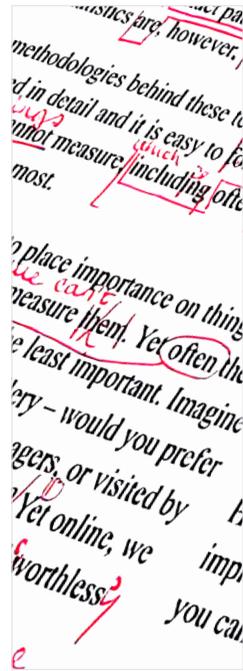


Electronic Proofreading

USING PDF MARKUP WITH INDESIGN



WELCOME

Merely mentioning the word *workflow* will make the skin crawl on many an editor. Yet, the interface from editor to designer is one that is ripe for optimization. Whether you want to bother with digital proofreading depends to a large extent on who is paying for what. And while I'm still happy to take handwritten markup in cryptic proofreader shorthand on a printed proof in my studio, I will admit that, when used properly, digital commenting tools are faster, more traceable and more accurate . . . if somewhat less flexible.

This guide is written for my editorial friends out there, for whom I've asked (or they've offered) to provide editorial markup for a project created in InDesign. I'm assuming at this point that the original manuscript was already edited for content, imported into InDesign for layout and typesetting, and now is undergoing proofreading.

Digital markup in a pdf is similar to "track changes" in word processing software like Microsoft Word. However, in a pdf you are commenting on a formatted document using these tools, you are not actually editing or changing it, at least not in the sense of modifying the typeset file. Your comments are markup, just as if you were writing on a printed page.

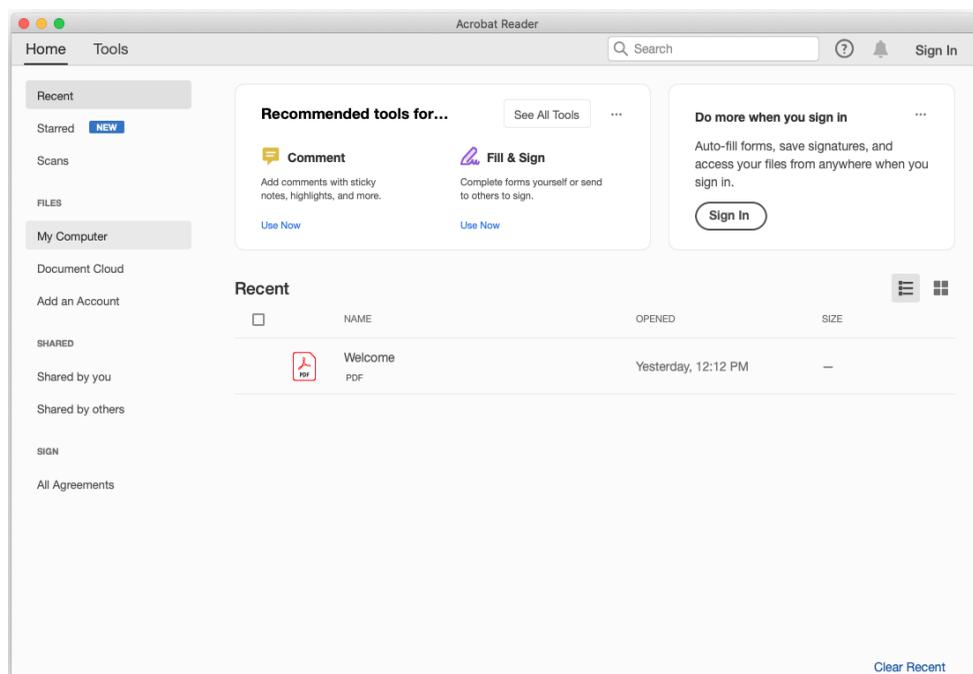
Well, almost.

FIRST STEP: TOOLS

For this to work, I'll be handing you a pdf document, and you'll be reading and editing from within Adobe's **Acrobat** software. The basic free version, Acrobat Reader is fine for this task. It is generally good practice to have the latest version (get.adobe.com/reader/). Adobe added some nice features in mid-2019, so if you're using a version older than that, I would suggest updating. But, honestly, any version from the last couple of years is fine.

If you are installing Acrobat Reader, you'll need to accept the license agreement when you first run the program. And a quick tour overviews some of the tools I'm taking about here. While you do not need an account at adobe.com, it may help with file sharing and such. It is also free (the account is; the advertised software or anything that follows a "free trial" is not).

