

Tips for Editing PDF Documents

QUICK HELP

BASIC

EXPANDED

PROFESSIONAL

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This aid, adapted from Chapter 7 of *The McGraw-Hill Desk Reference for Editors, Writers, and Proofreaders* book and CD (McGraw-Hill, 2006, K.D. Sullivan and Merilee Eggleston) includes all the information, screenshots, and examples from the book, plus additional information and tips that were cut from the book because of space limitations. It's kind of like getting a DVD with additional scenes that weren't in the original movie.

You'll learn about some of the differences between editing an MS Word file and a PDF document. You'll find tips to help you choose and use key editing tools, the options available for comments and printing, and different methods of returning your edited projects. This aid certainly doesn't include every way to do something, just the way or ways we've found useful.

Notes

1. To mark changes in a PDF file, you'll need the full Adobe Acrobat program. Acrobat Reader is true to its name—it will let you view a file and print it, but little more.
2. **Version alert:** The information in this aid—especially about individual tools—is based on Adobe Acrobat Version 7.0 Standard. If you're working with a different version, you may need to dig a bit to locate a particular tool or feature. And if your version is old enough, certain features might be missing. But for the most part, you should be able to find what you need with just a little hunting.
3. If you're not familiar with the full Adobe Acrobat application, this aid will be easiest to follow if you have the full Adobe Acrobat program up and running as you read.



Editing PDF Documents

Most electronic files are easy to alter. That's the good news and the bad. Good if you're writing or editing one, bad if you want to safeguard your original content. For instance, if you send a Word or Excel file into the world on its own, unprotected, almost anyone can rework it, intentionally or otherwise. If you're a lawyer or accountant, the mere thought makes you cringe. So more and more, especially in business and professional settings, writers and designers are preserving their exact words, formatting, and art by saving files as Adobe Acrobat Portable Document Format (PDF) files.



A file saved as a PDF will appear exactly as its creator intended it to, regardless of who reads it or what platform displays it (Windows XP or Vista, Macintosh OS X, etc.). And except in very limited ways and under very specific circumstances, no one else can directly alter that file without special permissions, such as for filling in blanks in a form. Any substantial changes to the material must be made in the application used to create the work in the first place, not in Adobe Acrobat.

For that reason, editorial review of a PDF poses special challenges. You can't just pull up the file and start inserting and deleting text, the way you would in a Word file. But your hands aren't entirely tied. Acrobat may be a great guardian of content, but it *does* allow you express your editorial self. There are tools—some more convenient than others—that let you ask questions, suggest changes, and insert editorial marks.

Like a fat Swiss Army knife, Acrobat has a few tools that are indispensable and a lot more you *might* use, sometime. In this chapter, we won't cover every screwdriver and bottle opener, but we will show you all our editorial standbys—and a few other handy gadgets as well.

Tip: It's supremely simple to create a PDF file. In most word processing, presentation, and spreadsheet applications, you have only to click the button or choose the option that lets you save your file as a PDF, and then give that file a new name. You now have a PDF.

And if you want to restrict who can print or even open your document, go to Documents > Security > Show Security Settings for This Document. Choose the Security tab. You'll see a drop-down menu titled Security Method. The default is No Security, but choose Password Security, and you'll find several ways to keep trespassers out.

Different Routes, Same Destination

Whether you're reviewing a Word file or a PDF, your job is still the same—to ensure that the content is correct, consistent, and clear. Here is a PDF file, as it appears in Acrobat 7.0, with some strategically inserted errors we'll ferret out later (thanks to Sandra and Cesar Estrada for the use—and abuse—of their web page):





When you receive a PDF file for editing, you should treat it as you would any other electronic file—save it to your hard drive, preserving a clean copy of the original. Then use Save As to create your working copy, renaming it to indicate that it's an edited version. At that point, you have several options. You can:

- Print out the file, mark your changes on the hard copy using standard editing marks, and fax back the changes
- Add your changes, suggestions, and queries to the electronic file, using one of Acrobat's built-in tools, and return the edited file electronically
- Do a combination of the two

Each of these approaches has its merits, depending on the situation. Let's look at them.

