

Using Acrobat Commenting and Markup tools

When collaborating with other faculty or students, there will be times when your PDF documents are created, reviewed, or edited as a team. This type of collaboration requires the ability to track review peer comments and document editing with detailed records and precision. This will allow for more effective communication and document version control.

In Adobe Acrobat X and Adobe Reader, a *comment* is a note, highlight, stamp, or any other markup you add to your PDF document by using the annotation and markup tools in the Comment pane. These tools allow you to insert detailed comments, highlight, replace, insert, and delete text, mark a document with a customized stamp, and use graphics to mark up documents.

Comment pane

The Comment pane (**Figure 1**) includes the Annotations, Drawing Markup, Review, and Comments List panels. It provides easy access to the tools you need to review, annotate and mark up a PDF document.

- The annotation tools include tools for adding sticky notes, highlighting text, attaching other documents, and inserting audio commentary. You can use the text annotation tools for text editing, including insertions and deletions, strikethrough, underlines, and leaving notes for the author or other reviewers.
- Use the drawing markup tools to add text boxes, callouts with leader lines, or graphic shapes and drawings.
- The Review panel offers quick access to tools and services for shared review, including review by email, adding a shared review to Acrobat.com, collaborating live on Acrobat.com, and managing shared reviews with the Acrobat Tracker.
- The Comments List panel shows a summary of every annotation and markup in the document. Using the Comments List panel, you can quickly sort, filter, and locate comments by type, reviewer, date, or status.

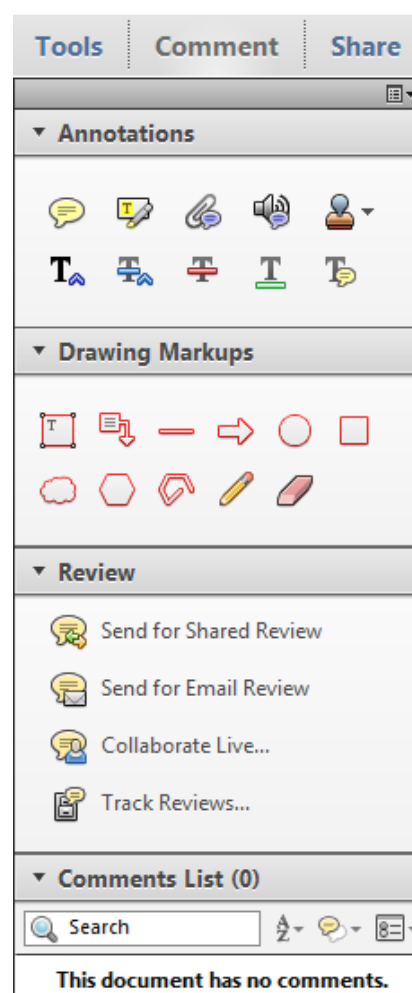


Figure 1 Comments pane

Annotation tools

Provide specific markup on sections of text by using the text-editing tools. The annotation tools (**Figure 2**) allow you to highlight, insert, underline, or cross out text digitally, much as you would edit on paper. Standard editing symbols correspond to the use of each tool so anyone reading your edits can quickly determine your intent.

Pop-up notes associated with the tools show the date and time of the edit and provide room for your comments. They can be minimized to avoid unnecessary clutter.

Add Sticky Note  Add a sticky note anywhere in the document.

Highlight Text  Cause text to be highlighted yellow.

Attach File  Attach a file to the document for reference.

Record Audio  Record audio commentary.

Add Stamp  Stamp a document with a graphic that shows when you received the document and when you completed your review.

Insert Text At Cursor  Mark a spot where text needs to be inserted and include the text to be inserted.

Replace  Show places where text should be replaced and provide alternate text in a pop-up note.

Strikethrough  Cross out the selected text.

Underline  Underline to denote emphasis on a specific piece of text.

Add Note To Text  Include a specific comment that is linked to highlighted text by a pop-up note

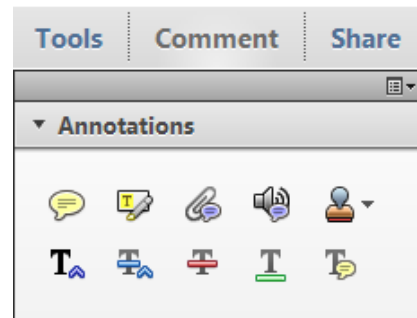


Figure 2 Annotation tools

Using sticky notes to provide feedback

Insert comments at specific locations by using the sticky note tool. Sticky notes are ideal for long or short comments that are general or overarching in their nature.

To add a sticky note comment:

1. Start Acrobat and open the document to review.
2. Open the Comment pane and expand the Annotations panel.
3. Select the Sticky Note tool (**Figure 3**), and click where you want to place the note.
4. Type text in the pop-up note (**Figure 4**). You can also copy and paste text into the note.

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

5. You can reposition the sticky note icon by dragging it to a new location.

The comment is added to the Comments List on the right (**Figure 5**).

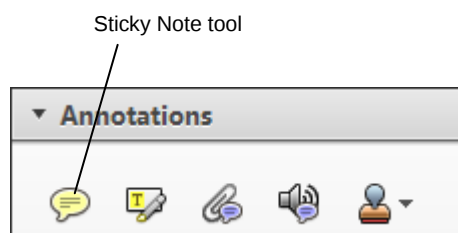


Figure 3 Stick Note tool

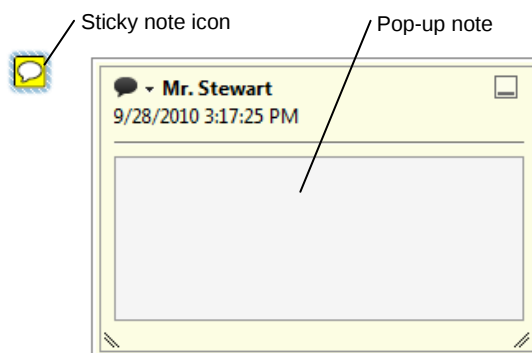


Figure 4 Sticky note

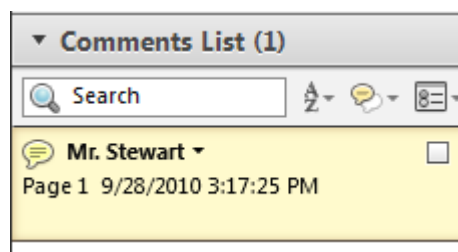


Figure 5 Comments List

To edit a sticky note comment:

1. Double-click the sticky note icon.
2. Make changes, as needed:
 - To resize the pop-up note, drag the lower-left or lower-right corner (**Figure 6**).
 - To add bold, italic or underline style, select the text in the note, and then right-click the text, click Text Style, and choose a style from the menu.
3. When you finish, click the minimize button in the upper-right corner of the pop-up note, or click outside the pop-up note.
 - If you want to change the font size, default pop-up behavior, and other settings for creating and viewing comments, use the Commenting panel in the Preferences dialog box (**Figure 7**).
 - To display Commenting preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select the Commenting category.

