



Harnessing the Power of PDFs: Effective Document Management in Mediation and Other ADR Processes

***A Guide for Appellate Division, Second Department
Mandatory Civil Appeals Mediation Program (MCAMP)
Special Masters and Dispute Resolution Professionals***

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Mediation ● *Arbitration*

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INTRODUCTION

This guide and accompanying video continuing legal education presentation (coming soon to <https://www.youtube.com/WeinreblawPLLC>) address information control and organization in mediating appeals and other matters involving voluminous documents, a common situation arising in New York State Case Electronic Filing (“NYSCEF”) system-based cases and many other alternative dispute resolution (“ADR”) matters. The purpose of the guide and video is simple and straightforward: to provide Appellate Division, Second Department Mandatory Civil Appeals Mediation Program (“MCAMP”) Special Masters and other civil dispute resolution professionals who handle complex matters involving voluminous documents with certain foundational technical skills to review, analyze, annotate, and search these documents efficiently and expeditiously, thereby enhancing their control and organization of case information and knowledge.

In the world of New York civil litigation (both state and federal) and ADR, Adobe Systems, Inc.’s (“Adobe”) Portable Document Format (“PDF”) is the digital/electronic document currency of choice. PDF’s rise to prominence began in the early 1990s with Adobe co-founder John Warnock’s vision of a universal document format that could retain its formatting regardless of the software, hardware, or operating system used to view it. This vision, initially known as the “Camelot Project,” was driven by the need to enable electronic communication and the transition from printed to digital information.

The first version of PDF was officially released in 1993, but its large file sizes and lack of external hyperlink support initially hindered its widespread adoption. However, with the release of a free Acrobat Reader and subsequent versions that incorporated features like external links, security features, and annotation capabilities—the latter being discussed below—the popularity of PDF files (commonly referred to as “PDFs”) soared.

By 1996, the IRS adopted PDF to distribute tax forms online, significantly contributing to the format’s widespread use, and in 2008, Adobe submitted the PDF specification to the [International Organization for Standardization](#) (“ISO”), solidifying its status as an open standard. The ISO’s acceptance of the specification allowed for broader compatibility and

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encouraged widespread adoption of the format across different platforms and software, thereby ensuring the continued evolution and use of PDFs.

Above and beyond its prominent reputation, PDF has remarkable versatility, stemming from the format's ability to faithfully preserve native/original document formatting, including text, images, and layout, across different technology platforms. PDFs that are opened on a computer running Microsoft Windows operating systems appear in near-identical fashion to those opened on a computer running Macintosh ("Mac") operating systems, and the same holds true for computers running other operating systems such as Linux and smartphones. The analogy of PDF to a national currency is thus particularly appropriate: just as a United States dollar in Florida is legal tender in New York, California, Illinois, and the rest of the Union, so too is PDF universally recognized as a format in both the real world and digital environments.

Beyond appearance, the standardization of PDF allows for secure sharing of information with features like password protection and encryption, making it ideal for sensitive documents like legal contracts and financial reports. PDFs can also incorporate interactive elements like hyperlinks and form fields, thereby enhancing user engagement and enabling functionalities like online forms and interactive presentations. From academic papers and e-books to legal documents and business reports, PDF continues to be an essential tool for sharing and preserving information in a reliable and accessible format. There is thus little doubt that like Microsoft's *.docx format associated with Microsoft Word, until someone invents a "better mousetrap," PDF and PDFs will remain permanent fixtures of cyberspace on account of their versatility.

While PDF is a proprietary format, Adobe does not have a monopoly over it such that a variety of PDF readers/viewers and editor programs have sprung up over the years other than (and some might say beyond) [Adobe Acrobat Pro](https://www.adobe.com/acrobat/acrobat-pro.html) (a/k/a Adobe Acrobat DC ("Document Cloud") Pro or "AADDCPro"). These include:

1. [Foxit PDF Editor](https://www.foxit.com/shopping/?tab=editor) (https://www.foxit.com/shopping/?tab=editor)
2. [SwifDoo PDF](https://www.swifdoo.com/pricing) (https://www.swifdoo.com/pricing)
3. [PDFgear](https://www.pdfgear.com/) (https://www.pdfgear.com/)

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Additional PDF software options—including beta/development programs available for use at your own risk—can be downloaded from https://www.neowin.net/news/tags/pdf_editor/ (last updated Feb. 25, 2025).

AADCPro and Foxit both utilize Software-as-a-Service (“SaaS”) monthly or annual subscription business models, whereas SwifDoo and PDFgear—with the latter currently being free of charge—are standalone, relatively inexpensive programs that do not require users to purchase recurring subscriptions.

While PDFgear, SwifDoo, and other similar programs in the budget/value tier of PDF editors are generally excellent and will meet the needs of most ADR professionals, in the world of complex cases involving voluminous documents, only AADCPro—having been developed by Adobe—offers the greatest range of information and control capabilities, notwithstanding that Foxit is catching up very quickly. I have therefore compiled and edited this guide—with some assistance from Google Gemini Advanced artificial intelligence models—using AADCPro as a default paradigm, although with some creativity and ingenuity, Sections I-III of the guide can easily be adapted for use with PDF editors other than AADCPro. (Section IV discusses cataloging/indexing search features supported by AADCPro and Foxit that are not supported by SwifDoo and PDFgear as of February 2025).

As for the general structure of the guide, it is organized progressively or sequentially such that Section I, entitled Combining/Merging PDFs, logically precedes Section II, entitled Highlighting and Annotating PDFs, which logically precedes the remaining Sections III and IV, entitled Internal and External Hyperlinking and Creating and Using a Catalog/Index for Proximity Searching in Adobe Acrobat Pro, respectively.

The guide is based upon my experience with a complex MCAMP medical malpractice appeal, *Barnes et al. v. Lee et al.*, Dkt. No. 2022-04483 (App. Div. 2d Dep’t Nov. 3, 2022) (available at <https://iapps.courts.state.ny.us/nyscef/DocumentList?docketId=hvt2GH6YHEEP4i9bGwc3aQ==&display=all&courtType=Appellate%20Division%20-%20202nd%20Dept&resultsPageNum=1>), which the parties settled and withdrew in late January 2025, prior to the occurrence of any pre-mediation conference or other significant

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interaction with counsel. Insofar as the *Barnes* appellate docket contains sixty-five entries, thirteen of which comprise the 4,000+ page Record on Appeal, it is an excellent, publicly-available (and thus non-confidential) practice resource for developing the skills discussed in the guide.

The guide is also an expansion upon an article, entitled The Powerful PDF, which I authored way back in December 2014 (!) for *New York County Lawyer*, a New York County Lawyers Association publication. While that article was written for litigators and thus not ADR-focused, the techniques discussed therein—some of which are updated in the guide—can easily be applied to ADR processes. As such, the article still has value as a resource and is available at <https://www.weinreblaw.com/resources-articles/> or by clicking on the following image:



Finally, insofar as the guide is based upon PDFs from *Barnes* that were already processed by the New York Unified Court System’s (“UCS”) Optical Character Recognition (“OCR”) workflow, I have not included detailed instructions in the guide pertaining to the OCR process. It goes without say that prior to using the guide, all relevant PDFs should already have been “OCRed” such that they are text-searchable. While it is unlikely that PDFs originating from an official court e-filing system such as the UCS’ NYSCEF

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system would need to be “OCRRed” again, should the need arise, a straightforward guide to executing the OCR process is available from Adobe Systems, Inc. at <https://experienceleague.adobe.com/en/docs/document-cloud-learn/acrobat-learning/getting-started/scan-and-ocr> (last updated Sept. 30, 2024).

Control and organization of case information are directly proportional to each other such that the more control one has over case information, the more one maintains organization of that information and vice versa. It is my hope that the four sections of the guide appearing below in which you are about to immerse will, please G-d, augment your control and organization of case information in mediations, arbitrations, and other ADR processes, thereby facilitating your success as a dispute resolution professional in both court-annexed and non-court-annexed/private ADR environments.

Should you have any questions, comments, or observations concerning the guide or even general PDF use in litigation or ADR, please feel free to contact me at 516-620-9716 or eweinreb@weinreblaw.com. And now, prepare to harness the power of PDFs in your ADR practice.

Respectfully yours,

Elan E. Weinreb, Esq.

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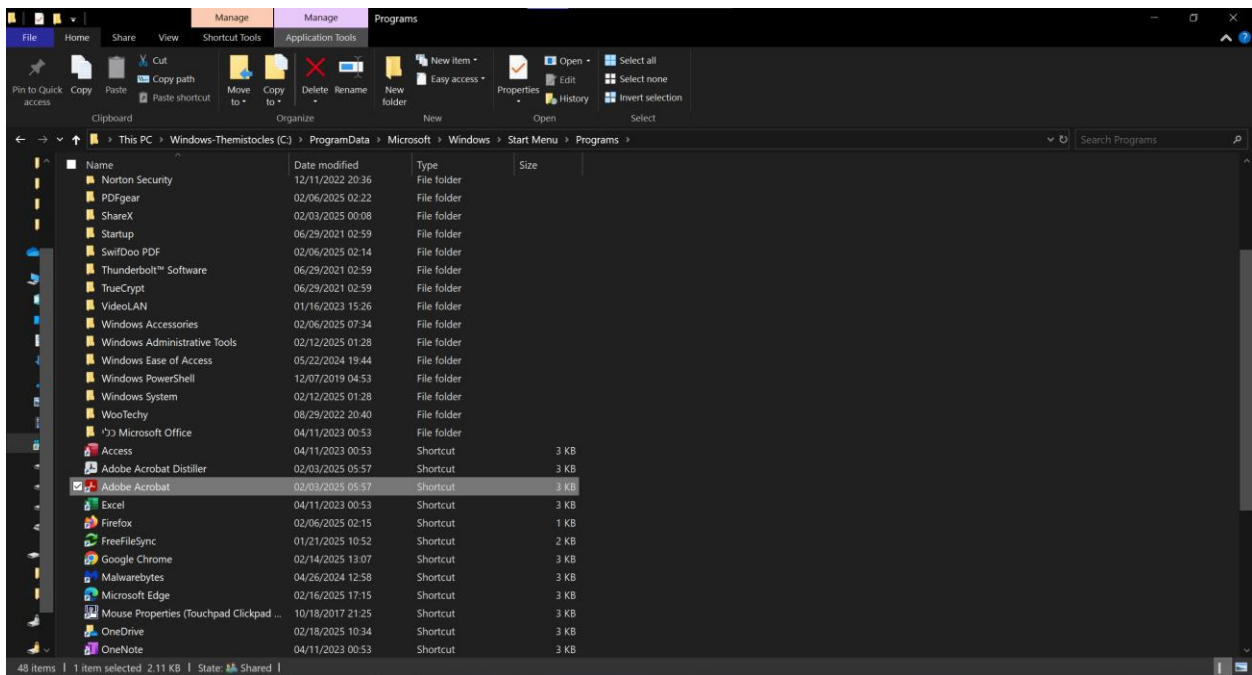
SECTION I: COMBINING/MERGING PDFs

Gemini Advanced Prompt: Please provide a heavily-detailed step-by-step guide for combining files into one PDF file and then reducing the size of that file using Adobe Acrobat DC Pro.

Part 1: Combining Files into One PDF

1. Launch Acrobat DC Pro:

- Locate the Acrobat DC Pro icon on your computer (Start Menu, desktop shortcut, Applications folder).
- Double-click the icon to launch the application.

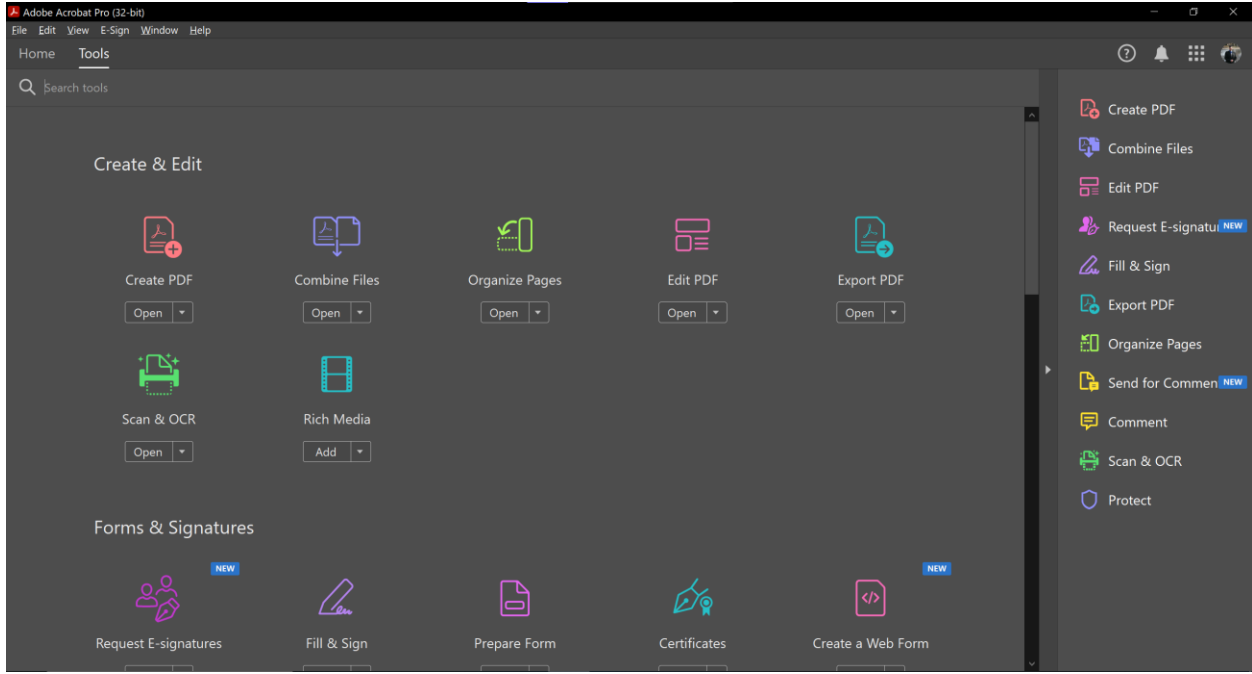


2. Access the Combine Files Tool:

- **Tools Center:** Click on the "Tools" tab in the menu bar at the top of the Acrobat window. This will open the Tools center.
- **Combine Files:** Locate the "Combine Files" tool. It might be directly visible, or you might need to scroll or expand a category to find it.

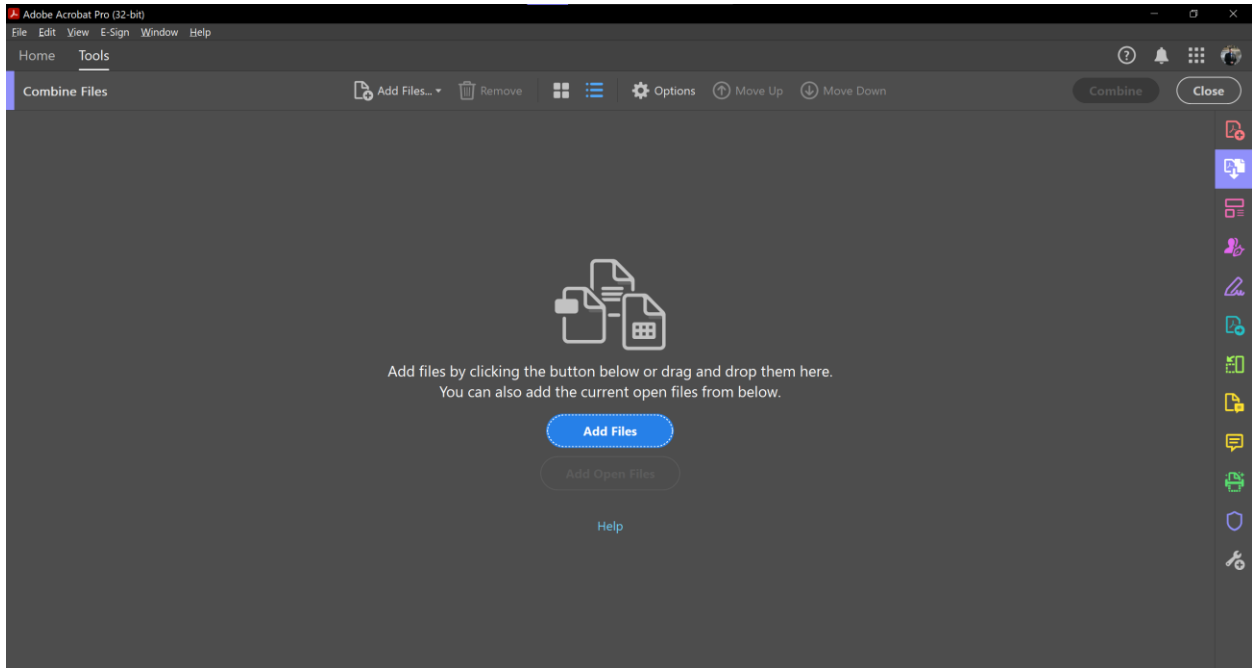
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- **Open Combine Files:** Click on "Combine Files" to open the Combine Files tool interface.