Open the pdf file I sent you using the "Open File" button; the **File > Open...** menu item; or by navigating to it under "My Computer" on the left hand side. NB: it is most likely a low resolution pdf file I sent, to keep the file size small. This means if you zoom in (or print it out), the graphics might look jaggy. Rest assured, the text is all perfect because it is displayed using drawn vector font shapes.



The free Acrobat Reader (or its web-based equivalent) from Adobe.com is the only software tool you need to add markup comments to a formatted pdf.

ASIDE: THE WEB BASED ACROBAT READER

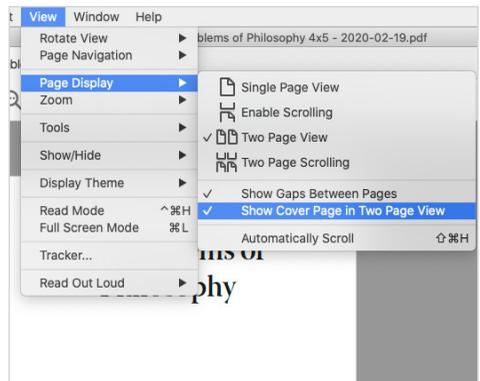
If you don't want to, can not, or are unable to install Acrobat on your computer, if you want to use your tablet, or any of a myriad of other valid concerns or reasons for not installing Acrobat Reader, I may instead send you a link to an online version of the document. This is stored in Adobe's Document Cloud, and can be edited directly in

any web browser. No installation required, although you do need a free [Adobe.com](https://www.adobe.com) account, and you do need internet access while editing. Other than how you navigate to the document to open it, and the range of tools available (online tools are more limited than the installed Acrobat, at least as of 2020), the way you markup the document is the same.

VIEWING THE DRAFT

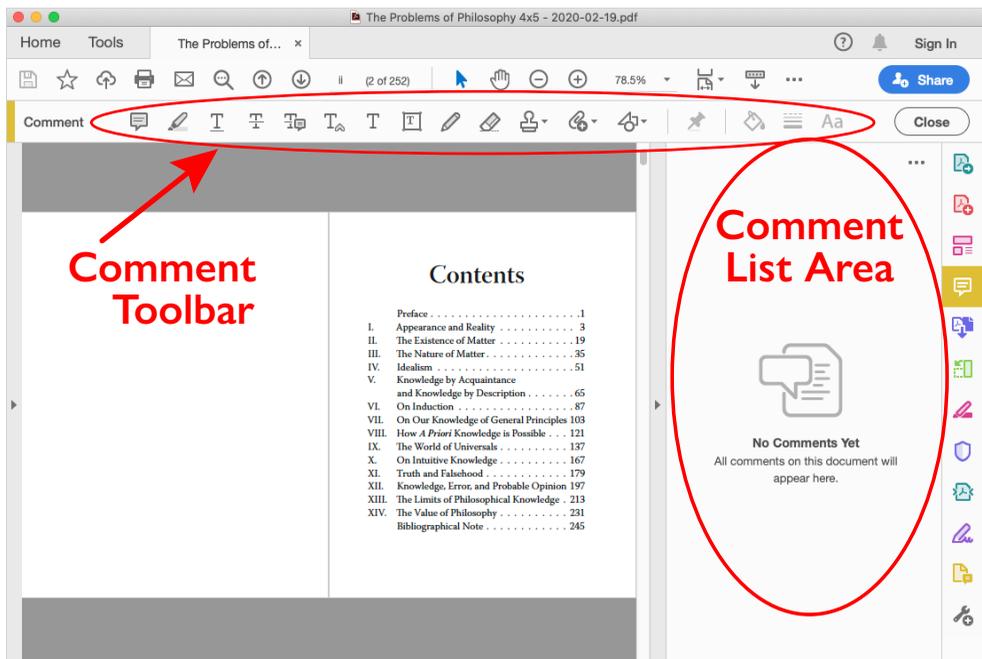
If you have the screen for it, you can easily view an entire spread, just as if you were looking at the printed proof. From the View menu, select “Two Page View” and also be sure to turn on “Show Cover Page in Two Page View” (otherwise your verso and recto pages will be in the wrong place, assuming the pdf starts with a recto page).

