GH Editorial Guide #3
Working with Adobe PDF mark-ups

If you ask a professional proofreader to check a PDF document, there are various ways in which they could indicate their suggested changes and raise notes or queries.

We proofreaders don't normally edit the actual content directly – that would need specialist software, and in any case it could disrupt the way the text is set out on the pages. Instead, the best solution is usually for the proofreader to *tell you* what should be changed – using 'mark-ups' – and for you to go back and amend the *source document* and then recreate the PDF version.

When we proofread for publishers, we often use a set of proofreading marks defined by the British Standards Institute, which were originally designed to be written on paper but can also be applied to a PDF file. But we normally don't expect other types of customers to be familiar with this system. Instead, we often use the functions provided by the *Comment* feature in Adobe products such as Acrobat Reader DC, which this guide is based on.

If you have any specific preferences about how the document should be marked up, make sure you agree on these with the proofreader at an early stage. The outcome might affect the amount of time needed and the fee to be paid.

I hope this guide will to help you to interpret the mark-ups that you'll get from your proofreader, and to work out how to act on them as you work towards the finished product.

Graham Hughes

GH Editorial

www.gh-ed.com

Please note: *The detailed advice and screenshots in this guide are based on using Adobe Acrobat Reader DC, running on Windows 10. Some details might be different with the software and operating system that you're using, but hopefully not enough to make my suggestions difficult to follow.*

The *Comment* option

After opening a PDF document using Adobe Acrobat Reader DC, you should see *Comment* among the options on the right:
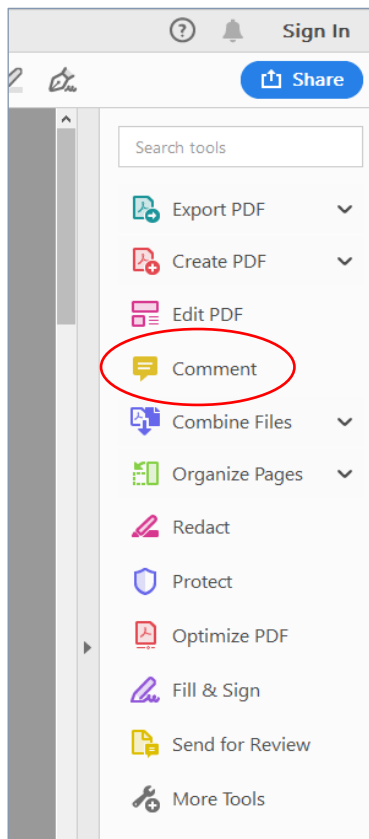
If you're using another Adobe tool, it might be called *Annotations* instead.

If you select this option, the menu will be condensed into a set of icons, and a panel (the *Comment pane*) will appear showing at least some of the mark-ups that your proofreader has added:
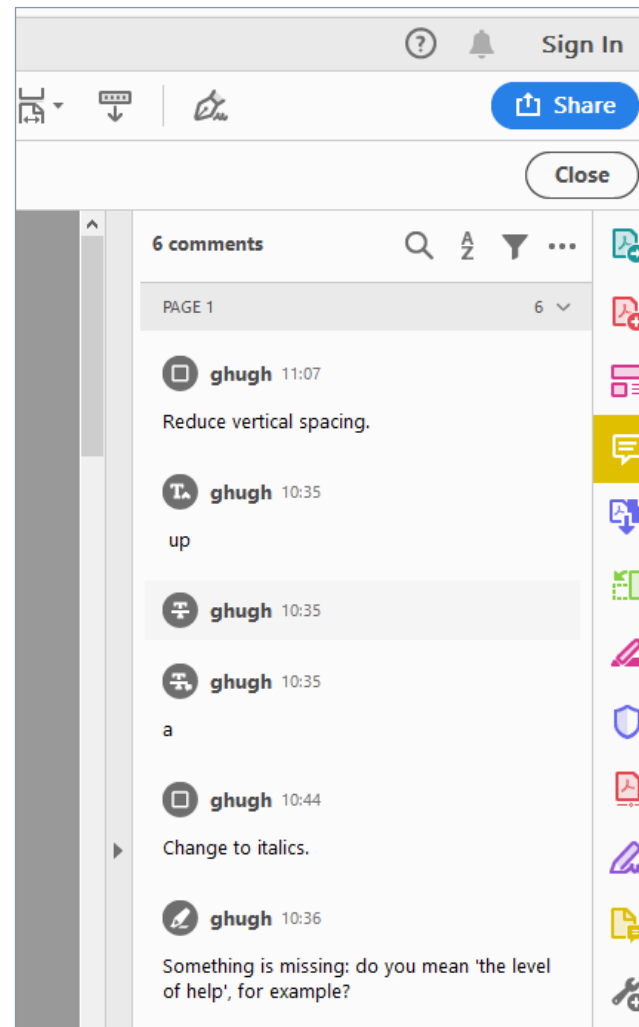
What you'll see

Matching the mark-ups with the main text

Each mark-up is represented by two things:

- an indicator in the main text
- a box in the *Comment* pane that gives the details.

