ABC PUBLISHING

Training Module

Adobe Acrobat PDF Markup for Beginners

Version

Contents

[Introduction 3](#_Toc127453700)

[Why Learn PDF Markup? 3](#_Toc127453701)

[Marking Up Text 3](#_Toc127453702)

[Proofreader’s Marks 4](#_Toc127453703)

[Figure 1.1 4](#_Toc127453704)

[Gathering What You Need 5](#_Toc127453705)

[Getting Started 5](#_Toc127453706)

[Figure 1.2 Sample Markup 6](#_Toc127453707)

[Designing Text Boxes 6](#_Toc127453708)

[Changing the Font of Text Boxes 6](#_Toc127453709)

[Making Markup Easier 7](#_Toc127453710)

[Figure 1.3 Editorial Stamp Set 7](#_Toc127453711)

[Figure 1.4 Stamp Set in Action 7](#_Toc127453712)

[Installing a Stamp Set 8](#_Toc127453713)

[Going Forward 8](#_Toc127453714)

# Introduction

Marking up PDFs is a common and essential part of page production in the creation of print and digital products. With PDF markup, editors can communicate clearly with Design and Production in order to create stellar texts that meet the needs of various audiences.

# Why Learn PDF Markup?

Historically, marking up page proofs was done with pencil or pen, often in red or some other noticeable color. Writers and editors produced a manuscript which was then set by Production and then went through several rounds of editing printed page proof to perfect the text. Today, markup still happens, but the process is mainly digital. In fact, some books are created completely online with writers and editors working in programs such as Adobe InCopy to work in sync with Design and Production teams. At the same time, there are still many instances when a more traditional approach is appropriate and needed. This is the position that marking up Adobe Acrobat PDFs holds. PDF markup:

* is done on the computer
* uses traditional proofreader’s marks
* can be transmitted and stored digitally

The advantage the PDF markup has over a completely digital process is documentation. With PDF markup, each stage of page proof has files that show exactly what changes have been requested and by whom. Texts that are created with a digital process may not provide this information as easily or at all. Therefore, some publishers prefer to use PDF markup in order to have the record of changes—and the possibility of easily restoring earlier versions of the text.

# Marking Up Text

Traditional markup and PDF markup are connected by proofreader’s marks. These are the “code” that editors use to communicate clearly. It is important for editorial, design, and production teams to all use and understand the same proofreader’s marks in order to avoid confusion. Of course, with the advent of digital processes, there has been some drift away from traditional proofreader’s marks. Therefore, while it is important to know and use the marks, the most important thing is to be clear. If being clear means writing a note or providing other references, then that is the path editors should take. See **Figure 1.1** showing proofreader’s marks as presented in the Chicago Manual of Style, 17th Edition. Note that Chicago Manual of Style uses M and N, but many companies use 1/M or 1/N to indicate an m-dash or n-dash.

# Proofreader’s Marks

### Figure 1.1

A picture containing text

Description automatically generated

# Gathering What You Need

Aside from your knowledge of proofreader’s marks, you will need the following to perform PDF markup:

* Desktop or laptop Computer, either Macintosh or PC
* Adobe Acrobat program—now available in subscription models from Adobe. Acrobat Professional provides the most options for markup, but Acrobat Reader will also allow you a more limited markup capability
* PDF file that you want to markup

# Getting Started

Open your PDF file to try doing some markups. Follow these steps:

1. Open PDF, and then look at the side column and select the COMMENT to pull up the Tool set.
2. Examine the tool set. It will include options to:

* Add a sticky note.
* Highlight text.
* Underline text.
* Strikethrough text.
* Add note to replace text.
* Insert text at cursor.
* Add text comment.
* Add text box.
* Use drawing tool.
* Erase drawing.
* Add stamp.
* Add new attachment.
* Drawing tools.

