

OSB Professional Liability Fund presents

# PDFing for Success: Adobe Acrobat Pro Updates

Friday, June 3rd  
10:00 am – 10:30 am

MCLE ID 88565  
.5 Practical Skills Credit

Speakers: **Monica Logan**  
*Practice Management Attorney*

# CLE Materials

- PowerPoint Slides
- Step-by-Step Tutorial
  - Compare
  - Stamp
  - Custom Command and Actions
- Additional Resources

# PDFing for Success: Adobe Acrobat Pro Updates

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Professional  
Liability Fund

*Presented by:*  
Monica Logan  
Practice Management Attorney  
Oregon State Bar Professional Liability Fund

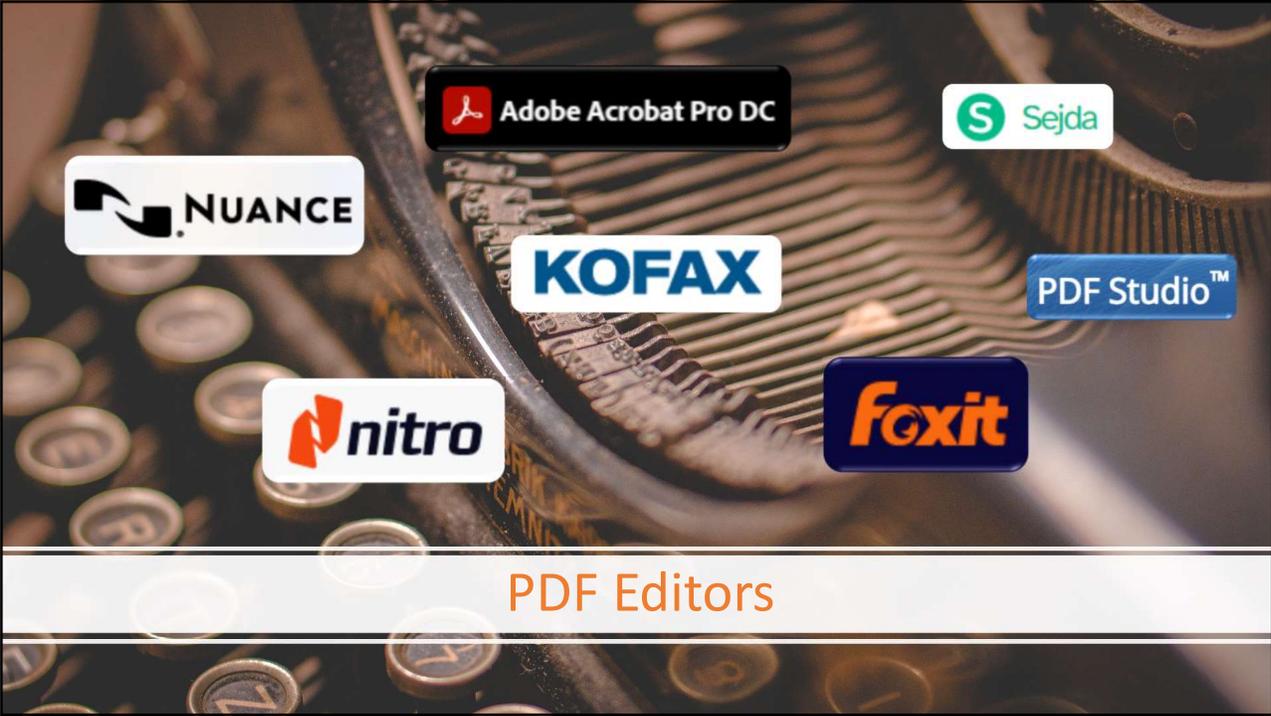
1



## Portable Document Format (PDF)

- PDFs in Legal Context
- General Features
- Specific Features for Today

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# Comparison Tool

- Two Documents Simultaneously
- Comparison Report
- Individual Changes Review



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 A graphic design for a tutorial. On the left, a typewriter is shown with a sheet of paper that says "Tutorial". The typewriter is dark green and black. On the right, a screenshot of the Adobe Acrobat Pro 2020 interface is displayed. The window title is "Fee Agreement2.pdf". The document content includes:
 

**FEE AGREEMENT - AUTHORIZATION TO CHARGE CREDIT CARD**

**HOURLY FEE AGREEMENT - AUTHORIZATION TO CHARGE CREDIT CARD**  
(Sample - Modify)

THIS FEE AGREEMENT ("Agreement") is made this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ between [Name of Client], referred to as "Client," and [Name of Attorney], referred to as "Attorney".

1. Client agrees to employ Attorney for representation in a legal matter in connection with [type of matter].
2. Attorney consents to accept such employment and agrees [set forth appropriate details]. This representation does not include or extend to any other representation unless specifically described above.
3. Client agrees to cooperate fully with Attorney and others working on Client's case by keeping appointments, appearing for depositions, producing documents, attending scheduled court appearances, and making all payments. Client also agrees to keep Attorney informed of any change of address or telephone number within five (5) days of the change.
4. The fee for legal services on behalf of Client shall be Client's sole responsibility and shall be billed at the rate of \$[dollar amount] per hour for [Attorney], at \$[dollar amount] for [paralegal] and at \$[dollar amount] for [secretary]. Attorney reserves the right to increase the hourly rates set forth above from time to time.

5. Client agrees to pay all costs incurred by Attorney, including but not limited to filing fees, service

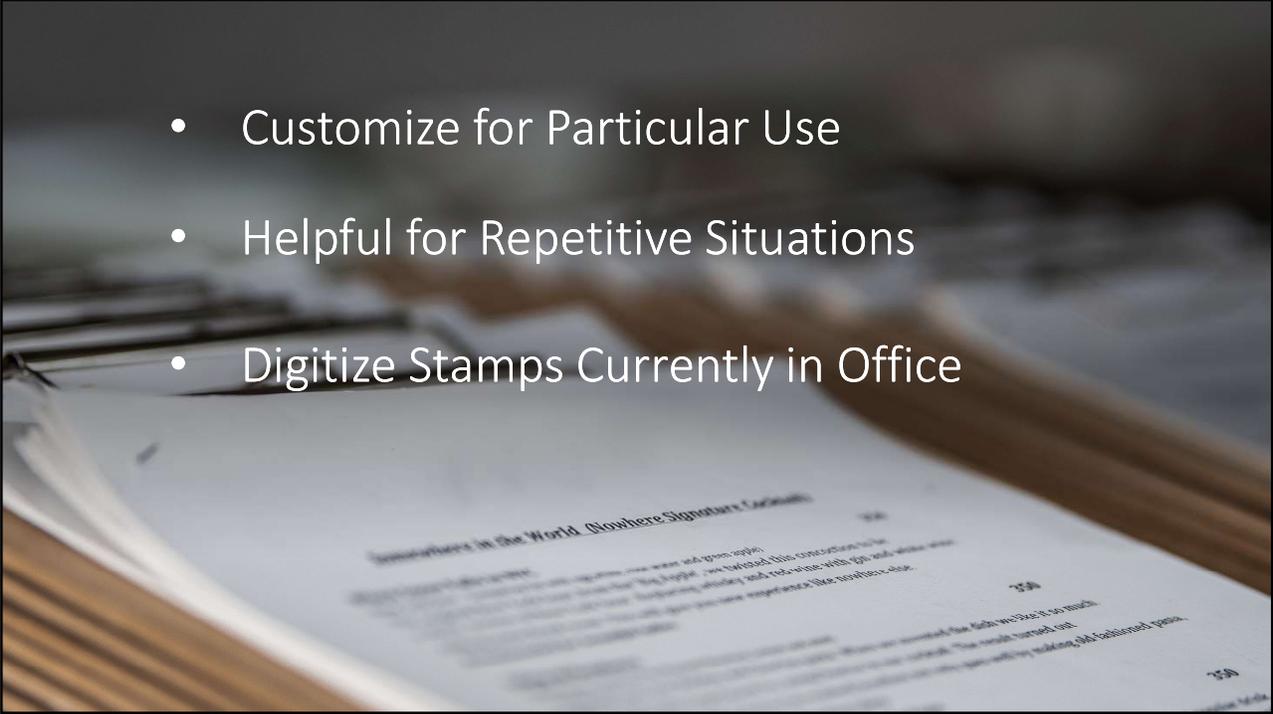
 The interface also shows a sidebar with tools like "Create PDF", "Combine Files", "Edit PDF", "Export PDF", "Organize Pages", and "Comment".

