


Correcting Proofs via PDF Commenting

The “paperless office” may not be completely realized, but marking up proofs electronically is quite feasible, and more useful than ever: Adobe designed the Commenting tools in their free Acrobat Reader to mark corrections on a PDF with the precision professionals require.

The first rule is to keep everything as simple as possible. Years ago, Adobe Reader was enhanced with the Commenting Tools originally available only in the [not free] Standard and Professional versions of Acrobat.¹ You do not need an Adobe account to use Adobe Reader, or to sign in if you already have one. Nor do you need the formal review that Adobe offers those seeking a more structured process.² An editor can send out a PDF proof for a book or article as a regular e-mail attachment (large files may need a service like WeTransfer), and the recipient can use Adobe Reader to add “Comments” marking corrections, explanations, or suggestions *without affecting the actual pages*. Of course re-working on a larger scale generally should occur before the proof stage.

The second rule is to stick with Adobe’s professional-grade software for processing PDFs. Adobe invented the format in the early 1990s, and kept it proprietary for years before releasing it in 2008 as an open standard (“ISO 32000-1:2008”). Liberation led to an increase in the number of programs for creating or modifying PDFs, but most are of the point-and-shoot variety, and ignore or gloss

1. The Pro version could turn them on for Reader by “enabling Reader commenting” for individual PDFs, creating a “Reader Extended PDF.” However, with Reader DC [“Document Cloud”] the commenting tools work on PDFs with no security features set (*contra* Adobe’s documentation [“Last Published: March 24, 2020”]). Among other things, “enabling” invokes the security setting to disallow Changing the Document. Obviously, modifying the text would be a *faux pas* for proofs, and a serious problem for collecting comments from multiple reviewers. Reader DC indicates when a PDF has had extensions enabled with a special icon  in the Navigation Pane (down the left side of the work area; a padlock icon shows when more stringent security features have been applied).

2. In fact, Acrobat’s “Send for Comments” can reduce the available tools.

over details professionals need, causing problems for images, text, metadata, and more.³ Meanwhile, professional-grade PDF software assumes serious understanding of PDF's internal structure—something of a black art.

Note that Adobe itself offers PDF applications that do not fully implement PDF features, including Android and iOS versions of Adobe Acrobat Reader. I occasionally annotate PDFs on an Android tablet, but I keep those PDFs separate, moving selected comments to the master PDF via export and import. I am also wary of Adobe's browser add-ins for desktops and laptops: I doubt they save time, and I like to be asked where I want my PDF downloads to go. (And I *really* like a 24-inch screen for proof-reading.)

The rules Simple and Adobe conflict when applications install their own PDF viewers, with browsers a frequent culprit. These may work quite well for casual web-surfing, but often need disabling for serious work. Firefox offers directions here; for Chrome look here.⁴ Microsoft advises Edge users wishing to specify their PDF viewer to right-click on PDF links and choose "Save as," noting that Windows can make Acrobat or Reader the default viewer.

Applications commonly urge you to sign in, or click on buttons that lead to other services that require signing in or purchasing new products or added features. Acrobat Reader DC does likewise, especially in the tool buttons down the right side of the Reader window. This puts them pixels away from the Options icon for individual items in the Comments List, turning distractions into accidents waiting to happen. In particular, avoid Edit PDF: the whole point of

3. One of my pet peeves is software that changes Acrobat/Reader's page numbering from what Adobe terms "logical" to "unencumbered by the thought process": good PDF software is perfectly capable of numbering an article's pages 281–320, so if you need to go to p. 299 you type that number in the Go to Page box (keyboard shortcut CTRL-n [Mac ⌘-n]), without having to calculate 299 less 280. Acrobat Pro can fix this. Some sources add their own "title page" at the front, numbered 1, with the article's actual first page becoming 2; I often re-number the title page "A" so it is out of the way when I apply the actual number to the real opening page.

4. Comments there suggest that updating Chrome re-asserts the default preference, though that may no longer be the case. Note that Adobe Reader and Acrobat both report the fact when users stray off the reservation: the Description tab of the Document Properties (keyboard shortcut CTRL-d [Mac ⌘-d]) names both the application that last saved the PDF and the PDF producer.

proofs is that they are to be marked up with *instructions for somebody else to make corrections in the master file*.

