PDF SKILLS: I DIDN'T KNOW I COULD DO THAT![1]

By Daniel J. Siegel, esquire
Law Offices of Daniel J. Siegel, LLC & Integrated Technology Services, LLC
Email **Dan@TechLawyergy.com**
(610) 446-3467 | www.TechLawyergy.com

Introduction – or Scream!

Every time people watch one of the presentations Pam Myers and I do about PDFs, and specifically, Adobe Acrobat DC Professional, they stare and say that they had no idea that Acrobat could do those things. And every time we tell them that Acrobat is so much more than a PDF maker.

In fact, Acrobat is an essential part of our law office. (Pam is my co-author of *The Ultimate Guide to Adobe Acrobat DC Professional – Second Edition)*, available from the ABA. So essential that when we hear from colleagues, we sometimes flinch, or scream. Allow me to explain. A lawyer recently contacted me and asked how to export a PDF to Microsoft Word format. I explained how to do it, assuming he had purchased Adobe Acrobat DC and wasn't using the free Reader that has none of the features a lawyer needs. Boy was I wrong. He wrote back that "I have Acrobat Reader DC. I subscribed to the pay version, but I couldn't make it work. I almost never need OCR. So now that I have converted the file, I am good to go." He also explained it took an hour to find an online (and probably insecure) free PDF conversion tool. I screamed.

I screamed. and then I screamed some more. Why? Because Adobe Acrobat DC Professional is a necessary product for virtually every lawyer, certainly a personal injury attorney such as this gentleman.

But this lawyer chose not to use Adobe Acrobat DC Professional, which costs as little as $15 per month, and to instead devote one hour to searching for a free and almost certainly non-confidential website to OCR one PDF, a process that takes seconds with Adobe Acrobat DC Professional. In fact, we use Acrobat because it is a great product and essential to our law practice. We OCR all the time, literally all the time, because it makes us far better lawyers.

I want to scream. That's why I am writing this. Not to scream, but to help show you why Acrobat is worth the minimal cost compared with all the time it saves.

So now that I have ranted, and hopefully grabbed your interest, let's look at some of the things that Acrobat does – and I bet you didn't know.

After all, this attorney attended our productivity program about how being more technology competent saves time and money. If his billable hourly rate is $250 (it's likely far more), he could have purchased our book, bought the software and attended a few programs for the value of the time he wasted searching for a way to OCR online.

---

[1] Reprinted from/adapted from materials originally presented ABA TECHSHOW 2022.

Why I Love Actions & Custom Commands

People who hear me talk about Acrobat Professional never hear me shut up about Actions, a feature available only in Acrobat DC Professional, and one of my favorites. It is easy, and it automates repetitive tasks, and it saves time.

Actions allow users to automate repetitive tasks. Think about the workflows in your cases. Acrobat actions do the same type of thing with your PDFs, allowing you to consistently handle your files without having to think about how you did something, or having to do multiple steps separately. Actions do it all in one easy step.

Acrobat Pro comes with only a few limited number of actions, such as preparing documents for distribution or creating accessible PDFs, but most are not particularly focused on legal users. There are so many you could create, and should.

Actions

All actions (whether created by Acrobat or by you) are available by going to Tools and selecting the Action Wizard. The Actions List on the right of the window displays all available actions.

When you select an action, Acrobat displays the steps in the action on the right on the window, as well as the files to be processed. You can select other files from this window. When you are ready to process the action, click Start. The Start button changes to a Stop button, which you can click on to stop the action at any time. If the process requires additional input, Acrobat will prompt you. When the action is done, the Start button will say "completed." Below the dialog is a "Full Report" link, which you can select to display a list of all tasks performed.

Creating an Action

You can create your own actions. Before doing so, write down all of the steps involved and determine what the best order should be for performing each task.

To open the Action Wizard, select Tools>Action Wizard to display the toolbar. In the Action Wizard toolbar, click New Action to display the Create New Action dialog box. The left pane of the dialog displays tools that you can include in the action (arranged by category). The right pane provides options for determining which files to process. You should always verify that an option is selected from the Add Files dropdown menu displayed below the Default Option menu. You can apply an action to an open file, prompt the user to select a file or folder, require the user to scan a document, or open a file stored in the cloud. Below that section is a list of the steps you have included with your action. You can use the buttons on the far right to design the action's appearance, including dividers, panels, and instructions.