If you don’t have a big enough screen to comfortably view the entire spread, no problem. Just leave it on single page view or set the **View > Zoom** view to whatever is comfortable.



Viewing the draft in “Two Page View” with “Cover Page” mimics the normal book spread view.

TURNING ON THE COMMENT TOOLS





To make markup and view comments, you need to turn on the Comment Panel. Clicking the yellow stylistic thought bubble will toggle the comment panel and tool bar on or off. You can find it on the list along the right side of the screen; under the Tools tab found by clicking “Tools” near the top left of the screen; or under the **View > Tools > Comment > Open** command in the menu bar.

You know that you are in the Comment Panel because of the Comment Toolbar, the Comment List Area, the word “Comment” on the left of the toolbar, and the Comment icon highlighted in the tools panel on the far right of the page. And I swear, I will never use the word *comment* that often again!

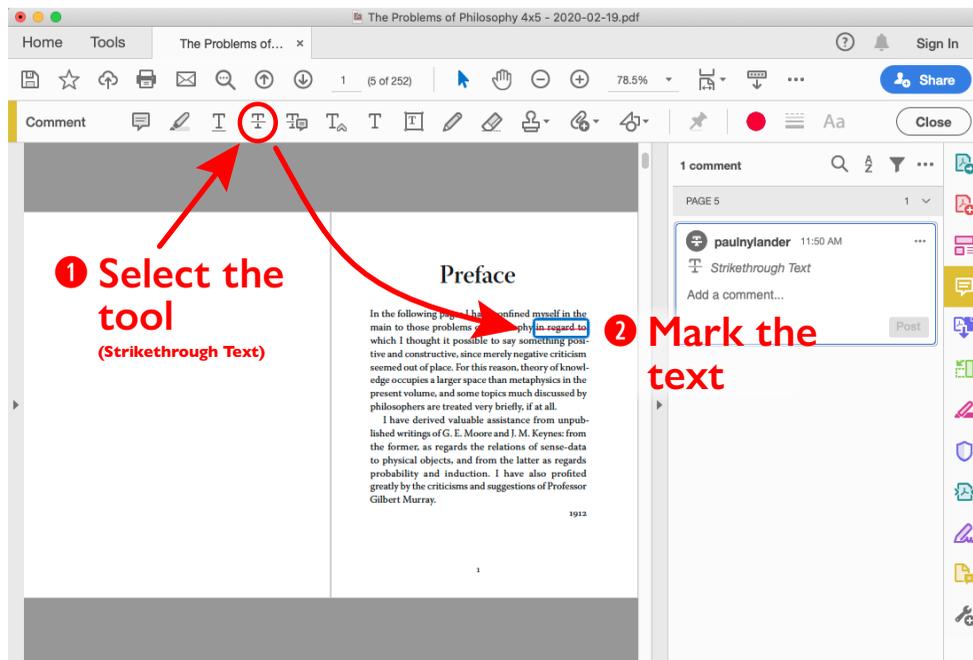
SECOND STEP: LEARN TO SPEAK ROBOT

There are a lot of tools in this toolbar, but the ones we’re most interested in are the middle three, the **text markup tools**, each icon a variation of the capital “T”

Say that you want to make a suggestion of deleting a few superfluous words. You scroll to the page, select the tool, mark the text, and (optionally) add a comment.

That is the basic process for using all three text markup tools, **strike through** (delete), **replace**, and **insert**: select the tool and either select the text (for strike through and change) or click to place the cursor (insert).

