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
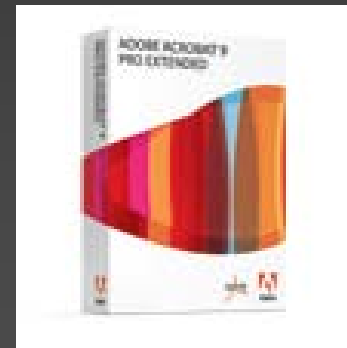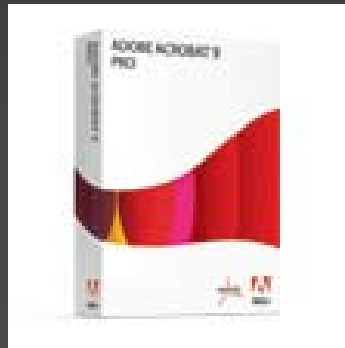
* Cost to upgrade from version 6 and above

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
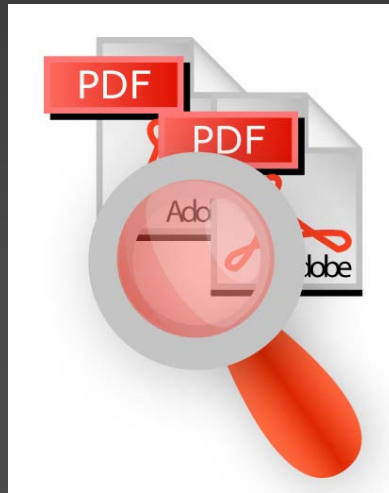 - image plus text "layer"

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
  - OCRed 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
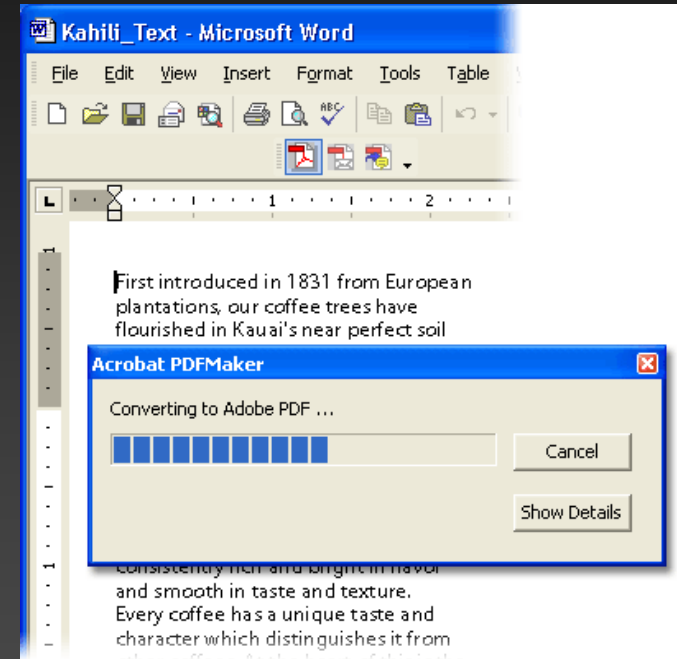
Scan to PDF