Working on Paper

There are several reasons to mark changes on a hard-copy printout of a PDF:

- *You prefer to mark changes on hard copy.* Some people feel they simply do a better job of catching errors when reviewing a hard copy.
- *The person who will receive your work prefers to see them that way.* Some people on the receiving end are more comfortable with hard copy, too.
- *You've been asked to fax the changes to whoever has requested the work.* Some people prefer you to fax changes to them, and that requires a marked-up hard copy, because in most cases, fax transmission requires a paper

original. Also, if you know you'll be faxing changes, you can take steps on a hard-copy document to make sure they are especially legible.

Marking Changes on Hard Copy. If you're working on hard copy, be sure to manually number the pages if page numbers don't already appear. You'll often return your corrections by fax, so mark changes very clearly, using standard editorial marks. Place any queries directly on the page, not too close to the edge. In fax transmission, material on page edges is sometimes lost or illegible.

If there isn't room to write everything clearly on the printout, create a separate sheet for changes and queries, and simply note on the hard copy of the PDF page where the insertion or change belongs. On the separate changes/queries sheet, clearly indicate the location on the page where each change goes. One way to do that is to number the changes and place corresponding numbers on the PDF page printout.

Working on Paper *and* Onscreen

Sometimes, you might want to *review* the contents of a PDF on hard copy, but *mark changes* to it electronically. That's not as odd as it sounds. This split approach can be useful if your changes need to appear in the electronic file, but:

- ***You feel you're better at catching errors in hard copy.*** As noted above, some people think they are. If that's you, don't fight it. Work in the way that makes you most comfortable.
- ***The PDF is exceptionally large or complex.*** If it is, it may be more efficient to view all the text on a page at once instead of zooming in and zooming out, or zooming in, then constantly scrolling up, down, right, and left because the whole page won't fit on your screen.
- ***You need to compare the text of a PDF to another document.*** This could be a previous version in Word, for example, or another PDF. Or you may be reviewing, say, three documents that are very similar and you want to make sure the wording, graphics, and other details match in all of them.

Tip: If you plan to mark changes on hard copy and then transfer them to the electronic file, be *very* sure you don't miss a single squiggle. Account systematically for every change as you copy it. For example, put a check mark next to each change on the hard copy as you record it in the electronic file, and keep the hard copy until you're sure there will be no questions about what's on it.



Sometimes you might want to do the opposite. You might want to *review* the PDF in its electronic format, but *mark changes* on hard copy.

For instance, if you've been asked to return your changes by fax, and you're working on a file that includes small type, it might be easier to read it onscreen, so you can use Acrobat's indispensable Zoom feature (Tools > Zoom) to see these small things better.

Tip: Here's another trick to make tiny type easier to read:

1. Choose the Snapshot tool (more on using this tool later) to select one portion of text—for example, one column of text. This will copy text to the Clipboard.
2. Then go to Print. You'll see that under Print Range, the "Selected graphic" option is chosen.
3. Click OK, and now when you print, the selected text is enlarged to fill the entire page. Much easier to read (for both you and the person you're returning the changes to).

If you're reviewing onscreen and zooming in and out a lot, be careful not to skip any text that needs to be reviewed. In advertising brochures, for example, there might be three separate "spreads" (layouts) of text and graphics, all appearing on one PDF page.

If you need to zoom in to increase the size of small text, you may be seeing only one portion or one spread. When you return the file to the normal size, it's easy to lose track of where you left off reading. For situations like this, print out the file and use it in conjunction with the electronic version.

If you're reading the electronic file, you can also use the Find feature to quickly locate things that would be needles in a hard-copy haystack. When you come across a page that contains an error, you can print that page out and mark the change, then fax back only the pages that require revision (see "Print with Comments Summary" below).

Tip: If for some reason you need to fax your changes or email them separately from the PDF file, you might find it convenient to record the changes on separate electronic reporting form. (A sample electronic reporting form appears in the job aid *Editing Web Content—Expanded*.)



Working Onscreen Only

If you're indicating your changes in the electronic file, you'll quickly find that Acrobat shares some things with Word, but not others:

- Many of the main menu options are the same in the two applications. If you're familiar with Word (or anything else made by Microsoft) you'll see a lot of old friends on the menu bar. You'll also see some strangers.
- In Word, you can insert and delete text and graphics to your heart's content, using Track Changes to show what you've done. Acrobat contains nothing similar to Track Changes, and you can't simply add or delete text; in most cases you must suggest changes by inserting a comment, near but not in the text.
- In Word, you can check spelling and grammar in both comments and text with the click of a button. In Acrobat, you can do it in one place but not the other (more on that under "Check Spelling," below).

