



FOXIT PHANTOMPDF

FOR LEGAL PROFESSIONALS

Versions 10, 11, & 12

Foxit PDF Editor

FOR LEGAL PROFESSIONALS

PERSONAL LICENSE

© 2023 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.

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

The materials in this book were written using Foxit PDF Editor 12 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 5.01



LEAVE THE TRAINING TO US.

- Comprehensive digital courses
- Affordable membership plans
- On-demand training videos
- Live training sessions
- “Ask the Expert” sessions
- Customizable training plans

Affinity Insight offers insightful training programs created by legal professionals for legal professionals. Our digital courses and training membership plans give you access to some of Affinity’s most dynamic law firm management and legal technology trainers—not just for a day or a week, but all year long. Join live training sessions with your peers or learn at your own pace with bite-sized, on-demand training modules. Design a custom training plan for yourself or everyone in your firm.

Learn more at <https://affinityinsight.com>





MEET OUR TEAM OF PDF EDITOR EXPERTS

Meet our team of PDF Editor 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.



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.





FOXIT PDF EDITOR FOR LEGAL PROFESSIONALS

TABLE OF CONTENTS

CHAPTER 1 INTRODUCTION

PDF File Types.....	1
PDF Editor Versions.....	1

CHAPTER 2 MICROSOFT INTEGRATION

Word.....	3
Outlook.....	4
Excel And PowerPoint.....	5
File Explorer.....	6

CHAPTER 3 INTERFACE

Main Window.....	7
Main Functionality of Each Section.....	7
Quick Access Toolbar Customization.....	8

CHAPTER 4 CREATING PDFS

What Can Be Converted to A PDF.....	10
Creating PDFs from Microsoft Office.....	10
Creating PDFs from PDF Editor.....	16
Creating PDFs from Scanners.....	17

CHAPTER 5 VIEWING PDFS

Read Mode.....	18
Read Out Loud.....	18
Tabs.....	19

CHAPTER 6 CREATING A TEXT-SEARCHABLE PDF

Convert an Image-Only PDF to a Text-Searchable PDF.....	20
Batch Process to Text Searchable PDFs.....	20

CHAPTER 7 COPYING TEXT

PDF Must Be Searchable in Order to Copy Text.....	24
Copy Text from a PDF and Insert into Word Processor.....	24
Convert PDF to Word Processor Document.....	25

CHAPTER 8 EXTRACTING PAGES

Extract Button.....26
 Thumbnail Method 28

CHAPTER 9 COMBINING PDFS

Thumbnail View 30
 Insert Button31
 Combine Files Button32
 File Menu35
 File Explorer36

CHAPTER 10 PDF PORTFOLIOS

Create a PDF Portfolio37

CHAPTER 11 REDUCING PDF FILE SIZE

Create Smaller PDF Files.....39
 Compress Existing PDF..... 41

CHAPTER 12 SPLITTING A PDF

Determine the Size of Your PDF 42
 Split a PDF 43
 Split Options..... 43

CHAPTER 13 EDITING AND ANNOTATING PDFS

Typewriter Tool 44
 Comments..... 45
 Comment Summary 47
 Other Mark Up Tools 48
 Convert to Word, Excel, or PowerPoint..... 49

CHAPTER 14 ELECTRONIC "IMAGE" STAMP SIGNATURE

Create The Stamp..... 50

CHAPTER 15 BOOKMARKS AND LINKS

Creating Bookmarks.....52
 Bookmark Customizations52
 Creating Tables of contents.....53

CHAPTER 16 WATERMARKS

Create a New Watermark.....	55
-----------------------------	----

CHAPTER 17 FLATTENING PDFS

Print to PDF.....	57
Flatten File Button.....	57

CHAPTER 18 REDACTION

Importance of Proper Redaction.....	58
Save a Copy First.....	58
Text-Searchable PDF: Search and Redact.....	58
Redact Area.....	60
Redaction Properties.....	61
Apply Redactions.....	61
AI Powered Redaction.....	62

CHAPTER 19 SECURITY FOR PDF FILES

Password Security.....	63
------------------------	----

CHAPTER 20 ELIMINATING PDF HIDDEN CONTENT

CHAPTER 21 FILLABLE FORMS

Draft the Background Form.....	66
Detect Form Fields.....	66
Clean Up the Form.....	67
Add A Submit Button to Your Form.....	68

CHAPTER 22 HEADERS, FOOTERS, & BATES NUMBERING

Headers and Footers.....	71
Bates Numbering.....	73

CHAPTER 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.**

Text-Searchable PDF: Search and Redact

To search for text and redact, select **Protect ribbon** → **Mark for Redaction** → **Search and Redact**.

