Using Acrobat Comment and Markup tools

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 Annotations panel include tools to add sticky notes, highlight text, attach other documents, and insert audio commentary. You can use the text annotation tools to edit text, including insertions and deletions, strikethrough, underlines, and leaving notes for the author or other reviewers.
- The Drawing Markups panel includes 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.

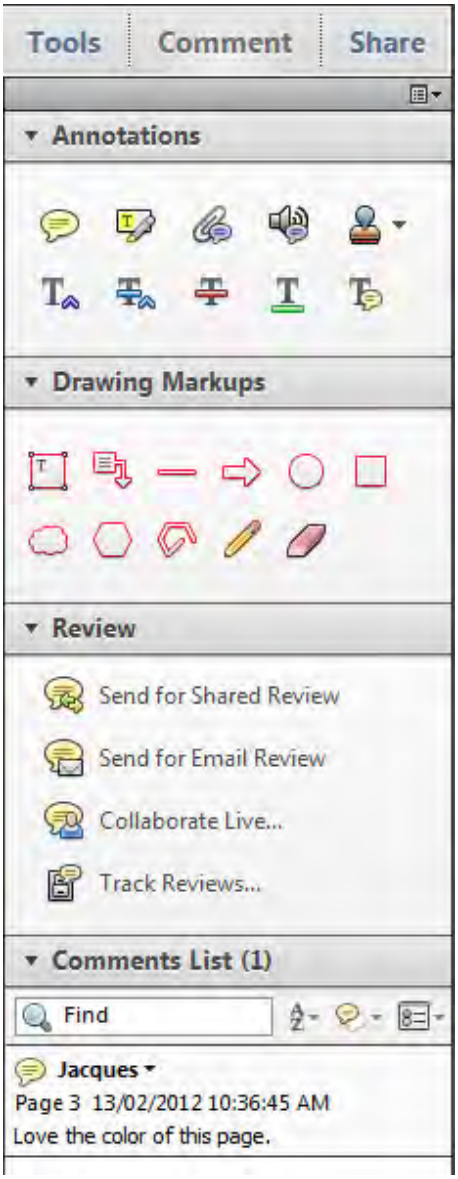

Figure 1 Comment pane

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.

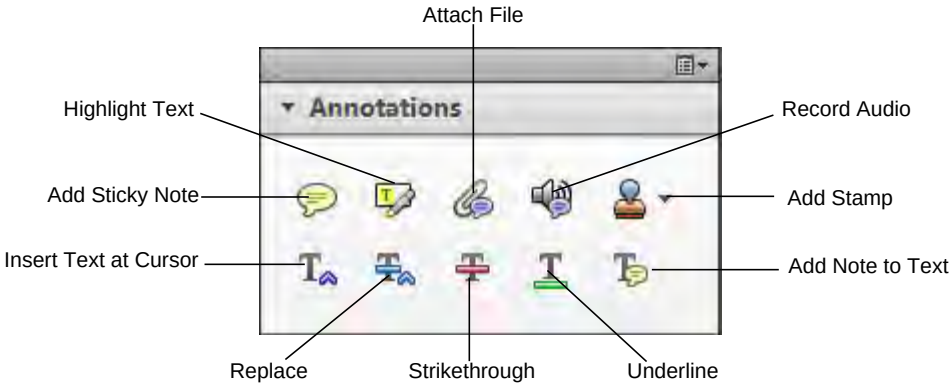

Figure 2 Annotation tools

Add Sticky Note Add a message in a pop-up note anywhere in the document.

Highlight Text Highlight the selected text in 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 in a pop-up note.

Replace Cross out the selected text and provide replacement text in a pop-up note.

Strikethrough Cross out the selected text.

Underline Underline the selected text to denote emphasis.

Add Note To Text Highlight the selected text and attach your message in a pop-up note.

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 2**), and click where you want to place the note.

   A sticky note icon is placed in the document where you clicked and a blank note opens.

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4. Type text in the blank pop-up note (**Figure 3**). You can also 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 text of your note is added to the Comments List at the end of the Comment pane (**Figure 4**).

