OnBase Guide - Adobe Acrobat Optimize Scanned Documents

Goal: To optimize PDF files for storage in OnBase.

Complexity Level: Functional End Users

3/21/2019

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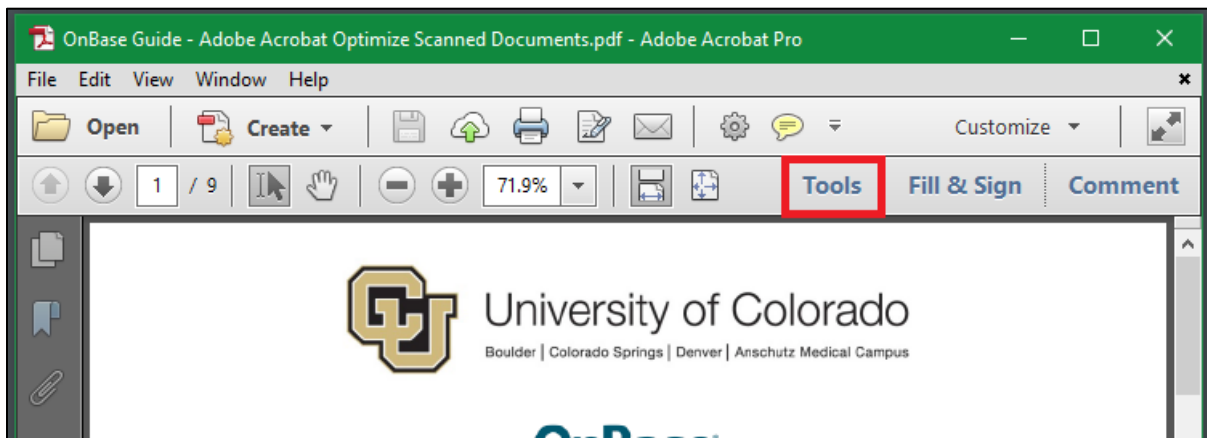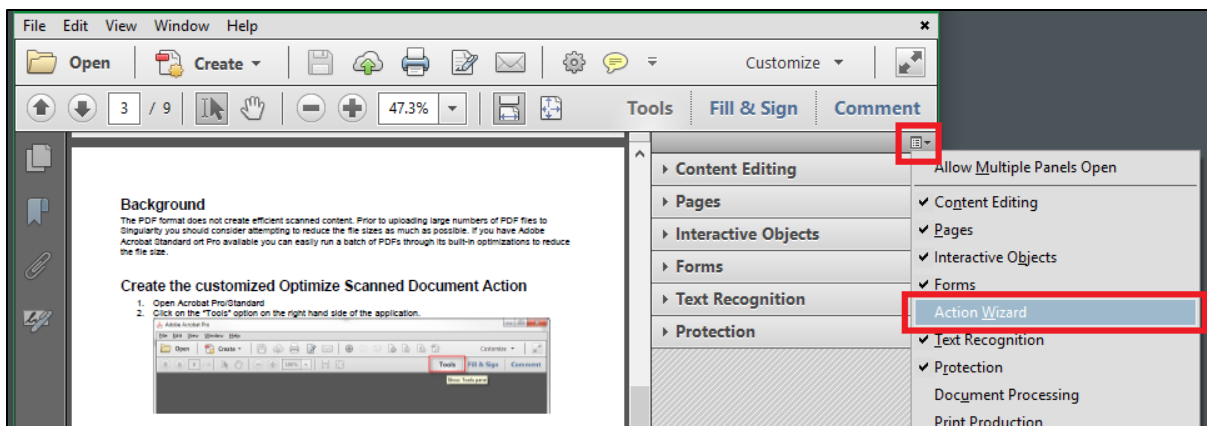Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Background

The PDF format does not create efficient content for electronic storage. Prior to uploading large numbers of PDF files to OnBase, you should consider attempting to reduce the file sizes as much as possible. If you have Adobe Acrobat Pro available, you can easily run a batch of PDFs through its built-in optimizations to reduce the file size.