Acrobat does contain Text Edits tools, and as enticing as that sounds, you probably won't use them much, if at all. (Acrobat also offers what it terms Advanced Editing tools, but they address page formatting issues such as cropping, not writing issues such as commas.)

Instead, for practical reasons, edits to text are almost always made as *comments*, and you can insert most of them using just a couple of Acrobat's Commenting tools—Highlight Text, and Note.

Tip: The easiest way to activate any Acrobat tool is to click it on its toolbar. We recommend you keep, at minimum, the following toolbars open while you work: Basic, Commenting, File, Tasks, and Zoom. To select them, go to View > Toolbars.

The Tools You'll Use (or See) the Most

We'll talk about prime editing options in a minute, but first, time out for *the Hand*. If you're new to PDFs, we know you're asking, "What's the little hand thingy, and how do I make it go away?" (Admit it, you are. We did.)



The Hand Tool

The hand thingy (aka the Hand tool) wandering around your screen is, for some reason, Acrobat's default tool. It does what the scroll bars do—moves your document up, down, left, and right—but in a slightly creepy, disembodied, Cousin It sort of way. When you click the Hand tool, hold down the left mouse button, and move your mouse, the little white fingers clutch the page and pull it. You almost expect the paper to wrinkle. We're all for intuitive interfaces, but this one always makes us flinch a bit. Never mind.

The important part: how to make it go away. If you want Cousin It to scuttle back into his box, you'll have to select another tool. Or you may just have to get used to him.

Tip: Some Acrobat tools, such as the Hand, stay selected until you activate another tool. You can't toggle them off by clicking them a second time, the way you can a Word tool.

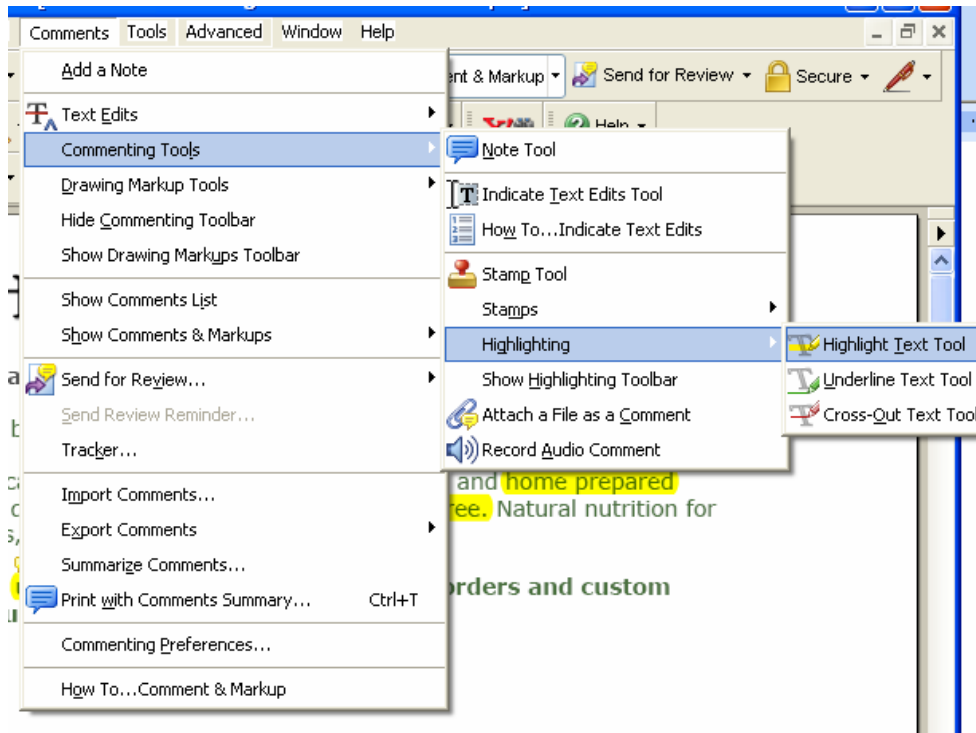
Some tools, such as the Note tool, *don't* automatically stay selected. You must activate them each time you want to use them. For instance, if you're using the Note tool, once you've written and closed your note, the cursor immediately reverts to a Hand. The next time you want to insert a note, even if it's two words later, you must select the Note tool again from the Comments or Tools menus, or click the Note tool icon in the toolbar. If you're inserting lots of notes, that can get a bit old.