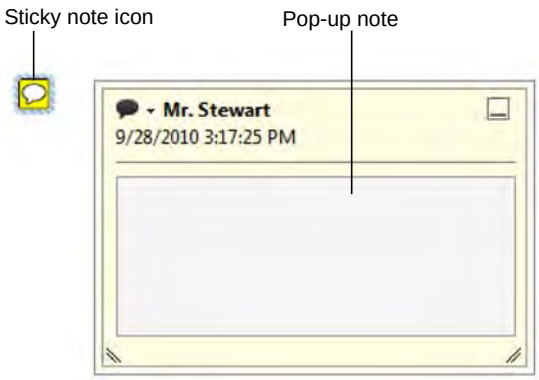

Figure 3 Sticky note

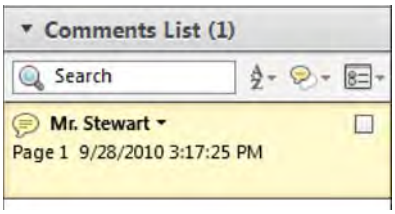

Figure 4 Comments List

To edit a sticky note comment:

1. Click or double-click the sticky note icon if the note is not already open.
2. Make changes, as needed:
   - To resize the pop-up note, drag the lower-left or lower-right corner (**Figure 5**).
   - To add bold, italic or underline style, select the text in the note, and then right-click the text (Windows) or Control-click the text (Mac OS), select 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 6**).

   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.

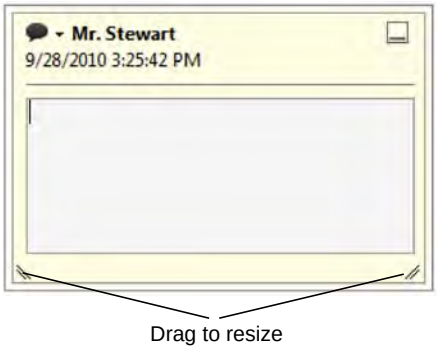

Figure 5 Sticky note

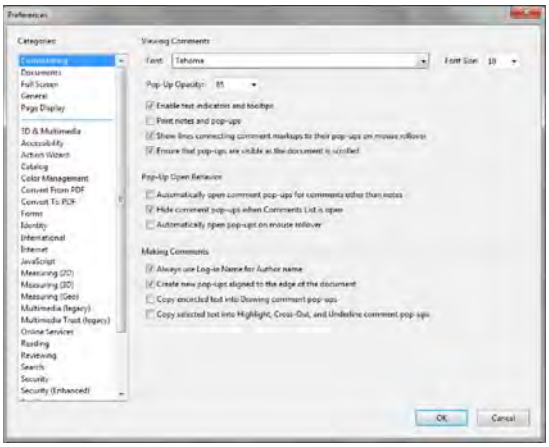

Figure 6 Commenting preferences

To delete a sticky note comment:

Do one of the following:

- Select the comment and press Delete.
- In the Comments list, select the comments you want to delete, choose Delete from the options menu (**Figure 7**).

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

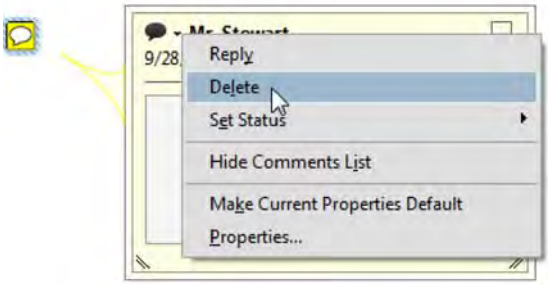

Figure 7 Sticky Note Options menu

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 8**).
3. Type the replacement text into the pop-up note.

   You can also paste text into the note from another document.

   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.
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.

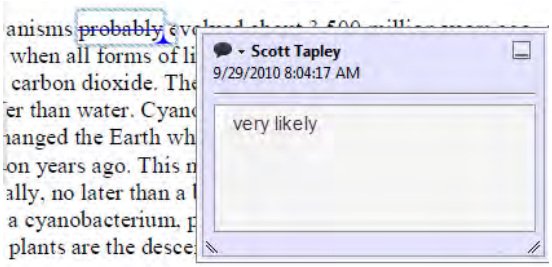

Figure 8 Replacement Text pop-up note

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. (Optional) Double-click the highlighted text to reveal the pop-up note associated with the text (**Figure 9**).

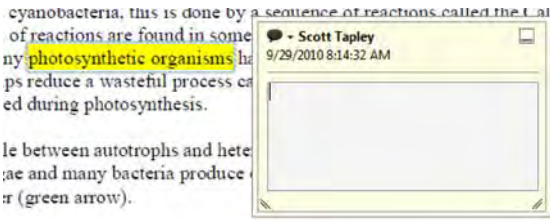

Figure 9 Highlight Text pop-up note

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4. Type your comment into the pop-up 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.

