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# Contents

_Acknowledgments_ ................................................. ix
_About the Author_ ................................................. xi

## Introduction

Who Will Benefit from This Book ........................................... xiii
Editions and Versions of Acrobat Covered ................................ xiii
The Agenda ................................................................. xiv

## Overview

About PDFs ......................................................................... 1
Two Types of PDFs ............................................................ 2
Adobe Reader ........................................................................ 3
Why Use Adobe Acrobat? ...................................................... 3
Standard v. Professional ....................................................... 4
Free Trial of Acrobat ............................................................ 4
Mac v. PC: Some Differences .................................................. 5
Keyboard Shortcuts Are Important .......................................... 5
How to Learn from This Book ................................................. 6

## PART I: BASIC SKILLS

### Section 1 Setting Preferences

1.1 Accessing Preferences .................................................... 11
1.2 The Categories Pane ...................................................... 11
1.3 Commenting Options ..................................................... 12
1.4 Single-Key Accelerators ................................................ 13
Section 2 Viewing PDFs

2.1 Rotation .......................................................... 16
2.2 Page Display (Single or Scrolling) ......................... 17
2.3 Zoom: Marquee and Dynamic ............................. 18
2.4 The Loupe Tool ............................................... 20
2.5 Zoom and Page Display .................................... 21
2.6 Full Screen Mode ........................................... 22
2.7 Split Window Mode ......................................... 23
2.8 Read Mode .................................................... 24

Section 3 Navigating PDFs

3.1 Page Navigation ............................................... 25
3.2 Screen Navigation ............................................. 27

Section 4 The Interface: Menus and Toolbars

4.1 Overview .......................................................... 29
4.2 Menus and Toolbars ......................................... 30
4.3 Task Pane ....................................................... 32
4.4 The Options Menu ............................................ 33
4.5 Editing the Common Tools ................................. 34
4.6 Editing the Quick Tools ...................................... 36
4.7 Navigation Pane ............................................... 39

Section 5 Creating PDFs

5.1 PDF Creator on PC ............................................ 44
5.2 “Print to PDF” on PC ......................................... 44
5.3 “Save as PDF” on Mac ....................................... 45
5.4 Printing the Current Page ................................... 46
5.5 Converting Files to PDF ..................................... 47
5.6 Scanning to PDF ................................................. 47
Section 6  Examining PDFs .......................................................... 55
   6.1 Document Description ...................................................... 55
   6.2 Document Security ........................................................... 56

Section 7  Pages ..................................................................... 59
   7.1 Rearranging ..................................................................... 60
   7.2 Inserting ......................................................................... 62
   7.3 Create a PDF from a Blank Page .......................................... 64
   7.4 Extracting ....................................................................... 64
   7.5 Deleting ......................................................................... 65
   7.6 Replacing ....................................................................... 65
   7.7 Rotating ......................................................................... 66
   7.8 Cropping ....................................................................... 66
   7.9 Splitting ........................................................................ 68
   7.10 Headers and Footers ......................................................... 68

PART II: INTERMEDIATE SKILLS .............................................. 71

Section 8  Bookmarks ................................................................. 73
   8.1 Creating Bookmarks ........................................................... 73
   8.2 Creating Bookmarks the Fast and Easy Way ......................... 74
   8.3 Nesting Bookmarks ............................................................ 76
   8.4 Updating a Bookmark’s Destination ...................................... 77
   8.5 Renaming ....................................................................... 78
8.6 Deleting ................................................................. 78
8.7 Wrapping Long Text ................................................ 79
8.8 Splitting Pages by Bookmark ..................................... 79
8.9 Setting to Auto-Display Bookmarks ......................... 81
8.10 Changing Properties ................................................ 83
8.11 Create from Word Styles ........................................ 85
8.12 Bookmarks Need Not Follow Page Order ................. 86

Section 9 Comments 89

9.1 Highlighting ............................................................. 90
9.2 Shortcut for Highlighter Tool ....................................... 91
9.3 Adding Text Comments to Highlighting ...................... 91
9.4 Changing Comment Properties ................................... 92
9.5 Sticky Notes ............................................................. 93
9.6 Restore Deleted Sticky Note ....................................... 94
9.7 Callout Text Box ......................................................... 94
9.8 Underlining and Boxes .............................................. 95
9.9 Text Annotations ....................................................... 95
9.10 Reviewing Comments ............................................... 97
9.11 Deleting Several Comments at Once ......................... 98

Section 10 General Text Editing 99

10.1 Acrobat XI Text Editing ............................................ 100
10.2 Acrobat X Text Editing ............................................. 102

