

**PROFESSIONAL LEGAL TRAINERS GROUP
MEETING MINUTES**

APRIL 9, 2004

The meeting was held at the law firm of Paul, Hastings, Janofsky & Walker LLP at 75 East 55th Street. Dawn Bolston, President, called the meeting to order and presented the treasurer's report. Dawn thanked Jeanne Marie Boswell for hosting the meeting.

PDF files are universally used in New York law firms today. A presentation of Adobe Acrobat and ScanSoft products proceeded.

Tim Plummer, Sr. Acrobat Specialist via Microsoft Live Meeting

- Adobe Reader 6.0 – free and downloadable
- Adobe Acrobat 6.0 Standard - \$275
- Adobe Acrobat 6.0 Professional - \$450
- Adobe Acrobat Elements 6.0 - \$50
- Discount transactional programs are available for 5 or more seats

Tim stated that paper documents will not disappear entirely but he touted the reasons that Adobe Acrobat is a solution for legal professionals. Adobe Acrobat's Portable Display Format (PDF) files have become an international standard for efficient transfer of information. Among the many reasons that law firms benefit from the use of PDF files are as follows:

- Easy email or web distribution of files
- A PDF file or an archive of PDF files are searchable
- eFiling to United States Federal Judiciary
- Collaboration and review of PDF files
- Security features assure authenticity of files
- Standard specifications for digital documents

Tim demonstrated the features of Adobe Acrobat 6.0. The settings for the conversion to a PDF file may be saved to use again. Any specifications for a job that may be repeated later should be saved for reuse. Multiple files of various applications and scanned pages may be compiled into a hybrid PDF file. A marked-up copy can be scanned to PDF and incorporated into an existing PDF.

Tim showed three ways to do a paper capture to make the text in a PDF file searchable: 1) formatted text and graphics, 2) searchable image *compact* and 3) searchable image *exact*. Legal professional are most likely to work with searchable image *exact* for the best searching capabilities. Additionally the Adobe PDF metadata, such as document title or description is searchable. The Advanced Catalog feature allows many PDF files to be indexed and then searched as an indexed group.

Repurposing the PDF to Word may be accomplished by selecting in the PDF file, copy and paste into Word or selecting in the PDF file and Save as RTF.

Security features for PDF files include password protection, view only, no printing, and no copying.

Review and Comment opens a panel to the right side of the screen with relevant links. One link creates an email with the PDF file attached to all reviewers. As the recipients of the email open the PDF file to-be-reviewed the review and comment panel and tools will be available. Comments, rubber stamps, or pencil markings can be added to the PDF. Review Tracker allows the sender to see if any reviews are outstanding. Once all the reviewed files are returned to the sender all suggestions from all reviewers will be incorporated into the PDF. Much like Word's Track Changes the author may accept or reject the comments from the reviewers. The file may be printed with all the comments to the side. With Adobe Acrobat Professional the Optimizer can clean up any traces of the comments from the file.

Tim showed how a bookmark to a zoomed in portion of an Excel PDF is a technique to key in on important numbers. He suggested that many presentations are now done as a PDFed PowerPoint so that the file is smaller and sharable with anyone.

Adobe Acrobat legal solutions - <http://www.adobe.com/products/acrobat/legalsolutions.html>.

Adobe Acrobat training - <http://www.adobe.com/misc/training>

Tim opened the floor to questions.

1) What considerations should be taken if the resulting PDF is not accurate? Either the document contains typefaces that do not meet Adobe standards or the use of PDF Writer caused the problem. PDF Distiller provides the best results.

2) What is the best way to create PDF fill-in forms? Use Adobe Acrobat 6.0 Professional.

3) Is the Comments & Review feature backward compatible? No, all parties need 6.0. Anyone who receives a 6.0 Comments & Review file will be able to print the PDF and must mark it manually. In 6.0 it is possible to Save As an older release, 5.0 etc.

4) Is it possible to compare two PDFs? Yes, the result shows changes in a purple hexagon.

5) If a Table of Contents is created in Word and converted to PDF should clicking a page numbers link you to that portion of the document? Yes, with the correct conversion settings.

Jeff Siegel, ScanSoft Account Manager for NE Region

- PaperPort 9.0 - \$200
- PDF Converter 2.0 - \$50
- Omni Page Pro 14 - \$600
- Volume discounts are available

Jeff Siegel introduced Bill Martin who will be the Account Manager for the NE Region of ScanSoft, Inc. as of April 12. Jeff stated the three major reasons for a law firm to use ScanSoft products: 1) on ramp documents resulting in less paper, 2) searching in PDFs, and 3) repurposing a PDF file to Word or Excel files.

Jeff showed PaperPort's display with a tree structure to the left and thumbnails to the right. A PDF thumbnail may be clicked right and then opened into Word. Multiple PDFs originating from various applications may be ordered and compiled into one PDF file. The PDF may be dragged to an Outlook icon to send as an attachment to an email message. In fact the PDF may be dragged and dropped to Excel, an Image application, WinZip, or OmniForm to repurpose the file. The PDF may be OCR'd for searching.

PaperPort may be used in conjunction with a document management system. Jeff showed how the Enhance Image feature in PaperPort cleaned up an image with stray markings and skewed text.

Jeff showed how easy it is to convert a PDF to a Word document using PDF Converter. For a more robust conversion use OmniPage to assure that tables convert successfully. Font sizes of 8pt or higher will convert successfully now. In the past there was a restriction of 12pt or higher. Jeff showed how easy it is to convert a PDF to a Word document using OmniPage Pro and the review of any characters with a questionable conversion.

Jeff and Bill drew five names from the audience to receive a copy of ScanSoft software.

Respectfully submitted,

Janet A. Smith
Vice President, Secretary
PLTG