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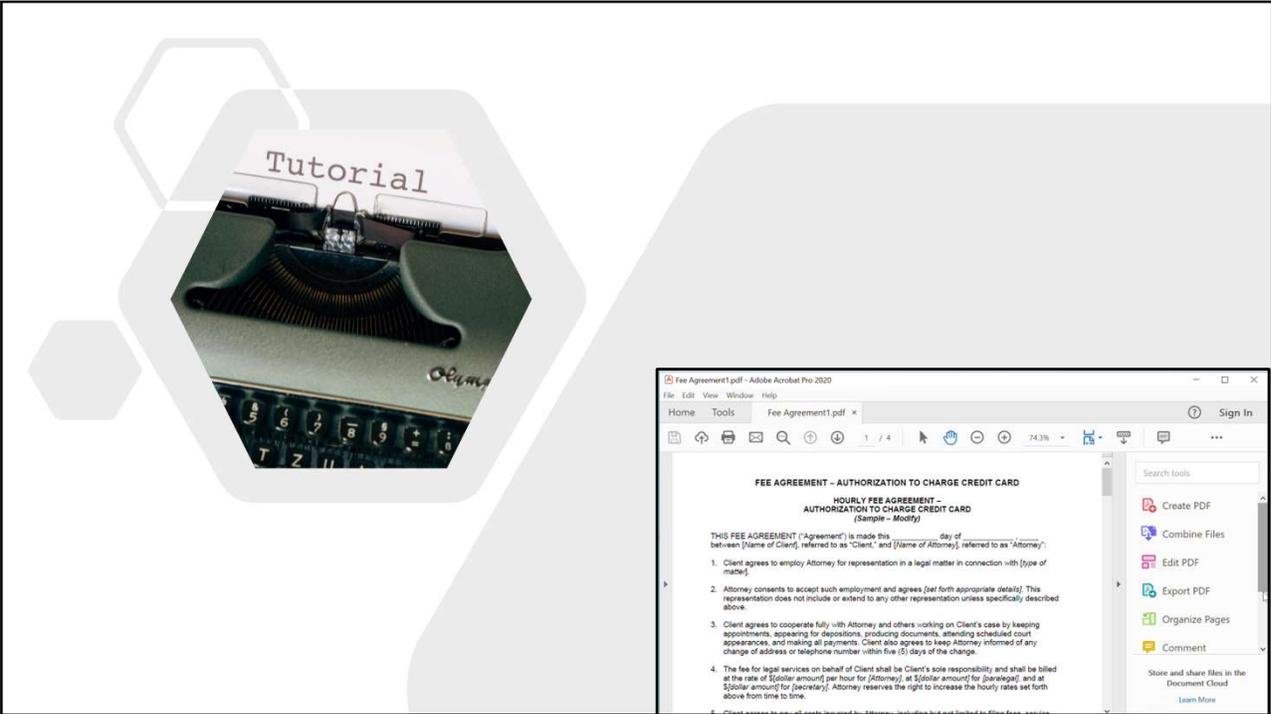
# Custom Stamps

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- Customize for Particular Use
- Helpful for Repetitive Situations
- Digitize Stamps Currently in Office

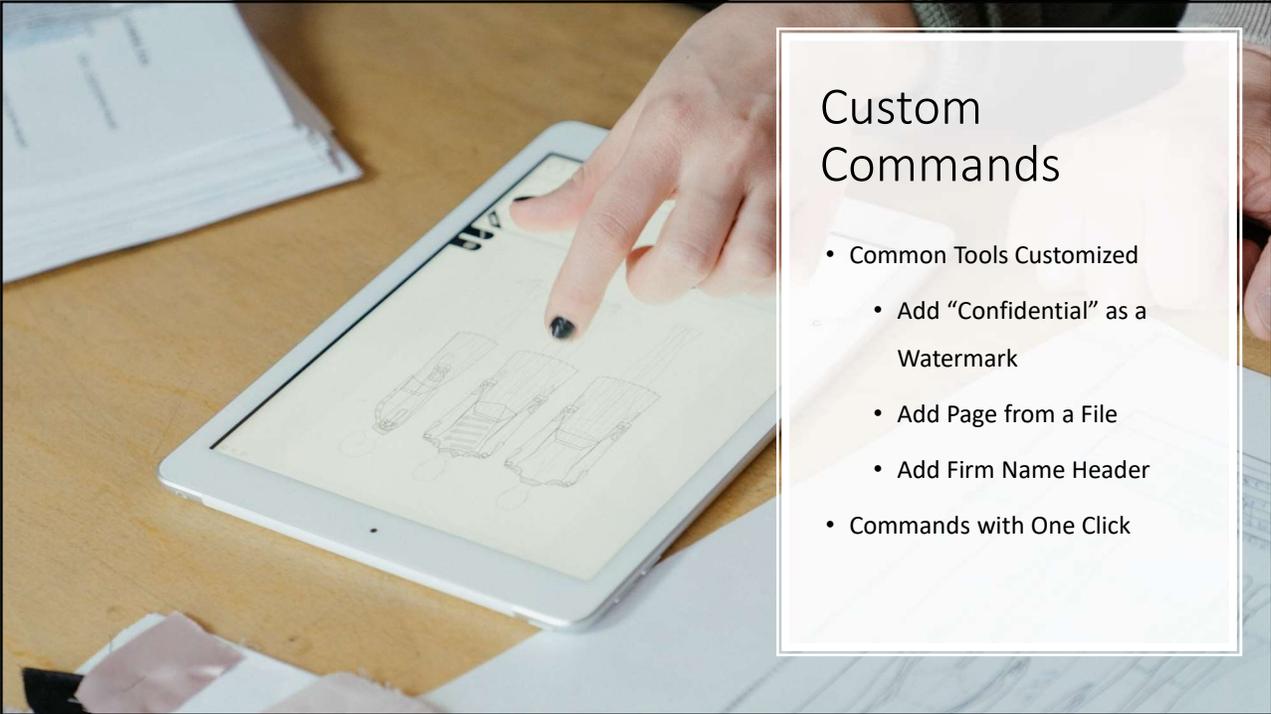
8



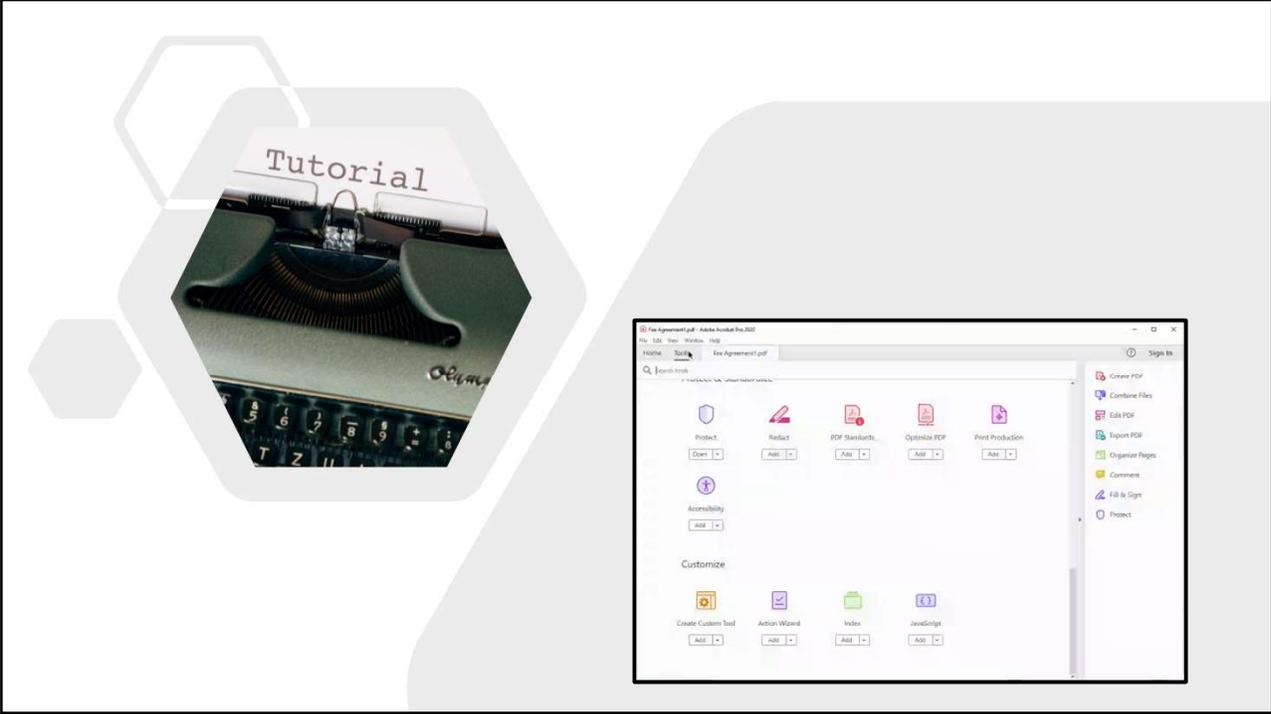
9



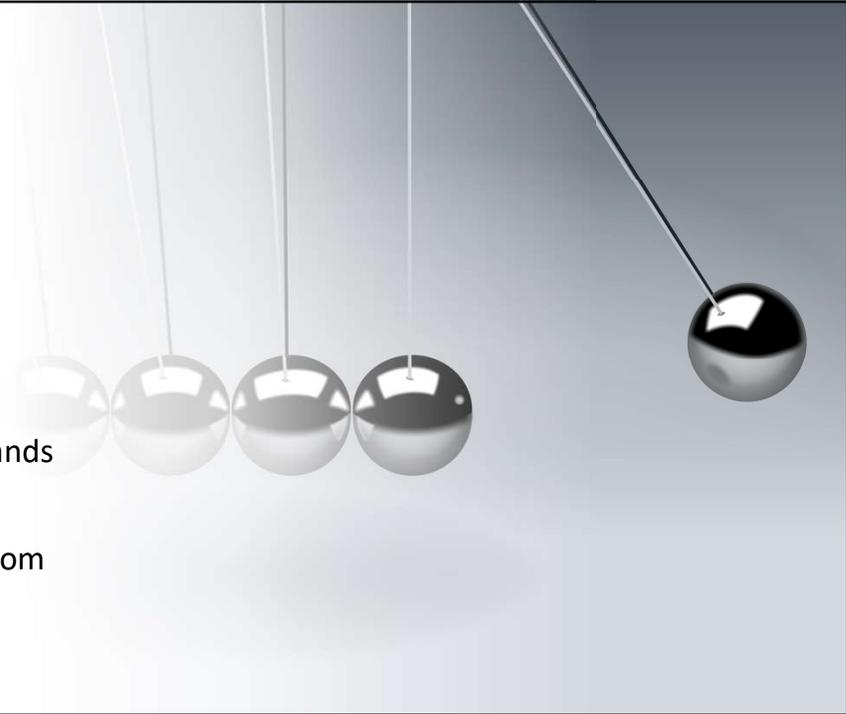
10



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## Custom Actions

- Extension of Custom Commands
- Series of Custom Commands Executed At Once
- Prompt Available or Custom

