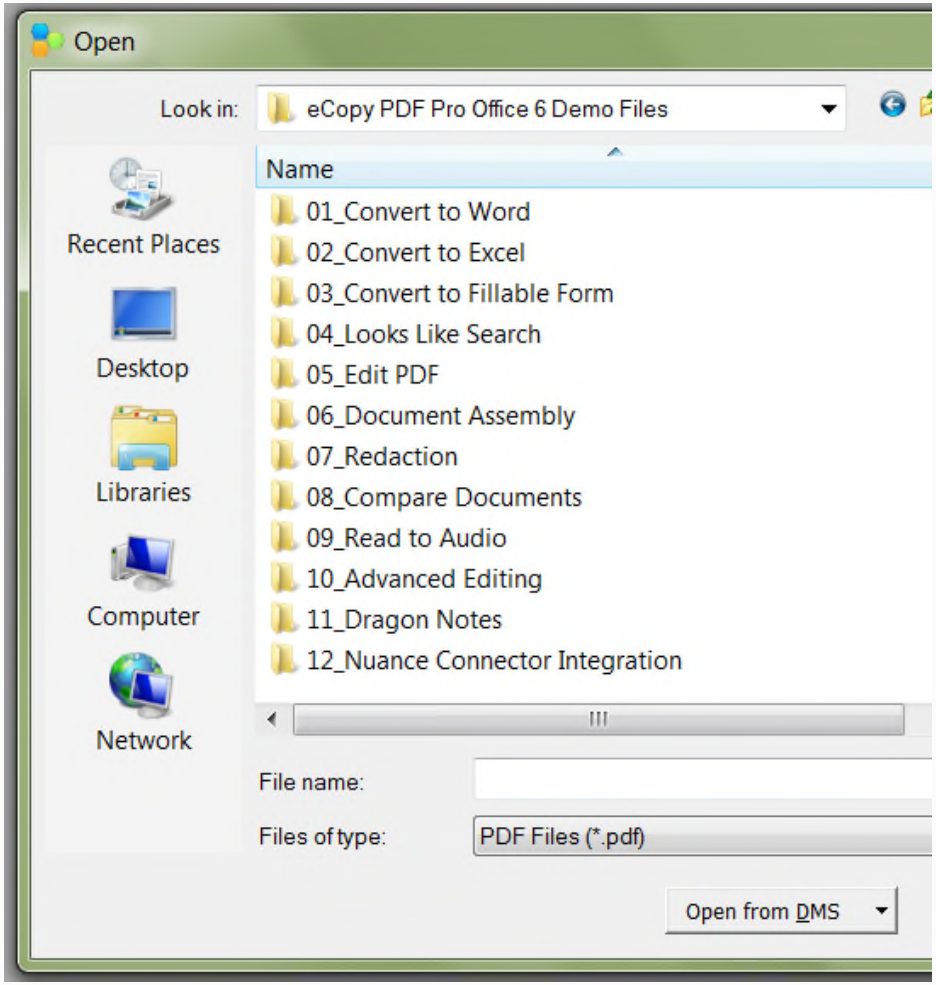
eCopy PDF Pro Office 6

Features Demonstration Guide

Demo Files – Getting Started

- All files are located in the “ePPO 6 Demo Files” folder

- There are 12 demo folders each containing the appropriate files:
    1. Convert to Word
    2. Convert to Excel
    3. Convert to Fillable Form
    4. Looks Like Search (with auto markup)
    5. Edit PDF
    6. Document Assembly
    7. Redaction
    8. Compare Documents
    9. Read to Audio
    10. Advanced Editing
    11. Dragon Notes
    12. Nuance Connector Integration



- Follow the directions in the rest of this presentation that corresponds to each demo

Document Conversion

“eCopy PDF Pro Office produces the most accurate conversion of PDF and scanned PDF files over any other software in the market today”

Why is document conversion needed?

– Scanned PDF files is simply an “image” of the original and contains no text or document formatting information

– Even PDF files created from application files don’t keep all the document information of the original document format (e.g., paragraph returns, formulas, etc.)

– This makes PDF documents challenging to edit from top to bottom

What’s the benefit of document conversion?

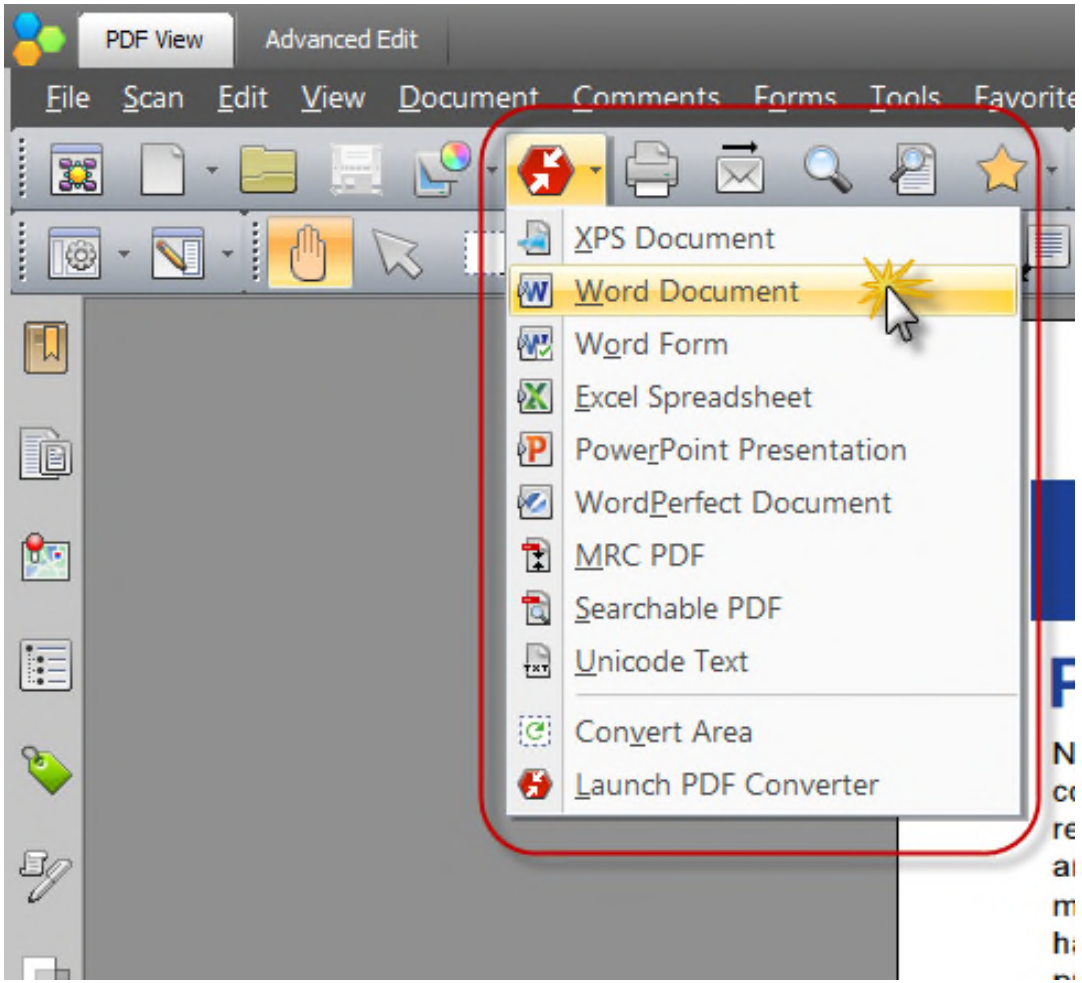
– Typing a typical 20 page, 6000 word document, takes about 150 minutes (21/2 hours) for the average person – costing as much as $60 in time and effort

– eCopy PDF Pro Office can automatically recreate the same document as an editable digital document in less than 2 minutes

– eCopy PDF Pro Office can also save as much as $250 per document by accurately reproducing columns, graphics and tables in complex documents

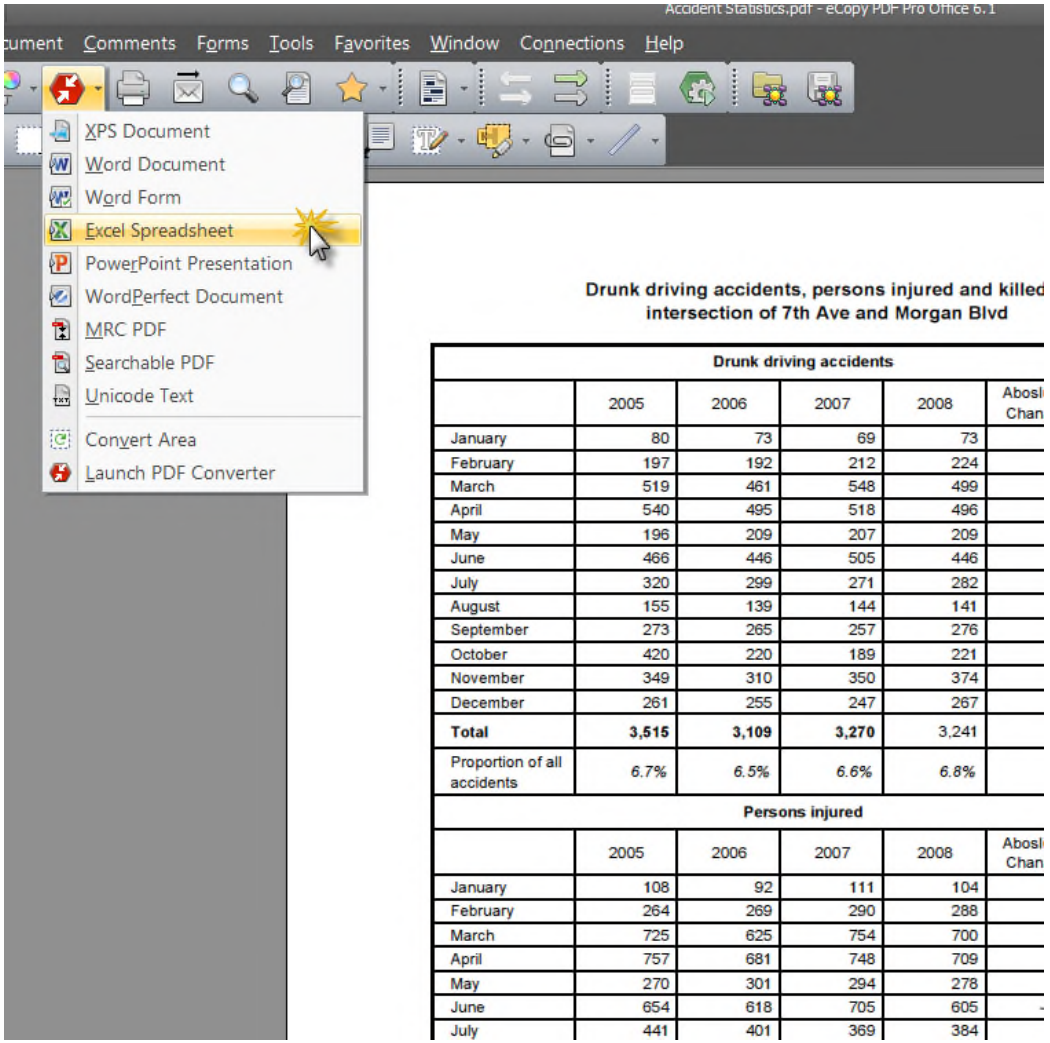
Demo 1 – Convert to Word

1. From inside of eCopy PDF Pro Office, go to File > Open and browse to the "**Convert to Word**" folder, then open **Convert to MS Word.pdf**.
2. Select "Word Document" located under the "Quick Convert" button sub-menu.
3. The PDF document will be converted and opened in Microsoft Word.
4. Things to observe in this demonstration:
   - Conversion accuracy of layout including colors, tables, columns, and graphics



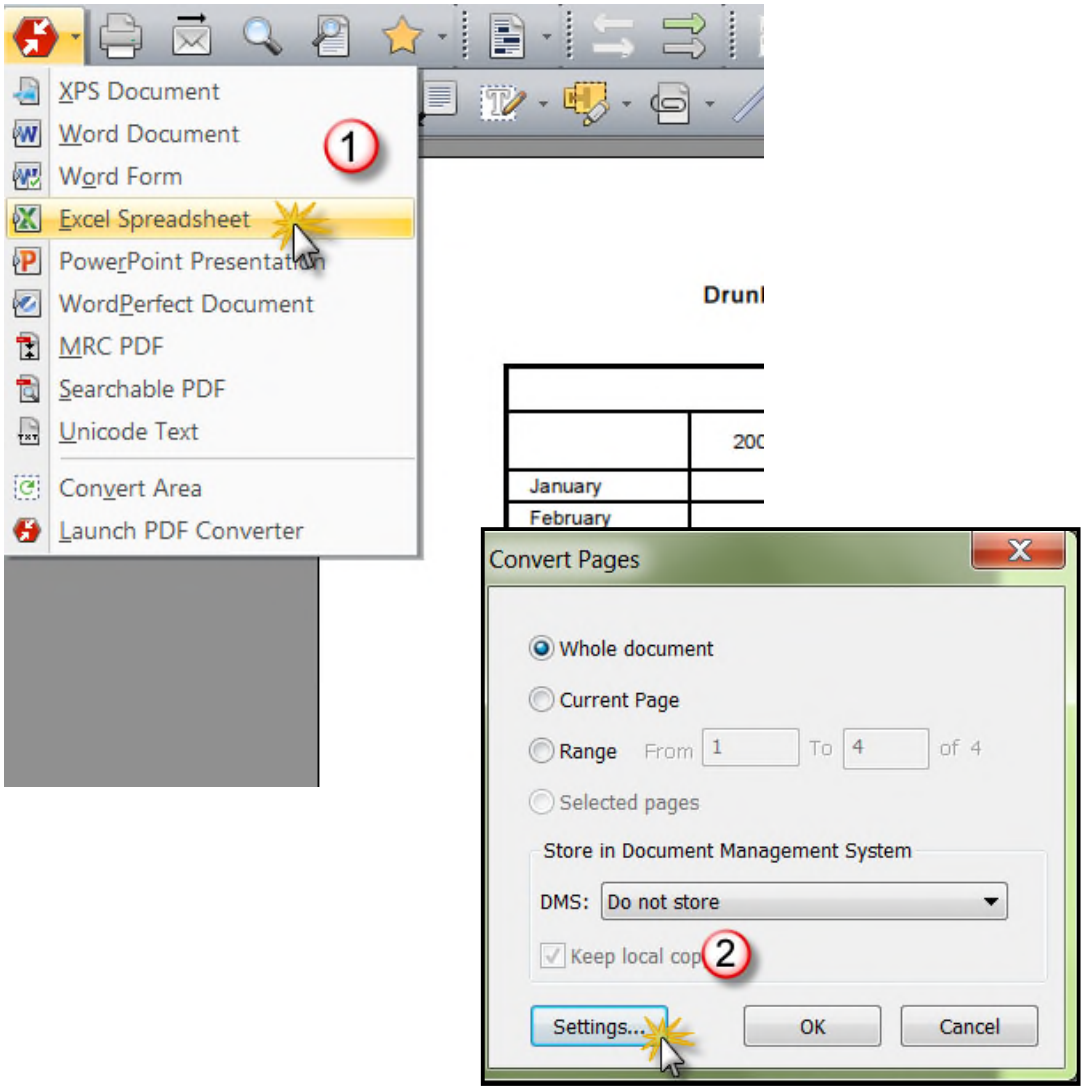
Demo 2 - Convert to Excel

- In this demo we will be showing how a multi-page PDF file will be converted to a single Excel worksheet.
- The default of eCopy PDF Pro Office using the “Quick Convert” button is set to *automatically* convert individual pages into separate worksheets.
- To control the EXCEL conversion options, follow the steps outlined in this demo on the following pages.