- 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
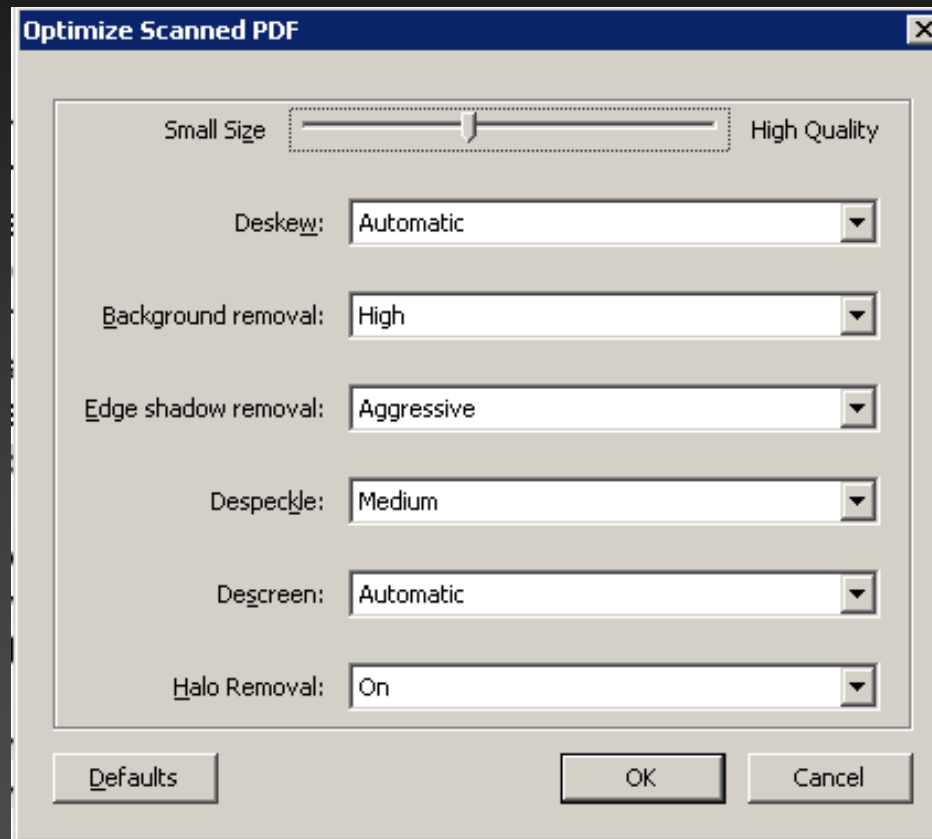
Email Archive Tool

- 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)

Adobe PDF		
Convert to Adobe PDF ▶		Selected Messages
Convert and Append to Existing Adobe PDF ▶		Selected Folders
Setup Automatic Archival…		
Change Conversion Settings…		
Migrate Old PDF Archives to PDF Packages…		
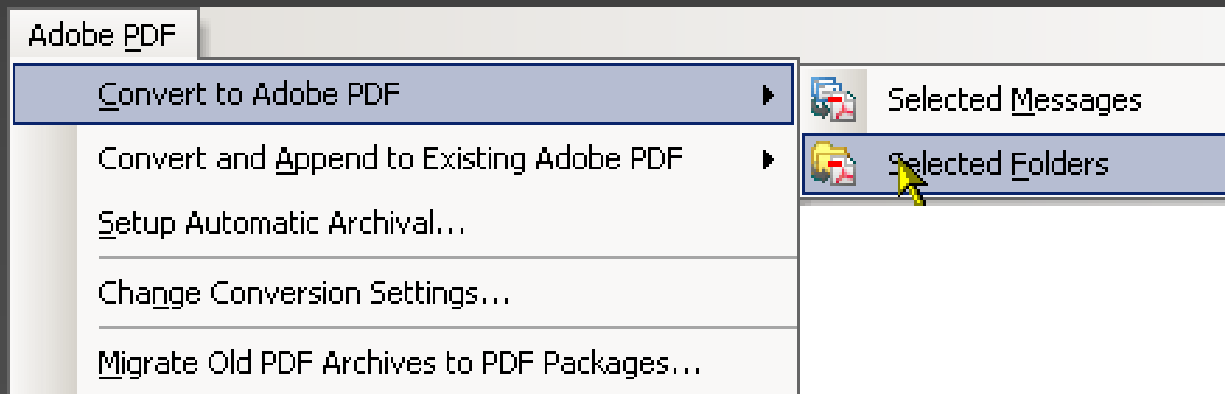
Converting Web Pages

- 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!

