# Contributing to an Acrobat Shared Review

## Tutorial Script

### Title (slide)

Today I'm going to show you how to work with Adobe's Acrobat shared review features which will enable you and others to proof and specify amendments to artwork and other documents electronically.

Shared review PDFs are a special kind of Acrobat document that save comments added to it to Adobe’s server so that all contributors and the author have access to them. Although they can be sent as attachments to an email, you will usually receive an email via Adobe from the author containing a link to download the PDF.

If you are watching this tutorial because you have already received an email containing a shared review document and want to know how to use it, I’ll show you how to create an Adobe account, login and download or open the review PDF, as well as sharing your comments and corrections with all participants.

If you have yet to receive your first shared review PDF, hopefully by the end of this video you will be prepared and ready to join your own reviews when they are sent to you.

### Software required (slide)

In order to participate in a shared review, you must have either Acrobat or Acrobat Reader installed on your computer. I'll be working with Acrobat Reader 11, and if you want to follow along with what will be shown on screen I recommend you use this version, although the review features will work with earlier versions as far back as version 9. Some commands and tools may appear in different positions in earlier releases of the software.

### Steps Outline (slide)

First, I will show you how to create an Adobe account that you can use when working with shared review PDFs.

I will then then show you how to download the PDF from the email sent to you, open it and add a variety of corrections and comments to the document.

I will also show you how to edit, delete and then publish those comments to everyone who has access to the review.

### Creating an Account at Acrobat.com (video)

In order to participate in a shared review, you will need to have already registered an account with Adobe. They call it an Adobe ID. If you haven’t got one already, let’s make a start by creating this account.

Open a web browser and in the address bar type in the Acrobat.com.

In the Acrobat.com site, look for the drop-down box in the upper right-hand corner of the page and select Acrobat.com.

A new page will appear requesting your Adobe ID and password. In the lower right-hand area of this page, click on the ‘create an Adobe ID’ button.

In the email address field, type in the email address that you will be using to correspond with the person who will be creating the review document for you to contribute your comments to. Complete the remaining details before clicking the create button at the bottom right of the page.

The next page appearing in the web browser provide details of Adobe’s terms of use. Confirm your acceptance of these terms in the check box and click on the accept button in the bottom right of the page.

Once the account has been successfully created, a page will appear giving details about how to verify your newly created account. Leave this page open for the time being so that you can refer to their detailed instructions if necessary.

At this point you should check your email inbox for a message from Adobe. If for any reason it does not arrive, use the resend button in the lower left of this page to request another verification email to be sent. You will not be able to use your account until you have verified it.

### Verification Email (video)

Let’s check the email account used to create the Adobe ID, and find Adobe’s verification email. If you cannot find the email in your inbox, make sure to check your spam folder in case your mail server has mistakenly identified it as junk mail.

The email sent by Adobe contains a link to their website to confirm your account. Click on this link. A browser window will open confirming that your account has been verified.

If you have got this far you have successfully created an Adobe ID which you can use when logging in to download shared review documents.

### Downloading a shared review document (video)

If you’ve received an email from the author of a shared review inviting you to participate, we are now ready to download and edit this PDF.

Open the email and click on the link showing the document name in the main body of the message. A new web browser window will appear at Acrobat.com.

You may be expected to log in before downloading, and if you are not already logged in to the acrobat.com site, the login window will appear. Enter your Acrobat ID and password. If you wish to remain logged in the next time you visit an Adobe website, check the box appearing below the password field before clicking the sign in button.

If you are successfully logged in, you will see a low resolution image of the first page of the PDF that has been sent to you, and on the right-hand side a download button. Click on this button to start the download process.

Depending on your computer’s configuration, a dialog box may appear prompting you to open or save the document, or the document may be downloaded automatically into a folder on your hard drive. I’m going to assume here that you know where this file is located once downloaded, but if for any reason you cannot locate this file, refer to your web browser’s help files to establish its location.

