





What Can You Make Into a PDF?

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Types of PDFs

Digital-Native

- Created directly from original source, like Word
- Is text searchable
- Text is 100% accurate to original source
- Highest quality
- Smallest size

Image-Only

- Just an image of the original source
- Is not text-searchable
- Default type of PDF created by scanners.

Searchable (image + text)

- Has a layer of search text behind image of original source.
- Is text-searchable
- Text might not be 100% accurate
- Indispensable for law firms.









Read about it here.

Try it on Acrobat for Windows (View > Enable new Acrobat)

Can switch between interfaces



6

Acrobat Interface Terms

- Main Areas: Home, Tools, Document
- 4 Main Toolbar Areas
- 1 Secondary Toolbar
- Basic Acrobat Usage:
 - 1. Select Tool
 - 2. Secondary Toolbar appears
 - 3. Perform action
 - 4. Close Secondary Toolbar
 - 5. Rince and repeat for next action

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Viewing & Navigating PDFs



- Zooming
- Read Mode
- Full Screen Mode
- Window Menu
- Split
- Spreadsheet Split
- New Window
- Cascade/Tile

- Drag & Drop TabsBookmark & Link
- NavigationGo to a Page
- Read Out Loud

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Find & Advanced SearchFind

- Replace
- Advanced Search
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Creating PDFs

- Create from Word
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- Create from Multiple
 Documents
 - Create Single PDF from Multiple
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- Use Organize tool to combine
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Editing PDFs

- Edit Tool
- Scanned PDFs must be recognized for editable text
- "Add Text" (Typewriter Tool) can add text to any PDF
- Snapshot Tool can copy image of PDF
- PDF Security
- Comparing PDFs



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Bookmarks

- Adding Bookmarks
- Organizing Bookmarks
- Navigating Bookmarks

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Forms

- Creating Forms
- Filling Forms
- Making Forms Reader-Enabled

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Review

- Interface
- Main Window
- Customizing
- Viewing PDFs
- Manipulating Pages
 - Rotate Pages vs Rotate View
 - Page Numbers vs Page Labels
- Combining PDFs
- Shrinking and Splitting
- Security

- OCR
- Typewriter Tool
- Edit Text vs Add text
- Snapshot Tool
- PDF Portfolios
- Comments
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- Redacting

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ADOBE ACROBAT FOR LEGAL PROFESSIONALS

Covering Acrobat for Windows Versions 11 & DC



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MEET OUR TEAM OF ACROBAT EXPERTS

Meet our team of Acrobat experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching Adobe Acrobat. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.





DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



ADOBE ACROBAT FOR LEGAL PROFESSIONALS TABLE OF CONTENTS

CHAPTER 1 THE INTERFACE

Overview	3
Home Screen	4
Tools Screen	4
Navigation Pane	5
Tools Pane	6

CHAPTER 2 CUSTOMIZING THE INTERFACE

Dock the Page Controls Toolbar	7
Quick Tools	8
Recent Tools	11
Navigation Pane	
Tools Pane	
Toolbars	

CHAPTER 3 VIEWING PDFS

Opening PDFs in New Windows	
Read Mode	
Full Screen Mode	
Read Out Loud	

CHAPTER 4 MAKING PDFS TEXT SEARCHABLE

Optical Character Recognition	
Batch Processing	23
Importance of Editable Text and Images	25

CHAPTER 5 ANNOTATING PDFS

Add Text	
Text Selection	
Comments Tools	

CHAPTER 6 REDACTION

Importance of Proper	r Redaction	
----------------------	-------------	--



TABLE OF CONTENTS

37
37
37
37

CHAPTER 7 ELIMINATING METADATA



CHAPTER 1 THE INTERFACE

Overview

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FIGURE 1-1

The **Home button** opens the Home Screen, hiding the Document Screen and most other controls. See page 4 below.

The **Tools button** opens the Tools Screen, giving you access all of Acrobat's tools. The Tools Screen hides the Document Screen and most other controls. See page 4 below.

The **Document tab** opens the named document in the Document Screen.

