Digital Tools for Proofreading

This file will prepare you for working in Microsoft Word and on PDFs. Please read it before you tackle the main course content! It might also be a good idea to revise it before you tackle the assignments in Modules 1 and 2.

1 Working in Microsoft Word

Although it is not really 'proofreading', many proofreaders are now asked to work on documents created in Word using the 'Track Changes' facility to show the amendments they have made. We recommend that you have at least Word 2010 (for PC) or 2011 (for Mac).

Below, we outline the main features that you will be using in this course. However, we cannot go too far into the specifics because there are many different versions of the software. We recommend that if you are not familiar with Word and its functions, you take advantage of Microsoft's online tutorials: these are available for most versions of Word, for both PC and Mac.

Find the tutorial that applies to your own version:

<div align="center">

Word 2016   Word 2013

Word 2010   Word 2016 for Mac

Word 2011 for Mac

</div>

We will particularly focus on the 'Track Changes' function, for which you can find a range of tutorials applicable to the various versions of the software.
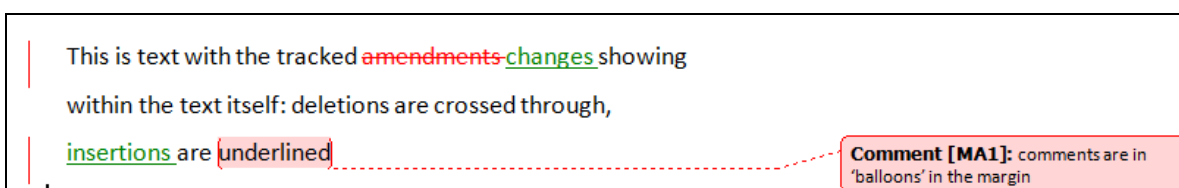
NOTE: never work on the original file that has been sent to you, in case something goes wrong and its contents are corrupted or lost. Always make a copy and work on that.
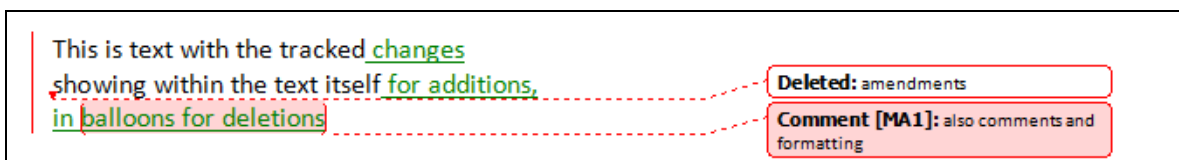
Using 'Track Changes'

The 'Track Changes' function keeps a visible record of the changes you make to a document. Deletions and insertions appear in different colours from the main text (and usually from each other), and the affected lines will have a coloured vertical line in the margin beside them – thus it is easy to see where any changes have been made. You can choose many aspects of how the changes appear on your screen and on a print-out you might make:

- whether changes are visible within the text or in 'balloons' in the margin
- how insertions, deletions and moved text are to be shown (e.g. insertions underlined, deletions crossed out, moved text crossed through in the original location and double-underlined in the new location to which it's been moved)
- which colours to use for the insertion, deletion and movement functions
- whether to use 'balloons' only for comments, with all the changes shown within the text (Example 1 below), or whether to use 'balloons' for changes as well as comments (Example 2).

Example 1: changes showing within the text

This is text with the tracked ~~amendments~~ <u>changes</u> showing within the text itself: deletions are crossed through, <u>insertions</u> are <u>underlined</u>

Comment [MA1]: comments are in 'balloons' in the margin

Example 2: changes other than insertions shown in 'balloons', as well as comments and formatting

This is text with the tracked <u>changes</u> showing within the text itself <u>for additions,</u> <u>in</u> <u>balloons for deletions</u>

Deleted: amendments

Comment [MA1]: also comments and formatting

 'Track Changes' is part of the 'Review' menu, so you can access it using that menu and its options. However, we recommend that you become familiar with switching Track Changes on and off using the keyboard shortcut: Ctrl + Shift + E (i.e. hold down the Control key, then hold down the Shift key with it, then hold down the E key with both the others). Particularly if there are many changes within a document, it becomes cluttered and difficult to follow if you track every single change: so we recommend that 'tidy-up' changes such as removing extra spaces between words, or space at the end of a paragraph, are done without being tracked. Thus only the significant changes will be brought to attention for the author or your supervisor to see and assess. If in doubt, check with your supervisor before you start work.

Viewing different versions

As part of the 'Review' menu you will see a box that lets you choose what you view:

- 'Final': the final version as it will look when all the changes are made
- 'Final: Show Markup': the final version showing all the changes being made
- 'Original: Show Markup': the original version showing the mark-up
- 'Original': the original version in its original state.

It can be useful to work with all the mark-up showing, but then step back and review your work by looking at the final version. This is especially the case if you are changing formatting (layout), as you can then have a clearer idea of what the finished document will look like.

Reviewing your changes

From time to time you will review the changes you're making. If there are many, it's easy to see them at a glance; however, if there are only a few, it's quicker and easier to let Word find them all for you. There will be a facility that allows you to skip from one change to the next at the touch of a button.

When you review your changes, deciding whether to accept or reject them, you can do this individually by right-clicking on each change. This brings up a menu from which you can choose

to accept or reject. When you have reviewed all the changes in the document, rejected some and now wish to accept all the others, you can do this with one click of a button too.

Comments

In addition to your actual changes you will be likely to make comments, as in the examples above: the keyboard shortcut is Ctrl + Alt + M. Type your comment in the box that opens up, then press Esc to return to the main text.

When reviewing your comments, you can move quickly through them by using the navigation buttons provided, just as with changes. You can delete individual comments by right-clicking on them and selecting 'Delete Comment'; if you're ready to delete all the comments in a document, you can use the 'Delete Comments' button. It offers the choices of deleting individual comments or all the comments in the document in one go.

2 Working with PDFs

To read documents delivered to you as PDFs you will need a PDF viewer: most computers will already have Adobe Reader loaded, and this is all you will need for most applications. If you do not have it already, Adobe Reader is available as a free download.

If you are unfamiliar with using Adobe products, there are online forums that can answer your questions and provide tutorials. These are worth exploring.

There are also user videos on YouTube which people have found extremely helpful.

Another PDF viewer held in high regard is PDF-XChange, which works with PCs but not with Macs. Again, this is available as a free download. Help and advice for this software can also be found online. However, many typesetters find that software other than Adobe sometimes tends to work less well with their specialist typesetting equipment, so we will focus on Adobe in this course.

When you open the documents, you will be able to practise the methods of proof correction described below.

NOTE: as with Word documents, never work on the original file that has been sent to you. Always make a copy and work on that. If you wish to practise the procedures described below, why not make a copy of this document and practise on that!

Versions of Adobe Reader

We recommend that you have Adobe Reader XI as a minimum: this is because it was the first version that allowed the annotation tools to be used on any PDF. Before that, PDFs had to be 'enabled' for those tools to be usable. If you have an older version and do not wish to upgrade to the current version (DC), you can still download XI from the Adobe website.
The screen that opens on this link is for downloading DC, but when you select your operating system and the language, the third drop-down menu allows you to select older versions than DC.
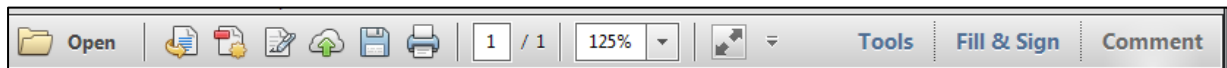
Adobe Reader XI

This is what your screen will look like:
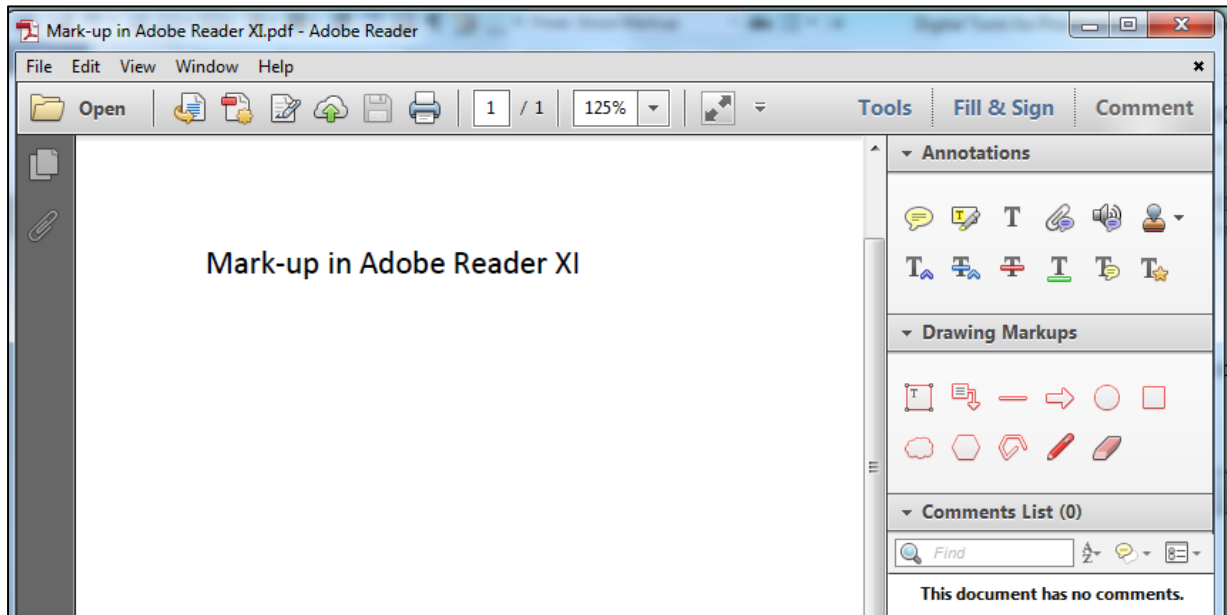
Here is a description of what the toolbars and mark-up boxes contain.

