

Shared Review and Email Review

Foxit PDF Editor enables users to initiate a review by two methods: **Shared Review** and **Email Review**. You can set up your review, specify reviewers and review deadlines. You do not need to import and export comment data or manually track reviewer responses. The review **Tracker** can help review initiators track all reviews and manage the whole review in real time.

See also the tutorial on [Shared Review](#).

Shared Review

Collect Comments on an Internal Server

Shared Review allows document authors to share a document on an internal server with others to gather feedback/comments from the reviewers. The review initiator can specify the document location, invite participants and set the review deadline.

After receiving the invitation from the review initiator, reviewers can mark-up PDFs using a full set of commenting tools. Comments from reviewers will be stored in the internal server and synchronized by Foxit PDF Editor to download them at a regular interval. Reviewers will be notified if new comments are added by others and they can also reply to these comments.

1. (For review initiators) To send a PDF out for shared review (Available in *Pro Only*), please do the following:
 - Choose a document for shared review and open with Foxit PDF Editor.

Note: *To guard against non-reviewers from accessing the document while it is on a shared repository, before sending out for review you can add some security policies to the document such as password/certificate encryption and AIP protection.*

- Choose **Share > Send for Shared Review > Collect comments on an internal server**.
- In the pop-up **Send for Shared Review** dialog box:
 - 1) Select the location of the document. The location can be a network folder or an on-premise SharePoint workspace.

Tip: *If using a network folder, it must be a Windows machine running Windows 7, windows Server 2008, or a later version of either. All reviewers must have read and write access to the shared folder and then can make comments with Foxit PDF Editor or Reader. You can track each reviewer's comments and reply to them accordingly. Reviewers can also see and reply to each other's comments.*
 - 2) Select a distribution and display method:

Send it automatically as a link within the message – The path to the shared document will be automatically included in the email message to be sent to reviewers using your installed email client (i.e. Outlook). The shared document will be named “[original document name]_review.pdf” by default.

Send it automatically as an attachment to the message – The shared document will be automatically sent as an email attachment to reviewers with the name “[original document name]_review.pdf”.

Save a local copy and manually send it later – Click **Browse** button to rename the shared document and choose a location to save it and send it to reviewers later manually.

3) Name this server profile, e.g. “**S1 (send as attachment)**”, for further use in the future. The profile is saved with the options you specified above. In the future, you can select the profile directly from the Ribbon and skip this step.

- Click **Next**. If you haven’t set your identity information for your PDF viewers yet, enter your identity information.
- Click **Next** to go on. Enter the email addresses of the desired reviewers. A semicolon or a return can be inserted between each address if there is more than one address. Or click **To...** button to access your contact list in your email system.
- Choose the review deadline and then type in an email message.
- After you send the email or save the shared document to a local copy, the shared document is automatically opened, with a message box in the application window. With the options in the message box, you can publish comments, check for new comments made by reviewers and track the whole review. See also [Review a shared review document](#) and [Review Tracker](#).

2. (For reviewers) To review a shared review document:

Upon the review initiator sending out the document, the specified reviewers will receive an email invitation to a PDF review. The email includes an attached document named “[original document name]_review.pdf” or provides a URL to the PDF. To review the document:

- 1) Download the document and open it with Foxit PDF Editor.
- 2) If it is your first time opening a shared review document, you will be prompted for your identity information. Please enter at least your name and email address.
- 3) Enter an account name and password for the shared folder where the shared review document is located.
- 4) If the notification message setting is enabled in **File > Preferences > General**, a message box appears in the application window with three options: **Check for New Comments**, **Publish Comments** and a menu with three commands (**Track Reviews**, **Save As Archive Copy**, and **Work Offline**). And the **Manage Shared Review** button in the **Share** tab is available. Clicking on **Manage Shared Review** drops down a menu with the commands: **Publish Comments**, **Check for New Comments**, **Save As Archive Copy**, and **Work Offline**.
- 5) You can add your comments using annotation tools and then click **Publish Comments** in the message box or click **Share > Manage Shared Review > Publish Comments** to publish your comments which will be saved to the shared server.
- 6) Click on **Check for New Comments** in the message box or click **Share > Manage Shared**

Review > Check for New Comments to check for new comments made by the initiator or other reviewers. You can also reply to the comments. In normal situations, comment publishing and checking will happen automatically. Foxit PDF Editor supports to configure the interval to check for new comments by selecting a length of time in **File > Preferences > Reviewing > Automatically Check for New Comments**. The Foxit PDF Editor icon in the taskbar will flash to prompt you that new comments are checked.