Note: The Commenting panel isn't available in Reader.

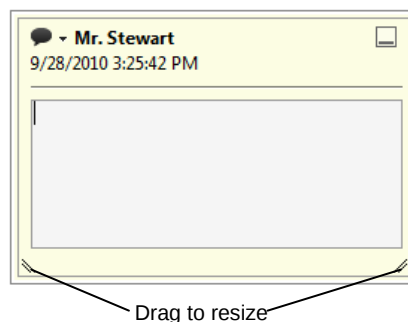


Figure 6 Sticky note

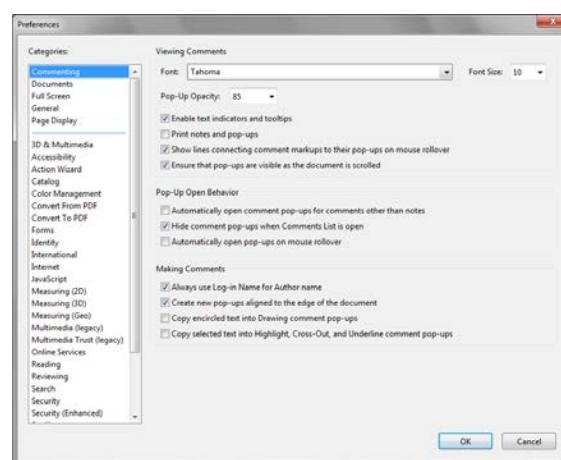


Figure 7 Commenting preferences

To delete a sticky note comment:

1. Click to select the sticky note in the document or in the Comments List and press Delete.
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 (**Figure 8**).

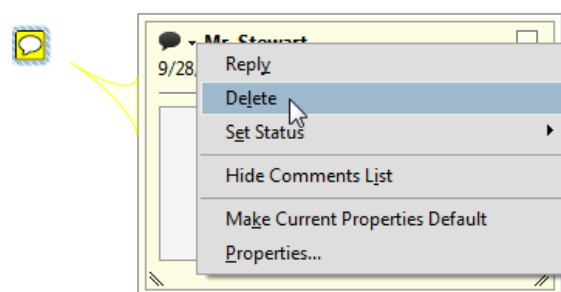


Figure 8 Sticky Note Options menu

Editing text by using the annotation tools

As a reviewer you can annotate a document with very specific change requests by using the Acrobat annotation tools. By annotating in Acrobat, you can provide detailed feedback, while leaving the final edit decisions to the author. Each edit is added as a comment in the Comments List, making them easy to reference by the author or other reviewers.

To replace selected text:

1. Select the text you wish to replace in the document.
2. In the Annotations panel, select the Replace tool.
The selected text is automatically crossed out and a pop-up note is created that is linked to the crossed-out text (**Figure 9**).
3. Type the replacement text into the pop-up note.
You can also copy and paste text into the note.

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

4. If you need to edit or delete the Replacement Text pop-up note, you can easily adapt the instructions for editing or deleting a sticky note.

Note: The steps for using the Add Note To Text, Insert, Underline, and Strikethrough tools are the same as the steps for the Replace tool.

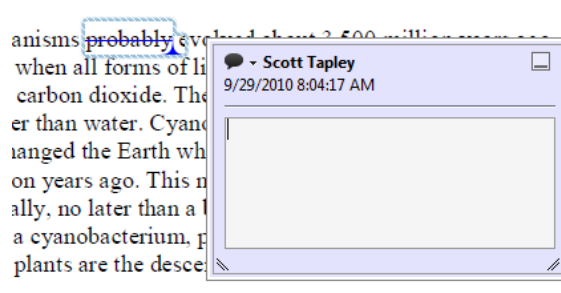


Figure 9 Replacement Text pop-up note

To highlight text:

1. In the Annotations panel, select the Highlight Text tool.
2. Select the text you wish to highlight.
The selected text is highlighted in yellow.
3. Double-click the highlighted text to reveal the pop-up note associated with the text (**Figure 10**).
4. Type your comment into the pop-up note.

You can also copy and paste text into the note.

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

If you need to edit or delete the Highlight Text pop-up note, you can easily adapt the instructions for editing or deleting a sticky note.

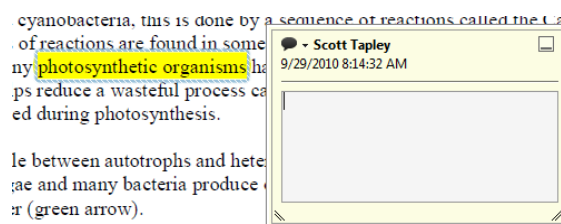


Figure 10 Highlight Text pop-up note

Stamping documents

When you are exchanging documents repeatedly or using multiple reviewers, consider using the stamp tools. Reviewers can use stamp tools to mark the document with a graphic that denotes the document's status. Users may also use this tool to mark a document as a draft. Multiple reviewers can stamp a document, providing a clear history of the review process.

Acrobat provides a set of Dynamic stamps that denote the document status, automatically generate the time and date of review, and provide the option to show the reviewer's name. The five preset Dynamic stamp options are Revised, Reviewed, Received, Approved, and Confidential. Dynamic stamps are an excellent way to quickly mark a document with important details about the receipt or review of a document. In addition to the Dynamic stamps, there

are stamps used to identify where to sign a document and there is a large collection of standard business stamps, such as Approved, Confidential, and Void. You can even create custom stamps.

To add and edit a preset stamp:

1. In the Annotations panel, click the Add Stamp tool to open the pop-up menu, and then click Dynamic or Sign Here, or Standard Business (**Figure 11**).
2. Choose the appropriate stamp from the submenu.

You can set up your identity with the Identity Setup dialog box (**Figure 12**), which automatically appears if you have not already set up your identity. Fill out the dialog box with your pertinent details and click Complete.

Note: On future use, your identity will default to what you entered the first time you used a Dynamic or Standard Business stamp. To edit your identity details in Acrobat or Reader, choose Edit > Preferences and select the Identity category on the left.

