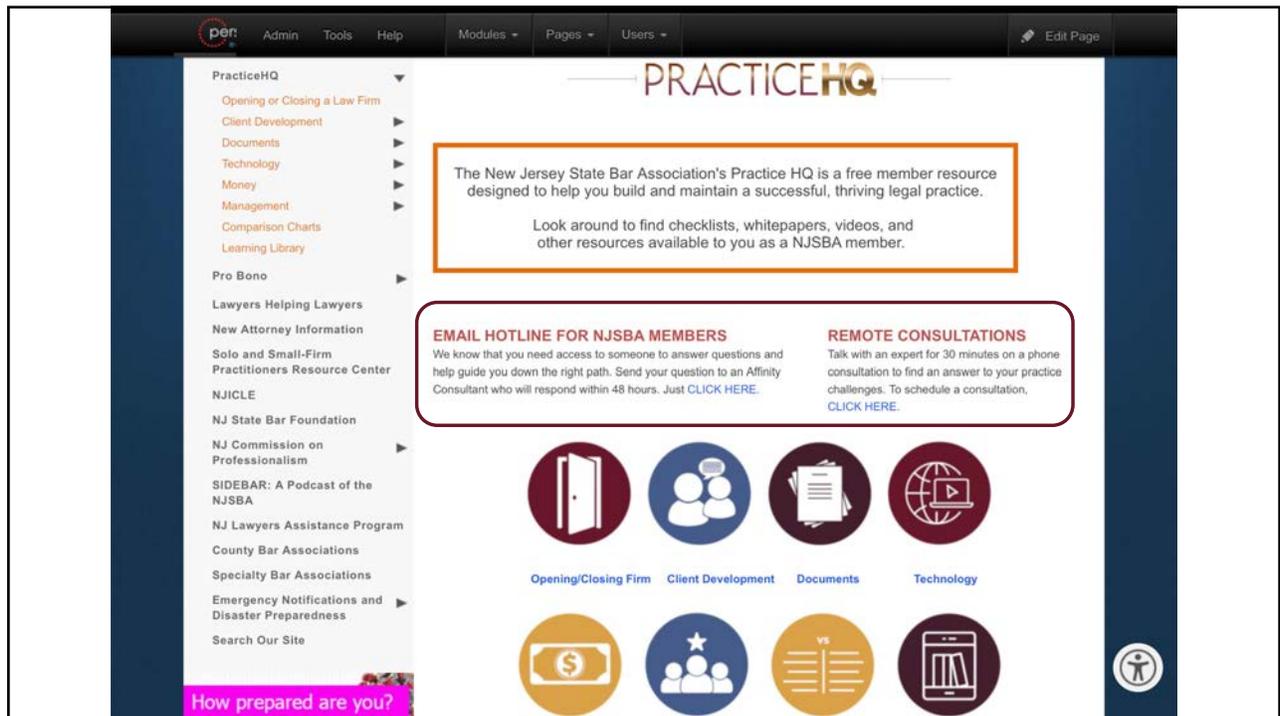




PDF POWER HOUR IN ADOBE ACROBAT

Jeffrey Schoenberger jschoenberger@affinityconsulting.com



PERF Admin Tools Help Modules Pages Users Edit Page

PRACTICEHQ

The New Jersey State Bar Association's Practice HQ is a free member resource designed to help you build and maintain a successful, thriving legal practice.

Look around to find checklists, whitepapers, videos, and other resources available to you as a NJSBA member.

EMAIL HOTLINE FOR NJSBA MEMBERS
We know that you need access to someone to answer questions and help guide you down the right path. Send your question to an Affinity Consultant who will respond within 48 hours. Just [CLICK HERE](#).

REMOTE CONSULTATIONS
Talk with an expert for 30 minutes on a phone consultation to find an answer to your practice challenges. To schedule a consultation, [CLICK HERE](#).

Opening/Closing Firm Client Development Documents Technology

How prepared are you?

What is a PDF?



- **P**ortable **D**ocument **F**ormat files:
 - A self-contained file that looks the same everywhere, on any device.
 - Created by Adobe in 1993.
 - Made an open ISO standard and released public patent (ISO 32000-1) in 2008

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What Can You Make Into a PDF?



- Electronic Files (Word, Excel, Pages, Google Docs, etc.)
- Digital Images (TIFF, JPG, PNG)
- Paper Documents (via a scanner device or app)
- Webpages
- Email

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Types of PDFs



- Digital-Native (“Text”) PDFs
- Image-Only PDFs (Scanned PDFs)
- Searchable PDFs (Image + Text)
 - Digital-native PDFs are searchable by their nature.
 - Image-only PDFs can be made searchable via OCR (Optical Character Recognition)
- PDF/A (archival PDF; popular for court filings)
- Combined PDFs (Binder or PDF Portfolio)

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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

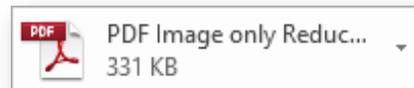
Image-Only

- 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.

Types of PDFs



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More About PDF/A



- Designed for long-term storage.
- Many courts require them.
- Must be “self-contained”.
- Nothing pretty, fancy, noisy, or external to the PDF.
 - No embedded font.
 - No encryption.
 - No audio
 - No video
 - No links to external material like websites or anything outside of the PDF document.

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New Interface Coming

Read about it [here](#).

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

Can switch between interfaces

Adobe PDF & E-signatures Adobe Acrobat Features Compare plans Resources Learn & Support Free trial [Buy now](#)

Search Adobe Support

Introducing the new Acrobat experience

Last updated on May 24, 2023

Get more out of Acrobat now. Introducing a simpler and more intuitive experience for Acrobat desktop, making it easier for you to view content and perform your everyday actions on the PDF.

What's new?

- A unified global bar for ease of access and improved document visibility.
- A mega verb bar to get work done faster with purpose-driven PDF tools - Edit, Convert, Sign without switching screens or leaving your document.
- A hamburger menu in Windows that replaces the regular File menu.
- Discover panel to get tool recommendations.
- The document pane to display your content.
- A navigation pane to bookmark, view or navigate pages, and access various viewing options.
- A quick tools pane to add annotations, select text or objects, fill in a PDF form, and customize the tools pane.

The screenshot shows the Adobe Acrobat desktop interface. At the top, there is a 'Global Bar' with icons for File, Edit, Convert, and Sign. Below it is a 'Mega Verb Bar' with large buttons for 'Edit', 'Convert', and 'Sign'. On the left side, there is a 'Navigation Pane' with a hamburger menu icon. The main content area displays a PDF document with the text 'About us.' and a 'TOWNSEND' logo above it.

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. Rinse and repeat for next action

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The screenshot displays the Adobe Acrobat interface for a document titled "NDA - Blank.pdf". The interface is organized into several key areas:

- Top Navigation Bar:** Includes "Home", "Tools", "Document Tab", "Page Controls", "Quick Tools", "Recent Tools", and "Sharing Tools".
- Left Navigation Pane:** Shows a list of page thumbnails for the document.
- Central Document Viewer:** Displays the text of a "NON-DISCLOSURE AGREEMENT". The text includes sections for "THIS NON-DISCLOSURE AGREEMENT", "WHEREAS" clauses, and "1. Confidential Information". Red lines indicate redacted areas in the document.
- Right Tools Pane:** A vertical toolbar containing various tools such as "Create PDF", "Combine Files", "Edit PDF", "Export PDF", "Organize Pages", "Send for Comments", "Comment", "Fill & Sign", "Request E-signatures", "Scan & OCR", "Protect", "Prepare Form", "Redact", "Action Wizard", "Stamp", "Print Production", and "More Tools".

Selecting and Using Acrobat Tools

Each tool has its own toolbar that appears when you click the tool.

Click Close to close the tool

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Customizing

"I hate tabs.

I want each document in its own window."

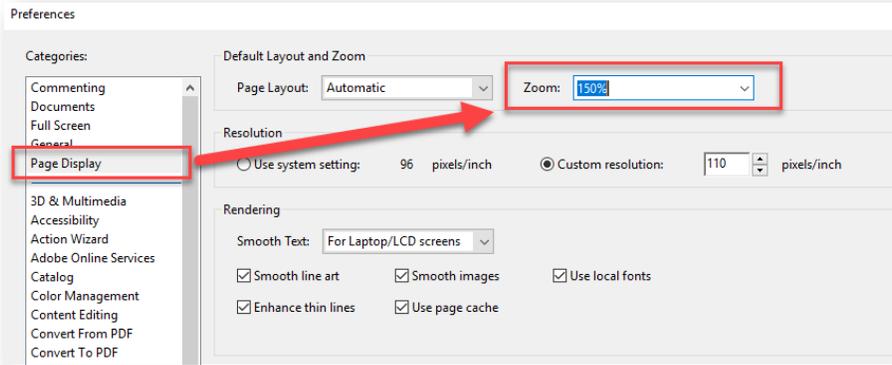
Uncheck and restart Acrobat. Documents will all open in separate windows.

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Customizing



"I want the same zoom setting each time I open Acrobat."

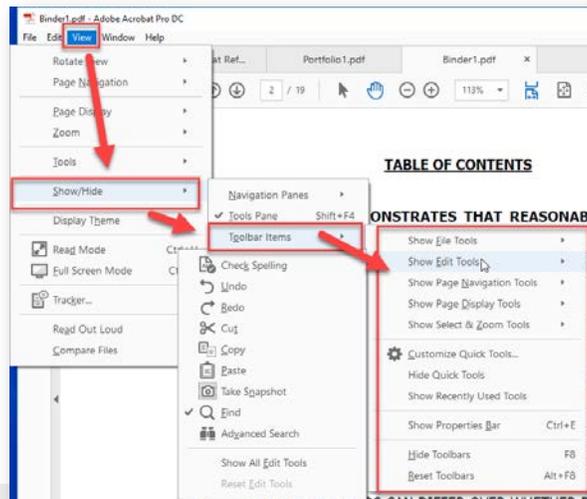


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Customizing



"The screen is too busy. How do I hide some of this."

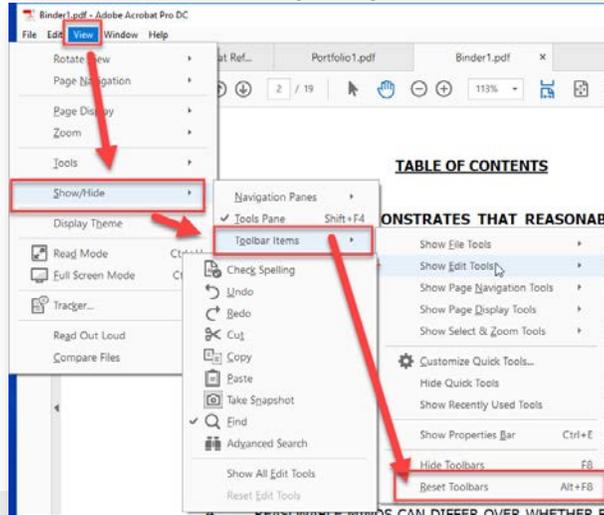


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Customizing



"I messed up my toolbars."



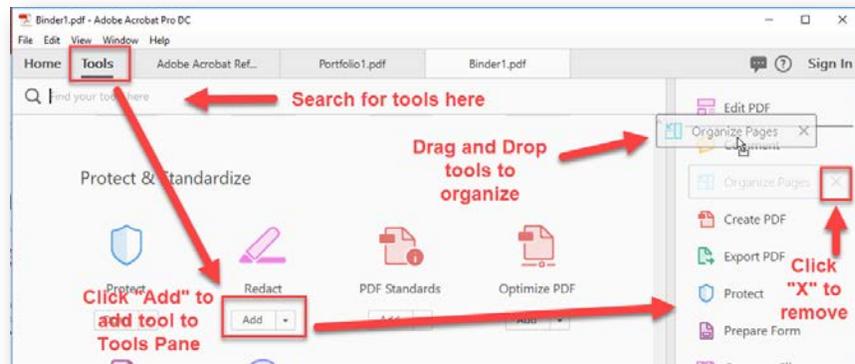
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Recommended Customizations



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Customizing the Tools Pane



Click into the Tools area to configure the Tools Pane.

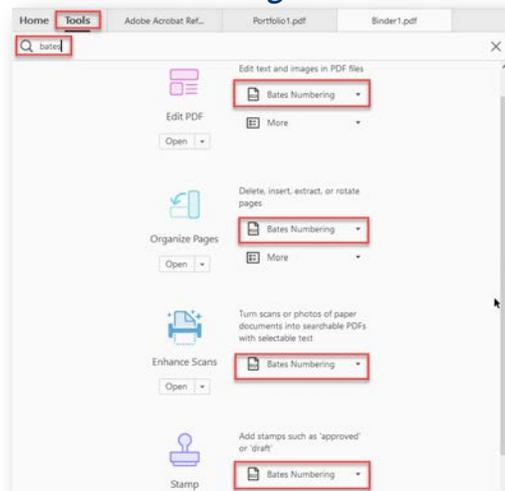
If you are in a document tab, you will need to right click on the tool to change.

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Customizing the Tools Pane

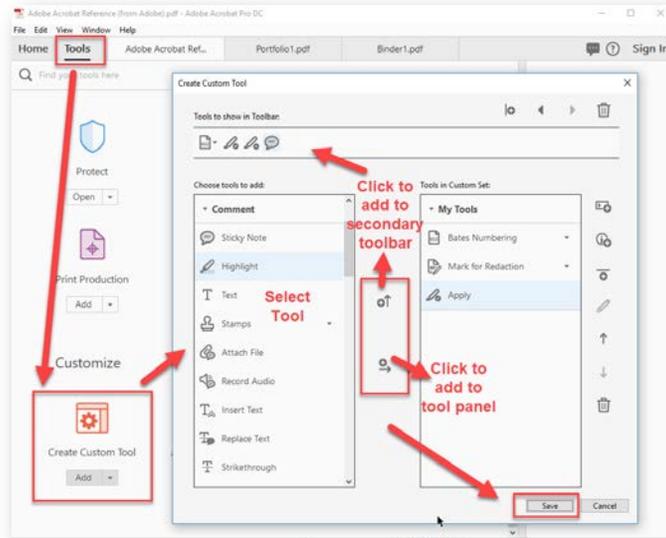


Note: The same feature might be in more than one tool.



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Custom Tools



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VIEW & NAVIGATION

Viewing & Navigating PDFs

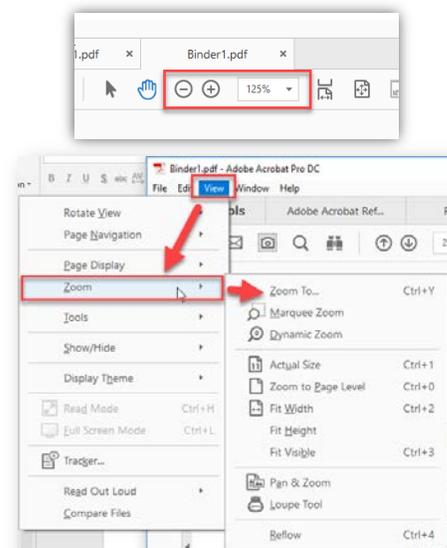


- Zooming
- Read Mode
- Full Screen Mode
- Window Menu
 - Split
 - Spreadsheet Split
 - New Window
 - Cascade/Tile
- Drag & Drop Tabs
- Bookmark & Link Navigation
- Go to a Page
- Read Out Loud

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Zoom

- + and – buttons or the zoom control
- CTRL + mouse wheel
- Miscellaneous tools (Marquee Zoom)
- View -> Zoom
Remember you can set your preferred zoom in the options (prior slide).



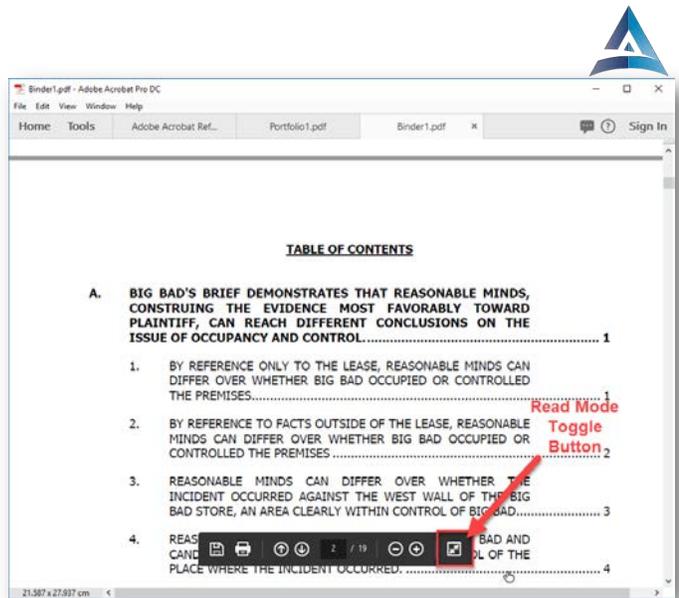
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Read Mode

CTRL + H (hide everything else in the window)

Read Mode hides all toolbars and side panes and adds a "floating" navigation bar near the bottom of the screen.

Press CTRL + H or Escape or click the Read Mode button to leave Read Mode.



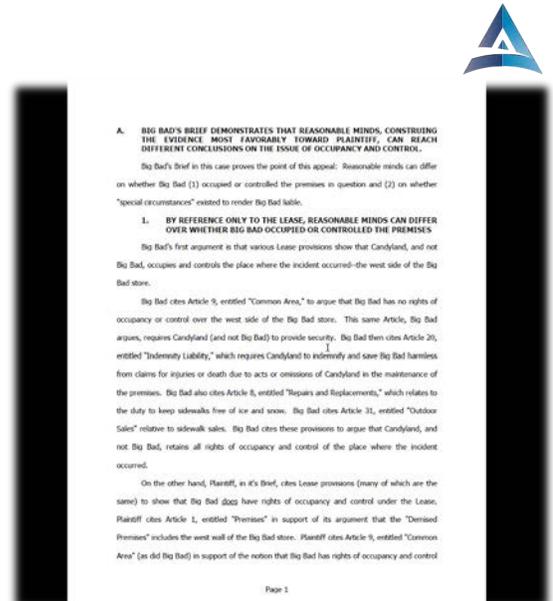
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Full Screen View

CTRL + L (look at the document, and nothing else)

Full Screen Mode takes over the entire screen and displays the document one page at a time.

Press CTRL+L or Escape to leave Full Screen Mode.

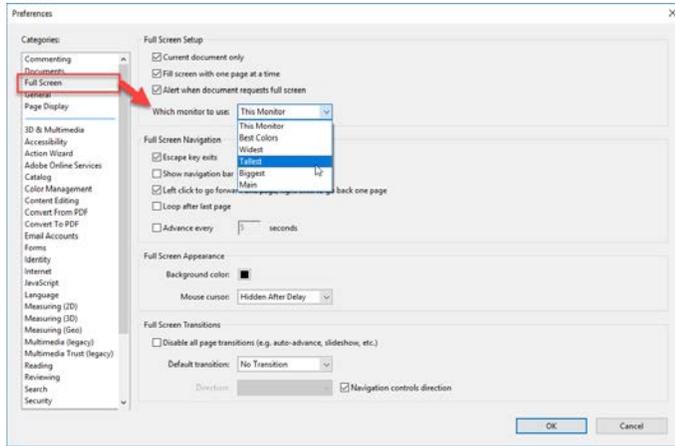


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Full Screen Mode Options



Can specify which monitor will display Full Screen Mode.



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Full Screen Mode Options

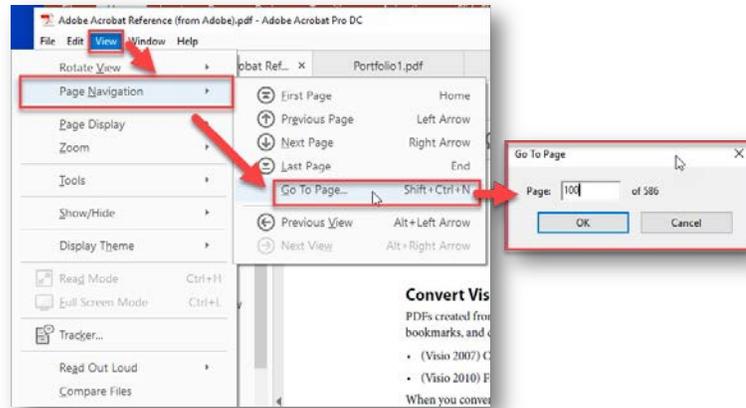


Can specify which monitor will display Full Screen Mode.