Create PDF from Web Page dialog box:
URL: http://www.adobe.com
Settings
- Get only [1] level(s)   Get entire site
- Stay on same path
- Stay on same server
Create   Cancel   Settings...
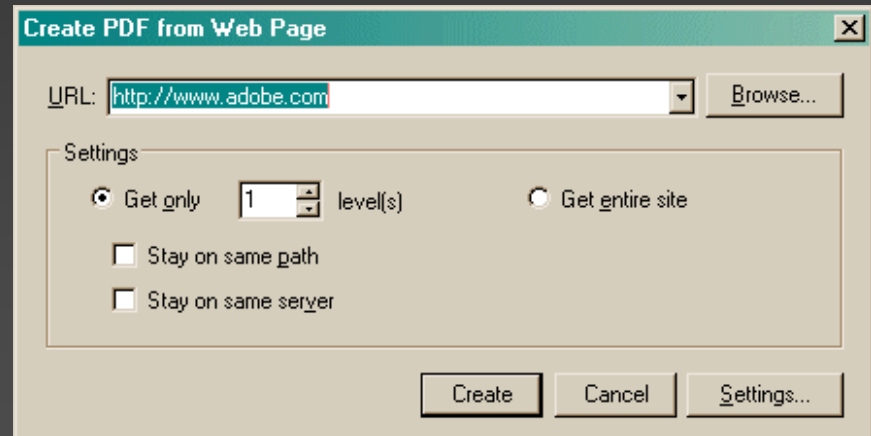
Working With Pages

