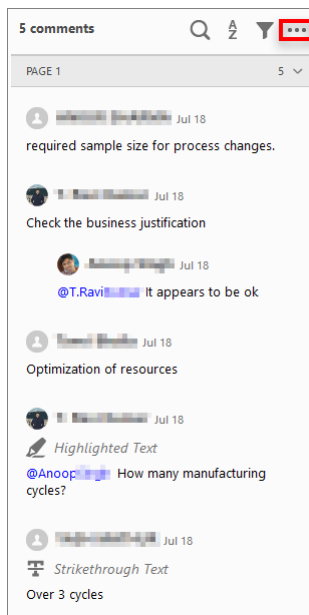
### Add or change identity information for a digital stamp

- 1 Choose **Tools > Stamps > Stamps Palette**.
- 2 In the Stamps palette, select **Digital Identity Stamps**, right-click your stamp, and choose **Edit Identity**.
- 3 In the Identity Setup dialog box, type or edit your name, title, company name, department, and email address, and click **Complete**.

### **Managing comments | view, reply, print**

#### View comments

The Comments list appears in the right pane of the document window. The Comments list displays all comments in a PDF, and it provides a toolbar with common options, such as sorting, filtering, and other options to work with comments.



Comments list

- **Open the Comments list**

- 1 Choose **Tools > Comment**

The Comments toolset is displayed in the secondary toolbar and the Comments list is displayed in the right pane.

- 2 Using the Options menu (...) at the upper-right corner of the Comments list, do any of the following:

- Expand or collapse the comments. Click **Expand All** or **Collapse All** in the **Comments list** options menu.
- Create or **Print Comment Summary**.
- Import and Export comments.
- Export to Word or AutoCAD.
- Specify **Commenting Preferences**.

- **Expand the Comments list**

You can expand the Comments pane for better readability of the long comments.

- To resize the pane, align your cursor along the left boundary of the pane and then hold and drag towards left or right.

- **Sort comments**

You can sort comments in the Comments list by page, author, date, type, unread status, or colour. In a thread of replies, only the first message is sorted, and the reply messages are sorted in the same category as the first message in the thread.

- 1 Choose **Tools > Comment**.

- 2 In the Comment list, choose an option from the **Sort Comments** by menu.

- **Filter comments**

You can hide or show comments based on status, reviewer (author), type, or colour. Filtering affects the appearance of comments in both the document window and the Comments list. When you print or summarize comments, you can specify whether hidden comments are printed or summarized. When you hide a note comment that has been replied to, all other replies in the thread are hidden as well.

In an email-based review, hidden comments aren't included when you send the comments to the initiator.

From the Filter comments menu in the Comments list, do any of the following:

- To clear all filters, click **Clear All**. Alternatively, use Ctrl+8.
- Use the toggle switch to show or hide all comments. Alternatively, use Ctrl+Shift+8 (Windows)
- To filter comments, choose the categories that you want to appear. For example, if you want only sticky note comments that you left unresolved to appear, choose > **Types > Sticky Notes** so that only the sticky note comments appear, and then choose > Status > **Unresolved**, so that only the unresolved sticky note comments appear.
- To open all pop-up notes, right-click an annotation and choose **Open All Pop-Ups**. (Only available if the Comments list is closed)
- To close all pop-up notes, right-click an annotation and choose **Minimize Pop-Ups**. (Only available if the Comments list is closed).

## Reply to comments

Replies to comments are especially useful in shared reviews, when participants can read each other's comments. They can also be used by review initiators to let reviewers know how their suggestions are being implemented. When one or more reviewers reply to a comment, the set of replies is called a thread. In the Comments list, all replies are displayed. Replies are indented below the original comment.

### • Reply in the pop-up note

- 1 Open the pop-up note for the comment.
- 2 Click **Reply**, in the upper right corner of the pop-up note.
- 3 Type your reply in the box that appears.

### • Reply in the Comments list

- 1 Select a comment in the Comments list.
- 2 Type your reply in the box that appears.

### • Reply to a review participant

- 1 Select a comment and use @mention to get the attention of a document reviewer.
- 2 Type your reply in the box that appears.

### • Delete a reply

You can delete your comments in a PDF. However, you cannot delete other reviewers' comments. In the pop-up note, right-click the reply and choose **Delete**.

## Set a status

### For PDFs shared using Adobe Document Cloud

Status is useful for keeping track of comments that you've read, resolved or that require further action. By setting the review status, you can let the review participants know how you are going to handle the comment.

Select the comment in the Comments list and right-click. Alternatively, you can click the Options menu (...) for the selected comment and perform the following actions:

- To mark the comment as resolved, choose **Resolve**.
- To mark the comment as unread, choose **Mark As Unread**.

### For PDFs shared using a network folder

#### Set a status or check mark

In **Windows**, you can use a status or a check mark to indicate which comments you want to export to a Word document. By setting the review status, you can show or hide a group of comments and let review participants know how you are going to handle the comment. Once the review status is set, you cannot remove the review status display from the comment in the Comments list, even if you change the review status to None. Check marks are for your personal use and do not appear when others view the PDF unless you change the status of comments.



- 1 Select the comment in the Comments list and right-click to show the Options menu. Then choose an option from the **Set Status** menu.  
The review status appears in the comment along with the name of who set the review status. If another reviewer sets the review status for that comment, both reviewers' names and review statuses appear in the Comments list.
- 2 To view a comment's history of changes, right-click the note icon, markup, or title bar of a pop-up note, and then choose **Properties**. Click the **Review History** tab.

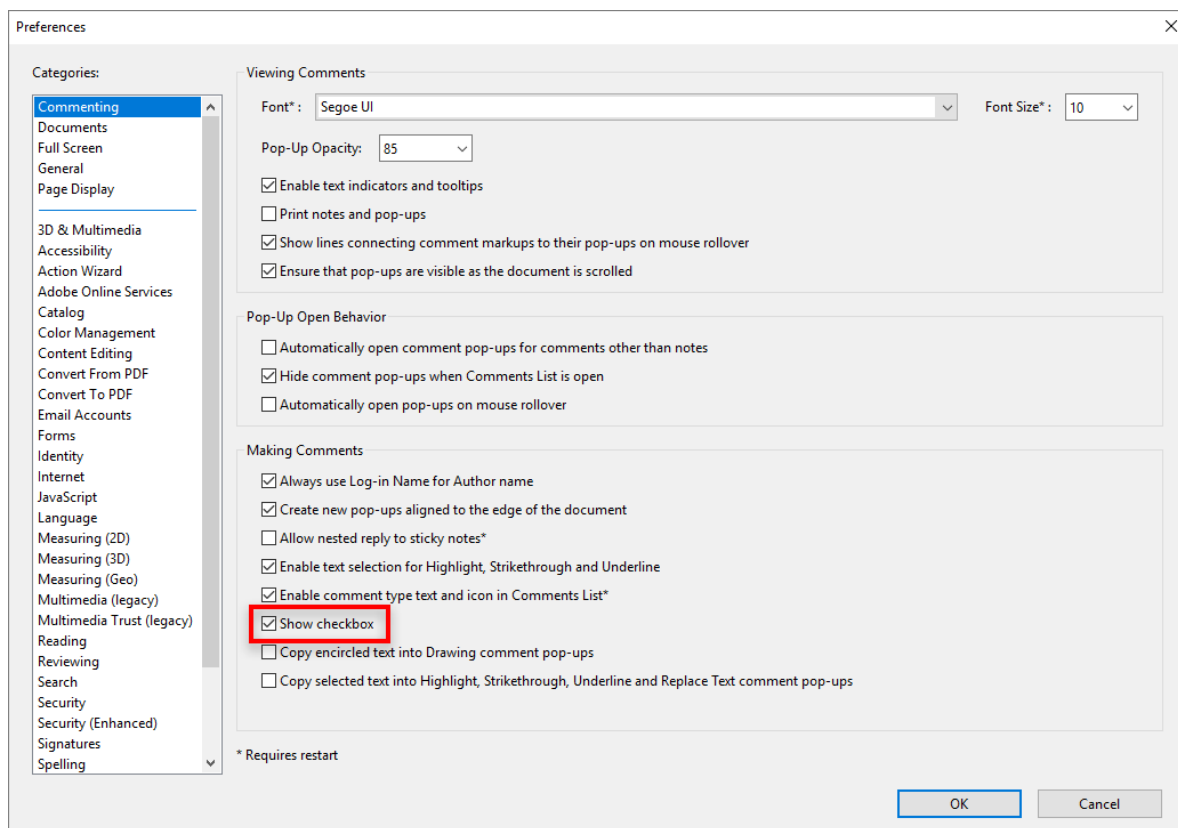
### Flag comments with a check mark

Select a comment in the Comments list. From the Options menu (...), select **Add Checkmark**. You can also right-click the comment and select **Add Checkmark**. A check mark icon appears on the comment.

By default, the checkbox is hidden. If you use checkboxes on multiple documents, Acrobat prompts you to enable the checkboxes for all documents.

To show checkbox for all comments, do the following:

- 1 Go to Edit > Preferences (in Windows), or Acrobat > Preferences (in macOS). The preferences dialog box is displayed.
- 2 In the Commenting category, select **Show Checkbox** under Making Comments.