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Go to a Particular Page

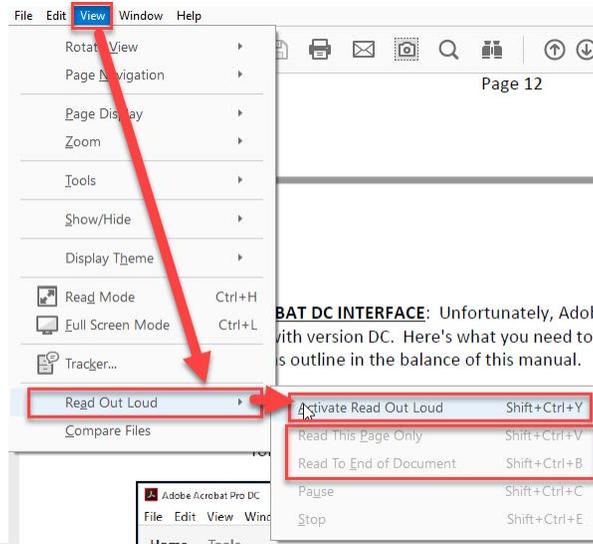


Go There Now



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Read Out Loud



ADOBES ACROBAT DC INTERFACE: Unfortunately, Adobe Acrobat Pro DC does not have a Read Out Loud feature with version DC. Here's what you need to know about the Read Out Loud feature's outline in the balance of this manual.

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Find & Advanced Search



- Find
- Replace
- Advanced Search
- Indexing

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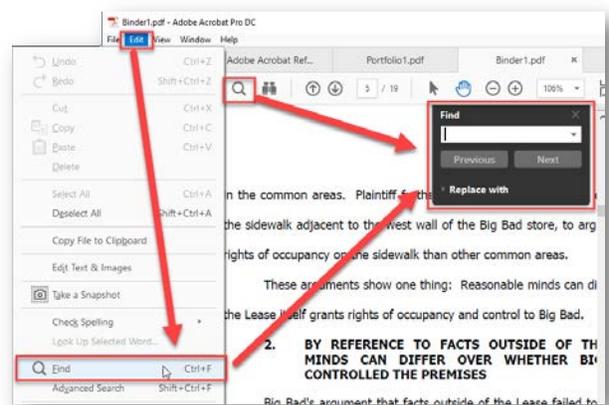
Find

Use Find to search through one PDF.

Edit->Find
Magnifying Glass Icon
CTRL+F

CTRL+G = Find Next
(Go to next)

CTRL+SHIFT+G = Find Previous
(Go to previous)



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Replace



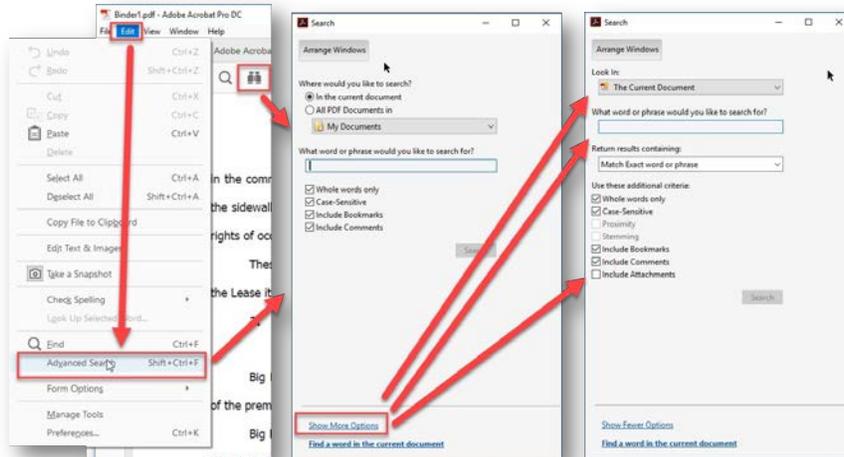
Replace only works with a “True PDF” or a PDF that is searchable with editable text.

There is no “Replace All” feature.

When you activate the Replace feature, Acrobat will automatically activate the Edit tool.

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Advanced Search



Binoculars Icon, Edit->Advanced Search or CTRL+SHIFT+F.

Note the “Show More Options” link at the bottom of the window.

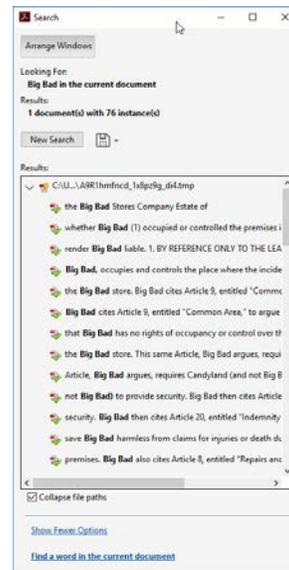
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Advanced Search

Search current document
 Search a folder of PDFs
 Search PDF Index

Returns a list of search hits

Search results are links to location in the document(s)



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Indexing



To add a searchable index to a PDF, select the Index tool, click "Manage Embedded Index" and embed the index.

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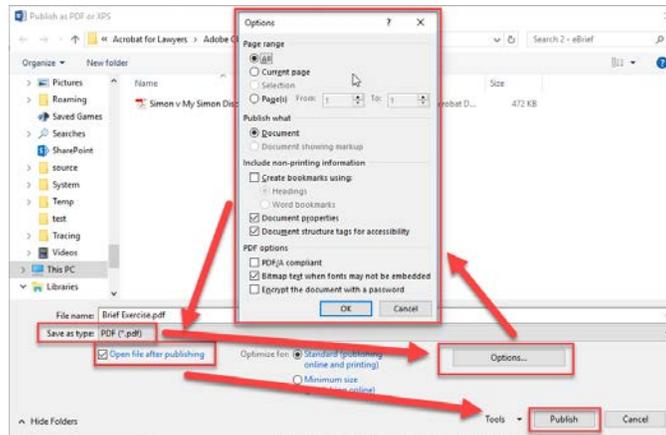


Creating PDFs



- Create from Word
- Create from Outlook
- Create from Scanner
- Create from Multiple Documents
 - Create Single PDF from Multiple Documents
 - Use Organize tool to combine
 - Use Page Thumbnails to combine
- Page Numbering
- Page Labels
- Watermarks
- Create from Clipboard
- Create from Web Page
- Create from Printing
- PDF Portfolios

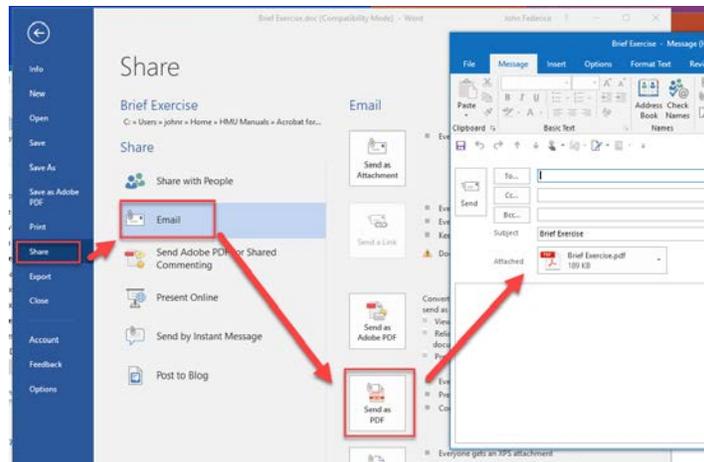
Creating PDFs from Word



Native Word Interface (without Acrobat)

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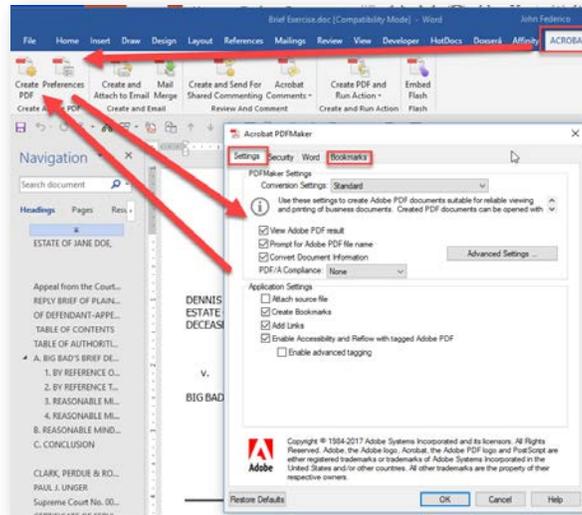
Creating PDFs from Word



Email from native Word Interface (without Acrobat)

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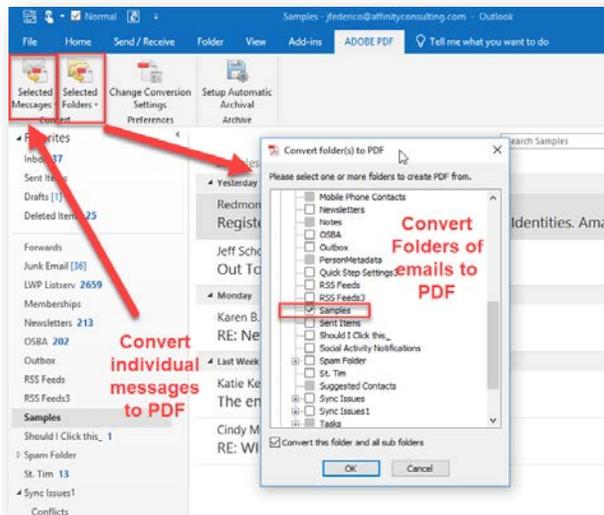
Creating PDFs from Word



Acrobat

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Creating PDFs from Outlook

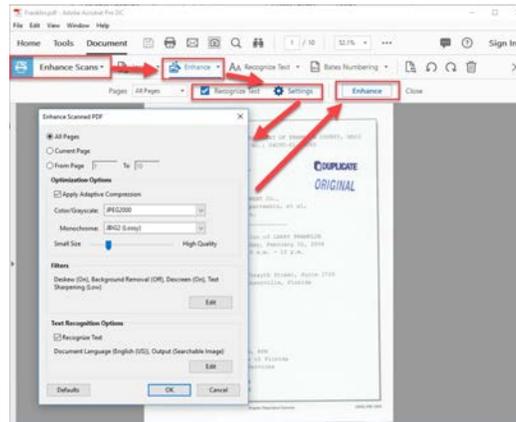


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Creating PDFs from Scanner



Scanner just takes a "picture" of the document.
Use the Enhance Scan tool to OCR, deskew and enhance the scan.

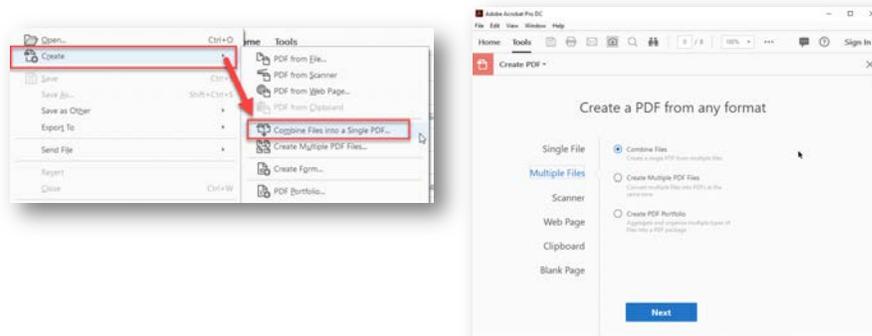


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Creating PDF from Multiple Documents



File->Create->Combine Files into a Single PDF
Create Tool -> Multiple Files -> Combine



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Creating PDF from Multiple Documents



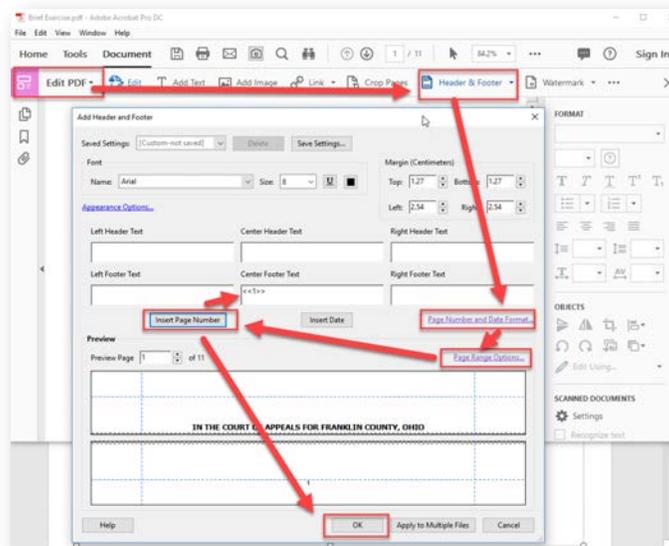
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Adobe will automatically convert documents to PDF.

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Add Page Numbering



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Creating PDFs (Miscellaneous)



- Create from clipboard
- Create from a web page
- Create by printing

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PDF Portfolios



Main difference with a Portfolio is that it contains documents other than PDFs.

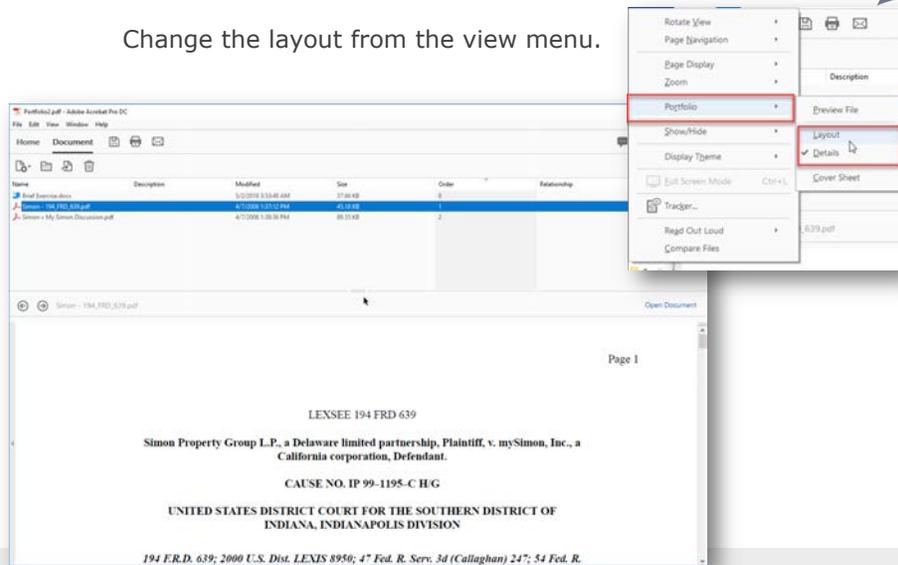


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PDF Portfolios



Change the layout from the view menu.



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MANIPULATE PDFS

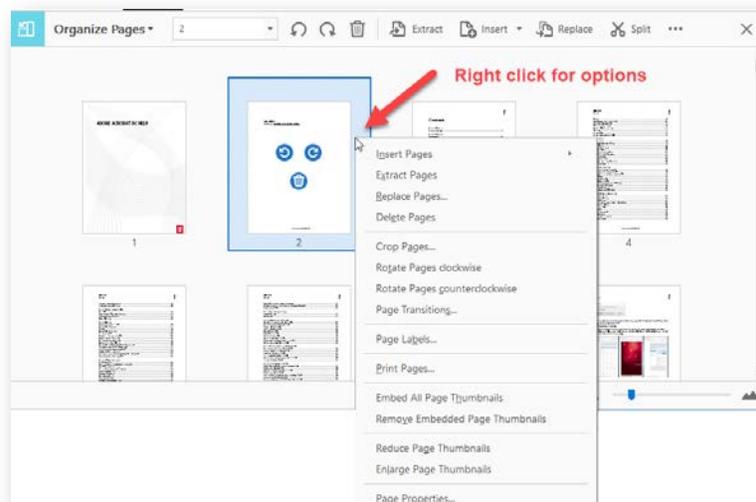
Manipulating PDFs



- Organize Tool
- Thumbnails
- Split Document
- Shrink Document
- Convert Document
- Editing PDFs
- Securing PDFs
- Comparing PDFs

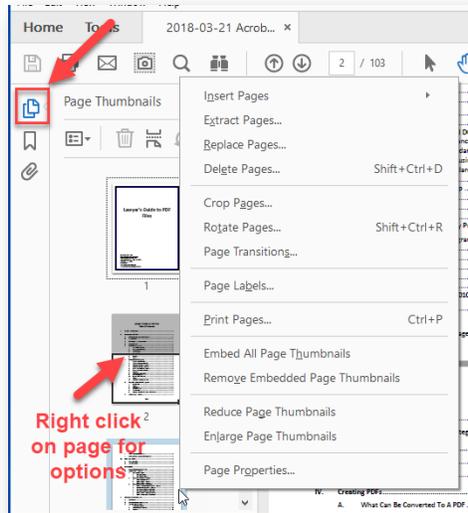
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Organize Tool



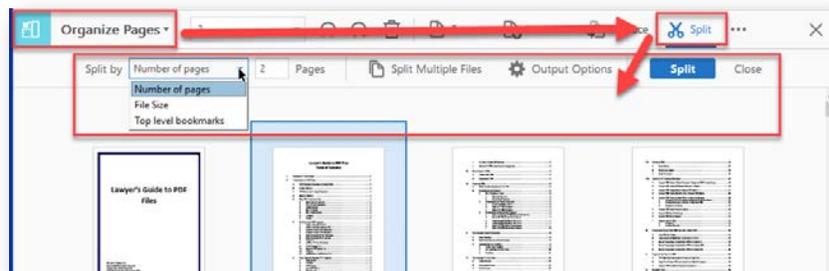
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Page Thumbnails



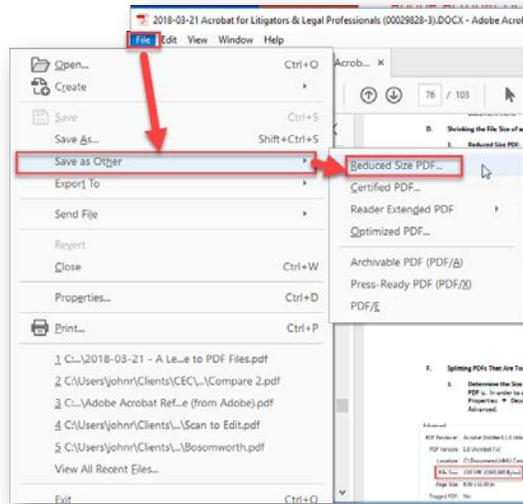
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Split Documents



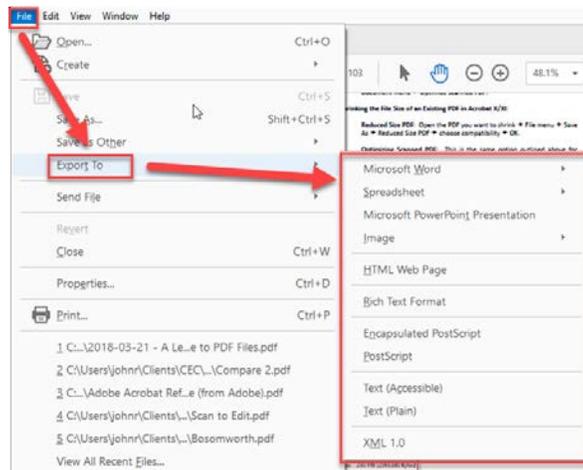
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Shrink Documents