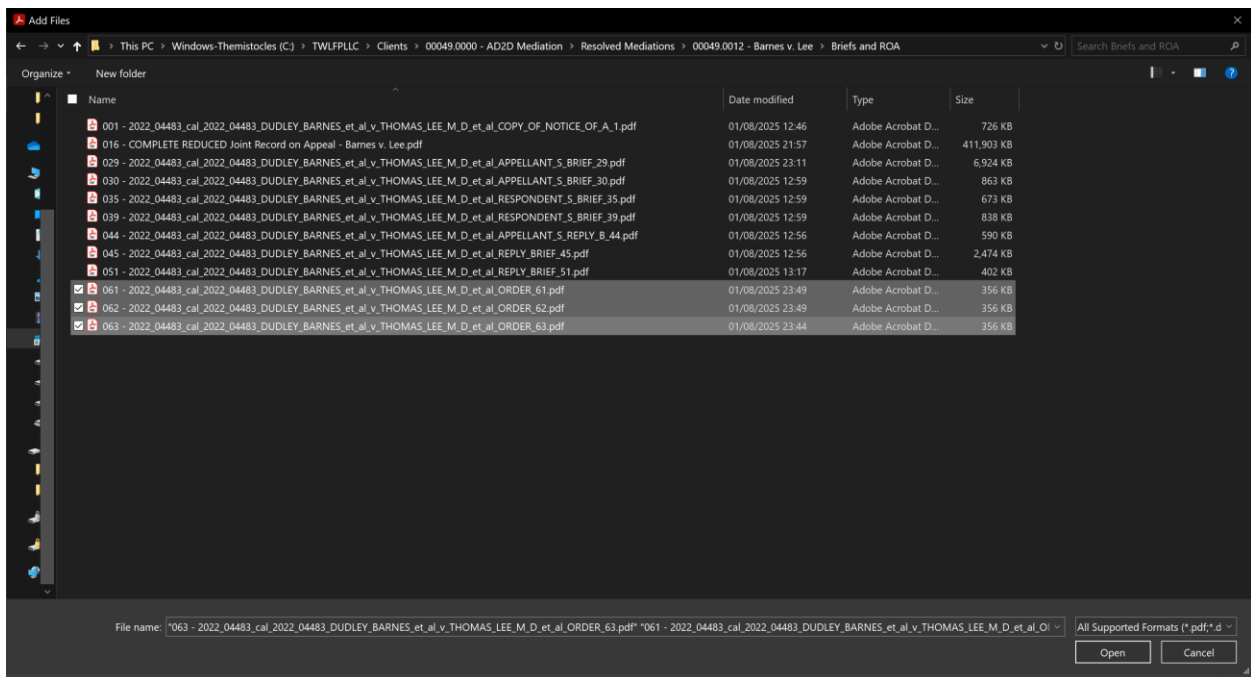
3. Add Files to Combine:

- **Add Files Button:** In the Combine Files window, click the "Add Files" button.



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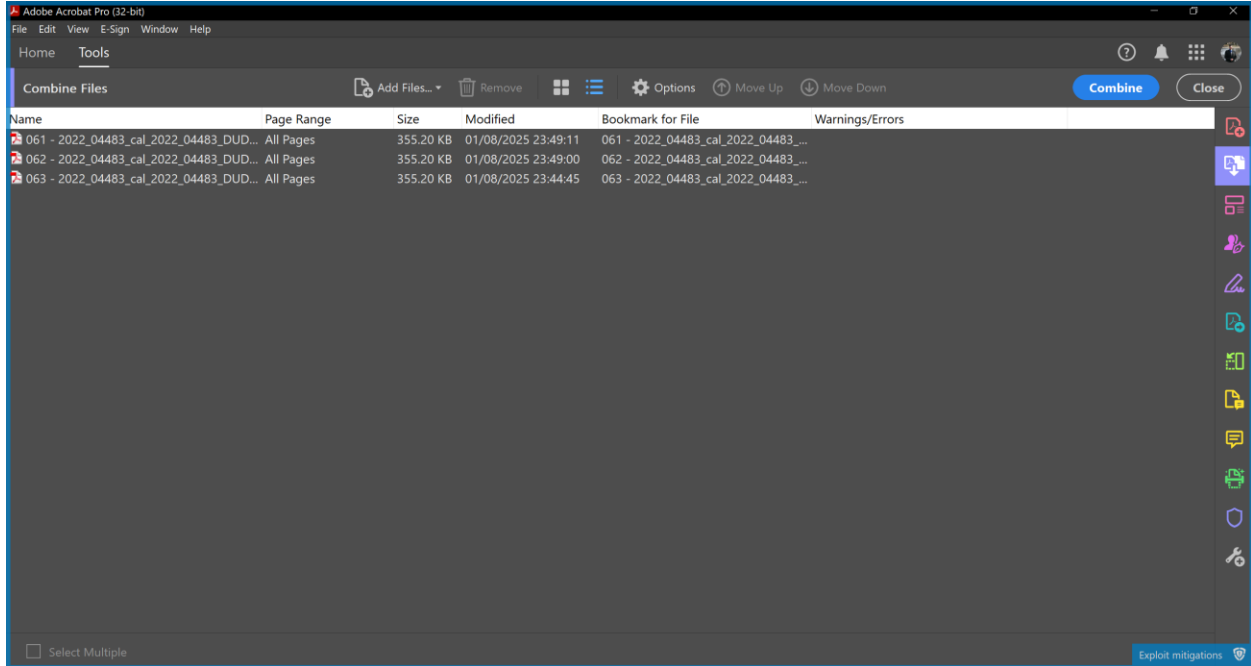
- **Select Files:** A file dialog box will open. Navigate to the location of the files you want to combine.
 - **Multiple File Selection:** To select multiple files at once:
 - Windows: Hold down the Ctrl key while clicking on each file.
 - Mac: Hold down the Command key while clicking on each file.
- **Open Files:** Once you've selected all the files you want to combine, click the "Open" button in the file dialog box.



4. Arrange Files (Optional):

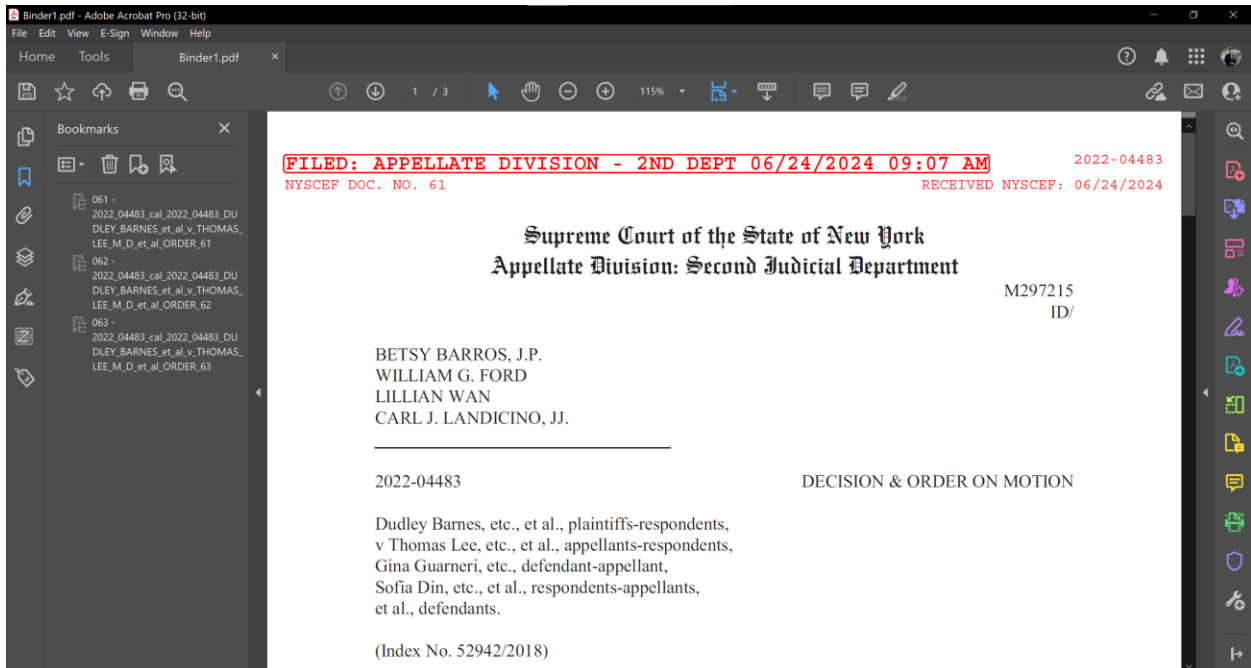
- **File List:** The Combine Files window will now display a list of the files you've added.
- **Reorder Files:** To change the order of the files in the combined PDF:
 - **Click and Drag:** Click on a file in the list and drag it up or down to its new position.
- **Remove Files:** To remove a file from the list, select it and click the "Remove" button (usually a trash can icon).

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5. Combine the Files:

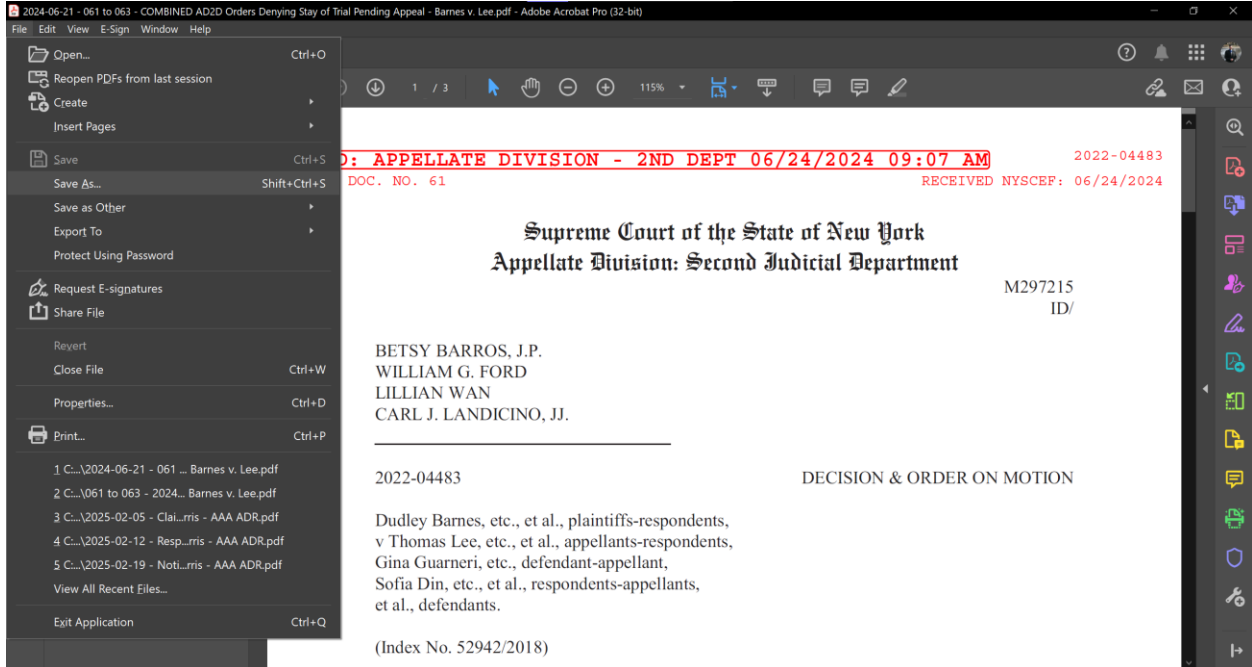
- **Combine Button:** Once you're satisfied with the file order, click the "Combine" button (often located in the top-right corner of the Combine Files window).
- **Combined PDF:** Acrobat will combine the files into a single PDF document. This combined PDF will open in a new tab in Acrobat.



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6. Save the Combined PDF:

- **File Menu:** Click on "File" in the menu bar.
- **Save As:** Select "Save As..." to save the combined PDF. Choose the location and filename for your new file.
- **Save:** Click the "Save" button.



Part 2: Reducing the File Size

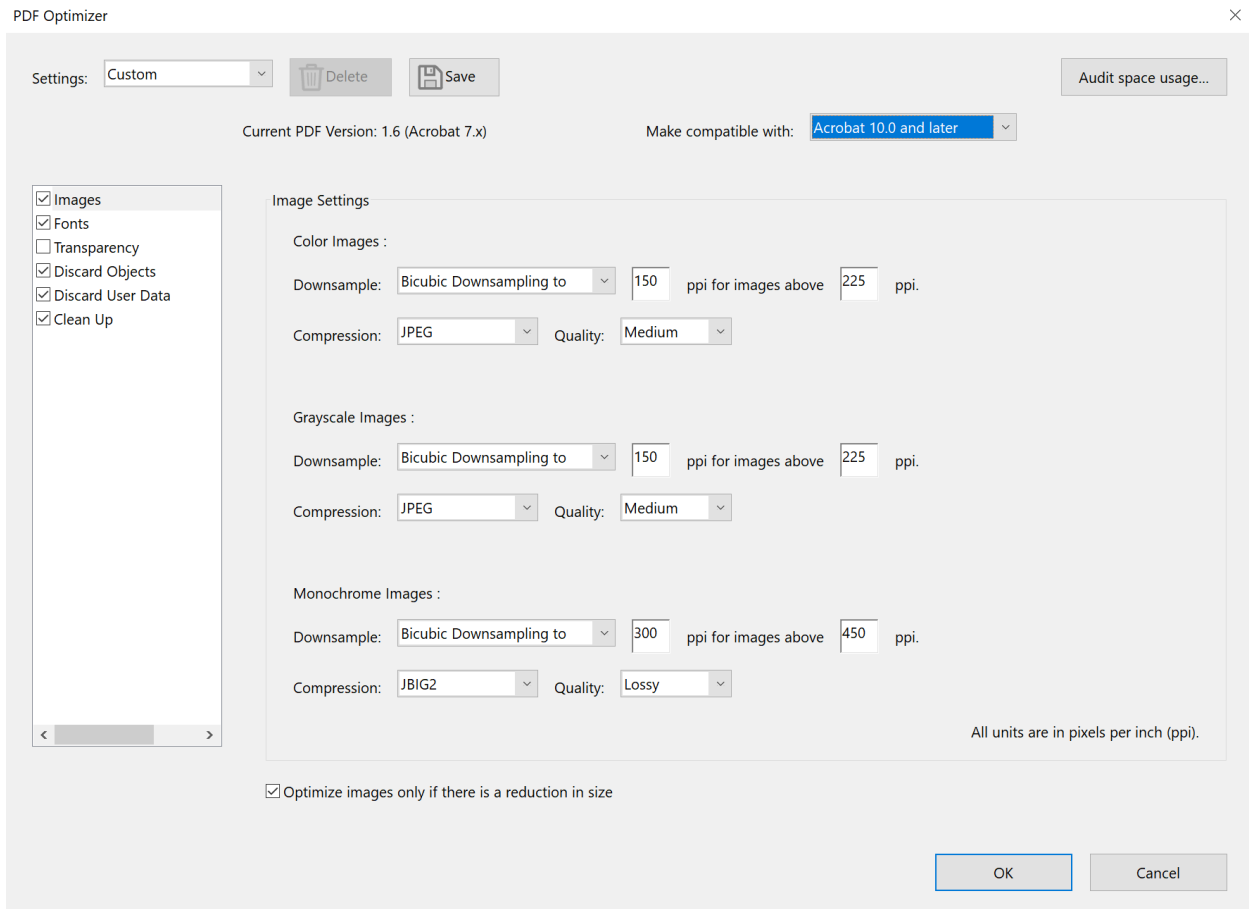
1. Open the Optimized PDF Tool:

- **Tools Center:** Go to Tools > Optimize PDF. This will open the Optimize PDF tool in a sidebar or a separate window.

2. Choose a Preset (Optional):

- **Standard:** Reduces file size with minimal impact on quality. Good for typical use.
- **Mobile:** Optimizes for faster viewing on mobile devices.
- **Reduce File Size:** Prioritizes reducing file size, which might result in some quality loss.
- **Custom:** Allows you to manually adjust specific optimization settings.

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3. Adjust Settings (Optional):

- If you choose "Custom" or want to fine-tune:
 - **Images:** Control image compression levels, downsampling, and conversion to grayscale.
 - **Fonts:** Embed only the characters used in the document or subset fonts.
 - **Transparency:** Flatten transparent objects to reduce file size.
 - **Discard Objects:** Remove unnecessary objects like form fields, annotations, or JavaScript.
 - **Clean Up:** Remove unused page resources.

4. Audit Space Usage (Optional):

- **Audit Space Usage:** Click the "Audit Space Usage..." button to see a detailed breakdown of how different elements (images, fonts, etc.) contribute to the file size. This can help you identify areas for optimization.

