



Companion Instructional Guide



Adobe Acrobat for Attorneys

Objective

This CLE is designed to teach attorneys how to work more efficiently with PDF files utilizing Adobe Acrobat XI Pro.

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Suggested Readings

Adobe Acrobat X PDF Bible - ISBN 0470612916 Padova, Ted, Indianapolis:

Wiley Publishing, Inc., 2011

Adobe Acrobat XI Classroom in a Book - ISBN 0321886798 Adobe Creative Team,

Berkeley: Adobe Press, 2012

Links

Adobe Official Website: www.adobe.com

Acrobat for Legal Professionals Blog: blogs.adobe.com/acrolaw/

Our Trainer



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Julianne Nachtrab is the National Training Manager for Barkley Court Reporters. Julianne has been in the Employee Training and Communications field for more than 15 years, working for Aon Risk Services, ING, DirecTV, and DaVita Healthcare Partners. She currently serves as consultant to the Education Taskforce of the Licensing Executives Society International, where she works with attorneys across the globe to define and implement educational strategies for the transfer of technologies.

For Barkley, Julianne conducts training seminars in Adobe Acrobat, deposition and trial technologies, realtime software utilization, electronic exhibits, and mobile technologies for the legal profession. She graduated from Northwestern University with a degree in Communications and holds a Master's in Educational Psychology and Instructional Design from the University of Southern California.

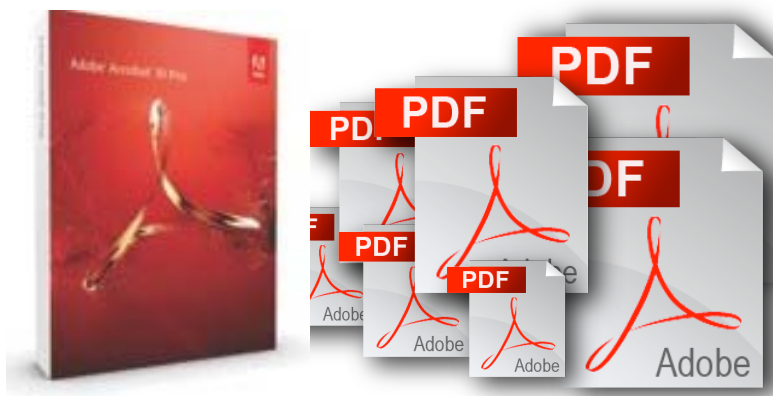
I. Introduction: Why PDFs Are Important to Attorneys

PDF stands for Portable Document Format. PDF is an open standard that has been around for more than 15 years. PDFs run on any computer system (Windows, Mac, Linux) and most mobile platforms.

PDFs are important to attorneys because:

- PDFs are the universal format for sending documents electronically, allowing for easier collaboration on contracts and legal documents.
- PDFs are the accepted standard for e-filing in local and federal courts across the country.
- Converting a document to PDF creates an exact one-to-one copy of the original for sending to others so that, "What You See is What They Get." Because PDFs retain their formatting, the contents look the same to the person receiving it as it does to the person sending it.
- A level of security can be added to PDFs and any changes detected, enabling attorneys to better ensure the integrity of the content they create, receive, and submit to court.
- Adobe Acrobat provides search features for assessing content and context, including advanced Boolean, proximity, and metadata searches.
- PDFs enable attorneys to redact, Bates number, and adhere to other legal guidelines when creating documents for court.

Because PDFs have been an open standard since 2008, many applications use this format. The real advantage of this open format is that it ensures that if something were to happen to Adobe, you would be able to use another application to view your PDFs. This has made the format ideal for archiving legal documents. In fact, there is a specific subset of PDF designed for archiving, called PDF/A.

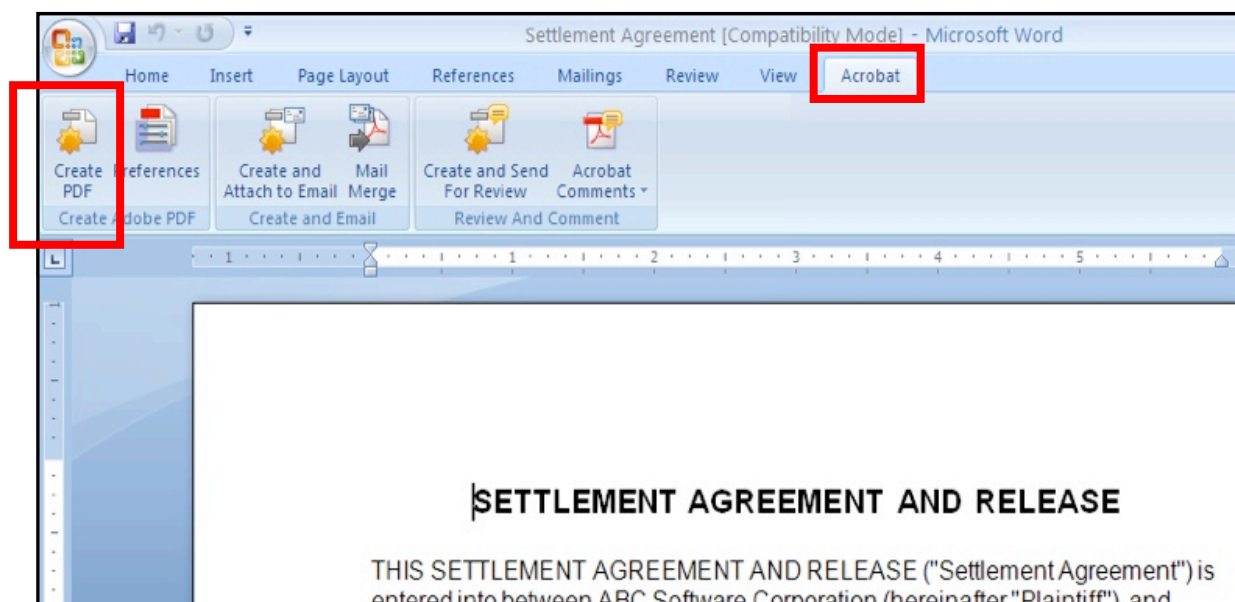


Adobe Acrobat is used to create, modify, and work with PDF files. Acrobat is used *after* a document is authored in an application, such as MS Word or WordPerfect.

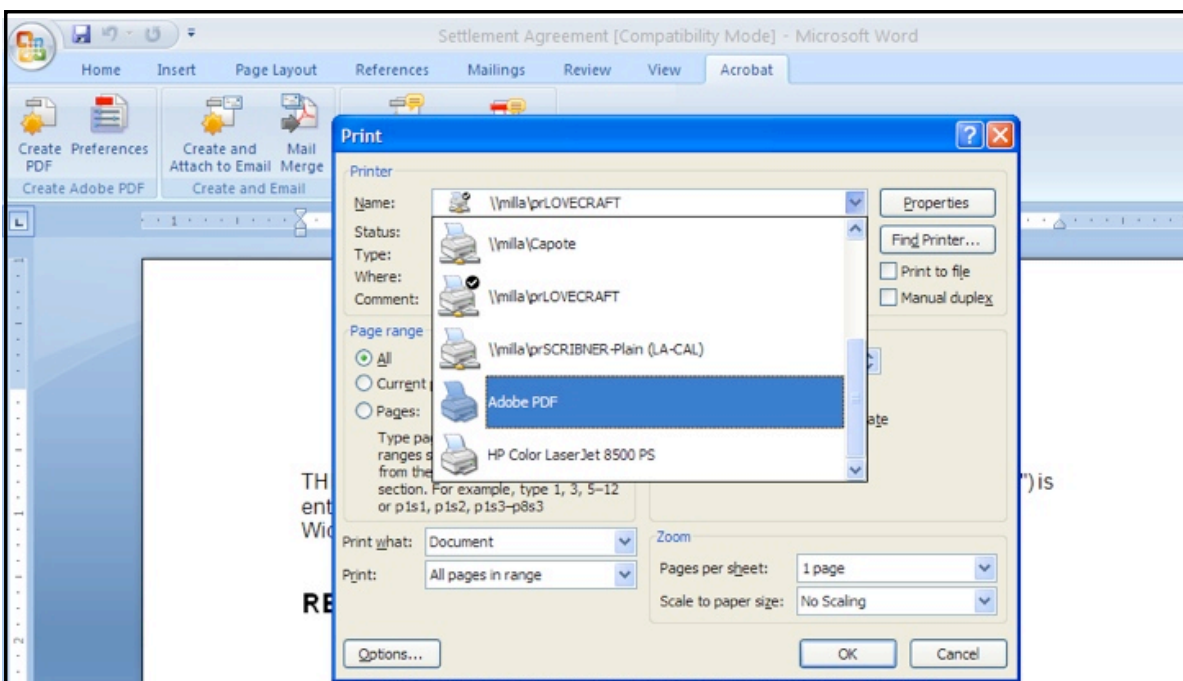
2. Converting Documents to PDF

There are two quick and simple ways to convert documents to PDFs using Adobe Acrobat:

1. When a full version of Adobe Acrobat is installed, it adds an Acrobat tab (Office 2007 or later) to the ribbon at the top of your software program. Click **Create PDF** inside the Adobe Acrobat ribbon, select where to save the PDF, and a PDF of the original will be created with bookmarks.



2. A PDF printer driver also is installed with the full version of Acrobat. This allows the user to 'print' to PDF from inside any program.

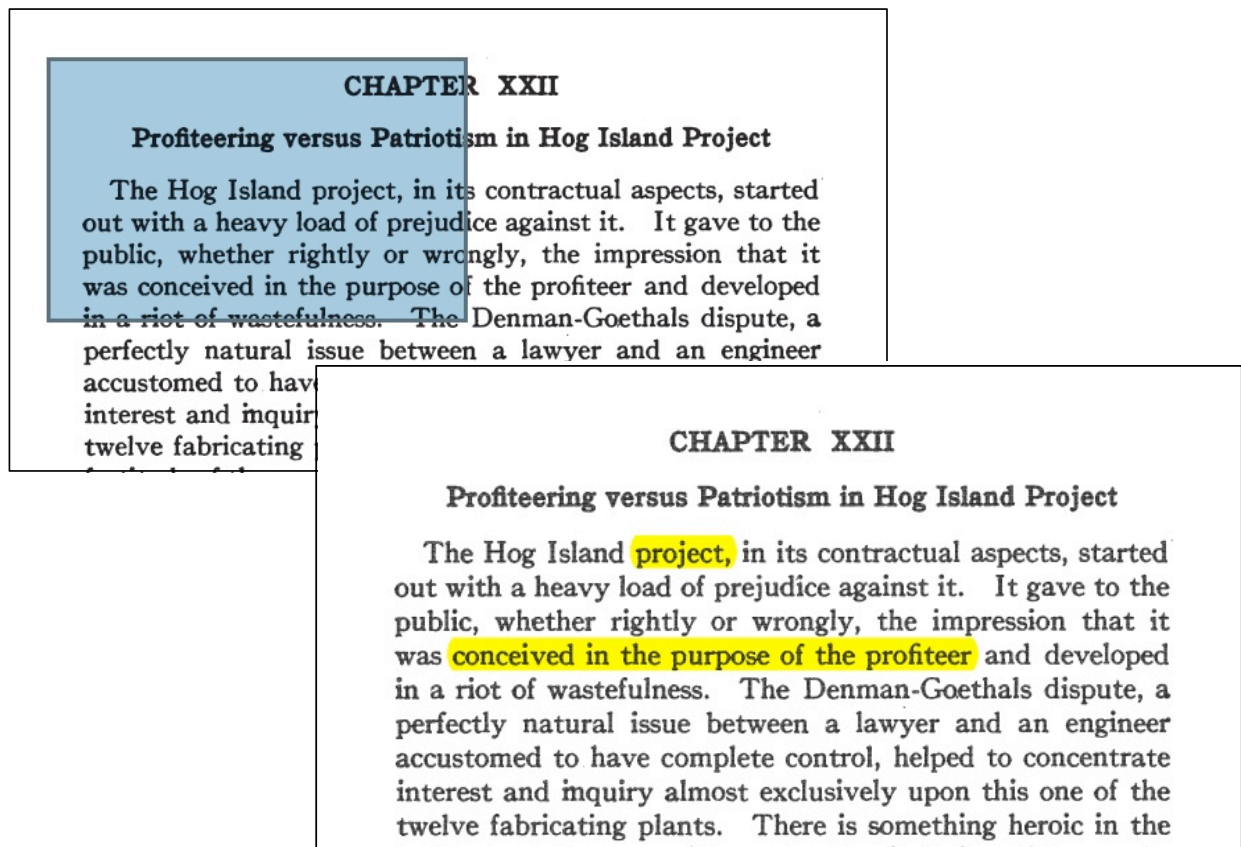


3. OCR'ing PDFs (Text Recognition)

TOOLS → TEXT RECOGNITION → IN THIS FILE

Documents gathered in a case often are scanned into the computer. Scanning a document creates a digital image of the original content. If a PDF was created from a scanned file, Acrobat Acrobat sees the content on the pages of that file as consisting only of pictures, even though the original content may have included text. In order for Acrobat to be able to read any text on the page, the PDF must first be "OCR'd." OCR stands for Optical Character Recognition, which is a fancy way of saying that text recognition software must be used to figure out the letters of text contained in what Acrobat sees as images. Adobe Acrobat XI Pro refers to this process as "Text Recognition." Older versions of Acrobat call it, "OCR."

