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Top 10 Tips for Adobe Acrobat 9 Professional

By Roy Greenberg

INTRODUCTION

You're already familiar with Adobe's portable document format: convert your document into PDF format and anyone who downloads the free [Adobe Acrobat Reader](#) can read it. The PDF is identical in appearance to the original document.

[Adobe Acrobat 9 Professional](#), which recently received a 4.5 out of 5.0 TechnoScore in this newsletter, offers some useful new tools. Put a little extra effort into your PDF documents, and even newcomers to Acrobat Reader will reap the benefits.

Below you'll find my top ten tips for Acrobat 9 Pro, many of which will work with prior versions of Acrobat.

1. USE BOOKMARKS TO SHOW DIFFERENT DOCUMENT VIEWS

Acrobat bookmarks can do more than jump to a document page. Bookmarks can give readers different views of the same page.

Suppose a reader might benefit from a close-up view of a survey's key area. Explaining to Acrobat newcomers how to zoom in, and then return to a normal view, can be tricky. Use two bookmarks instead.

Select a magnified view with any of the magnification tools. Create a bookmark. One quick way: press Ctrl+B (i.e., the control key and the b key). Double click the bookmark to name it something like "Click Here for Magnified View." Return the document to normal size. Create another bookmark called "Click Here for Normal View." That's all there is to it. Your readers can click one bookmark to magnify the view, and the other to return to normal.

Bookmarks are of little help if your reader can't find them. Select Ctrl+D. Choose "Initial View" from the

tabbed sections. Choose "Bookmarks Panels and Page" from the navigation tab list menu. Save your document. When the reader opens the document, they can see your bookmarks.

2. ERASE TEXT WITH THE REDACTION TOOL

Acrobat is not a word processor, but that doesn't stop anyone from using it to edit PDF documents. Use the redaction tool for deleting text. Open the redaction toolbar by right-clicking any toolbar and choosing it from the resulting list. Select the "Mark for Redaction" tool. Mark the word or words that you want to delete. If you are having trouble selecting a word, increase the document magnification. Right click your redaction box to change the "Redacted Area Fill Color" to "No Color." Choose "Apply Redaction" from the toolbar.

Acrobat bookmarks can do more than jump to a document page. Bookmarks can give readers different views of the same page.

This change redacts the selected word with a white area showing no boundary, just like applying whiteout to a typed document. Don't try this for the first time without keeping a safety copy of the document, as you can't restore any language after using this redaction technique. Insert new language with either the typewriter tool or a text box. If you use a text box, change the properties to eliminate any border. Your text has now replaced the existing text.

Rick Borstein originally suggested this tip for removing stray marks from scanned documents. His [blog](#) for legal professionals is a great resource.

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3. PRINT YOUR COMMENTS

Clients can read your document comments on screen. Give them a printable copy of your comments as well.

Press Ctrl+P. In the document print dialogue, choose the “Summarize Comments” menu option. Select the “Large” option for the font size in case your readers are ... shall we say ... older. Choose “Documents and Comments With Sequence Number on Separate Pages.” Press “Print Comment Summary.” In the next dialogue, don’t print the document to paper. Make it a new PDF by printing it to your Adobe Acrobat driver.

Your screen will now contain each page of your document, with your comments numbered, followed by a page containing comments with corresponding numbers. Save this document with an easily understood name: “Contract With Comments Already Printed Out.” You may want your reader to see this comparison document in a side-by-side page view, to show what you’ve done. To set the document initial view: press Ctrl+D. Choose the “Initial View” tab. In the page layout drop down menu, choose “Two Up Facing.”

When you email the original document with your comments to your client, send this one as well.

In Acrobat 9, you can “Enable Commenting” for recipients who don’t have Acrobat but only the free Adobe Reader.

4. USE DIGITAL RATHER THAN SCANNED SIGNATURES

I understand why lawyers sign online letters with a scan of their handwritten signature. But have you considered the drawbacks of releasing a perfect reproduction of your signature into the online world? If you spend a few moments with a program capable of cutting and pasting graphics, you can move your signature from its original document to wherever you choose. Maybe giving everyone the same ability to move your signature is not such a good idea. Granted, you can ultimately

prove that you didn’t sign a document — if and when it finally comes to your attention — but why take the risk?

Signing a document is only one of many ways to prove its authorship. You can choose a better alternative. Acrobat offers a simple way to securely sign, or authenticate, your documents. When you “sign” a PDF letter in Acrobat, the program creates an electronic signature containing a checkmark, the date and time of signing, and other information. If the document is changed, the checkmark changes to reflect the letter’s altered status. When the recipient of your letter clicks the electronic signature, Acrobat offers various options for enabling you to read the document without any changes.

To sign a document, choose “Sign Document” from the “Sign” menu. Acrobat will walk you through the process with pop-up help screens.

5. ENABLE COMMENTING

In Acrobat 9, you can “Enable Commenting” for recipients who don’t have Acrobat but only the free Adobe Reader (version 8 or 9). Doing so enables them to use all of the Adobe commenting tools. Under the “Advanced” menu, choose “Extend Features in Adobe Reader.” Even if your readers have no interest in most of the commenting tools, this feature enables them to easily respond to your comments.

Take a typical document peppered with your sticky comments in the form of yellow icons. Once you enable commenting, your recipients will see a new option of menus when they right click any of your comments. For instance, they can type a response to any comment. Just tell your recipients to right click any comment and type a response. The response is saved with the original comment. When they return the document to you, you’ll have their written responses to each comment.

