

eCopy

28-Oct-05

Getting Documents Into eCopy

Scanning

At the Canon Scanner/Copier/Printer:

- Enter a client/matter number into Equitrac to activate the Canon touchscreen
- Press the **hold** key on the Equitrac keypad to hold your number while you scan
- On the Canon touchscreen press **Scan**
- Press **Online**
- Load your document for scanning into the document feeder or place the first page on the glass
- On the eCopy ShareScan screen press **Scan to Desktop**
- Your document will be scanned
- Each page of the scan job will appear one at a time on the eCopy ShareScan screen
- Wait for the last page to appear on the screen
- If you have additional pages to scan:
 - Load the next page or set by placing on the glass or loading into the document feeder
 - Press **Scan More** on the eCopy ShareScan screen
 - Repeat until all pages of your document have been scanned
- Press **Send to Desktop** on the screen
- Enter a short file name on the screen to identify your scanned document. *Note:* The name you choose will be the name of the attachment if you use eCopy to email this document to someone.
- Press **OK**
- Enter the first letters of your first name until your name is filled in the TO: field
- Press **OK**
- After sending the document to your desktop the eCopy Share Scan screen will revert to the main menu (Scan to Desktop)
- If you have more than one document to scan you can now load the next document and repeat the steps above to scan it
- **Very important final steps:**
 - When you are done scanning select **Offline** on the Canon touchscreen
 - Press **Copy** on the touchscreen to return to the default Copy screen (so it's ready for the next user)
 - Press **End** on the Equitrac keypad

Opening Your Scan Job(s) at Your Desktop

- Return to your PC
- You may see a notification in your system tray that says you have a scan job waiting in your Inbox. If you see that notification you can click it to open the eCopy Desktop software and bring up your Scan Inbox
- If you do not see a notification in your system tray you can open it manually:
 - Double click the eCopy Desktop icon on your desktop
 - To open the Scan Inbox folder click Scan on the toolbar
- Within the Scan Inbox you will see a list of documents you have scanned with the names you entered. When you click on each one you will see a preview of the scanned document
- To open a document in eCopy, select it and click Open.
- It is important to note that once you have opened a scanned document in the eCopy Desktop software if you close the document without mailing it or saving it you will have to rescan it if you want to mail or save it later. Opening a document and closing it without saving will result in the document being removed from your Scan Inbox.

Converting Existing Electronic Documents into PDF Format (similar to PDF Factory software)

Any document that can be printed can be converted to a PDF using the eCopy print driver. There are multiple reasons you might want to do this. Here are just a few:

- You need to electronically file some documents. The courts require you to convert the document to PDF before uploading to the court.
- You want to email a Word document to someone outside the firm, but you don't want the other party to easily be able to edit the document or view the metadata of the document. You can convert the document to PDF format first and then email it.
- You found a good article on the web which you will want to reference later. You can convert the document to PDF format and save it to DocsOpen where you can retrieve it when you need it.

Converting a document to PDF is easy. Here are the steps:

- With the document or web page open select File, Print.
 - With the installation of eCopy onto your PC you will see two new print drivers added to your printer list:
 - eCopy Desktop Printer BW and
 - eCopy Desktop Printer Color
 - Choose the print driver ending with "BW" for black and white documents and the print driver ending in "Color" for color documents. Keep in mind the reason you are converting the document to PDF. The color print driver is nice because it preserves all the colors on a document. But it also makes a larger file size. If you have a document with some color text but you are converting it for electronic filing purposes where the court has a mandated size limit on files you may choose to use the black and white driver to ensure the file size is under the court's limit.
- Select either the black and white or color print driver.
- Click OK.
- The eCopy Desktop software will open up with your document inside.

- You may now email the document, add markups, or save it. See instructions below.
- Note – after printing to the eCopy Desktop Printer driver you may want to set your printer back to a digital or laserjet printer. Otherwise, the eCopy Desktop Printer driver will be the new default for further printing from the same application. In this respect it works just like PDF Factory.

E-Mailing a Document

- With your document open in eCopy, click the Mail button on the toolbar.
- You will get a Mail dialog box. The default is set so documents will be saved to PDF format before sending.
- Click Send.
- An email message will open with your document attached. This is very similar to the functioning of the HP Digital Sender. You can now edit the Subject and Body of the email message, fill in the To field and send the message.
- Note: If you need to email more than one scanned document you must save the documents first – either to DocsOpen or natively to your Desktop, for example. See the next section for instructions to save documents.

