

# Top Five Modern Features of PDF Software

(What PDF Should Do for You)

by John Heckman



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The PDF format has existed for many years, but its tipping point in the legal profession occurred in October 2000 when the *Wall Street Journal* exposed the risks of metadata (in Word especially). Almost immediately, converting documents to PDF format became a quick and dirty way of eliminating potentially damaging information from a Word document before sending it to opposing counsel (this method does not remove all metadata).

Since that time, the PDF format has become a de facto standard for exchanging documents. You can send somebody a PDF document and regardless of their word processor, printer, computer, etc. the top of page 4 will always be the top of page 4.

Since anybody can (and does) write PDF drivers, many software programs now include a “Print to PDF” function. And scores of cheap and even free PDF utilities exist. Law firms that make do with these basic PDF tools may not realize how much PDF has evolved.

More advanced PDF tools can improve your workflow, your ability to serve clients, and your bottom line. This white paper explores the top five features to look for when shopping for a more advanced PDF program.

## 1. Integration With Microsoft Office and Other Key Applications

Your PDF software should enable you to generate a PDF version of any document from the program that created it — most notably Microsoft Office. The same is true of database software. For example, it should enable you to output bills in PDF format.

It should also minimize the number of clicks required to accomplish a task. For example, it should automatically convert documents to PDF format when you attach them to an outgoing email message. Also, you should be able to set and forget document security so that every PDF file you create has the same level of se-

curity without any risk of human error. Being able to select from a menu of presets is an added bonus. For example, you may want higher levels of security on a document being sent to opposing counsel versus one sent to co-counsel or a client.

**More advanced PDF tools can improve your workflow, your ability to serve clients, and your bottom line.**

## 2. Closing/Deal Books

Basic PDF software enables you to reorder pages in a PDF file as well as add/remove pages. But using these “manual” tools to create a “Closing Book” or “Deal Book” can waste a lot of time.

What’s a deal book? It’s a deliverable that impresses and helps you retain clients. For example, a real estate lawyer can present a client with a PDF file containing all the documents for a house purchase along with a hyperlinked table of contents and cover page. A litigator can provide all deposition and court transcripts or all court filings. Etc.

To create deal books with a minimum of effort, look for PDF software with more powerful organization features. You should be able to add any type of document to the organizer without having to first convert it to PDF. The software should also automatically create a hyperlinked table of contents, headers and footers, title page, and other niceties that lend the deal book a professional appearance. And of course it should output a PDF file that anyone can open.

Importantly, if you add new documents, the software should be able to adjust everything, including the table of contents, automatically. This way, you can provide your clients with interim deal books during the course of a case or transaction.



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### 3. Litigation-Related Tools

With about half of the legal profession handling litigation matters, it's likely that someone in your firm needs PDF software with litigation-oriented features. For example:

*Bates Numbering:* Third-party utilities exist for applying Bates stamps to PDF files, but buying these utilities is unnecessary. This functionality should now be built into your core PDF software. It should offer sophisticated numbering options and shrink the existing PDF page slightly by a definable amount so that the Bates Numbers do not overlap any existing text.

**What's a deal book?  
It's a deliverable that impresses  
and helps you retain clients.**

*File Splitting:* I have seen clients with individual PDF files of 150-300 MB containing up to 5,000 pages. Many courts and email programs limit the size of file they will accept (very often 2 MB). Thus, to send or upload a large file it needs to be split into smaller pieces. You should be able to split by size or by number of pages (to keep major sections of a document intact, for example).

*Redaction:* Discovery documents often contain privileged material. Therefore, the PDF software you select should have the ability to redact a portion of a document or the entire document.

*Searchable Scans:* When you scan a document into PDF, it's not immediately searchable. While some PDF software can convert scanned text into searchable text, if you need to scan a sizable number of documents, look for a product with more robust OCR technology (perhaps server-based) that can handle batches of scanned documents.

### 4. Forms & Automation

Many courts and other public and private entities offer fillable PDF forms. But many

don't. And what about your own forms? Look for PDF software that can transform electronic or paper forms into a fillable PDF form.

One obvious use is for client intake — the client or someone on your staff can fill in the PDF form directly rather than handwriting answers and then typing them into a word processing form. Also, some PDF software can even move the information from the form into your practice management system.

Another feature to look for that works well in conjunction with forms is digital signature technology. A digital signature is not simply an inserted graphic, but a computer generated code (or "hash") certifying that the document is genuine and has not been modified. Thus, a true digital signature guarantees the authenticity of a document.

### 5. Integration With Your Document Management System

Many law firms use document management systems (DMS) such as Interoven, NetDocuments, Open Text, TRI, and WORLDOX. If you're among these firms, it's an absolute must to find PDF software that integrates with these systems without requiring special connectors or plugins — or any additional money.

**Look for PDF software that  
can transform electronic or paper  
forms into a fillable PDF form.**

Regarding functionality, you should be able to right-click on any document within the DMS and convert it to PDF as a new document, a new version, an attachment to an existing document, etc. Similarly, when you create PDF files, you should be able to save them into your DMS by client/matter from within your PDF software with one click — including the insertion of information such as Doc ID, author, and version in the headers and footers. The



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same functionality should exist when you combine several documents into a closing book as discussed above — one click and into your DMS it goes.

### Conclusion

Being able to open and create PDF files is

no longer enough. Modern PDF software with functions designed for law firms can boost your productivity by eliminating non-billable (and unenjoyable) chores, thus enabling you to spend more time on generating work product that will please your clients.

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*John Heckman of Heckman Consulting ([www.heckmanco.com](http://www.heckmanco.com)), has assisted law firms with technology issues for over 25 years. John is a Certified Consultant and Trainer for Amicus Attorney and other software applications. He is widely published and authors the legal technology blog, Does It Compute ([www.doesitcompute.typepad.com](http://www.doesitcompute.typepad.com)).*



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