

How Can Acrobat Help My Bar Association?



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ABA Legal Technology Resource Center

NABE Midyear Meeting 2009

Why PDF (Portable Document Format)?

- Format neutral
 - E.g. word processing, spreadsheet, Web, e-mails, scanned docs....
- Looks the same on every computer
- Don't need native software
 - All you need is free Adobe Reader
- De facto standard for sharing information



Why PDF (Portable Document Format)?

- Store, manage, manipulate and analyze digital information much more effectively and efficiently than paper
- Multi-media PDF documents can be powerful persuaders
- And go paperless

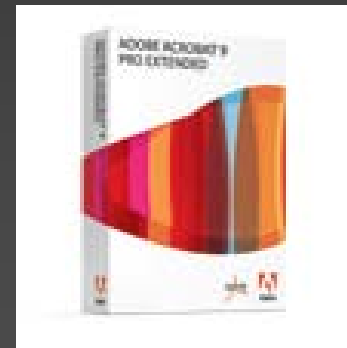
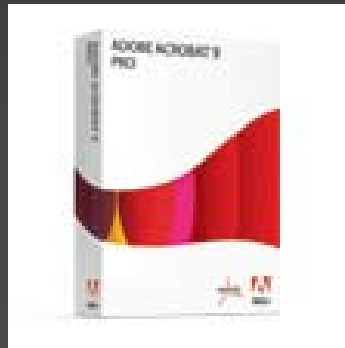


Alternatives to Acrobat

- Bluebeam PDF and Nuance PDF Converter
- Others:
 - NitroPDF
 - CutePDF
 - Pdf995
- Simple conversion: MS Word 2007 addin, WordPerfect, GoogleDocs, etc.
- See www.planetpdf.com for lists of PDF “Creation & Conversion” tools

Adobe Acrobat versions

- Reader 9 - free
- Acrobat 9 Standard - \$299/*\$99
- Acrobat 9 Professional - \$449/*\$159
- Acrobat 9 Pro Extended - \$699/*\$229



* Cost to upgrade from version 6 and above

What's New in Acrobat 9?

- Came out in July 2008
- Highlights for Bar Associations:
 - PDF Portfolios
 - Updates to redaction, compare docs, forms generation, Typewriter tool

What can you do with Acrobat?

- It can't:
 - Be a word processor
 - No document creation or editing
- It can:
 - Mark up, annotate, comment
 - Add interactivity
 - Bookmarks, hyperlinks, sticky notes
 - Add security
 - Redaction, metadata removal
 - File/e-mail retention and destruction



PDF File Types

- Image-only
 - exact duplicate of original
- Image-on-text files
 - image plus text “layer”

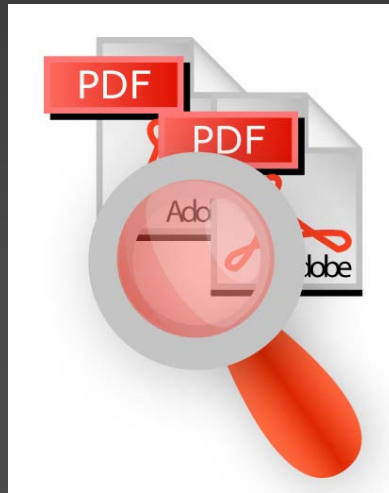


Image-only PDFs

- Digital picture of paper document
 - like a JPEG or TIFF file
- No search functionality
- No copy/paste
- Add annotation with comments (searchable) or graphics



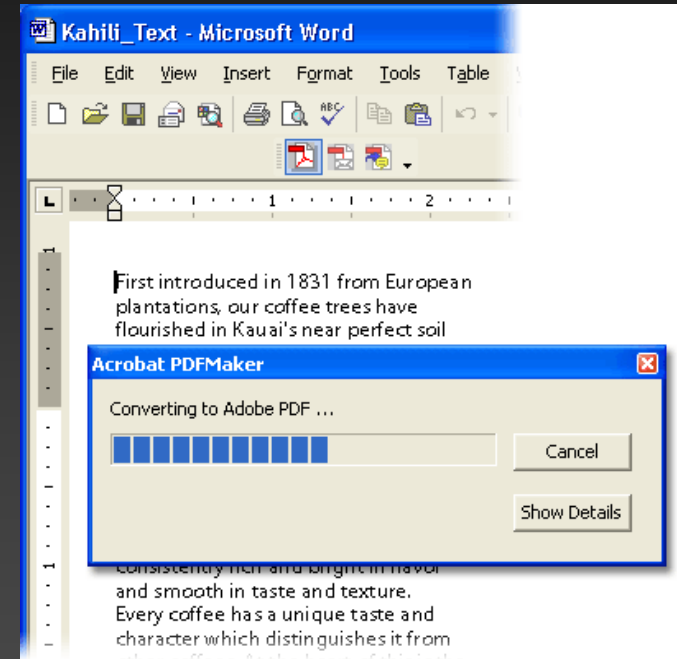
Image-on-text files

- Exact reproduction of
 - printed electronic file or
 - OCR'd scanned document
- Text layer behind the image
- Searchable
- Can copy/paste



Ways to create Image-on-text files

- “Print” to PDF
 - File, Print, select Adobe PDF
- Adobe toolbar buttons
 - MS Office, Outlook, IE, others
- Select file, right click, choose option