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Convert Documents



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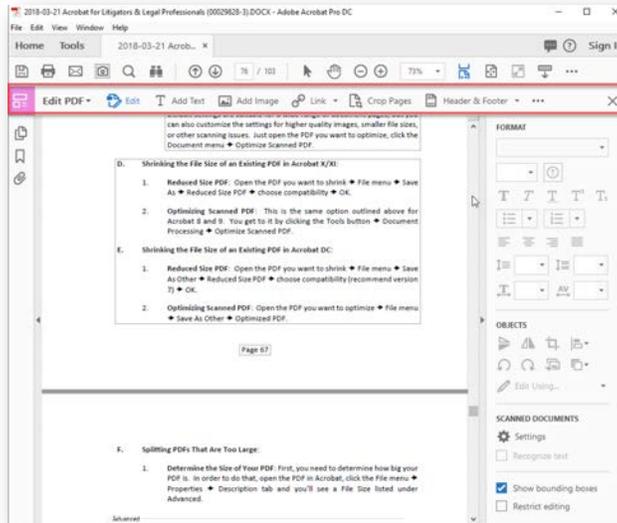


Editing PDFs



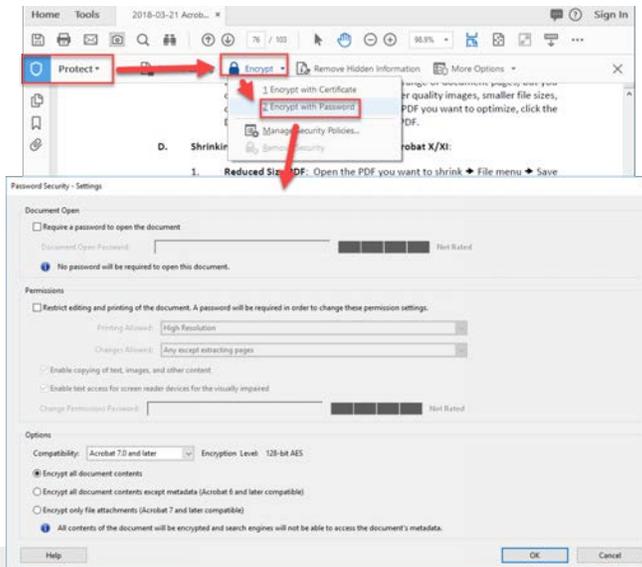
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- Snapshot Tool can copy image of PDF
- PDF Security
- Comparing PDFs

Edit Tool



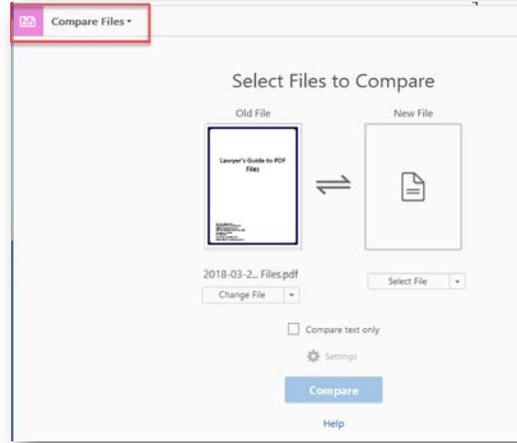
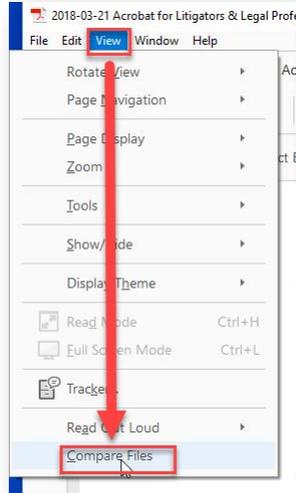
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PDF Security



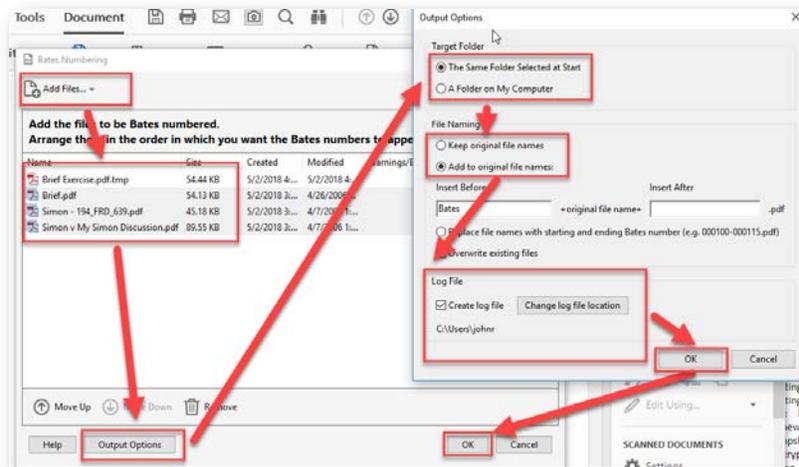
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Compare PDFs



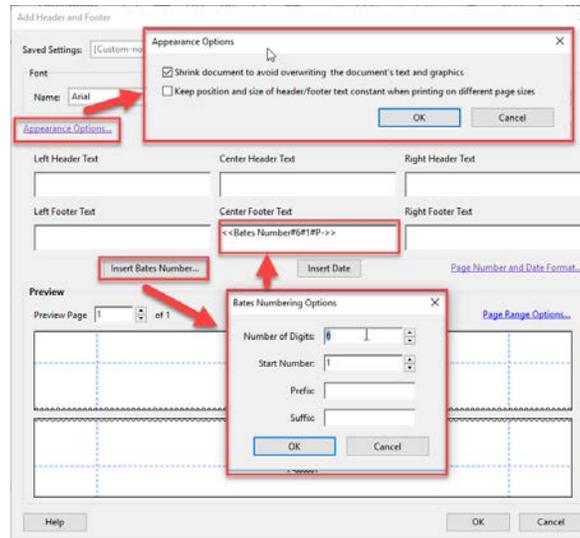
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Bates Numbering (1)



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Bates Numbering (2)



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Redacting PDFs



You must use the Redaction Tool.

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Redacting PDFs

Authorities botched attempt to redact report on Florida school massacre

By Michael Hechtman

August 4, 2018 | 9:40pm | Updated



Getty Images

School officials in Florida need to sign up for remedial computer courses.

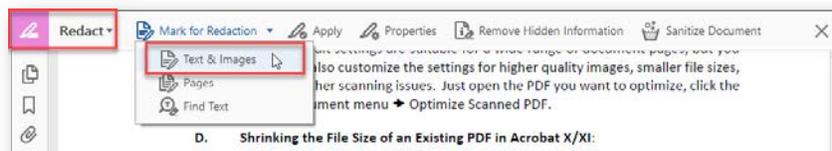
Authorities in Broward County, Fla., tried to literally cover up parts of a report on the **Parkland school massacre** — but failed because they didn't know that the sections they blacked out became visible when pasted into another computer file.

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Redaction – Manual

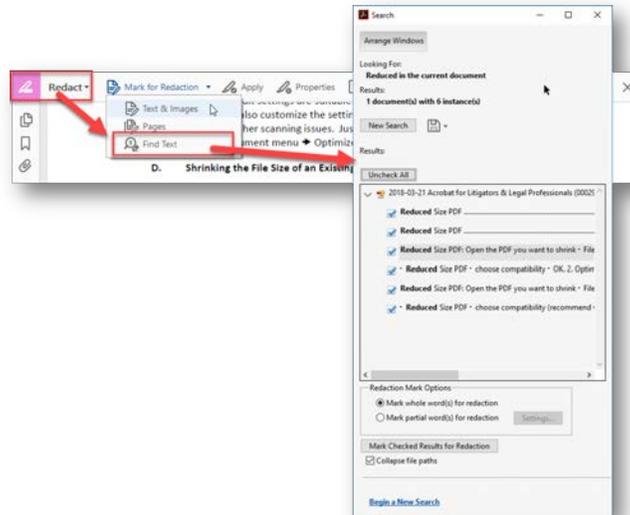


1. Save your document with a different name
2. Mark areas for Redaction
3. Apply Redactions
4. Save



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Redaction – Search and Redact



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Comments



- Comments (Comment Tool)
- Shared Review (Send for Comments Tool)
 - Email
 - Shared Server like SharePoint
- Enable Reader for Commenting

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Signature Stamp



- Stamp Tool
- Signature Tool

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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
- Electronic "Stamp" Signature
- Bates Numbering
- Redacting

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THANK YOU!

Jeffrey
Schoenberger

jschoenberger@affinityconsulting.com



ADOBE ACROBAT

FOR LEGAL PROFESSIONALS

Covering Acrobat for Windows
Versions 11 & DC

ADOBE ACROBAT

FOR LEGAL PROFESSIONALS

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The materials in this book were written using Adobe Acrobat Pro DC and all steps and instructions were tested prior to the publication date. As Adobe continuously updates Acrobat DC, your software experience may vary slightly from what is seen in this manual.

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Version 3.02



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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.....	12
Tools Pane.....	12
Toolbars.....	16

CHAPTER 3 VIEWING PDFS

Opening PDFs in New Windows.....	18
Read Mode.....	20
Full Screen Mode.....	20
Read Out Loud.....	21

CHAPTER 4 MAKING PDFS TEXT SEARCHABLE

Optical Character Recognition.....	22
Batch Processing.....	23
Importance of Editable Text and Images.....	25

CHAPTER 5 ANNOTATING PDFS

Add Text.....	27
Text Selection.....	28
Comments Tools.....	28

CHAPTER 6 REDACTION

Importance of Proper Redaction.....	37
-------------------------------------	----

Step 1: Save a Copy First..... 37

Step 2: Open the Redaction Toolbar..... 37

Set 3: Set the Redaction Properties..... 37

Step 4: Mark for Redaction..... 37

CHAPTER 7 ELIMINATING METADATA

CHAPTER 1

THE INTERFACE

Overview

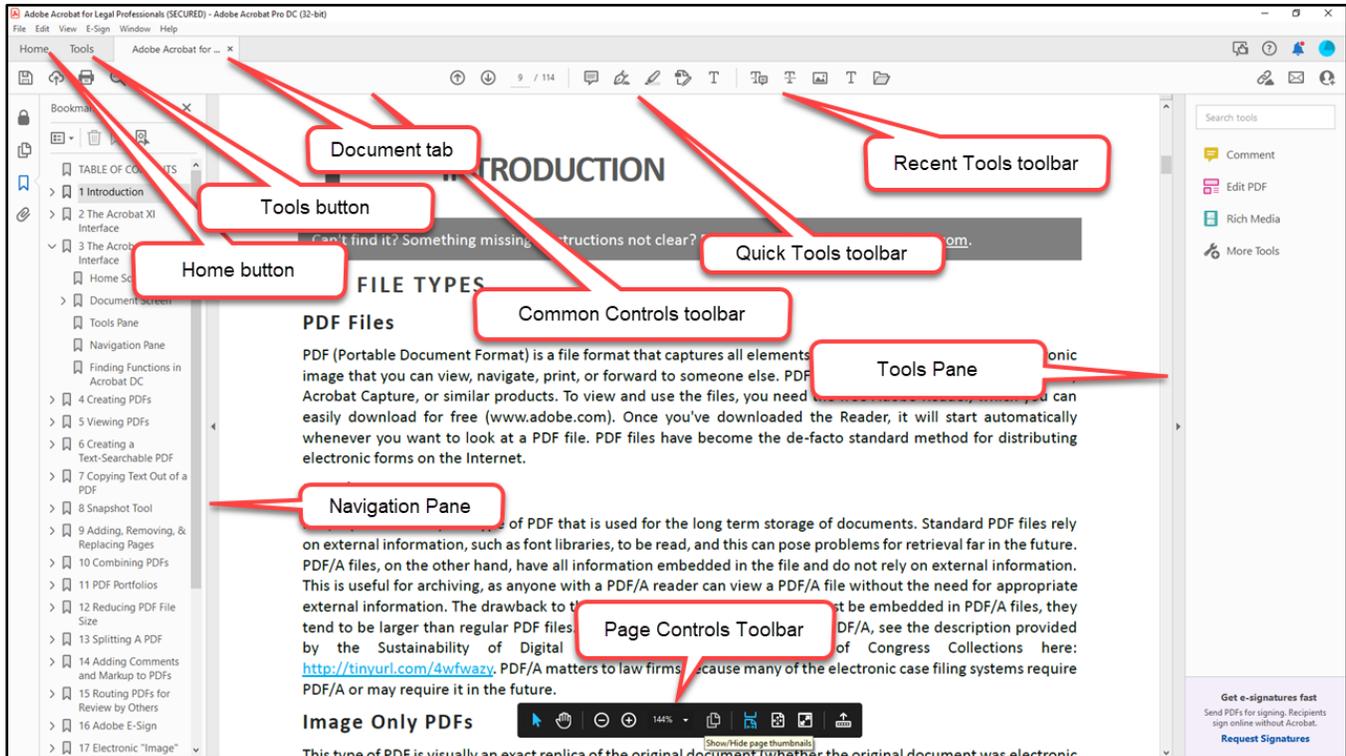


FIGURE 1-1

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.

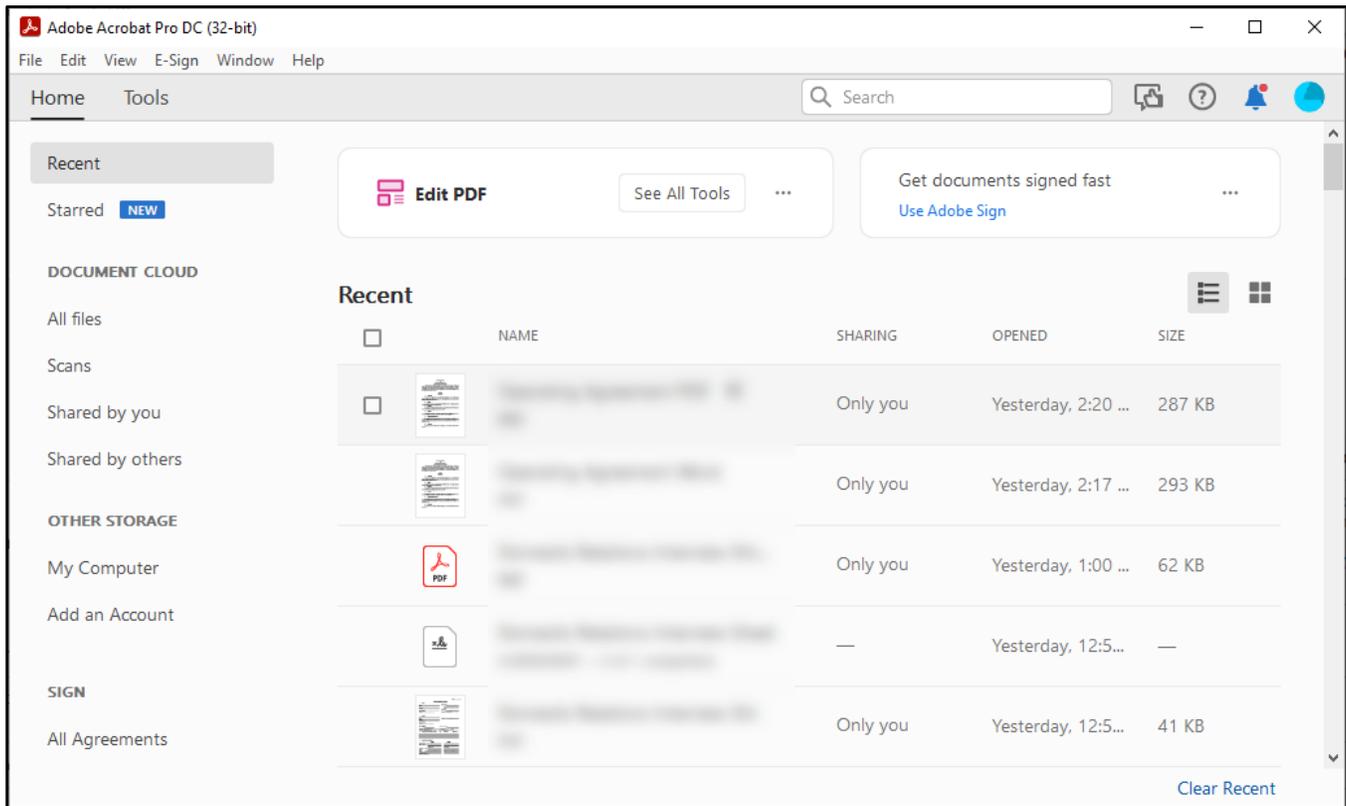


FIGURE 1-2

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.

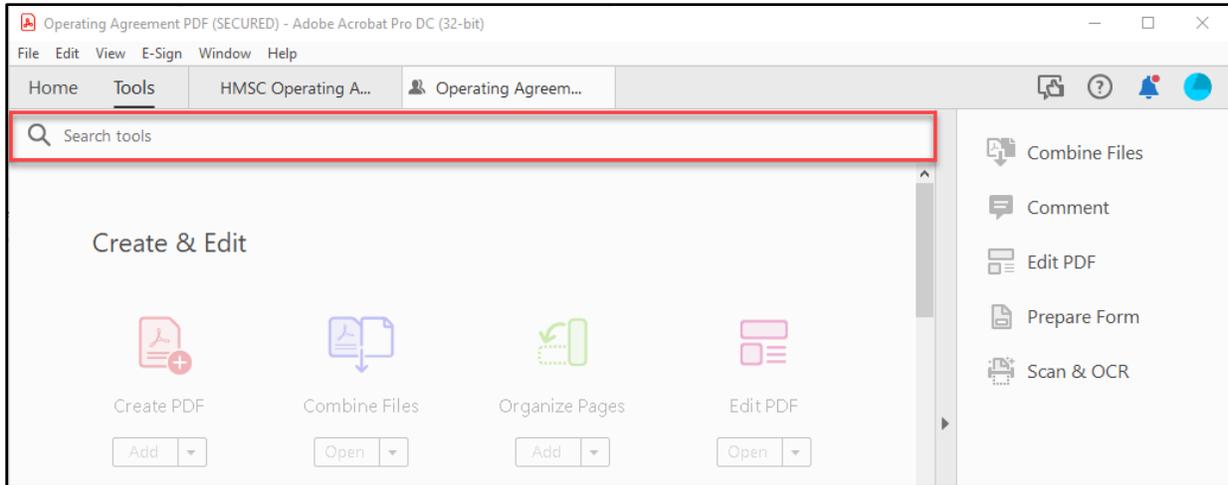


FIGURE 1-3

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.

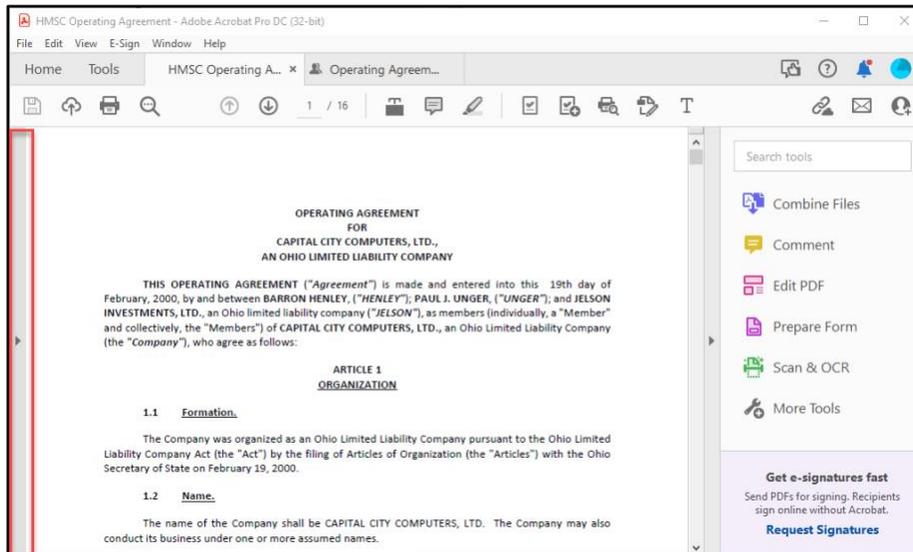


FIGURE 1-4

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.