If you click on either of these, a blue box will highlight the part of the text that the mark-up applies to, and the background of the associated box in the *Comment* pane will become darker, with a '…' menu icon and a white reply area appearing. This helps you to see which piece of text each box relates to.

Also, if you hover your cursor over the relevant piece of text, a pop-up appears temporarily, showing what's in the corresponding mark-up box.

Types of mark-up

There are five main kinds of mark-up to look out for (you can find examples on the next page):

- **Insertion** – A blue pointer appears in the position in the text where something should be inserted. In the *Comment* pane, you'll find a 'T' followed by a small pointer; underneath this is the text to be inserted.

- **Deletion** – The text to be deleted is crossed out with a red line (known as a *strikethrough* in Acrobat). The *Comment* pane normally just has a crossed-out 'T', although the proofreader might have added a comment underneath (see the 'Clarifications' section).

- **Substitution** – The text to be replaced is crossed out with a blue line. The *Comment* pane has a crossed-out 'T' followed by a small comment icon, indicating that the text underneath is a replacement for the old text. (Adobe's terminology is slightly confusing here: the actual name of this function is 'Add note to replace text', which doesn't quite reflect what it's normally used for.)

- **Formatting change** – This can be indicated in a number of ways, depending on the method that the proofreader has chosen or agreed with you, and sometimes on the type and shape of the content that needs to be reformatted (N.B. the colours mentioned here are the default ones, but you can change them – see the 'Properties' section):

  o Highlighting in yellow, with the instructions provided in the box in the *Comment* pane.

  o A rectangle or oval with a red outline, again with the instructions in the box in the *Comment* pane.

  o Highlighting with a red *callout* box (within the main text area, and with an arrow pointing to the text) that gives the instructions.

- **Note or query** – Any of the methods mentioned above for formatting changes might also be used for notes and queries, where the proofreader has decided to tell or ask you something about a specific piece of text. If the proofreader wanted to provide a more general note, perhaps about a whole page or the whole document, they might have used one of the following instead:

  - A sticky note – a small, movable yellow box with a white comment icon, with the note or query in the box in the *Comment* pane.

  - A text box – a red rectangle (within the main text area) containing the note or query.

Here are examples of some of these mark-ups:
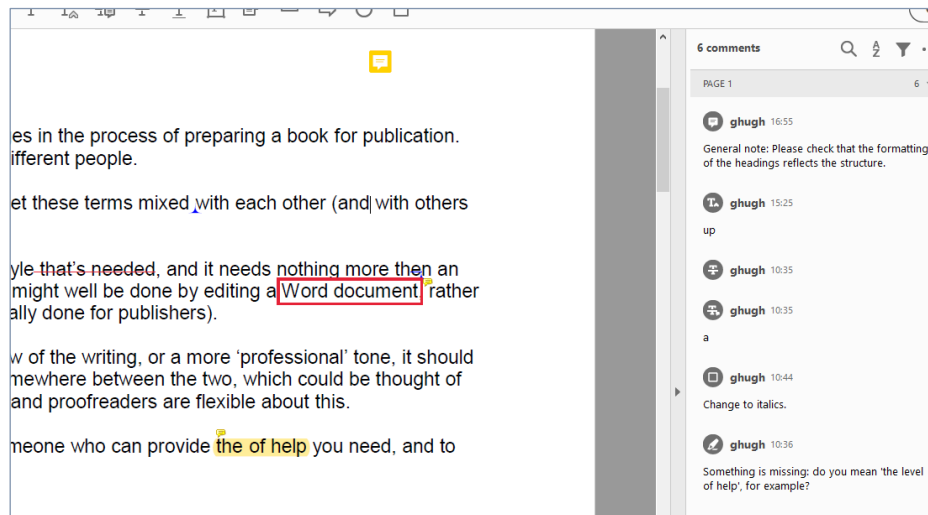
The mark-ups mean the following respectively:

