How to Mark up PDF Files Using Annotations Tools in Adobe

You can use Adobe Acrobat annotation tools to mark up your Acrobat PDF files, similar to the Track Changes and Comments features in Microsoft Word. Add text boxes, format text, and insert sticky notes, shapes, or freehand drawings with the pencil tool. You can also add Sticky Notes (comments), or highlight, insert, and delete text: these are the tools you'll need most often for the Editors Canada professional certification exams, so that's what we'll concentrate on here.

Ensure you have at minimum Adobe Acrobat Reader DC installed on your Mac or PC. (If you have the subscription versions, Adobe Acrobat Standard or Pro, that's fine, too! If you're wondering about the differences between the versions, there's a comparison here)

Download Adobe Acrobat Reader DC for free from https://get.adobe.com/reader/ .

Best Practices

This document includes full instructions on using each of the annotation tools; first, here are some general best practices to make everyone's lives easier!

It's important to remember that annotation tools don't *change* the text in the PDF file — they just add markup to a PDF file to indicate where and what changes should be made to text in the source file (which may be in layout software like InDesign). With this in mind, think of the marker of the exam as a typesetter, who is trying to understand what changes that you, the proofreader, would like made to the text in the source file.

Keep it Simple

Try to be clear and concise: use the simplest, fewest annotations that you can, to avoid clutter in the file and confusion on the part of the marker (or typesetter or production person, if this was real life).

For example, if you need to replace a word, don't delete the existing word and then insert the new word—this will result in 2 annotations and can be confusing. Instead, just double-click the word you want to replace and start typing; this results in 1 annotation.
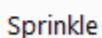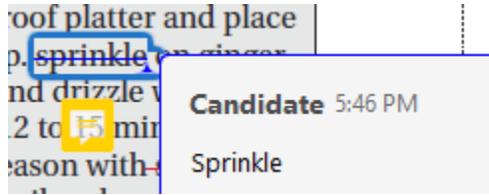
Example:
Change made using 2 annotations:
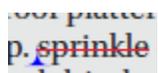
The same change, made using 1 annotation. Note how the new word has simply been typed over the existing word:


Use Sticky Notes for Instructions

The insert tool (the blue "carat") is generally used to show text that needs to be inserted. If you use it to indicate instructions to the typesetter, there is a danger that your instruction could be misconstrued as actual text to be added:
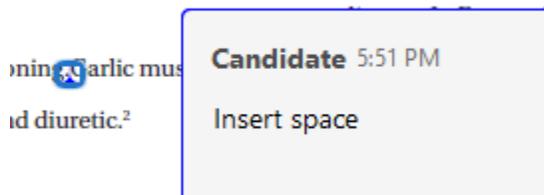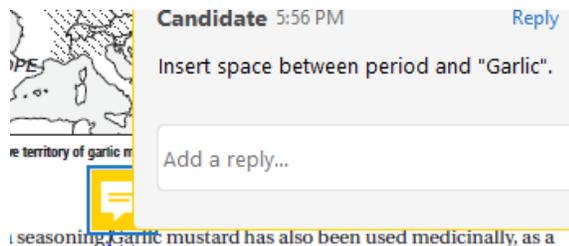

A sleepy typesetter might change this to "seasoning.Insert spaceGarlic"!

In this case, it's better to simply highlight the section you're referring to, then leave a comment (yellow Sticky Note) containing the instruction.
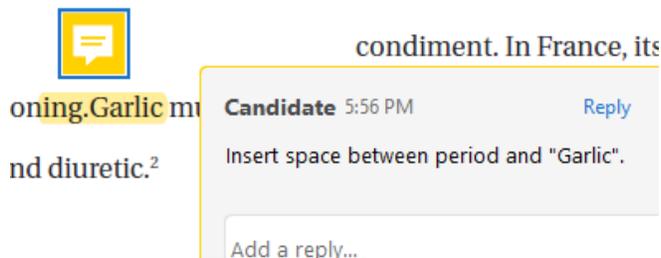
Alternatively, you could type in a space using the Insert tool, and then leave a comment containing the instruction, if you wanted to be clear.
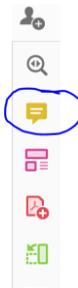
## Detailed Instructions for Using Annotations

The Comment Tool

Open a PDF in Adobe Acrobat and then open the Comment tool. There are a couple of ways to find the Comment tool.