The **Common Controls toolbar** includes buttons for commonly used commands, such as saving, printing, and navigating between pages. It is visible when the Document Screen is open.

The **Quick Tools toolbar** is a customizable toolbar that gives you one click access to the tools you use most often. It is visible when the Document Screen is open. See page 8 below for instructions on how to show, hide, and customize Quick Tools.

Recent Tools toolbar gives you one click access to your most recently used tools. It is visible when the Document Screen is open. See page 11 below for instructions on how to show or hide recent tools.



The **Navigation Pane** provides quick navigation using features such as thumbnails, bookmarks, and attachments. See page 5 below.

The **Page Controls Toolbar** includes buttons for selecting text, zoom control, and other view settings. See page 7 below for instructions on how to dock it at the top of the screen.

The **Tools Pane** is a customizable list of toolbars that provides one click access. See page 6 below.

Home Screen

The Home Screen opens when Acrobat is first opened. It can also be access from the Document Screen by clicking on the **Home Screen button**. From the Home Screen you can easily access recently used documents and check the status of documents sent for digital signatures with Acrobat Sign.



FIGURE 1-2

Tools Screen

The tools screen, accessed from the Document Screen by clicking on the **Tools button**, provides access to all of Acrobat's tools, organized into toolbars. Click on the name of a toolbar to open it.

Searching for Tools

The easiest way to navigate the Tools Screen is to search for tools. Click in the Search tools box at the top and type your search term. The list of toolbars will automatically be filtered to the relevant options.



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Navigation Pane

The Navigation Pane provides quick navigation using features such as thumbnails, bookmarks, and attachments.

If the Navigation Pane is hidden, click on the arrow on the left-hand side of the screen to expand the Navigation Pane.

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FIGURE 1-4



Tools Pane

The Tools Pane gives you one click access to toolbars. The Tools Pane can be minimized to show icons for each toolbar or expanded to show the icon and the toolbar name.

To expand the Tools Pane, click on the arrow on the right-hand side.



FIGURE 1-5

See Chapter 2 for instructions on how to customize the Tools Pane.



CHAPTER 2 CUSTOMIZING THE INTERFACE

Dock the Page Controls Toolbar

To prevent the Page Controls toolbar from disappearing, click on the button on the **Page Controls toolbar** to dock it at the top of the screen.



FIGURE 2-1



Quick Tools Showing/Hiding Quick Tools

To show or hide the Quick Tools, **right-click** in the toolbar, and select either **Hide Quick Tools** or **Show Quick Tools**.



FIGURE 2-2

Customizing Quick Tools

To customize the Quick Tools, right-click on Quick Tools, and select Customize Quick Tools...



FIGURE 2-3



Adding Tools

To add tools to Quick Tools, expand the sections under **Choose tools to add** to clicking on the section name.

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Tools to show in Toolbar:	0		▶	Ū	
Choose tools to add:					
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▶ Comment					
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▶ Scan & OCR					
▶ Protect					
Prepare Form					
▶ Combine Files					
Optimize PDF					
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FIGURE 2-4



Select the tool to add and click on the up arrow to add it to Quick Tools.

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Color Document				-	
Color Image					
Custom Scan					
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FIGURE 2-5



Reordering Tools

To reorder tools within Quick Tools, select the tool to move and click on the right or left arrow.

Customize Quick Tools		>	×
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FIGURE 2-6

Removing Tools

To remove a tool from Quick Tools, select the tool to delete and click on the trashcan.

Customize Quick Tools		×
Tools to show in Toolbar:	0	Ŵ

FIGURE 2-7

Recent Tools

To show or hide the Recent Tools, **right-click** in the toolbar, and select either **Hide Recently Used Tools** or **Show Recently Used Tools**.



FIGURE 2-8



Navigation Pane

To customize which buttons appear in the Navigation pane, **right-click** on the **Navigation Pane** and click on buttons to toggle them on or off.



FIGURE 2-9

Tools Pane

To customize the Tools Pane, open the Tools Screen by clicking the **Tools button**.