Section 11 Recognize Text Function (OCR) 105

11.1 What Is OCR and How Does It Work? ....................... 105
11.2 Optimal Scanner Settings .......................................... 106
11.3 How to Use “Recognize Text” ................................. 106
11.4 When You Shouldn’t Use “Recognize Text” ................. 109
Section 12 Stamps

12.1 Standard, Dynamic, and Custom Stamps
12.2 Custom Exhibit Stamp
12.3 Signature Stamps
12.4 Transparent Signature Stamps Are Best
12.5 Flattening Your Stamped PDFs
12.6 PDF Signatures on Mobile Devices

Section 13 Digital Signatures

Section 14 Bates Numbering

14.1 Adding Bates Numbers with Acrobat
14.2 Deleting Bates Numbers

Section 15 Redaction

15.1 Proper Redaction
15.2 Redaction Review
15.3 Create Review Summaries
15.4 Redaction Properties
15.5 Search and Redact

Section 16 Metadata Removal

16.1 How to Remove Metadata
16.2 How to Sanitize a Document

Section 17 Find and Advanced Search

17.1 Finding Text
17.2 Advanced Search
17.3 Search Indexes
Introduction

Who Will Benefit from This Book

This book can be used by lawyers, legal professionals, law students, or anyone who wants to become more proficient working with PDFs using Adobe Acrobat software.

Editions and Versions of Acrobat Covered

This book covers editions X and XI of Acrobat (earlier editions of Acrobat are no longer supported by Adobe). The interface of edition X is pretty much the same as edition XI, with one important difference, as shown in the two screenshots in Figure i:

Figure i Acrobat X Interface

In edition X, the Task Pane contains a Share menu, which allows quick access to Adobe’s SendNow service (no longer promoted in Acrobat XI).
In edition XI of Acrobat, the **Comment** menu was moved to the right, and the **Sign** menu now appears, signaling Adobe’s decision to promote the use of electronic signatures.

Both Acrobat X and Acrobat XI come in two versions, at least for Windows users. This book will also address key aspects of both the **Standard** and **Professional** versions of Acrobat for Windows, as well as the Professional version for Mac (there is no Standard version for the Mac).

**The Agenda**

**Overview.** Get an overview of PDFs, and why lawyers should learn more about how to work with them.

**Part I: Basic Skills**

**Section 1: Setting Preferences.** Discover how to create the ideal work environment in Acrobat.

**Section 2: Viewing PDFs.** Learn to quickly rotate, zoom, and see things with an optimal view.

**Section 3: Navigating PDFs.** Find out how to move around in a PDF quickly, without fumbling.
Section 4: Interface: Menus and Toolbars. Understand the overall layout and where to find the tools you’ll work with most often.

Section 5: Creating PDFs. Find out how to turn any file (or set of files) into a PDF.

Section 6: Examining PDFs. Learn to troubleshoot problem PDFs, and determine if security has been applied to limit a PDF’s access or functionality.

Section 7: Working with Pages. Discover how to rearrange pages in a PDF, remove them, insert new ones, or extract them.

Part II: Intermediate Skills

Section 8: Bookmarks. Learn to quickly set bookmarks and use them to jump to a saved view; in short: discover why they’re crucial.

Section 9: Comments. Find out why comments in PDFs are much more powerful than marginalia on paper.

Section 10: Text Editing. Become adept at adding text to a PDF, or changing text that’s already there.

Section 11: OCR or “Recognize Text.” Discover how to take a PDF that isn’t searchable and easily turn it into a searchable PDF.

Section 12: Stamps. Find out how to stamp “Draft” or “Confidential” on a PDF’s pages, how to add Exhibit stamps, and how to create signature stamps.

Section 13: Digital Signatures. Discover why true digital signatures are unnecessary, and more trouble than they’re worth.

Section 14: Bates Numbering. Learn to append text or sequential numbers to documents you have to produce or manage.

Section 15: Redaction. Find out how to obscure sensitive or confidential text in PDFs.
Section 16: Metadata Removal. Learn to efficiently sanitize hidden data you don’t want other people to see.

Section 17: Find and Advanced Search. Become proficient searching for text or phrases inside a single PDF, a group of PDFs, or non-PDF documents.

Section 18: Security. Learn how to apply security to a PDF or group of PDFs to restrict who can open the file and what can be done with it.

Section 19: PDF/A. Find out how to create a PDF/A file, which will eventually be the filing standard in all federal courts.

Appendix
Recommended Preference Settings
Keyboard Shortcut Cheat Sheet
Single-Key Accelerator Cheat Sheet
Acrobat Pro v. Standard Checklist
Adobe Reader: Features and Limitations
PDF Workflows in the Law Office
Overview

PDFs have been around for over twenty years. At first, PDFs were a novelty, but now most people are used to opening and reading PDFs. Still, many people get confused about how to work with PDFs, and why they need a program like Acrobat to manipulate PDFs. This book will explain why Acrobat is essential for the modern lawyer, and how legal professionals can use it most effectively.