How do you know when a PDF was created from a scanned document? A blue box appears when trying to work with the text. Once a PDF of a scanned document has been OCR'd, the text can be searched, copied, and edited.



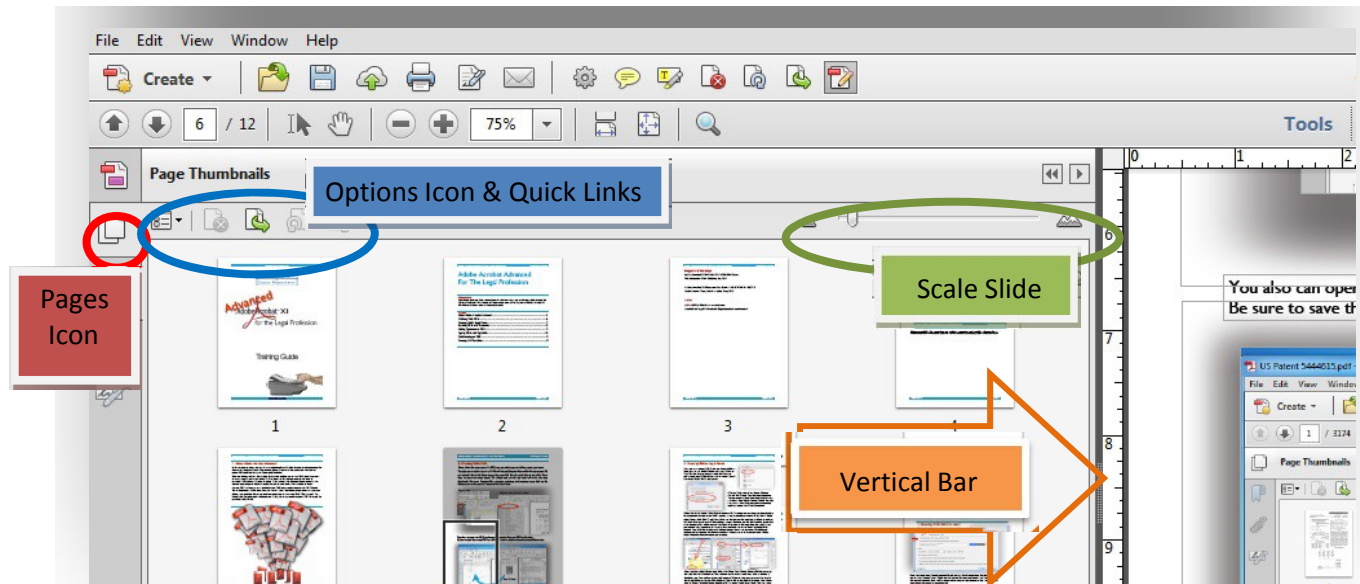
Click on **Tools**, then **Text Recognition** to select **In This File**. A **Recognize Text** popup displays. Click **Ok**. With Text Recognition, Acrobat analyzes the digital picture for key strokes that may be text and converts the image accordingly. When the OCR process is complete, Adobe no longer sees the content as just an image--it reads the text.

Adobe's OCR feature is not as fast or full featured as a production-grade program, like Kofax & Abby. But it is useful for small-scale projects. Keep in mind: Because text recognition works to "figure out the letters," there may be instances where key strokes are not clear, causing Acrobat to substitute the wrong letters. Be sure to copy edit all of OCR'd PDFs.

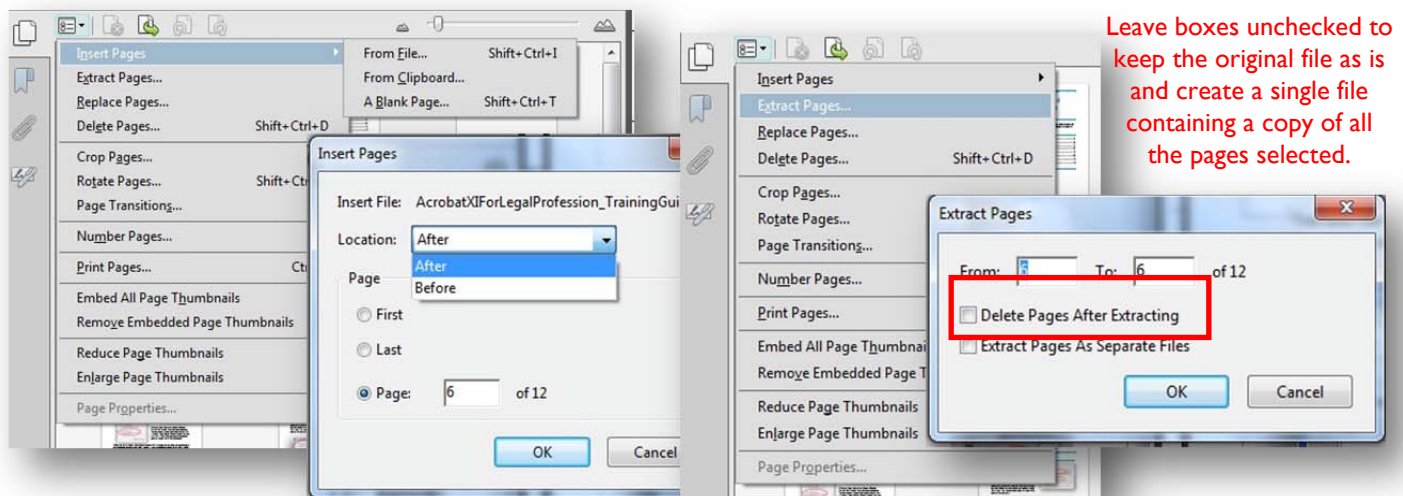
4. Organizing Pages in PDFs

PAGES ICON →

The Pages Pane enables content within a PDF to be quickly organized and reviewed. To get started, click on **Page Thumbnails** icon in the upper left corner, just below the ribbon. Thumbnails of each page display in the left column. Drag the **vertical bar** to right, and the thumbnails display as if on a photographer's lightboard. Re-arrange the pages of content by selecting and dragging the appropriate thumbnail(s) into their proper order. To better see the contents on a page, select the thumbnail and the page displays on the right, or use the sliding scale at the top right to enlarge the view of thumbnail within the Pages Pane.



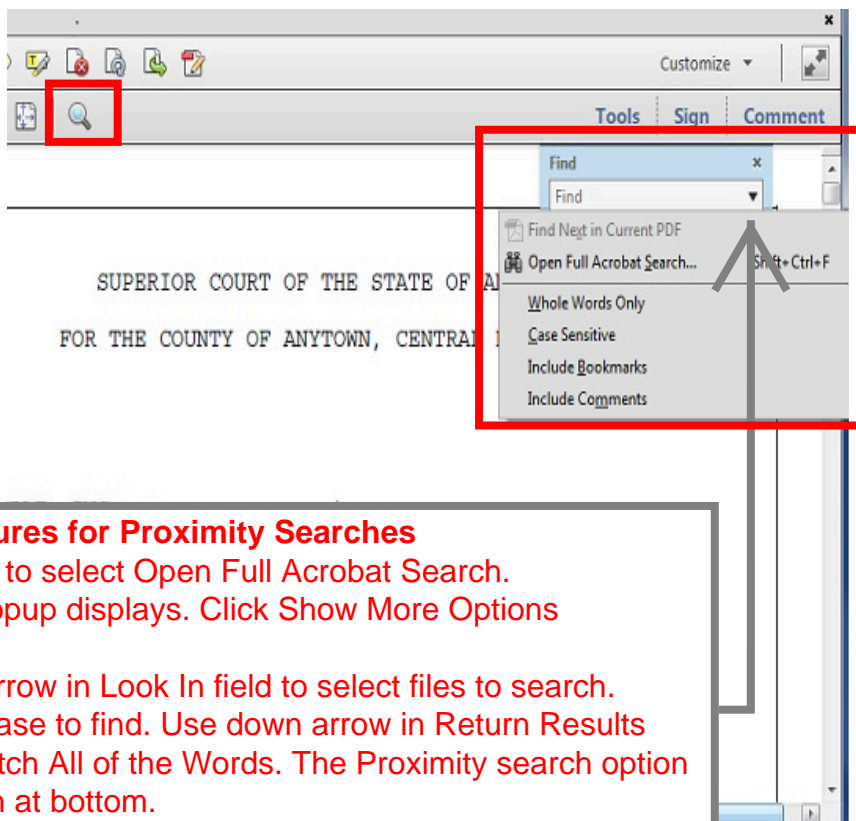
To insert a page from another PDF or to rotate a page to accommodate the page orientation, use the quick links at the top of Pages Pane. To extract, replace or crop pages, click on the **Options** icon in upper left corner of Pages Pane, select the function needed, and follow the prompts. Using the Options icon to Insert information allows for quickly adding blank pages and web content saved to your Clipboard.



5. Searching PDFs

Press CONTROL+F or select the magnifying glass in the ribbon.

