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Why use Word?

Word is best used when you want your students to be able to add to or alter the Word document (for whatever reason).

Why use PDF?

There are a number of reasons why you might choose to convert your documents into a PDF.

- When optimized for fast web view the files are smaller and load more quickly than a Word document.
- PDF documents retain the appearance of your original documents, so you don't need to worry about losing the document quality when you convert files to PDF.
- Acrobat Reader is a free download off the Internet, so if your viewers don't have Microsoft word, they can still access your document with the layout and formatting that you intended them to view it with.
- You can keep people from being able to alter/edit the information in your document. (Might be useful)
- To stop people from being able to copy and paste information from your document. (Useful if you have sensitive material in your document)
- To restrict access to the document by setting up a password requirement.

Finally, remember that Adobe PDF documents are maximized for document distribution. Although you can do limited editing in a PDF document (delete a page or correct a misspelled word, for example), **Acrobat is not an authoring application**. If you need to make extensive changes to a document, it's best either to edit the source file or, if the source file isn't available, to convert the PDF document to .rtf, .doc, or another format for editing.

Don't have Acrobat Writer?

If you don't have access to Acrobat Writer, there are some free downloadable programs that can create PDF's by using the print command. Here are just two choices:

- CutePDF Writer:
<http://www.acrosoftware.com/Products/CutePDF/writer.asp>
- PDF995 - has an editor that allows bookmarks to be added, pages to be extracted, deleted, etc: <http://www.pdf995.com/>

(Little Bit of Trivia: there is a program that will convert your PDF to Word, Excel, HTML and ASCII text and keep your layout, font choice and size. It's called ABBY PDF Transformer and runs as a Plug-in from Microsoft Applications such as Word, Excel, etc. The program you buy is called ABBY FineReader and can also make scanned magazine articles and the like editable by converting them into a Word document. Unfortunately it's \$159 US)

Basic Design

Layout

A simple layout is often the best when it comes to designing informational documents. If too much is happening on a page it can be confusing (i.e., if you have many pictures and too many columns and no real layout). If you see a layout that you like, it might be worthwhile trying to recreate it, but with your own material.

Font Choice

If your document is to be viewed on the web, then a sans serif font like Verdana is a good choice. Sans serif fonts are best for the web because serifs don't display very well and can be hard to read. If your document is to be printed out, then a serif font is the best, because in print, they are easier to read.

Colours

When it comes to choosing colours in the use of any document, the first thing you must make sure is that the text is still easy to read. The contrast of the colour of text to the colour of its background has a considerable influence on legibility, as can be seen from the example to the right.



Serif Fonts = Text for Print

Sans Serif Fonts = Text for the Web



Green on Red
is hard to read,
because the
wavelengths are
different.

Colour Blind
people would
have great
difficulty
reading these.

With regard to colour schemes, and what colours go with what, the best way to ensure harmony is to take a photo from nature and pick colours from that.

Basic Design continued...

Images

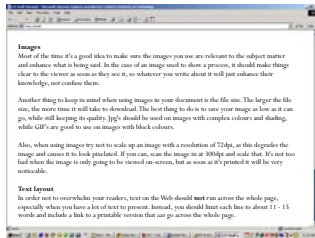
Most of the time it's a good idea to make sure the images you use are relevant to the subject matter and enhance what is being said. In the case of an image used to show a process, it should make things clear to the viewer as soon as they see it, so whatever you write about it will just enhance their knowledge, not confuse them.

Another thing to keep in mind when using images in your document is the file size. The larger the file size, the more time it will take to download. The best thing to do is to save your image as low as it can go, while still keeping its quality. Jpg's should be used on images with complex colours and shading, while GIF's are good to use on images with block colours with sharp edges.

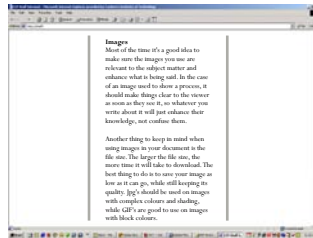
Also, when using images try not to scale up an image with a resolution of 72dpi, as this degrades the image and causes it to look pixelated. It's not too bad when the image is only going to be viewed on-screen, but as soon as it's printed it will be very noticeable. If you can, scan the image in at 300dpi and scale that.

Text layout

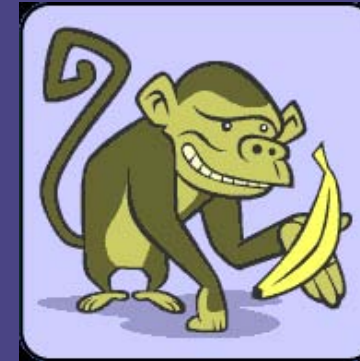
In order not to overwhelm your readers, text on the Web should **not** run across the whole page, especially when you have a lot of text to present. Instead, you should limit each line to about 11 - 15 words and include a link to a printable version that *can* go across the whole page.



