

CaseMap Adobe® Acrobat® Plug-in

Description:

The CaseMap Adobe Acrobat Plug-in is a utility that adds "Send to CaseMap" functionality to Adobe Acrobat. CaseSoft developed the plug-in to enable a more seamless integration between CaseMap and Adobe Acrobat. With a few strokes of the mouse, you can send facts into CaseMap from selections in Adobe PDF files. The plug-in automatically fills in the CaseMap "Fact Text" with your text selection in Acrobat (if you have one). It also fills in the CaseMap "Source(s)" field with a reference to the PDF file and the page number the selection is on. With two mouse clicks, CaseMap will launch Acrobat, open the PDF file, navigate to the sourced page, and highlight your original text selection.

System Requirements:

- CaseMap (version 3.2 or higher).
- Adobe Acrobat or Adobe Acrobat Reader® (version 4 or 5).

Differences with Adobe Acrobat Reader

- If you are only using Acrobat Reader, CaseMap cannot take you back to the exact page in the sourced PDF file.
- CaseMap will always reopen the PDF file in Acrobat Reader to its first page.
- Adobe imposes this restriction on plug-ins for Acrobat Reader, not the full version of Acrobat.
- The "Send to CaseMap" functionality in Acrobat is identical with the full version of Adobe Acrobat and the free version of Adobe Acrobat Reader.

Note: from this point in the documentation, Adobe Acrobat and Adobe Acrobat Reader will be referred to as Acrobat.

Installation Instructions:

- Before installing the CaseMap Adobe Acrobat Plug-in you must have one or more of the required versions of Acrobat and CaseMap (version 3.2 or higher) installed on your computer.
- Close any open copies of Acrobat.
- Run the CaseMap Adobe Acrobat Plug-in installation program. You can obtain the installation program at www.casesoft.com.
- Follow the steps in the installation program.
- The installation program will install the plug-in for each supported version of Acrobat installed on your computer.
- The plug-in is not installed for the PDF viewer in your Internet browser. It only works in the stand-alone versions of Acrobat.
- If you install another version of Acrobat on your computer after you have installed the plug-in, you must reinstall the plug-in to make it available in the newly installed version of Acrobat.

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Figure 1: Send to CaseMap button on Acrobat toolbar. The actual location of the button may differ from this depiction.

Verifying the Plug-in is Installed and Loaded

- After you have installed the plug-in, open Acrobat.
- You should notice a "Send to CaseMap" menu item on the Acrobat File menu and a "Send to CaseMap" button on the Acrobat toolbar (see Figure 1).
- If you do not see the menu item or toolbar button please read the section "**Disabling the "Certified Plug-ins Only" Preference in Acrobat 5"** for more information.

About Adobe PDF Files

Adobe PDF is a format that preserves the fonts, graphics, formatting, and color of any source document, regardless of the application used to create it. The method used to create a PDF file will determine whether the PDF file contains just an image of the sourced document or both an image and the document's text.

The CaseMap Acrobat Plug-in works with any type of PDF file. The text selection functionality described in this document is only applicable when a PDF file contains text.

If you have questions regarding the type of PDF files you have, please consult the documentation for the software you use to create your PDF files. If your PDF files are created by a document service provider, the service provider should be able to answer your questions.



Figure 2: Text select tool button on Acrobat toolbar. The actual location of the button may differ from this depiction.

Selecting Text in Acrobat

Select the text select tool (see Figure 2) and do one of the following:

- To select a line of text, select the first letter of the sentence or phrase and drag to the last letter.
- To select multiple columns of text (horizontally), hold down Ctrl.
- To select a column of text (vertically), hold down Ctrl+Alt as you drag the length of the document.

If words in the PDF file are not highlighted when you try selecting them, that portion of the PDF file probably does not contain text.

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Using the "Send to CaseMap" Command in Acrobat

- Open one or more of the PDF files in Acrobat you want to link to CaseMap.
- Open the case in CaseMap you want to link the PDF files to.
- *Optional:* Select a portion of text in a PDF file that you want to send to CaseMap as a new fact.
- Click the "Send to CaseMap" tool button (see Figure 1) or "Send to CaseMap" menu item on the Acrobat File menu.
- CaseMap will come to the foreground with a new fact inserted on the Fact Tab.
- The "Fact Text" field for the new fact will contain the text selection from the PDF file. If you do not select text, the "Fact Text" will be blank.
- The "Source(s)" field will contain a link back to the PDF file and page number. The text in the "Source(s)" field will be in the following format:
 - Acrobat [*drive:\path\filename/...*] Page #
- You are now free to make any edits you want to the new fact, i.e.: specifying the "Date and Time", modifying the "Fact Text", etc.
- Be careful not to modify the text "Acrobat [...]" within the "Source(s)" field. CaseMap uses this information to link back to the PDF file in Acrobat.
- You can use the "Send to CaseMap" command as many times as you want within a single PDF file and from multiple PDF files.