Adding Tools

To add tools to the Tools Pane, click on the Add button.

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FIGURE 2-10





Reordering Tools

To reorder tools, drag-and-drop them on the right-hand side.

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FIGURE 2-11



Removing Tools

To remove a tool, click on the dropdown arrow next to Open, and select Remove Shortcut.



FIGURE 2-12



Toolbars

To customize which tools appear in a particular toolbar:

- 1. Open the toolbar.
- 2. **Right-click** on the toolbar and select **Customize... Tools**.

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FIGURE 2-13

3. Select the tools to be shown and click on the **up arrow** to show them.

Customize Comment Tools				×
Tools to show in Toolbar:		Þ	Ū	
Choose tools to add:				
Comment		^		
戻 Sticky Note				
🖉 Highlight				
T Text				
န္ Stamps	*		oî	
G Attach File				
Record Audio				
T_{lpha} Insert Text				
규 Replace Text				
T Strikethrough		*		
	Save		Cancel	

FIGURE 2-14



4. To remove tools from the toolbar, select it and the **trashcan**.

Customize Comment Tools			×
Tools to show in Toolbar:	0	▶	Ŵ

FIGURE 2-15

5. To reorder tools, select the tool to be moved and the left or right arrow.

Cust	omize Comment Tools					\times
	Tools to show in Toolbar:	0	•	▶	Ŵ	
	同					
						_

FIGURE 2-16



CHAPTER 3 VIEWING PDFS

In addition to the main screen, Acrobat offers several other modes to view a PDF:

Opening PDFs in New Windows

By default, PDFs are opened in tabs within the same window.



FIGURE 3-1

To open PDF side-by-side, drag-and-drop one of the tabs away from the other ones. That PDF will open in a new window.



FIGURE 3-2

Document Tab Settings

If you'd prefer for PDFs to open in their own window every time, go to the **Edit menu**, and click on **Preferences**. Click on **General** on the left-hand side. Uncheck the box next to **Open documents as new tabs in the same window**. Click **OK**, and **restart** Acrobat.

Preferences		×
Categories:	Basic Tools	
Commenting	Use single-key accelerators to access tools	
Documents	Create links from URLs	
Full Screen	☐ Make Hand tool select text & images	
Page Display	Make Hand tool read articles	
	Make Hand tool use mouse-wheel zooming	
Accessibility Action Wizard	Make Select tool select images before text	
Adobe Online Services	Show quick actions on text selection	
Catalog Calar Management	Show online storage when opening files	
Content Editing	Show online storage when saving files	
Convert From PDF	Open PDFs from last session on Acrobat launch	
Convert To PDF Email Accounts	Open documents as new tabs in the same window (requires relaunch)	

FIGURE 3-3



Read Mode

Read Mode hides all the controls, except for the menu, on the screen and fills the window with the PDF. Press the Escape key to return to the main screen or toggle back and forth with **CTRL + H**.

Full Screen Mode

Full Screen mode fills the entire computer screen with the PDF. This is often helpful to use during presentations, so you can hide busy and distracting toolbars. Press the Escape key to return to the main screen, or toggle back and forth with **CTRL + L**. This is important to remember with Acrobat DC because if you put it in full screen mode, the ONLY way to get it out of that mode is **Ctrl + L**.

To zoom in and out while in full screen mode, place your mouse on the center-point, and then hold your **Ctrl** key and use your mouse scroll wheel to zoom in and out.



Read Out Loud

If the PDF is text based or the text has been recognized, Acrobat can read the PDF using a builtin speech synthesizer. To have Acrobat read a PDF:

- 1. Click **View → Read Out Loud → Activate Read Out Loud**.
- 2. Click View **>** Read Out Loud **>** Read Page or Read To End of Document.

