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Legal Acrobatics

A Review of Adobe Acrobat Professional 7.0

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If you haven't already seen a couple reviews of Acrobat 7.0, you must not be reading much legal tech trade literature! I've caught at least half a dozen already. Adobe Systems has accompanied the release of their latest version with quite a media blitz, at least in the legal sector. And for good reason. The Acrobat product family encompasses a host of features highly useful for legal professionals.

Until recently, my own interactions with Acrobat were limited to the free Reader. Like many Internet users today, I've opened thousands of portable document format (PDF) files, including "fillable PDFs" for tax forms and other purposes. I've used non-Adobe products to produce simple PDFs from Microsoft Word and PowerPoint files.

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Now that I've begun to spend time with Acrobat Professional, I've grown interested in the role it can play as a "knowledge tool" for legal professionals. But let me first review some basics and mention highlights of the cool stuff found in version 7.0.

To Review

Besides being high fidelity documents that can reliably be opened by anyone, anywhere, using almost any kind of computer, Acrobat files can feature:

- Compression;
- Security (passwords, encryption, digital signatures, restrictions on copying and printing);
- Tools for review and feedback (highlighting, sticky notes, strikethrough ...);
- Combinations of text, spreadsheets, diagrams, charts, and other files;
- Headers, footers, watermarks; and
- Data exchange via barcodes or with Web services via XML.

Besides empowering you to create and consume such documents, Acrobat software supports:

- Search (both within and across files);
- Navigation (through bookmarks and hyperlinks);

- Collaboration and workflow (through review and comment tools); and
- Archiving (of file collections, Outlook folders, or even entire Web sites).

Acrobat comes in four main flavors:

- Reader (free, mostly read-only — 500 million copies distributed worldwide);
- Elements, introduced in version 6.0 (simple PDF creation and distribution, with drag-and-drop and batch processing; inexpensively volume-licensed for enterprise deployment);
- Standard (easier creation, review & comment); and
- Professional (full-featured).

Standard and Professional both allow users to consolidate and compare comments, but Professional now lets you extend commenting capabilities *even to users of the free Reader version*. Reviewers can click a button to return comments to the author via e-mail. Comments can be gathered and imported back into Word. You can even have a team work simultaneously on a form over the Web.

LEGAL USES

Being able to "print" richly formatted

documents to universally readable electronic files that faithfully preserve their appearance is powerful. We tend to take that power for granted, forgetting the technical wizardry, corporate exertion, and consumer adoption involved.

In law, PDF has become not only the de facto universal exchange format for fixed format documents, but the lingua franca of electronic filing. Collegial and client interaction are advanced by documents that provide easy means of markup and commentary. It is increasingly possible to embed substantive legal knowledge in interactive forms that communicate with online databases and services.

Adobe's product literature, associated collateral, and online help system are of impressively high quality. Thus I was disappointed to see that the "legal white paper" distributed on the "Adobe Acrobat 7.0 for Legal professionals" CD refers to Acrobat 5, and cites court statistics from 1996. (Note: Adobe has since produced an updated white paper focused on Acrobat 7.0 for the legal industry, which it is making available on its Web site: www.adobe.com/legal.)

INTELLIGENT DOCUMENTS

I've worked in law practice technology for over 20 years, with a strong focus on document automation and artificial intelligence. Document assembly tools like CAPS, HotDocs, GhostFill, and DealBuilder have been my software platforms of choice. The vendors of these and related products (SmartWords, SpeedLegal, Thinkdocs, Qshift, and many, many others) have often described themselves as supplying tools for building "intelligent documents."

Now Adobe has begun to promote

what it calls the "Intelligent Document Platform." What does that mean? It also talks about "ePaper" and document "assembly."

So far as I can tell, when Adobe talks about "assembling" documents, it's referring to the manual process of combining multiple source documents into a single output PDF. It's not referring to the rules-based construction of custom documents from clauses and other components that characterize the products mentioned above. After all, PDF forms by definition have been essentially static. Fixed fields could be defined for data entry, but the forms themselves didn't change. You couldn't grow a region interactively. (As we'll see, that is changing.)

One aspect of "intelligence" is the business logic that can be embedded in PDF files, such as calculations, routing instructions, error checking, and data validation. JavaScript can be used to achieve interesting behavior, and forms can be governed by XML schema.

Another variety of form "smarts" can be accomplished through the Acrobat policy server — one that provides rights management for forms *after* they have been distributed. (Sorry, in 10 minutes you will no longer be permitted to read this article.)

Besides the Acrobat desktop products, the Intelligent Document Platform includes the Adobe Lifecycle software, a new generation of server products and design tools built on the common Java 2 Platform, Enterprise Edition (J2EE) architecture. Lifecycle Designer is included with the Windows version of Professional.

Designer lets you create dynamic interactive forms that users can open and fill online. Users can enter data directly into *expandable* fields, add

or remove sections, and return the form data electronically. Designers can specify repeating elements that regenerate forms with space for new data. Content that can't be appropriately accommodated in one location can be handled through overflow mechanisms. These kinds of adjustable layout will blur the distinction between 'static form' automation and classical document assembly. The borders between forms and word processing documents are getting more porous.

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Adobe recently agreed to acquire Macromedia, maker of Flash, Dreamweaver, and ColdFusion. By marrying its Acrobat products with these powerful tools for dynamic content, Adobe stands to challenge Microsoft itself for leadership in the interactive media world. Rich Internet applications drawing upon these new synergies should be forthcoming.

BOTTOM LINE

Acrobat is an elegant and versatile application for legal purposes. It supports dozens of distinct uses in law. Version 7.0 delivers significant innovation. Adobe is a company legal professionals will likely get much more familiar with. And from what I can tell, that's a good thing.



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