



PDF Your Practice!

2004 Midwest Law & Technology Conference

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American Bar Association

Legal Technology Resource Center

ABA Legal Technology Resource Center

Why PDF?

- “Portable Document Format”
- Platform independent
- Freely available Adobe Reader
- Easy to read, print, and exchange
- Difficult to edit
- Image-on-text or image only
- Practically anything can be converted to PDF
 - documents, images, spreadsheets, presentation files – and retain formatting, look and feel

Tools and Equipment

- Scanner
- Computer (Mac or PC)
- Software:
 - Adobe Acrobat Standard or Professional
 - OpenOffice (open source)
 - GoBCL (web-based)
- Plugins
 - Bates stamp and redaction

Shopping

- For less expensive options and plugins:
 - PDFZone.com
 - PlanetPDF.com
 - PDFstore.com
- PDF For Lawyers (Blog)
 - <http://www.pdfforallawyers.com>
- Appligent (Bates stamp and redaction plugins)
 - <http://www.appligent.com>
- [IntelliPDF BATES](#)

PDF and Security

- Digital signatures
 - Built in or third party
 - Recipient will need certificate to validate
 - Can use personalized stamp instead



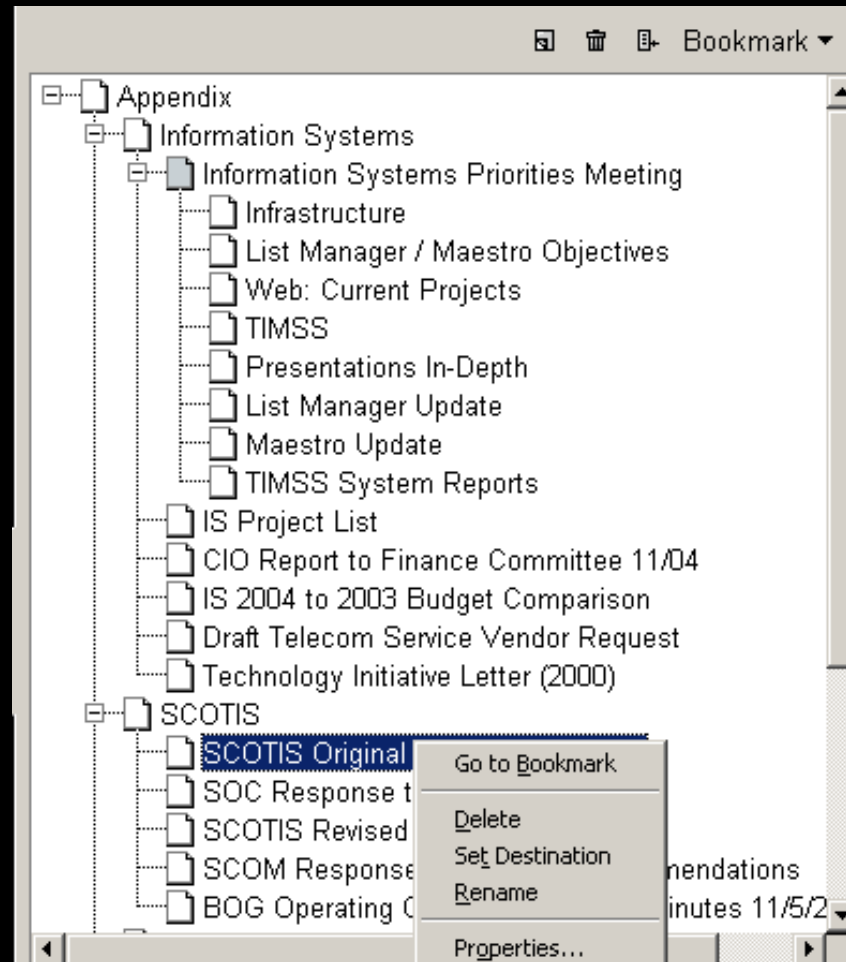
Securing a PDF

- Many options
 - No comments
 - No printing
 - No copying
- Must password protect document or options can be changed!

PDF Tricks - Bookmarks

- Bookmarks
 - Create manually or automatically from MS Word styles
 - Bookmarks are independent of page order
 - Can be nested to have sub-categories
 - Open options can be set to have bookmarks visible
 - Very useful for large documents

PDF Tricks - Bookmarks



PDF Tricks - Comments

- Comments
 - Add notes, stamps, sounds, even files
 - Many color options and icons
 - Comments can be summarized and printed, or viewed in tab column
 - Useful for collaborating without actually changing text or collaborating with scanned documents or images
 - Also drawing tools, highlighters, and more for annotating

PDF Tricks - Comments

Anatomy Of Trial Technology

Trial technologies are all the buzz for legal technologists, early adopters, vendors, and consultants - but have they made it to the main stream practice of law? This article traces availability and use of trial preparation and presentation software, court technology, and more through the most recent ABA Legal Technology Survey Report volume on Courtroom and Litigation Technology. This article first appeared in Law Journal Newsletters' Legal Tech Newsletter, August 2004.