Here's help: You can keep any tool turned on until you activate a different one by selecting that tool and going to View > Toolbars > Properties Bar. Then choose Keep Tool Selected. Now, until you select another one, you can use the tool repeatedly with no mouse visits to a menu or toolbar.

The Top-Drawer Editorial Tools

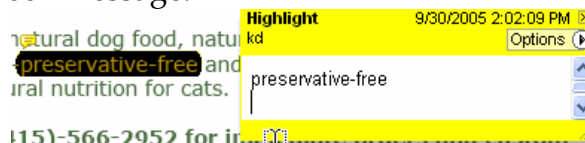
In a PDF, you can efficiently do most of your editing using just two tools—the Highlight Text tool (our hands-down favorite) and the Note tool. The Pencil tool is good for a few things, too. Each of these tools gives you a different way to insert instructions, ask questions, and suggest changes, depending on what's most convenient for you or most appropriate for the work at hand.

Look for them all under Comments or under Tools on the main menu bar. Here's where the Highlight Text and Note tools are in the winding river of options under Comments:



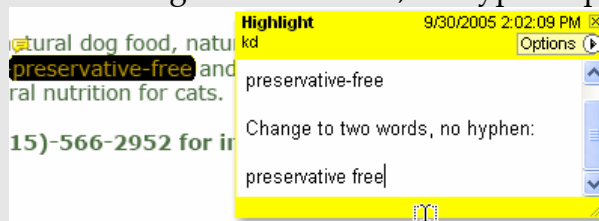
The Highlight Text Tool. We've already declared our devotion to this tool, and soon you'll see why. If you want to master just one PDF editing tool, make it this one. Here's how:

1. Click on the Highlight Text tool in the Commenting toolbar, or go to Comments > Commenting Tools > Highlighting > Highlight Text Tool and select it.
2. Using your cursor, highlight the text your comments will refer to.
3. Click in the highlighted area. An empty pop-up box will appear, ready for your message.



Tip: If you'd like the highlighted text itself to appear in the box, preceding your comments, go to Comments > Commenting Preferences, and under Making Comments, check "Copy selected text into Highlight, Cross-Out, and Underline comment pop-ups."

Using the example above, you would highlight the text in question and then double-click. If you've set your preferences as described above, when the pop-up opens, it will say "preservative-free" (the original text). Below that, you would type in your comment: "Change to two words, no hyphen: preservative free".



4. When you finish entering your comments, close the pop-up box by clicking the X in the corner. The highlighting will remain, along with a very small Note icon right next to it. The text of your note becomes visible when anyone passes a cursor over the highlighting or double-clicks in it.

Tip: Whether your changes appear when a cursor passes over the highlighting or when the Note icon is double-clicked depends on the version of Acrobat you're using. To be safe, suggest to whoever will read your notes that they may need to double-click on the Note icon.

(Huge) Advantages: The Highlight Text tool, unlike the Note tool, lets you add a comment while obscuring little if any text. Also, your note always stays connected to the highlighted text; the same can't be said for the Note tool. And it's nice to be able to show the pertinent word or term in the text box, too.

Disadvantage: With this tool, some people worry that because the highlight is within the text, a note inserted this way might be missed by the reviewer. We think that's unlikely, particularly because each highlight also travels with a little icon.

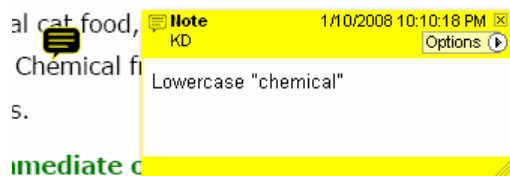
Tip: If you're working on multicolumn text in a version of Acrobat earlier than 7.0, the Highlight Text tool won't let you highlight text in only one column. Instead, it highlights across all columns. In that situation, you'll have to use the Note tool to attach comments.

Tip: The default color for notes and highlights in Acrobat is yellow. If yellow sets your teeth on edge, and you want all your insertions to appear in, say, tranquil turquoise, right-click on a comment that appears in the offending color, choose Properties, and select your favorite color. Then, to make your new choice the default color, right-click on the comment and choose Make Current Properties Default.

If you want to use different colors for different comments, right-click on an individual comment, choose Properties, and select the color of your choice for that comment.

