**Affinity**
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MICROSOFT WORD & PDFS
# WHAT YOU NEED TO KNOW TO PROPERLY PREPARE A DOCUMENT FOR E-FILING

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SMART BUSINESS STRATEGIES FOR THE LEGAL WORLD.

# CHAPTER 4
# CREATING PDFS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

## What Can Be Converted to A PDF

If you have the right hardware and software, you can create PDFs from just about anything, including electronic files (Word, WordPerfect, PowerPoint, Excel, etc.), paper documents, web pages, email, and even something you've copied to your computer's clipboard.

## Microsoft Word Integration

Using the Acrobat Ribbon or buttons in Microsoft Word is superior to using a print driver to create PDFs because you can automatically create hyperlinks and bookmarks in your PDF based on styles, cross references, and tables of contents. See Chapter 18 for more information about links and bookmarks.

You can also create hyperlinks and bookmarks with the **Export - Create PDF/XPS button**, but you have less control over when they are created.

### Acrobat Ribbon

#### Creating PDFs from Acrobat Ribbon

From the Word document that you wish you convert to a PDF:
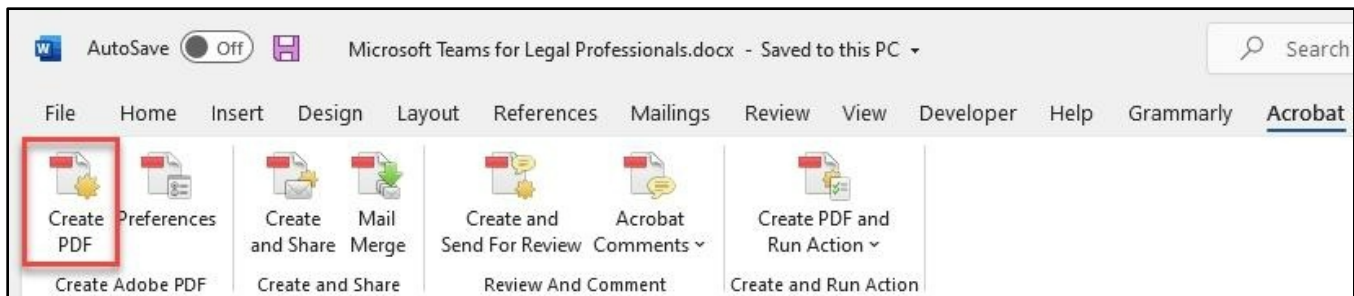
1.  Click on **Create PDF** on the **Acrobat ribbon**.



FIGURE 4-1

2.  Click on the **Options button** to create a PDF/A file *or* create bookmarks based on styles or Word bookmarks.
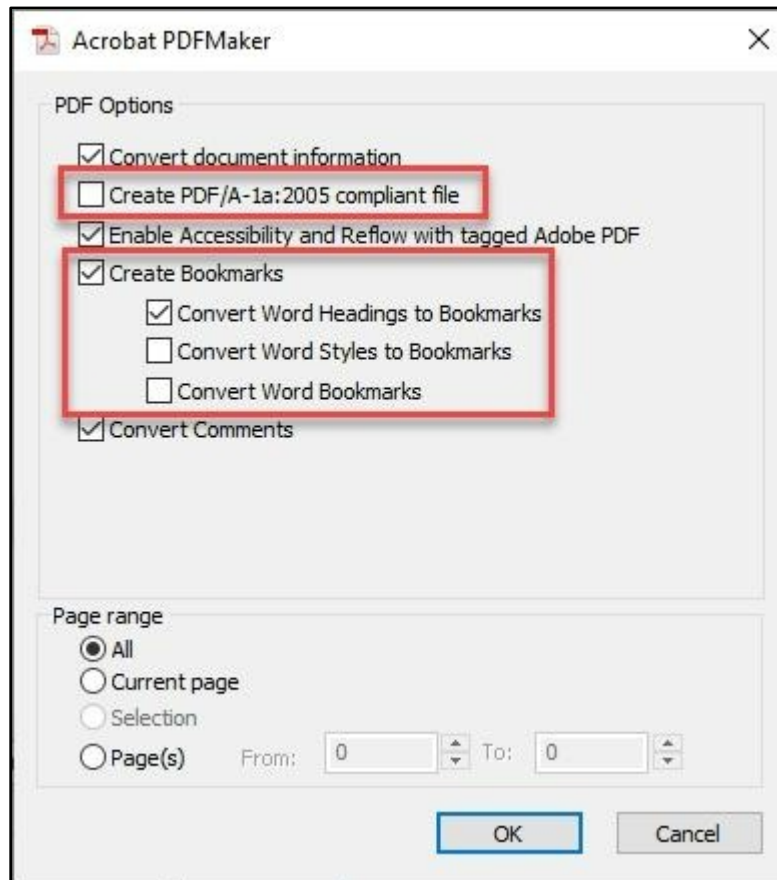


FIGURE 4-2

## Advanced Settings

Advanced PDF creation settings can be found by clicking on **Preferences** on the **Acrobat ribbon**.



FIGURE 4-3

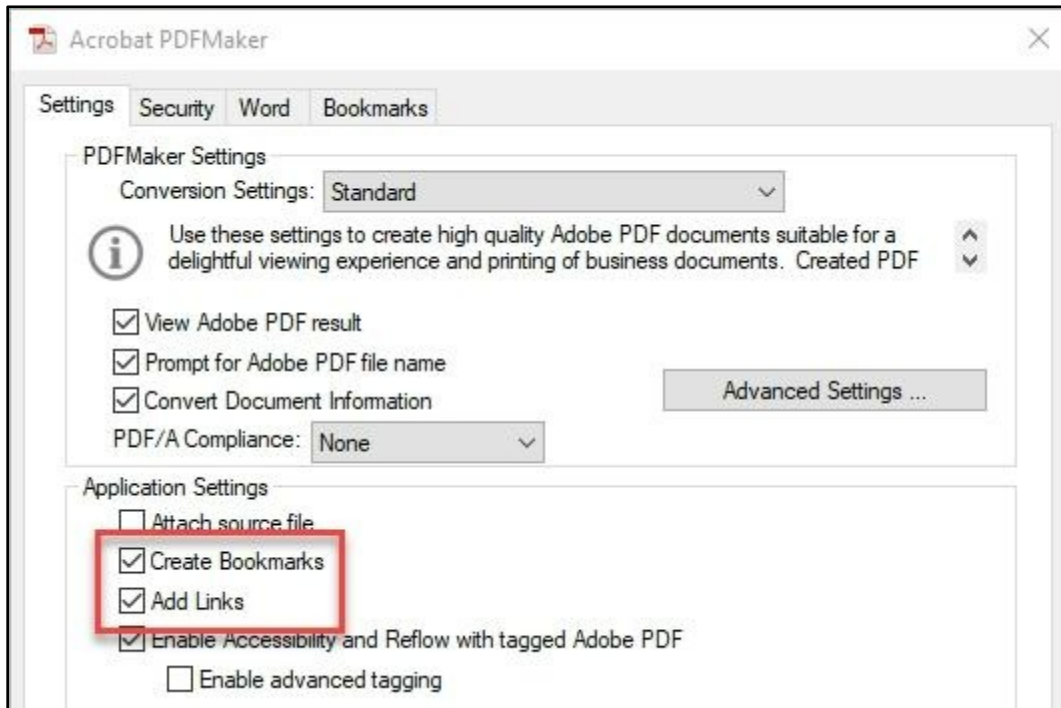To ensure that bookmarks and links are created, check the boxes on the **Settings tab**.



FIGURE 4-4

To require a password to open the PDF or require a password to edit the PDF, check the corresponding box on the **Security tab**.
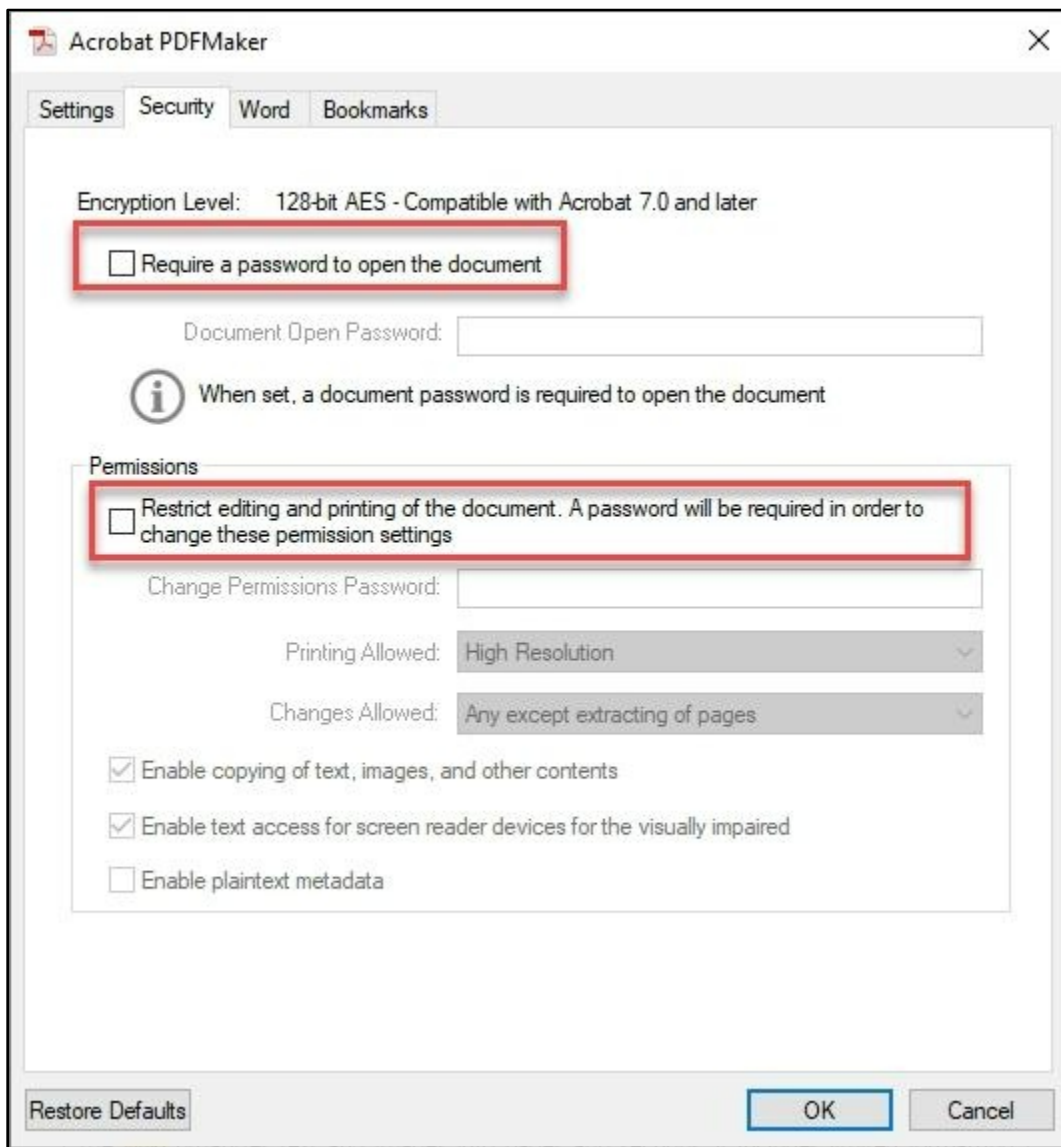
FIGURE 4-5

To identify which styles in your Word document will be bookmarked, click the Bookmarks tab and check off the appropriate styles. If you aren't using Word's styles feature in this manner and

would like to learn so that you can instantly create fully bookmarked PDFs with no manual labor, contact Barron Henley (bhenley@affinityconsulting.com) for information about training options.
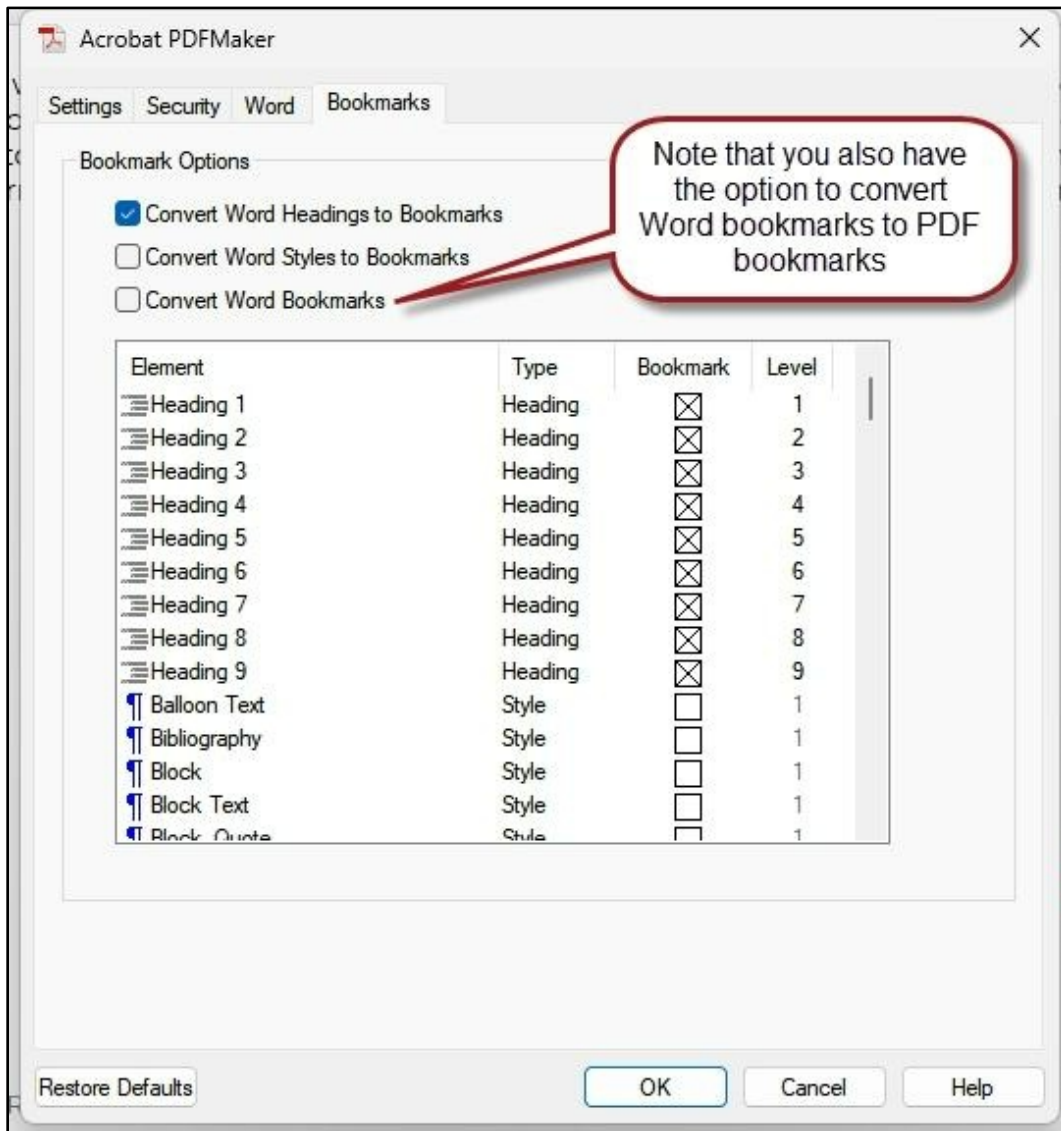


