



KOFAX / NUANCE POWER PDF ADVANCED for LEGAL PROFESSIONALS

Covering Power PDF Advanced
Versions 2 & 3



KOFAX POWER PDF

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

©2020 Affinity Consulting Group LLC

ALL RIGHTS RESERVED. No part of this work covered by the copyright herein may be reproduced or distributed in any form or by any means, except as permitted by U.S. copyright law, without the prior written permission of the copyright owner.

Kofax and the Power PDF logo are either registered trademarks or trademarks of Kofax in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from Kofax and is not affiliated with Kofax in any manner.

Nuance is either a registered trademark or a trademark of Nuance Communications, Inc. in the United States and/or other countries. Affinity Consulting Group LLC is an independent entity from Nuance Communications, Inc., and is not affiliated with Nuance Communications, Inc. in any manner.

The materials in this book were written using Power PDF Advanced 3 and all steps and instructions were tested prior to the publication date. Your software experience may vary slightly from what is seen in this manual if you have a previous version.

For training or technology assistance, contact us at Affinity Consulting Group LLC - 614.602.5561 or info@affinityconsulting.com. For permission to use materials from this text or product, submit all requests via email to info@affinityconsulting.com.

This is for your personal use only, you may not distribute, modify, or copy the materials, except for archival or backup purposes, without express permission of the copyright owner.

Version 1.05



Invest. Inspire. Empower.

TRAINING



- On-demand training videos
- Software manuals
- Training webinars
- Custom training plans
- On-boarding plans
- Quarterly training reviews

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

affinityconsulting.com/insight



MEET OUR TEAM OF POWER PDF EXPERTS

Meet our team of Power PDF experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching legal professionals how to manipulate PDFs. Barron is not most people. There are few things Barron enjoys more than teaching all-day software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of *Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management*, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.



JOHN FEDERICO

With a drive to make software bend to his will, John pushes the limits of what Power PDF can do with automation tricks. His experience practicing law taught him the value of working efficiently.

When John isn't working in Acrobat, he focuses on automating complex documents with document automation software. He's passionate about creating a simple user interface, reducing the amount of data entry required to generate complex documents. Never one to back down from a challenge, John will find a way to make anything happen.

DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



KOFAX/NUANCE POWER PDF FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

1 INTRODUCTION

PDF File Types.....	1
XPS Files	2
Why Use PDFs.....	2
Power PDF Versions.....	2

2 MICROSOFT INTEGRATION

Word	3
Outlook	4
Excel And PowerPoint.....	6
File Explorer.....	7

3 INTERFACE

Main Window	8
Main Functionality of Each Section	9
Quick Access Toolbar Customization.....	9

4 CREATING PDFS

What Can Be Converted To A PDF.....	11
Creating PDFs From Microsoft Office	11
Creating PDFs From Power PDF.....	21
Creating PDFs From Scanners	21

5 VIEWING PDFS

Scroll Options	23
Full Screen	23
Read Out Loud.....	24
Tabs.....	24

6 CREATING A TEXT-SEARCHABLE PDF

Convert an Image-Only PDF To A Text-Searchable PDF.....	25
Batch Process to Text Searchable PDFs	26

7 COPYING TEXT

PDF Must Be Searchable In Order to Copy Text 28
 Copy Text From a PDF and Insert into Word Processor 28
 Convert PDF to Word Processor Document..... 28

8 EXTRACTING PAGES

Extract Button 29
 Thumbnail Method 29
 Email Pages 30

9 COMBINING PDFS

Thumbnail View..... 31
 Insert Button 32
 Create PDF From Files..... 32
 Document Assembly 33
 File Explorer..... 34

10 PDF PORTFOLIOS

Create a PDF Portfolio 36

11 REDUCING PDF FILE SIZE

Create Smaller PDF Files 39
 Compress Existing PDF 40

12 SPLITTING A PDF

Determine the Size of Your PDF 41
 Split a PDF 41
 Split Options 42

13 EDITING AND ANNOTATING PDFS

Typewriter Tool 43
 Comments 44
 Comment Summary 46
 Other Mark Up Tools 46
 Active Markup 47
 Convert to Word, Excel, PowerPoint, or WordPerfect Document 47