1. Select the tool
2. Mark the text
3. Add a comment (optional)



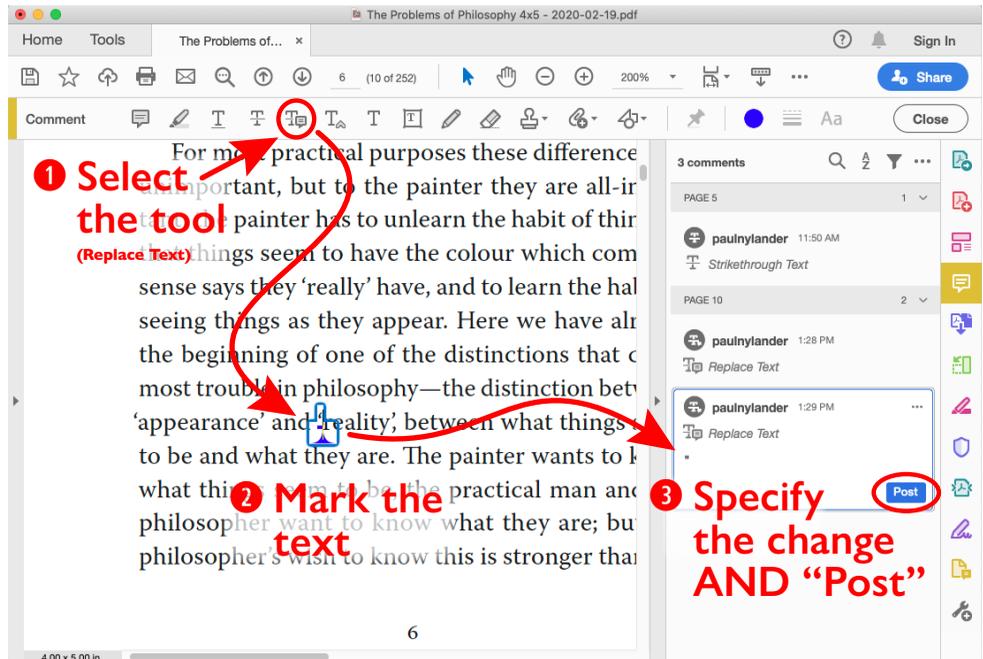
Strikethrough

The **Strikethrough Text** tool is used to mark text to be deleted.

In this example, we've marked the words for deletion at the end of the second line of the preface. So, start by selecting the **strike through text** tool then mark the text to be removed.

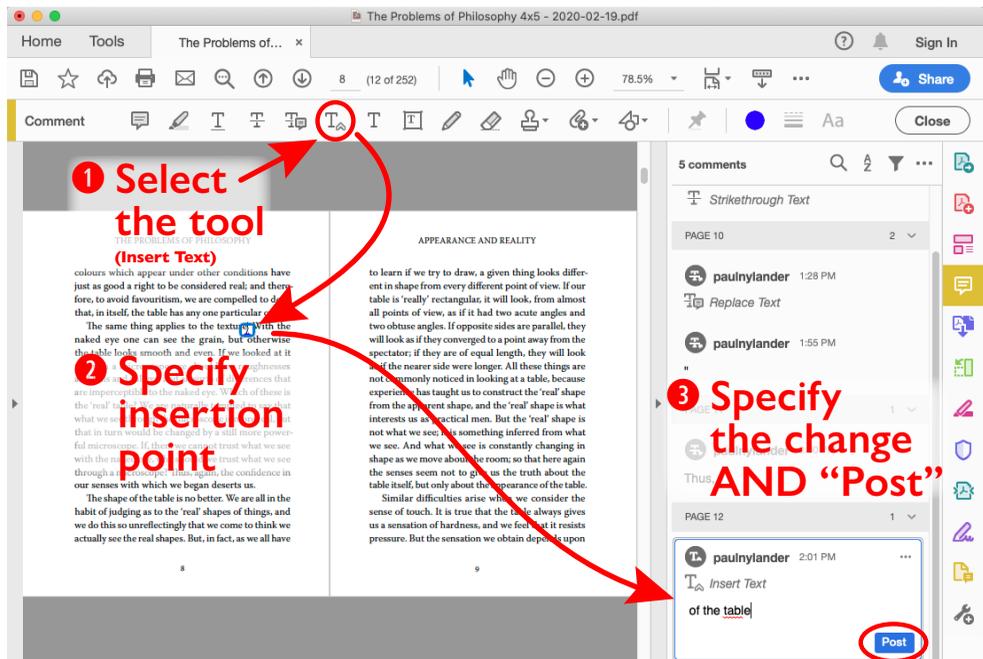
It should be noted that the inserted text (for either the change or insertion) is

Replace Text



Replacing text (i.e. delete and insert).