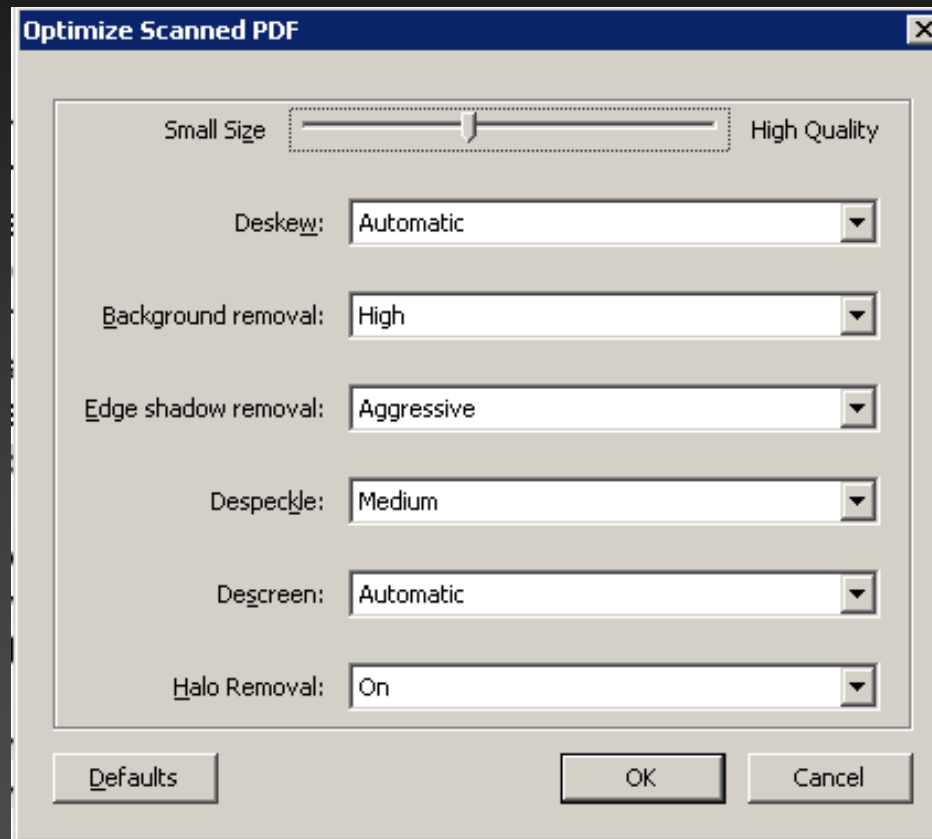


Scan to PDF

- Creates “Image only” PDF
- File sizes can be very large
- To reduce:
 - Try selecting black-and-white
 - Document > Reduce File Size (Acrobat 9)
 - Run OCR

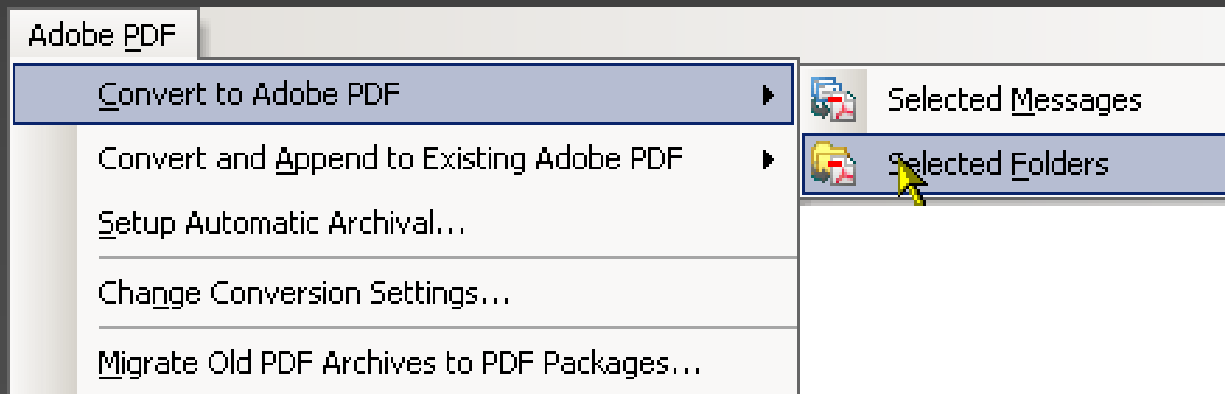


Optimizing Scanned PDF



Email Archive Tool

- In MS Outlook or Lotus Notes:
 - one click converts a single email to PDF, or a folder or multiple folders into PDF portfolio
- Contains e-mail text, as well as any attachments in their original format
- Makes closed project cleanup a snap (archive, store with other file data; destroy when appropriate)