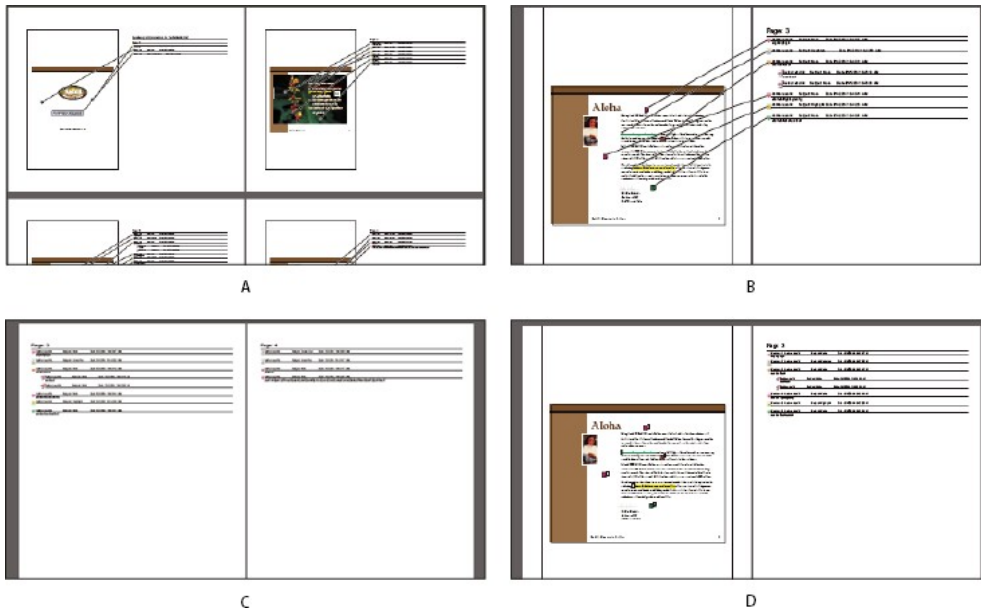


- 3 Click **OK**.

The checkbox is now available for all comments. To add a checkmark, select the checkbox next to the comment.

### Print a comment summary

Summarizing comments is a convenient way to get a synopsis of all the comments associated with a PDF. When you summarize comments, you can either create a PDF with comments that you can print, or you can print the summary directly. The summary is neither associated with nor linked to the PDF that the comments are derived from.



Page layout options for comment summaries

A Document and comments with connector lines on single page B Document and comments with connector lines on separate pages  
C Comments only D Document with sequence numbers

By default, Acrobat prints PDFs with any stamps that were applied. For the greatest control over how comments are printed, choose **>Print With Comments Summary** from the Comments list.

- 1 Filter the comments to show only those you want in the summary. (In the Comments list, click Filter Comments and choose categories of comments you want to show.)

The screenshot shows the 'Filter Comments' dialog box. It has three tabs at the top: 'Unread', 'Resolved', and 'Unresolved'. Below these are three buttons for 'COMMENT BY': 'All Comments', 'Comments I Made', and 'Comments I Received'. Under the 'TYPES' section, there are two buttons: 'Sticky Note' and 'Highlight'. Under the 'COLOR' section, there are three colored circles: blue, red, and yellow. At the bottom, there is a toggle switch labeled 'Hide All Comments'.

- 2 For the greatest control over how comments are printed, choose **>Print With Comments Summary**. Alternatively, to create a separate PDF of the comments, choose **> Create Comment Summary**.
- 3 In the **Create Comment Summary** dialog box, do the following:
  - Choose a layout for the document and comments. The layout determines available options.
  - Choose how to sort the comments.
  - Specify a page range and choose whether to include pages without comments.
  - Select whether you want all comments to appear in the summary or only the comments that currently appear.
- 4 Click **Create Comment Summary**.

## Find a comment

Locate a comment in the Comments list by searching for a particular word or phrase.

- 1 Choose **Tools > Comment** to display the Comments list.
- 2 Click in the Search Comments field, specify the word or phrase you want to search for.

The **Comments list** displays the comments that match the search criteria; the number of comments is displayed on the panel header.

## Delete comments

You cannot delete other reviewers' comments in a shared review, nor can you delete locked comments.

Do one of the following:

- Select the comment and press **Delete**.
- In the Comments list, right-click on the comment you want to delete, choose **Delete** from the context menu.

**Note:** Before pressing the Delete key, make sure that the comment is selected.

## Unlock a comment

Only available for PDFs shared using a network folder

- 1 Right-click the comment and choose **Properties**.
- 2 Deselect **Locked**.

## Spell-check all text in comments

You can spell-check the text you add in note comments and form fields. However, you cannot spell-check the text in the underlying PDF.

- 1 Select the comment. From the options menu, choose **Edit**.
- 2 Right-click the text, and select **Check Spelling**.
- 3 Click **Start**. To change a word, do one of the following:
  - Edit the selected word. To undo your change, click **Undo Edit**. To accept your change, click **Change**.
  - Double-click a suggested correction.
  - Select a suggested correction and then click **Change**. Click **Change All** to replace every instance of the unrecognized word with the suggested correction.

## **Importing and exporting comments**

### Import Comments

In Acrobat Reader, commenting features are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.

Comments can be imported from a PDF document. You can also import comments from a Forms Data Format (FDF) file or an XFDF file, which is an XML-based FDF file. You cannot open and view FDF files or XFDF files on their own.

- 1 In the document that you want to receive comments, from the Options menu in the comments list, choose **Import Data File**.

To open the comments list, choose Tools > Comments.

- 2 Choose All Files (\*.\*) from the file type menu. If you know the file format of the comments you want to import, choose it.
- 3 Double-click the name of the document with the comments.

The comment positioning matches that of the file from which they were imported. If comments appear out of place, the source and recipient PDF documents are likely to be different. For example, if you import comments from a ten- page document to a two-page document, only comments from the first two pages appear.

### Export comments

If you add comments to a PDF that isn't part of a managed review, you may need to export your comments to send them to someone, or you may need to import comments you receive. (PDFs in a managed review workflow include special options that let you send or publish your comments, rather than export them.)

When you export comments, you create a **Forms Data Format** (FDF) file that contains only comments. Consequently, FDF files are usually smaller than PDFs. You or another reviewer can then import the comments from the FDF file into the original PDF.

### Export comments to a data file

- 1 From the options menu in the comments list, choose **Export All To Data File**.
- 2 Name the file and choose **Acrobat FDF Files (\*.fdf)** or **Acrobat XPDF Files (\*.xpdf)** for the file type.
- 3 Specify a location for the file, and then click **Save**.

### Export selected comments

- 1 In the comments list, select the comments you want to export.

To open the comments list, choose tools > Comments.

- 2 From the options menu in the comments list, choose **Export Selected To Data File**.
- 3 Name the file and choose **Acrobat FDF Files (\*.fdf)** or **Acrobat XPDF Files (\*.xpdf)** for the file type.
- 4 Specify a location for the file, and then click **Save**.

### Export comments to Word (Windows)

In some instances, reviewers make comments in a PDF that was created from a **Microsoft Word** document. You can revise the original Word document by exporting these comments from the PDF. For example, text that has been inserted, crossed out, or replaced using the text edit tools in the PDF can be deleted or transferred directly to the source Word document. Formatting added to comments (for example, boldface text) is lost during this process and must be added to the Word document manually.

To revise a Word document using comments, you must create a tagged PDF from the Word document. Before you transfer text edits from the PDF, remove any extra words or information and then merge them to one PDF (if you have comments from multiple reviewers). If you plan to import comments more than once, you may want to make a copy of the Word document before you import the comments or comments may not be imported correctly.

- 1 Do one of the following:
  - From the options menu in the comments list, choose **Export To Word**.
  - In Word, open the source document, and then choose **Acrobat Comments > Import Comments From Acrobat**. For Word 2013, click **Acrobat**, and then choose **Acrobat Comments > Import Comments From Acrobat**.
- 2 Read the instructions, and click **OK**.
- 3 In the **Import Comments From Adobe Acrobat** dialog box, select the PDF and Word files, select from the following options, and click **Continue**:

**Take comments from this PDF file** Browse to the PDF file that contains the comments.

**Place comments in this Word file** Browse to the Word document to which you want to import comments.

**All Comments** Imports all comments.

**All Comments With Checkmarks** Imports only those comments marked with check marks.

**Text Edits Only: Insertions, Deletions, And Replaces** Imports only those comments that you've added using the text edit commands in the Annotations panel.

**Apply Custom Filters To Comments** Imports only comments that you specify by author, type, or status.

**Turn Track Changes On Before Importing Comments** Shows the changes made by the imported comments in Word.

- 4 (Optional) If you imported text edits, click **Integrate Text Edits** in the **Successful Import** dialog box to review and apply each edit individually. For each edit, select one of the following options:

**Apply** Makes the change in the document and deletes the comment bubble. If a comment appears to be empty, you may want to integrate it to see if it's a space or a paragraph return.

**Discard** Rejects the edit and deletes the comment bubble.

**Next** Skips to the next text edit. Text edits that are skipped or not integrated appear as bubbles in the Word document.

**Apply All Remaining** Integrates all remaining text edits and deletes the comment bubbles.

**Undo Last** Undoes the last text edit, including any manual changes.

- 5 Delete comment bubbles that appear in the Word document:
- Right-click the comment bubble and choose **Delete Comment**.
  - Choose **Acrobat Comments > Delete All Comments In Document**. For Word 2013 and later, this option is on the Acrobat ribbon.

## Tracking and managing PDF reviews

### Track reviews for PDFs shared using Adobe Document Cloud

You can track and manage reviews using the following methods:

- **Using the Document Cloud review link**

To view the review comments, follow the steps below:

- 1 Click the review link in your email.
- 2 The review PDF is open in a browser. Sign in with your Adobe ID to join the review and view comments.

- **Using Acrobat DC desktop app Initiator**

When the reviewers add any comment on the PDF, you get a notification in Acrobat. Click the notification icon, and then click the notification message. Acrobat opens the review PDF.