1. General note about headings.

2. Insert 'up' between 'mixed' and 'with'.

3. Delete 'that's needed' (and the preceding space).

4. Substitute 'e' (in 'then') with 'a'.

5. Instruction to change 'Word document' to italics.

6. Query about the wording 'the of help'.

And here are some more examples, again followed by explanations of the mark-ups:
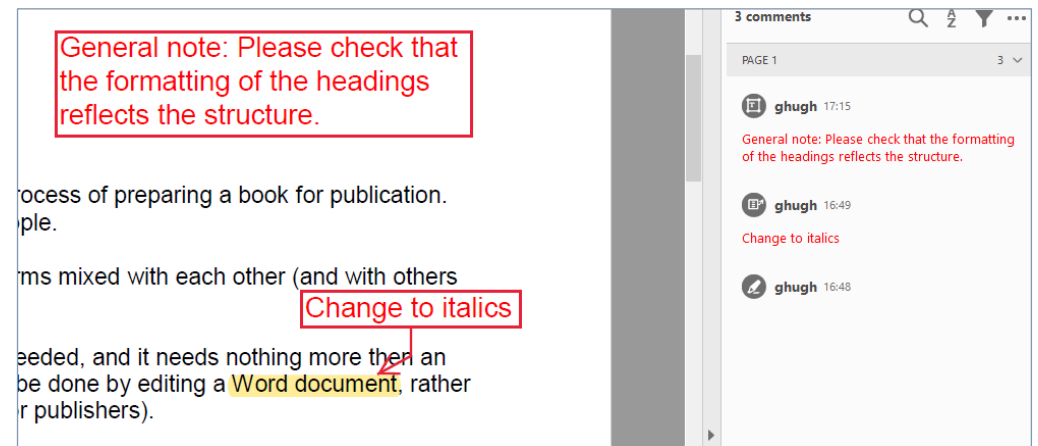
1. General note about headings, as before.

2. Callout box with instruction to change formatting of the highlighted text ('Word document').

3. Highlighting for the instruction (see no. 2).

Clarifications

Sometimes, a basic mark-up might not be clear enough. For example, if the proofreader is suggesting you replace a hyphen with a space, the box in the *Comment* pane will look as though it's empty, and it won't be obvious what it's telling you.

To help with this, the proofreader might add a note for clarification, typically in angled brackets as shown here:

Customising the Comment pane

By default, *all* comments will be listed, in the order in which the associated text appears in the document itself.

If this isn't what you want, you can temporarily tailor the panel's contents in various ways to suit what you need. You'll find these options at the top of the panel:
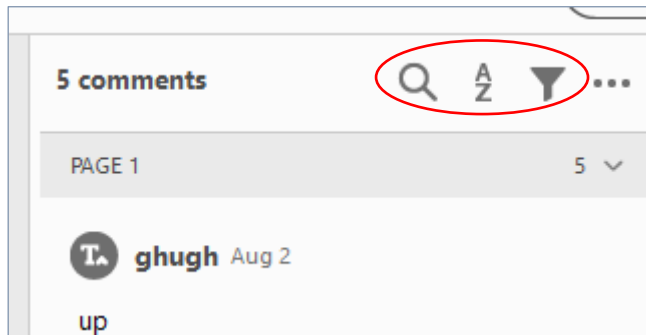
Here's what these icons mean, respectively:

- *Search comments* – to show only the comments that contain a given string of characters.

- *Sort comments* – to sort them by page (the default), author, date, type (insertion, deletion, etc.), checkmark status or colour.

- *Filter comments* – to filter them by authors, types or colours.

Managing mark-ups

Proofreading is usually a single-pass operation – in other words, it will be up to you and/or your colleagues to revise the text in response to the proofreader's mark-ups, with no further involvement from the proofreader except perhaps for a few points of clarification. In the guidance below, I've assumed that this is the case.

Replying to mark-ups

Whenever a comment box in the *Comment* panel is highlighted, you'll see a white space within it, with the words 'Add a reply…'.

Even if you're not going to send the document back to the proofreader, it's often a good idea to use this to record your response, just for your own reference, especially if a difficult or complex issue has been raised.

Replies can also be helpful if you're working with colleagues, or anyone else other than the proofreader – for example:
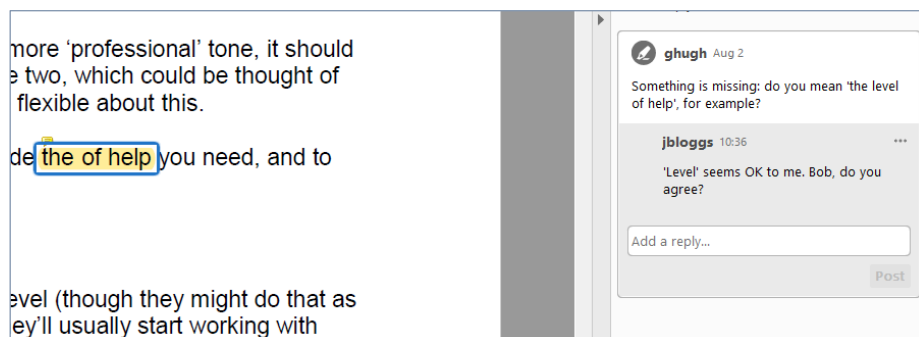
As the screenshot shows, when you've added a reply, another white space appears so that someone can add a further reply, and so on.