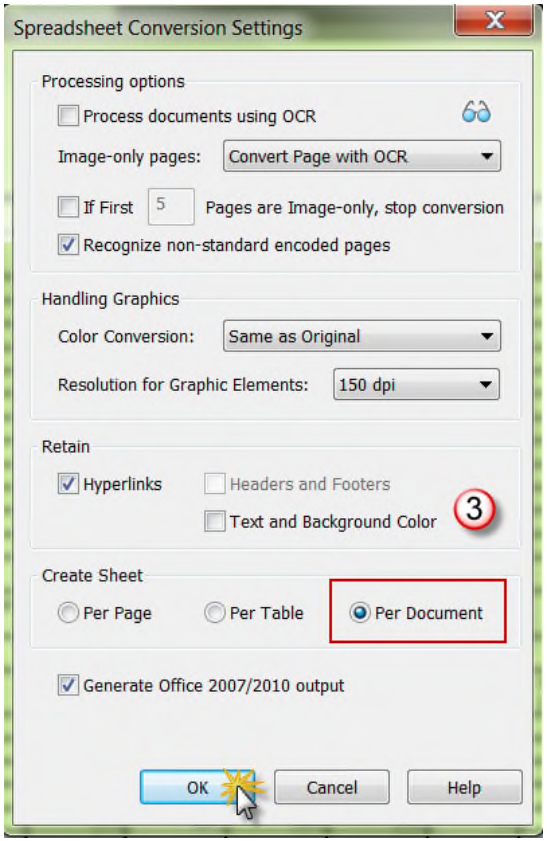
Demo 2 – Convert to Excel (Step 1)

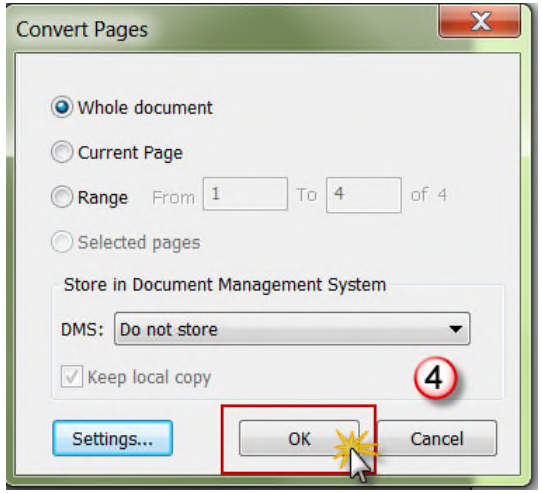
1. From inside of eCopy PDF Pro Office, open the file in the "**Convert to Excel**" folder.
2. Select "Excel Spreadsheet" located under the "Quick Convert" button sub-menu. (1)
3. In the Convert Pages dialogue box click the "Settings" button. (2)



Demo 2 – Convert to Excel (Step 2)

4. In the Spreadsheet Conversion Settings dialogue box, under “Create Sheet” select “Per Document” and click “OK”. (3)
5. In the Convert Pages dialogue box, click “OK”. (4)
6. Name and Save your file.
7. The document will be converted and opened in Microsoft Excel.
8. Things to observe in this demonstration:
   - Accuracy of layout conversion including number formats, colors, borders and graphics.
   - The multipage PDF table is converted into a single worksheet because “Per Document” was selected as the conversion option.
   - Selecting the “Per Page” option will convert your multipage PDF into a Microsoft Excel Workbook, creating a worksheet tab for each page.





Automating Form Processes

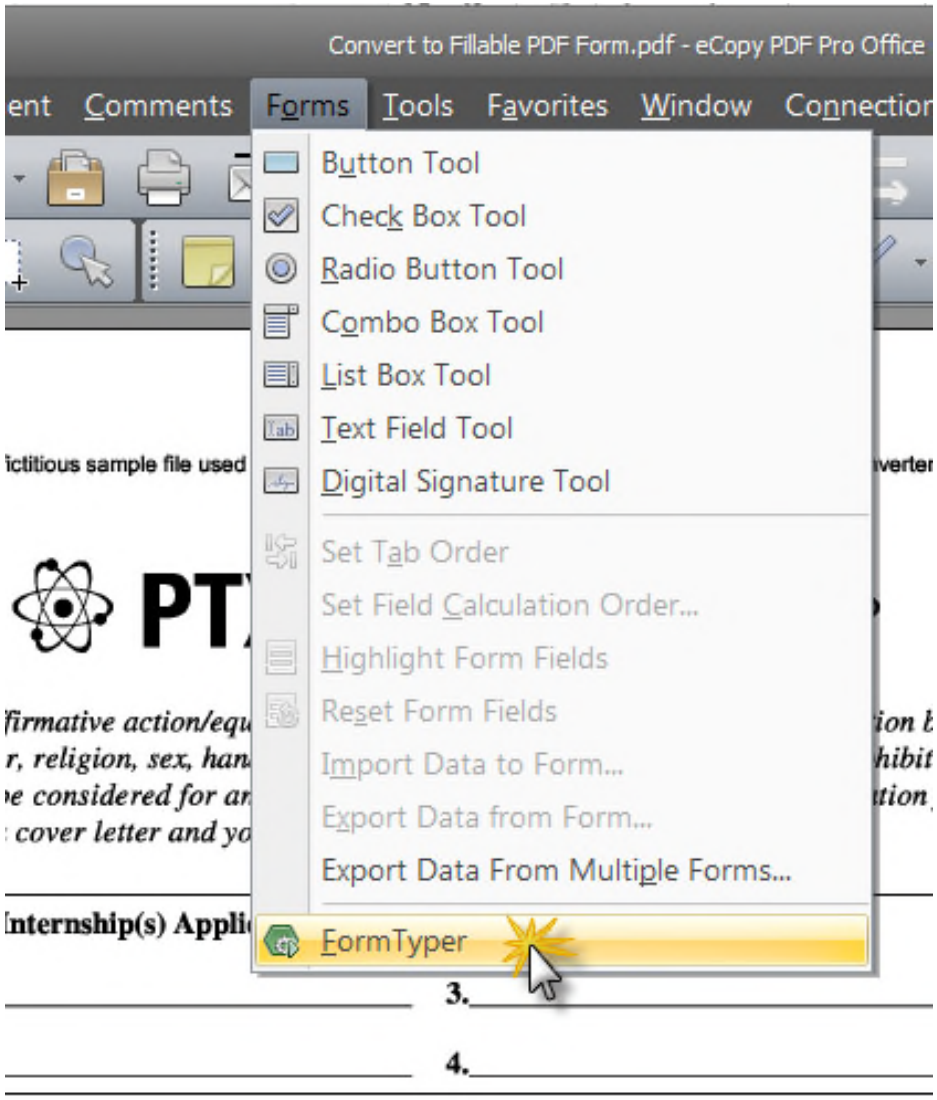
“eCopy PDF Pro Office uses special technology to automatically identify form field areas on a scanned or non-fillable PDF form”

- **Why is forms recognition needed?**
  - Non-fillable forms are everywhere – paper and online as PDF documents
  - Forms filled in by hand can be hard or even impossible to read
  - Forms printed on paper can get lost or damaged

- **What’s the benefit of automatic form recognition?**
  - When forms are reassigned from paper distribution to digital distribution and collaboration, it can reduce the cost of forms 30% to 40%
  - A business with $10M in revenue can save $180K to $240K per year by using PDF forms
  - 7.5% of all documents get lost completely but eCopy PDF Pro Office can save, on average, $101 a week per knowledge worker, by making documents accessible as PDF forms
  - Companies can save, on average, $20 on labor per document by filing using electronic methods instead of filing and organizing paper forms

Demo 3 – Convert to Fillable Form

1. Open the file in the "**Convert to Fillable Form**" folder in eCopy PDF Pro Office.
2. Select "FormTyper" under the Forms menu.
3. The document will be converted in-place and you can now fill in data in the form fields.
4. Things to observe in this demonstration:
   - Accuracy of automatically identifying form elements including text fields and check boxes.
   - If you fill in the form and then save a copy, the next time you run the demo, eCopy PDF Pro Office will remember your entries so you can quickly auto-fill the next form.



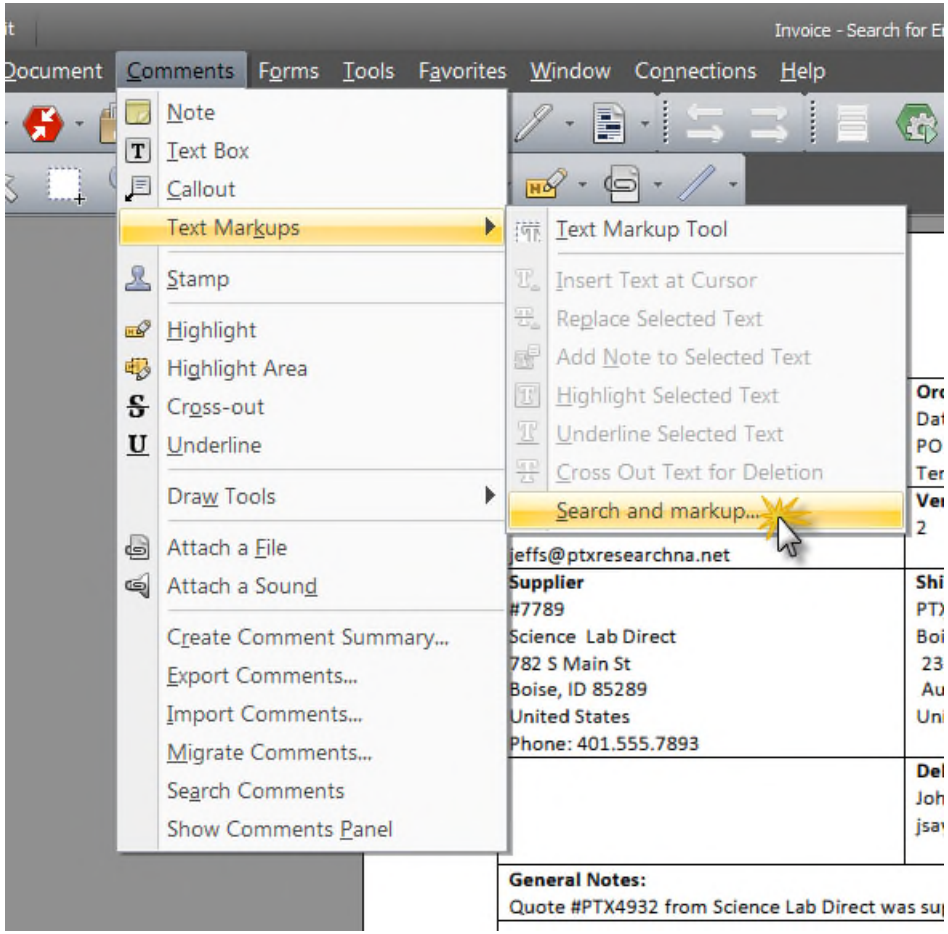
Finding What You Need - Fast

“eCopy PDF Pro Office uses a new way to search based on patterns or what text “looks like”, such as an email address or credit card number”

- Why is a “looks like search” needed?
  - Case managers, project managers, customer service agents, financial and legal professionals deal with a large assortment of information
  - The exact piece of information may not be known, but the user knows it’s a “type” of information that follows a specific pattern
  - Getting search results that shows where these patterns exists in a document quickly speeds up the search process
- What’s the benefit of a smarter way to search?
  - Better digital tools reduce the need for paper-based documents
  - Almost 80% of today’s information is still paper-based
  - 18 minutes is the average search time for a paper document
  - Even when paper is properly filed, the average time to retrieve and re-file a paper document is 10 minutes