#### **Reviewer**

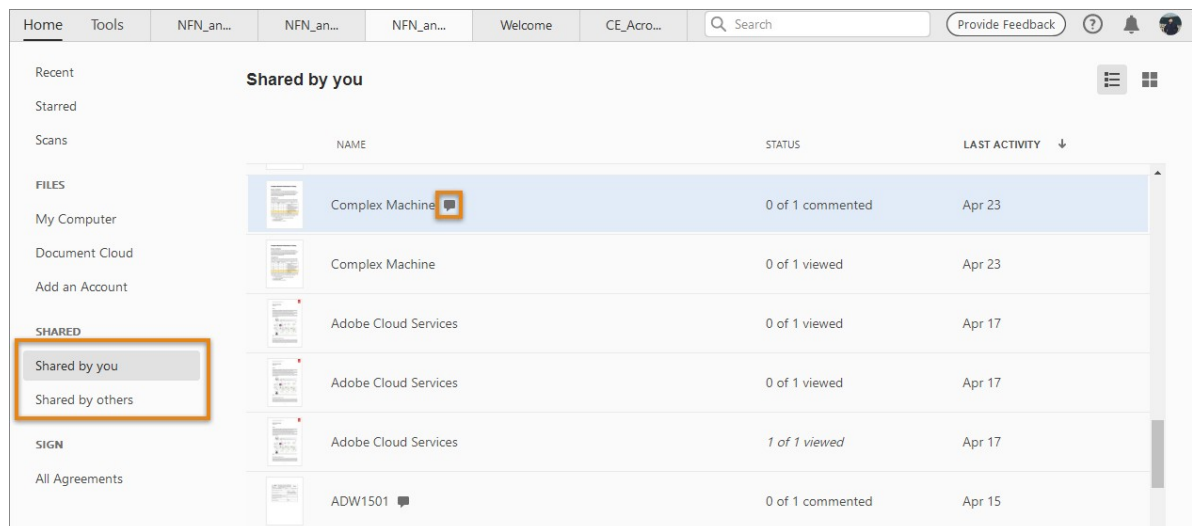
You get a notification in Acrobat. Click **Review**, in the notification message to open the review PDF in Acrobat. The PDFs shared for review with you are also listed in **Acrobat > Home > Recent**. Double-click the PDF to open in Acrobat.

The comment icon next to a shared file's name indicates that it's a review file. If there's no comment icon next to a shared file, then the file has been shared for viewing only.

To view and track all the PDFs shared for review, do the following:

- 1 Click **Home**.
- 2 In the **Shared** section, do one of the following:
  - To view the files sent by you for review, click **Shared By You**.
  - To view the files received for review, click **Shared By Others**.

The comment icon next to a shared file's name indicates that it's a review file.



All the PDFs shared for review are displayed along with the following information:

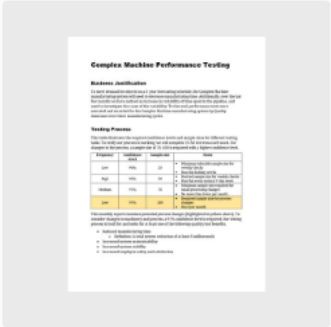
- **Name:** Name of the PDF shared for review
  - **Status:** Shows the number of people who have commented on the file.
  - **Last Activity:** The timestamp of the last activity performed on the PDF.
- 3 To view the details of a PDF, select the PDF. A thumbnail of the PDF is displayed in the right-pane. To view the review status and the list of reviewers, expand the list by clicking the arrow key ( ).

Based on whether you are an initiator or a reviewer, you can perform any of the following actions:

#### Initiator


- View detailed activity on the review file.
- Add more reviewers to the PDF.
- If you have created a personalized invitation, click **Invite Person**, and enter the names of the reviewers you want to add.
- If you have created a public link, click **Copy Shared Link**, and send the link to the recipients in an email.
- To stop sharing the review with others, click **Unshare File**.
- To end review, click **Delete Shared File**. This action removes the review file from the Document Cloud and cannot be undone.







Complex Machine  
REVIEW  
Last Activity Sep 16, 3:01 PM


Please review this document.

2 People 



[Invite Person](#)





**T. Ravi Kumar**  
OWNER • Last accessed Sep 16, 3:01 PM



**Prabhat Singh**  
Last accessed May 13, 12:28 PM


[Copy Shared Link](#)

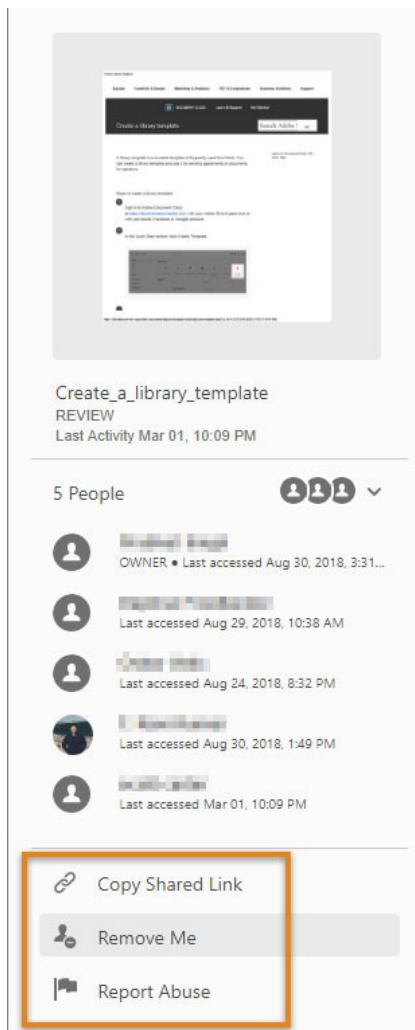

[Unshare File](#)


[Delete Shared File](#)

Initiator options

## Reviewer

- Add more reviewers to the PDF. Click **Copy Shared Link**, and send the link to the recipients in an email.
- If you want to remove yourself from PDF review, click **Remove Me**.
- **Report Abuse** if you feel the content of the PDF is inappropriate or has trademark infringement.



#### Reviewer options

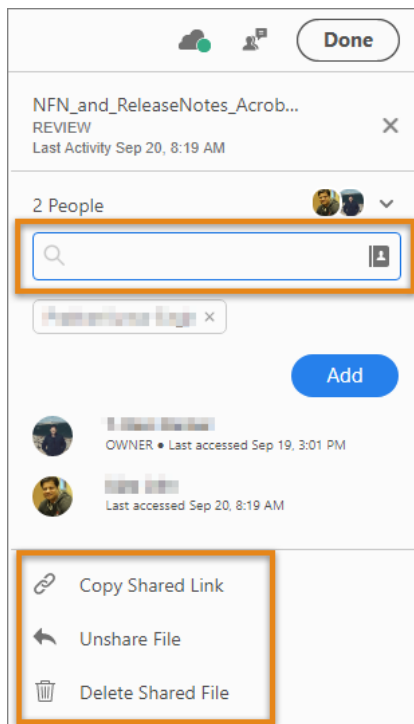
- 4 To view the comments, double-click the file icon. The review PDF opens. The comments list is displayed in the right pane. In the upper-right corner, click the icon to *toggle between viewing comments and managing review*.

Based on whether you are an initiator or a reviewer, you can perform any of the following actions from the **Share**

option:

#### Initiator

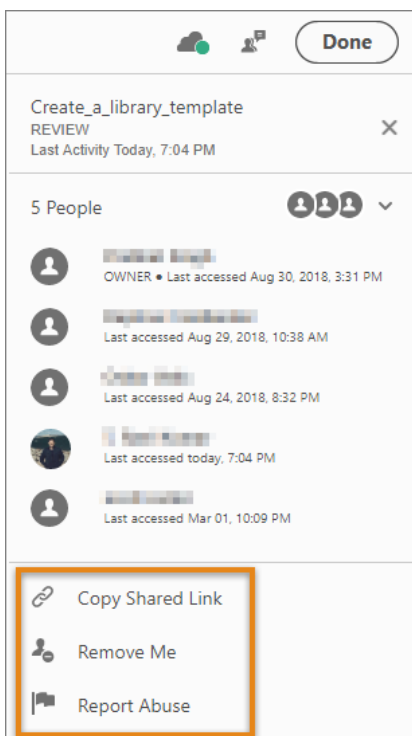
- Add more reviewers to the PDF.
- Click **Invite Person**, and enter the names of the reviewers you want to add.
- You can also **Copy Shared Link**, and send the link to the recipients in an email.
- To stop sharing the review with others, click **Unshare File**.
- To end review, click **Delete Shared File**. This action removes the review file from the Document Cloud and cannot be undone.



Initiator options

## Reviewer

- Add more reviewers to the PDF. Click **Copy Shared Link**, and send the link to the recipients in an email.
- If you want to remove yourself from PDF review, click **Remove Me**.
- **Report Abuse** if you feel the content of the PDF is inappropriate or has trademark infringement.



