

Adobe Acrobat DC Forms

Course objectives:

- Create interactive forms
- Manage form fields and properties
- Use forms in Adobe Reader
- Use PDF Actions
- Digital Signatures

This course does not cover LiveCycle.

Staff Training (Bookings only)

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Prior to commencing training, it is recommended staff open Microsoft Outlook to make use of their email client during the session.

Overview

Open **Adobe Acrobat DC** from desktop

1. Click **Windows** icon in taskbar
2. Select **Adobe Acrobat DC** icon



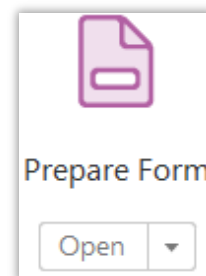
Creating Forms

You can create a form by converting an existing electronic document. Acrobat will detect fields in the document and add interactive forms fields to the form. The placement of automatic form fields may need to be examined to ensure accuracy.

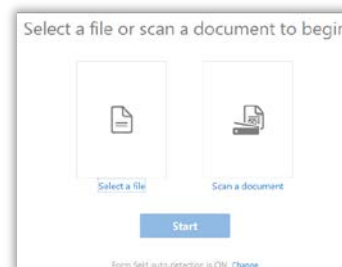
Exercise 1.

Create a form

1. Click on **Prepare Form** from the Tools Toolbar



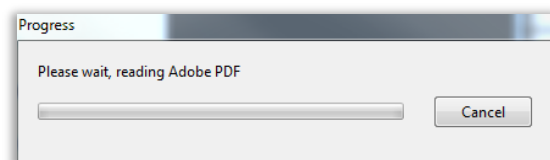
2. Click on **Select a file**
3. Select **Adobe Word Form.docx**



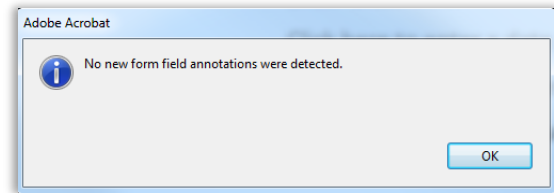
4. Select **Adobe Word Form.docx**
5. Click on **Open**
6. Click on **Start**

AdobeReviewFile.pdf	08-Apr-14 2:40 PM	Adobe Acrobat D...
AdobeWordForms.docx	08-Apr-14 12:36 PM	Microsoft Word D...
TermsOfService.pdf	08-Apr-14 12:08 PM	Adobe Acrobat D...

A message box will display to indicate progress.



If your form is in a table with no borders Acrobat may not be able to recognise spaces for form fields. Add cells borders to assist with the automatic conversion process



If your document is recognised as a form, fields will be automatically added to the file and you enter Form Editing Mode

The Forms Tasks panel will open to the top











Your form will be displayed with some form fields already in place, although some modifications may be required.

CLASS REGISTRATION FORM			
Class Title			
Date			
Time		am	pm
Venue			

Customising Forms

The form toolbar opens at the top of the screen whilst Form Editing is active. Form fields available for use include:

	Text Field	Lets the user enter text responses
	Check Box	Provides yes or no choices
	Radio Button	Allows users to select one item from a selection
	List Box	List of options to choose from. Can be set to allow multiple items using CTRL button
	Dropdown	Allows user to choose an item or enter a response
	Button	Initiates an action such as submitting a form
	Digital Signature	Uses a digital signature to sign a PDF
	Barcode	Encodes data that people type into a form

Exercise 2.

Remove form fields

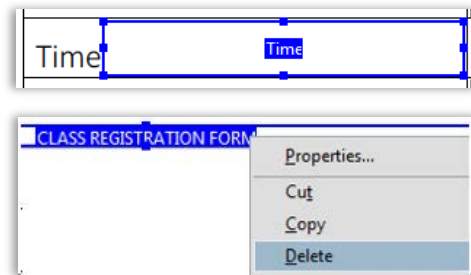
1. Click on **Investors in Education** field
2. Press **delete**

Alpheius Global Enterprises

Investors in Education

3. Repeat for **Time** field

4. Right click on Class Registration Form field
5. Select **delete**



Form Field Properties

The properties displayed when working with form fields will vary between field types but the following are examples of the types you could see:

General – Name, Tooltip, Common Properties

Appearance – Borders and colours, Text size

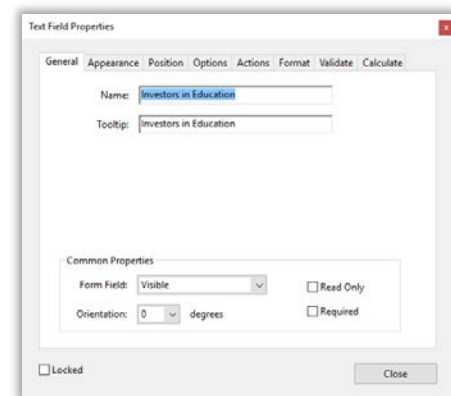
Options – Alignment, default value, character limit

Actions – Set triggers and actions

Format – Various formatting categories to control how text appears e.g. number, percentage, dates and time

Validate – allow validation of entries to prevent incorrect data being entered e.g. number range


Calculate – Use field to perform simple calculations

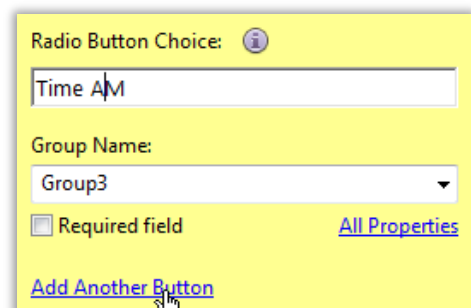


Exercise 3.

Add form fields

1) Add a Radio form field

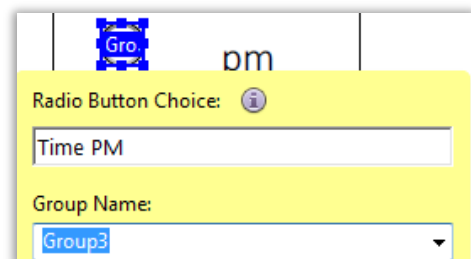
1. Click the **Radio field** button  on the toolbar
2. Click to add form field beside “am”
3. Change choice name to **Time AM**
4. Click **Add Another Button**




5. Click to add form field beside “pm”
6. Change choice name to **Time PM**

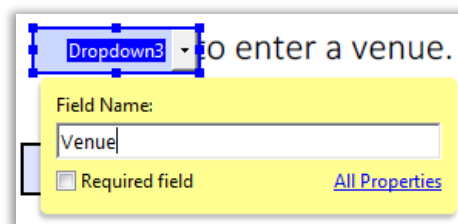
Ensure radio buttons belong to the same group.

7. Click in document to close properties box



2) Add a Dropdown list field

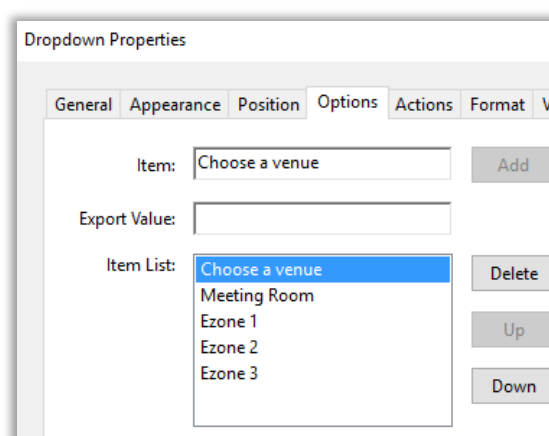
1. Delete the **Venue** field
2. Select the **Add drop down list** button 
3. Click and drag to add form field beside "Venue"
4. **Change** Field Name to **Venue**
5. Click **All Properties**



6. Choose the **Options** tab
7. **Select** the Item field:
 - Type **eZone 1** – Click the **Add** button
 - Type **eZone 2** – Click the **Add** button
 - Type **eZone 3** – Click the **Add** button
 - Type **Meeting room** – Click the **Add** button
 - Type **Choose a venue** – Click the **Add** button
8. Select **Meeting room** – Click the **Up** button to move entry to the top
9. Select **Choose a venue**

Doing this makes it the default choice

10. Click the **Up** button to move entry to the top
11. Click the **Close** button



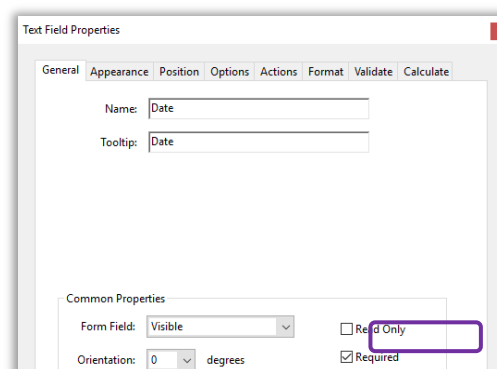
Exercise 4.