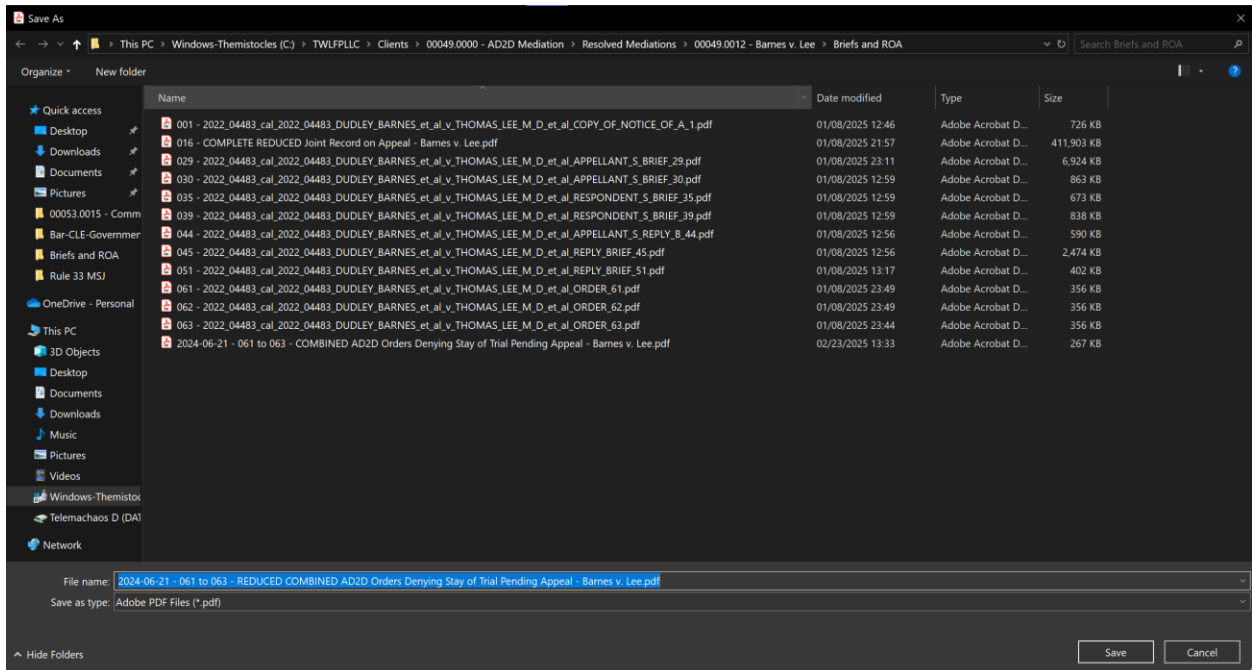
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5. Optimize the PDF:

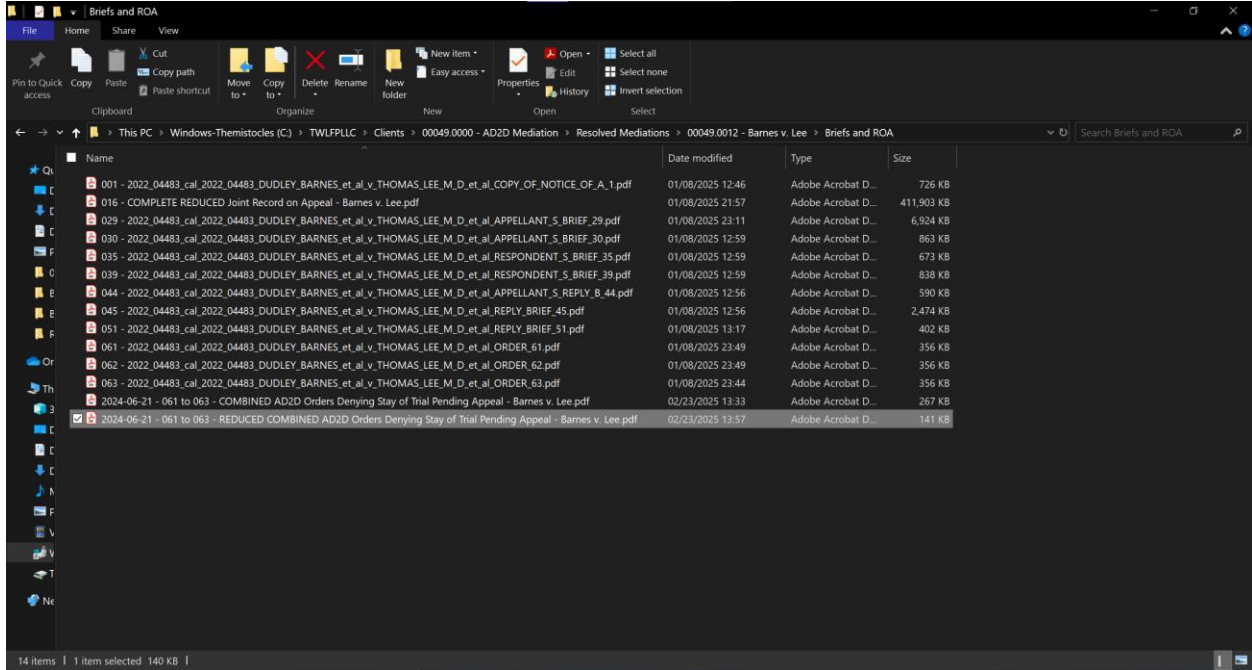
- **Optimize:** Once you've chosen your settings, click the "Optimize" button. Acrobat will process the PDF and apply the optimization settings.

6. Save the Optimized PDF:

- **File Menu:** Click on "File" in the menu bar.
- **Save:** Select "Save" to overwrite the existing PDF with the optimized version.
- **Save As (Optional):** To keep the original combined PDF, choose "Save As..." to save the optimized version as a separate file.



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Important Notes and Tips

- **File Size Reduction:** The amount of file size reduction will depend on the content of your PDF and the optimization settings you choose.
- **Quality vs. File Size:** Be mindful of the trade-off between file size and quality. Aggressive optimization can significantly reduce file size but may result in noticeable quality loss.
- **Experiment with Settings:** Don't hesitate to experiment with different presets and custom settings to find the best balance between file size and quality for your needs.
- **Original Files:** Keep backups of your original files before optimizing just in case you need to revert to the unoptimized version.

SECTION II: HIGHLIGHTING AND ANNOTATING PDFs

Gemini Advanced Prompt: Please provide a heavily-detailed step-by-step guide for highlighting and annotating PDF files using Adobe Acrobat DC Pro.

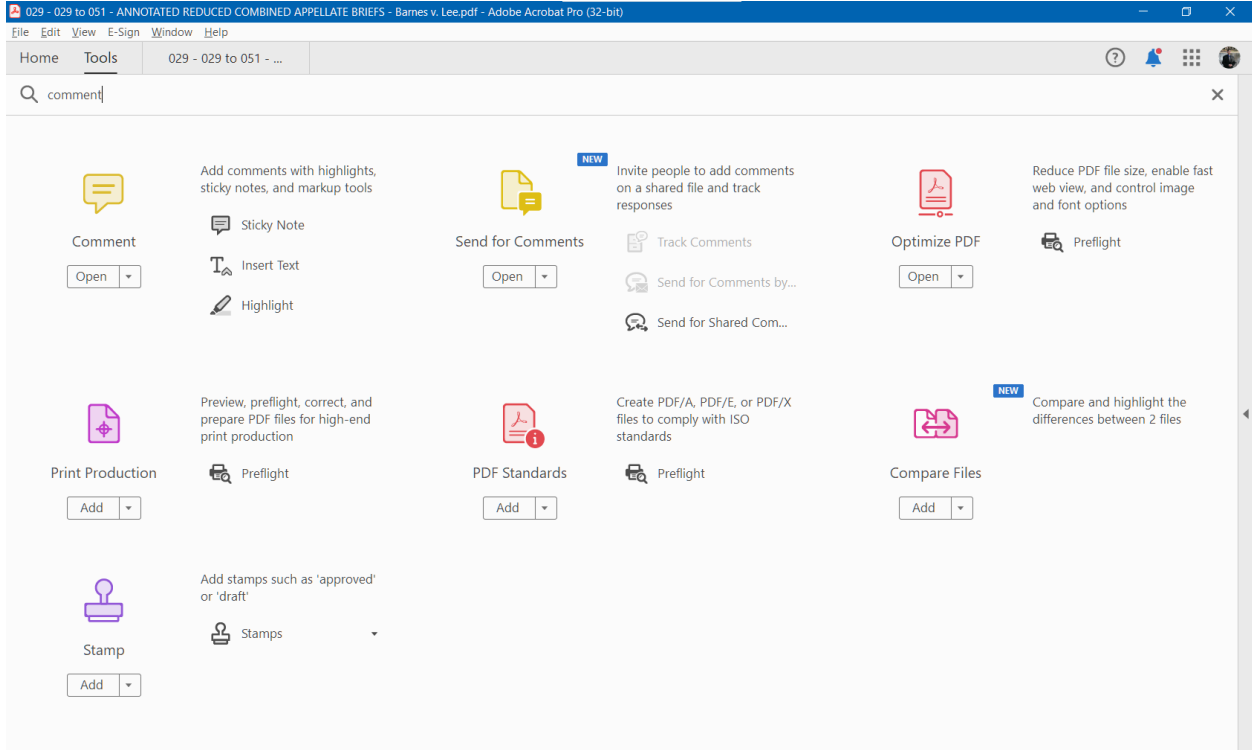
1. Launching Acrobat and Opening Your PDF

- **Locate and Open Acrobat DC Pro:**
 - **Windows:** This might be in your Start Menu, a desktop shortcut, or within your applications folder.
 - **Mac:** Check your Applications folder, Launchpad, or Dock.
- **Start Acrobat:** Double-click the Acrobat DC Pro application icon to launch it.
- **Open the PDF File:**
 - **Menu Bar:** Locate the "File" menu at the top of the Acrobat window.
 - **Open Option:** Click "File" and then select "Open..." from the dropdown menu.
 - **File Navigation:** A file dialog box will appear. Use this to navigate through your computer's folders to find the PDF file you want to work with.
 - **Select Your File:** Once you've located your PDF, click on its name to select it.
 - **Open the File:** Click the "Open" button in the file dialog box. This will load your PDF document into Acrobat DC Pro.

2. Accessing the Commenting Tools

- **Tools Menu:** In the menu bar at the top of the Acrobat window, click on "Tools".
- **Tools Center:** This will open the Tools center, which displays a variety of tool categories. You might need to scroll or click on a category to expand it.
- **Comment Category:** Locate and click on the "Comment" category. This will reveal the Comment toolbar, usually positioned below the main menu bar or in a sidebar.

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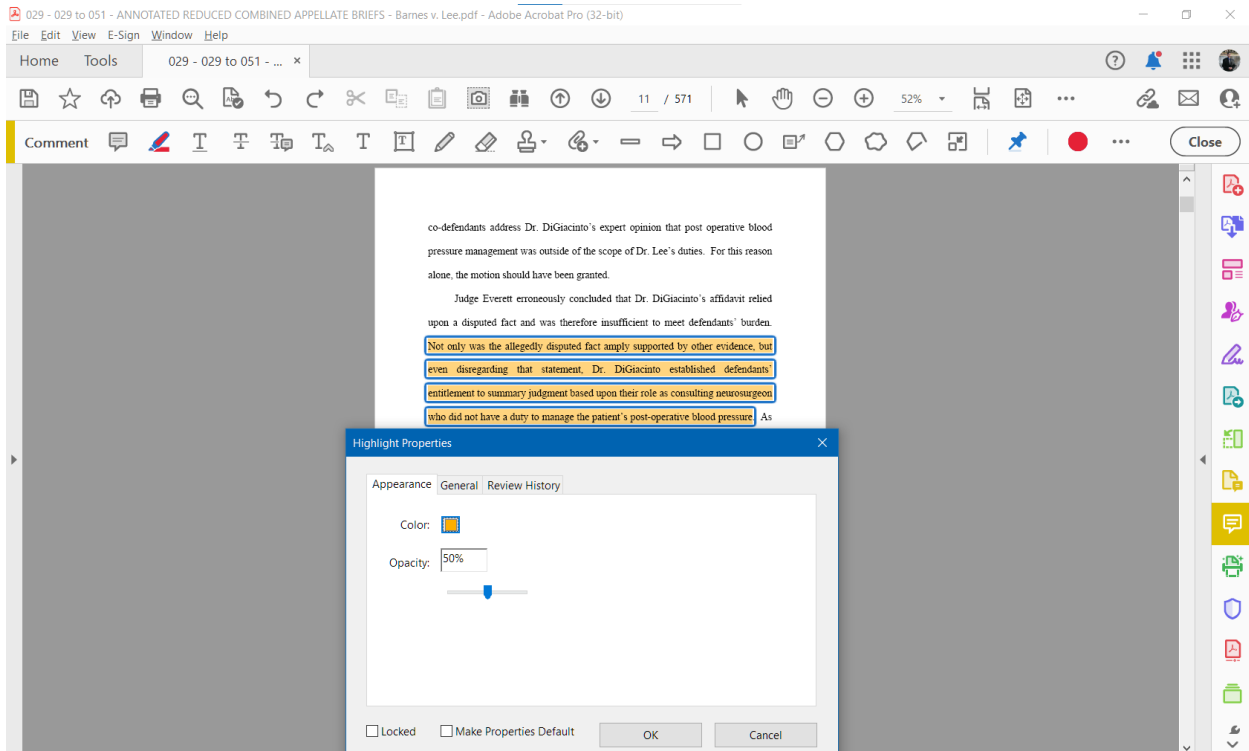


3. Highlighting Text

- **Highlight Text Tool:** In the Comment toolbar, look for the Highlight Text tool icon. It typically resembles a highlighter pen. Click on this icon to select the tool.
- **Highlight Color Selection (Optional):**
 - Color Options: Next to the highlighter icon, you might see a small downward-pointing arrow, a colored square, or a color palette icon.
 - Open Color Palette: Click on this element to open a dropdown menu or a color palette.
 - Choose Your Color: Select your desired highlight color from the available options.
- **Highlighting the Text:**
 - **Position the Cursor:** Move your mouse cursor to the beginning of the text you want to highlight within the PDF document.
 - **Click and Drag:** Click and hold down your left mouse button. While holding the button down, drag your cursor over the text you want to highlight.

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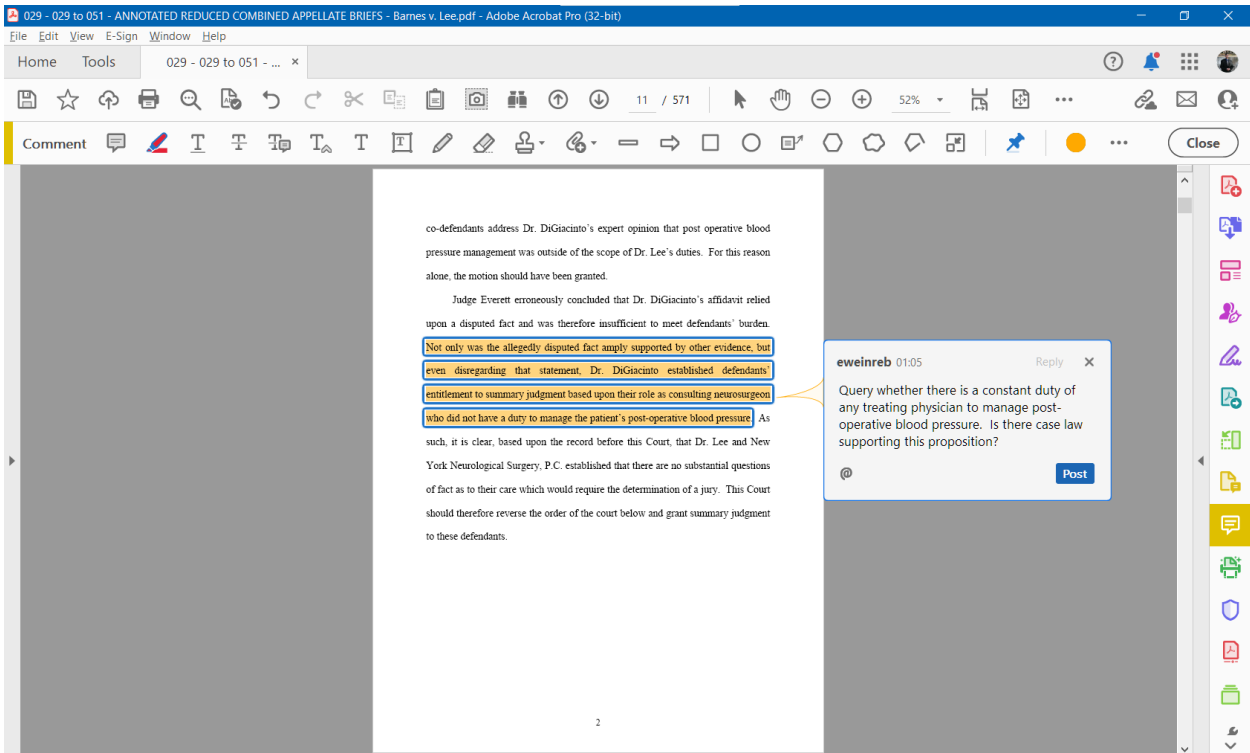
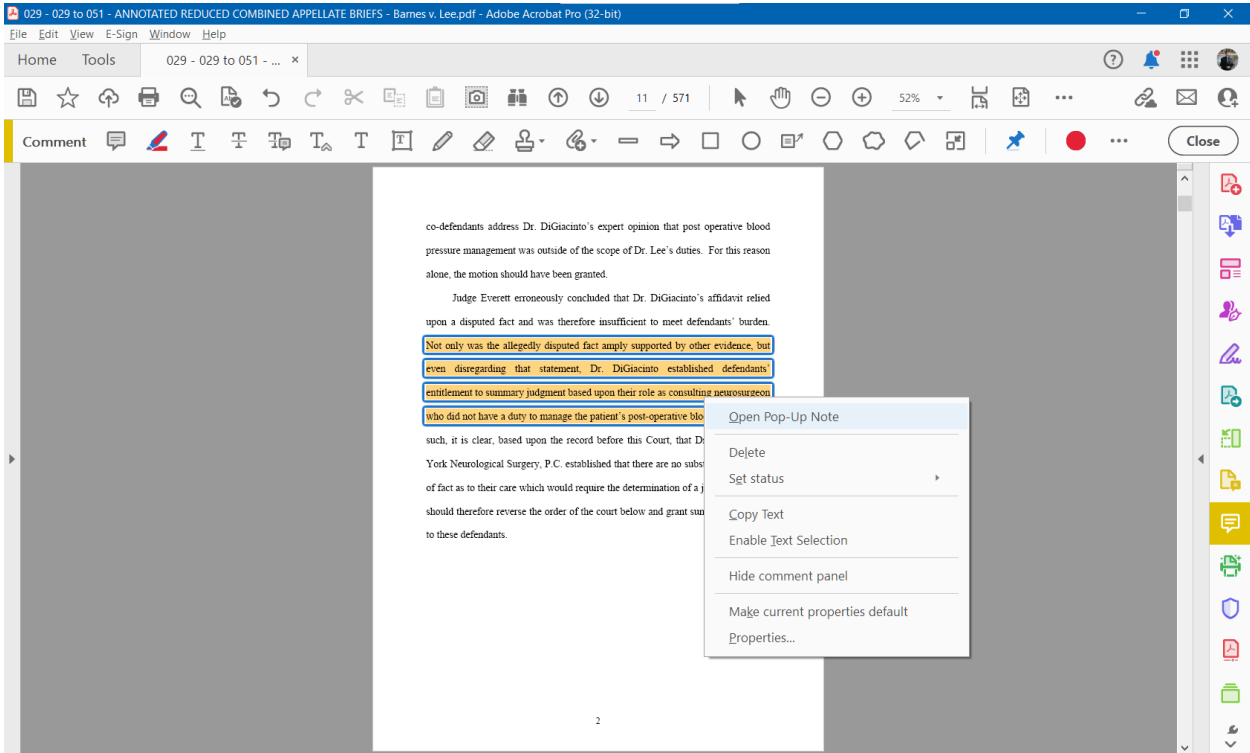
- **Release the Mouse:** Once you've highlighted the desired text, release the mouse button. The selected text will now be highlighted in your chosen color.