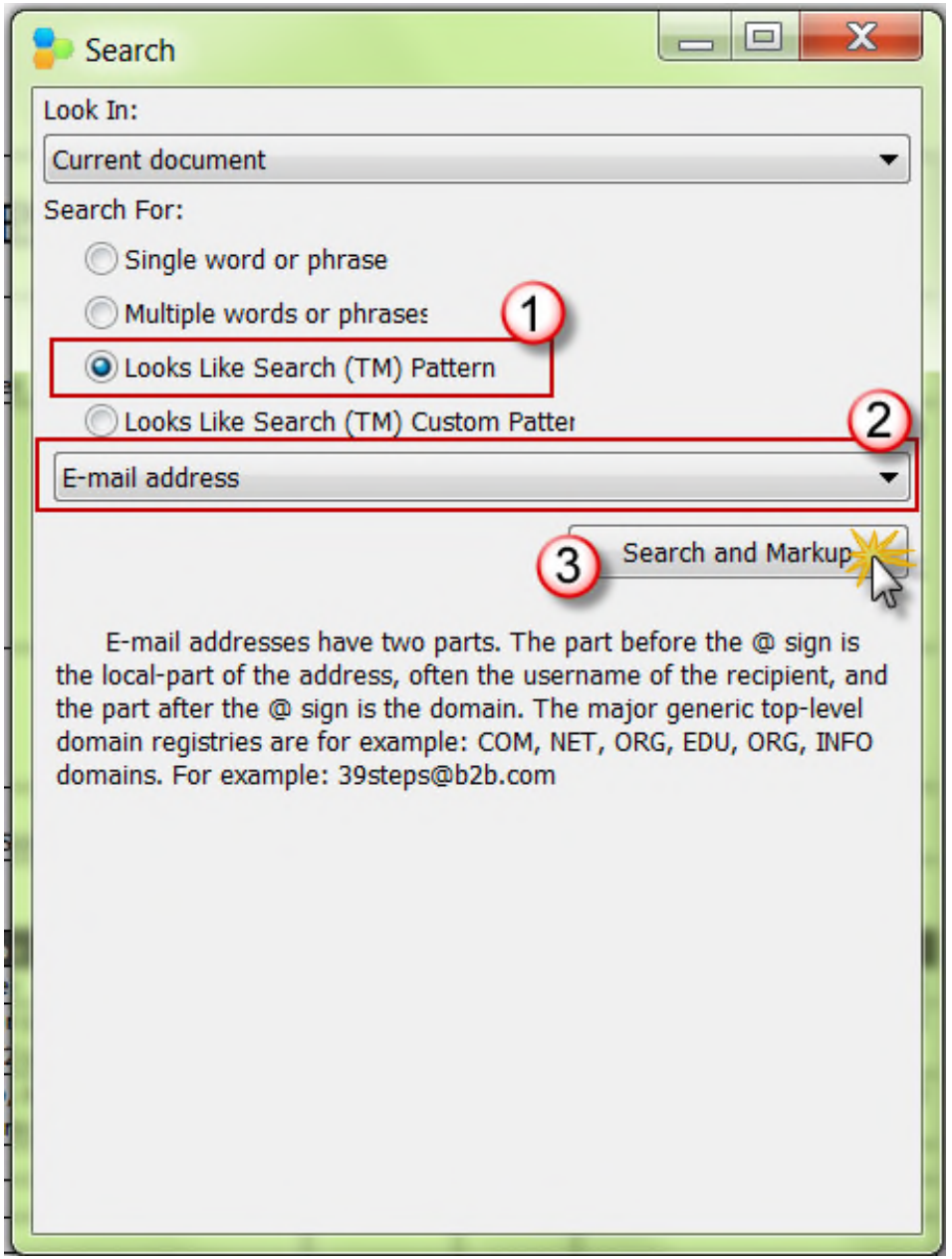
Demo 4 – Looks Like Search™ w/Auto Markup (Step 1)

1. Open the file in the "**Looks Like Search**" folder in eCopy PDF Pro Office.
2. In this demo we will actually be demonstrating two features at once:
   - Looks Like Search
   - Auto Highlight (Markup)
3. Under the Comments > Text Markups sub-menu, select "Search and markup".



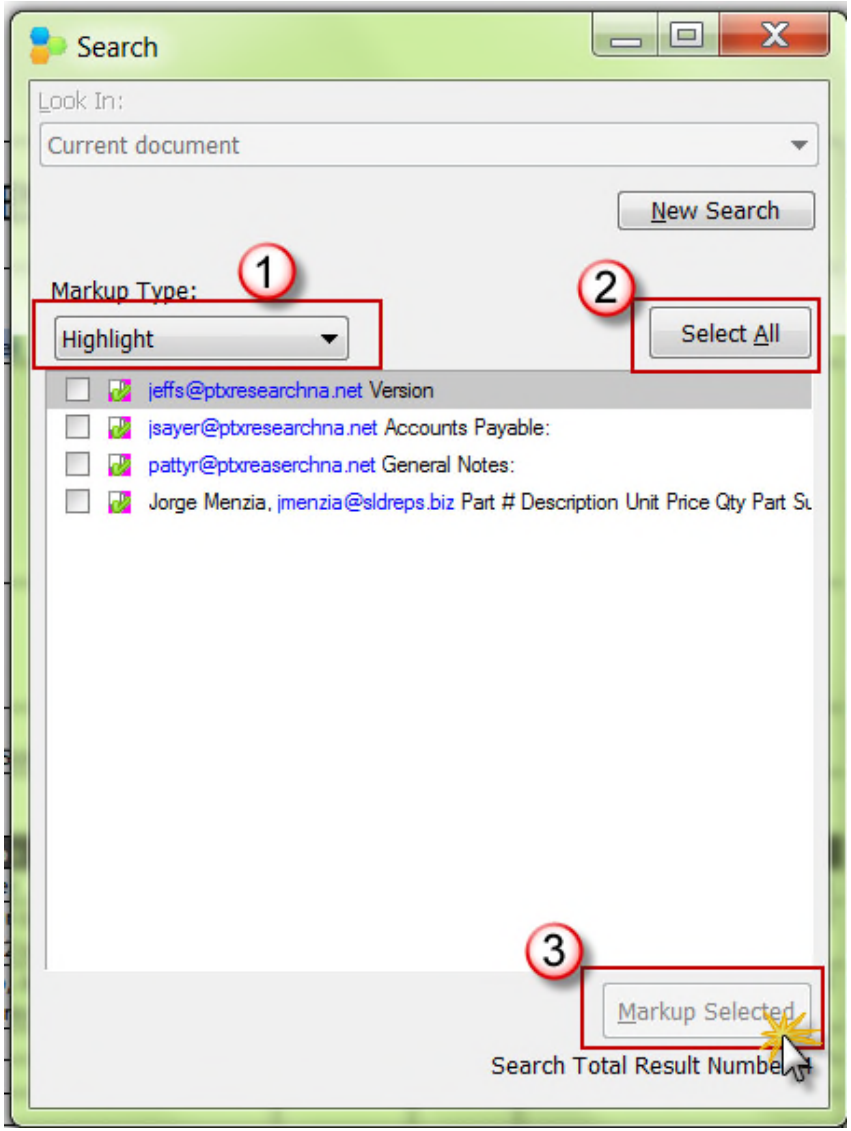
Demo 4 – Looks Like Search™ w/Auto Markup (Step 2)

4. In the “Search” dialog, click on the “Looks Like Search ™ Pattern” option (1).
5. In the drop down box select “Email address”. This is the pattern that will be searched. (2)
6. Click the “Search and Markup” button. (3)



Demo 4 – Looks Like Search™ w/Auto Markup (Step 3)

7. In the next screen of the “Search” dialog make sure that “Highlight” is selected under Markup Type. (1)
8. Click on the “Select All” button. (2)
9. Click the “Markup Selected” button. (3)
10. All the email addresses in the document are now highlighted yellow.
11. Things to observe in this demonstration:
    - Looks Like Search is a fast and effective way to find information.
    - When combined with Auto Markup you can easily identify visibly marked information.

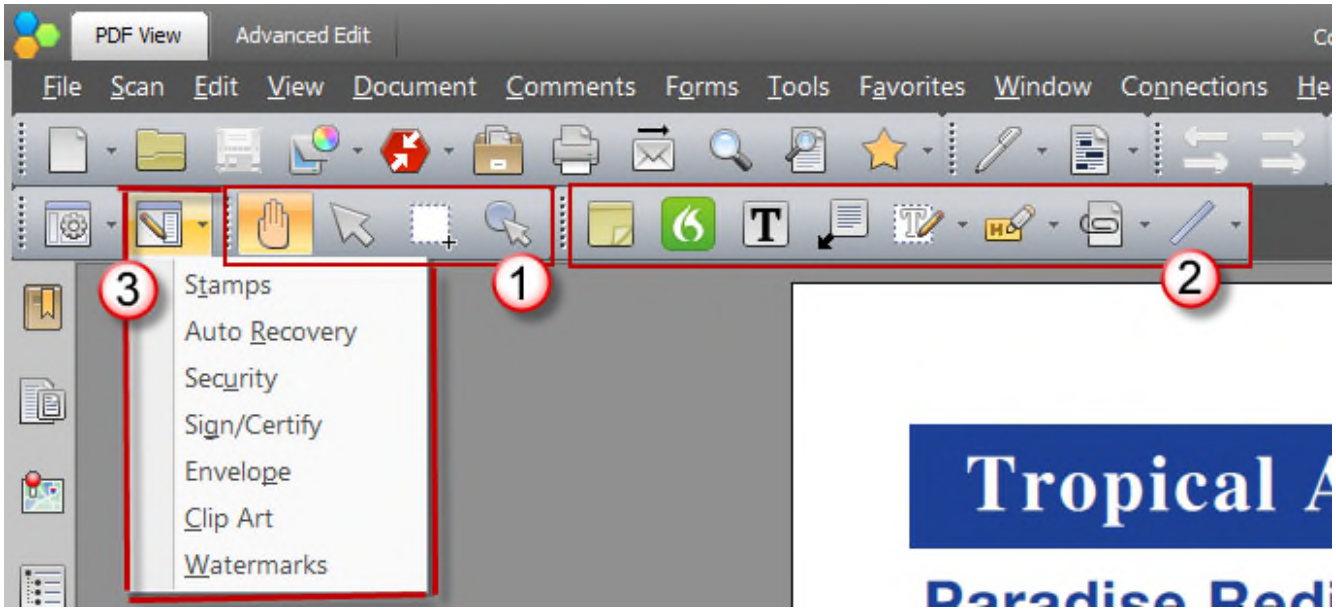


Modifying and Editing PDF Documents

“eCopy PDF Pro Office provides everything you need to quickly make changes to PDF files and provides necessary collaboration tools”

- Why might I need to edit my PDF file?
  - You need to create new PDF documents from many different existing documents
  - The original application file has been misplaced, deleted or is not in your possession
  - You want to add notes, identify information, or make other additions to the PDF that will help you communicate with multiple people through the PDF document
  - 46% of workers are motivated to collaborate because they learn from others
- What’s the benefit of modifying and editing PDFs?
  - Customers: Effective collaboration on customer-driven projects, cases or claims increases sales and customer loyalty
  - Operations, Suppliers & Channel Partners: Synchronization improves the quality of products and services
  - Stakeholders: Quality communications creates richer interactions and more complete consensus with stakeholders to whom the organization is accountable.
  - Employees: Creating a workplace that allows employees to participate in dynamic project teams empowers them to work faster and more effectively without management
  - Innovation: Collaboration generates ideas and reduces the cycle time for improvement

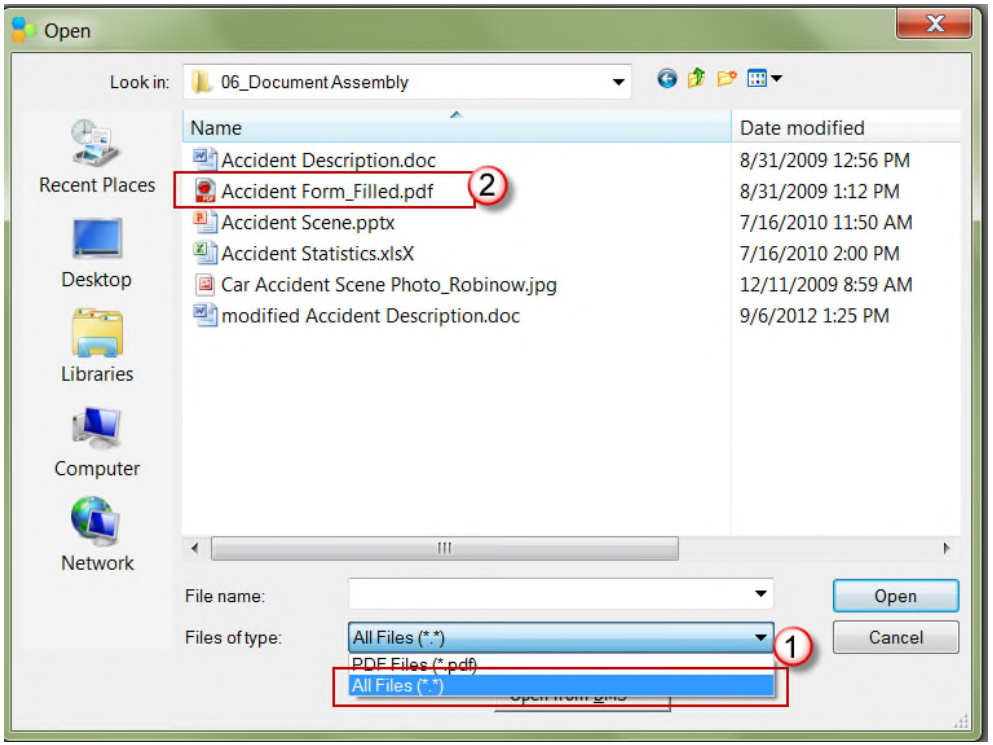
Demo 5 – Edit PDF



- There are no “automatic” editing functions to demonstrate, but you can use the PDF document in the “Edit PDF” folder to practice using the editing features.
- The purpose of this demo is to show how many of the editing tools function and it’s up to you how you want to demo them
- Consult the eCopy PDF Pro Office help files to understand how the various tools function
- Things to observe in this demonstration:
  - Editing of text and graphics in the PDF.(1)
  - Annotations such as Notes, Highlights, Callouts and Shapes. (2)
  - Some annotations, such as Stamps and Watermarks are located under the Organizer Panel sub-menu. (3)

Demo 6 – Document Assembly (Step 1)