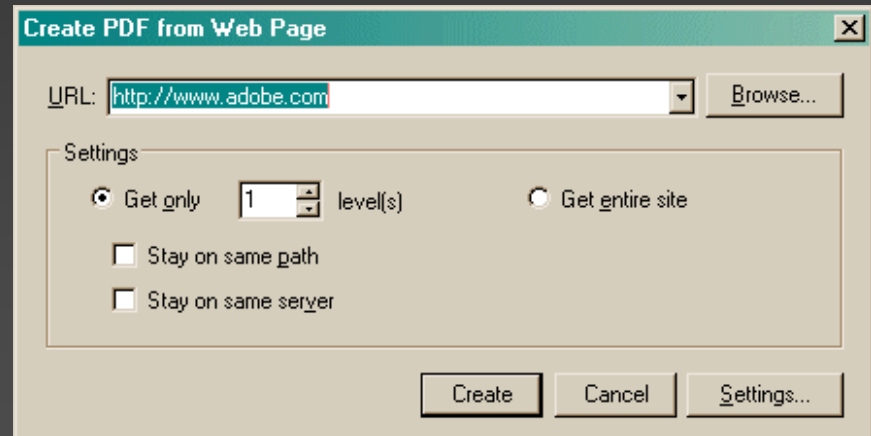
Converting Web Pages

- Store web pages offline
- Good for text intensive pages (articles)
- Two ways to convert:
 - Print to PDF
 - File is smaller, no hyperlinks
 - Convert with the PDF toolbar
 - Only in Internet Explorer
 - Keeps hyperlinks
 - Interactive websites don't convert well



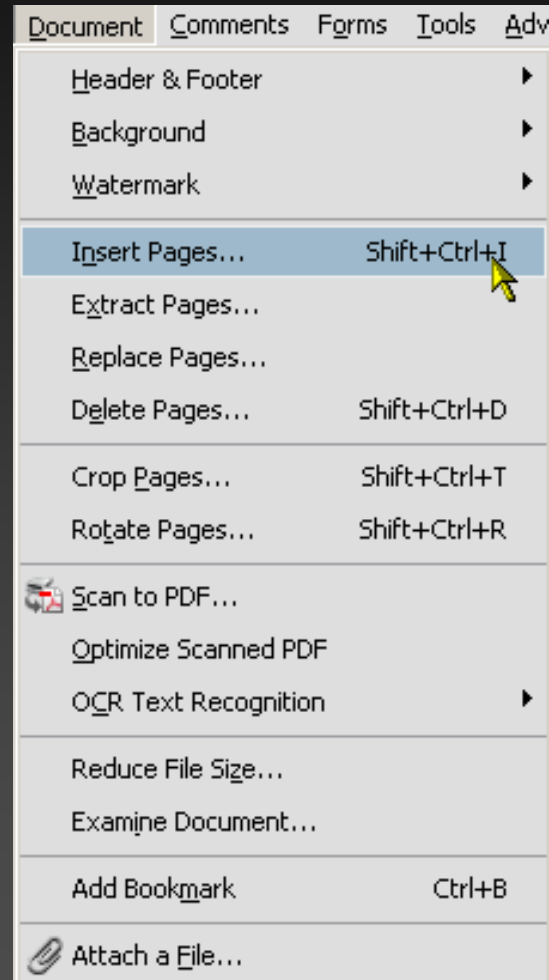
Convert a Website to PDF

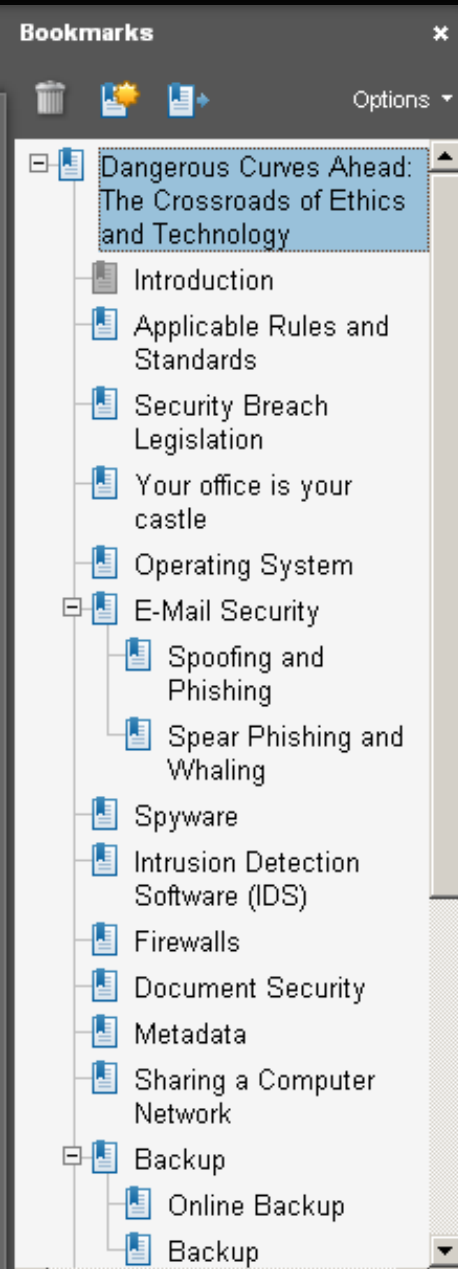
- Create PDF from Web Page dialog box appears
- File – Create PDF – From Webpage
 - Use copy and paste to transfer URL
- Other options
 - Number of levels to convert
 - Stay on same server
 - Select an entire site
 - Be careful!