3. Position the mouse pointer over the document.
Your chosen stamp appears in a faded-out color and moves with your cursor.
4. Click on the page where you want the stamp to appear.
The Dynamic stamp appears in full color and includes your name and the time and date when the stamp was added (**Figure 13**).
5. To edit or delete a stamp, click on it and transform handles appear along the border of the stamp (**Figure 14**).
Use the handles to scale, rotate, or move the stamp. Right-click (Windows) or Control-click (Mac OS), and choose Delete from the context menu to remove the stamp.
6. To attach a pop-up note to a Dynamic or Standard Business stamp, right-click (Windows) or Control-click (Mac OS), and select Open Pop-Up Note or simply double-click the stamp. Type the desired text into the pop-up note.

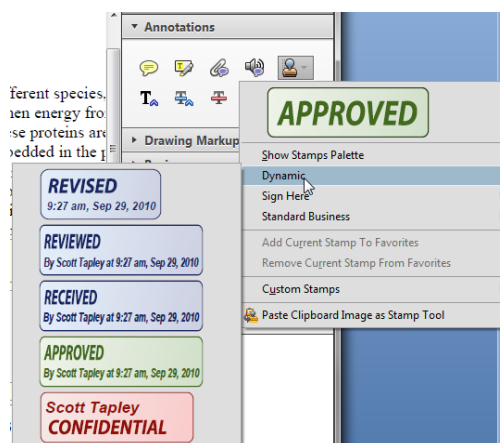


Figure 11 Dynamic stamps menu

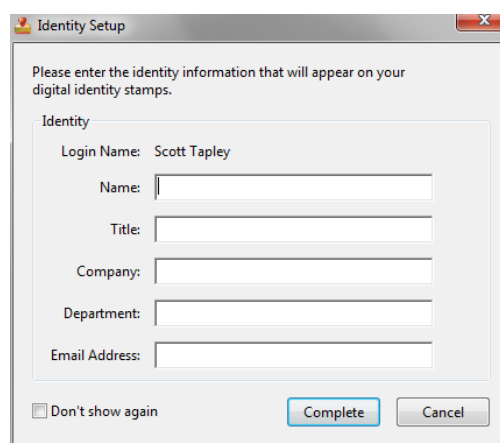


Figure 12 Identity Setup dialog box

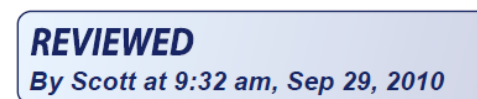


Figure 13 Reviewed Dynamic stamp sample

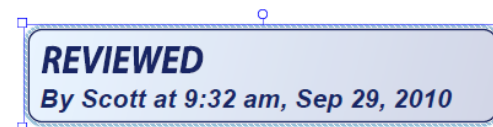


Figure 14 Scale, rotate, and move handles

Attaching files in a PDF document

As an author of a document, it's common to include reference links to additional content stored in other documents or on the Web. As a reviewer, you can refer the author or other reviewers to additional information by attaching files, such as documents, worksheets, HTML files, Flash video, SWF files, or MP3 audio clips to the PDF. You can attach any file type to the PDF, but the author or reviewer must have the correct application used to open and view the file.

To attach a file to a PDF document:

1. In the Annotations panel, click the Attach File tool.
2. Position the mouse pointer in the PDF document where you want to attach the file.

The pointer changes to a thumb tack.

3. Click in the PDF document where you want to place the attached file.

The Add Attachment dialog box appears.

4. Browse to locate a file to attach. Select it and click Open.

The File Attachment Properties dialog box appears (**Figure 15**). You can change the appearance of the icon representing the attachment.

On the General tab, you can change the general properties associated with the attachment, including who placed the attachment. The Review History tab lists any change of status for the attachment.

5. On the Appearance tab, select an icon for the attachment, and click OK.

The icon you selected appears where you clicked in the document (**Figure 16**).

6. To view the attached file, double-click the attachment icon.

A message appears, warning you that opening attachments has risks, including viruses that may infect your computer.

7. As long as you trust the source of the file, select Open This File, and click OK.

As long as you have the appropriate application, the file opens in a new window.

8. When you are finished viewing the attachment, close the file and return to Acrobat.
9. To remove an attachment, right-click (Windows) or Control-click (Mac OS), and select Delete.

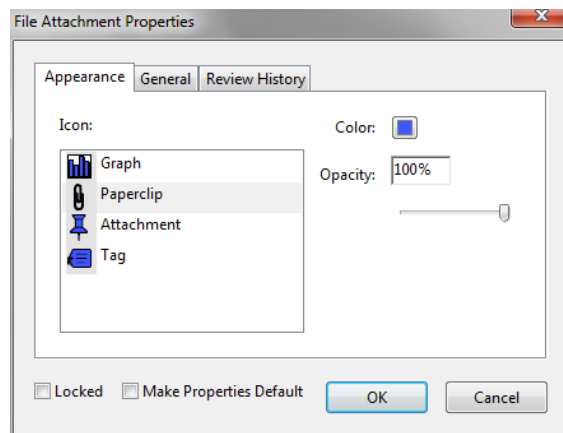


Figure 15 File Attachment Properties dialog box

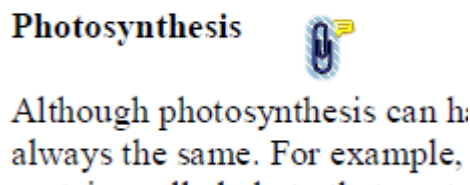


Figure 16 File Attachment icon

Reviewing and commenting on video

When you view a video embedded in a PDF, you can add comments to individual frames. Each comment is attached to a specific frame so the comments appear in the context in which they were made. This feature is useful if you frequently need to review rough cuts of videos. Frame-by-frame video commenting makes the review and revision processes quicker and more efficient.

To comment on a frame of video:

1. Use the Flash Player navigation controls to navigate to the frame in the embedded Flash Video you wish to comment on.
2. Use the Sticky Note tool, Stamp tool, or any of the graphical markup tools to comment on specific frames in the video.

As you create a comment, Acrobat automatically attaches a pop-up note (**Figure 17**) with the video time code referencing the specific frame in the video to which the comment applies.

3. Type your comment in the pop-up note.
4. You can view all the comments on the embedded video by using the Comments List.

Comments on video assets contain a small blue cube in the comment icon (**Figure 18**). The list shows the comments in the order in which they appear in the video.

When you select video comments in the Comments List, the video jumps to the point in the where the comment was made.