Top toolbar, from left to right:

- Open an existing file
- Convert PDF files to Word or Excel online
- Convert files to PDF online
- Sign, add text or send a document for signature
- Save files to Acrobat.com
- Save file (Ctrl + S)
- Print file (Ctrl + P)
- Page count
- Zoom in/out (text size shown as a percentage)
- View file in Read Mode

Annotations box, from left to right:
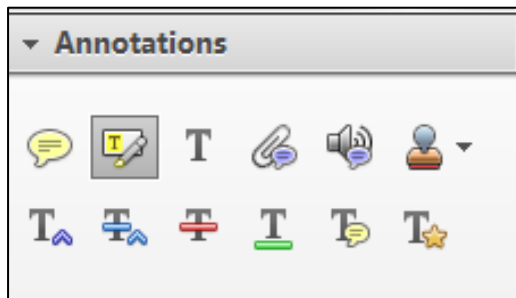
Top row:
- Add sticky note
- Highlight text and add comment
- Add text comment (this allows you to type in the margin, like a typewriter)
- Attach a file
- Record audio
- Add stamp

Second row:
- Insert text at cursor
- Add note to replace text
- Strikethrough
- Underline
- Add note to text
- Text correction markup

Note: sticky notes have a tendency to move around the page, and so they could end up in the wrong place; most people find it better to use 'Add note to text' instead, as the note will stay connected to the text to which it refers.

'Text correction markup' brings up the following helpful dialogue box:
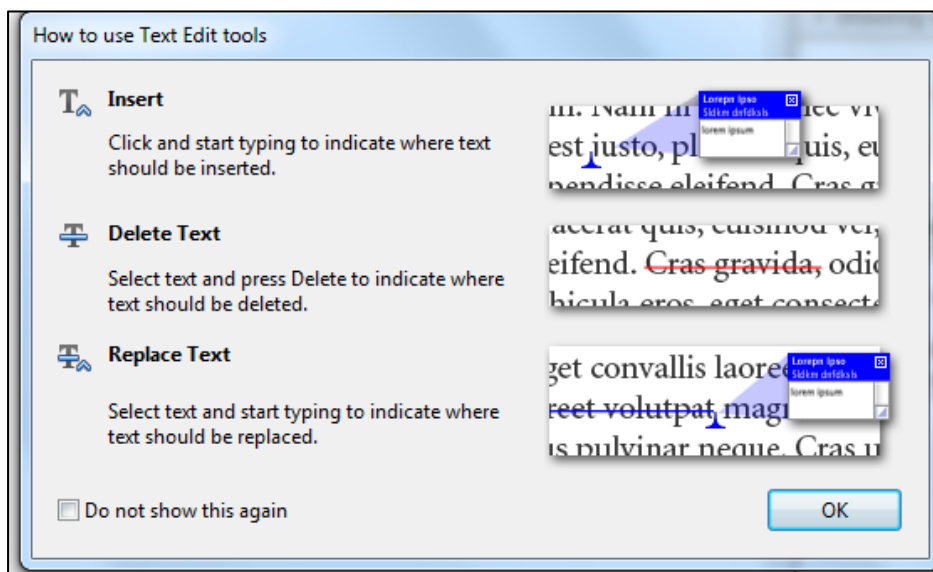
Drawing mark-ups box, from left to right:
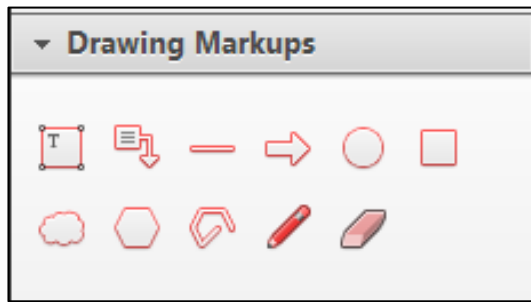
Top row:
- Add text box: you can type instructions or queries in this box
- Add text callout: similar to the text box, but with an arrow that you can use to point out the relevant text
- Draw line
- Draw arrow
- Draw oval (you can draw a circle by holding the Shift key at the same time)
- Draw rectangle (you can draw a square by holding the Shift key at the same time)

Second row:
- Draw cloud: drag the mouse with the left button held down, lifting your finger off the button and clicking again to turn a corner – click on the start point to finish the shape
- Draw polygon: use the mouse as for the cloud – when you double-click, the shape will complete itself
- Draw connected lines: as for the cloud and polygon
- Draw free form
- Erase free form drawing: click on the drawing and drag the tool along it

To use these tools, identify the text you wish to amend, then select the appropriate tool by clicking on it. When you next click on the text, you will find that the selected tool is now active at your cursor. In most cases, when you have used that tool, it will simply become inactive once more – others (e.g. highlighter and the pencil tool) do remain active, so be careful that you don't end up with markings you didn't intend! You have the option to make the other tools active until you have finished with them – one of the ways in which you can customise the tools to your own preference.

You can also customise many individual aspects of the tools, such as their colour, as well as the colour, type size and font of the 'Add text comment (typewriter)' tool.

Comments list: this list shows all the comments and changes made on the document. Click on the comment to be taken to the relevant place in the text; click on the highlighted text to reveal the comment.
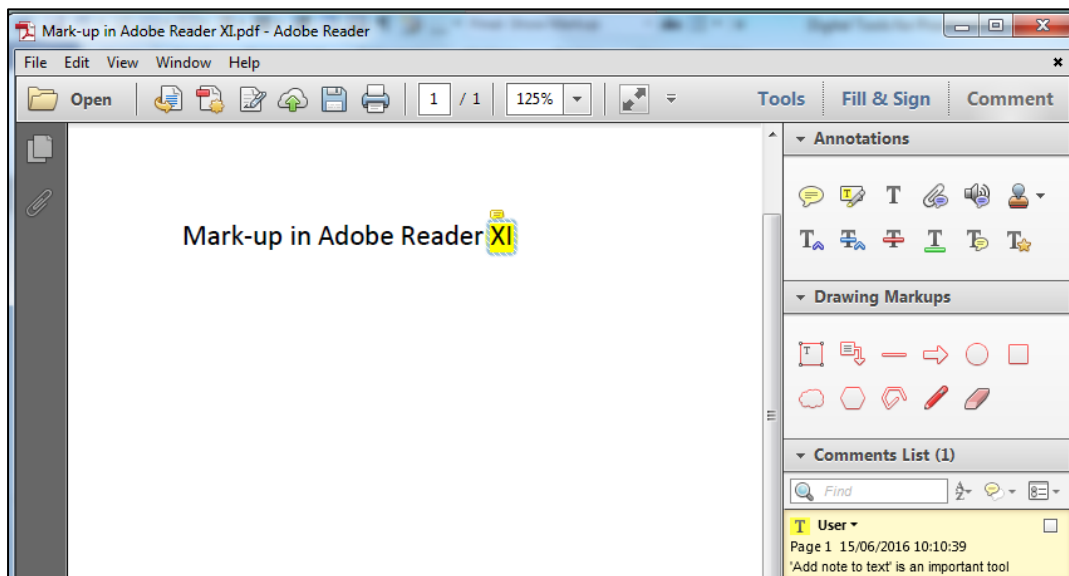
In the box containing the comment itself, there is a blank square in one corner: this is for whoever reads your comments and acts on them. When your comment has been dealt with, this box can be ticked to show that it's finished with.
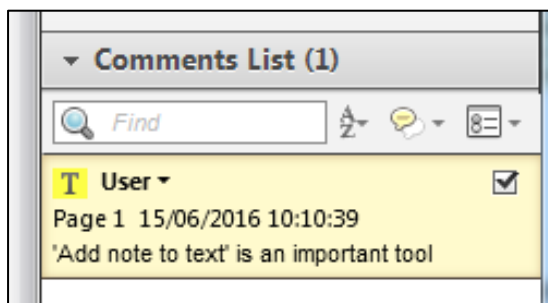
You can also 'mouse over' the highlighted text and the comment will pop up in a box by the cursor.
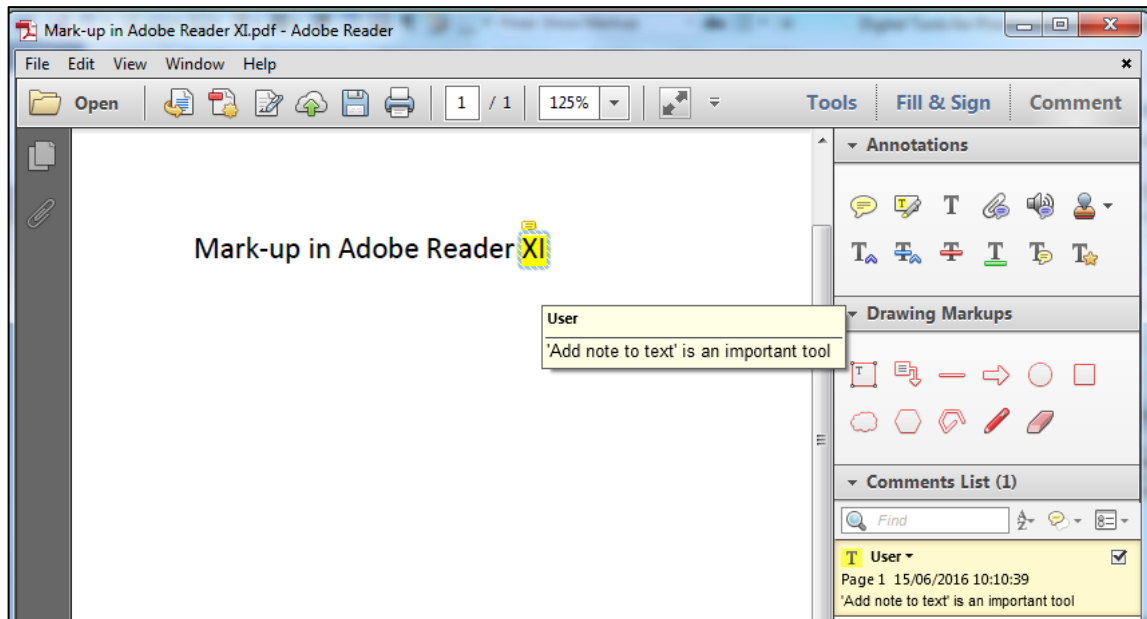
A tool not shown in these boxes is the 'hand' tool, which you can select by right-clicking anywhere on the page or pressing the 'Esc' button. The hand tool (which looks like a little fist) allows you to move the page around on the screen without the danger of creating mark-up that you didn't intend!

