



**Affinity**  
INSIGHT

# **ADOBE ACROBAT** for LEGAL PROFESSIONALS

Covering Acrobat for Windows  
Versions 11 & DC



# ADOBE ACROBAT

## FOR LEGAL PROFESSIONALS

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The materials in this book were written using Adobe Acrobat Pro DC and all steps and instructions were tested prior to the publication date. As Adobe continuously updates Acrobat DC, your software experience may vary slightly from what is seen in this manual.

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Version 2.08



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## MEET OUR TEAM OF ADOBE ACROBAT EXPERTS

Meet our team of Acrobat 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 Adobe Acrobat. 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 Acrobat 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.



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# 21 REDACTION

Can't find it? Something missing? Instructions not clear? Email [manuals@affinityconsulting.com](mailto: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.

## REDACTION STEPS

### Step 1: Save a Copy First

**Redactions cannot be undone unless the PDF is closed without saving changes.** Therefore, you want to start by saving a copy of your PDF. Keep the original intact and redact the information from the copy.

### Step 2: Open the Redaction Toolbar

To begin redacting, the Redaction Toolbar must be opened.

- In Acrobat XI Professional, click on **Tools button** ➔ **Protection**.
- In Acrobat DC Professional, click on **Tools** ➔ **Protect & Standardize group** ➔ **Redact**.

### Set 3: Set the Redaction Properties

To change the redaction to any color other than black or use overlay text, you need to change the Redaction Properties. In Acrobat XI Professional, click on the **Properties button**. In Acrobat DC Professional, click on dropdown arrow next to **Redact Text & Images** and select **Properties**. Once redaction properties are set, the PDF is ready for redaction.

### Step 4: Mark for Redaction

Once the properties are set, mark the information to be redacted by manually selected the information, searching for the information, or redacting whole pages.

#### Manually Redact Text and Images

To manually locate and mark text or images to be redacted, in Acrobat XI Professional:

1. Click on the **Mark for Redaction button**.
2. Select the desired text. Continue to select text until all redactions have been marked.
3. Click **Apply Redactions**.

In Acrobat DC Professional:

1. Click on the **Redact Text & Images button**.

2. Select the text/image to be redacted.
3. Continue to select text and images until all information to be redacted has been marked.

### Search and Redact

The Search and Redact function will not catch misspellings or text not explicitly searched for. When using the Search and Redact function, **it is critical that one review the PDF to ensure that all information has been properly selected and marked for redaction.** To search for text and mark it for redaction:

1. In Acrobat XI Professional, click **Search & Remove Text**. In Acrobat DC Professional, click on the **Redact Text & Images dropdown arrow** ➔ **Find Text & Redact**.
2. Perform a search for the desired text, phrase or pattern.

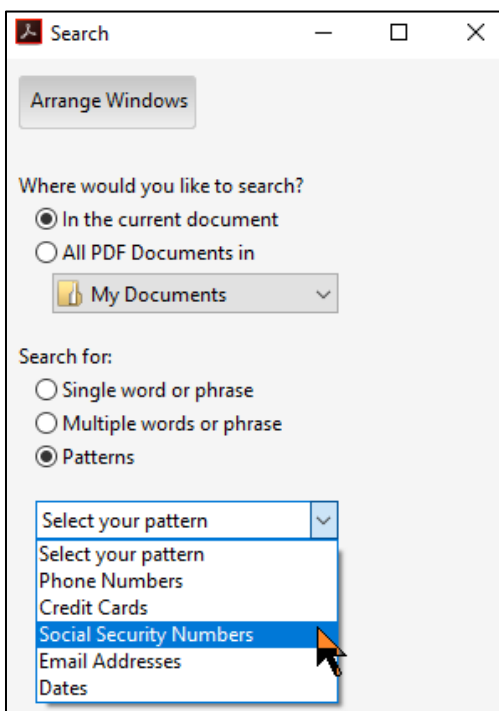


FIGURE 21-1

3. Select the results you would like to mark by checking the boxes to the left of the result list.
4. Then select **Mark for Redaction**.

### Redact Whole Pages

In Acrobat DC Professional, select **Redact Text & Images dropdown arrow** ➔ **Redact Pages**.