- Insert pages
- Delete pages
- Extract pages
- Replace pages
- Rotate page(s)
- Crop pages
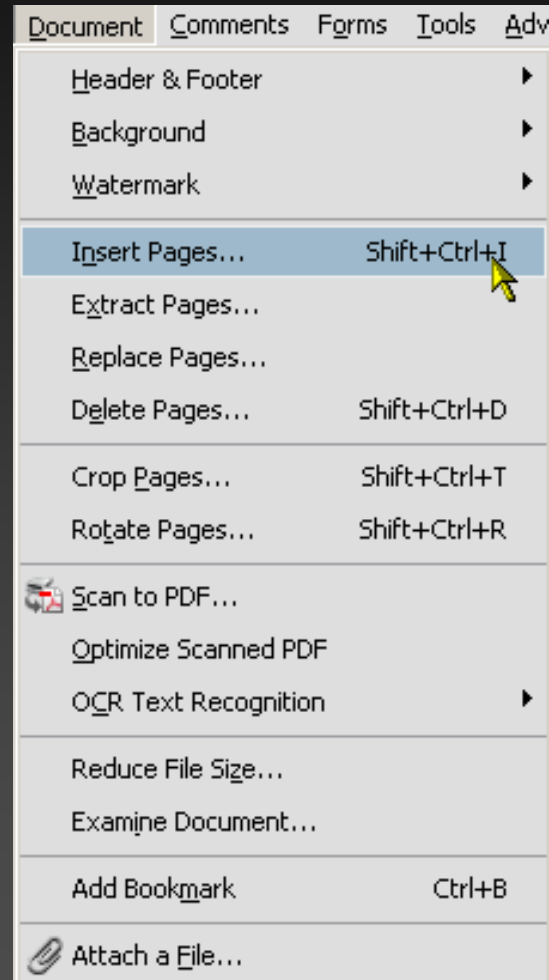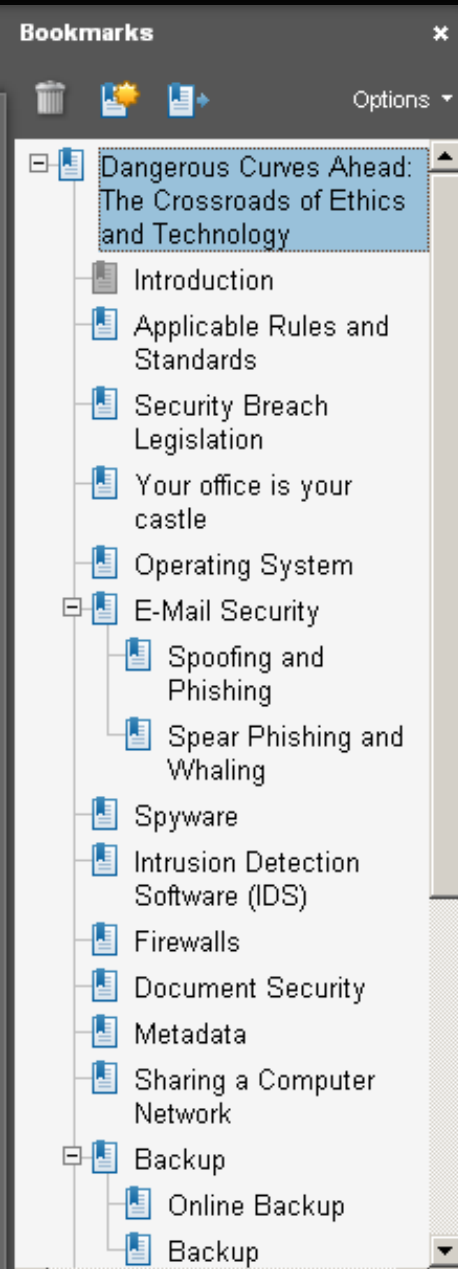
Bookmarks
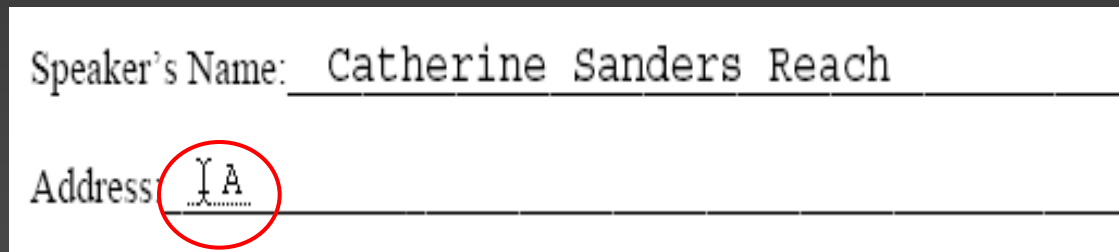
- PDF navigation/table of contents
- Essential for long documents
- Make image-only PDF far more useful
- Automatically generated from MS Word styles
- Examples: eBooks, agenda binders

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

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Address: I A

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.
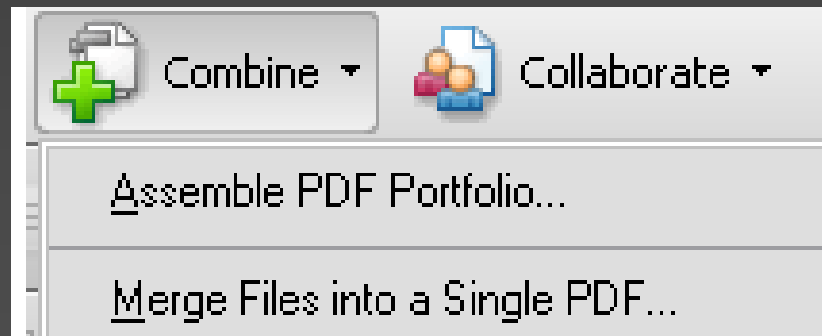
Creating a PDF from Multiple Files

- 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

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

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

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

With Combine Files and Portfolios

You'll never have to do this again

From:	Mc amb... Ceal... [...MH@elbo...org]		Sent: Tue 3/18/2008 1:23 PM
To:	Sanders Reach, Catherine; rchauts@aiia.org; DAdams8@tu.ok.edu; sgonn@thompsoncoburn.com		
Cc:	Anderson, Nina; Douglas, Donita		
Subject:	...s: Solo & Small Firm Conference		