You can experiment with all of the tools, but to add comments to PDFs for a publishing situation, you are most likely to be using **a–d,** and **h–m.** The reason that you don’t do what is called “inline editing” is that it is far more likely to be missed by Production. The marks are small and the Production crews are working very quickly. Editorial marks need to be OBVIOUS and CLEAR. You will want to use the:

* drawing tool to indicate additions and deletions
* text box tool to write notes to production or add complete words
* drawing tools to circle text or add a box or shape
* drawing tools to create “text callout” box with an arrow

1. Don’t forget to use < > or [ ] to indicate that the material should not be set)

Try it in your own file. It does take a bit of practice, so don’t get discouraged. Using the drawing tool with a mouse can be awkward at first. Look at **Figure 1.2** on the next page to see how a markup might look using various tools. Notice that you can change the color of your text boxes to make them stand out. Read the next section to find out how.

### Figure 1.2 Sample Markup

Graphical user interface, text, application, email

Description automatically generated

## Designing Text Boxes

As mentioned, you can adjust the color of the interior and border of your text boxes as well as the font. Certain companies will require different groups to use different color boxes to facilitate quick reviews. To adjust your text boxes, do the following:

1. Create a text box in your pdf.
2. Click on the text box and in the Tool Bar, you will see a circle.
3. Click on the circle and you can choose the interior color.
4. You will also be able to choose the border color.
5. To take it a step further, click on the Settings wheel in the color box. This will open up a Text Box Properties box.
6. In the Text Box Properties box, check the Make Properties Default box in order to make sure every one of your text boxes looks the same. The click OK.

## Changing the Font of Text Boxes

It is easy to customize your text box base on specifications. Follow these steps:

1. Double-click on a text box in your PDF.
2. Notice that a text box has opened up with text options.
3. Choose your font, size, text color, and whether you want the text to be flush left, centered, flush right, or justified. You can also apply styles such as boldface to your text.
4. If you are able to Right-Click on your mouse, you should get a menu that allows you to make the font properties default.

# Making Markup Easier

As with pen and pencil markup, PDF markup can be time consuming. Therefore, it is important to take advantage of time saving devices. For PDFs, one way to do that is through Stamps. The Stamps Tool was originally a way for people to indicate various business communications. For example, you can add a stamp indicating that something has been Approved, Completed, Not Approved, or Confidential. But, for the editor, it is Stamp Sets that make the biggest difference. See **Figure 1.3** for an example of an editorial stamp set.

### Figure 1.3 Editorial Stamp Set

Text, whiteboard

Description automatically generated

Source: Houghton Mifflin Harcourt Stamp Set

Once you have installed a stamp set, you can use the Stamps instead of the Drawing Tool to do a lot of your markup. If you click on a Stamp, you can then place it where you like on a page—and also move it or make it larger or smaller. See how various Stamps have been used in **Figure 1.4**. Of course, it is a hybrid situation. Sometimes it is easier to draw or insert a comment and sometimes it is clearer to use the Stamps. Try this with the Standard Business Stamps that you should be able to access with all PDFs.

### Figure 1.4 Stamp Set in Action

A picture containing timeline

Description automatically generated

## Installing a Stamp Set

The hardest part of using a Stamp Set may be choosing the set to install. Luckily, you can install multiple sets to use as needed. Many publishing houses will have their own sets of stamps that they distribute to employees. However, there are also sets available to purchase online. For example, a set of 60 Editorial Stamps is available here <https://exchange.adobe.com/apps/cc/100535/editorial-markup-stamp-library-for-acrobat>. Adobe also provides instructions for installation. Installation instructions differ for MacOS or Windows 7–10. The basic installation consists of:

1. Downloading the Stamp Set
2. Identifying the folder where the Stamp Set needs to live.
3. Opening the Stamp Set through the Tools and Stamps menu when you open a PDF.

# Going Forward

You now have the basic information needed to perform PDF markups. What might be missing is more practice. It will get easier and start to feel more natural as you work through PDFs and add your edits. There are more things to learn, but practicing the basics will get you ready for advanced procedures. These include importing and exporting comments, attaching patch files for sections of text that need to be replaced, and troubleshooting PDF issues.