Modify fields and properties

1) Edit Date field

To create a date field you place a text field and change the format to recognise dates.

1. Double click the **Date** field
2. Check **Required** box on **General** tab

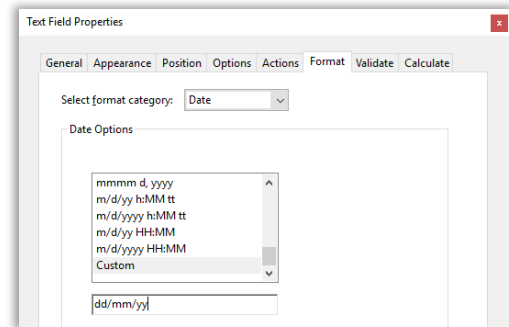


3. Select the **Format** tab
4. Choose **Date** format
5. **Custom** format
6. Enter: **dd/mm/yy**

Entering yyyy will force user to enter the full year as part of a date entry

7. Click **Close**

Required fields will display in red in "edit form" mode.

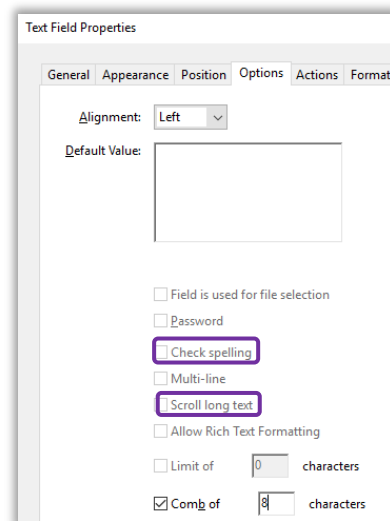


2) Editing field properties

1. Double click the field next to **Member Number**

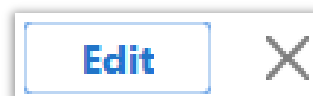
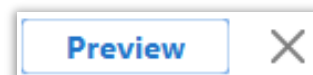


2. Go to the **Options** tab
3. Clear **Scroll long text**
4. Clear **Check spelling**
5. Check **Comb of** and use 8 characters
6. Click on **Close**



3) Preview form fields

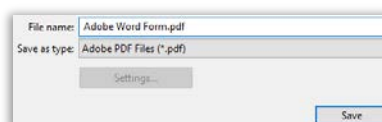
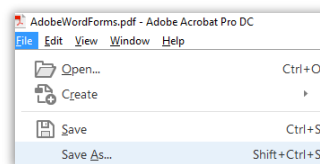
1. Click on **Preview** button to see live form as users
2. Click **Edit** button to return to form editing



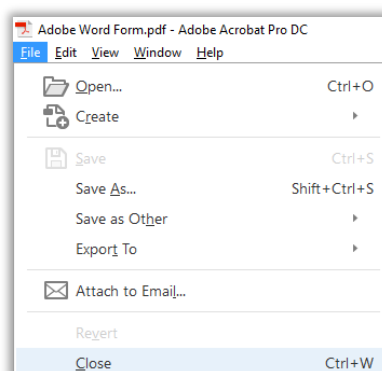
Exercise 5.

Save and close form

1. Click on **File** in menu bar
2. Select **Save As**
3. Specify a location and filename
"Adobe Word Form.pdf"
4. Click on **Save**



5. Click on **File**
6. Select **Close**



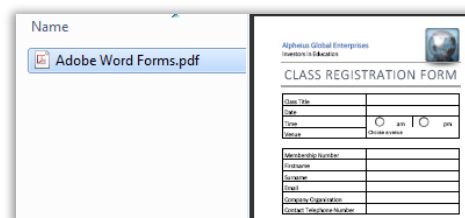
Exercise 6.

Open and edit form

1) Access edit forms mode

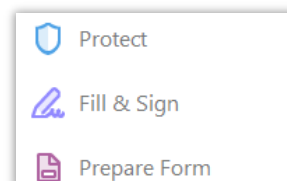
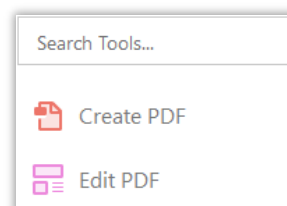
1. Click on **File** in menu bar
2. Select **Open**
3. Navigate to **Adobe Word Form.PDF**
4. Click on **Open**

Your file is presented in **fill-in form** mode.




5. Select **Prepare Form** on the tools pane

This will activate **form editing** mode



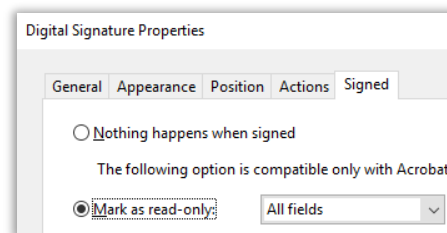
2) Add Signature field

1. Delete the **undefined** field beside Signature
2. Click on the **Digital Signature**  button
3. Click and drag to add form field beside **Signature**



4. Double click on **signature** field
5. Got to **Signed** tab
6. Select **Mark as read-only**


When the signature is added to the form, nothing can be changed

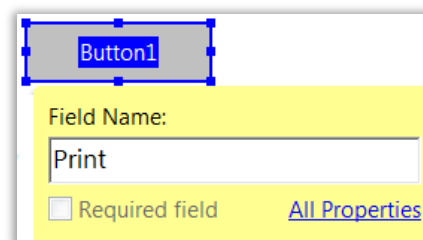


Exercise 7.

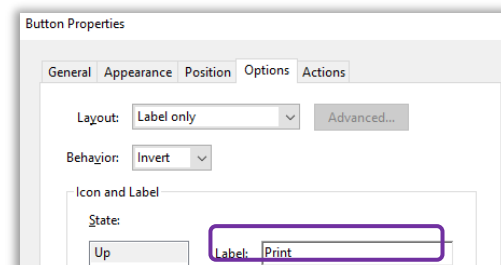
Create interactive buttons

1) New button to Print

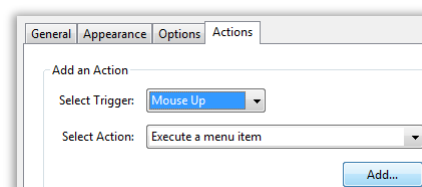
1. Select the **Add a 'print' or 'clear'** button  on the toolbar
2. Click and drag to draw a button field
3. Change the **Field Name** to **Print**
4. Click **All Properties**



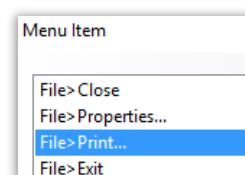
5. Choose the **Options** tab
6. In the Icon and Label section click in the Label area
7. Enter **Print** as the label




8. Select the **Actions** tab
9. Choose **Mouse UP** for Select Trigger
10. Choose **Execute a menu item** for Select Action
11. Click the **Add...** button

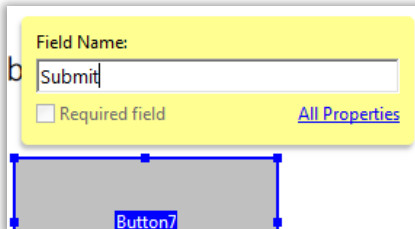


12. Select **File > Print...** from list
13. Click on **OK**
14. Click on **Close**

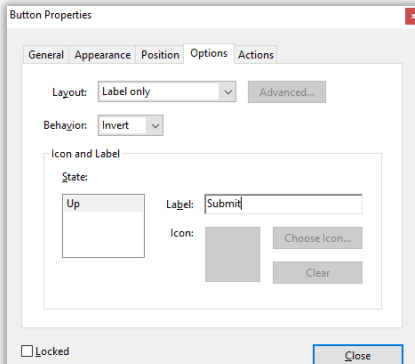


2) New button to Submit

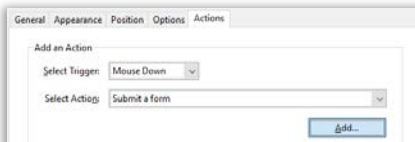
1. Select the **Add a 'print' or 'clear' or other kind of button**  button on the toolbar
2. Click and drag to draw a button field
3. Change the **Field Name** to **Submit**
4. Click **All Properties**



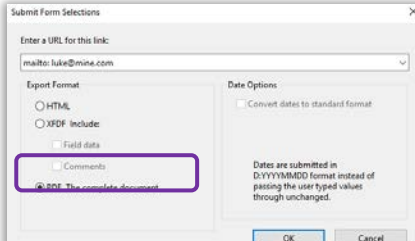
5. Choose the **Options** tab
6. In the Icon and Label section click in the Label area
7. Enter **Submit** as the label



8. Select the **Actions** tab
9. Choose **Mouse Down** for Select Trigger
10. Choose **Submit a form** for Select Action
11. Click the **Add...** button



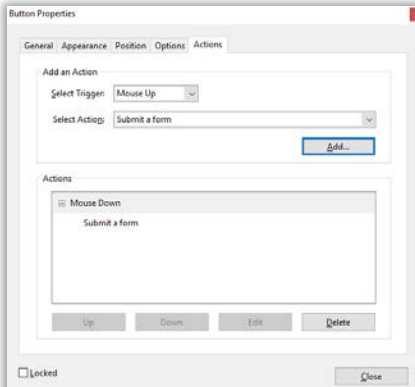
12. In the Enter a URL for this link type **mailto:**'name@domain.com'



13. Select PDF The complete document

The email address link on the button is the email address you want the results mailed to

14. Click **OK**



The selected action will appear in the Actions section

15. Click **Close**

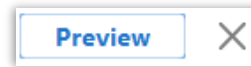
The Submit button will appear

Exercise 8.