Reviewer options

## Track reviews for PDFs shared using a network folder

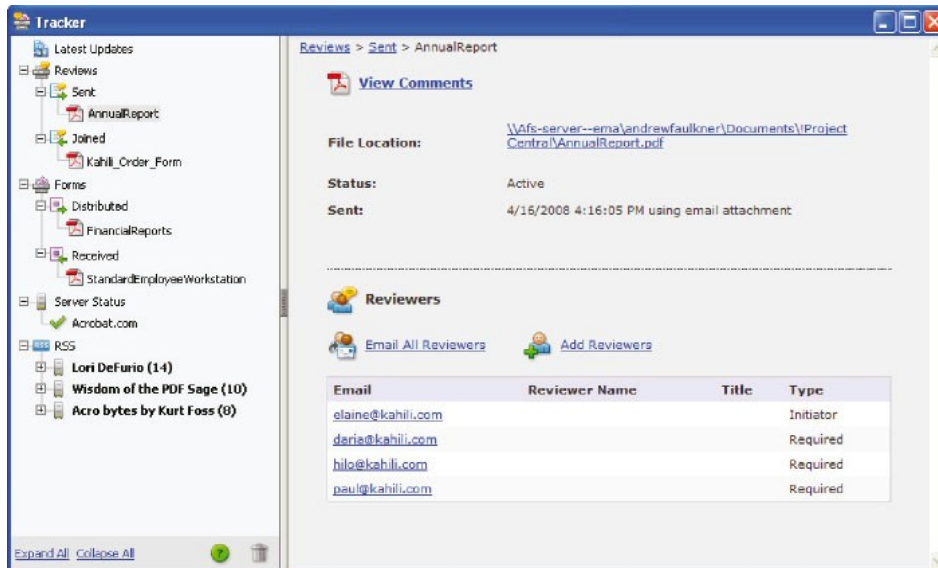
(Acrobat DC only)

To track and manage PDFs shared using a network folder, ensure that you turn off the following preference in Acrobat DC:

- 1 Go to **Edit > Preferences**. The Preferences dialog box is displayed.
- 2 In the left pane, click **Reviewing**. Under the **Shared Review Options** section, deselect the **Share For Review Using The Adobe Document Cloud** check box, and then click **OK**.

- **Tracker overview**

Use the Tracker to manage document reviews and distributed forms, view the status of review and form servers, and manage web broadcast subscriptions (known as RSS feeds). To open the Tracker, choose View > Tracker.



Use the Tracker to manage reviews, forms, and web broadcast subscriptions (RSS feeds). Left panel has links to review files, forms, server status messages, and RSS feeds. Right panel shows details for item selected in left panel.

If the RSS button doesn't appear in Tracker, open the Preferences dialog box in Acrobat and select Tracker. Select Enable RSS Feeds In Tracker, and click OK. Then close and reopen Tracker.

You can use the Tracker to subscribe to web content that uses the RSS (Really **Simple Syndication**) format, such as news feeds and music channels. RSS format is compatible with XML and RDF formats.

The **Server Status** shows the state of all servers being used for reviews and distributed forms. The check mark icon next to the server name indicates that the last synchronization attempt was successful. The warning icon indicates that the last synchronization attempt was unsuccessful. The warning icon indicates that the server is disconnected from the network, has problems writing data to the disk, or has some other problem. Contact your network administrator for assistance.

## RSS

### Server Status

Use Tracker to manage the forms that you have distributed or received. **The Tracker** allows you to view and edit the location of the response file, and track which recipients have responded. You can also add more recipients, email all recipients, and view the responses for a form.

### Forms

**The Tracker** shows who's joined a shared review and how many comments they've published. From the Tracker, you can rejoin a review and email the participants. If you've initiated reviews, you can add or change deadlines, add reviewers, end a review, and start a new review with existing reviewers.

The left side of the Tracker shows all PDF documents in managed reviews. The information pane on the right lists the date and time the PDF was sent and the list of invited reviewers. Links to shared PDFs provide additional information, including the deadline (if set) and the number of comments submitted per reviewer. Deleting a link in the Tracker deletes the PDF and all comments from the server, and permanently ends the review.

## Reviews

The **Latest Updates** panel provides a summary of the latest changes in shared reviews, form files, and servers. If you have no active reviews or forms, this panel provides instructions and links for creating managed reviews, creating forms, and distributing forms. In the **Latest Updates** panel, you can also turn Tracker notifications on or off inside Acrobat and, for Windows only, in the system tray.

### Latest Updates

- **Track reviewed PDFs**

- 1 In the Tracker, expand the appropriate folder:

**Sent** Lists PDFs in reviews that you initiated.

**Joined** Contains PDFs in reviews that you've received. PDFs appear in this list only after you open them. If you open a PDF from an email attachment and don't save the PDF, the entry is removed from the Tracker when you close the file.

PDFs listed in bold contain one or more of the following updates: comments that you haven't read yet, a deadline update from the review initiator, and reviewers who have joined the review.

- 2 Select a PDF.

Information specific to the selected PDF review appears on the right. Shared reviews list deadline information, reviewers who have joined the review, and the number of comments.

### Save the PDF with comments

You can save a copy of the review PDF that contains all the comments that reviewers have published or that you've imported (merged).

If the PDF is in a shared review, you can save an archive copy. The copy is no longer connected to the shared review, and you can edit both content and comments in it.

If you want to create a copy of a shared PDF to distribute to others, use the **Save As** command. The resulting file includes all comments that were published up to that point. It can be moved, copied, or renamed without affecting its connection to the review or to the comment server.

To save a copy of a review PDF with all the comments, open the file, and then do one of the following:

- For a shared review, choose **File > Save As Archive Copy**. Alternatively, click the **Status** button in the document message bar and choose **Save As Archive Copy**.
- For an email-based review, choose **File > Save As** to save a new copy of the PDF. This most recently saved version is now the tracked PDF. The old version is the archive copy.
- **Invite additional reviewers**

If you're the review initiator, you can invite others to participate in the review. If you're a reviewer and want other people to participate, ask the review initiator to invite them. That way, the initiator can automatically track all participants and receive notification when their comments are received.

- 1 In the Tracker, select the PDF under **Sent**, and then click **Add Reviewers** on the right.
- 2 Specify the email addresses of the reviewers whom you want to add. Change the message as needed and then send the message.

Additional reviewers appear with other participants in the right pane of the Tracker.

- **Add or change a deadline**

A review initiator can add or change a deadline in an existing review.

- 1 In the Tracker, select the PDF, and do one of the following:
  - If the review has no deadline, click **Add Deadline**.
  - If the review has a deadline, click **Change Deadline**.
- 2 Click **Review Deadline**, change the deadline as needed, and click **OK**.
- 3 Change the email recipients, subject, and message as needed, and then click **Send**.

- **End a review**

A review initiator can end an existing review. Once a review has ended, participants cannot publish comments to the server. You can change the review deadline later if you want to restart the review.

In the Tracker, select the PDF and click **End Review**.

- **Start a shared review with the same reviewers from an existing review**

- 1 In the Tracker, select a PDF and click **Start New Review With Same Reviewers**.
- 2 Follow the steps for starting a shared review.

- **Send a message**

Sometimes during a review, you want to contact other reviewers or send them a reminder of their approaching deadline.

- 1 In the Tracker, select the PDF and click **Email All Reviewers**.
- 2 In the email message, change the **To** and **Subject** boxes or the body of the email message as needed, and then click **Send**.

- **Update your profile**

Your comments identify you as the author by displaying your name—the name you provided when you joined or started a review, or your system login. You can change the author name and other profile information at any time. If you do, your updated profile appears only in new comments; existing comments aren't affected.

#### **Update your review profile**

- 1 In the Preferences dialog box (**Edit > Preferences**) under Categories, select **Commenting**.
- 2 Deselect **Always Use Log-In Name For Author Name**.
- 3 Select **Identity** from the list on the left.
- 4 Edit your profile, making sure to include the email address that you'll use for reviews. Click **OK**. **Update your profile for a shared review**

- 1 In the Preferences dialog box under Categories, select **Identity**.
- 2 Edit your profile, making sure to include a valid email address, and click **OK**.

- **Tracker preferences**

To specify settings for Tracker, in the Preferences dialog box under Categories, select **Tracker**.

**Automatically Check For New Comments And Form Data** Specifies how often comments are synchronized. To disable automatic synchronization, move the slider to the far right until the value **Never** appears.

**Suspend The Check For New Comments And Form Data** Specifies how long after review or form inactivity to stop checking for comments or new form data.

**Remove Custom Server Locations** To remove a server profile, select it from the list and click **Remove Server Profile**.

**Notifications** Specifies where Tracker notifications appear.

**Enable RSS Feeds In Tracker** When this option is selected, an RSS category appears on the left side of the Tracker. You can subscribe to RSS feeds from within the Tracker.

**Clear All Stored Credentials** Click to remove all stored credentials used for shared reviews.

## **Adobe Document Cloud for Outlook**

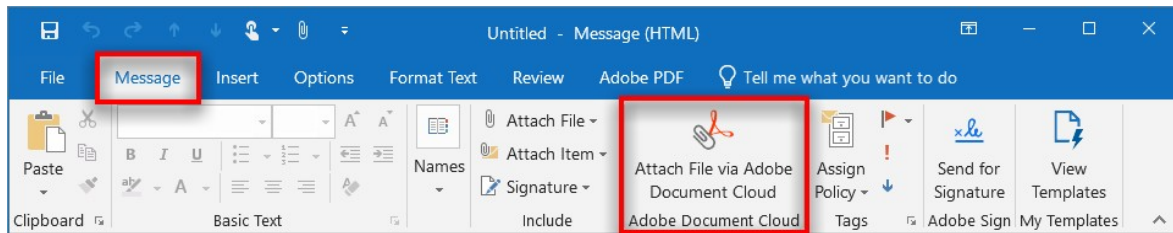
You can use Adobe Document Cloud plug-in for Outlook to send large files as public links through Outlook. The attached files are uploaded to Adobe Document Cloud, and public links to the files are inserted in the email body.

Recipients can click the link to preview the file in a browser window and can download the file if needed.