FIGURE 4-6

## Save as Adobe PDF

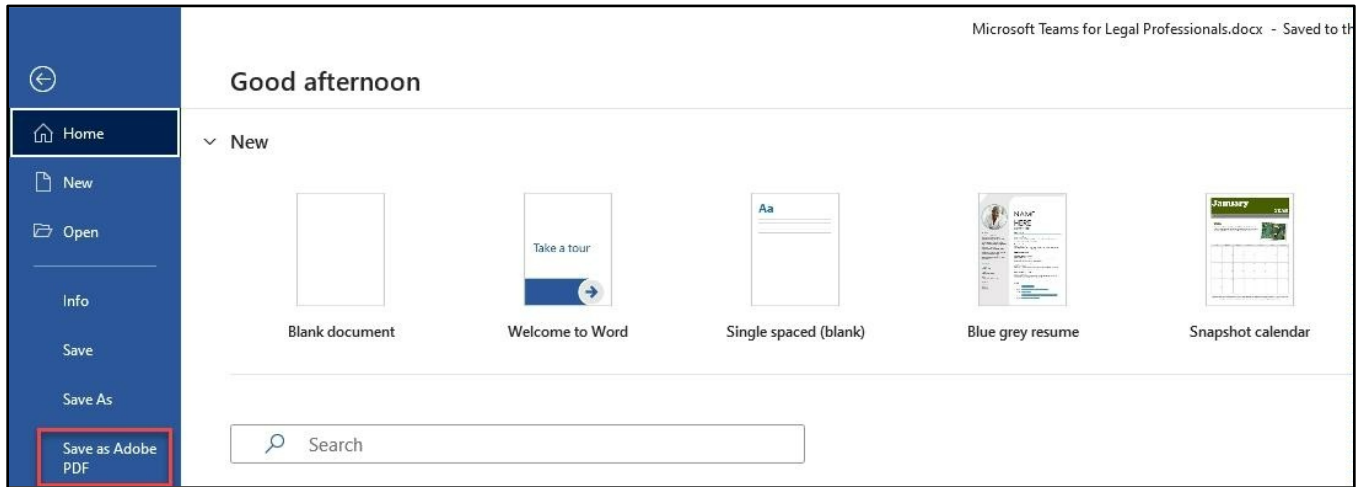Using the **Save as Adobe PDF button** in the **File menu** works exactly the same as the Create button on the Adobe Ribbon.



FIGURE 4-7

## Export - Create Adobe PDF

Using the **Export**, **Create Adobe PDF button** on the **File menu** works exactly the same as the Create button on the Adobe ribbon.
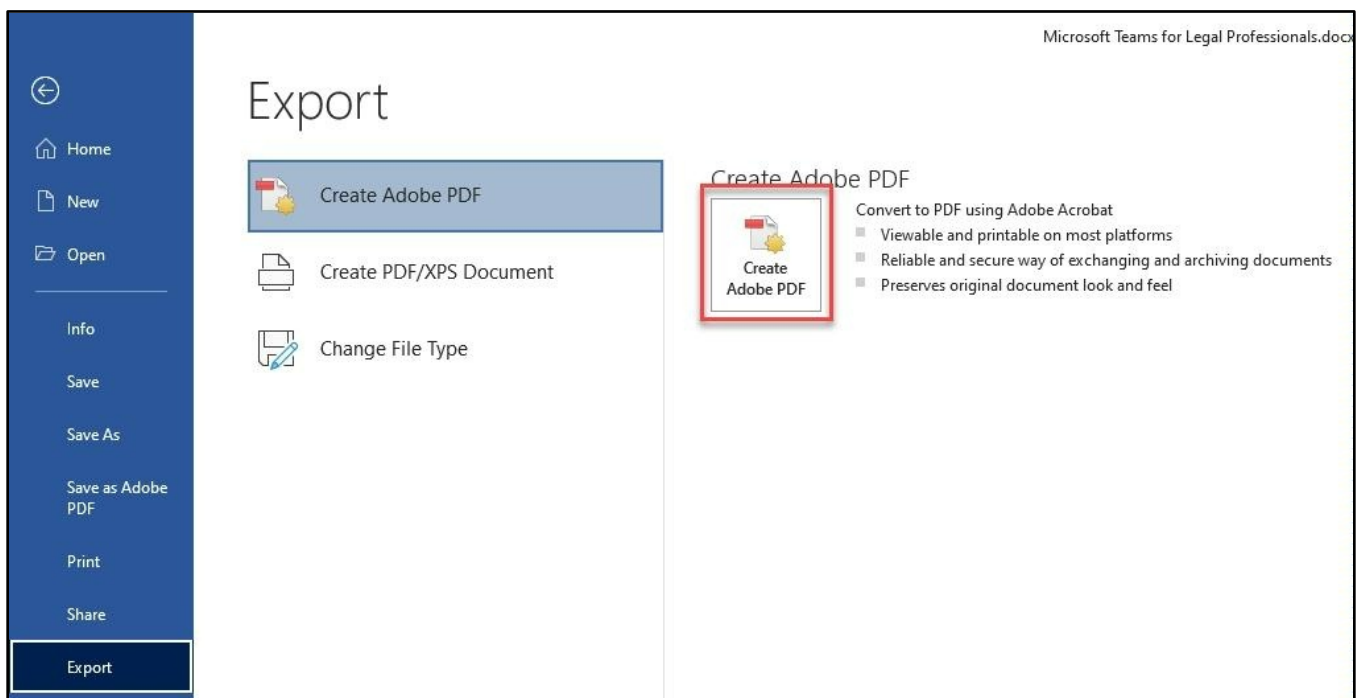


FIGURE 4-8

# Export As PDF/XPS Or Save As PDF

The **Export**, **Create PDF/XPS Document button** on the **File menu** allows you to create a PDF regardless of whether Acrobat is installed and integrated with Word.
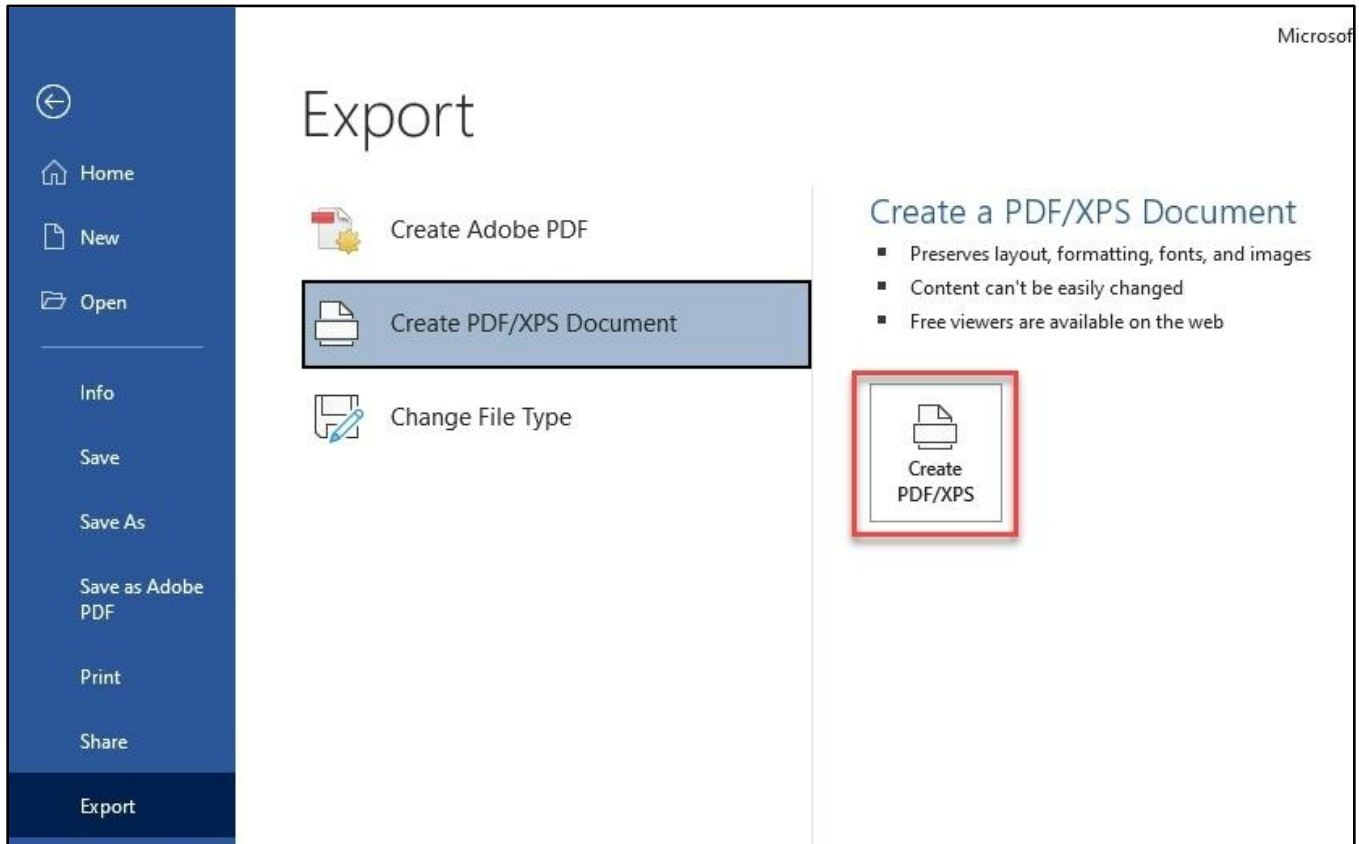


FIGURE 4-9

**Alternatively**, if you find the foregoing to be too many steps, you can perform the exact same operation by simply saving your Word file as a PDF by changing the **Save as type** setting to PDF.
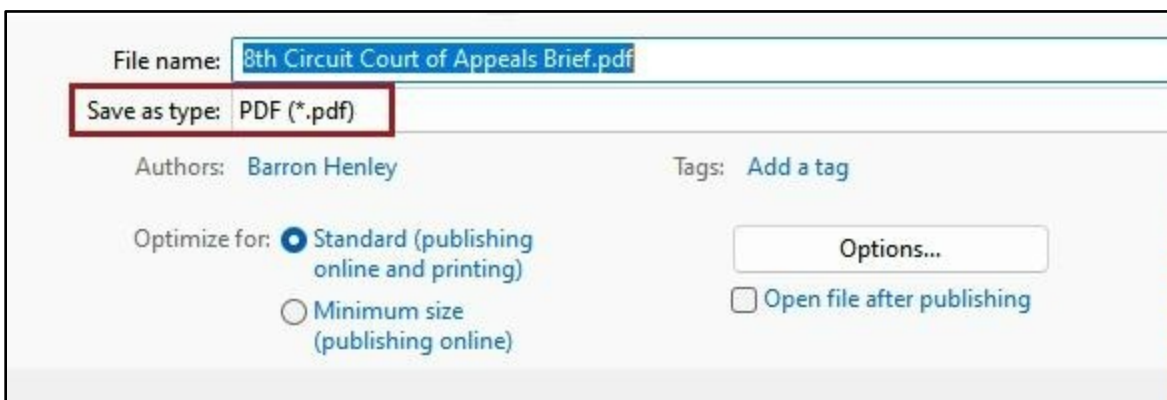


FIGURE 4-10

To create a PDF/A or create bookmarks from heading styles, click on **Options** button in the save dialog.
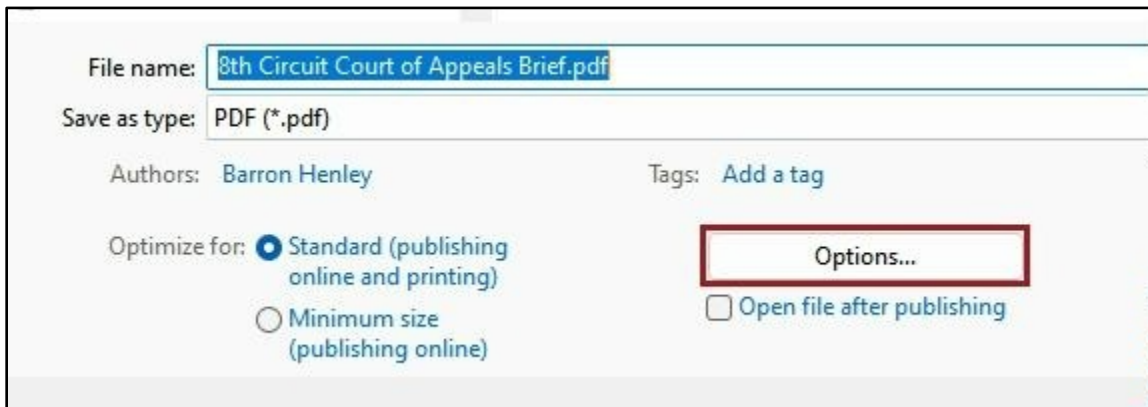


FIGURE 4-11

Now check the appropriate boxes. With this method, you are unable to select styles other than the heading styles. If you need to create bookmarks from styles other than the heading styles, use one of the methods described above.
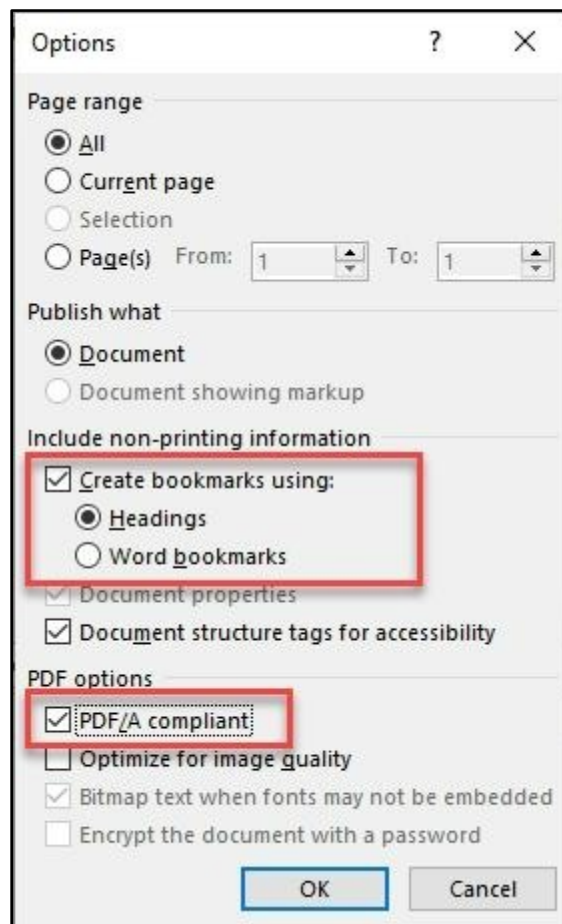


FIGURE 4-12

**TIP**:  Note that Export to PDF/XPS or saving as PDF is often *dramatically* faster than printing to PDF or clicking the Create button on the Adobe Ribbon.  Further, it creates smaller PDF files.  For

example, when I used the Create button on the Adobe Ribbon to make a PDF from a 143 page Word document, it took nearly 3 minutes to complete and the resulting file was 5.58 MB.  When I saved as PDF with the same file, it took 14 seconds and the resulting file was 4.82 MB.  As such, we recommend that you use this method for creating PDFs directly from a Word file because it's faster, the resulting PDF files are smaller, and you can still have Word automatically create bookmarks for you as part of the process.