The Commenting button is a “speech balloon,” fourth from the top on the right side. Click on it and Reader opens both the Comment Toolbar along the top of the work area, and the Comments List pane down the right side. The Toolbar’s first button is another speech balloon, this time referring to the simplest kind of comment, a Sticky Note. Click on the tool to select it and the cursor takes the same shape. Click wherever you like on the page to place your note there, and this will open up a new comment in the Comments List, with the cursor ready for typing. When you are done, click on “Post.” At that point you can drag the icon around on the page to re-position it—an indication that it “floats” above the page instead of being attached to anything beneath. This independence makes Sticky Notes suitable mainly for larger items: “This image is too dark,” or “Shouldn’t the numbers in this table line up?” When you have finished making notes, you save the PDF (presumably a copy to keep the original pristine), and it is ready to send on its way.

Sticky Notes can also show their content in Pop-up windows, whose behavior is subject to several “Commenting preferences”; these are worth adjusting—use that name to find the section in Adobe’s documentation. The settings themselves are available via the Options button at the top of the Comments List, or by the more usual File → Preferences → Commenting. I like “Hide comment pop-ups when Comments List is open” to reduce clutter; if I add a Sticky Note while the Comments List is closed, a Pop-up appears for typing my comment. “Automatically open pop-ups on mouse rollover” is handy because the Pop-up closes itself when you roll away. Note that you may need to re-open a PDF for a preference change to take effect, and a few indicate they require re-starting the program.

In making corrections via PDF, the goal remains the same as in the traditional paper process: to show each change precisely and unambiguously so that anyone dealing with the corrections can see immediately what you intend. Bear in mind that you will likely need to proof the corrections, probably months in the future: everyone benefits from clear mark-up.

Finally, if the pages being corrected will end up on paper, it would be prudent to check a printout of the PDF before the job goes

to press. There are advantages to proofing on screen—I swear on-screen enlargement helps me find some kinds of typos—but other errors (e.g., type size) are easier to spot on paper. When making your printout, you should check whether Acrobat or Reader is printing at final size: some Acrobat/Reader installations default to a printer setting that re-sizes the PDF page to fit the printer’s standard sheet—sometimes handy, sometimes misleading.⁵

PDF Commenting 101: Introduction

“PDF” stands for “Portable Document Format” and was originally intended as an electronic equivalent of a paper printout.⁶ Like paper, a PDF is supposed to be stable, looking the same on any device or printout. Adobe, the powerhouse graphics-software company, developed the format from Postscript, its revolutionary “page description language,” releasing Acrobat in 1993. With the fourth iteration (PDF format 1.3, 2001) PDF established the reliability required for the publishing industry, as well as legal documents, and even tax forms. The eighth iteration (PDF format 1.7, 2008) is associated with the public release of the specification and the move to an open, ISO-standard format. The combination of standardization and increasing complexity slowed innovation, and the next ISO version (PDF format 2.0) was not released until 2017. That is being revised, and Adobe’s

5. Another setting that can cause problems is that to “use local fonts,” i.e., show text exclusively with fonts actually installed on the viewing device, substituting as necessary and *ignoring any other font embedded in the PDF*. This can undo careful typesetting and hide unusual characters.

6. See “The history of PDF,” <https://www.prepressure.com/pdf/basics/history>. PDFs are frequently generated by “printing” to a special printer driver: Mac OSX uses this method, and Windows 10 comes with another “Microsoft Print to PDF,” and many more are available as add-ons. Along with readers built into browsers, these constitute the other major avenue for creating or saving PDFs without Adobe’s imprimatur. For example, OSX’s Preview can add comments, but saving them can do serious damage: I recall a book where doing so re-encoded the fl and fi ligatures—the pages looked the same, but words containing either pair (e.g., “official,” “reflect”) were no longer searchable. Full versions of Acrobat also install the “Adobe PDF” printer, as handy as the others but much more configurable. However, other Adobe products (Photoshop, Illustrator, InDesign) can export directly to PDF with advanced features unavailable through ‘printing’.

PDF guru, Dov Isaacs, predicted full PDF 2.0 support will not become mainstream until the second half of 2020.