Suitable for printing, not for reading on-screen



Suitable for both, but more for on-screen reading



This is the kind of image you would save as a GIF.

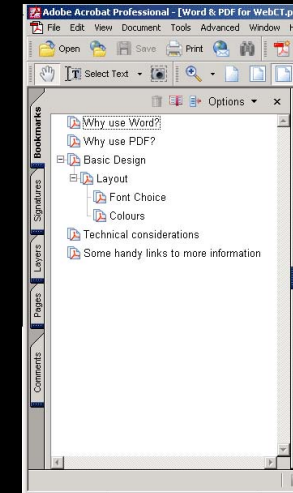


This is the kind of image you would save as a JPG.

Technical Considerations

- If the document is very long, offer "chapter" or "article" PDFs in addition to a single file for the entire document. For example, say you have a book in pdf format - you should break it up into it's chapters and provide those as seperate pdfs.
- If you add bookmarks, congratulations! You are an educated PDF publisher! Then ... make SURE you set the PDF Initial View to show "Bookmarks Panel and Page". Otherwise most users will have no idea they are there at all. (See page 11)
- Files greater than 10 pages in length should ideally include bookmarks.
- Files greater than 20 pages in length MUST include bookmarks, or your readers will be unappreciatively stuck flipping pages.
- Avoid 2 (or more) column text on your documents unless absolutely necessary.
- Always indicate the size of the file so users can make an informed decision about downloading it. e.g. Word and PDF for WebCT (pdf, 80kb)
- Always ensure that files are "Optimised for Fast Web View" (exception: files containing form-fields should NOT be optimised for Fast Web View). (See page 6)
- Ensure that the server hosting the files supports Fast Web View. Most do automatically.
- Ensure the file is as small as possible. PDF files are frequently WAY overweight. (See pages 6)

Bookmarks are links that take you to certain areas of a document. To create them, all you have to do is apply Heading Styles to your Word document - assuming you have Acrobat Writer - and when you click the button to convert to PDF, the headings will automatically be made into bookmarks. You can also add them later, when your PDF is already created using Acrobat Writer, or the editor from the freeware version pdf995.



Creating PDF Documents

Conversion Settings in Word, Excel, etc.

Before creating a PDF in any program, be it Word or Acrobat, you should make sure that the conversion settings are set up how you would like them to be. To do this in Word, click the 'Adobe PDF' menu button and choose 'Change conversion settings'.

Settings Tab

- Quality

The first option is to choose from a number of pre-set conversion settings. The main ones are Standard, Smallest File Size, Press Quality, and High Quality. For most web purposes, smallest file size is probably the best option. Choose one of them and see what the Information bubble below it tells you about that setting.

- Source File

If you would like to include the source file with the PDF, there is an option that you can tick under the heading 'Application Settings' in the settings tab.

Security Tab

- Password Settings

Here you can set up a password to restrict access to your pdf, or to restrict people from copying text, images and other content, and to stop them from printing the pdf. You might do this if you have sensitive material in there, or if you're using the pdf for assessment reasons. Mostly, it probably won't matter if people are able to copy or print your pdf, but the facility is there if needed. The biggest thing to remember when you use this function is the password you use! It won't matter if you keep the original document, but to access the pdf you will need to know the password you used for it.

Advanced Settings

Under the Advanced Settings option, you can change the compatibility, resolution, whether or not to optimize for **fast web view** (recommended, as this means the file takes less time to download).

- Image Resolution

Under the 'images' tab in Advanced Settings you can change the resolution of your images, making the file even smaller and faster to download - if your document needs to be printed, it might be best not to touch this.

- Fonts

Under the 'Fonts' tab in Advanced Settings you can choose whether to embed all of your fonts and you can also select an option that will warn you whether your fonts haven't embedded. This is good to use if you have some unusual fonts that you would like your viewers to be able to see.

Creating PDF Documents...

Bookmarks Tab

Bookmarks appear in Acrobat to the left of the screen and are there as any easy to access table of contents, with every heading linking to a certain page in the pdf document.

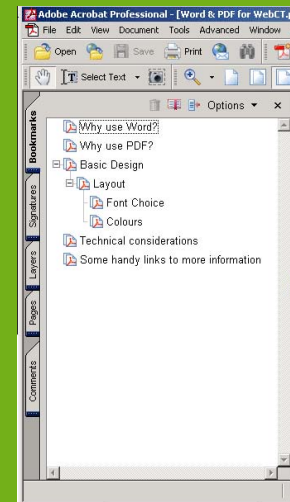
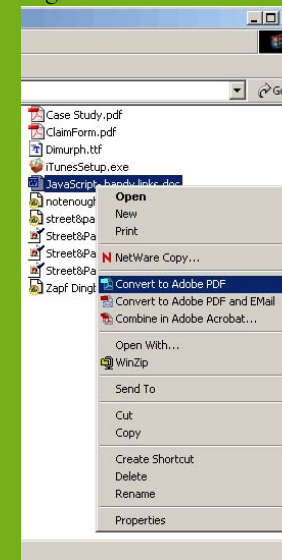
In order to use bookmarks, you can either let Word create them from your Headings or Styles or you can add them yourself later (see page 14). The default setting for pdf creation in Word is to create Bookmarks from Word Headings, so you shouldn't need to touch this, but if for some reason they aren't there you can check the box under the Bookmarks tab so that it will happen.