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**Remove**

- Delete All Comments
- Remove Header and Footer
- Remove Background
- Remove Watermark

**Label**

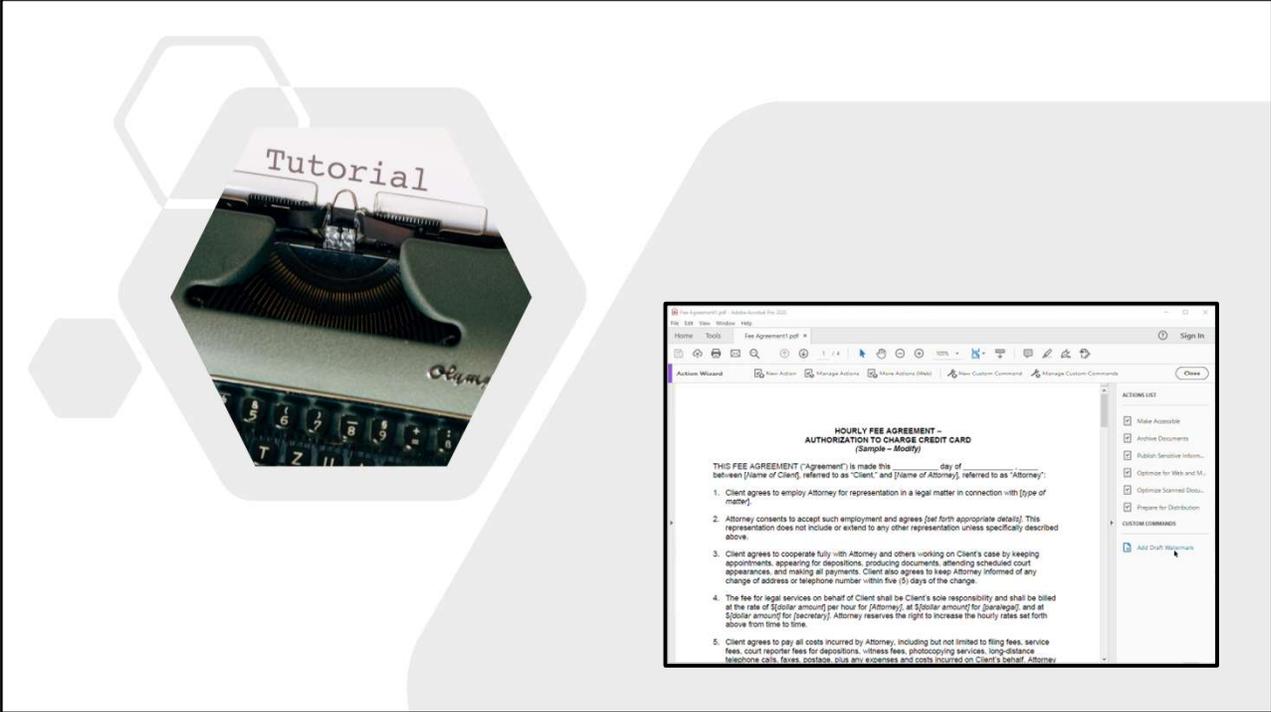
- Label as Exhibit A and Page Number

**Prepare**

- OCR
- Remove Metadata
- Save

Example Action Steps

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# Conclusion

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- Stay Updated
- Customization Trend
- Design Tools for Office Use

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## The **Ultimate** Guide to Adobe® Acrobat® DC

### Resources

- *The Ultimate Guide to Adobe Acrobat DC, Second Edition*  
By Daniel J Siegel and Pamela A Myers
- Other Useful Features: Send for Signature, Fillable Forms, Advanced Redaction, Password Protection



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## Contact Us

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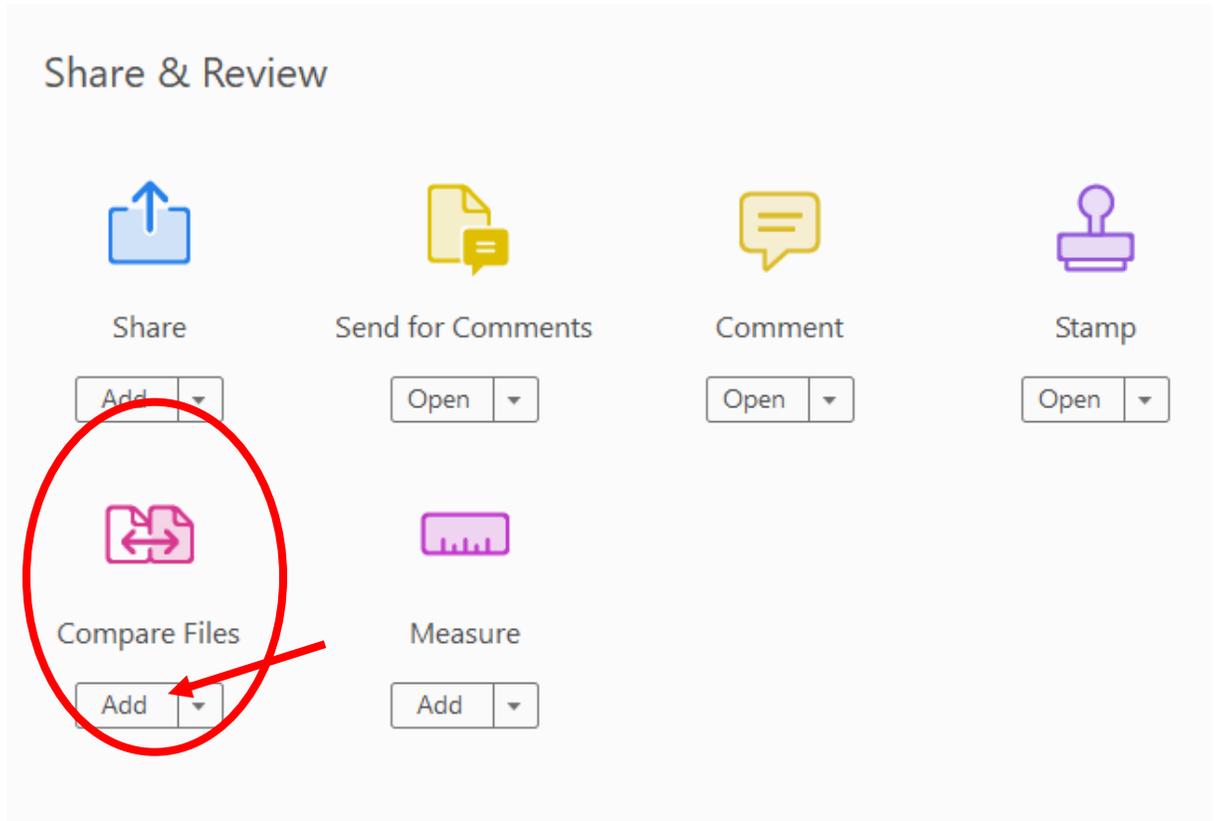
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# COMPARE FILES

1. You will need to add the “Compare Files” tool to your shortcut menu panel on the right side of your Adobe Pro. First, search for it under the More Tools option at the

bottom of the shortcut menu. 

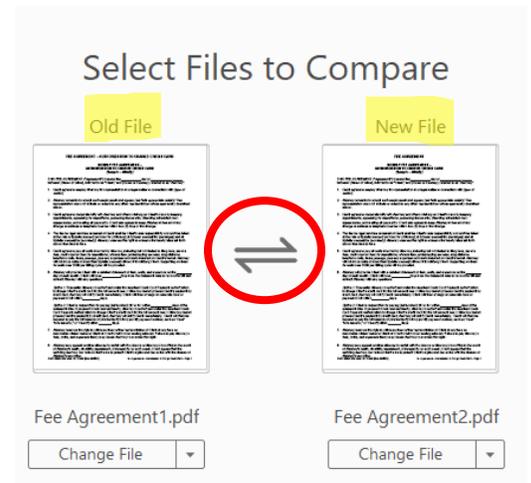
Find the “Compare Files” tool and add it to your shortcuts by clicking on “Add” underneath the name and icon.



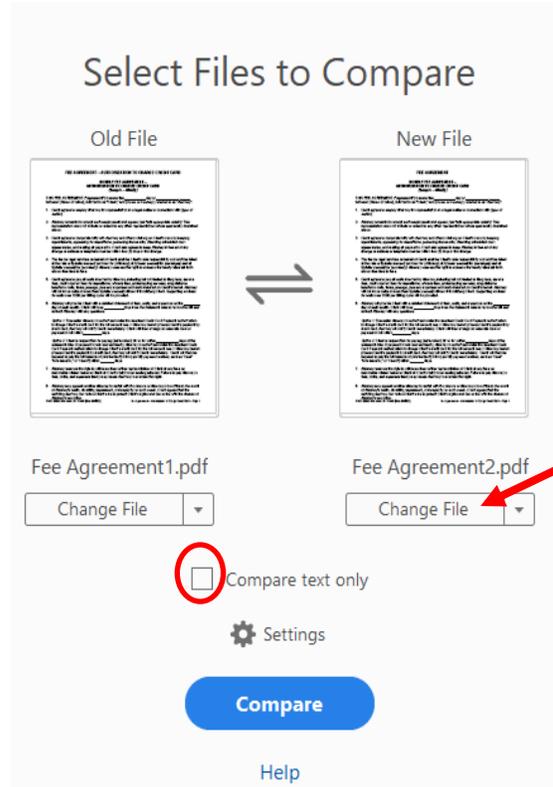
2. Once it is added, find the button for the comparison tool.



