



UNIVERSITY OF CENTRAL FLORIDA
COLLEGE OF GRADUATE STUDIES

Step 6: Bookmarks

This PDF explains Step 6 of the step-by-step instructions that will help you correctly format your ETD to meet UCF formatting requirements.

UCF requires that all major and chapter headings and at least first-level subheadings within the ETD have a corresponding PDF bookmark.

This step will show you how to check your bookmarks in Word before you convert to PDF – and how to make minor adjustments after the conversion.

About Bookmarks

For many students, creating proper bookmarks can be one of the more confounding areas of formatting the ETD.

When done correctly, Word will automatically create bookmarks for all headings and subheadings the user determines should appear. When done incorrectly, Word may create additional and leave out intended bookmarks.

To appreciate the role of bookmarks, consider their closest formatting relative, the TABLE OF CONTENTS.

Like the TOC, bookmarks give the reader an easy way to appreciate the flow of and navigate through the document. Like the TOC, bookmarks should reflect the same formatting and hierarchy as found within the document (minus underline, italics and bolding).

However, bookmarks do vary slightly from the TABLE OF CONTENTS. Bookmarks should contain all major and chapter headings and at least the first-level subheadings. This includes the precontent, like the ABSTRACT, ACKNOWLEDGMENTS and the TABLE OF CONTENTS itself.

The TABLE OF CONTENTS, by contrast, contains only those pages which follow the TABLE OF CONTENTS in the document. The TABLE OF CONTENTS should also include all subheadings, rather than merely the first-level subheads. You are certainly welcome to include all subheadings in the bookmarks, but only the first-level are required.

Obviously, to create a heading that appears in the bookmarks but not in the TABLE OF CONTENTS requires some special treatment. This file will address the bookmark portion of that problem. See the TABLE OF CONTENTS help file for steps to complete the other part.