## Print Driver

You can "print" a Word document as a PDF using **Adobe PDF** or **Microsoft Print to PDF** print drivers. You cannot automatically create bookmarks or links in the resulting PDF when using a print driver.

From the **File menu**, click on **Print**, and select either **Adobe PDF** or **Microsoft Print to PDF** as your printer.  However, **we do NOT recommend suing the Microsoft Print to PDF** method because it is slow, there's no way to have it automatically create bookmarks, and the resulting files are much larger than they should be.  For example, if I take the same 143 page Word document mentioned 2 paragraphs above and Microsoft Print to PDF, the resulting file is 10 MB compared to the same PDF produced by Saving As PDF which was 4.82 MB.
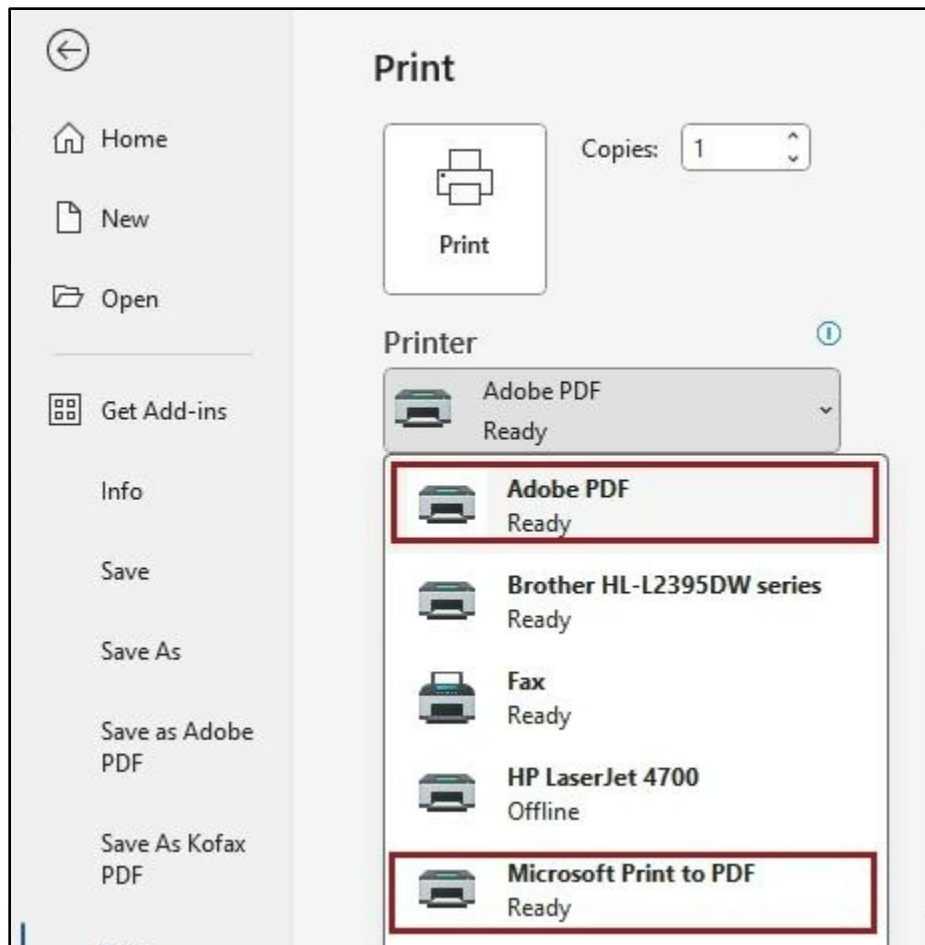


FIGURE 4-13

# Microsoft Outlook Integration

## Acrobat Ribbon

Acrobat also installs a ribbon in Microsoft Outlook. For interested in creating PDF archives of emails and attachments, this integration can be a lifesaver.

### Convert Open Email to PDF

To convert an open email to a PDF, click on the **Convert to Adobe PDF button** the A**crobat ribbon**.
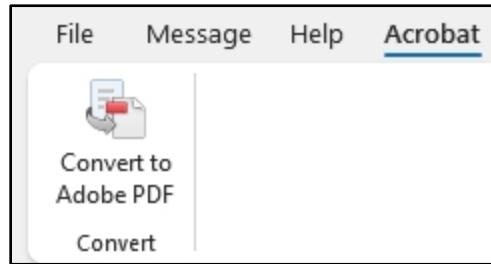


FIGURE 4-14

### Create PDF Portfolios from Multiple Emails or Folders

To create a PDF portfolio (see Chapter 11 for more information about PDF portfolios) from multiple emails or an entire folder:

1. Select the emails or entire folders
2. On the Acrobat ribbon, click the **Selected Messages button** or **Selected Folders button**
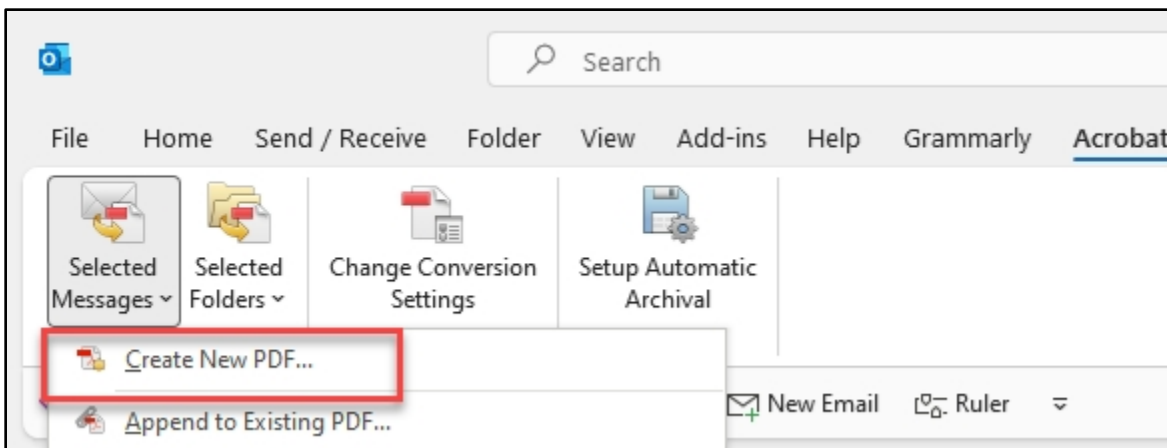3. Select **Create New PDF...**



FIGURE 4-15

## Add Subsequent Emails to Existing PDF

Once you've created a PDF, you can add additional emails to it by selecting the new emails and:

1. On the Acrobat ribbon, click the **Selected Messages button** or **Selected Folders button**

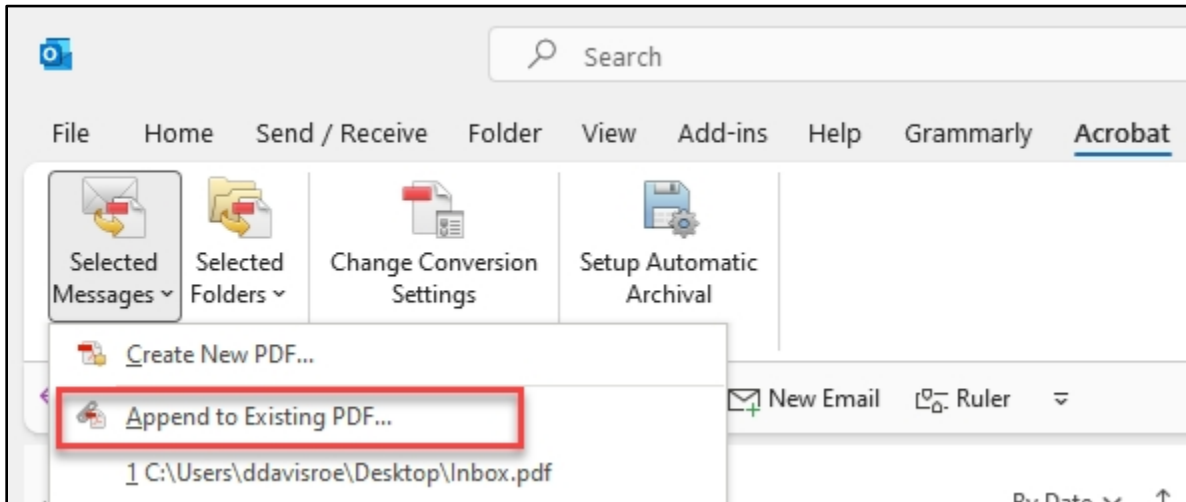2. Either click on the desired PDF files or click on **Append to Existing PDF...** to locate the file.



FIGURE 4-16

## Automatic Archival

You can also set up folders to automatically create PDF archives. To set up automatic archival:

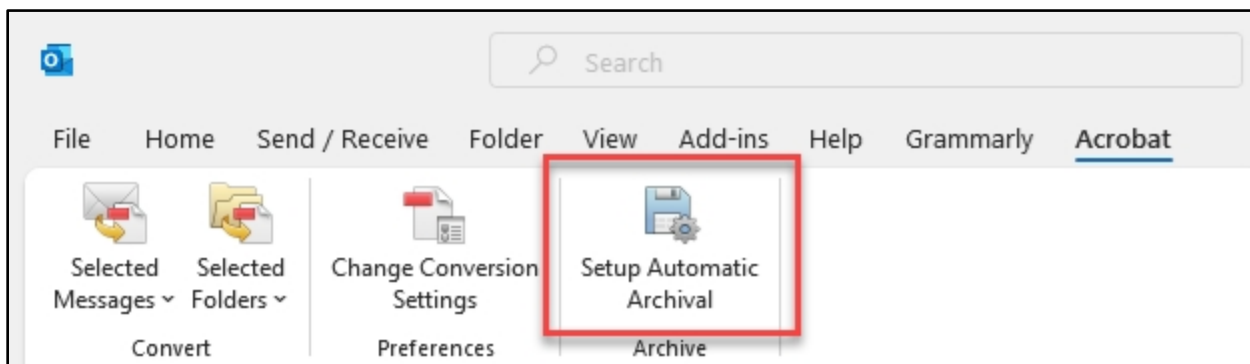1. Click on the S**etup Automatic Archival button** on the **Acrobat ribbon**.



FIGURE 4-17

2. Check the box to **Enable Automatic Archival**.

3. Select the desired frequency.

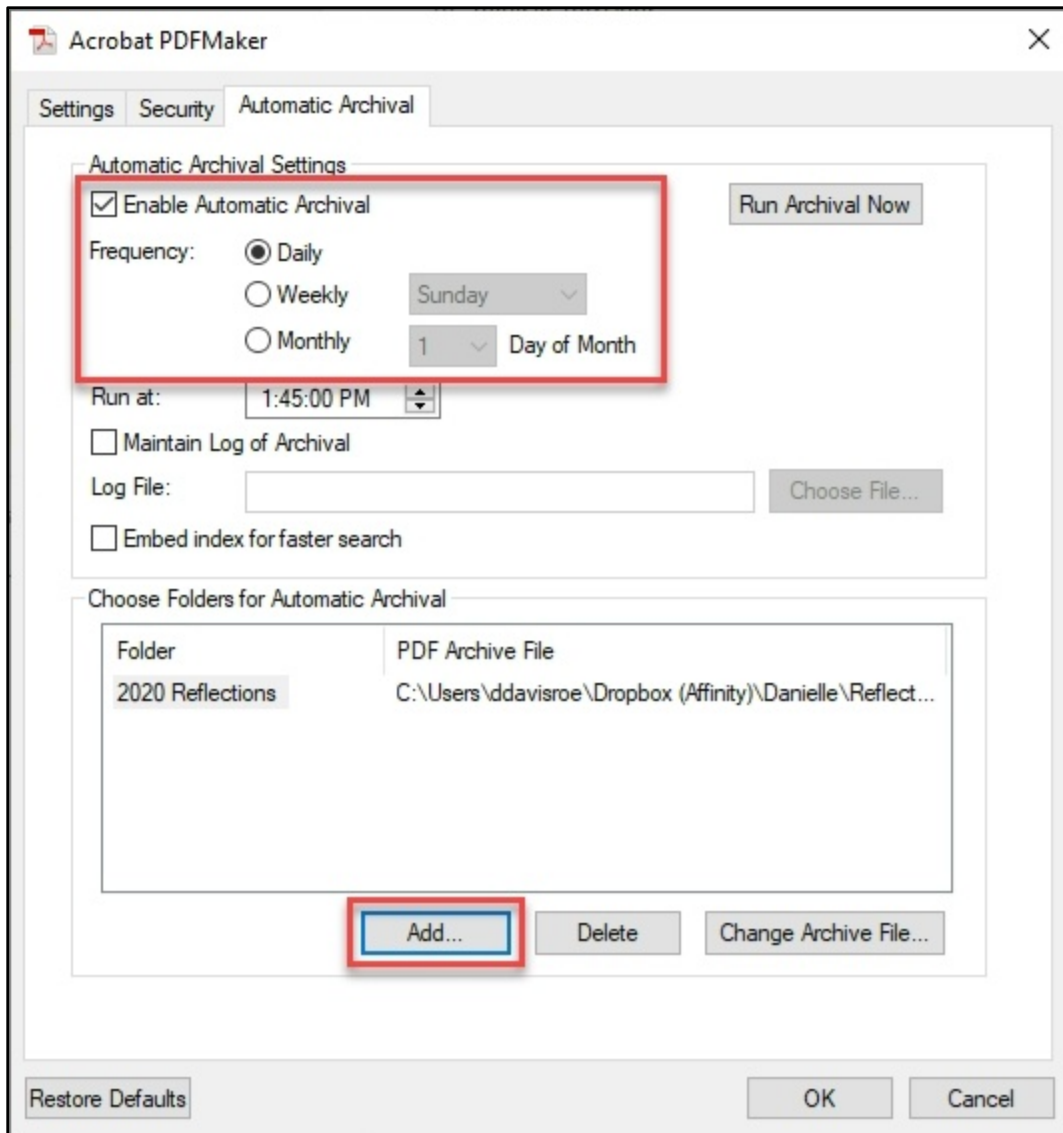4. Click on the Add button to select the desired folders.