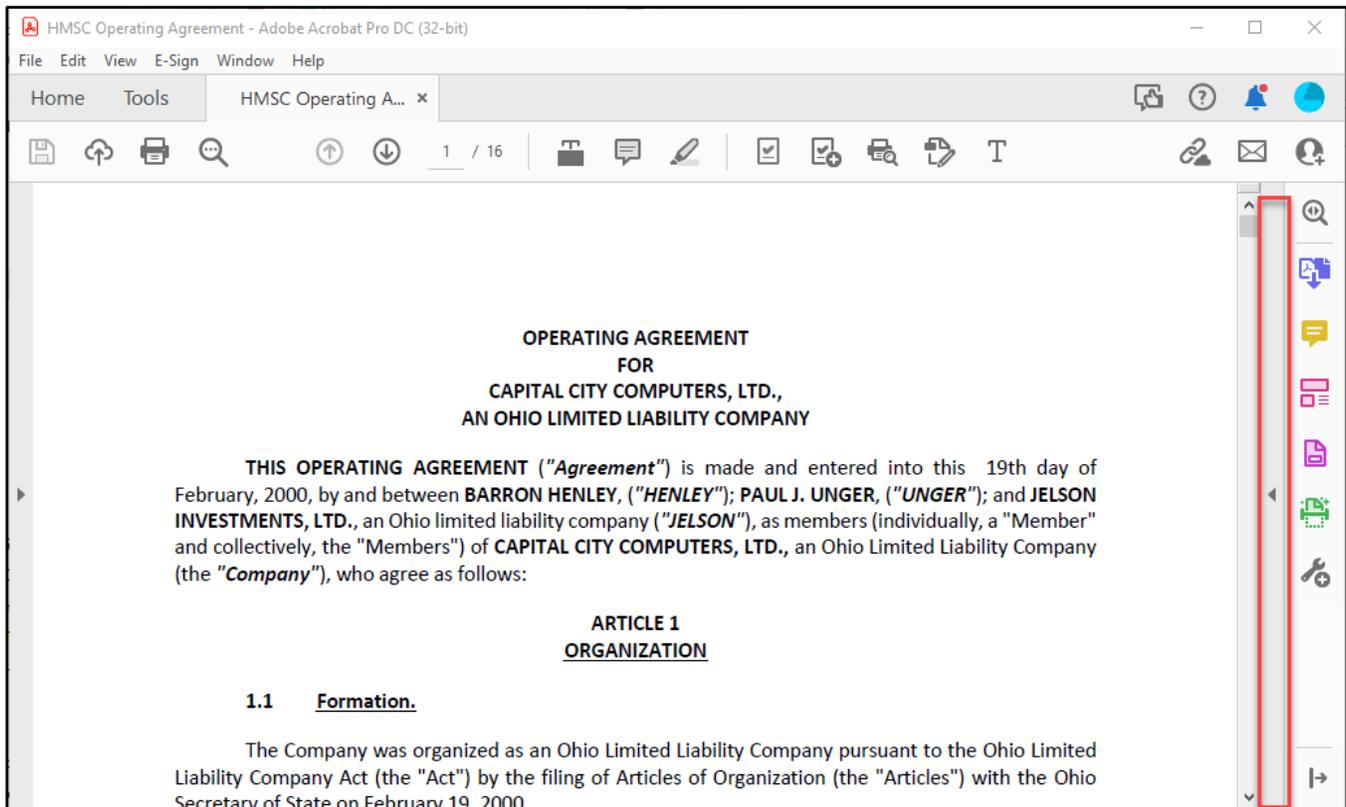


FIGURE 1-5

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.

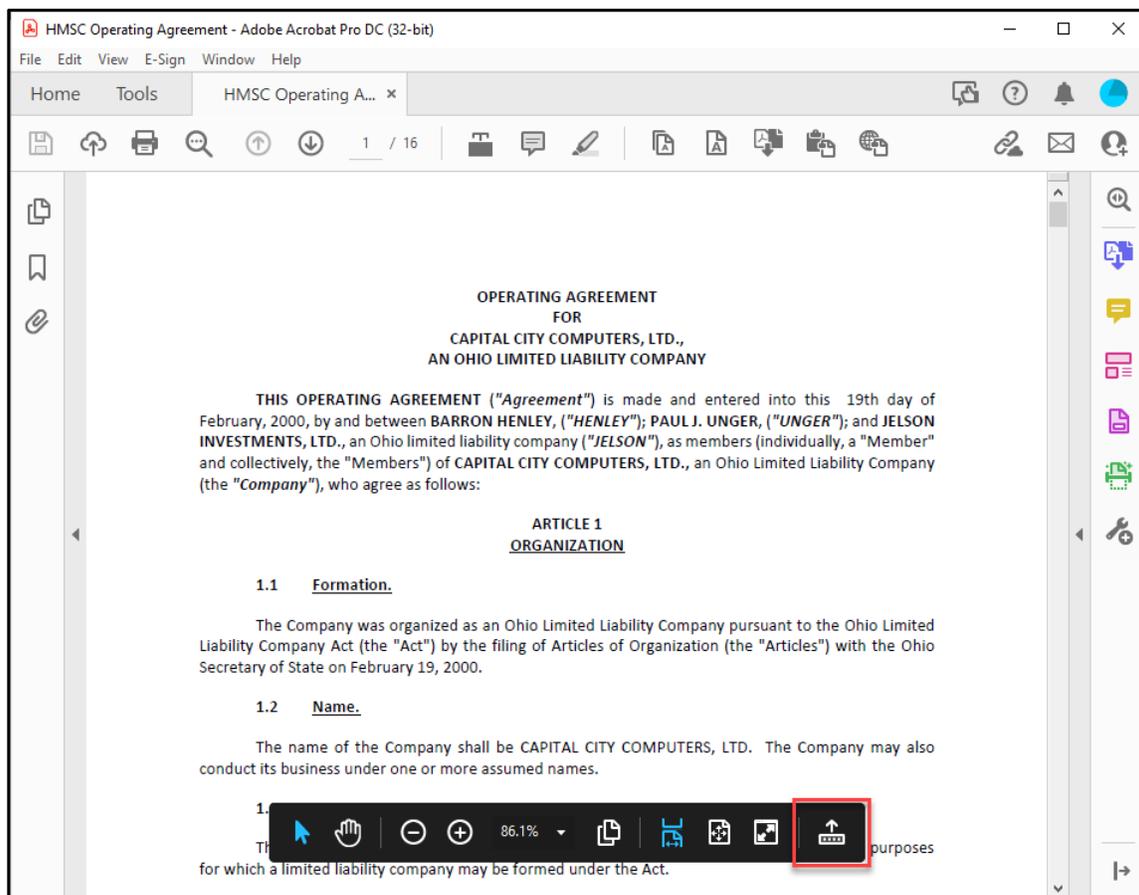


FIGURE 2-1

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...**

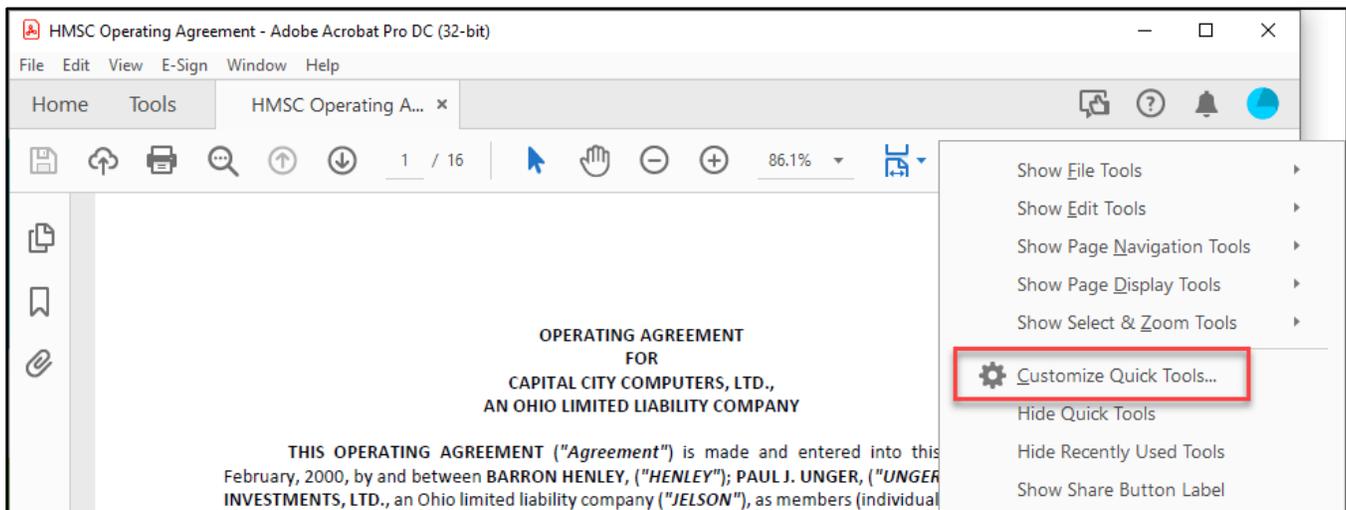


FIGURE 2-3

Adding Tools

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

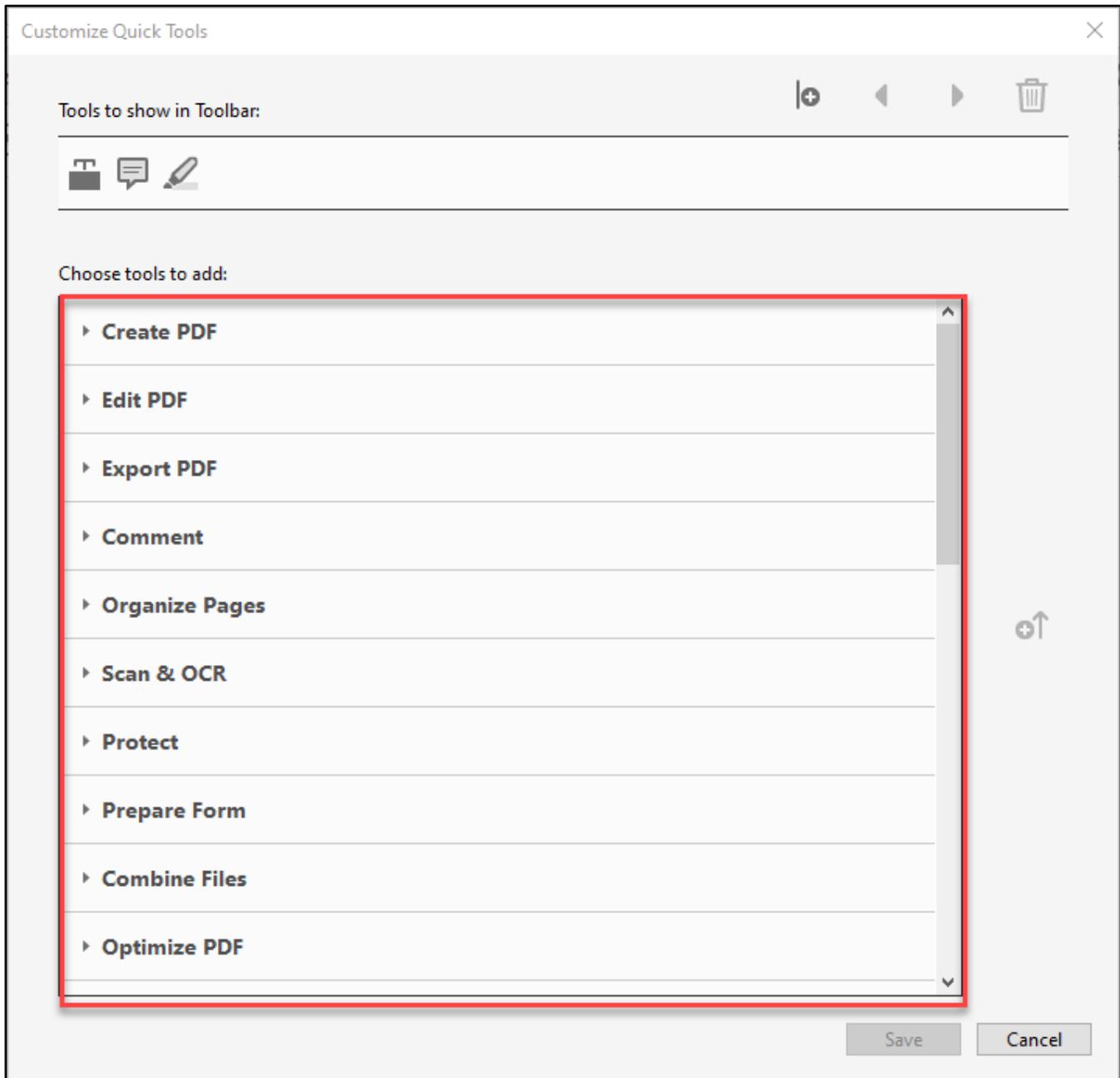


FIGURE 2-4

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

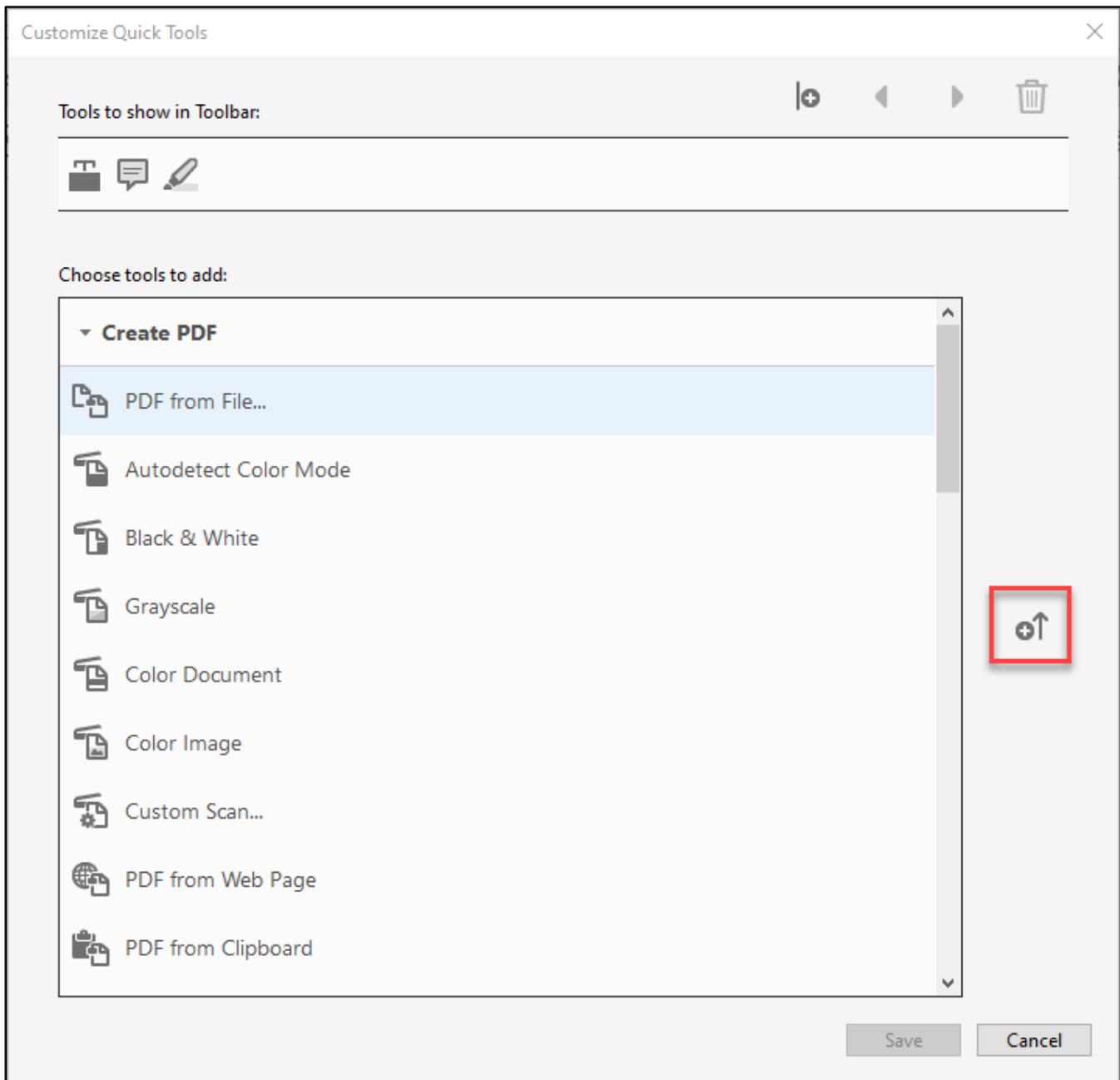


FIGURE 2-5

Reordering Tools

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

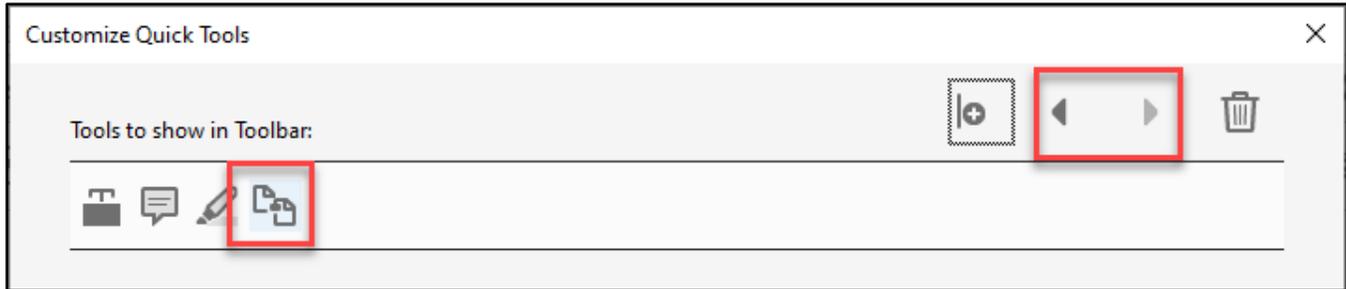


FIGURE 2-6

Removing Tools

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

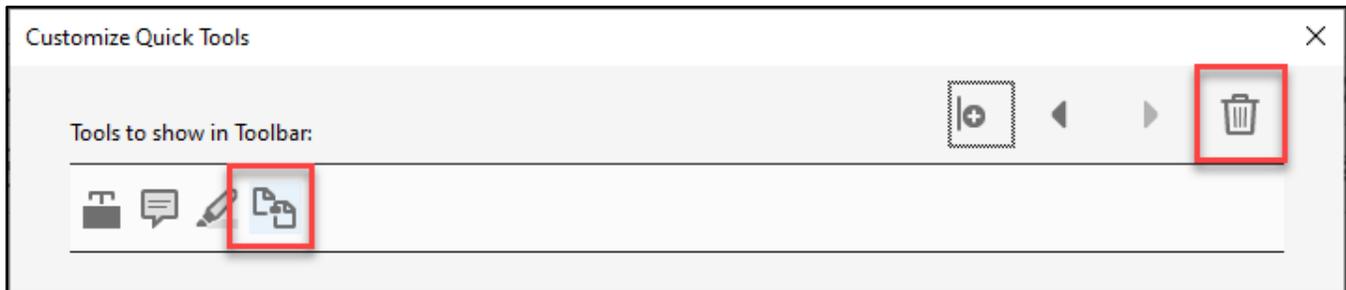


FIGURE 2-7

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.