Working With Pages

- Insert pages
- Delete pages
- Extract pages
- Replace pages
- Rotate page(s)
- Crop pages





Bookmarks

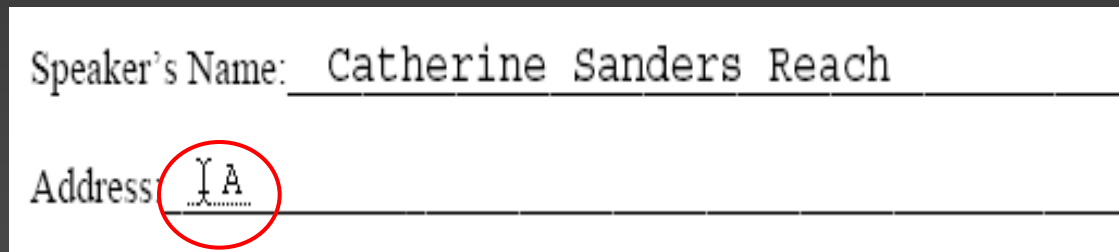
- PDF navigation/table of contents
- Essential for long documents
- Make image-only PDF far more useful
- Automatically generated from MS Word styles
- Examples: [eBooks](#), agenda binders

Links


- PDF links are hyperlinks
- Jump to:
 - a specific page in the current document
 - a specific page in another document
 - a Web site
 - another file type (audio or video)
- How to create links
 - Link tool
 - Automatically recognizes in electronic documents

Acrobat Typewriter Tool for Filling Forms

- Non-fillable PDF form? No Problem!
 - Acrobat 9
 - ➔ Tools
 - ➔ Typewriter



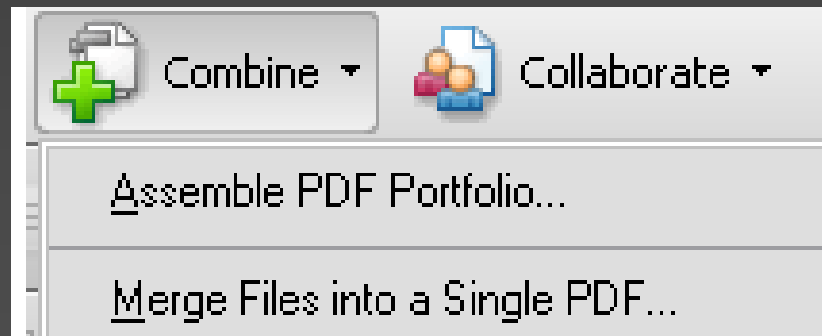
Speaker's Name: Catherine Sanders Reach

Address: 

The image shows a white rectangular area representing a PDF form. The top line contains the text "Speaker's Name: Catherine Sanders Reach". The bottom line contains the text "Address:" followed by a typewriter tool cursor icon, which is a vertical line with a small 'A' and a horizontal line below it. This cursor icon is circled in red.

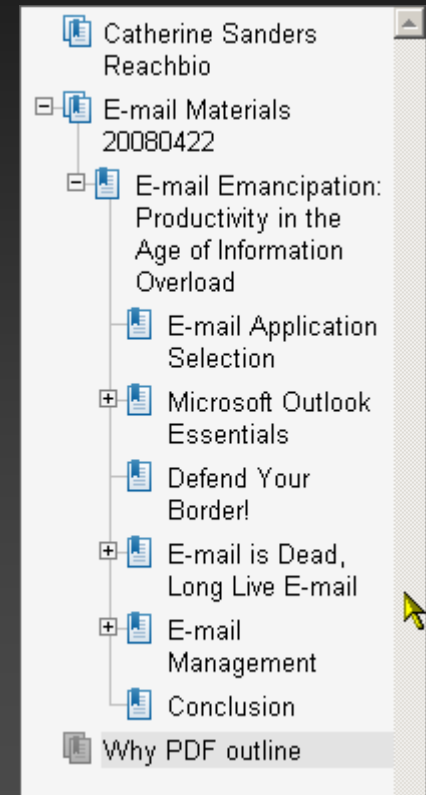
Combining Files and PDF Portfolios

- Advantages to saving multiple files to a single PDF document or a PDF portfolio
- Puts all information in one document
 - E.g. conference materials, speaker forms...
- Provides all the features and functions of a PDF document
 - searchable, links, bookmarks, comments, etc.



Creating a PDF from Multiple Files

- Combine – Merge files into single PDF
- Can combine files of many file types
 - Can add specific pages of certain documents
- Place in the order that you want
- Convert to create a single PDF file




Creating a PDF from Multiple Files

The image shows a software interface with a sidebar on the left and a main content area on the right. The sidebar is titled "Bookmarks" and contains a list of files and folders. The main content area displays a meeting agenda for SCOTIS Midyear 2009.

Bookmarks:

- SCOTIS Agenda 2-13-09
- SCOTIS Members and Liaisons
- Minutes from Nov. 2008 meeting
- Nomination Guidelines for FY10 SCOTIS appointments
- Legally Minded update
- Current Member Focused Projects
- Update on Email and Communications
 - ABA Email Whitepaper
 - ABA Maestro Usage FY09
- Technology Assessment
 - Memo from Hank White
 - SCOTIS assistance for ABA Strategic Technology Plan
 - Financial Systems - Tech Assessment
- LTRC Report
 - LTRC activities Nov 2008 - Feb 2009
 - Assistance for Special Committee on Disaster Response

Main Content Area:



SCOTIS Midyear 2009 Meeting Agenda

**February 13, 2009
1-4 PM EST**

**Sheraton Boston
Conference Room 6, 5th Level**

NABE Midyear Meeting 2009

Creating PDF Portfolios

- Combine – Create PDF Portfolio
- Benefits of PDF portfolios
 - an “envelope” that can hold PDFs and other types of documents
 - offers multiple views which may be sorted and customized
 - can add full-text indexes for fast searching
 - easy to disassemble, remove and add documents
 - individual documents within the portfolio retain their individual security status
 - Add logos, welcome screens, and customization galore
- Check out the following example...