FIGURE 4-18

# Create PDFs from Acrobat

Acrobat can create PDFs from single files, scanners, web pages, your computer's clipboard, and multiple files. To get started, click on **Create** in the ☰ Menu dropdown and select the desired method.
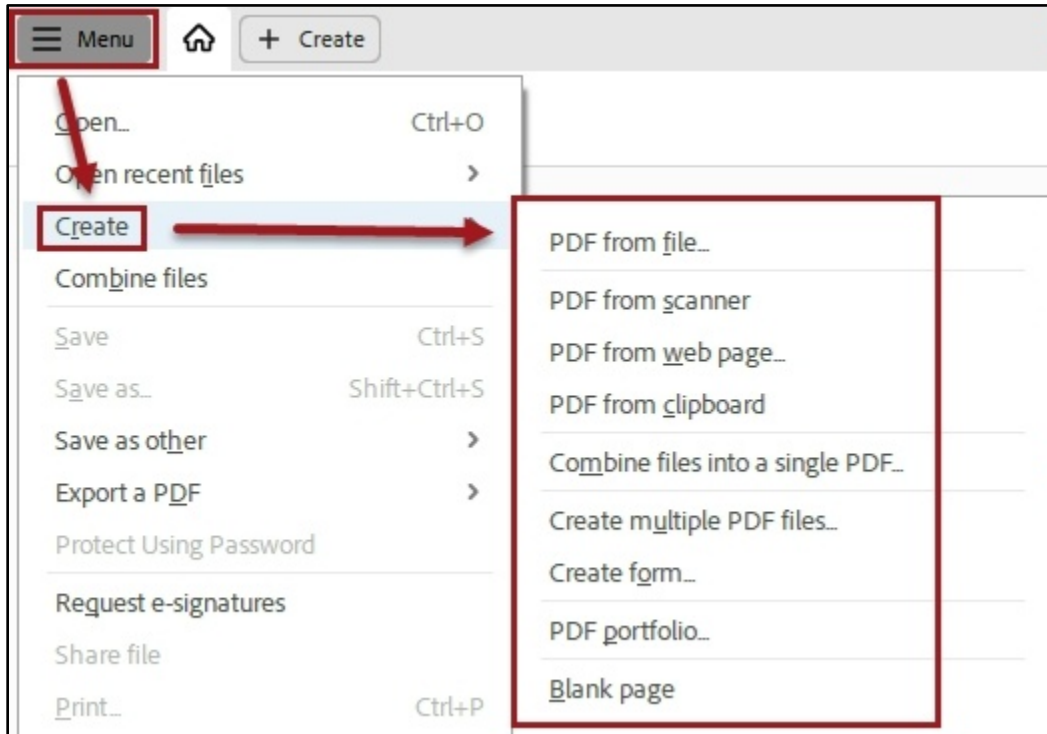


FIGURE 4-19

Alternatively, you can click the new **+ Create** button at the top of the Acrobat interface. This button provides the same options as the 🅐 Create a PDF tool.

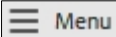## From Single Files

To create a PDF from a single file, from the ☰ Menu button, select **Create**, and click on **PDF from file...**Then select the file to be converted.



FIGURE 4-20

# From Scanner

If you have a TWAIN or WIA compliant scanner connected to your computer, then you can create PDFs from paper documents from the ☰ Menu button, by selecting **Create**, and clicking on **PDF from Scanner…**
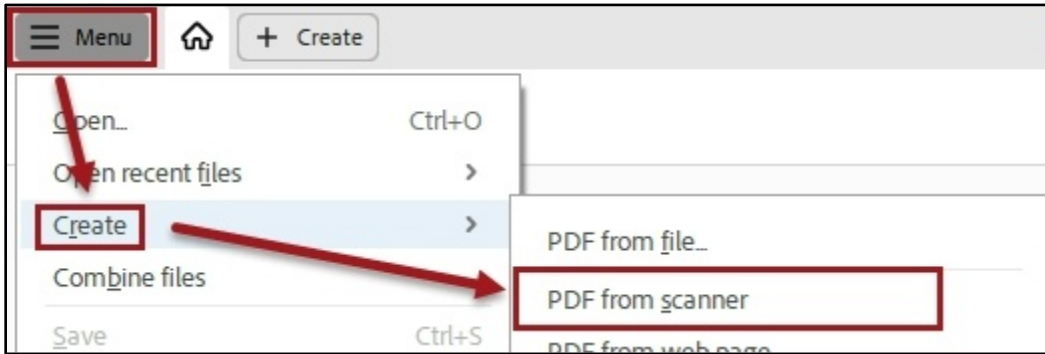


FIGURE 4-21

Under **Scanner**, select the scanner to be used.



FIGURE 4-22

You can either create a new PDF from the scan or append the scan to an existing file. To append it to an existing file, check the box and select the file.
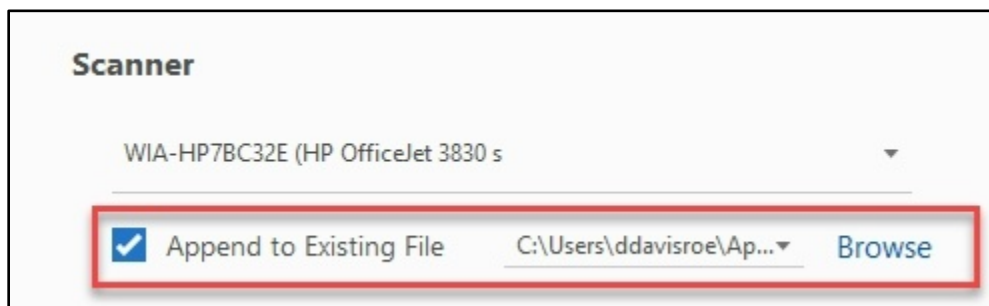


FIGURE 4-23

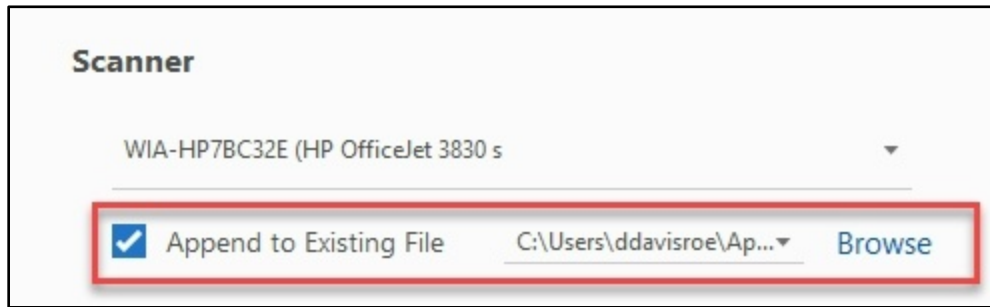To change the scanner's settings, click on the gear icon.



FIGURE 4-24

# From Web Page

To create a PDF from a web page, from the ☰ Menu button, select **Create**, and click on **PDF from Web Page...**Then select the file to be converted.
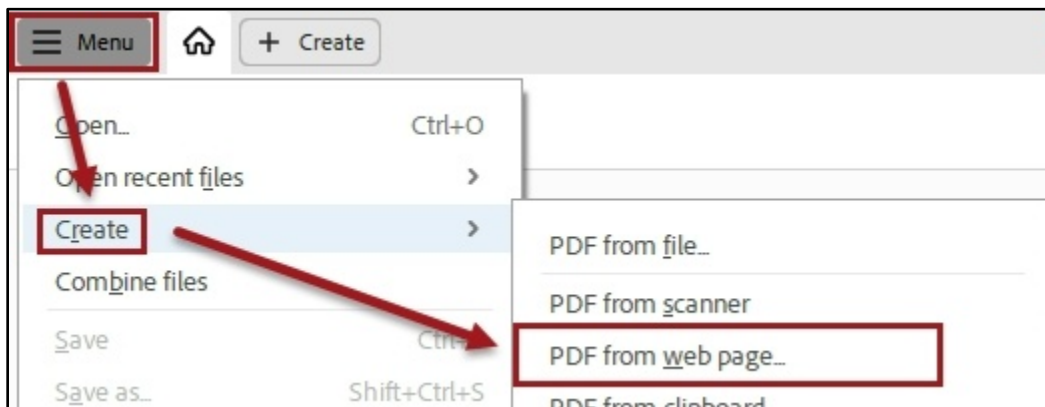


FIGURE 4-25

Enter the **URL**.

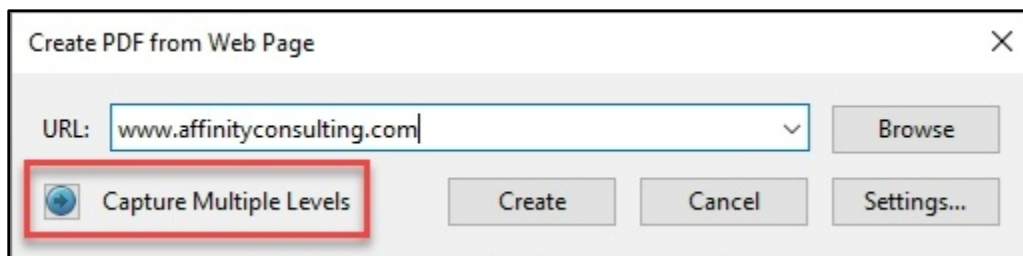To capture more of a web site than a single page, click on **Capture Multiple Levels**.



FIGURE 4-26

Click on the **Settings... button** to create bookmarks automatically.

# From Clipboard

When you copy content, it is added to your Windows clipboard. The Windows clipboard allows you to paste that content into other programs.

To create a PDF from your clipboard, from the ☰ Menu button, select **Create**, and click on **PDF from Clipboard**.
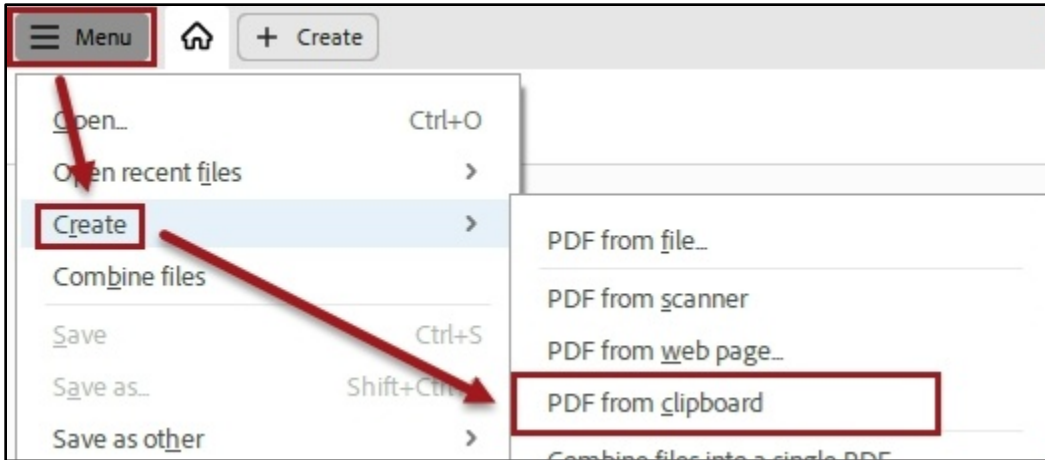
FIGURE 4-27

## From Multiple Files

Adobe Acrobat can combine multiple files into a single PDF. See Chapter 10 for instructions on how to combine files into a single PDF.

# CHAPTER 10
# COMBINING FILES

Acrobat can combine multiple files of multiple file types into a single PDF. There are a wide variety of ways that you can combine files, including dragging and dropping into the Page Thumbnails or Organize Pages view as discussed in Chapter 9.

While dragging and dropping files works, the methods discussed below are superior because you can create a bookmark for the first page of each file. Bookmarks, discussed further in Chapter 18, make navigating the PDF easier.

## Menu Button

To combine multiple files into a single PDF from the ☰ Menu button, select **Create**, then **Combine Files into a Single PDF...**
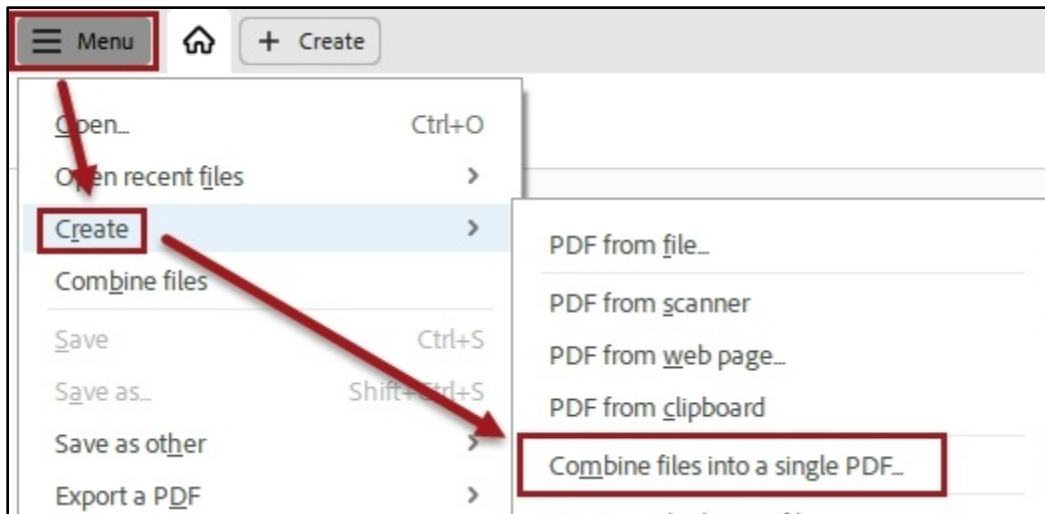


FIGURE 10-1

# Home Screen

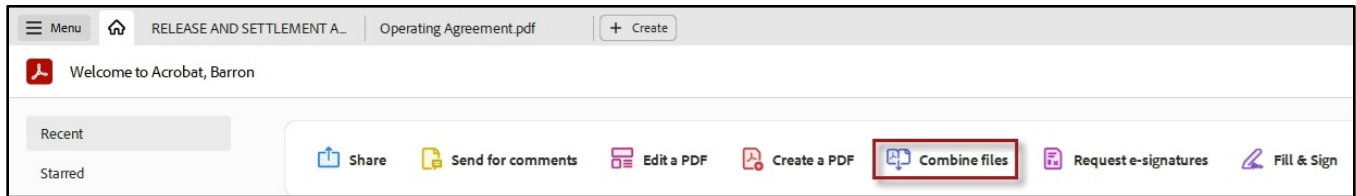From the **Home screen** (see page 3), click on **Combine Files**

# Tools Screen

From the **All Tools pane** (see page 5), open the ⬚ **Combine files** tool.