- Click on the yellow sticky icon in the vertical panel to the far right of your screen (the order of your icons may differ):

- Or on the top menu bar, click View > Tools > Comment > Open
- Or click the Tools tab, scroll to the Share & Review subsection, and then click Comment
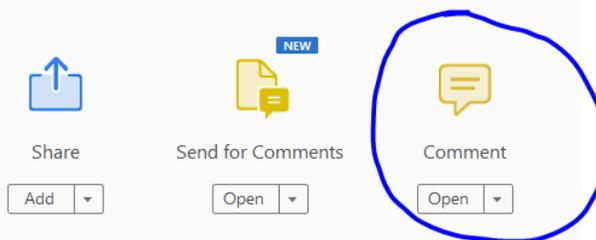
The Comment tool will open, with a wide panel at the right of the screen.

Click the small black arrow (circled, below) to minimize the panel to the right, if you need more screen real estate! To open the panel again and view your comments and annotations, simply click the black arrow once more.
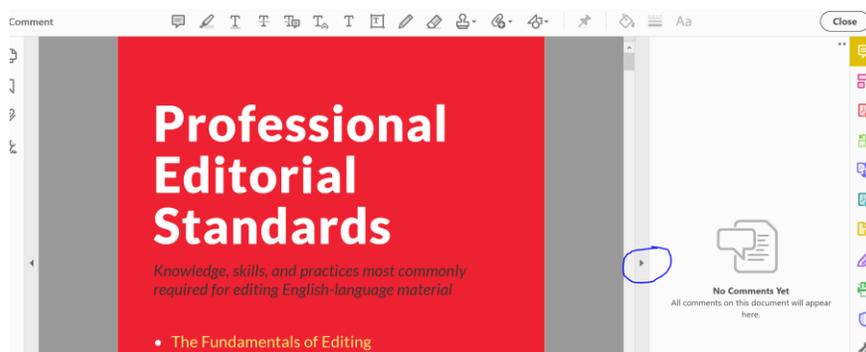
Note that below, we've demonstrated how to delete annotations within the main text, but you can also right-click on any annotation in the Comment Tool and delete it there (as well as copy the text or edit it).
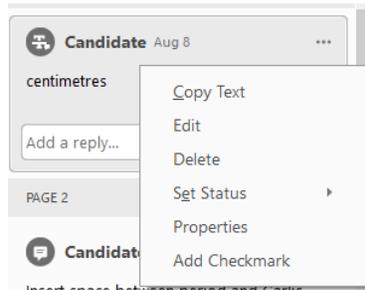
Insertions and Deletions

To be able to insert and delete annotations, ensure that you've clicked on the Selection Tool at the top of the screen (the arrow, shown below – again, the order of your icons may be a little different):

- To delete: simply double-click on a word or sentence to select it, and press delete or backspace on your keyboard. A red line will appear through the deleted word, and the action will appear in the side Comment panel (if you haven't minimized it).
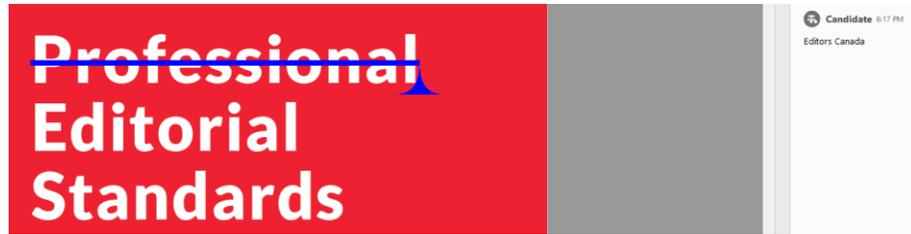

In the example above, you are instructing the typesetter to delete the word "Professional".

If you want to remove the deletion again, click on the red strikethrough to select it. A box will appear around it, indicating that the annotation is selected.


Hit the "delete" key on your keyboard (not backspace!), and the red strikethrough line will disappear.

- To add text: there are a couple of ways to do this.
  - To replace text: Just double-click to select the text and start typing! That will "cross out" the existing text and show the new text to be inserted instead:

In the example above, you are telling the exam marker (or typesetter) that you want the heading to be changed to "Editors Canada Editorial Standards".

- To insert text: Place the cursor where you want to insert the text and start typing!
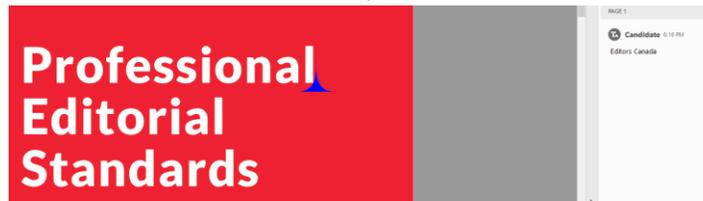
In the example above, you are telling the exam marker (or typesetter) that you want the text to be changed to "Professional Editors Canada Editorial Standards".