The Note Tool. Think of this as an electronic sticky note. It gives you a place—at any spot in the text—to jot whatever you wish. Compared to the Highlight Text tool, it has a few drawbacks, but it has its virtues, too. To use it:

1. Click on the Note tool in the Commenting toolbar or go to Comments > Commenting Tools > Note Tool and select it.
2. Place your cursor in the file where you'd like your note to appear.
3. Click. A Note icon will appear, along with a semitransparent box where you can type your message—request a change, ask a question, whatever you need to do.



4. When you're done typing your message, close the box by clicking the small X in the corner. The Note icon will remain visible, and your message will appear when someone runs a cursor over it or double-clicks on the icon.

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Advantages: The default is a bright yellow note, so your message is easy to spot. It also gives you a way to insert comments in places where you can't use the Highlight Text tool (like multicolumn text).

Disadvantage: The Note icon itself obscures the text beneath it, so to see all the text, the reviewer may need to drag the icon (and the note along with it) to another spot. At that point, it may be hard to tell what the note refers to.

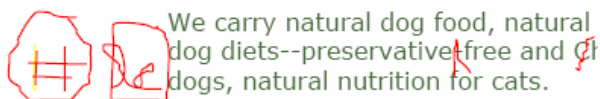
Tip: To edit any comment you've made, open it with a double-click and make your changes. If you want to delete one you've written, click on it once. It will turn black. Then just tap the Delete key on your keyboard...and it's gone. If you've inserted a note but haven't yet typed in any text, you can remove it with the Undo function—Ctrl+Z.

The Pencil Tool. This is a Drawing tool, like the Arrow, Rectangle, Oval, and other Drawing tools. In general, the Drawing tools are used to create PDFs, not edit them, but the Pencil tool is the exception. With it (and enough dexterity) you can make standard editing marks on a PDF file just as you would with a real pencil on a printed page. To use it:

1. Click the Pencil tool in the Drawing toolbar, or go to Tools > Drawing Markups and choose the Pencil tool.

Tip: Sharp-eyed editorial types (like you) might spend way too much time trying to sort out the difference between Drawing and Drawing Markup(s) in various places they appear in the Acrobat menu options. In version 7.0, there's both a Drawing toolbar and a Drawing Markups toolbar, and there are Drawing tools and Drawing Markup (singular) tools. We have no idea what distinction these different labels were meant to, um, draw, but don't worry about it. You can find the Pencil tool under anything that includes "Drawing."

2. Use your mouse to make editorial marks on the PDF page.



3. To “erase” any of these marks, use the Pencil Eraser tool that appears right next to the Pencil tool. It works pretty much like the pink rubber end on a yellow number 2.

Advantages: You can use this tool to draw simple proofreading marks; for example, to note changes for capitalization, inserting periods, deleting spaces and hyphens, and any other uncomplicated, easily recognized edit. Those who are accustomed to seeing standard editorial marks on hard copy might prefer to see them in a PDF file, too.

Disadvantage: You must have an exceptionally steady hand to use this tool; otherwise, the marks can look pretty ragged (as they do in our sample). Also, this can be a time-consuming way to mark changes.

The Typewriter Tool. This is one of the few tools you can use to enter text directly in the PDF. It’s often used to complete forms provided in PDF format, and can also be used for editing. What you enter looks like it came direct from a typewriter. This means it’s a lot neater than notes made with the Pencil tool, but the big disadvantage is that it also can get “missed” when looking for changes in general text.

Tip: Some people like to use different Acrobat tools for different types of edits in a PDF document. For instance, they might use the Pencil tool for marking deletions and insertions, and the Note tool for adding queries. Whether you use only one tool or a combination, be sure to indicate in a cover note to the person who will review your work which tool you’ve used for which type of edits.

But think hard before you get too free with the tools. Using multiples will slow you down, and despite your cover note, the reviewer could be confused about why you’ve used which tool when. Also, if you view and/or print your comments (see “Show Comments List” and “Print with Comments Summary,” below), you’ll see/print a list of *every* last insertion, deletion, note, highlight, what have you. Tedious to decipher, and a sad sacrifice of trees.

A Few Comments About Comments

Whether you spotlight words in comments with quotation marks, with italics, or by setting them on separate lines, pick just one method and stick to it.

In third bulleted item, change “The” to “the.”

In third bullet item change *The* to *the*.



In third bullet item change
The
to
the

The goal of any comment is to make a suggested change perfectly clear, and using a single style in all your comments will help the reviewer understand them quickly and easily. Check with the person who will make the actual changes to find out what comment style they'd prefer to see.

