



Is Acrobat Really Necessary?

Twenty years ago, creating a PDF required Adobe Acrobat. Today free or low-cost third party PDF writers are abundant and PDF generation is built into traditional and online office suites. With a price tag starting at \$299 for Standard and \$449 for Pro, is Acrobat really necessary? The answer is yes! Here are just a few ways I use Acrobat Pro every day to make my life easier. All features are available in Standard and Pro versions unless otherwise noted.

Document Assembly

I often have the need to combine documents, typically for presentation material. I use the “Combine Files” command and am also a master of inserting, deleting, and extracting pages using the Document menu. I can’t imagine the tedium of doing this without Acrobat.

Page Numbering

I love this feature of Acrobat and use it all the time in conjunction with document assembly. Once I’ve created a master PDF, I add a footer with automatic page numbering. Choose Document > Header & Footer > Add... Take the time to peruse your options here: you can enter your own header or footer text (left aligned, center aligned, or right aligned), insert page numbers, insert a date, specify the pages to be numbered, choose fonts, formats, and margins. No room to squeeze in a header or footer? Click on the link [Appearance Options...](#) and check: “Shrink document to avoid overwriting the document’s text and graphics,” then click OK. Save your settings to quickly apply header and footer schemes to future PDFs. Far superior to running pages back through a printer to apply numbers (or worse – and yes, we did this – applying numbered labels to the bottom of every page.)

Document Comparison

How would you compare documents if you didn’t have access to the authoring application? Print and carefully examine hard copies? Enlist someone in your office to read aloud while you followed along? Believe it or not, this is what we did in the not-so-distant past. Fortunately, Acrobat Pro has built-in document comparison. Choose Advanced > Compare Documents to

easily view changes to text, new pages, or moved pages. Summarize any changes as document annotations.

Comment and Markup

Ever wish you could draw a client's attention to key parts of a document without changing it's content? Acrobat Pro offers 20 different commenting and markup tools. I've used almost all of them at one time or another – from highlighting scanned text to drawing arrows or adding callouts or sticky notes. I often find myself in a situation where I've been given a PDF, have no access to the original document, and need to supplement it in some way. Choose Tools > Comment & Markup to see all the options. By enabling Adobe Reader rights (only available in Acrobat Pro), recipients who have the free Reader software can participate in document markup. Accept, reject, filter, sort, search, or print comments by choosing Review & Comment > Comment View.

Watermarks

If you don't already have a watermark in your native document, you can easily create it in Acrobat. Choose Document > Watermark. Begin typing text, such as "Draft" or "Confidential." As with page numbering, take your time to explore all the options here, such as rotating the watermark, choosing colors and fonts, or setting the opacity so your watermark does not obscure your document. If you want to use a logo or other graphic, choose File, then browse to locate the desired image. I used Snagit to grab our Web site banner, then inserted it as a watermark at 45°. An opacity of 25% seemed to work well – the watermark served it's branding purpose without obscuring the document text. To quickly reapply watermarks to future PDFs, save your settings.

TouchUp Text and TouchUp Object Tools

While you can't do much editing of PDFs, you can do a little and these are the tools I use. If I receive a PDF, need to fix something small, and don't have access to the original, I can try to touch it up. Choose Tools > Advanced Editing.

Redaction

With Acrobat Pro redaction is incredibly easy. Select images or text manually, provide Acrobat with word lists, or use established patterns to find and redact Social Security numbers, e-mail addresses, telephone numbers, credit card numbers, and other personal information. Redact entire pages if necessary. Choose Advanced > Redaction to get started.

Always make a copy of your document before proceeding. Once redactions are applied, they are permanent. In my mind, this is the only way to redact and be 100% certain the information is truly gone. I use this feature regularly with electronic court notices that contain information on more than one case. It's easy to create multiple PDFs (one for each client), then redact as needed to protect client confidentiality.

Metadata

Want to see if a document contains any metadata? Choose Document > Examine Document. To examine every PDF automatically, specify that option: choose Edit > Preferences, and select Documents on the left. Under "Examine Document" check "Examine document when closing document" or "Examine document when sending document by e-mail." Note: Acrobat removes

additional items automatically whenever metadata is scrubbed, so read up on this feature before using it.