✉ Message	📄 speaker registration form.pdf (83 KB)	📄 Attorney.dat.pdf (58 KB)	📄 Reimbursement Form.pdf (72 KB)	📄 Audio Visual Request Form.pdf (79 KB)	📄 Biographical Information.pdf (93 KB)
	📄 Faculty Consent Form.pdf (87 KB)	📄 Materials Guidelines.pdf (19 KB)	📄 PowerPoint Tips.pdf (11 KB)	📄 Solo Grid 33.pdf (357 KB)	📄 Activities Registration Form.pdf (209 KB)

Thank you for agreeing to participate in the upcoming program. Your willingness to volunteer your time and expertise is in the best tradition of the legal profession. I hope you find it a rewarding experience. There are a number of items attached to this email. Please note your deadlines that are listed below. You should do three things immediately:

NABE Midyear Meeting 2009

Removing Metadata

- Removes native document metadata
  - E.g. tracked changed, 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

Digital and Electronic Signatures

- **Authenticated digital signatures**
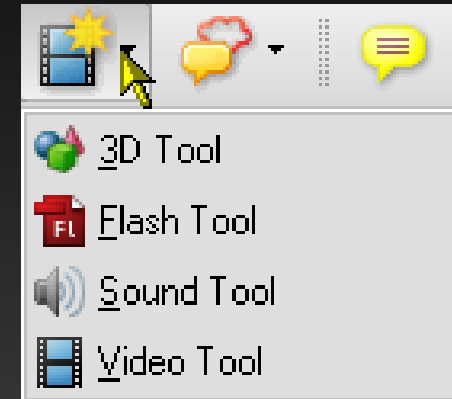- **Custom stamp with scanned signature**
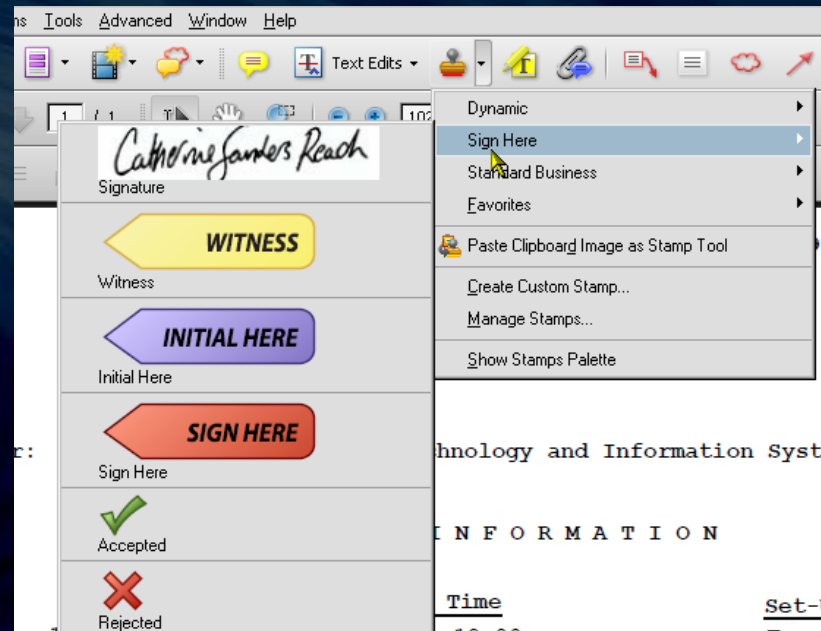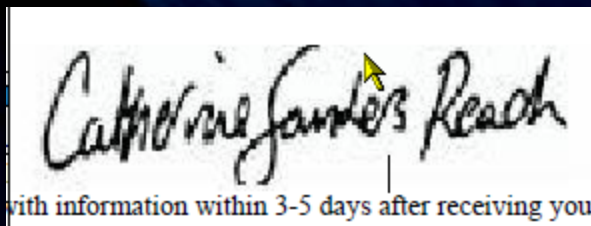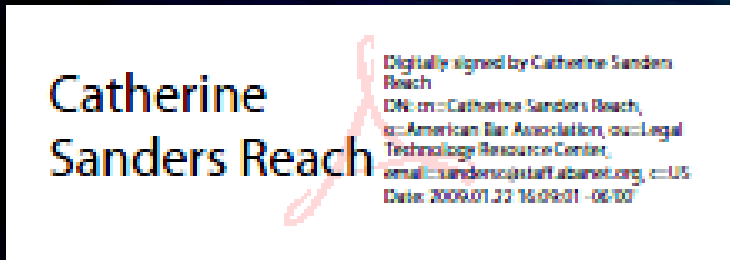
PDF/A