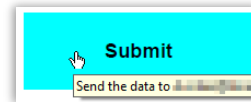
Preview a form

1. On the toolbar at the top of Acrobat find and press the **Preview** button

Your editing options will 'grey out' and the preview button will turn into an Edit button.

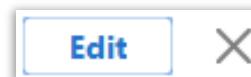


Hover over the submit button and a tooltip for sending the data to the designated email address will appear.



The form has become active even in Preview mode

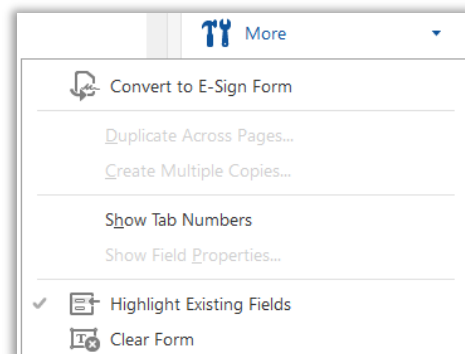
2. Click the **Edit** button to return to Edit mode



3. Click **More** in the tools panel
4. Select **Clear Form**

This should also be done before the form is distributed

5. Click on **Save**

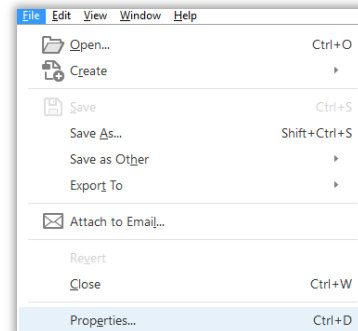


Security and Protection

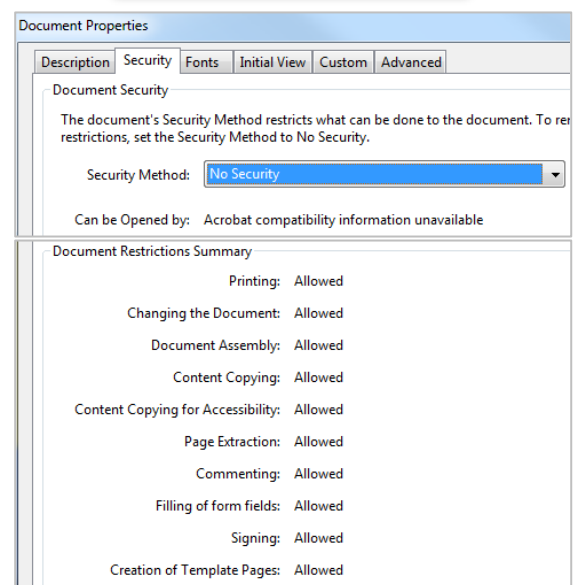
Exercise 9.

Restricting user activities

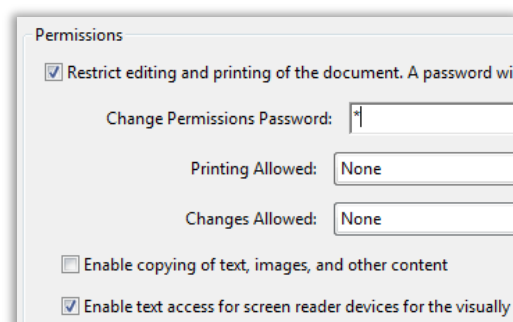
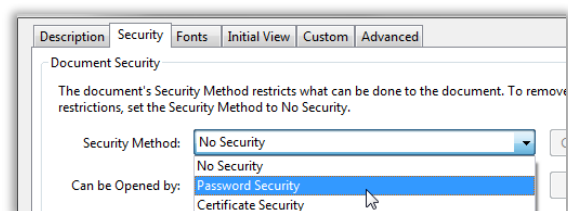
1. Click **File** menu
2. Choose **Properties**



3. Select the **Security** tab

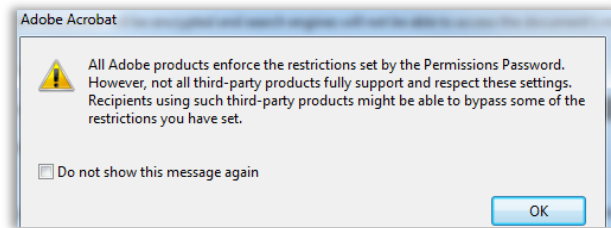


4. Click the drop down arrow next to **Security Method**
5. Choose **Password Security**
6. Go to the **Permissions** area. Place a tick in **Restrict editing and printing**
7. Enter the following settings
 - Change permissions password a
 - Printing allowed **None**
 - Change allowed **None**
 - Clear **Enable copying if necessary**
 - Check **Enable Text Access**
 - Click on **OK**



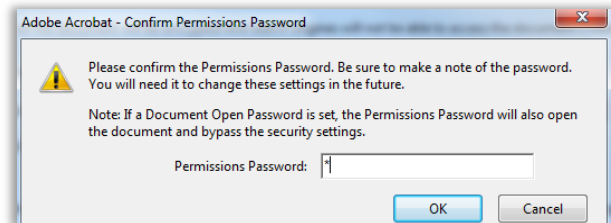
Permissions disclaimer

8. Click on **OK**



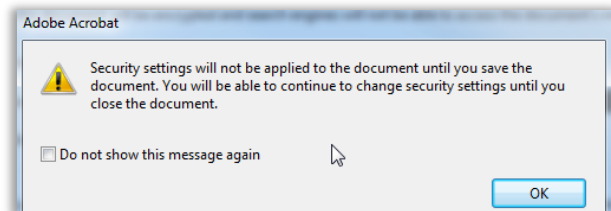
Confirm password

9. Re-enter the password **a**
10. Click on **OK**



Permissions aren't officially set until the file is saved.

11. Click on **OK**



12. Save as **Adobe Word Form 2.pdf**
13. Press **ctrl+w**
14. Open **Adobe Word Form 2.pdf**



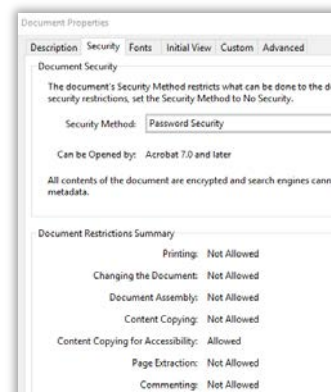
The security restrictions will not apply until document is closed

Check Security

15. Check title bar for **(Secured)**
16. Click the **File** menu
17. Choose **Properties**
18. Select the **Security** tab to check Document Restrictions

Notice most restrictions are now Not Allowed

19. Click on **OK**



Repeat protection with the following settings

- Change permissions password **a**
- Printing allowed **None**
- Change allowed **Fill in Forms**
- Clear **Enable copying if necessary**
- Check **Enable Text Access**
- Click on **OK**

Signing and Certifying

There are two ways of electronically signing a pdf. Signing and Certifying. Signing a pdf means that ***you agree with the contents*** e.g. a contract. Certifying a document means that ***the document can be verified as having come from you***. The processes involved in signing and certifying pdf's are the same.

Signing and certifying a pdf file allows for a verifiable way of proving a document in its current form up to that point.

The ability to sign or certify a pdf requires the creation of a digital ID and a Certificate.

There are 4 steps involved in comprehensively signing and certifying PDF documentation.

1. Create a digital ID
2. Create a certificate from that ID
3. Send certificate, to colleagues, for importing to recognise you as a trusted identity
(The presence of a trusted identity allows acrobat to verify the identify the signer of a PDF document)
4. Sign a document and send

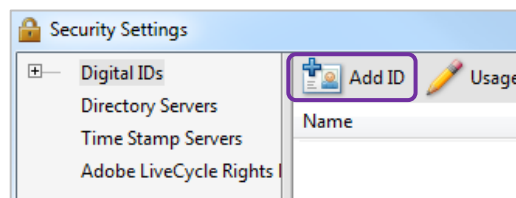
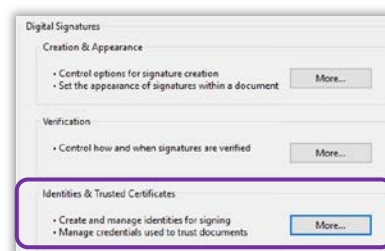
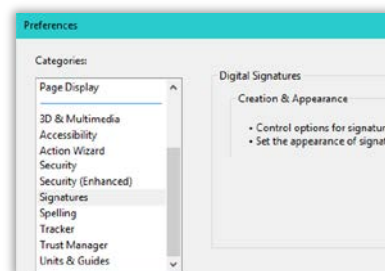
Exercise 10.

