



Acrobat X Action: Document Numbering

Automate Numbering of Related Documents



Place document numbers and page numbers on legal exhibits, sets of accounting working papers, appendices and more.

Acrobat X Pro introduced Actions, a powerful way to standardize processes by automating routine, multistep tasks. Since Actions may be extended via JavaScript, there are any number of additional operations which can benefit from automation.

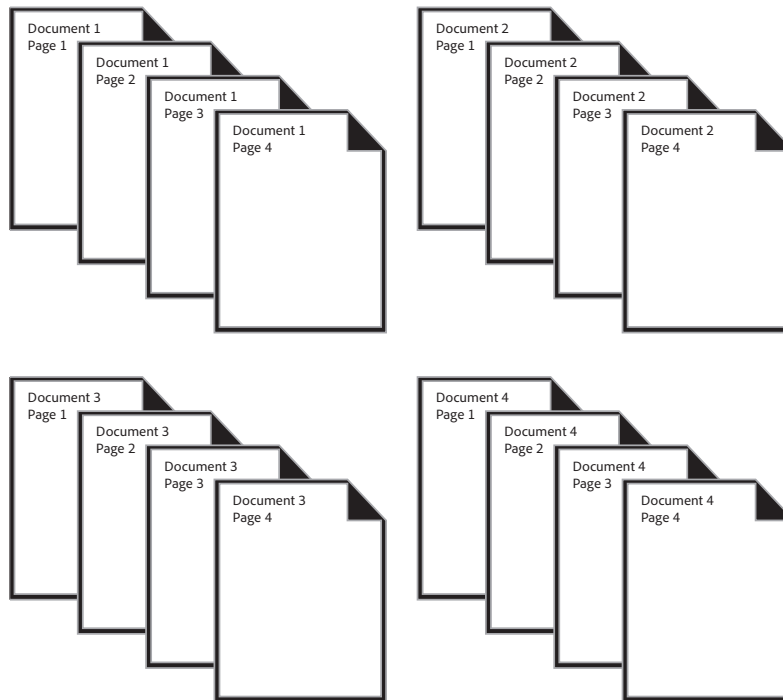
The Acrobat X Document Numbering Action allows you to stamp two separate numbering items at the same time— the document number and the page number.

Visit the Adobe Acrobat User Community for more Acrobat Actions

<http://acrobatusers.com/actions-exchange>

Actions are compatible with:

- Adobe Acrobat X Pro
- Adobe Acrobat X Pro Suite



The Document Number represents the order of the document set such as an Exhibit number. The page number denotes the page number of an individual document.

Document Numbers are added as Text Box annotation in the PDF. The Action provides options to leave the annotations locked or unlocked, or to flatten them into the page content.

The documents are "stamped" with a standard Acrobat text box annotation. These annotations may be left editable, may be locked or may be "flattened" into the main text layer of the document.

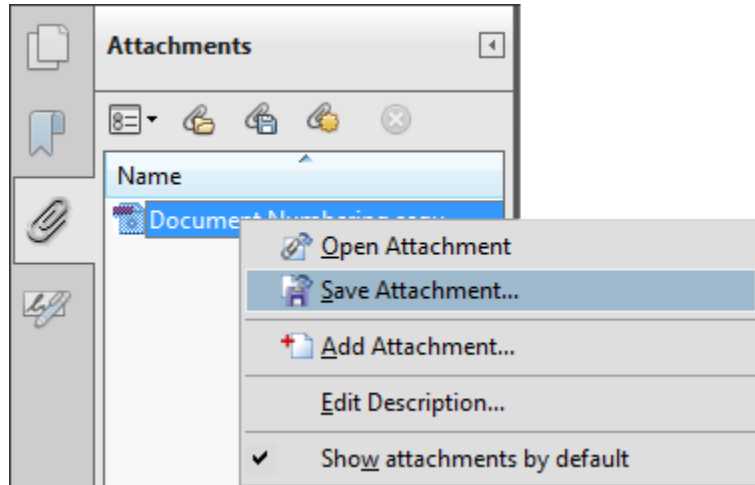
Who benefits from document numbering?

- Lawyers who need to number exhibits for cases
- Accountants that label working papers during an audit
- Scientists who need to stamp reports as part of a laboratory notebook

Extracting the Document Numbering Action

Before installing the Action, you will need to extract it from this document.