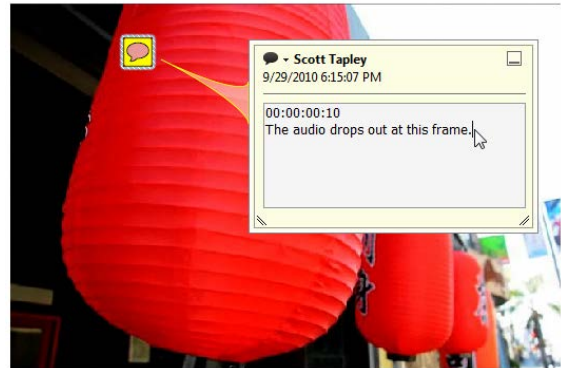


Figure 17 Sticky note comment on a frame of video

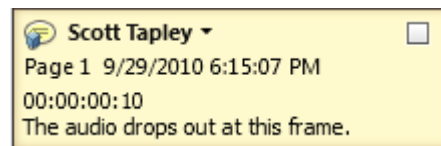


Figure 18 Comments List showing a comment made to a video

Using audio commenting

Acrobat includes an audio commenting feature with which you can record audio comments from within Acrobat. Audio commenting adds a personal touch to commenting documents. Also, audio comments may be easier and more effective when your comment is lengthy or you are explaining a difficult concept. The built-in microphones on most computers should be sufficient for recording audio comments.

Note: Audio commenting can quickly increase the size of your document file. Be aware of your recipient's capabilities for sending and receiving large files and consider any restrictions when you plan your document management strategy.

To add an audio comment:

1. In the Annotations panel, select the Record Audio tool.
The pointer changes to a speaker icon.
2. Click to place the audio comment in a specific location in the document.

The Sound Recorder appears (**Figure 19**).

3. If you have already recorded audio in a separate application, you can click Browse to select the audio file. Otherwise, click the red record button to begin recording. Using your computer's built-in microphone, record the audio comment you wish to make.
4. Click the stop button when you finish.
5. You can review your audio comment by clicking the play button. Move the slider left and right to review portions of your audio comment. You can click the record button again to record additional comments.
6. When you are satisfied with your audio comment, click OK.

You may wish to make adjustments to the appearance of the audio comment.

7. In the Sound Attachment Properties dialog box (**Figure 20**), you can change the icon style, color, and opacity of the comment marker. Click OK.

The audio comment icon appears on the page at the desired location (**Figure 21**).

8. To listen to the audio comment, double-click on the comment or right-click (Windows) or Control-click (Mac OS) on the comment and select Play File from the audio comment menu (**Figure 22**).
9. To delete the audio comment, right-click (Windows) or Control-click (Mac OS) on the comment and select Delete from the audio comment menu (**Figure 22**).

Note: You cannot edit audio comments in Acrobat.

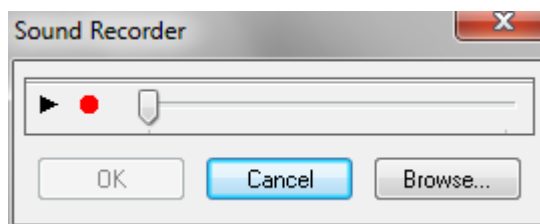


Figure 19 Sound Recorder

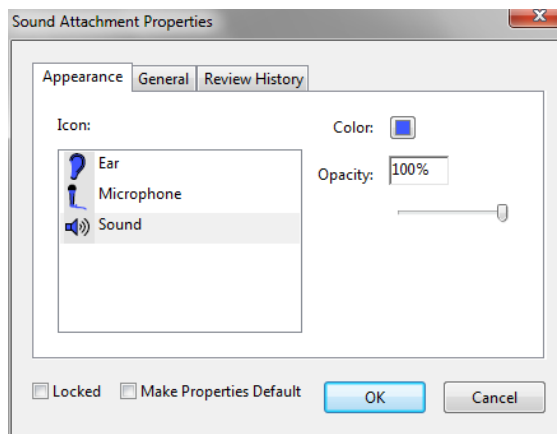


Figure 20 Sound Attachment Properties dialog box

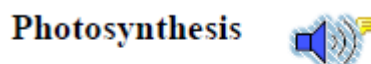


Figure 21 Audio comment icon

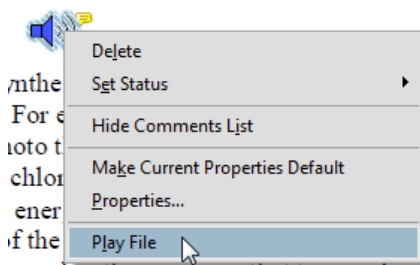


Figure 22 Audio comment menu

Drawing and Markup tools

Acrobat provides a number of graphical markup tools that may be helpful if you are evaluating portfolios or documents that contain multimedia content. Select a tool and drag on the document to create the graphical markup.

Add Text Box tool  Places a box on top of the document into which you can insert text.

Add Text Callout tool  Create an arrow pointing to a specific location and a box into which you can add text.

Draw Cloud tool  Click around an object or text to draw a cloud around it.

Draw Line and shape tools  Draw shapes to highlight specific elements in a document.

Draw Connected Lines tool  Draw Connected lines. To end lines, double-click the last point.

Draw tool  Draw freeform lines.

Erase tool  Erase freeform by clicking and dragging.

Showing and hiding comments and viewing the Comments List

You can view all comments in a document by opening the Comments List panel. You can sort comments by type, page, author, date, or status. You can filter the comments list by type of comment, or by author. These functions are helpful when multiple people have reviewed the document or when you have a document with numerous comments.

To view the Comments List:

1. Open the Comments pane.
The Comments List appears at the bottom of the Comments pane (**Figure 23**).
2. Click any comment in the list to view it in the document.
The document scrolls to show the comment you select.