Creating the PDF

Right Click Creation

You can easily create a PDF document from almost any file, right from the desktop. Right-click on a file or selected files in Windows Explorer (the File Browser - My Computer) and choose Convert to Adobe PDF, Combine in Adobe Acrobat, or Convert to Adobe PDF and EMail (not available for all file types), Depending upon the type of file you are converting, either Acrobat or the source application opens and the file is converted to Adobe PDF.

Right Click Creation



Bookmarks

Creating PDF Documents...

Using Microsoft Word

To convert a Word Document into a PDF you will need to have Acrobat Writer/Professional, or a freeware pdf converter (see page 2). If you have Acrobat, a button will be present in Word that allows you to convert your word document into a PDF.

To convert the document, simply click the button*. A window will open asking you to name the document and where you would like to save it. Once you click ok, the process will start. If it is a large document it may take some time, so be patient.

Using Microsoft Excel

Converting an Excel document is the same as converting a Word document. The same buttons appear and achieve the same results.

Using Acrobat Professional 6.0 (Writer)

By using Acrobat Professional to create a PDF, you can easily create it from one file, many files, directly from a scanned image, or from the Web.

Create From File

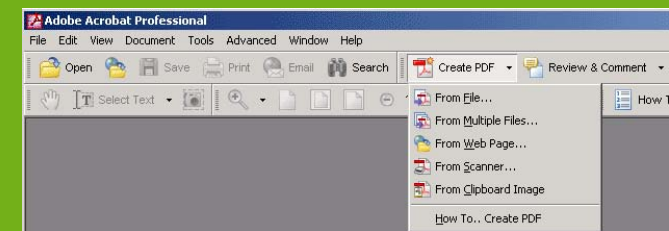
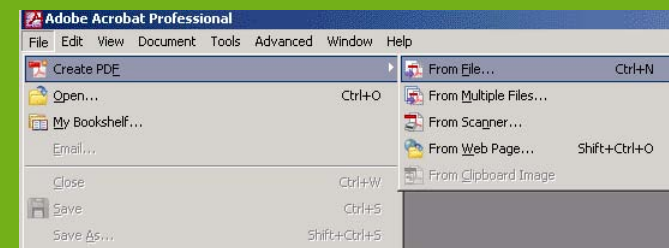
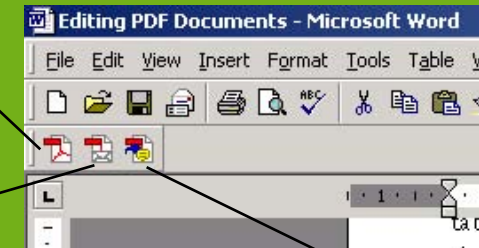
To create a PDF from a file, select File > Create PDF > From File... (As seen in the image to the right). Next, browse for your file and press Open. The application you created the file in will open and it will be processed into a PDF file and opened in Acrobat Professional

**Note: you can also create PDF's by choosing print in the program (Word, Excel, Powerpoint, etc), and choosing Adobe PDF as the printer.*

The first button allows you to convert the Word Document to Adobe PDF.

The second allows you to convert the document to PDF and email it to someone.

The third button allows you to convert it to a PDF and send it for review. (An email-based review is where you email it to a group of recipients who add comments to the document and then send it back to you. They need to have Acrobat Standard at the very least to be able to do this.)



Creating PDF Documents...

Create From Multiple Files

Choosing the create from Multiple Files option will bring up a window that allows you to browse for all the files you would like to include in the PDF document (don't worry if you leave something out, as you can always add it later). Before you press ok to make the document, make sure that you have the files arranged in the order you would like them to appear in your PDF document. (If you make a mistake you will be able to change it later, it's just more convenient if you get it right the first time).

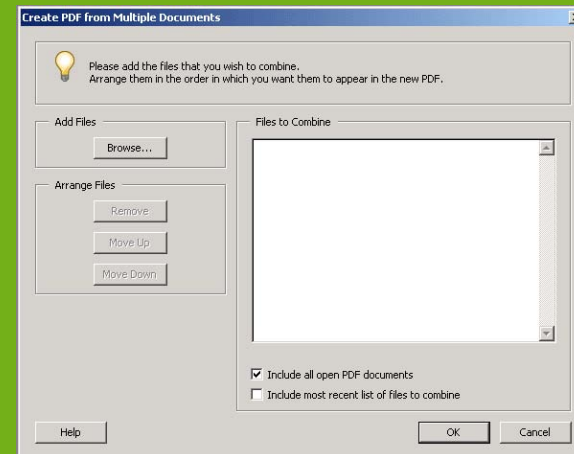
Create From Web Pages

To create a PDF document from Web Pages, choose the Create PDF > From Web Page option and type in the URL for the Website. Then specify the following options: '**Stay on Same Path**' downloads only Web pages subordinate to the URL you provide. '**Stay on Same Server**' downloads only Web pages stored on the same server as the pages for the URL you provide.