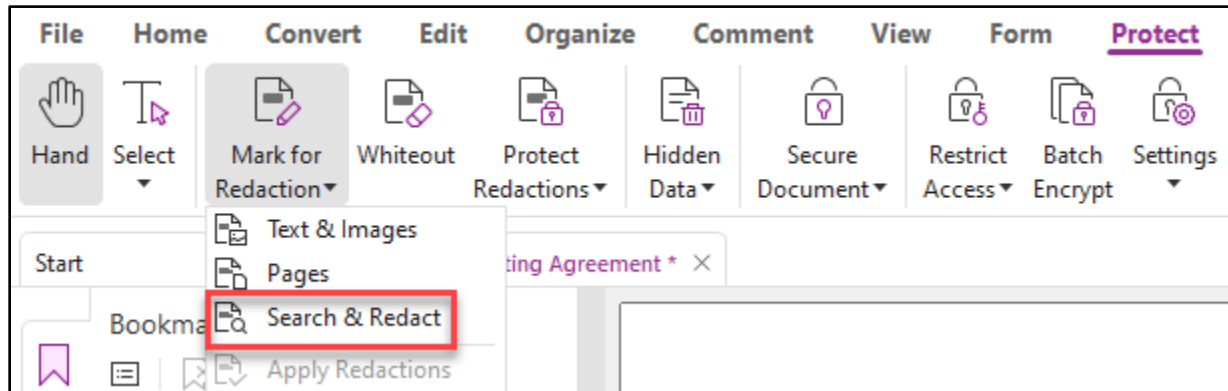
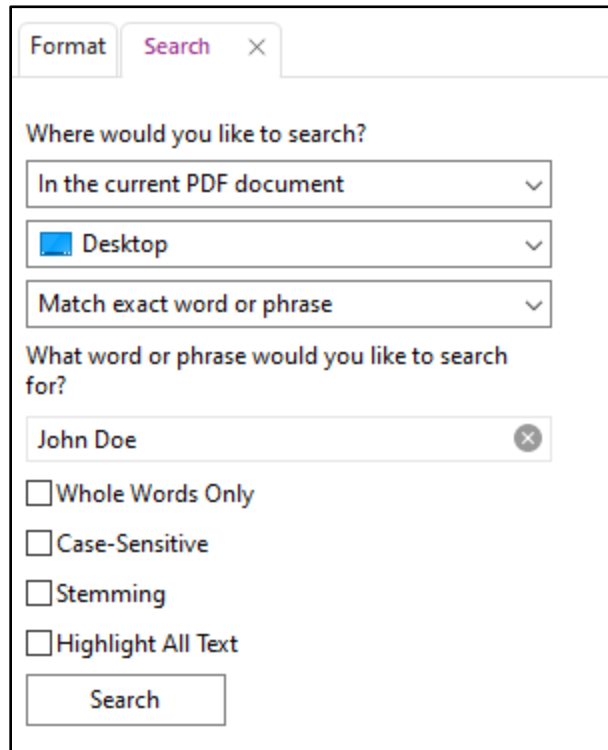


FIGURE 18-1

Set your search terms in the **Search pane**.



Format Search ×

Where would you like to search?

In the current PDF document

Desktop

Match exact word or phrase

What word or phrase would you like to search for?