Viewing Comments

Acrobat lets you sprinkle comments here, there, and everywhere in a document, and when that's done, it lets you line them all up for viewing—order from chaos. To experience it, go to Show Comments List.

Show Comments List. This feature will let you easily scroll through all the comments (yours and anybody else's) in a PDF. When you select this feature, the screen will split horizontally, and the comments will appear in the lower pane. You'll see the type of comment (a Note, for example) and who inserted it. Clicking on the text of a comment shown there will take you to the place in the document where that comment was inserted. You can also edit the text of any comment in this listing, and the revised version will appear in the document as well.

Tip: You can see the same display of comments (and work with them the same way) by clicking the Comments tab that appears on the left edge of the page.

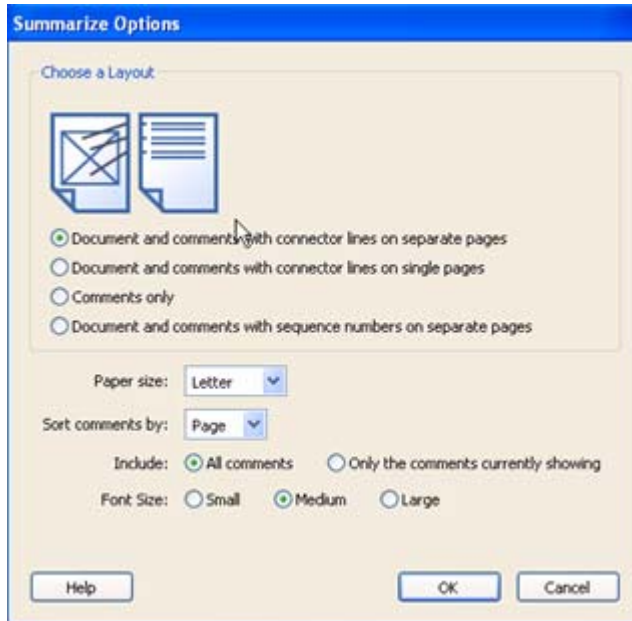
Printing

As you've already seen, when editing a PDF file, sometimes it's easier to work with hard copy. The same applies to the comments you've inserted. Luckily, Acrobat lets you print both file and comments, and gives you a whole range of options to let you fine-tune the results.

To print your existing file and comments, go to Print Comments with Summary. For more freedom to pick and choose what you print, head for Summarize Comments.



Print with Comments Summary. To select this feature, go to Comments > Print with Comments Summary. When you do, you'll see the Summarize Options dialog box, where you have all kinds of choices.



The first thing to do here, under Choose a Layout, is to decide how you'd like your comments to appear—for example, on the same page as the text or on a separate page.

Tip: If you want to view only certain types of comments or make other changes to the way your comments show onscreen, you can go to Comments and select Show Comments & Markups. For example, you can choose to show only comments made with the Note tool or only those created by a certain reviewer, or to hide all comments. Be aware, though, that even if certain comments are “hidden,” all comments in the file will print.

In this dialog box, you can also make choices on the paper size for printing and how you'd like your comments sorted (by Author, Page, Date, or Type), as well as the type size of the Comments (Small, Medium, or Large). Be aware, though, that “Small” can be “tiny,” and you may need a magnifying glass to read comments this size.

Be aware, too, that changing the font size can wreak all kinds of havoc, especially when there are several comments on one PDF page (things that fit on one page can now drool onto two, formatting can go haywire, page counts can change—ugly stuff). You may want to leave those font size buttons alone.

Tip: If you've chosen to place your comments on separate pages, have no fear; the type size of the text in your PDF file won't change. However, if you place the comments and the text on a *single* page and you have several comments on one page of text, your document text may shrink to allow all the comments about it to fit on that page.

Once you've made your choices in the Summarize Options dialog box, click OK and you'll be sent directly to the Print dialog box. As in Word's Print dialog box, you can choose to print all the pages in your PDF or only certain pages.

Summarize Comments. This flexible feature offers you some extremely handy options you don't find in Print with Comments Summary. To select it, go to Comments > Summarize Comments. When you do, you'll see an old friend—the Summarize Options dialog box, with all the same options discussed above. It's only after you've made your choices and clicked OK that you'll see how this feature differs from the previous one.