### Opening the shared review PDF (video)

Let’s open the document in Acrobat Reader. A dialog box will appear providing instructions and information about the shared review document. If you are happy not to receive this message when opening future documents, check the ‘don’t show this again’ checkbox. Press the connect button to continue.

If this is the first time you have used your Adobe ID inside the Acrobat application, or if you have but not checked the ‘stay signed in’ checkbox, you will be asked to enter your Adobe ID and password. Press the sign in button in the lower right of the dialog box to continue.

If you have successfully logged in, a new dialog box will appear welcoming you to the review and listing details of all contributors to that review. You will also see information about the number of comments added from everyone, and the deadline beyond which no further comments can be added. If you are happy not to receive this message when opening future documents, check the ‘don’t show this again’ checkbox. Press the okay button in the lower right of the dialog box to continue.

I’ve now opened the downloaded document in Acrobat Reader. You will notice a yellow panel has appeared below the menu and toolbars at the top of the window. This panel is only visible when you are logged in to a shared review document, and it contains the controls to publish and check for comments. If this panel is not visible, check that you have successfully downloaded and opened the correct document from the Adobe website link in the email, as well as being successfully logged in.

### Adding and editing comments (video)

In the upper right area of the application window, look for the comment button which toggles the display of the comment panel. Inside this panel you will find four roll ups containing the Comment tools. If any of them are collapsed you can click on the triangle icon to the left to expand their contents.

The Annotations roll up contains mark-up tools commonly used to highlight text, proof read, add notes and insert multimedia, such as attached documents or recorded audio.

The Drawing Markups roll up contains tools for drawing shapes and callout boxes, enabling you to highlight particular areas of the document.

Finally, the Comments List contains a listing of all the comments made inside the document.

Inside the main window you will see the content of the PDF. Let’s start by using the annotation mark-up tools, which you would generally use instead of proofreading marks when correcting text.

I’ve prepared a guide to proofreading marks using Adobe Acrobat, and this is available for download in the ‘proofing artwork’ article on my website at eddiegreen.com, and you will find this useful when using Acrobat’s limited range of correction tools in the annotation mark-up roll up.

Click on the sticky note icon and click somewhere in the page to add a comment box. A text box will appear, in which you can type instructions or comments. By default, this is visible only when the sticky note icon on the page is double-clicked. Clicking an empty area of the page or another mark-up tool or comment will automatically hide non-selected comment boxes. This functionality also applies to all other annotation comments from the annotations roll up.

When you have finished using a tool, click on the selection tool or the hand tool in the top toolbar to deactivate further comments. If this toolbar is not visible, right click in the application’s toolbar area and check the item ‘select & zoom’ to enable its visibility.

Use the text highlighter to draw attention to a particular section of text, and add your comments or instructions in the pop-up comment box that appears while selected.

You can type text directly onto the page with the text tool. Click on an area of the page to start typing. You can change how the text appears using the pop-up toolbar visible while this tool is selected. If you need to create more space to type, select the comment and use the drag handles that appear in the corners and sides to resize.

Please note that the attachment tool and audio clip tool should not be used when working with a Shared review document.

Use the attachment tool to add a saved document as an attachment. Clicking on the page with this tool selected opens a dialog box to make a document selection. You can attach any type of file.

You can also record an audio clip using a microphone connected to your computer. Click on the record audio tool and then anywhere in the page to begin the recording process.

Click on the stamp icon drop-down to display a variety of stamps. If you are approving the design without any corrections, select the ‘approved’ stamp in the ’dynamic’ submenu to add a stamp including your name and date.

To indicate text amends, three tools in the second row of the annotations roll up can be used. The first is the ‘insert text at cursor’ tool. Click on a line of text in the position you want the correction to appear. With the comment selected, enter your instructions in the comment box shown.

Use the ‘replace text’ tool to indicate a section of text to remove. Click and drag the cursor on a line of text from the start to the end position. Enter the replacement text in the comment box.

Use the strikeout tool to indicate a section of text to be removed. As with the replace text tool, click and drag the cursor on a line of text from the start to the end position.