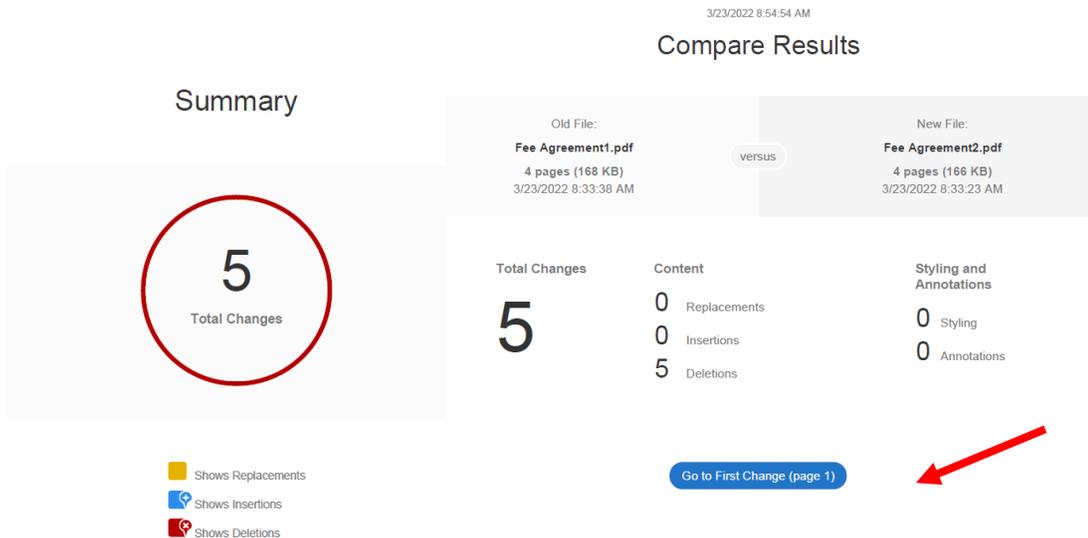
3. Click on the button to active the comparison.
4. You will be shown previews of two files. One says, “Old File” and the right says, “New File.” The program will compare the new file against the old file. If you have two files open, it will assume two of those as the files you want to compare. If those two files are not in the correct position, the two lines between them switch their positions.



5. If you would like to use a different file, you can click the “Change File” button to find another document in your system. You can also select the checkbox to compare text only.



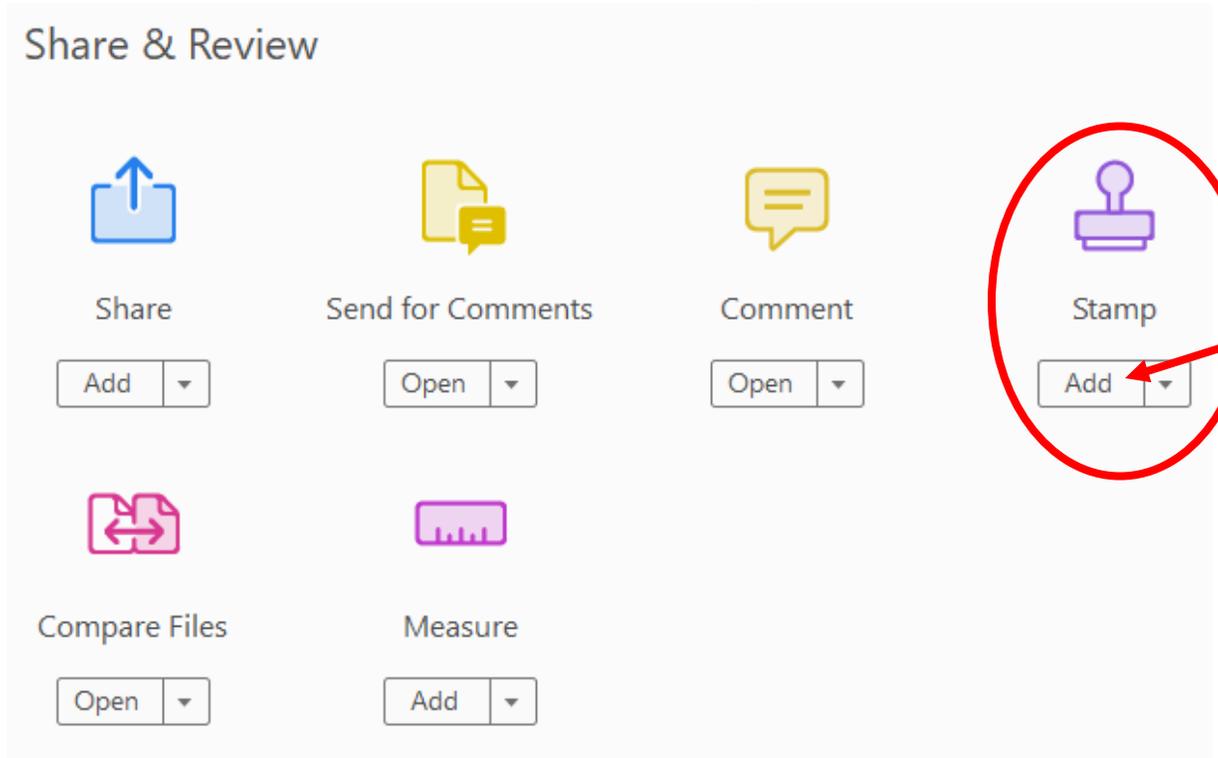
6. Click “Compare.” Adobe will scan both and provide an overall summary of the changes on the left-hand document, and a detailed review of each change on the right-hand side. Within the detailed view pane, you can see each change by clicking the blue button, “Got to First Change.”



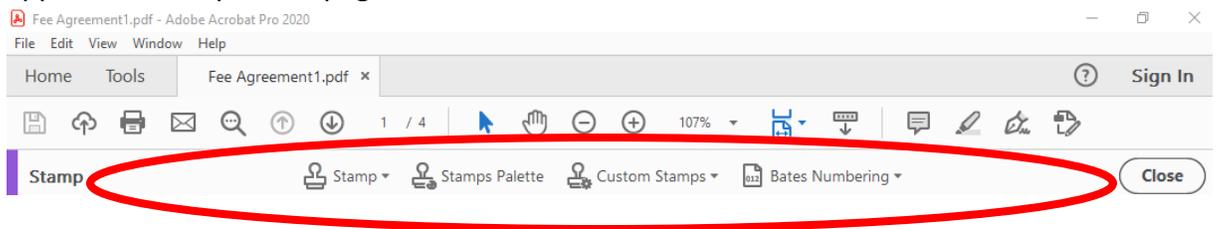
# STAMPS

1. You will need to add the “Stamp” tool to your shortcut menu panel on the right side of your Adobe Pro. First, search for it under the More Tools option at the bottom of

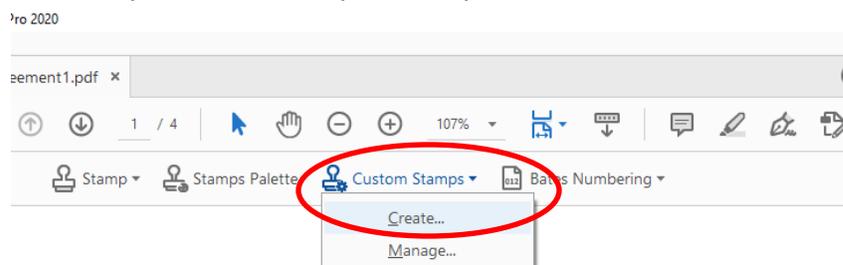
the shortcut menu.  More Tools Find the “Stamp” tool and add it.



2. To create custom stamps, save the stamp image on your computer. Open the document you want to stamp and click the “Stamp” tool. A new tool menu should appear at the top of the page.