4. Adding a Note to a Highlight

- **Right-Click on the Highlight:** Move your mouse cursor over the highlighted text. Right-click (Windows) or Control-click (Mac) on the highlighted area.
- **Open Pop-up Note:** A context menu will appear. Select the option labeled "Open Pop-up Note" (the exact wording might vary slightly).
- **Type Your Comment:** A small note box will appear near the highlight. Click inside this note box to activate it. Type your comment, annotation, or note within the box.

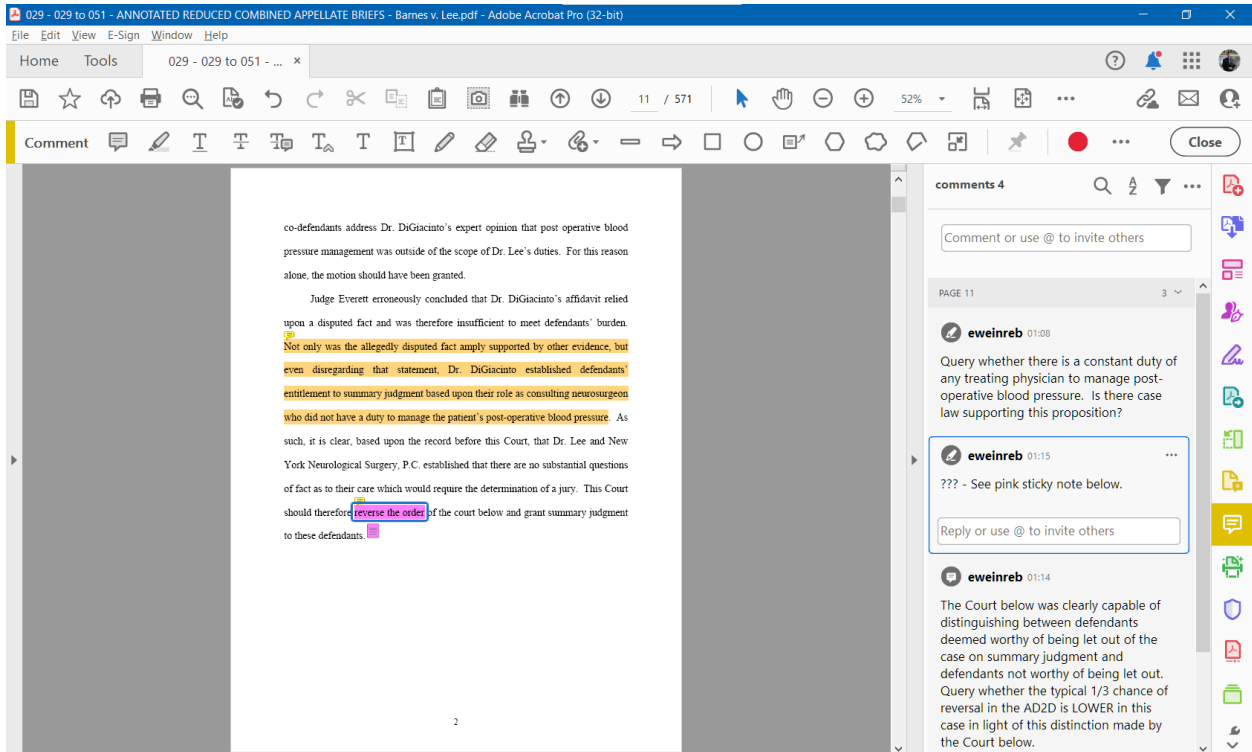
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5. Adding Sticky Notes

- **Sticky Note Tool:** In the Comment toolbar, locate the Sticky Note tool icon. It usually looks like a small, square sticky note. Click on this icon to select the tool.
- **Place the Sticky Note:**
 - **Choose a Location:** Move your mouse cursor to the location in the PDF document where you want to place the sticky note.
 - **Click to Place:** Click once with your left mouse button to place the sticky note at that location. A small sticky note icon (often yellow) will appear.
- **Type Your Comment:**
 - **Open the Note:** A note box will automatically pop up when you place the sticky note. If it doesn't, click on the sticky note icon.
 - **Add Your Text:** Type your comment, note, or annotation inside the note box.

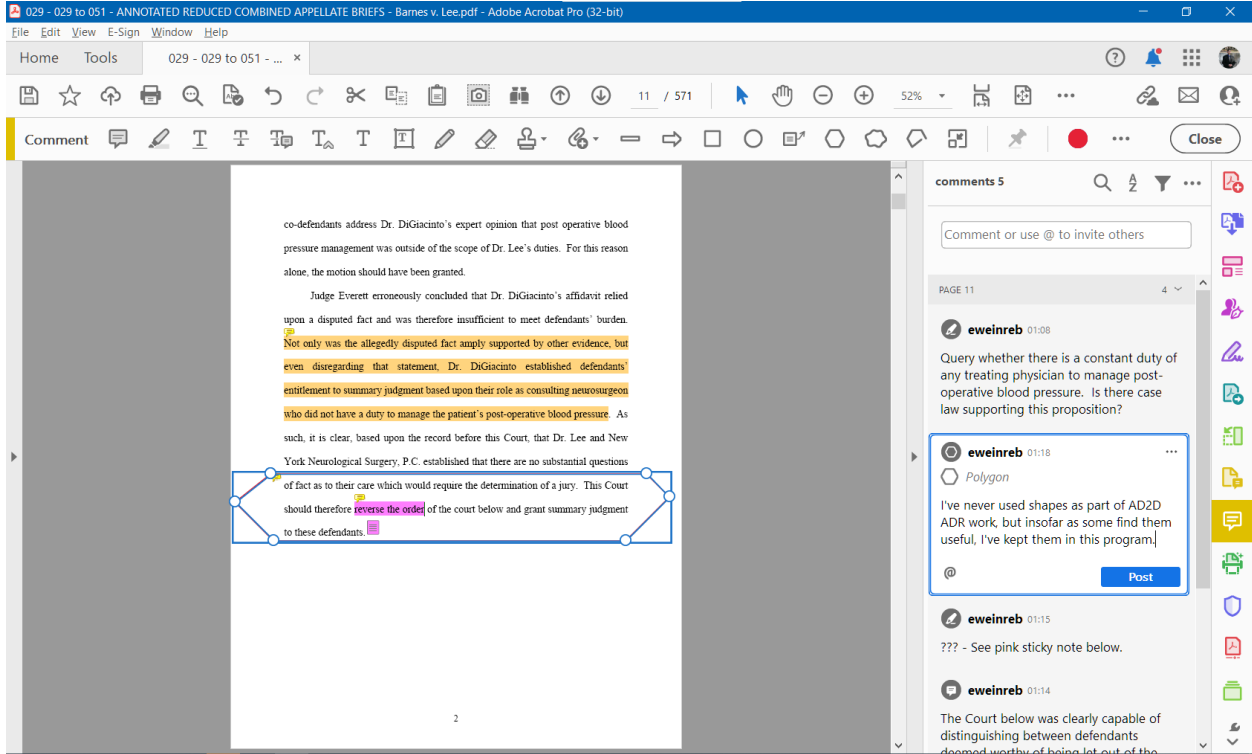


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6. Adding Shapes and Drawings

- **Shape Tools:** The Comment toolbar will likely have a section with icons for various shapes, including:
 - **Rectangles:** Used to draw rectangular boxes.
 - **Circles/Ovals:** Used to draw circles or ovals.
 - **Arrows:** Used to draw arrows pointing to specific areas.
 - **Lines:** Used to draw straight lines.
- **Select a Shape Tool:** Click on the icon for the shape you want to add to your PDF.
- **Draw the Shape:**
 - **Click and Drag:** In the PDF document, click and hold down your left mouse button where you want to start the shape.
 - **Create the Shape:** Drag your mouse to create the shape in the desired size and position.
 - **Release the Mouse:** Release the mouse button to complete the shape.
- **Add a Comment to a Shape (Optional):**
 - **Right-Click:** Right-click (Windows) or Control-click (Mac) on the shape you've drawn.
 - **Open Pop-up Note:** Select "Open Pop-up Note" (or a similar option) from the context menu.
 - **Type Your Comment:** A note box will appear. Type your comment related to the shape in this box.

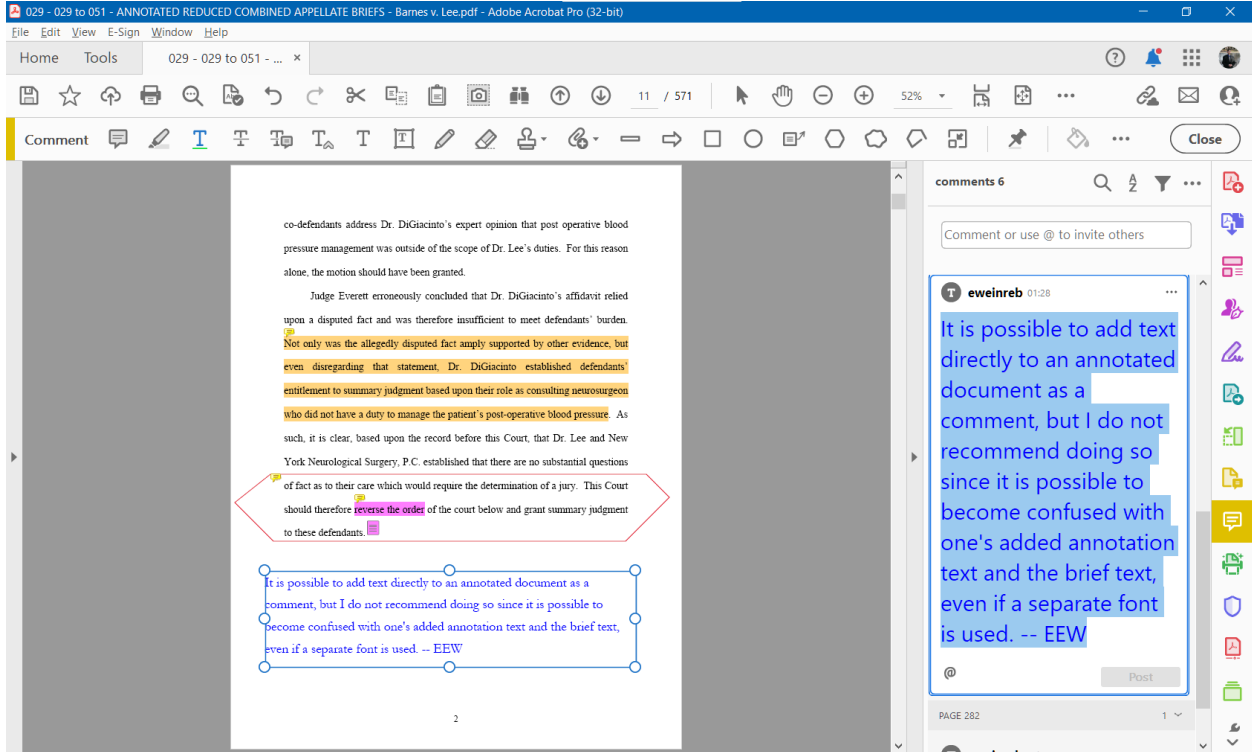
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7. Using the Text Box Tool

- **Text Box Tool:** In the Comment toolbar, locate the Text Box tool icon. It usually looks like a square with horizontal lines inside, representing lines of text.
- **Place the Text Box:**
 - **Choose a Location:** Click on the area in the PDF document where you want to insert the text box.
 - **Text Box Appears:** A rectangular text box will appear at the location you clicked.
- **Type Your Text:**
 - **Click Inside:** Click inside the text box with your mouse cursor to activate it for typing.
 - **Enter Your Text:** Start typing your text into the text box.
 - **Formatting:** You can usually format the text (font, size, color, etc.) using options in the Comment toolbar or the Properties bar.

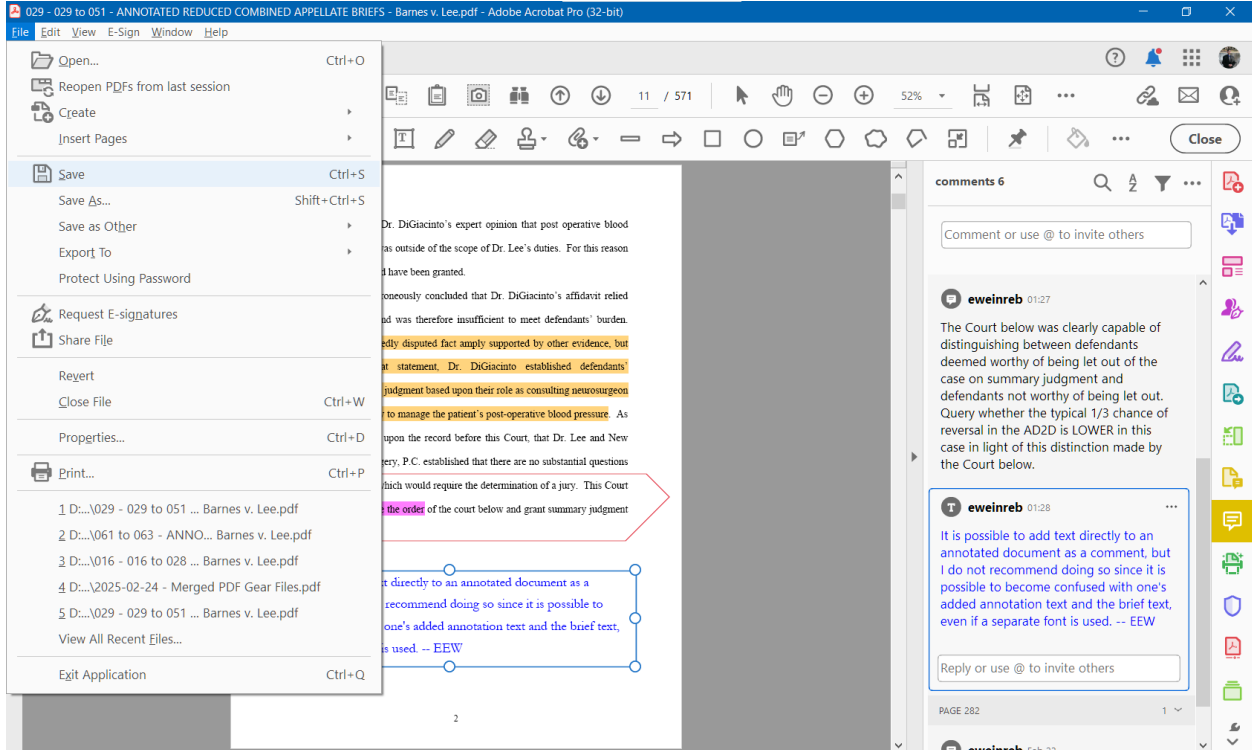
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8. Saving Your Annotated PDF

- **File Menu:** Click on the "File" menu in the menu bar at the top of the Acrobat window.
- **Save:** Select "Save" from the dropdown menu. This will overwrite your original PDF file with the version that includes all your annotations.

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- **Save As (Optional):** If you want to keep the original PDF file unchanged, choose "Save As..." from the File menu. This will allow you to save the annotated version as a separate file.

Additional Tips and Information

- **Properties Bar:** When you have an annotation tool selected, keep an eye on the Properties bar. This bar usually appears below the menu bar and provides options to customize the appearance of your annotations (color, line thickness, font, opacity, etc.).
- **Keeping Tools Selected:** If you're adding multiple annotations of the same type (e.g., many highlights), you can keep the tool selected. This way, you don't have to re-select it each time you want to add another annotation of that type.
- **Comments List:** To view and manage all your annotations in a centralized location, use the Comments List. You can usually access this by going to View > Show/Hide > Navigation Panes > Comments. The Comments List allows you to filter, sort, reply to, and organize your comments.