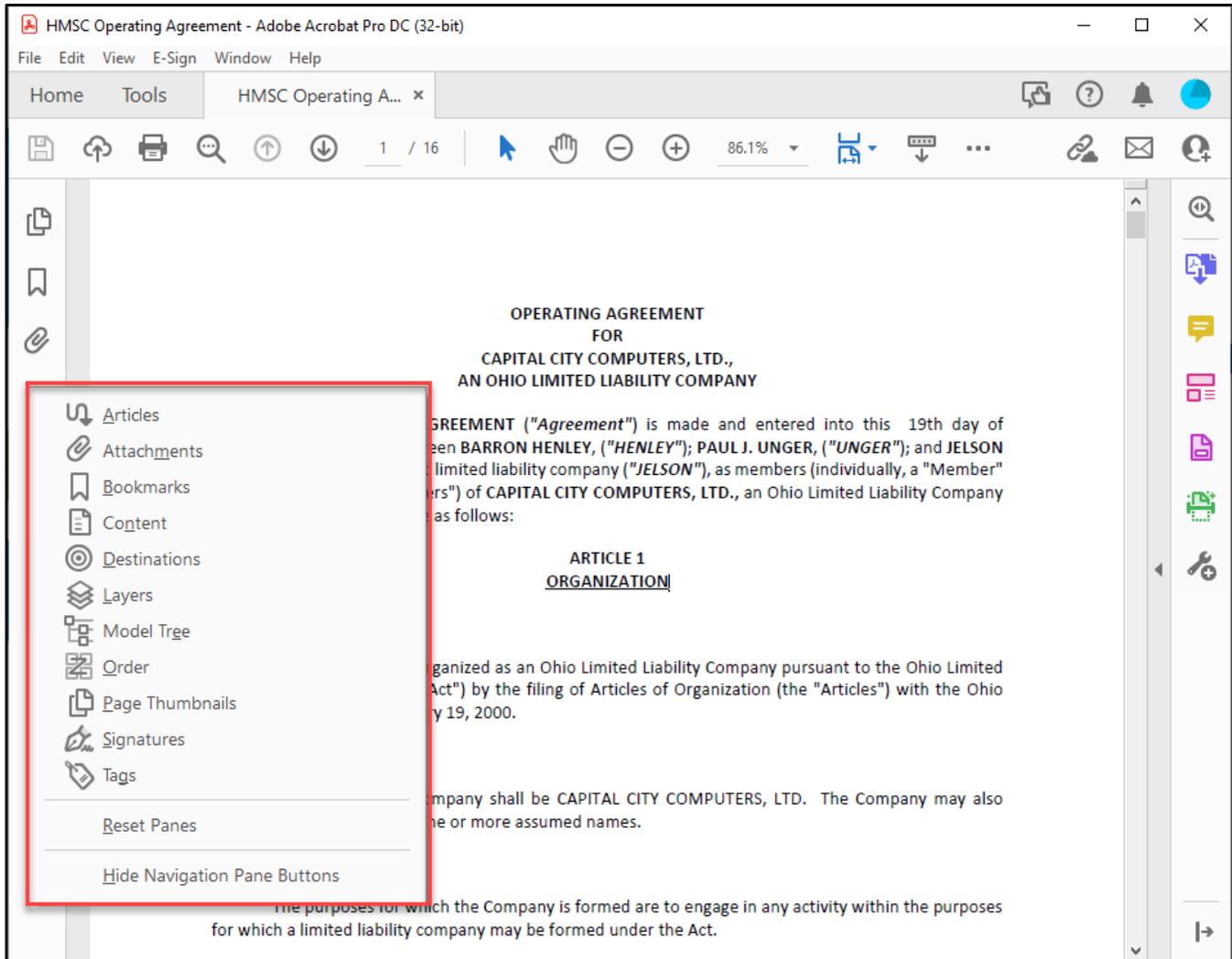


FIGURE 2-9

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**.

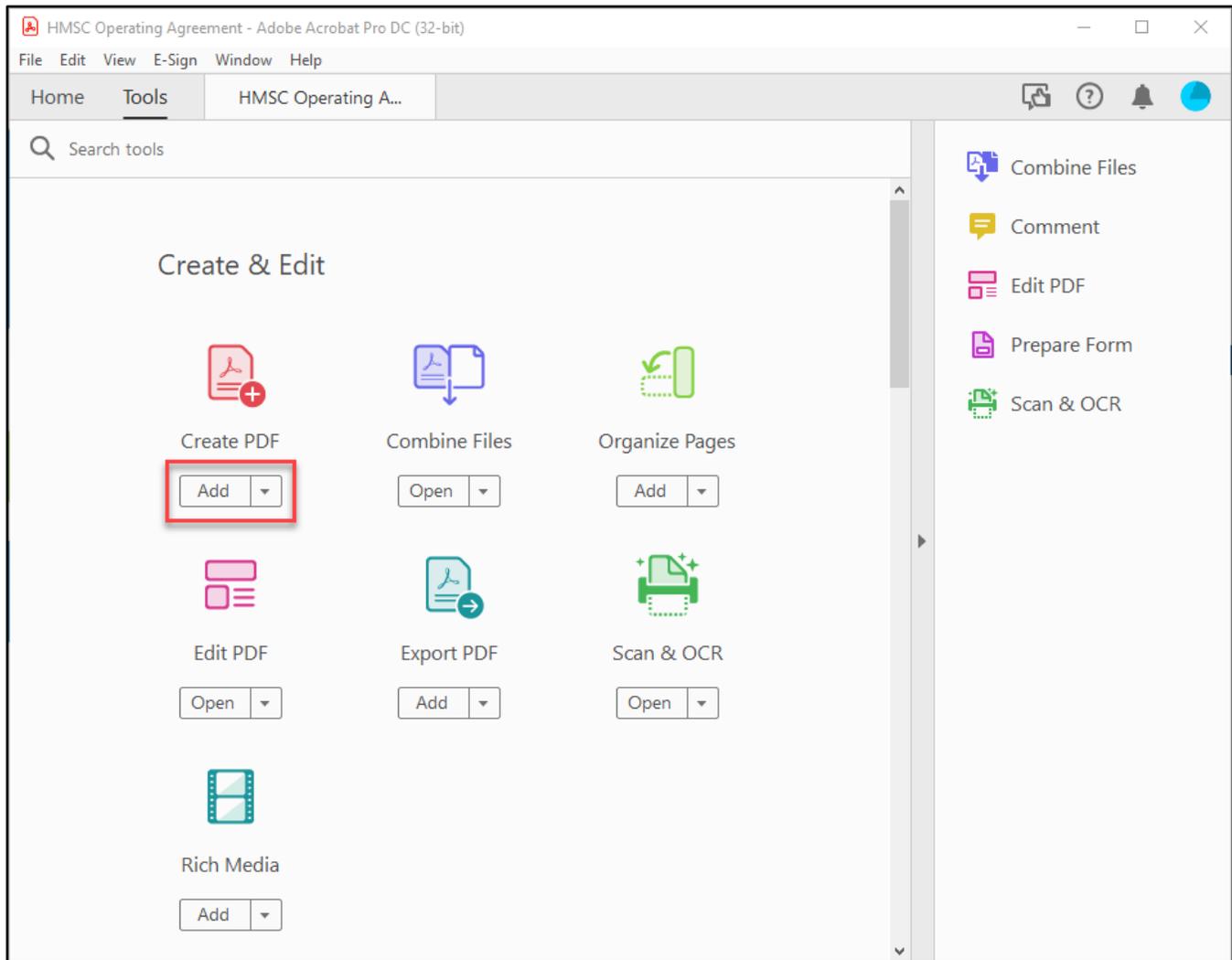


FIGURE 2-10

Reordering Tools

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

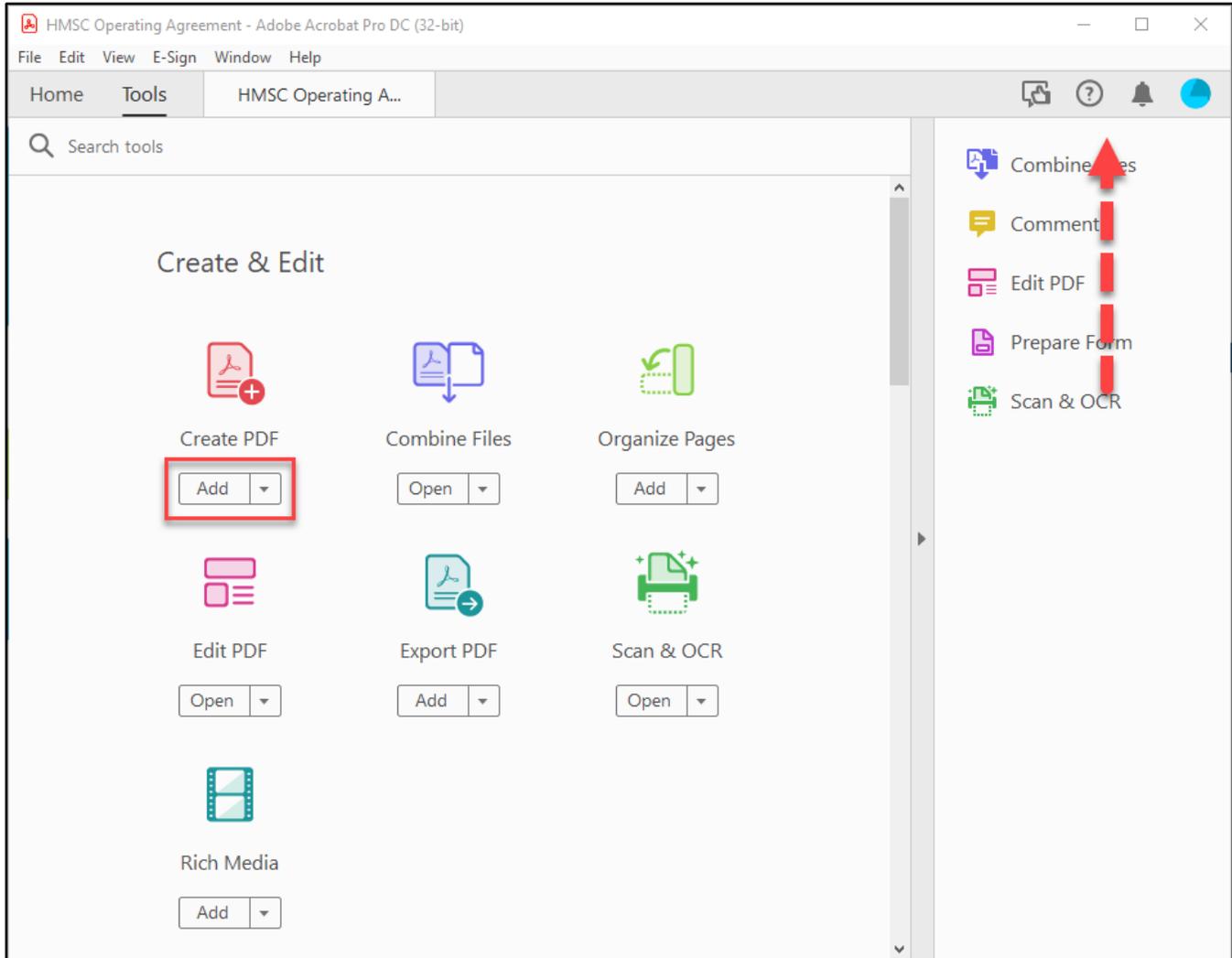


FIGURE 2-11

Removing Tools

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

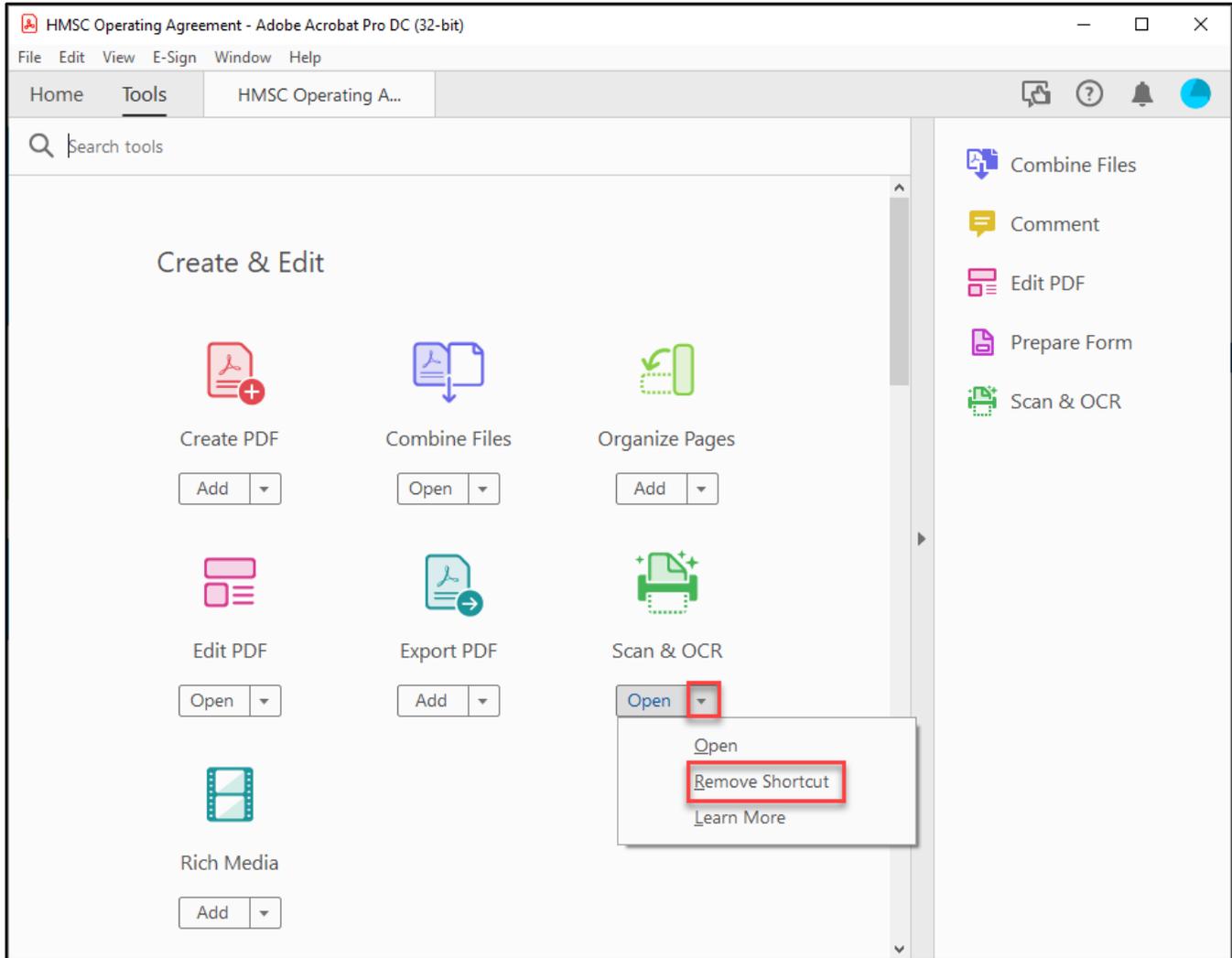


FIGURE 2-12

Toolbars

To customize which tools appear in a particular toolbar:

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

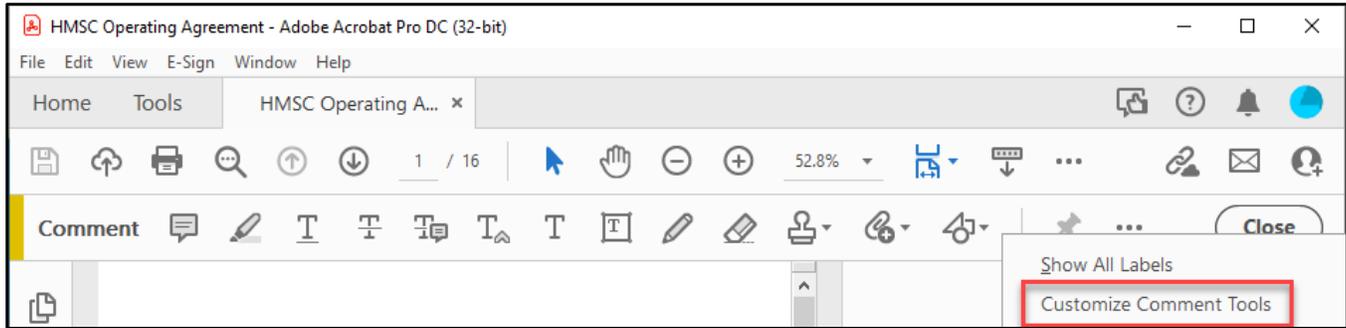


FIGURE 2-13

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

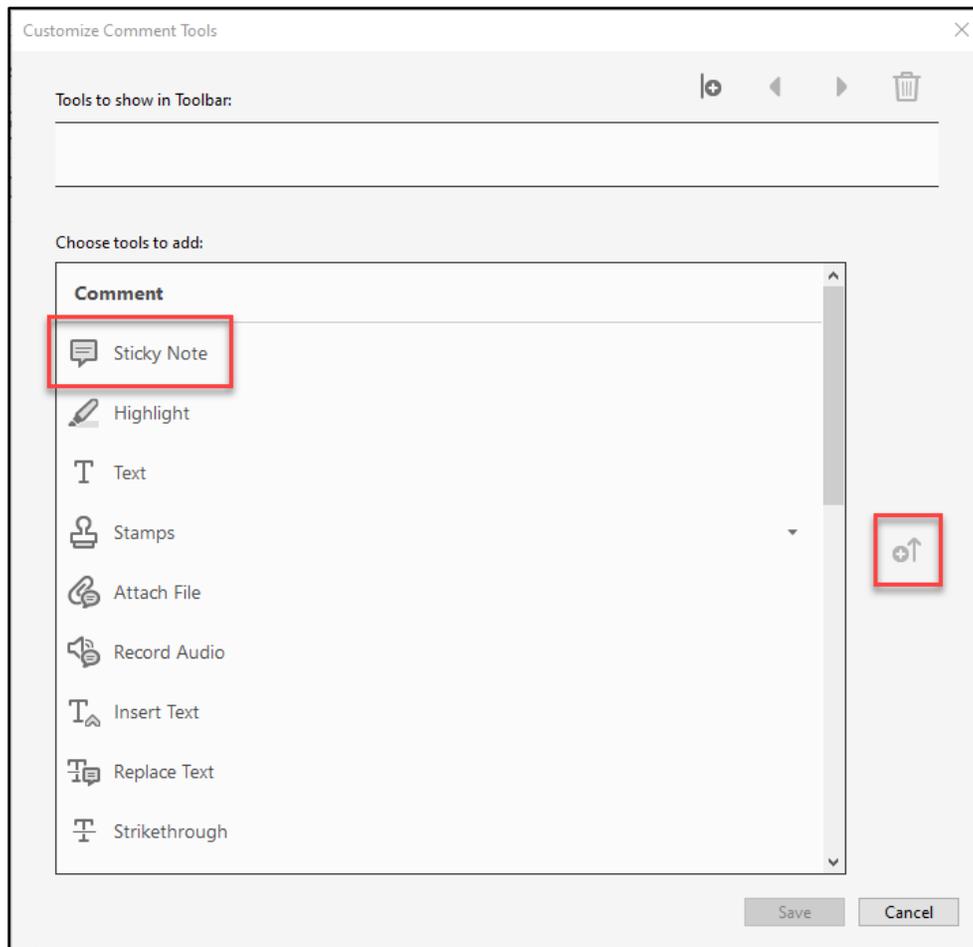


FIGURE 2-14

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

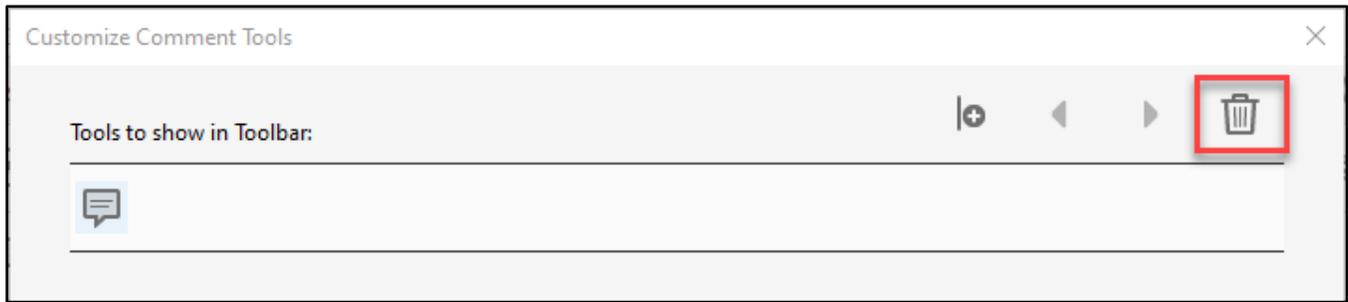


FIGURE 2-15

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



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.