Bates Numbering

Remember the old Bates stampers? I can still hear the sound of the stamp hitting page after page. And if you set it incorrectly, you had to scrap your bates copies and start all over again. No more! Choose Advanced > Document Processing > Bates Numbering. (Enhanced features are available in Acrobat Pro.) It couldn't be any easier.

PDF Portfolios for Communicating with Clients and Branding Your Firm

A portfolio is an interactive PDF with a welcome page which includes your logo, photograph, text about you, contact information, and a welcome message. Simply add documents to the portfolio, choose how the documents should be displayed, and create a color scheme. The interface is very intuitive. Leave Word and Excel documents in their native format, or quickly convert them to PDF inside the portfolio. Secure, if desired, and you're ready to go. The result: a personally branded PDF that can easily be sent as a single e-mail attachment. I maintain several portfolios which I use to distribute frequently requested information. This feature is available only in Pro.

Creating Forms

I maintain a library of about 25 fillable PDF forms, some of them quite complex. But don't be intimidated. With a little patience and the Acrobat Forms wizard, you can create your own. Choose Forms > Create New Form and give it a try. It won't find every field and may suggest some that you don't need, but clean-up isn't too bad. Think of the potential if you could master this feature: fillable intake forms for clients, fillable checklists for you and your staff, fillable memos to the file. The best way to go paper-less is to avoid creating paper in the first place, and fillable PDFs go a long way toward achieving this goal. (Advanced forms tools available in Pro only.)

Completing Forms

Even if you don't create forms, Acrobat makes filling them out substantially easier. You can take a fillable form from any source and save it to your local hard drive to complete later. This isn't true with the free Reader software unless the form author enabled Reader rights. And of course not all PDFs are fillable. If you encounter a nonfillable form, just use Acrobat's typewriter tool to fill it in anyway. Choose Tools > Typewriter.

File Splitting for e-Court Compliance

File Splitting is a handy feature for any practitioner who does e-filing. Most electronic filing gateways in state and federal courts place a limit on the size of document you can upload in one session. This feature allows you to split one large document into multiple documents by number of pages, file size, or top-level bookmarks. Each resulting part is identified in order, such as Part 1 – Plaintiff's Amended Complaint, Part 2 – Plaintiff's Amended Complaint. (Acrobat supports other settings which help with file size optimization, another key to e-Court compliance.)

Scanning Directly from Acrobat

I prefer to scan directly from Acrobat whenever possible. I can automatically optimize, deskew, OCR, and apply ClearScan which improves text quality and decreases file size. Choose Create PDF > From Scanner... There are two Options buttons in the Acrobat Scan dialog box. Be sure to click both and customize as needed. Once preferences are set, Acrobat will apply them automatically to all future scans.

E-Mail Archiving or Saving the Best for Last

This is another feature I love in Acrobat, and most people are impressed when they try it.

When Acrobat is installed, two buttons are automatically added to Outlook: "Create Adobe PDF from selected messages" and "Create Adobe PDF from folders." Choose the appropriate button, and follow the on-screen prompts to create a PDF e-mail archive. Acrobat automatically captures associated attachments. The resulting PDF has a header with all the typical e-mail message fields (From, Subject, Date, etc.) (To see other fields, right-click in the header and choose View...) Each of these represent an opportunity for sorting. Filtering is also supported. Under the header is a summary of each e-mail – hyperlinked so you can jump directly to the message. I use this feature to archive the e-mail from our Web sites.

Conclusion

Believe it or not, this is a *brief* overview of my favorite features of Acrobat Pro. There is much more to explore and learn, and no other PDF product on the market offers all these tools in one package. Doubting Thomases can download a fully functional 30 day [trial version](#) from Adobe or [compare](#) all three versions of Acrobat side-by-side. If you are looking for a scanner, keep in mind that many [Fujitsu](#) models come with Acrobat Standard (which can be upgraded) or Acrobat Pro.

To learn more about Acrobat, visit [Acrobat for Legal Professionals](#), the [Adobe Resource Center](#), [Planet PDF](#), [Adobe Acrobat User Community](#), and [Adobe Press](#). On Twitter, follow @acrolaw, @Acrobat_GU, @acrogirl, @acroboy and @acro_dave.

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