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- **Keyboard Shortcuts:** Acrobat DC Pro offers keyboard shortcuts for many tools and actions. Explore the menus and toolbars to discover these shortcuts, which can help speed up your workflow.
- **Context Menus:** Right-clicking (Windows) or Control-clicking (Mac) on annotations often brings up context menus with options to edit, delete, reply to, or otherwise manage those annotations.

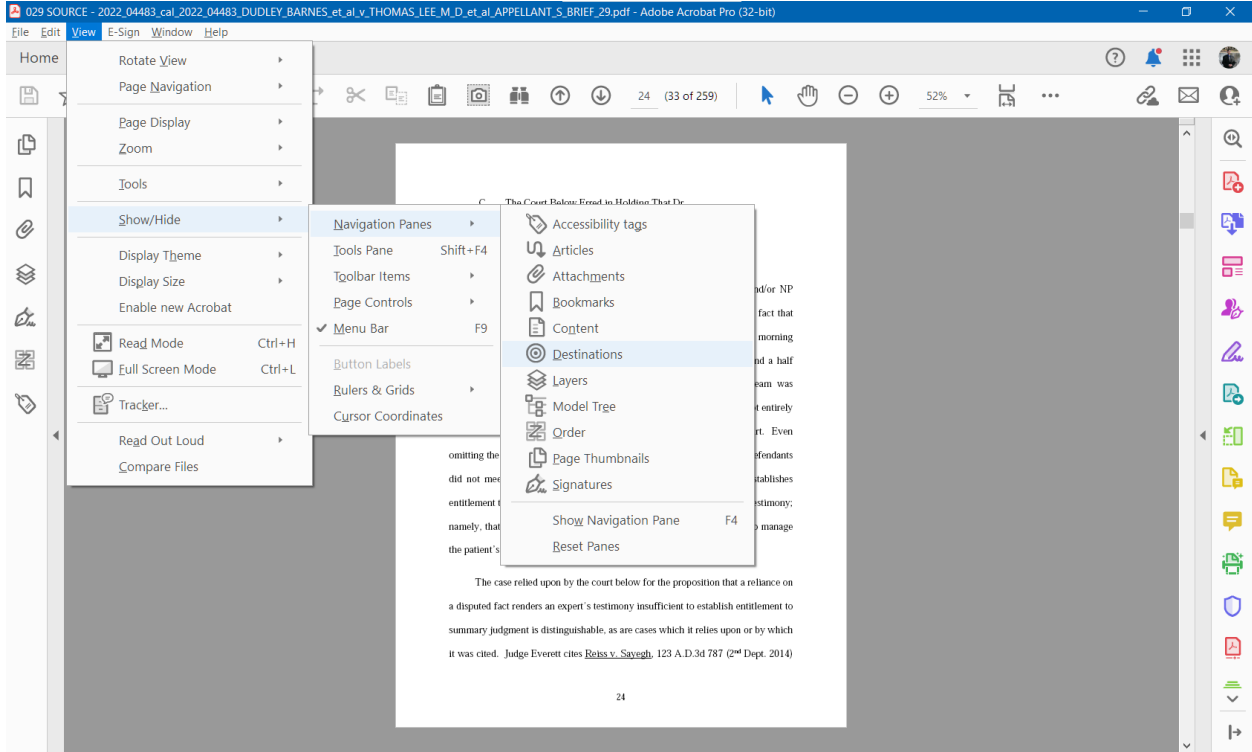
SECTION III: INTERNAL AND EXTERNAL HYPERLINKING

Gemini Advanced Prompt: Please provide a heavily-detailed step-by-step guide for setting up internal hyperlinked references to target destinations located within the same PDF file as the referring text using Adobe Acrobat DC Pro.

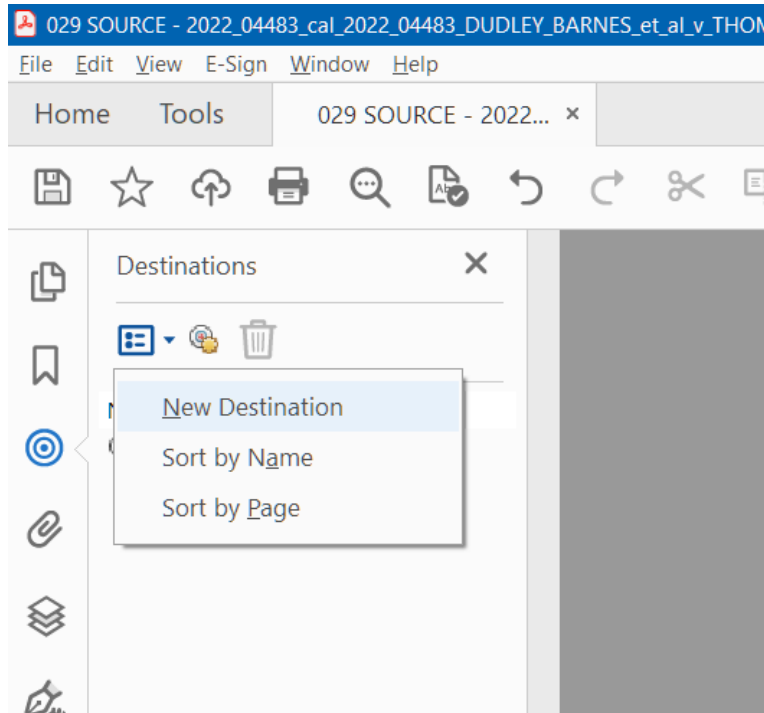
1. Prepare Your Destination

- **Navigate to the Target Location:** Open your PDF file in Acrobat DC Pro. Go to the page and specific location within the document where you want the hyperlink to jump to (the "destination").
- **Set the Desired View (Optional):**
 - **Zoom Level:** Adjust the zoom level to how you want the page to appear when the user clicks the link.
 - **Page Layout:** Set the page layout (e.g., single page, two-page spread) as desired.
 - **Window Size:** Resize the Acrobat window to the preferred size for viewing the destination.
- **Create a Destination:**
 - **Destinations Panel:** Go to View > Show/Hide > Navigation Panes > Destinations to open the Destinations panel.

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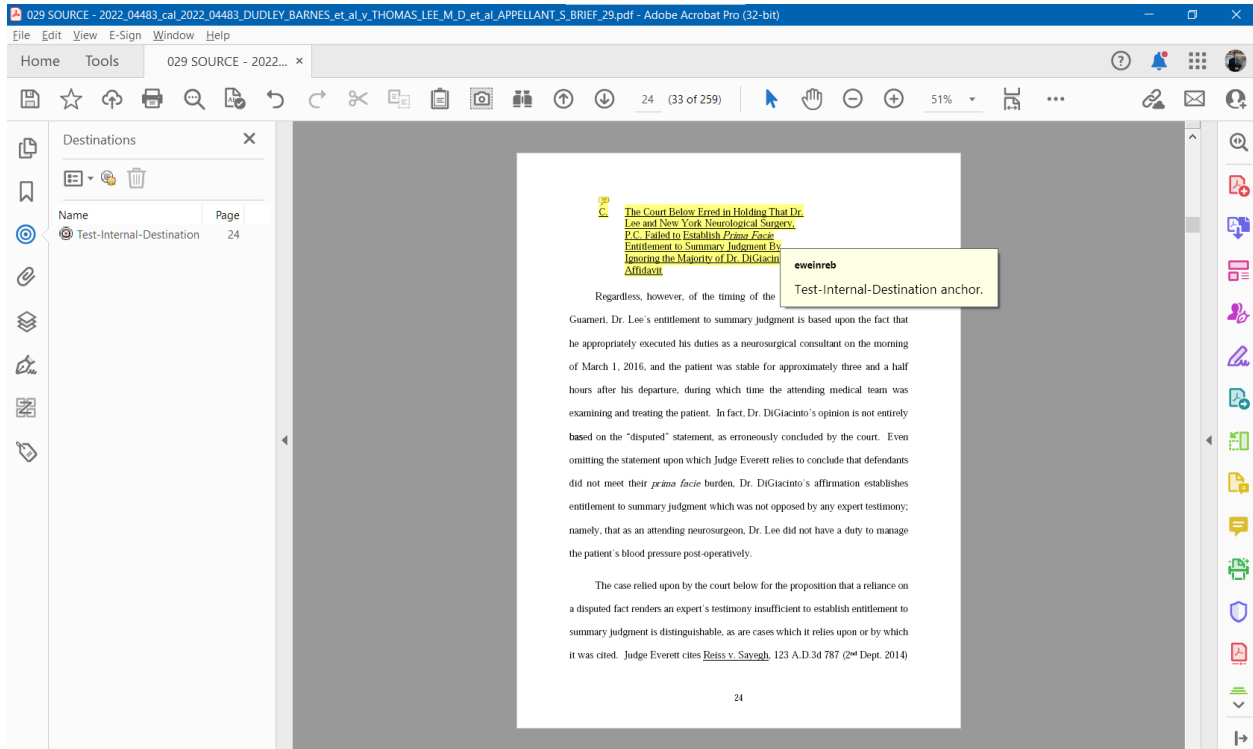


- **New Destination:** In the Destinations panel, click the Options menu (which looks like a small bulletin board) and select "New Destination..."



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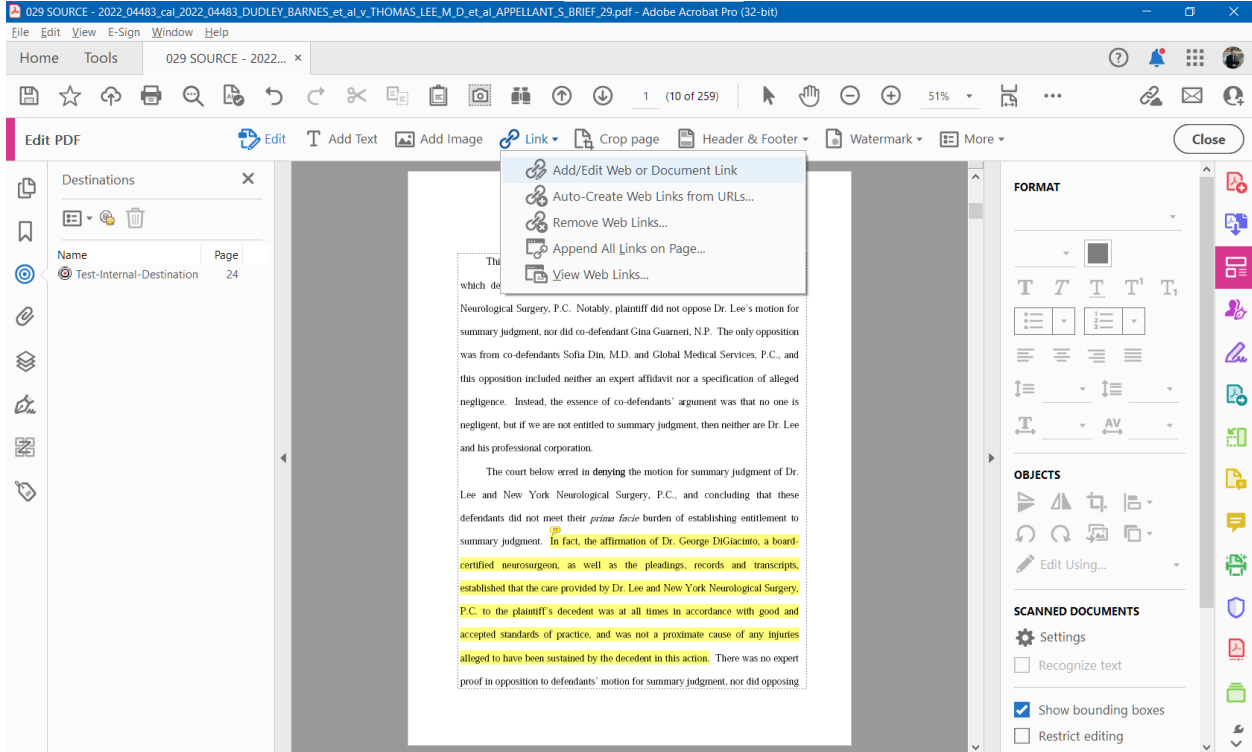
- **Name the Destination:** A dialog box will appear. Enter a descriptive name for your destination (e.g., "Section 2.3" or "Figure 1 Details"). Click "OK". This creates a named anchor at your chosen location.



2. Create the Hyperlink

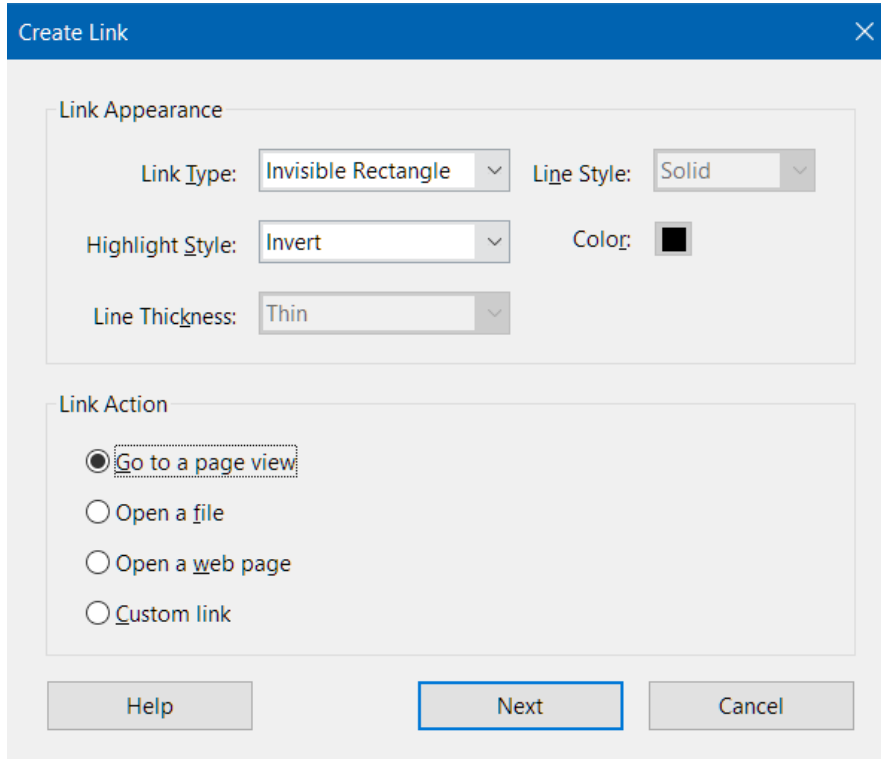
- **Navigate to the Referring Text:** Go to the location in your PDF where you want to insert the hyperlink (the "referring text").
- **Open the Link Tool:**
 - **Tools Menu:** Go to Tools > Edit PDF > Link > Add/Edit Web or Document Link.
 - **Cursor Change:** Your cursor will change to a crosshair.

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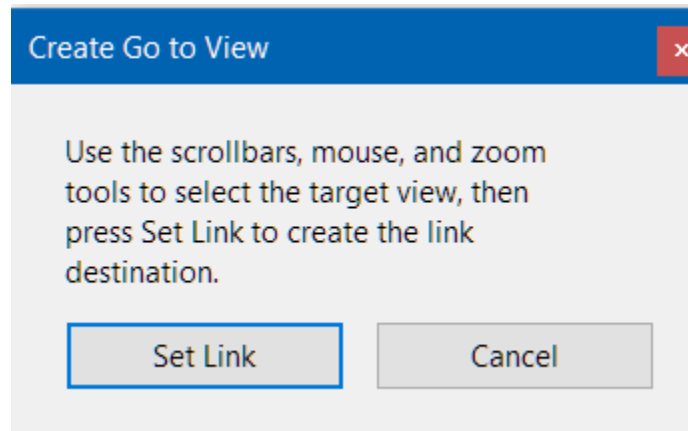


- **Create the Link Area:**
 - **Drag to Select:** Click and drag your cursor over the selected text or object to create a rectangular link area.
 - **Adjust the Area (Optional):** You can resize or reposition the link area using the handles that appear around it.
- **Link Properties Dialog Box:** The "Create Link" dialog box will appear.
 - **Link Appearance:**
 - **Invisible Rectangle:** Choose this if you don't want any visual indication of the hyperlink.
 - **Visible Rectangle:** Choose this to have a visible border or highlight around the linked text/object. You can customize the appearance (color, line style, highlight style) using the options provided.
 - **Link Action:**
 - **Go to a page view:** Select this option and click the "Next" button.