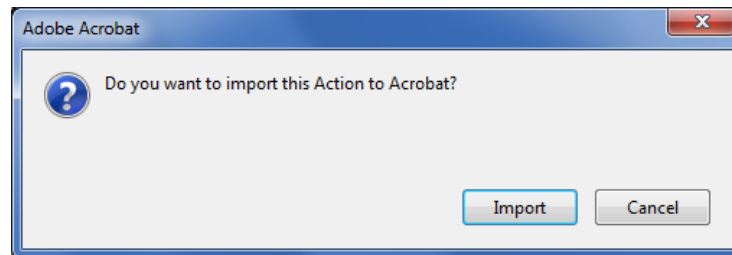
1. In the Attachments Panel at left, select **Document Numbering.sequ**
2. Right-click and choose *Save Attachment* to your desktop or other convenient location



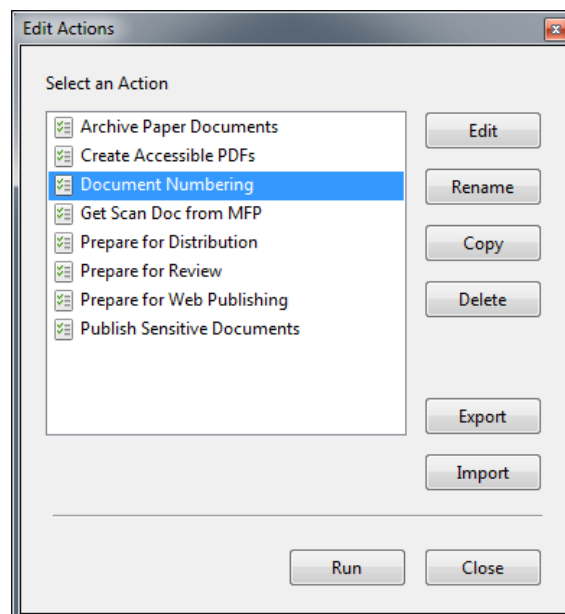
Installing the Document Numbering Action

To install the Document Numbering Action

1. Locate the **Document Numbering.sequ** file on your desktop (or other location)
2. Double-click the file and click the Import button.



The *Edit Actions* window will open and display the newly imported Action:



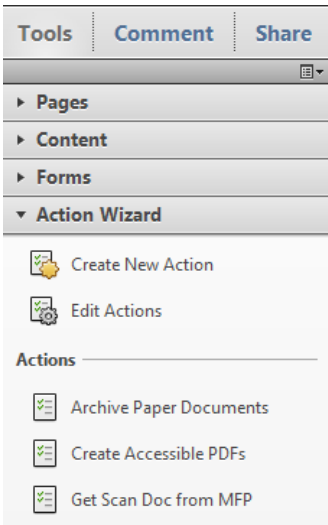
Using the Document Numbering Action

Before using the Document Numbering Action, locate the files you wish to number. It's easiest if all of the files are in the same folder.

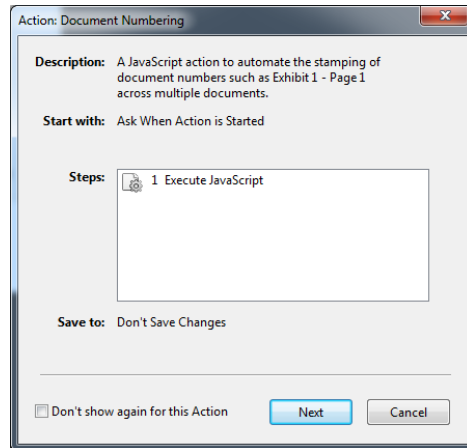
Run the Document Numbering Action

To run the Document Numbering Action, choose File> Action Wizard> Document Numbering or open the Tools Pane and choose the Action Wizard to locate the Document Numbering Action.

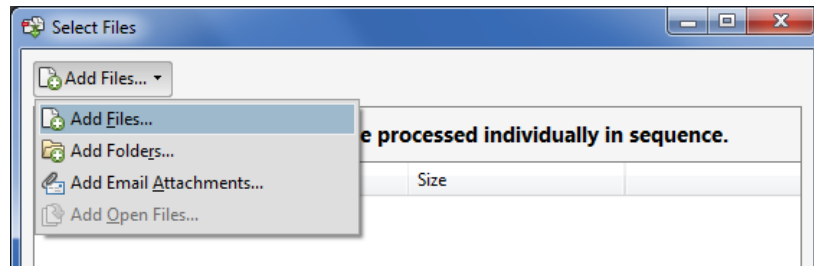
Acrobat will ask you to confirm that you wish to run the Action. Click the **Next** button.