Catherine Sanders Reach, MLIS

It would seem these days that, with the proper technology, a case could go from start to finish without ever generating a piece of paper. What little paper exists is scanned in, annotated, organized, searched, retrieved and stored electronically, along with e-mail, word processing

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Testing, 1,2,3

the proper technology, a case could go from start to finish
per. What little paper exists is scanned in, annotated,
stored electronically, along with e-mail, word processing
her digital data. Trial preparation includes EDD, online
on. Briefs, motions, filings, and documents are all delivered
e are generated graphically, shown to jurors
nd a 6-foot screen. Documents are displayed the same
gal annotating, highlighting, and emphasizing on-screen.
the globe, testifying over live satellite links. CGI enhanced
liven jurors. No attorney would dare be seen lugging boxes
s this reality or still just a technology dream (or nightmare)?

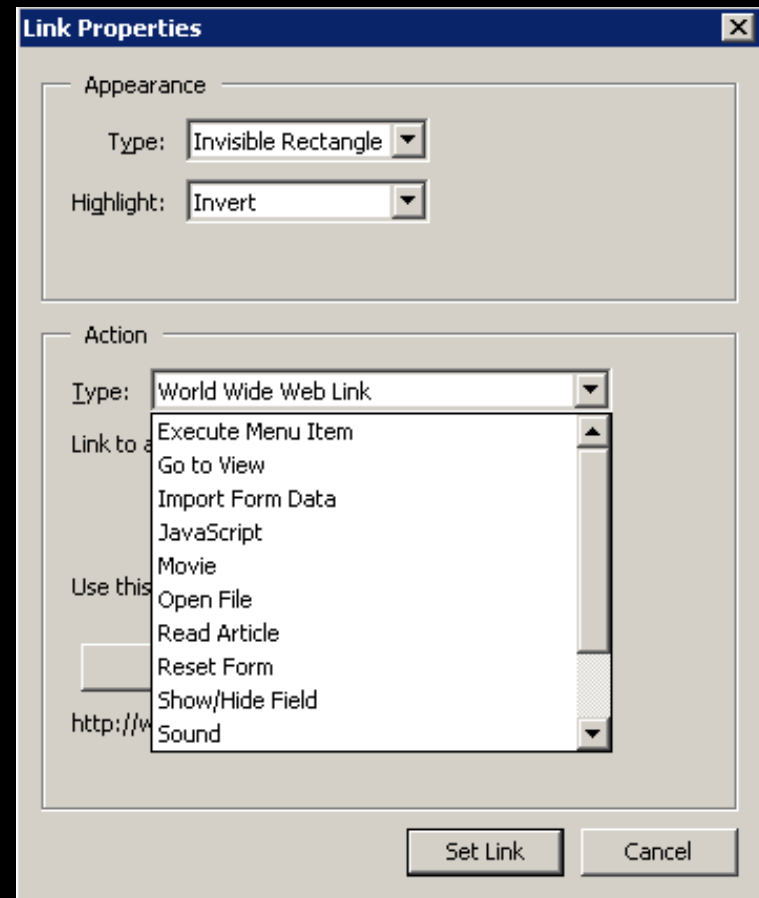
ociation's Legal Technology Resource Center completed its
in five parts. The Litigation and Courtroom Technology
volume serves as a sobering background for those who crave a total technology trial. Firms are