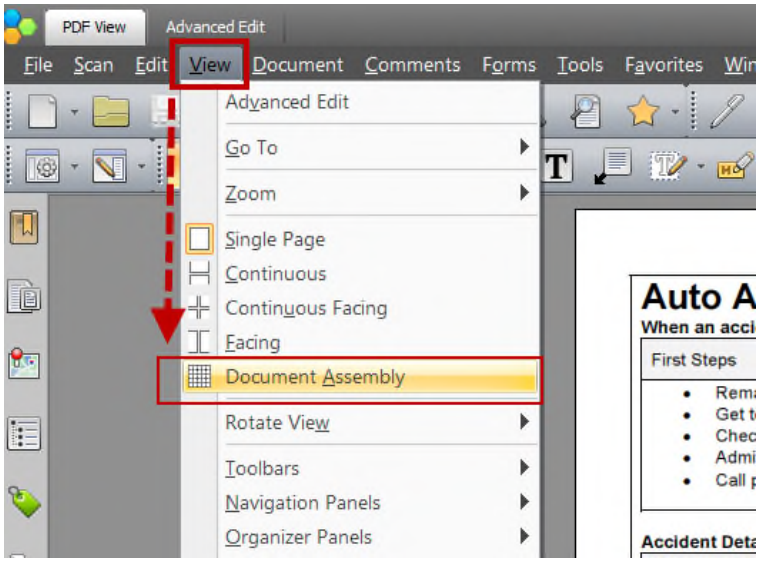
- Document Assembly creates one new multi-page PDF file from many different files
- In our example we are going to create a complete Insurance Claim Package consisting of:
  - The accident description (MS Word)
  - A claim form (PDF)
  - An accident scene diagram (MS PowerPoint)
  - Accident photo (JPG)
  - Accident statistics (MS Excel)

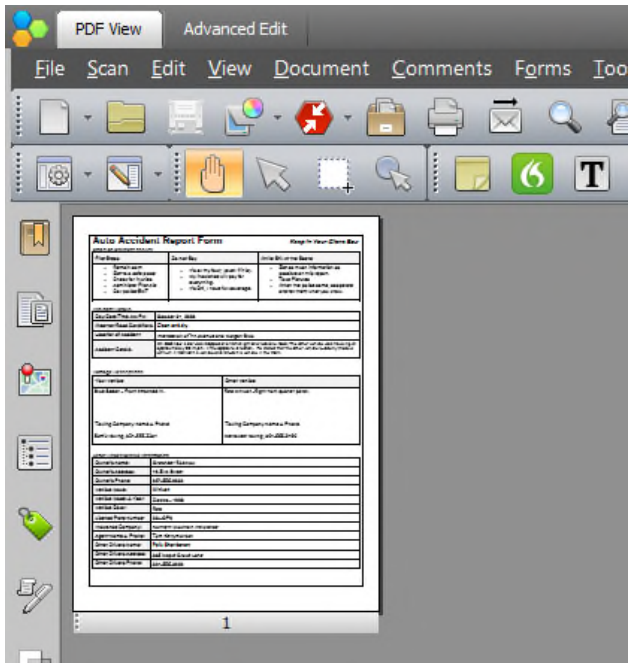


1. From inside of eCopy PDF Pro Office, browse to the “Document Assembly” folder.
2. Change the File Type to “All Files” so you can see all of the files. (1) You will see that there are several different file types in this folder.
3. Select the “Accident Form_Filled.pdf” file (2) and open it in eCopy PDF Pro Office.

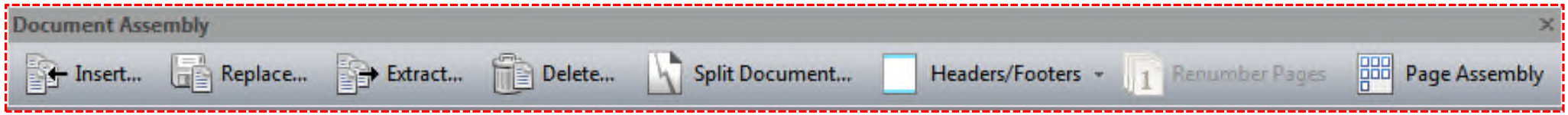
Demo 6 – Document Assembly (Step 2)

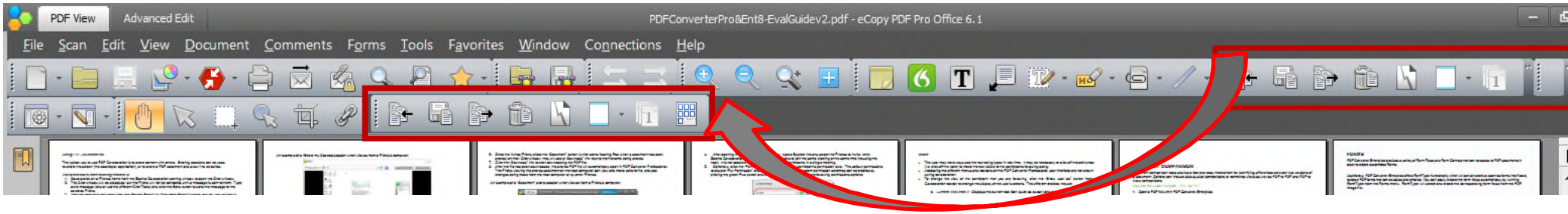
4. Now we want to add additional files to this PDF
5. Select “Document Assembly” under the “View” menu, so you can see all of the pages in your document





Demo 6 – Document Assembly (Step 3)

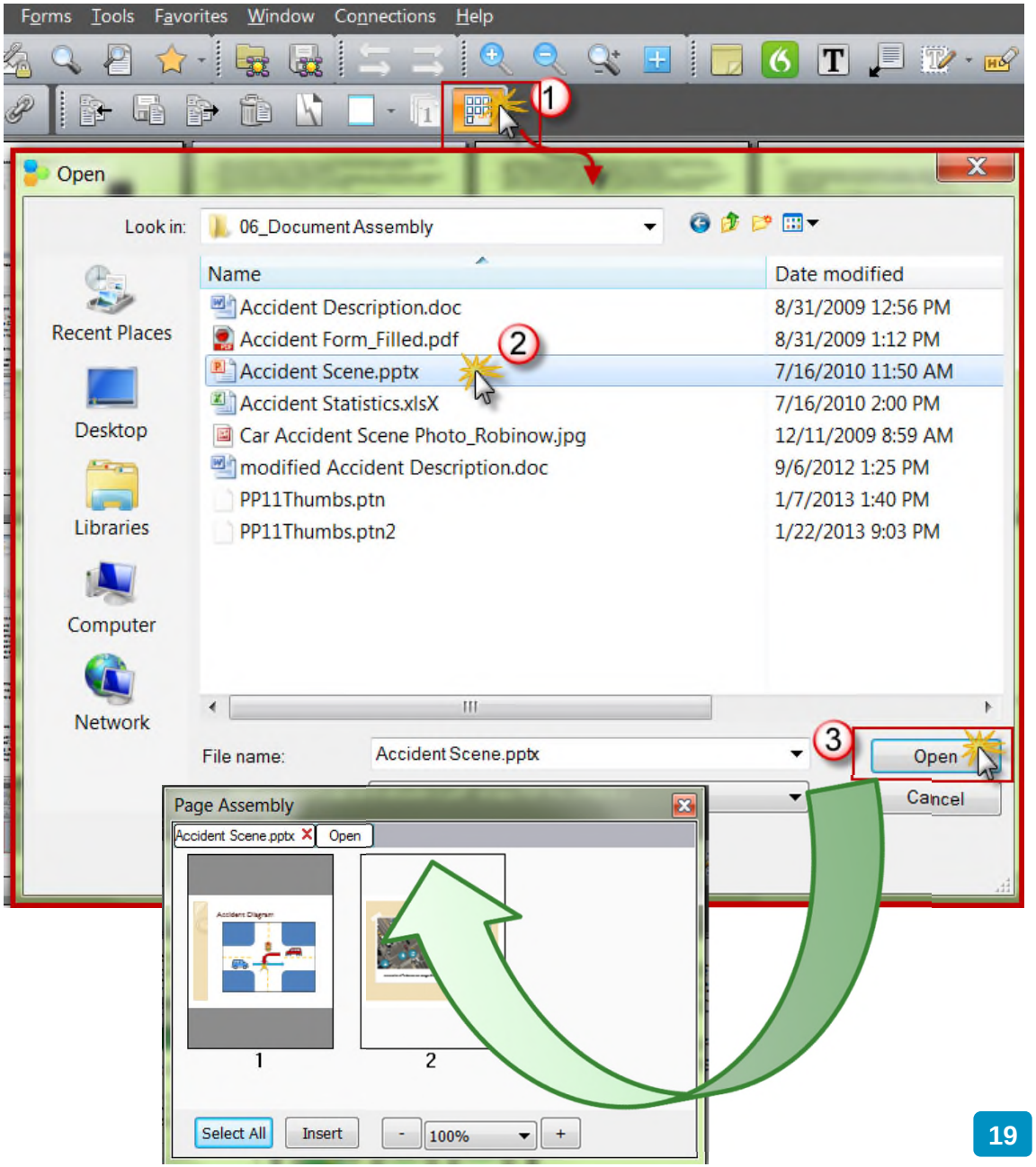




6. The “Document Assembly” view will produce a new set of toolbar options
7. If you have several toolbars open, some of the buttons on this new set of Document Assembly toolbars may be hidden
8. Simply drag the new toolbar set to the next line to provide more space and all of the buttons will appear

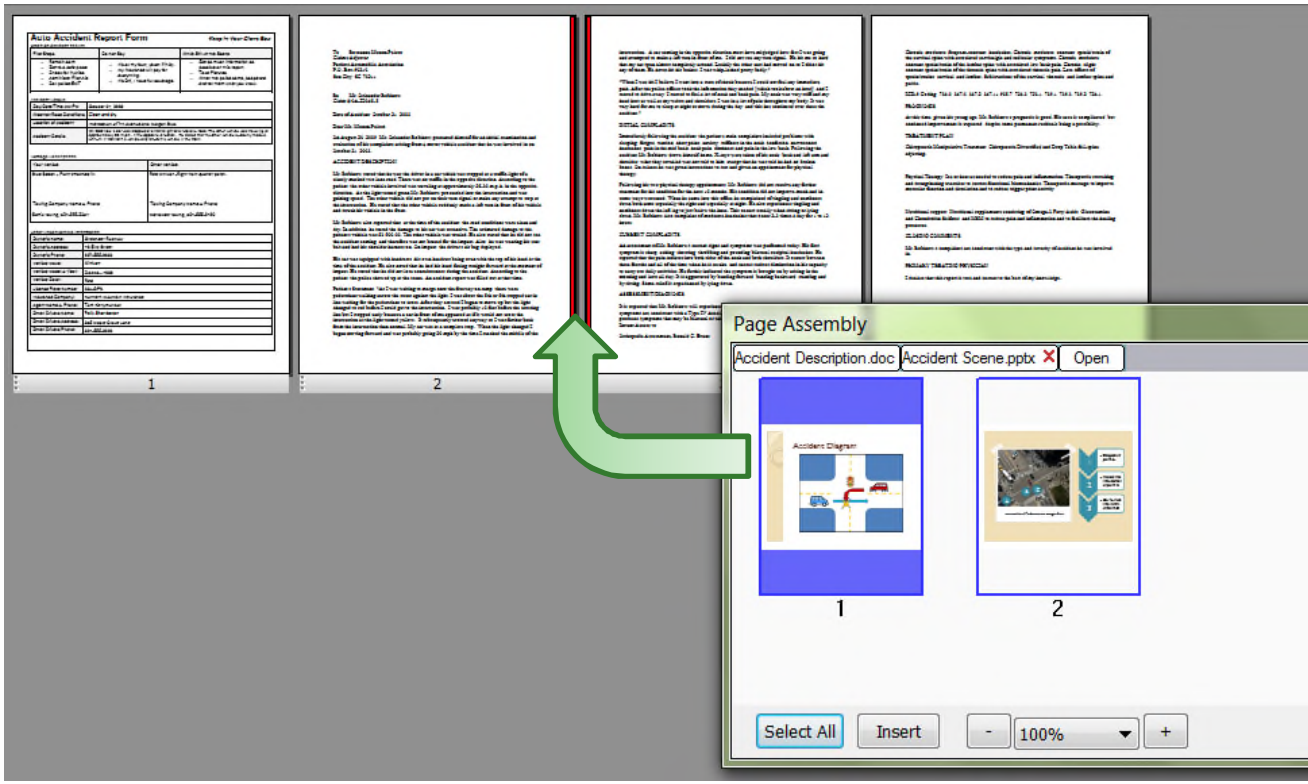
Demo 6 – Document Assembly (Step 4)

9. Next we want to open additional documents so we can move some or all of their pages into the new PDF
10. You can open the additional documents in the “Document Assembly” folder by clicking on the “Page Assembly” button (1)
11. Select the file you want to open (Accident Scene.pptx) (2)
12. Click on the “Open” button (3) and the document will open in a separate “Page Assembly” window
13. The “Page Assembly” window is movable and resizable so you can optimize your screen space.
14. In the “Page Assembly” window, click on the “Open” button and open each of the other documents in the “Document Assembly” folder. Each document will appear as its own tab in the “Page Assembly” window.



Demo 6 – Document Assembly (Step 5)

15. Once you have opened all the documents in the “Page Assembly” window you can drag and drop pages into the PDF file as you like
16. Clicking on the various tabs in the “Page Assembly” window presents each opened document and its pages
17. Experiment by dragging and dropping pages to combine files into one multi-page PDF
18. Things to observe in this demonstration:
    - The “Page Assembly” window is the best way to create a new document from several different document files.
    - You are not limited to PDF documents. You can combine documents of almost any file type.