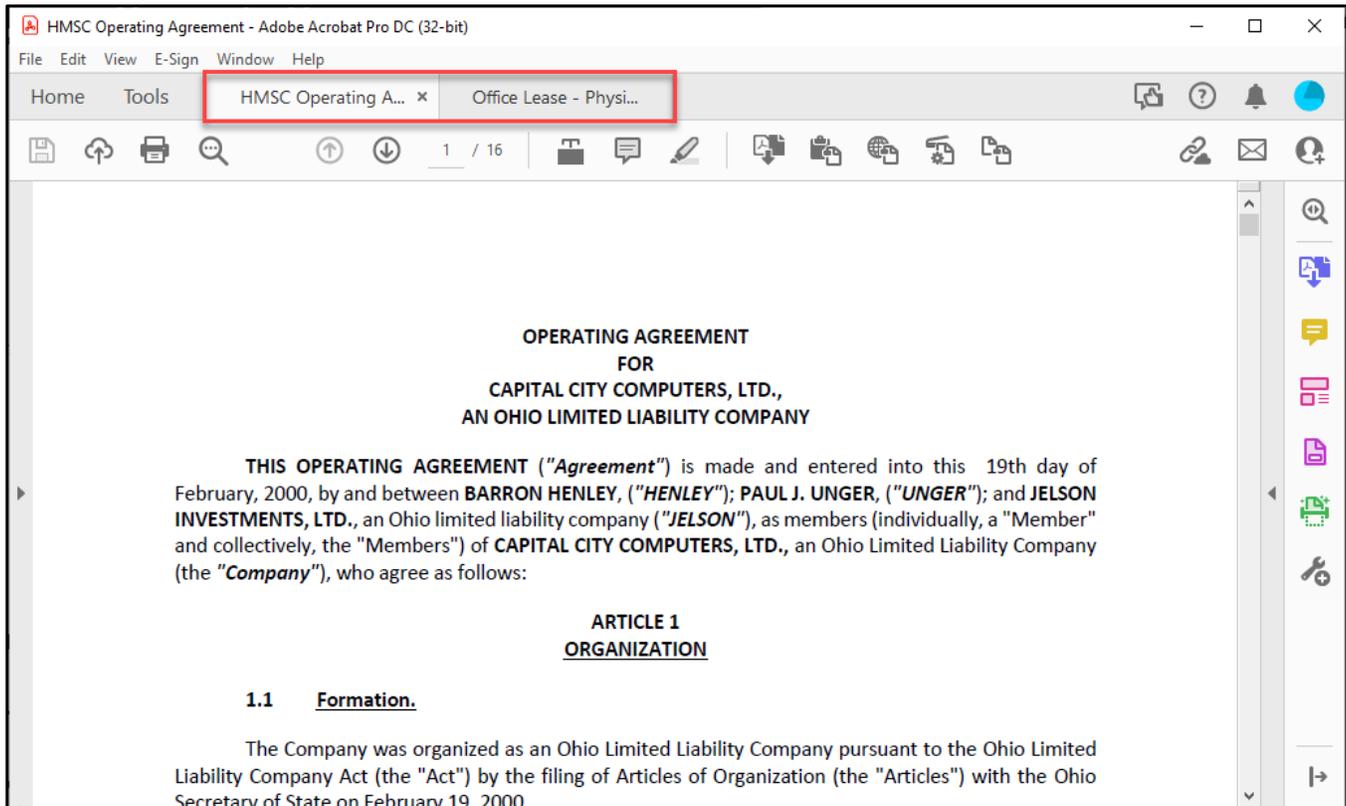


FIGURE 3-1

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.

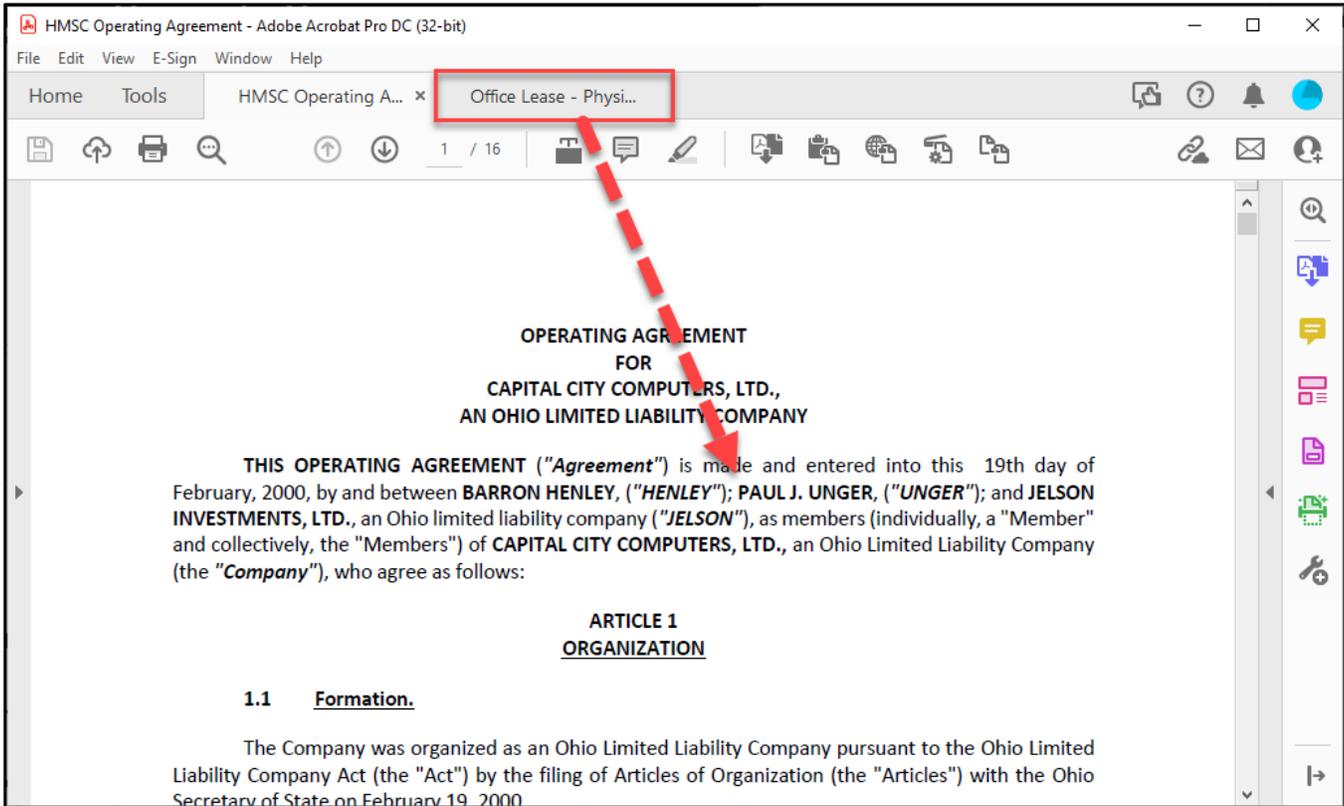


FIGURE 3-2

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.

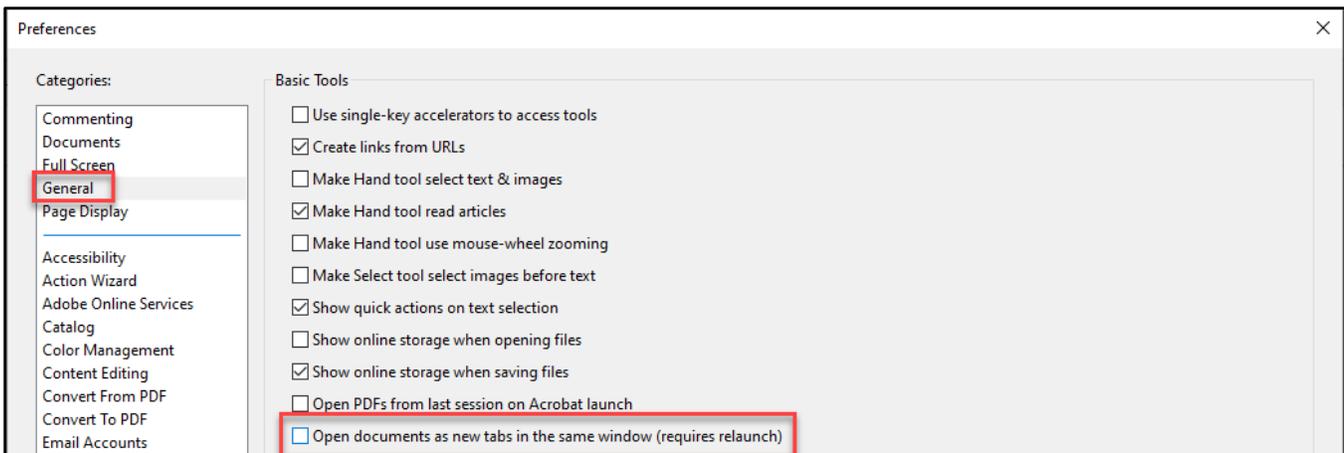


FIGURE 3-3

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 built-in 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**.

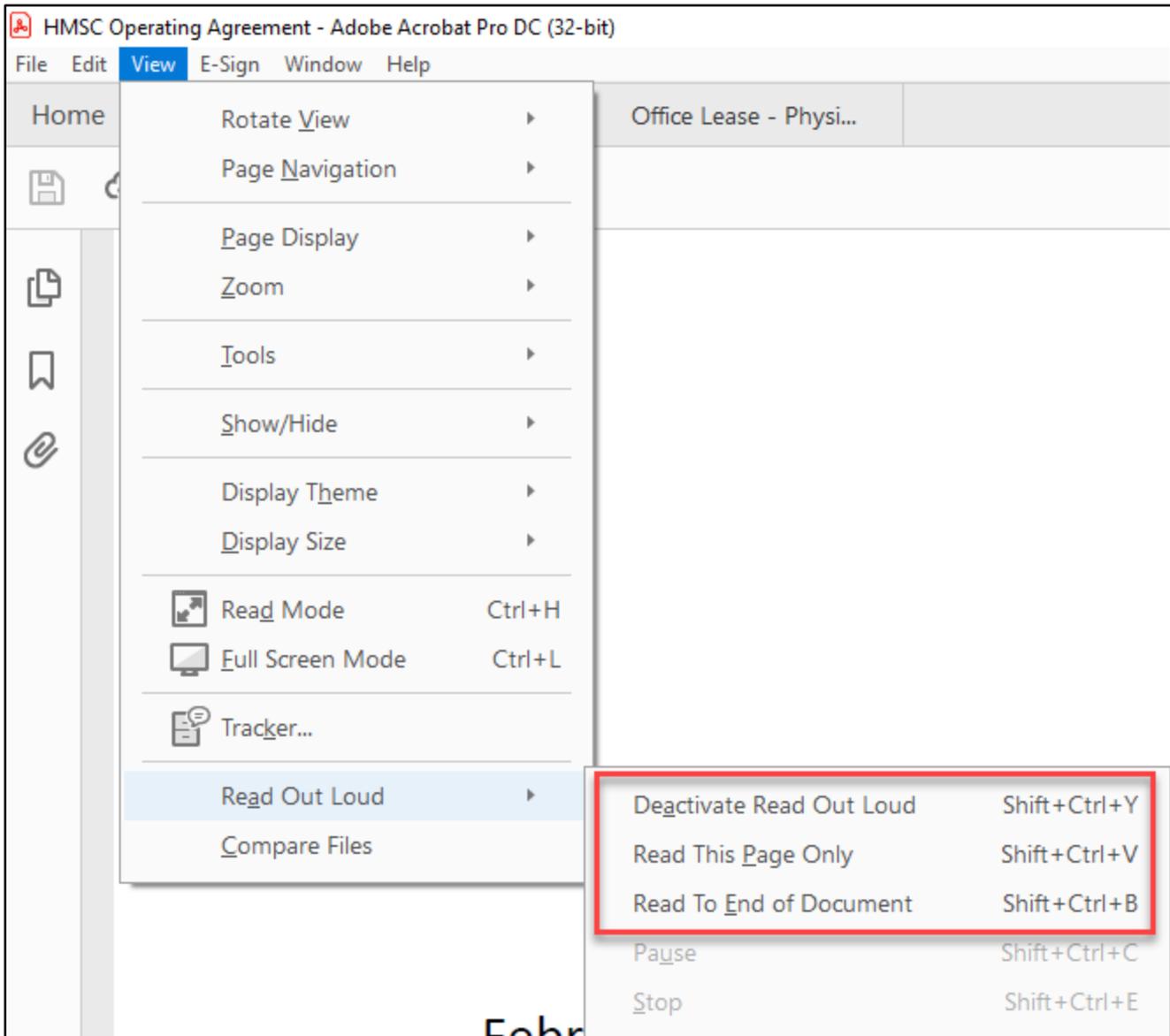


FIGURE 3-4

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**.

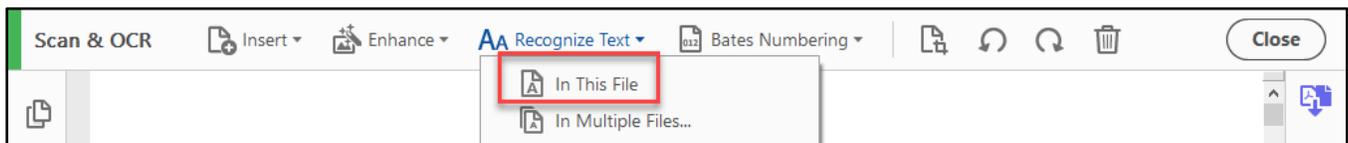


FIGURE 4-1

4. Click on  **Settings**.

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

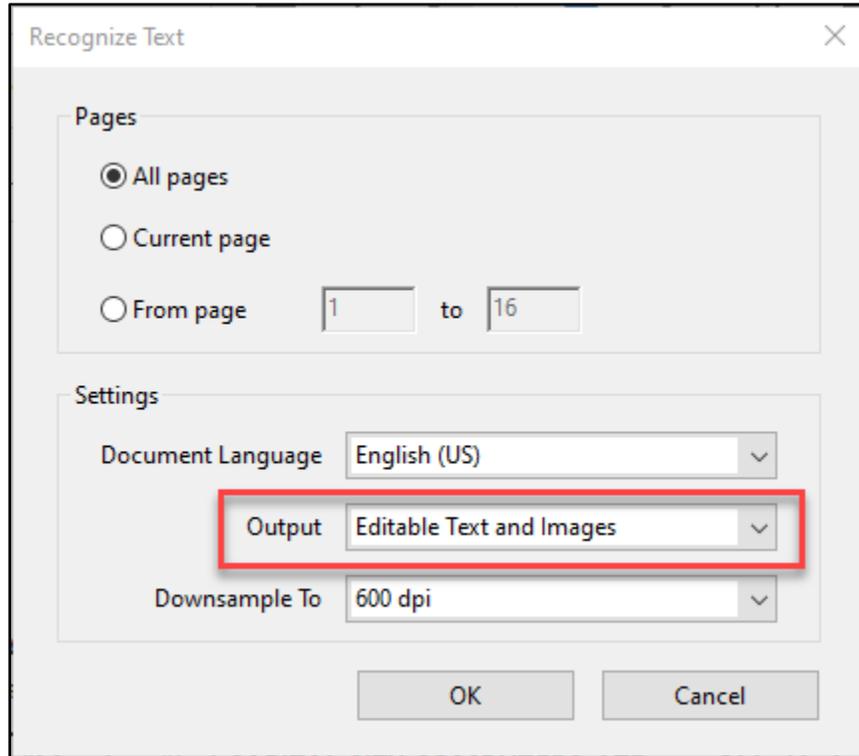


FIGURE 4-2

- Click on **Recognize Text**.

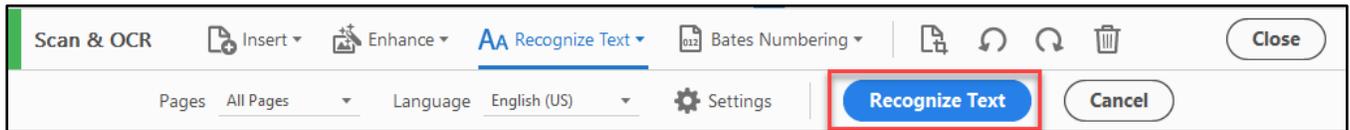


FIGURE 4-3

Batch Processing

You can OCR multiple PDF files at once.