WI Solo/Small Firm Conference Materials delivered on a thumb drive and created by assembling a PDF portfolio

SOLO & SMALL FIRM Wisconsin Conference

October 23-25, 2008
Kalahai Resort
Wisconsin Dells, WI

This USB Flashdrive contains conference materials available as of October 14, 2008. Please check the download page for the latest materials. The link to this page was previously sent to you by email .

To locate session materials, select one of the Track Folders and then select from the list of sessions which are identified by session number, name and description.

On behalf of the the 2008 Wisconsin Solo & Small Firm Conference Planning Committee and staff of the Milwaukee Bar Association and the State Bar of Wisconsin please accept our thanks for your attendance and your support of this event.

This USB Flashdrive is provided courtesy of the State Bar of Wisconsin Bank of America Credit Card Program. www.wisbar.org/creditcard

Don't show Welcome Page again

NABE Midyear Meeting 2009

WI Solo/Small Firm Conference Materials delivered on a thumb drive and created by assembling a PDF portfolio



NABE Midyear Meeting 2009

WI Solo/Small Firm Conference Materials delivered on a thumb drive and created by assembling a PDF portfolio



October 23-25, 2008
Kalahai Resort
Wisconsin Dells, WI

Home / Practice Management Track /

11 Items



PRACTICE
MGMT_Session 1....pdf



PRACTICE
MGMT_Session 1....pdf

Practice Killers: Six Things
That Can Kill Your Practice...



PRACTICE
MGMT_Session....pdf

People, Pitfalls and the
Practice of HR...



PRACTICE
MGMT_Session....pdf

People, Pitfalls and the
Practice of HR...



PRACTICE
MGMT_Session....pdf

Getting Paid: Programs and
Procedures for Accurately...



PRACTICE
MGMT_Session....pdf

Hanging Your Shingle: A
Practical Approach to Starti...



PRACTICE
MGMT_Session 5....pdf

Hanging Your Shingle: A
Practical Approach to Starti...



PRACTICE
MGMT_Session....pdf

What's Your Plan? The
Framework for Developing ...



PRACTICE
MGMT_Session....pdf

Managing Growth: What You
Should Know Before Addin...



PRACTICE
MGMT_Session....pdf

Avoiding the "M" Word:
Managing Malpractice Risks...



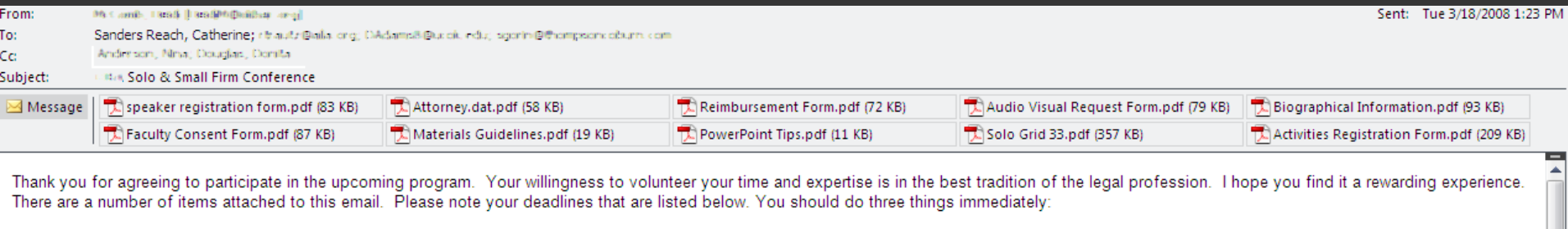
PRACTICE
MGMT_Session....pdf

Managing the Books:
Preventing Theft or ...

NABE Midyear Meeting 2009

With Combine Files and Portfolios

You'll never have to do this again



NABE Midyear Meeting 2009

Removing Metadata

- Removes native document metadata
 - E.g. tracked changes, document versions, notes, comments, formulas and other embedded text
- Examine Document highlights and removes PDF metadata
 - E.g. document properties, comments and other reviewing functions

Creating Security Policies

The screenshot shows a window titled "Managing Security Policies" with a toolbar containing "New", "Copy", "View", "Edit", "Delete", and "Favorite" buttons. A "Show" dropdown menu is set to "All Policies". Below the toolbar is a table listing policies:

Name	Description	Last Edited
★ ClientShare	For documents shared with clients	1/22/2009 3:51:46 PM
★ Encrypt with Certificate	This policy will allow you to require access to a ...	<not available>
★ Encrypt with Password	This policy will allow you to set an open or modi...	<not available>