At first blush, the PDF format's emphasis on stability would seem to conflict with the notion of correcting the text it contains. However, the analogy with paper holds here as well. When you use PDF commenting to mark corrections, you are not changing the text in the PDF. Rather, you are marking corrections for someone else to make in the master file(s): you will not see the actual corrections in place until a new PDF has been generated from the master. As noted earlier, the process of "enabling" Reader Commenting for a PDF invokes security features to prevent modification of the underlying document; after all, anyone gathering corrections via PDF commenting needs to be sure they refer to precisely the same text.⁷

Keeping comments separate from a PDF's content may be necessary, but it carries a major drawback: it is awkward to print out a marked-up PDF showing the comments in context on the page. By default, Acrobat/Reader's regular print function ignores comments. Reader DC offers a tutorial on printing comments that involves checking some application Preferences and then moving individual comment Pop-ups so they fit on the page without obscuring anything vital. This becomes impractical with more than a few comments or pages, and those needing to print many comments should explore the print dialog's options under Comments and Forms (illustrated in the tutorial just mentioned).

Before getting fancier, it is worth noticing other details for individual comments. The upper left corner of the note's window shows an icon for the comment's type, along with Acrobat/Reader's name for the author of the comment. In Reader DC, comments of the type Sticky Note get just the icon and the time-stamp in the first line; other types get the brief labels shown in the Comment Toolbar when you right-click on the bar and have it Show All Labels.⁸

One benefit of the time stamp is that should you have second thoughts after you've returned your corrections and you decide to

7. Full versions of Acrobat, and some specialized plug-ins thereto, permit directly editing the text in a PDF, but this task is not to be undertaken lightly.

8. The labels are more concise than the buttons' tool-tip hints. The choice to include the icon and comment type in the Comment List is a setting under Preference → Commenting.

send a later version the recipient can sort comments (the $\frac{A}{2}$ symbol at the top of the Comments List pane) to find recent additions.⁹ Next to $\frac{A}{2}$ is the funnel icon \blacktriangledown for filtering comments in various ways; you can choose to hide them all—but it is all too easy to forget one has blocked comments from displaying.

By default, Reader takes the Author’s name for comments from the system log-in—no surprise there, but it is worth checking how the software knows you: letting Acrobat refer to you as “Administrator” or some unintelligible computerese looks amateurish; it is often helpful to choose a concise name, such as initials. You can change this for any single comment via its Options, the ellipsis symbol in the note’s upper right corner. Select Properties under the General tab to edit the Author field. You can select Make Properties Default to fix the new name as the choice for all future notes.¹⁰ This will not affect existing comments, however, so these may require re-naming—one by one unless you are adventurous enough to export the comments to a “data file” (*.fdf), adjust them there, and then re-import the data (see Surgery under Advanced Topics below).

I have referred repeatedly to the complexity of the PDF format. The very large number of internal elements makes it prudent to save frequently, especially as comments increase: even on fast hardware the software needs time to [re-]sort things out. As with other programs, occasionally “Saving As” to a new filename not only keeps a back-up but also gives the software a chance to re-compose itself. Shutting down quickly risks losing work.

PDF Commenting 201: Intermediate

The Sticky Note type of comment is only one among several that Acrobat offers. While the Note Tool’s simplicity will serve for “quicky” corrections, the locations are imprecise: no matter how carefully you place the balloon’s “mouthpiece”—you can drag the balloon around with the mouse—chances are it will not appear in exactly the same


9. Or you can sort them, Shift-click in the Comments List to select those you want, export those to a “data file” [*.fdf], and let the recipient import that *.fdf (see the section on Advanced Topics below).

10. Setting the Reader DC preference Commenting → Making Comments → Always use Log-in Name for Author name will prevent customizing the name.

place on someone else's screen. The balloon icons are located with reference to the dimensions of the PDF page, and when you change either the viewing magnification or the screen resolution, the positioning is re-calculated. The difference can be more than a line of text, an obvious violation of the "clear and unambiguous" principle. Happily, other kinds of PDF Comments can be tied directly to the actual text of the PDF. For me, the Big Three tools for marking corrections are Strikethrough, Replace Text, and Insert Text (see p. 10).