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

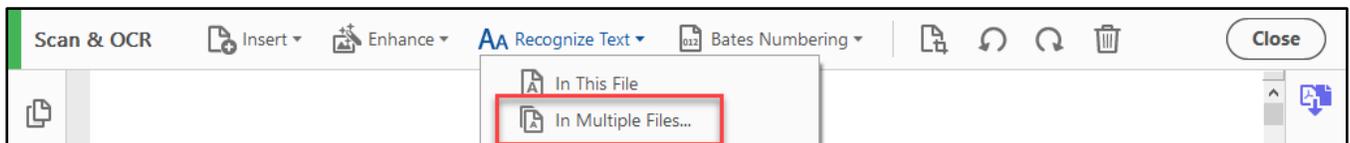


FIGURE 4-4

4. Click on **Add Files...** to select the files to be OCR'd.

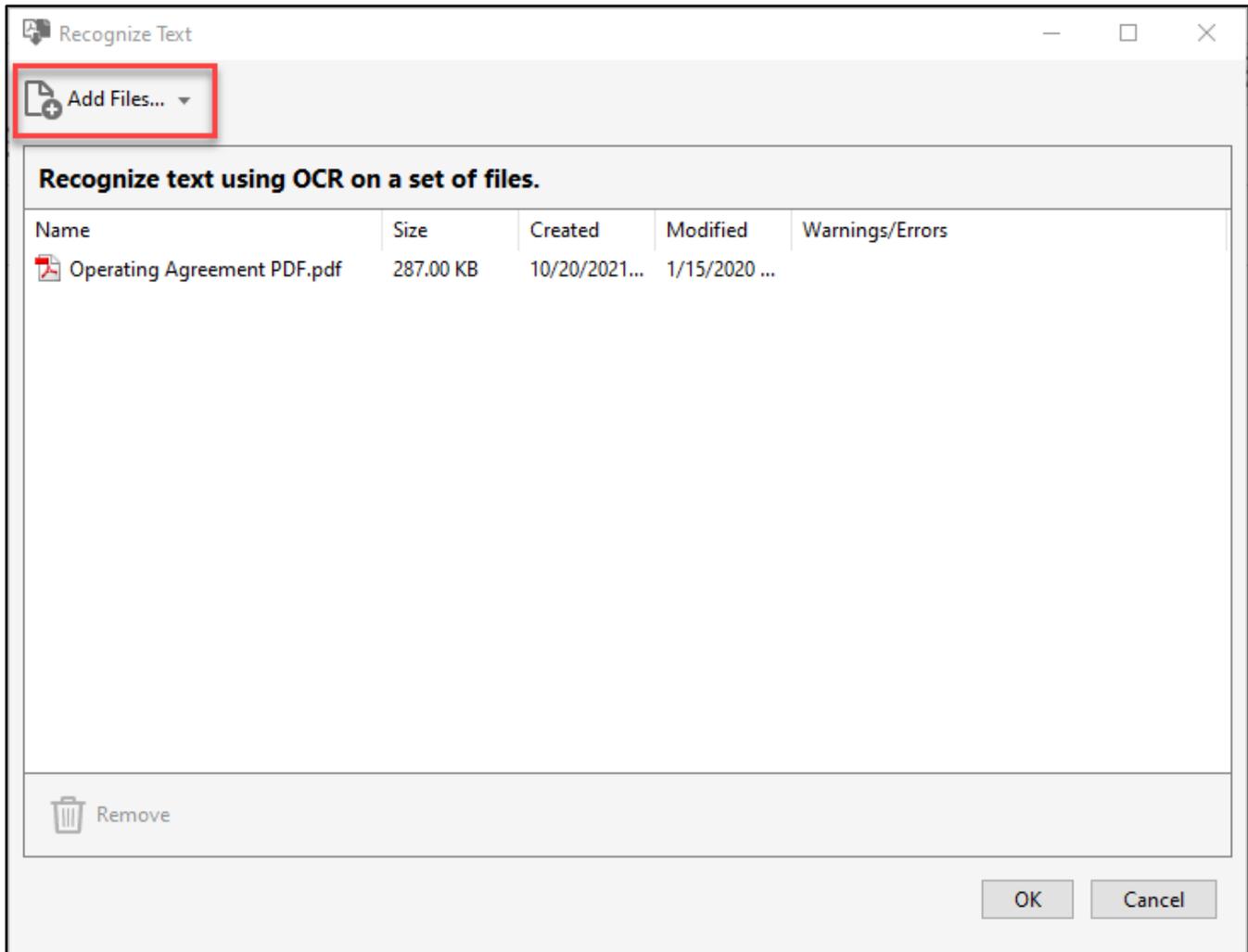


FIGURE 4-5

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

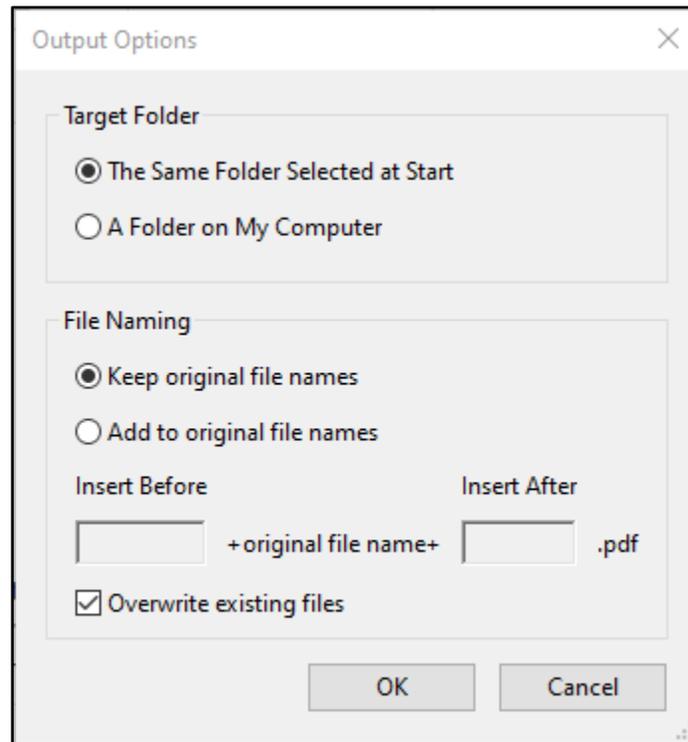


FIGURE 4-6

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%.

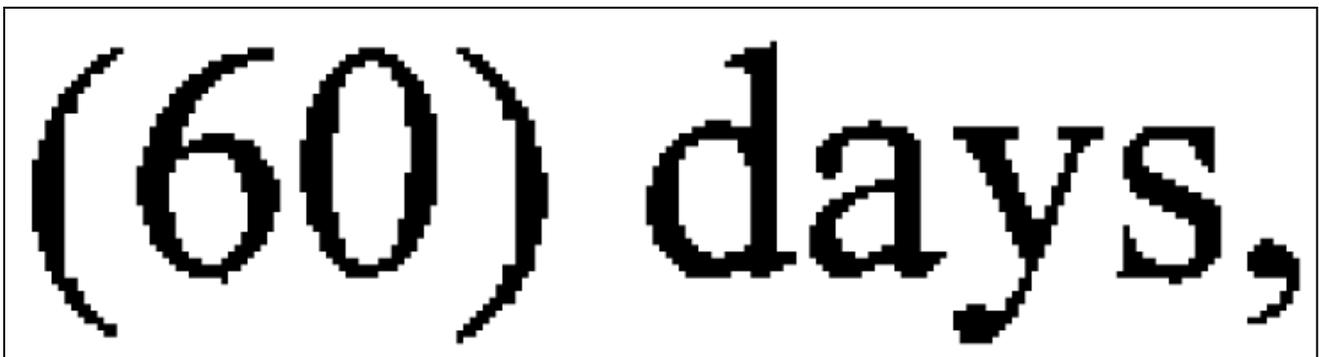


FIGURE 4-7

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.



FIGURE 5-1

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

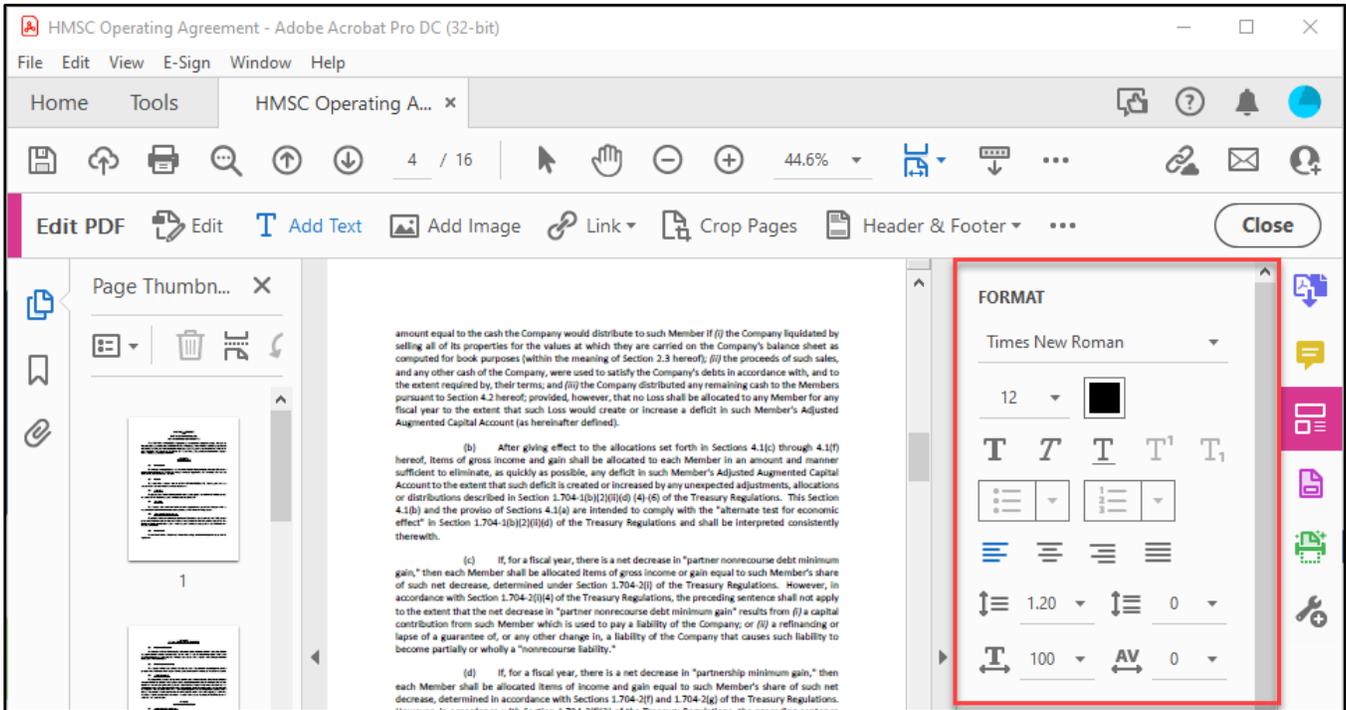


FIGURE 5-2

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**.

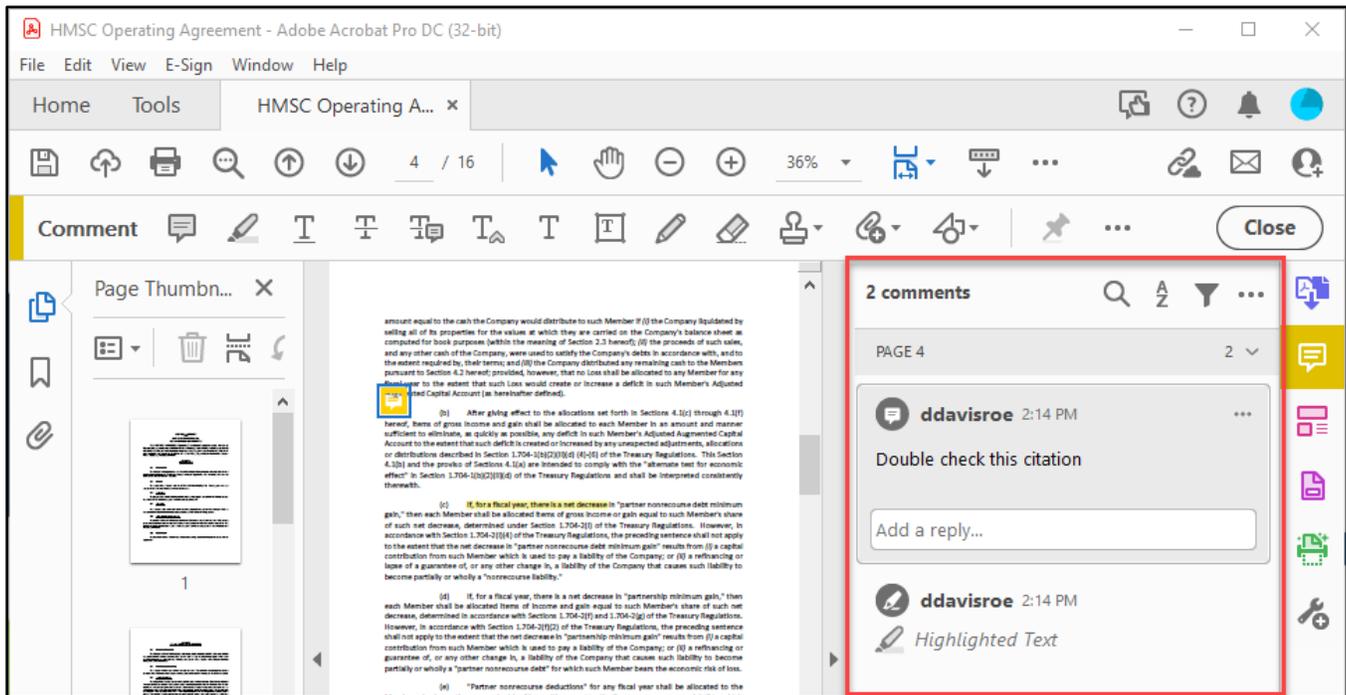


FIGURE 5-5

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).

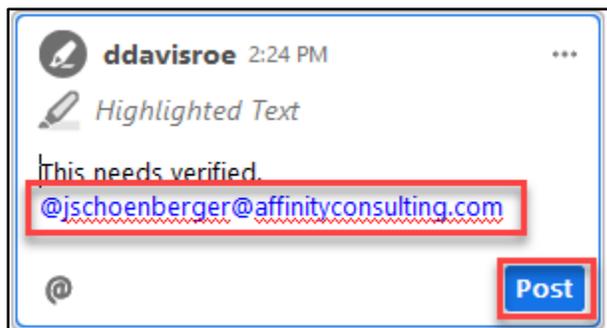


FIGURE 5-6

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.

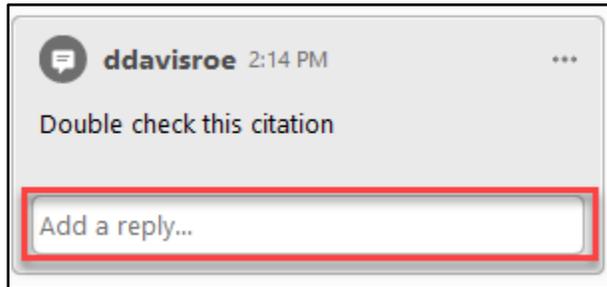


FIGURE 5-7

Deleting Comments

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

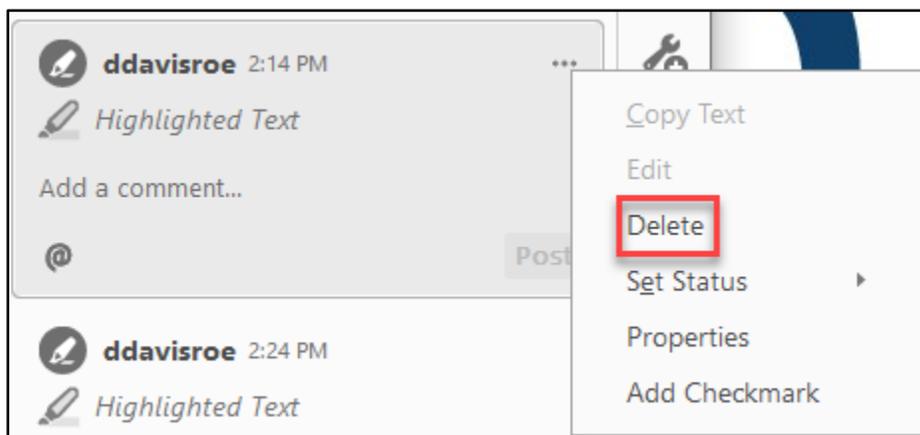


FIGURE 5-8

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**.

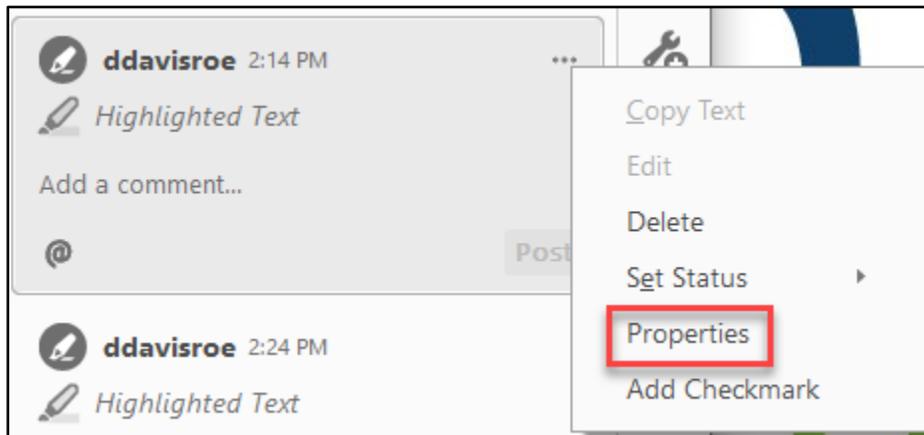


FIGURE 5-9

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.

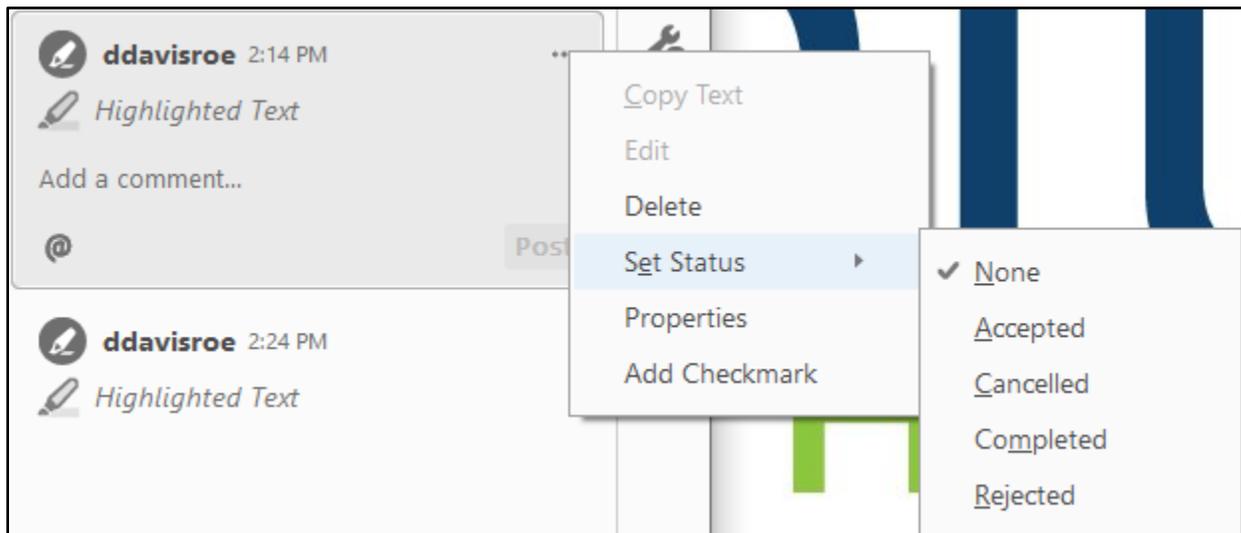


FIGURE 5-10

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.



FIGURE 5-11

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**.

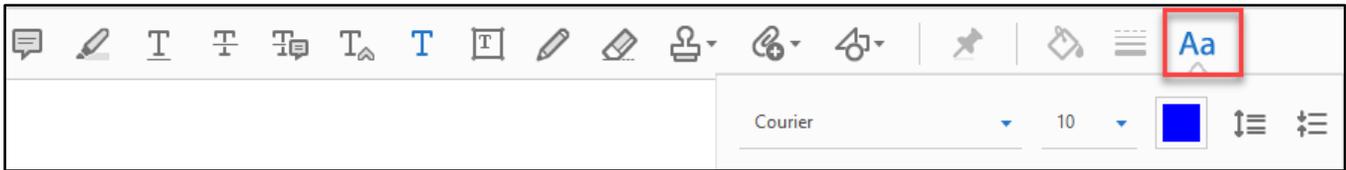


FIGURE 5-12

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**.

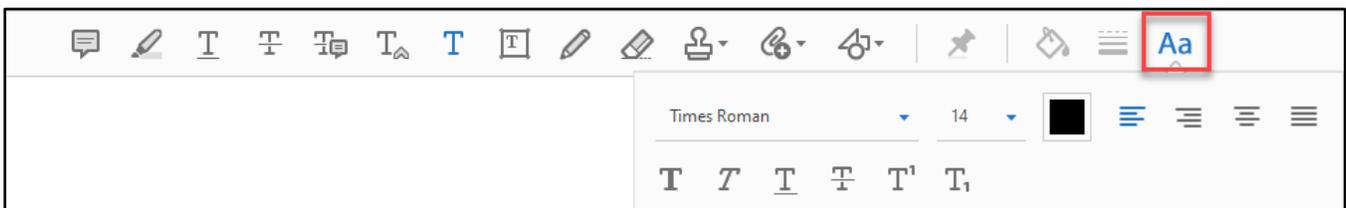


FIGURE 5-14

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

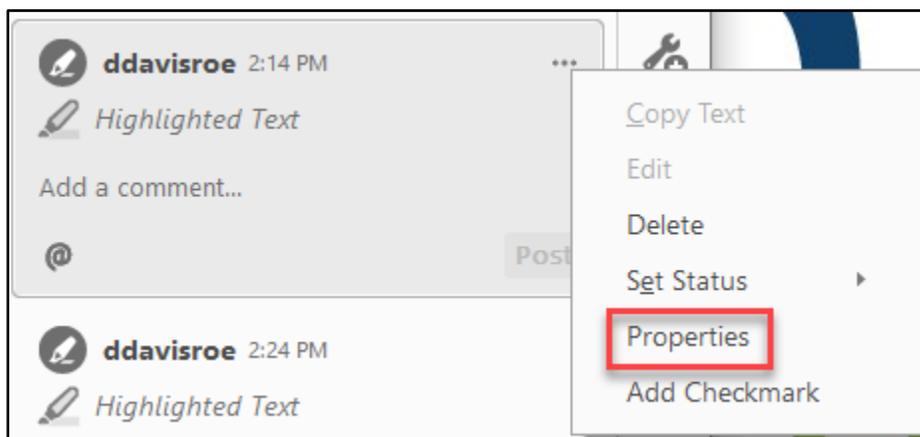


FIGURE 5-15

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.