Create a digital signature

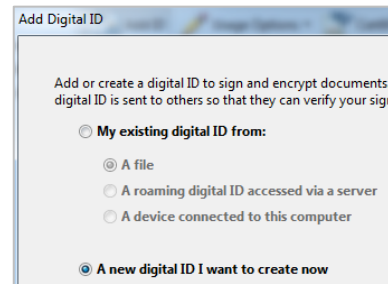
1) Create a digital ID

A digital ID is collection of data that electronically identifies a person. This data is embedded in a signed document to identify the signer.

1. Click **Edit > Preferences...**
2. Select the **Signatures** category
3. Click **More...** button under **Identities & Trusted Certificates**
4. Click **Digital ID's**
5. Click on **Add ID**



6. Select **A new digital ID I want to create now**
7. Click on **Next**



Add Digital ID

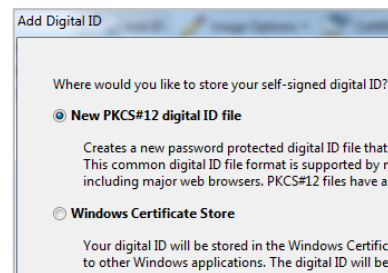
Add or create a digital ID to sign and encrypt documents. digital ID is sent to others so that they can verify your sign

☐ My existing digital ID from:

- ☐ A file
- ☐ A roaming digital ID accessed via a server
- ☐ A device connected to this computer

☒ A new digital ID I want to create now

8. Select **New PKCS#12 digital ID file**
- Digital ID is preferable as a cross-platform industry standard
9. Click on **Next**



Add Digital ID

Where would you like to store your self-signed digital ID?

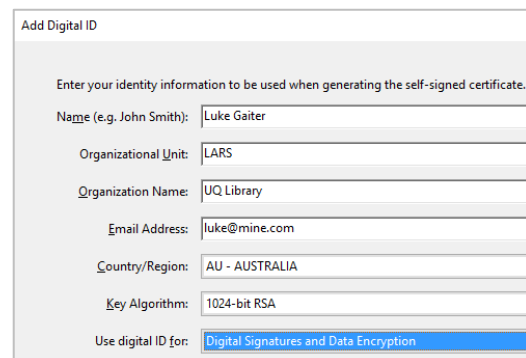
☒ New PKCS#12 digital ID file

Creates a new password protected digital ID file that
This common digital ID file format is supported by m
including major web browsers. PKCS#12 files have a

☐ Windows Certificate Store

Your digital ID will be stored in the Windows Certifica
to other Windows applications. The digital ID will be

10. Complete as much information as required
11. Click on **Next**



Add Digital ID

Enter your identity information to be used when generating the self-signed certificate.

Name (e.g. John Smith): Luke Gaiter

Organizational Unit: LARS

Organization Name: UQ Library

Email Address: luke@mine.com

Country/Region: AU - AUSTRALIA

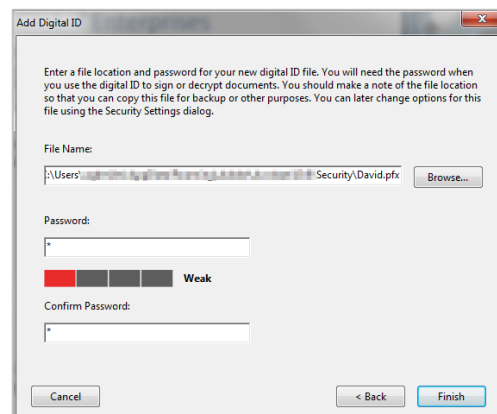
Key Algorithm: 1024-bit RSA

Use digital ID for: Digital Signatures and Data Encryption

12. Accept default storage location and file name

Password needs to be supplied every time you sign a document and must be at least 6 characters long
For training purposes the password 'abcdef' is acceptable but please note this is not a good idea in real life.

13. Click on **Finish**



Add Digital ID

Enter a file location and password for your new digital ID file. You will need the password when you use the digital ID to sign or decrypt documents. You should make a note of the file location so that you can copy this file for backup or other purposes. You can later change options for this file using the Security Settings dialog.

File Name:
\\Users\... Security\David.pfx Browse...

Password:
* Weak

Confirm Password:
*

Cancel < Back Finish

You will be returned to the Security Settings dialog box and your digital ID is created and stored

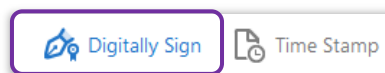
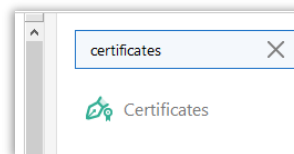
14. Close the **Security Settings** box

Add ID Usage Options Certificate Details Export Refresh Remove ID		
Name	Issuer	Storage Mechanism
Luke Gaiter <luke@mine.com>	Luke Gaiter <luke@mine.com>	Digital ID File

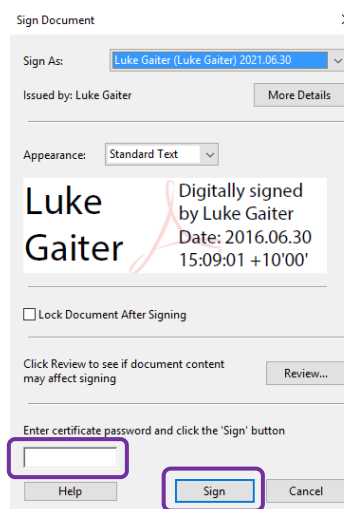
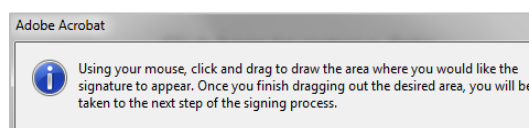
Exercise 11.

Digitally sign a document

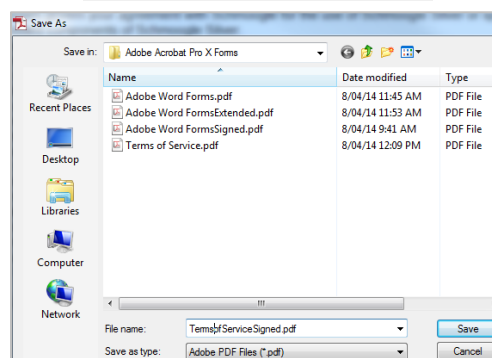
1. Open **Terms of Service.pdf**
2. Search in the **Tools** panel for **Certificates**
3. Select **Certificates**
4. Click **Digitally Sign** from the **Certificates** menu at the top of your document
5. Click on **OK**
6. Click and drag to add signature location



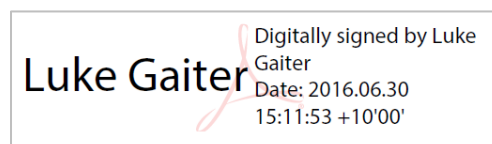
7. Select a **digital ID**
8. Enter the appropriate **password**
9. Click **Sign**



10. Add filename "**Terms of Service Signed.pdf**"
11. Click on **Save**



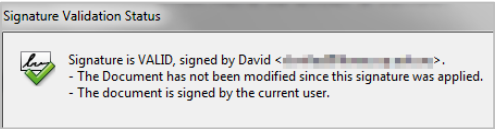
12. Digital signature appears on the document



A banner will display after digital signature is placed



Clicking the signature also shows if the signature is valid



.....

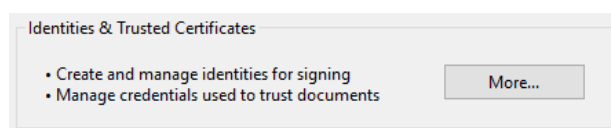
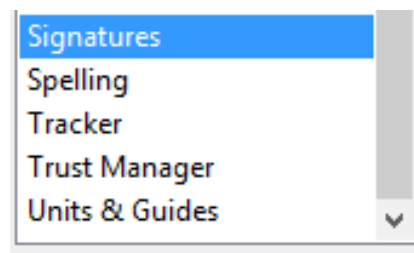
.....

.....

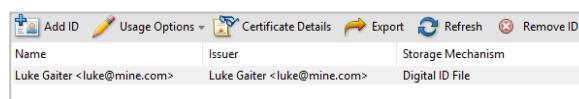
2) Create a certificate

Once you have created a digital ID you can then create a certificate that contains the digital ID information. The certificate can be sent to others, who then imports it into their copy of Acrobat as a trusted identity.