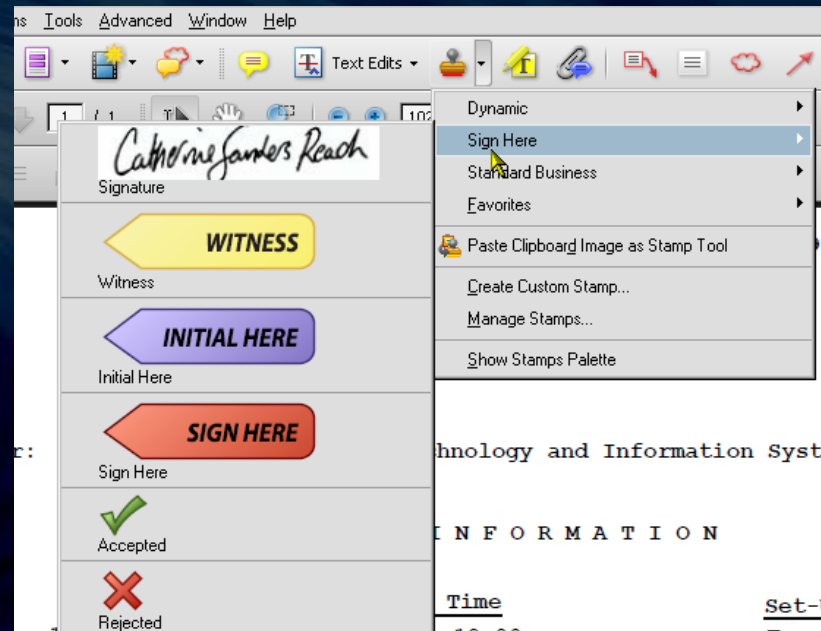
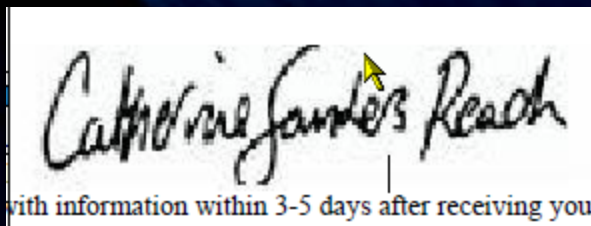
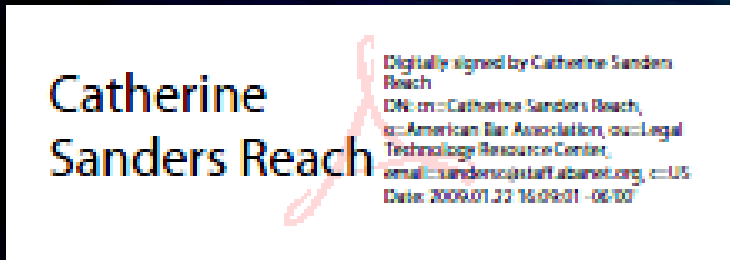
Below the table is a "Policy Details" section for the selected "ClientShare" policy:

Security Method: Password Security
Name: ClientShare
Description: For documents shared with clients
Encrypted Components: All document content
Type: User
Modification Date: 1/22/2009 3:51:46 PM
User Password: Not Required
Owner Password: Required
Changes: Any except extracting pages
Copying: Not Allowed
Printing: Low Resolution (150 dpi)
Accessible: Allowed

At the bottom of the window are buttons for "Help", "Apply to Document", and "Close".

Digital and Electronic Signatures

- Authenticated digital signatures
- Custom stamp with scanned signature

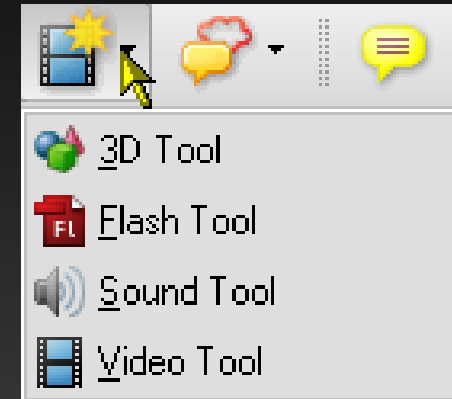


PDF/A

- PDF/A
 - ISO Archival standard
 - Embeds fonts
 - Removes external links
- Good long term storage of primarily text documents

Make your document interactive

- **Add**
 - **Flash, 3D, Videos, Sound**
- **Also**
 - **Clip a file to a document**