Convert to Editable PDF 47

14 ELECTRONIC "IMAGE" STAMP SIGNATURE

Create The Stamp 49
 Flattening Added Text and/or Images/Signatures 51

15 BOOKMARKS AND LINKS

Creating Bookmarks..... 52
 Bookmark Customizations 52
 Creating Links to Bookmarks..... 53
 Creating Tables of Contents 54

16 WATERMARKS

Create a New Watermark 55

17 FLATTENING PDFS

Print to PDF 57
 Flatten File Button 57

18 REDACTION

Importance of Proper Redaction..... 58
 Save a Copy First..... 58
 Redaction Properties 58
 Text-Searchable PDF..... 58
 Redact Area 59
 Apply Redactions..... 59

19 SECURITY FOR PDF FILES

Password Security..... 61

20 ELIMINATING PDF HIDDEN CONTENT

Removing Metadata 63

21 FILLABLE FORMS

Drafting the Background Form..... 65
 Detect Form Fields..... 65
 Clean Up The Form 65

Add A Submit Button To Your Form 67

22 HEADERS, FOOTERS, & BATES NUMBERING

Headers and Footers..... 70

23 BATES NUMBERING

Select Files to Bates Number 73

Change How Bates Numbered Files are Saved 74

Add Bates Numbering..... 75

18 REDACTION

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

IMPORTANCE OF PROPER REDACTION

The importance of properly redacting a document cannot be understated. **Using the Redaction tools, as described in this chapter, is the only proper way to redact information.** Any other method may result in the disclosure of redacted information. One merely needs to read the news to see prominent attorneys in trouble for improperly redacting documents.

SAVE A COPY FIRST

Start by creating a copy of your PDF. **Redactions cannot be undone unless the PDF is closed without saving changes.**

REDACTION PROPERTIES

Set your Redaction properties first (color, text within redaction options, etc.). Open the desired PDF and select **Security → Redaction (group) → Redaction Properties**.

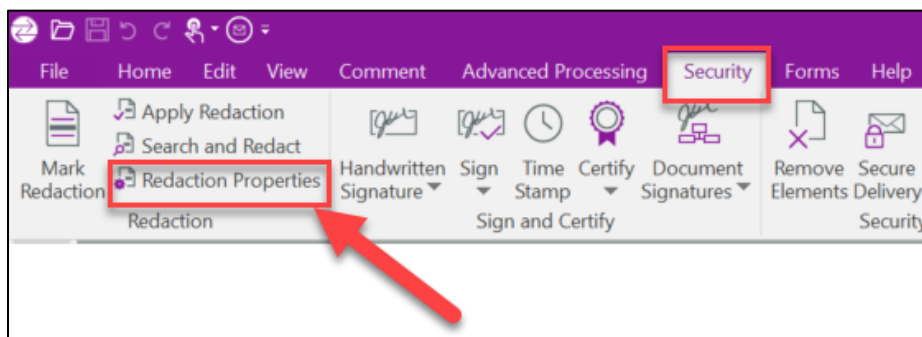


FIGURE 18-1

TEXT-SEARCHABLE PDF

Manually Redact

To redact text in a text-searchable PDF, simply click on the **Mark Redaction button** and select the desired text.

Search and Redact

To search for text and redact, select **Security** ➔ **Redaction** ➔ **Search and Redact**.

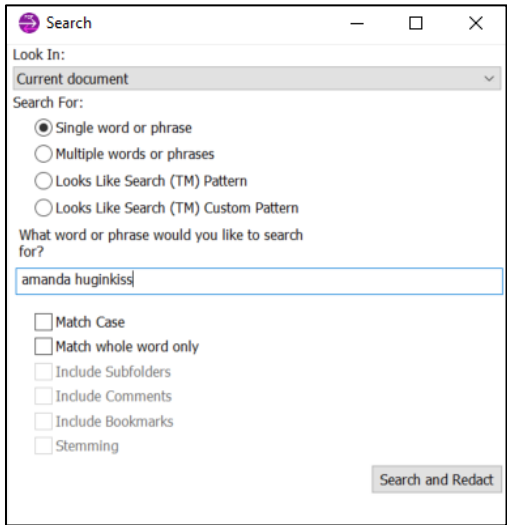


FIGURE 18-2

REDACT AREA

Mark your redactions next. Select **Security** ➔ **Redaction** ➔ **Mark Redaction**. To redact a region or area (images or non-text searchable PDF), using your mouse, simply click and drag over an area, as represented in the larger red rectangle below.