You will not need many of these tools in this course: we will concentrate on using the basic ones at this stage. When you feel that you are happy to tackle more complex procedures, you will be ready to take the PTC's 'Digital Proofreading' course.

Adobe Reader DC

Reader DC (which stands for 'Document Cloud') is the version of Reader that followed XI. It has the same tools but in a layout that is perhaps less friendly to the novice! This is why we showed XI first. Again, we show those tools below.

This is what the screen looks like when you open a document, click on the 'Tools' tab and select 'Comment' to bring up the commenting and annotation tools into your document:

Mark-up in Adobe Reader DC
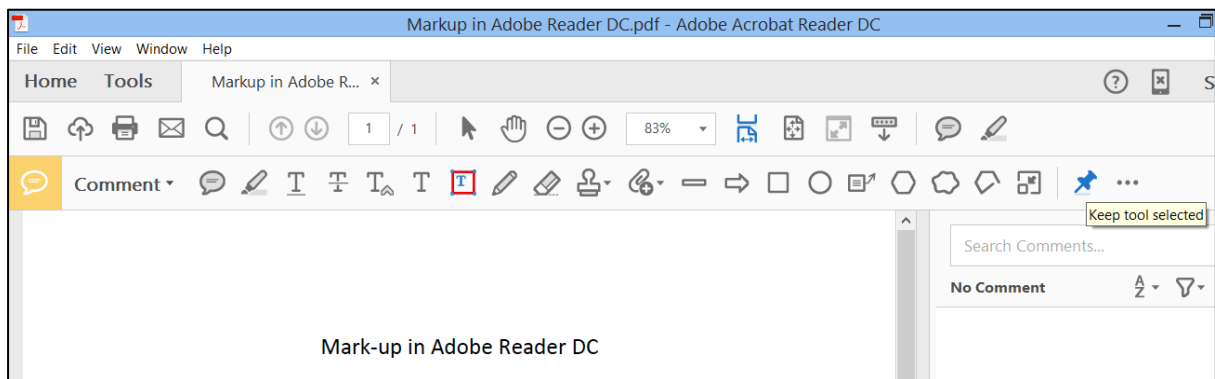
In the row above the tools, note two important features: the 'hand' tool, that allows you to navigate the pages without leaving any mark; and the 'arrow' tool that allows you to select text that you wish to mark.

Reading from left to right, the tools in the 'Comment' line are:
- Add sticky note
- Highlight text
- Underline text
- Strikethrough text
- Insert text at cursor
- Add text comment ('typewriter')
- Add text box
- Draw free form
- Erase drawing
- Add stamp
- Add a new attachment (you can attach a file or record audio)
- Draw line (draw a straight line by holding the Shift key)
- Draw arrow (draw a straight arrow by holding the Shift key)
- Draw rectangle (draw a square by holding the Shift key)
- Draw oval (draw a circle by holding the Shift key)
- Add text callout
- Draw polygon (to complete the polygon, click the start point)
- Draw cloud (to complete the cloud, click the start point)
- Draw connected lines (to end the lines, double-click the last point)
- Collapse Drawing Tools
- Keep tool selected

At the end of that list is a very useful feature, 'Keep tool selected': clicking on the 'pin' symbol allows you to keep a tool selected for multiple uses. You can see that 'Add text box' is 'live' on the document shown here (it's in colour, unlike the others), and 'Keep tool selected' has been clicked. This will allow the proofreader to use this symbol as often as they like without having to click on it each time.

You might notice that two tools previously available on the Tools menu do not appear here: 'Replace text' and 'Add note to text'. You can still access these tools in the following way:

- 'Replace text': using the arrow tool (next to the hand tool in the row above the Comment icons), select the text you wish to replace and then simply start typing. The change will show as a strikethrough of the old wording along with the 'insert' symbol that indicates replacement wording; the accompanying comment box describes this as 'Replace Text'.
- 'Add note to text': again using the arrow tool, select the text and right-click; a menu containing 'Add note to text' will open.

These two moves are shown in the following screenshot, where the word 'Mark-up' has been replaced with 'Annotations', and 'DC' is about to have a note added:
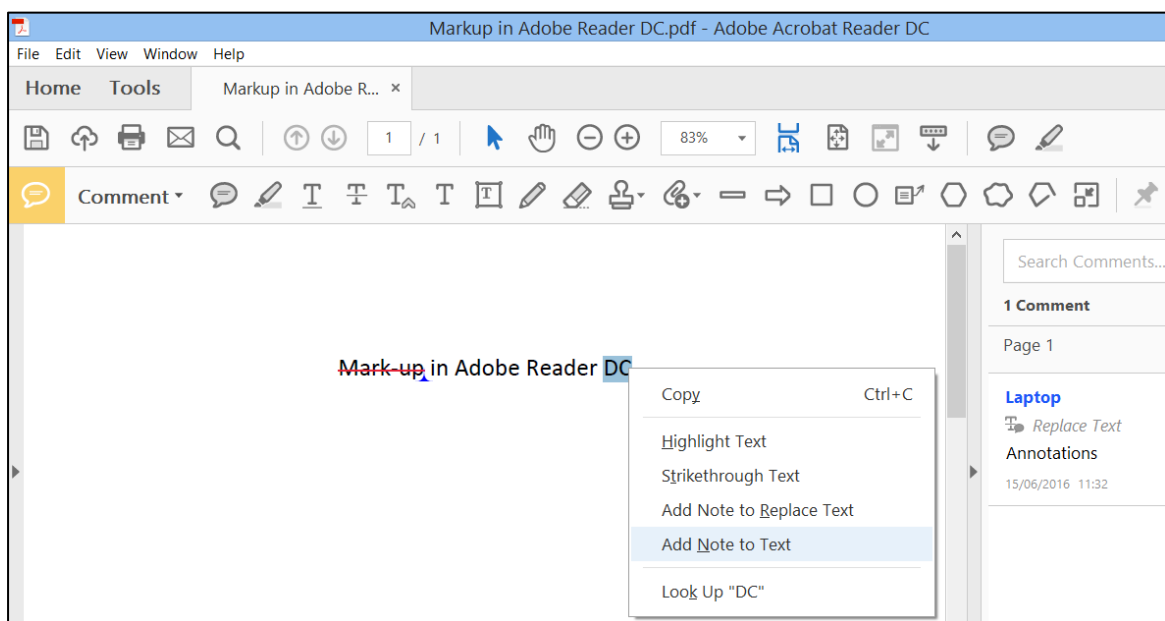

In this course we will be concentrating on simple mark-up using these tools, so don't worry for now about grasping all the other functions that Adobe Reader is capable of – you can enjoy learning about those in a more specialised course.