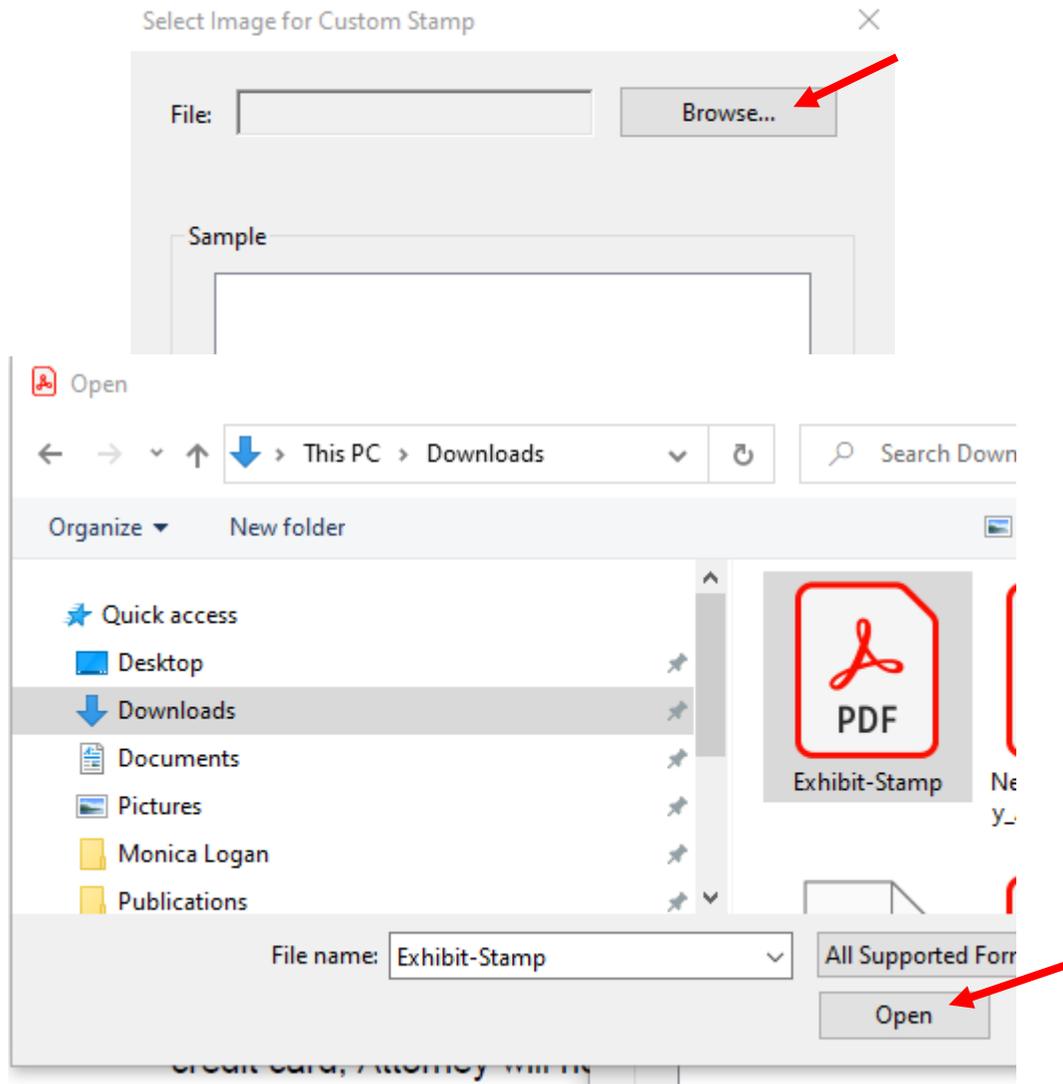


3. Click “Custom Stamps”, which will open a drop-down menu. Click “Create.”

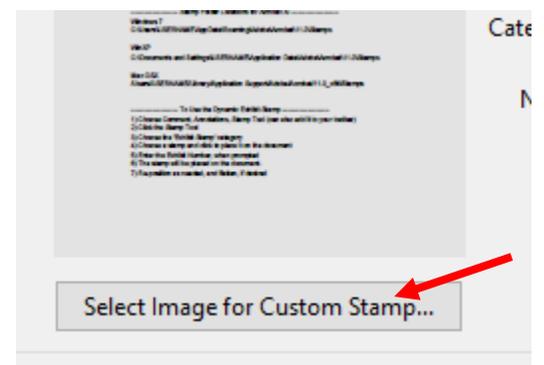


EE AGREEMENT – AUTHORIZATION TO CHARGE CREDIT CARD

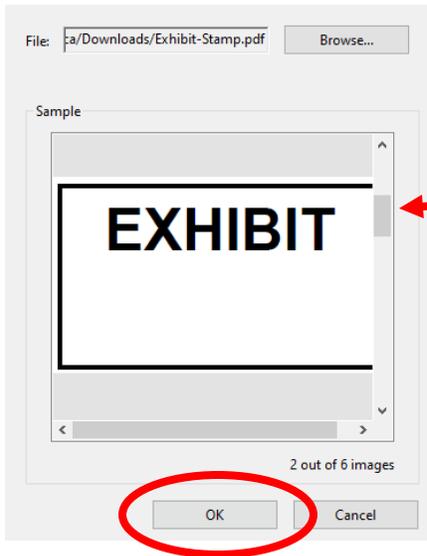
4. A new menu will pop up that will allow you to upload a file. Click “Browse.” And find the document with the saved pictures you want as a stamp. Then click, “Open.”



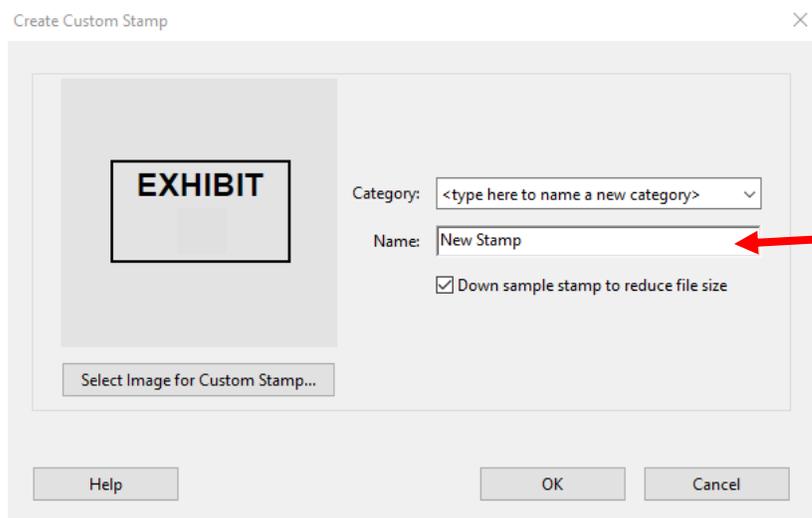
5. The previous menu will show a preview of the pictures contained in the document you uploaded. Click “Okay.”
6. The next page of the menu will allow you to categorize your stamp, name it, reduce the file size of your stamp, and select the image.
7. Select the image from the document, if it is not clear, by clicking on the button under the preview screen labeled, “Select Image for Custom Stamp...” A new window will appear that will allow you to scroll using the right-hand scroll bar to find the image you want in the document.



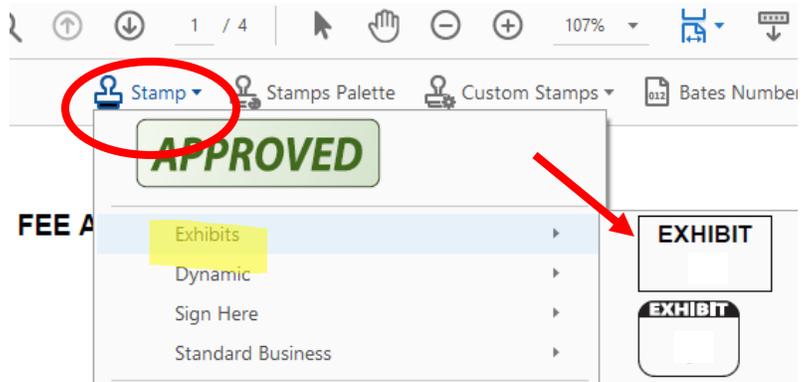
Select Image for Custom Stamp × When you find the image you want, click “Ok.”



8. The newest pop up menu should disappear, and you will now see the original menu for creating a stamp. The image for the stamp should have updated based on your previous selection. Type in the name you want for the stamp. You can click into the drop down menu to create a new category (ex. “Exhibits”). Press “Ok” when done.



9. Now, when you press the drop down menu for “Stamp” at the top bar, you will see your new category and your new stamps.



10. Press the stamp you want. The first time you use a new one, the program will ask if you want to add identifying information to the digital stamp. When you are done, press "Complete" or "Cancel".

Identity Setup

Please enter the identity information that will appear on your digital identity stamps.

Identity

Login Name: monica

Name:

Title:

Company:

Department:

Email Address:

Don't show again

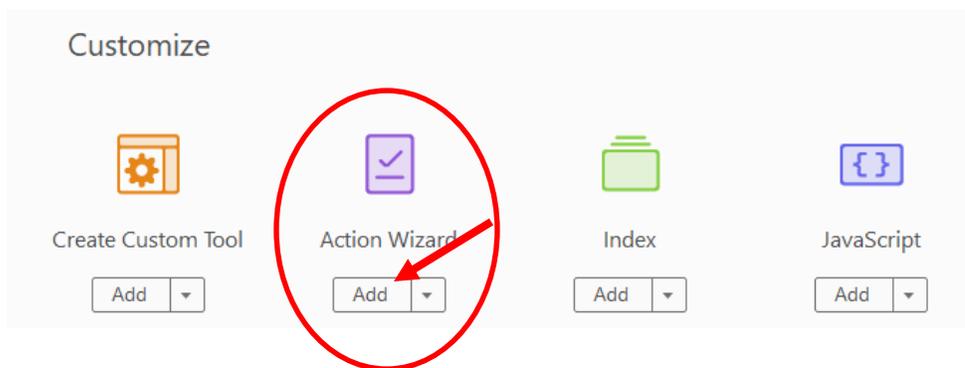
Complete Cancel

11. Then, place the stamp on the document where you want it. You can then add in information into the stamp for the different exhibit numbers with the Edit feature.

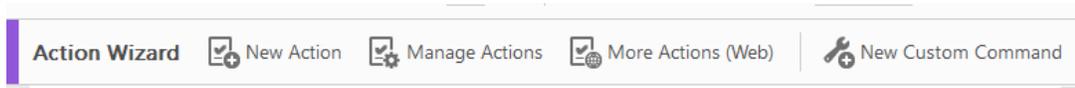
# CUSTOM COMMANDS AND ACTIONS

## I. CUSTOM COMMANDS

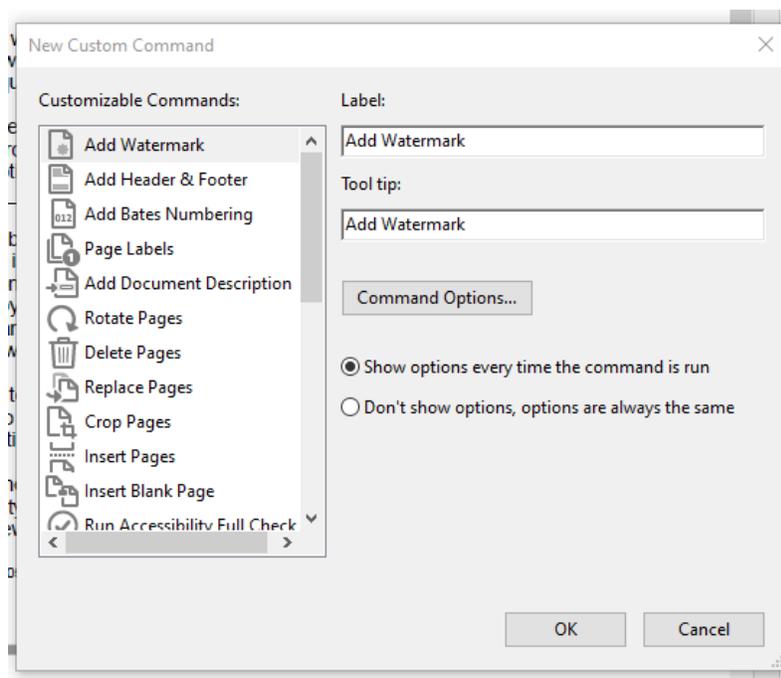
1. Custom Commands can be added to the PDF toolbar within the “Action Wizard”. To add the Action Wizard, find it under  More Tools . It is typically at the bottom, under “Customize.”



