STAFF ATTORNEYS TIPS FOR MASTERING NUANCE

Here are some tips about useful features of the pdf software Nuance that will make it easier to review electronic records. We intend to update and improve these tips based on your feedback. If requested, we will hold training sessions, and tech support will come work with you one-on-one. Please call the IT help line whenever you want assistance: 404-657-5423. Finally, we will supplement this handout with other training materials as we get them.

First, two key suggestions when reviewing electronic records:

1. Be sure that you are using the right software program. These instructions are written for Nuance, which has a purple icon. If another program opens when you click a pdf file, contact IT so they can set your computer to open Nuance automatically. Or you can tell your computer to use Nuance to open a signle file as follows.

    a. Right-click the filename and select **Open With**.

    b. Select **Nuance Power PDF Advanced** to use Nuance to open the file.

2. We recommend that you download the record files to your computer so you can edit and manipulate them, add notes, and save your annotations.

Next, Nuance includes some useful features that should help you review electronic records. Instructions for these features follow.

- How to **search** for words or phrases within a document;

- How to "**page jump**";

- How to **Bookmark** a page or text and how to delete the Bookmark;

- How to create a **second-level Bookmark**;

- How to create a **Table of Contents** of your Bookmarks;

- How to create **Notes** (kind of like electronic sticky notes);

- How to add **attachments**;

- How to change your **view** of the document; and

- How to **convert** a pdf file to a WordPerfect document (maybe to insert long quotes from the record).

Searching for Words or Phrases within a PDF

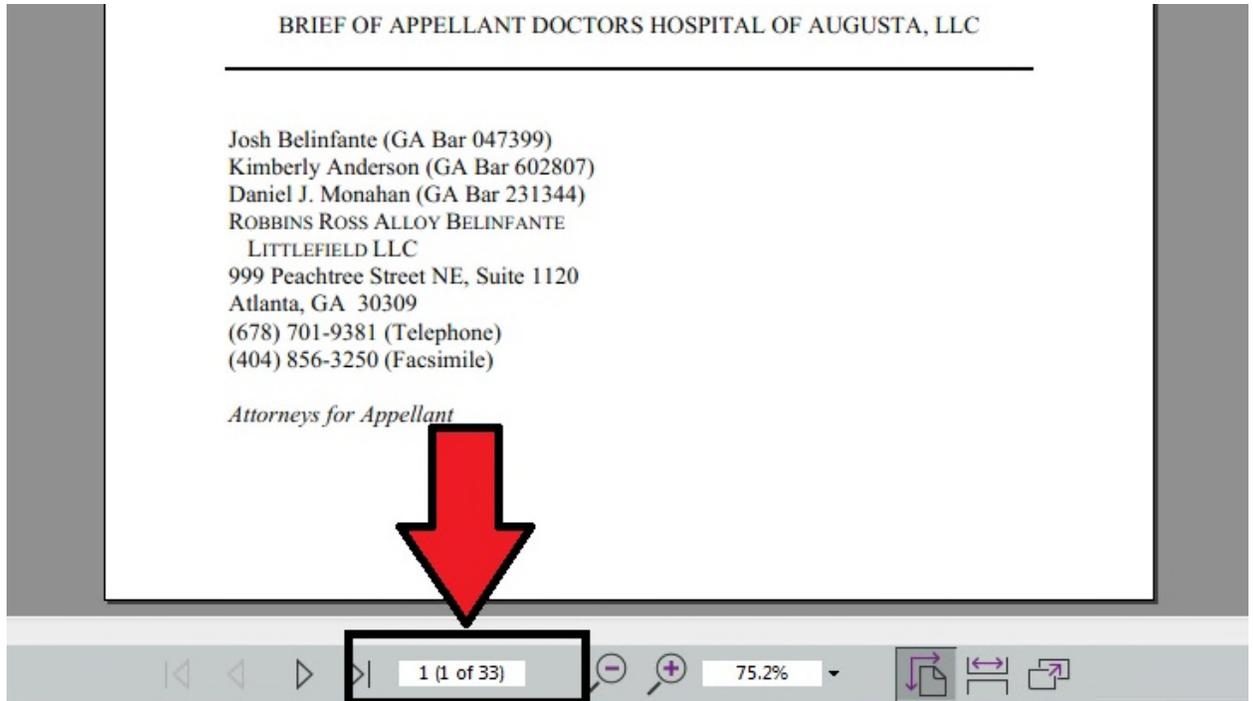1. Click **Home** at the top of the screen, then click on **Search** at the top right of the ribbon.
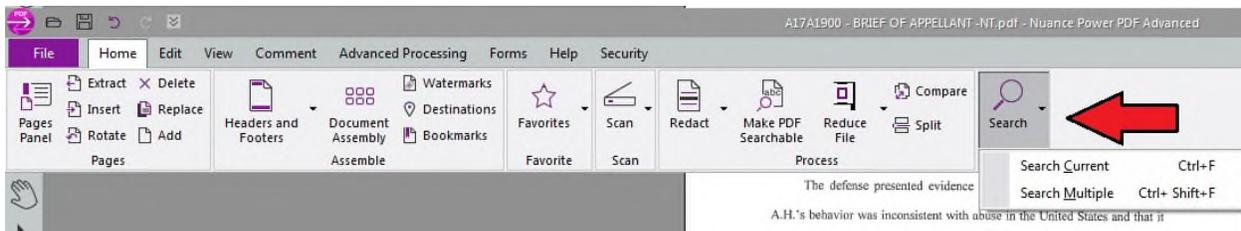
2. Select either **Search Current** or **Search Multiple**.

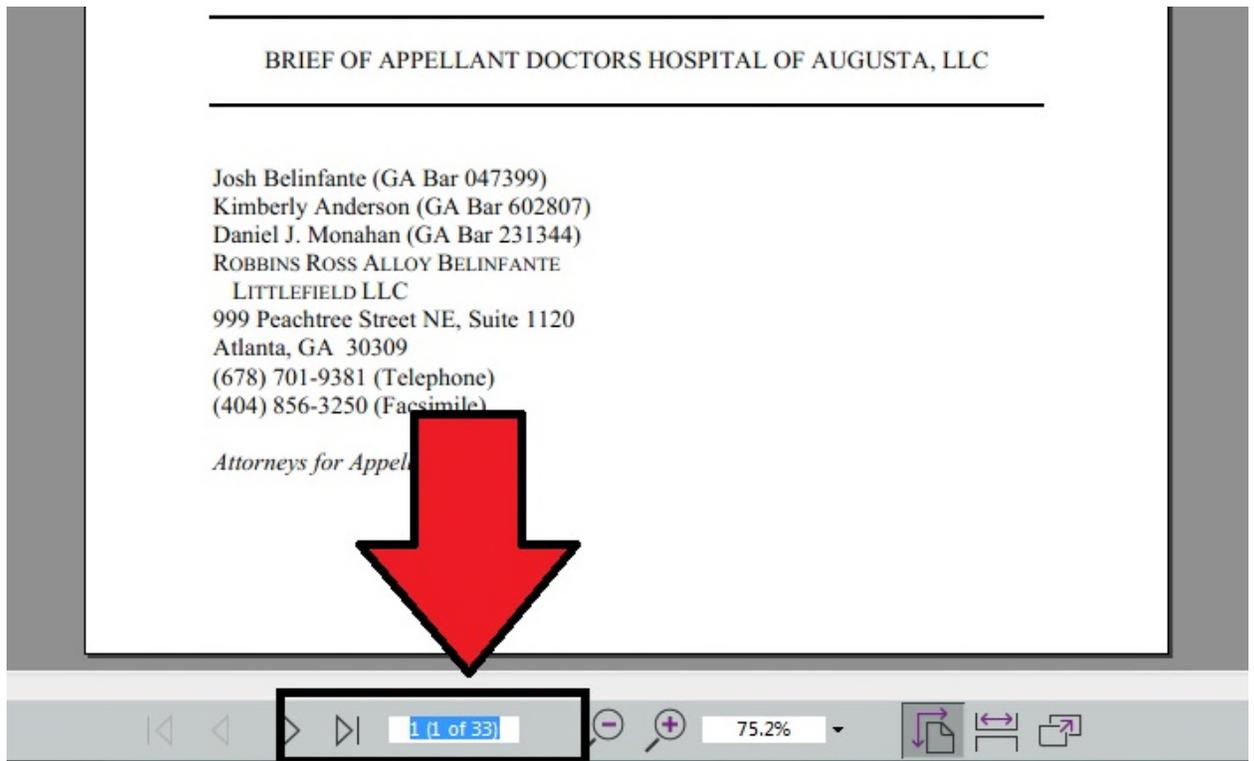3. Type in the word or phrase you want to find within the document.