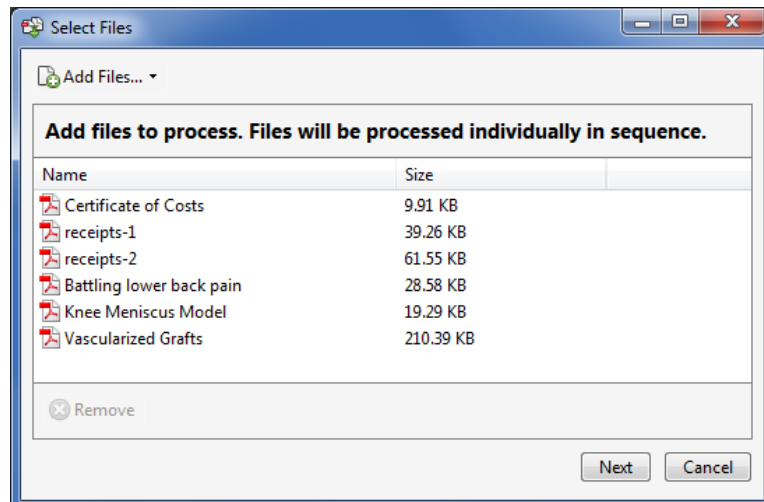
An easy way to access Actions is through the Action Wizard Tool Panel



The *Select Files* Window will open:



Click the **Add Files** button and choose the first file you wish to add to the list. Repeat as necessary for additional documents then click the **Next** button.



The Select Files window does not allow you to reorder documents, so you must add files in the desired order.

NOTE: Although you may any supported file type such as PowerPoint, TIFF, Word, Excel, PowerPoint, etc., the Document Numbering Action cannot rename non-PDFs as part of the Action.

Document Numbering Options

The Document Numbering Action offers many options for applying numbers to your document set.

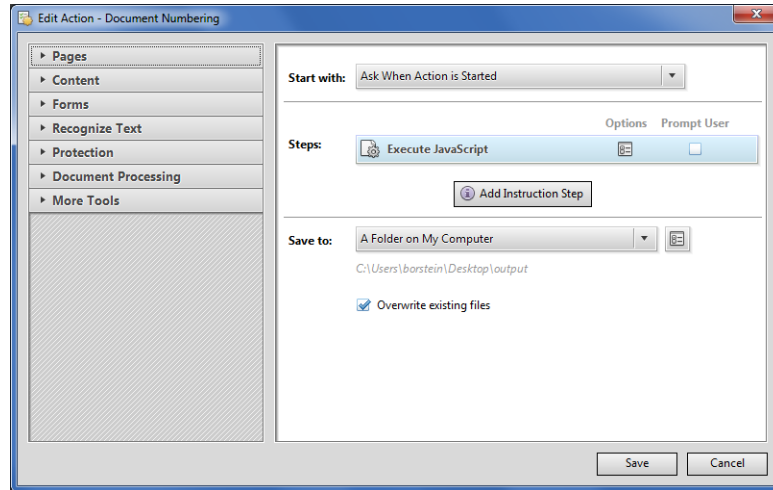
The screenshot shows the 'Document Numbering Info' dialog box. At the top, it says 'Current File: Event Security.pdf' and 'Version 1.3 - 11/2/2010'. The 'Position' section has radio buttons for Left, Center, Right (selected), and Bottom, with 'Margin (inches): 0.5' for both Right and Bottom. The 'Label Format' section has a 'Label Type' dropdown set to 'Exhibit 1-Line', a 'Background' dropdown set to 'Transparent', and an 'Example' field showing 'Exhibit 1 - Page 1'. Below that, 'Label Prefix' is 'Exhibit', 'Initial Value' is '1', and 'Prefix' is '- Page'. There are checkboxes for 'Include Doc#' and 'Include Page #'. A note states: 'The Document Number is added to pages as a text annotation. If locked, the user cannot move or edit it. If flattened it becomes part of the regular form content.' The 'Page range' section has radio buttons for All (selected), Current (Applies only to Open Document), and From: 1 To: 1 of (13). The 'Save Options' section has a checkbox for 'Save File' (checked), a 'Prefix' field, and radio buttons for 'Doc Number as:' set to 'Prefix'. At the bottom, there are buttons for 'Apply Label', 'Skip this Doc', and 'Stop Action', and a 'File Name' field showing 'Exhibit 1-Event Security.pdf'. Red circles with numbers 1 through 10 are overlaid on the dialog to indicate key settings.

