# Creating and distributing PDFs for shared review

## Tutorial Script

### Title (slide)

Today I’m going to show you how to create and distribute a PDF shared review using Adobe Acrobat.

### Steps Outline (slide)

Firstly, I’ll explain what software is required and why it is necessary.

I will go on to outline the two methods of distributing PDFs through the Acrobat interface, their relative merits, and my recommended workflow.

Finally, I’ll take you through the process of creating and publishing the review document.

### What you will need (slide)

You will need to have an Adobe ID to share the review PDF using Adobe’s servers. If you don’t know what that is, read my article at eddiegreen.com and watch the YouTube video called ‘Contributing to an Acrobat Shared Review’ which shows how to get an Adobe ID.

You will need to have Adobe Acrobat standard or professional, version 9 or later, installed in order to produce PDFs for review. I am using version 11 and if you are following along with your own software, the location and appearance of some of the buttons and dialogs may be different if you are using an earlier version.

The reason you are required to use this software, rather than other PDF creation applications, is that currently Adobe Acrobat is the only application to enable comments and corrections in a PDF that can be saved in Acrobat Reader, the free version of the software which is prevalent among most computer users.

Additionally, the full version of Acrobat incorporates a fully integrated set of tools for managing comments from reviewers, and makes available an online server for the publication of documents and comments that allow multiple reviewers the ability to contribute to the review process.

### Acrobat’s PDF review methods – Email Review (slide)

Acrobat has two ways in which you can prepare, send and track changes to PDF documents.

The ‘Email Review’ method prepares a ‘reader enabled’ PDF, manages the email creation process via your usual mail client, such as Outlook or Gmail, and attaches the PDF to that email. The reviewer receives the file and saves it locally before adding comments or other corrections. The reviewer then returns the PDF via email to you. When you open this file, all comments and corrections are extracted and added to your original copy of the review document.

This method is ideal when distributing a review PDF to one person. As opposed to the ‘Shared Review’ method, the recipient will not have to create an online account at Acrobat.com in order to contribute to the review process. This method is not suitable for distributing to a group of reviewers, each of which might be adding their own comments and corrections, because such comments are not distributed to everyone in the group, but are only collated by you, the reviewer, when receiving the returned files.

### Acrobat’s PDF review methods – Shared Review (slide)

The ‘Shared Review’ method prepares a ‘reader enabled’ PDF, manages the creation of an email to reviewers generated within the Acrobat application, uploads the PDF to Adobe’s comment tracking server and includes a link to this file in the email. The reviewer opens the PDF contained in the link, adds comments and corrections, and then publishes those comments to the tracking server. These comments are immediately visible to you and all other reviewers, and the Acrobat application notifies you of ongoing additional comments made to the document at any point in time.

The drawback to using this method is that reviewers must have created an Adobe account and login to Adobe’s servers in order to interact with the PDF, something that some people will find it initially difficult or a chore to do. Despite this fact, the ‘shared review’ method is preferred, and not only when distributing to more than one reviewer, because all parties to the review are able to interact with the comments, either by marking them as completed, or by adding queries and clarifications. When managed correctly, the review document can serve as the sign off for further production work.

During the rest of this tutorial I will be showing you how to prepare a ‘shared review’.

### Creating a PDF in other applications and opening them in Acrobat (video)

First, I will save or export my document as a PDF in the way I’m most comfortable with. I’ve created this artwork using Adobe InDesign, so I will be exporting the file with compression settings suitable for proofs.

At this point, it’s just a regular PDF that I’m creating, saving it so I can open it with Adobe Acrobat later.

I’m now going to open the PDF I created and show you the Comment tools on the right-hand side of the application’s interface.

You will notice that there are four roll ups in this panel. 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.

The review roll up contains the commands that you will use to initiate and track the review process.

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

To send the document for shared review, expand the review roll up and click on ’Send for shared review’

The send for shared review dialog box will appear if you are not already logged in. I’m going to assume that you have already created an account at Acrobat.com, but if you’ve not already done this, click on the link to create an Adobe ID at the top of the dialog box.

If you need help with creating the account please see the tutorial I’ve created for reviewers which covers the steps involved in creating an account.

Enter your Adobe ID email address and password. If you check the box to stay signed in, Acrobat will save your ID and password inside the application and this dialog box will not appear again unless for some reason you have signed out.