FIGURE 5-16

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**.

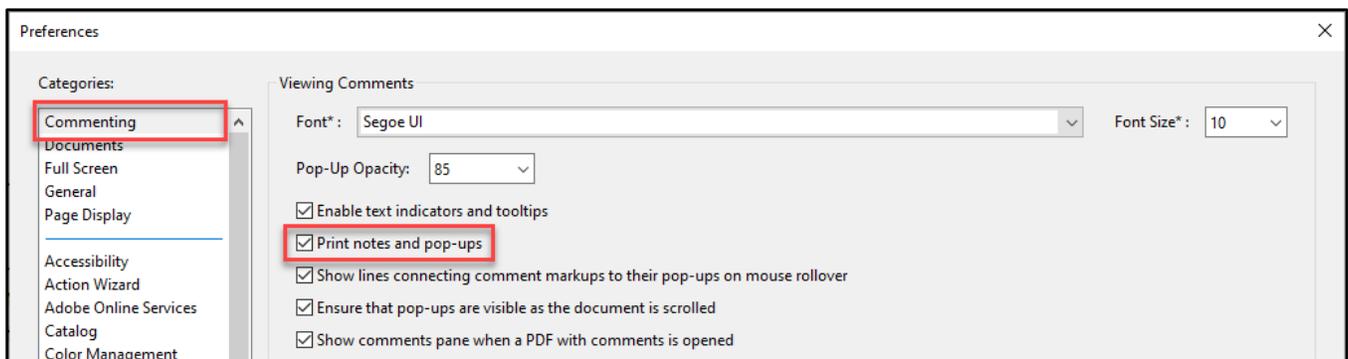


FIGURE 5-17

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

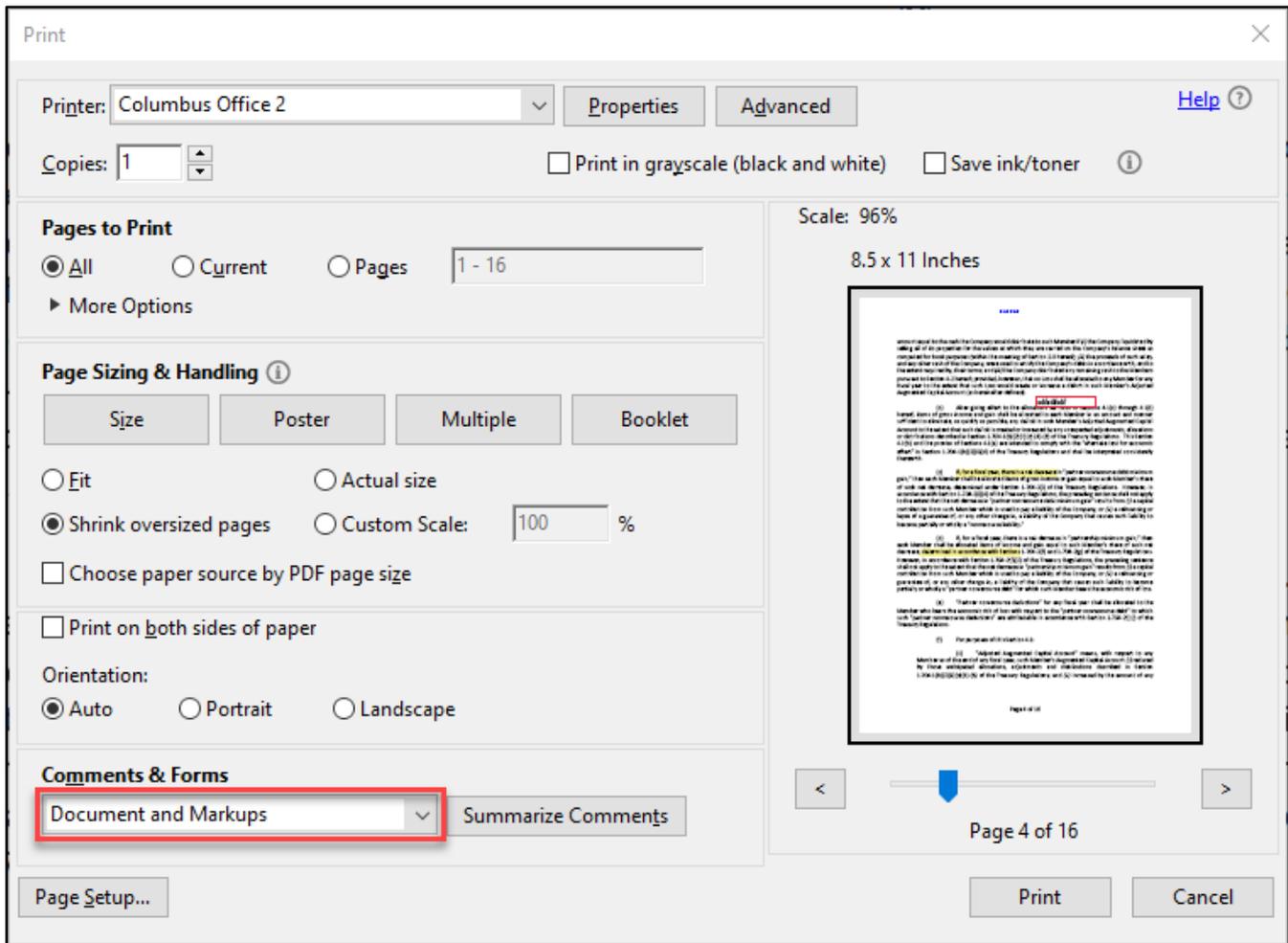


FIGURE 5-18

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...**

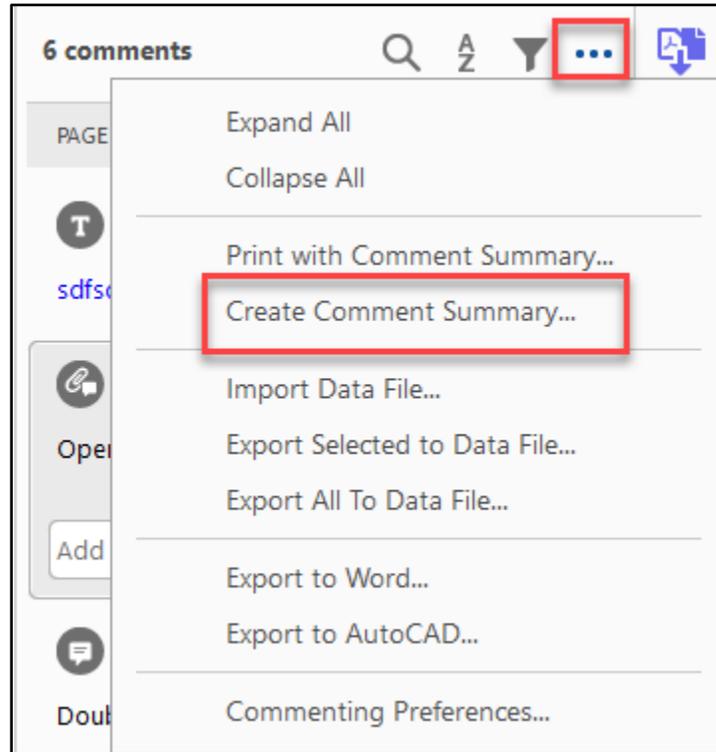


FIGURE 5-19

Filtering Annotations

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

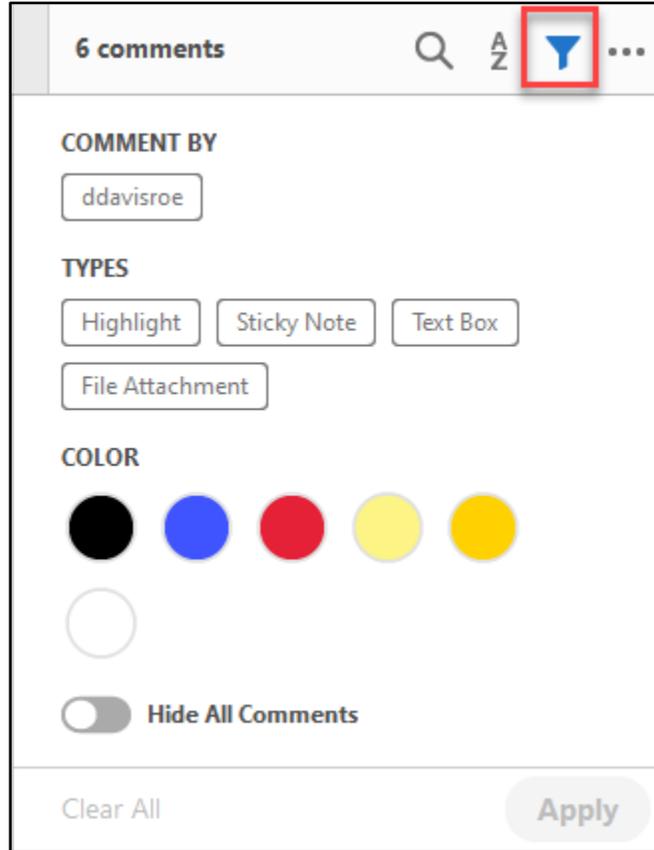


FIGURE 5-20

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.

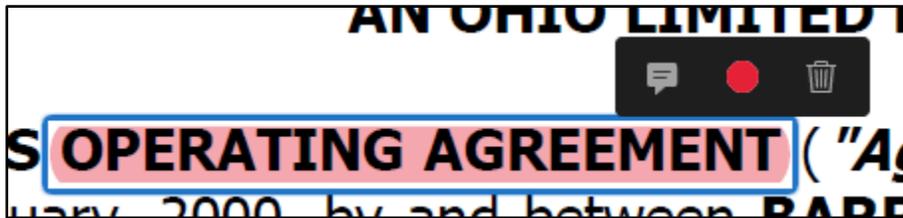


FIGURE 5-21

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.

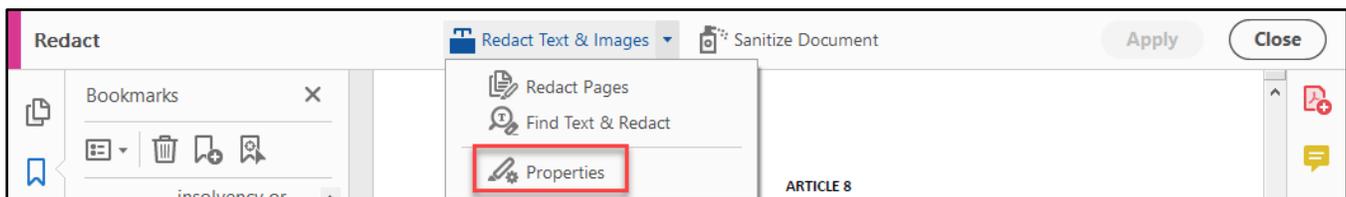


FIGURE 6-2

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.**

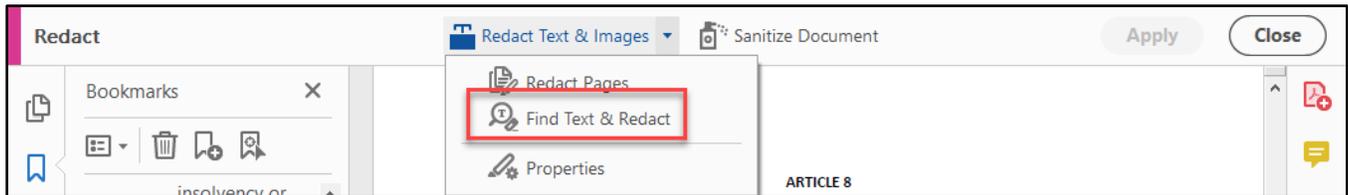


FIGURE 6-3

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

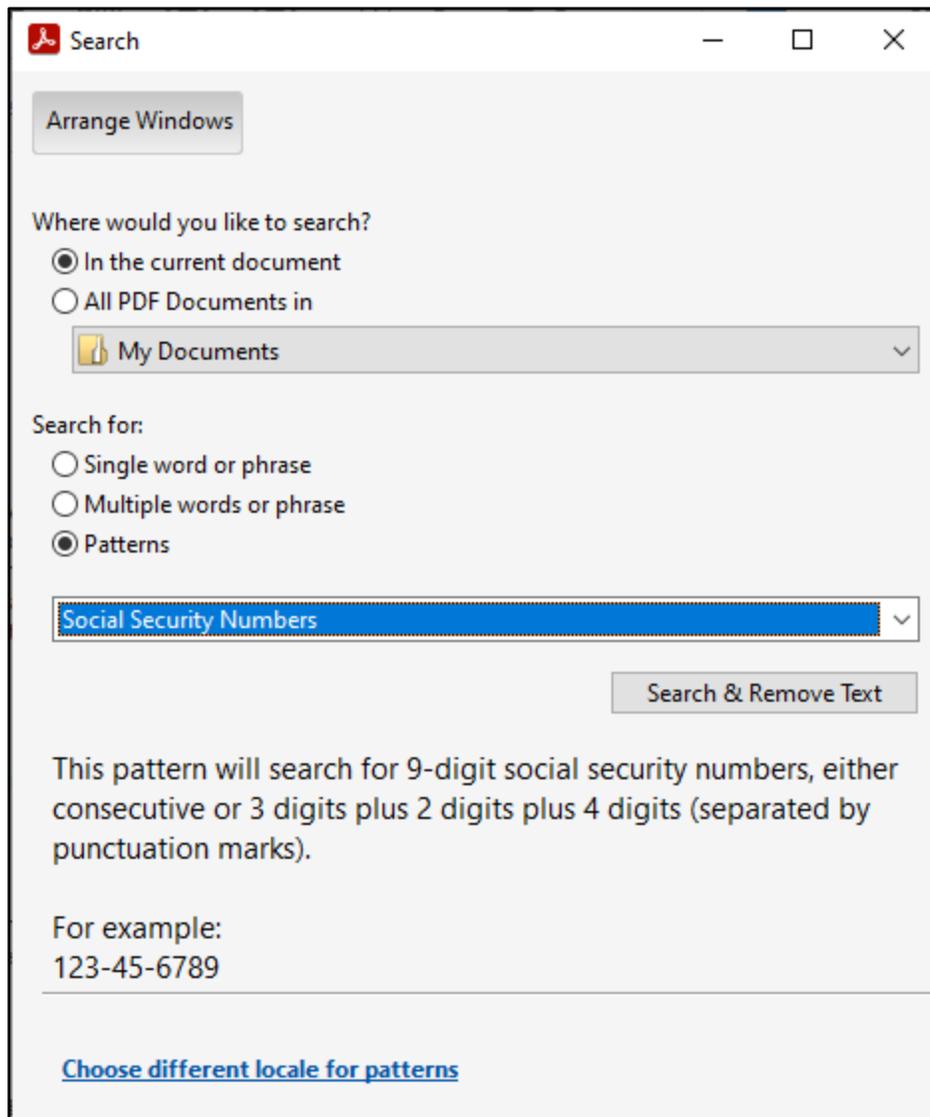


FIGURE 6-4

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**.

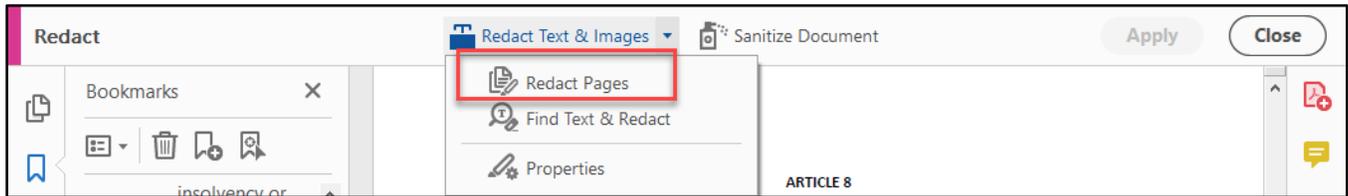


FIGURE 6-5

Step 5: Apply Redactions

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

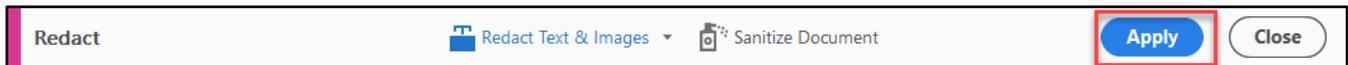


FIGURE 6-6

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.



FIGURE 7-1

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

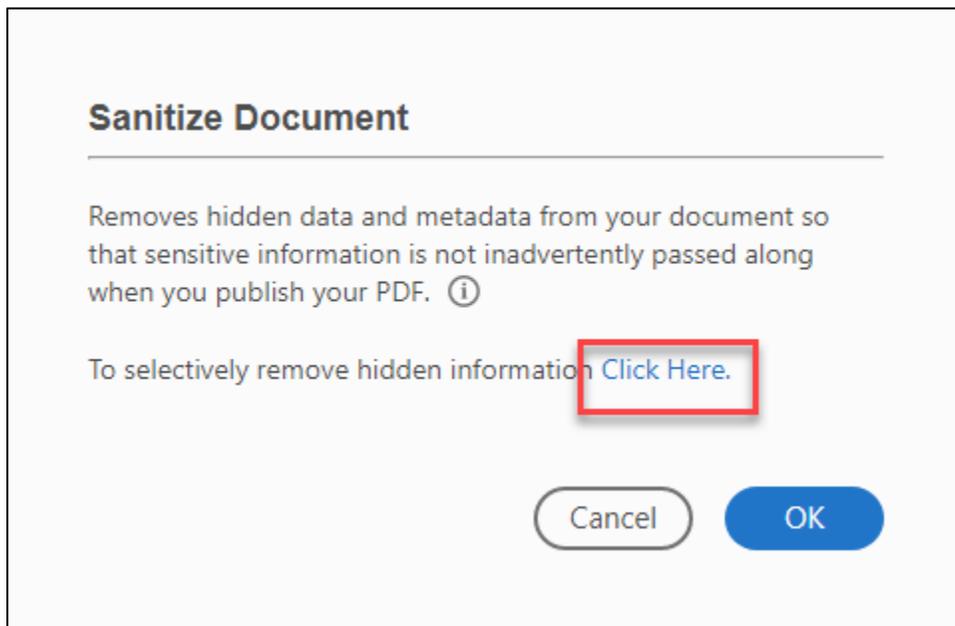


FIGURE 7-2

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

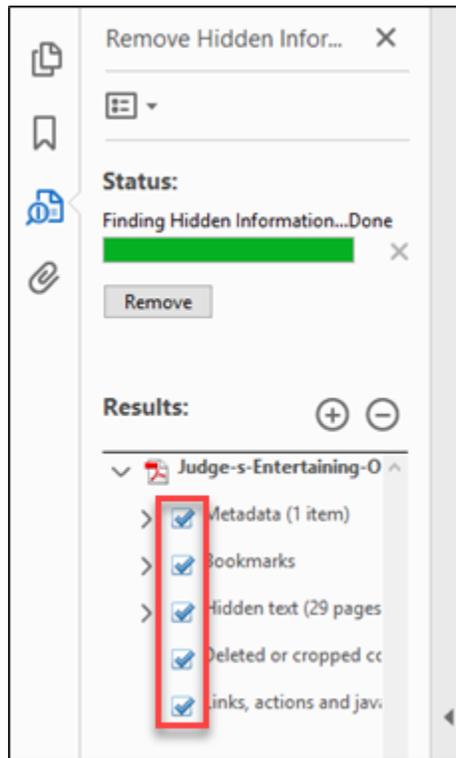


FIGURE 7-3

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



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