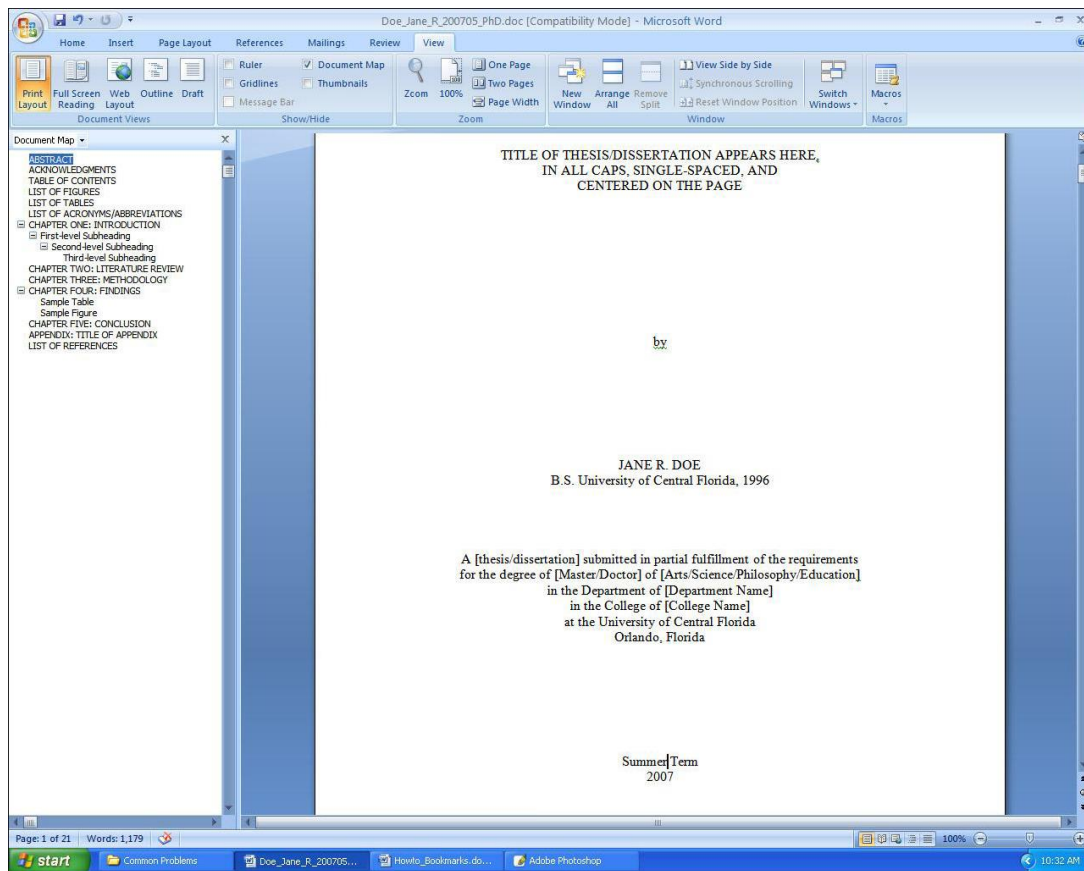
Previewing the Bookmarks

The most effective way to preview what will become your PDF bookmarks is to use Word's "Document Map" function.

- Click on the last tab, labeled View.
- In the Show/Hide section, you will see a little box labeled Document Map. Click on it.



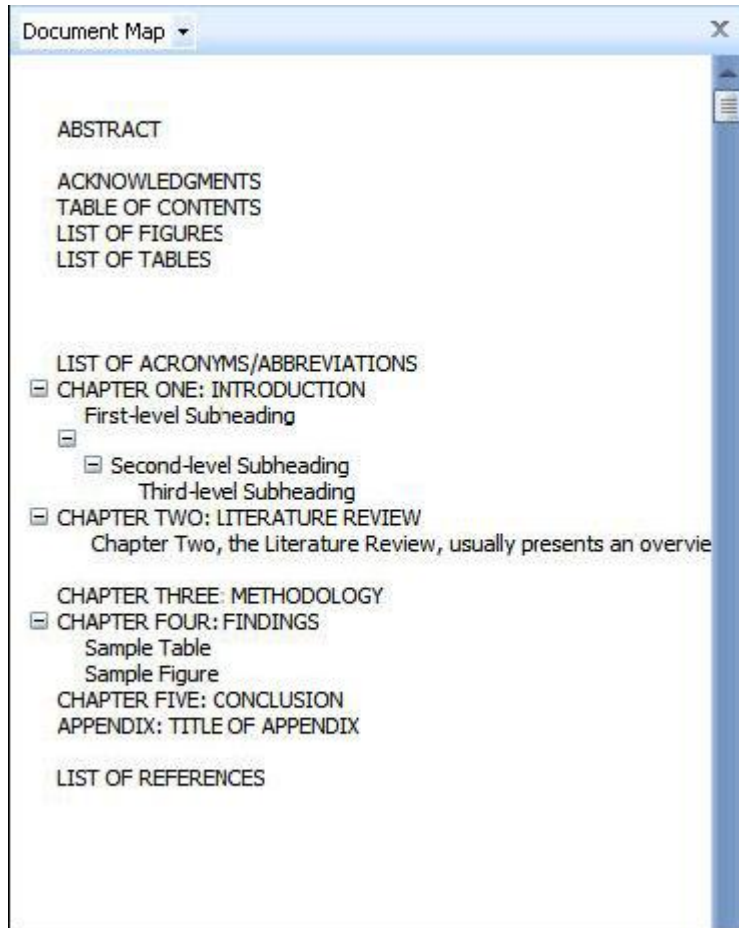
This will open your Document Map to the left of your actual document, as so:



The document map should reflect the same headings, subheadings and hierarchy that will appear in the bookmarks after the PDF conversion.

So, if the items in the Document Map have unintended characteristics, they will have those same attributes in the PDF version.

If you have blank bookmarks, paragraphs marked as Heading styles or individual tables or figures that accidentally appear, your Document Map can look like this:



To eliminate a blank bookmark, click on the blank line in the Document Map. This should take you to the actual place in the document referenced.

In the Home tab, you will see a section of the ribbon called “Styles.” In the lower right-hand corner of this section you will see a little diagonal arrow. Click on the arrow to bring up the Styles menu, then look at formatting of the line to determine how the blank bookmark appeared.

Was it originally a Heading or Subheading style that you modified using the regular toolbar?