To add steps to an action, expand the category in the left pane. One weird thing is that items in the categories do not correspond with the options in the Tools menus. Select the desired task, and click on the Plus sign with the arrow in the middle of the dialog to add the step to the action. Many tasks include a Prompt User check box as well as a Specify Settings option to allow you to customize the process further. Continue adding tasks as needed. You can use the arrows on the right to rearrange the tasks (Move Up, Move Down, or Delete). Depending upon the selected task, Acrobat may prompt you for additional information.

If you want to add a step that is not included on the dialog box, you may add instructions by clicking on the Add Instruction button on the right side of the dialog box. Generally, you should select the Pause

check box for prompts such as these. It is also important to remember that you cannot access any tools while an action is running. Thus, if you need to access another tool, include a Go To step to permit the user to perform the desired task.

After you have added all of the steps to your action, including verifying that they are in the correct order and include all desired options, save the action by clicking the Save button. You will be prompted to name your action and to include a description of it. You should test every action after you create it. To do so, just go to Tools, Action Wizard, select the action, and press Start.

Managing Actions

You can edit (revise), rename, copy, or remove (delete) an action by selecting Manage Actions on the Action Wizard toolbar. You can also rearrange the order in which the actions appear on the list.

Obtaining Additional Actions

The Acrobat Actions Exchange (https://acrobatusers.com/actions-exchange) is a great website for obtaining actions created by other Acrobat users. You can access the site from Acrobat by selecting More Actions (Web) on the Action Wizard toolbar. After downloading the desired action to your computer, select Manage Actions and then Import. Navigate to the location where you saved the downloaded file and click Open.

Warning: Be careful when downloading any files to your computer. Always run antivirus software, and only download files from reputable websites. Downloading files from unsafe websites can be very dangerous and could result in damage to your computer and your network.

Custom Commands

This feature allows users to preconfigure tasks in Acrobat Professional DC, saving time and eliminating repetitive steps. Thus, instead of creating custom watermarks, footers, and other items, users can create a Custom Command and add it to their toolbar or include it in an action.

To create a Custom Command, select New Custom Command from the Action Wizard. Next, select the task from the options on the left of the dialog. You can also specify whether to display the command's options (e.g., the Add Watermarks dialog) or hide them because the options are always the same. Make sure to give the Custom Command a descriptive name so that you can use it in other parts of Acrobat. When you save the Custom Command, it will appear on the right-hand pane in the CUSTOM COMMANDS section (below the ACTIONS LIST section).

You Can Finally Have an Acrobat Extension in Chrome and Edge

Thank God. I hated using all the work arounds when trying to save files in a browser. Finally, on January 7, 2022, Acrobat released new extensions so users can finally use Acrobat in a browser. The Adobe Acrobat for Microsoft Edge and Google Chrome makes everything PDF easier and faster by allowing you to use Acrobat directly from within Edge and Chrome. Just go to https://helpx.adobe.com/acrobat/kb/acrobat-reader-chrome-extension.html to learn more.

Utah's Exhibit Stamp Is Incredible

I have always hated the rudimentary, and sometimes awkward (to be kind) ways lawyers and court reporters labeled exhibits, a problem made worse by the pandemic and the dramatic increase in online depositions and other transcribed hearings. Utah Federal Court to the rescue.

Just go to https://www.utd.uscourts.gov/pdf-exhibit-stamps and celebrate. The stamps are simple and easy to use. Really easy. I am including the webpage here so you can see how wonderful they are:

PDF Exhibit Stamps – Reprinted from https://www.utd.uscourts.gov/pdf-exhibit-stamps

This feature allows the application of numbered or lettered exhibit stamps directly to existing PDF documents in Adobe Acrobat, without having to print and rescan the document. (Not sure if this works in Acrobat Reader, you may need the Standard or Pro version of Acrobat).