## Manipulating the mark-up: position, size and appearance

You can dictate the position and size of any of the mark-ups. When you click on a shape, it will appear enclosed in a box with squares at the corners and sides – this shows that the shape is 'live' and able to be manipulated. Move the mouse until a four-way arrow appears: this allows you to move the shape anywhere you wish, simply by dragging with the mouse. When you

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mouse over any of the squares in the outline, a two-way arrow appears: this allows you to expand or contract the shape by dragging the mouse, until the shape is the size you wish.

The screenshots below (DC then XI) show a shape 'live' and able to be moved or re-sized. The four-way arrow on the text callout box shows that it can be moved anywhere on the page as one unit; the arrow tip can also be moved independently by clicking on the box at the tip, so that you can be precise about what it's pointing to.
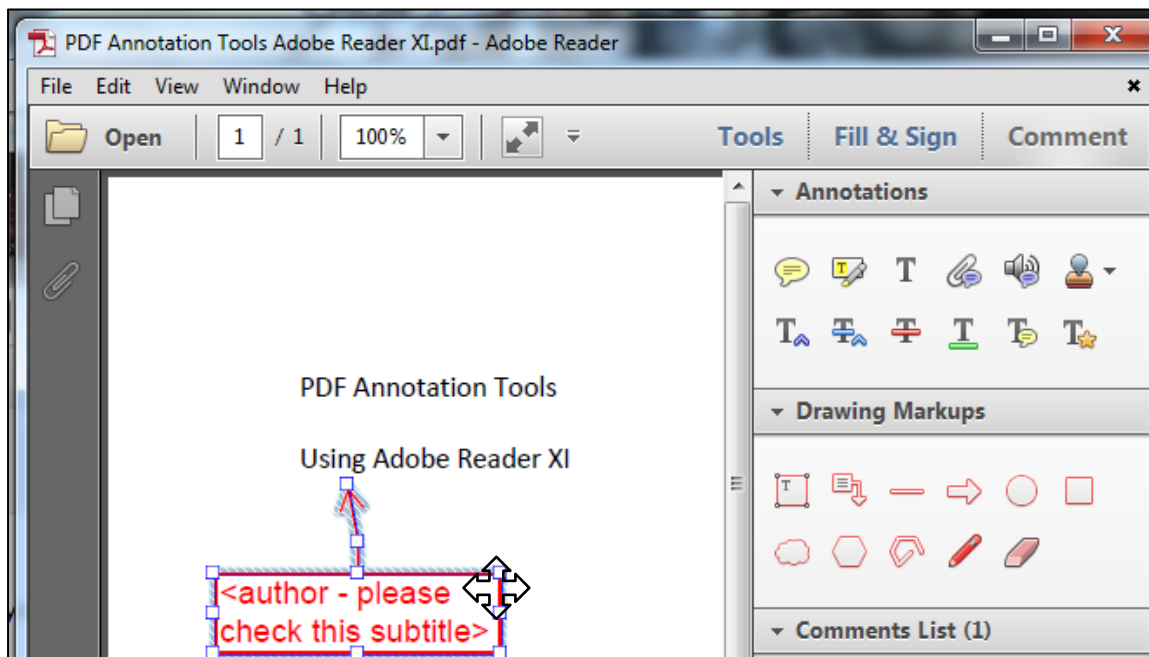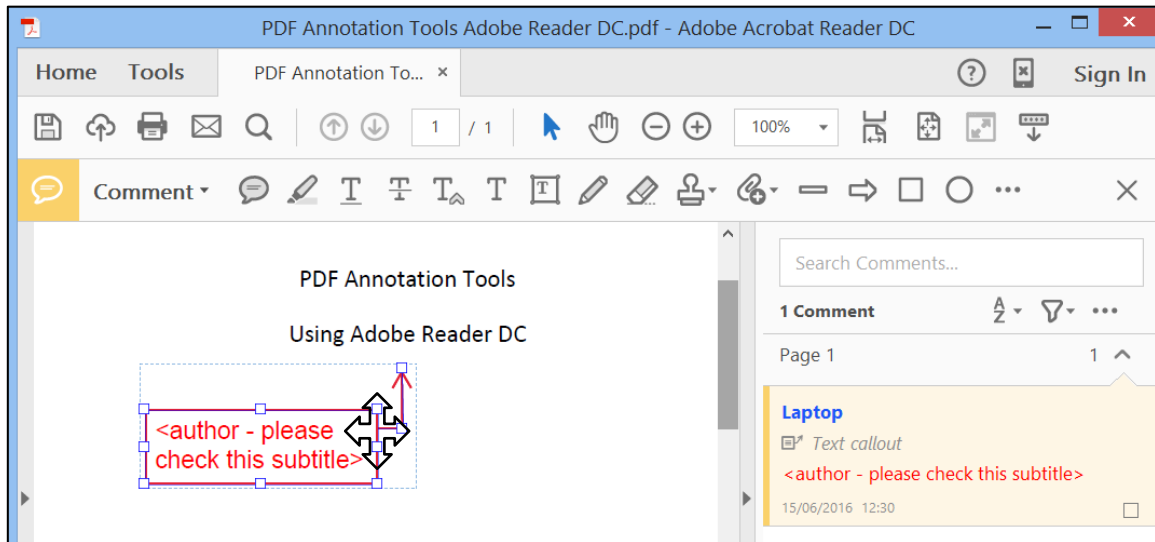
The following screenshots show the double-headed arrow that allows you to re-size the shape by dragging with the mouse:
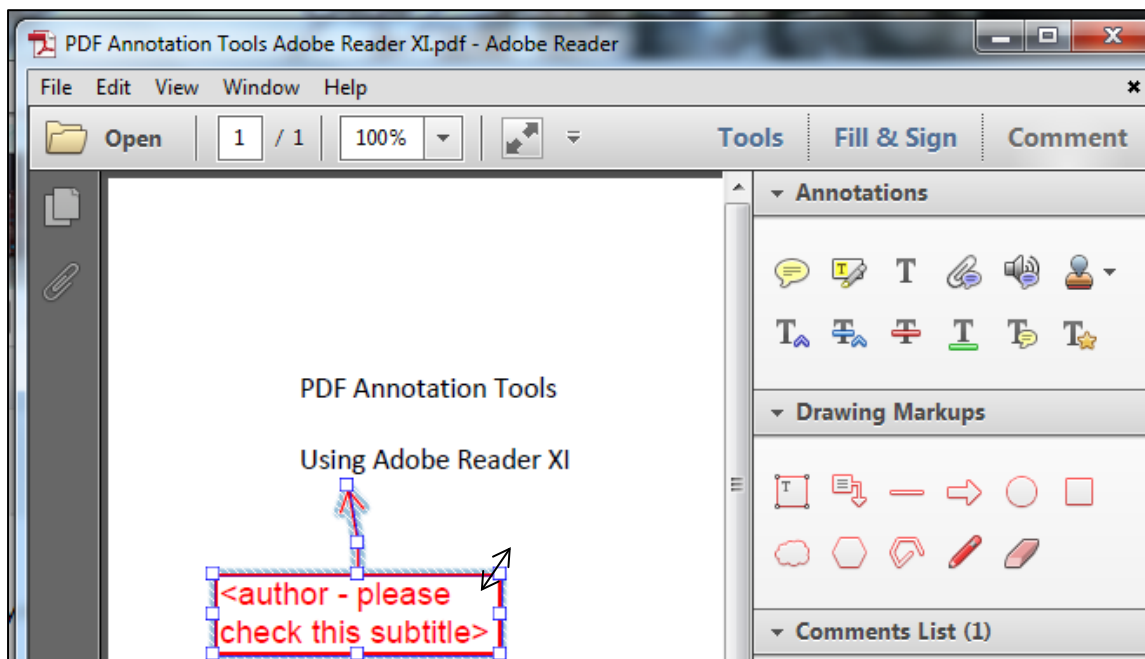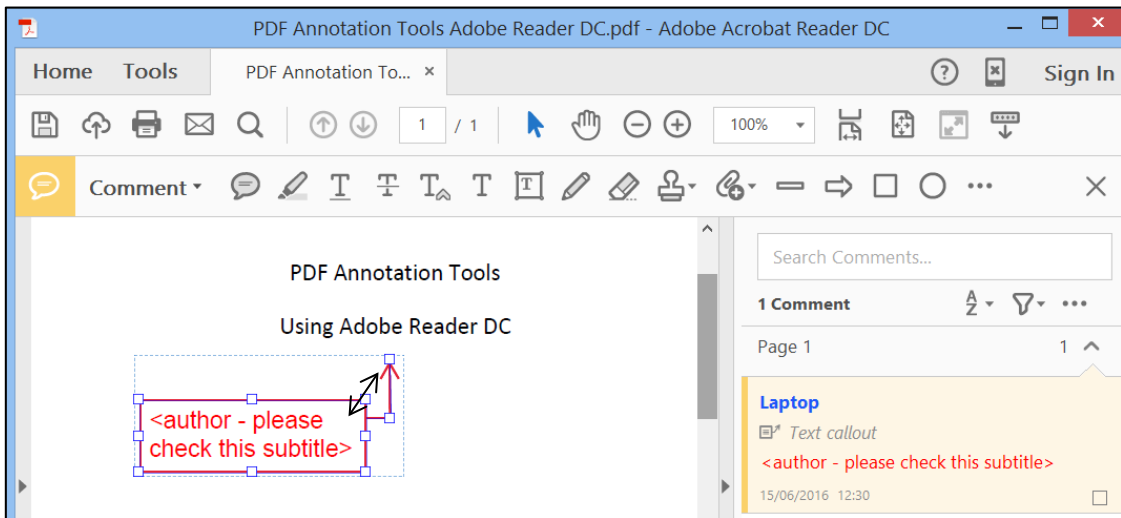
With regard to appearance, you can customise many aspects of these mark-ups to your own preferences. For example, if you wish to change the colour of those boxes, or the thickness of their lines, you can do so by right-clicking on the box, which brings up a dialogue box as shown below. Select the final item, 'Properties'.
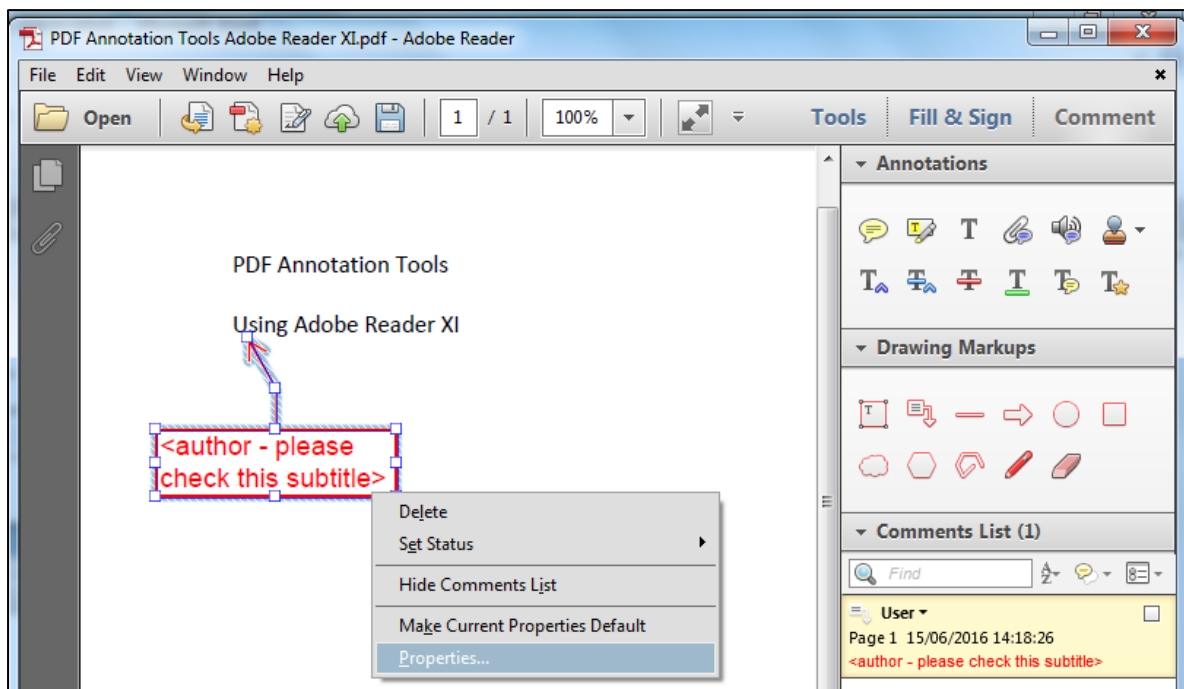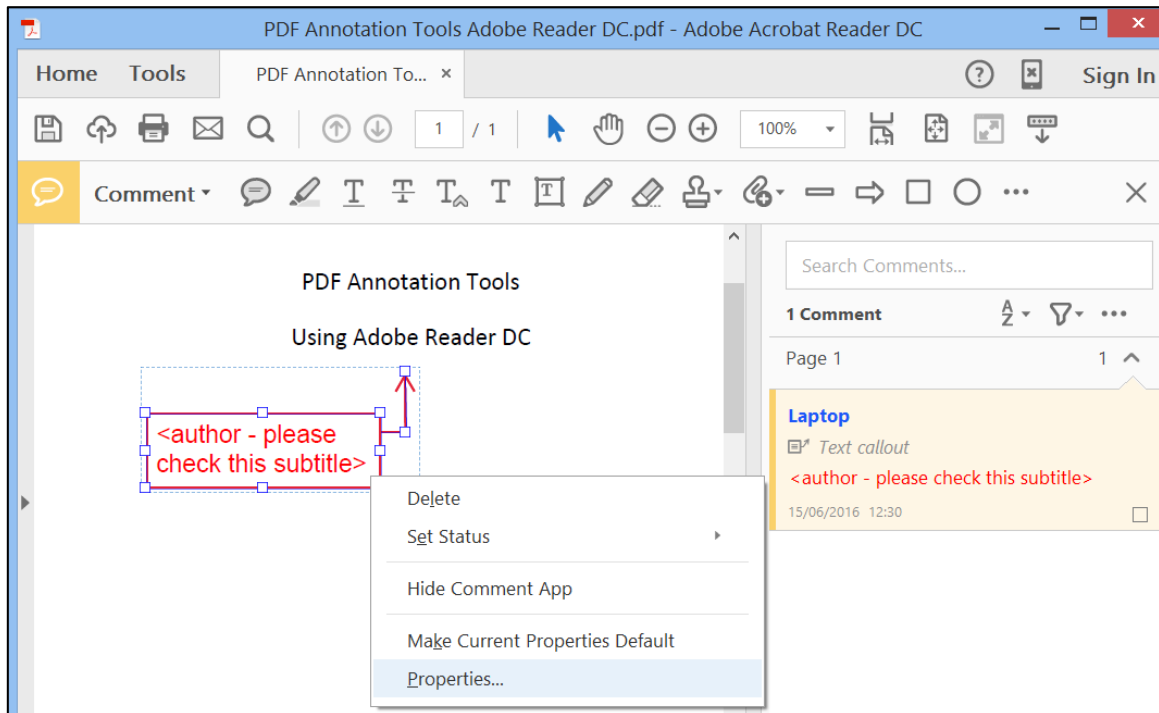
The 'Properties' box shows you all the features of the item that you have selected, and allows you to choose from a range of alternatives. This can be useful if more than one person has input to a document: you can allocate each person a different colour, and see at a glance who has written what. In the screenshots below, you can see the choices made by this proofreader for