About PDFs

The term “PDF” is an acronym that stands for “portable document format,” a format that was created by Adobe Systems, Incorporated. Think of PDFs as a form of “digital paper”—that is, a way to display text and graphics on a computer or mobile device. The PDF format preserves all of a document’s fonts, formatting, colors, and graphics, regardless of what kind of device was used to create the original document.

But PDFs can do more than just display text. For example, they can contain embedded files, and even display multimedia content such as audio and video files. PDF files can also be secured to prevent unauthorized changes or printing, or to limit access to confidential information.

PDFs are increasingly being adopted by state courts for e-filing. It’s now mandatory in every federal court; the “original document” filed in the record is nothing more than a bunch of ones and zeros—i.e., a PDF file.
Although PDFs were not created specifically for the legal profession, with the adoption of PDFs as a way of producing case documents, as well as their use in e-filing, lawyers now routinely encounter PDFs as part of their daily practice. It’s safe to say that PDFs are now a mainstay in the legal profession. So, it makes sense for lawyers and legal professionals to learn more about how to use PDFs: how to search for a key word or phrase in PDFs, how to tag pages within them, how to create comments, how to Bates stamp and redact sensitive information. And that’s exactly what this book is designed to help you learn.

The first step is to understand that not all PDFs are created equal.

**Two Types of PDFs**

There are two types of PDFs: some have selectable (and searchable) text, and the other kind does not. “Text PDFs” (also called “text-based PDFs”) contain selectable and searchable text. “Image PDFs” do not allow text to be selected or searched.

The difference is usually determined by how the PDF was created. Text PDFs are created by a computer that converts, say, a Word or Excel file into a PDF. Image PDFs are created using a scanner (e.g., scanning paper to PDF). Text PDFs are preferable, for a couple of reasons.

- They’re searchable, which is always a good thing.
- The text can be selected and copied and pasted elsewhere, which is handy.
- The text is often easier to read than image PDFs.
- Their file size is smaller, so it takes up less space on your hard drive.

If you have an image PDF, you can use Acrobat to convert it to a text PDF, a process that will be explained in detail in Section 11. For now, just
know that text PDFs are better, especially for case documents or any kind of file that you’ll want to be able to search or copy text from.

**Adobe Reader**

Adobe makes a free program called Adobe Reader, which is not as powerful as Adobe Acrobat. Yet, if you ask most people who have the Reader program if they have “Acrobat,” they’ll answer yes. People seem to think the terms “Reader” and “Acrobat” are interchangeable. They’re not.

Adobe Reader is more ubiquitous because it’s free. Anyone can easily obtain a copy of it by simply searching online using the phrase “free adobe reader.” The latest edition, as of the time of this writing, is edition XI, and although it’s not nearly as powerful as Acrobat, it’s quite useful for several basic tasks, such as navigating a PDF or searching its contents. Mostly, Adobe makes it available for free so people can easily open and view PDFs.

Edition XI of Reader also allows you to create comments of the type covered in Section 9. However, it doesn’t allow for the kind of basic PDF manipulation most legal professionals will need to do: bookmarking pages, rearranging pages, Bates stamping or redacting. Let’s be clear: you need Adobe Acrobat if you’re serious about using PDFs in your law practice.

**Why Use Adobe Acrobat?**

Adobe Acrobat is not the only software that allows lawyers to manipulate PDFs, but it’s widely used and very powerful. So, if you’re not going to use it you should have a good reason. Yes, it’s expensive. But if you use a cheaper program, it may not do all of the things you’ll want to do; and if you opt for another program, you’re less likely to get help figuring
out how to use it effectively in your practice. Also, most of the helpful plug-ins for lawyers, such as specialized exhibit stickers, only work with Acrobat (usually only with the Windows version). If you aren’t going to use Acrobat, make sure you understand exactly what options you’re giving up. Odds are you’re giving up more than you want to.

### Standard v. Professional

Each edition of Acrobat (X or XI) comes in two versions: Acrobat Standard and Acrobat Professional, unless you are a Mac user, in which case you can only buy Acrobat Professional.

If you’re buying your first copy of Acrobat, you should buy the Professional version first. It has two important features that every law firm will need from time to time: (1) Bates stamping, and (2) redaction. There are other benefits to having the Pro version of Acrobat, but those two are the key reasons why every law firm needs at least one copy of Acrobat Professional.

If your law firm has several lawyers or legal professionals, you might want to save money (approximately $60–$100) and buy mostly Acrobat Standard. However, if you are using Mac computers, there is no choice: you have to buy the Professional version.