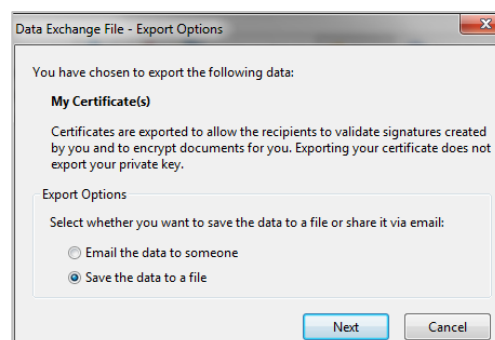
1. Click **Edit > Preferences...**
2. Select the **Signatures** category
3. Select **More...** under **Identities & Trusted Certificates**



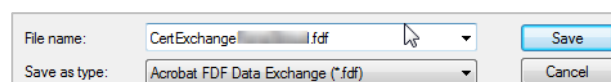
4. Click **Digital ID's**
5. Select **ID**
6. Click **Export** button



7. Select **Save the data to a file**
8. Click on **Next**



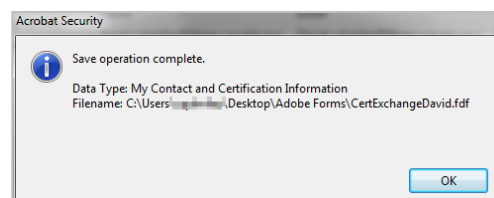
9. Specify a name and location for the file
The file is saved in an **Acrobat FDF** format



10. Click on **Save**

Save message appears

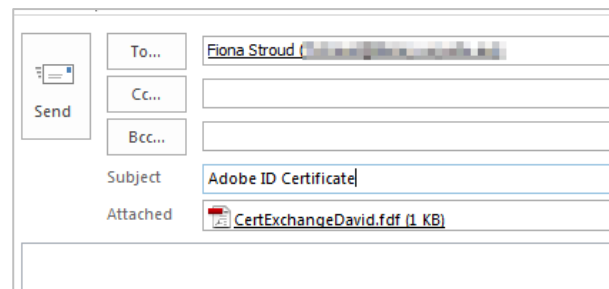
11. Click on **OK**



12. Repeat step 6 and select **Email the data to someone.**

Send Certificate

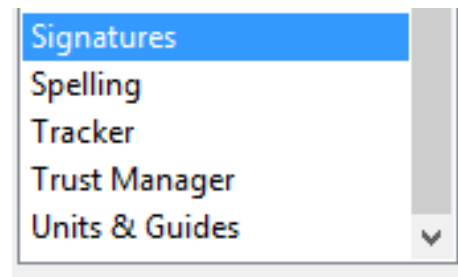
- Send the certificate as an attachment to recipients who need to verify your signature
- This will have to be imported by recipient to recognise your signed documents as a trusted identity



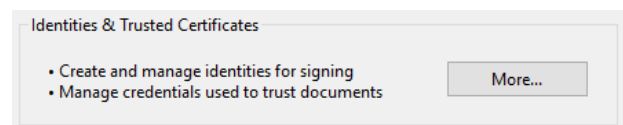
3) Trusted Identities

When you receive a certificate from another person you must import the certificate into Acrobat as a trusted identity. This will allow Acrobat to recognise signed or certified documents from the person whose certificate you have imported. This can be done from the attachment received or via Acrobat Pro.

1. Click **Edit > Preferences...**
2. Select the **Signatures** category
3. Select **More...** under **Identities & Trusted Certificates**

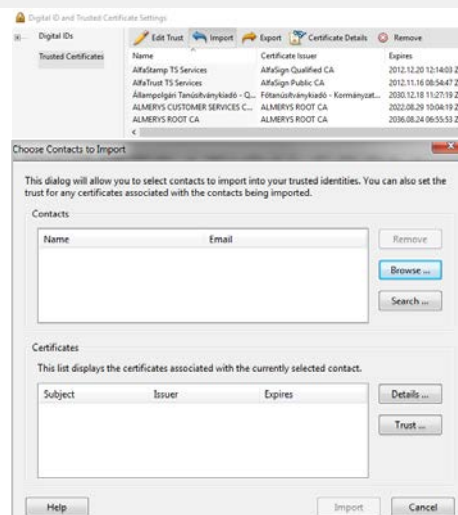


4. Click on **Trusted Certificates...**
5. Click on **Import**



Navigate to where the certificate is stored

6. Click **Browse**

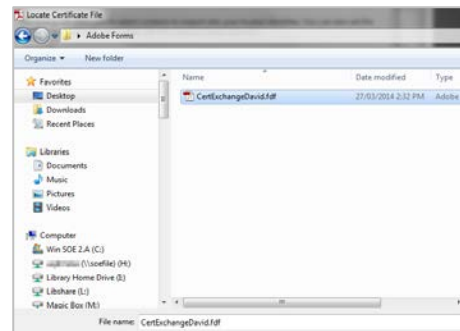


7. Select the ID file to import

8. Click on **Open**

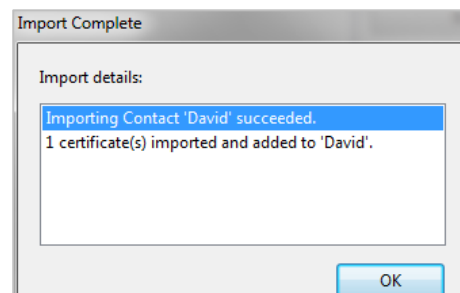
You are returned to Choose Contacts to Import dialog box

9. Choose **Import**



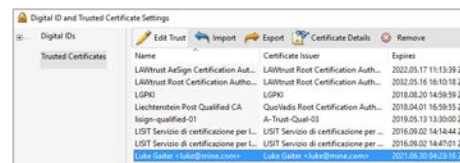
Presented with an Import Complete dialog box

10. Choose **OK**



Returned to Manage Trusted Identities dialog box. You will need to specify what the new trusted identity can do.

11. Click **Edit Trust**



12. Tick **Use this certificate as a trusted root** box

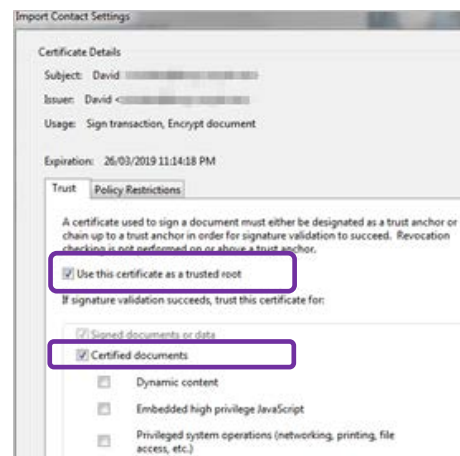
13. Tick **Certified documents** box

You should **NOT** tick the dynamic content, embedded Java script and privileged system operations check boxes. Doing so would potentially allow validation of documents that may change after they have been signed.

14. Click **OK** to return to Edit Contacts

15. Close **Digital ID and Trusted Certificate Settings**

16. Click **OK** to complete

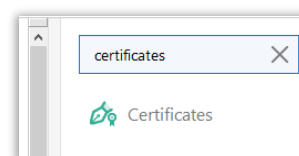


4) Sign document

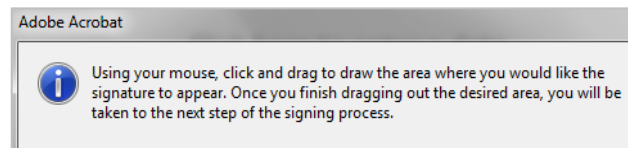
17. Open **Terms of Service.pdf**

18. Search in the **Tools** panel for **Certificates**

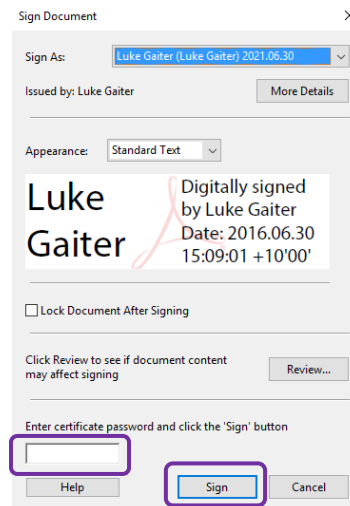
19. Select **Certificates**



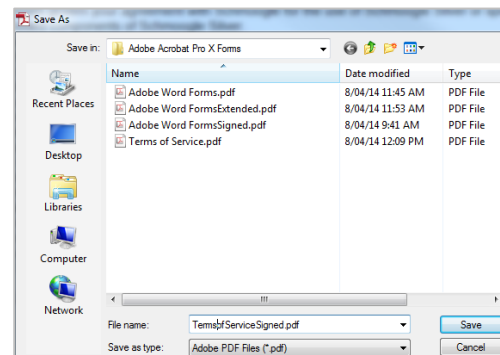
20. Click **Digitally Sign** from the **Certificates** menu at the top of your document
21. Click on **OK**
22. Click and drag to add signature location