## Attach files via Adobe Document Cloud

- 1 In the new message window, click **Message**.
- 2 In the **Adobe Document Cloud** group, click **Attach File via Adobe Document Cloud**.



The plug-in does not work if you have RTF set as the default formatting for email messages. To use the plug-in, switch to HTML formatting.

- 3 Browse and select the files that you want to attach, and then click **Open**.

Alternatively, you can drag files from folders on your computer and drop them on the message window. A prompt appears on the right side of the attachment input box asking whether you want to send files as Adobe Document Cloud link. Click **Yes**.



- 4 If you're not signed in, you see a prompt. Click **OK**. Open Acrobat, click the **Sign In** link at the upper-right corner and then sign in with your Adobe ID and password.
- 5 The selected files are uploaded to Adobe Document Cloud, and public links to the files are inserted in the message body.



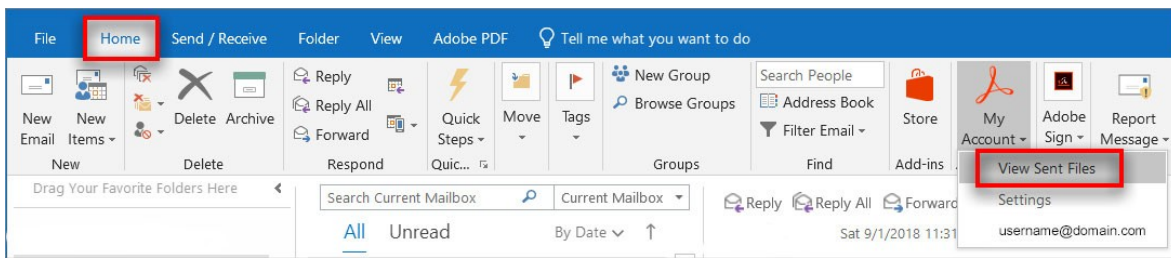
You can modify the text shown in black to be anything you want, and move the text into another part of your email.

**Be careful not to modify the link.**

## View sent files

All your sent files are stored securely in Adobe Document Cloud. You can view the files anytime.

- 1 In the main Outlook window, click **My Account** in the Adobe Document Cloud group and then choose **View Sent Files**.

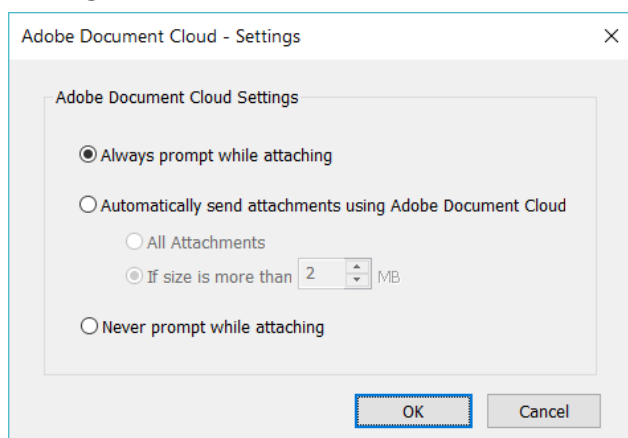


- 2 Sign in with your Adobe ID and password. All your sent files appear in a browser window.

### Adobe Document Cloud settings

By default, you see prompt for all attachments. However, you can decide whether you want to see the prompt. You can also choose to automatically send files based on a particular size limit.

- 1 In the main Outlook window, click **My Account** in the Adobe Document Cloud group and then choose **Settings**.



- 2 Choose an appropriate option, specify values if required, and then click **OK**.

### Advantages of attaching files via Adobe Document Cloud for Outlook

- Access to your address book and complete control over the email format and content.
- Send catalogs, brochures, and other large files — even audio/video.
- Preview files in a browser (except audio/video) or download to look at later.

### Supported Outlook versions

- Outlook for Windows 2010, 2013, and 2016: The plug-in is automatically added to your Outlook when you install Acrobat DC on your computer.

### **Share and track PDFs online | New experience**

You can quickly share a link to a PDF document with others for viewing or commenting. The document shared as a link opens in any browser, on any device. The document is stored securely in Adobe Document Cloud.

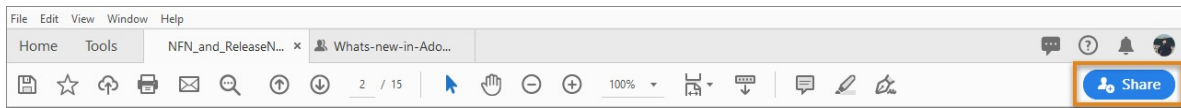
Recipients get an email with a link, and they can click the link to view and comment on the document in a browser; no sign-in required.

Adobe is testing the new PDF sharing experience in Acrobat DC. After updating to the latest release, you see one of the following new experiences for sharing PDFs:

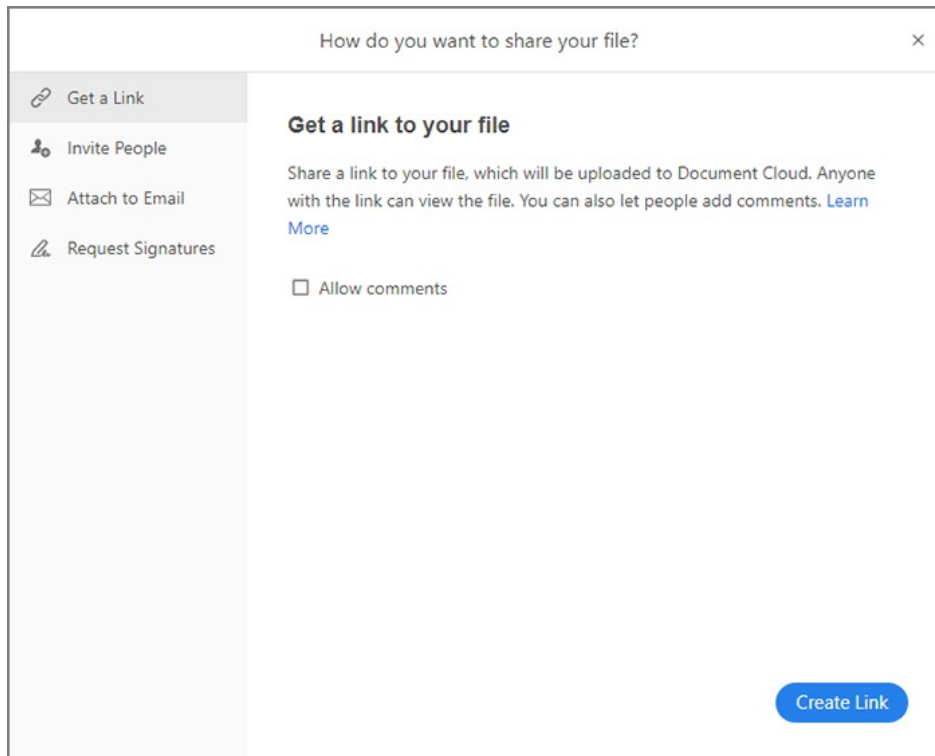
- Experience 1: Share PDFs using the Share modal dialog box.
- Experience 2: Share PDFs using the simplified 1-click access to the sharing tools.

## Experience 1: Share PDFs using the share modal dialog box

- 1 Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat DC. Alternatively, choose **Tools > Share**, and then browse and select the PDF.



The share dialog box is displayed.



- 2 Share the file using any one of the following methods:

- **Share an anonymous or public link**

An anonymous or public link makes the files accessible to anyone who clicks the link. Also, the detailed tracking information is not available for files shared using public links.

- 1 Click **Get a Link**.
- 2 (Optional) If you want to share the file for review, select the **Allow Comments** check box.
- 3 Click **Create Link**. The selected files are uploaded to the Adobe Document Cloud and a public link is created.
- 4 Click **Copy Link**, and close the Share window.
- 5 Share the link with the recipients.

- **Send personalized invitations using Adobe Document Cloud share option**

The detailed tracking information is available for files shared using a personalized link to individuals. You can share files for view or review using this option.

- 1 Click **Invite People**.
- 2 In the **Invite People By Email** section, enter or choose the email address of whoever you'd like to receive the file. You can also use the **Address Book** link to choose email addresses. Each recipient gets a personalized link to the file.
- 3 The Subject and Message fields are just like the ones you use for sending an email and appear to your recipients in the same way. Enter the desired information.
- 4 (Optional) Select **Allow Comments** if you want to share the file for review.

5 Click **Send**. Your recipients get an email notifying them that the file is shared with them.

- **Attach to an email**

The detailed tracking information is not available for files shared as attachments.