Insert Text

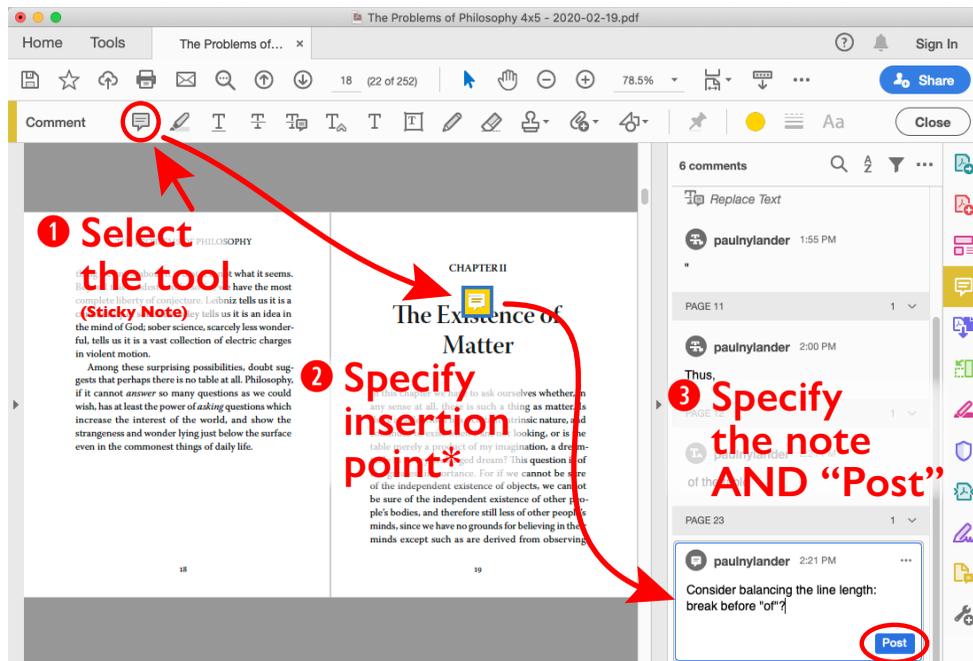


Inserting new text. NB: the insertion is literal, spaces have meaning.

literal: if a space should be included, you should include the space in the insertion note (such as before “ of . . .” in the example).

The “Post” button may or may not be automatically selected when moving to your next comment. Good practice is just to get in the habit of clicking it. Also of note, you may be able to set the cursor position first, and then select a tool ② → ① → ③. As with most software, there are many ways to accomplish the same task, although rarely consistently.

STYLES AND NON-LITERAL COMMENTS




Add Sticky Note

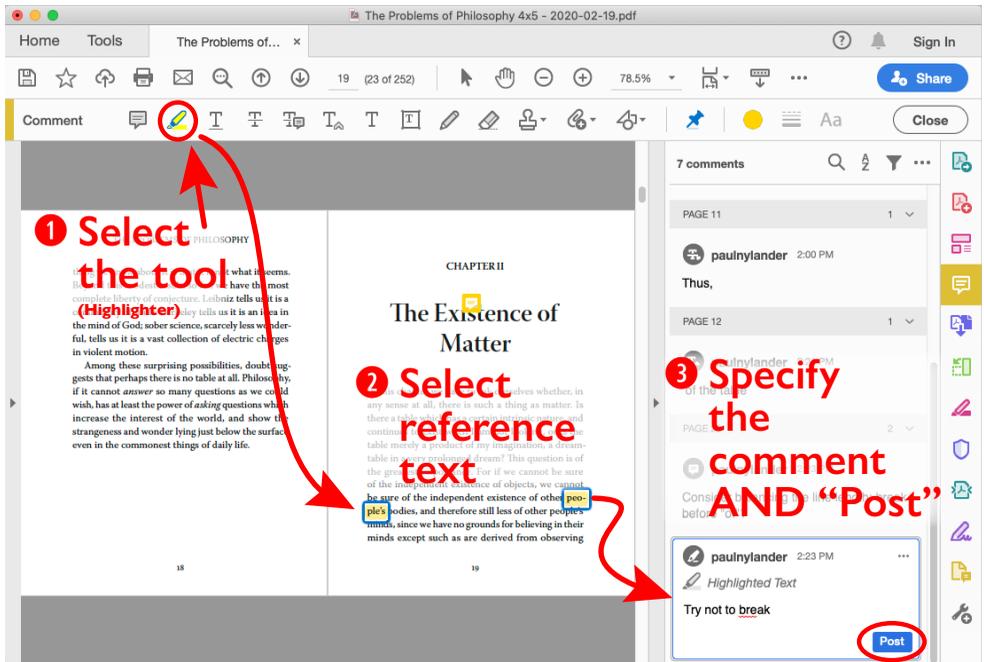
Add a **sticky note**. Like the real yellow notes from here in Minnesota, these should be used sparingly and only to indicate general comments, NOT text specific edits. *) Placement, like a real sticky note, should be considered approximate and subject to change.