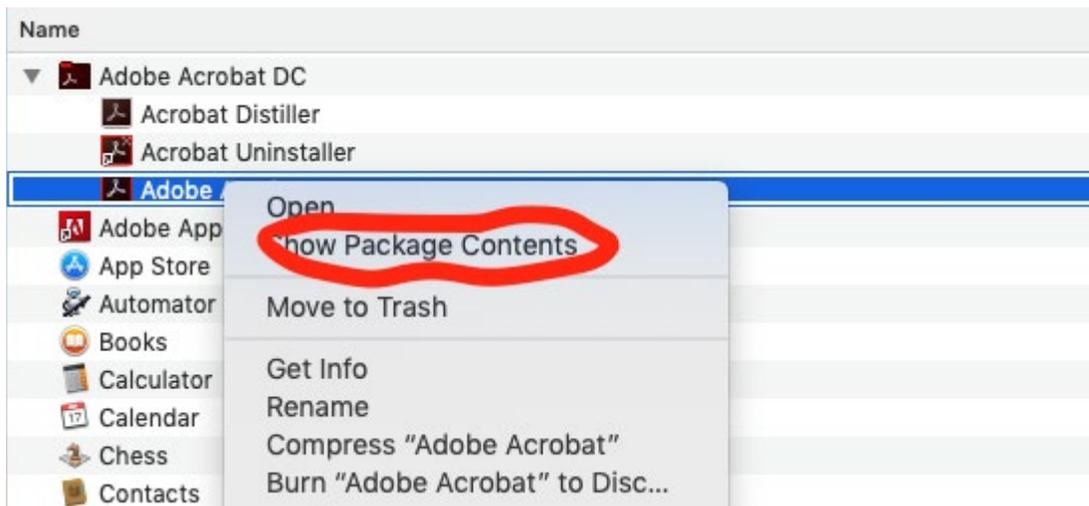
To install the exhibit stamps:

1. Download this PDF file,

2. Depending whether Windows or Mac and version of Acrobat, follow the appropriate instructions below:

 - In **Windows**, save it in C:\Users\USERNAME\AppData\Roaming\Adobe\Acrobat\11.0\Stamps, or for WinXP in C:\Documents and Settings\USERNAME\Application Data\Adobe\Acrobat\11.0\Stamps (choose the folder for your current version of Acrobat),

-   With **Adobe Acrobat Pro DC (on Windows 7**), we put the Exhibit-Stamp.pdf file into the C:\users\[USERNAME]\AppData\Roaming\Adobe\Acrobat\2015\Stamps folder, and it worked just fine.

-   Depending on your configuration or version of Acrobat, you may need to look for the Stamps folder. One way to find the correct Stamps folder on your computer may be to create a new 'test' stamp of your own, using any graphic available, and then look for a Stamps folder with a file with today's date (i.e. the current date that you created the 'test' stamp).

- In **Windows 10, and Acrobat DC**, we could not easily find the Stamps folder. So, we navigated in Windows Explorer to C:\Users\USERNAME\AppData\Roaming\Adobe\Acrobat\DC, and then in the Search bar, we searched for Stamps. The folder Stamps came up, and we opened that folder, and then pasted the ExhibitStamps.pdf file into that directory. Restarted Acrobat, and it worked.

- On a **Mac w/ Acrobat Pro 9**, the directory location is slightly different. Open Finder, Hold the Option key, and click Go, Library. This will open a window with a directory structure. Click on Application Support, Adobe, Acrobat. For Acrobat Pro 9, the directory at this point is

9.0_x86, click on that directory, and then the Stamps directory. Copy the Exhibit-Stamp.pdf file to this Stamps directory. If you have a different version of Acrobat, it will probably be a different directory, but should follow one of the above patterns.

- On a **MacBook w/ MacOS Mojave and Acrobat DC**, this worked:
Right click on the Adobe Acrobat application (ctrl + click) to bring up the menu. Here's a screenshot.

   Once you look in package contents you can navigate to the directory: /Applications/Adobe Acrobat
DC/Adobe Acrobat.app/Contents/Plugins/Comments.acroplugin/Contents/Resources/Stamps
   Copy the "exhibit-stamps" pdf file to the main "Stamps" directory and possibly to one of the language subfolders /"EUN".

3. Restart Acrobat.

To use the Dynamic Exhibit Stamp tool

Launch Acrobat, and open the PDF you wish to apply an exhibit stamp to
1) Choose Comment, Annotations, Stamp Tool (you can also add it to your toolbar)
2) Click the Stamp Tool
3) Choose the 'Exhibit Stamp' category
4) Choose a stamp style and click to place it on the document
5) Enter the Exhibit Number, when prompted
6) The stamp will be placed on the document, and can be re-positioned as needed.

For assistance with this tool, contact ut_support@utd.uscourts.gov(link sends e-mail)