Comments

- Page 1
 - Testing, 1,2,3
- Page 2
 -

PDF Tricks - Links

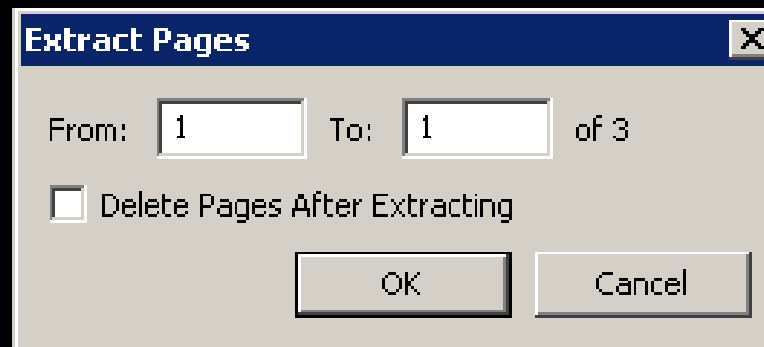
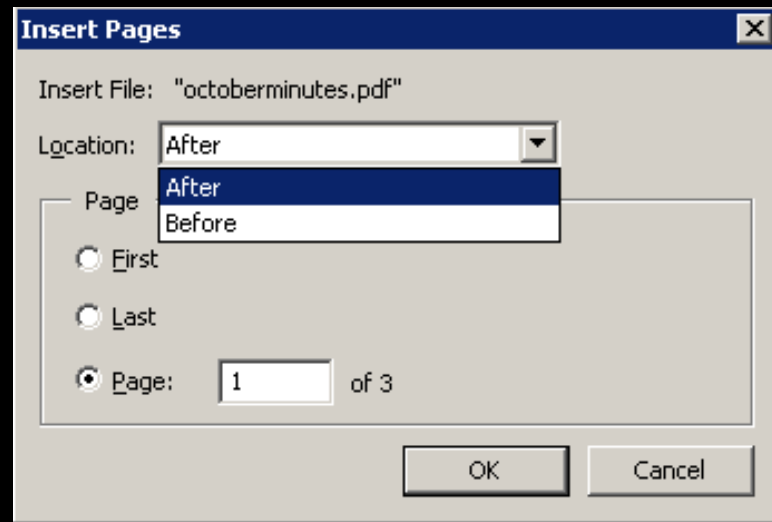
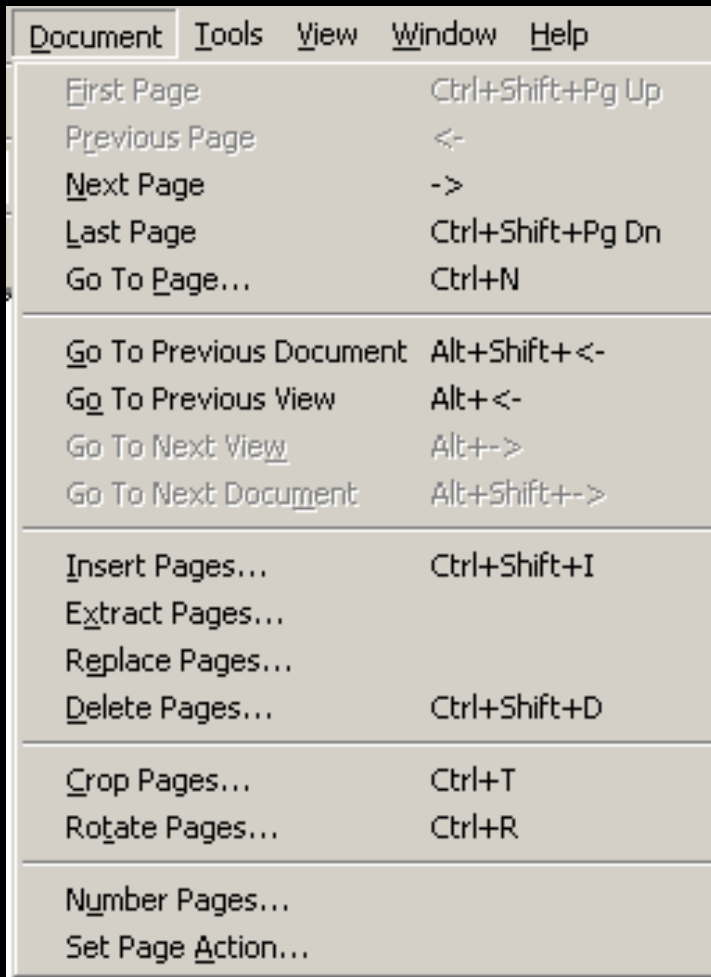
- Add links to
 - Webpages
 - Other files
 - Javascript
 - Form fields
 - Audio files
 - More!



