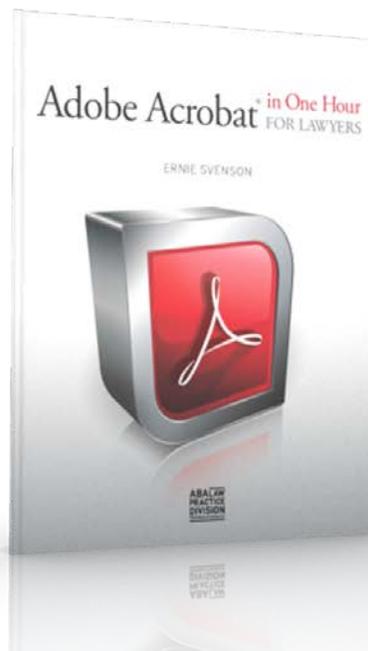


Workflow Checklists

A Companion Guide to: *Acrobat in One Hour for Lawyers*
by attorney Ernie Svenson



For more information about this book [click here](#).

And for ongoing instruction on how best to use
PDFs in the practice of law visit:
PaperlessChase.com.

Workflow Checklist - Acrobat in One Hour for Lawyers

These workflow checklists are supplements to the ones in the book [Acrobat in One Hour for Lawyers](#). The checklist refers to the specific sections in the book where each workflow task is covered.

LITIGATION WORKFLOWS

1. Documents received from client for production

If Documents Are In Paper Form

- Arrange into chronological order, removing duplicates
- Scan in as one PDF (you will break up docs later)
- OCR documents (as described in Section 11)
 - In earlier versions of Acrobat it was necessary to OCR before Bates-stamping; this is still a good practice
- Bates-label docs (as described in Section 14)
 - Bates-label in left bottom corner w/ receipt info (e.g. "Rec'd from ACME on 01/12/12")
 - Bates-number in right bottom w/ prod info (e.g. "DEF-01Prod - 000001")
- Bookmark (Section 8) name 1st page of each document with what you want file name to be.
 - (e.g. "2012-02-15 Letter from T. Rex to T. Pain")
 - (e.g. "2011-05-21 10.15 am E-mail from T. Pain to T. Rex")
 - (e.g. "CONFIDENTIAL 2010-04-19 Letter from C. Darrow to B. Client")
- Ensure bookmarks all complete, without any exact duplicate names.
- Split document by top-level bookmarks (Section 8.8)
- Segregate CONFIDENTIAL documents and create privilege log
- Combine documents to be produced into one PDF (Section 5.5)
- Upload to [Adobe SendNow](#) (Not covered in Book)

If Documents are in PDF Form

Same process as above, beginning with OCR step

Workflow Checklist - Acrobat in One Hour for Lawyers

Creating a Privilege Log

- Redact the sections of PDF pages that are privileged (Section 15.1); often that won't be the whole page.
- Create bookmarks (Section 8.2) that describe each document and reason for privilege claim
- Use the [Evermap AutoBookmark](#) plug-in (Not covered in Book) to create a Table of Contents that automatically links to each PDF document; the bookmark names will be the table of contents and will smartly describe the privilege claims.

2. Documents you're preparing to e-file

E-filing usually involves grouping related PDFs together (with exhibits)

Staging PDF documents

- Print all documents to PDF format (e.g. Motion, Memo in Support, Proposed Order, Hearing Date Notice, and Exhibits if they're not already in PDF format.
- If using Microsoft Word, create styles so that Headings in Memo in Support convert to Bookmarks automatically (Section 8.11).
- Or create bookmarks for Memo in Support manually (Section 9.2) and set Initial View to open with bookmarks panel open (Section 8.9).
- Place PDF documents in folder on your desktop
- Use signature stamp like one described in Section 12 to sign where needed.
- Flatten signature as described in Section 12.3, or using an Action (Not covered in Book).
- Check date of certificates of service and anywhere else current date is needed; if date is wrong fix it using the Edit Text tool (Section 10).
- Place Exhibit stickers on Exhibits using Custom Exhibit Stamp (Section 12), or just apply Bates-stamps using Bates-numbering tool (Section 14)
- Flatten Exhibit stamps as described in Section 12.5, or using an Action (Not covered in Book).
- Convert all PDFs to PDF/A format if necessary using instructions in Section 19.2.