4. Press Enter.

Note: **Search Multiple** returns a list of all occurrences of the word or phrase throughout the entire document.

"Page Jumping"

1. To jump to a specific page without scrolling, find the page box at the bottom of your

   screen.

2. Click and highlight the box.

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3. Type the page number and hit enter.

Bookmarks

In Nuance PDF Advanced, you can bookmark pages and see your set of bookmarks in a separate panel onscreen if you choose.
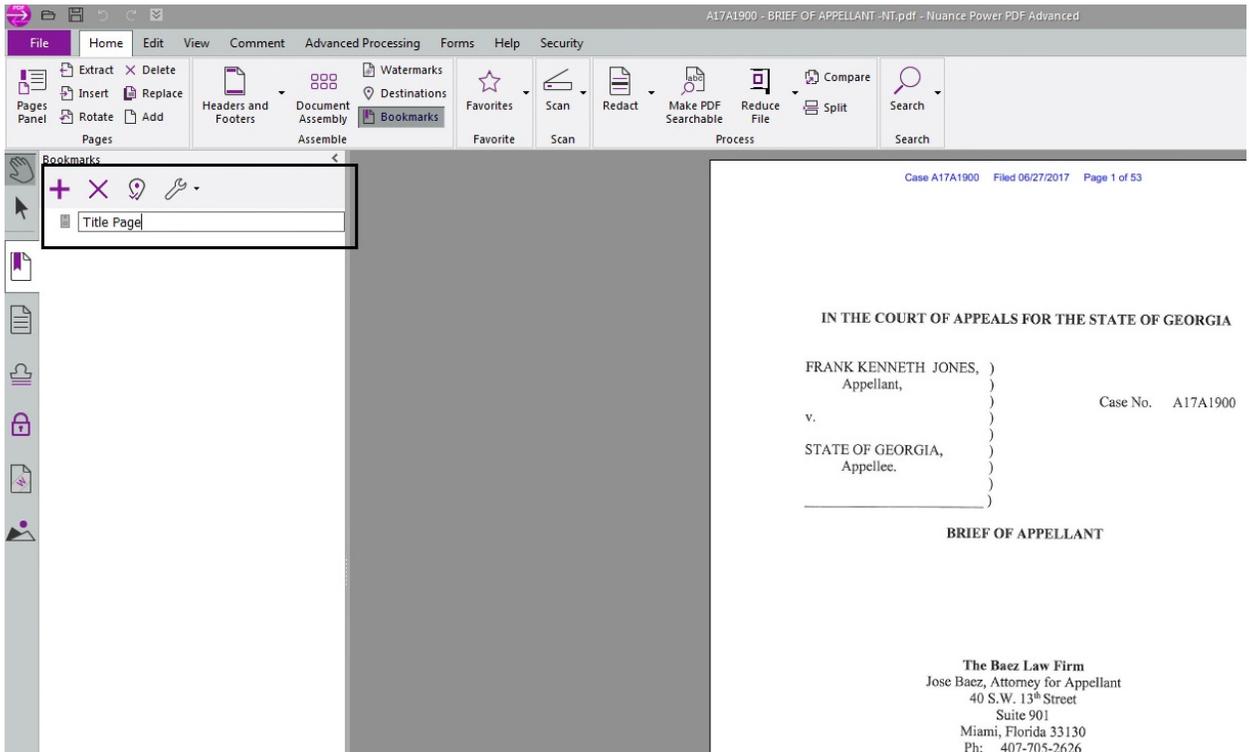
1. To bookmark a page, first click on the **Home** tab at the top of the page.

2. Click on the **Bookmarks** icon from the left-side panel (the panel bar).
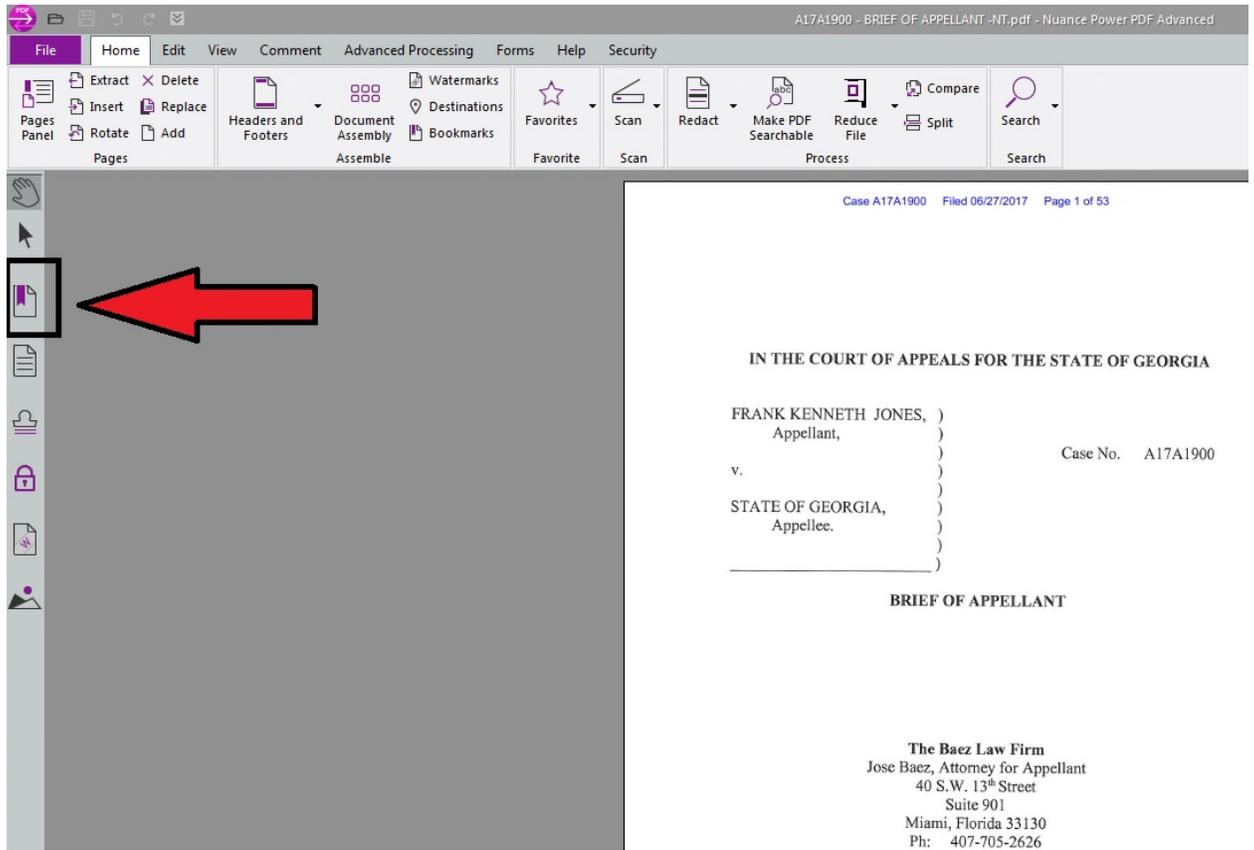
3. Click the **plus sign** – the New Bookmarks tool – at the top of the Bookmarks panel.
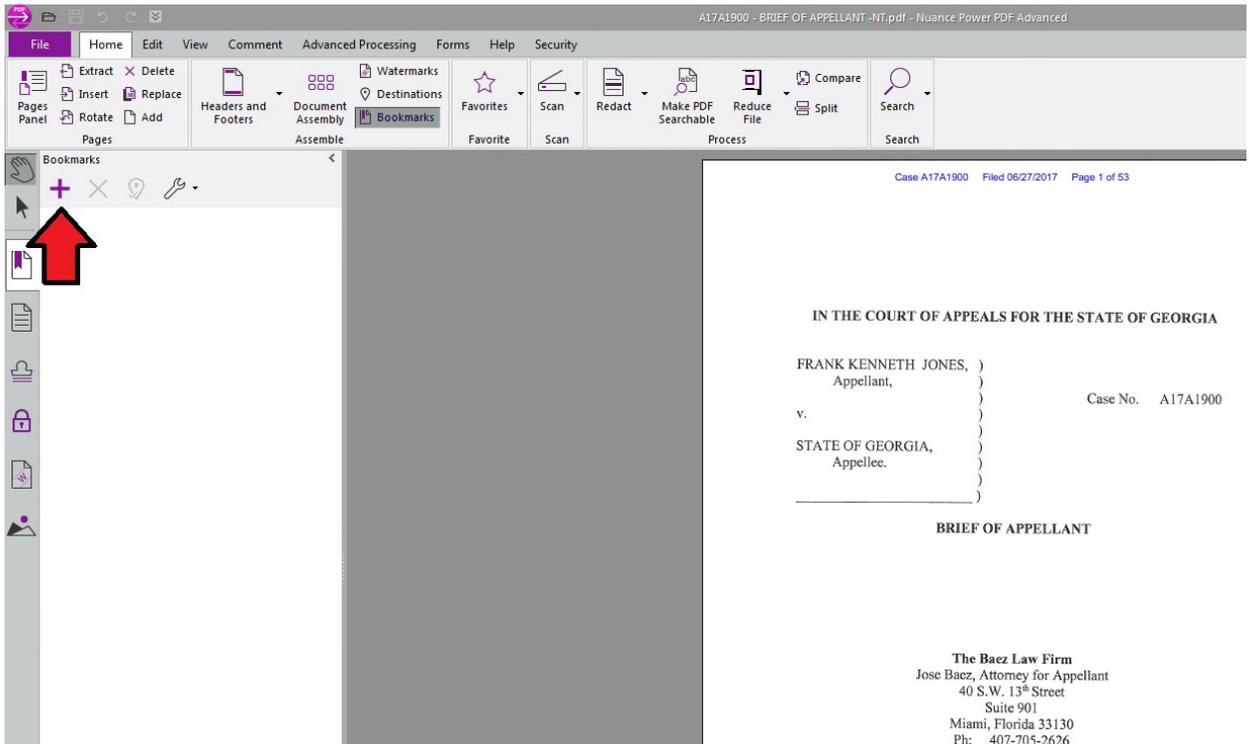