PDF Tricks – Insert/Extract Files

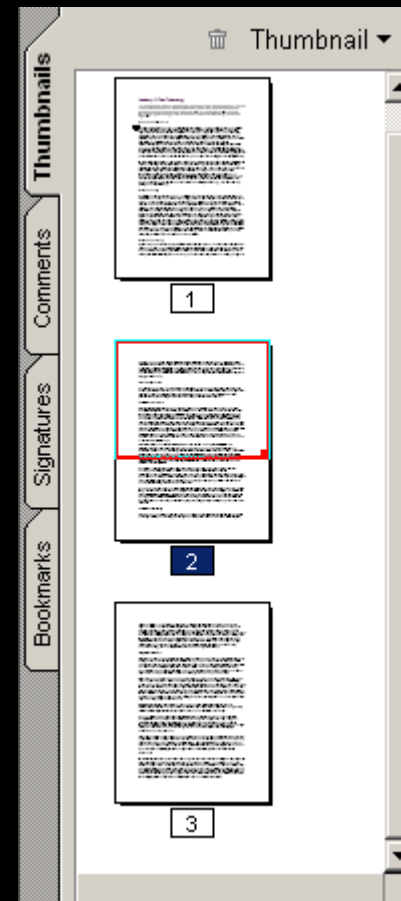
- Insert other PDF files into the document
 - Before or after current text
- Extract pages from existing document
 - Save as a separate document
 - Delete extracted pages
- Replace pages
 - Replace specific pages with specific pages from another file

PDF Tricks – Insert/Extract Files



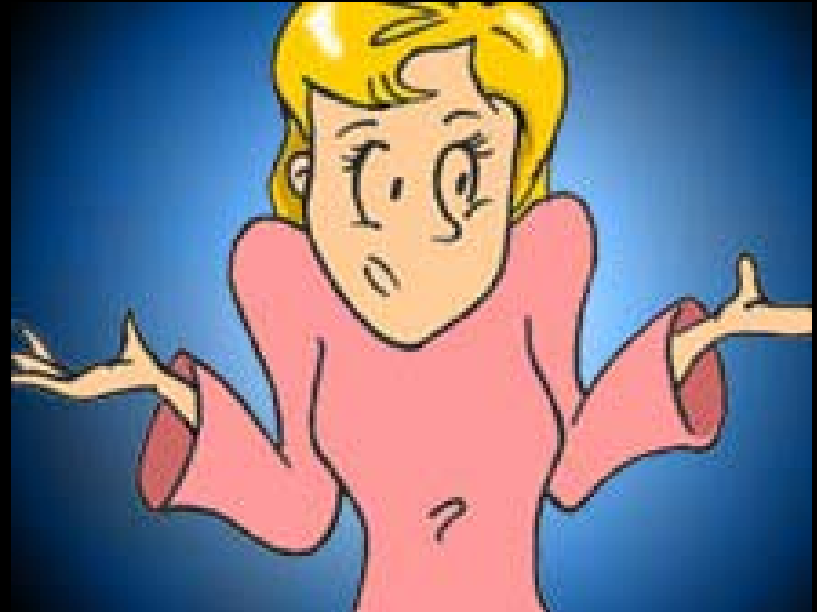
PDF Tricks – Thumbnails

- Thumbnails tab
 - Move pages (single or groups) around
 - Easily delete pages
 - Rearranging via thumbnails will not re-arrange bookmarks



PDF and Metadata Avoidance

- “Data about Data”
- Useful for finding documents, reviewing, and sharing
- Invisible, but not too hard to find
- Reveals information about electronic documents beyond the printable text



Why is it such a big deal?

- Widely known since 1998
- Mass movement to MS Word by attorneys
- Advent of efilng
- Advent of electronic discovery
- High profile examples

Examples in the News

- October 2000: WSJ reports critical “anonymous” email edited in MS Word to a candidate for the Senate reveals author – chief-of-staff of the opposing party
- February 2003 – 10 Downing Street dossier regarding Iraqi security found to be plagiarized from US researcher

More Examples in the News

- March 2004 – SCO Group, seller of Linux and Unix, files suit against DaimlerChrysler and Autozone. Metadata reveals the attorneys had originally identified Bank of America, but they were later removed from the pleading.