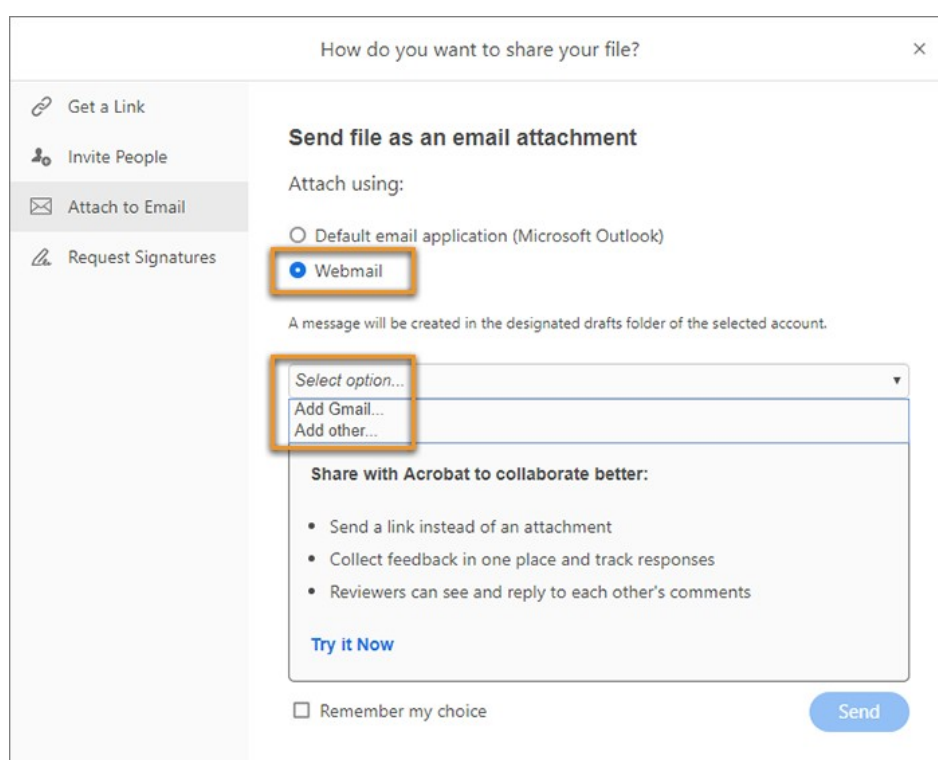
1 Click **Attach to Email**.

2 In the **Send File As An Email Attachment** section, do one of the following:

- Choose **Default Email Application (Microsoft Outlook)**, and click **Send**.
- Choose **Webmail**. In the **Select Option** drop-down list, choose one of the following:

- **Add Gmail:** Enter your email address, and click **OK**. Enter the password, and grant permissions when prompted. Click **Send**.
- **Add other:** Enter your email address, password, and IMAP/SMTP mail server settings. Click **Add** and then click

**Send.**



3 An email draft is displayed with the file attached. Enter the email addresses of the recipients, add an appropriate message in the subject and body of the email, and then send the email.

- **Share PDF to get signatures from others**

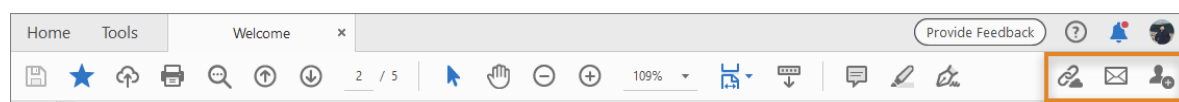
Do the following to request signatures from others for your PDF.

1 Click **Request Signatures**, and then click **Get Started**.

2 The Add Signers window is displayed. Specify the recipient email address, and then click **Specify Where To Sign**. For more information, see [Get documents signed by others](#).

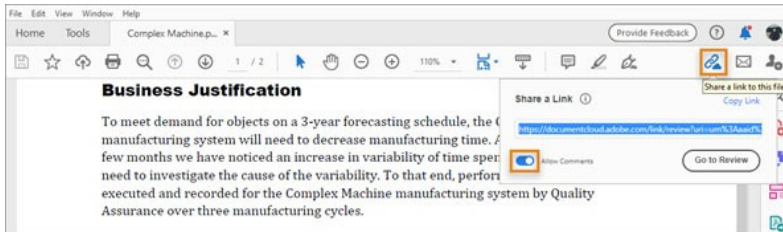
## Experience 2: Share PDFs using the simplified 1-click access to sharing tools

In the top-right corner of the toolbar, there are three icons using which you can share the PDF files.



- **Share a link to the file**

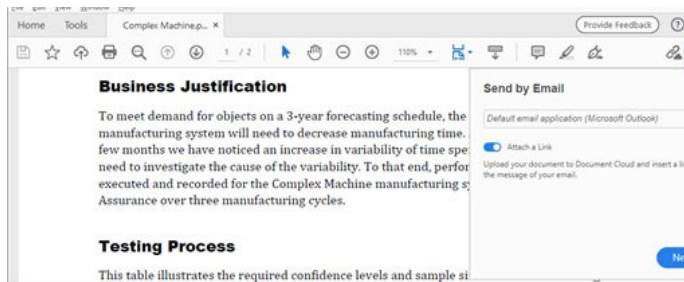
- 1 Open the PDF in Acrobat DC.
- 2 Click the Share a link icon ( ). The shared link is generated instantly; you won't have to wait for the file to be uploaded to the cloud. If you want to share the file for review, click the **Allow Comments** switch to turn it on. To share the file only for viewing, click the switch to turn it off.



- 3 Click **Copy Link** and share the link with the recipients.

- **Send by email**

- 1 Open the PDF in Acrobat DC.
- 2 Click the **Send by Email** icon ( ).



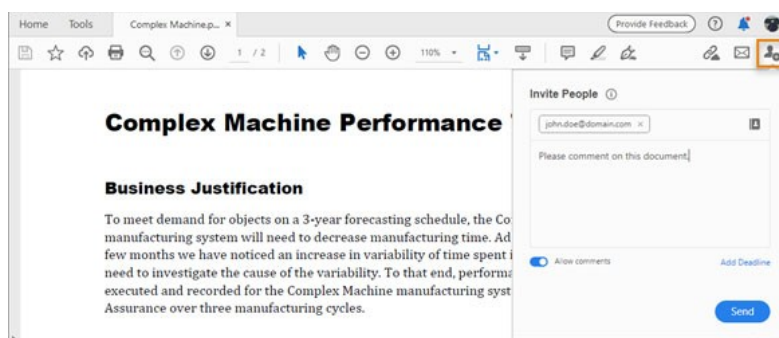
- 3 In the Send by Email dialog, do one of the following:
  - Choose Outlook if it is your default email application.
  - Select **Webmail** in the drop-down list and then select **Add Gmail**. Enter your email address and click **OK**. Enter the password when prompted.
  - Select **Add Other** email address you use. Enter the email address, password, IMAP, SMTP settings in the Add Webmail Account dialog and click **Add**.

The **Attach a Link** switch is turned on by default; a shared view-only link to the PDF will be added in the email body. If you want to attach the PDF instead of the link, click the switch to turn it off.

- 4 Click **Next**. Enter the recipient's email address and send.

- **Invite people for viewing or commenting**

- 1 Open the PDF in Acrobat DC.
- 2 Click the **Invite People** icon ( ).

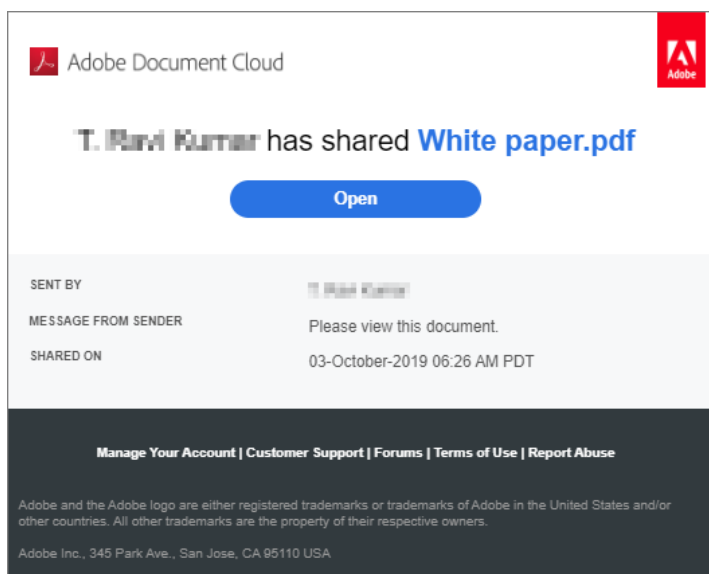


- 3 Enter the email addresses of the recipients or choose from the Address Book. The **Allow Comments** switch is turned on by default. If you want to share the file only for viewing, click the switch to turn it off.
- 4 (Optional) Enter a message to the recipients.
- 5 (Optional) Add Deadline and Reminder for the recipients if required. Select the date and time, and click **Done**.
- 6 Click **Send**. The link is sent to the recipients instantly; you won't have to wait for the file to be uploaded to the cloud.

### Recipients experience

Recipients get an email notifying them that the file is shared with them. The email contains the **Open** file button and a link to the shared document. Clicking the link or the button opens the document in a browser. Recipients can also download the document if necessary.

See the example screenshot below showing the email notification received by a recipient.



*The email notification with a link to the shared document*

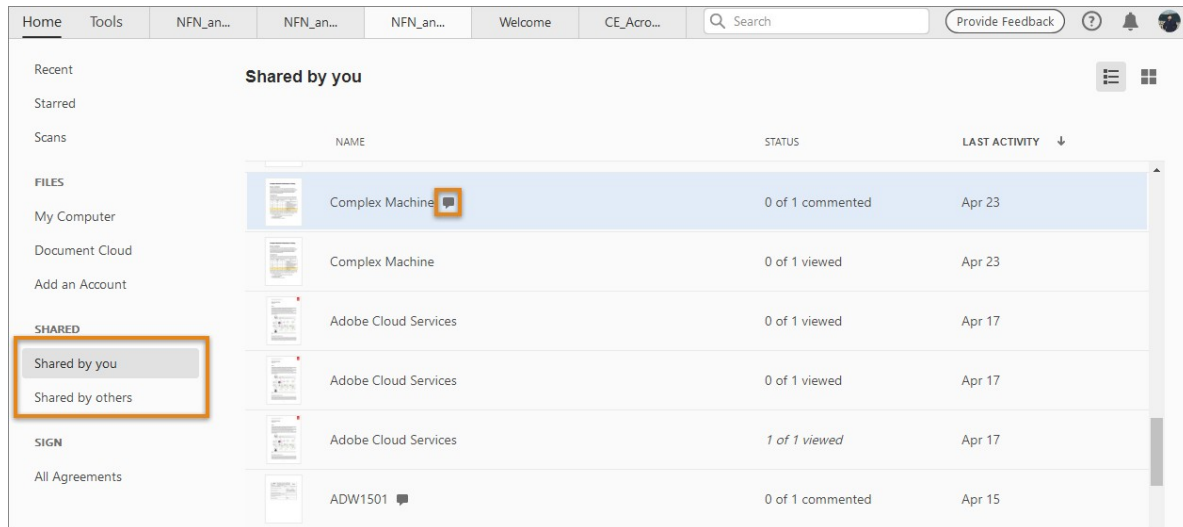
### Track shared files

The files that you have recently shared are listed in **Home > Recent**. When the recipient views the file, you get a notification in Acrobat and an email. To view and track all the files shared for viewing or reviewing, do the following:

- 1 In the **Shared** section, do one of the following:
  - To view the files sent by you for viewing or reviewing, click **Shared By You**.
  - To view the files received for viewing or reviewing, click **Shared By Others**. The comment icon next to a shared file's name indicates that it's a review file.