4. Type a name for the bookmark, such as Title Page, and hit Enter on your keyboard.

5. Repeat the process to build up a set of bookmarks.

## To bookmark specific text on a page

1. Click the arrow above the Bookmark icon – the **Select tool** – on the Panel bar. Then click at the beginning of the text you want to bookmark. Hold the mouse button and drag the tool across the text until it is highlighted.
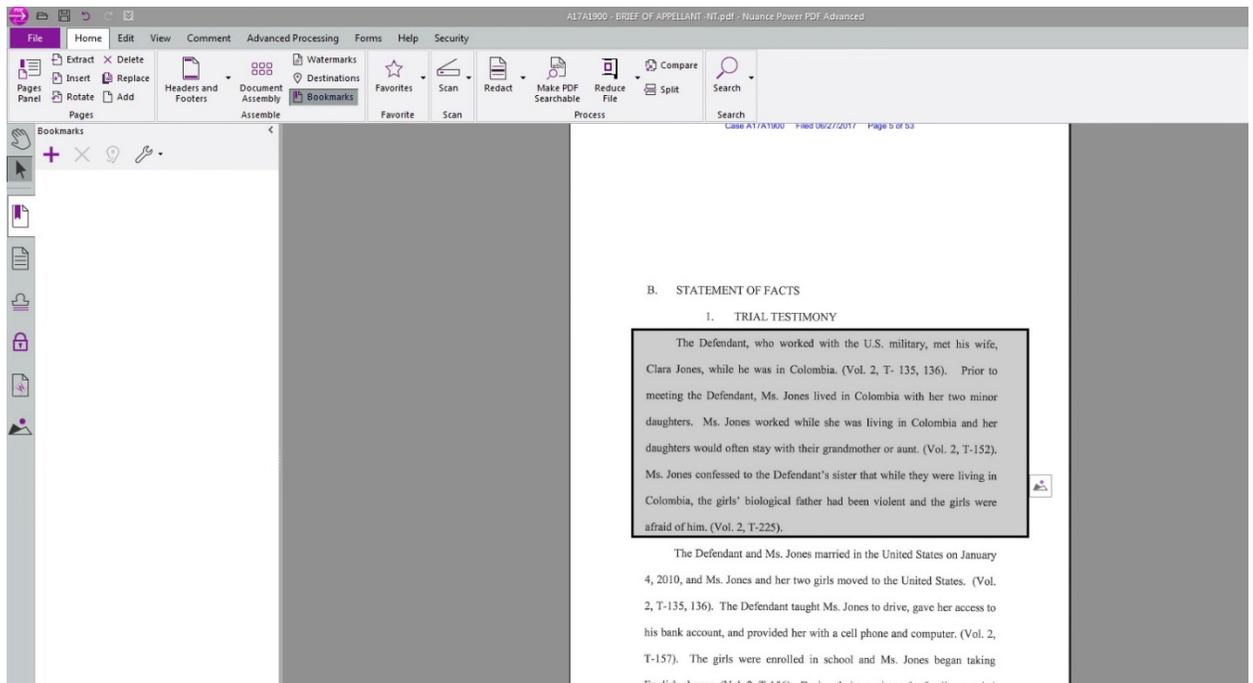
2. Press Ctrl B. A blank bookmark box will open.

3. Type the name of your bookmark and hit Enter. The bookmark will appear in the **Bookmark Panel**, as it does if you simply bookmark the entire page.

To delete a bookmark

Select a bookmark and click the **X** in the Bookmark bar – the **Delete Bookm**ark tool – or right-