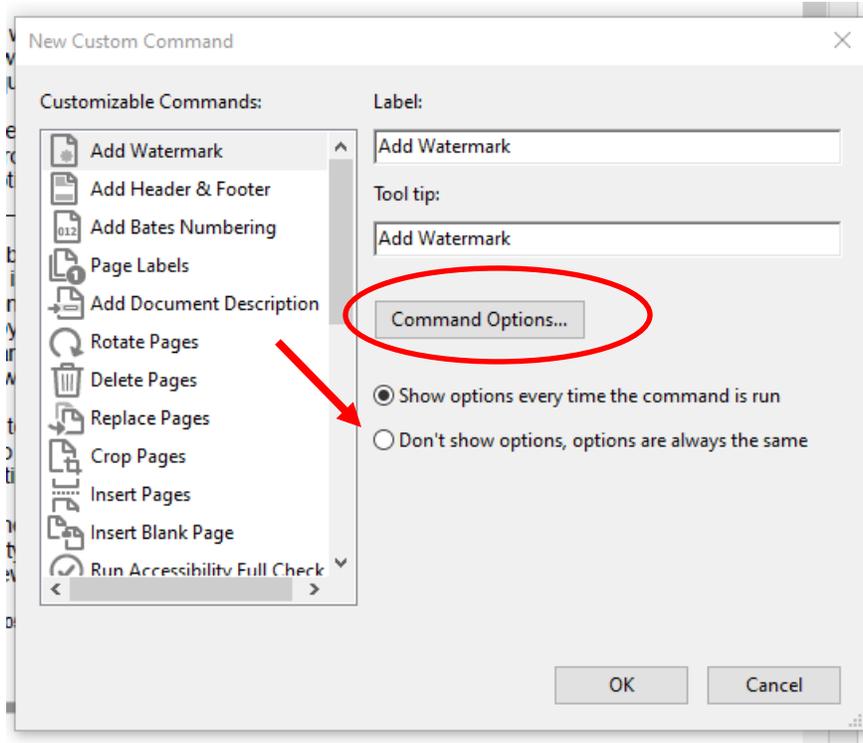
2. Click on the Action Wizard, and you will see the new menu appear under the top ribbon.



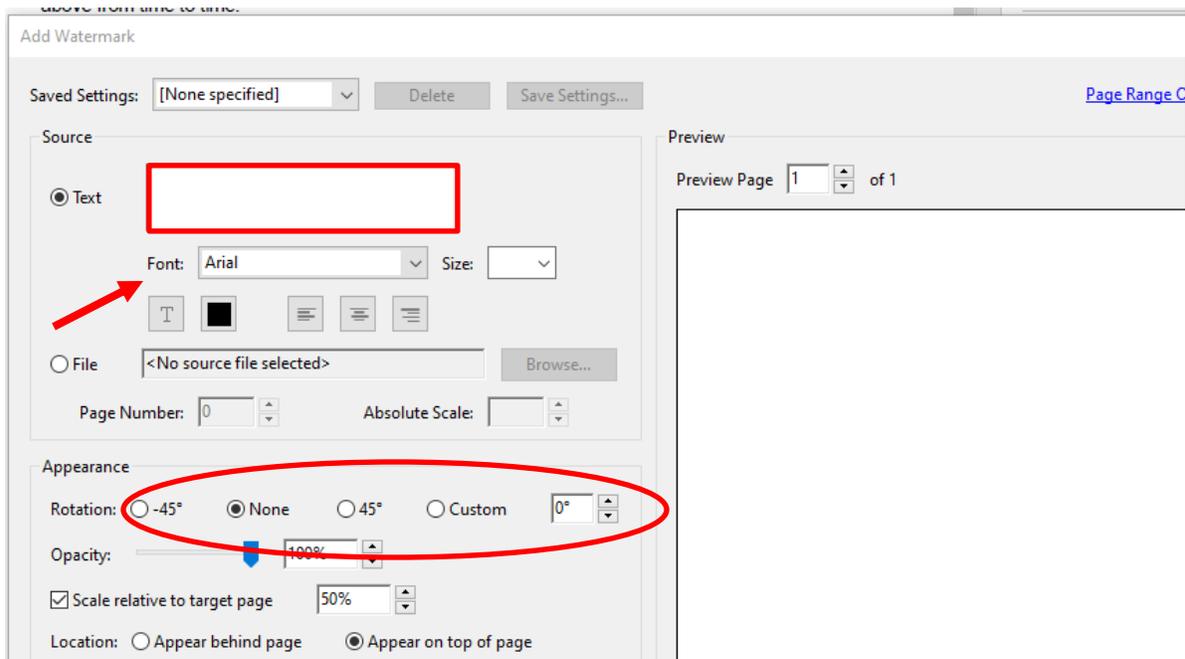
3. To create a custom command, click “New Custom Command.” A pop window will appear that allows you to create a label and choose your tool for your custom command.



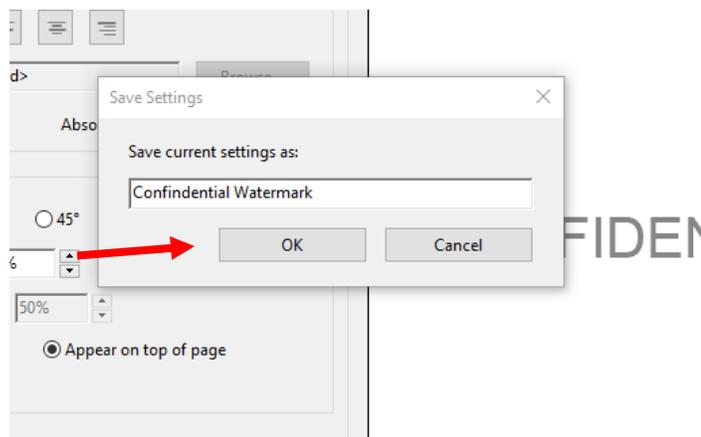
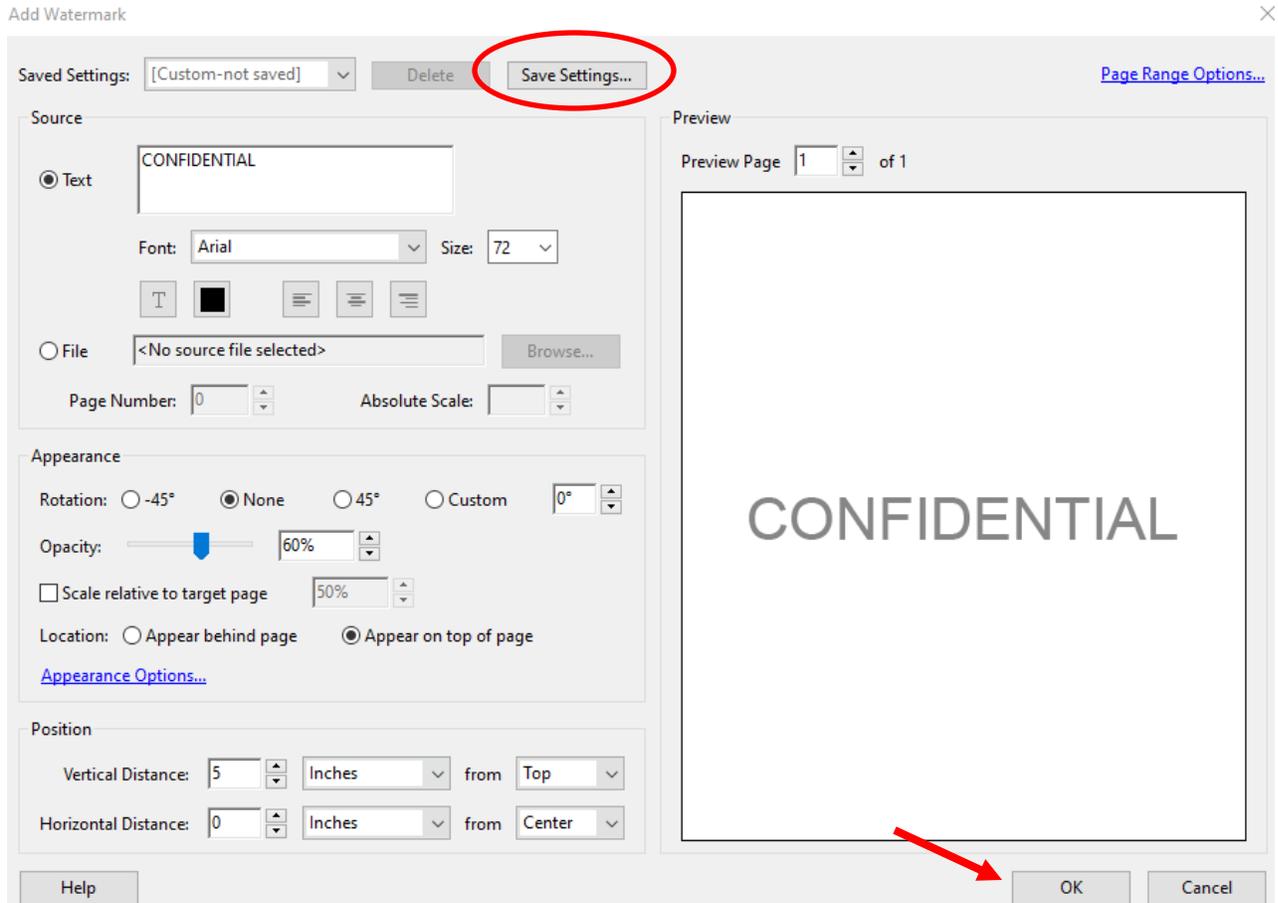
- Once you choose the tool you want to make custom and a name, determine if you want to choose the options every time you click on it, or if you want to include your custom options each time you press the command to run. Then, click "Command Options."