\Lambda HMS	6C 0	perating A	greem	ent - Ado	be Acroba	t Pro D	C (32-ł	oit)				
File Ed	dit	View E-S	Sign	Window	Help			1				
Hom	ne	I	Rotate	e <u>V</u> iew		I	Þ	Offic	ce Lease -	Physi		
B	ć		Page	<u>N</u> avigati	on		•					
]	<u>P</u> age	Display		I	•					
Ċ			<u>Z</u> oom				Þ					
Д			<u>T</u> ools				•					
0j			<u>S</u> how,	/Hide			•					
Ū		I	Displa	y T <u>h</u> eme	2	I	•					
			<u>D</u> ispla	y Size			•					
		100 m	Rea <u>d</u>	Mode		Ctrl	+H					
			<u>F</u> ull So	reen Mo	de	Ctr	I+L					
			Trac <u>k</u> e	۲								
		I	Re <u>a</u> d (Out Lou	d	I	•	De <u>a</u>	ctivate Re	ead Out Lo	ud	Shift+Ctrl+Y
		9	<u>C</u> omp	are Files				Read	d This <u>P</u> ag	ge Only		Shift+Ctrl+V
								Read	d To <u>E</u> nd (of Docume	nt	Shift+Ctrl+B
								Pa <u>u</u> s	se			Shift+Ctrl+C
						Fo	hr	<u>S</u> top	D			Shift+Ctrl+E

FIGURE 3-4



CHAPTER 4 MAKING PDFS TEXT SEARCHABLE

Optical Character Recognition

Many copiers/scanners create image-only PDFs. You cannot search for particular words inside the PDF when it is image only. The process of making image only PDFs text searchable is called Optical Character Recognition ("OCR").

To OCR a PDF:

- 1. Open the Scan & OCR toolbar.
- 2. Click on **Recognize Text**.
- 3. Select In This File.

Scan & OCR	hsert •	📩 Enhance 🔻	🗛 Recognize Text 🕶	Bates Numbering	•	A N	Q	Ŵ	Close
C			In This File	·S					^ S
			FIGUI	RE 4-1					

4. Click on Settings.



5. For **Output**, select **Editable Text and Images**. See page 25 for an explanation of why this is so important.

Recognize Text	\times
Pages	
All pages	
○ Current page	
◯ From page 1 to 16	
Settings	
Document Language English (US) 🗸	
Output Editable Text and Images 🗸	
Downsample To 600 dpi 🗸 🗸	
OK Cancel	

FIGURE 4-2

6. Click on **Recognize Text**.



Batch Processing

You can OCR multiple PDF files at once.

- 1. Open the Scan & OCR toolbar.
- 2. Click on Recognize Text.
- 3. Select In Multiple Files.



FIGURE 4-4



4. Click on **Add Files...** to select the files to be OCRed.

ncel

FIGURE 4-5



5. Choose where to save the new files, how to name them, and whether to overwrite existing files.

Output Options	\times
Target Folder The Same Folder Selected at Start A Folder on My Computer	
File Naming	
Insert Before Insert After + original file name+pdf	
✓ Overwrite existing files	
OK Cancel	

FIGURE 4-6

- 6. Click **OK**.
- 7. For Output, select Editable Text and Images.

Importance of Editable Text and Images

You can improve the quality of scanned documents and reduce the PDF file size by turning on Editable Text and Images in Acrobat DC when converting image-only PDFs to text-searchable PDFs.

To appreciate what Editable Text and Images can do, below is a screen shot of some text scanned at 300 dpi in an image-only PDF zoomed in 1,000%.



FIGURE 4-7



Here is the same text after the PDF was made searchable using Editable Text and Images. As you can see, the difference is dramatic.



FIGURE 4-8



CHAPTER 5 ANNOTATING PDFS

You use the Comment and Edit PDF tools to annotate PDFs. Annotations added from the Comment tools show in the Comments pane and be exported in a comments summary.

Add Text

The **Add Text tool**, found in the **Edit PDF tools** (found on the Tool screen - see page 4), allows you to type anywhere on a PDF simply by clicking and typing.

Edit PDF	🕑 Edit	T Add Text	Add Image	P Link •	Crop Pages	💾 Header & Footer 🔻		Close
----------	--------	------------	-----------	----------	------------	---------------------	--	-------

FIGURE 5-1

To change font or paragraph properties of the text, use the **Edit PDF pane** on the right-hand side.