John Doe

Whole Words Only

Case-Sensitive

Stemming

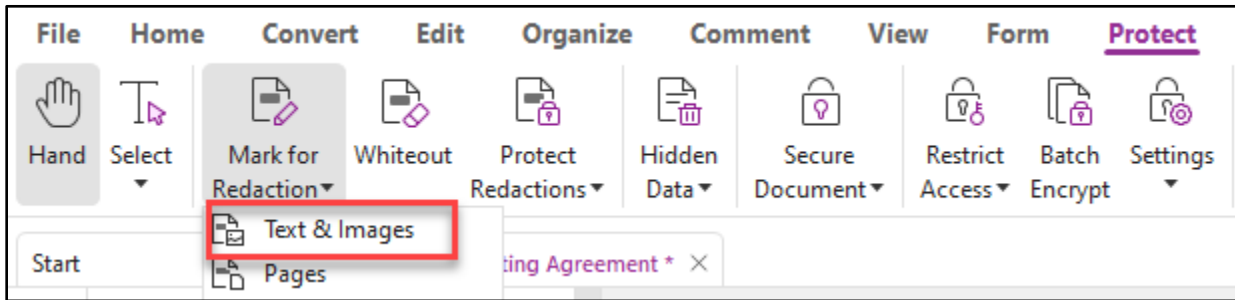
Highlight All Text

Search

FIGURE 18-2

Redact Area

1. Mark your redactions next. Select **Protect ribbon** → **Mark for Redaction** → **Text & Images**.



2. To redact a region or area, using your mouse, simply click and drag over an area, as represented in the larger red rectangle below.

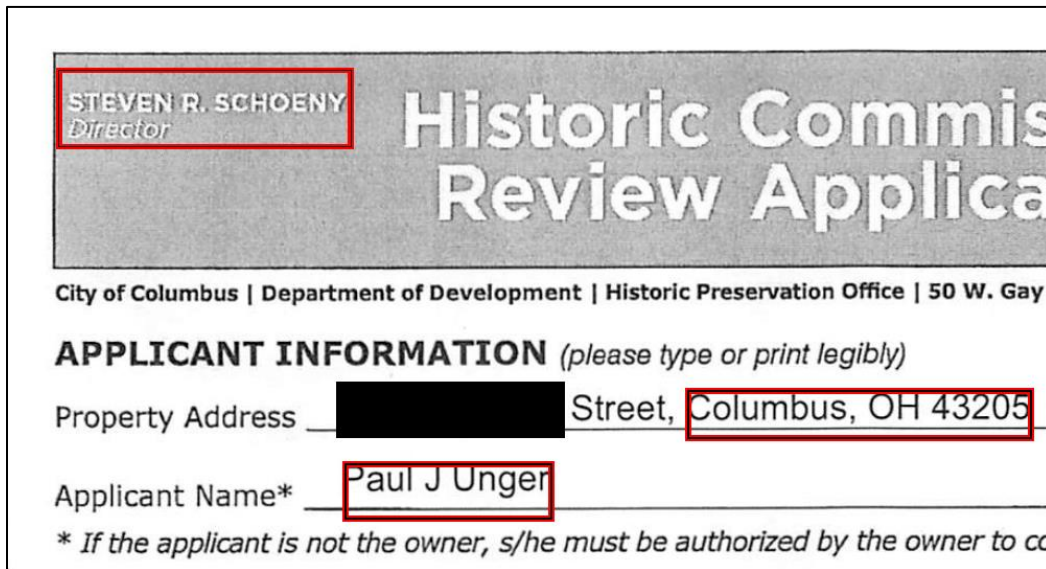


FIGURE 18-3

Redaction Properties

To change the redaction properties, right click in the redacted area and click on **Properties**. You can change the redacted area fill color or add overlay text.