MS Word –What Can Be Viewed

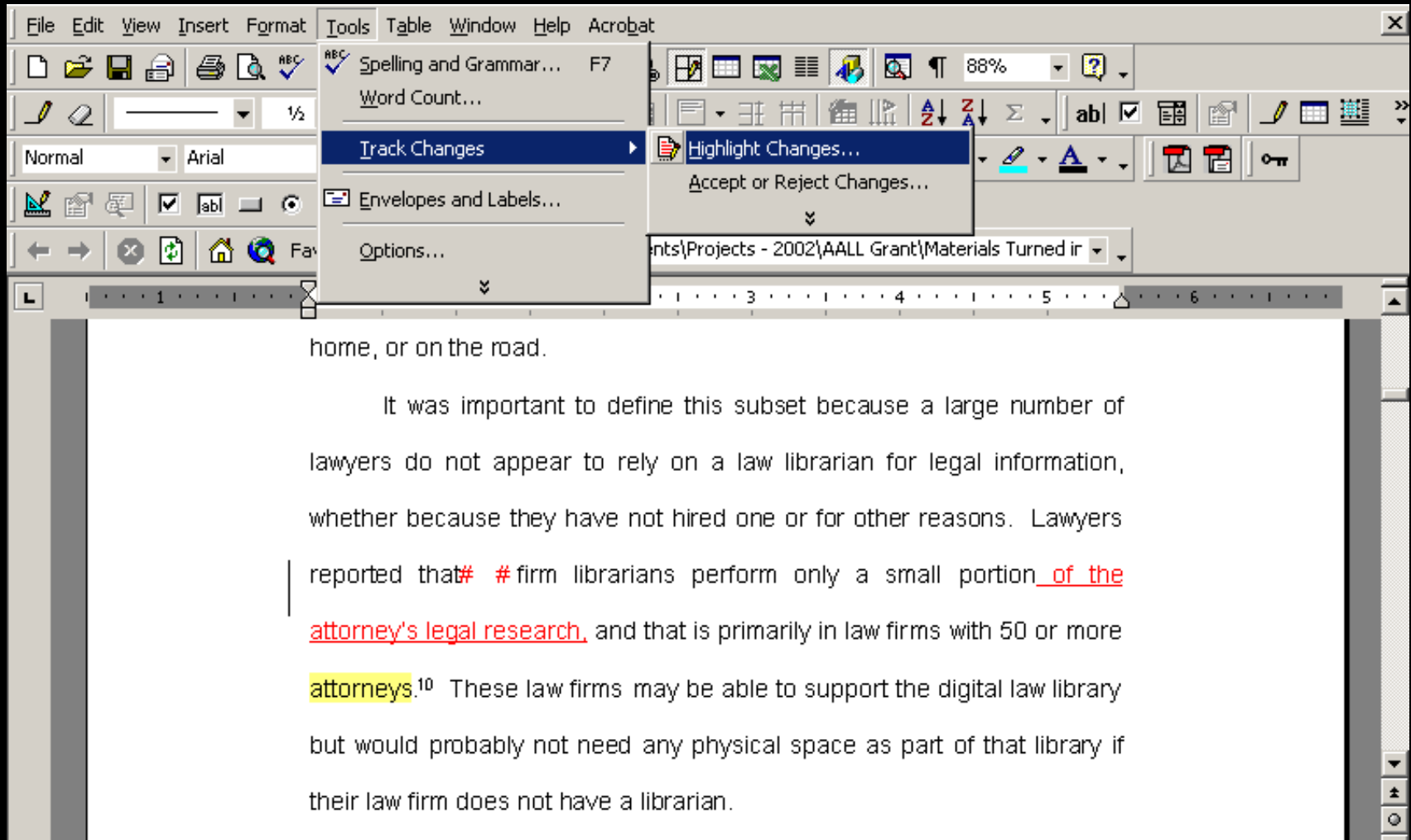
- Date created/modified/last accessed
- Number of revisions/versions
- Previous document authors
- Total editing time
- Hidden text (formatting)
- Comments
- Hyperlinks
- Redlining/changes

Metadata: How Do I See It?



- Enable “Track Changes”
- View Comments
- File – Properties and look behind the tabs
- Text editors
- Save as HTML and view source
- Third party software

Track Changes



The screenshot shows the Microsoft Word interface with the 'Tools' menu open and 'Track Changes' selected. The 'Track Changes' submenu is also open, showing options like 'Highlight Changes...', 'Accept or Reject Changes...', and 'Options...'. The document text below shows tracked changes: a red strikethrough '# # firm librarians perform only a small portion' and a red underlined insertion 'of the attorney's legal research'. The word 'attorneys' is highlighted in yellow. The status bar at the bottom indicates page 1 of 6.

home, or on the road.

It was important to define this subset because a large number of lawyers do not appear to rely on a law librarian for legal information, whether because they have not hired one or for other reasons. Lawyers reported that# # firm librarians perform only a small portion of the attorney's legal research, and that is primarily in law firms with 50 or more **attorneys**.¹⁰ These law firms may be able to support the digital law library but would probably not need any physical space as part of that library if their law firm does not have a librarian.