the style of the callout box: line endings are open (rather than rounded, diamond-shaped, and so on), line thickness is 1 pt (don't worry about technicalities such as point size for now!), the line style is a continuous line (rather than dotted, or dashed, or wavy), there is no fill colour (that is, the wording in the box has a white background), and the border colour is red. When you have chosen your preferences, you can tick 'Make Properties Default' to keep those preferences as the form used until you change your mind again!
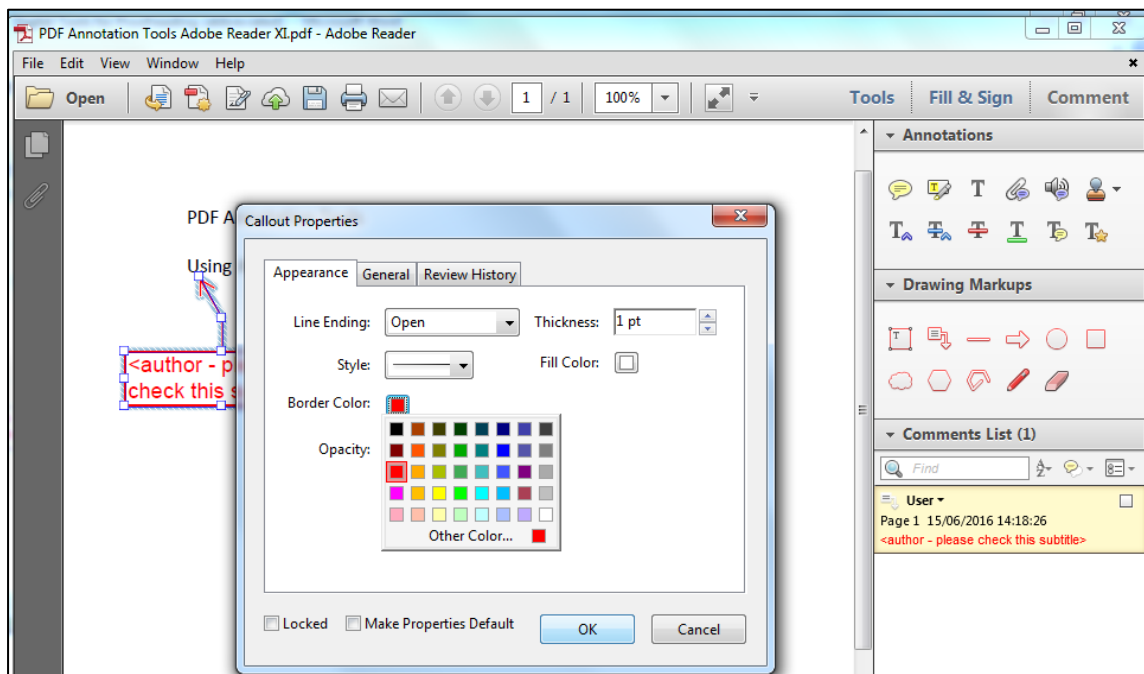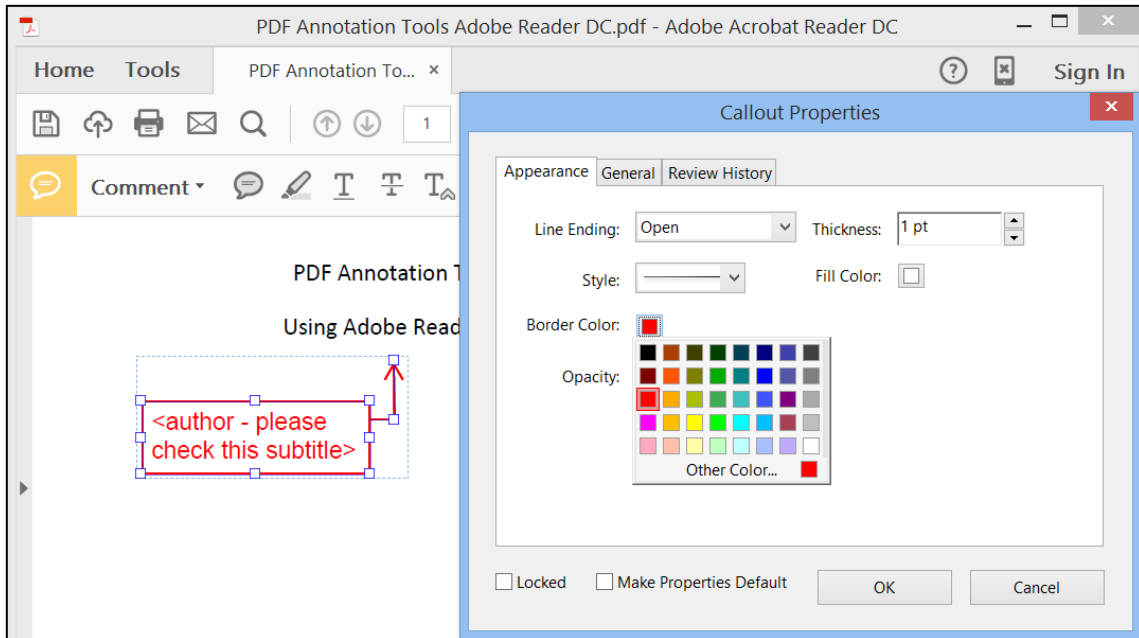