The other two tools you may find useful are the **note** and the **highlighter**. These indirect comment tools shouldn't be abused: use them only when making broader, stylistic changes or general comments. For example, a general formatting comment, or a note about something to be considered in a wider context than text-specific edits.

NOTICE THE SIDE PANEL

All the while we've been making comments, the side panel has been filling up with a page sorted list of changes. Acrobat automatically keeps this list in order, and has been automatically marking the markup with your name, initials or whatever you used to identify yourself when you installed the software.

If another person adds markup to the same document, their changes will interspersed with yours. The filter (funnel) icon at the top of the note panel allows you to modify whose notes, and which types of notes are seen here. If you want.



The **highlighter** is especially useful for indicating text-specific formatting or style change (italics/roman switch, bad break, etc.).

ALWAYS REMEMBER: SAVE YOUR COMMENTS!

Like any piece of software, you have to **save the document** to retain your changes. I generally recommend using **File > Save As...** the first time, to avoid overwriting the original and to add something to the end of the filename indicating who has edited it (initials in parenthesis are great).

	Text Box		Cloud
	Underline		Arrow
	Text Comment		Connected Lines
	Text Callout		Highlighted Text
	Strikethrough Text		Line
	Sticky Note		Rectangle
	Stamp Tool		Insert Text
	Replace Text		Pencil

PDF Comment tools supported by InDesign import.

WHAT ABOUT ALL THOSE OTHER TOOLS?

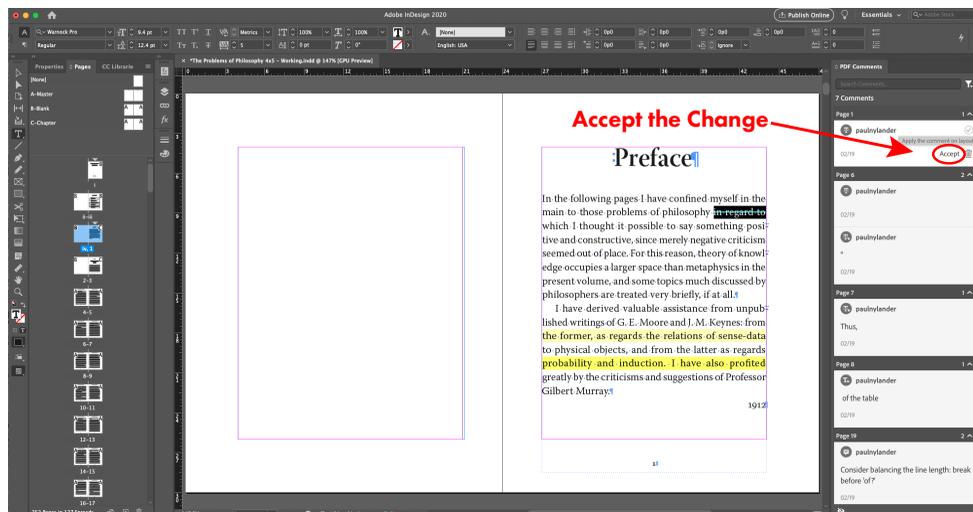
Knock yourself out if you want to explore the other commenting tools. Mostly they are for drawing little pictures, adding text notes on the page itself and other functionality that we don't really need for proofreading. But if it makes you happy, by all means proceed.

For reference, the table below shows all the tools that InDesign is aware of and will attempt to map when reimporting the commented pdf.

THIRD STEP: IMPORTING & APPLYING COMMENTS

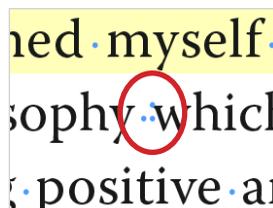
This isn't actually a step you need to worry about. But if you are curious, here is an overview of what happens when I received your annotated pdf back. Remember that to this point, just like written markup, your comments are *suggestions* for what should be changed. Those comments need to be interpreted and applied in the design software.

On the right side in the following screen shot you can see where I've docked my "PDF Comments" panel—and after importing, there are the comments just like you saw them in Acrobat.