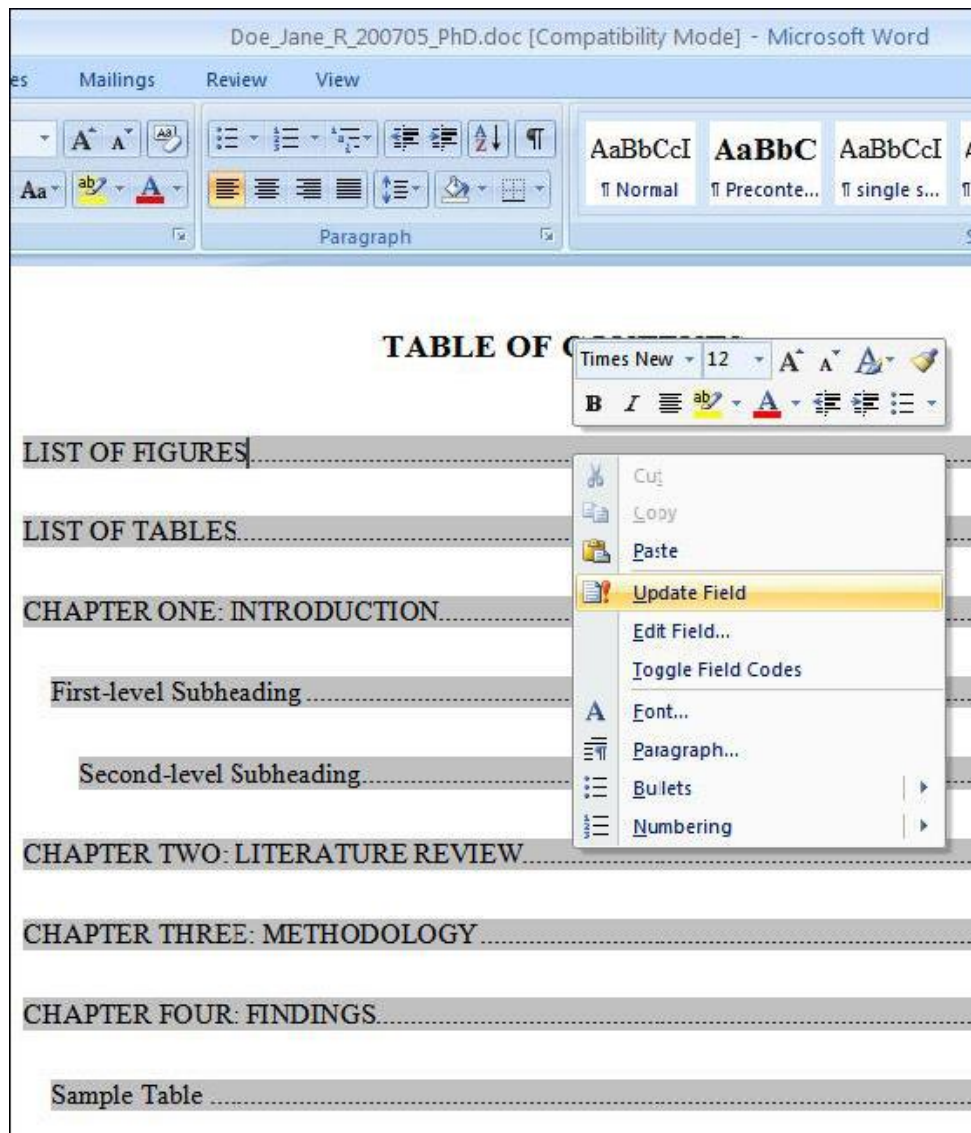
Is it a line that carried over a heading or subheading style from a previous or subsequent heading?

If so, you will need to clear formatting for the line or return the text to a non-heading style. This should eliminate the blank line in the Document Map.

Chapter and Major Heading Bookmarks

First, update your TABLE OF CONTENTS again, to ensure that all of your most recent work is included in the document.

- Right-click on the grey area (within the TABLE OF CONTENTS itself). You will see two small menus popup.



- Choose "Update Field"

Another small menu will pop up:

- Choose "Update entire table" and hit **OK**.

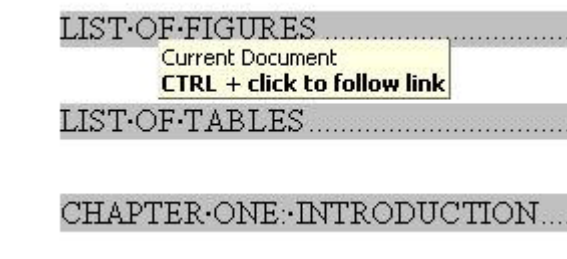
Now evaluate whether all of your major headings appear in the table. Are they all formatted identically?