FIGURE 5-2



Text Selection

If you select text, you can highlight it, underline it, strike through it, copy it, or edit from the floating menu that appears.



FIGURE 5-3

Comments Tools

The **Comment tools**, found on the Tools screen (see page 4), allow you to annotate the PDF with:

- Sticky notes
- Highlighting
- Underlining
- Strike throughs
- Notes to replace text
- Insertions
- Text comments
- Text boxes
- Free hand drawings
- Stamps
- Attachments
- Shapes



FIGURE 5-4



Comments Pane

Annotations added with the **Comment tools** appear in the **Comments pane**.



FIGURE 5-5

From the **Comments pane**, you can post comments, reply to comments, delete comments, change comments properties, or mark comments as completed.

Posting Comments

When you post a comment, you can mention others by email address in the comment using @. When others are mentioned, the PDF will be saved to Acrobat's Document Cloud and they will be provided access to it. You are not required to mention anyone to post a comment. Posting comments is required for replying to comments (see below).

ddavisroe 2:24 PM	
🖉 Highlighted Text	
This needs verified. @jschoenberger@affinityconsulting.com	
@	ost

FIGURE 5-6



Replying to Comments

You can reply to posted comments by clicking on the comment in the **Comments pane**, and adding your reply in the **Add a reply... box**. Unposted comments cannot be replied to. Click **Post** after finishing your reply.

You can also mention others by email address in the reply using @. When others are mentioned, the PDF will be saved to Acrobat's Document Cloud and they will be provided access to it.



FIGURE 5-7

Deleting Comments

To delete a comment, click on the **... button** to the top-right of the comment in the **Comments pane**, and select **Delete**.

ddavisroe 2:14 PM		K		
🖉 Highlighted Text		<u>C</u> opy Te	ext	
Add a comment	Ι.	Edit		
@	ost	Delete		
	_	Set Stat	us	•
ddavisroe 2:24 PM		Propert	ies	
🖉 Highlighted Text		Add Ch	eckmark	

FIGURE 5-8


Changing Comment Properties

To change comment properties, such as colors, click on the **... button** to the top-right of the comment in the **Comments pane**, and select **Properties**.



FIGURE 5-9

Marking Comments as Completed

To change the status of a comment, click on the **... button** to the top-right of the comment in the **Comments pane**, and click on **Set Status**, and select the desired status.

ddavisroe 2:14 PM	++	<u>s</u>		
Highlighted Text		<u>C</u> opy Text		
Add a comment		Edit		
Add a comment		Delete		
@	Post	S <u>e</u> t Status	×	✓ <u>N</u> one
ddavisroe 2:24 PM		Properties		Accepted
Highlighted Text		Add Checkmark		<u>C</u> ancelled
				Co <u>m</u> pleted
			1.6	<u>R</u> ejected

FIGURE 5-10

Text Comments

Text comments allow you to add text to a PDF, similarly to the Add Text tool (see page 27). Text comments, however, appear in the Comments pane and appear in the Comments summary.





You can change the font, font size, font color, and line spacing of text comments. If you want more formatting options, consider the Add Text tool (see page 27). To change the formatting of a Text Comment, click on the **Aa button**.



FIGURE 5-12

Text Boxes

Text boxes allow you to add text inside a box anywhere on your PDF.



FIGURE 5-13

With text boxes, you can change the font, font size, font color, alignment, and make the text bold, italics, underlined, stricken through, subscript, or superscript using the **Aa button**.



FIGURE 5-14

To change the box properties, such as the outline or fill color, click on the **... button** to the topright of the comment in the **Comments pane**, and select **Properties**.



FIGURE 5-15



Attach files

You can insert other files (such as a Word file) into a PDF. It appears as an icon and if you double click it, the original file will open in its original format (it is not converted to PDF).

You can record voice messages and attach them to PDF using Attach Files.



