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Gather and organize feedback faster and easier with Acrobat 7.0 Professional

Get a Grip on Project Reviews

Acrobat 7.0 Professional makes it simple to request and incorporate feedback from your project team

by Michael Dakan

Many processes in an AEC office require that documents be distributed to several parties for review and commenting or approval before being finalized and released for general distribution. Adobe® Acrobat® 7.0 Professional not only simplifies reviewing and commenting, it helps improve team collaboration and productivity.

As discussed in the <u>past two editions of Acrobat Insider</u>, you can use Adobe Acrobat 7.0 Professional to package a group of documents of different types and from a variety of sources into one Adobe PDF. Then use Acrobat 7.0 Professional to turn on commenting functionality and initiate a review and markup process that can include anyone using the free Adobe Reader® 7.0.

In this edition, I'll discuss using the tools that are built into Acrobat 7.0 Professional to initiate and manage a review cycle. You can set up a review cycle using an e-mail-based process or a Web browser-based process.

Of course, if a set of documents requires review by just a few people, you could manually attach an Adobe PDF to an e-mail and send it to reviewers to mark up and return via e-mail, then manually transfer any comments back to the original document. But did you know Acrobat 7.0 Professional has built-in tracking and management tools to automate this process, facilitating easier, more efficient project reviews? It's the preferred process to use!

E-mail vs. Browser-based Reviews

An e-mail-based review is the easier option to set up and manage, but a browser-based review lets reviewers make comments online, and comments become immediately available to other reviewers. OCTOBER 2005

IN THIS ISSUE

- Manage more efficient review and commenting
- This month's tips: Quick replies to review comments; the power of toolbar buttons

IN THE NEXT ISSUE

Acrobat Insider provides how-to advice and tips about specific features of Acrobat 7.0 Professional.

Next time:

Easily design Adobe XML-based PDF forms.

SUBMIT A TIP

We welcome your tips for AEC-specific uses of Acrobat 7.0 Professional. If we publish your tip, we'll send you a *Cadalyst* t-shirt. **E-mail-based reviews.** E-mail-based reviews require that the review initiator have Adobe Acrobat 7.0 Professional, reviewers have Adobe Reader 7.0 and all parties have e-mail. In an E-mail-based review, you can enable an Adobe PDF for commenting. Once reviewers return comments, you can automatically merge the comments into a single PDF and Acrobat maintains tracking information.

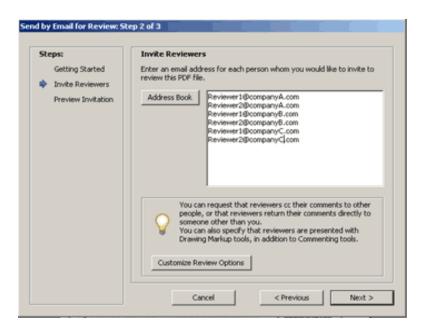
Browser-based reviews. For browser-based reviews, all review participants must have Acrobat 7.0 and Internet access, and you'll need a server accessible by all reviewers where you can centrally store comments. Browser-based reviews are ideal for project reviews that will benefit from participant give-and-take: Reviewers make comments online and those comments become immediately available to all other reviewers, who can then reply and discuss changes.

Setting Up an E-mail-based Review and Comment Process

To set up an e-mail-based project review and markup process, first <u>create the PDF to be reviewed</u> and <u>enable it for commenting</u>, then follow these simplified steps.

In Acrobat 7.0 Professional, open the Adobe PDF file you're targeting for review. Select Send By E-mail for Review, which is available a few different ways: by clicking on the Send for Review toolbar button, using the File menu option or using the Comments menu option.

A Wizard appears to walk you through the process. Fill in the dialog box fields, make changes and additions to the e-mail invitation text and send the invitations.



Step 2 of the Send By E-mail for Review process lets you specify e-mail addresses of project review participants.

Reviewers return the marked-up Adobe PDF to you via e-mail. Then you can automatically incorporate all feedback into the original Adobe PDF, as outlined below.

Setting Up a Web Browser-based Review and Comment Process

REQUEST A TIP

Have a question about Adobe Acrobat 7.0 Professional? A suggestion for a future edition of *Acrobat Insider*? Send it in; we'll address the most popular requests in upcoming issues.