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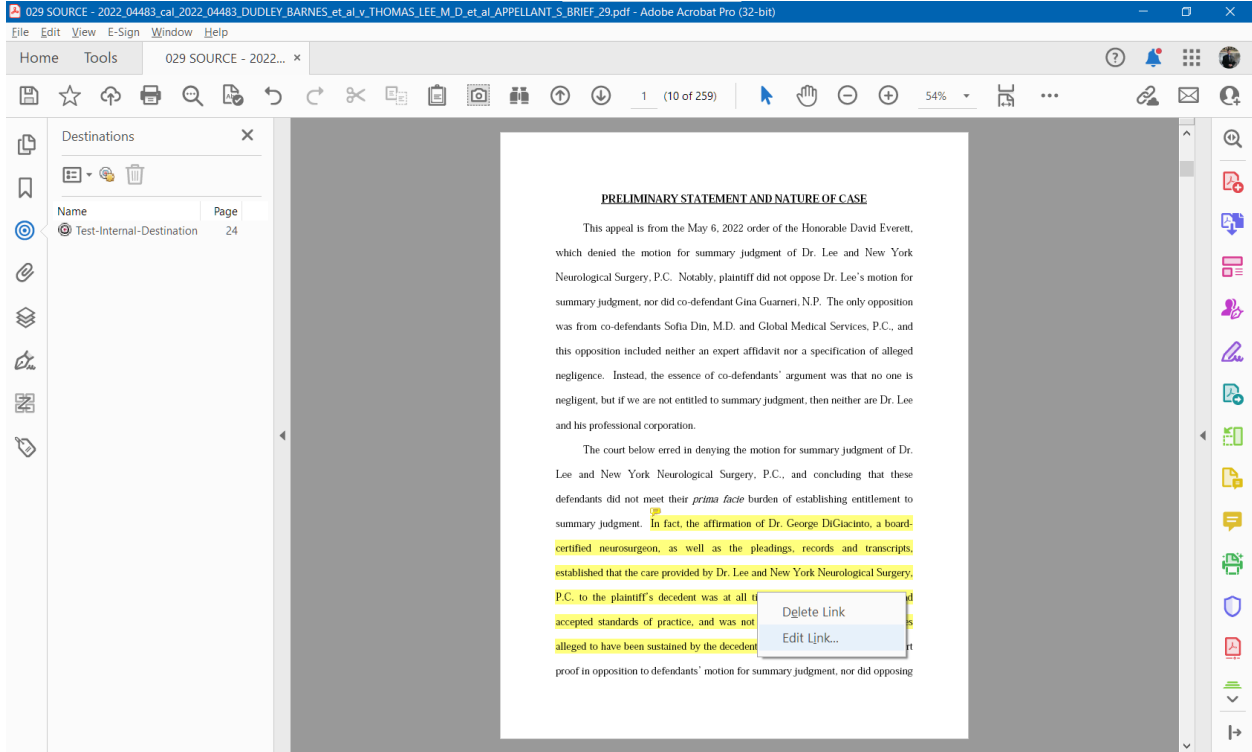
Then, in the following “Create Go to View” window, immediately click on the “Set Link” option.



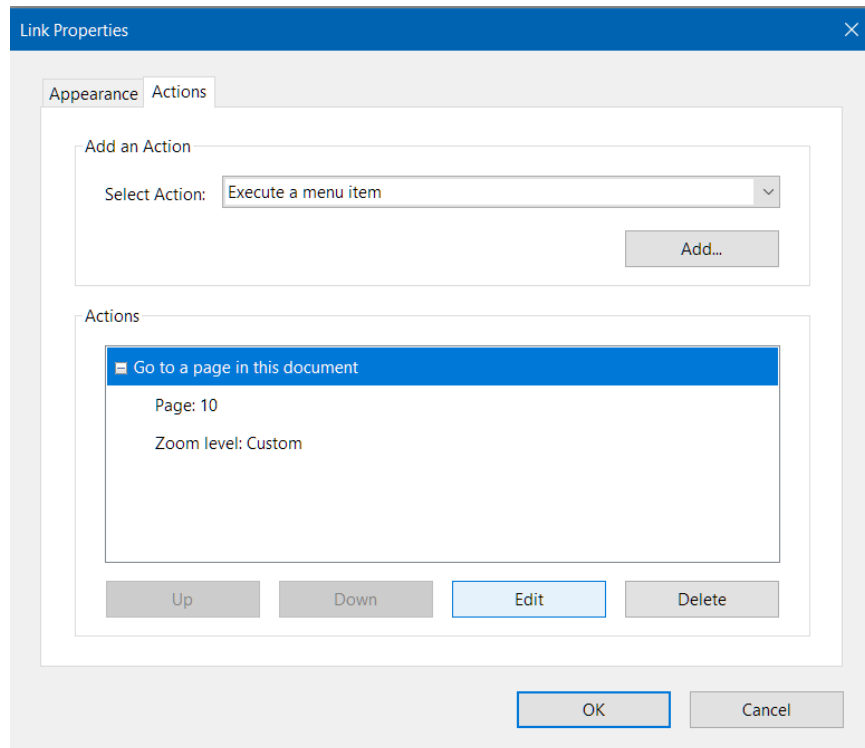
3. Set the Hyperlink Destination

- **Set the Destination anchor as a link target:** Close out of “Edit” mode, right-click on the hyperlinked text area, and select the “Edit Link...” option.

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- Then, in the resulting “Link Properties” window, click on “Go to a page in this document” and then select the “Edit” option.



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- **Choose Destination:**
 - **Destination List:** In the "Go to a page in this document" dialog box, you'll see a list of the destinations you've created in the document after you click on the "Browse..." button.

Go to a page in this document

Options

Use Page Number

Page: of 259

Zoom:

Use Named Destination

Name:

- **Select Your Destination:** Choose the destination that corresponds to the location you want the hyperlink to jump to and then click the "OK" button.

4. Test the Hyperlink

- **Save the PDF:** Go to File > Save to save your changes.
- **Test the Link:** Click the hyperlink you created. It should jump to the destination you specified.

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Important Notes and Tips

- **Destination Names:** Use clear and descriptive names for your destinations to make them easy to identify in the destination list.
- **Link Appearance:** Consider the visual design of your PDF when choosing the link appearance. Invisible links are clean but might not be obvious to users. Visible links provide a visual cue but can affect the overall look of the document.
- **Editing Links:** To edit an existing hyperlink, use the Edit PDF > Link > Add/Edit Web or Document Link tool, click on the link, and make changes in the "Link Properties" dialog box.
- **Deleting Links:** To delete a hyperlink, select the Edit PDF > Link > Add/Edit Web or Document Link tool, click on the link, and press the Delete key.

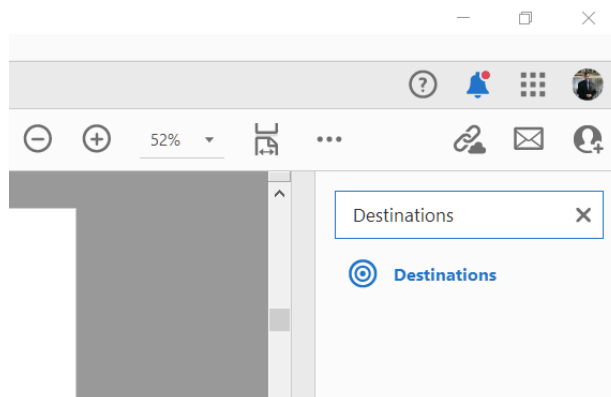
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Gemini Advanced Prompt: Please provide a heavily-detailed step-by-step guide for setting up internal hyperlinked references to target destinations located within a different PDF file than the referring text using Adobe Acrobat DC Pro.

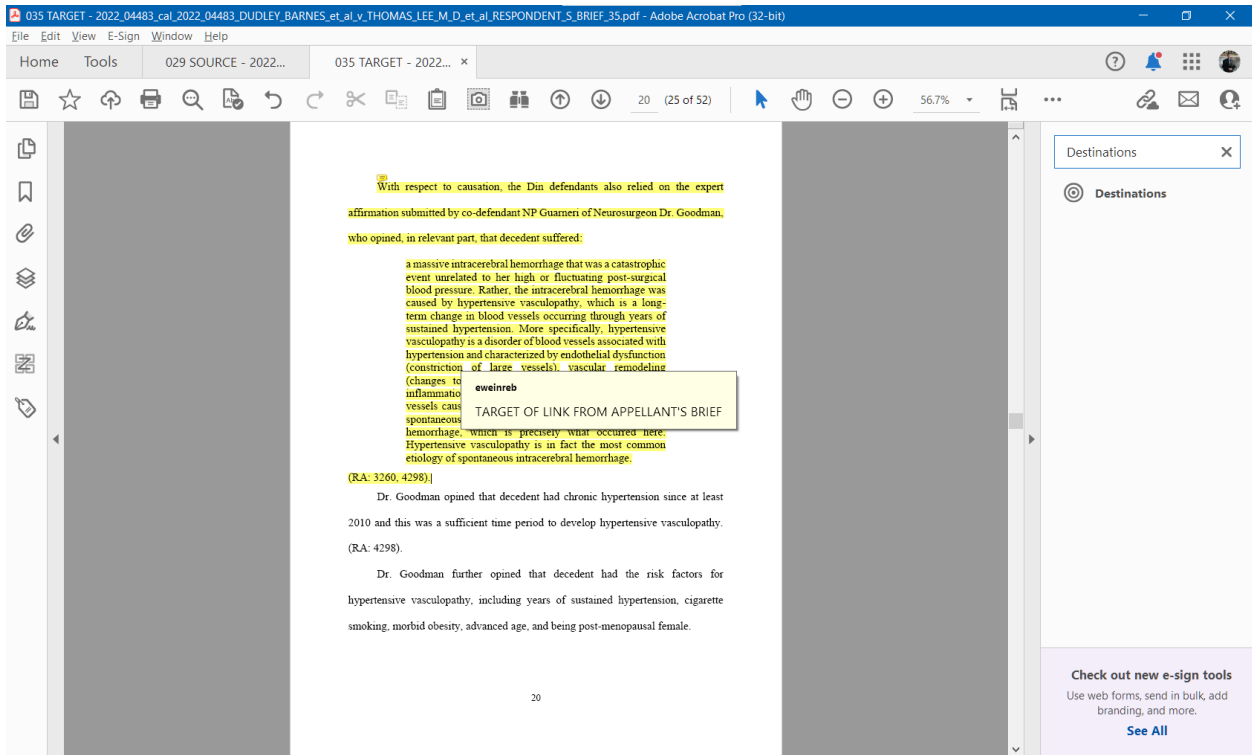
Introductory Note: Let's break down how to create cross-document hyperlinks in PDFs using Adobe Acrobat DC Pro. This is more complex than internal links within a single document but achievable with these detailed steps:

Part 1: Preparing the Target Document (Where the link points to)

1. **Open the Target PDF:** Launch Adobe Acrobat DC Pro and open the PDF file that contains the content you want to link to. This is the document the user will be taken to when they click the hyperlink.
2. **Identify the Destination:** Pinpoint *exactly* where you want the link to direct the user. This could be a specific page, a particular paragraph, a heading, or even a specific image. Acrobat offers a few ways to define this destination:
 - **Named Destinations (Recommended):** This is the most robust and reliable method, especially if the target document might be edited later. It creates a named, persistent pointer.
 - Select the text or area you want to target. If it's a heading or paragraph, click within the text. If it's an image, select the image.
 - In the right-hand Tools search bar (a/k/a “Search Tools” pane), type “Destinations.”

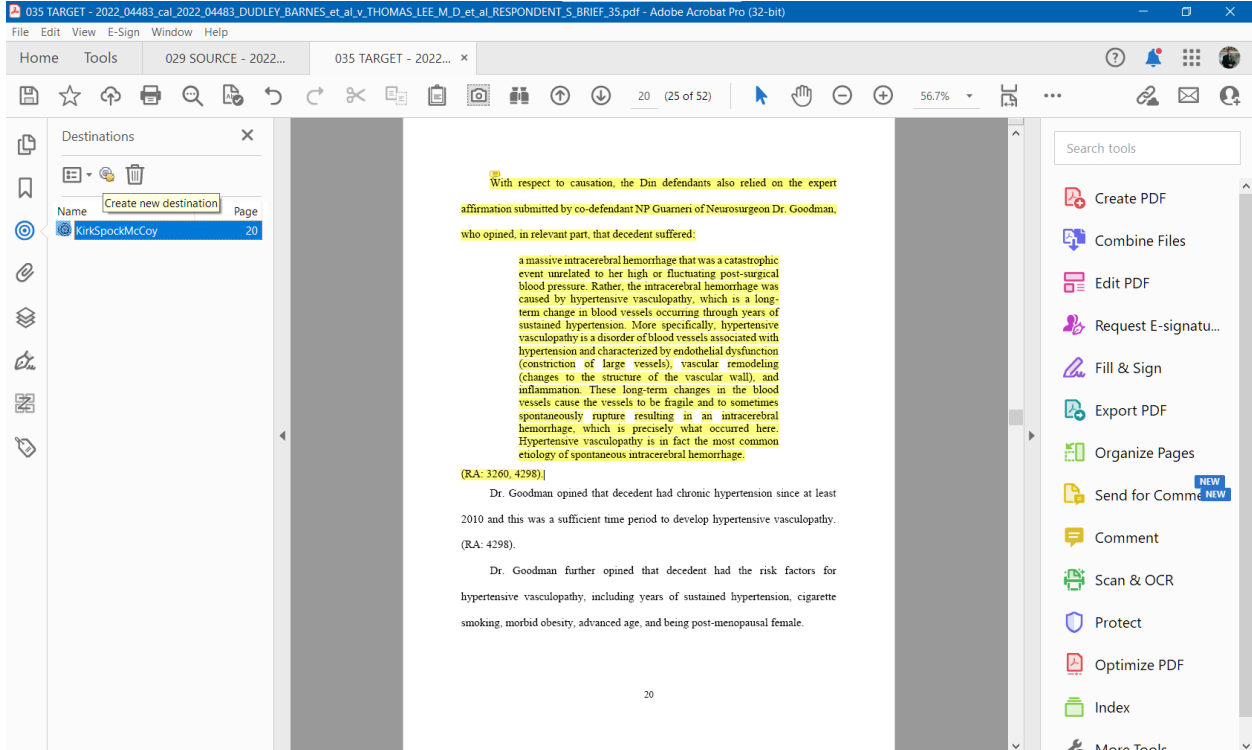


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- Click the “*Create new destination*” icon in the left-hand pane. A dialog box will appear. Give your destination a descriptive and unique name (e.g., "Section3Introduction," "Figure2Caption"). **Avoid spaces and special characters.**

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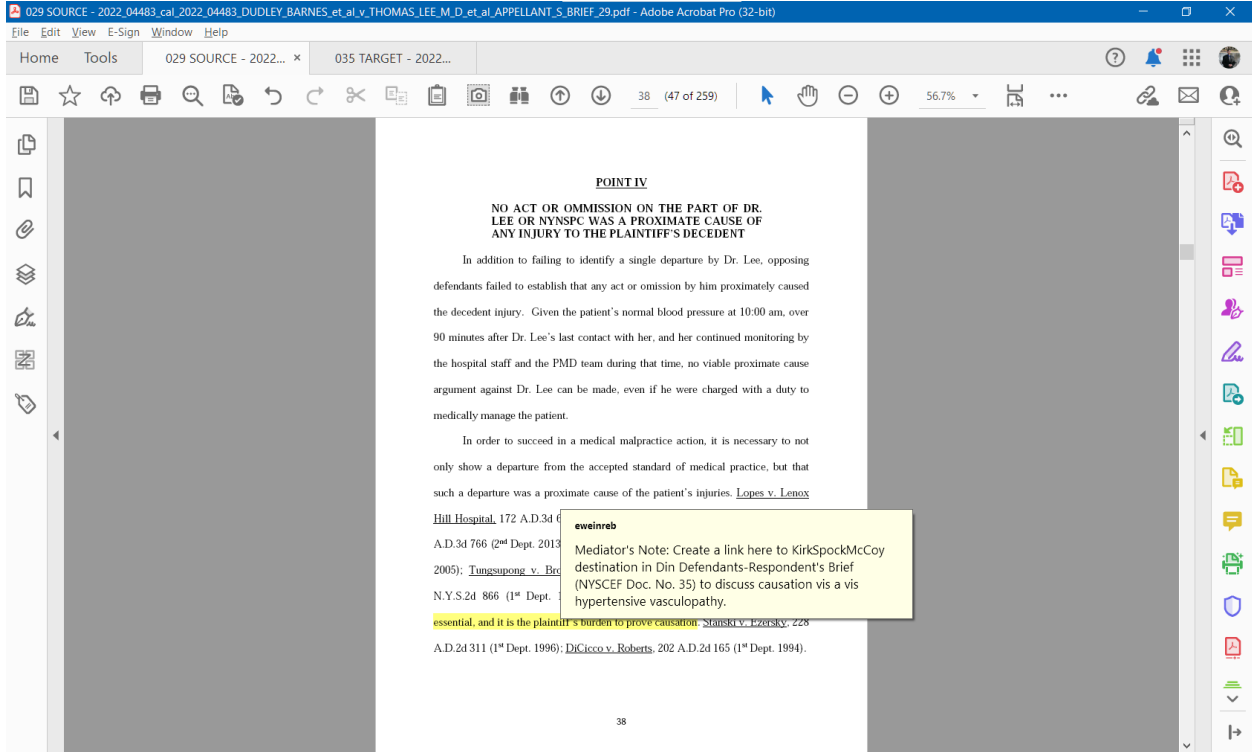
- Repeat this process for all the locations in this target document you want to link to. Keep a record of the named destinations you create!
 - **Page Number (Less Reliable):** You can link directly to a page number, but this is less robust. If pages are added or removed from the target document, the link will break. It's generally okay for static documents.

3. **Save the Target PDF:** Save the target PDF after creating named destinations or noting the page numbers.