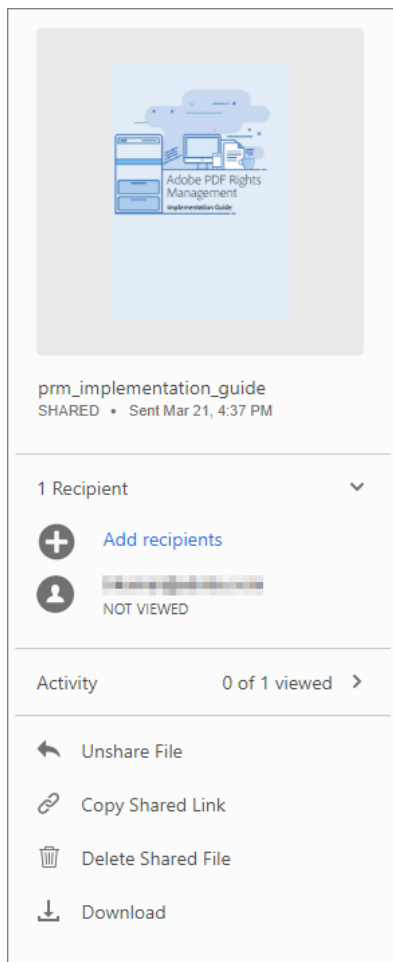
All the PDFs shared for review are displayed along with the following information:



- **Name:** Name of the PDF shared for review
  - **Status:** Shows the number of people who have commented on the file.
  - **Last Activity:** The timestamp of the last activity performed on the PDF.
- 2 To view the details of a file, select the file. A thumbnail of the file is displayed in the right pane. The action board in the right pane displays the actions you can perform on the file. The displayed actions vary based on whether you have shared the file, or received the file for viewing as shown below:

#### Actions on files shared

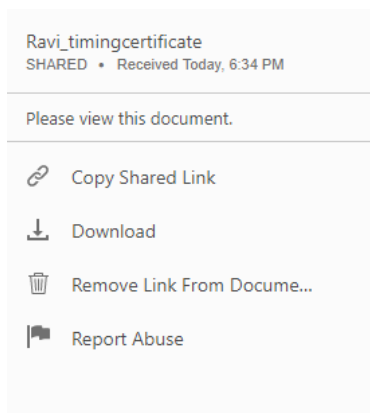
- View the activity and timestamp on the shared file. Expand **Activity** to view the details like Created By, Sent To, Viewed By and Downloaded By the recipients.
- **Unshare File** if you would like to prevent anyone else from viewing or downloading the file.
- **Copy Shared Link** and share with other recipients for viewing.
- **Delete Shared File** to remove the file permanently from the Adobe Document Cloud.
- **Download** the file to your device.



*Actions on files shared for viewing*

### Actions on files received

- View the timestamp of the file received.
- **Copy Shared Link** to either share it with other recipients or open the file on browser.
- **Download** the file to your device.
- **Remove Link From Document Cloud** to remove the file permanently.
- **Report Abuse** for any inappropriate content received.



*Actions for files received for viewing*

## Starting a PDF review | New experience

Automatically collect everyone's comments in a single PDF file. Track progress and consolidate comments.

### Share a PDF for review using the Adobe Document Cloud review service

Use the Adobe Document Cloud review service to easily share PDF files for review from Acrobat DC desktop application, the Document Cloud web, or Acrobat Reader mobile app. When reviewers click the URL in the email invitation from their computer, they can easily provide their feedback in a browser without having to sign in or install any additional software.

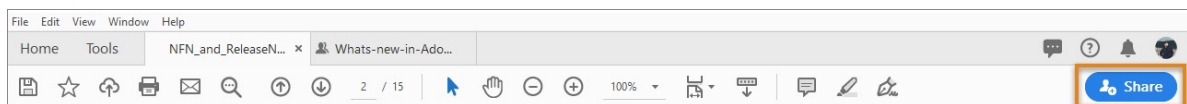
Adobe is testing the new PDF sharing experience in Acrobat DC. After updating to the latest release, you see one of the following new experiences for sharing PDFs:

- Experience 1: Share for review using the share modal dialog box.
- Experience 2: Share for review using the simplified 1-click access to the sharing tools.

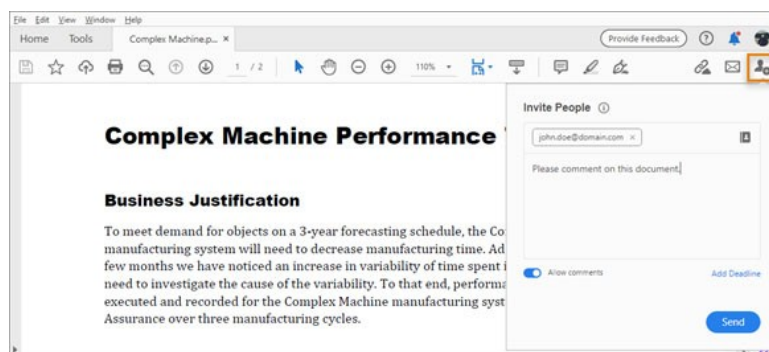
#### Experience 1: Share for review using the share modal dialog box

##### • Send personalized invitations using the Document Cloud Share option

- 1 Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat. Alternatively, choose **Tools > Share**, and then browse and select the PDF. The share window is displayed.



- The computer must be connected to the Internet to start a shared review in Acrobat.
- You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose **Acrobat > Create And Send For Review**.
- 2 Click **Invite People**. In the **Invite People By Email** section, enter or choose the email address of whoever you'd like to review the file. You can also use the **Address Book** link to choose email addresses.
- 3 The **Name** and **Message** fields are just like the ones you use for sending an email and appear to your recipients in the same way. Enter the desired information.
- 4 Select **Allow Comments**. If you want to set the review deadline, click **Add Deadline**. Specify the time, select the date, and click **Done**. To set the reminder for the invitees, click **Add Reminder**. Specify the time, select the date, and click **Done**.



- 5 Click **Send**.

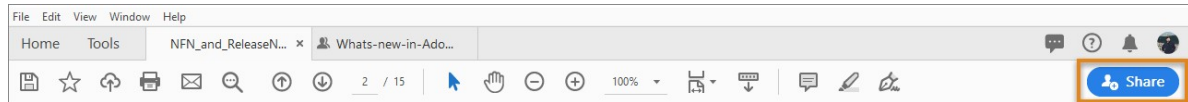
#### Reviewer experience

The reviewers receive an email invitation with a link to the review PDF. When they click the link or the **Review** button in the invitation, the PDF opens in a web browser. They can use the commenting tools to add comments to the PDF. They can also use Acrobat Reader DC or Acrobat DC desktop applications to add comments.

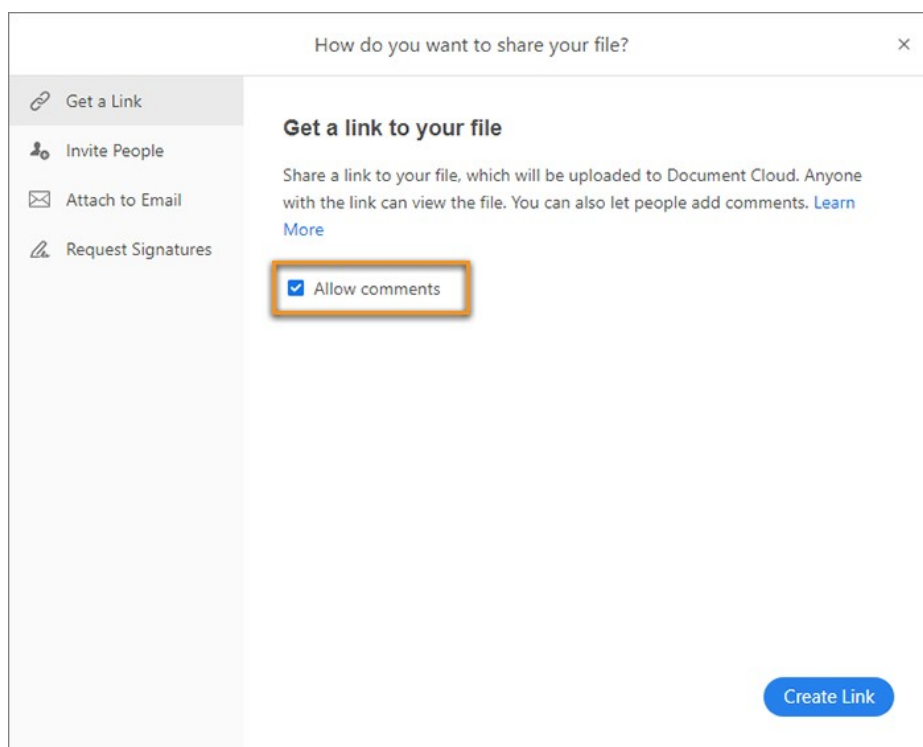
- **Send an anonymous or public link in an email**

An anonymous or public link makes the files accessible to anyone who clicks the link. Follow the steps below to create a review link, and share it using your email client.