- 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

Click the page with the Attach a File as a Comment tool to pin a file attachment to that place on the page

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.
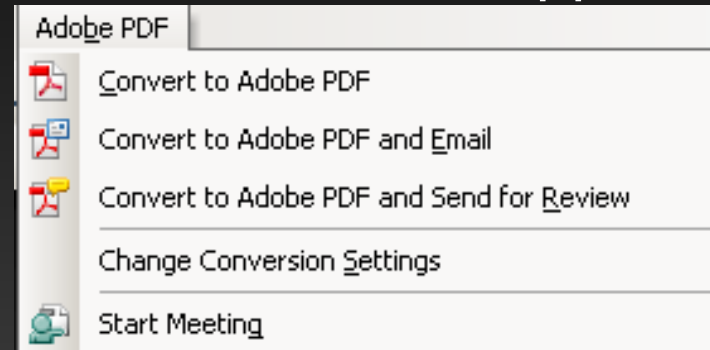 - the data collected can then easily be exported to a spreadsheet
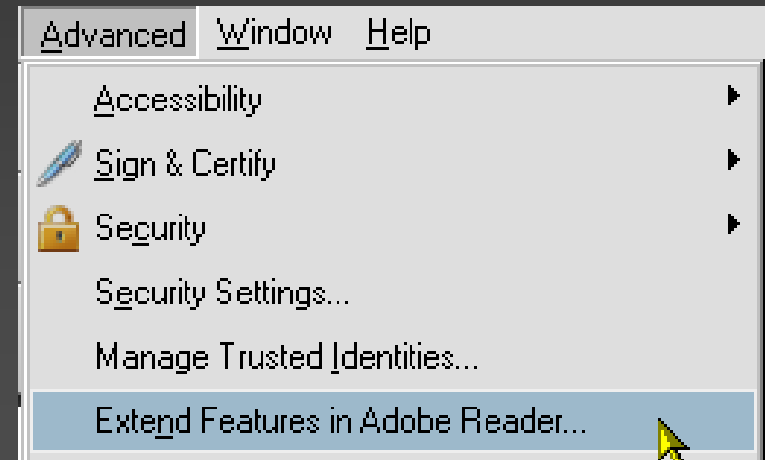
Send for Review and Comment