Opening the Linked PDF File from CaseMap

- Open a case in CaseMap. Locate a fact that you inserted from Acrobat with the "Send to CaseMap" command.
- Right mouse click on the word "Acrobat" in the fact's "Source(s)" field.
- Select "Open Linked File" from the popup menu that appears.
- CaseMap will launch Acrobat (if it is not already open) and open the linked PDF file.
- If you are using the full version of Acrobat (not Reader):
 - CaseMap will navigate the PDF file to the sourced page.
 - CaseMap will highlight the text you had selected (if any) when you originally created the link.

Important Information about the CaseMap to Acrobat Link

- The "Source(s)" field link in CaseMap is based on the file name, file path, and page number in the PDF file.
- The following actions will "*break*" the link from CaseMap to a PDF file resulting in an "Error opening the document":
 - Changing the PDF's file name.
 - Changing the location/folder the PDF file is stored in.
- If you add or remove pages to/from a PDF file you will "*break*" the page number link. This will cause CaseMap to navigate Acrobat to the incorrect page.
- *CaseSoft recommends storing all of your PDF files for a particular case in the same folder.*

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- If you are sharing your CaseMap case with other users:
 - Store all of your PDF files in a shared network folder.
 - If you are using a mapped network drive, the mapped drive letter needs to be the same on each user's computer.

Plug-in Advanced User Options

The CaseMap Acrobat Plug-in option selections are located under CaseMap on the Acrobat Tools menu.

Bring CaseMap to Front (with Text Selection)

- This option is checked by default.
- With this option checked, CaseMap will come to the foreground when you use the "Send to CaseMap" command in Acrobat.
- When this option is not checked, Acrobat will remain in the foreground when you use the "Send to CaseMap" command as long as you have a text selection.
- CaseMap will always come to the foreground when you do not have a text selection.

Hard-Code File Paths

- This option is not checked by default.
- This option controls how the "Source(s)" field link is created in CaseMap.
- The purpose of this option is to make it easier to change the location of your linked PDF files without breaking the links.
- Use (check) this option if:
 - All of your PDF files for a case are stored in the same folder.
 - You will be changing the location of the PDF files, i.e.: putting them on a laptop to use at court.
- When this option is not checked:
 - The "Source(s)" field link will contain the complete file path and file name of the linked PDF file.
 - Acrobat [*drive:\path\filename/...*] Page #
- When this option is checked:
 - The "Source(s)" field link will contain only the file name of the linked PDF file.
 - AcrobatHC [*filename/...*] Page #
 - CaseMap **hard-codes** the file path in the AcrobatHC file viewer definition for the case.
 - Each hard-coded PDF file for a particular case must be stored in the same folder for the links to function properly.
- Each CaseMap case can have links that are hard-coded and not hard-coded.
- You can distinguish between hard-coded links (AcrobatHC) and non hard-coded links (Acrobat) by the file viewer name at the beginning of the "Source(s)" field text.

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Insert Hard-Coded Viewer

- This command should be used in conjunction with the "Hard-Code File Paths" option after you have moved your hard-coded PDF files to a different location.
- Open one of the hard-coded PDF files in Acrobat.
- Open the CaseMap case that is linked to the hard-coded PDF file.
- Click the "Insert Hard-Coded Viewer" menu item.
- The plug-in will update the hard-coded file path in the CaseMap case to the new location.
- As a result, all of your hard-coded links will be updated and functioning.

Important Note:

Adobe Acrobat 5.0 and Adobe Acrobat Reader 5.0 have an option to run in Trusted Mode. When Trusted Mode is enabled, Acrobat will not load the CaseMap plug-in and the "Send to CaseMap" functionality will not be available. The CaseMap Acrobat Plug-in installation program attempts to disable this option when installing the plug-in. If you have installed the plug-in and the "Send to CaseMap" menu item and tool button do not appear in Acrobat, you may need to uncheck the "Certified Plug-ins Only" preference.

Disabling the "Certified Plug-ins Only" Preference in Acrobat 5

- Select Preferences...General on the Edit menu, this will open the Acrobat Preferences dialog box. Note: In Reader just select Preferences.
- Select "Options" within the Preferences dialog box.
- Uncheck the "Certified Plug-ins Only" preference.
- You must close and reopen Acrobat for this change to take effect.