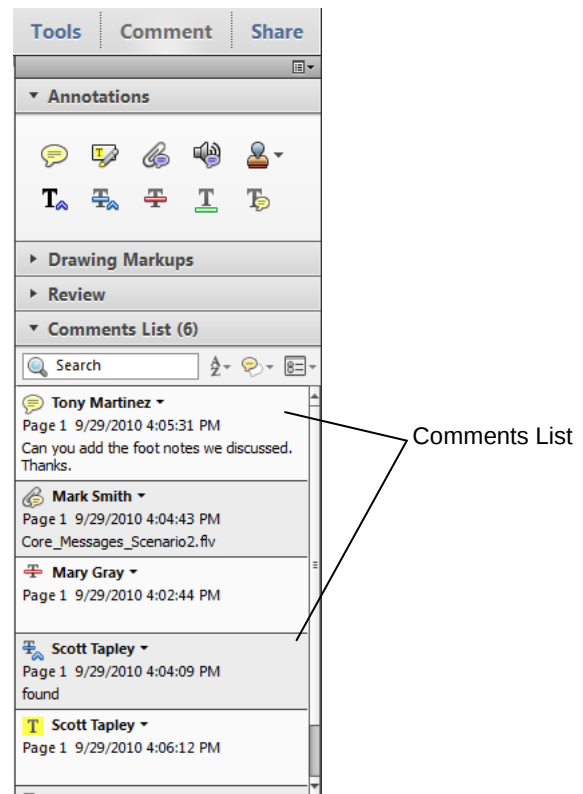


Figure 23 Comments List

To view and sort comments in the comments list:

1. Click the Sort By button in the Comments List toolbar.
2. From the menu, select the category you wish to sort by (**Figure 24**).

You can sort by type, page, author, date, or status. The comments are sorted according to the setting you select.

3. To expand or collapse lengthy comments, select a comment and click the plus or minus button next to it in the list (**Figure 25**).

You can expand or collapse all comments by using the Expand All and Collapse All options in the Comments List Options menu (**Figure 26**).

4. To delete a comment, select the comment in the list and press Delete.

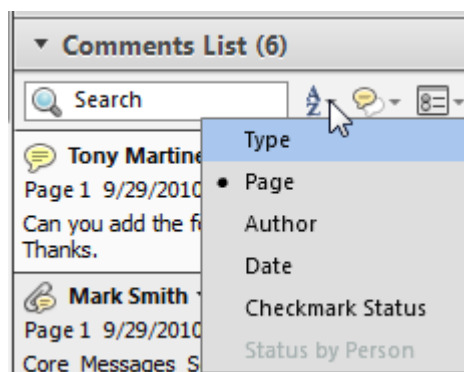


Figure 24 Sort By menu

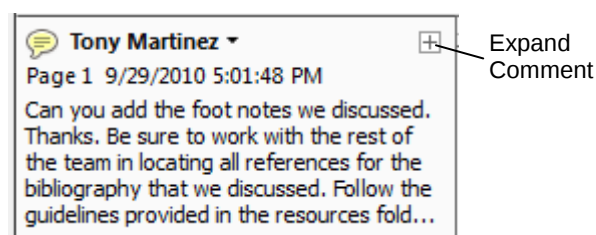


Figure 25 Expand Comment button

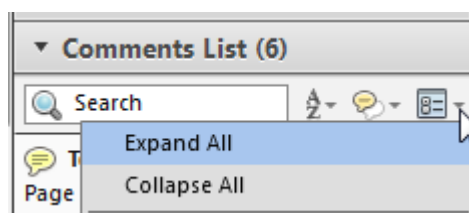


Figure 26 Comments List Options menu

To reply to comments:

1. In the Comments List, right-click (Windows) or Control-click (Mac OS) and click Reply.

In the Comments List, the comment expands to include a reply field (**Figure 27**). You can type your reply here.

Note: You cannot reply to audio comments or attachments.

2. Double-click the comment in the document.

The reply is added to the comment's pop-up note. You may have to increase the size of the note or scroll to see the reply (**Figure 28**).

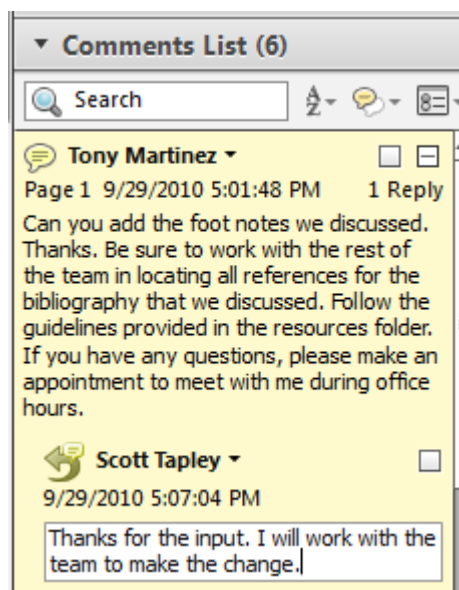


Figure 27 Reply in the Comments List

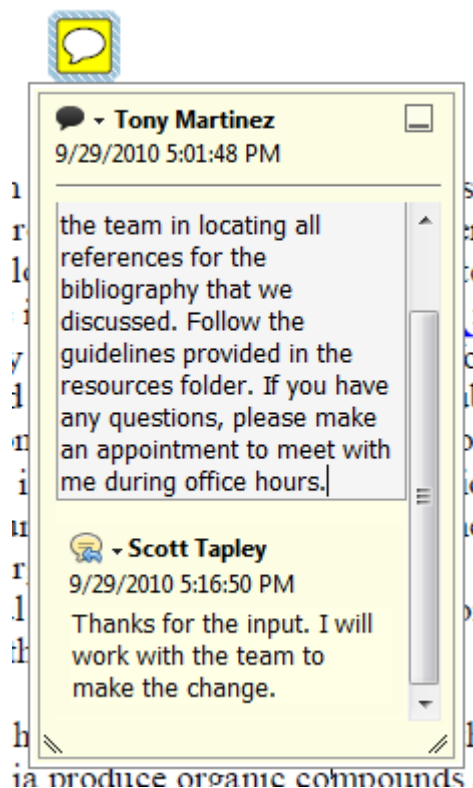


Figure 28 Reply in the comment pop-up note

To filter and search for comments in the comments list:

1. Click the Filter Comments button in the Comments List toolbar (**Figure 29**).

You can sort the comments by type of comment or by reviewer.

2. Click Type, and choose a type of comment as the filter (**Figure 30**).

The Comments List shows only the type of comment you selected. Filtering by reviewer shows only comments that were added by the reviewer you select.

3. To clear the filter, open the Filter Comments menu and choose Clear Filters.
4. To search for comments by keyword, click in the Search box in the Comments List and type.

As you type, the comments list filters automatically to show possible matches (**Figure 31**).