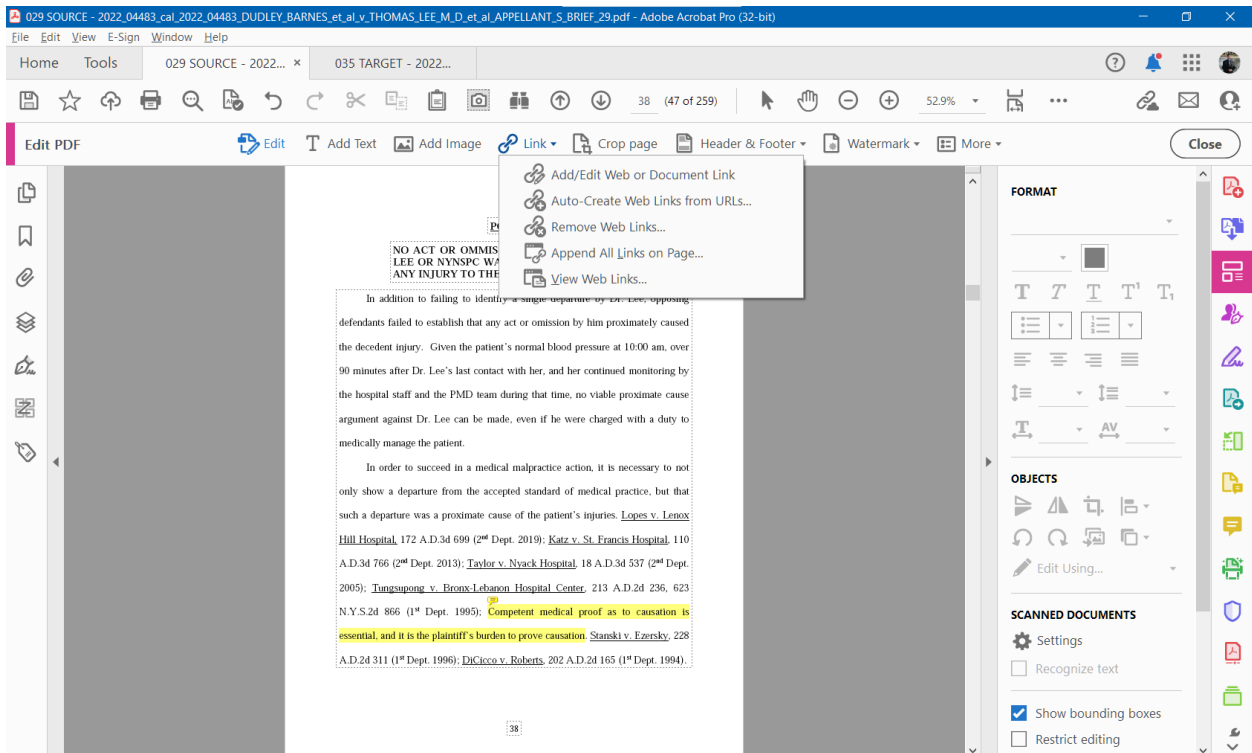
Part 2: Creating the Hyperlink in the Source Document (Where the link originates)

1. **Open the Source PDF:** Open the PDF document where you want to create the hyperlink.
2. **Select the Link Text/Area:** Choose the text or image that you want to function as the hyperlink.
3. **Create the Hyperlink:**
 - Go to *Edit PDF* (or *Tools > Edit PDF*).
 - Select the text or image you want to make into a link.

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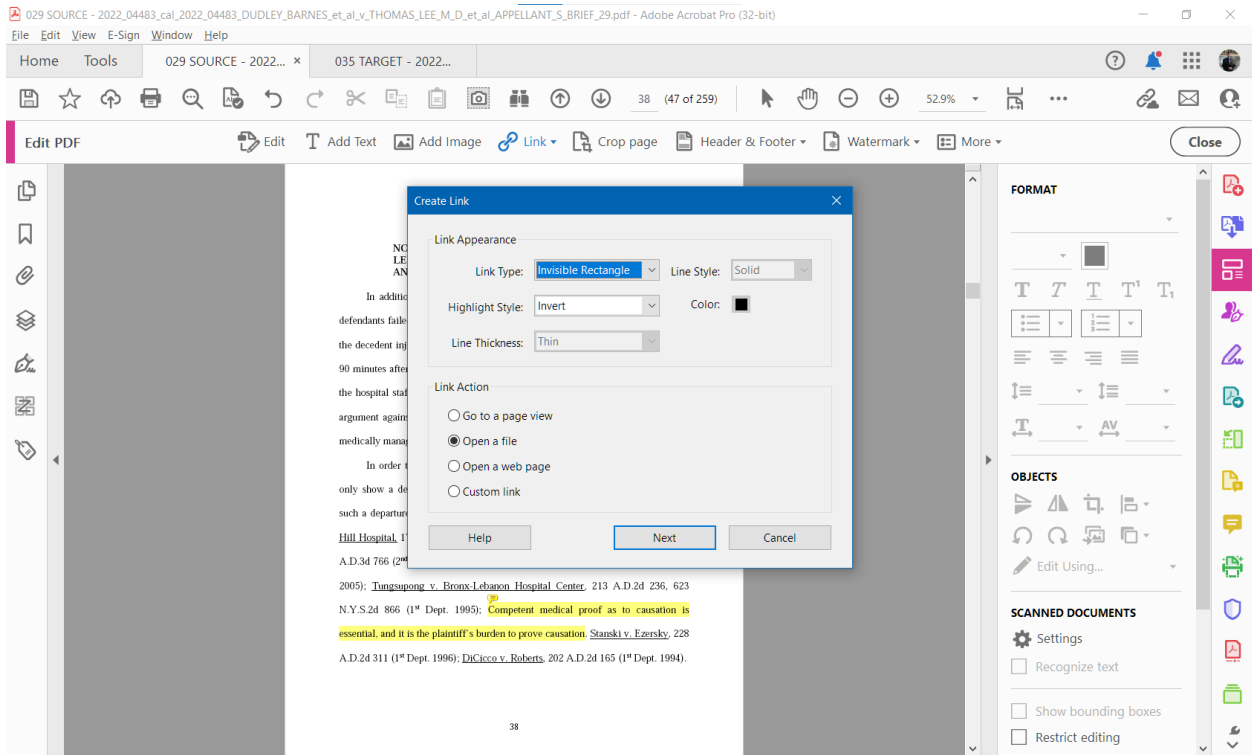


- Click the *Link* tool (it looks like a chain link). You can find it by searching for it. Then, click “Add/Edit Web or Document Link.”



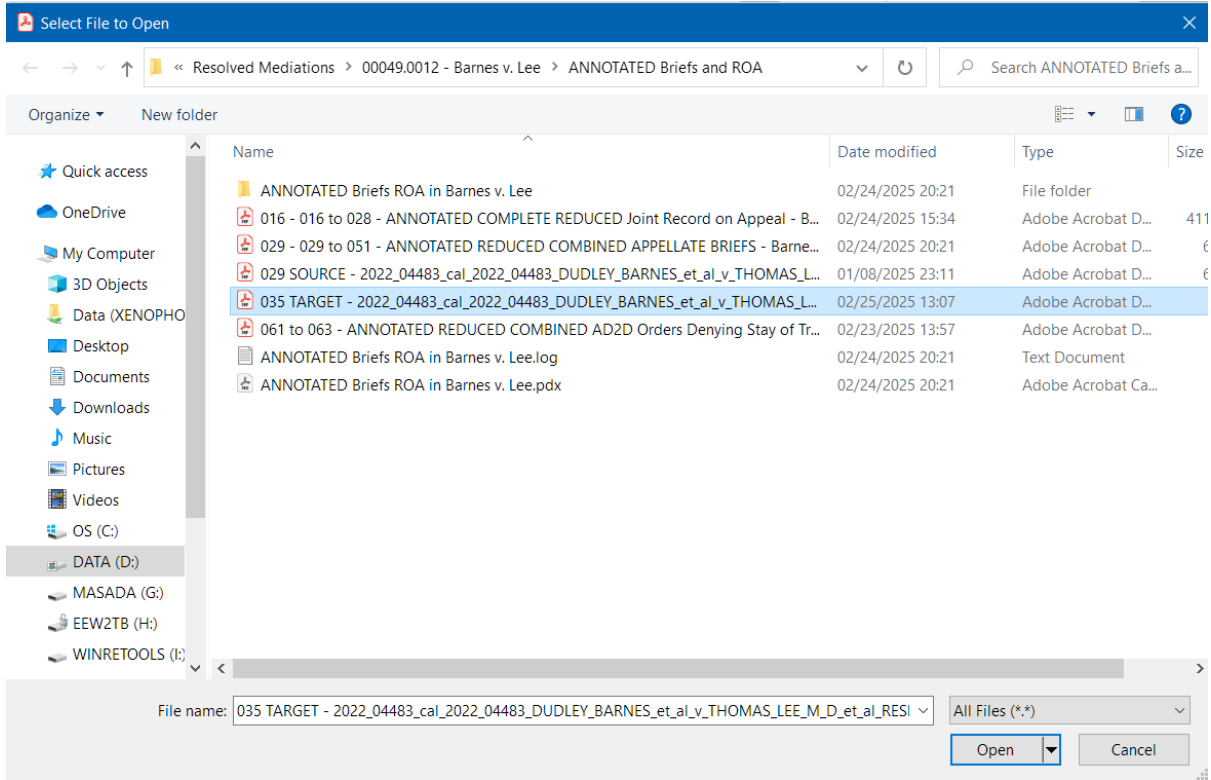
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4. **Set the Link Action:** The *Create Link* dialog box will appear. This is where you specify where the link should take the user.
 - o **"Open a file":** Select this option.

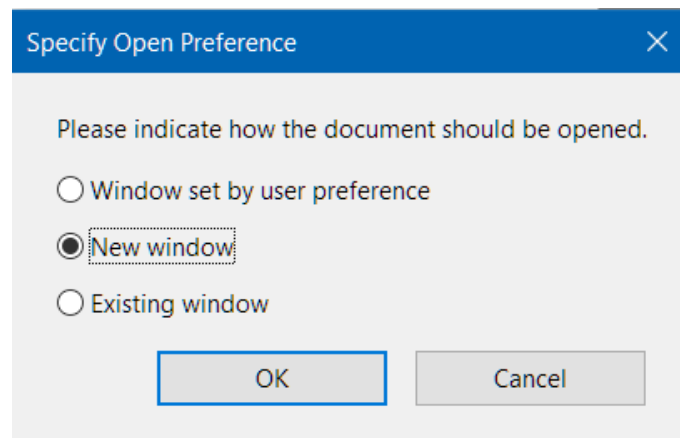


5. **Browse for the Target PDF:** Click the *Browse...* button and locate the PDF file you prepared in Part 1 (your target document).

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6. **Set the Link to Open in a New Window:** In the “Specify Open Preference” dialog box that results from clicking on “Open,” select “New Window” from the options presented to avoid inadvertent closure of the source file window.

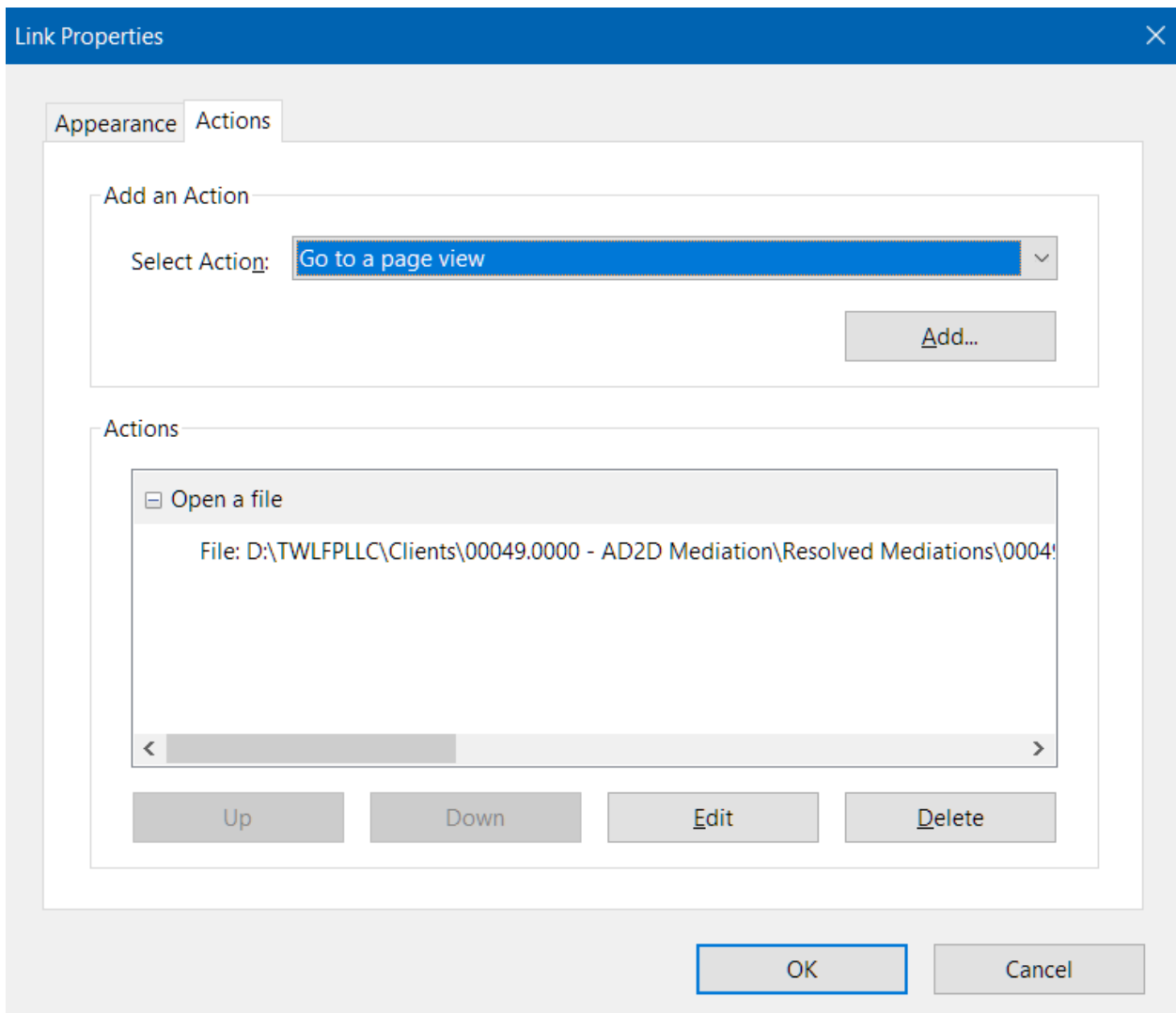


7. **Edit the Link to Specify the Destination (Crucial Step):** Click out of *Edit* so that you see a hand with an index finger cursor over the newly-created link. Then, right-click on the link and select “Edit Link” to set the link to the specific destination

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that you created. Otherwise, you will simply open the target file at Page 1 (but if you're fine with starting at Page 1 and navigating to the appropriate destination in the target file using the "Destinations" menu, then you can stop here and proceed to "Step 8: Test the Hyperlink" below).

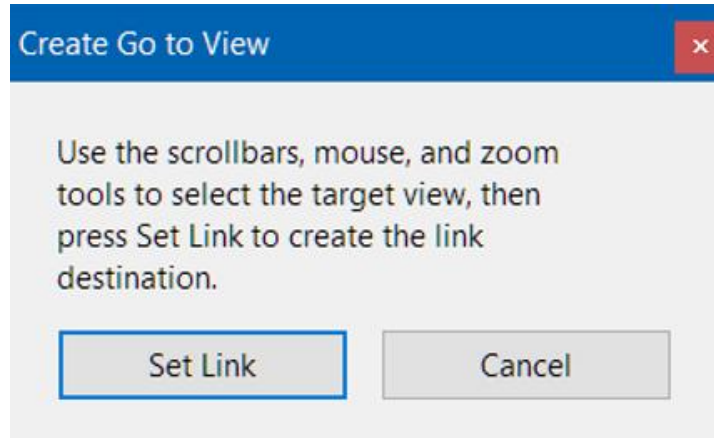
Proceed to select the "Actions" tab, then select "Go to a page view," and then click the "Add..." button.



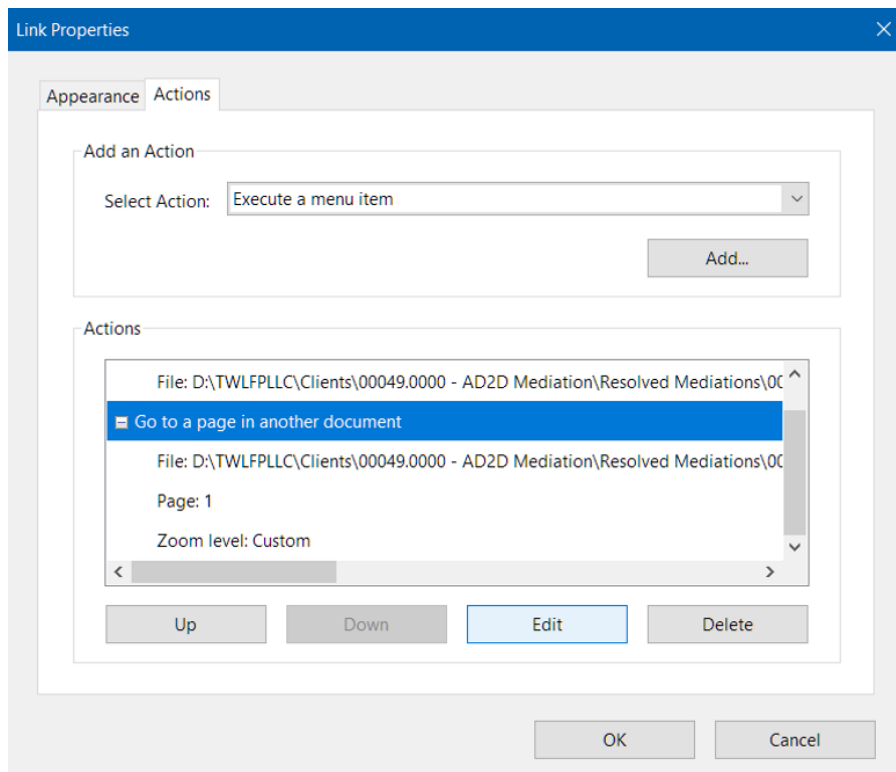
A "Create Go to View" window will pop up.