Use the ‘underline’ tool to mark a section of text for other types of proofreading marks that are not covered by the use of any other annotation tool. Follow my proofreading marks guide for details, but in this example I will select an area of text that I want capitalised with this tool by clicking and dragging the cursor on a line of text from the start to the end position. I will add my instruction to the comment box.

The ‘text note’ tool can perform a similar function to the features of the highlighter. Using this tool, click and drag a section of text. By right clicking over the text note you can change its properties, including its colour. By changing its colour and checking the box to ‘make properties default’, the next time you use this tool, the highlight colour is now different to the highlighter tool. In this way you could differentiate between two different types of corrections and, when used consistently, it will help other participants in the review process to rapidly identify the different types of corrections in the document.

By right clicking over any comment, a context-sensitive menu appears with shortcut commands to help you edit and organise these mark-ups. For example, if you want to delete a comment, select it and click the right mouse button over the item. You will find the shortcut to delete in the menu that appears. You can also simply press the delete button on your keyboard.

You can also move certain types of comment that are not attached to text from one part of the document to another. You can use the properties panel to change the appearance of most comments.

In the Drawing Markups roll up are a number of tools that you can use to draw shapes or even free hand writing. These tools are useful to comment on graphical elements or layout within the page such as the size and position of images or blocks of text. I’m going to leave you to play with these tools and experiment with how they work so that you can draw attention to areas of the page in a way that is meaningful to your fellow contributors and author.

For now, I’m going to publish the comments we’ve already added to the document so that other participants can see them. In the yellow top bar, click the publish comments button.

If you are connected online, your new comments will be uploaded to Adobe’s server, and once this process is complete a pop-up box will notify you of the action taken.

Similarly, you can check for comments that other participants in the review, including the author, have made at any time by clicking the ‘get new comments’ button in the yellow top bar. A pop-up will appear confirming the number of new comments received.

### Reviewing comments (video)

The comments list roll up inside the comments panel contains a listing of all comments created by you and others.

The toolbar at the top of this list allows you to search for comments containing particular text.

You can sort the comments list by alphabetical, contributor, date or checkmark status.

You can filter the comments list to include only particular types of comments.

And finally you can control the behaviour of the comment roll up, and also comment preferences in Adobe’s settings.

Clicking on an item in the comments list will highlight that comment in the main window, scrolling to position if necessary.

The checkmark in the top right-hand corner of each comment in the rollup is to indicate your acknowledgement of the comment. I would normally check this box once I had acted upon the comment, for example to correct a line of text or to resize a graphic. I would also check this box to acknowledge any other type of comment, adding my own comments where necessary

The check box value is published as an update to the original comment. When used consistently, it is confirmation that all instructions or queries have been acted upon or acknowledged, not only by yourself but by all contributors to the PDF review.

### Saving and re-opening a shared review document (video)

Once you have completed the steps described in this tutorial and published all of your comments, you will have successfully completed the shared review for the time being.

You may now close the PDF. You will be asked to save the document as a new file, and I recommend you do this so that you have an ongoing record of changes to the PDF.

Don’t forget that other contributors and the author may well be adding comments in response to your own that require your continued contribution prior to sign off of artwork. Normally there will be a separate dialogue between you so you will know to revisit the review.

In order to do this, simply open the latest saved version of the PDF, or if you have chosen not to save intermediate copies, open or re-download the original PDF sent to you. When opening the document it should automatically check for new comments and re-download any not appearing in your copy. If this is not done automatically, click the get new comments button in the yellow top bar of the document.

### Conclusion (end)

Thank you for taking the time to learn about Acrobat shared review, and I hope you can see the benefit to this method of working. Apart from saving the odd tree, once you are familiar with the review technique I’m sure you will appreciate the ability to share the review process with colleagues and communicate effectively with your creative team.

And if you’d like to find out how you could integrate Acrobat’s shared review workflow within your own organisation, please read my article on this subject at eddiegreen.com, or contact me directly for advice.

### End (slide)