LEARN MORE

Find out more about how the Adobe Acrobat family of products can streamline processes, improve document security and more at Adobe's AEC Web site.



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NEW!!

The latest version of **Photoshop** has arrived, with groundbreaking new features for AEC professionals!

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As noted above, all participants in a browser-based review must have Acrobat 7.0 and Internet access, and you'll need to establish a server location for the PDF file and the comments repository where all reviewers have read/write access, which might require the assistance of an IT administrator. (The browser-based review process won't work with Adobe Reader 7.0, and Acrobat Professional 7.0 cannot enable reviewer commenting for a browser-based review).

To initiate this process, open the PDF to be reviewed and select Upload for Browser-based Review, which is available a few different ways: by clicking on the Send for Review toolbar button, using the File menu option or using the Comments menu option. A Wizard appears to guide you through the set-up process. Reviewer commenting is enabled by default as long as engineering mark-up tools are checked in the Wizard.

Reviewers will receive an e-mail message with an attachment that opens the Adobe PDF file and configures settings to upload comments to the specified comments repository. All comments made online become immediately available to all review participants. For detailed information about this process, consult the Help in Acrobat 7.0. Press F1 and search for "Setting up a browser-based review."

Incorporating Review Comments Into the Original Adobe PDF

As the initiator of an e-mail-based review, you will receive reviewers' comments in e-mail attachments. When you open those attachments, you can incorporate those comments into the master Adobe PDF document with one click — it's fast and easy! (Or, if you prefer, open a separate copy of the Adobe PDF file or postpone the process.)

In a browser-based review, you can view the comments in the central repository by opening the original Adobe PDF in your browser, or you can save a copy of the Adobe PDF with all the comments to a local hard drive using the browser's Save command.

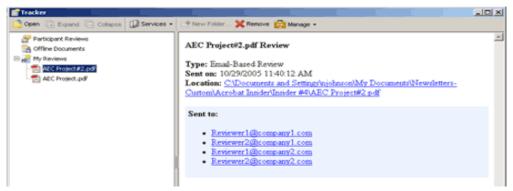
Further details about how to incorporate review comments are provided in Acrobat's Help. Press F1, then search for "Receiving comments" to display step-by-step instructions.

Incorporating Review Comments Into Original Word, AutoCAD Files

If you wish, you can easily and automatically incorporate reviewer comments back to original Microsoft® Word and AutoCAD® files. For full details, press F1 and search for "Exporting comments to a Word document (Windows)" and "Exporting markups to an AutoCAD drawing."

Using the Tracker Feature

All reviews initiated in Adobe Acrobat 7.0 Professional are added to Tracker, found under the Comment & Markup toolbar button, the Send for Review toolbar button or the Comments menu. Think of Tracker as your home for managing all Adobe PDF reviews in progress. Reviews you initiated are listed under My Reviews. Reviews that have been sent to you as an invited participant are listed under Participant Reviews.



The Tracker function in Acrobat 7.0 Professional keeps tabs on all pending reviews of Adobe PDF documents.

Tracker lets you set the status of a review document or delete it. Options under the Manage toolbar button in Tracker are available only to the review initiator and include: E-mail All Participants, Send a Review Reminder and Invite Additional Participants.

As you can see, Acrobat 7.0 Professional is more than just an easy way to combine and e-mail files. It saves time in managing reviews, helps keep a project on track and makes it easy for team members to participate in reviews, even if they don't own Acrobat 7.0 Professional. Using this powerful tool, AEC professionals can take control of the review process and manage feedback in ways never before possible.

Tips and Tricks

Reply to Comments with a Click

As the review initiator, you can e-mail replies to comments and questions received from reviewers. Right-click on a comment in the marked-up Adobe PDF to bring up the context menu, then click Reply. This feature maintains all related comments and conversation in an easily recovered thread.

Feature-Packed Toolbar Buttons

Initiating commands from the toolbar buttons is quick and easy, and often presents additional options, such as the abbreviated, context-sensitive Help window that offers quick reminders, in a step-by-step format, about how to complete the relevant task.

About the Author

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