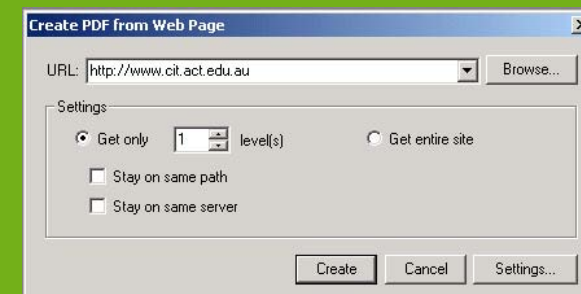
Note the following when converting Web pages:

- . You can download HTML pages, JPEG and GIF graphics (including the last frame of animated GIFs), text files, and image maps.
- . HTML pages can include tables, links, frames, background colors, text colors, and forms. Cascading stylesheets and Flash are supported. HTML links are turned into links, and HTML forms are turned into PDF forms.
- . The default/index.html frame is downloaded only once. Other pages may not open in a frame
- . You can determine whether to reference multimedia components by URL, not include them, or embed the files where possible.
- . JavaScript is partially supported.

This is the window that will appear when you create a pdf from multiple files. Click browse to locate the files and then click on the files in order to add them to your new document.



If you already have a document open and would like to add files to it, then check the box that says 'Include all open PDF documents'.



Creating PDF Doc's Cont'd...

Create From Scanner

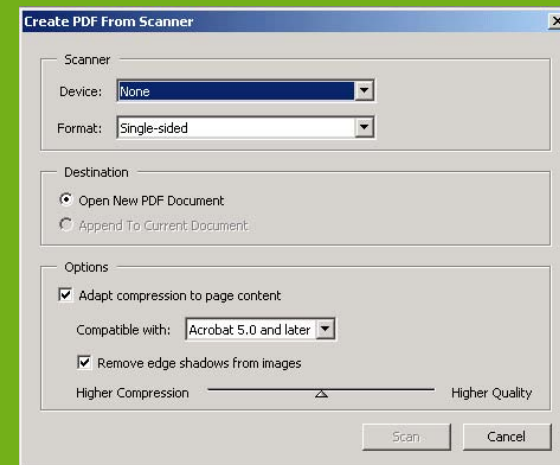
To create a PDF document or page from a scanned image, choose Create PDF > From Scanner...

A window will appear, like the one to the right, asking for the device, format and Destination. If you'd like to make the image a new document, choose Open New PDF Document. If you'd like to create the scanned image in a document that you already have open, choose Append To Current Document. (If you create it as a new document, you can always add it to another document later.)

For good compatibility always make sure you save the document as being compatible with Acrobat 5.0 and later. (If you really want to up the compatibility choose Acrobat 4.0 and later - although this will increase the file size of the PDF document). Alternatively, you can provide a link to the adobe website so that your viewers can update their Acrobat Reader to the latest version.

Troubleshooting

If you try and create a pdf from multiple documents and it seems to freeze on a certain document for a long time then you may need to convert that particular document into a pdf before you add it to the others.



Acrobat Help

More help and instructions can be found in the help menu of Acrobat Professional. To access the help menu go to Help > How to...

There are many helpful topics like how to Create PDFs, how to Review & Comment on a PDF, how to set Security options on a PDF (this is good for making sure other people can't edit your document), plus many other helpful topics.

Document Properties

Change your Document Properties in Acrobat

Click on the File Menu > Document Properties

Here you can add a Description for the document, such as the Title, Author, Subject and Keywords (this is helpful if you want to put it on the web and would like people to be able to find it if they search for a similar topic to what you have in your document - keywords will bring it up if they search for it with a search engine).

You can also find out what fonts have been used in the pdf with Document Properties. You probably won't need this, but if you'd like that font, at least you will now know what it's called so you can go buy it, or download it off the internet!

Document Properties is also where you set the Initial View - what people see on their screen when they open your document. You might decide that you would like them to immediately see the Bookmarks Panel so they are aware that they can use this to navigate the document. You can also set how the pages are viewed here, whether they are single pages that fill the screen, or a continuous run or similar. Have a go at selecting different ones before deciding on your page layout. Here you can also determine whether or not you want the page to fill their screen, be at 100%, or a range of other options. You can also choose what page it opens to on startup.

You can also set the Security Options here, if you didn't do it in Word. Just remember about keeping a record of the password, or making sure you still have the original file (which is recommended whatever you do).