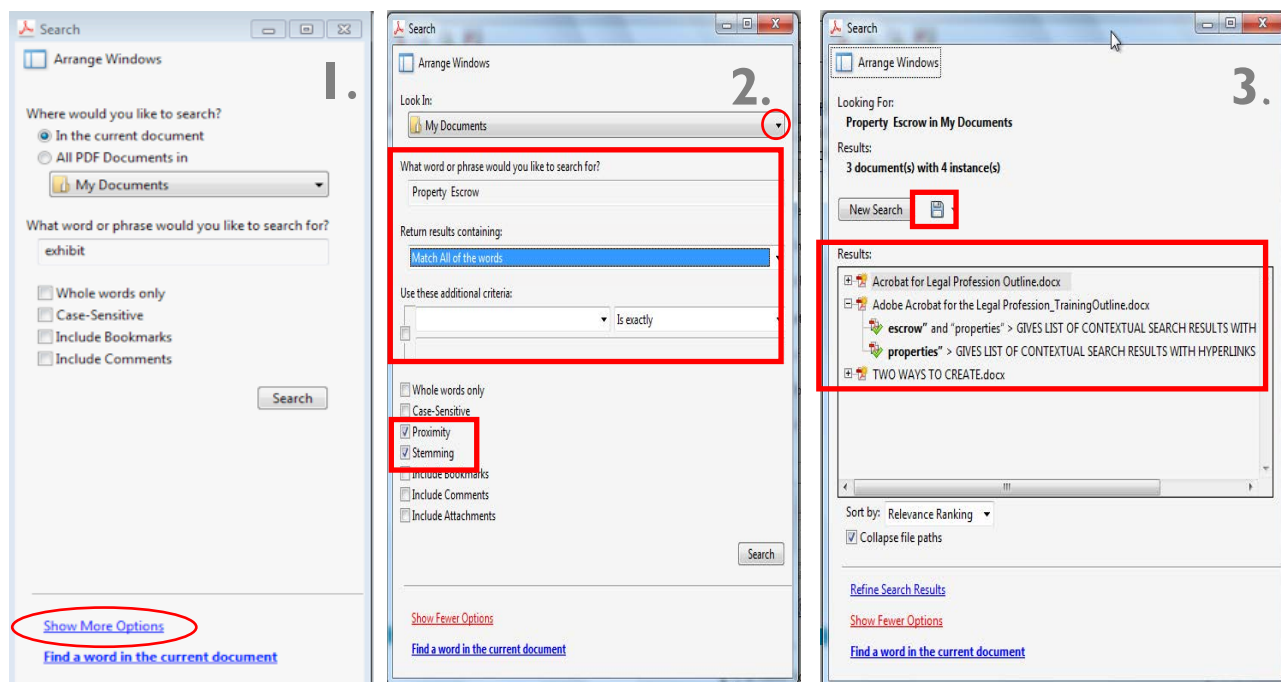
In the **Find** popup that appears in the upper right corner, type in the white text field the keyword you wish to find. Press **Enter**. Use the **Previous** and **Next** buttons to scroll through use of that keyword in the PDF. Use **Replace With** option to quickly change or swap words throughout the PDF.



Using Advanced Search Features for Proximity Searches

Click down arrow in Find popup to select Open Full Acrobat Search.

- 1) Search/Arrange Windows popup displays. Click Show More Options at bottom.
- 2) On next screen, use down arrow in Look In field to select files to search. Then enter key words or phrase to find. Use down arrow in Return Results Containing field to select Match All of the Words. The Proximity search option is autochecked. Click Search at bottom.
- 3) Results appear in separate popup. Scroll through list of usage or click on disc icon to save list as a separate PDF.



6. Copying Content in PDFs

EDIT→ COPY→ THEN EDIT→ PASTE or ALT

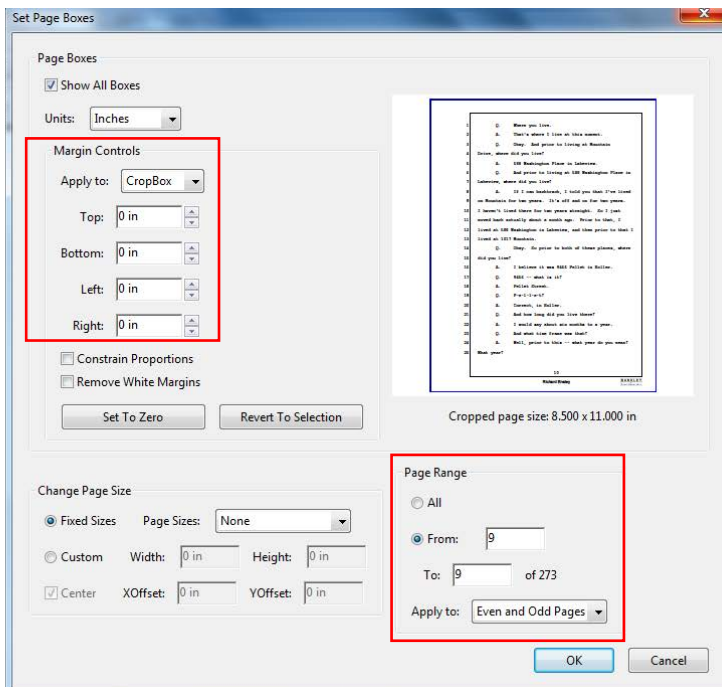
To copy information from inside one PDF to another, simply highlight the content, then click on **Edit** to select **Copy**. Open new document (or scroll to where you want text to appear within that PDF) and click on **Edit** then **Paste**. Be sure to **Save** your changes.

When working with PDF Transcripts, testimony can be copied to another document without carrying over the line numbers. Start by pressing and holding down the **ALT** key. A box appears and expands as the cursor is moved to select the contents to be copied. All the contents within that box becomes highlighted and will be copied. Click on **Edit** to select **Copy**. Open a new document, or locate place within PDF that you want to paste this information, and click on **Edit** again and then **Paste**. The information from one part of a PDF is now copied to another part of your PDF or to a new document altogether.

7. Cropping Content in PDFs

TOOLS→ PAGES→ CROP→ DOUBLE CLICK ON PAGE
OR
PAGES ICON→ OPTIONS ICON → CROP

Acrobat enables select parts of a page to be copied by cropping out information on that page. Start by clicking on **Tools** to select **Pages**, then **Crop**. Next, double click anywhere on the page in the PDF, and the **Set Pages Box** popup displays. Alternately, click on the **Pages** icon, then the **Options** icon to select **Crop**.



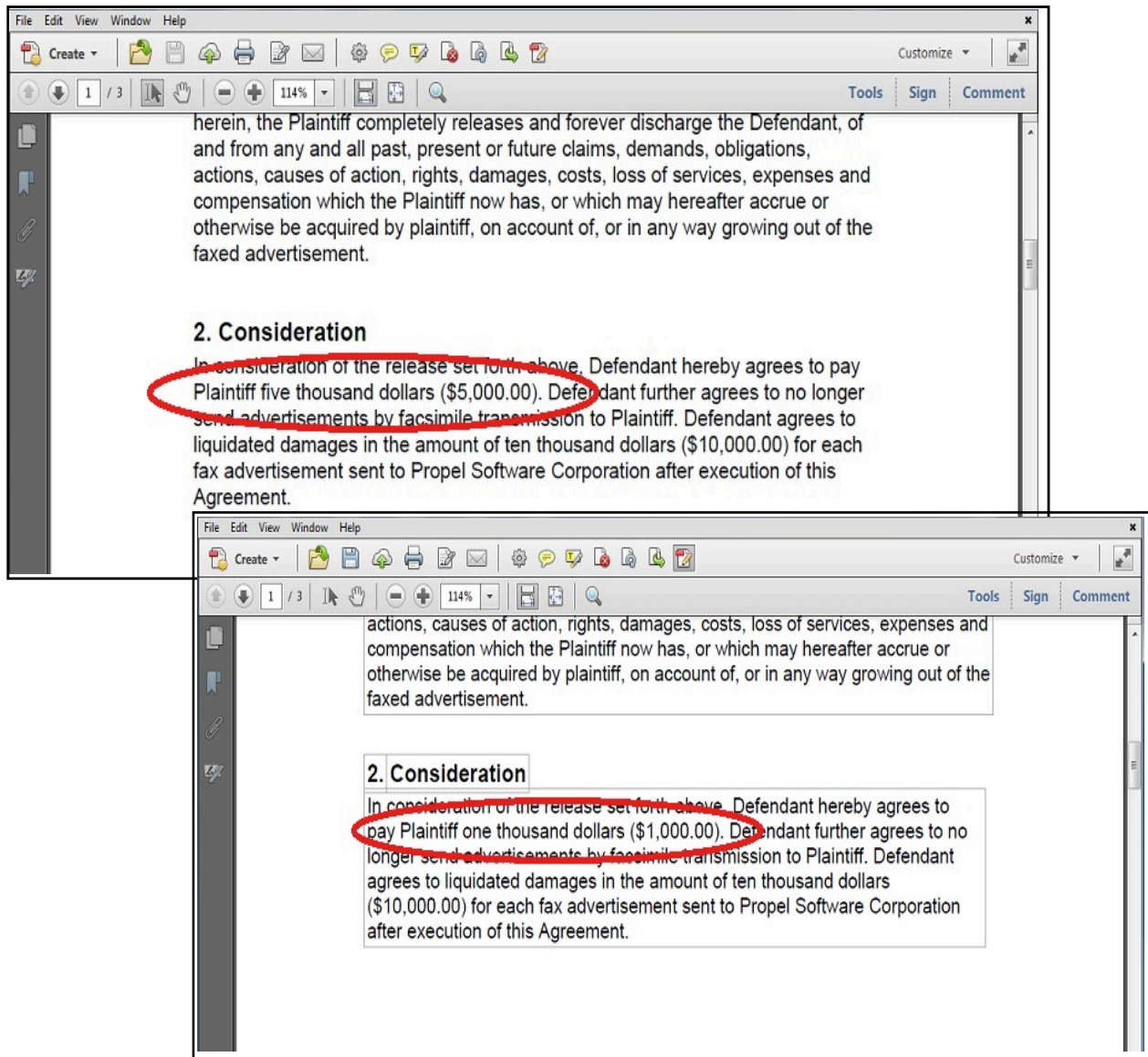
Under **Margin Controls**, use the **Apply To** dropdown arrow to select **CropBox**. Then use the arrows for each margin to crop out information that is not needed. Next, enter the Page Range (which and how many pages) in the lower right corner. Click **Ok** at bottom.

All the information outside the crop box will be cropped out so that only the content selected remains. Save the document to retain this change or use **Extract** option inside the **Options** icon to export this information as a separate file.

8. Editing PDFs

TOOLS → CONTENT EDITING → EDIT TEXT & IMAGES

It's a common misconception that once a document is converted to PDF, it cannot be changed. Of course a locked and signed or certified PDF will no longer be valid if it has been changed using other software, but this does not prevent a user from changing information in the PDF with the **Edit Text & Images** tool. Especially small changes that often are not immediately visually apparent are easy to make--and even just a small change can make a big difference, like this example:



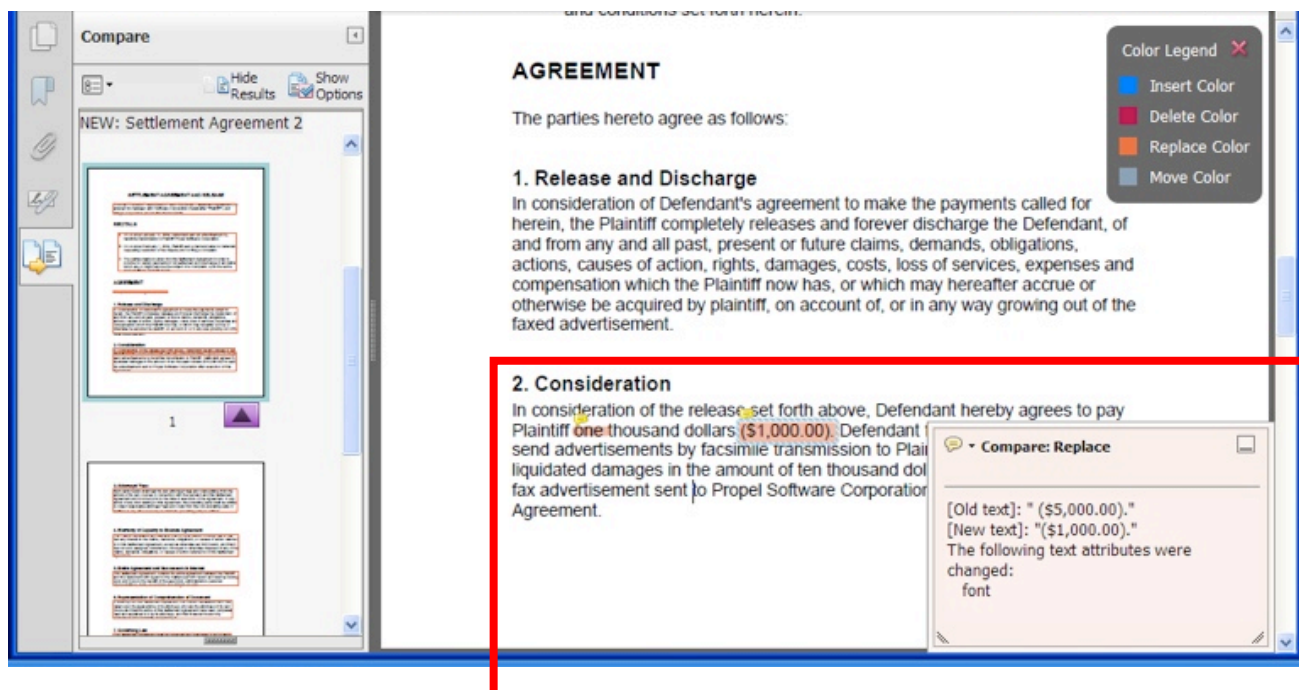
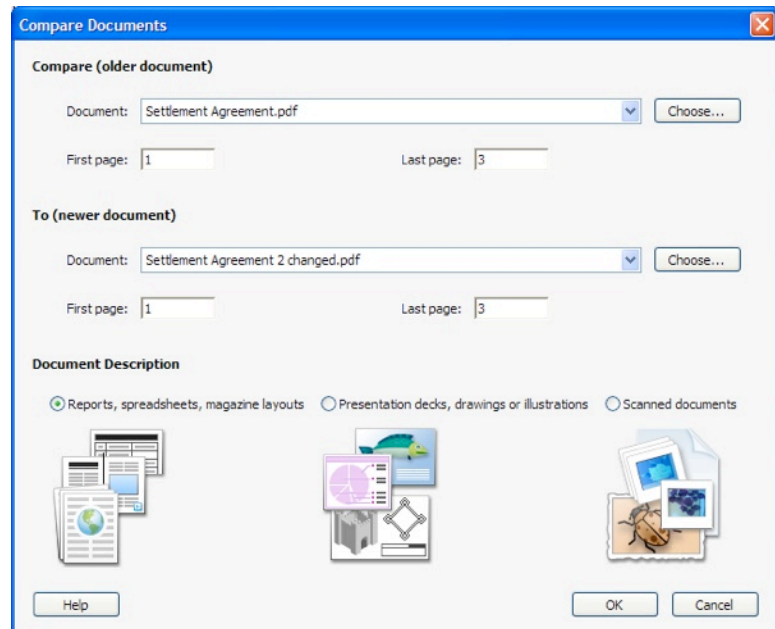
Now with Adobe Acrobat XI, extended amounts of text can be changed and even added. In fact, entire paragraphs can be moved. Check mark the **Outline Text & Images** box under **Format** in the **Content Editing** pane to see the blocks of text on the page. Select a box and drag and drop it to re-arrange entire paragraphs of information. Use **Edit Text & Images** to make changes, and use **Add Text** or **Add Image** to insert more content.

9. Comparing PDFs for Changes

VIEW → COMPARE DOCUMENTS

If a PDF was sent to opposing council for signature, you can verify whether or not the content was changed. Use the **Compare Documents** feature to check the signed PDF against the original (the original and one sent for signature) for changes.

Remember: Even the smallest change can make a big difference!



Click on **View** in the ribbon to select **Compare Documents**. Use **Choose** button to select original and latest version of the file from your computer. Click **OK**. If the newer PDF contains changes, Acrobat outlines the changes on a summary page as well as notes each change throughout the PDF as shown above.

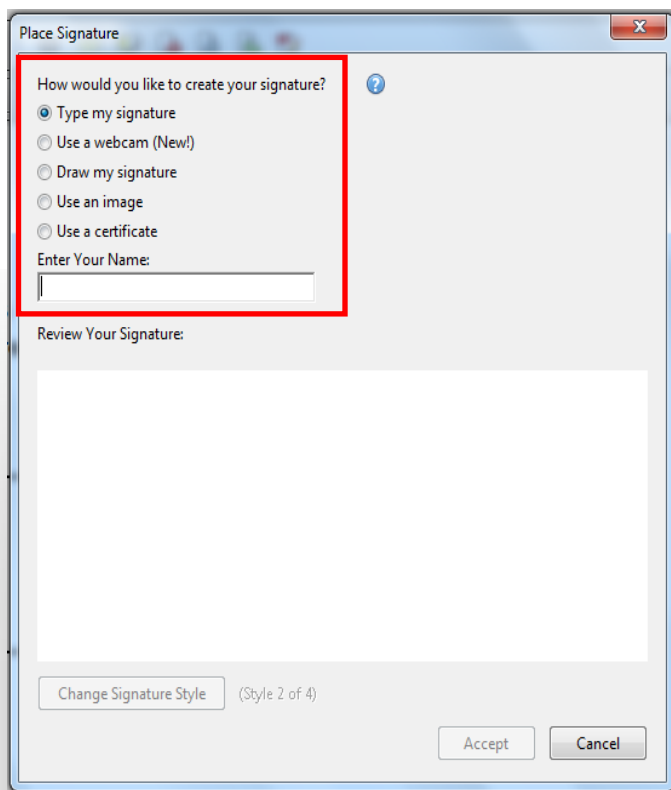
10. Adding Your Signature to a PDF

SIGN → I NEED TO SIGN → PLACE SIGNATURE

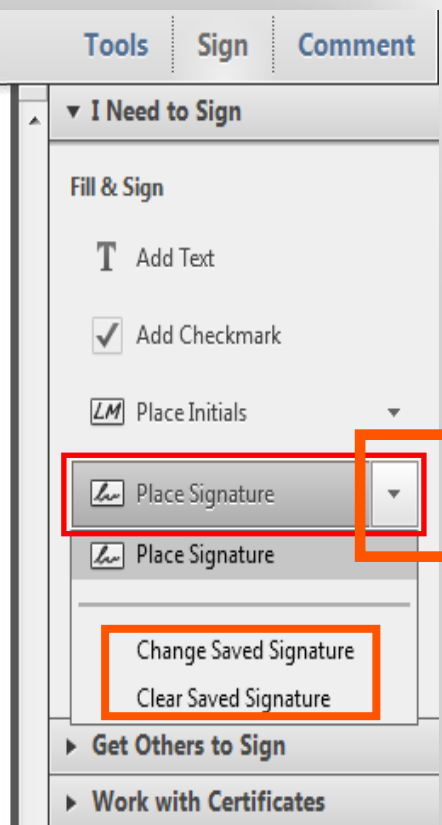
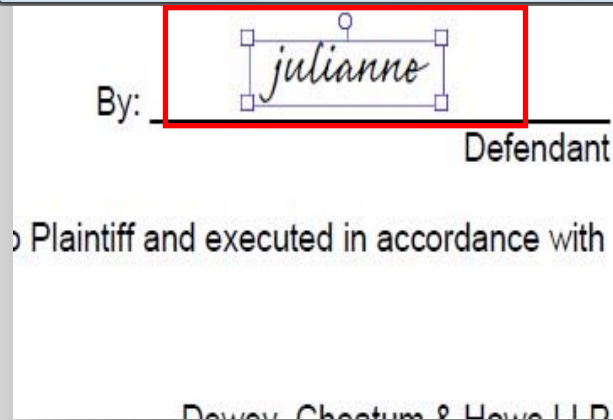
With Acrobat XI Pro, you can draw, type, or import an image of your signature in order to sign a PDF. Click on **Sign** in upper right corner, select **I Need to Sign**, then **Place Signature**.

When using Acrobat to sign a PDF for the first time--or if the last signature was changed or cleared, the Place Signature dialogue box opens. Choose whether you want to type, draw, or import an image of your signature, then follow the prompts.

If your signature has already been created, just position your cursor where you want to sign and click. Use side bars around your signature to adjust the sizing. **The down arrow to the right lets you change or clear your signature, which you will want to do if others use your computer.**



If you do not clear your signature after signing a PDF, Acrobat will default to using that same signature the next time a signature is applied to a PDF.



II. Adding a Digital ID to Sign a PDF

SIGN → WORK WITH CERTIFICATES → SIGN WITH CERTIFICATE

Acrobat XI Pro also enables you to sign using Digital IDs or Certificates, just like Acrobat X and 9 Pro. Click on **Sign**, then **Work With Certificates**, and select **Sign With Certificate**. Use **Drag New Signature Rectangle** button to designate where and how large your Digital ID should appear. A **Sign Document** popup displays. Click down arrow in **Sign As** field to choose from your digital IDs, refresh existing ID, or create new one. Follow prompts illustrated below to create a new Digital ID.

1. Choose New ID

Sign As: Julianne (Julianne) 2018.08.09
 Password: Nachtrab (Nachtrab) 2019.05.28
 Certificate: Refresh ID List
 New ID ...

Appearance: Julianne Signature

2. Choose to create new digital ID

I want to sign this document using:

- ☐ My existing digital ID from:
 - ☐ A file
 - ☐ A roaming digital ID accessed via a server
 - ☐ A device connected to this computer
- ☒ A new digital ID I want to create now

3. Keep the default option

Where would you like to store your self-signed digital ID?

- ☒ New PKCS#12 digital ID file
 Creates a new password protected digital ID file that uses the standard PKCS#12 format. This common digital ID file format is supported by most security software applications, including major web browsers. PKCS#12 files have a .pfx or .p12 file extension.
- ☐ Windows Certificate Store
 Your digital ID will be stored in the Windows Certificate Store where it will also be available to other Windows applications. The digital ID will be protected by your Windows login.

4. Enter personal information

Enter your identity information to be used when generating the self-signed certificate.

Name (e.g. John Smith): Julianne
 Organizational Unit: Training
 Organization Name: Barkley
 Email Address: juliannen@barkley.com
 Country/Region: US - UNITED STATES
 Key Algorithm: 1024-bit RSA
 Use digital ID for: Digital Signatures and Data Encryption

5. Choose secure location to save new ID

Enter a file location and password for your new digital ID file. You will need the password when you use the digital ID to sign or decrypt documents. You should make a note of the file location so that you can copy this file for backup or other purposes. You can later change options for this file using the Security Settings dialog.

File Name: J:\Users\juliannen\AppData\Roaming\Adobe\Acrobat\11.0\Security\Julianne.pfx
 Password:
 Not Rated

6. Select new digital ID using the Sign As dropdown

9. Effectiveness

This Settlement Agreement shall become effective on execution.

Dated: _____

Jennifer Bauer
 Digitally signed by Jennifer Bauer
 DN: cn=Jennifer Bauer, o=Barkley Court Reporters, ou,
 email=jennifer@barkley.com, c=US
 Date: 2019.04.20 19:30:08 -0700

Finish

12. Securing Signatures with Third Party Verification

SIGN → I NEED TO SIGN → SIGNED. PROCEED TO SEND

Adobe XI Pro integrates with EchoSign for third-party verification of digital signatures. You can sign the PDF before sending to others for signature or send to others first. Adobe EchoSign authenticates as well as tracks signatures for your records. Note: EchoSign is a subscription-based service, but Adobe allows limited number of uses before applying charges. Check Adobe EchoSign site for current rates.

To sign a PDF before forwarding to opposing counsel for signature, click on **Sign**, to select **I Need to Sign**. Add your signature. Click on **Signed. Proceed to Send**. Adobe EchoSign then walks you through the process of uploading and sending your PDF for signature(s).

The screenshot displays the Adobe Acrobat Pro interface with a PDF document titled 'Settlement Agreement.pdf'. A 'Deliver Your Signed Document' dialog box is open, indicating the document will be uploaded to Adobe EchoSign. The 'I Need to Sign' sidebar is visible, showing options like 'Add Text', 'Add Checkmark', 'Place Initials', and 'Place Signature', with the 'Send Signed Document' button highlighted in red.