# File Explorer

From **File Explorer**, select the files to be combined. (Hold down Ctrl or Shift while clicking to select multiple files). **Right-click**, and select **Combine files in Acrobat…**  Note that if you have Windows 11, when you right-click, you'll need to select **Show more options** from the menu that appears in order to see the option shown below.
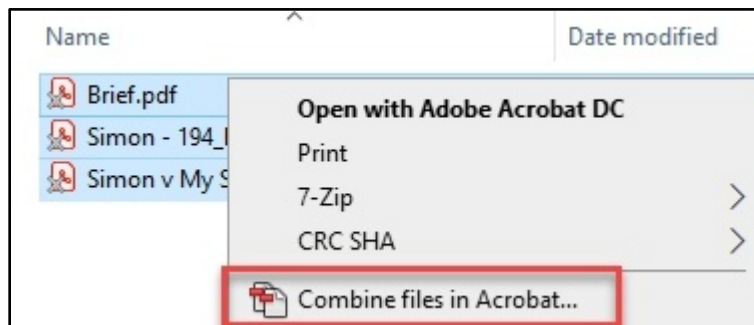


FIGURE 10-3

See below for next steps.

# Combing PDFs from Combine Files

Regardless of how you get to the Combine Files tools:

1.  Click on the **Add Files button**.
2.  Select the files to be combined (use **Ctrl** or **Shift** + click to select multiple files).

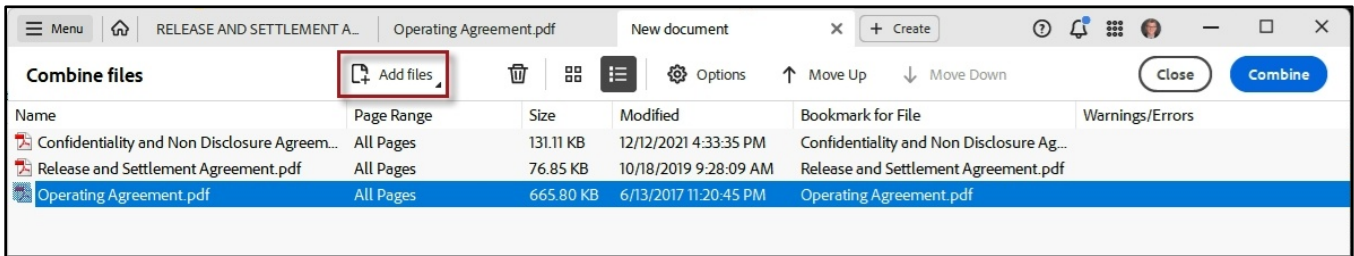3. To add additional files, click on the **Add Files... button**.



FIGURE 10-4

4. To reorder the files, select the file(s) to be moved and click on the **Move Up** or **Move Down buttons**.
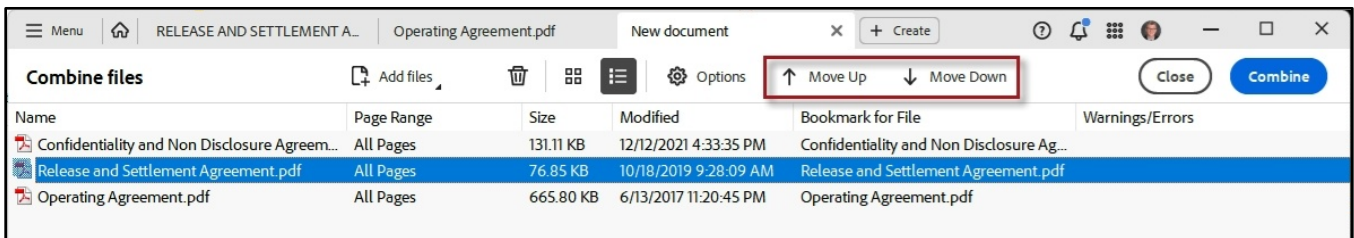


FIGURE 10-5

5. To add a bookmark for the first page of each file, click on **Options**.



FIGURE 10-6

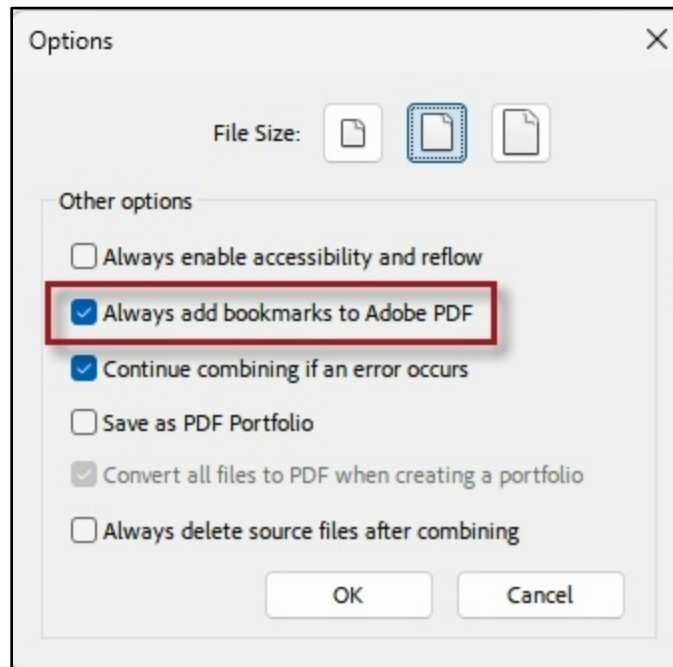6. Check the box to **Always add bookmarks to Adobe PDF** and click **OK**.



FIGURE 10-7

7. Click on the **Combine button**.

# CHAPTER 12
# REDUCING PDF FILE SIZE

Creating PDFs that are small enough to e-file or email starts with the creation of the PDF. Using the right method will create higher quality PDFs that are also smaller. Even after creating PDFs with the best method, they are sometimes too large to e-file or email. In that case, Acrobat can compress the file for you.

## Determining PDF File Size

Open the PDF in Acrobat, from the ☰ Menu button, click **Document Properties**. On the **Description tab**, under **Advanced**, check the **File Size**.

Advanced

PDF Producer:   Acrobat Distiller 8.1.0 (Windows)

PDF Version:   1.6 (Acrobat 7.x)

Location:   C:\Documents\HMU Consulting\Bar  Other Associations...\Final Versions of Chapters\

File Size:   2.83 MB (2,965,680 Bytes)

Page Size:   8.50 x 11.00 in                    Number of Pages:   311

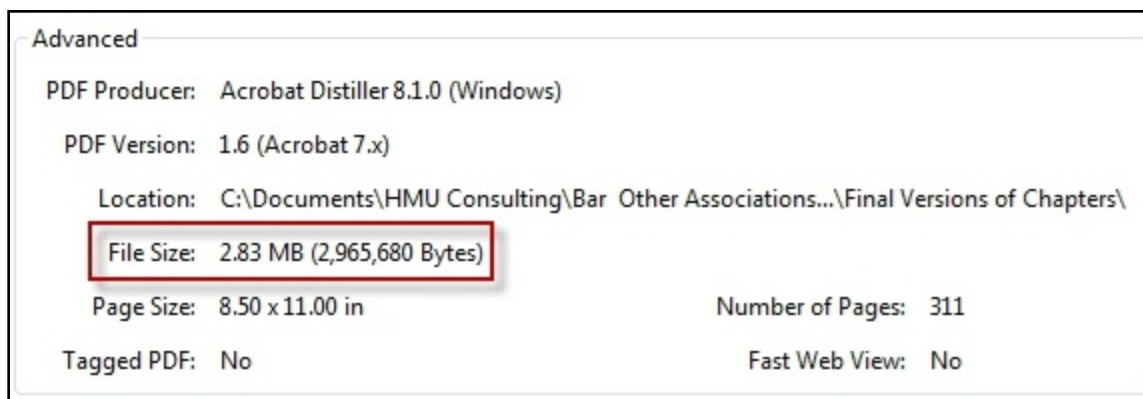Tagged PDF:   No                                Fast Web View:   No

FIGURE 12-1

## PDF Creation

Whenever possible, create a PDF directly from the original file's editing software (such as Microsoft Word) rather than by scanning in a paper version of it. If, however, the resulting PDF is still too large, you may need to change some settings before converting. See Chapter 4 for more information on creating PDFs.

## Acrobat Ribbon

When creating PDFs from the Acrobat add-in for Microsoft Word, click on **Preferences** on the **Acrobat ribbon**. On the **Settings tab**, change Conversion Settings to Smaller File Size to create a smaller PDF.
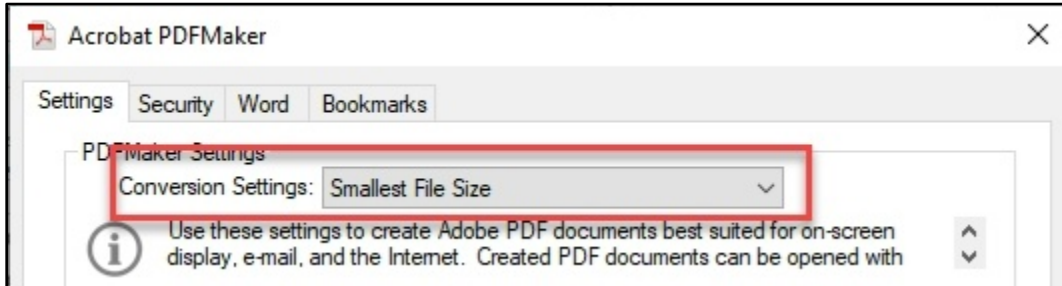


FIGURE 12-2

## MS Office Export

When creating PDFs from the Microsoft Office Export button, choose **Optimize for: Minimum size (publishing online)**.
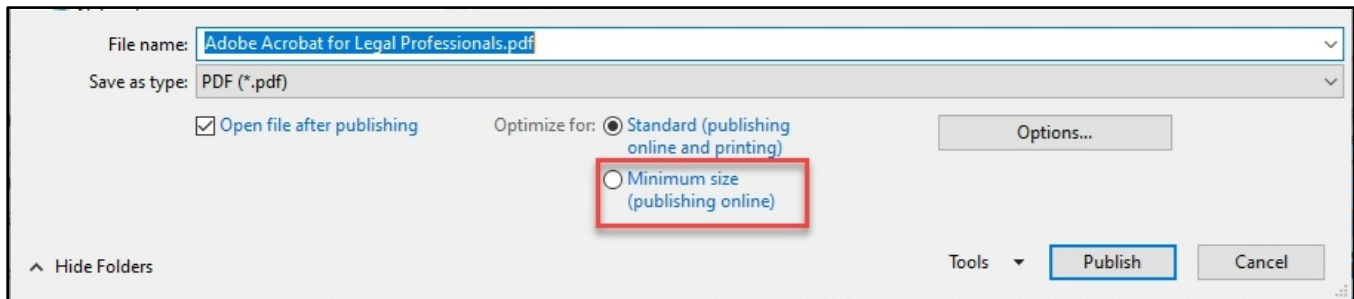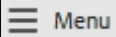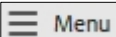


FIGURE 12-3

## Scanning

File size when scanning a document to a PDF is impacted by three things: 1) color mode, 2) dpi and 3) number of pages.

- **Color Mode**: Most scanners will allow you to scan in color, black and white or grayscale. Even if the document you're scanning has no color in it, the resulting scanned document will be larger if you scan with color mode set to color. The same thing is true with grayscale. To keep file size small, you want your scanner's color mode set to black and white.

- **DPI**: DPI stands for dots per inch, and this is the resolution your scanner is set to. The higher the dpi, the better the quality. However, as you increase dpi, you also increase file size. Most scanners can scan between 100 to 1,200 dpi. A good balance between quality and file size is 300 dpi.

- **Number of Pages**: The more pages you scan, the larger the resulting file size. If you scan at 300 dpi black and white and the file is still too large, then there are still ways to reduce the file size as described below.

# Compressing PDFs

You can compress a PDF to reduce its file size by reducing its file size from the ☰ Menu button or by using the Optimize PDF tools. The Optimize PDF tools include more advanced options.

## Menu Button

From the ☰ Menu button, **Save as other**, then click on **Reduced size PDF**. Then, choose where to save the file.
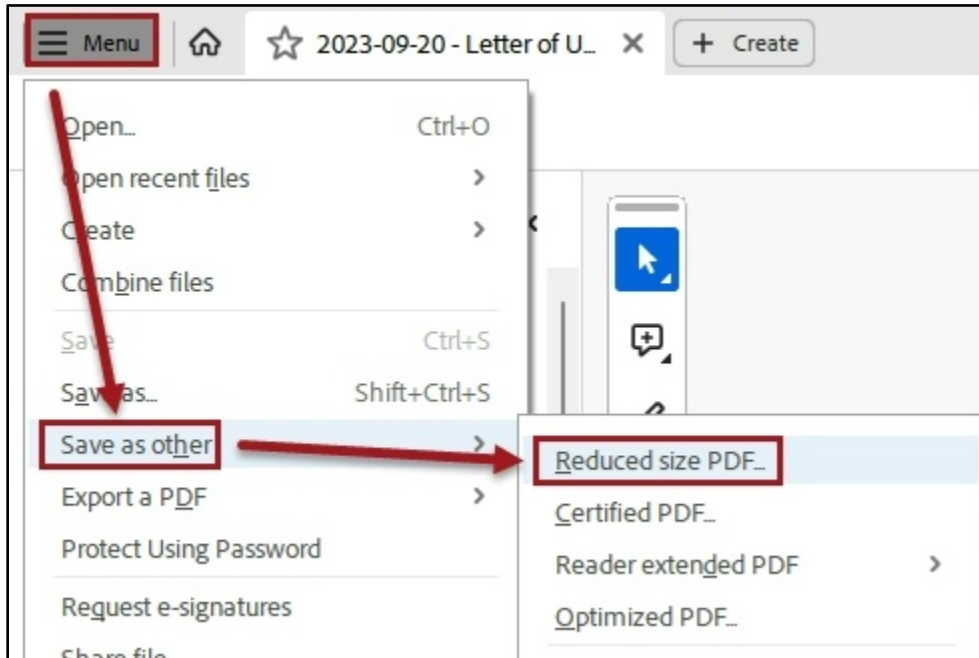
FIGURE 12-4

## Optimize PDF Tools

Open the **Compress a PDF tool** (see page 5) to get started.