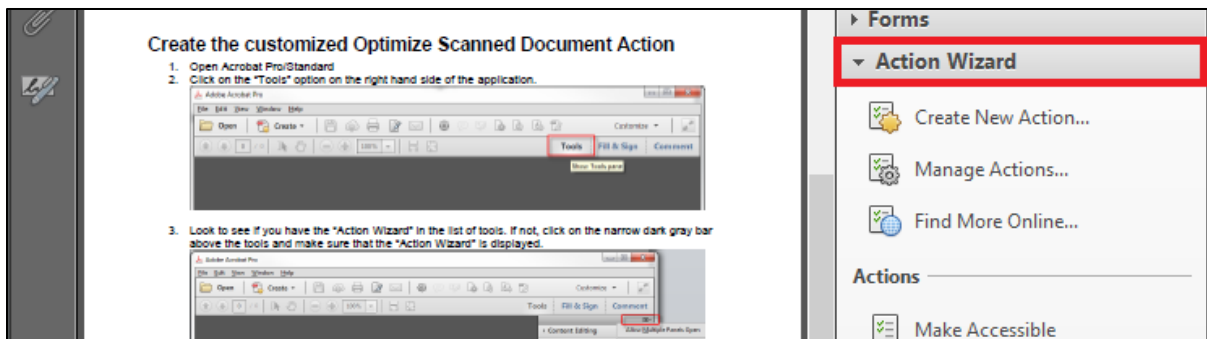# Create the customized Optimize Scanned Document Action

1. Open Adobe Acrobat Pro.
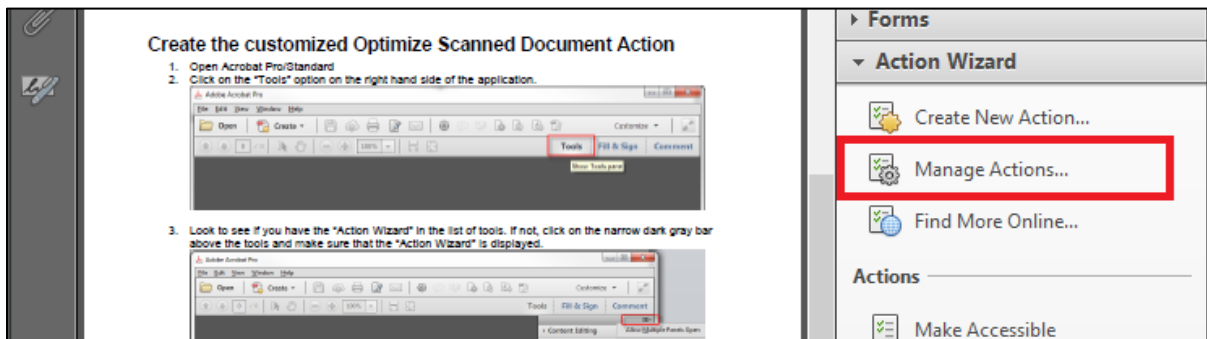
2. Click on **Tools** in the top toolbar.

3. Look to see if you have the **Action Wizard** in the list of tools. If not, click the **Show or Hide Panels** button in the grey bar above the list of available tools. Click **Action Wizard** in the list to enable.
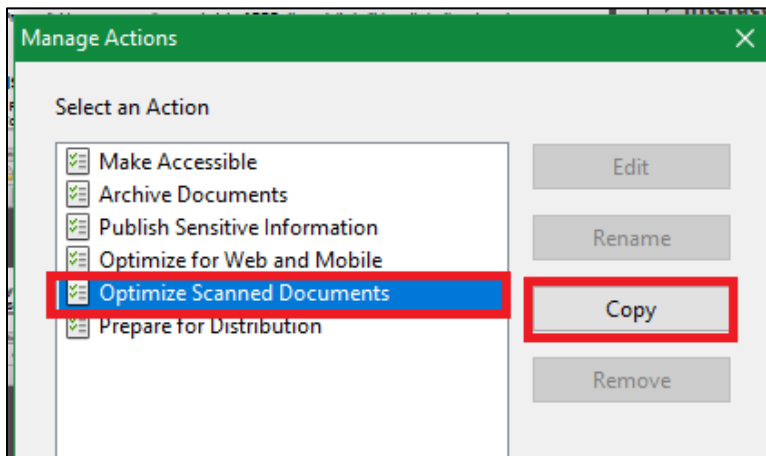

