



Acrobat X Action: Quick Review

Quickly determine which documents require further review



Automate the evaluation of documents by quickly sorting a large group of files into those you wish to investigate for further review and those that may be discarded.

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 Create Quick Review Action provides a process to help you evaluate a large number documents by:

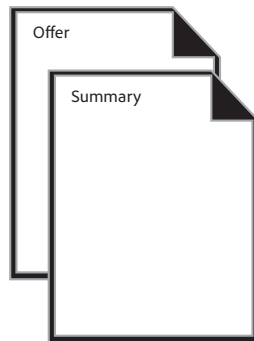
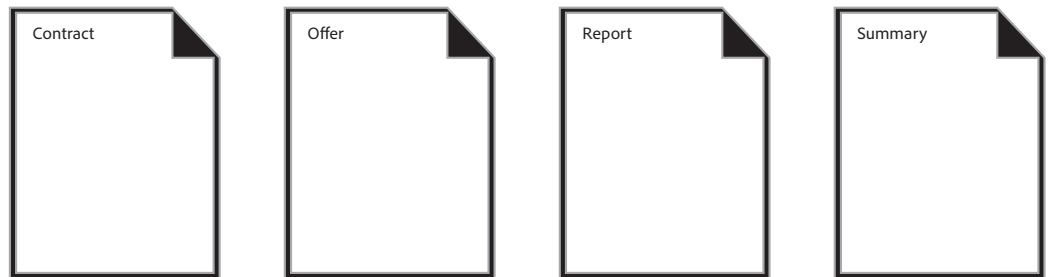
- Displaying each document in turn and allowing the user to keep or reject the document.
- Copying documents to a "Keep" or "Reject" Folder

Visit the Adobe Acrobat User Community for more Acrobat Actions

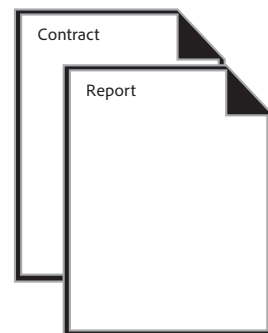
<http://acrobatusers.com/actions-exchange>

Actions are compatible with:

- Adobe Acrobat X Pro
- Adobe Acrobat X Pro Suite



Keep



Reject

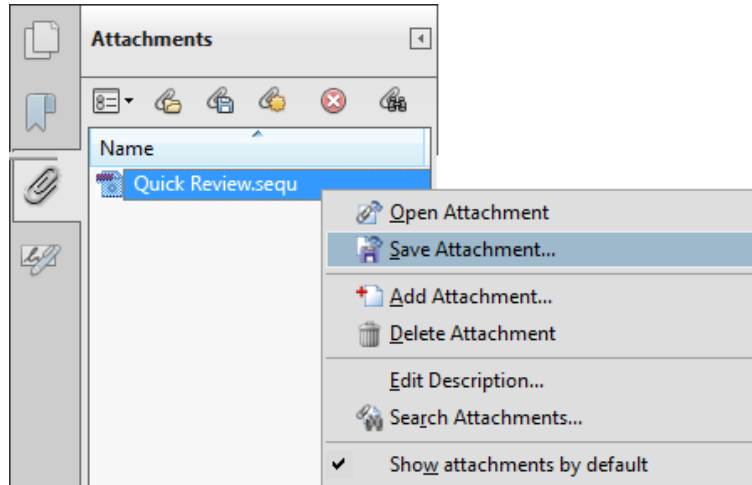
Who benefits from quickly sorting documents into "keep" and "discard" folders?

- Professors who are evaluating many PDFs as part of a research project
- Regulatory professionals who need to quickly evaluate safety reports
- Attorneys and paralegals reviewing case data
- Life Science professionals reviewing lab instrument data to report anomalies
- Anyone who needs to analyze a large number of documents and select the most important documents

Extracting the Create Quick Review Action

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

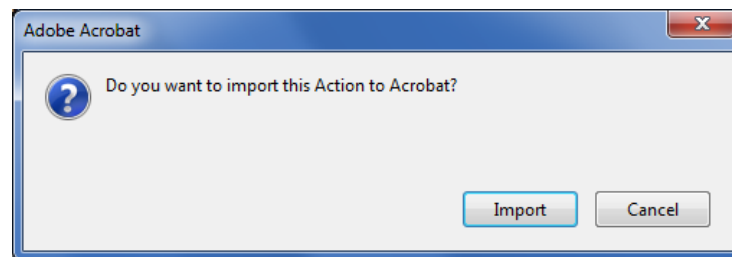
1. In the Attachments Panel at left, select **Create Bookmark Report.sequ**
2. Right-click and choose *Save Attachment* to your desktop or other convenient location



