

## University Directory Update: How to submit updates for the Offices of Administration, Departmental Fax Numbers, and Directory of Organizations PDF sections

Use the following electronic process to submit department updates for the above sections of the directory. These steps need to be repeated for each PDF section being updated.

1. Go the Directory website: <http://update.directory.yale.edu> and **open the PDF file** of the directory section you wish to change; PDF links are located to the far right of the top navigation.
2. **Save** the PDF file to your computer
3. **Open** the PDF file and edit the PDF (markup instructions found below)
4. Use the **SAVE As** feature to rename the PDF file using the following naming convention:
  - Org Abbreviation\_PDF Section\_Your Initials\_Date.pdf
  - **Filename should have 4 sections: HRODLC\_FAX\_KG\_072515.pdf**
    - a) Org Name: use the same abbreviation for all the org files and limit to 6 letters
    - b) PDF Section abbreviations: CAL, ORG, FAX, ADM.
    - c) Your initials: limit to 3 initials
    - d) Date format: mmddyy
5. **Open the [Directory Update Cover Form](#)** found in the Directory Tools drop-down box on the Directory website.
6. **Complete** the Directory Update Cover Form following the instructions on the form
7. Click **Submit** to upload the Cover Form, PDF markup file, and any supporting Word or Excel files
8. **Complete this process for each PDF section (three times):** Org, Fax, Adm.
  - If you do not have any edits, submit the Directory Update Cover Form and select the option: **No changes to be made.** *Please do not upload a blank PDF form, just submit the cover form.*

**\* NOTE:** *Please do NOT submit markups more than one time.*


*If you forgot to include some changes, **submit additional changes in a separate PDF markup file, do not add changes to a PDF you've already submitted.***

### Adobe Acrobat Professional

Use Adobe Acrobat Professional to markup (or edit) the pdf file. Download Adobe Acrobat Pro XI from the ITS Software Library <http://www.yale.edu/its/software/>. If you need help, contact the Help Desk at 432-9000.

*These instructions are written for Adobe Acrobat Reader XI; instructions are very similar for other versions.*

### Annotation tools used to Markup the pdf File

1. **Open the PDF** file using Adobe Acrobat Professional
2. Look on the right panel to see if the annotation tools are visible. If not, to open the markup tools: Go to the menu bar and select **View** → **Comment** → **Annotations**  
**OR** Select the Comment button on the top right (if visible): 
3. The mark-up tools for annotating the pdf will appear in a pane on the right.

### Using the PDF Markup Tools:

- Limit your edits to these four markup tools:



Insert additional text at cursor



Replace selected text



Highlight text and insert note



Cross out text for deletion

- Use the Sticky Note  tool to make **general comments about an entire section**, not for specific text edits








## How to Markup the PDF file

### To insert annotations in the PDF file:

1. Select the text to be edited
2. Click one of the annotation tools below
3. A comment box will open
4. Type the corrections or changes into the comment box.

### Managing Comment boxes:

- To close the comment box: Click the minus sign in the top right corner of the text box, or click off the box
- To open or edit a comment: Double-click the annotation mark to open up the text box.
- To delete an edit: Click on the annotation mark and press the delete key.
- To read a comment: Hover over the annotation mark.
- To move a comment box: Drag the comment box to any location on the page

	Insert Text at cursor	Use this tool to indicate where additional text needs to be inserted
	Replace Selected Text	Use this tool to indicate text that is to <b>be removed and replaced by other text</b> . Type the new text in the text comment box that opens when you use this tool.
	Cross out Text for Deletion	Use this <b>strikethrough</b> tool for text that is to be deleted <b>with no replacement text</b> .
	Add Note to Selected Text	<b>This tool will highlight text and open a comment box where you can type your notes and edits.</b>  <b>Use the highlight tools</b> when editing text (a single word, name, number, sentence, or line of text). The highlight tool has the benefit of not obscuring the original text the way strikethrough tools do.
 Hand Tool  Select Tool		If your pointer appears as the Hand Tool click the Select Tool icon on the top toolbar in order to select text.
	Sticky Notes Tool	Use this tool sparingly! <b>Only use the Sticky Note when making a comment about an entire section.</b>  <b>Do NOT use the Sticky Note tool when editing a single word or line of text.</b>  Click the Sticky Note tool, then click in a blank area of the PDF page to anchor the note to that spot on the page.  Use Sticky Notes for making general comments to large areas of text.

## Major Revisions or Department Reorganizations

If you have an entire section that needs to be changed:

1. Type the changes in Word (or Excel)
  - Do not convert this to a PDF file
2. Insert a Sticky Note in the PDF with this comment: *Changes for this section are in an Word (Excel) file named \_\_\_\_*
  - Include the filename of the Word/Excel file in the Sticky Note
3. Upload both PDF and the Word (or Excel) files and submit via the Directory Update Cover Form.

## PDF Mark-Up Guidelines

- **Use when adding several staff names to the same section, list all names in one comment box.**  
The typesetter knows to put them into alphabetical order. Type them in a column so the typesetter can easily copy and paste the names. *Please do not insert a separate annotation for each name.*
- **Please do not submit any handwritten edits.**  
Use the PDF Mark-up tools to make all changes.
- **Please do not submit changes multiple times.**  
If you have additional changes, download a clean PDF from the directory website ( [www.yale.edu/directory](http://www.yale.edu/directory) ) and use the mark-up tools to submit edits that have not yet been submitted.

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## PDF, Word and Excel File Tips

- **Save your files with the following naming convention:**  
Before uploading your files, save them using the following naming convention – use this naming convention for PDF, Word and Excel files:  
**ORG\_PDF section\_Initials\_Date** Example: FASYMT\_ORG\_KG\_081015
- **If you have an entire section that needs to be revised it might be easier to type the section in Word or Excel.** Use the **Sticky Note** or the **Add Note to Text** mark-up tool in the PDF to indicate which sections have edits in the Word (or Excel) file. Please include the Word (or Excel) file name in the PDF mark-up comment box.
- **Please do not convert Word or Excel files to PDF files.**  
This prevents the editor from using copy and paste tools easily.
- **Please do not submit any scanned files.**  
All files submitted must be saved in Word, Excel, or Adobe Acrobat Professional format.

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## Directory Cover Form Upload Tips

- **No changes to your PDF? Please do not submit a blank PDF form.**  
Be sure to submit a Directory Update Cover Form for each of the PDF sections (ORG, ADM & FAX), and select the option: **No changes to be made.** There is no need to submit a blank PDF if there are no edits.
- **Use the Directory Cover Form on the Directory website to upload the files.**  
The Directory Update Cover form can be found in the Directory Tools dropdown box on the Directory website.

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## Additional Help

- **View the video on the University's online training website.**
  1. **Go to:** [www.lynda.com/portal/yale](http://www.lynda.com/portal/yale)
  2. **Setup your account** (enter first name, last name, email address – that's it)
  3. In the search box type: **Building PDFs with Acrobat XI**
  4. View the video: **Chapter 6: Using the commenting tools** (*fast forward to five-minute mark of video*)
- **Contact the Directory Update Team: [directory@yale.edu](mailto:directory@yale.edu)**