Reader DC's Comments Toolbar shows the Sticky Note left-most, followed by buttons for five more tools that link Comments either to text passages or to a point between characters in a line: Highlight and Underline, followed by the Big Three.



Note that the 'Text' in the names of the next two, Text and Text Box, refers to the content of the Comment, not the PDF (in earlier incarnations, Text was called the Typewriter tool). These notes float over the page, like a Sticky Note, except that Text notes get no Pop-up. The Text tool is useful for annotating a receipt, say, or for recording the URL and date of a downloaded PDF. I treat them as an addition to the underlying document, and often "flatten" them to become part of the PDF.¹¹ Text Box is Text with a box around: it does not need a Pop-up to stand out, and can serve for marking up proofs. A fancier variant of Text Box can be found among the Drawing tools, Text Callout. This is a text box with an arrow connecting to the spot on the page where you click the tool, and can be useful for adding text between lines, as when inserting new entries in lists, or an index; its Properties offer colorful options.

Although the Text, Text Box, and Callout Text notes do not get Pop-ups, all three types appear in the Comments List. All three can be edited by double-clicking on the text, either on the page or in the Comments List entry. On the page they can be examined with the "Loupe" tool (, spot magnifier).¹² Comments List entries offer two more features discussed below, Replies and the Checkmark box.


11. Flattening is not available for Reader, and requires Acrobat or Acrobat Pro, neither free; for details see Adobe's Acrobat user forum thread here.


12. Right-clicking on Acrobat DC's main toolbar lets you select Show Select & Zoom Tools to keep there for convenient access; I keep Loupe handy for its many uses, including clarifying closely-spaced comments. (Note that the icon for Acrobat Pro's Ink Manager looks similar.)

Highlight and Underline draw the eye with color: the defaults make highlights yellow and underlining green). But when correcting proofs the usual reason for marking text is so it can be edited: the Strikethrough tool or Replace Text is often more appropriate. Highlighting seems better suited for editorial suggestions, e.g., “active voice might work better here” or “can we reduce the length of this footnote?” I like to reserve Underlining for the specific case of toggling italics on or off, by analogy with traditional mark-up: italics are easily lost when files are converted between systems and frequently need adjustment; dedicating the Underlining tool removes the need to verbalize the change in the text of the comment.

You do not need the buttons in the Comments Toolbar to access the Big Three tools. Instead, you can use the regular select tool () which morphs into an “I-beam cursor” () for precise text selection. You can also double-click to select a word, or extend a text selection in any direction by holding down Shift while hitting an arrow key.¹³ Right-clicking in your selection will open a floating menu, where, unsurprisingly, the first choice is Copy; the next four are commenting types, including both Strikethrough and Replace Text.

When you right-click with the cursor between characters in a line of text (i.e., selecting nothing) the context menu offers Insert Text at Cursor—the third of the Big Three—among ten other options. If you want the addition to fall on a particular side of a punctuation mark or space, that is where you should click; again, the arrow keys can help position the cursor precisely.

A major advantage of using the regular selection tool’s () Pop-ups to choose between the Big Three is that once the comment is complete you return to the regular tool: the worst a stray click can do is change the cursor’s location. In contrast, a stray click with the cursors dedicated to any of the Big Three tools creates a comment that will demand attention even if empty.

You can also use the regular selection tool () while the Comments Toolbar is closed. However, selecting text in this state produces a tool-tip bank of icons that includes accidents waiting to happen. Right-clicking the selection kills the tool-tip, replacing it with the

13. Users have reported problems selecting quotation marks for deletion. This is said to be common though I do not recall seeing it (perhaps because my fingers are accustomed to Shift-Arrow).

context menu just described: I like to leave the Comments Toolbar open.

As for the “ten other options” in the context menu when nothing is selected, these link to some of Reader’s general features, such as Rotate, Find, Previous View, etc., most of them useful in their own way. Right-click in a blank area to get the same menu without Insert Comment. I avoid right-clicking on artwork with Reader DC as the results seem unpredictable; sometimes I can mark up text in a vector image, but on the whole I’d rather use Sticky Notes to comment on artwork.