3. Documents you receive from other parties who've e-filed

When you receive electronically filed documents you will probably have several documents to download, but you will want them to all be bundled together. And you'll want the Memorandum in Support (or any long document with lots of headings and sub-headings) to be bookmarked.

- Create bookmarks for Memo in Support manually (Section 8.2) and set Initial View to open with bookmarks panel open (Section 8.9).
- Combine all the documents into one PDF (Section 5.5)
- Rename bookmarks from default names given to individual files (which is what the bookmark names became after you combined the PDFs), using instructions in Section 8.5.
- Set Initial View to open with bookmarks panel open (Section 8.9).

4. Responding to interrogatories

When you receive interrogatories or any kind of discovery, the best thing to do is respond with a document that has the request listed and then your type your response. That way you'll always be able to see what you were responding to (which is helpful when you face a motion to compel). Presumably, your opponent hasn't sent you a Word file with discovery requests; they probably sent you paper, or a PDF.

- If requests came in as paper, scan them and OCR them (Section 11)
- Convert the resulting PDF to Word (Section 5.1)
- Copy and paste any needed text into your response document as needed.

5. Creating a PDF Trial Notebook

Typically, a Trial Notebook will have all relevant documents that might be important in the case. In paper form, the Trial Notebook is a ring binder with tabs for major sections of documents, something like this:

1. Pleadings, in chronological order, except for discovery documents, which are grouped by request (e.g. Interrogatory #1, with response, and any rulings related to motions to compel).
2. Key rulings on motions
3. Pretrial Order
4. Exhibit List
5. Witness List
6. Exhibits, grouped by parties (although if the case anything more than a small case, the exhibits would be not be part of a Trial Notebook).

The workflow for creating a *PDF* Trial Notebook would be:

- Combine discovery documents together into PDFs that contain each (1) request (2) response, and (3) rulings on discovery if motions to compel were filed (see Section 5.5)
- Make sure all files have names that will cause them to sort chronologically (e.g. "2001-04-29 [name of pleading or ruling]")
- Combine all pleadings, per Section 5.5 (bookmarks will automatically be created to match the file name of combined document).
- Use [Evermap's AutoBookmark plug-in](#) (Not Covered in Book) to create a Table of Contents that hyperlinks to each section in the Trial Notebook .
- Highlight and create sticky notes in areas that you want to remember to focus on during the trial (Sections 9.1 and 9.5).
- If you are including Exhibits, you can create bookmarks to set up the order you want to introduce the Exhibits in (remember that you can have more than one bookmark point to the same page, and that bookmarks need not be in the same order as the pages in the PDF).
- Set Initial View to open with bookmarks panel open (Section 8.9).

TRANSACTIONAL WORKFLOWS

1. Creating a closing Binder

Transactional lawyers might want the PDF equivalent of a “deal book” which can be best accomplished with a PDF Portfolio which was not covered in this book, but is not that hard to figure out. Other things you might want to do are:

- Stamp final documents with any of the standard business stamps included in Acrobat, and described in Section 12 (e.g. FINAL, CONFIDENTIAL, FOR PUBLIC RELEASE, NOT FOR PUBLIC RELEASE)
- Flatten stamps into documents so they can't be removed or printed out without the stamps (Section 12.5).
- Add final stamped deal docs and exhibits (stamped with Exhibit stickers, if needed, as described in Section 12.2)
- Add copies of the final word processing files used to generate the deal documents
- Archive e-mails related to deal discussions to PDF (Section 5.11) - Windows only, and only for Microsoft Outlook and Lotus Notes e-mails.