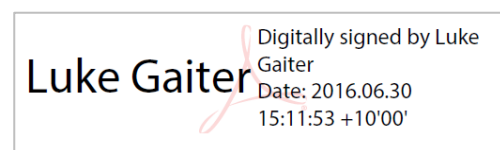
23. Select a **digital ID**
24. Enter the appropriate **password**
25. Click **Sign**



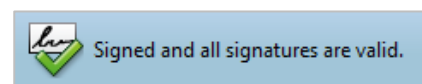
26. Add filename "**Terms of Service Signed.pdf**"
27. Click on **Save**



28. Digital signature appears on the document



A banner will display after digital signature is placed



Clicking the signature also shows if the signature is valid



Distribute and Collate Forms

There are 3 main steps in dealing with Acrobat forms successfully

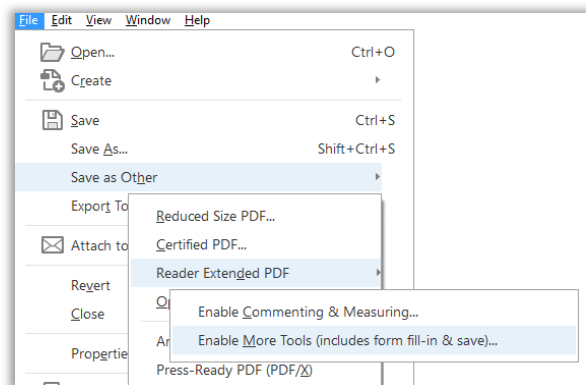
- 1) **Distribute** – send form to recipients
- 2) **Respond** – complete PDF form via Adobe Acrobat or Adobe Reader
- 3) **Collate** – collect and track responses

Exercise 12.

Reader Extended PDF

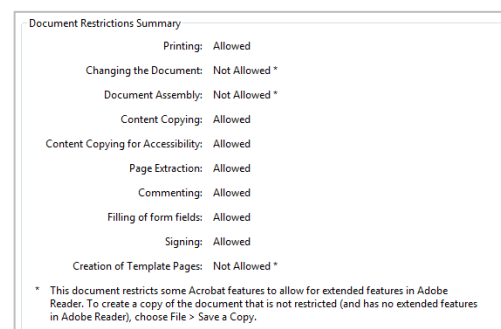
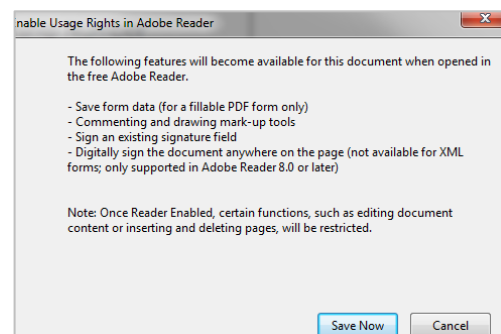
Without a copy of Acrobat Pro, ordinarily it is not possible to save filled in form information. However, it is possible to extend this functionality to people with a copy of Acrobat Reader 8 or later by saving the form as a reader extended PDF

1. Open **Adobe Word Form.pdf**
2. Click **Edit PDF** from the **Tools** pane
3. Enter password
4. **File > Save As Other> Reader Extended PDF > Enable More Tools (includes form fill-in & save)....**



Enable usage rights in Adobe Reader opens

5. Click **Save Now**
6. Save as **Adobe Word Form Extended.pdf**
7. Click **File > Properties** to see what restrictions have been added
8. Click on **Ok**
9. Click **File > Close**



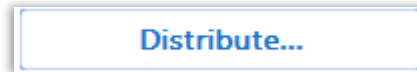
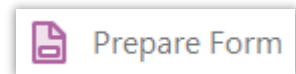
Exercise 13.

Distribute, complete and track forms

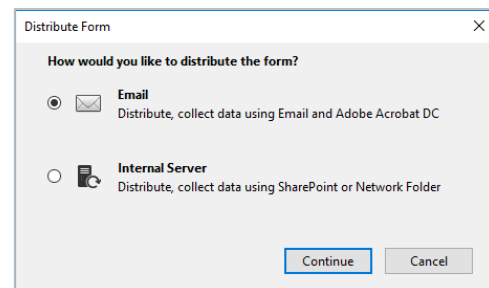
1) Distribute via email

1. Open **Adobe Word Form.pdf**
2. Select **Prepare Form** on the Tools pane
3. Click **Distribute** in the bottom right of the window

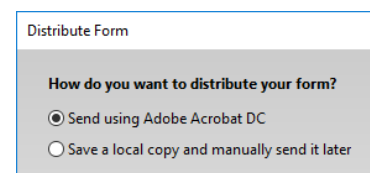
You may be prompted to save your form prior to distributing



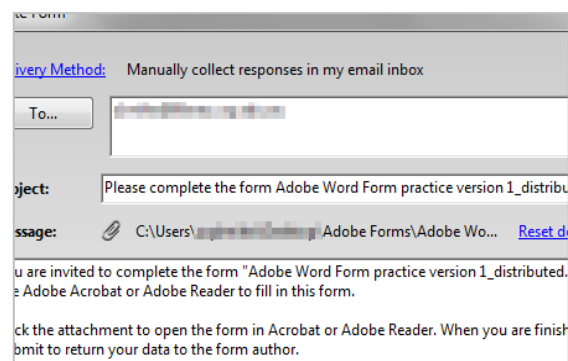
4. Select **"Email"**
5. Click on **Continue**



6. Select **"Send it using Adobe Acrobat"**
7. Click on **Next**

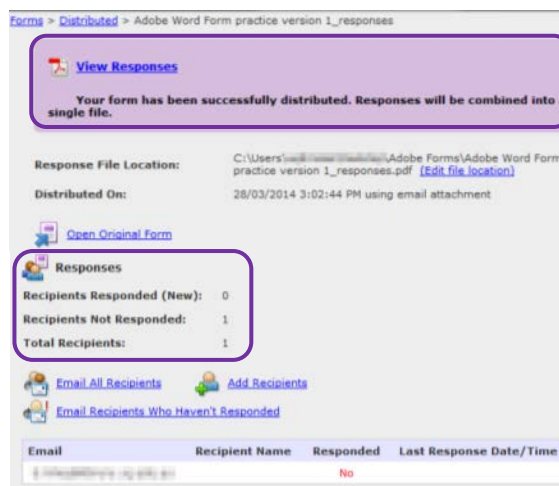


8. Enter the recipients addresses
9. Ensure the box **"Collect name and email from recipients to provide optimal tracking"** is checked
10. Click on **Send**



Tracker dialogue box opens when form has been sent successfully. It also allows the sender to see if recipients have responded to a form

11. Close **Tracker** box



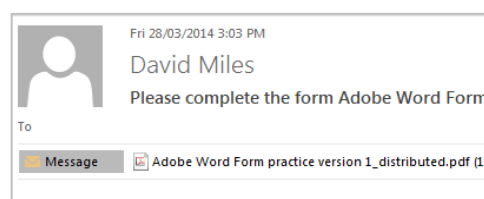
2) Respond to a form request


A Recipient will receive an email with the form as an attachment.



1. Go to email **inbox**
2. Open **email attachment**

Recipients open the form with instructions to complete the form and use the submit button

When distributed, Acrobat scans the form and if no submit button is found a submit button appears at the top right of the form



 Please fill out the following form. When finished, click Submit Form to return the completed form.