View Comments

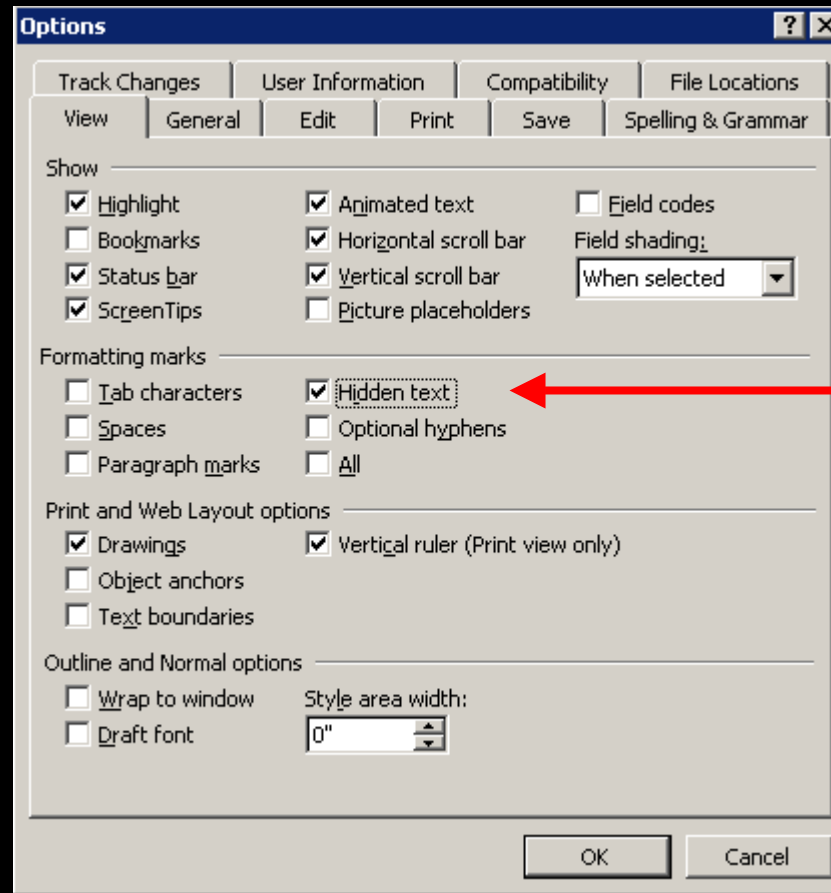
The screenshot shows the Microsoft Word 2002 interface. The 'View' menu is open, with 'Comments' selected. The document title is 'D:\My Documents\Projects - 2002\AALL Grant\Materials Turned in'. The main text reads: 'Law Office 2002^[chs7]: Technology and Demographics'. Below this, a paragraph states: 'The American Bar Foundation performed research in 1995 on the demographics of lawyers, by firm size. That research found that nearly half of all lawyers were sole practitioners, with another third practicing in law firms with 2 to 40 lawyers.¹² Of the # estimated 1 million active attorneys in the United States only approximately 108,000 work in law firms with 155 lawyers or more.¹³' A comment box at the bottom shows the comment from 'SandersC' with the text: '[chs7] FH questions the validity of a lot of the statements in this section. Again, might as

Hidden Text

Defining the Digital Library

There is no universally accepted definition of what a digital library is or what it contains. Clifford Lynch refers to it as "shorthand for digital collections in libraries."⁸ He suggests that it is an "exten[sion] of the collection to encompass substantial amounts of digital materials, making use of information systems to provide access to them, and providing a coherence of access between their digital materials and their printed materials."⁹ # | For the purposes of the research, we have defined a digital library as a library whose collection is wholly electronic – Internet-based, CD and DVD, and software-accessible (e.g., brief banks) – and yet