Protecting Sensitive Information

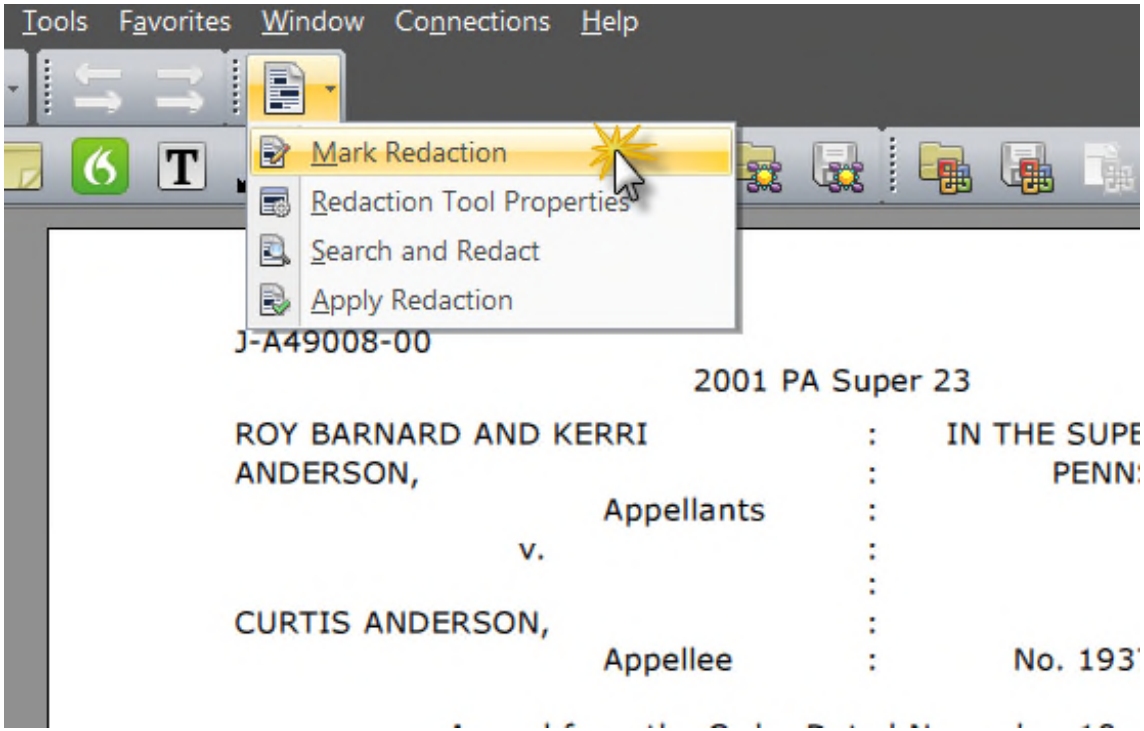
"eCopy PDF Pro offers a wide range of industry standard features to provide maximum protection for your documents"

- Why is document security so important?
  - During 2006, over 70 million identities were lost due to the corporate mishandling of personal information, which has led to over $1 billion in reported losses
  - According to one expert, the loss or theft of just one laptop can cost a company as much as $90,000 or more in fines, credit monitoring for victims, public relations damage control, and class action litigation
  - The costs of a data breach can vary widely ranging $90 to $305 per customer record, depending on whether the company is in a non-regulated or highly regulated area, such as banking
  - Lost employee productively is estimated at a range from $20 to $30 per compromised customer record
- What's the benefit to document security?
  - Cost savings: Exposure of customer, partner, vendor or employee information is far more expensive to everyone concerned than necessary safeguard to prevent compromised data
  - Credibility: Damage done by information leaks or data loss can permanently affect an organization's ability to keep current customers or find new business
  - Compliance: In regulated industries such as finance, healthcare and legal, it's simply required by law – and there is a good reason for that

Demo 7 – Redaction (Step 1)

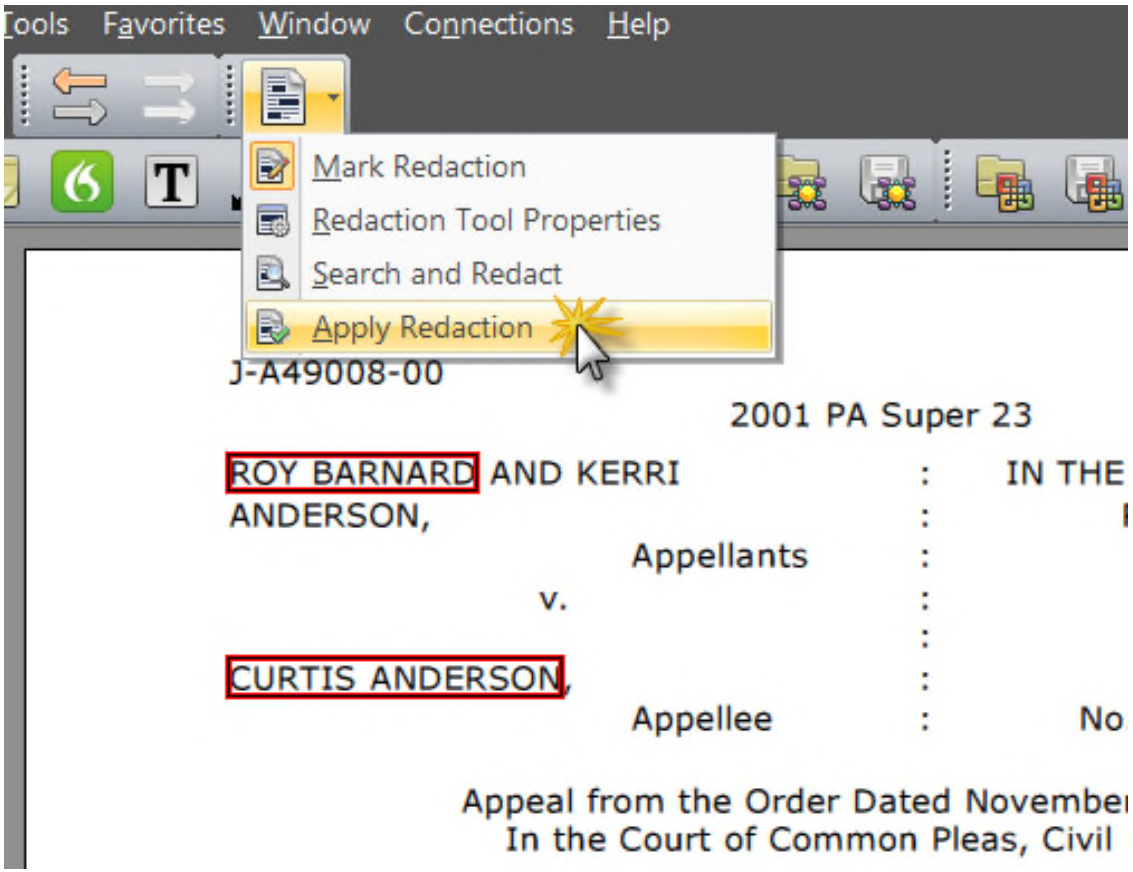
- Redaction is a specialized feature designed to “black-out” AND completely remove sensitive data from a document

1. Open the file in the “**Redaction**” folder
2. Select “Mark Redaction” under the Redaction tool sub-menu or by going to Document > Redaction > Mark Redaction
3. Use your mouse to select or “highlight” text for redaction



Demo 7 – Redaction (Step 2)

4. Areas marked for redaction appear as red outlined boxes
5. Text (and corresponding data) has not been redacted from the document yet
6. You must select “Apply Redaction” located under the Redaction tool sub-menu or by going to Document > Redaction > Apply Redaction
7. Follow all the next prompts by accepting the defaults until the process is complete
8. Things to observe in this demonstration:
   - Redaction will COMPLETELY eliminate all traces of the sensitive information from the document providing maximum security
   - Search and Redact can quickly automate the task of redaction



Additional Productivity Features

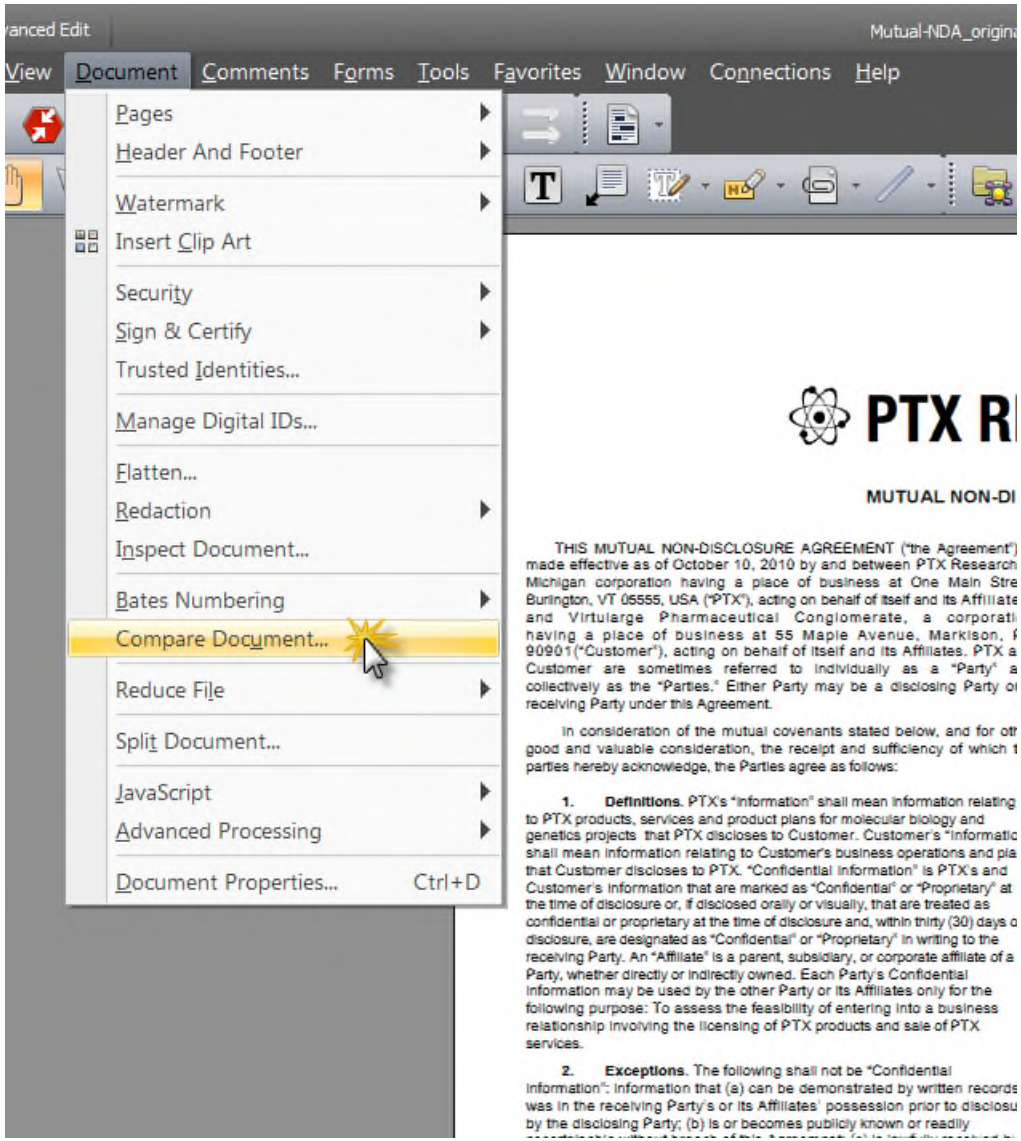
“eCopy PDF Pro Office delivers numerous features designed to increase individual and departmental productivity within any organization”

- Why are all these productivity features important?
  - PDF is used for a variety of reasons including:
    - Scanning paper
    - Archiving and securing information
    - Sharing documents internally and externally
  - Requirements of PDF applications are often specific to critical business use cases
- What’s the benefits to having so many features in eCopy PDF Pro Office?
  - Flexibility: Allows eCopy PDF Pro Office to be put on every desktop in the organization, not just those who are scanning
  - Productivity: Do more things with PDF documents in less time
  - Cost savings: There is no need to buy more than one PDF application for any organization because eCopy PDF Pro Office does it all
  - Best MFP scanning product: Only eCopy PDF Pro Office integrates with the eCopy ShareScan platform for the easiest scan-to-desktop solution

Demo 8 – Document Comparison (Step 1)

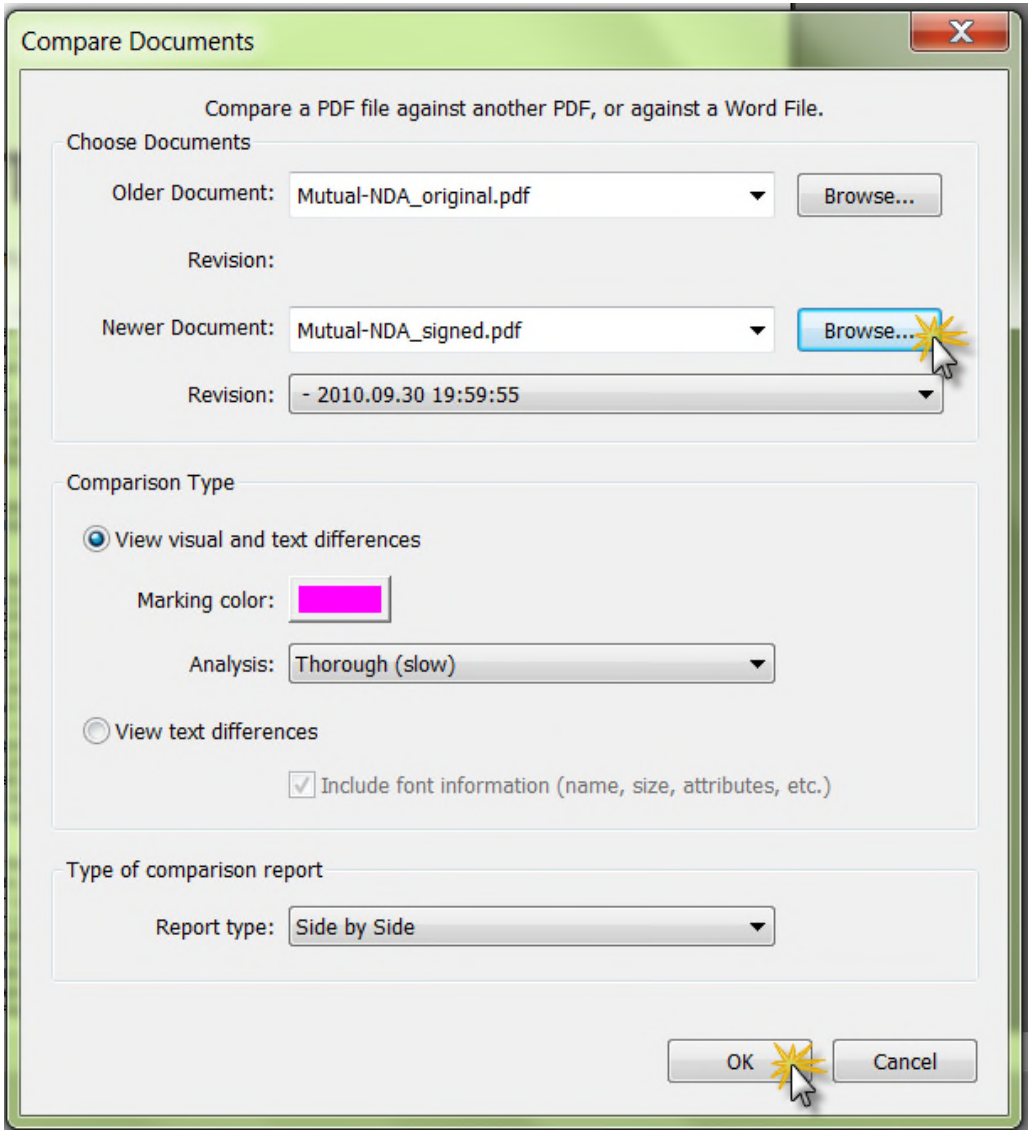
- "Document Compare" is a feature that allows you to compare two versions of the same document to see what's changed