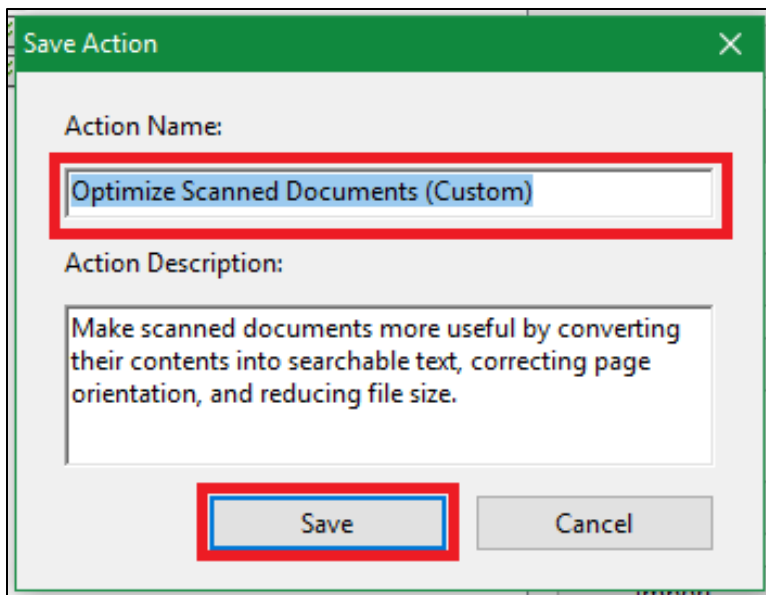4. Select **Action Wizard** from the list of tools to expand it

5. The built-in **Optimize Documents** action has more steps than we need so we will make a copy of that action to make a custom version of it. Click **Manage Actions**.
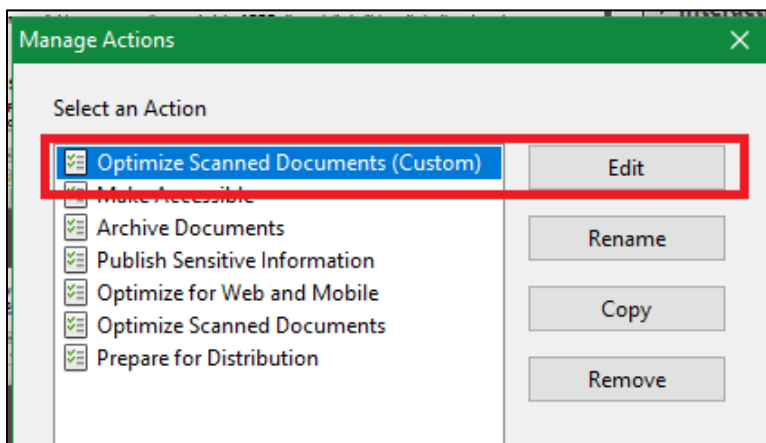