### Simple Optimization

Click on **Single File** or **Multiple Files** to run the same file size reduction as the ☰ Menu button.
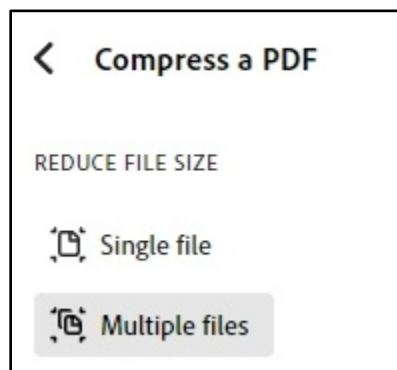
FIGURE 12-5

# Optimization Settings

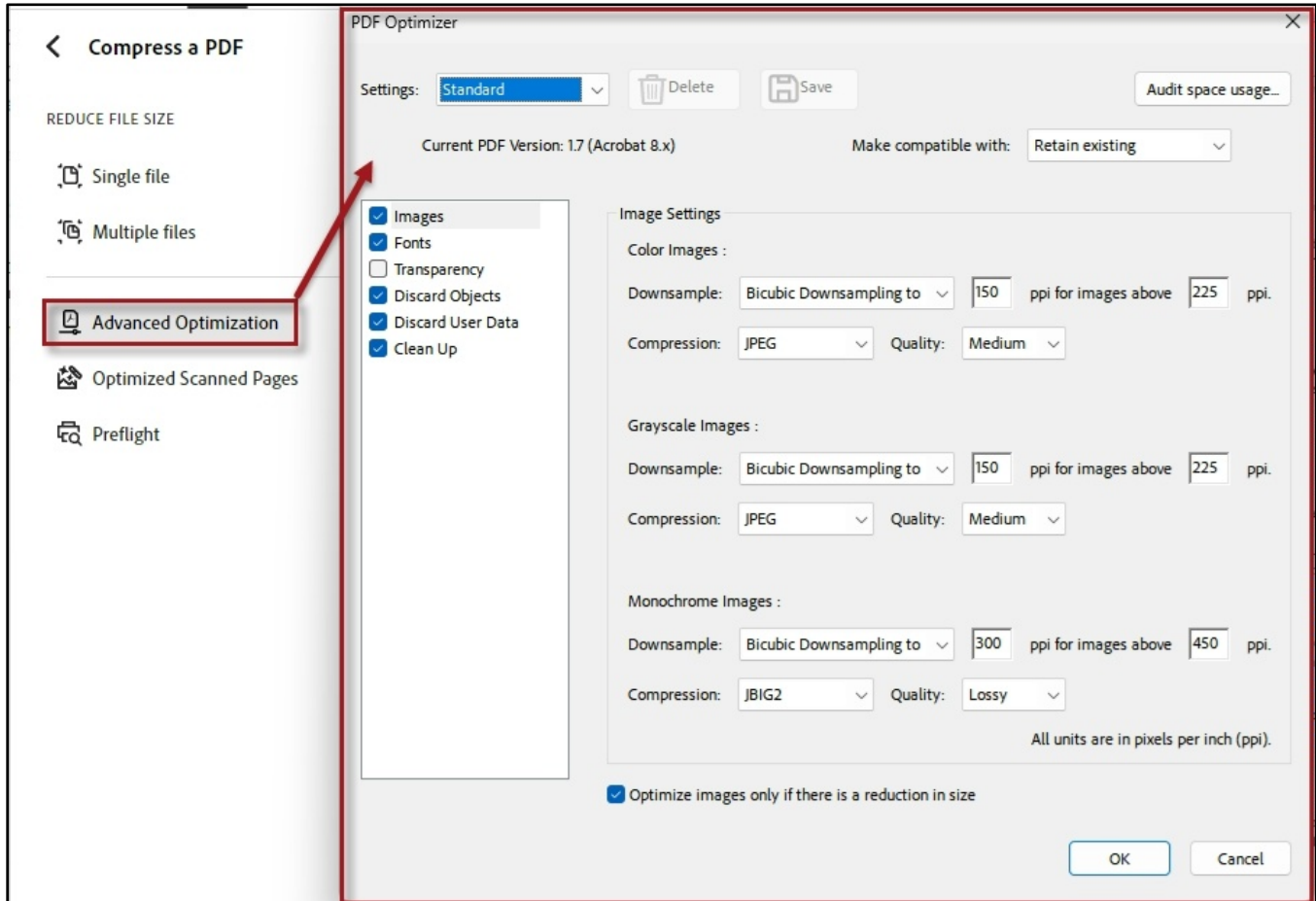To change the optimization settings, click **Advanced Optimizations**.



FIGURE 12-6

# CHAPTER 13
# SPLITTING PDFS

## Splitting the PDF into Multiple PDFs

If a PDF cannot be reduced to the necessary size (see Chapter 12), the PDF will need to be split into multiple smaller PDF files. PDFs may be split for other reasons, but file size is the most common reason.

Open the **Organize Pages tool** (see page 5). Click on the **Split button**.
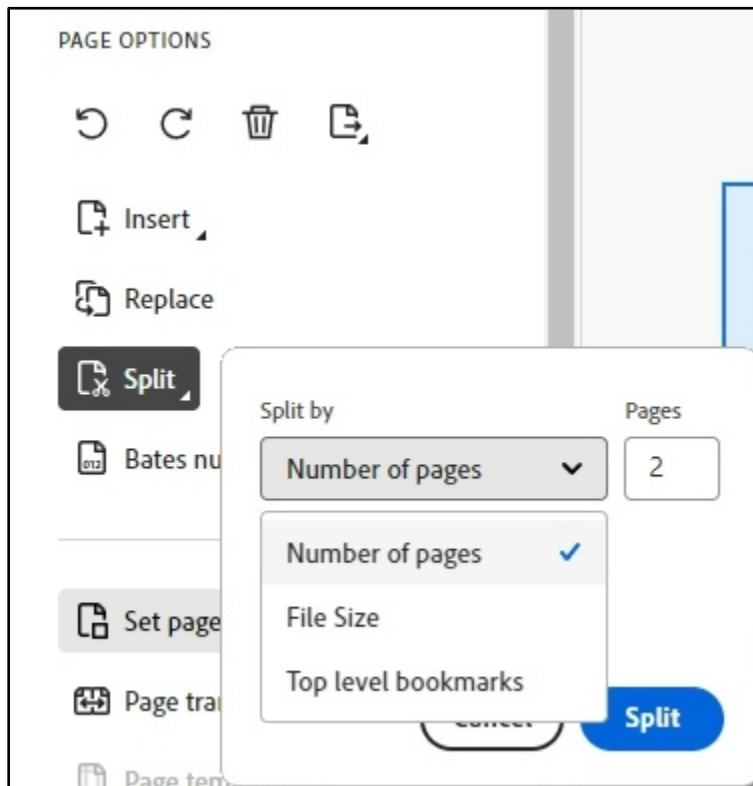


FIGURE 13-1

You can spit by number of pages, file size, or top-level bookmarks (see Chapter 18). Splitting by file size will ensure that the resulting PDFs are small enough to fall under the maximum size.
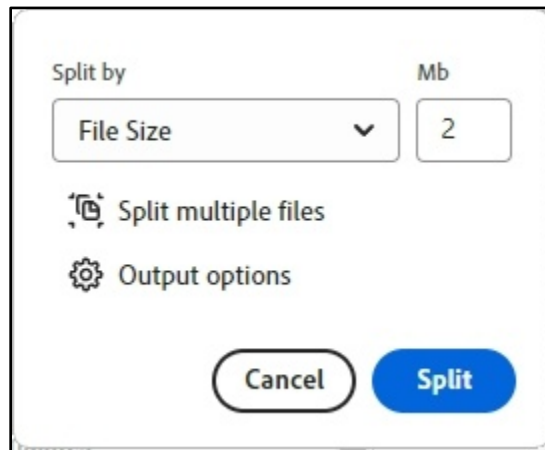


FIGURE 13-2

Click on the **Output Options button** to set where the files are saved and how they are named.
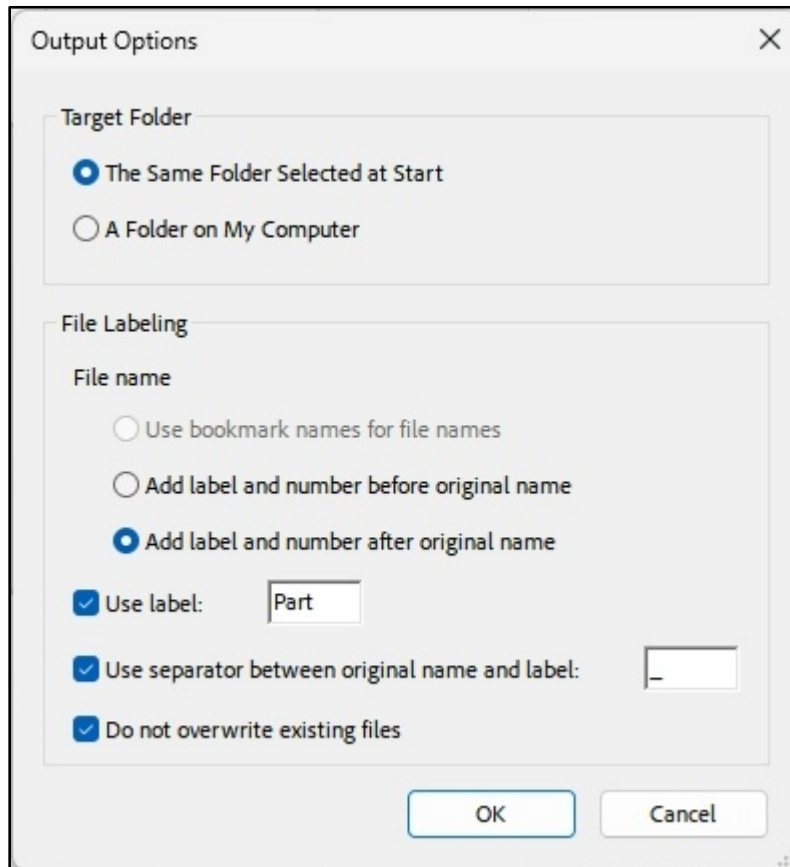


FIGURE 13-3

# BOOKMARKS AND LINKS

Bookmarks allow you to easily navigate through a PDF using the Bookmarks panel. From the Bookmarks panel, you can click on a bookmark to be taken to that place in the PDF.

## Showing the Bookmarks Panel

To show the Bookmarks panel:

1. Open the **Navigation Pane** (see page 9).

2. In the Navigation Pane, click on the **Bookmark Icon** to open the Bookmarks panel and any existing bookmarks.
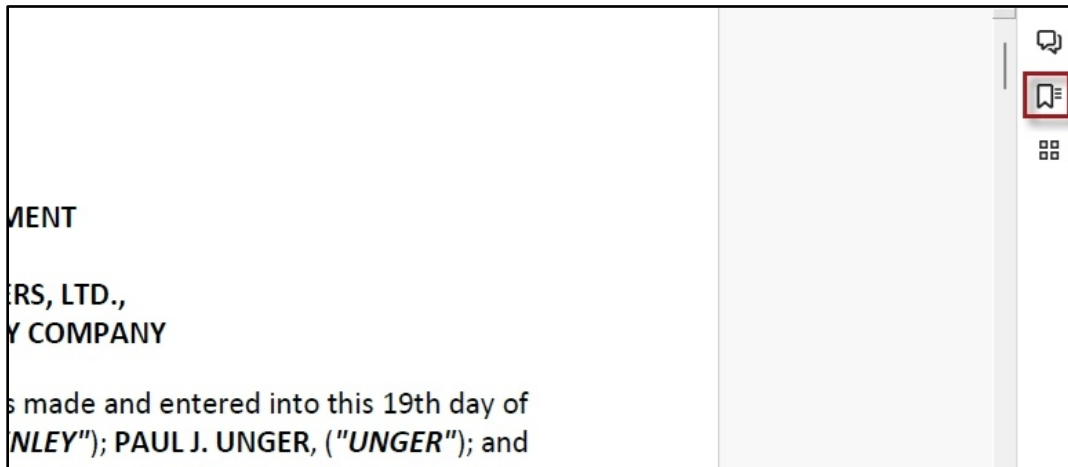


FIGURE 18-1

## Creating Bookmarks

The easiest way to create bookmarks is at the time you convert a Word formatted using heading styles into a PDF (see page 12). If, however, you need to add bookmarks to an existing PDF:

1. Scroll until the text you want to bookmark is at the top of the Document screen.

2. Right-click on the text, and select **Add Bookmark**.  You can also add a bookmark by clicking in the document where you want to add one and clicking the Add Bookmark button in the Bookmarks pane.
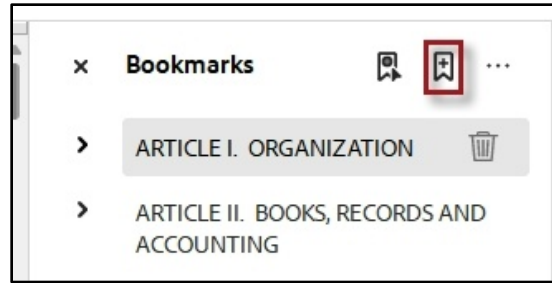
FIGURE 18-2

3.   In the **Navigation pane**, right-click on the bookmark to rename it.

# Navigating With Bookmarks

To use bookmarks for navigation, open the Bookmark panel and click on the name of a bookmark to be taken to that location in the PDF.

# Customizing Bookmarks

## Changing the Order of Bookmarks

To reorder bookmarks in the Bookmarks panel, drag-and-drop them into the desired order.

## Nesting Bookmarks

Bookmarks can be nested underneath each other. To nest them, drag-and-drop the child bookmark under and slightly to the right of the parent bookmark.



FIGURE 18-3

## Changing the Format of the Bookmark Link

To change how the bookmark name appears in the Bookmark pane, right click on the bookmark and select **Properties**. You can make the bookmark appear, bolded, italicized, or in a different color.
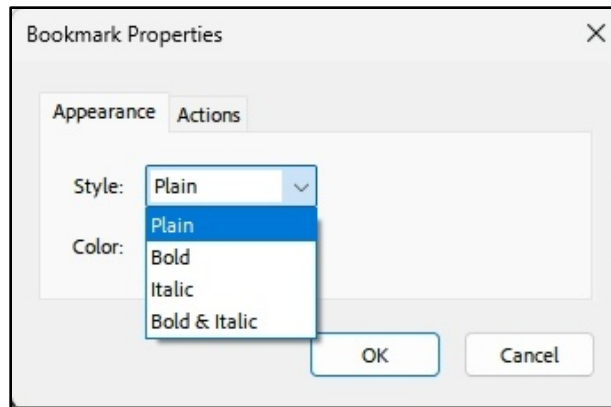
FIGURE 18-4

## Changing Zoom Level

You can control the Zoom level for a bookmarked location.