7) Do more actions with the following options:

Track Reviews – To track all reviews you initiated or participated in, which is very useful when you are involved in multiple reviews. See also [Review Tracker](#).

Save As Archive Copy – Saves a copy of the document with review comments to your hard drive when the review has ended.

Work Offline – If you don't want to publish comments right after you make the comments, this option can keep your work offline, until you click **Work Online** to be able to publish comments.

Note:

1. Reviewers will not be able to make comments or do other modifications to the shared documents in non-Foxit PDF viewers.

2. Reviewers should save the document as an archive copy to the hard drive using Foxit PDF viewers so as to modify the content.

Email Review

Email Review is useful when reviewers don't have access to a common server or initiators don't need collaborative reviews. In an Email Review, the initiator sends PDFs to reviewers as attachments and can view comments only after receiving the commented PDFs from reviewers. Also, the reviewers can only send back the PDFs after adding comments, and they cannot view comments made by others.

1) To send a PDF out for email review (Available in *Pro Only*), please do the following:

- Choose a document for email review and open with Foxit PDF Editor. This document becomes the master file into which you can merge comments you receive from reviewers.
- Choose **Share > Send for Email Review**, or click **File > Share > Send for Email Review**.
- In the pop-up **Send for Email Review** dialog box, specify the recipients that you want to send the document to for review, type in the message in the text box and click **Send Invitation** button.
- A new email with the document attached will appear for you to send. Click **Send** to send out the email.
- You can track the review status with the review tracker. Please refer to [Review Tracker](#).

Note: Recipients of the shared document can review it and send it back with Foxit PDF Editor or Reader, as well as Foxit PDF Reader Mobile (for Android).

2) To participate in an email review:

The recipients can download the document sent from the initiator and open it with Foxit PDF Editor, add their comments and click the **Send Comments** button in the message box (if the notification message setting is enabled in **File > Preferences > General**) or choose **Share > Manage Email Review > Send Comments** to send their comments back to the initiator.

Likewise, you can manage your reviews by using the Tracker. See also [Review Tracker](#).

3) To merge comments:

After receiving the document with comments from reviewers, the initiator opens it and will be prompted with a message box about whether to merge comments from this document into the master file or not. Sometimes the initiator sends the same document with additional comments to reviewers again. In this case, reviewers will also be prompted whether to merge comments when they open the document they receive.

If you choose **No, open this copy only** button, you can still merge comments after you open it by clicking **Merge Comments** button in the message box (if notification message is enabled) or choose **Share > Manage Email Review > Merge Comments**.

Review Tracker

The review Tracker helps you easily manage document reviews in real time. The tracker shows all the reviews you sent and joined and the detailed review status including review deadlines, reviewers, comments, etc. You can also email reviewers/initiators and add reviewers with the tracker. If you are the review initiator in a Shared Review, you can also change the deadline, end the review and start a new review with the same reviewers.

To track all of your reviews, please click **Share > Tracker** or click **File > Share > Tracker**. In the **Tracker** window, you are enabled to save the review details in the Tracker as a PDF file by right-clicking the document name in the Tracker and choosing **Create PDF From Tracker Details** from the context menu. You can also categorize your reviews by folders in order to find reviews easily. Steps are as follows:

- To create a new folder in the tracker, right-click the **Sent/Joined** group or any review listed under the **Sent/Joined** group > choose **Create New Folder** > enter the name for the new folder > click **OK**.
- To list a review in your created folder, right-click the review, select **Send to Folder**, and choose the folder to which you want to move the review. To change the folder for a review, redo the operation, and choose the desired folder from the **Send to Folder** context menu. The **Top Level** option in **Send to Folder** context menu allows you to move the selected review out of its current folder, and list it in the **Sent/Joined** group.

- To remove a created folder from the tracker, right-click the folder, and choose **Remove Folder from Tracker**. Please note that removing a folder from the tracker will remove all the reviews listed under it.