Printing Comments

When you print a PDF with annotations, you need to do two things to make sure they all appear on the printed version. First, you need to go into Acrobat's Preferences (**Edit menu Preferences**), then click on **Commenting** + check **Print notes and pop-ups**.

Preferences		Х
Categories: Commenting ^ Full Screen General Page Display Accessibility Action Wizard Adobe Online Services Catalog Color Management	Viewing Comments Font*: Segoe UI Pop-Up Opacity: 85 Enable text indicators and tooltips Print notes and pop-ups Show lines connecting comment markups to their pop-ups on mouse rollover Ensure that pop-ups are visible as the document is scrolled Show comments pane when a PDF with comments is opened	

FIGURE 5-17



Then, when printing, under **Comments & Forms**, select **Document and Markups** to print the comments.

Print	×
Pri <u>n</u> ter: Columbus Office 2 \checkmark <u>P</u> roperties Ag	dvanced Help 🗇
Copies: The Print in grayscale (bla	ack and white) 🗌 Save ink/toner 🕕
Pages to Print	Scale: 96%
● <u>A</u> II ○ C <u>u</u> rrent ○ Pages 1 - 16	8.5 x 11 Inches
More Options	terrer announced to be addressing and the fact and terrer for the foreign to be the first of the fir
Page Sizing & Handling (i)	where give the spectra set of the structure are not the spectra set of the first set of the spectra set of t
Size Poster Multiple Booklet	(2) We array due to the two of two of the two of the two of tw
○ <u>F</u> it ○ Actual size	where "the initial and the distribution of the "theory initial and the init
Shrink oversized pages O Custom Scale: 100 %	The second se
Choose paper source by PDF page size	The second
Print on <u>b</u> oth sides of paper	the first and the second
Orientation:	Manuface and the second
Auto OPortrait OLandscape	ngstalld
Comments & Forms	
Document and Markups V Summarize Commen <u>t</u> s	Page 4 of 16
Page <u>S</u> etup	Print Cancel

FIGURE 5-18



Comment Summaries

To create a comment summary, click on the **... button** in the top right-hand corner of the **Comment pane** and select **Create Comment Summary...**

6 comment	s Q A T 🕶 🖓
PAGE	Expand All
	Collapse All
	Print with Comment Summary
sdfso	Create Comment Summary
G	Import Data File
Oper	Export Selected to Data File
	Export All To Data File
Add	Export to Word
0	Export to AutoCAD
Doul	Commenting Preferences

FIGURE 5-19



Filtering Annotations

You can filter or display the annotations by author, comment type, or color Click on the **filter button** in the **Comments pane**:

6 comments	Q	₽ ▼ …
COMMENT BY		
TYPES Highlight Sticky Note	Text B	ox
Hide All Comments		
Clear All		Apply

FIGURE 5-20

Floating Toolbar Options

When the Comments tools are closed, you can then change comment properties using the floating toolbar. To use the floating toolbar, click on the annotation and then select click on the colored circle.





CHAPTER 6 REDACTION

Importance of Proper Redaction

The importance of properly redacting a document cannot be understated. **Using the Redaction tools, as described in this chapter, is the only proper way to redact information.** Any other method may result in the disclosure of redacted information. One merely needs to read the news to see prominent attorneys in trouble for improperly redacting documents.

Step 1: Save a Copy First

Redactions cannot be undone unless the PDF is closed without saving changes. Therefore, you want to start by saving a copy of your PDF. Keep the original intact and redact the information from the copy.

Step 2: Open the Redaction Toolbar

Start by opening the Redact toolbar (see page 4).



FIGURE 6-1

Set 3: Set the Redaction Properties

To change the redaction to any color other than black or use overlay text, you need to change the Redaction Properties. Click on dropdown arrow next to **Redact Text & Images** and select **Properties**. Once redaction properties are set, the PDF is ready for redaction.

Rec	dact	🖀 Redact Text & Images 🔻 🧴 Sar	itize Document	Apply Close
þ	Bookmarks ×	Redact Pages		^ 🕑
<		Properties	ARTICLE 8	P

FIGURE 6-2

Step 4: Mark for Redaction

Once the properties are set, mark the information to be redacted by manually selected the information, searching for the information, or redacting whole pages.