1.  From the **Bookmark panel**, right click on the bookmark and click on **Properties**.

2.  On the **Actions tab**, click on **Edit**.
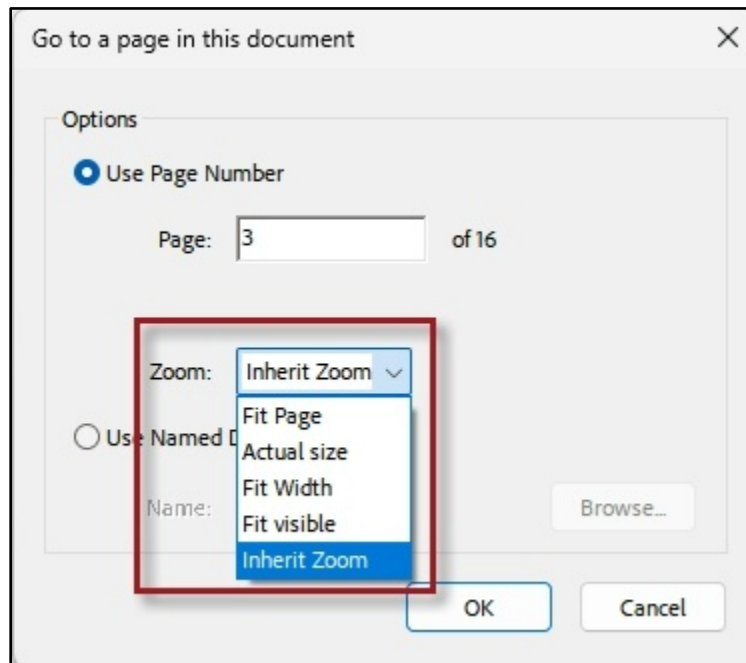
3.  Then select the desired Zoom level.



FIGURE 18-5

## Changing Default Zoom Level

You can set the default zoom level for bookmarks by clicking on the **Bookmark options button** and selecting the desired level under **Set Default Bookmark Zoom level**.
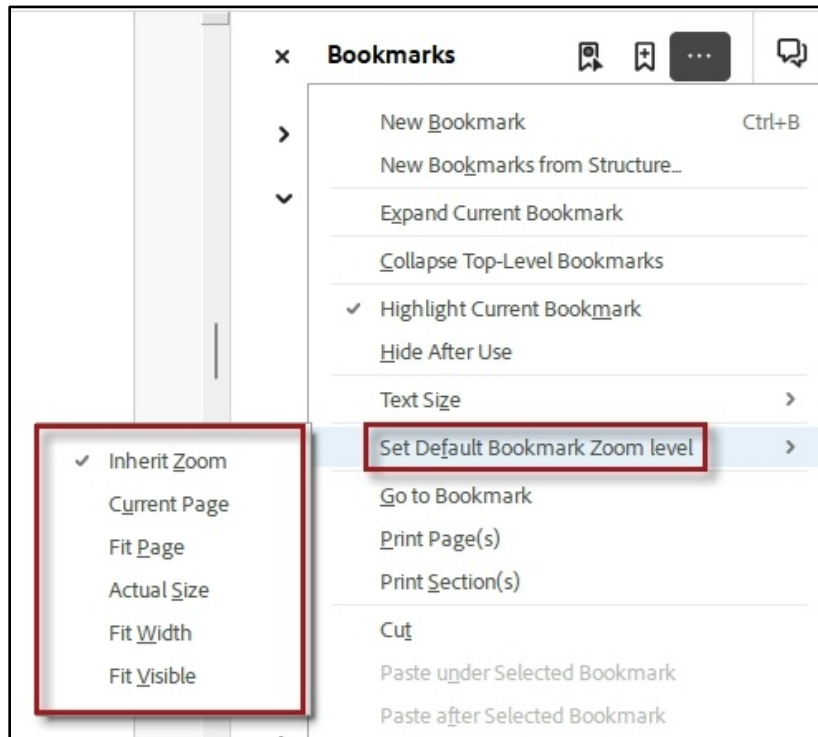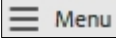


FIGURE 18-6

## Showing the Bookmark Panel When Opening PDF

Many people are unaware of the Bookmarks panel and the benefits of using it. If you add bookmarks to your PDF and share it with others, they may be completely oblivious to the bookmarks. By setting the PDF to automatically open the Bookmarks panel, you'll bring the bookmarks to the attention of others using the PDF and save them the step of opening the Bookmarks panel themselves.

To show the Bookmark panel upon opening:

1. Click on ☰ Menu **button ➜ Document Properties...**
2. Click on the **Initial View tab**.
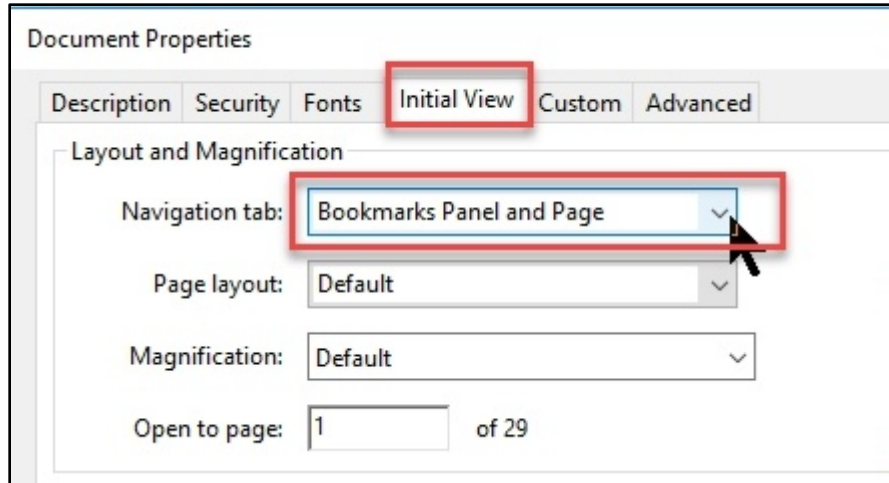3. Choose **Bookmarks Panel and Page**.

FIGURE 18-7

4.  Click **OK**.

# Creating Links to Bookmarks

You can add hyperlinks to bookmarks in your PDF so that when someone clicks on a word or phrase (such as a cross reference), it takes them to another part of the PDF.

To create hyperlinks to bookmarks from other text in your PDF:

1.  Select the text to hyperlink, right-click, and select **Create Link.**

2.  Change **Link Type** to **Invisible Rectangle** to avoid creating a visible box around the hyperlinked text. Leave the Link Action on "
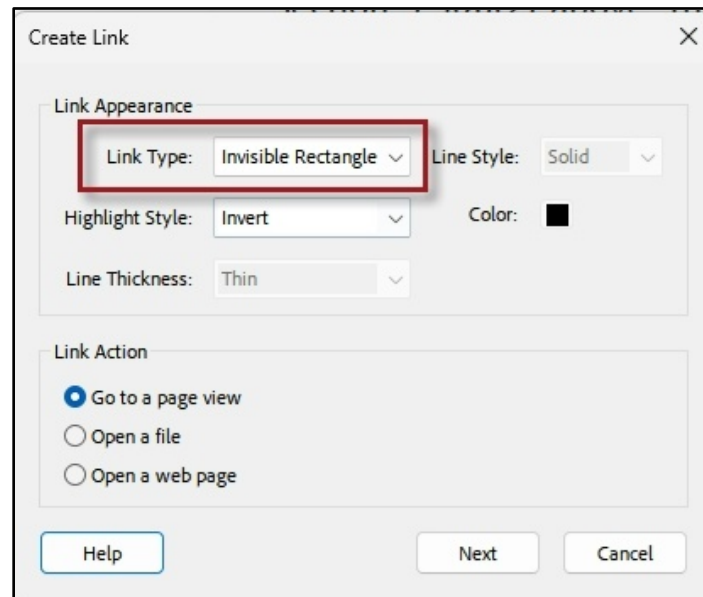
3.  Do not make any other changes.



FIGURE 18-8

1.  Click on the **Next button**.

2.  The Create Go to View dialog will appear.

3. While this dialog is open, click on the appropriate Bookmark in the Bookmark panel.

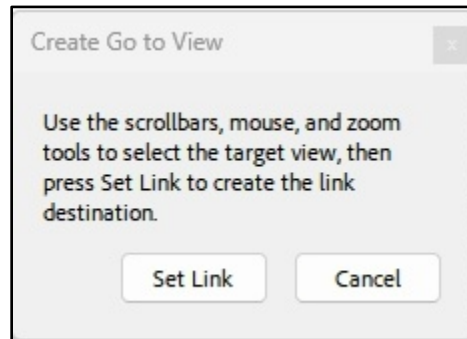4. Then click on the **Set Link button**.



FIGURE 18-9

Hyperlinks can be created for any page in your PDF, regardless of whether a bookmark exists.

# CHAPTER 20
# **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 Redact a PDF Tool

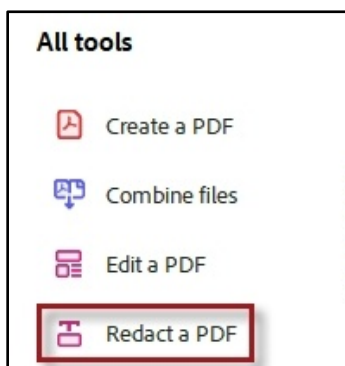Start by opening the **Redact a PDF tool** (see page 5).



FIGURE 20-1

## 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.
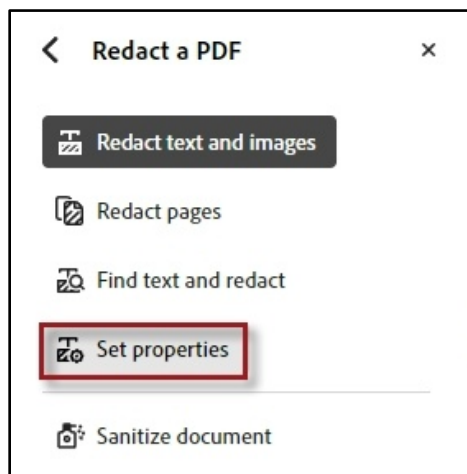


FIGURE 20-2

## 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**.
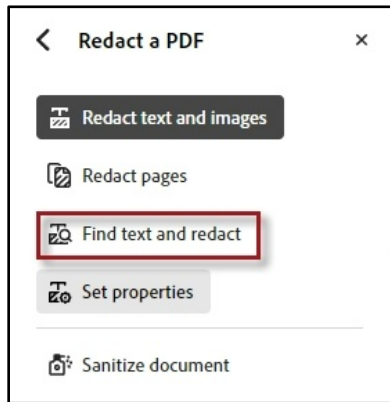


FIGURE 20-3

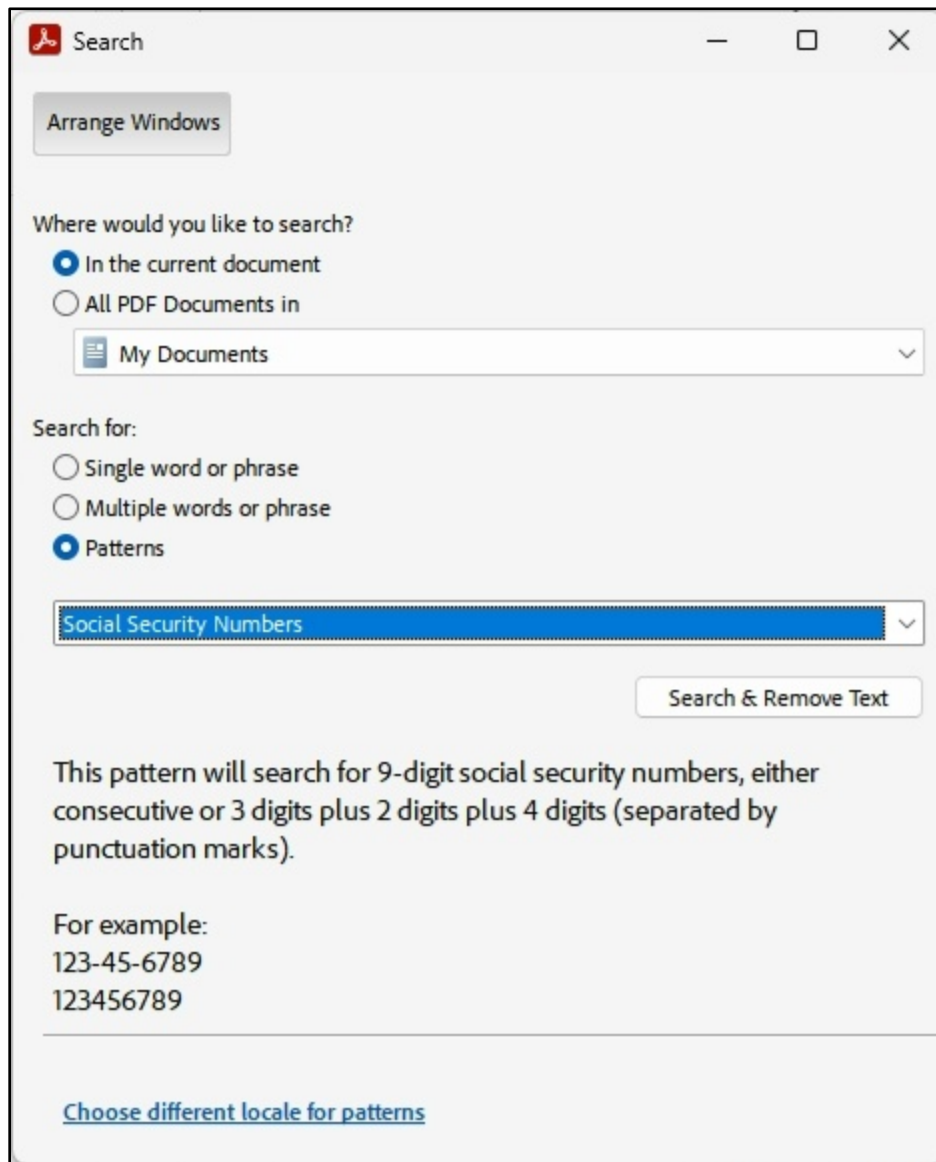2. Perform a search for the desired text, phrase or pattern.



FIGURE 20-4

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

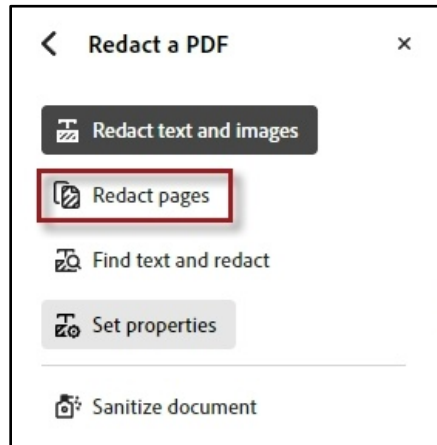Select **Redact Text & Images dropdown arrow ➜ Redact Pages**.



FIGURE 20-5

## Step 5: Apply Redactions

Once the redactions are marked, click on the **Apply button** at the bottom of the Redact a PDF pane to apply the redactions.