 Highlight Existing Fields  Submit Form

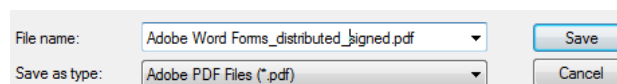
3. Complete All form fields

Complete the signature field last as adding it can make the document read-only. If a required field is empty you will be locked out and unable to submit or make any other changes

4. Add Digital Signature
 - Click **Signature** field
 - Select **Signature** at Sign As
 - Enter **password**
 - Click on **Sign**

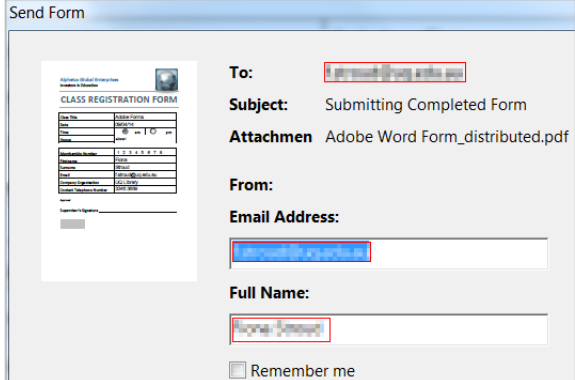


5. Save file as **Adobe Word Form_Distributed_Signed.pdf**
6. Click on **Save**



7. Click on **Submit** button

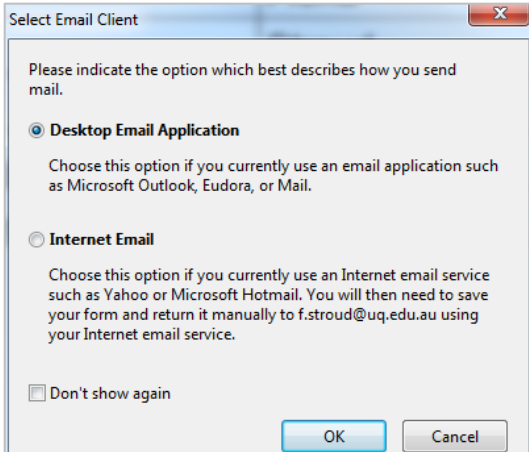
Dialogue box opens to confirm response and return details



The 'Send Form' dialog box contains a preview of the 'CLASS REGISTRATION FORM' on the left. On the right, it has fields for 'To:' (f.stroud@uq.edu.au), 'Subject:' (Submitting Completed Form), 'Attachmen' (Adobe Word Form_distributed.pdf), 'From:' (f.stroud@uq.edu.au), 'Email Address:' (f.stroud@uq.edu.au), and 'Full Name:' (Fiona Stroud). There is a 'Remember me' checkbox at the bottom.

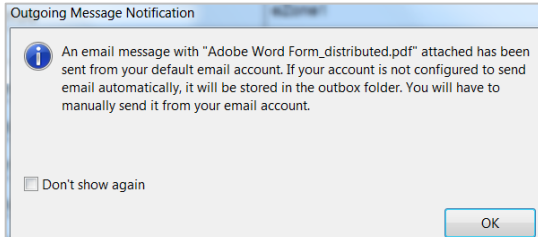
Indicate how you would like to send the response

8. Click on **OK**



The 'Select Email Client' dialog box asks the user to indicate the option which best describes how they send mail. It has two radio button options: 'Desktop Email Application' (selected) and 'Internet Email'. The 'Desktop Email Application' option includes instructions to choose this if using an email application like Microsoft Outlook, Eudora, or Mail. The 'Internet Email' option includes instructions to choose this if using an Internet email service like Yahoo or Microsoft Hotmail. There is a 'Don't show again' checkbox and 'OK' and 'Cancel' buttons at the bottom.

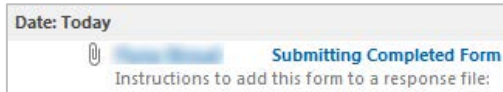
A message box will pop up to acknowledge response has been sent. Check message has gone as you may need to send it manually.



The 'Outgoing Message Notification' dialog box informs the user that an email message with 'Adobe Word Form_distributed.pdf' attached has been sent from their default email account. It includes instructions on what to do if the account is not configured to send email automatically. There is a 'Don't show again' checkbox and an 'OK' button at the bottom.

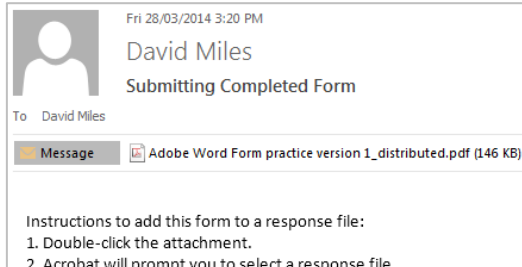
3) Track Responses from recipients

1. Go to email inbox



The email inbox snippet shows the date 'Date: Today' and a subject line 'Submitting Completed Form'. Below the subject line, it says 'Instructions to add this form to a response file:'.

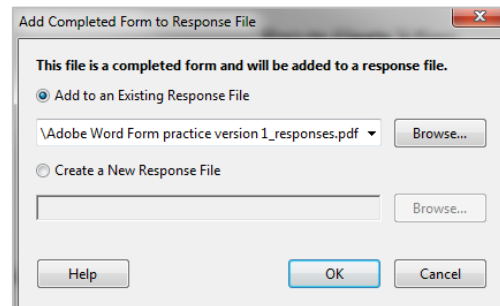
2. Open email and attachment



The email preview snippet shows the sender's name 'David Miles' and the subject 'Submitting Completed Form'. It includes a 'Message' tab and a list of attachments: 'Adobe Word Form practice version 1_distributed.pdf (146 KB)'. Below the attachments, it says 'Instructions to add this form to a response file:' followed by two steps: '1. Double-click the attachment.' and '2. Acrobat will prompt you to select a response file.'

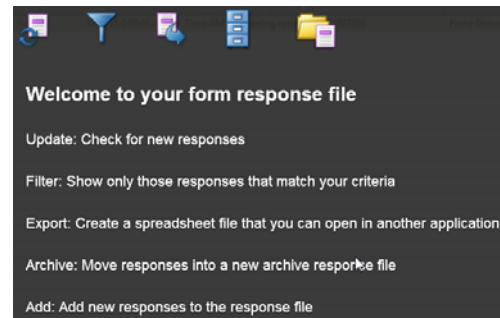
3. Choose a response file

Adobe should find the original file if you are the one who sent it out originally



You may be presented with a welcome screen

4. Click on **Get Started**

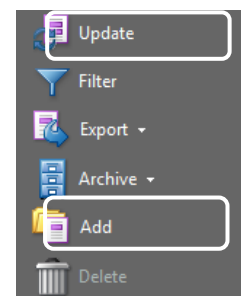


Responses are shown in a table style layout.

	From	Received Date	Class Title
	David Miles	4/04/2014 1:00:54 PM	How to create a f

Response file gives several options for managing responses

Update can only be used on server based forms
Add is used for email based forms

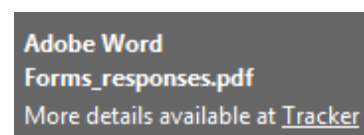
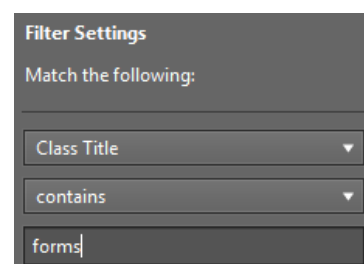


4) View and manipulate responses

1. Click on **Filter**
2. Select class title field
3. Enter "**forms**"
4. Click on - **Clear All**
5. Click on **Done**
6. Click **Tracker** link

The tracker will allow you to view other details from responses and contact recipients who haven't yet responded.

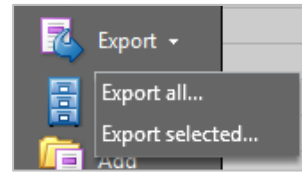
7. Close **Tracker** Dialogue box



Exercise 14.

Export form results for analysis

1. Click on **Export** in responses file
2. Select **Export all ...**



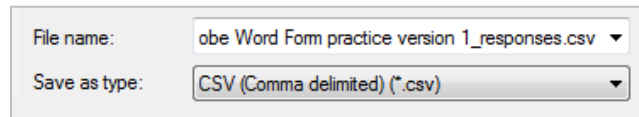
CSV format is default and can be easily read by Microsoft Excel

3. Choose destination
4. Click **Save**

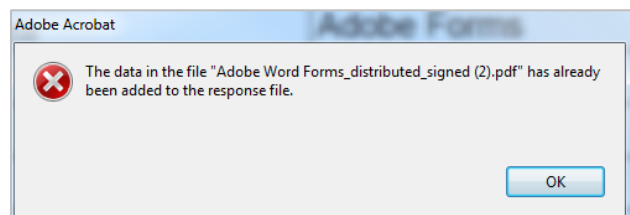
A message appears to indicate success

5. Press **CTRL +W** to close response file

You may be prompted to save **responses.pdf**



If you accidentally try to add a response more than once a message will display.



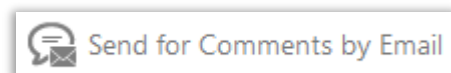
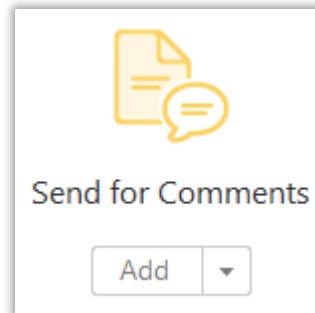
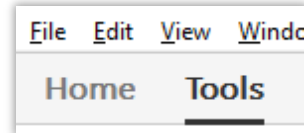
Reviewing PDF's

Exercise 15.