Hidden Text



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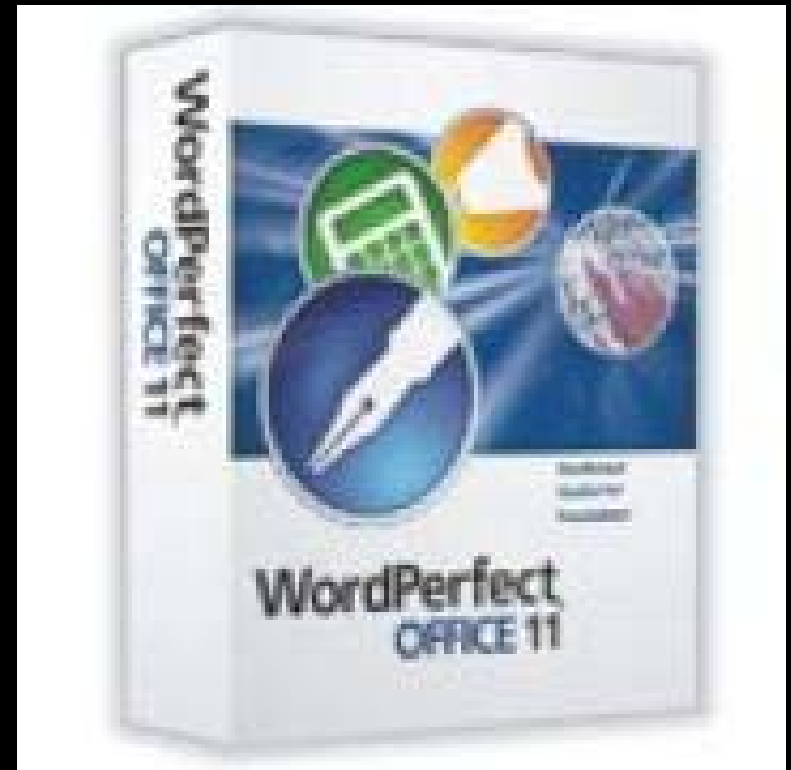
materials.⁷ This broad definition incorporates both the collection and

the services.⁸ For the purposes of the research, we have defined a digital

library as a library whose collection is wholly electronic – Internet-based,

What About Word Perfect?

- Undo command reveals changes
- Comments
- Document properties similar to MS Word
- Versions

