

Quick Tips

Adobe Acrobat Quick Tips

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Adobe Acrobat is one of the most useful and yet most underutilized tools in a paralegals arsenal. Acrobat creates and works with Portable Document Exchange, or PDF, documents and is the gold standard for electronic document exchange. There are many benefits to using PDF documents, but the main benefits for paralegals are that the files are reliable and uniform, searchable, accessible and work across multiple platforms.

- **Reliable and Uniform:** Have you ever received a word document from someone and when you open it up, the margins are off or the text looks funny? You may even wonder why they would send something out when it is so carelessly formatted. The document may re-format slightly when opened with a different version of word, or when opened on a different system such as a tablet or smart phone. When you create a PDF file, all of your documents, fonts, formatting, images and other information are combined into a neat file which looks the same no matter who opens it. This ensures that the recipient sees what you intend for them to see.
- **Searchable:** PDF documents are search friendly. Many PDFs are word searchable without taking any additional steps and those which aren't can often be OCR'd. Also, text can typically be exported to Microsoft Word for editing.
- **Accessible:** PDF documents can help meet accessibility standards often required by courts by creating files that make it easier for people with disabilities, such as blindness, low vision, or mobility impairments.
- **Multiplatform:** PDF documents can be viewed on almost any type of system, including Windows Mac and mobile - including android and iOS for iPhone and iPad. Even if the user does not have a full version of Adobe Acrobat they can download and use the free version of Adobe Reader to view, sign documents, fill out forms and make comments.

It's important to be aware that Adobe Acrobat and Adobe Reader are not the same:

- Adobe Acrobat is the complete program which allows you to create PDF documents, merge files, create forms and collect responses and create shared reviews. You can even embed audio or video files to enhance your PDF document.
- Adobe Reader is a free viewer which can be used primarily for viewing and printing PDF documents but not creating or editing them. Reader allows you to fill in and save forms, digitally sign documents and make some minor mark ups to a document. Anyone on almost any system including most mobile devices can download Adobe Reader for free. This is perfect for attorneys, clients, witnesses or other interested parties who may need to view or print PDF documents you have prepared.

Now that you have some of the benefits of Acrobat in mind, here are some tips on putting it to use:

1. **Creating a Single PDF vs. PDF Portfolio:** Acrobat gives you the option to create single document PDFs or PDF Portfolios depending on your needs. A single document PDF can be compared to using a binder clip to contain a stack of loose pages in order without any division. A PDF Portfolio can be compared to numerous documents clipped separately and placed together inside a redwell. (*Pro tip: need to print a large volume of files with the same print settings? Combine them into a PDF Portfolio and you can easily print them all at once as separate documents*)
2. **Searching:** In addition to searching within an individual PDF or PDF Portfolio, you can also search all PDF documents in a particular directory. (*Shift-Ctrl-F or Edit>Search*) (*Pro Tip: Looking for a key word in a folder full of records? Convert the files to PDF and then search the directory to easily find the correct file without opening each.*)
3. **File Location:** Need to know the file path of your open PDF? A clickable file path is displayed in the file properties under advanced. (*Ctrl-D or File>Properties*)
4. **Headers or Footers:** Want to add, remove or update a header or footer in your document? Simply go to Document>Header and Footer and customize your text. You can save the settings so you don't need to re-format every time. (*Pro tip: need to bate stamp a document but don't have Acrobat Professional? Use custom page numbering in your footer to achieve the same result.*)
5. **Watermarks:** Want to add, remove or update a watermark in your document? Simply go to Document>Watermark and customize text or image you want to use. Be sure to save your settings so you don't need to re-format every time.
6. **Native Files:** Acrobat allows you to attach native files to your PDF documents. Simply go to Document>Attach a File and select your file. (*Pro tip: attach a copy of an Excel spreadsheet as backup inside a PDF invoice*)
7. **Security:** Does your document require a little privacy? Acrobat allows you to add passwords or other security measures before distributing your document. Simply go to Advanced>Security and choose the option that works best for you. (*Pro tip: Password protect confidential client documents before e-mailing them to your attorney for review.*)
8. **Commenting and Markup:** Use editing tools to add highlighting, text, arrows or stamps to your documents. Go to

Tools>Comment and Markup and select the option that works for you. *(Pro tip: Instead of highlighting a printed document by hand, use the highlight text tool to produce professional and uniform looking highlighting in a variety of colors. You can then print a clean or highlighted copy by selecting your choice on the print page under Comments and Forms.)*

9. Sticky Notes: Use sticky notes to add comments to your document. Simply right click at the point of insertion and choose "Add Sticky Note". Perfect for collaborating with others on a document, you can even set a status for each sticky note such as accepted or rejected. *(Pro tip: You can create a convenient summary of comments including sticky notes or highlighted text. This handy option will recreate your document, adding a numbered summary of comments.) (Ctrl-T)*
10. Accessibility: Acrobat includes tools which allow you to meet accessibility standards and makes it easier for people with disabilities to access the information contained within. Acrobat allows you to tag content such as headers, paragraphs or images, and to add alternative descriptions of images or charts.

Adobe Acrobat is a goldmine of time savers and problem solvers for paralegals, embracing it can only make you more efficient as you learn to navigate the ins and outs of this most useful program.

Linda McGrath-Cruz is a Florida Registered and Advanced Certified Paralegal with the Miami office of Arnstein & Lehr LLP. She has been a paralegal since 1997, working primarily in medical device and products liability defense. Linda is also the organizer and host of *The Paralegal Cruise: Paralegals Navigating Perilous Waters™*, an annual networking and education vacation event for paralegals and other legal professionals and their friends and family. For more information about the Paralegal Cruise, you can visit www.paralegalcruise.com.

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