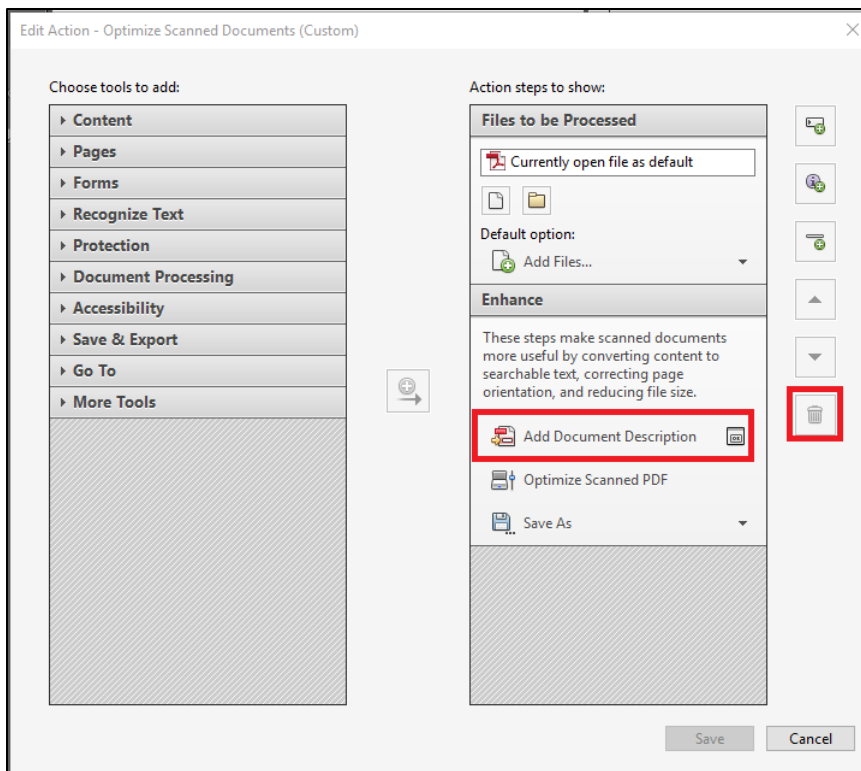6. Choose **Optimize Scanned Documents** from the list and click the **Copy** button.