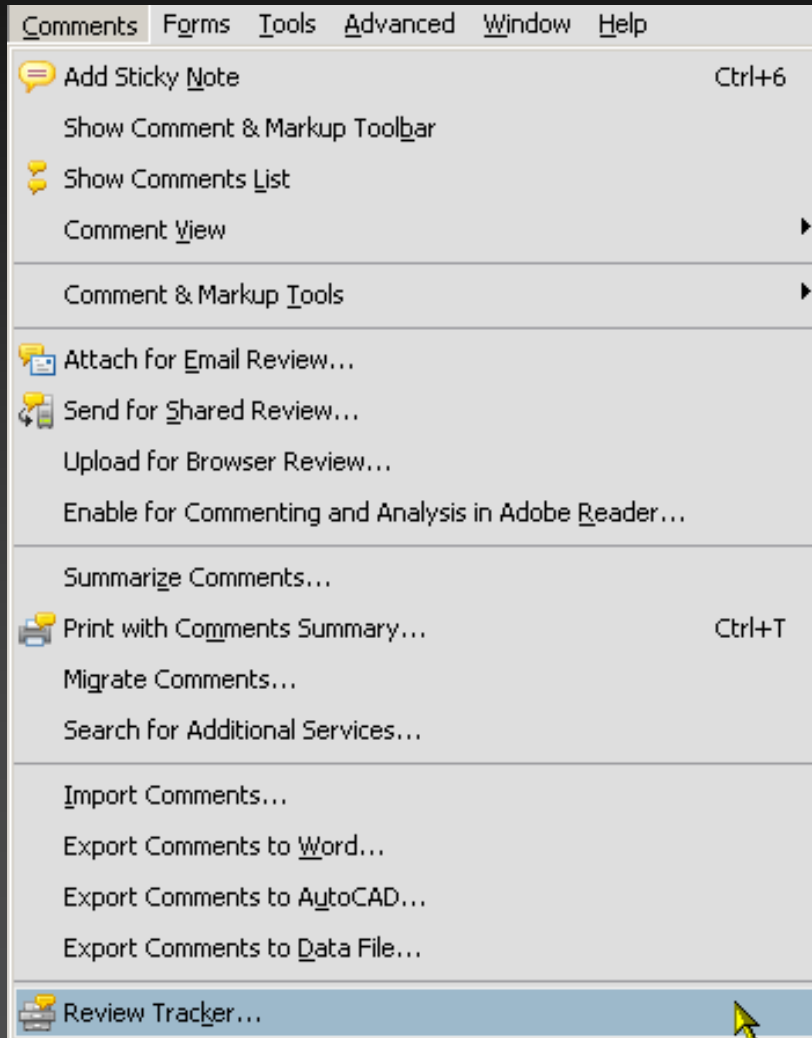
Forms

- Creates fillable forms
 - Will identify form fields automatically
- Forms can be very useful for clients and staff
 - E.g. client intake forms, checklists
- Click attachment in the email and Acrobat merges the data from each returned form
 - Shows not only the filled form, but also parsing the data so that it can be viewed separately from the form.
 - the data collected can then easily be exported to a spreadsheet

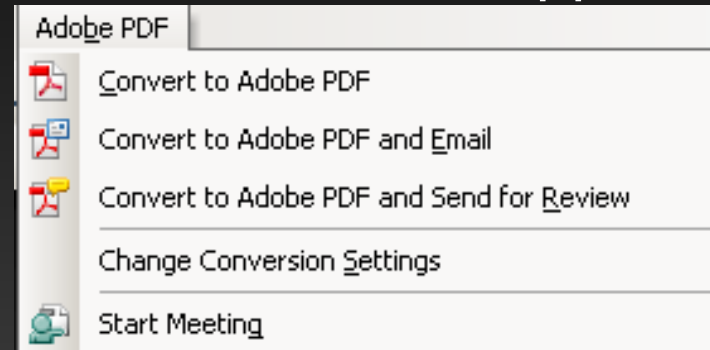
Send for Review and Comment

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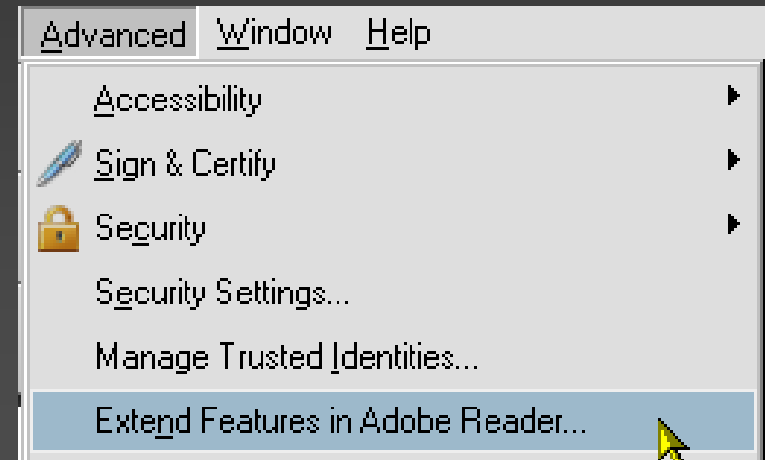
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From MS Office Apps