1. Open the "**Mutual-NDA_orginal.pdf**" sample in the "Compare Documents" folder
2. Select "Compare Document…" under the Document menu



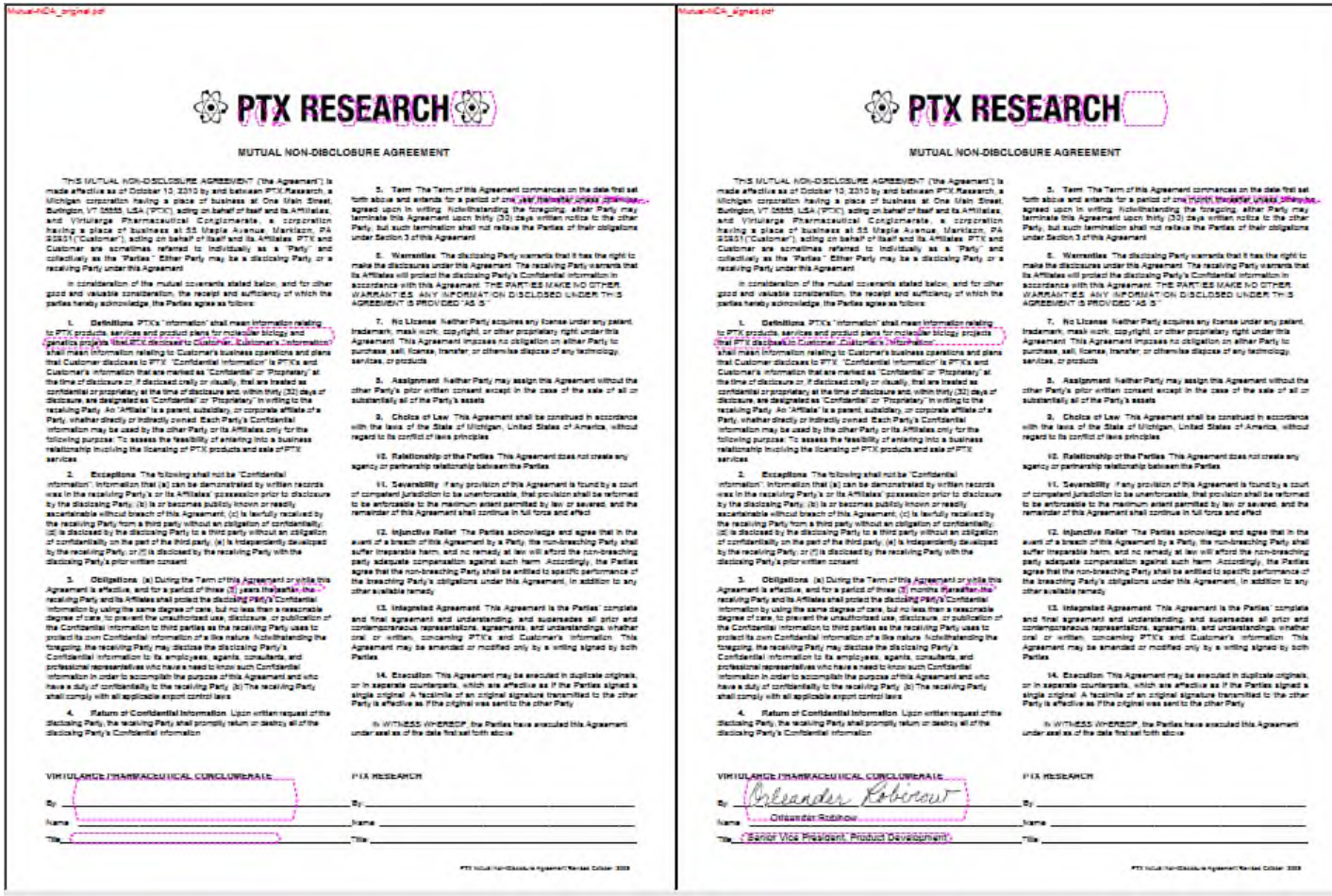
Demo 8 – Document Comparison (Step 2)

3. Under the “Choose Document” section of the Compare Documents dialog box, click on the “Browse” to open the newer of the two documents
4. Open the “**Mutual-NDA_signed.pdf**” sample in the “Compare Documents” folder
5. Under the “Comparison Type” section, be sure your settings match what is selected in the image on the right
6. Click on “OK”



Demo 8 – Document Comparison (Step 3)

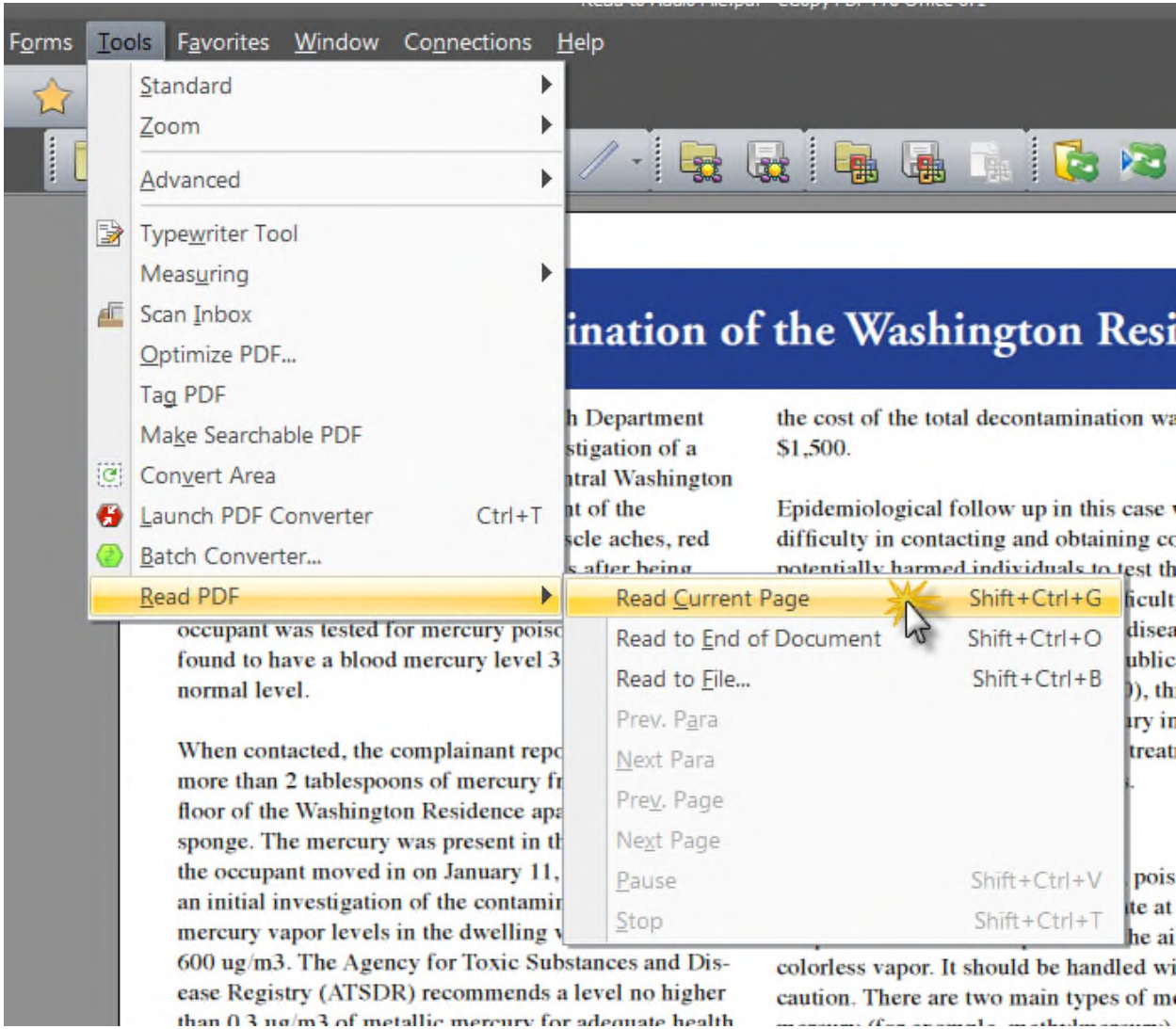
7. eCopy PDF Pro Office produces a PDF report that shows you exactly what's been changed in the document
8. Things to observe in this demonstration:
   - This feature can identify text changes AND image changes
   - You can also compare a WORD document to a PDF file



Demo 9 – Read to Audio

- Read PDF is a feature that will read the text in your PDF in a natural sounding voice

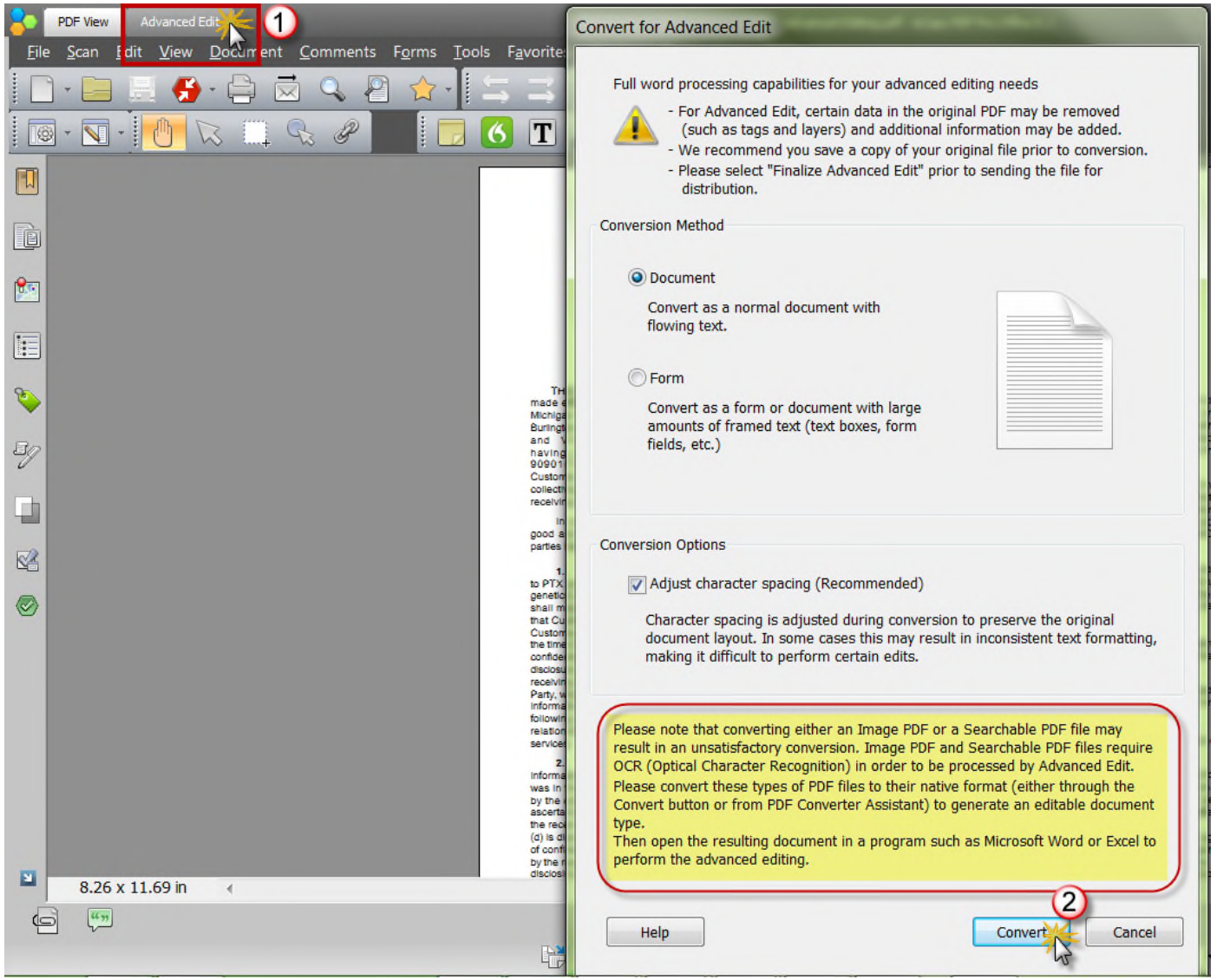
1. Open the file in the "**Read to Audio**" folder
2. Select "Read Current Page" or "Read to File" under the Tools > Read PDF sub-menu
3. "Read Current Page" will launch the Audio option and begin reading the document aloud and "Read to File" will create a .wav file for play-back
4. Things to observe in this demonstration:
    - This is very helpful for visually impaired users
    - This allows you to listen to the document in a place where reading is difficult or impossible – like your car



Demo 10 - Advanced Editing (Step 1)

The new Advanced Edit tab converts and displays PDF documents into fully editable files at the click of a button