Obviously, the Replace Text tool was designed to reduce the number of comments, in effect combining a deletion and an insertion into one operation. In the spirit of keeping things simple, consider using Replace Text to combine changes when several occur within a few lines or for re-arranging clauses. Select the passage, copy it, mark it as replacement text, and then paste it into the replacement-text box; once there, re-edit by typing or additional cut-and-paste. Often a cluster of changes can be conveyed much more clearly by combining them into one coherent passage.

Not that the comments are easy to read in the Comments List. For one thing, the Loupe tool does not work on comments: for text on the page it is very helpful for enlarging details about a comment’s point of attachment, but not the text in the Comments List. Meanwhile, the default font for Comments is usually a 10-pt sanserif—*Segoe UI* in the case of my recent Win10 installation of Reader DC. Reader’s Preferences allow adjusting both the typeface and the type-size for future notes, but those already in existence are pretty much stuck with their original attributes (but see Surgery below). Sanserif fonts tend to be clearer than serifs at small sizes, especially at typical screen resolution, making them a good choice for comments. One exception is italics, often “obliqued” in sanserifs: slanted type tends to be less clear than designed italics. Nowadays, you can select text in a note in the Comments List, and toggle italics on or off with `CTRL-i` [Mac `⌘-i`]; but old fogey that I am, I like the old, no-formatting workaround of using underscore symbols (`_`) to mark the beginning and end of text that should get italics.

Periods and commas in Comments are also hard to distinguish, another violation of “clear and unambiguous.” When dealing with



Examples of Acrobat/Reader Tools for Marking Corrections on PDF Proofs

The Big Three tools for marking corrections are ~~Strikethrough~~, ~~Replace Text~~, and ~~Insert Text~~, because all three are tied to the text in the PDF. The small blue triangle indicating Insert Text can be hard to see on the page when its Pop-up is closed, and the red and blue bars for delete and replace respectively are also less than obvious when applied to a single letter, punctuation mark, or word-space. The icons for Sticky Notes are easier to see, but these float above the page, unconnected to anything else on it, and can be re-positioned at will.



Two more mark-ups tied to the text are **Highlight** and Underline. Both can be quite useful in their way, but for marking up text corrections are less direct than instructions to delete, replace, or augment text. Like the Big Three, these tools have Pop-ups that can, depending on Reader DC's preferences for commenting, automatically open and close when you mouse over them on the page so long as the Comments List is closed.

Father along in the Commenting toolbar, the Text tool is a means to put new text on the PDF page. The Text Box tool does the same, but with a colored box around it. The Callout Text tool is like Text Box, except that an arrow goes from the box to the point on the page where you click. All three are like Sticky Notes in that they float above the page: the arrow for Callout Text tries to keep its position, although by careful clicking you can change where it points.

The quantity of mercury is not strange



~~The quantity of mercury is not strange?~~

It droppeth as the gentle rain from heaven
Upon the place beneath. It is twice blest:
'Tis mightiest in the mightiest; it becomes
The thronèd monarch better than his crown.

[Add new line]
It blesseth him that gives
and him that takes.

add line nos.
1st line and
every fifth
thereafter

whole sentences, context or capitalization may clarify matters, but when you want to Insert or Replace a single comma or period, it would be a kindness to those who must read your corrections to add the name in brackets in the Comment List (e.g., “[period]”; or more modern, “.<dot>”). Similarly, a bare semi-colon can be hard to distinguish from the full form. (Paper mark-up prevents confusion by drawing a circle around periods and marking commas with a “roof” or circumflex above; full colons get a roof above and a caron [haček] below.) With nothing to show where the baseline falls, a bare single quote is indistinguishable from a comma. But the hardest character to see is a single word-space; traditional mark-up uses #, now become the hashtag symbol; when inserting a bare single space I suggest adding “<sp>” as explanation.

Another reason for maximizing use of the Big Three comment types—Strikethrough, Replace Text, and Insert Text—is that under special circumstances these can be imported directly from the PDF into Adobe’s popular page-layout program, InDesign. Until recently, this required a special InDesign “plug-in,”¹⁴ although beginning in 2019 InDesign itself began to incorporate similar capability. Adobe’s implementation is still evolving, and early reviewers worried that those marking up proofs might not do so with the precision necessary for accurate import into InDesign.¹⁵ And there are further complications. Still, the thrust is that the Big Three types of corrections—and only those three types of mark-up—can alter text in InDesign master files. Decades ago, “desktop publishing” launched the trend of pushing production responsibilities back up the chain from the printshop to authors and editors; automating incorporation of PDF mark-up continues this trend.