Editing PDF Documents

Editing text and layout in your PDF document is possible, but not advisable. If your document has tables in it, this is especially not advisable, as the layout of the page will change. It is recommended that you keep the original documents and edit those instead.

The following methods can be applied to update the PDF document once editing has taken place.

Inserting Pages into an Existing Document

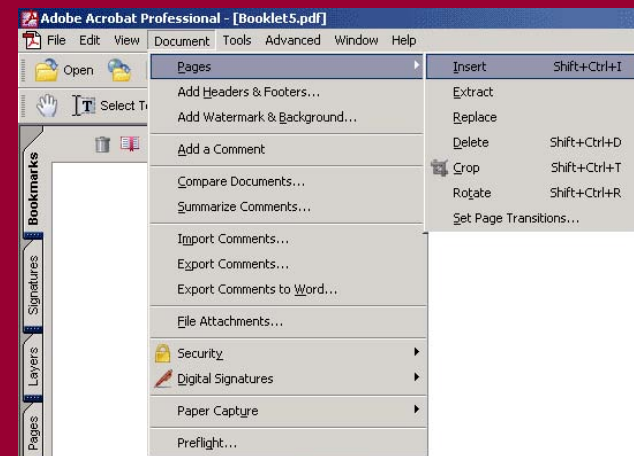
If you have a pdf document that you would like to add pages to, all you need to do is open that document, and then go to Document > Pages > Insert Pages.

A window will appear asking you if you would like to insert the document before or after the page of your choice. Choose an option and a page, depending on where you want the new document to be inserted.

Extracting Pages from a Document

In a similar way you can extract pages from your PDF document to create a new document with those pages. All you need to do is select the option Extract and then choose the pages that you would like to extract. If you would like to delete those pages after they are extracted, just click the check box that asks for this. Once you are ready, press the ok button and your pages should appear in a new document.

For help with editing pdf documents that you create using pdf995, refer to the help file that comes with the document.



Editing PDF Doc's Cont'd...

Replacing Pages from a Document

If you would like to replace some pages of your document with an edited version, all you have to do is go to Document > Pages > Replace.

Once you have selected the new PDF file that will replace the selected pages, you must specify which pages in the original will be replaced. Then you must specify



Deleting Pages from a Document

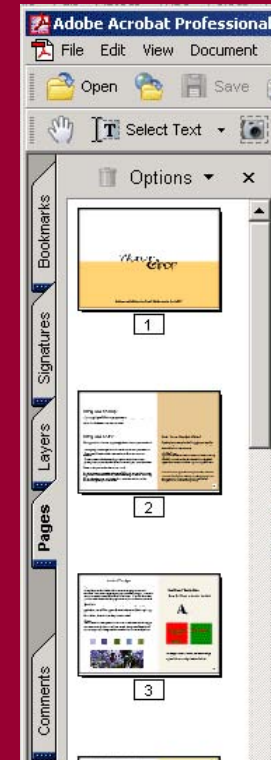
If you would like to delete a page (or many) go to Document > Pages > Delete. Specify the number of pages you would like to delete and they will be deleted.

Cropping and Rotating Pages

You can also crop and rotate your pages in Acrobat Professional. Simply follow the prompts when you select the required option.

You can also **change the order** in which your pages appear by clicking on the Pages tab on the left side of your screen. Once the side window expands, simply click and hold the left mouse button over the page you want to move and drag it to its new position.

You will know it can be moved there because a black line will appear above or below the page where you want to move it. When you release the mouse button, your page should appear in its new location.



Bookmarks

Creating Bookmarks in Acrobat


To add a bookmark yourself using Acrobat Professional, what you need to do is first open your document, then open the Bookmarks tab on the left side of the screen. Once this is open, you must choose the page you want to bookmark, and then click the icon 'create new bookmark', which is the second icon from the left.

Once you have clicked this, a bookmark will appear and then you can name it appropriately.

Delete a Bookmark

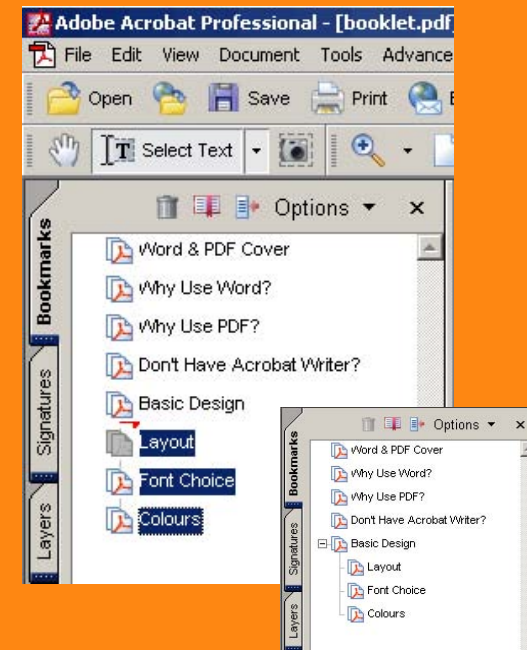
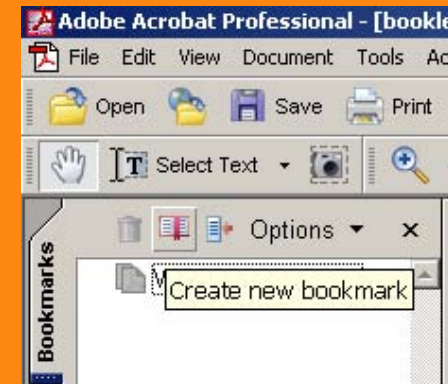
To delete a bookmark, all you have to do is click on the bookmark, and then click on the trash icon (next to the create new bookmark icon). Simple as that.