From Acrobat
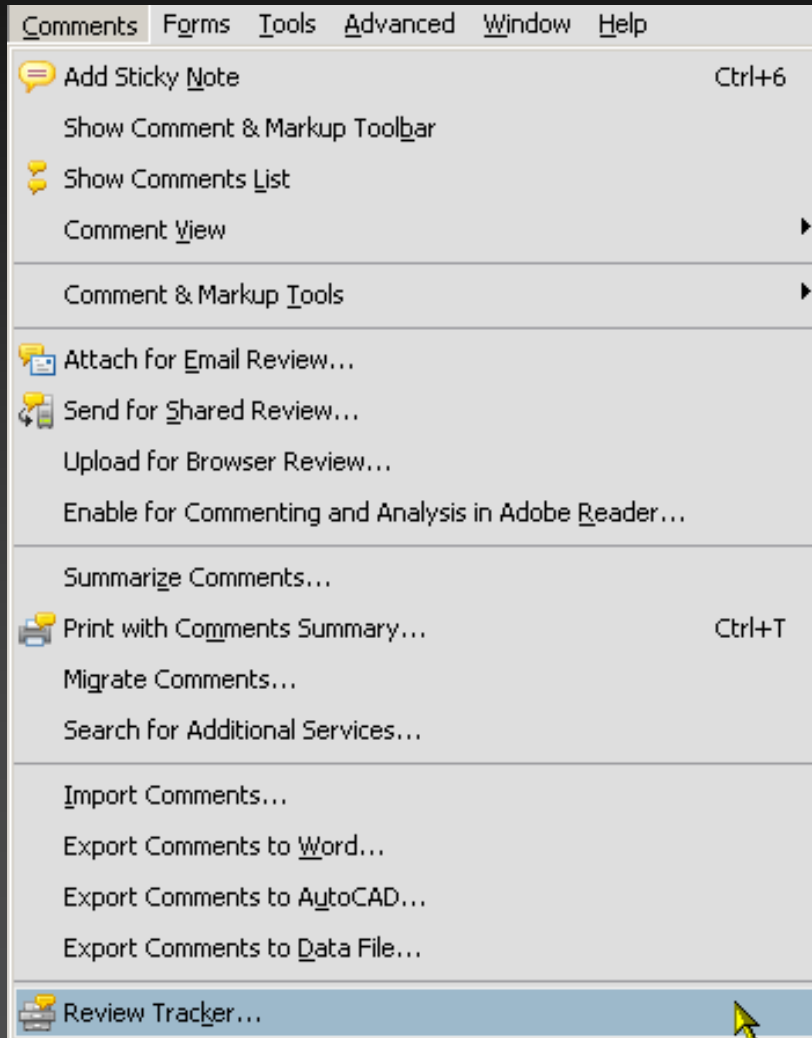
From MS Office Apps

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
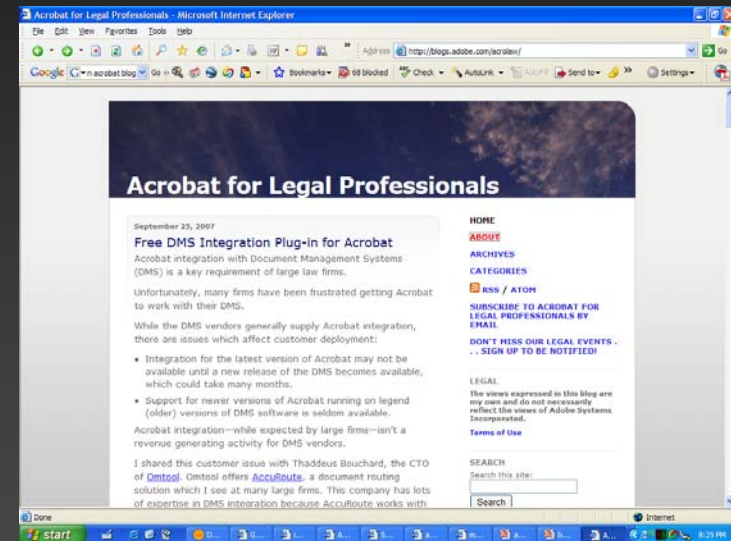 - Advanced > Document Processing > Batch Processing (Acrobat 9)