Subheading Bookmarks

Each level of subheading should have a consistent look throughout the document.

Go through your TABLE OF CONTENTS to be sure that each heading and subheading looks consistent with others of that type. (For example, all Heading 1s should look the same as the rest.)

- While holding down the CTRL key on your keyboard, use your mouse to click on each link. The mouse pointer will turn into a hand with a finger pointing.



- Click on the headings themselves to ensure that each subheading is consistent.

As you look, ask yourself:

1. Did you use title case?
2. Did you put your headings and subheadings in the right hierarchy according to your content? If so, all of your Heading 3s should look the same, regardless of where they are in the paper.
3. Are all of your headings and subheadings consistently spaced (the same amount of space before and after subheadings) and consistently aligned (all Heading 3s center, etc)?


Known Exporting Issues Regarding Bookmarks

A warning: There have been documented problems converting to PDF when using certain software combinations. Occasionally, in the document, you will not be able to click directly on the LIST OF FIGURES or TABLE OF CONTENTS and be brought right to that page. Sometimes some of the links will work and others not, especially if you have created a specialized numbering system for your chapters and captions.

If you do have these problems, call the Faculty Multimedia Center for help. They will usually be able to determine how best to fix the problem if you tell them what software you have been using; it can sometimes mean a trip to campus to use a different type of software to convert. Don't worry; these problems get solved, but they often have little to do with your document itself or your formatting (especially if you've been doing formatting correctly throughout), and more to do with software incompatibility.

Testing Bookmark Links in the PDF

After you have converted, be sure to check your bookmarks

- Open the side pane with the tab marked "Bookmarks" – in Adobe Professional 8, the icon will look like this: 

Look through your bookmarks. Ask yourself these questions:

1. Do all of them go to the correct heading or subheading on the correct page? (Click on the bookmark to be sure.)
2. Do they look the same as they are in the document? ("CHAPTER ONE" in the document is also spelled out "CHAPTER ONE" in the bookmark)
3. Does the hierarchy look the same as in the TABLE OF CONTENTS? (The heading ACKNOWLEDGMENTS cannot collapse the ABSTRACT, TABLE OF CONTENTS, and all of the chapters underneath it, etc) **IF NOT**, see the next link.


Then, go to the TABLE OF CONTENTS. Click on each link on this page. The same things should happen as do for the bookmarks: you are taken to the correct heading on the correct page.

Modifying Bookmarks in the PDF

If your bookmark hierarchy does not reflect your TABLE OF CONTENTS, or you have blank bookmarks, you will need to make changes. If you have extensive changes, go back to the Word document and make adjustments. For more minor changes, you can modify the PDF directly.

Determine what version of Adobe you are using to convert to correctly utilize the Adobe tools.

Adobe Professional 6.0 & Older

To delete blank bookmarks, you should click on the bookmark – it will look like this: . Often, the image will turn grey when you click on it.

- Hit the Delete key on your keyboard. The blank bookmark will disappear from the side pane.
- Do this with any other blank bookmarks that are listed.

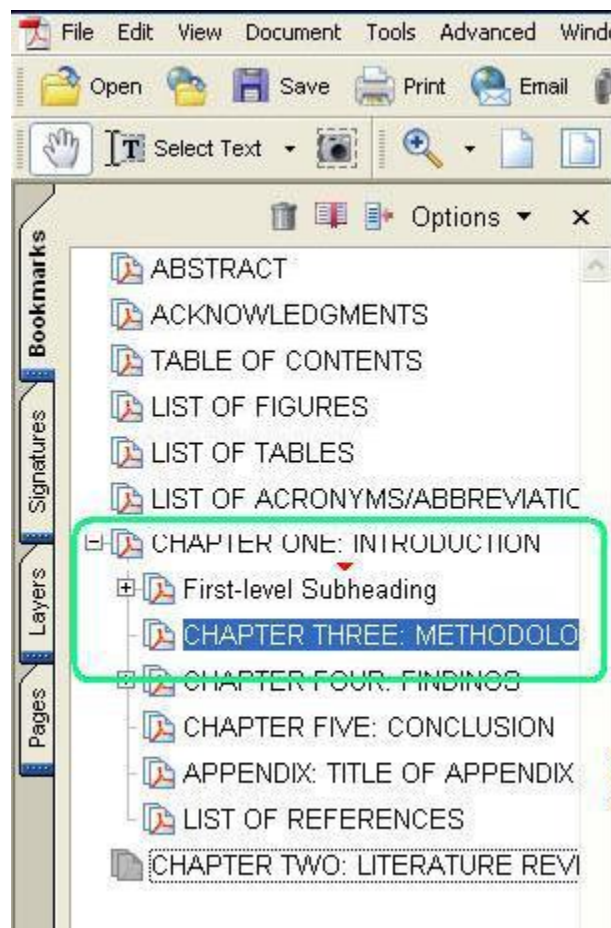
- Now save the changes to the PDF. Click the Save button: .