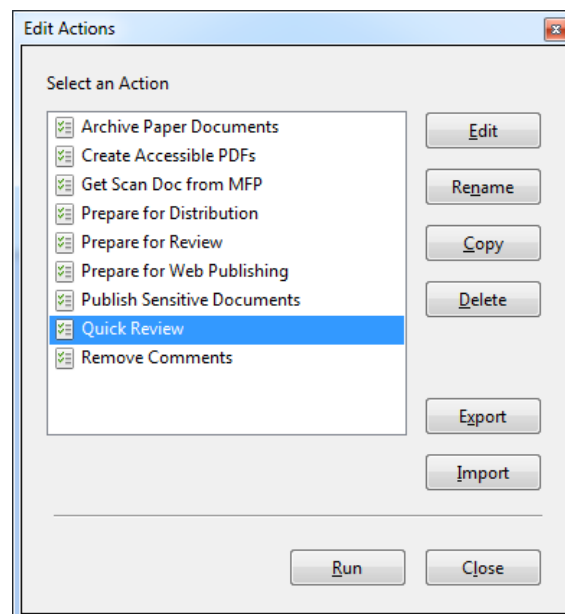
Installing the Create Quick Review Action

To install the Create Quick Review Action

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

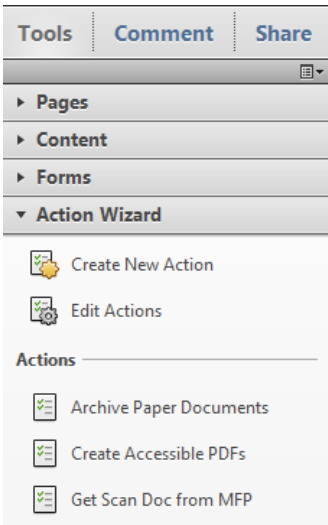


The *Edit Actions* window will open and display the newly imported Action:



Using the Create Quick Review Action

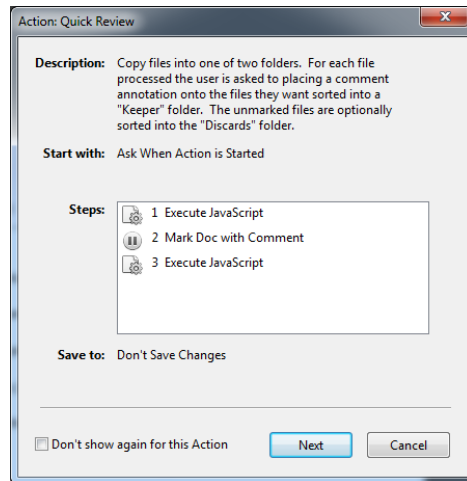
Before using the Create Quick Review Action, locate the files you wish to process. It's easiest if all of the files are in the same folder.



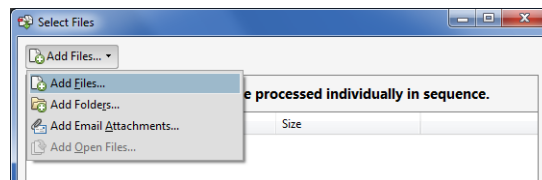
An easy way to access Actions is through the Action Wizard Tool Pane

Run the Create Quick Review Action

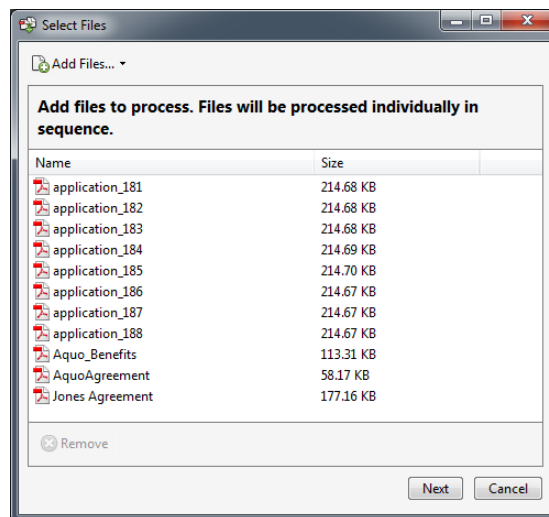
1. Open the Tools Pane and choose the Action Wizard and click the Quick Review Action
— OR —
Choose File> Action Wizard> Quick Review
2. Acrobat will ask you to confirm that you wish to run the Action.
Click the **Next** button.