Saving Documents

Saving to DocsOpen

- With your scanned document opened in eCopy Desktop, click the Save button on the toolbar. A DocsOpen profile will appear.
- Fill in the profile as you would any other document.
- Click OK

Saving Natively (e.g., to your PC Desktop)

- Click the Save button on the toolbar. A DocsOpen profile will appear.
- Click Cancel
- At the prompt “Do you want eCopy to save this document?” click Yes.
- The Save As box will come up with the Save In location set to “eCopy Desktop.” You will want to click down the arrow next to the location and scroll to the top of the list to choose Desktop as the location.
- Type a short file name.
- The Save as Type field is set to “eCopy Files (*.cpy)”. It is recommended that you click the down arrow next to the Save as Type field and select “PDF Files (*.pdf)”.
- If you have added markups to your document you may want to click the box to select “Make Blackout/Whiteout Markups Permanent.” If you do not choose to make the markups permanent it is possible that someone else will be able to edit or remove the markups.

Opening Documents

Opening eCopy Documents from DocsOpen

- Open the eCopy Desktop software, click the Open button on the toolbar, select your document and click OK.
- – OR –
- Open DocsOpen, Select the document from Recent Edits or Search for it and click Open.
- **DO NOT** – try to open an eCopy document from within Word. Your DocsOpen will crash.

Opening eCopy Documents saved Natively

- If you saved the document to PDF format per these instructions, you can double click on the file to open it in Acrobat Reader. That will allow you to view the file and print it, but not make changes.
- If you want to open it in eCopy because you want to add markups to it you must follow these steps:
 - Open the eCopy Desktop software.
 - Import the PDF file:
 - Select File, Import from the menu
 - Change the Files of Type field to Canon PDF Files (*.pdf)
 - Click Desktop on the task bar at the left to find a file on your Desktop. Otherwise, browse to and select the file you want to open.
 - Click Open

Saving a DocsOpen Document Natively or Vice Versa

If your document is already saved in DocsOpen and you want to save it natively to your Desktop:

- Open the document and select File, Save As from the menu. A DocsOpen profile will appear.
- Click Cancel.
- At the prompt “Do you want eCopy to save this document?” click Yes.
- The Save As box will come up with the Save In location set to “eCopy Desktop.” You will want to click down the arrow next to the location and scroll to the top of the list to choose Desktop as the location.
- Type a short file name.
- The Save as Type field is set to “eCopy Files (*.cpy)”. It is recommended that you click the down arrow next to the Save as Type field and select “PDF Files (*.pdf)”.
- If you have added markups to your document you may want to click the box to select “Make Blackout/Whiteout Markups Permanent.” If you do not choose to make the markups permanent it is possible that someone else will be able to edit or remove the markups.

If your document is already saved natively in eCopy and you want to save it to DocsOpen:


- This procedure only works on PDF documents which were created using the Canon scanner or one of the the eCopy print drivers.
- Open the eCopy Desktop software.
- Import the PDF file:
 - Select File, Import from the menu
 - Change the Files of Type field to Canon PDF Files (*.pdf)
 - Click Desktop on the task bar at the left to find a file on your Desktop. Otherwise, browse to and select the file you want to open.
 - Click Open
- Click Save and fill out the DocsOpen profile.

Adding Markups to Your Document in eCopy Desktop



- Click the Markups button on the eCopy Desktop toolbar. The markup toolbar will become visible. You can move it around your screen by dragging the blue title bar. When you are finished with it you can click the X to close it.




Black out and White out

- You can use the black out and white out buttons to hide a region of the page.
- Click the Black Out or White Out tool: 
- Drag the mouse across the region you want to hide.


Highlighting

- Click the Highlight tool: 
- Pick a color: 
- Drag the mouse across the region you want to highlight.


Draw a Straight or Curved Line

- Click the Curved Line or Straight Line tool: 
- Pick a color, width and style.
- Drag the mouse to draw.

Add Text or Fill in a Form

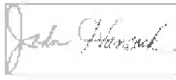
- Click the Text tool: 
- Click the cursor where you want to type.
- Select the font, size, and color.
- Type the text.

Add a “Rubber Stamp” Graphic to Your Document

- Click the Rubber Stamp tool: 
- Choose a library of stamps from the dropdown arrow at the bottom of the dialog box.
- Click on the stamp you want to use.
- Click Stamp.
- Click the spot on your document where you want the stamp.
- Note – if you want make the stamp larger or smaller you can resize it after selecting it. See instructions below.


Creating a Signature Stamp

- Write your signature on a piece of paper and scan it into eCopy Desktop.
- Use the mouse to drag a box around your signature.



- Release the mouse and click Create Stamp.
- Click the down arrow at the bottom of the dialog box to choose:
C:\My Documents\eCopy Stamps\Signate.glb (it's the Signatures library).
- Click Add.