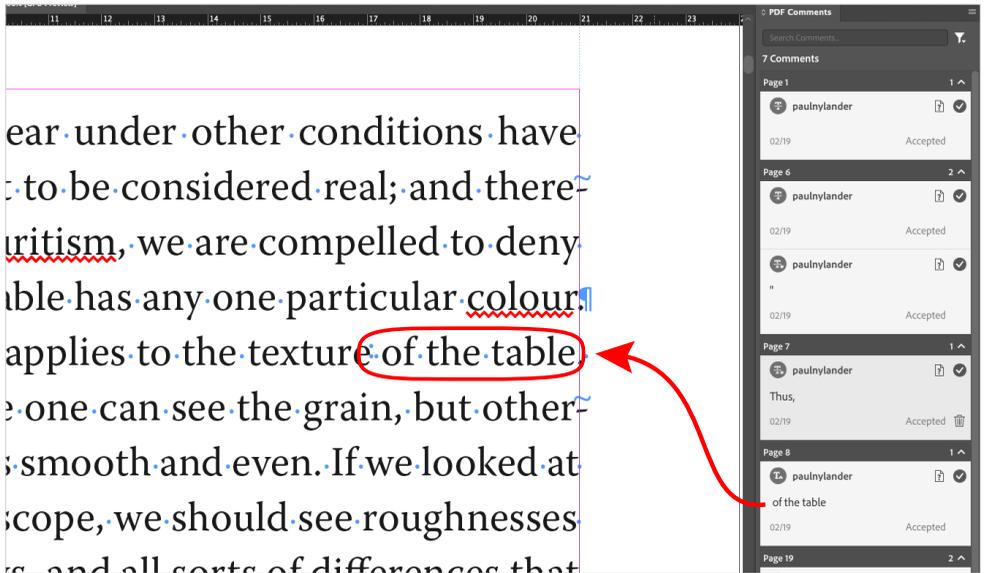


The PDF Comment panel in InDesign looks just like the comment panel you saw in Acrobat. I will step through your comments one by one, accepting the literal (text change) comments, all the while keeping an eye on changes caused by these edits, such as unintentional reflow.

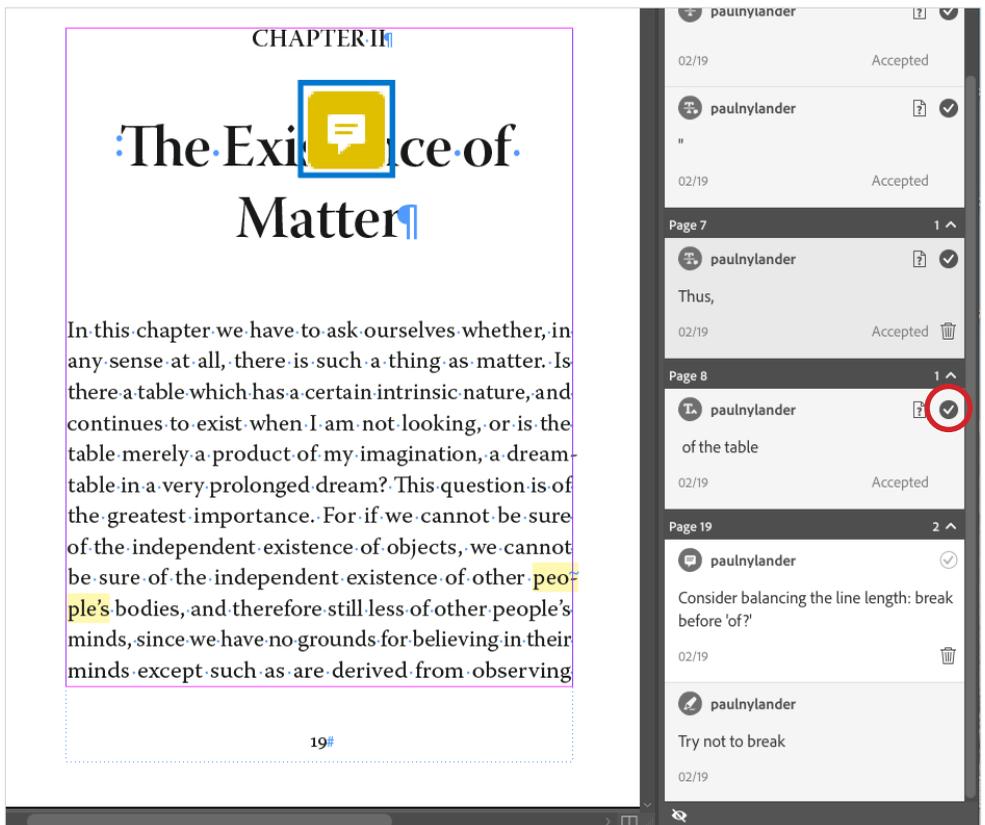
Once I click "Accept" the change is made, and the comment is marked as "Accepted." If you look close, you'll see that a light blue colon-like character has been inserted in InDesign; it is NOT an extra space, but a hidden character. While it doesn't influence the appearance, it is used internally to keep track of where the requested change had been.



