eCopy PDF Pro Office Quick Reference Card

CREATE. CONVERT. EDIT.

Create a PDF

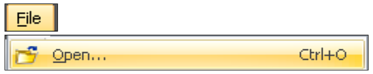
Printing to PDF using a "PDF Print Driver" is the most common method for creating PDF files.

1. Open a document in a desired application.
2. Click **File > Print**.
3. Select the **ScanSoft PDF Create** printer driver from the list of available printers.
4. Select a location to save the PDF.

Note: Within MS Office applications, you can also click on the PDF Menu buttons to create PDF files, create and email PDF files, and access create PDF settings.

Creating a PDF within eCopy PDF Pro Office is as simple as opening a file.

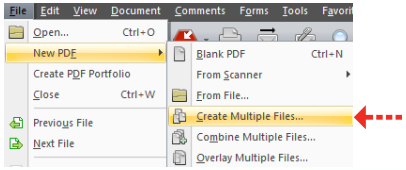
1. Choose File > Open.



2. Change **Files Of Type** field to "All Files".
3. Select the file and click **Open**.
4. The document will automatically convert to a PDF file, and open in eCopy PDF Pro Office.

Batch creation allows users to convert multiple files at the same time.

1. Click **File > New PDF**, and select **Create Multiple Files.**



2. Click **Add**, then browse to select your documents.

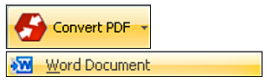
*(Make sure **"Create a PDF for each Input Document"** is selected in the drop down.)*

3. Click the **Create** button.

Convert a PDF

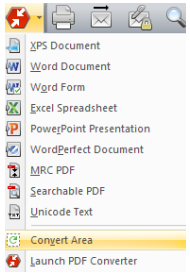
Converting a PDF File into MS Word within eCopy PDF Pro Office.

1. Open PDF within eCopy PDF Pro Office.
2. Click **Convert PDF** icon and select **Word Document**.



3. Select the pages to be converted.
4. Select a location to save to and click **OK**.

Convert Area feature is a great way to reuse a portion of an existing document.



1. Open a PDF in eCopy PDF Pro Office and click on the **Convert PDF** button.
2. Select the **Convert Area** tool.
3. Select area of document you'd like to convert.
4. When the "Save As" menu opens, name your file and select the file type.

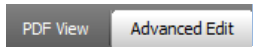
The **PDF Converter Assistant** completes the conversion of the area you selected.

For example, if you select Word Documents as your file type, the area that was selected for conversion will appear within a Microsoft Word document allowing you to perform edits to the text and formatting.

Note: eCopy PDF Pro Office provides the ability to convert a selected area of a page to Word, Excel, PowerPoint, and WordPerfect!

Edit a PDF

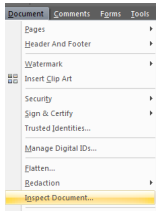
Advanced Edit converts and displays your document as a fully editable document. This allows much faster and more fluid editing without having to move to a word processor.



1. Open PDF within eCopy PDF Pro Office
2. Click the **Advanced Edit** Tab
3. Choose **Conversion Method**
4. Edit PDF document
5. **Finalize** Advanced Edit
6. Click **PDF View** to return to native PDF format

Edit your PDF documents with Notes, Callouts and Text Boxes.

1. Open PDF within eCopy PDF Pro Office.
2. Click the desired icon, click the area where the **Note**, **Text Box**, or **Callout** should appear.
3. Type your text into the box – or just speak your note using Dragon Notes; be sure to click on the hand tool when you've finished typing.



Document Inspection allows you to remove sensitive/hidden contents found within a PDF document.

1. Open PDF within eCopy PDF Pro Office.
2. Click **Document** and select **Inspect Document**.
3. Select items from the displayed list that you would like to have removed from the document.
4. Click the **Remove** button.