To Change the Hierachy

In order to have bookmarks within bookmarks - in case you want to show that they are all on the one page, or all to do with the one topic - you have to select all the bookmarks that you want to put under the main bookmark, and drag them underneath it until you see this  (see the image to the right >).

Zoom in on a particular area

When someone clicks a bookmark, they can either see the whole page, or they can see a zoomed in section of it, if that's the part you would like them to see.



Bookmarks...

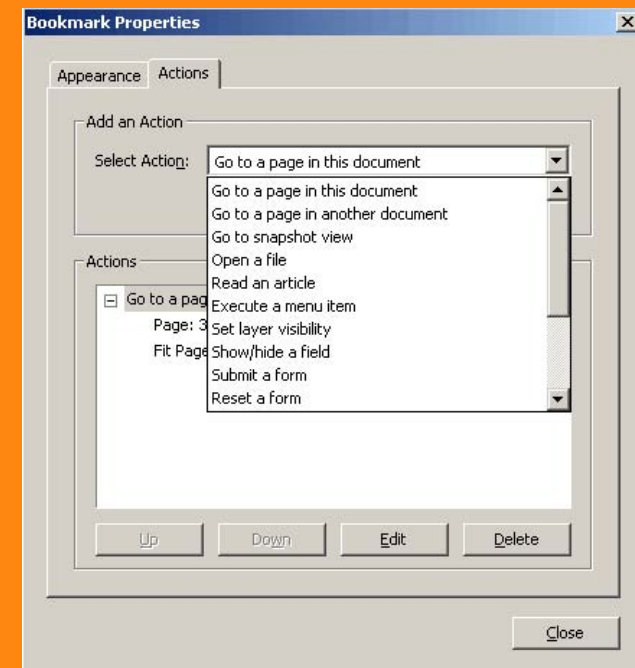
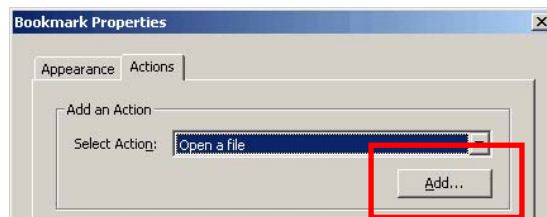
In order to have a bookmark zoom in on an area, all you have to do is:

- use the zoom tool to zoom in to the area and then create the bookmark
- or if the bookmark has already been created, all you have to do is zoom in to the area and right-click on the bookmark then choose Set Destination. It will ask you if you're sure - just say yes :o)

Set Bookmark Properties

In order to set the bookmark properties, you have to right-click on a bookmark and select Properties. In the properties dialogue box, you can set the actions that a bookmark does. There are a number to choose from, depending on what you'd like it to do. The image to the right > lists a few options that you might like to play with.

Once you have chosen an action, you must click the add button before it will take effect. Once you see that it has been added, close the dialogue box.



Digital Signatures

What are they?

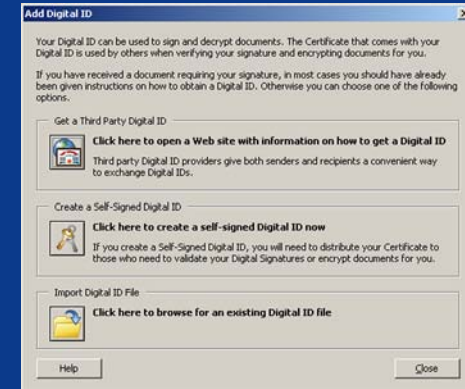
A digital ID contains your signature information. Digital IDs are also referred to as credentials or profiles. You can get a digital ID from a third-party provider, or you can create a self-signed digital ID and share your signature information with others. A certificate is a confirmation of your digital ID and contains information used to protect data.

In general, digital IDs are issued by a third party for use in any official capacity. The provider of digital ID certificates is sometimes called a certificate authority or a signature handler. You may want to create more than one digital ID if you sign documents in different roles or with different certification methods.

When a digital signature is applied, a unique fingerprint with encrypted numbers is embedded in the document. The recipient needs the signer's certificate to validate that the digital signature and certificate match the signer's digital ID.