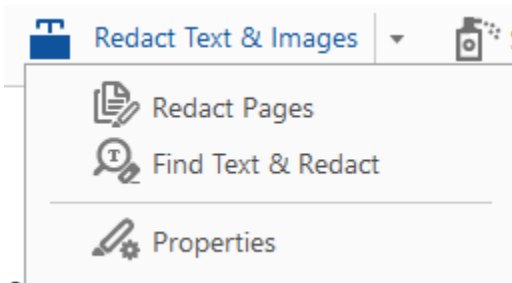


FIGURE 21-2

## Step 5: Apply Redactions

Once the redactions are marked, click on the **Apply button** to apply the redactions. Once redacted, you will not be able to undo the redaction (unless you close the PDF without saving). Be sure to save the redacted PDF. If you do not apply redactions then any information marked for redaction in Step 4 remains easily readable. **Do not skip this step!**

## USING COMMENTS AND REDACTION SUMMARY

Every redaction generates a comment. However, the comment does not include the redacted text by default. To change this setting, go to **Edit** → **Preferences** → **Comments** and check **Copy selected text into Highlight, Strikethrough, and Underline comment pop-ups**.

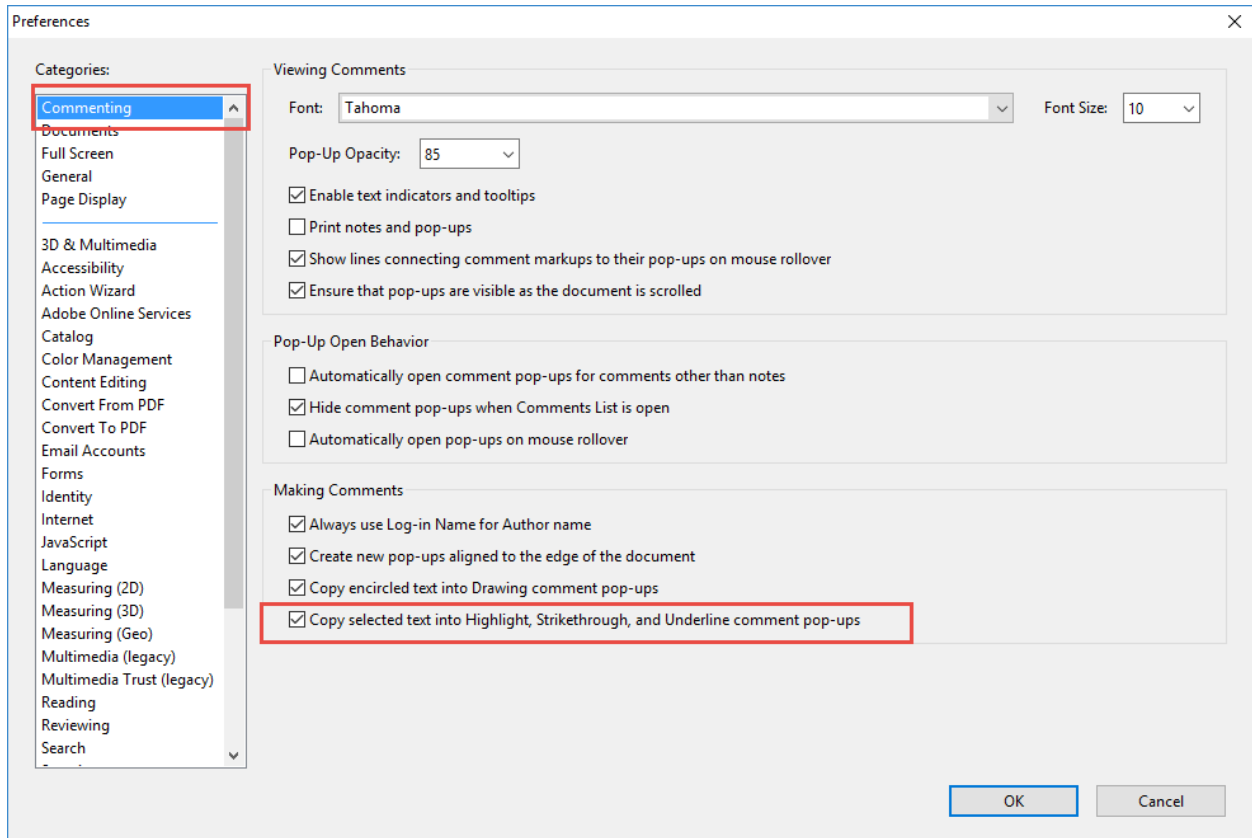


FIGURE 21-3

You can then create a summary of all the redacted text by creating a comment summary.

To create a privilege log across multiple documents, download the free Action "Create Comment Summary" for Acrobat XI from:

[https://acrobatusers.com/assets/uploads/actions/Create\\_Comment\\_Summary.sequ](https://acrobatusers.com/assets/uploads/actions/Create_Comment_Summary.sequ)

This action will create a spreadsheet of all comments from multiple documents. Note: The generated spreadsheet will not include the redaction codes PDF Encryption and Security.



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