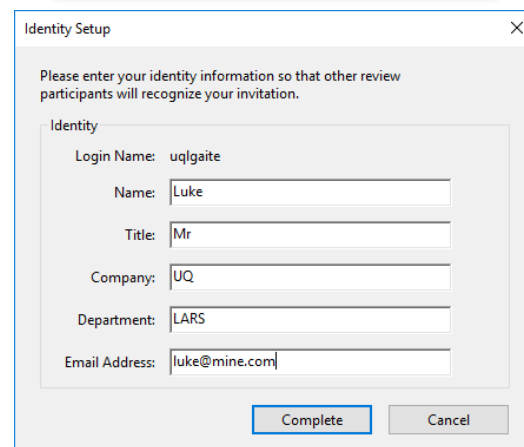
Reviewing PDF documents

1) Send invite for review

1. Open **AdobeReviewFile.pdf**
2. Open the **Tools** Panel
3. Click **Send for Comments**
4. Select **Send for Comments by Email**



5. Fill out details before clicking on **Complete**
6. Click **Next**



Identity Setup

Please enter your identity information so that other review participants will recognize your invitation.

Identity

Login Name: uqlgaite

Name: Luke

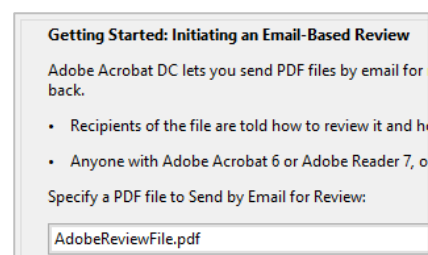
Title: Mr

Company: UQ

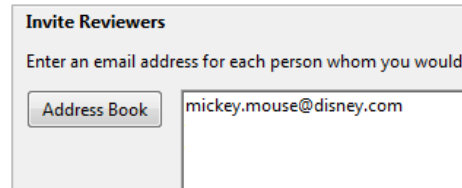
Department: LARS

Email Address: luke@mine.com

Complete Cancel



7. Enter email addresses of recipient for review
8. Click on **Next**



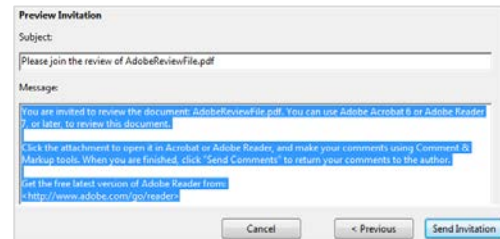
Invite Reviewers

Enter an email address for each person whom you would

mickey.mouse@disney.com

A sample review email is displayed

9. Click on **Send Invitation**



Preview Invitation

Subject: Please join the review of AdobeReviewFile.pdf

Message:

You are invited to review the document: AdobeReviewFile.pdf. You can use Adobe Acrobat 6 or Adobe Reader 7 or later to review this document.

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

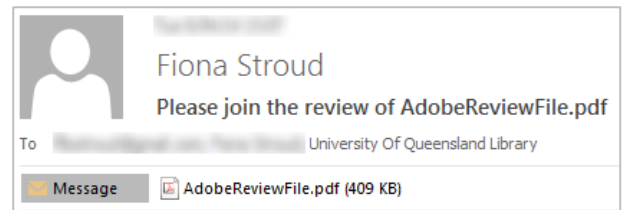
Get the free latest version of Adobe Reader from: <http://www.adobe.com/go/readers>

2) Respond to a review request

A Recipient will receive an email with the PDF file as an attachment.

1. Go to email inbox
2. Open email message and attachment

Please join the review of AdobeReviewFile.pdf



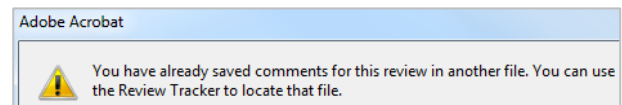
Fiona Stroud

Please join the review of AdobeReviewFile.pdf


To: [mickey.mouse@disney.com](#) University Of Queensland Library

A message box may display.


3. Click on **OK**



Adobe Acrobat

 You have already saved comments for this review in another file. You can use the Review Tracker to locate that file.

The review document will open and a message banner will display to click Merge comments after editing

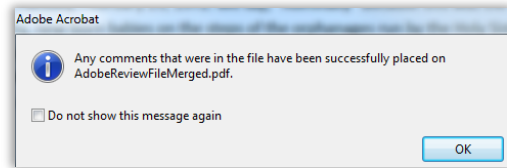
 Click Merge Comments to merge all of the comments you just received into the tracked PDF file you sent for email-based review.

4. Open **Comments** panel
5. Use **Annotations** to add comments



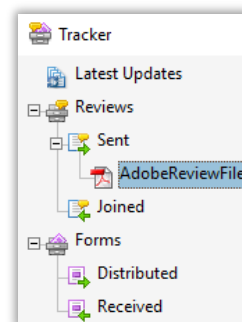
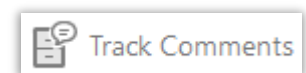
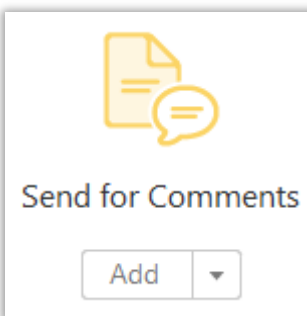
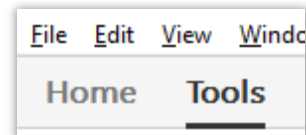
6. Click on **Merge Comments** in banner

A message box will confirm successful merge



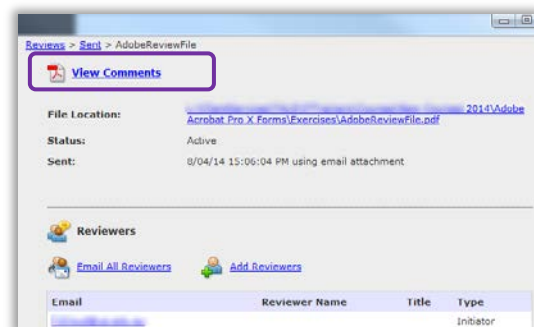
3) Track reviewers

1. Open **AdobeReviewFile.pdf**
2. Open the **Tools** Panel
3. Click **Send for Comments**
4. Select **Track Comments**

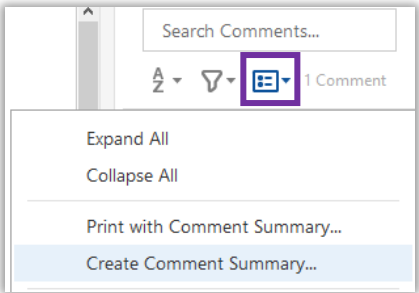


Tracker window opens with details of each reviewer

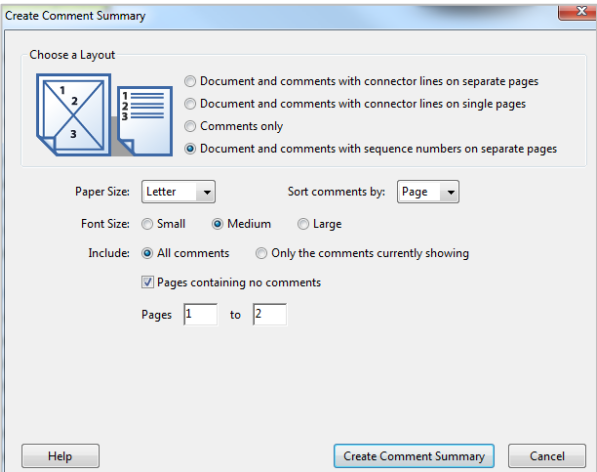
5. Click on **AdobeReviewFile** under the **Sent** Reviews
6. Click on **View Comments** to see merged comments in PDF file



- 7. Click on **Options** button
- 8. Select **Create Comment Summary**



- 9. Click on **Create Content Summary**



The document summary will be created for printing or saving

Summary of Comments on AdobeReviewFileMerged.pdf				
Page: 1				
Number: 1	Author: uqfstrou	Subject: Polygon	Date: 8/04/14 15:39:46 PM	
Number: 2	Author: uqfstrou	Subject: Polygon	Date: 8/04/14 15:23:11 PM	
Number: 3	Author: uqfstrou	Subject: Confidential	Date: 8/04/14 15:40:54 PM	
Number: 4	Author: uqfstrou	Subject: Oval	Date: 8/04/14 16:03:29 PM	
Number: 5	Author: uqfstrou	Subject: Line	Date: 8/04/14 16:02:56 PM	
Number: 6	Author: uqfstrou	Subject: Highlight	Date: 8/04/14 15:39:53 PM	
Number: 7	Author: uqfstrou	Subject: Inserted Text	Date: 8/04/14 15:22:36 PM	
Number: 8	Author: uqfstrou	Subject: Highlight	Date: 8/04/14 15:23:54 PM	
Number: 9	Author: uqfstrou	Subject: Underline	Date: 8/04/14 15:22:41 PM	
Number: 10	Author: uqfstrou	Subject: Inserted Text	Date: 8/04/14 15:40:10 PM	
Number: 11	Author: uqfstrou	Subject: Polygon	Date: 8/04/14 16:02:49 PM	