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IMPORTANT: Before clicking “Set Link,” open the target document to the place where you want the link to be placed, and then click the “Set Link” option.



Next, right-click on the link and select “Edit Link.” Then, click on the “Actions” tab in the resulting “Link Properties” dialog box, click on “Go to a page in another document,” and then click the “Edit” option.



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- **Use Named Destination (Recommended):** In the resulting “Go to a page in another document” window, select the appropriate named destination you created earlier. This is the most reliable method!

Go to a page in another document

Target Document

File: ...\\035 TARGET - 2022_04483_cal_202: Browse...

Open in: New window

Options

Use Page Number

Page: Cover of 52

Zoom: Custom

Use Named Destination

Name: KirkSpockMcCoy Browse...

OK Cancel

- **Use Page Number (Less Reliable):** If you didn't create named destinations, you can enter the page number of the page of the target document that you wish to link to in the "Page" field.

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8. **Test the Hyperlink:** Switch to *Hand Tool* (the hand icon) and click on the hyperlink you just created. It should open the target PDF, and **IF YOU HAVE FOLLOWED ALL THE STEPS ABOVE**, it should also take you directly to the specified named destination or page. Otherwise, the link will take you to Page 1 of the target document or the last page that you viewed in the target document before you closed it.

Troubleshooting:

- **Link not working?** Double-check the path to the target PDF. If you move either file, the link might break. Named destinations are much more resistant to this.
- **Target document opens to the first page, not the destination?** You probably didn't select the named destination or page number correctly in the *Create Link* dialog. Go back and edit the link.
- **Named destinations not showing up?** Make sure you saved the target PDF *after* creating the named destinations. Also, double-check the names you gave them, for they are case-sensitive.

By following these steps carefully, you can create robust and reliable hyperlinks between PDF documents in Adobe Acrobat DC Pro. Remember that named destinations are the key to a smooth and maintainable linking workflow.

SECTION IV: CREATING AND USING A CATALOG/INDEX FOR PROXIMITY SEARCHING IN ADOBE ACROBAT PRO

Gemini Advanced Prompt: Please provide a heavily-detailed step-by-step guide for building a searchable index from multiple PDF files contained in one directory and conducting proximity searches using Adobe Acrobat DC Pro.

Introductory Note: While Adobe Acrobat Pro DC doesn't offer *proximity search* in the same way dedicated search engines do, it *does* offer robust indexing and search capabilities, including searching within a specified number of words. This portion of the guide will walk you through creating a searchable PDF index and performing searches, including simulating proximity searches.

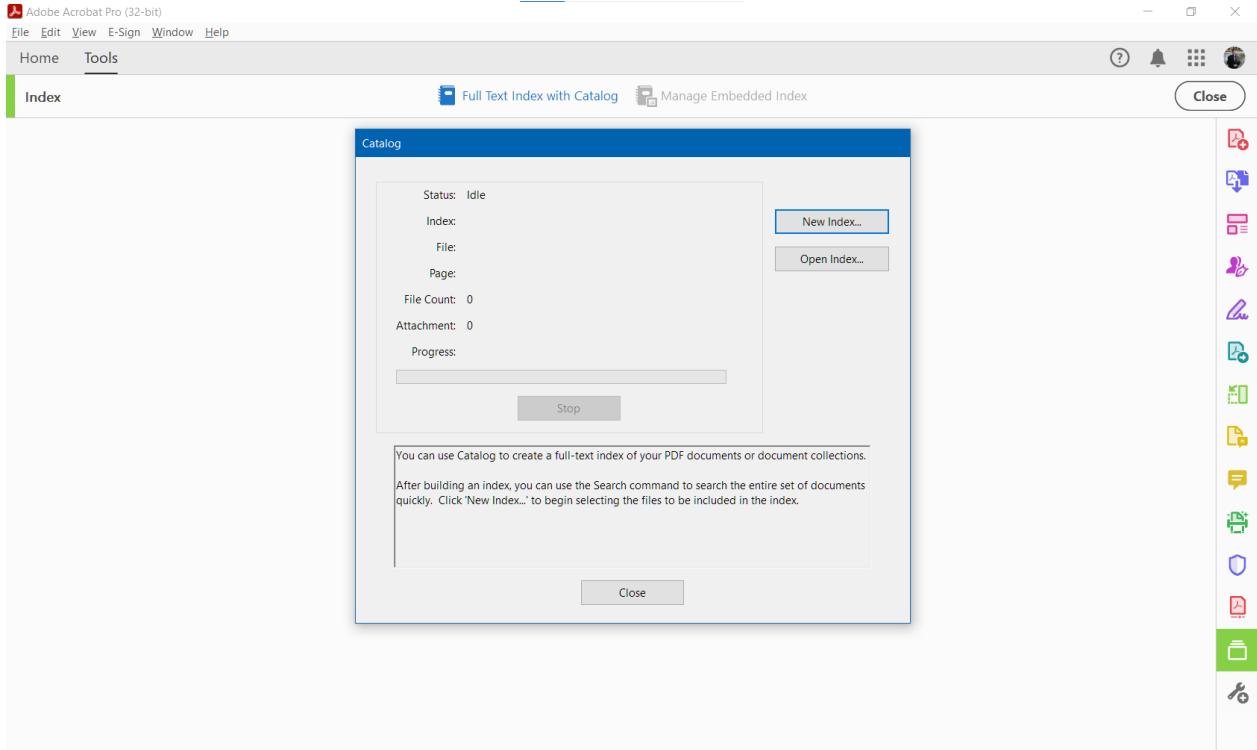
Part 1: Preparing Your PDFs

1. **Consistent Formatting (Highly Recommended):** For best results, ensure your PDFs have consistent formatting. Optical Character Recognition (“OCR”) should be used if your PDFs are image-based (scanned documents). Acrobat Pro DC has built-in OCR. Go to "Tools" > "Scan & OCR" > "Enhance Scans" to OCR your PDFs. Consistent fonts, heading styles, and overall structure will improve indexing accuracy. See also <https://experienceleague.adobe.com/en/docs/document-cloud-learn/acrobat-learning/getting-started/scan-and-ocr> (last updated Sept. 30, 2024).
2. **Organize Your PDFs:** Place all the PDFs you want to include in the index into a single directory. This makes the indexing process much easier.

Part 2: Creating the PDF Index (Catalog)

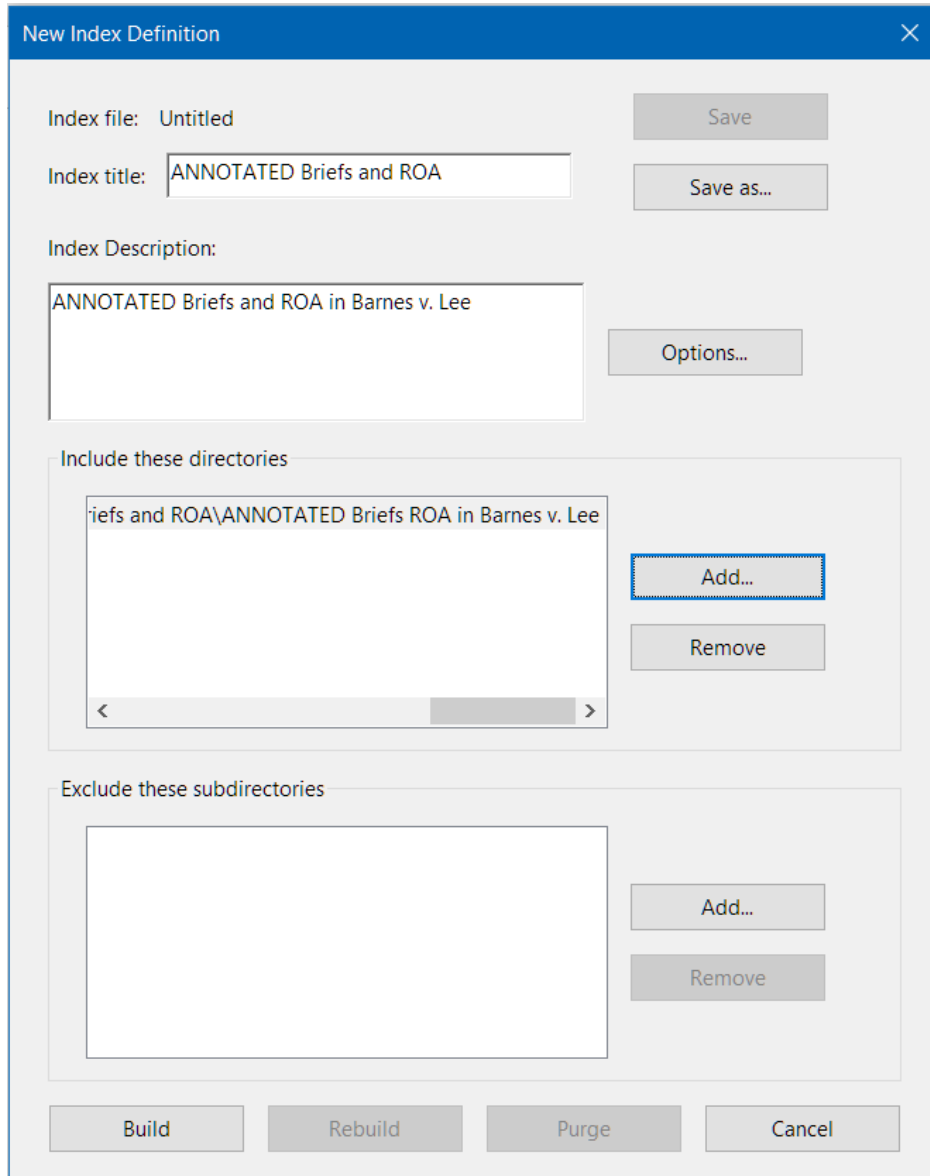
1. **Open Acrobat Pro DC:** Launch the application.
2. **Access the Catalog Feature:** Go to "Tools" > "Index" > "Full Text Index with Catalog."

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3. **Name Your Index:** In the "Index Name" field, give your index a descriptive name (e.g., "ProjectX_Documents").
4. **Add the Directory:** Click the "Add..." button. Choose "Add Folder..." and navigate to the directory containing your PDFs. Select the folder (a/k/a directory) and click "OK."

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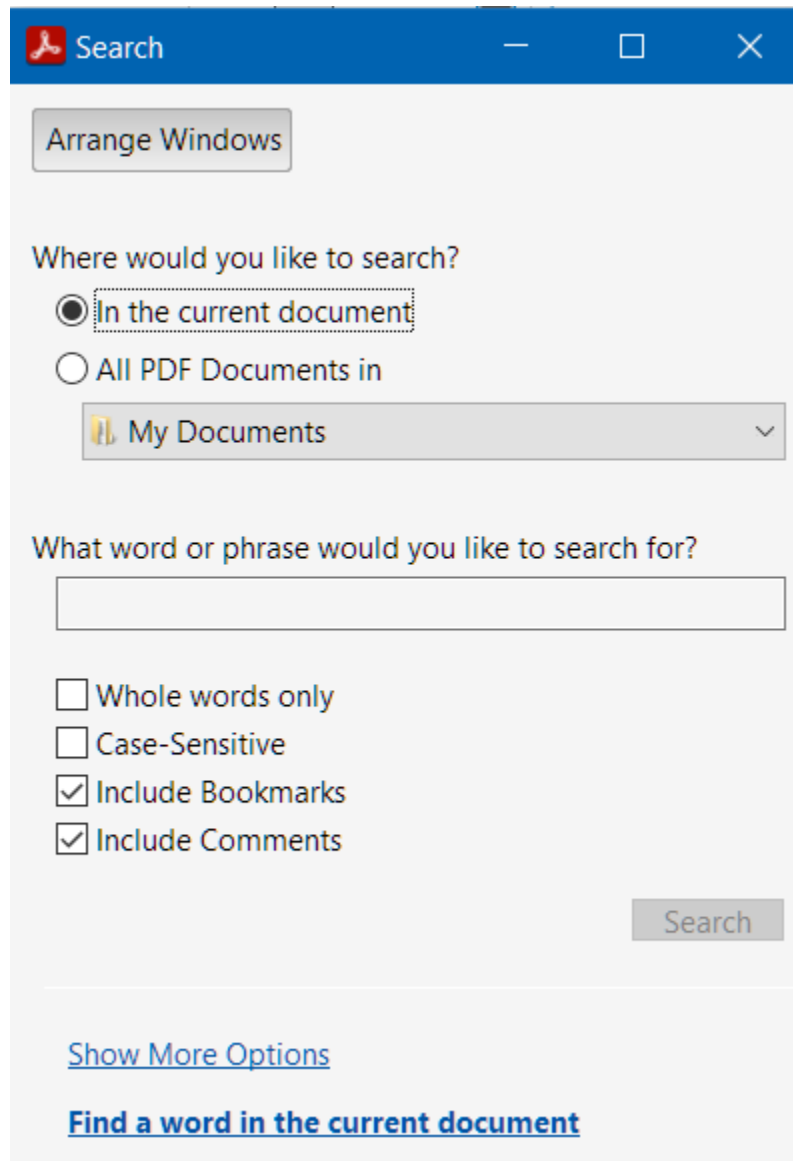


5. **Create the Index:** Click the "Build" button. Acrobat will now analyze all your PDFs and build the index. This process can take a while, depending on the number and size of your files.
6. **Save the Index:** Acrobat will prompt you to save the index file (with a *.pdx extension). Keep this file in a safe place. It needs to be accessible whenever you want to search your PDF collection. It's best to keep it in the same directory as the PDFs.

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Part 3: Searching the Index

1. **Open Any PDF in the Indexed Directory:** You don't need to open all the PDFs. Opening any PDF within the indexed directory is sufficient.
2. **Use the Advanced Search:** Press Ctrl+F (Windows) or Cmd+F (Mac) to open the search pane. Click the gear icon next to the search box and select "Open Full Acrobat Search..." Then, in the "Search" window, click on the "Show More Options" link.



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3. **Specify the Index:** In the "Where would you like to search?" section, make sure the correct index is selected. If it isn't, click "Select Index..." and locate the .pdx file you saved earlier. Then, select the "Match All of the words" option in the "Return results containing:" menu, and make sure that the "Proximity" checkbox is selected.

Search

Arrange Windows

Look In:
Currently Selected Indexes

What word or phrase would you like to search for?

Return results containing:
Match All of the words

Use these additional criteria:
 Is exactly

Whole words only
 Case-Sensitive
 Proximity
 Stemming
 Include Bookmarks
 Include Comments
 Include Attachments

Search

[Show Fewer Options](#)
[Find a word in the current document](#)

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4. **Conduct Your Search:** Enter your search terms in the "What word or phrase would you like to search for?" field.
5. **Reviewing Results:** The search results will list the documents containing your search terms. Click on a result to open the PDF and see the highlighted search terms in context.

Key Considerations and Limitations:

- **Index Updates:** If you add, delete, or modify PDFs in the indexed directory, you **MUST UPDATE (A/K/A REBUILD) THE INDEX**. Go to "Tools" > "Index" > "Full Text Index with Catalog" > "Open Index...." and then select the *.pdx file previously created. Then, select the "Rebuild" option at the bottom of the dialog box.

The screenshot shows the "Index Definition" dialog box. It has a blue title bar with a close button. The main area is white with a light gray border. At the top, there are two rows of input fields: "Index file:" with the value "D:\ANNOTATED Briefs ROA in Barnes v. Lee.pdx" and a "Save" button; "Index title:" with the value "ANNOTATED Briefs ROA Index Folder" and a "Save as..." button. Below that is the "Index Description:" section with a text area containing "ANNOTATED Briefs and Record on Appeal in Barnes v. Lee - AD2D MCAMP" and an "Options..." button. The "Include these directories:" section has a list box containing "D:\TWLFPLLC\Clients\00049.0000 - AD2D Mediation\Re" and "Add..." and "Remove" buttons. The "Exclude these subdirectories:" section has an empty list box and "Add..." and "Remove" buttons. At the bottom, there are four buttons: "Build", "Rebuild" (highlighted in blue), "Purge", and "Cancel".

- **Performance:** Large indexes can sometimes be slow. Optimize your index settings and consider excluding stop words to improve performance.

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- **Optical Character Recognition (“OCR”) Issues:** As noted in the Introduction, while it is unlikely that PDFs originating from an official court e-filing system such as NYSCEF would need to be “OCRred” again, should the need arise, a straightforward guide to executing the OCR process is available from Adobe at the following website: <https://experienceleague.adobe.com/en/docs/document-cloud-learn/acrobat-learning/getting-started/scan-and-ocr> (last updated Sept. 30, 2024).