5. To clear the search, delete the contents of the Search box or open the Filter Comments menu and choose Clear Filters.

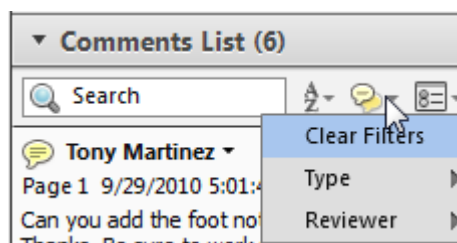


Figure 29 Filter Comments menu

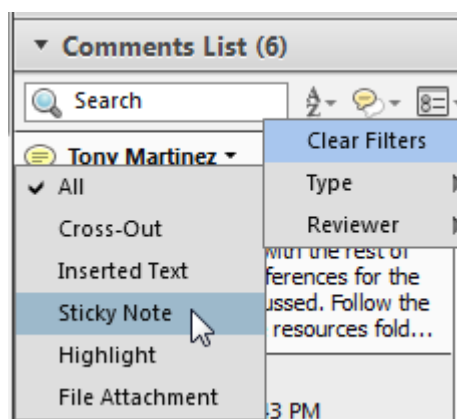


Figure 30 Filter Comments menu

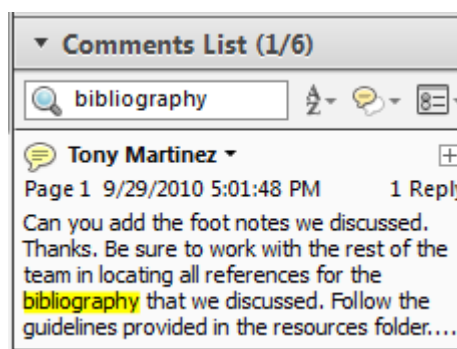


Figure 31 Keyword search for comments

Creating a comments summary document

When you have completed your commenting and markup of a document, you can create a summary document as a convenient container for all your comments. This feature is useful for documents that have many comments or markups that are difficult to view simultaneously within the original document.

To create a comment summary document:

1. In the Comments List, click the Options button to open the Comments List Options menu (**Figure 32**).
2. Click Create Comment Summary.

The Create Comment Summary dialog box appears (**Figure 33**).

Choose from the following layouts and settings for your summary document:

- Document and comments with connector lines on separate pages
- Document and comments with connector lines on single pages
- Comments only
- Document and comments with sequence numbers on separate pages

3. Click the Comment Summary button.

Acrobat automatically creates the summary document and opens it in a new window.

4. Save the new summary document with the desired filename and location.

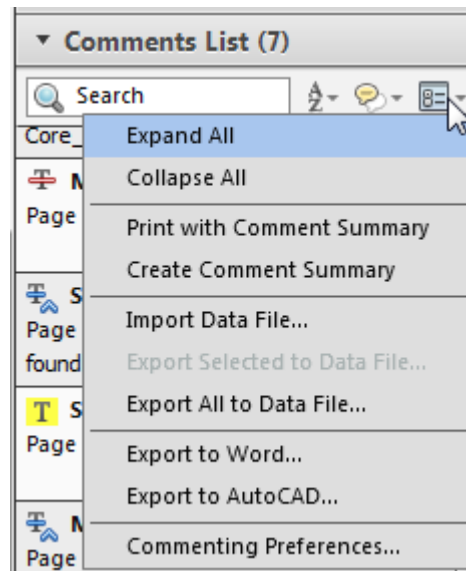


Figure 32 Comments List Options menu

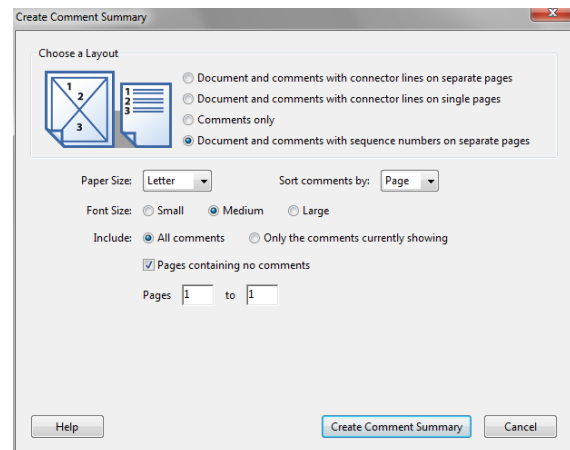


Figure 33 Create Comment Summary dialog box

Collecting comments from multiple reviewers

When your document requires input from multiple reviewers, you can use the built-in shared reviewing tools to make this process easy. Initiate an e-mail review to automatically attach a PDF document to an e-mail that contains instructions for reviewing and returning the document. The collaborative reviewing features make it easy to collect comments from multiple reviewers. By signing up for a free Adobe Acrobat.com account, you can post documents for shared review. After posting a document for shared review, you can use the Acrobat Tracker feature to see when documents have been reviewed and who has reviewed them.

To attach a PDF document for e-mail review:

1. Open the PDF you want to send for review and save any changes that you've made to the document.
2. Open the Comments pane and expand the Review panel (**Figure 34**).
3. Click Send For Email Review.

To initiate an e-mail review, you must first enter your identify information. If you haven't done this already, the Identity Setup dialog box appears (**Figure 35**).

4. Complete the information in the Identify Setup dialog box and click Complete.

Note: The Email Address field is required for reviewers to be able to automatically return the document to you.

5. In the Getting Started dialog box (**Figure 36**), browse for the file you wish to send for review.

Acrobat automatically inserts the current document you are working on into the field.