I also want to show you the result of my earlier comment that insertions are *literal*. If you look close here where we wanted to insert the text "of the table" between



Remember: text insertions are literal. In this case, because the proofreading edits included the preceding space it was properly inserted between "texture" and its trailing period.



Notes and highlighting as seen in InDesign.

“texture” and its trailing period. I included the space before “of” in my change and, as you see, there is a space inserted after the light blue colon. If I had forgotten this, the change would have read “textureof. . .” Not the end of the world, as it would be flagged as a misspelling and I *likely* would have caught it as I stepped through the changes (another reason why an automated solution isn’t to be trusted). But best to be accurate.

By the way, wondering about those indirect corrections? The screenshot on the previous page shows how they look to me in InDesign. . . . Notice that the actual icon for the note shows up slightly different (larger, in this case), so its position is only *approximately* what you originally indicated. This is why notes are a terrible way to indicate text changes. (Imagine you put a note saying “delete this word” instead of using **strike through**. Since the position of the note may shift from what you placed to what I see, I really have no way of knowing exactly which word you would have wanted deleted. Yikes!)

Highlighted text is clearly marked, and is a stronger way of indicating a specific, but non-literal, change. Although neither of these have an “Accept” function, because there isn’t anything explicit to be done, there is a little checkmark in the upper right of the note, which I can use to indicate that the change has been handled.

CONCLUSION

You can see, what this digital markup does is to shift some of the workload from the designer to the proofreader. Is that fair? Well, I guess it depends on who is being paid to do what. But from the standpoint of entering markup, this is faster for the typesetter and, in theory at least, more accurate. But I suspect it is a bit more work for the proofreader as compared to getting out the red pen and letting the ink fly. Still, saves a printout . . . and that is worth something.

COMPATIBILITY

PDF created with InDesign CC 2019 and later.

Acrobat Reader “DC” May 2019 and later recommended (although earlier version support comments, they’ve been enhanced and simplified in 2019.) You can get Acrobat Reader (you do NOT want the Acrobat *Pro* Trial) at get.adobe.com/reader/.

REFERENCES

helpx.adobe.com/acrobat/using/commenting-pdfs.html

helpx.adobe.com/indesign/using/import-pdf-comments.html

indesignsecrets.com/import-pdf-comments.php (subscribers only)

PROOFREADER MARK TO PDF COMMENT EQUIVALENTS CHEAT SHEET

	delete; take it out		strikethrough text to delete
	close up; print as		strikethrough text to delete
	delete and close up		strikethrough text to delete
	let marked <u>text</u> stand as is		delete the comment*
	insert here; or sub/superscript		insertion. Note sub/super w/
	insert a space		insert space
	space evenly where indicated		notate spacing request
	insert hair space		notate spacing request
	indent or insert an em space		notate spacing request
	letterspace		notate spacing request
	begin new paragraph		notate spacing request
	line break. Start a new line		notate spacing request
	run in text; no new line		notate spacing request
	transpose; change order the		type corrected version
	spell out (5 lbs. as five pounds)		type corrected version
	set as a ligature (ae as æ)		type corrected version (or)
	move to the left		notate spacing request
	move to the right		notate spacing request
	center the text		notate spacing request
	move up / move down		notate spacing request
	flush left flush right		notate spacing request
	align horizontally, or vertically		notate spacing request
	set in caps (CAPS) or small caps (SMALL CAPS)		notate style request
	set in lowercase (lowercase)		type corrected version
	set in italic (italic) or roman (roman)		notate style request
	set in boldface (boldface)		notate style request
	correct wrong font (wrong font)		notate style request
	insert comma and period, etc		insert punctuation
	insert hyphen, endash, emdash		insert punctuation
	parenthesis, brackets, quotes		insert punctuation
	query to author/designer		(or) write your question

* Please don't try to use Acrobat's "Set Status" fields; they don't transfer.

