



Using an Adobe® PDF Portfolio as a Pleadings Database

All law firms need to collect, search, view, store, and print their pleading files, either on paper or electronically. Not all firms, however, have practice management software such as Time Matters™, litigation database software such as AD Summation or Concordance®, or a document management system such as Worldox® or DOCS Open®. Those who do not, often store their pleadings in case folders on a centralized hard drive or network, and manually navigate or use the Windows search feature to locate files they need. This proves to be a reasonable, inexpensive way to maintain pleadings.

But what if you want to search more than one case folder at once? What if you want hyperlinked, in-context search hits to make finding what you're looking for more efficient? What if you want to annotate your pleadings to summarize and extract key information? What if you want a single, electronic container to hold organized copies of all your case pleadings?

Then you could look at using Adobe Acrobat 9 Pro as an efficient method to organize and locate case files. By creating PDF Portfolios you can maintain and access all your case pleadings in a single file with the ability to print them individually or en masse. Files in the portfolio can be in native format (Word or WordPerfect, etc.) or converted to PDF. Native files will be text searchable, and if you have scanned documents to PDF, you can OCR them in Acrobat to make them text searchable too. (Note, however, that OCRing is not perfect. Even if the OCRing accuracy rate is 98% or better, you could still have a significant number of inaccuracies that may affect your search results). You can also imbed an index in the Portfolio to make searching faster.

If you use the standard Grid with File Preview layout, the title of your pleadings will appear in a list on the left hand side of

your screen with a preview image of the selected pleading (PDFs only, not native files such as Word or WordPerfect documents) appearing on the right.



Image 1: Grid View with File Preview (List)

When you run a search on one document or all the documents within the Portfolio, a window with the hyperlinked, in-context search results appears on your screen. You can then click on any of the search results to jump to its location within the document. Using the Comments tool you can add notes or excerpts of the document regarding case law cited, arguments made, discovery responses (e.g., admitted, denied, etc.), areas for follow-up in future briefs, etc., then print summaries of those comments to use as reference sheets during discovery.

From my experience, the wheel is invented over and over again when it comes to writing briefs. Make it easier to reuse research and arguments from other briefs by searching across multiple Portfolios for several different matters to find if anyone in your firm (or anyone opposite your firm) has argued a certain position or analyzed a certain case.

With all your pleadings in a single PDF container it is easy to put the whole organized set of pleadings on a CD or thumb drive to reference when you are out of the office. And, Acrobat 9 features can be extended so that users with the free Adobe Reader can still use the commenting features; in other words, not every user has

to have a license for the professional version to take advantage of pleading Portfolios.

Of course, using pleading Portfolios in Adobe® Acrobat 9® Pro is not the only way to manage your pleadings files, nor is it necessarily the best way for your practice. It is, however, a simple method which may be especially useful for those without specialized litigation software or for those who want to organize a tidy package of pleadings to send to co-counsel or a client. Acrobat 9 has its benefits and its shortcomings. It is not a true database and not all information is easily exported to manipulate outside the program. But Acrobat has been tailoring its programs to entice the legal community by adding features such as OCRing, Bates numbering, commenting / collaborating, securing, and tracking. PDF Portfolios are simply another one of those features that can be exploited to meet your needs.

If you would like to learn more or if you would like to buy licenses for your firm, Litgistix offers Acrobat 9 Pro at wholesale prices and provides individual or group training. From pleadings management to document production and collaboration, you may find Adobe Acrobat 9 Pro to be a good program to have in your software suite.

Reagan DeWitt-Henderson, ACP

LITGISTIX

*Advanced Certified Paralegal &
Litigation Support Analyst*

Office: (918) 585-1131

reagan@litgistix.com or

litsupport@litgistix.com

(Reagan is an advanced certified trial practice paralegal with over 10 years experience. She has focused on complex business litigation and medical malpractice defense, while specializing in the efficient use of litigation support software).