The best way to familiarise yourself with all of this is simply to have a go! You won't damage the PDF, so just experiment until you feel confident in using the tools. If you make a mistake and write mark-up that you did not intend, or that you then wish to remove, the remedy is simple: Ctrl + Z will undo what you have just done, or you can right-click on the marking and select 'Delete'.

Searching PDFs

One of the most helpful aspects of working on screen is that you can search the PDF for words and phrases; this can save a great deal of time if you find that something is inconsistent and you need to pick up every instance.

The system works the same way in both Adobe Reader DC and XI. To open the 'Find' box from the keyboard, press Ctrl + F: a little box will open below the toolbar. Type in the word you want to find, then select (using the 'Previous' and 'Next' options) whether you want to search backwards through the previous pages or forwards through the following pages. If you click the downward-pointing 'search options' arrow you have the option to open 'Full Reader Search': this allows you to search more than one document, and it will provide you with a count of the number of instances of each item you search for. This menu also allows you to specify your search in more detail (e.g. looking for whole words only, case sensitivity, or whether you want to search only the text or the comments as well). The screenshots below show the word 'PDFs' in the 'search' box, with 'Whole Words Only', 'Case Sensitive' and 'Include Comments' selected using the 'search options' arrow.
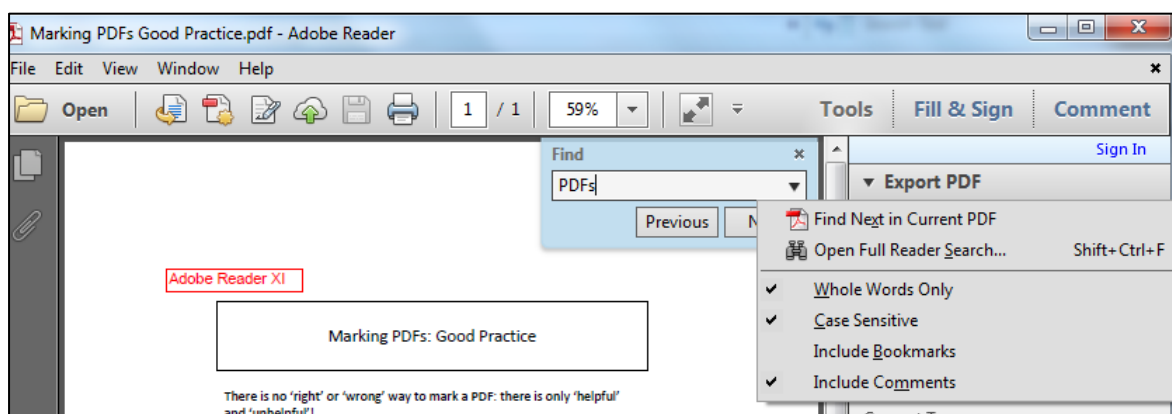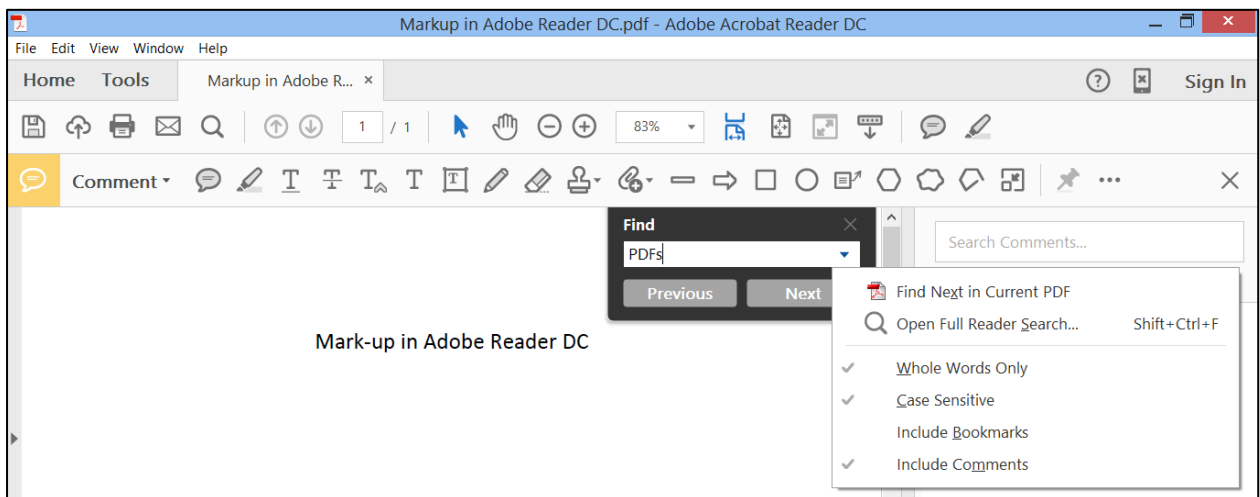
## Comparing two documents side by side on screen

When you have corrected a proof and returned it to your supervisor, you might then be sent a revised proof and asked to check that the corrections have been made (and made accurately!). Or you might be asked to check someone else's work. This is where having a wide screen, or working with two screens, comes into its own. If you still have a small, narrow screen, it's worth investing in a larger one so that comparing documents side by side becomes easy and comfortable.

This is how to do it in Adobe Reader.