Stamping documents

When you are exchanging documents repeatedly or using multiple reviewers, consider using the stamp tools (**Figure 10**). 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.

Figure 10 Document stamps

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**).

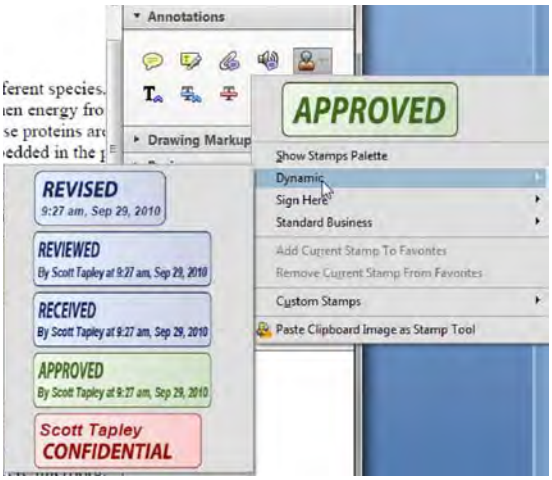

Figure 11 Dynamic stamps menu

2. Choose the appropriate stamp from the submenu that appears.

   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 (Windows) or Acrobat > Preferences (Mac OS) 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 it.

   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 Controlclick (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 double-click the stamp. Type the desired text into the pop-up note.

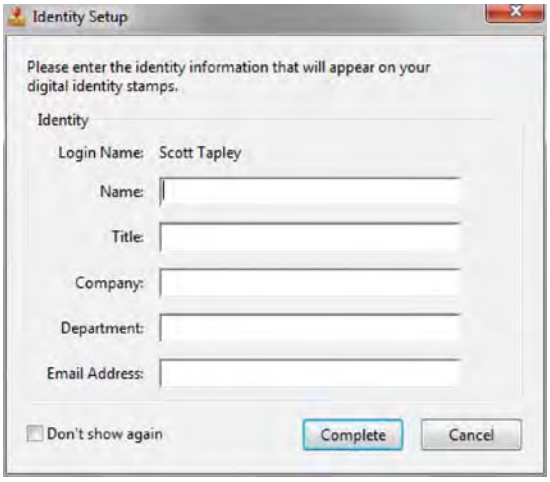

Figure 12 Identity Setup dialog box

Figure 13 Reviewed Dynamic stamp sample

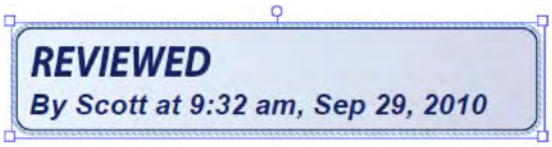

Figure 14 Scale, rotate, and move handles

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.

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

   The Add Attachment dialog box appears.

4. Browse to locate the file to attach. Select it and click Open (Windows) or Select (Mac OS).

   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 may appear, warning you that opening attachments has risks, including viruses that may infect your computer.

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

7. When you are finished viewing the attachment, close the file and return to Acrobat.

8. To remove an attachment, right-click (Windows) or Control-click (Mac OS), and select Delete.

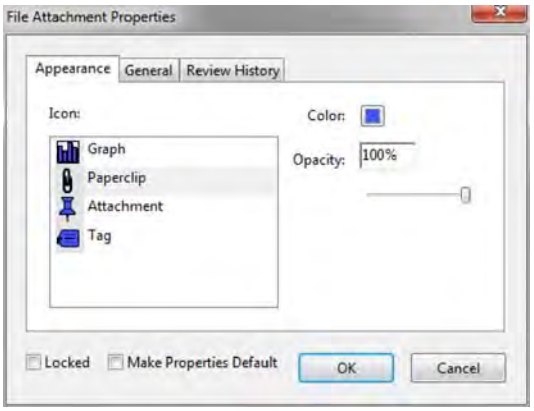

Figure 15 File Attachment Properties dialog box

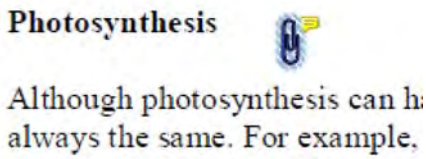

Figure 16 File Attachment icon

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.

   In Windows, the Sound Recorder appears (**Figure 17**). In Mac OS, the Record Sound dialog box appears (**Figure 19**).