click the bookmark and choose **Delete Bookmark(s)** from the shortcut menu.
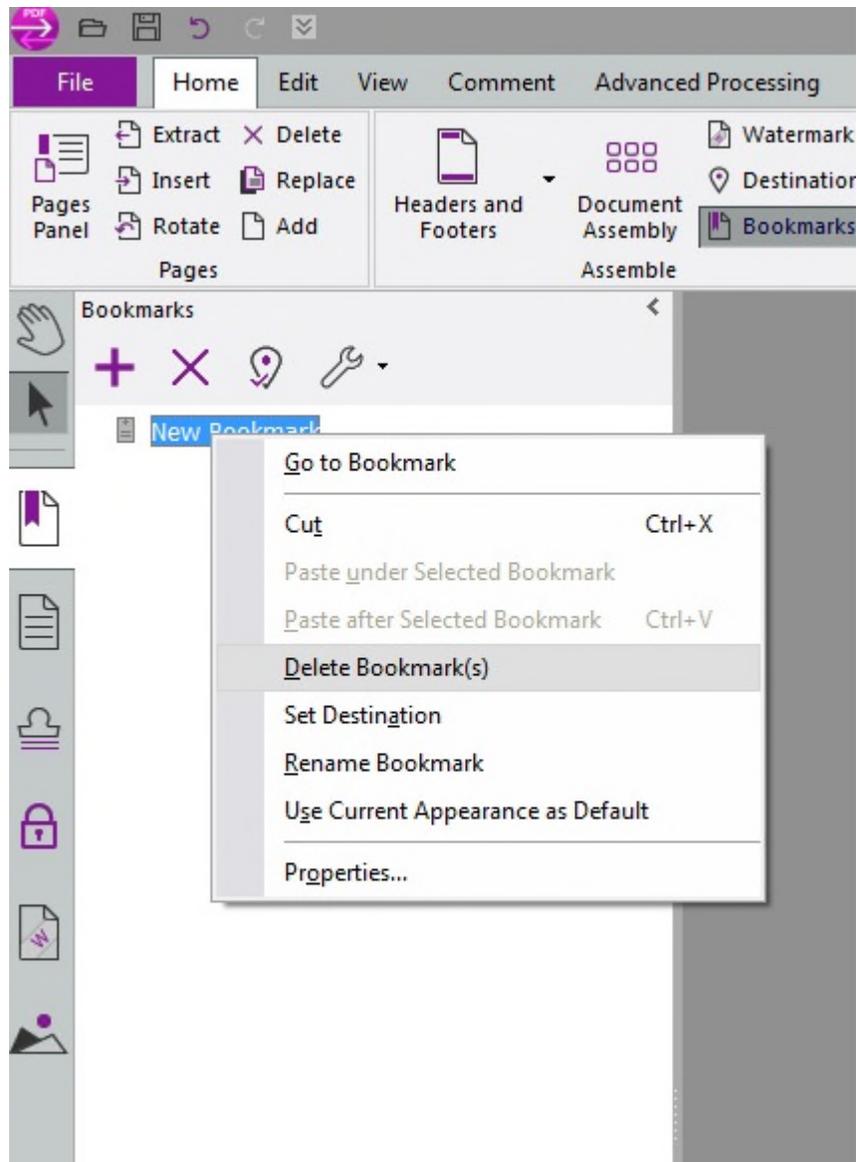
Note: Deleting a bookmark within a multi-level structure will also delete all the bookmarks
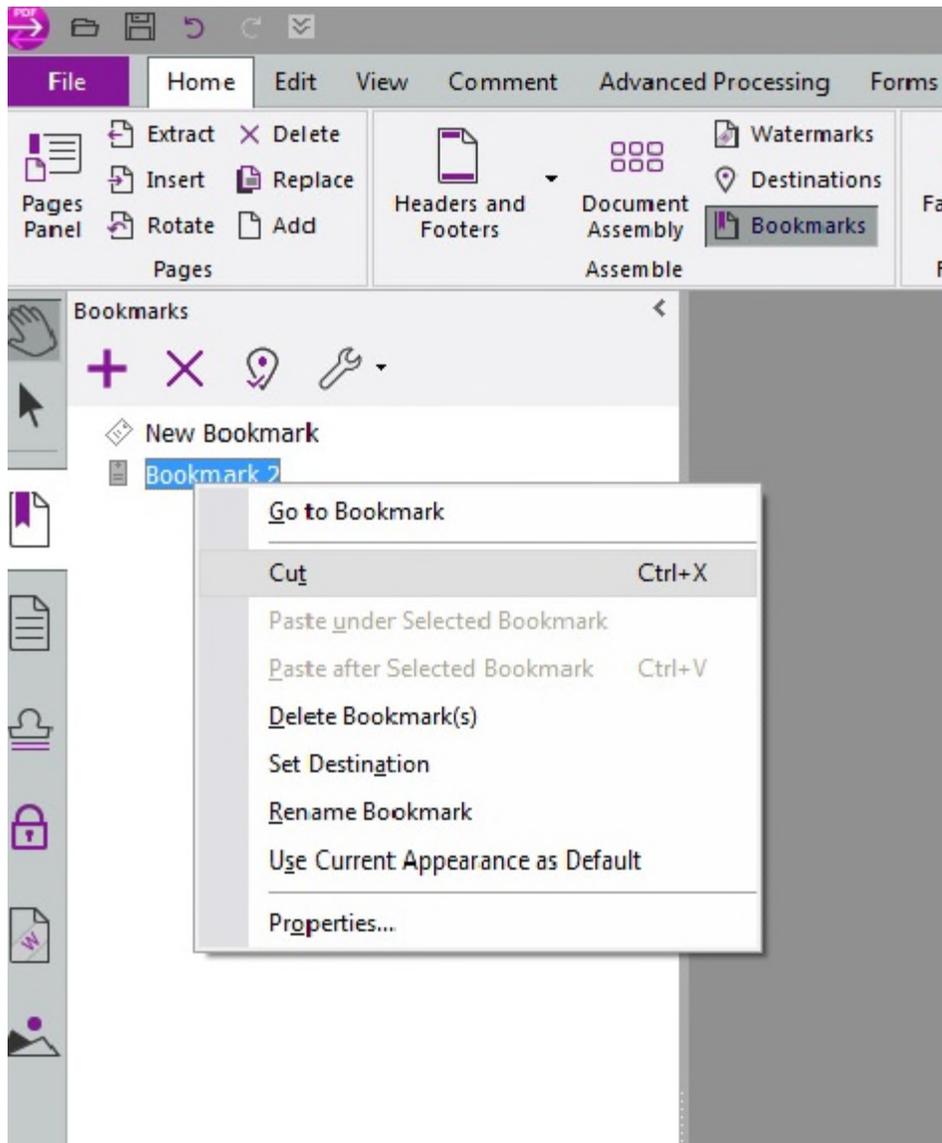
nested below it.