FIGURE 20-6

## 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 22
# ELIMINATING METADATA

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

1. Open the **Redact a PDF tool**.

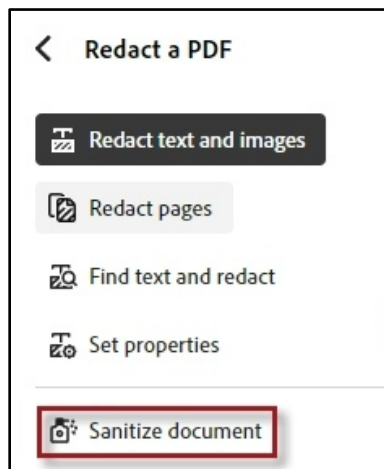2. Click on Sanitize document.



FIGURE 22-1
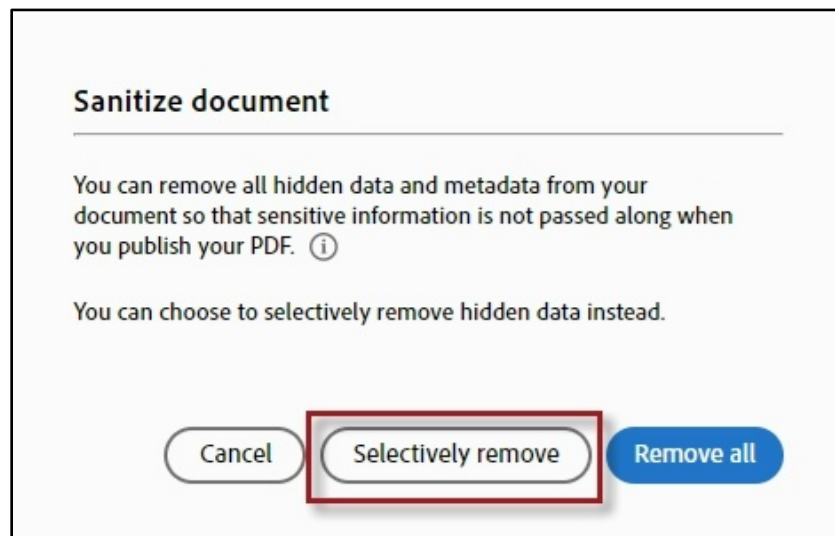
3. Click on the **Selectively remove** button.



FIGURE 22-2

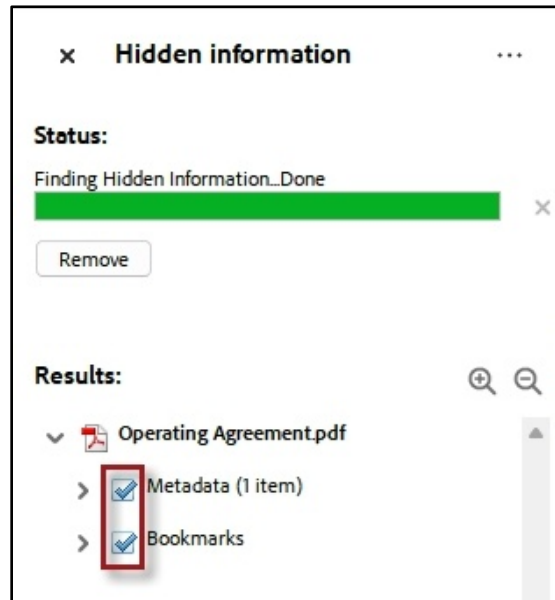4. Check the boxes next to the information you want to remove.



FIGURE 22-3

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

# CHAPTER 6
# 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 tool**.

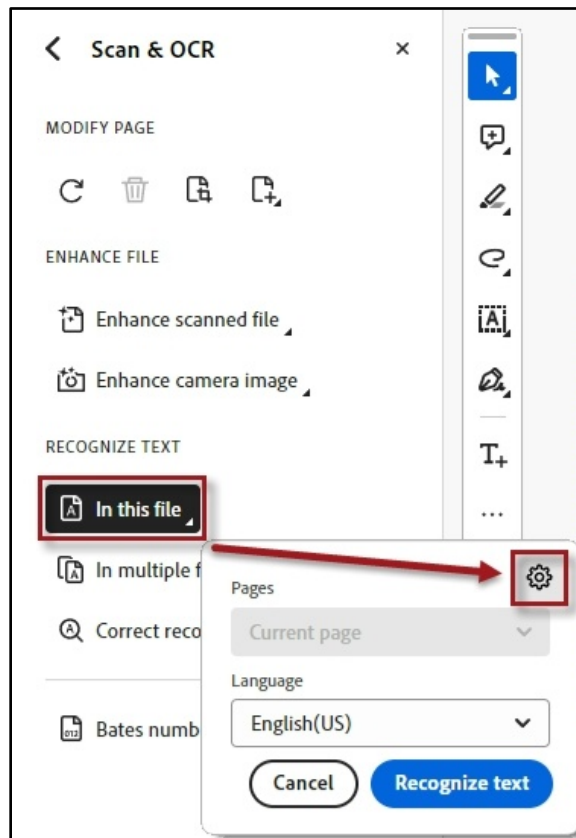2. Select **In This File** ➜ then click the **Gear button** (Settings) **.**

FIGURE 6-1

3. For **Output**, select **Editable Text and Images**. See page 36 for an explanation of why this is so important.
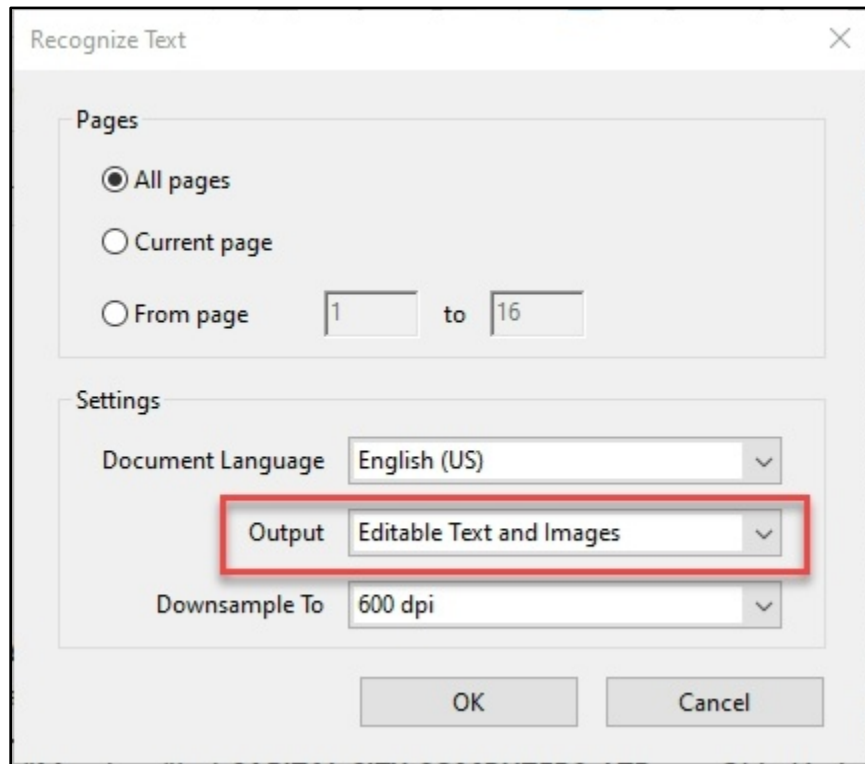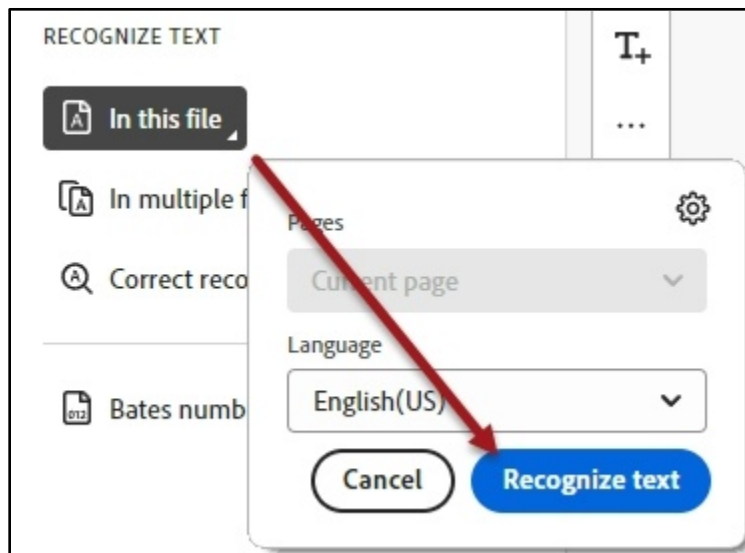


FIGURE 6-2

4. Click on **Recognize Text**.



FIGURE 6-3

# Batch Processing

You can OCR multiple PDF files at once.

1. Open the **Scan & OCR tool**.

2. Select **In Multiple Files**.

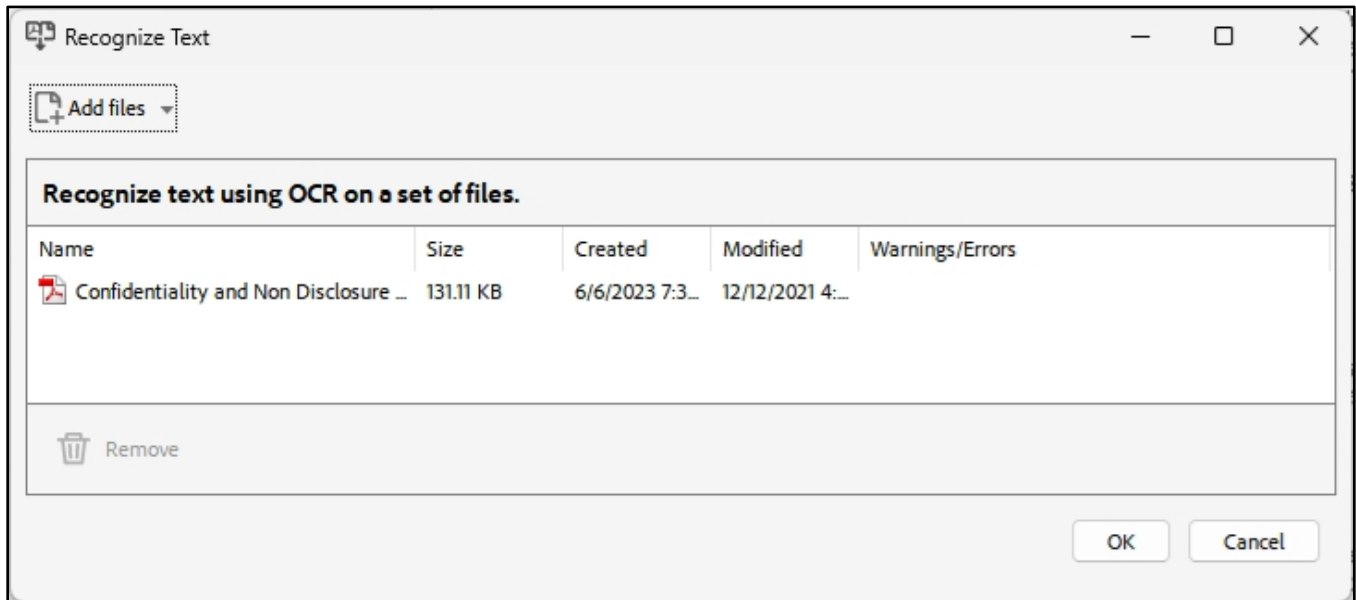3. Click on **Add Files...** to select the files to be OCRed.



FIGURE 6-4

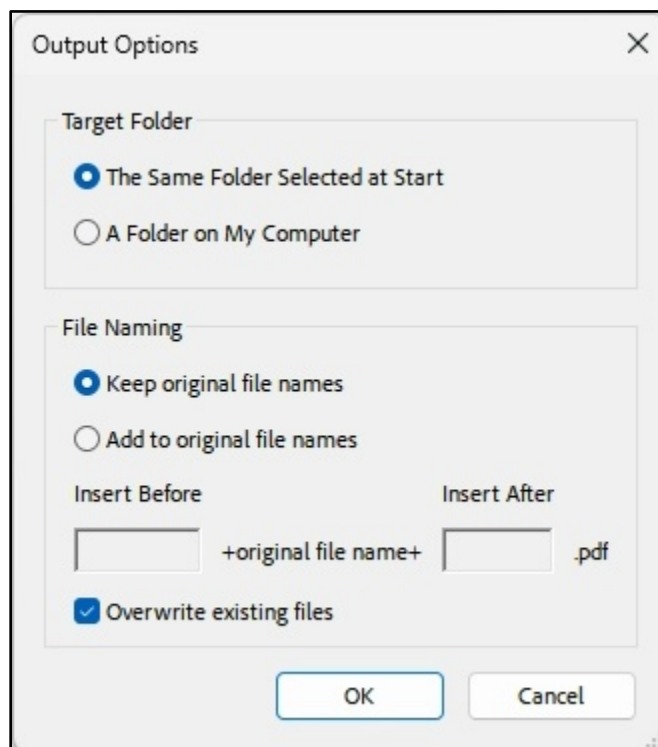4. Choose where to save the new files, how to name them, and whether to overwrite existing files.



FIGURE 6-5

5.  Click **OK**.

6.  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%.
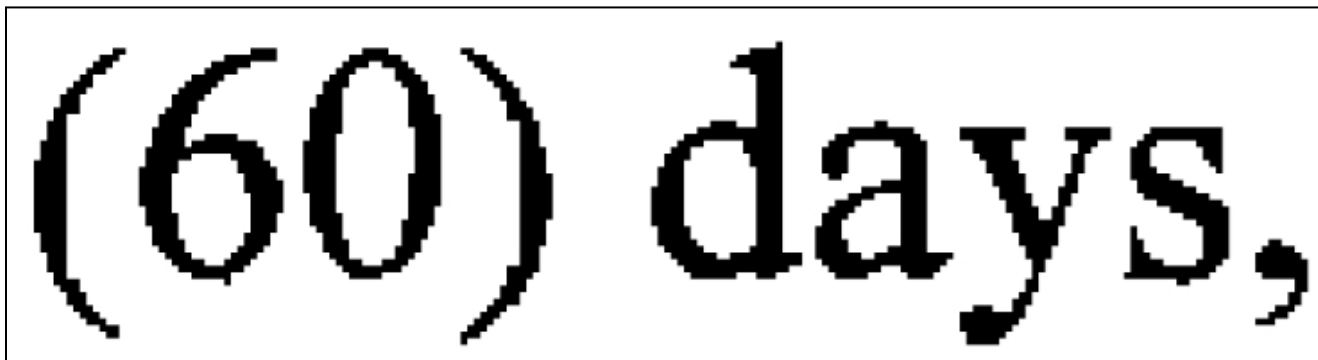


FIGURE 6-6

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 6-7

QUESTIONS?

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