3. If you have already recorded audio in a separate application, you can click Browse (Windows) or Choose (Mac OS) to select the audio file. Otherwise, click the red record button (Windows) or click Record (Mac OS) 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 (Windows only) 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 19**), 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 20**).

8. To listen to the audio comment, double-click the comment icon or right-click (Windows) or Control-click (Mac OS) on the icon and select Play File from the audio comment menu (**Figure 21**).

9. To delete the audio comment, right-click (Windows) or Control-click (Mac OS) the comment icon and select Delete from the audio comment menu (**Figure 21**).

   Note: You cannot edit audio comments in Acrobat.

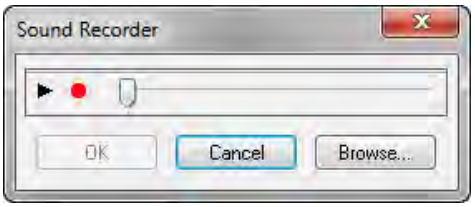

Figure 17 Sound Recorder

Figure 18 Record Sound dialog box

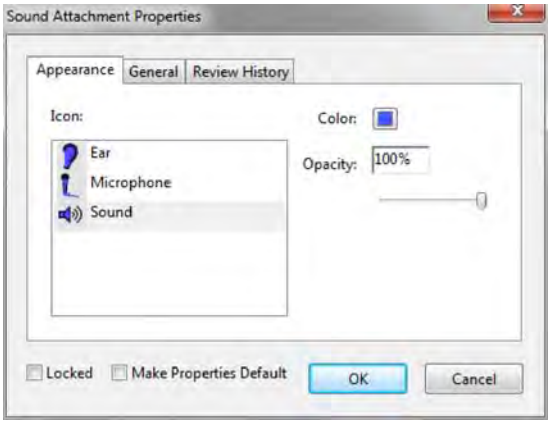

Figure 19 Sound Attachment Properties dialog box

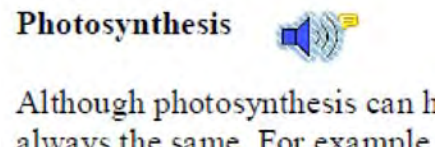

Figure 20 Audio comment icon

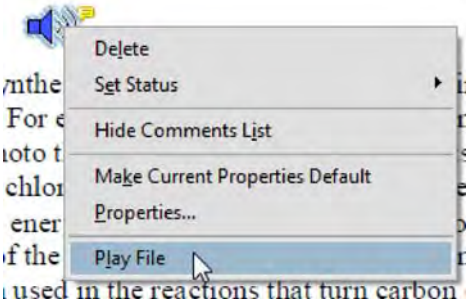

Figure 21 Audio comment menu

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Drawing 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 (**Figure 22**). Select a tool and drag on the document to create the graphical markup.

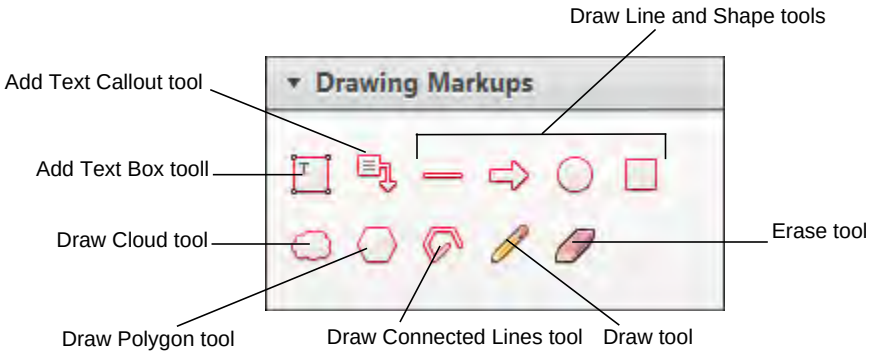

Figure 22 Drawing Markups panel

Add Text Box tool Place 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 other 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 free-form lines.

Erase tool Erase free-form 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 Comment pane.

   The Comments List appears at the bottom of the Comment pane (**Figure 23**).

2. Click any comment in the list to view it in the document.

   The document scrolls to show the selected comment.

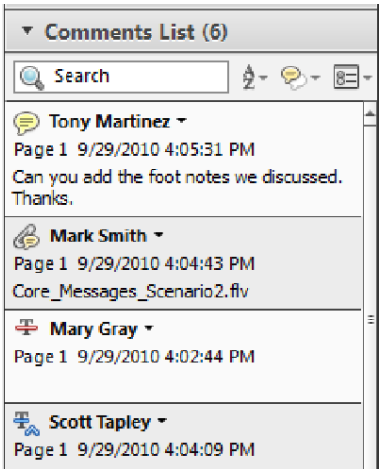

Figure 23 Comments List

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.