To create a second-level bookmark

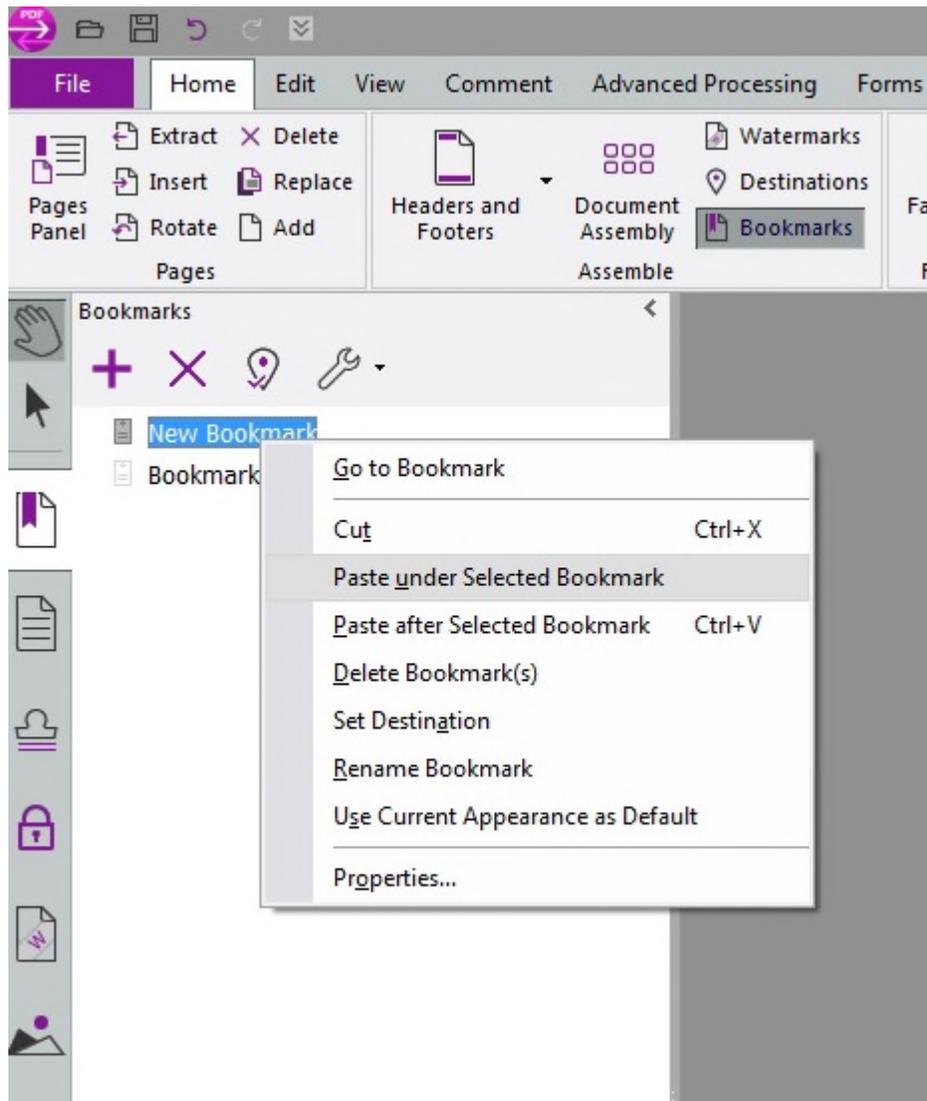1. First create a top-level bookmark, as previously described.
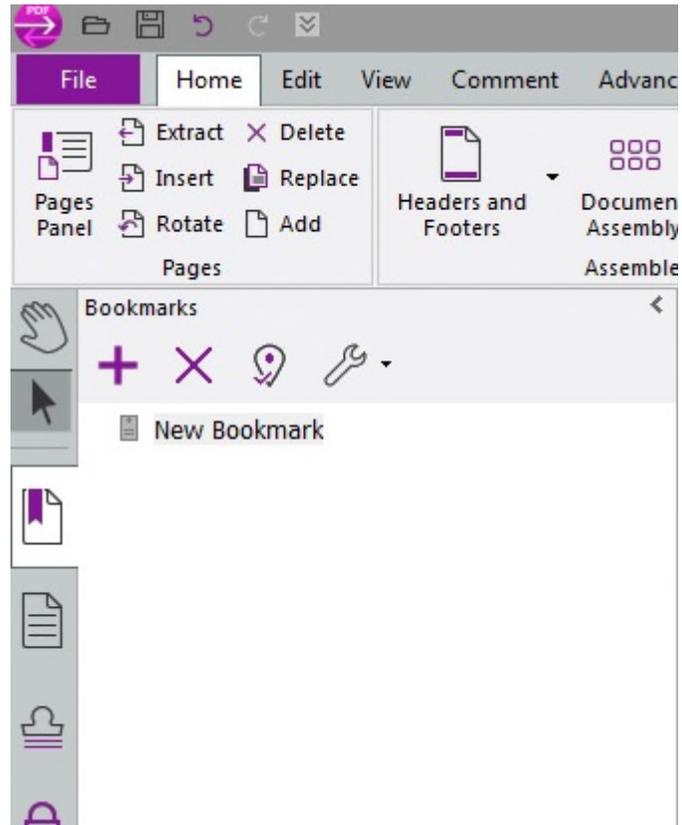
2. Repeat the process to create a second bookmark below the first, and right-click it.

3. Choose **Cut** from the drop-down menu (the cut bookmark does not disappear).

4. Right-click the first bookmark, which will be your top-level bookmark.

5. Choose **Paste under Selected Bookmark** from the drop-down menu.

If you choose **Paste after Selected Bookmark**, the cut bookmark will be placed at the same level in the hierarchy as the one above it. Repeat this procedure to make a multi-level set of bookmarks.

General Bookmark Preferences

To set general bookmark preferences, click on the **Option** tool (the wrench) in the Bookmarks Panel and select **Preference**. You can choose **Highlight Current Bookmark**, **Hide after Use**, **Wrap Long Bookmarks** and **Text Size**.
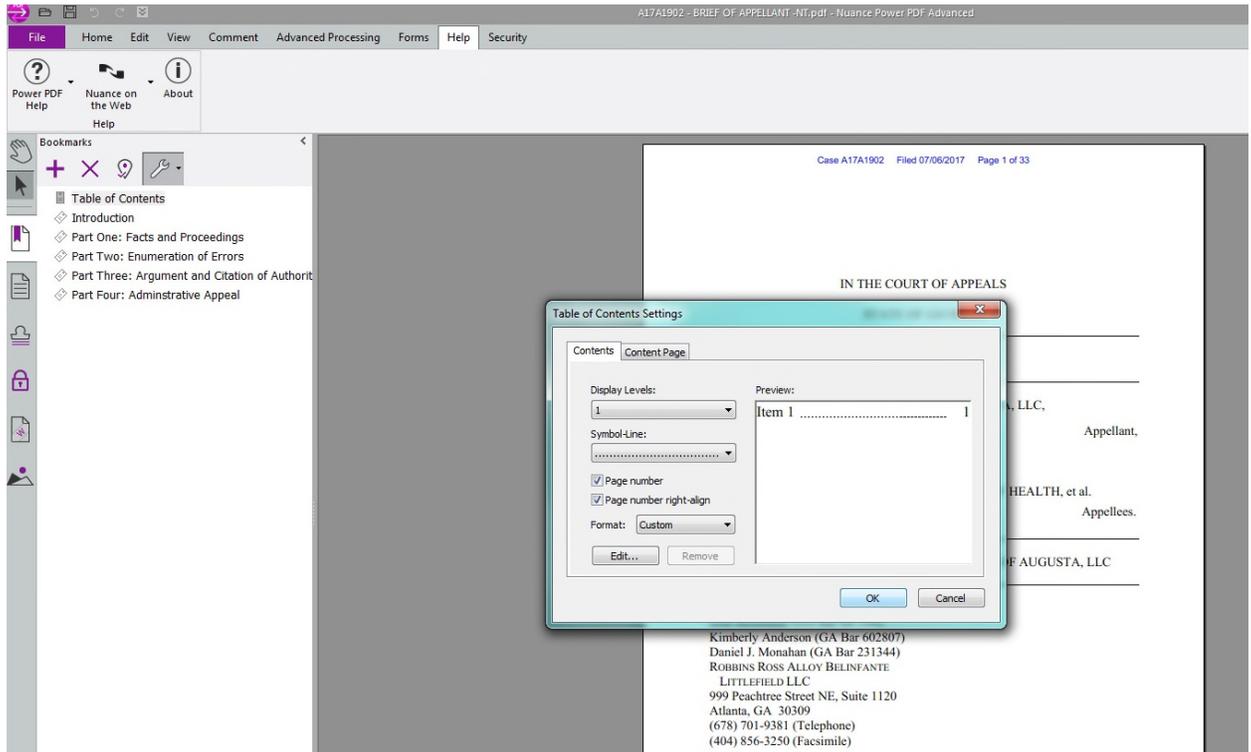
Creating a Table of Contents from Bookmarked Items

You can create a document titled Table of Contents that includes all your bookmarks and their page numbers in one place.