When ready, sign in.

You are now presented with a dialog box where you will include the email address for each of your reviewers. To send to more than one reviewer, add email addresses separated with a comma or semi-colon.

If you have an application such as Microsoft Outlook installed, you can also use the buttons to the left of the email address fields to search for and enter addresses from your contacts list within that application.

Acrobat pre-completes the subject line of the email it will send, but you can change this according to your preferences. You can also change the body text.

Set the access level required for the review document. The default setting is to allow anyone who knows the URL of the review document on Adobe servers to open and contribute to the review.

But you can also restrict contributors to those recipients you have already added to the email address fields at the top of the dialog box. Those email addresses must also be the same email addresses used for their Adobe ID.

I’m going to create my review PDF with open access. That way, the review document can be circulated to other people who I may not already be aware have an interest in reviewing the document also.

Finally I’m going to change the review deadline. By default, Acrobat calculates a two-week deadline, beyond which no further reviews can be added to the document. This can be changed by clicking on the review deadline link at the bottom of the dialog box.

I can select a date and time using the entry fields for a new review deadline, or I can choose not to have a deadline. I’m changing the deadline to a week from now as an example, but usually there is no reason to change the default time period unless you have a reason to do so.

I’ll show you later how you can close a review from further comments manually and why you would want to do this. But for now I’ll enter the changes and return to the email dialog box.

I am now ready to send the email out so I will click the send button. Acrobat will display progress messages detailing the steps it is taking to prepare the PDF and send the message.

Once this is complete, the review document will appear in the Acrobat window and if there have been no errors you will receive an on-screen message notifying you that the document has been distributed and saved online. You will also notice that a yellow bar appears at the top of the document. This tracking review bar only appears when using the shared review feature, and contains information about the review together with command buttons to check for new comments, publish comments, and track reviews.

You have now successfully initiated a shared review and will wait for comments from your reviewers before working with the document again.

I recommend that you watch my other tutorial so that you understand the review process once your recipients receive their email from you. The video is available in the article on my website.

### Tracking reviews (video)

You can track and control the reviews that you have initiated in two ways. With the review document open in Acrobat, in the yellow bar at the top of the review document, select track review to bring up the track dialog box.

While the document is not open you can bring up the tracker dialog box using the helper application normally appearing in the taskbar. Double click on this icon.

From the tracker dialog box, you can open any review document by double-clicking its title.

Selecting any document title in the left panel tree will recall tracking details for that document. You can also change some important details controlling the review.

Use the change deadline link to modify the expiry date of the review. You will be prompted to send an email to reviewers notifying them of the change of deadline.

You can also use the email all reviewers link to quickly send an email from your own email application. This is useful if you want to send reminders to participate in the review or let fellow reviewers know that you have added comments.

And you can end the review before its expiry date using this dialog box. If you are planning to use the shared review documents as part of your sign off process for further production work then it is important to terminate further comments past the sign off date.

### Checking for new comments (video)

With the review document open, the yellow bar contains a command button to check for new comments. Clicking on this button fetches all comments from any other contributors since the last time you clicked the button or opened the document. If there are any new comments, a pop-up box will notify you.

### Reviewing comments (video)

The comments list roll up inside the comments panel contains a listing of all comments received.

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.

### Publishing comments (video)

I’ve gone into detail about how to create comments in the review process in my tutorial for reviewers, so I won’t cover the same ground here.

If you have been updating the check boxes to acknowledge received comments, or have been writing your own notes or comments in response to others, then you will need to publish those comments in the same way as any other reviewer in order to update all parties to the review.

Click on publish comments to post these updates to the server. A pop-up message will confirm the update.

### Conclusion (end)

Once you have completed the steps described in this tutorial and involved your clients or colleagues in Acrobat’s shared review process for the first time, I hope that you will, as I did, become converted to the paperless proofing process made available by this technique.

Acrobat proofing features appear complicated and unwieldy at first, particularly to casual users of computers such as clients and office staff, even those whose job it is to create these PDFs.

You can address this by creating a clear set of instructions and guides for both initiators and contributors to the review process. Please feel free to use my own documentation as the basis for your own, and get in touch if you need further help.

### End (slide)