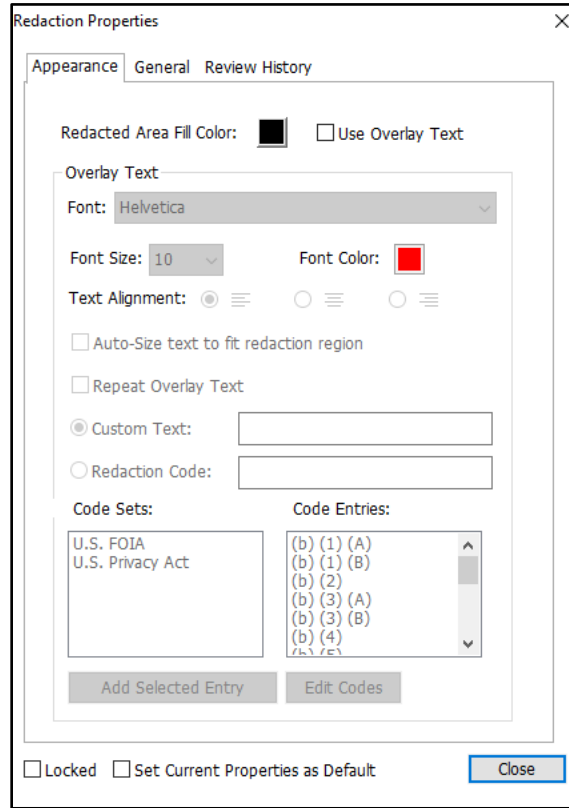


FIGURE 18-4

Apply Redactions

To apply the redactions, **Protect ribbon** → **Mark for Redaction** → **Apply Redactions**. The redactions cannot be undone unless you exit the document without saving your changes.

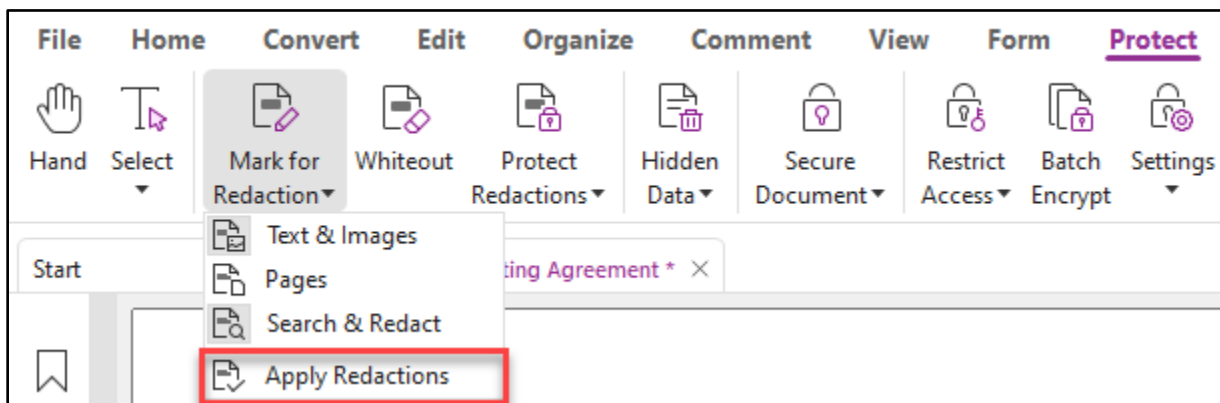
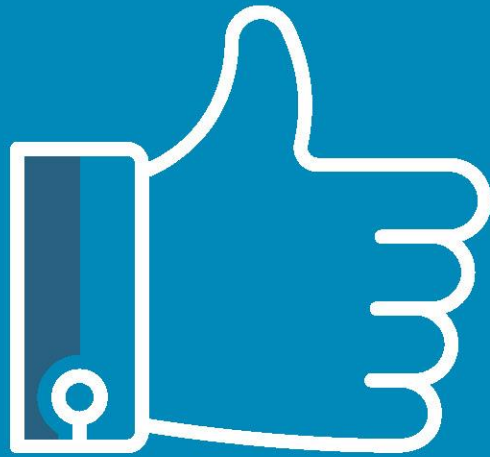


FIGURE 18-5

AI Powered Redaction

Foxit Smart Redact, an optional add-in for PDF Editor, makes it faster to redact documents using the power of AI. You can learn more at <https://www.foxit.com/smart-redact/>.



LEAVE THE TRAINING TO US.

- Comprehensive digital courses
- Affordable membership plans
- On-demand training videos
- Live training sessions
- “Ask the Expert” sessions
- Customizable training plans

Affinity Insight offers insightful training programs created by legal professionals for legal professionals. Our digital courses and training membership plans give you access to some of Affinity’s most dynamic law firm management and legal technology trainers—not just for a day or a week, but all year long. Join live training sessions with your peers or learn at your own pace with bite-sized, on-demand training modules. Design a custom training plan for yourself or everyone in your firm.

Learn more at <https://affinityinsight.com>