7. Change the name if you wish and click **Save**.

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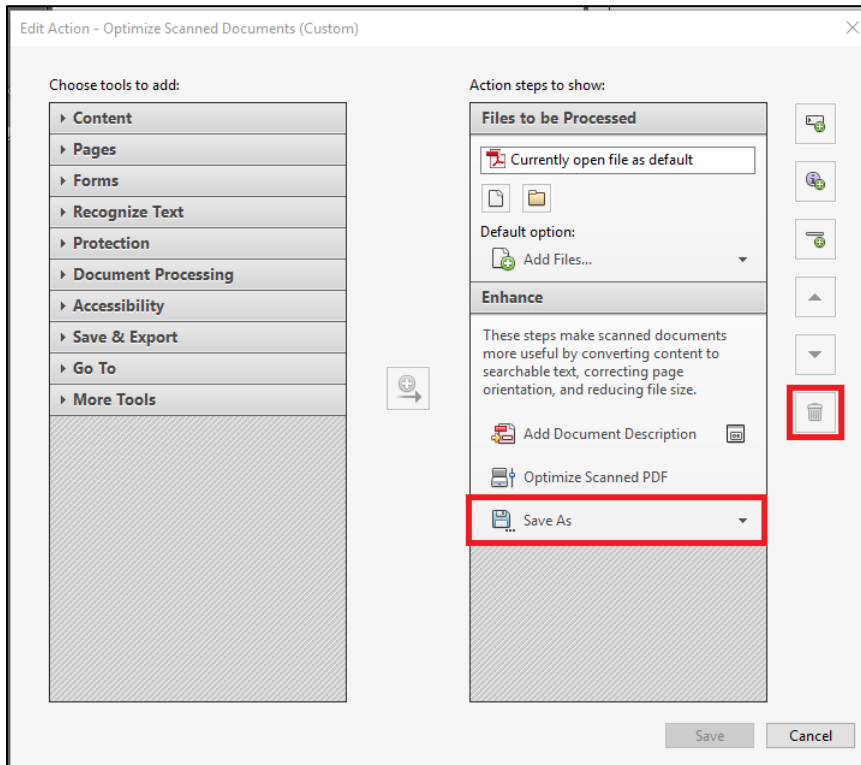Boulder | Colorado Springs | Denver | Anschutz Medical Campus
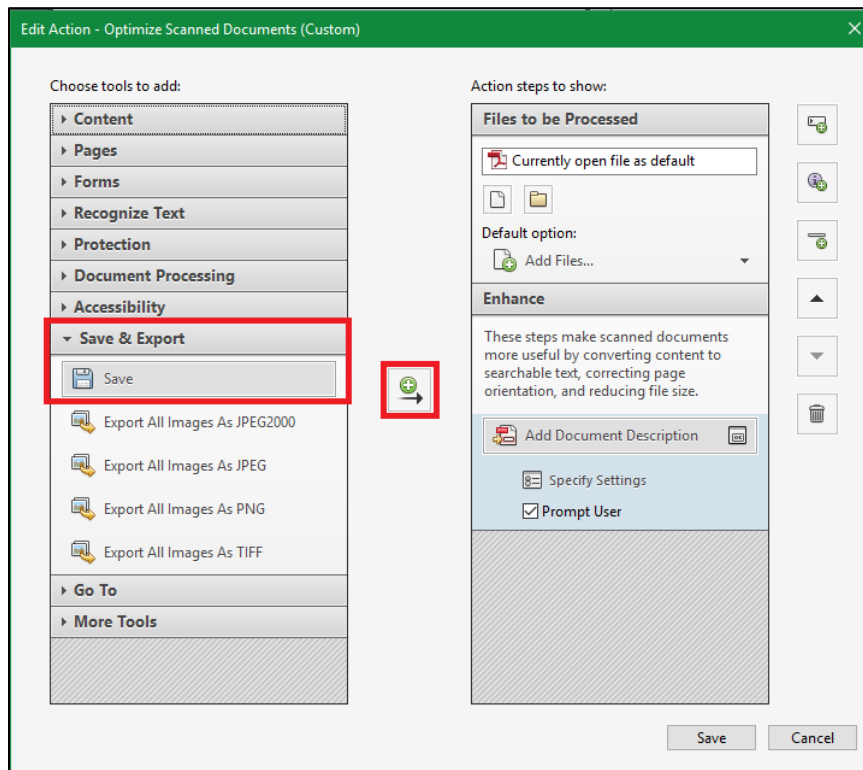
8. Select the new action and click the **Edit** button.

9. Select **Add Document Description** in the Enhance section then click on the **Trash Can** to remove that action.

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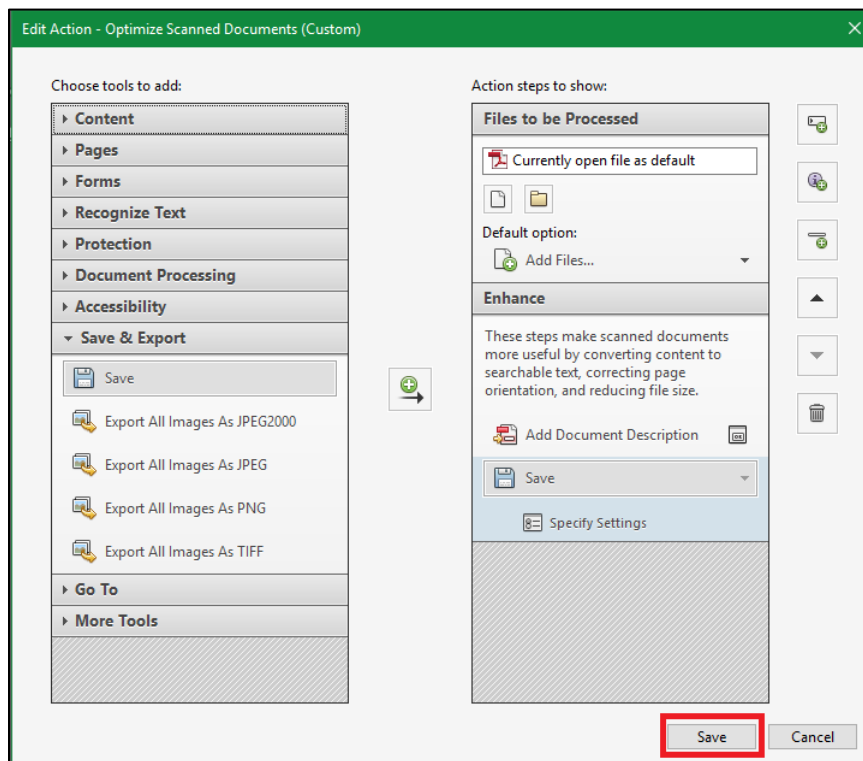Boulder | Colorado Springs | Denver | Anschutz Medical Campus