Below the Acrobat window, the Adobe EchoSign interface is shown. It includes a 'Sign In' and 'Get Help' link. The main content area is divided into two sections:

**Complete Text Fields Below:
Get a Document Signed**

Your Email:

To:

[Show Cc](#)

Document Name: Settlement Agreement-signed

Message: Please review and sign Settlement Agreement-signed.

Settlement Agreement-signed.pdf
Upload complete.

☐ I have read and agree to the EchoSign [Terms of Use](#) and [Privacy Policy](#).

How EchoSign Works:

You Send

To have someone sign your document, complete the information in the form and hit Send.

They Sign

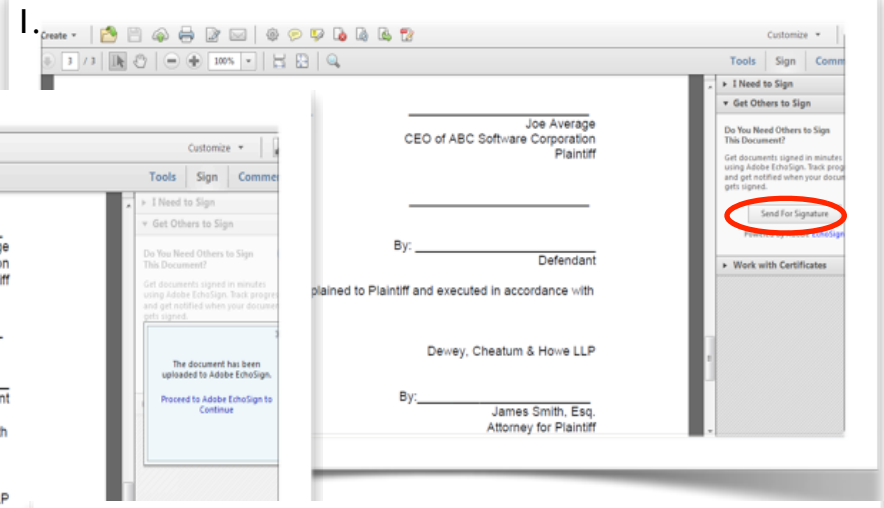
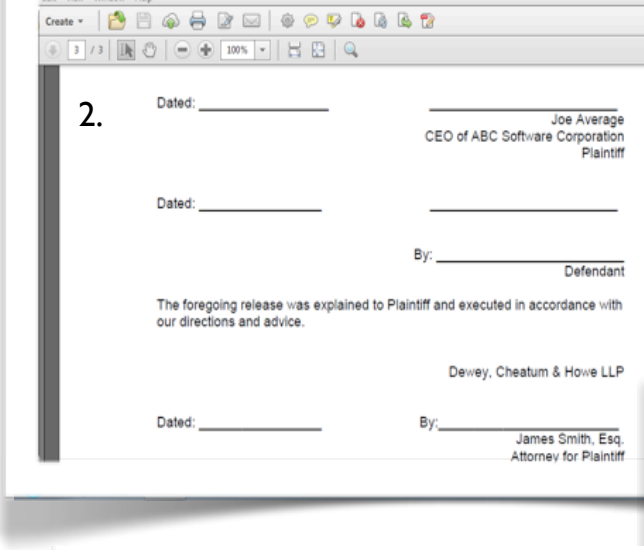
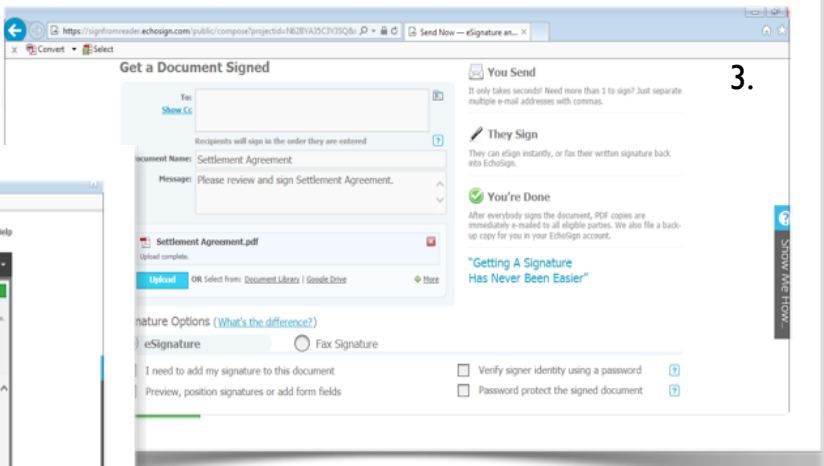
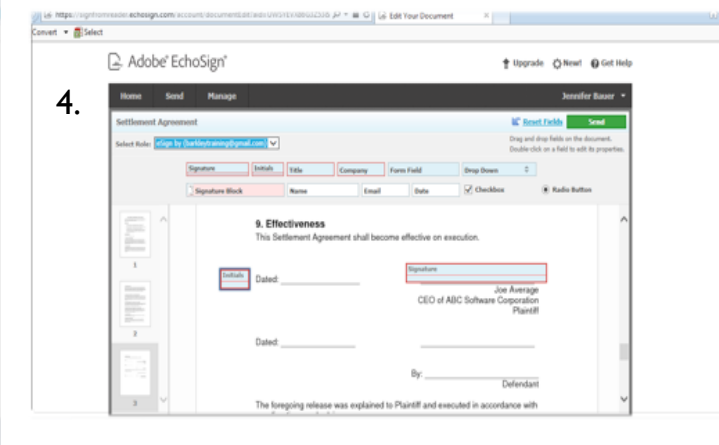
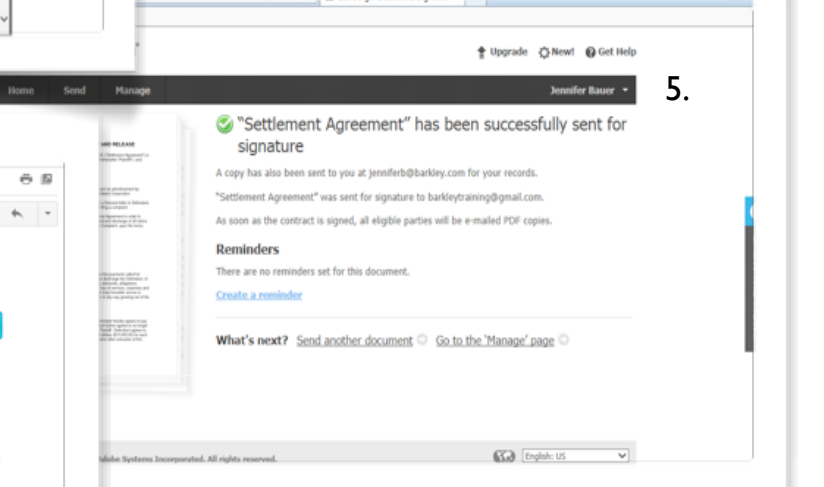
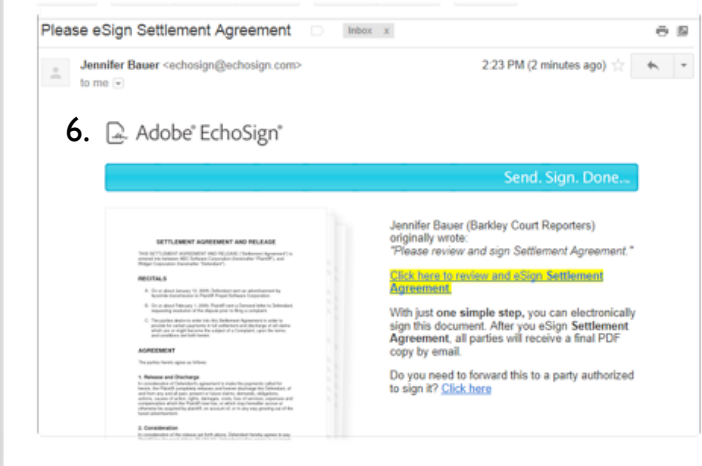
Your signer will receive an email notification that you have sent them a document to sign. They will be directed to the secure EchoSign website to review the document online and eSign the document.

You're Done

Once your document is signed, both you and your signer will receive an email with the document as a PDF attachment. In addition, the signed document is stored in your EchoSign account for future reference.

**"Getting A Signature
Has Never Been Easier"**

The screenshots below illustrate the steps for sending a document out for others to sign using an EchoSign account through Adobe XI Pro.

1. 
2. 
3. 
4. 
5. 
6. 

13. Securing PDFs with Passwords

TOOLS → PROTECTION → ENCRYPT → ENCRYPT WITH PASSWORD

Users can be required to enter a password in order to view information in a PDF. Simply click on **Tools**, select **Protection**, then **Encrypt**. Click on **Encrypt with Password**. The Password Security-Settings window displays. Follow prompts to choose level of security needed. A password can be required to open the PDF and/or to complete the form fields. Editing and printing also can be restricted as well as just parts of a PDF, such as attachments or the metadata.



Password Security - Settings

Document Open

☐ Require a password to open the document

Document Open Password: Not Rated

No password will be required to open this document.

Permissions **Check "Restrict Editing" box to enable added security measures**

☐ Restrict editing and printing of the document. A password will be required in order to change these permission settings.

Printing Allowed: High Resolution

Changes Allowed: Any except extracting pages

☒ Enable copying of text, images, and other content

☒ Enable text access for screen reader devices for the visually impaired

Change Permissions Password: Not Rated

Options

Compatibility: Acrobat 7.0 and later Encryption Level: 128-bit AES

☒ Encrypt all document contents

☐ Encrypt all document contents except metadata (Acrobat 6 and later compatible)

☐ Encrypt only file attachments (Acrobat 7 and later compatible)

Select from these options to secure parts of your PDF.

All contents of the document will be encrypted and search engines will not be able to access the document's metadata.

Help OK Cancel

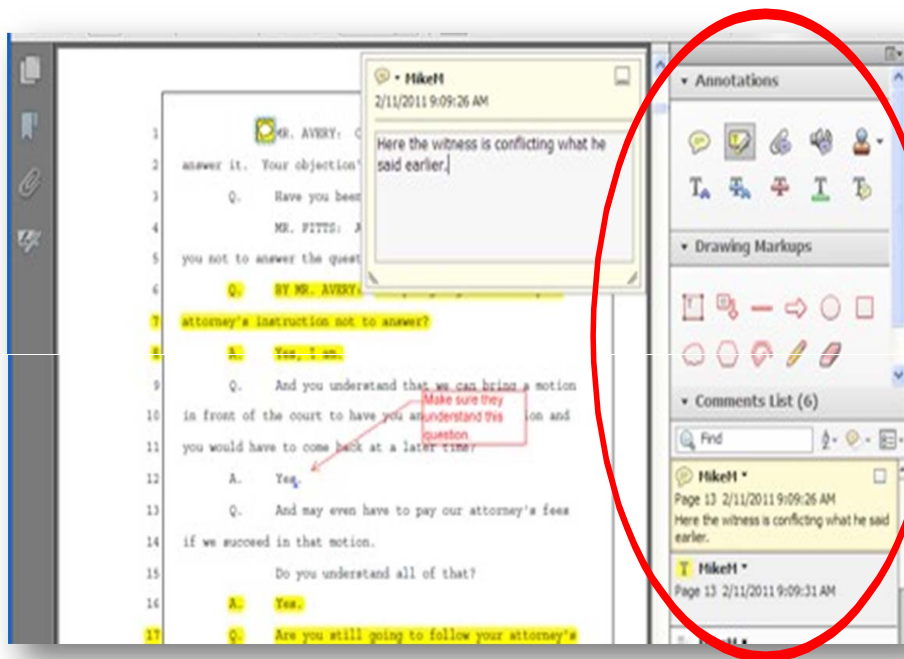
After entering password(s) and encryption settings, Acrobat prompts you to save a secure copy. This leaves original file intact and creates a separate file with your required security. Note: Adding passwords to protect a PDF does not guarantee that it cannot be compromised.