To Specify A Default Signing Method:

1. Choose Edit > Preferences and then choose Digital Signatures.
2. From the Default Method to Use When Signing menu, choose a signing method. If you want to be prompted to select the signing method each time you sign, select Ask When I Sign.



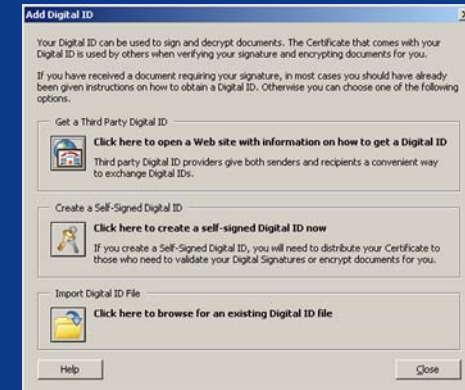
Digital Signatures...

Creating a digital ID (Default Certificate Security)

When you create a self-signed digital ID using Default Certificate Security, the resulting file stores the following items: an encrypted private key used for signing or encrypting documents, a public key contained in a certificate used for validating signatures, and a time-out value if a password is required for signing. The digital ID file you create includes a .pfx extension.

To create a self-signed digital ID (Default Certificate Security):

1. Choose Advanced > Manage Digital IDs > My Digital ID Files > Select My Digital ID File. (If another digital ID is open, this command changes to Open Another Digital ID File.)
2. Click New Digital ID File, and then click Continue.
3. In the Create Self-Signed Digital ID dialog box, do the following:
 - Type a name for your digital ID. When you certify or sign a document, this name appears in the Signatures panel and in the signature field.
 - To use Unicode values for extended characters, select Enable Unicode Support, and then specify Unicode values for the appropriate fields.
 - Choose a key algorithm from the menu. 2048-bit RSA offers more security than 1024-bit RSA, but 1024-bit RSA is more universally compatible.
 - Specify whether you want to use the digital ID for digital signature, data encryption, or both.
 - Type a password containing at least six characters. Do not use double quotation marks or the following characters: ! @ # \$ % ^ & * , | \ ; < > _ . Type the same password in both the Choose a Password and Confirm Password text boxes. Passwords are case-sensitive.



Digital Signatures...

4. Click Create, specify a filename and location, and then click Save.
5. Export and send your digital ID certificate file to those who need to validate your signature.

Important: Make a backup copy of your digital ID file. If your digital ID file is lost or corrupted, or if you forget your password, you cannot use that profile to add or validate signatures.

Reviewing & Commenting

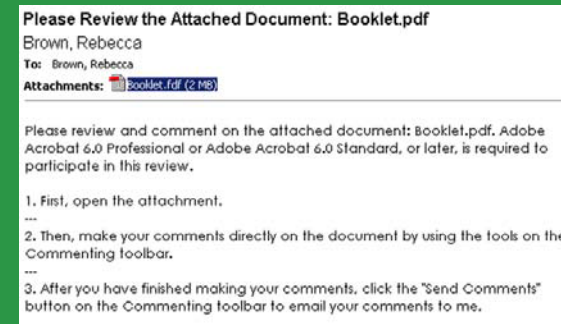
Email-based review

Rather than just sending a document as an email attachment, you can start an automated email-based review. Reviewers can add comments, then click the Send Comments button to send the comments back to you as an email attachment. You can then automatically import their comments into the original PDF documents simply by opening the attachment.

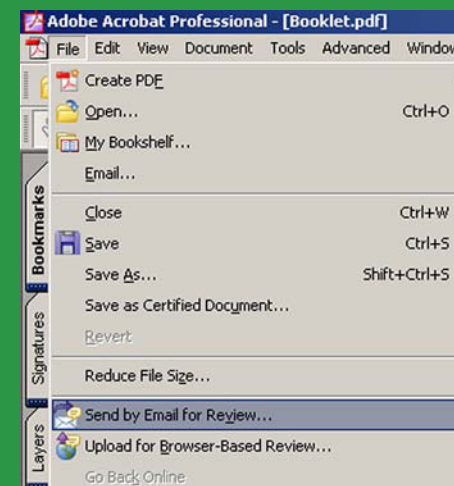
Note: When you send comments to the initiator of an email-based review, only the comments are included, not the full PDF document. If you want to share your comments with other people besides the initiator, save a copy of the PDF document that includes your comments, and then email it to those people.

To participate in an email-based review:

1. In your email application, open the attached PDF file to open a copy of the PDF document.
2. Save the document to a reliable location so that you have the option of reviewing the document later.
3. Use the tools on the Commenting toolbar to add notes (see page 21).
4. When you're finished adding comments, save the document, and then click 'Send Comments' on the Commenting toolbar (or choose File > Send Comments to Review Initiator). An FDF (Form Data Format) document containing your comments is attached to an email message that you can send back to the initiator.
5. If you want to send additional comments, open the version you saved, add or edit your comments, and click the Send Comments button again. The initiator will receive the new and edited comments. Unedited comments are not duplicated, and deleted comments are not deleted in the initiator's document. If you did not save the document during the first review, reopen the email attachment that the initiator sent to add new comments.