10. Select **Save As** in the Enhance section then click on the **Trash Can** to remove that action.

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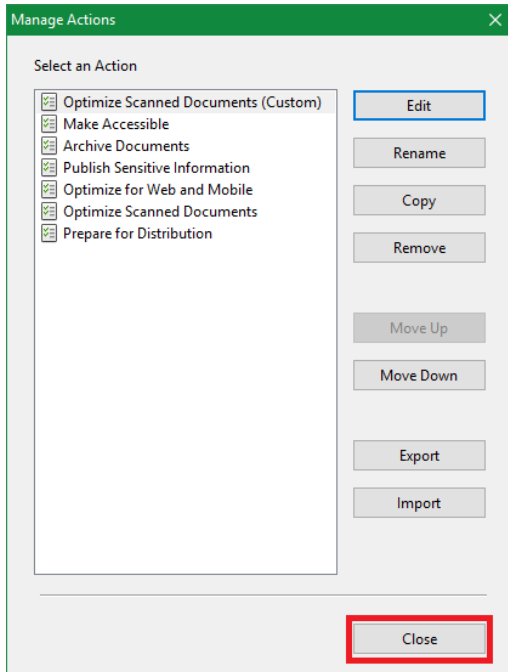Boulder | Colorado Springs | Denver | Anschutz Medical Campus

11. On the left hand side click to expand the **Save and Export** section to display the actions available. Choose the **Save** action and use the arrow to add the action.

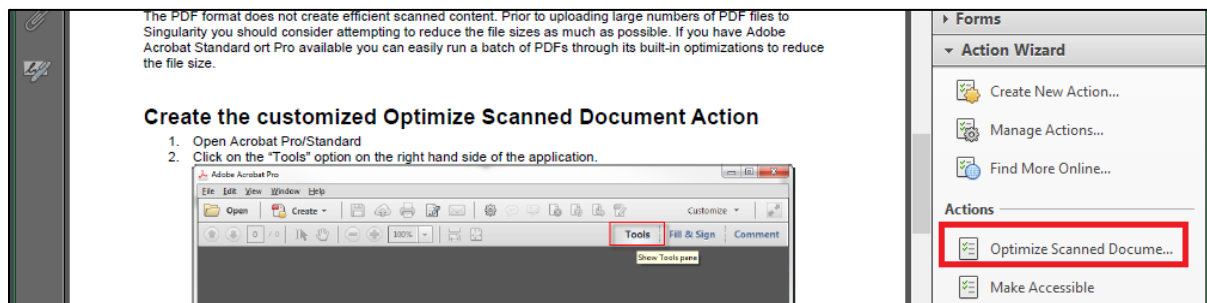12. Click the **Save** button to save the copy of the Optimize Scanned PDF action.