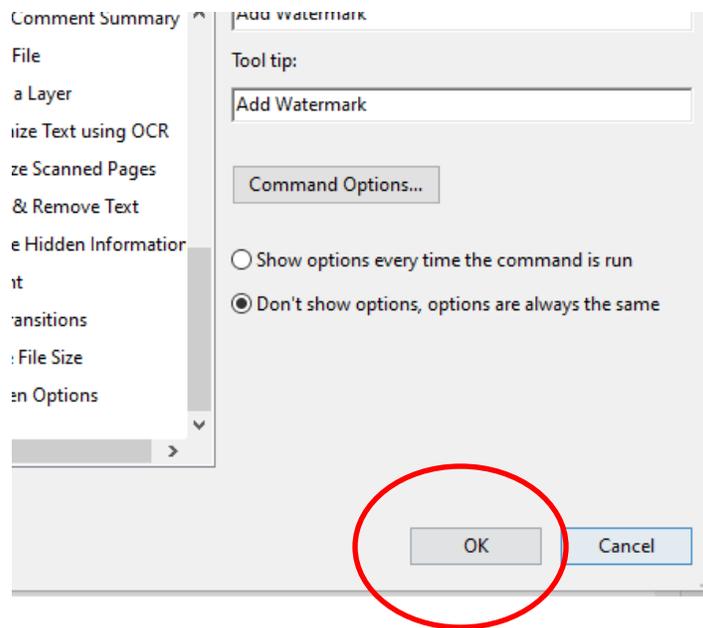
- Once you open the options for the particular command, a new menu will appear to allow you to customize the result of the tool. In our example, a watermark can be any text in any font. You can choose the angle on the page.



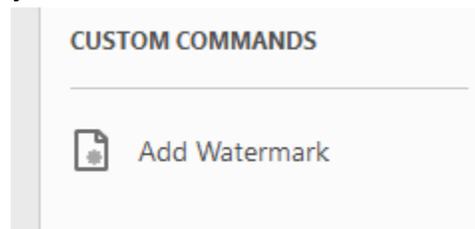
6. Once you are done selecting your settings for the command, determine if you would like to save those settings. You can do so by clicking on “Save Settings” at the top of the menu. You will be allowed to name your setting. Click “Ok” when you are done.



7. Next, click Ok in the original menu for the custom command when you are done with your settings and options.



8. Now, on the right-hand side, you should see the addition of the custom command name you just created.

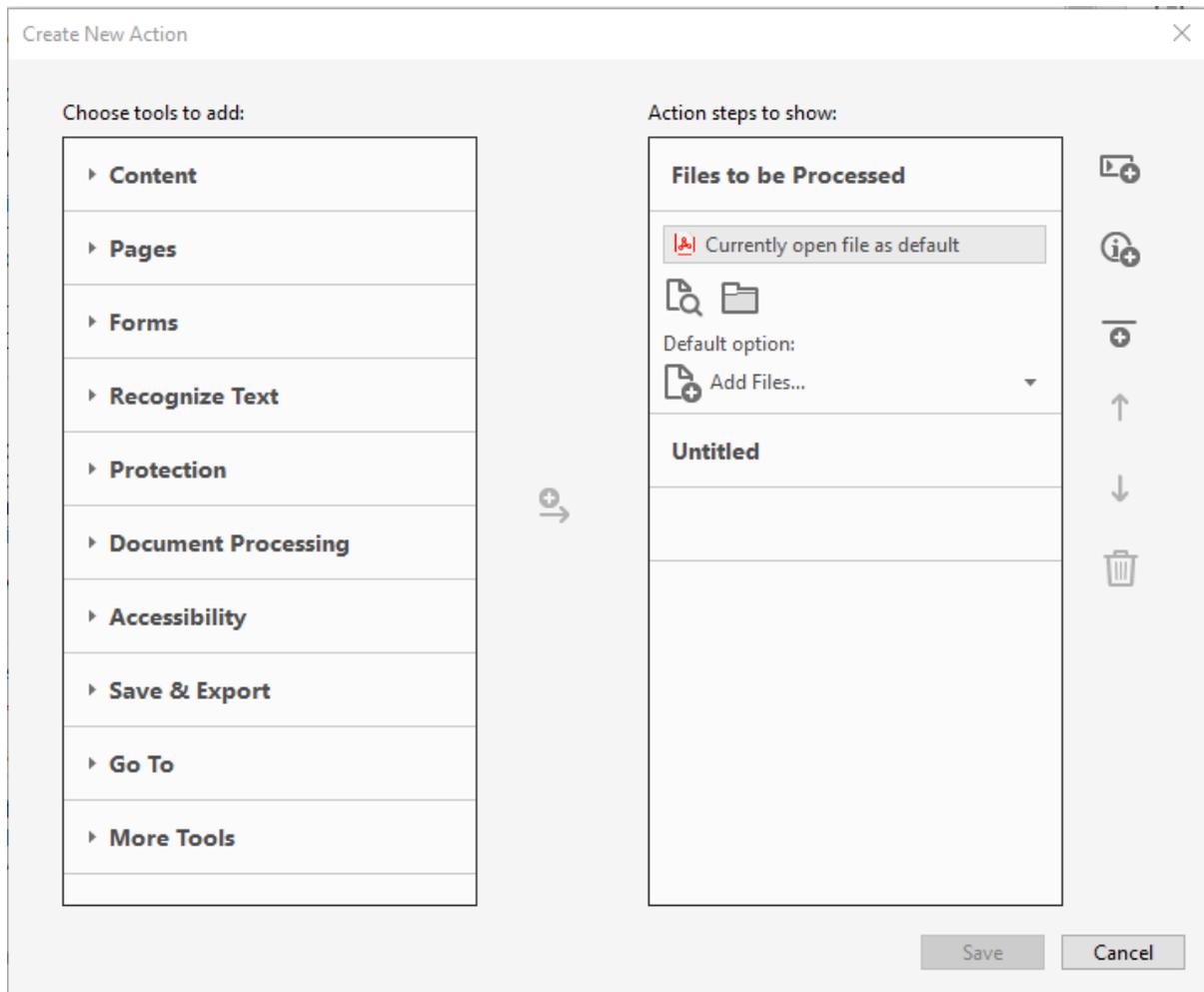


## II. ACTIONS

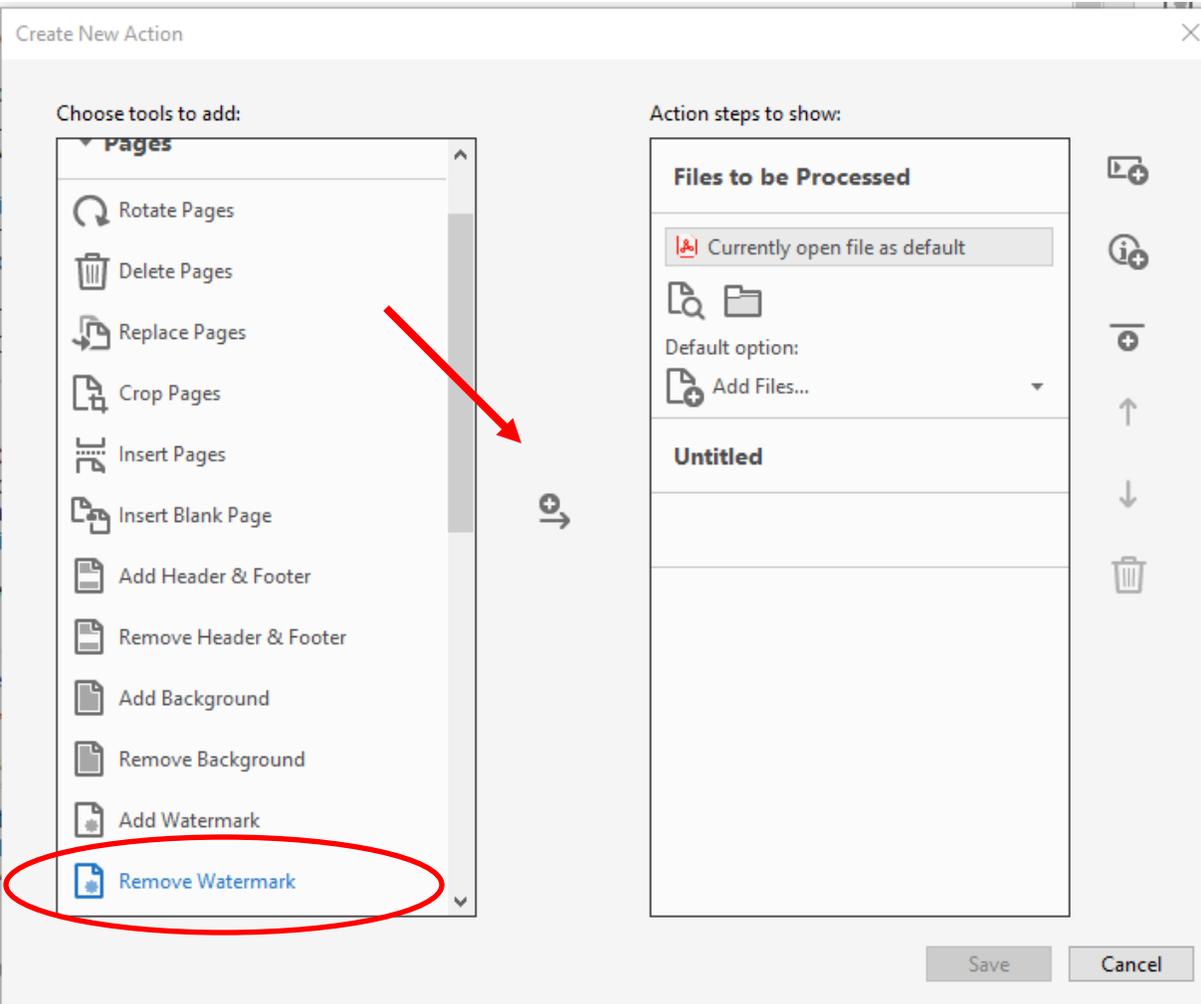
1. Actions are very similar to custom commands except that they are a series of custom commands executed one after the other. For this tutorial, I will use the example of making a document ready to e-file that I am labeling Exhibit A. You should start any action list with a goal in mind. There are three parts to my action list.
  - a. Removing any other headers, footers, comments, backgrounds, or watermarks, and flattening the document to reduce the size and keep any text edits.
  - b. Adding a footer to label the document, Exhibit A with a page number.
  - c. Prepare the document for e-filing by making it readable text, removing metadata and saving it.
2. Once you have in mind the steps you need to complete the goal of preparing the document, find and click “New Action” on the top menu ribbon.