Adobe has an online comparison chart showing the differences between Acrobat XI, XI Standard, and XI Professional. Here’s a short link to that online page: [http://is.gd/Q83sxg](http://is.gd/Q83sxg).

### Free Trial of Acrobat

Adobe offers free trial versions of most of its software, which can be downloaded from its website. Acrobat Professional is among the programs
that you can try for a short time (typically thirty days) for free. The trial version is fully functional and offers every feature of the paid version.

The URL for the free download is: http://www.adobe.com/downloads.

**Mac v. PC: Some Differences**

PDFs created with Acrobat (or any other third-party PDF creation program) will look exactly the same no matter what kind of computer you use. However, there are some differences between Acrobat for Macs and Acrobat for PCs, besides the fact that Mac users have to buy the Professional version.

The interfaces of the Mac and PC programs are slightly different, but for the most part the differences aren’t noticeable. In fact, anyone who uses the Mac program will be completely adept with the PC program (and vice-versa). I use both programs and never get confused, because the interfaces are almost exactly the same. (However, because I mainly use a Mac, most of the screenshots in the book will show the Mac program.)

**Keyboard Shortcuts Are Important**

To get the most out of any software, it behooves you to learn the commonly used keyboard shortcuts. The most important ones for Acrobat are set forth in the Appendix.

The keyboard shortcuts are the same on a Mac or PC, with one variant. On a Mac, the modifier key is typically the **Command** key, while on a PC it is the **Control** key. So, when I describe a keyboard shortcut, such as the one for creating bookmarks, I’ll say, “You should use CMD/CTRL + B.” The text string CMD/CTRL means that on a Mac you’d use the **Command** key, and on a PC you’d use the **Control** key.
As a mnemonic, remember that keyboard shortcuts are all about command and control. Macs are easy to train, so you can *command* a Mac. PCs are more complex, so you have to learn to *control* them. You might want to come up with your own way of remembering which key modifier applies to your computer operating system.

For a comprehensive list of Acrobat XI’s keyboard commands, go to the Help menu and choose *Adobe Acrobat XI Help*. On a Mac, you can easily find the shortcuts list from there. On a PC, find the heading that says *Workspace* and then look for *Keyboard Shortcuts*.

### How to Learn from This Book

Let’s be realistic: you won’t learn everything that’s covered in this book in one hour. But you can quickly get a sense of some practical ways you can use Acrobat to improve your law practice. Most likely, the book will serve as a frequently consulted reference manual.

The way to learn Acrobat is to focus on one skill at a time, beginning with the skills you’re likely to use most often; for example, changing page views or navigating through a PDF using bookmarks—as opposed to Bates stamping or doing redaction.

Even after you read this book, you’ll have to find ways to keep up with Acrobat as Adobe releases new editions, or as new tricks and tips are identified by lawyers who use it. For this, I recommend you visit the following websites related to the use of PDFs in the practice of law:
• **Acrobat for Legal Professionals** ([http://blogs.adobe.com/acrolaw/](http://blogs.adobe.com/acrolaw/)) A site created by Rick Borstein, who works for Adobe and knows a lot about using Acrobat in general. He isn’t a lawyer, but his blog focuses on the legal profession, and has a trove of useful information for lawyers and legal professionals. Definitely subscribe to his e-mail newsletter, so you’re assured of getting the latest posts. And check out the category links on the right-hand side of his blog; there are some incredibly useful posts there, organized by topic.

• **PDF for Lawyers** ([www.pdfforlawyers.com](http://www.pdfforlawyers.com)) A blog I created in 2004 to help lawyers learn how to get more out of PDFs in their law practices. There’s an e-mail newsletter that comes out twice a month, so you might want to subscribe to that as well to keep up with new information about using PDFs in the legal profession.

• **Paperless Chase** ([http://paperlesschase.com](http://paperlesschase.com)) I started this website (and a company of the same name) to help lawyers get more organized by pushing less paper. Since using PDFs is crucial to being paperless, you’ll find a lot of useful information about how to use PDFs there as well.

If you crave up-to-the-minute PDF tips and news, check out the PDF for Lawyers stream on Twitter ([www.twitter.com/pdflawyer](http://www.twitter.com/pdflawyer)) or the dedicated Facebook page ([www.facebook.com/PDFforLawyers](http://www.facebook.com/PDFforLawyers)), whichever medium you prefer; the information is the same in both places.

Finally, here’s a tip for quickly figuring out how to do something in Acrobat: open your favorite Internet browser and search the web using some variant of this phrase: “How do I [describe action] in Acrobat?” Rick Borstein says that’s what he does, and he works for Adobe and knows more about it than anyone I’m acquainted with. That troubleshooting tip will probably work for you as well.

Want to read more? To order *Adobe Acrobat in One Hour for Lawyers* or get more information, visit the ABA Webstore.