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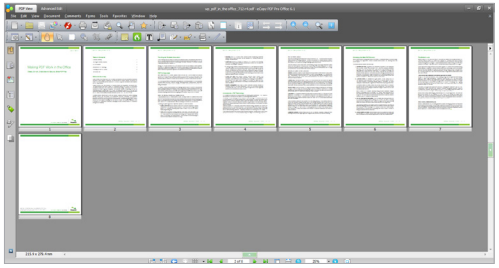
eCopy PDF Pro Office Quick Reference Card

ASSEMBLE. SECURE. SEARCH.

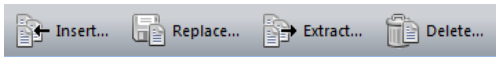
Assemble a PDF

Using the Document Assembly view allows pages of a document to be easily assembled and inserted with simple Drag and Drop control.

1. Open a multi-page document in eCopy PDF Pro Office.
2. Select **View > Document Assembly.**
3. Click on a page number to drag and drop the page to a different location within the document.



Using the Document Assembly toolbar, you can **Insert**, **Replace**, **Delete**, and **Extract** pages.



Note: Non-PDF files can be selectively inserted using the Page Assembly icon in the Tool Bar while in the Document Assembly view. Non-PDF's will be automatically converted to PDF prior to being inserted into the document.

Document Splitting allows a user to choose from 8 different splitting methods to split large documents into smaller segments.

1. Open a multi-page document in eCopy PDF Pro Office.
2. Click on **Document** > **Split Document**.
3. Select the appropriate Split Document settings, select a folder to save the split files, and click **OK**.

Secure a PDF

There are a variety of methods for securing PDF documents, including password security, certificate security, encryption, digital signatures, redaction, and metadata removal.

Redaction

The redaction tool allows you to create text redactions (by highlighting words) or zone redactions (by drawing boxes).

1. Open a PDF file within eCopy PDF Pro Office.
2. Click on **Document** > **Redaction** > **Mark Redaction**.
3. Click and drag the cursor to draw a box over the a defined area. *Note: Hovering over this area will display a preview of how the area will look when the redaction is applied.*
4. Click on **Document** > **Redaction** > **Apply Redaction**.

Security

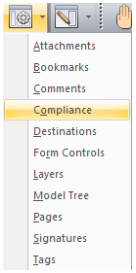
Security Schemes can be created in which document passwords, restrictions, encryption, and permissions can be defined.

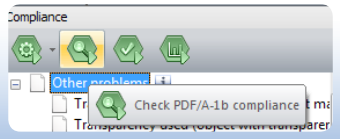
1. Open a PDF file within eCopy PDF Pro Office.
2. Click on **Document** > **Security** > **Secure Document**.
3. Click on an available security theme and perform a right mouse-click to access a shortcut menu.
4. Click on **Apply Security Theme**.

PDF/A Compliance

Create PDF/A documents directly from the Save As menu, and verify compliance.

1. Select **Save As** > **PDF/A**
2. Select **PFD/A** type in **Settings**
3. The PDF/A compliance checker will run automatically and identify any errors
4. Fix errors if necessary and re-save





Search a PDF

Using the intelligent "Looks Like" Search capability provides the option to quickly find content, like phone numbers, email addresses, and social security numbers, via an alphanumeric pattern rather than exact text.

Predefined Pattern

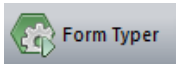
1. Open PDF within eCopy PDF Pro Office.
2. Select **Edit** > **Search** from the Menu bar.
3. Select the **Looks Like Search Pattern** radio button.
4. Select a predefined pattern from the drop-down Menu.
5. Click **Search**.

Create a Fillable Form

Create fillable forms with a click of a button using FormTyper and easily export data from forms in a variety of formats.

Creating a fillable form

1. Open PDF form within eCopy PDF Pro Office
2. Select **Forms** > **Form Typer**
3. Select **File** > **Save As PDF** or **Word Form** to save the file



Exporting text from forms

1. Open form within eCopy PDF Pro Office
2. Select **Forms** > **Export Data** from Form
3. Select **Export Format**
4. Save as selected file format

Exporting text from multiple forms

1. Open form within eCopy PDF Pro Office
2. Select **Forms** > **Export Data From Multiple Forms**
3. Add Forms for batch processing
4. Select **Export**
5. Select Export format (.csv or .xml)
4. Save as selected file format

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