1. Open the "**Advanced Editing**" sample from the "Advanced Editing" folder
2. Click on the "Advanced Edit" (1) tab to unlock the text objects in the PDF file
3. Click the "Convert" (2) button to convert the file into an editable PDF document

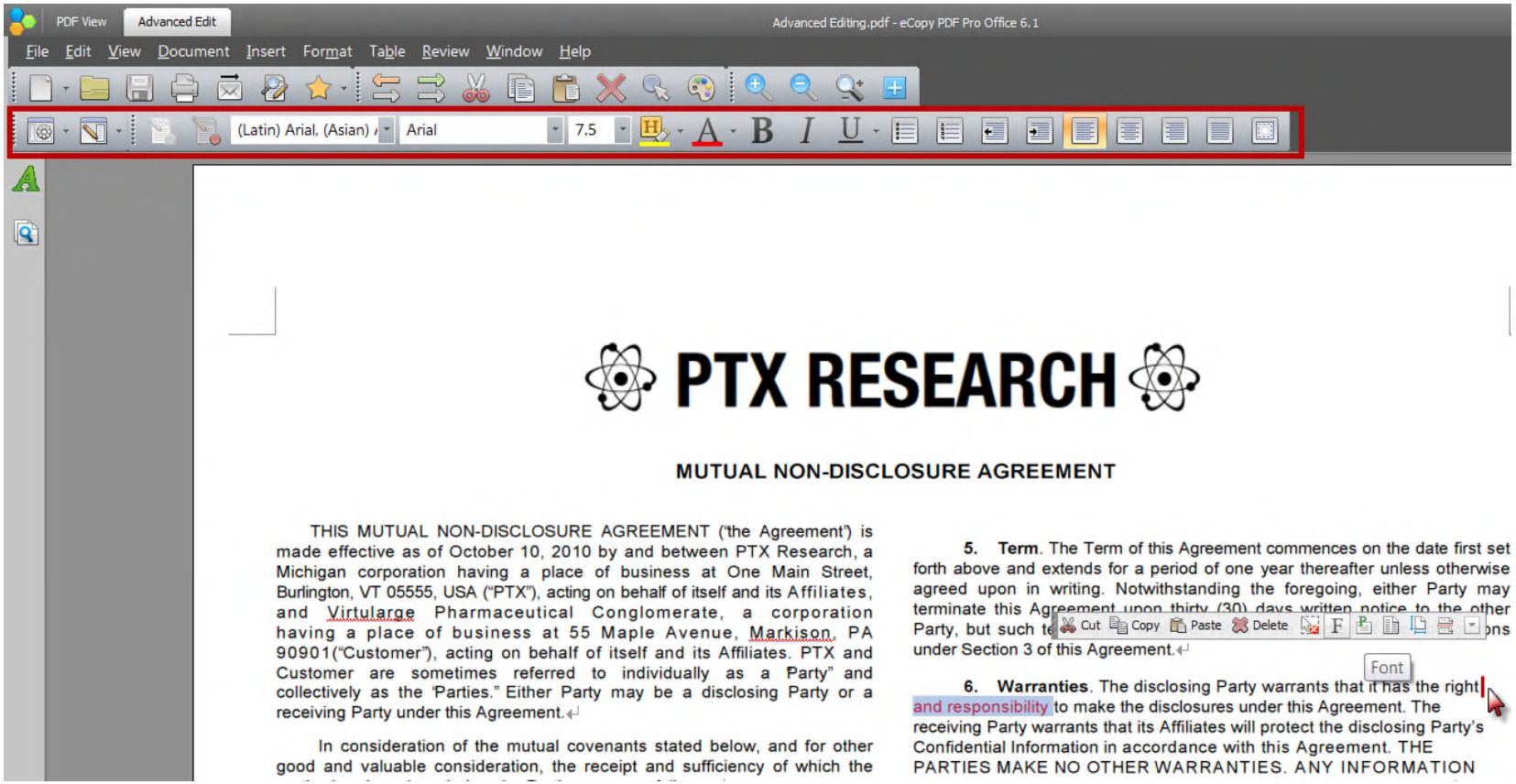


Demo 10 – Advanced Editing

Once you are in the Advanced Edit mode, you will see that you now have access to word processing type options for you to make more complex edits to your PDF file than ever before

1. **Convert for Advanced Edit:** Only available after using the Finalize Advanced Edit button.
2. **Finalize Advanced Edit:** Makes the changes made in the Advanced Edit mode permanent and removes metadata from the document.
3. **Paragraph Style List:** Adjusts the style of the selected text.
4. **Font:** Changes the font type of the selected text.
5. **Font Size:** Changes the font size of the selected text.
6. **Highlight tool:** Highlights the selected text. Select the drop-down arrow to change the highlight color.
7. **Font color:** Changes the font color of the selected text.
8. **Bold:** Bolds the selected text.
9. **Italics:** Italicizes the selected text.
10. **Underline:** Underlines the selected text.
11. **Bullets:** Creates an unordered bullet list.
12. **Numbering:** Creates an ordered numbered list.
13. **Decrease indent:** Decrease the line indent.
14. **Increase indent:** Increase the line indent.
15. **Left alignment:** Align the selected text to the left margin.
16. **Centered alignment:** Align the selected text to the center of the document.
17. **Right alignment:** Align the selected text to the right margin.
18. **Justified alignment:** Extend the selected text to both margins.
19. **Borders and Shading:** Adjust the borders and shading properties of the document. The Borders and Shading dialog allows the user to select the type of border along with the color and style of the line, or the shading color to be used, and then apply those changes to specific areas of the document.

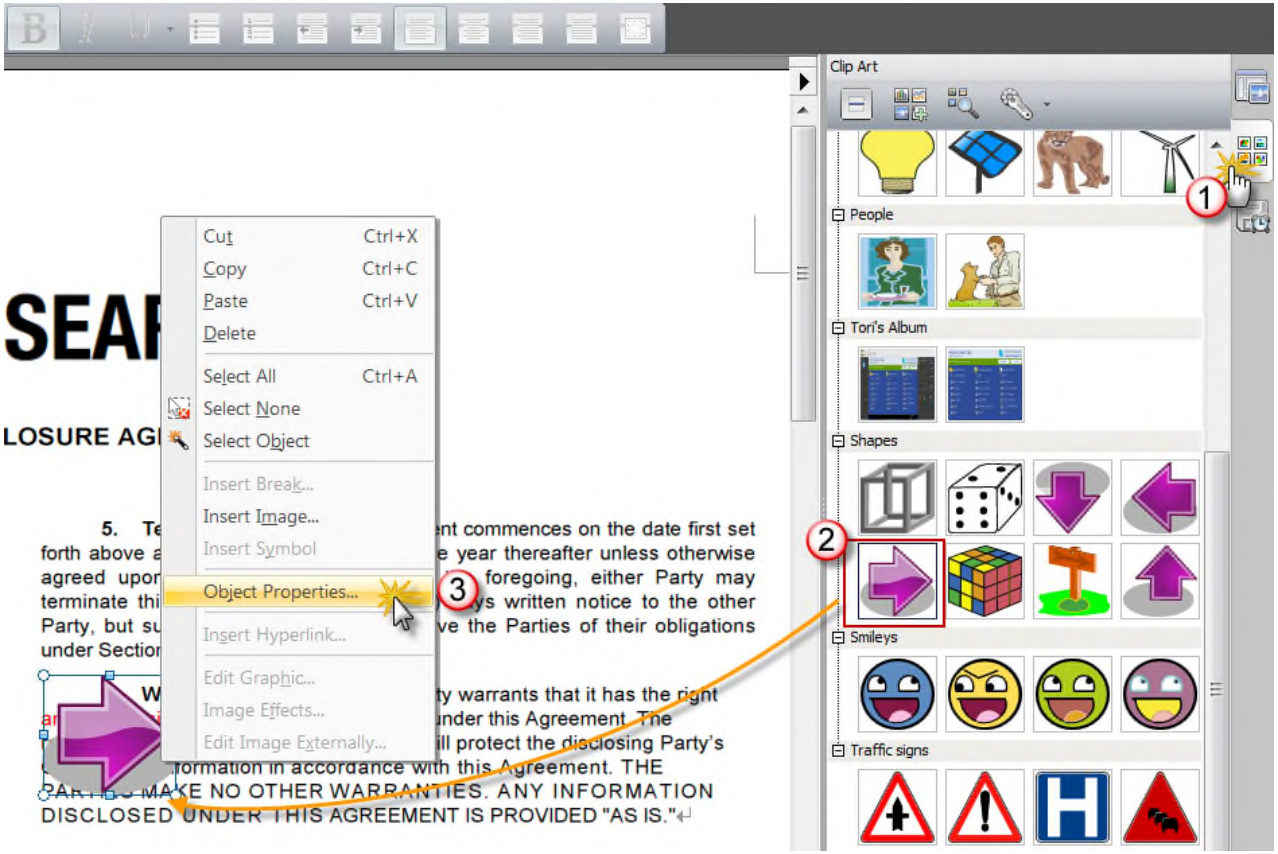
Demo 10 – Advanced Editing (Step 2)



4. To begin editing this PDF document, go to the Section 6 paragraph and place your cursor after the word "right" and begin typing to add the text "and responsibility". Note that the text properly wraps to the next line of text and keeps the proper column formatting of the document.

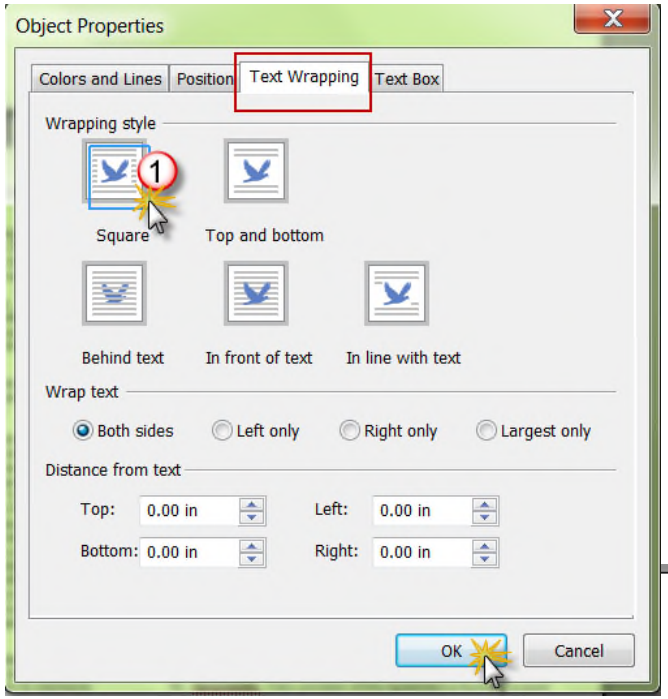
Demo 10 – Advanced Editing (Step 3)

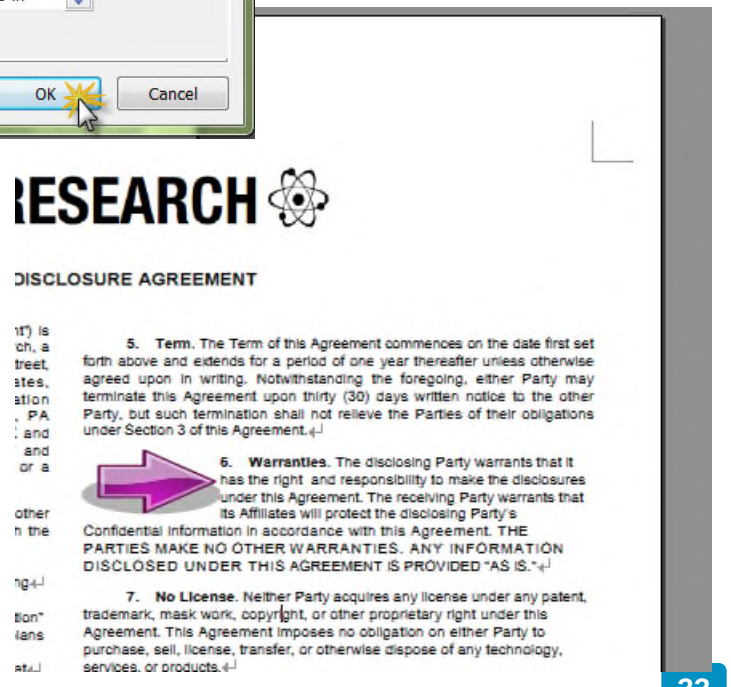
5. To insert a graphic element, click on the “Clip Art” option in the far right panel (1)
6. Click and drag the “Purple arrow” (2) image into the PDF. Position and resize as needed.
7. Right click on the image and select “Object Properties” (3)



Demo 10 – Advanced Editing (Step 4)

8. Under the “Text Wrapping” tab, select “Square” (1) for the Wrapping style
9. Click on “OK”
10. Things to observe in this demonstration:
    - The image wraps properly around the text no matter where you place it within the PDF file




RESEARCH

DISCLOSURE AGREEMENT

5. **Term.** The Term of this Agreement commences on the date first set forth above and extends for a period of one year thereafter unless otherwise agreed upon in writing. Notwithstanding the foregoing, either Party may terminate this Agreement upon thirty (30) days written notice to the other Party, but such termination shall not relieve the Parties of their obligations under Section 3 of this Agreement.