Resizing, Deleting, Moving or Editing a Markup Object

- To edit, move or delete a markup object you must first select it.
- Click the Select tool: 
- Click on the object you want to affect. A selected object will be surrounded by gray arrows and a hashmark border like this:



- With the object selected you have several options:
 - Press Delete on your keyboard to delete the object.
 - Use your mouse to drag the object to a new location.
 - Grab one of the corners and drag to resize the object.
 - If it's a line or text you can use buttons on the Markup toolbar to change font and font size or line width.

OCR a Document

- eCopy Desktop's built-in OCR capability lets you convert an eCopy document into text that you can edit using Word. Note – this is a basic OCR program which is good for short, simple OCR jobs. If you have a large or complex document to scan and OCR (such as that set of interrogatories that need to be answered) it is a good idea to turn those projects in to Word Processing where they have more sophisticated OCR software available.

OCR an Entire Document or Entire Pages of a Document

- Open the document in eCopy Desktop.
- Click the OCR button on the toolbar.
- The default document format is Rich Text Format and it's set to open in Word.
- The default is to OCR All Pages of the document, or you can choose to OCR only the current page or selected pages.
- Click OK.
- Word will open with the dialog box telling you it is in Rich Text format. Click OK.
- The OCR'd document will open up.
- Note that the new document before you contains a bunch of non-KTC styles. Please do not save this version of the document.
- Instead, create a KTC shell for the document by using HotDocs, copying an existing document which was created using the correct template, or click New if it is a generic document.
- Once you have the new shell created, switch back to the OCR'd document. Select the text of the document (Ctrl+A or triple click in the selection bar). Copy the text. Switch to the shell document. From the menu select Edit, Paste Special. Select Unformatted Text.
- Next, you must clean up the document. Rarely does OCR software read the document as well as you would have. Please read through all the text to make sure it is correct. If you don't have time to do proper cleanup, this is a project you may want to turn in to Word Processing rather than attempting yourself.

OCR a Block of Text

- Open the document in eCopy Desktop.
- Drag a box around the block and click OCR to Clipboard.
- Switch to Word and place your cursor where you want to insert the text.
- Paste.
- Note – sometimes you may want to OCR a block of text which fills more than one screen. For example, a page of a pleading. If you can't see the entire block of text you want to block in the normal Fit Width view, try the Fit Length view. Although you can't read the text very well with your eyes, eCopy can still read it for OCR purposes.

Moving Pages / Combining Documents

- Click the View All button on the toolbar to see all pages of a document in one window (multi-page view).
- Multi-page view supports drag and drop. You can move or copy pages within a document or between documents.
- Dragging within a document **moves** the page. Hold down the Ctrl key while dragging to copy.

- If you want to combine pages from multiple documents, first open each document in eCopy. From the menu select **Window, Tile Vertically** or **Tile Horizontally**. Set each window to multi-page view by selecting the window then clicking **View All**. You can now drag pages from one document to another.
- Dragging to another document copies the page (hold down the Shift key to move).
- To copy several pages at once, hold down the Ctrl key and click on each page before dragging. Hold the Shift key to move them.
- To delete a page, select the page and press the Delete key.
- Click **View All** again to go back to a single page view.

Special Topics

Scanning in Color

- The Canon scanner located at 28 Central, 28 North and 29 Central are black and white scanners only. The Canon scanner located at 29 North will scan in color. If you need to scan a document and have the resulting PDF show the colors, you should use the scanner at 29 North. The procedures for scanning in color are the same as those for scanning in black and white.

Creating Searchable Text

- When you save or email a document you may see a checkbox or message about **Creating Searchable Text**. eCopy Desktop's OCR engine can embed a text version of the scanned image in the PDF file header. This permits full-text searching from within Acrobat Reader.

Make Blackout/Whiteout Markups Permanent

- When saving or emailing a document you may see a checkbox for **"Make Blackout/Whiteout Markups Permanent"**.
- Hiding information using eCopy Desktop's blackout or whiteout tools does not affect the original document, but only adds elements to the markup layer.
- If you use these tools to hide confidential information, you will want to make these markups permanent before saving or emailing the file.
- By default markups are made permanent when you email a file. However, the markups will not be permanent on a document you save to DocsOpen unless you mail it from eCopy.

File Formats

- eCopy Desktop uses a proprietary file format with a **".cpy"** file extension at the end of the file name. We have changed the defaults of the software to save and email documents in PDF format instead. If you email a file in straight eCopy format with the .cpy extension on the file name the person on the other end will not be able to open the file unless they have eCopy Desktop software or a special viewer. As long as you use these instructions for saving and emailing your documents, they should go in PDF format which most people can open without difficulty.