1. To create a Table of Contents, first create least one bookmark.

2. In the Bookmarks bar, click the **Options** tool (the wrench) and select **Create Table of Contents** or **Export Table of Contents**.
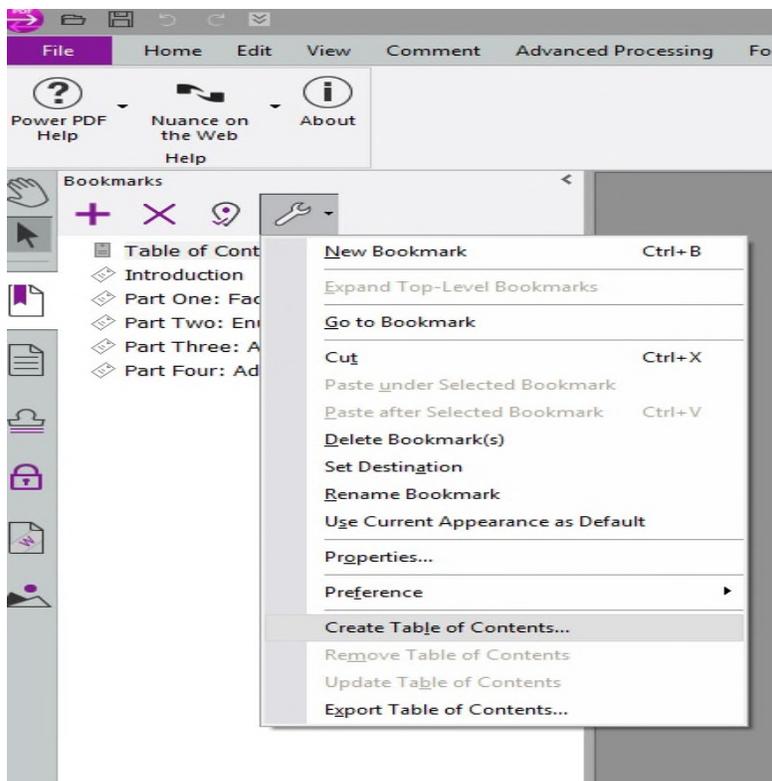
3. Review settings and click OK.

Note

- Creating a Table of Contents adds another page to your document, so make sure to adjust any reference pages to reflect the additional page.

- The Table of Contents feature is not dynamic, so it will not change as you add additional bookmarks. To update it, start at Step 2, but select **Update Table of Contents**.

Creating Notes While Reviewing a PDF

- Click **Comment** at the top of the screen, then click the **Note** icon on the left.
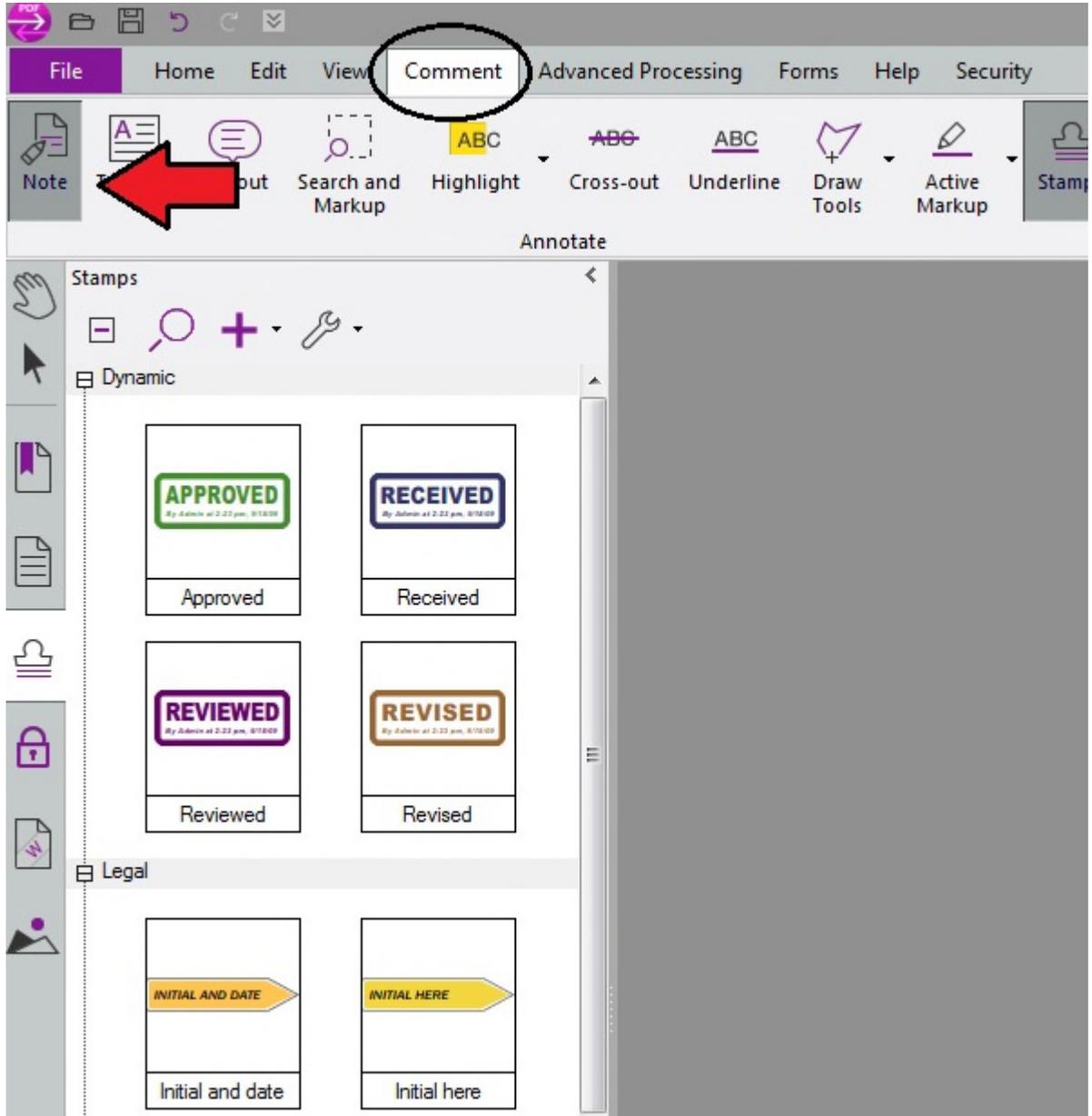
- Highlight the text you want to make note of and type your comment. The system will automatically insert your login ID as the author in the Note's caption.
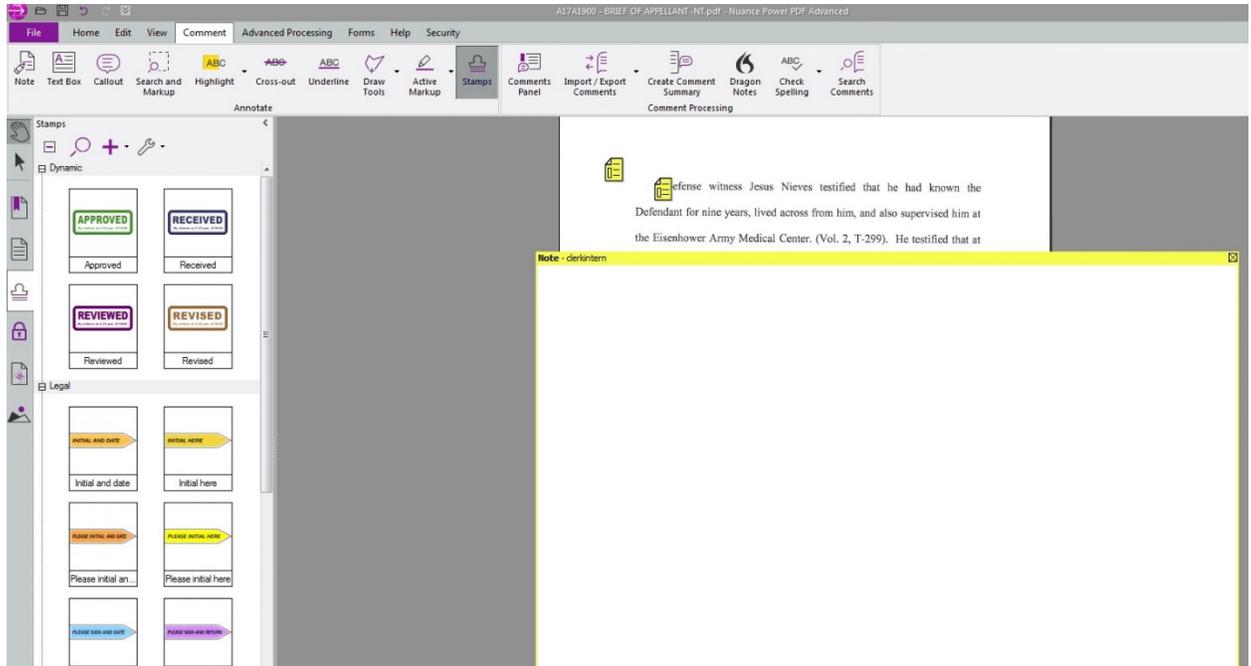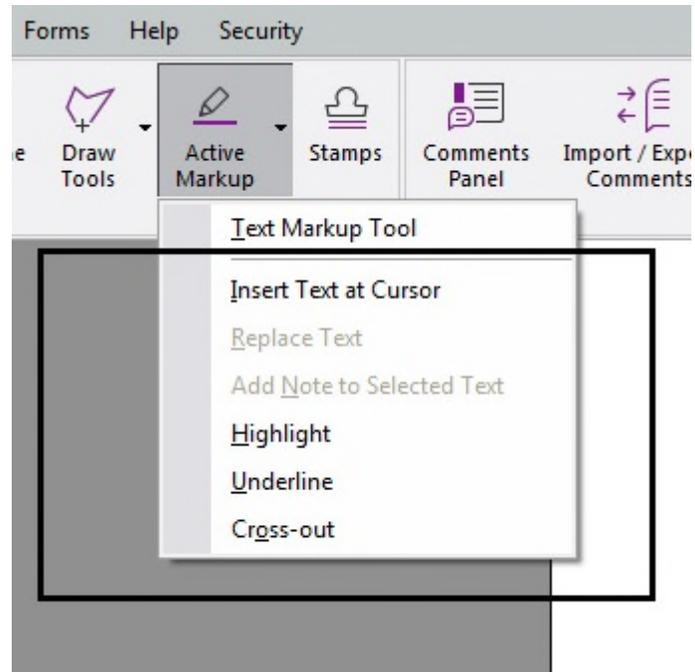