14. Collaborating Using PDFs

COMMENT→ ANNOTATIONS & DRAWING MARKUPS→ COMMENTS LIST→ REVIEW

Working with others to create and revise documents can be complicated and confusing. Acrobat has a sophisticated comment and markup system to help. Click on **Comment** in upper right, then choose either the **Annotations** or the **Drawing Markups** tool panel.

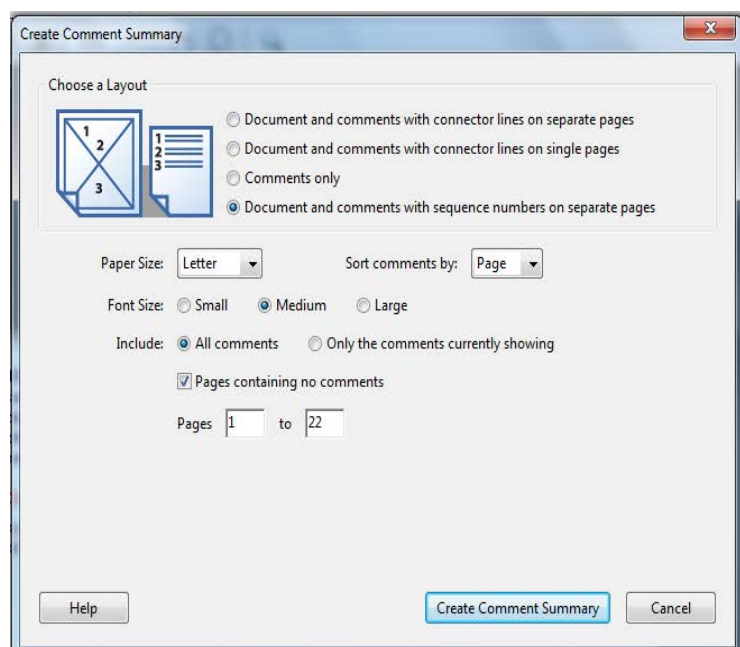
The **Annotations** pane contains text edit tools that enable you to cross out, replace, and add text. You also can highlight portions of text and add a sticky note. Use **Drawing Markups** pane to insert shapes or draw. Every change is recorded in **Comments List** pane on bottom right, with author's name. This makes it is easy to see who commented and to work with their edits.



Once PDF is fully marked, click on **Comment List** pane to review all edits. Use icons at top of pane to sort, search, filter, or print the comments. Click on a specific comment to edit or delete it. Use down arrow next to author's name to access added functions, such as adding a reply, setting status, or marking. Be sure to save the PDF using a different name once commenting is complete.

Print Comment List

Adobe Acrobat lets you print a list of the comments made. Click on the **Options** icon in upper right corner of Comment List pane. Select **Create Comment Summary**; the popup displays. Choose your layout for printing the PDF--with the comments or just Comments Only. Complete the additional fields before clicking on **Create Comment Summary** button at bottom. Adobe creates a separate PDF listing all the comments using the layout selected.

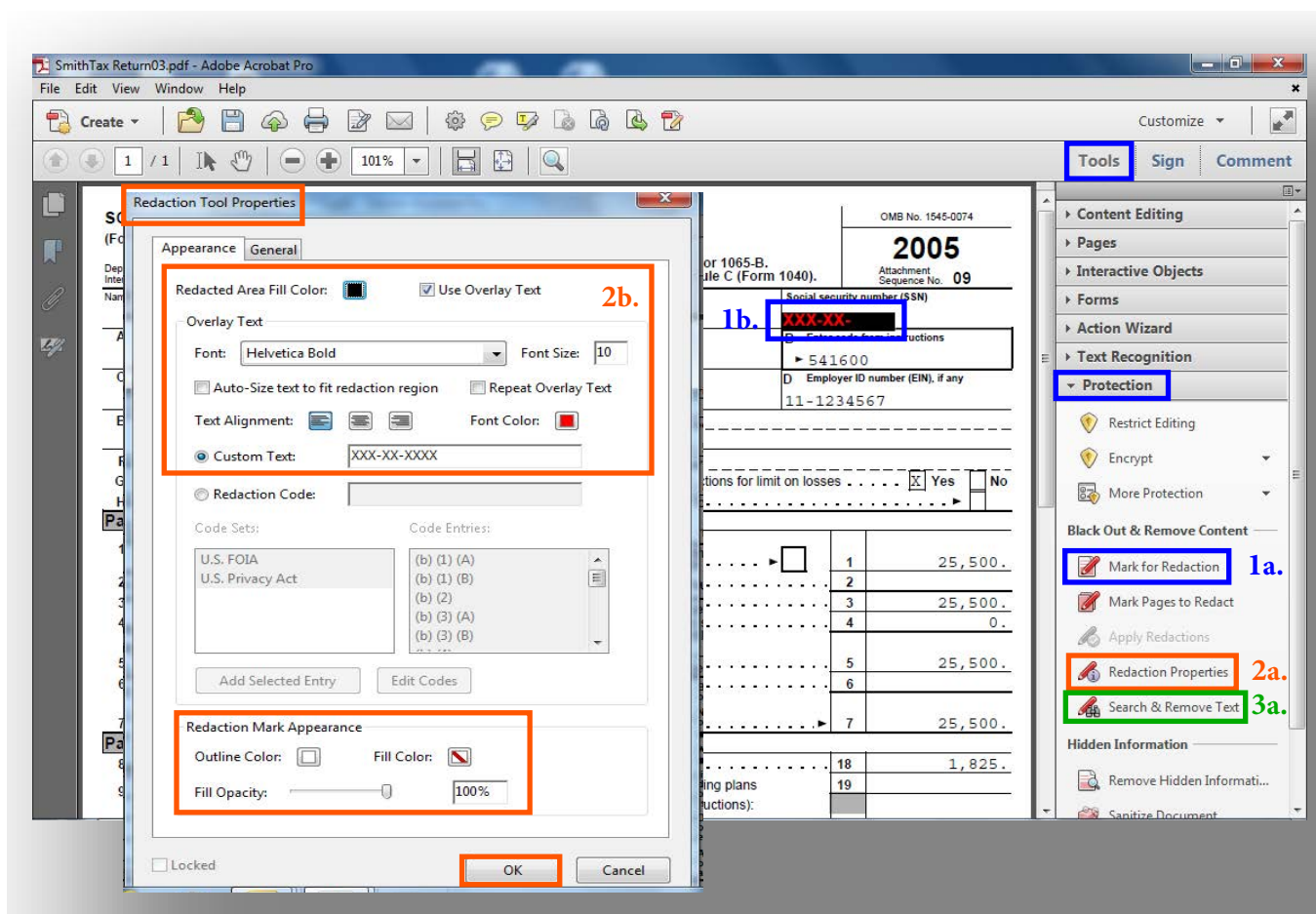


15. Redacting Information from PDFs

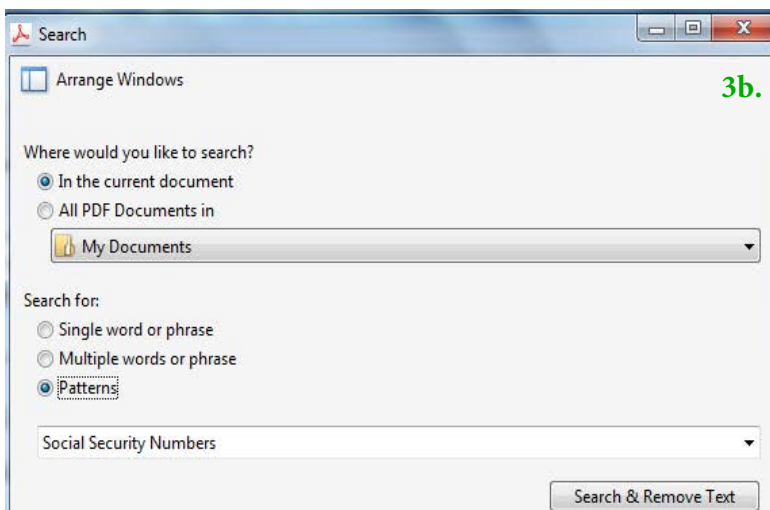
TOOLS → PROTECTION → MARK FOR REDACTION

Adobe Acrobat XI Pro allows for occurrences of a specific word, phrase, or pattern to be searched for and removed or blotted out across one or multiple PDFs.

To redact information using Adobe Acrobat Pro, you must first **Mark for Redaction** the occurrences of a specific word, phrase or pattern, and then **Apply Redactions**. This two-step process allows for the marked-up version to be saved and forwarded to colleagues for review prior to redacting. To complete the redaction process, either click through the occurrences to apply or delete each one separately, or click on **Apply Redaction** to redact all the occurrences at the same time.

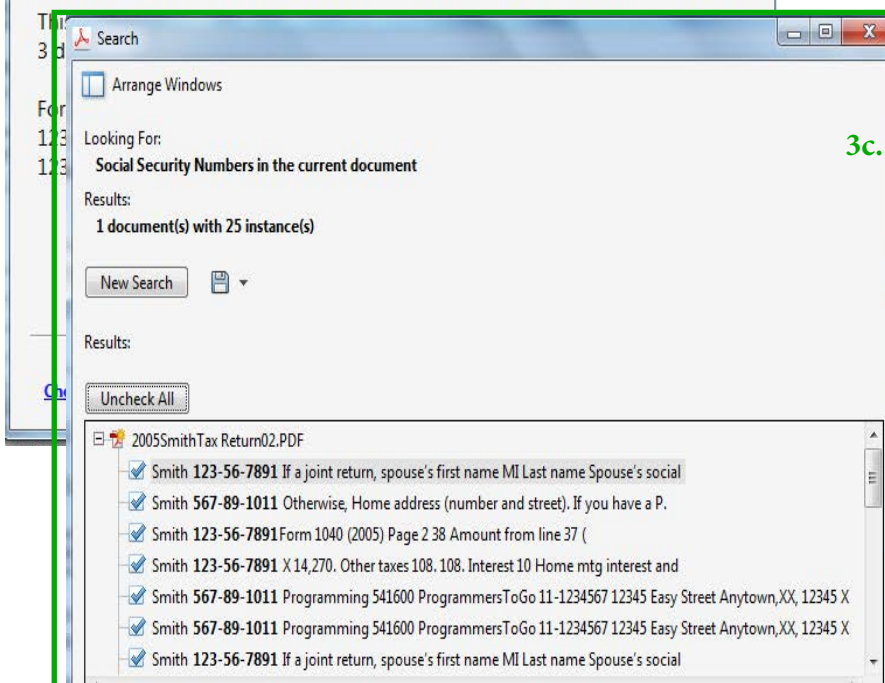


1. Click **Tools**, then **Protection**, to select **Mark for Redaction**. A special cursor appears on page. User cursor to mark the first occurrence of data to be redacted.
2. Under **Protection**, select **Redaction Properties** to set appearance. The **Redaction Tool Properties** popup displays. Click on **Redacted Area Fill Color** then select a color to blott out information and choose from **Redaction Mark Appearance** options below, or check the **Use Overlay Text** box to select font, size, color, alignment, and customization of text you want to overlay. Click **OK**. Roll cursor over marked redactions to preview.
3. Click on **Search & Remove Text** to mark all occurrences of data to be redacted in PDF(s).



3b.