1. Set page position for the text box containing the document number and page number
2. Choose from pre-built label formats (you can change them)
3. Choose a background color such as transparent (default), blue, green, grey, white or yellow
4. Preview of the document number as it might appear on the page
5. Set the prefix for the document number (e.g. Document, Exhibit, Appendix) and set the document number for the text box label placed on the document. The Action will increment this number automatically. Note that the Action will "remember" the initial value until you quit Acrobat. This can be useful when you are adding to your document set.
6. The Action can leave the text box added to the page locked, unlocked or flattened into the page content.
 - Unlocked, you can move or change the document number if needed
 - Locked - No changes allowed. May be removed using Remove Hidden Information if necessary
 - Flattened - Permanently moved to the main document layer and not editable
7. Set the Page Range. Defaults to All Pages.
8. Enable *Save File* if you would like the document Action to rename files to include the document number, e.g. rename e.g. *abcsyz.pdf* to *Exhibit 1 - abcsyz.pdf* Note: Adding prefix and suffix will not take place for non-PDF documents used as a source. This option should not be used when non-PDF files are processed. Modify the save option of the Action instead.
9. Set the Prefix, Postfix and separator text which will be used to generate a new file name. A preview of the new filename is available so you can check your settings.
10. Click the **Apply Label** button to place the label on the document. Repeat for additional documents.

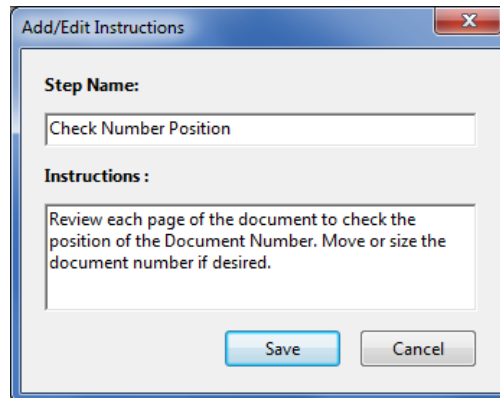
Editing the Document Numbering Action

You can edit the Document Numbering Action to include additional functions: For example, you may wish to add a step to allow you to check the position of the document number before flattening the number into the main document layer. Here's how:

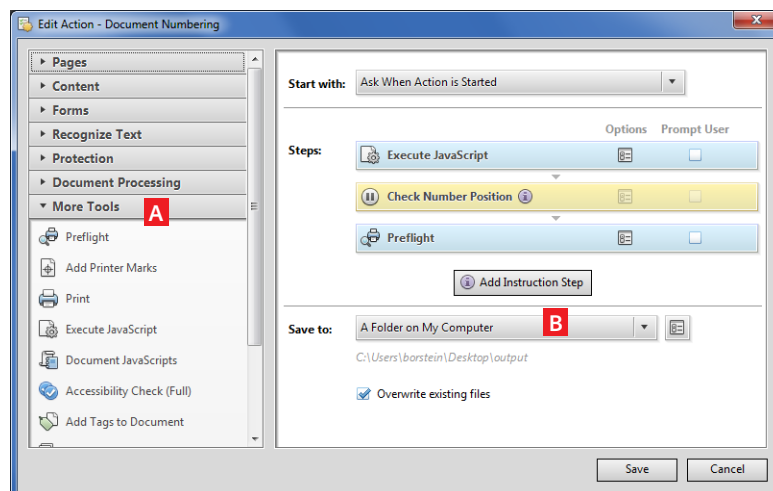
1. Choose File> Action Wizard> Edit Actions or choose the Action Wizard panel and choose Edit Actions
2. Select the Document Numbering Action and click the **Copy** button
3. The Edit Action window appears:



4. Click the **Add Instruction Step** button. Add some instructions for this manual step in the process. Click the **Save** button.