If you want to remove this new text, click on the blue strikethrough or blue "insert" symbol to select it. A box will appear around it, indicating that the annotation is selected:
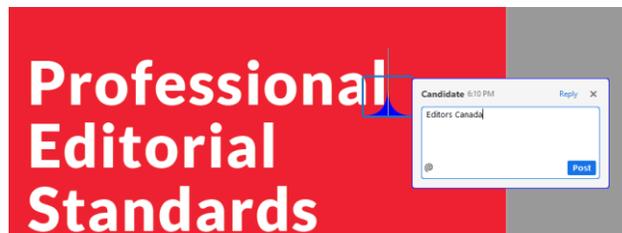
Hit the "delete" key on your keyboard (not backspace!), and the blue strikethrough line or blue insert will disappear.

Highlighting

Some of the exam questions will ask you to highlight the correct answer, or you may wish to draw the exam marker's attention to an error.

The Highlight Text tool can be found on the Comment toolbar – shown circled in the image below. Handily, it looks like a highlighter!

- Select the word(s) you wish to highlight by double-clicking it, then click the Highlight Tool. The text will be highlighted in yellow:

- If you want to remove the highlighting, click on the yellow highlighting to select it. A box will appear around it, indicating that the annotation is selected:

Hit the "delete" key on your keyboard (not backspace!), and the yellow highlighting will disappear.

Note: Sometimes the Highlight Tool remains "on." To turn it off so you can return to inserting and deleting text, click on the Selection Tool at the top of the screen again:
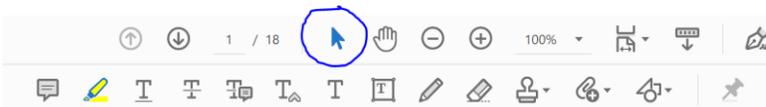


Inserting Comments with "Sticky Notes"

Use Sticky Notes to insert comments (queries to the author or instructions to the typesetter). Confusingly, the Sticky Note tool looks a little like the Comment tool (it's also a yellow dialogue bubble!), but it can be found on the Comment toolbar (again, your icons may be in a different order):


To add a Sticky Note, select the Sticky Note tool. (You can also right-click in the document in the place where you want to add a Sticky Note, and select Add Sticky Note.) Your cursor will change to a "dialogue bubble."

Click in the document where you want to add a Sticky Note, and start typing in the pop-up box.
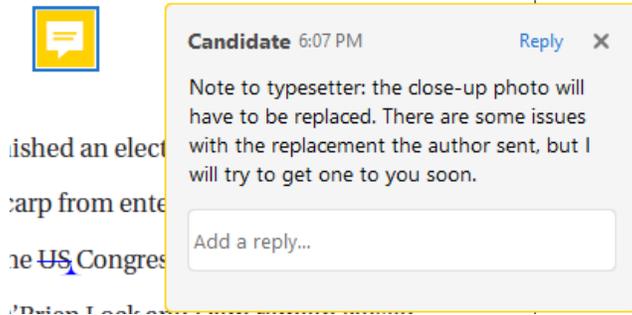
If you want to be very clear, you could highlight text, and then add a Sticky Note:
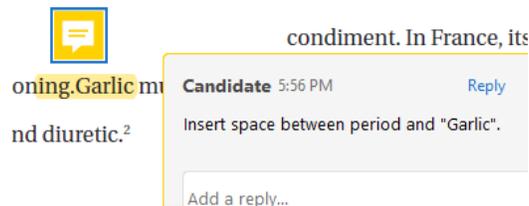
You can drag Sticky Notes around to place them where you need to. You can also drag the dialogue box around, if it's in your way. And if the open dialogue box is blocking your view, click the "x" to close it (this will not delete it).
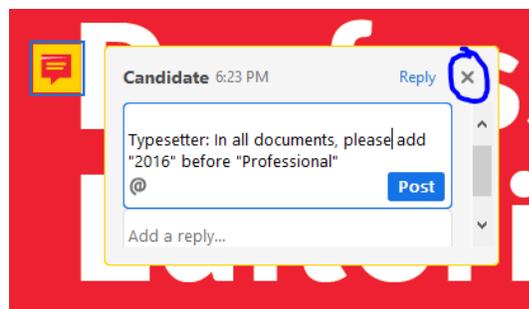
If you want to delete a Sticky Note, click on it to select it. A box will appear around it, indicating that the annotation is selected:

Hit the "delete" key on your keyboard (not backspace!), and the Sticky Note will be deleted.