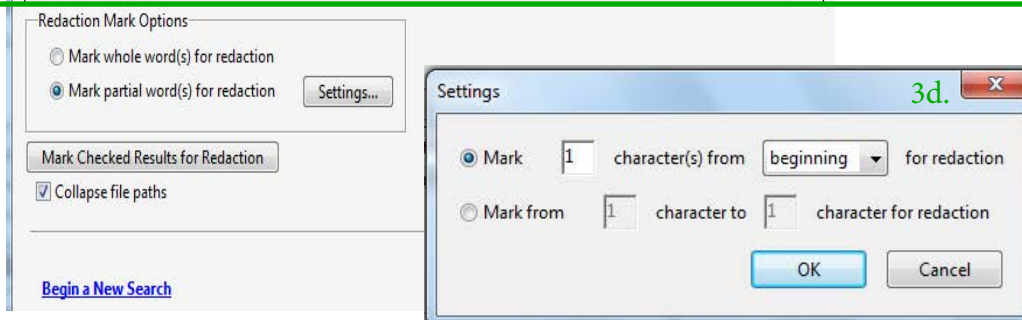
A **Search** popup displays. Complete form fields by selecting which PDFs you want to search and type of information to be redacted--a single word, multiple words, or pattern. If select **Pattern**, use down arrow to choose type of pattern. Click **Search & Remove Text** button.



3c.

Acrobat returns search results, listing PDFs searched and each occurrence. (This list can be printed as separate PDF by clicking disc icon.) Select any occurrence to view in PDF. Select occurrences to be redacted by checking box or click on **Select All** button to mark all occurrences.

3d.



Under **Redaction Mark Options**, select whether all or part of the information marked should be redacted. If **Mark Partial Words for Redaction** is selected, a **Settings** popup displays. Follow prompts to set pattern. Click **OK**. Click on **Mark Checked Results for Redaction** button to complete the Search & Remove Text process. Doublecheck work by scrolling over several occurrences to check that they are marked for redaction.

4.

Remove Hidden Information

Status:
Examining page 17 of 25...

Results:

- 2005 Tax Returns.pdf
 - Metadata (1 item)
 - Bookmarks (1 item)
 - Hidden text (16 pages)
 - Links, actions and javascript

Please wait while the document is being examined.

Form 1040 U.S. Individual Income Tax Return 2005

Department of the Treasury — Internal Revenue Service

For the year Jan 1 - Dec 31, 2005, or other tax year beginning , 2005, ending , 2005

OMB No. 1545-0047

Label
(See instructions.)
Your first name ☒ Last name ☒ **Redacted**
John X Smith
If a joint return, spouse's first name ☒ Last name ☒ **Redacted**
Mary X Smith
Home address (number and street). If you have a P.O. box, see instructions. Apartment no.
12345 Easy Street
City, town or post office. If you have a foreign address, see instructions. State ZIP code
Anytown XX 12345
Presidential Election Campaign ☒ Check here if you, or your spouse if filing jointly, want \$3 to go to this fund? (see instructions) ☐ You ☐ Spouse

Filing Status
1 ☐ Single
2 ☒ Married filing jointly (even if only one had income)
3 ☐ Married filing separately. Enter spouse's SSN above & full name here.
4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here.
5 ☐ Qualifying widow(er) with dependent child (see instructions)

Exemptions
6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a.
6b ☒ Spouse
c Dependents:
(1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) ☒ Qualifying child for child tax credit (see instructions)
If more than four dependents, see instructions. Add numbers on lines above.

Income
7 Wages, salaries, tips, etc. Attach Form(s) W-2 157,138
8a Taxable interest. Attach Schedule B if required 40,802
8b Tax-exempt interest. Do not include on line 8a 8,824
9a Ordinary dividends. Attach Schedule B if required 10,008
9b Qualified dividends 9,582
10 Taxable refunds, credits, or offsets of state and local income taxes (see instructions) 2,251
11 Alimony received 15,165
12 Business income or (loss). Attach Schedule C or C-EZ 64,832
13 Capital gain or (loss). At Sch D if rep. If not rep, check here
14 Other gains or (losses). Attach Form 4797
15a IRA distributions 15b Taxable amount (see instrs)
16a Pensions and annuities 15b Taxable amount (see instrs)
17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

4. Once all the information that needs to be redacted is marked and checked, be sure to select **Apply Redactions**.

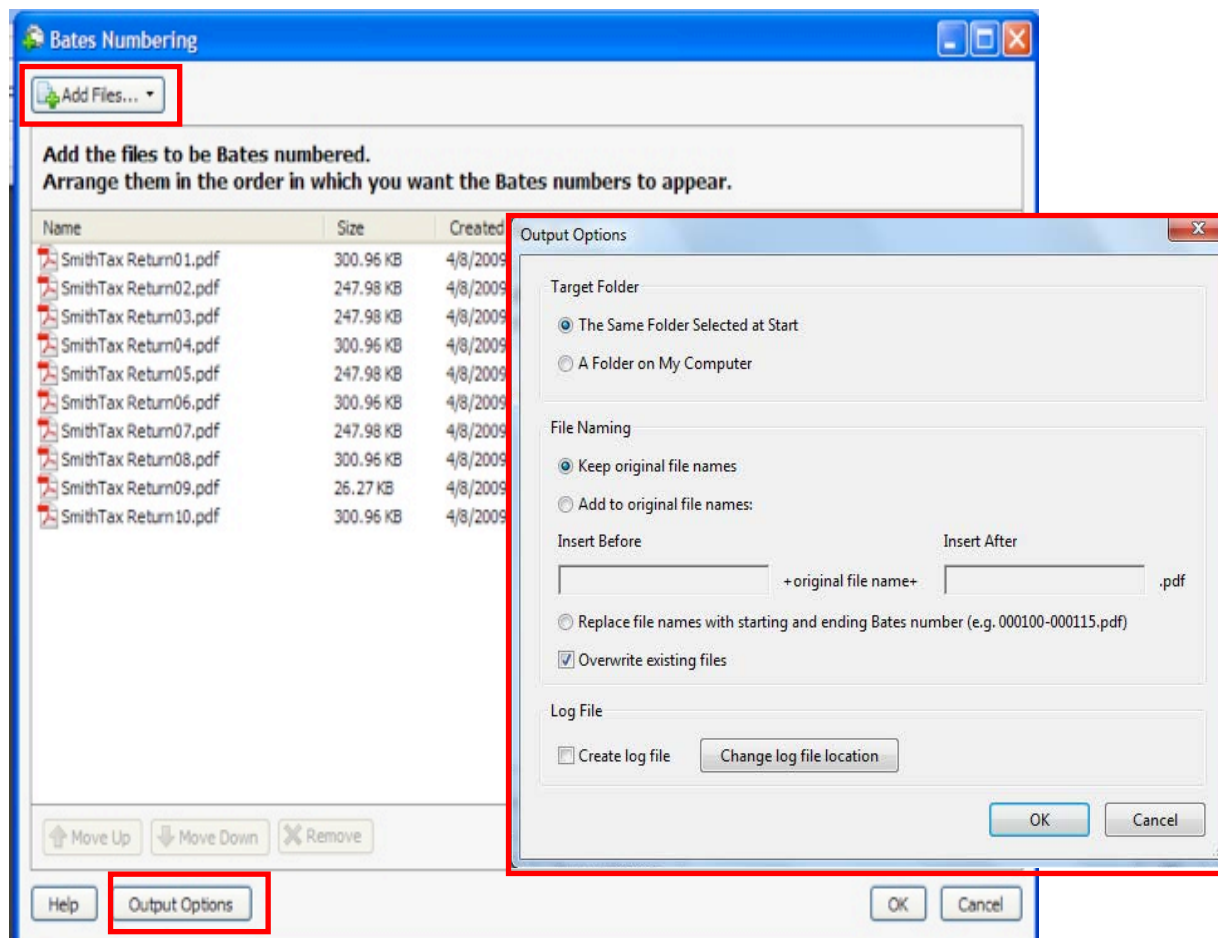
After redactions have been made, Acrobat asks if you would like to find and remove hidden information in the PDF. Click **Yes** to have Adobe search the PFD for hidden information. The results appear in the far left column. Check mark the appropriate boxes to remove the hidden information as is necessary. Be sure to save the PDF using a different name.

16. Bates Numbering Legal Documents

TOOLS → PAGES → BATES NUMBERING → ADD BATES NUMBERING

During discovery phase of litigation, a large number of documents might necessitate use of unique identifiers for each page of each document for reference and retrieval. Acrobat enables several files or folders of files to be easily stamped with Bates Numbers. Bates Numbering can be applied to the header or footer of your document and re-applied if you make an error or add more documents.

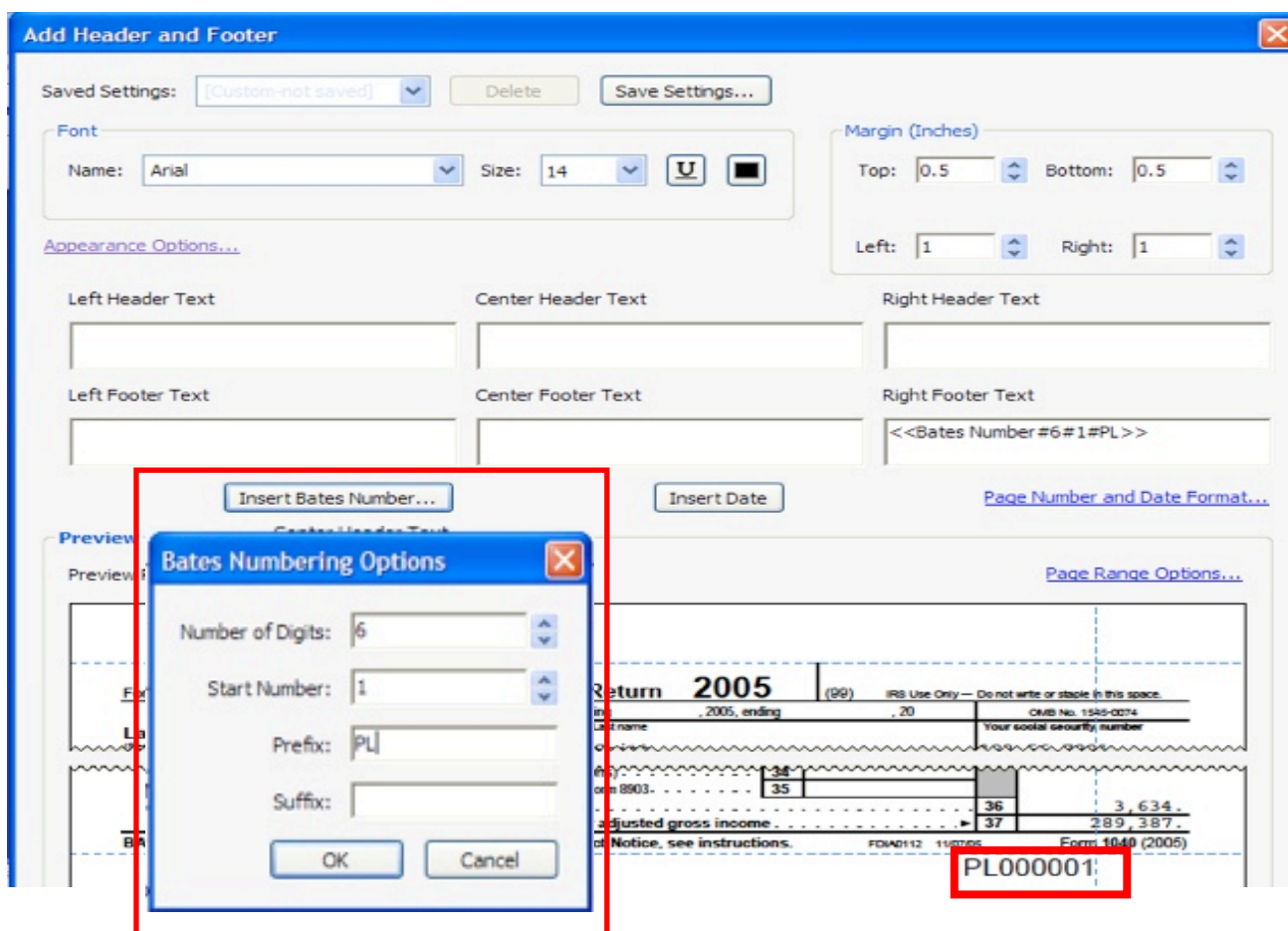
Click on **Tools** option in upper right, then select **Pages**. Scroll down to bottom of page and use down arrow for **Bates Numbering** to select **Add Bates Numbering**. A Bates Numbering popup displays. Click on **Add Files** button in upper left to access documents to be Bates stamped. Files display below. Drag and drop or use buttons at bottom to properly sequenced the documents.