6. Click Next.

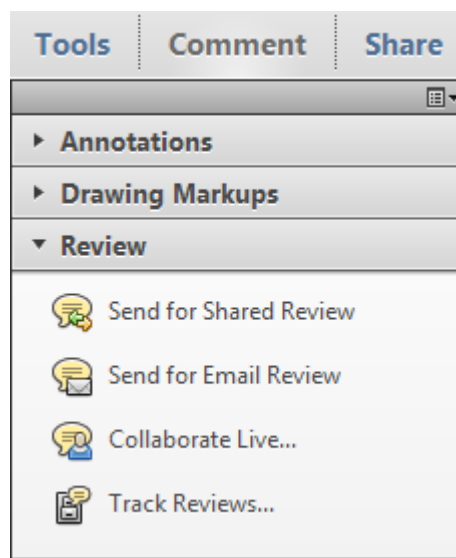


Figure 34 Review panel

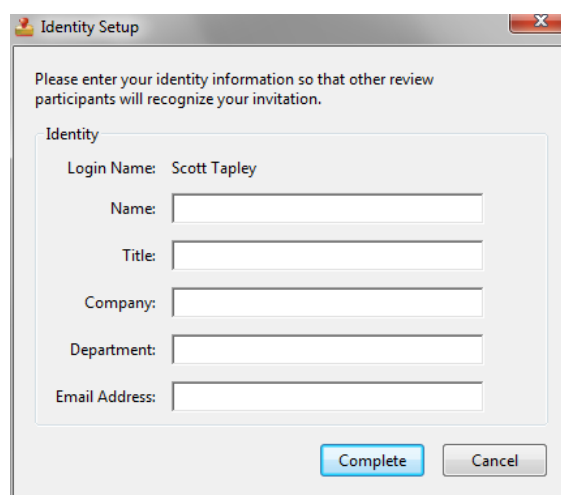


Figure 35 Identity Setup dialog box

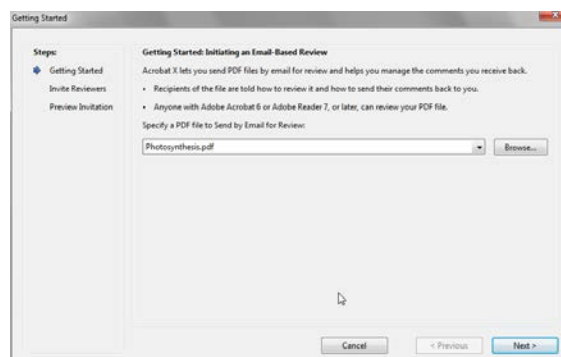


Figure 36 Getting Started dialog box

7. In the Invite Reviewers dialog box (**Figure 37**), enter the e-mail addresses of the people you wish to invite to review your document.

Separate e-mail addresses by commas or put each address on a separate line.

8. Click Next.
9. In the Preview Invitation dialog box (**Figure 38**), change the subject and text of the e-mail reviewing invitation to provide custom instructions to your reviewers.
10. Click Send Invitation.

Acrobat automatically creates an e-mail message in your default e-mail application and sends it to each reviewer.

The Outgoing Message Notification appears (**Figure 39**).

11. Read the notification carefully and note that you may have to manually send the e-mail message.
12. Click OK.

Your document is sent for review.

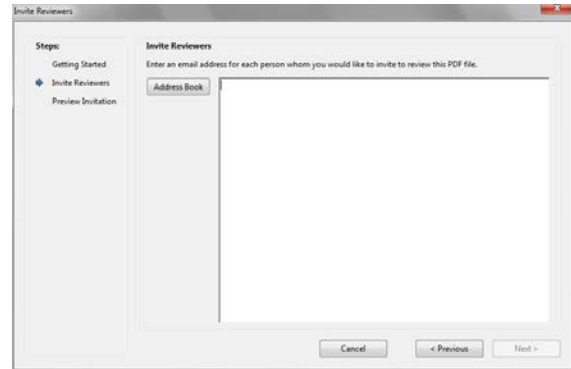


Figure 37 Invite Reviewers dialog box

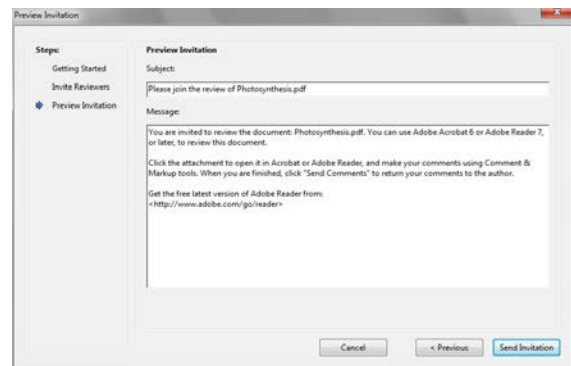


Figure 38 Preview Invitation dialog box

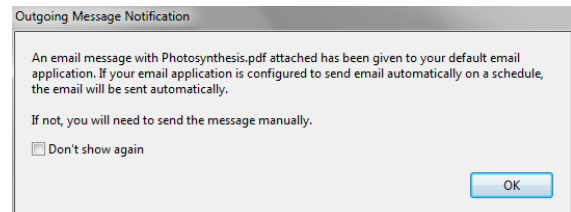


Figure 39 Outgoing Message Notification

To receive and return an e-mail review:

1. In your e-mail application, open the e-mail review message from the person who is asking you to review a document.
2. Save the attached document to your desired location on your computer.

3. Open the document in Acrobat 6 or later or in Reader 7 or later.

A shaded yellow document status notification appears across the top of the document, with instructions for commenting on the document and returning it to the sender (**Figure 40**).

4. Use the commenting and markup tools to provide your review of the document. When you finish, click the Send Comments button in the shaded yellow document status notification (**Figure 40**) to return your comments to the review initiator.

Acrobat automatically creates an e-mail in your default e-mail application and sends it to the review initiator.

To share a document for review by using Acrobat.com:

1. Open the PDF that you want to share for review and save any changes you've made.
2. In the Comments pane, expand the Review panel (**Figure 41**).
3. Click Send For Shared Review.

The Send For Shared Review dialog box appears (**Figure 42**).

You can distribute the document for review. Reviewers can use Acrobat 9 or later or Acrobat Reader 9 or later to review and make comments. Then, all reviewers can see and reply to each other's comments in Acrobat or Reader.

- 1.

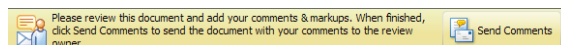


Figure 40 Document status notification

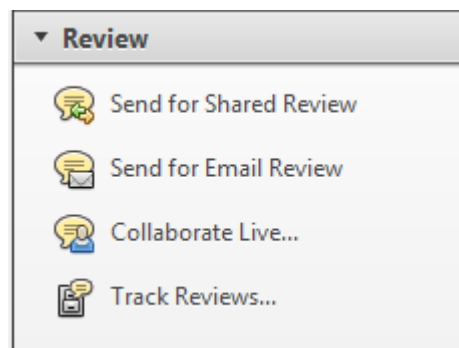


Figure 41 Review panel

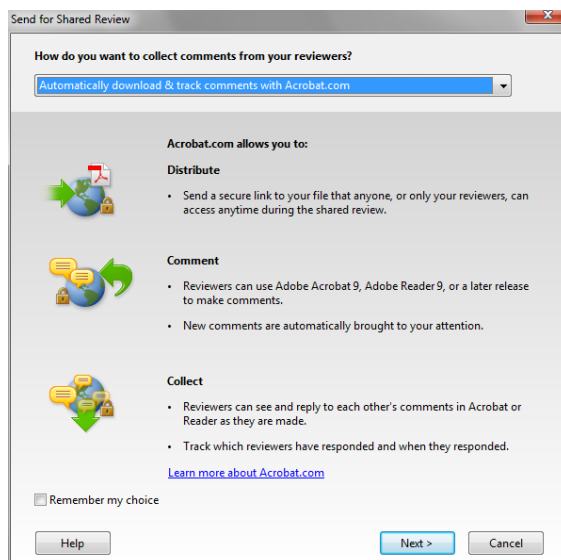


Figure 42 Send For Shared Review dialog box

4. Open the pop-up menu at the top of the dialog box.

You can distribute and collect the forms using Acrobat.com, or by using your own internal server (**Figure 43**).