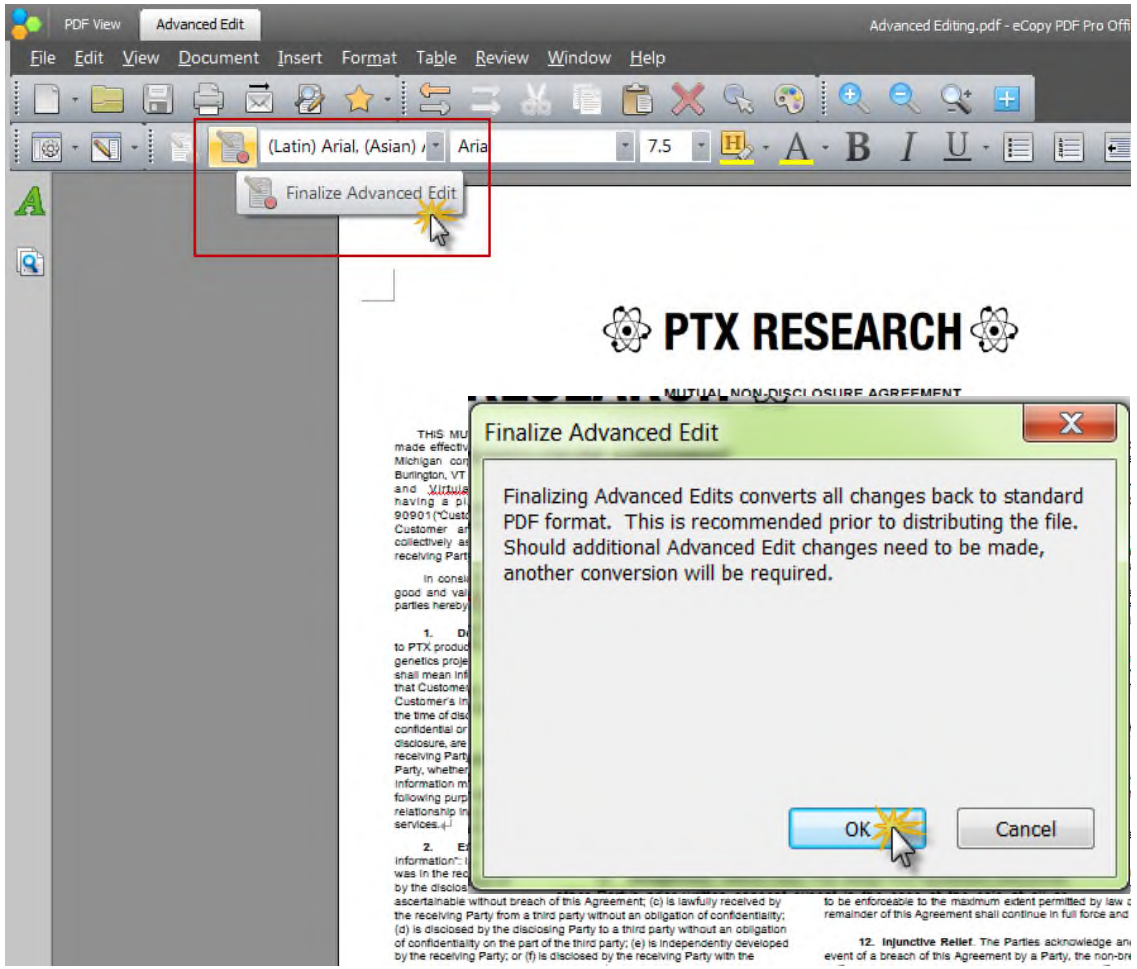
6. **Warranties.** The disclosing Party warrants that it has the right and responsibility to make the disclosures under this Agreement. The receiving Party warrants that its Affiliates will protect the disclosing Party's Confidential Information in accordance with this Agreement. THE PARTIES MAKE NO OTHER WARRANTIES. ANY INFORMATION DISCLOSED UNDER THIS AGREEMENT IS PROVIDED "AS IS."

7. **No License.** Neither Party acquires any license under any patent, trademark, mask work, copyright, or other proprietary right under this Agreement. This Agreement imposes no obligation on either Party to purchase, sell, license, transfer, or otherwise dispose of any technology, services, or products.

Demo 10 – Advanced Editing (Step 5)

11. When advanced edits are complete, you are advised to click on the “Finalize Advanced Edits” button in the Format toolbar, because this makes the changes permanent and removes the no longer needed flowing layout metadata from the document. This is desirable before the document is made available to others.

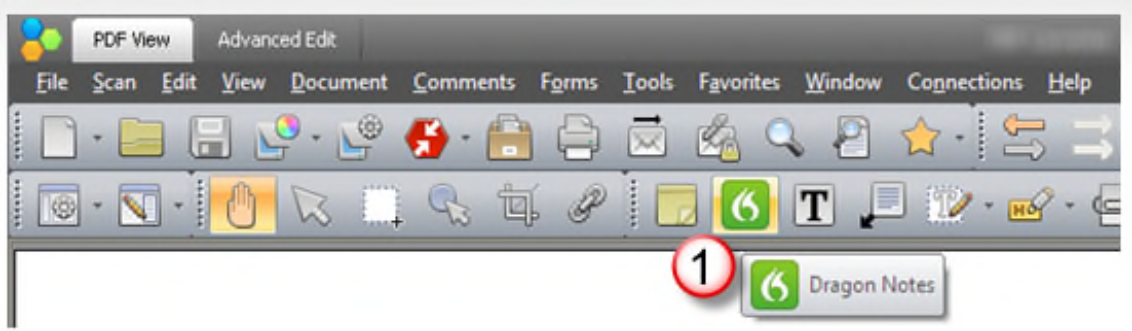
12. In the “Finalize Advanced Edit” dialog box, select “OK”

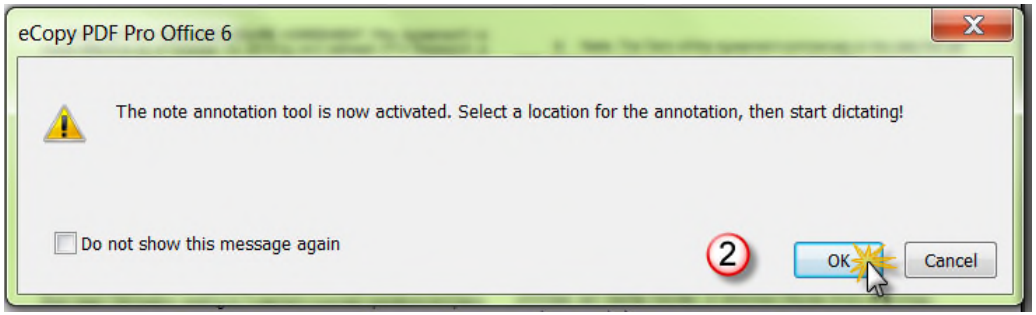


Demo 11 – Dragon Notes (Step 1)

Dictating notes - Notes can be added by dictation using **Nuance Dragon Notes**, if your computer is enabled for sound and you have an internet connection. Use your microphone to transmit dictation to the Dragon Notes server in the Cloud and receive back the written note into your PDF file. No setup or registration is required.

1. Open the file in the "**Dragon Notes**" folder into eCopy PDF Pro Office
2. Click the *Dragon Notes* (1) button in the Comments toolbar and follow the invitation to place an annotation.
3. In the dialog box, click "OK" (2) and use your mouse to draw a box in the PDF for your dictation

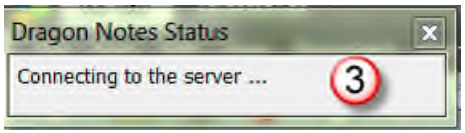


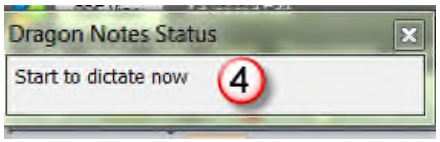


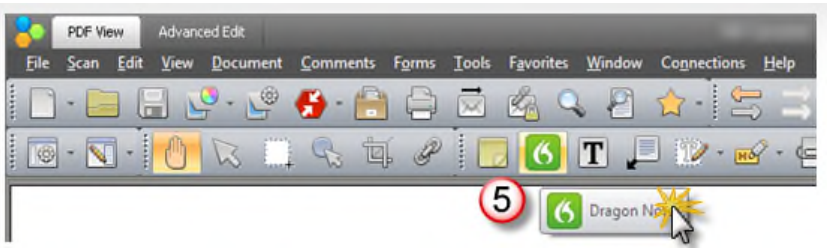
NOTE: An internet connection is required to use this feature

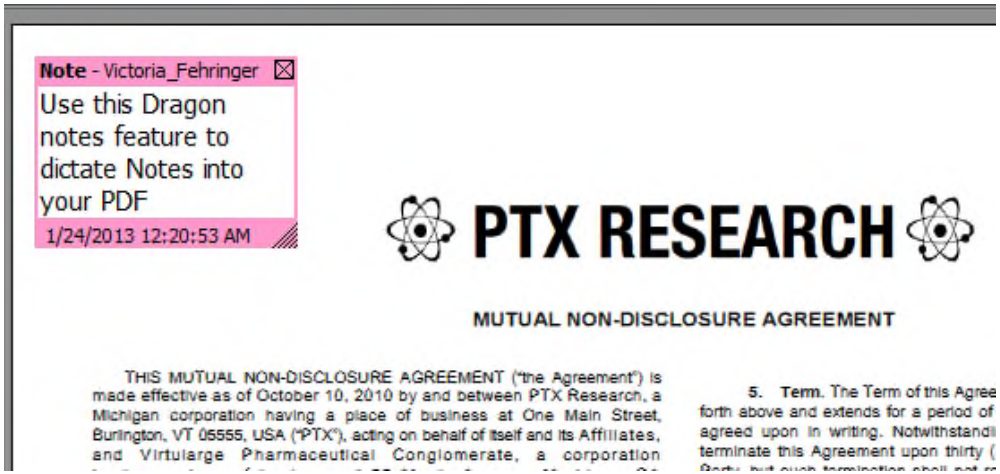
Demo 11 – Dragon Notes (Step 2)

4. The Dragon Notes Status box will appear (3) and will connect providing a message box that tells you to “Start to dictate now” (4)
5. Speak your notes
6. When finished, click the (5) Dragon Notes button again to signal the end of the note
7. Things to observe in this demonstration:
   - The Note Box is filled with the text based on your dictation.







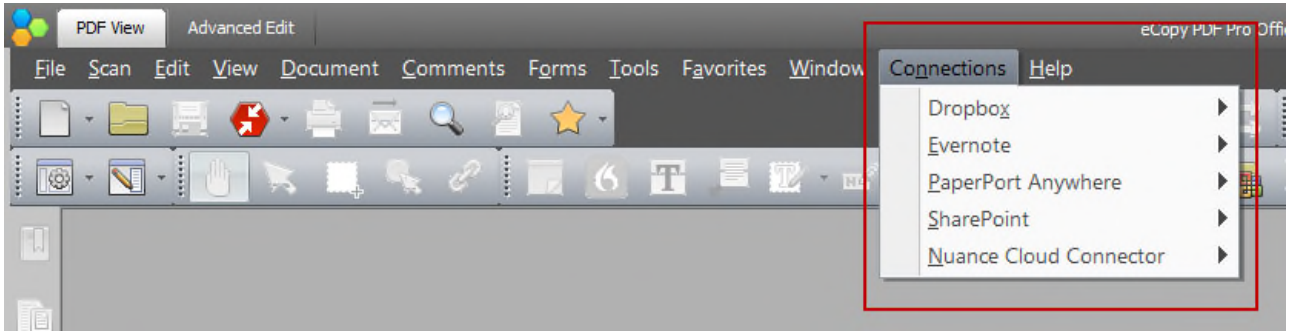


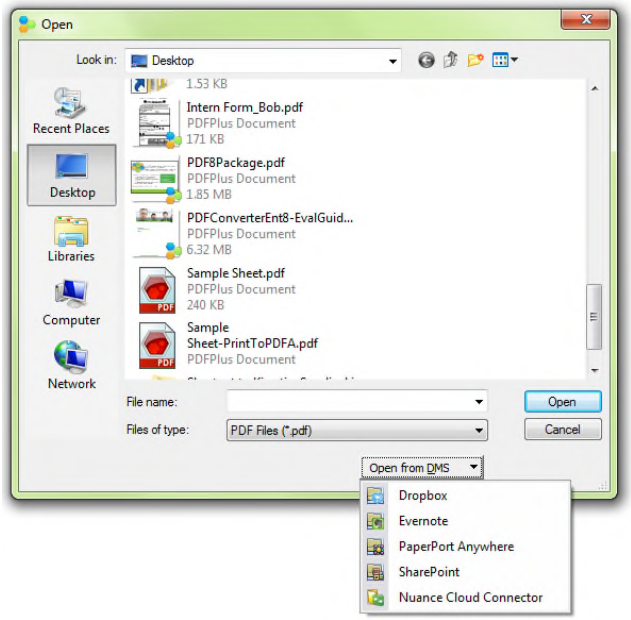
Demo 12 – Connecting to the Cloud

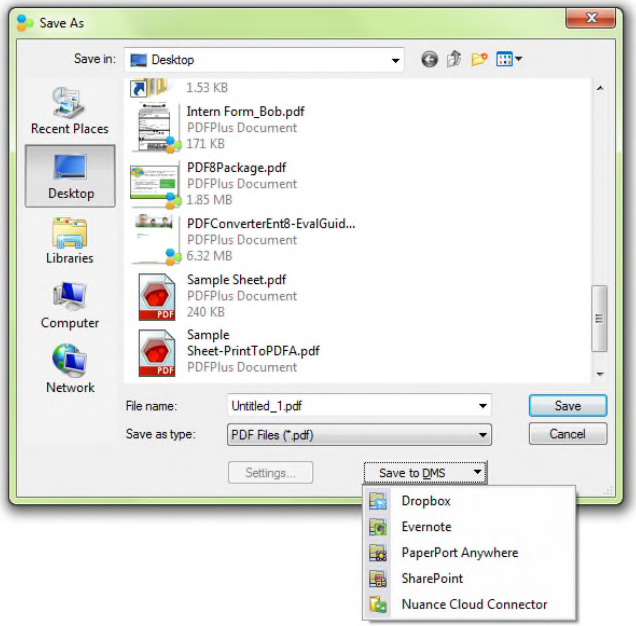
"Open" or "Save" your documents from eCopy PDF Pro Office from many new popular cloud services directly from your toolbar and provides the convenience - the ability to access documents anytime, anywhere

1. From eCopy PDF Pro Office, open the document in the "Nuance Connector Integration" folder.
2. In the menu bar, under "Connections" select the cloud service you wish to access.
3. Follow the prompts and enter in your cloud account information and password.
4. You can also access your cloud connections directly from the "Open" and "Save As" menus. This will streamline your access to documents stored in the cloud.

NOTE: An internet connection is required to use this feature







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