In Print with Comments Summary, after clicking OK, you're taken directly to the Print dialog box, to print your existing file. In Summarize Comments, after clicking OK, Acrobat creates a *new* file for you to continue to work in, print, or do with what you will.

Tip: If you're planning to print your file with its comments, Summarize Comments can be used much like Print Preview in Word. The new file it creates lets you see how your pages and comments will look.

Once the new file is created, the comments become part of the body of the document. That means you can't edit them directly as you could in the original document, because they're no longer comments, really, just more text. But you *can* use any of the Acrobat tools to add new comments (comments on the comments) in this new PDF. For example, you might want to add your own note accepting—or rejecting—a change suggested by someone else. And if you want to print only some

of the pages in your document, or even smaller selections (both discussed below), it's often helpful to create a new file that contains just those things.

Creating a File with Selected Pages. To do this, you'll need to "extract" the chosen material.

To pull specific pages from the rest of a PDF file, open the file, go to the Document menu, and select Extract Pages. The dialog box that appears will let you choose the pages—or range of pages—you want to extract. These pages will be placed in a new document. Give it a new file name and save it. Then you can print or send it, as appropriate.

Capturing Certain Selections or Elements. To pull just certain selections or elements—less than a page—from a PDF, go to Tools > Basic > Snapshot Tool or click on the camera icon in the Basic toolbar. You'll get a crosshairs symbol. Holding down your left mouse button, place the crosshairs at one corner of the text or other item you want to capture, and move the cursor diagonally to enclose it. When you release the mouse button, a copy of your "snapshot" will be placed on the Clipboard, and from there you can paste it into a new document, for printing or for adding more extensive comments, if you wish.

Be aware that the snapshot is an image, just a picture of what appears onscreen at the spot you've selected, so when you paste it into another document, any Comments icons (such as Note) will come along if you've included them in the crosshairs, but only the icon image itself. The text typed in the associated pop-up box is not copied. Sorry.

Some Second-Drawer Tools

In addition to Highlight Text, Note, Pencil, and the printing options, Acrobat contains some other tools you might find handy now and then. All these tools can be found under either Comments or Tools on the main menu bar:

Attach a File as a Comment

With this tool, you can attach an entire file (such as a Word file) as a comment. You can navigate to the file of your choice, select it, and then choose an icon (such as a paper clip) to indicate that file on your PDF page. A small yellow icon also appears.



Attaching a file as a comment can be useful if you want to reference a particular report, a style guide, or some other primary source. It can also be a bit cumbersome, so you'll probably want to choose other options when possible.

Send for Review

As a rule, when you've finished your edits to a PDF file, you'll send it back to whoever has asked for the work. Most often, you will simply attach the edited file to an email message. But if you'd like other options, Acrobat has two built-in ways to return files:

Send by Email for Review. Selecting this option brings up a dialog box that allows you to invite others to review and add comments to the file. Acrobat guides you through the process, and automatically includes a default email message asking for a review, along with instructions to the recipient(s) for adding their own comments. You can edit this message however you like.

When you're done tinkering, Acrobat automatically sends the message to your default email program. If you have your email program set to automatically Send/Receive, your email will be sent immediately. Otherwise, the email will be put in your Drafts folder, where it will wait until you're ready to send it. Once it's sent, a copy is stored in your Sent Items folder (if you have chosen this preference), just like any other outgoing email.

Upload for Browser-Based Review. Select this option if you want to upload the file to a location where all reviewers can access the file, such as a web site or file transfer protocol (FTP) site. Acrobat will walk you through the steps.

Import Comments and Export Comments

These are the kind of gadgets that might gather dust in the back of the toolbox, but when you need them, you're glad they're there.

Say you're reviewing three very similar documents, such as three different fee schedules for a bank. The only intentional differences between them are the contact phone numbers that appear on them. And let's say you find a misspelling in the first one you review. Because the second two are copies of the first one, with only the phone numbers changed, you know that typo will appear in all three documents.



Using these tools, you can insert your change request in the first schedule, then export your comment *to* the other two, or go to the other two and import the change *from* the first one. That way, your comment will appear in exactly the same way and in exactly the same place in all three documents, and you only had to type it once.

Warning: When using this tool, be very sure that your documents really are exact duplicates. Otherwise, convenience becomes chaos as your comments land in blank places or, worse, *wrong* places. Even if you're sure you're dealing with clones, review the comments in all the files when you're done, just to be sure nothing's gone awry.