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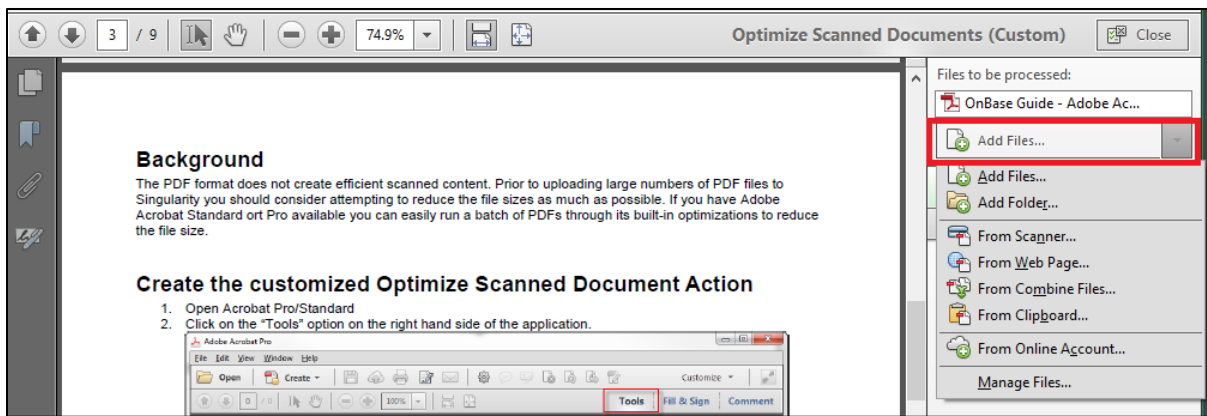13. Click **Close** in the Manage Actions dialog.

Using the Optimize Scanned Documents Action

We can now use this customized Optimize Scanned Documents Action to batch process and reduce the file size of a large number of PDFs.
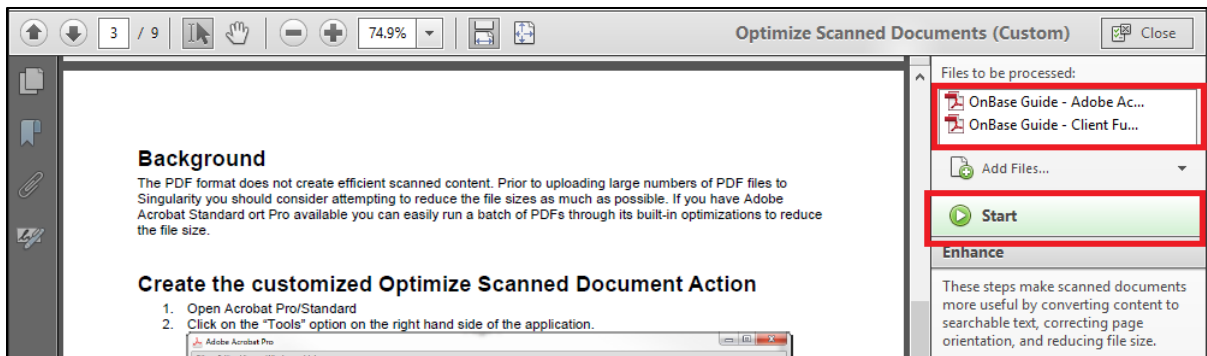
1. Select **Optimize Scanned Documents (Custom)** from the Action Wizard list of actions.

2. Click the **Add files** dropdown to either select a few PDFs or select an entire folder of PDFs to process. Note: If you select a folder this process will also traverse down all sub-folders to find any PDF to process. Also, this process will overwrite the original PDF file with the optimized one.

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3. Once you've selected a folder (or files) to process, they will show up in the dialog. Depending on how many files there are, this step may take a few minutes. Click **Start** to begin the process.

4. This optimization process can take a <u>very</u> long time to complete depending on how many files you have and the number of pages in each file. It would be wise to run this on a machine that is not actively being used by someone, like a server.

5. Once the process completes, each file will have a checkmark and Completed will appear where the button was.