Click the **X** in the upper right corner of the Note to close it. Click the down arrow next to **Active Markup** see the drop-down menu. The multi-purpose **Text Markup** tool at the top of that menu lets you show suggested changes.
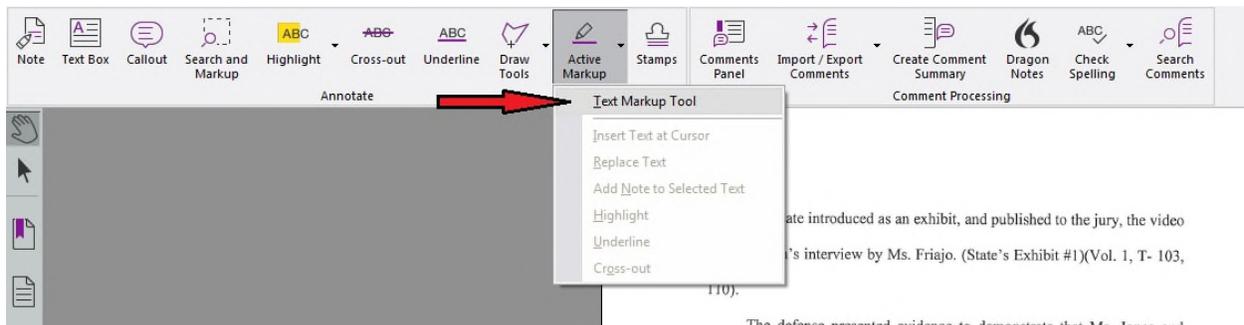
The menu offers three separate tools to add, delete or replace text.

It also offers tools that operate on a text selection:

Add Note to Selected Text: The selected text appears highlighted with a Note icon indicating there is a comment to it. Everything else is the same as for making a note, except for the text window name: here, it reads Comment on Text.

Highlight Selected Text: The selection gets highlighted (nothing else happens).
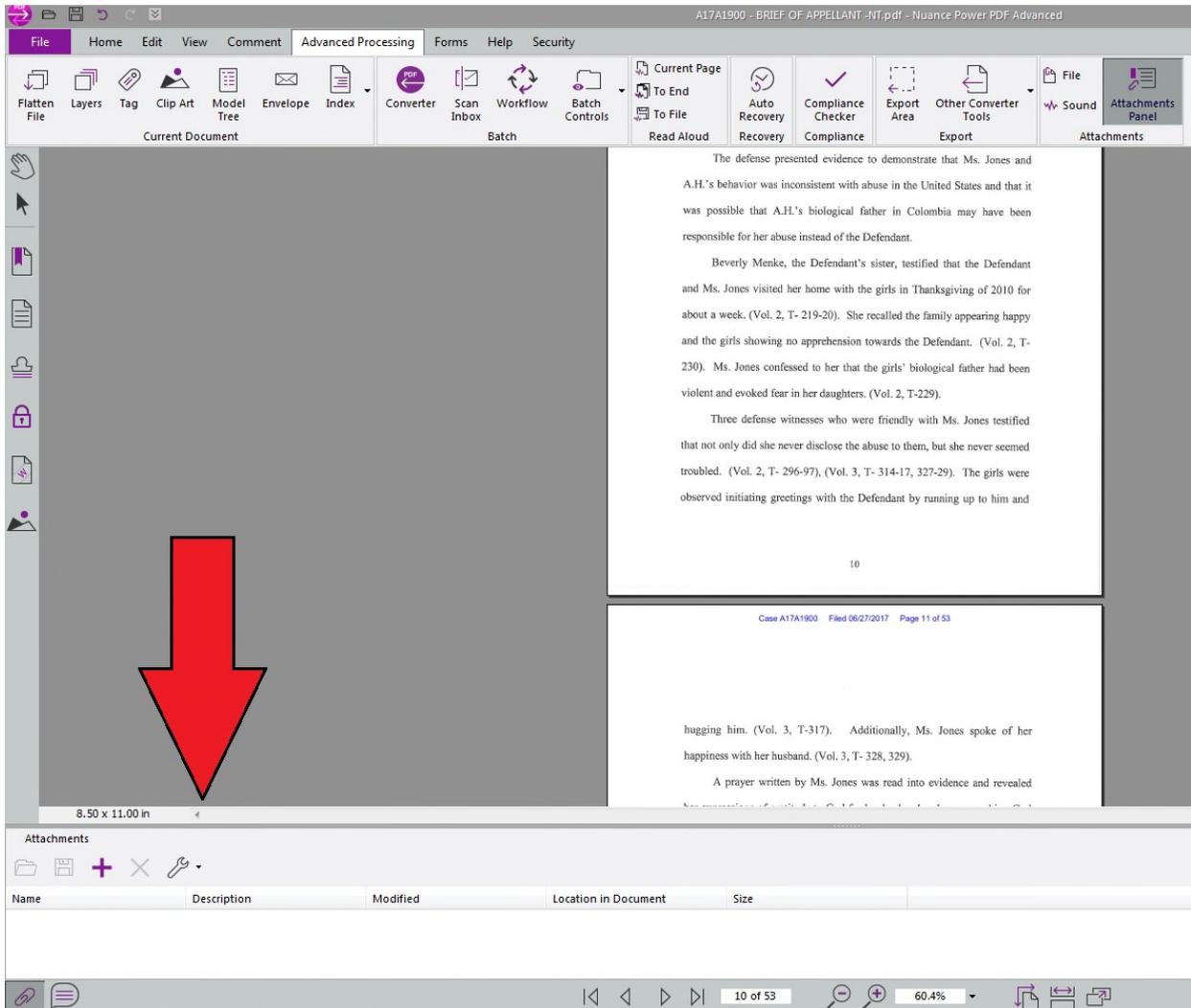
Underline Selected Text: The selection gets underlined (nothing else happens).