Enable for Reader



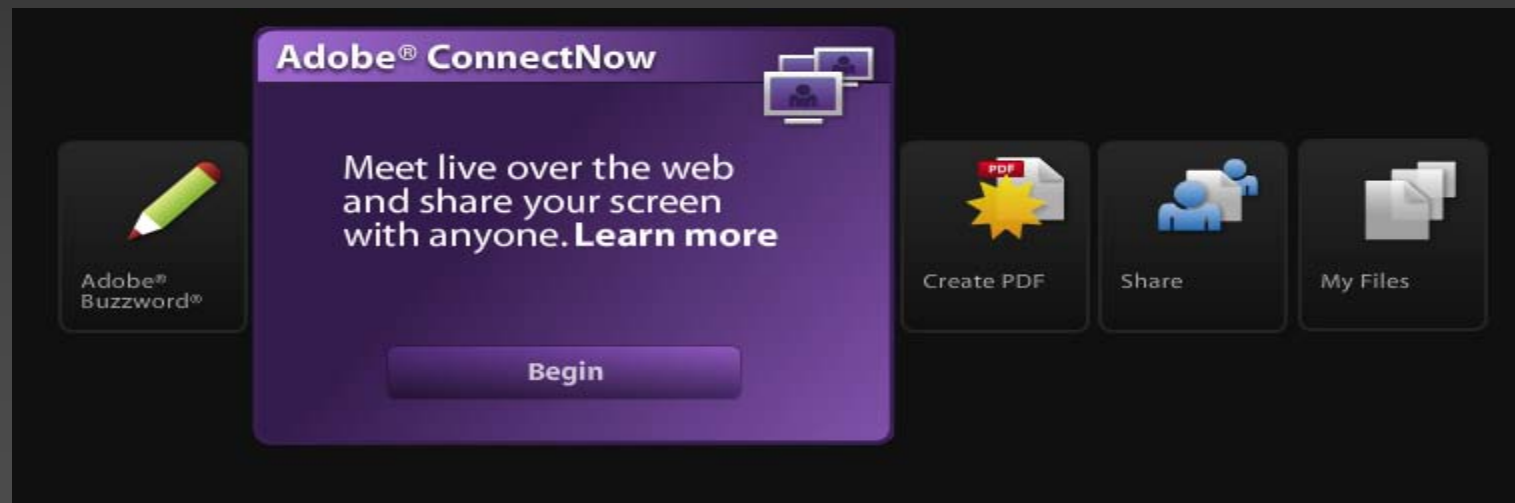
Batch Processing

- Run a command on multiple documents
- Predefined batch processes include
 - OCR, Print All, and Save All as RTF
- Create custom batch processing sequences
 - Advanced > Document Processing > Batch Processing (Acrobat 9)



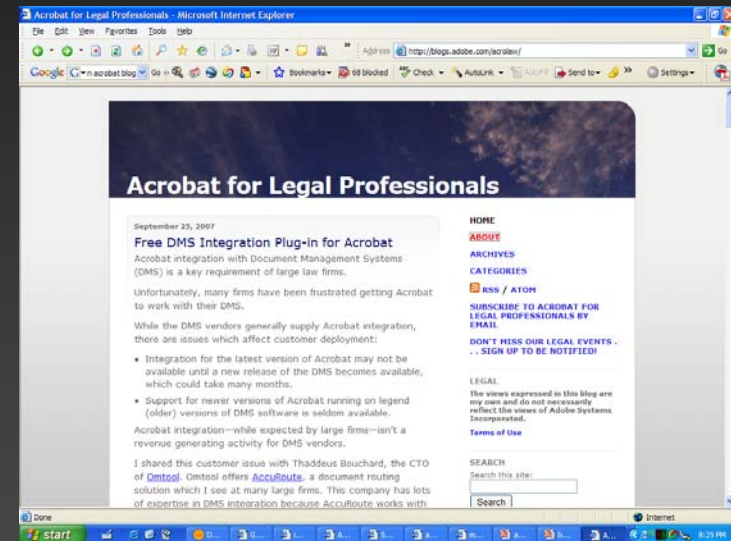
Acrobat.com

- Buzzword online word processor
- Acrobat ConnectNow (free for 3 people)
- Convert 5 files to PDF for free
- File storage
- And more...



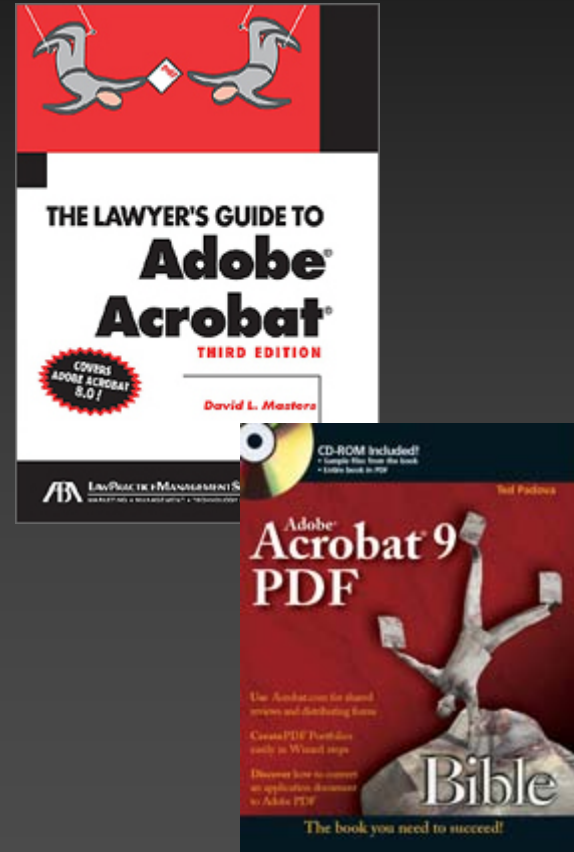
PDF resources

- Acrobat Legal white paper demos and more
 - www.adobe.com/legal
- Acrobat for Legal Professionals blog
 - Rick Borstein
 - <http://blogs.adobe.com/acrolaw/>



PDF resources

- Lawyer's Guide to Adobe Acrobat
 - www.abanet.org
- Acrobat Bible
 - Ted Padova
 - <http://www.west.net/~ted/>



Thanks!!!

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<http://www.lawtechnology.org>