Checkmarks

To help you to keep track of which mark-ups you've dealt with, you can add a *checkmark* (tick) to each one. To do this, either right-click on the comment box or click on the '…' menu icon, and then select *Add Checkmark* from the menu. A tick will appear in a blue box, as shown below.
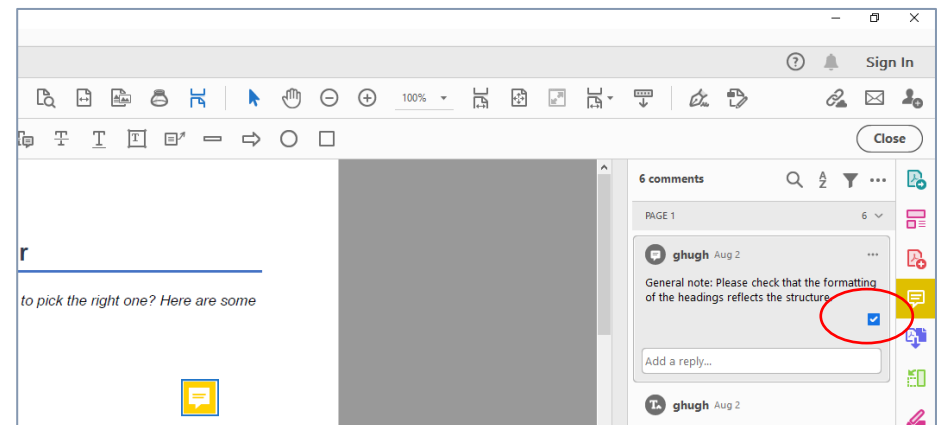
To undo this, bring up the menu as described above and choose *Remove Checkmark*.

Setting status

For a more sophisticated way of tracking your follow-up work, you can use the *Set Status* option from the comment-level menu mentioned above. This gives you a choice of five status indicators:

- None (dash in grey box)

- Accepted (thumbs-up in green box)

- Cancelled ('X' in red box)

- Completed (tick in green box)

- Rejected (thumbs-down in orange box)

Properties

You can adjust the way a mark-up appears *in the main text* by using the *Properties* option in the comment-level menu. This option is also in the menu that appears if you right-click on the mark-up itself in the main text.

For example, you could pick out the proofreader's most important queries by making their highlighting red rather than the usual yellow. The range of properties available depends on the type of mark-up.

Deleting mark-ups

If you're sure that you no longer need a mark-up, you can remove it by selecting *Delete* from the comment-level menu (or the menu that appears if you right-click on the mark-up in the main text).

Generally, though, it's advisable to keep all the mark-ups, and instead use checkmarks or status indicators to track where you're up to with each of them, as we saw earlier.

Something to bear in mind: if you delete one of the proofreader's original comments, any replies to that comment will *not* automatically disappear with it.

Wrapping up

Adobe's Comment feature provides a useful, reliable way for a proofreader to suggest changes to, and raise queries about, your PDF documents.

By learning how to browse, interpret and manage the mark-ups, you can become proficient at applying them to your documents, hopefully producing the best possible results.

Key points

- The proofreader will not have changed the actual content of your document – they will merely have *suggested* changes for you to make in the source document. After making these changes, you'll need to recreate the PDF version and check that the changes have been effective.

- Make sure you're clear about how your proofreader is going to provide the mark-ups.

- Mark-ups come in various types, the main ones being insertions, deletions, substitutions, formatting changes and notes/queries.

- The mark-ups are flagged up, in various ways, in the main text area. If the *Comment* pane is open, you can see the details of each one.

- You can customise the *Comment* pane so that it just shows you what you want to see, in your chosen order.

- As you start working through the mark-ups, you can manage them by replying to them, adding checkmarks, setting their status and adjusting their properties. You can also delete them, but this generally isn't a good idea.

Further reading

- Adobe:

    o ['Managing comments | view, reply, print'](#)

    o ['Use annotation and drawing markup tools to add comments in PDFs'](#)

    o ['Viewing PDFs and viewing preferences'](#)

GH Editorial is a service run by Graham Hughes, an editor and proofreader with a background in information technology.

Graham can work with many types of written material, but specialises in business documents and non-fiction books.

To learn more about Graham and how he can help you, please visit the GH Editorial website at www.gh-ed.com or his Chartered Institute of Editing and Proofreading directory entry at www.ciep.uk/directory/graham-hughes.

Email – graham@gh-ed.com

LinkedIn – www.linkedin.com/in/graham-hughes/

Twitter – www.twitter.com/GHughesEd