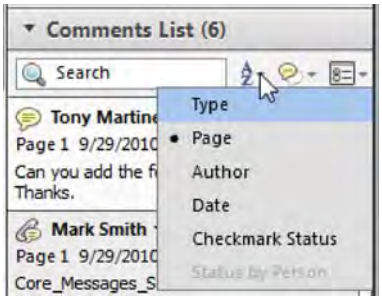

Figure 24 Sort By menu

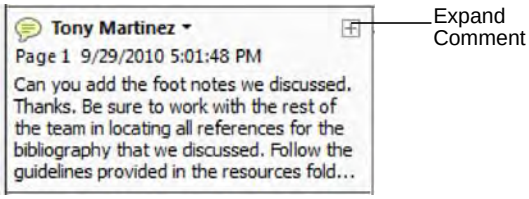

Figure 25 Expand Comment button

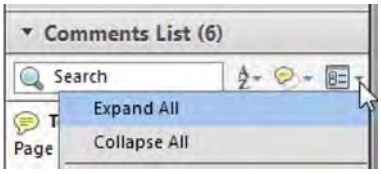

Figure 26 Comments List Options menu

To reply to a comment in the Comments List:

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**).
2. Type your reply in the reply field.

   Note: You cannot reply to audio comments or attachments.

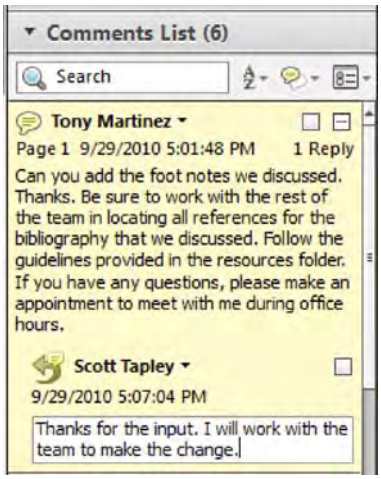

Figure 27 Reply in the Comments List

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To reply to a comment in the pop-up note:

1. 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**).

2. Click the Options menu in the pop-up note, and select Reply

3. Type your reply in the reply field.

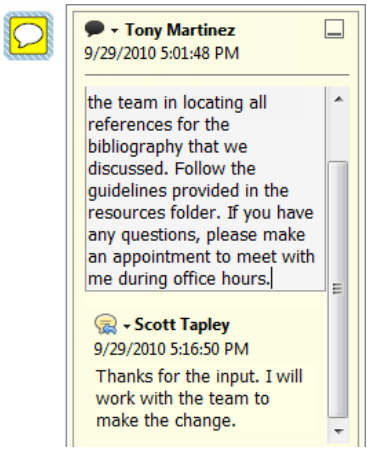

Figure 28 Reply in the comment pop-up note

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, by reviewer, or by status.

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 Show All Comments.

4. To search for comments by keyword, click in the Find 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 Find box or open the Filter Comments menu and choose Show All Comments.

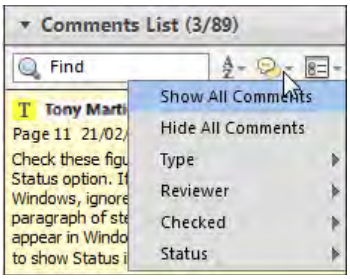

Figure 29 Filter Comments menu

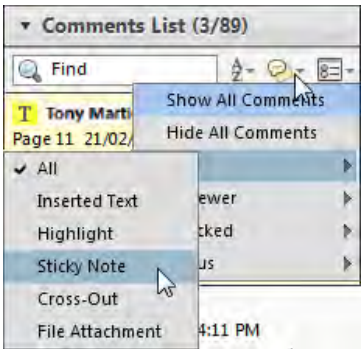

Figure 30 Filter Comments menu

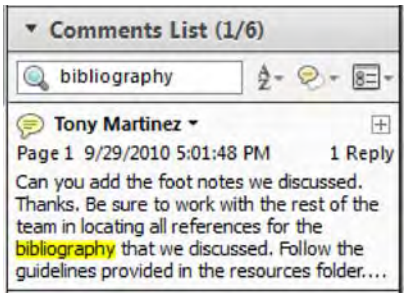

Figure 31 Keyword search for comments