3. The *Select Files* Window will open:



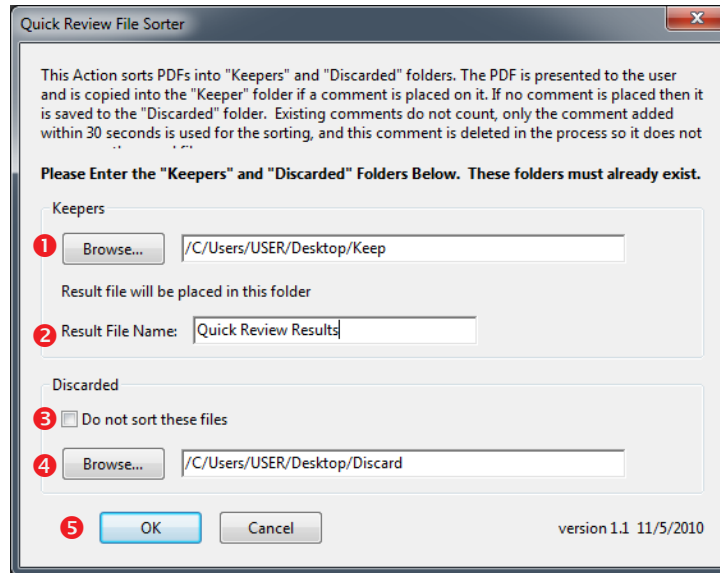
4. Click the **Add Files** or **Add Folders** button and locate the files you wish to process.
When finished, click the **Next** button.



Quick Review Action Options

Select the options for processing the files you wish to review:

The settings for the Quick Review Report Action are "sticky" during the same Acrobat session. If you quit Acrobat, the settings will be cleared.



1. Click the **Browse** button and locate the folder where you wish to copy the documents you wish to keep.
2. Set name of the Quick Review Results Report
3. Enable Do not sort these files if you do not want to copy the rejected files
4. Click the **Browse** button and locate the folder where you wish to copy the documents you wish to reject.
5. Click the **OK** button to process documents.

Marking the Files while Action is Running

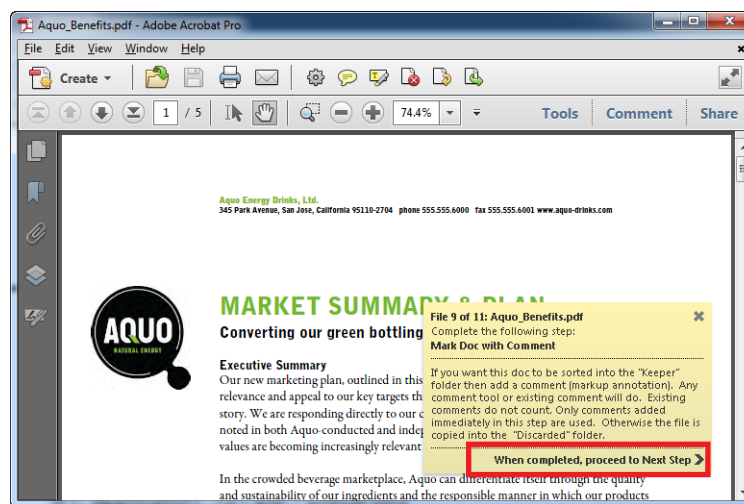
When the Action is run, you'll be presented with each document in turn.

To "keep" the document, add any type of comment to the document, then click the *Next Step* text in the yellow guide box.

To reject the document, simply click the *Next Step* text without adding a comment.

Add a Sticky Note using the Keyboard
Simply tap:

CTRL-6 (Windows)
CMD-6 (Macintosh)



Working with the Summary Document

The Summary Document offers a report of the document processing completed by the Action.

A sample report is shown below.

Password Protected Files

Encrypted documents which require a password to open them will be rejected by Acrobat. If you know the password to your documents, you can change a preference to allow access to Actions. Choose Edit>Preferences and choose the Actions category. Change the Security Method to *Password*. Acrobat will ask you for the Open password each time you run an Action.

Files Processed for Quick Review Sort

(Subsequent Quick Review Actions will add to this file, it must be closed to start a new Quick Review)

Name: Quick Review Results
Date: Tue Nov 23, 2010
Time: 03:11 pm
Keeper Folder: /C:/Users/borstein/Desktop/Keep/
Discarded Folder: /C:/Users/borstein/Desktop/Discard

Files Processed: 11

#1: application_181.pdf - Keeper
#2: application_182.pdf - Discarded
#3: application_183.pdf - Discarded
#4: application_184.pdf - Keeper
#5: application_185.pdf - Discarded
#6: application_186.pdf - Keeper
#7: application_187.pdf - Keeper
#8: application_188.pdf - Discarded
#9: Aquo_Benefits.pdf - Keeper
#10: AquoAgreement.pdf - Keeper
#11: Jones Agreement.pdf - Keeper

Files Processed

This area is a scrolling text field. Scroll the field to discover which files were designated as "Keeper" or "Discarded".

Questions and Answers

What's the fastest way to add a comment so that the Action makes my file a Keeper?

Type CTRL-6 (Windows) or CMD-6 (Macintosh) to quickly add a Sticky Note.

How does the Action process files that already have comments?

The comments in the file are preserved. Only a comment added within 30 seconds of processing the file are used to deliver the file to the "keep" or "reject" folders.

Does the Action add my note to the document? I don't want that to happen.

No, the Action deletes the comment you make on the file.

What happens to my original documents? Are they deleted?

No, the Action copies files to "keep" and "reject" folders.



The Quick Review 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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