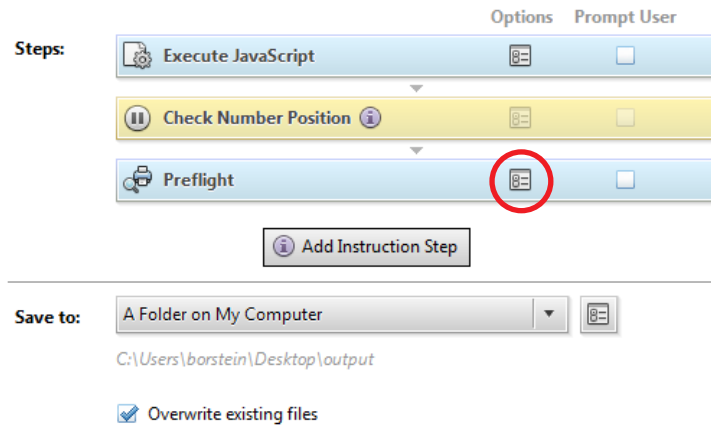
5. In the Edit Action window, open the More Tools panel and select Preflight.



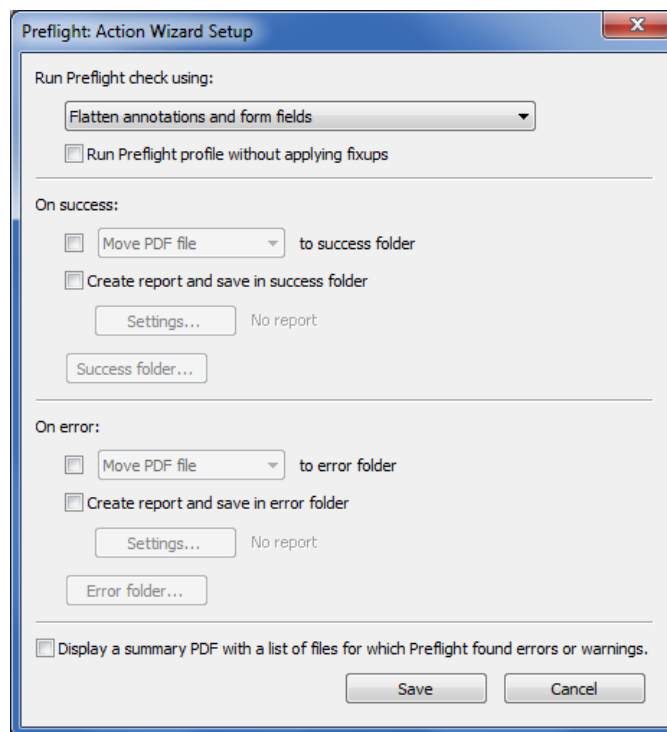
A. Preflight

B. Choose *Folder on my Computer* and locate a folder to received the processed files

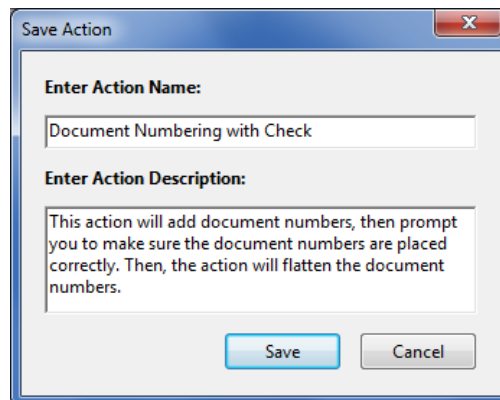
6. Click the **Configure Task** button for the Preflight step:



7. The Preflight window opens. Choose *Flatten Annotations and Form Fields* from the list at the top of the window. Click the **Save** button.



8. Click **Save** again and enter a description for the revised Action.



The Document Numbering Action was created by WindJack Solutions, Inc.

Our mission is to make Acrobat and PDF easier to use and more accessible for everyone. We specialize in all the programming activities surrounding Acrobat and PDF, including plug-ins, JavaScript automation, form scripting, and server scripting. We have been at it since 1997 and we accomplish our mission by mentoring, writing articles, teaching classes, creating educational materials, lecturing at conferences and of course by creating our line of software products and services for assisting document designers and developers to get the most out of PDF. We are currently delivering our accumulated knowledge of PDF and Acrobat development to users through our membership website at <http://www.pdfscripting.com>



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