6. INCLUDE THE ORIGINAL DOCUMENT WITH THE PDF FILE

Have you ever emailed a PDF document and the original editable text file only to have one get separated from the other? Acrobat offers an elegant and comprehensive solution in the form of PDF portfolios. Acrobat portfolios merit their own article. My experience suggests that many portfolio recipients either cannot open

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them or are puzzled by their contents. Here's a simpler solution.

Acrobat enables you to attach a file as a comment to a PDF. Once attached, the file remains part of the PDF. In the comment menu, choose "Attach File as Comment" under "Comment and Mark Up Tools" in the "Comment" menu. Select a file in the window. Choose how this comment will appear in the PDF. I usually pick the paperclip icon because that symbol is not otherwise used in Acrobat. Anyone clicking on the paperclip will now open the attached file. As always, Windows will match the file to a program based upon the file associations established on your machine. Take one more step for the benefit of your readers. Use the "Call Out" tool to tell readers that the file has been attached.

Choose the call out tool from the "Comment and Mark-up" toolbar or menu. Draw an arrow to the paperclip. In the box that will appear at the end of the arrow, write "Click paperclip for editable copy of this document." With that instruction, most readers should be able to retrieve the file.

7. REDUCE DOCUMENT SIZE

The Acrobat "Document" menu gives you the option to "Reduce Document Size." Consider this option whenever sending a large document. Your compression options depend upon your recipient's version of Adobe Reader. To be safe, I always select the option that enables my document to be read by Adobe Reader 6 or any newer version.

8. DOCUMENT COMPARISON NOW WORTH USING

Lawyers compare document versions every day. Vendors sell specialized comparison programs. Acrobat has always contained a function to compare PDF documents, but few attorneys found it of much use. Adobe has finally succumbed to the howls of frustrated lawyers and completely revised Acrobat's document comparison feature. Acrobat finally compares PDFs in a useful way. For many Acrobat users, this feature alone justifies purchase of the latest version.

When Acrobat 9 compares documents, you get a useful report as well as a document highlighting all changes. Most significantly, the highlighted document includes comments showing exactly what's been added and deleted. You can even put two document versions side-by-side, and as you scroll through one, both will move in sync. This feature is not yet as good as market-leading comparison programs, but many lawyers will find it adequate.

[Rick Borstein created an excellent video demonstration of this feature.](#)

9. INCREASE YOUR VIEWING AREA WITH TWO KEYSTROKES

Acrobat contains "speed keys" that enable you to choose functions without navigating through the menus. Two of my favorites: F8 key will remove (and then restore) the tool bars at the top of the screen, and F9 does the same for the menu bar. Used in tandem, they may give you a couple of inches of screen space.

Adobe has finally succumbed to the howls of frustrated lawyers and completely revised Acrobat's document comparison feature.

10. SPLIT FILES FOR SMALLER EMAIL ATTACHMENTS

Ever had trouble sending a PDF email attachment that was too large? Acrobat 9 has a new solution. Divide your document into smaller parts and send it as multiple emails. Under the "Document" menu choose "Split Document." The menu choices are self-explanatory. Now send your divided file as attachments to several different emails.

This feature is less useful than I would like, because it's most useful for splitting extremely lengthy documents. Many users already split long documents into component parts and mail them as part of a portfolio. But

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since this feature doesn't split Adobe portfolios (which would then need to be reassembled by the recipient) this tool is of limited use. I recently struggled to email a portfolio consisting of all the email (over 300 messages, with attachments) from a transaction. I finally burnt the file to a CD and mailed it.

However, if you file documents electronically with a court that limits file size, this feature will come in handy.

MEET THE FUTURE

C William Gibson said, "The future is already here — it's just unevenly distributed."

You can see the future, and even take part in it, at www.acrobat.com. The services at this Adobe Web site are currently free. The site focuses on sharing documents among multiple users, termed "document collaboration." I remember not too long ago fighting to convince attorneys to use email. Document collaboration will have a similar impact upon law offices.

If you've ever tried explaining a survey or a document to a client by phone, you'll appreciate the importance of showing, rather than telling, your client where to look. Online document collaboration enables your client to see whatever is on your screen. You can then use your own tools (within Acrobat or any other program) to treat your screen as a whiteboard. Run your own classroom. Point to your drawing with arrows, circle key points, highlight words, or whatever you wish. Better yet, you can give your client control over your program. Let your client show you exactly how he'd like the sentence to read, fix the error in your spreadsheet, or highlight the boundary line in question. You get the idea. At that point, aided by a conference telephone call, you and your client are in the same virtual space, if not the same room.

Acrobat.com is a limited free version of Acrobat Connect, which has yet to find its audience. I recently participated in a demonstration of Acrobat Connect in which the online participants were in California, New York, Texas, Canada, and Iran. At one point the Adobe leader enabled me to take over her screen and enter numbers into her spreadsheet. Easy enough. Free online collaboration is limited to three users, but the key Connect features are available.

Document collaboration software will soon be on every computer. Adobe has one advantage that may prove decisive: if you use Acrobat.com, your users probably won't need to download any software. Adobe relies on Adobe Flash, which Adobe claims already resides on 97% of computers. So, you can put your screen on your client's computer with minimal effort.

CONCLUSION

Adobe Acrobat 9 is powerful and versatile program but challenging to master. Concentrate on those features of immediate use. If you want to learn its more obscure capabilities, read one of the many third-party books. I recommend manuals written by [Donna Baker](#), although many other good choices exist.

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ABOUT THE AUTHOR

Roy Greenberg practices in East Hampton, New York, concentrating on buying, selling, and leasing real property. The majority of his transactional documents and routine correspondence are now sent only by email. He hopes to keep practicing long enough to one day buy a new PC, transfer all his programs and documents to it, and have it all run correctly in less than a marathon weekend.

Contact Roy:
E: royglaw@optonline.net

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