1: Open the PDF of the first document, then in 'Window' select 'Tile', then 'vertically':
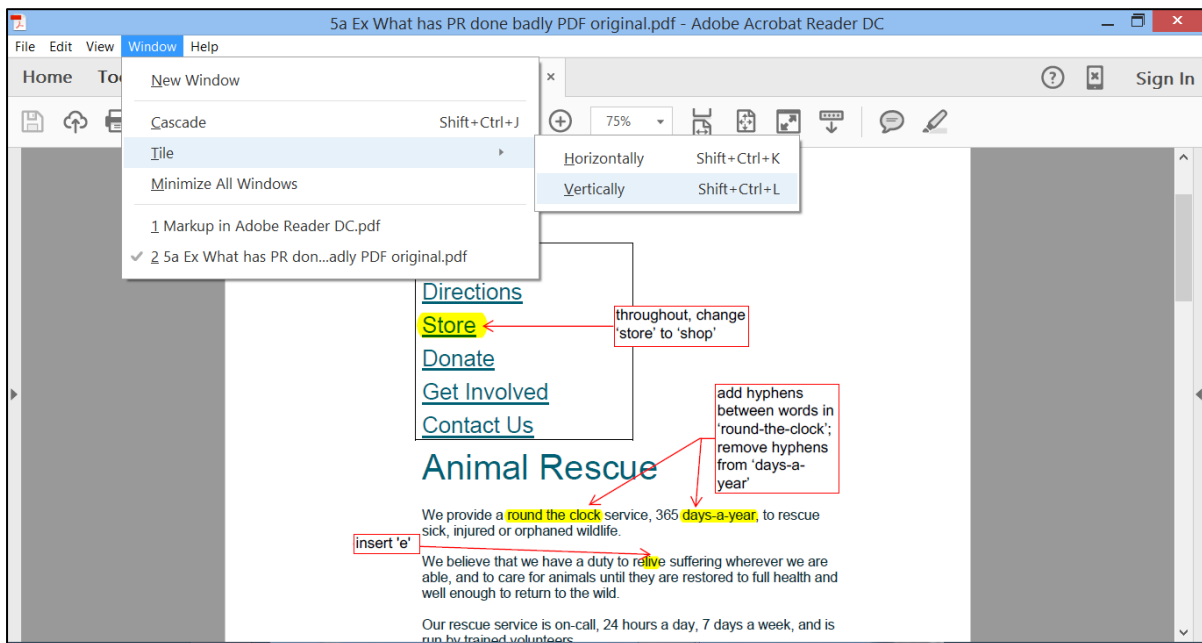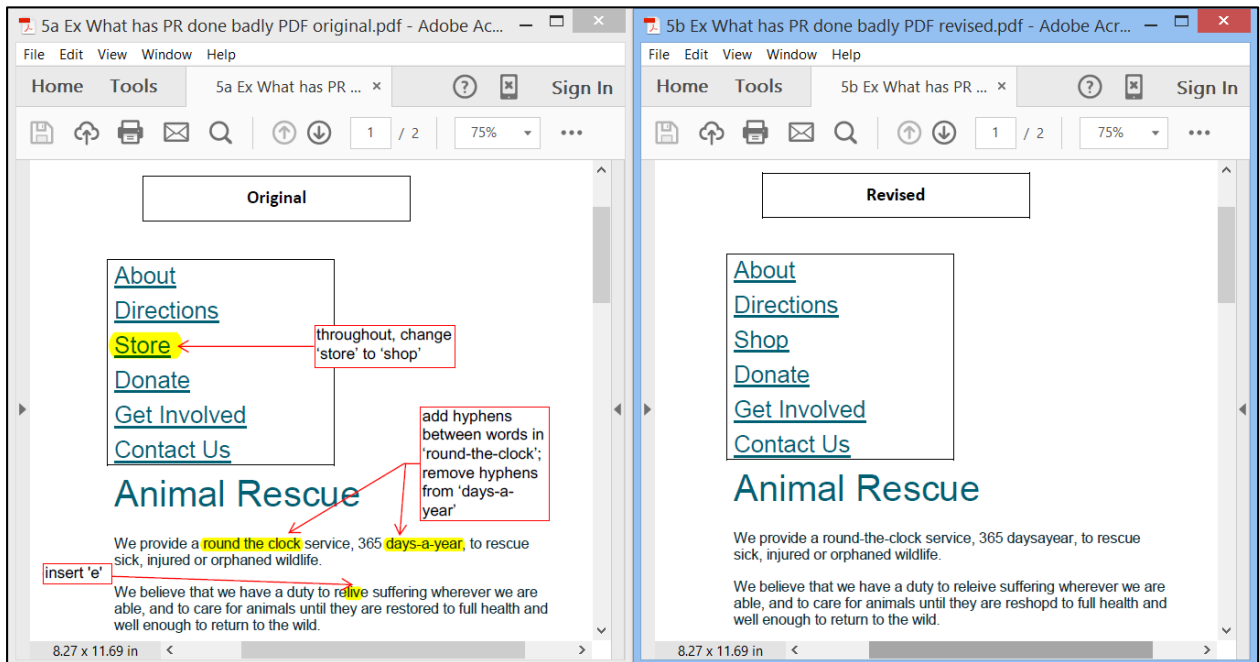