- 1 Click the **Share** button in the upper-right corner when a PDF document is open in Acrobat. Alternatively, choose **Tools > Share**, and then browse and select the PDF. The share window is displayed.



- The computer must be connected to the Internet to start a shared review in Acrobat.
  - You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose **Acrobat > Create And Send For Review**.
- 2 Click **Get a Link**.
  - 3 In the **Get A Link To Your File** section, select **Allow Comments**, and click **Create Link**. The selected file is uploaded to the Document Cloud, and a public link is created.



You cannot set a deadline or reminder when you create a public link and share the file for review.

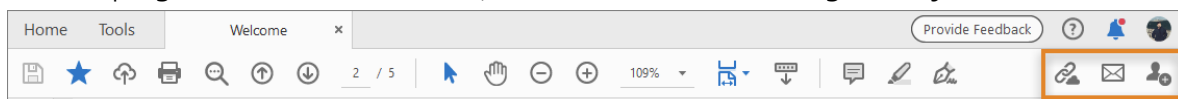
- 4 To copy the review link, click **Copy Link**. Share the review link with the reviewers in an email.

### **Reviewer experience**

The reviewers receive an email invitation with a link to the review PDF. When they click the link or the **Review** button in the invitation, the PDF opens in a web browser. They can use the commenting tools to add comments to the PDF. They can also use Acrobat Reader DC or Acrobat DC desktop applications to add comments.

### **Experience 2: Share for review using the simplified 1-click access to the sharing tools**

In the top-right corner of the toolbar, there are three icons using which you can share the PDF files.

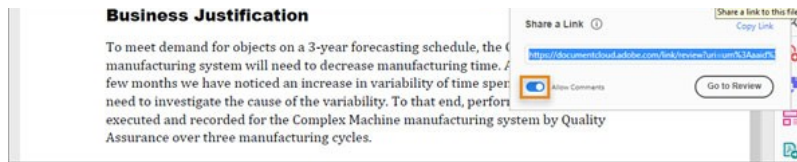


- **Share a link to the file**

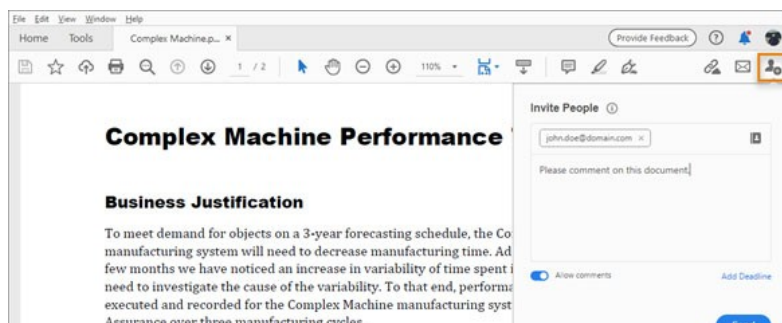
- 1 Open the PDF in Acrobat DC.



- 2 Click the **Share a link** icon. The shared link is generated instantly; you won't have to wait for the file to be uploaded to the cloud. If you want to share the file for review, click the **Allow Comments** switch to turn it on.



- 3 Click **Copy Link** and share the link with the recipients.
- **Invite people for viewing or commenting**
    - 1 Open the PDF in Acrobat DC.
    - 2 Click the **Invite People** icon ( ).



- 3 Enter the email addresses of the recipients or choose from the Address Book. The **Allow Comments** switch is turned on by default. If you want to share the file only for viewing, click the switch to turn it off.
- 4 (Optional) Enter a message to the recipients.
- 5 (Optional) Add Deadline and Reminder for the recipients if required. Select the date and time, and click **Done**.
- 6 Click **Send**. The link is sent to the recipients instantly; you won't have to wait for the file to be uploaded to the cloud.

### Share a PDF for review by hosting it on Sharepoint, WebDAV server, or a network folder

- **Steps to send a PDF for review**
  - 1 If you're using Acrobat 2017 or Acrobat DC 2015 (Classic), skip to the next step. If you're using Acrobat DC, do the following before you initiate the review:
    - a Go to **Edit > Preferences**. The Preferences dialog box is displayed.
    - b In the left pane, click **Reviewing**. Under the **Shared Review Options** section, deselect the **Share For Review Using Adobe Document Cloud** check box, and then click **OK**.
  - 2 Choose **Tools > Send For Review**. The Send for Comments toolset is displayed in the secondary toolbar.
 

You can also start a shared review directly from other applications that use PDFMaker, such as Microsoft Word. Choose Adobe PDF > Convert To Adobe PDF And Send For Shared Commenting. For Office 2010 applications, choose Acrobat > Create And Send For Shared Commenting.
  - 3 In the secondary toolbar, click **Send For Shared Commenting**.
 

If prompted, select a PDF file that you want to send for shared review.
  - 4 Select the way you want to collect comments from your reviewer and click **Next**.

- 5 Select how you would like to host the shared review file and specify the location.
  - **Network folders:** If all recipients are within a local area network, network folders and SharePoint servers are the best choices for a comment server. Network folders are generally the cheapest and most reliable.
  - **SharePoint/Office 365 subsites:** If your recipients work behind a firewall and all have access to a common server, you can use your own internal server location, such as a Microsoft SharePoint site.
  - **WebDAV servers:** WebDAV servers (web servers that use the WebDAV protocol) are best used only if your reviewers are outside a firewall or a local area network.
- 6 Choose a delivery and collection method. Click **Next**.
- 7 Enter a new profile name and click **Next**, or click **Next** to use the default.
- 8 On the email screen, specify the following settings as needed:

**Delivery Method** Click to specify a different delivery and collection method from the one that is currently selected.

**To, Cc** Enter the email addresses of your reviewers. Insert a semicolon or a return after each address. Click the

**To** or **Cc** button to select email addresses from your email application address book.

**Subject, Message** Preview and edit the email subject and message as needed. Acrobat saves any changes you make and displays them the next time you send a document for review. To use the default email message, click **Reset Default Message**.

**Review Deadline** Click to specify a different date or no deadline. After the review deadline expires, reviewers cannot publish comments.

If the review deadline expires while a reviewer has the document open in Acrobat, then the reviewer can publish comments before closing the document.

- 9 Click **Send**.

The shared PDF that you send includes the **Annotation** and **Drawing Markups** panels, and instructions in the document message bar.

Acrobat creates a copy of the shared review file, named *[original filename]review.pdf*, in the same folder as the original file you specified for the review.

### Start an email-based review

When you start an email-based review, you send out a tracked copy of the PDF, enabling you to easily merge comments that you receive. (Form fields in a PDF aren't fillable during the review.) After initiating a shared review, you can also start an email-based review with the same PDF.

Before you start an email-based review, make sure that your email application or webmail account is configured to work with Acrobat.

#### • **Steps to start an email-based review**

- 1 If you're using Acrobat 2017 or Acrobat DC 2015 (Classic), skip to the next step. If you're using Acrobat DC, do the following before you initiate the review:
  - a Go to **Edit > Preferences**. The Preferences dialog box is displayed.
  - b In the left pane, click **Reviewing**. Under the **Shared Review Options** section, deselect the **Share For Review Using The Adobe Document Cloud** check box, and then click **OK**.
- 2 Choose **Tool > Send For Review**.  
The Send for Comments toolset is displayed in the secondary toolbar.
- 3 Click **Send For Comments By Email**.
- 4 If prompted, enter information in the **Identity Setup** dialog box.
- 5 Specify a PDF if it isn't already open, and then click **Next**. The PDF that you specify becomes the master file. Merge the comments you receive from reviewers into this file.



- 6 Specify reviewers by typing their email addresses. Insert a semicolon or a return between each address. Click

**Address Book** to select email addresses from your email application or webmail address book.

- 7 Preview and edit the email invitation as needed, and then click **Send Invitation**.

- 8 Select an email client to send the invite and click **Continue**.

A copy of the PDF is sent to the reviewers as an attachment. When this PDF attachment is opened, it presents commenting tools and instructions.

- **Steps to merge comments**

After you receive comments from reviewers, you can merge the comments into the master PDF.

- 1 After a reviewer sends you comments, open the attached file in your email application. If the email application can't find the original version of the PDF, it prompts you to browse for it.

It's possible to forward comments to the initiator if you didn't initiate the review. First merge these comments into your copy of the PDF. Then send the comment. If you've sent your comments already, the initiator receives only new comments. Merged comments retain the original author name.

- 2 If you initiated the review, the **Merge Comments** dialog box appears. Select one of the following options:

**Yes** Opens the master copy of the PDF and merges all comments into it. After comments are merged, save the master PDF.

**No, Open This Copy Only** Opens the reviewer's copy of the PDF with comments. If you select this option, you can still merge comments by choosing **Comments > Merge Comments Onto Master PDF**.

**Cancel** Closes the reviewer's PDF that contains comments.

Your recipients get an email notifying them that the file is shared with them for review. Each recipient will receive a unique link. Anyone with access to the link can join as a reviewer.