Tip: For more information on any of the Acrobat Commenting tools, look to Comments > How To...Comment & Markup. Unlike the dubious assistance you get from Help features in some applications, this item is really useful. We highly recommend it.

Beyond Comments and Tools

In addition to Comments and Tools, Acrobat offers seven other menus. Several of them will look familiar to users of Word—or any other Microsoft application, for that matter. And for good reason: they contain many of the same options, which work very much the same as the Microsoft versions.

Consequently, we won't dwell on menus or options that contain nothing new or that aren't especially useful to editors. Instead, we'll shine the light on a few Acrobat menus that contain things that are.

Edit

In Acrobat, this menu is quite similar to the one in Word, but a few things do bear noting:

Check Spelling. This does exactly what every other spell-checker on the planet does, only less. It hints at *far* more than it delivers. Be aware that it does *not* check the spelling in the vast majority of a PDF file; all it checks are the comments you've inserted. That's it. If you're reading this, Adobe, know that editors and proofreaders everywhere are waiting for you to retool this tool to spell-check *all* the text in a PDF document, not just a few comments.

Find. This tool is a bit better than Check Spelling. While it doesn't offer the nuanced options the Word version does, it *will* let you search an entire PDF document (not just the comments) for a word or term.

Search. This is actually closer to the version of Find that appears in Word, and to the Search (or Find) feature under your computer's Start menu. With it, you can search for items in multiple PDF files, not just a single file. That's a big plus. Of course, because you can't directly alter the content of a PDF, there is no Replace feature.

Completing Your Work

When you've finished editing the file, whether on hard copy or onscreen, go back and read it (and your comments) again. As we keep saying, when reviewing any piece of writing, it's hard to look for everything at once. That can be especially true when viewing a PDF file.

Once you've done your final passes, write a cover note, listing any issues or information that pertain to the whole project—such as unresolved questions, the Acrobat tools you've used, how to view your comments, which pages you'll be faxing, if you're not sending them all—and return it with the pages or files to whoever has asked you to review them. That way, the next person to work on the project will know its exact status and be able to move it right along.

Tip: PDF files are often much larger than Word files, sometimes because of what they have in them, but partially because of the “behind the scenes” formatting of a PDF. Some email programs limit the size of attachments, and a ponderous PDF can make them choke.

To slim down your PDF file before returning it to the sender, don't just save it; use the Save As option under File and answer yes when asked if you want to replace the existing file. This optimizes the file and reduces its size. If your file is still too big to tack onto an email message, you might want to consider compressing it (with WinZip, ZipIt, etc.).

Editing PDFs—A Quick Reference

There's a lot to know about PDF editing. Here's a quick-reference roundup of the highlights.

- The Acrobat tool most useful to editors is Highlight Text. The Note tool can also be handy.
- The Pencil tool, and other tools such as Insert Text At Cursor and Cross Out Text for Deletion, let you make marks similar to standard editing marks on hard copy, but they're difficult and time consuming to use.
- Acrobat tools don't toggle on and off as Word tools do. Instead, most tools remain selected until you select another one. If a tool *doesn't* stay selected and you want it to, you can keep it on by choosing Keep Tool Selected under View > Toolbars > Properties Bar.
- Use Show Comments List for an easy review of all your comments (and those of others) in a file.
- Use Print with Comments Summary to print comments only, or the current file *and* comments, in different layouts of your choice.
- Use Summarize Comments to create a new file that incorporates your comments as part of it (for further work) and shows you how your chosen print options will look. Use it, too, if you want to print only certain portions or elements of your file. You can also print from Summarize Comments once you've made your adjustments.
- Acrobat's Find feature is not as comprehensive as the Find feature in Word. The Search feature is more helpful.
- When returning your edited file, if you've used multiple tools, include in your cover note which tools you've used for what different purposes.
- When emailing your edited PDF file, click on Save As and answer yes to the prompt "Replace existing file?" This optimizes the file and reduces its size.

*If you liked this job aid, but would like a slightly condensed version full of pointers on the basics and nice-to-know extras, see **Tips for Editing PDF Documents—Basic**, and for quick help, see **Tips for Editing PDF Documents—Quick Help**. For even more help in the world of words, see our entire set of easy-to-use [Job Aids for Effective Communication](#) that give you quick, clear guidance as you prepare anything from a memo to a manual to a web page.*