The email you will receive for an email-based review



Send for email-based review

Reviewing & Commenting...

The Review Tracker

The Review Tracker includes the Adobe PDF documents that you have either sent or received for email-based reviews. If you started a review, use the Review Tracker to send reminder messages, remove review documents, and invite more reviewers.

To use the Review Tracker:

1. On the toolbar, choose Review & Comment > Track Reviews.
2. To specify which review documents appear, select the necessary options from the Show menu. Items with checkmarks appear in the Review Tracker list box.
3. Select an option: Open, Remove, Manage > Email all Reviewers, Manage > Send Review Reminder, Manage > Invite more Reviewers.

What is commenting?

A comment refers to a note, highlighting, and any other markup that you've added to an Adobe PDF document using the commenting tools. A note is the most commonly used comment. You can place comments anywhere in the document, and you can determine the style and format of the comment.

Open the commenting toolbars

To open the commenting and advanced commenting toolbars:

- Choose View > Toolbars > Commenting or Advanced Commenting.

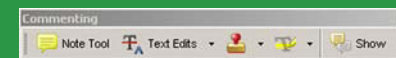
Note: People with the free downloadable Adobe Reader can add comments to a PDF only if the creator of the original PDF has enabled commenting. To access their commenting toolbar they should: choose View > Toolbars > Commenting.

Review Tracker

A. Review Options

B. Sent and received reviews

C. Information on selected reviews



The Commenting and Advanced Commenting Toolbars.

Reviewing & Commenting...

Adding note comments

When you add a note comment, a note icon and a pop-up window appear. You can add bold, italics, and other attributes to text in a pop-up window, similar to formatting text in a word-processing application. If you enter more text than fits in the pop-up window, the text scrolls. You can also resize the window, if desired.

To add a note comment:

1. Click the 'Note Tool' icon on the Commenting toolbar.
2. Click once on the page where you want to add the comment.
3. Do any of the following:
 - Write/Edit the text as needed. When you are finished, click the close box in the upper right corner of the pop-up window, or click anywhere outside the pop-up window.
 - Use the properties toolbar to change the text formatting, note color, and other note properties.
 - Use the commenting panel in the Preferences dialog box to change the font size, default pop-up behavior, and other settings for creating and viewing comments.

To delete a note comment:

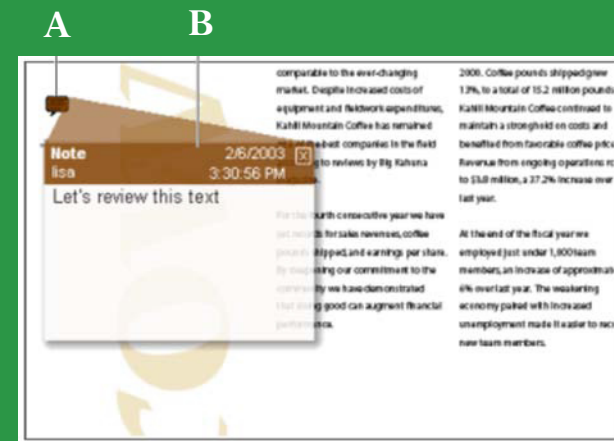
1. Select the Note tool, or the Hand tool.
2. Select the note icon, and then press Delete. Or Right-Click the note icon or the title bar of the pop-up window, and then choose Delete.

Setting commenting preferences

To make changes that affect all comments, set Commenting preferences. For example, you can make comments easier to read by selecting a larger font size, turn off connector lines or side-alignment, and make sure that the Note tool remains selected after you click to add a note comment.

To set preferences for comments:

Choose Edit > Preferences, and then select Commenting on the left side of the Preferences dialog box. There are a number of options that you can change here. If you would like to know what something is, search Acrobat's help function by choosing Help from the menu bar > complete Acrobat Help.



Creating a note comment A. Note Icon B. Pop-up window

Reviewing & Commenting...

Adding comments in a text box

You can create a text box comment on any page in an Adobe PDF document and position it anywhere on the page. A text box comment remains visible on the document page; it does not close like a note comment.

To add a text box comment:

1. Make sure that the Advanced Commenting toolbar is open.
2. From the Advanced Commenting Toolbar, select the Text Box tool.
3. Click the location where you want to place the text box, or drag a rectangle to define the boundaries of the text box.
4. Use the properties toolbar to change the color, alignment, and font attributes of the text you type, and then type the text.
5. Do any of the following:
 - Click the text box to select it. use the properties toolbar to change the border and fill options.
 - Double-click the text box to edit the text or to change the text attributes. Drag across text to select it, and then select options from the Properties Toolbar.