Adding Attachments to a PDF Document

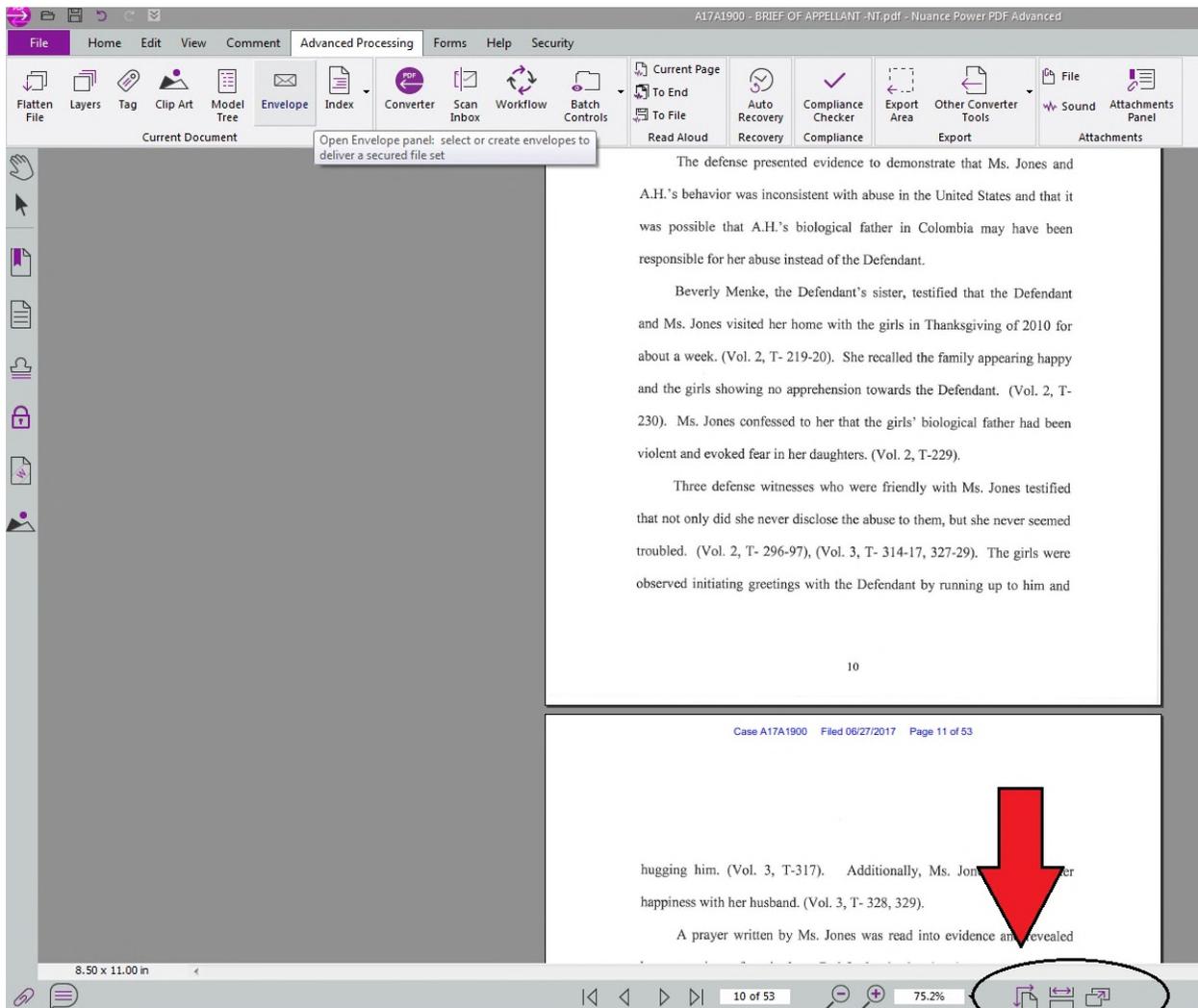1. Click **Advanced Processing** at the top of the screen, then click on **Attachments Panel**.
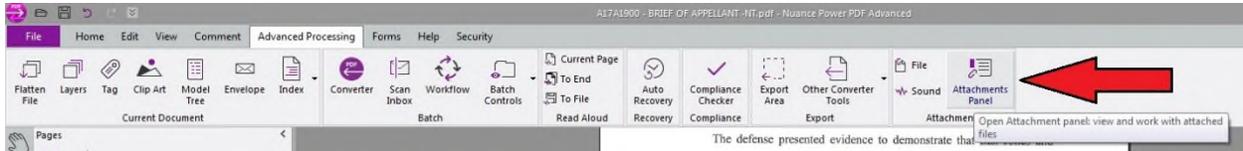
2. A bar will appear on the bottom of the screen. Click + to add an attachment.

Note: You can add other parts of the record to a pdf document by using the Attachment feature, making it easier to switch between different record documents.

Change View

There are three default views you can use to view pdf documents: 1. **Fit page and show one page at a time**, 2. **Fit width and scroll pages continuously** (the default option), and 3. **Display page on full screen**. To change the view, select one of the icons on the bottom right of the screen, next to the box showing the percentage of page zooming.
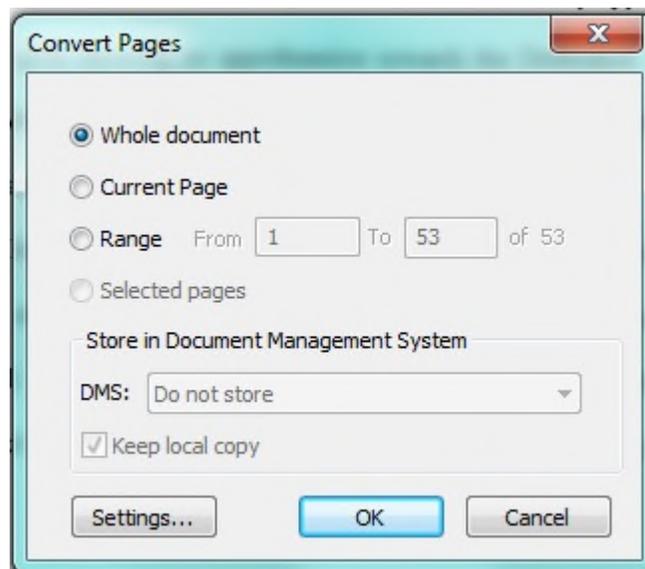
Convert PDF Documents to WordPerfect

1. Click the **Advanced Processing** tab at the top of the page.

2. Click **Other Converter Tools**.
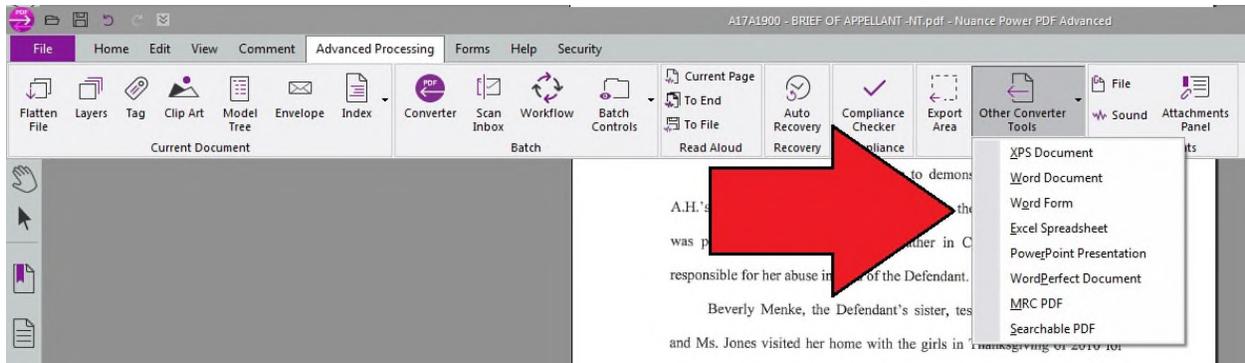
3. Select the type of file you want to convert the pdf to.

4. Click **OK** and select the location where you want the converted file to be saved.

5. Click **Save** and wait for the file to be converted.