Noah Katz
Workflow Design Analyst
Adobe Certified Expert: Acrobat 4, 5, 6

AcroButtons/AcroDialogs Business case:

Background: When buying a house or other real estate, one of the tasks required of the title company preparing the transactional paperwork package is to research the ownership history of the property. They typically subcontract this task to a specialist firm doing title searching or abstracting. These have the people who locate and print out ownership records, liens, recording documents, etc. from courthouses and other data repositories. Their document delivery package is specified based on varied requirements such as the turn-around time (due date, dependent on the closing date of the sale), depth of search, how many owners to trace back, or how many years to trace back, and many other factors.

In Maryland, one abstracting company starts with a printout of the current ownership of a property from the Maryland Department of Assessments and Taxation of a Real Property Data Search from an online state-operated database. This displays the address, owner, tax information, etc. They then handwrote notes and instructions on this printout, and give it to the individual abstractor to take to the courthouse. This person then uses the instructions and data on this paper to assemble the document package. The notations include instructions such as delivery schedule, depth of search, number of owners to search, etc., and metadata such as the internal company file number, client codes, etc.

In the revised workflow, the web page report is printed to PDF. Then, an AcroButton is used that creates form fields (Acrobat JavaScript doc.addField) in the designated 'empty' spaces on the page. Some of these are formatted with simple borders and designated for notes to be entered during the records search. Most of the form fields are intended to display the instructions or reference data. After the fields are added, AcroDialogs are passed to the user to get data entry for populating those fields. The completed page is printed for distribution to the individual abstractor. Now, all the instructions have been neatly printed, ensuring greater clarity and less clutter on the page. Also, many of the field data elements are selected from drop-down 'pick-lists' allowing for greater accuracy with fewer typographical errors.