5. Click Automatically Download & Track Comments With Acrobat.com.
6. Click Next.
7. Sign in to your Acrobat.com account.

If you don't have an account, you can sign up now.

The next step is to create a message inviting recipients to view and complete the form online (**Figure 44**).

8. Enter the email address for each recipient in the To box.

Note: Click To for quick access to email addresses in the address book of your default email client.

You can accept the default email subject and message or make changes.

9. At the bottom of the dialog box, open the Access Level pop-up menu and select who can review the document.
10. Click Send.

If your PDF already includes comments, a warning message appears asking if you want to publish them to the review server. Clicking Yes will publish the document with the comments. Choosing No will remove the comments before publishing the document.

Acrobat uploads the document to Acrobat.com.

A message appears when the upload is complete (**Figure 45**).

The email invitation is sent to your recipients. It contains a link to download the PDF for review (**Figure 46**).

When someone downloads and opens the PDF, they can add comments, and then use the buttons in the document status notification bar to check for new comments or publish their comments for other reviewers (**Figure 47**).

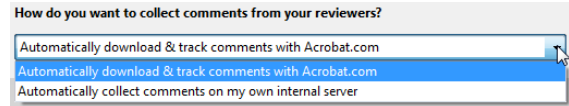


Figure 43 Choose how you want to collect comments from your reviewers

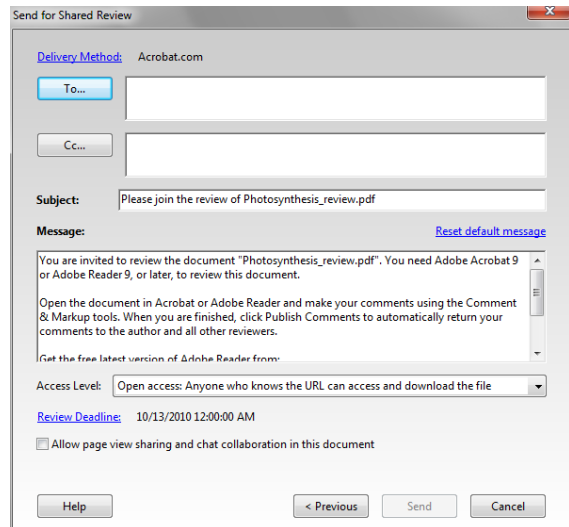


Figure 44 Create the distribution email



Figure 45 The message is saved to Acrobat.com

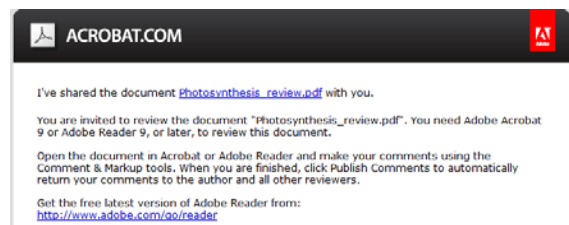


Figure 46 Email review invitation



Figure 47 Document status notification

Tracking comments in a shared review

Once you've shared a document for review, you can use the Acrobat Tracker to quickly see who has reviewed the document, add new reviewers, view comments, set a deadline for receiving comments, and end the review.

To track a review:

1. In the Review panel, click Track Reviews (**Figure 48**).

The Tracker dialog box appears (**Figure 49**).

2. In the left pane, expand the list of Reviews and select the review you want to track.

The right pane includes a link to View Comments.

3. Click View Comments in the right pane of the Tracker dialog box to view comments left by other reviewers.

You can use the links in the right pane to set a deadline for the review, send an email to all reviewers, add reviewers, and end the review.

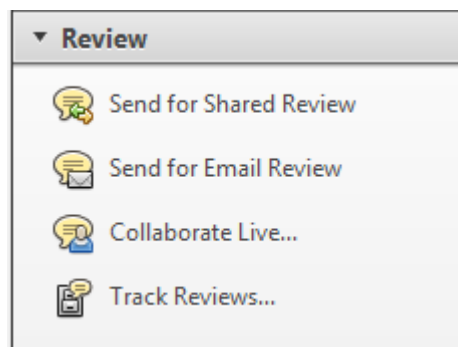


Figure 48 Review panel

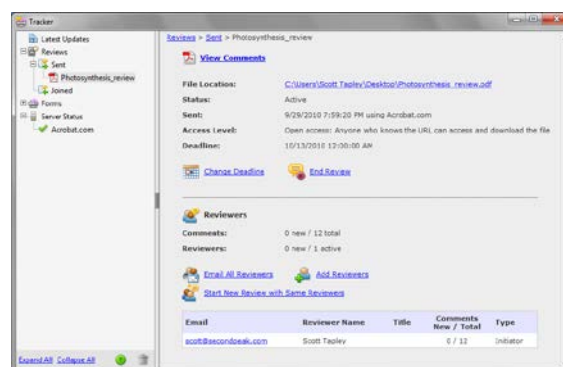


Figure 49 Tracker dialog box

To import comments from a separate document:

1. In Acrobat, open the PDF document to which you want to add the comments.
2. Open the Comments pane.
3. Open the Comments List Options menu (**Figure 50**), and click Import Data File.

The Import Comments dialog box appears.

4. Browse to locate the file containing the comments you want to import, select it, and click Open.

The comments are added to the Comments List in the open PDF document.

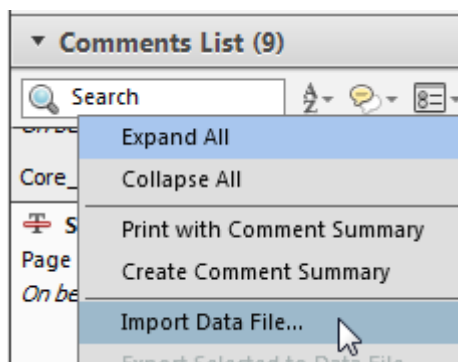


Figure 50 Comments List Options menu