PDF Commenting 301: Advanced Topics

Replies

Comments can have replies, and certainly there are times when participants need to communicate with each other over specific points. And of course it never hurts to throw in an occasional “Sorry about that” or “Good catch!” Note, however, that replies are not new

14. DTP Tools Annotations.

15. See InDesign Secrets.

notes: they get filed under the original note's author and date stamp, and consequently sort that way. Kilroy's replies will not appear when you sort comments by author: to find them you must enter 'Kilroy' in the Comments List search box.

Mark with Checkmark



With paper corrections one can check off items processed, and PDF commenting offers a similar feature, Checkmarks. These are especially handy for stepping through the Comments List to make sure you have reviewed each: once you have selected a comment there, the keyboard's up and down arrows will move you through the list—the order is mostly intuitive. Some may fret that preserving Checkmarks entails saving the file after applying them, thereby changing the modification date, but this is more than offset by the ability to sort by checkmark status, making it convenient to pick up where you left off or find any you might have missed.

Checkmarks have owners, though this is not always obvious. It used to be that Acrobat and Reader would show you only checkmarks you had made: if you used a different name on your home computer you could not see checkmarks you made at the office. I believe Acrobat can now show who applied a checkmark to any comment, but this appears not to be the case for Reader DC.¹⁶

Efficiency Tricks

I see many empty Replace Text comments. Often they overlap with another comment, making them hard to distinguish on-screen; usually one must consult the Comments List to tell them apart.¹⁷ Conscientious readers will attempt to understand the commentator's intent. I expect most result from stray clicks with Replace Text cursor, but no

16. For both Acrobat and Reader, displaying the box for the checkmark status in the Comments List is a preference that by default may not be enabled. Adobe had moved—some say hid—the checkmark in an attempt to streamline the interface, but added the preference after months of protest on their user forum.

17. The insertion point is usually indicated with a dark blue mark  but when two overlap they can become a ghost symbol with a dark blue outline surrounding pale blue fill ; enlarging the view can make the small marks easier to see, especially by using the Loupe tool. Doubled Strikethrough and Underline comments can only be distinguished by noticing doubled entries in the Comments List.

one should assume a comment is empty as it may contain an invisible word-space.

On the other hand, one expects most Delete Text comments to be empty as ordinary deletions need no more. Occasionally, some explanation or description of the change can be useful, but *Delete Text comments should not be used to add text*. That task is best performed with Replace Text, and you don't want someone else (or yourself months hence, or software) to spend time figuring out that you used the wrong tool and comment type. As ever, the goal is "clear and unambiguous."

Status status

For more complex reviews, a comment can be assigned one of five statuses. The default is "None," initially unmarked in the Comments List. The available values are "Accepted," "Cancelled," "Completed," and "Rejected," each indicated by its own symbol, with the reviewer named in a rollover pop-up. The symbol for None appears when a [named] reviewer resets the default. Filtering can use Status as a criterion, offering only those actually in use. I am sure there are situations where assigning statuses would be worth the effort.

Detaching and Re-attaching Comments

Large file sizes are not the issue they once were, thanks to increasing bandwidth and more powerful computers with ever-larger storage capacity. Moreover, the PDF format includes compression to reduce file sizes, and it is perfectly feasible to fit a press-ready PDF for a 200-page book on an old 1.4 MB floppy disk. On the other hand, a single piece of professional artwork can easily occupy scores of MB, and the PDF for even a brief illustrated article may well exceed common size limits for e-mail attachments. This does not mean you must forego the convenience of e-mail for transmitting PDF comments: these can be detached from the PDF and sent as a special PDF data file, typically much smaller, for the recipient to import into [a copy of] the original. Under the Comments menu, choose Export and then the "file" option; this will produce a new file, "filename.fdf."¹⁸

18. By default, Windows systems hide file "extents," so you may need to make them visible to see the ".fdf".

Common sense suggests consulting the recipient before committing to this process. Some safeguards are built in: as mentioned previously, enabling PDFs for commenting with Adobe Reader prevents modification of the text to help coordinate import of detached comments. For editors, the ability to import comments offers the further advantage of gathering notes from several reviewers into a single PDF, where they can be sorted and filtered in various ways, or checkmarked.