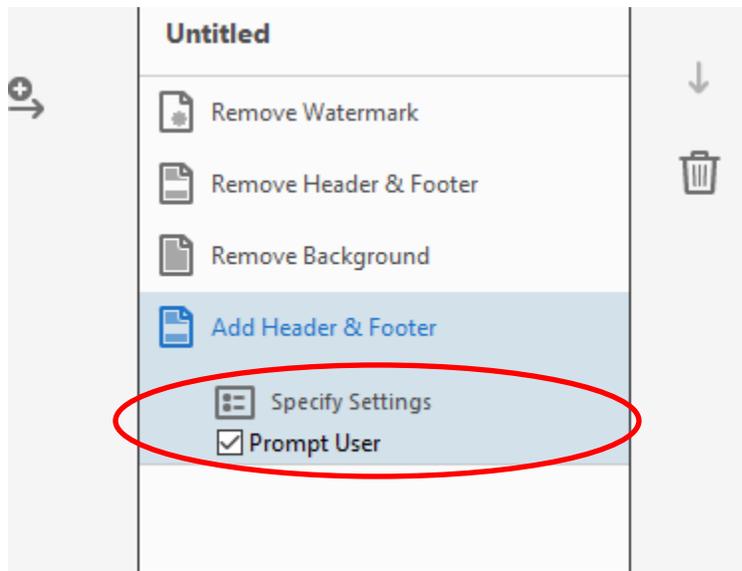
3. A dual-sided menu will pop up. On the left side are a list of actions to include in your actions list. On the right is the compiled list so far. The first item on the list to do is to run the actions on the document that is currently open, which is the default setting. Underneath, is a bold "Untitled," which is where you can add a name for sections of your actions list. This is not required, but if you are doing multiple steps and wish to organize them, you can separate them by this "panel title."



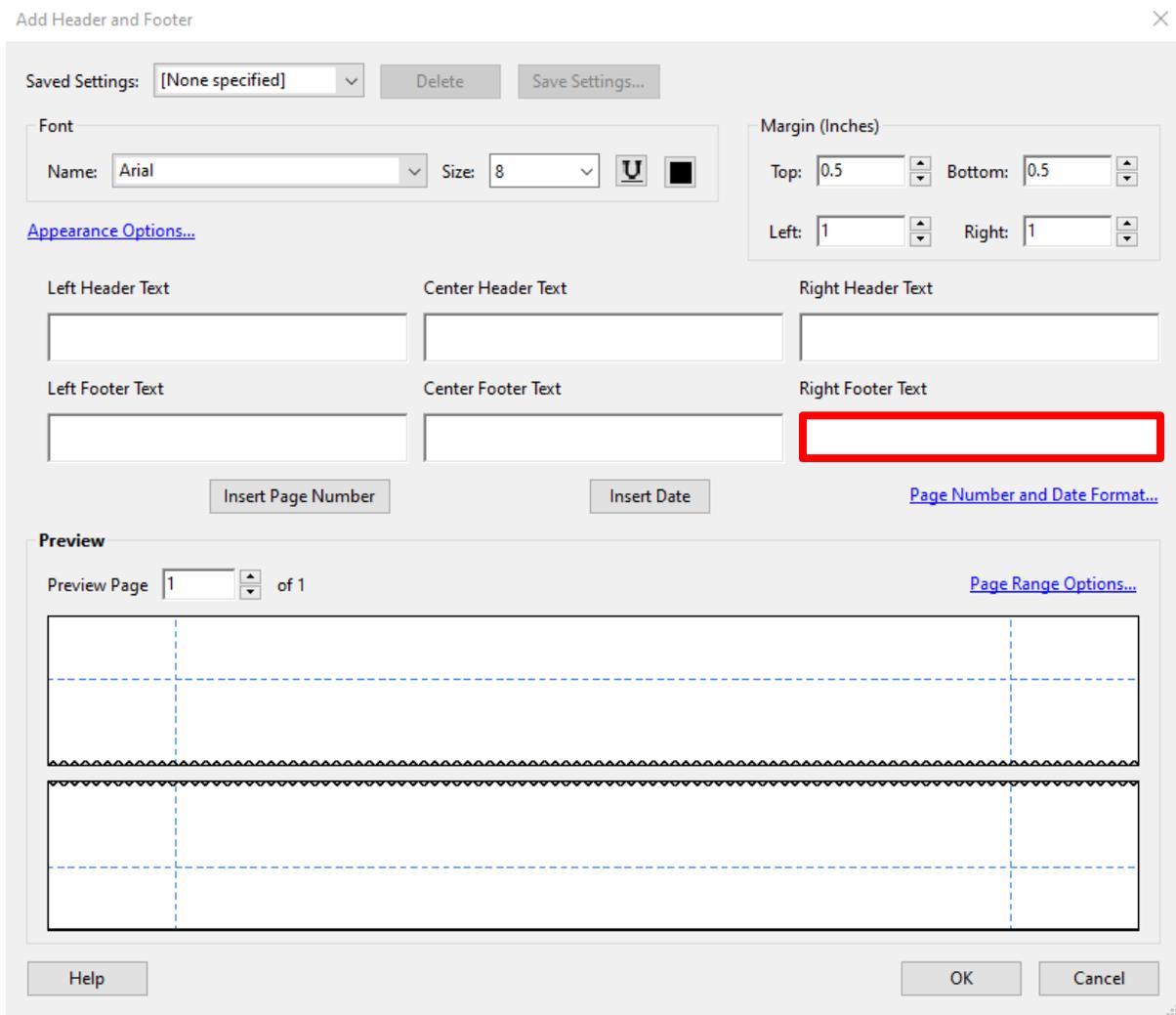
4. To start adding actions, find the category and the action you want to add on the left-hand side. My first action is to remove watermarks, which is under the category "Pages". Once you find and select it, you can add it to the actions list by clicking the small + symbol between the two panels. If you accidentally added an item, you can delete it by selecting it, and pressing the trash can icon on the right side.



5. If you add an action that requires additional input, like a header or footer, you will see an option to “Specify Settings.”



You can either be prompted each time to add the necessary information, or you can identify what kind of header or footer you want to add. Click on “Specify Settings.” You will see the same type of menu as in the custom command tutorial. Here, you can choose a previously saved setting or you can make your own and save it for future use.



6. For an Exhibit Label, you can specify it to be in a particular place, like the bottom right of the footer with a page number. I input the text I want and the size. Then, click “Insert Page Number,” which will add the page number to where your cursor is.

The image shows a dialog box for configuring page layout settings. It is divided into several sections:

- Header Text:** Three input fields for "Left Header Text", "Center Header Text", and "Right Header Text".
- Footer Text:** Three input fields for "Left Footer Text", "Center Footer Text", and "Right Footer Text". The "Right Footer Text" field contains the text "EXHIBIT A - PAGE <<1>>".
- Buttons:** "Insert Page Number" (circled in red), "Insert Date", and a blue link "Page Number and Date Format...".
- Preview:** A section labeled "Preview" with a "Preview Page" dropdown set to "1 of 1" and a blue link "Page Range Options...". Below this is a large rectangular area showing a preview of the page layout with dashed lines for margins and a decorative horizontal line. The text "EXHIBIT A - PAGE 1" is visible in the bottom right of the preview area.
- Footer:** "Help", "OK", and "Cancel" buttons.

7. When you are done specifying your settings, you can click "Save Settings" and "Ok."
8. When you are done adding your items in your action list, click "OK." The program will prompt you to name your Action and provide a description. When that is saved, it will now appear in your "Actions List on the top right menu bar.

## Additional Resources

- Adobe Steps re: Managing Actions and Custom Commands  
<https://helpx.adobe.com/acrobat/using/action-wizard-acrobat-pro.html>
- Advanced PDF Tools  
[www.Pdfscripting.com](http://www.Pdfscripting.com)
- ["PDF Skills: I didn't Know I Could Do that!"](#)  
Lawyers Concerned for Lawyers, MA; by Daniel J. Siegel
- "Getting the Most out of Adobe Acrobat Forms"  
ABA On Demand CLE; by Daniel J. Siegel and Pamela A. Myers  
<https://www.americanbar.org/events-cle/ecd/ondemand/414731894/>
- [The Ultimate Guide to Adobe Acrobat DC, 2nd Edition](#)  
By Daniel J. Siegel and Pamela A. Myers  
[Amazon Order Link](#) (\$79.95)
- [Adobe Password Protection Tutorial](#)
- ["Go Paperless in the workplace with Adobe online PDF Tools"](#)