Manually Redact Text and Images

1. Click on the Redact Text & Images button.

- 2. Select the text/image to be redacted.
- 3. Continue to select text and images until all information to be redacted is marked.

Search and Redact

Warning About Searching to Redact

The Search and Redact function will not catch misspellings or text not explicitly searched for. When using the Search and Redact function, **it is critical that one review the PDF to ensure that all information has been properly selected and marked for redaction**. To search for text and mark it for redaction:

1. Click on the **Redact Text & Images dropdown arrow + Find Text & Redact**.

Red	lact	Redact Text & Images 🔹 🧃 Sanitize Docur	nent Apply Close
ß	Bookmarks X	Redact Pages	^ 🕑
		Properties ARTICLE	8





2. Perform a search for the desired text, phrase or pattern.

🥕 Search	_		Х
Arrange Windows			
Where would you like to search?			
In the current document			
○ All PDF Documents in			
🔂 My Documents			\sim
Search for:			
○ Single word or phrase			
O Multiple words or phrase			
Patterns			
Social Security Numbers			\sim
	Search & Re	emove T	ext
This pattern will search for 9-digit social se consecutive or 3 digits plus 2 digits plus 4 punctuation marks).	ecurity numb digits (separ	ers, eit ated b	ther y
For example: 123-45-6789			
Choose different locale for patterns			

FIGURE 6-4



- 3. Click on the Search & Remove Text button.
- 4. Select the results you would like to mark by checking the boxes to the left of the result list.
- 5. Then select Mark for Redaction.

Redact Whole Pages

Select Redact Text & Images dropdown arrow + Redact Pages.

Red	lact	🖀 Redact Text & Images 💌	Sanitize Document	Apply Close
ſÐ	Bookmarks X	Redact Pages		^ 🖪
		Properties	ARTICLE 8	P
	insolvency or A			

FIGURE 6-5

Step 5: Apply Redactions

Once the redactions are marked, click on the Apply button to apply the redactions.

Redact	📕 Redact Text & Images 🔻 🧧 Sanitize Document	Apply Close
	FIGURE 6-6	

Do Not Skip Applying Redactions

Once redacted, you will not be able to undo the redaction (unless you close the PDF without saving). Be sure to save the redacted PDF. If you do not apply redactions, then any information marked for redaction in Step 4 remains easily readable.



CHAPTER 7 ELIMINATING METADATA

PDFs, just like word processing documents, have metadata. To remove metadata from a PDF:

- 1. Open the Redact toolbars (see page 4).
- 2. Click on Sanitize Document.



3. Click on the **Click Here link** to selectively remove metadata.

Removes hidden that sensitive inf	data and metadata from your document so ormation is not inadvertently passed along
when you publis	h your PDF. (i)
To selectively rer	nove hidden information Click Here.

FIGURE 7-2

4. Check the boxes next to the information you want to remove.

Ъ.	Remove Hidden Infor X	
U		
П		
ക	Status:	
200	Finding Hidden InformationDone	
Ø	Remove	
	Results: \bigoplus \bigcirc	
	> S vietadata (1 item)	
	> 🐼 Bookmarks	
	> 📝 Hidden text (29 pages	
	Peleted or cropped cc	
	inks, actions and java	4

FIGURE 7-3

5. Click on the **Remove button**.



LEAVE THE TRAINING TO US.

- Comprehensive digital courses
- Affordable membership plans
- On-demand training videos
- Live training sessions
- "Ask the Expert" sessions
- Customizable training plans

Affinity Insight offers insightful training programs created by legal professionals for legal professionals. Our digital courses and training membership plans give you access to some of Affinity's most dynamic law firm management and legal technology trainers—not just for a day or a week, but all year long. Join live training sessions with your peers or learn at your own pace with bite-sized, on-demand training modules. Design a custom training plan for yourself or everyone in your firm. Learn more at https://affinityinsight.com