If you need to do so, rearranging the hierarchy is also easy.

- Click on the bookmark you want to move. (If it also contains subheadings, click on the little plus sign next to the word in order to minimize the whole group.)
- Hold the left mouse button and drag the bookmark upwards in the main hierarchy.

You will see a red down-arrow move with your cursor when you drag the bookmark out of the PDF hierarchy.

- Once you see the red arrow underneath the CHAPTER ONE bookmark, let go of the mouse button.



It will move the heading title to the end of the bookmark list. After moving the main headings, your subheadings will have moved as well. Do this as many times as needed.

It may also be necessary to rearrange the bookmarks after pulling them out of the hierarchy. Follow the same steps (click and drag) in order to rearrange the bookmarks in the correct order.

- Now save the changes to the PDF. Click the Save button: 

If you forget to save, don't worry. When closing the PDF, a dialog box will appear and ask if you want to save the changes. Click **Yes** and it will save.

Adobe Professional 7.0 and Newer

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Often, the image will turn grey when you click on it.

- Hit the Delete key on your keyboard. The blank bookmark will disappear from the side pane.
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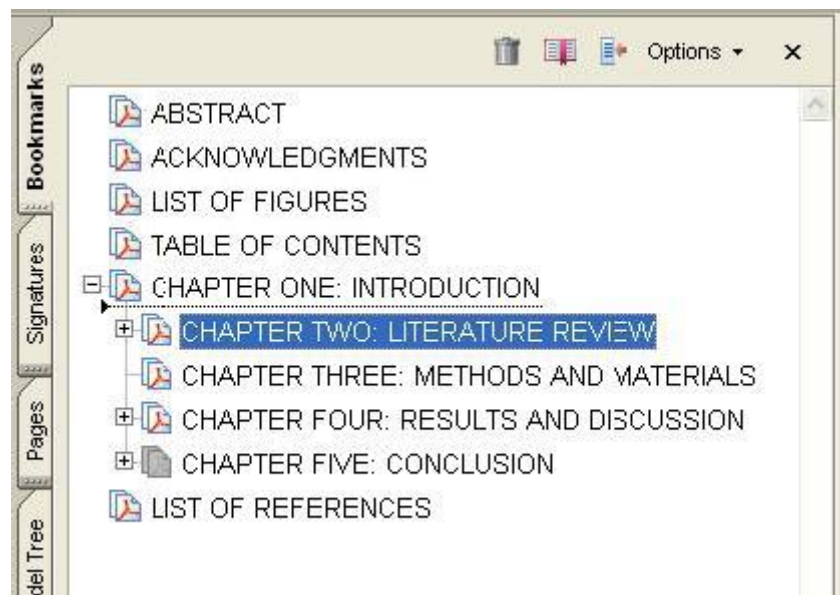
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If you need to do so, rearranging the hierarchy is also easy.

- Click on the bookmark you want to move. (If it also contains subheadings, click on the little plus sign next to the word in order to minimize the whole group.)
- Hold the left mouse button and drag the bookmark upwards in the main hierarchy.

You will see a thin black line with an arrow attached move with your cursor when you drag the bookmark out of the PDF hierarchy.

- Once you see a thin black line with arrow attached underneath the CHAPTER ONE bookmark, let go of the mouse button.



It will move the heading title to the end of the bookmark list. After moving the main headings, your subheadings will have moved as well. Do this as many times as needed.

It may also be necessary to rearrange the bookmarks after pulling them out of the hierarchy. Follow the same steps (click and drag) in order to rearrange the bookmarks in the correct order.

- Now save the changes to the PDF. Click the Save button:



If you forget to save, don't worry. When closing the PDF, a dialog box will appear and ask if you want to save the changes. Click **Yes** and it will save.

You are now ready for
[Step 7: Specialized Numbering Schemes](#)