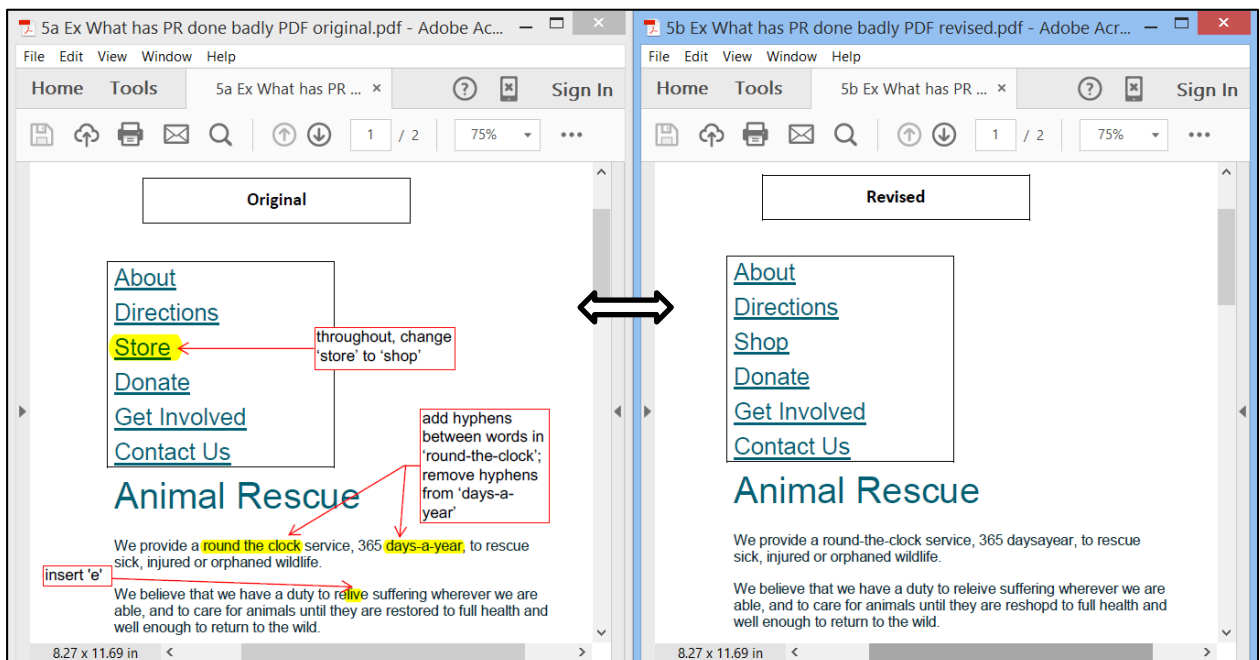2: The document now occupies only half of the screen:
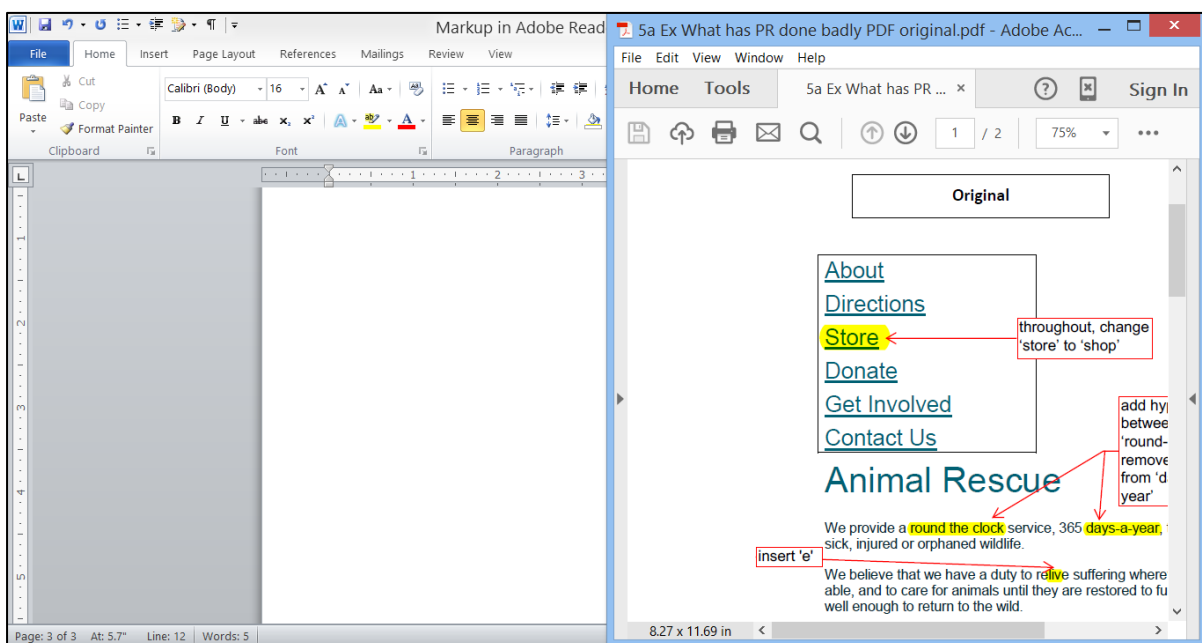
3: Open the PDF of the second document, and 'Tile' that too – the two documents are now side by side:
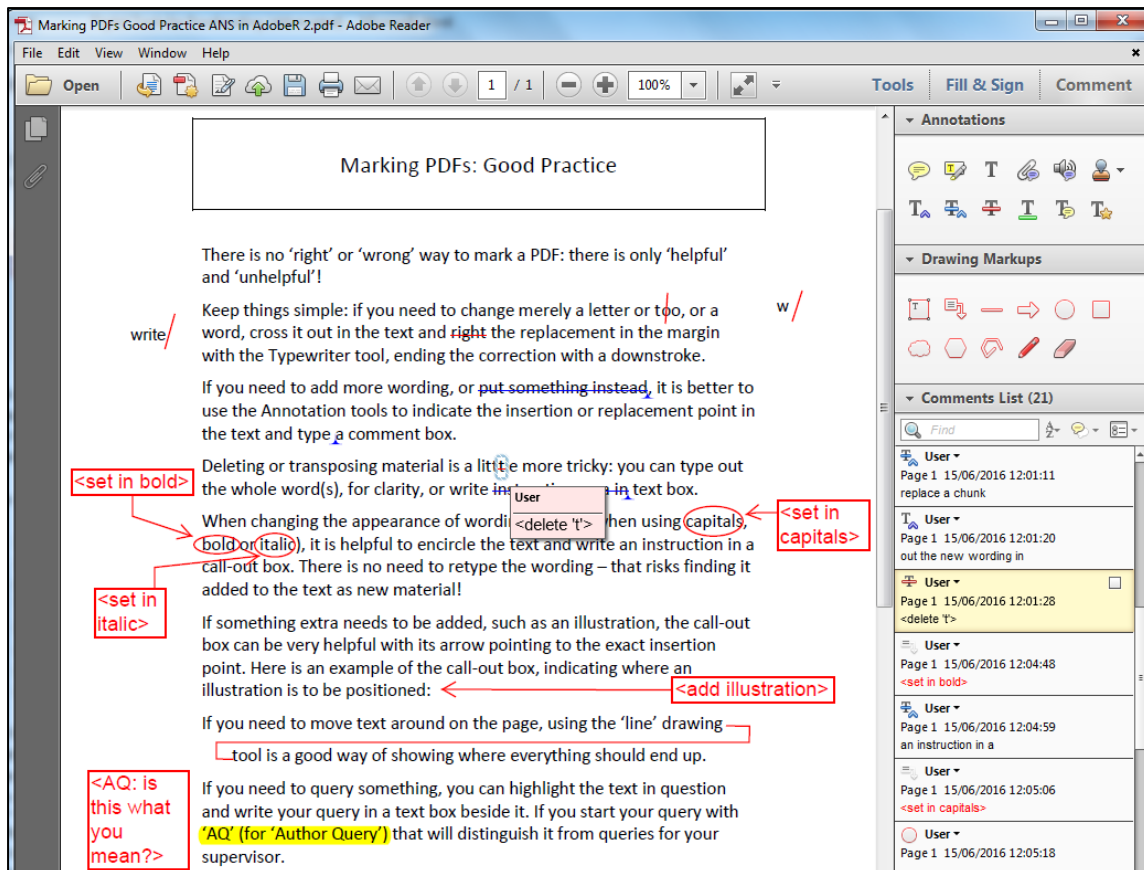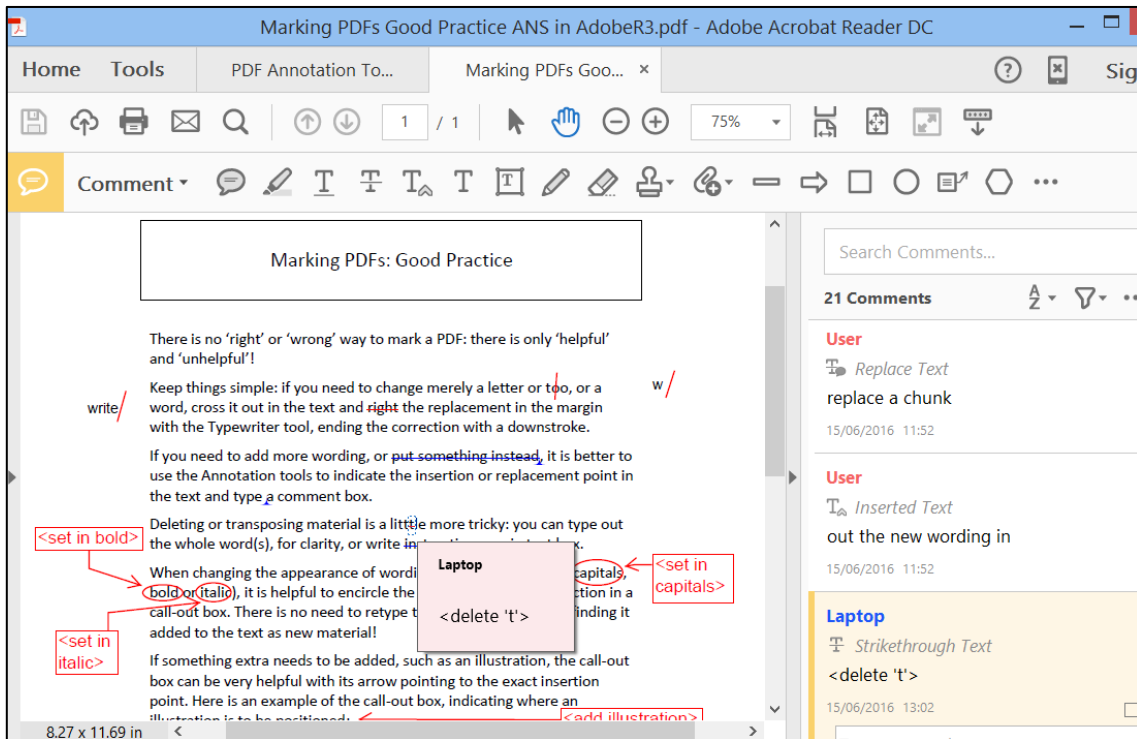

4: A two-headed arrow will appear when you mouse over the document borders: hold down the left-hand mouse button to move the arrow and drag the edges in or out, for optimum viewing:

3 The PDF mark-up in use

The screenshots below show a range of correction methods using Adobe Reader: first DC, then XI.

On this document, the first two corrections were made by using 'Add text comment' (the capital T icon in the top row of Annotations); this acts like a typewriter and allows you to type in the margin. The end of the correction is indicated by the slanting line created by the 'Line' tool – this method confirms that the correction is complete.

Longer corrections or changes to wording have been made in different ways:

- in the first line of the third paragraph the replacement text for 'put something instead' has been typed as a comment connected to the 'add note to replace text' symbol – it is shown at the top of the Comments List pane, and reads 'replace a chunk'
- in the last line of the third paragraph is an insertion, shown by the little blue arrow between the words 'type a': the material to be inserted is in the second comment box, 'out the new wording in' (so the finished sentence will read 'type out the new wording in a comment box').

In the fourth paragraph, the deletion of the extra 't' in 'little' has been done using the 'Strikethrough' cross-out line – on its own this is difficult to see, and the proofreader felt happier by typing an accompanying note, <delete 't'>. Mousing over the marking brings up the content of that change on to the screen, as shown; clicking on it will highlight the accompanying comment in the Comments List. In the comment, notice the blank square in the corner: this is the 'check box', which will be ticked when the person correcting your marked proofs has carried out the instruction you give. This ensures that nothing will be overlooked, even if it's tiny and hard to spot visually on the page, as in this instance.

In the next paragraph, describing the appearance of text, encircling shows which words are to be changed in some way, and the instruction in the accompanying callout boxes spells out the changes needed.

Notice something very important: the proofreader has helped whoever will be reading their comments by making it clear which wording is part of the text and which is instruction. They have shown the latter by enclosing those instructions in angle brackets:

- <set in capitals> = this is an instruction
- replace a chunk = no angle brackets, so this is replacement text

If the person reading your marked proofs cannot tell one from the other, you might end up with some interesting results – it really does happen!

The use of angle brackets in a comment is also a good method for raising queries. It's especially helpful if you preface queries to the author with 'AQ', so that your supervisor knows who you are asking. Ask the author to clarify anything concerning the content; ask your supervisor anything concerning the publishing process itself. On the screenshot, this has been done at the highlighted words with the accompanying query in the text box beside it.