Acrobat.com

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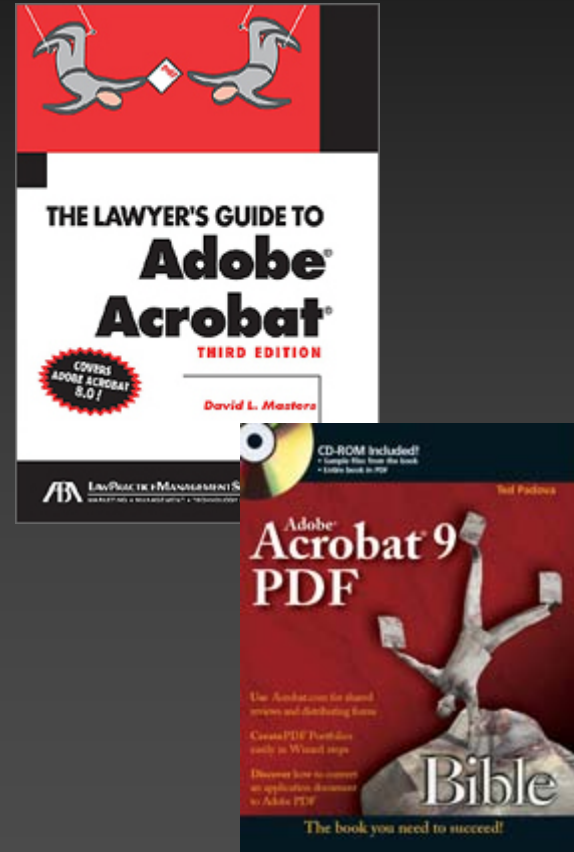- Convert 5 files to PDF for free
- File storage
- And more…
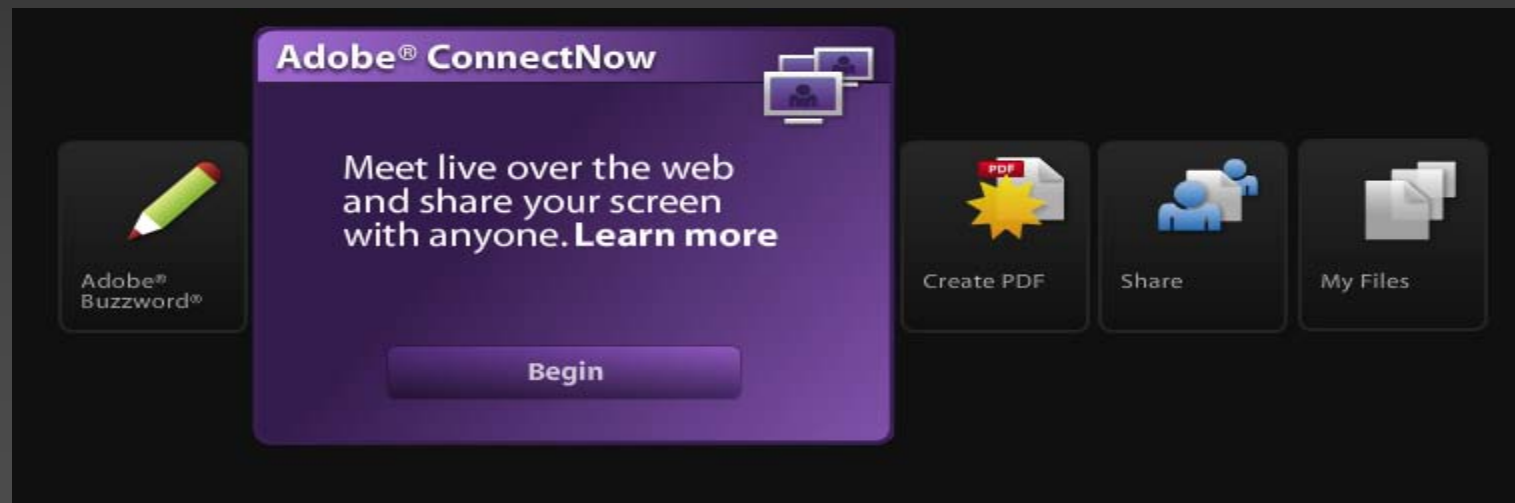
PDF resources

- 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