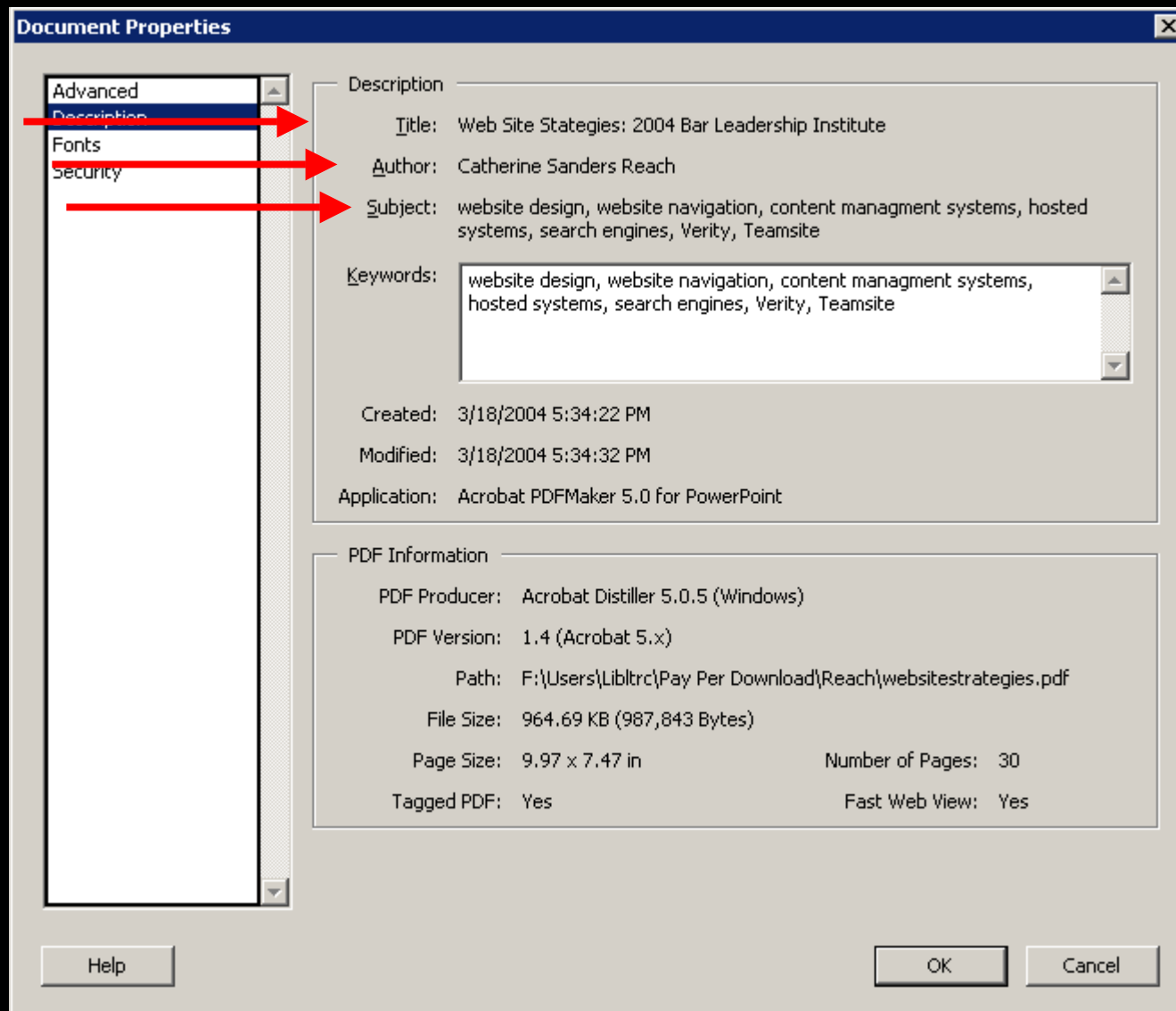


How Do You Get Rid of It?

- MS offers tools and tricks for removal
- Save as PDF
- Third party software tools

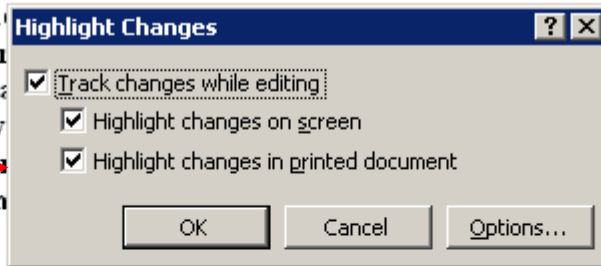


The “Save as PDF” Solution



The "Save as PDF" Solution

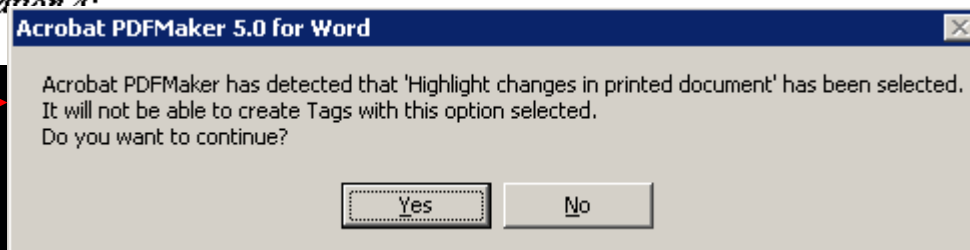
by the Office of General Counsel and monitoring of contract expense by the Finance Department is essential and an individual should be designed. Best practices would suggest that the Office of General Counsel and his/her role would be to monitor requirements, and other communications with members of the organization.



Motion to Amend Recommendation #4:

Nell Hennessy moved that SCOTIS adopt the recommendation #4 as written. Tom Jorgensen motioned that language be amended (see below). Lucian Pera seconded the motion that the recommendation stand as amended. Motion unanimously approved.

Recommendation A:



their products, services, and transactions accessible to members in # a variety of media consistent with member desires. Obviously, evaluation of whether a particular product should be made available to members, for example, in print (e.g., a hardbound book), or in electronic form (e.g., a CD-ROM), or on the web (e.g., on a limited-access web page), is best left to the entities with expertise in delivering these products, but ABA policy should encourage # such product consistent with economic reality. Further, wherever possible, multiple options should be given to members. For example, members should be afforded the opportunity at their

E-filing and PDF

- US Courts.gov CM/ECF (Case Management/Electronic Case Files)
http://www.uscourts.gov/cmecf/cmecf_about.html
- National Center for the State Courts
<http://www.ncsconline.org/>
- Courts.net E-Filing
- <http://www.courts.net/efiling.htm>
- Many use PDF as standard for documents
- Always follow court rules (will vary)

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<http://www.lawtechnology.org>



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PDF's On The Web

● When To Use

- Forms / Documents That Should Not Be Altered
- Exactness & Consistency Across Browsers
- When Time & Web Knowledge Is Limited
- Security
- Other Examples

PDF's On The Web

● When Not To Use

- Text Articles
- Web Content That Search Engines Will Index
(Note: Some SE's Will Read PDF's)
- When File Is Large
- Spam / Attachment Issues
- Blogs

Offer Both When You Are Unsure

Marketing Using PDF's

- Brochures
- Forms – Be A Resource
- Shared, Universal Documents

Consultwebs.com

- Speaker [Dale Tincher](#), Web Design, 300 Legal Clients, Consulting 919-272-8052, Dtincher@consultwebs.com
- Web Marketing
- CLE Training – PowerPoint, Internet
- Resource Location – Tips, Techniques ...