Once all the documents to be Bates Numbered have been listed in their proper order, click on **Output Options** button at the bottom. Inside that popup, select where bates numbered documents are to be saved and follow prompts to set how they are to be named. Then click **OK** to close Output Options popup. Click **OK** again to close Bates Numbering display.

The Bates numbering process inside Acrobat allows you to select the number of digits, the start number, and whether or not to use a prefix or a suffix. This can be useful if some of the Bates Numbering has already been completed and you are starting at a number higher than one (1).

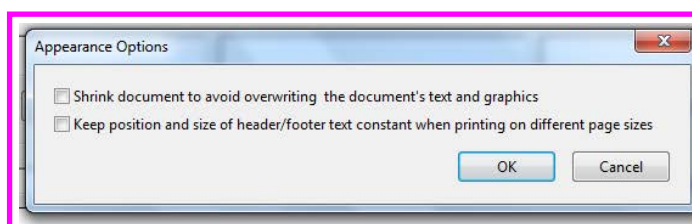
Once you click out of the Bates Number popup, Acrobat opens the Add Header and Footer display. Complete the fields to set how and where your Bates Numbers are added. A preview of how the Bates Numbering will look appears at bottom of page. Click **OK**.



The Saved Settings... button at the top allows you to save your settings for future use to better adhere to formatting standards you already set with prior Bates Numbering.

The Appearance Options link enables you to avoid stamping over text on the PDF page and to ensure that your Bates Stamps consistently appear in the same spot on every page.

The Insert Bates Number... button enables you to customized your Bates Numbers in terms of number of digits, start number, etc.



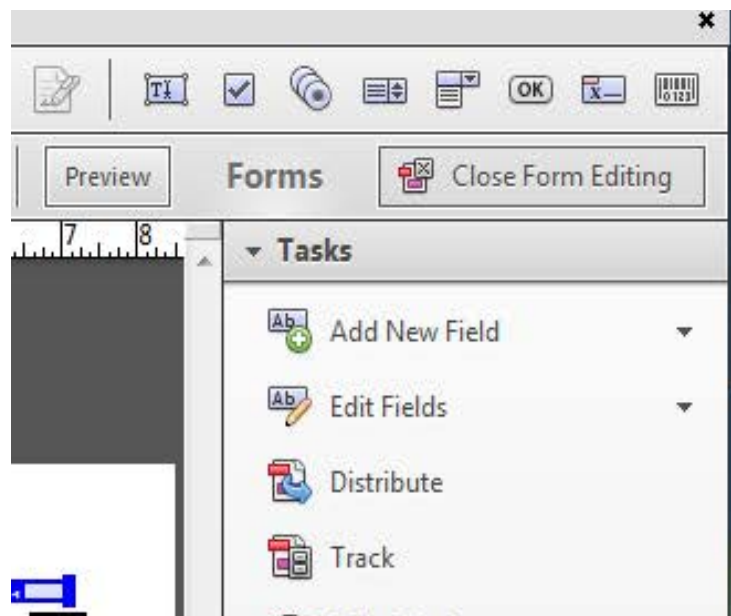
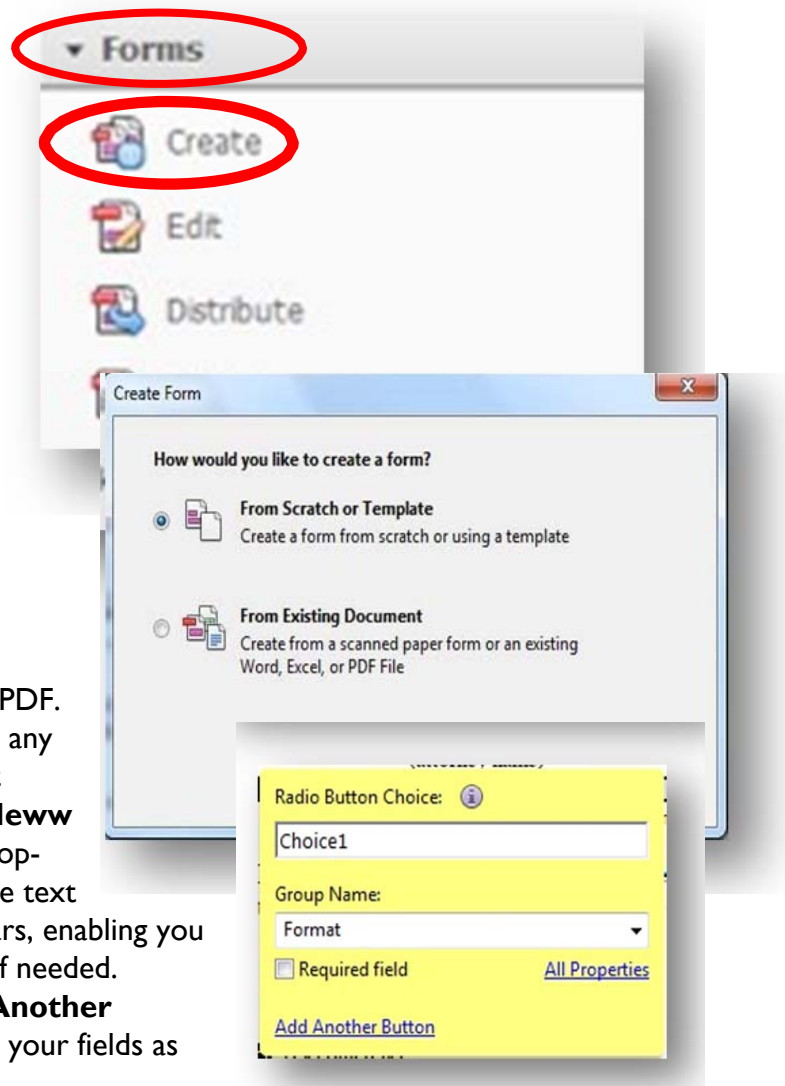
17. Creating Fillable Legal Forms

Ever received PDFs that are formatted like a form, but are not fillable? What can you do? Creating a fillable PDF is the answer.

Click on **Tools** in the upper right corner, then select **Forms**. Choose **Create**. The Create Form dialogue box opens. You can create a form from scratch or use a template from Adobe Forms Central. In this case, choose to create a form **From Existing Document**. The Form Editing function opens (which you must close in order to use the form) and a Tasks pane appears on right under the Forms panel. The Task pane enables you create and edit form fields.

When you create a form from an existing PDF, Acrobat tries to detect all fields in the PDF. Acrobat is not 100% accurate; you must add any missing fields. To add fields, use buttons that populate in ribbon above or click on **Add New Field** on right. Choose **Text Field** from drop-down options. Drag cursor on page to where text field should be added. A yellow popup appears, enabling you to name, group, and mark field as required, if needed. When adding a group of buttons, use **Add Another Button** link at bottom. Remember to name your fields as that allows for properly tracking and analyzing results.

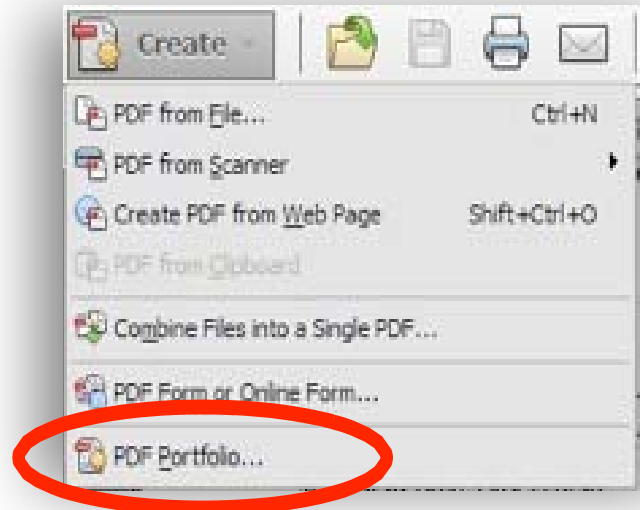
Once all buttons in the group are added, click on **Edit Fields** on right and select **Align**, **Distribute**, or **Center** to properly position fields. Then select **Set Fields to Same Size** to make them uniform. For additional options, such as changing fonts, limiting number of characters, or locking a field, right click on the field, then select **Properties** from popup. Once all necessary fields are added, click **Close Form Editing**. Ensure all fields appear as intended.



18. Creating PDF Portfolios

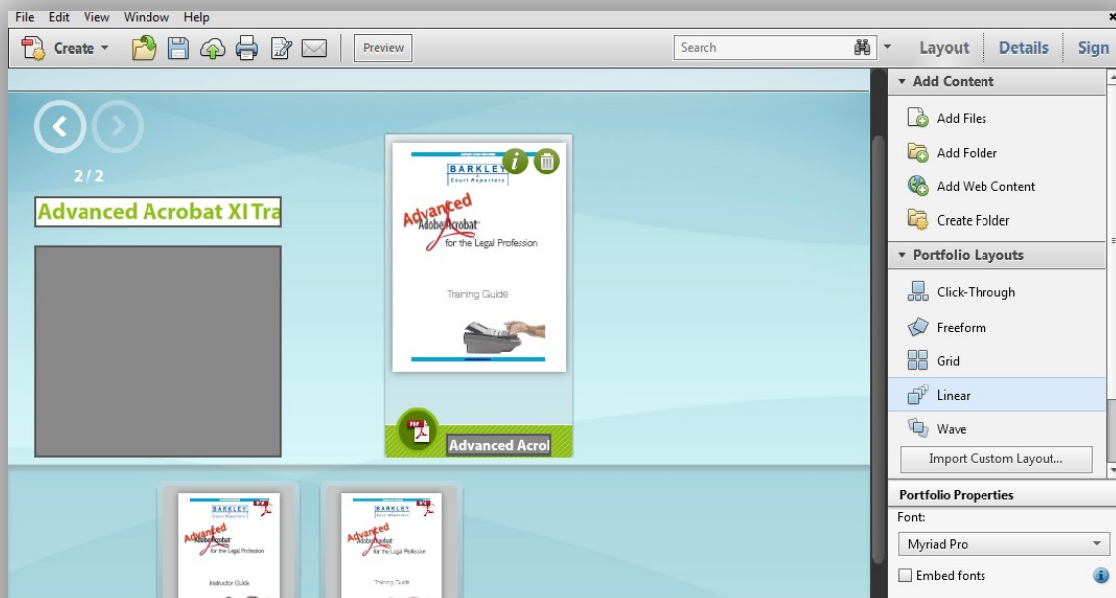
There are times you need to send several documents as a single file but have them retain their original format. A PDF Portfolio is one way to do this--and in a visually appealing way.

PDF Portfolios can include Word documents, Excel spreadsheets, Visio Charts, and other file formats--in their native format. A color scheme can be applied to the PDF Portfolio and a logo added in the header for a customized presentation. If recipients do not have Word or Excel, they still can preview the information contained in each document in the Portfolio provided they have the latest version of Adobe Acrobat Reader.



To create a PDF Portfolio, click on **Create** in the upper left corner, then choose **PDF Portfolio**. A wizard launches that walks you through the process of creating a PDF Portfolio. Use the panes on the right to customize the look of your PDF Portfolio. Click in header area to add a logo or images.

Customize how your files are displayed.



Click on files to view;
double-click to open.

Click different tool
panes to customize.

A finished PDF Portfolio is delivered as a single PDF.