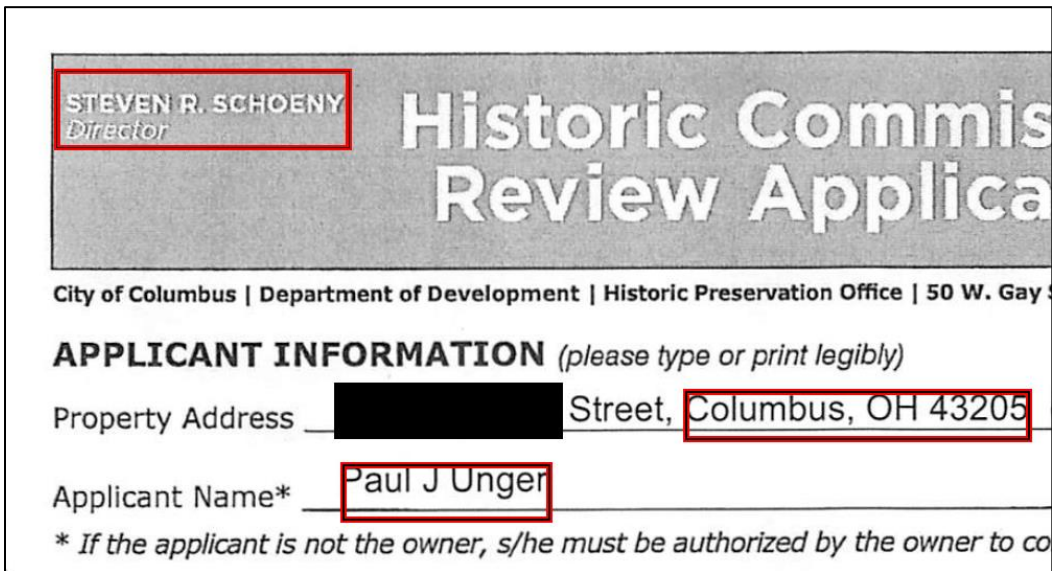


FIGURE 18-3

APPLY REDACTIONS

To apply the redactions, select **Security** ➔ **Redaction** ➔ **Apply Redaction**. The redactions cannot be undone unless you exit the document without saving your changes.

Once finished applying redactions, Power PDF will always ask you if you would like to scrub the metadata (they call it "additional document elements") from the document. Be careful with this function: if you do this, be sure

that you have the original unredacted version somewhere in case you must produce it to the court or other side by court order. You do not want to face an unnecessary adverse interference instruction for accidentally destroying metadata.

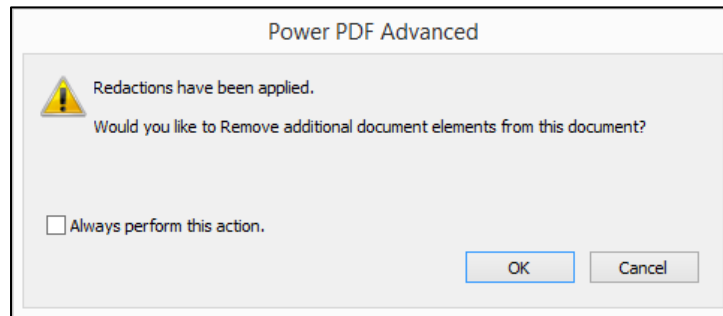


FIGURE 18-4



Invest. Inspire. Empower.

TRAINING



- On-demand training videos
- Software manuals
- Training webinars
- Custom training plans
- On-boarding plans
- Quarterly training reviews

TRAINING

Are you getting the most out of your technology investment? Turn your team into software experts and experience unprecedented gains in productivity and efficiency.

At Affinity, we believe that training should be woven into the fabric of a firm's culture—not a one-time event. Our team understands that implementing the right technology is only the first step toward an optimized practice. Realizing your firm's full potential requires an ongoing investment in training.

affinityconsulting.com/insight