A PDF with many corrections can behave sluggishly, in which case performing a “Save As” to a new PDF, and then exporting all the corrections to a data file (*.fdf); next, delete all the comments from your new copy, saving again, and then re-importing the data file, taking care not to rush any of these operations. With luck, you may end up with a sprightly new PDF.

Surgery

By surgery I mean opening an *.fdf file of comments exported from a PDF, tweaking the attributes with a text editor, and then importing the *.fdf back into the PDF. Window’s Notepad will often serve for editing, but I prefer the free Notepad++, which handles larger files and also offers regular-expression (GREP) search-and-replace. Examining the contents of an *.fdf file shows a great deal of information for each comment, including the comment’s type, time stamp, font and size, color, checked status, etc.—it can be hard to see the data for the trees.

For instance, a few years ago when software and operating systems were adjusting to very high-resolution screens, PDF comments added with a new computer could appear tiny on older systems. One can search for a distinctive bit of text in the *.fdf file to locate an ill-formed comment; in this case one of its attributes was something like “font-size:5.3pt”. So you search-and-replace all instances with “font-size:10.0pt”; to fix all comments smaller than 10 pts, GREP search for “font-size:<any digit><dot><any digit>pt”. Another trick would be to regularize names, perhaps changing all “DG” names to “DWG” or vice versa (bearing in mind that names are applied to replies and checkmarks, as well as to comment’s authors). No black magic, perfectly do-able stuff: try it and see—but experiment on a duplicate.

Traditional Mark-up in 2020

Anyone who has used traditional proof-reader's marks will recognize their efficiency in conveying corrections, a system matured over centuries and used world-wide, albeit with local variations; the conventions are precise, hand mark-up is quick and direct, and colored pencils allow different hands, such as design, to distinguish their contributions without further ado. I started out working from paper, but eventually took to scanning both manuscripts and corrections so I could view them on-screen alongside the master files.¹⁹ Having scanned to PDF, I would have Acrobat OCR the pages—not to capture the text (which generally arrived on disk as well as paper) but to help coordinate between scan and master.

The *Chicago Manual of Style* (17th ed., 2017) still illustrates a basic set of proof-readers' marks, as does the on-line Merriam-Webster dictionary. Drawing the marks with Acrobat/Reader's Drawing Markup tool is awkward at best, but most can be added to a PDF by means of "stamps" widely available on the Internet. I suspect the overhead of using PDF stamps—learning the system, keeping track of dozens of stamps—will turn out to be less efficient than marking on paper and scanning, assuming access to a good sheet-fed scanner. Still, some stamps sets are free, others moderately priced: those interested may want to experiment.

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The PDF format seems firmly entrenched and unlikely to fade away anytime soon. While not the best vessel for preserving text *per se*, its emphasis on reproducing whole pages works well for scholarly material, given the long tradition of citation based on page references. Moreover, the difficulty of modifying PDFs—the need to go back to master files—suits publishing's traditional top-down organization, with control firmly in the hands of editorial staff.

The commenting tools have hardly changed since their introduction with Acrobat 6 (2003), although the interface continues to evolve. I take the tools' stability more as a reflection of their basic

19. Scanning hundreds of pages is never trivial even with a dedicated sheet-fed scanner, and I quickly came to appreciate the value of better-than-copier-grade paper; I have shunned bargain paper ever since. These days I send out far less paper, but people still appreciate the good stock.

nature rather than particular foresight (or neglect) on Adobe's part. Nothing I have seen about PDF 2.0 suggests further development of the commenting tools, and as they currently serve reasonably well for marking corrections I do not anticipate major changes.

In the longer term, I would not be surprised to see PDF eclipsed by a more text-centric format, probably via a "mark-up language" along the lines of HTML and XML (ePub3 is based on HTML5).