



Easy to use interface  
Multiple Organizer and Binder Projects  
Advanced document management integration  
Dual integration with MS SharePoint and a DMS  
Cost-effective PDF management solution  
Enhanced business processes and workflow

# pdfDocs Desktop 3.1



Businesses have long recognized the importance of the Portable Document Format (PDF) when distributing documents via email or for document management. The problem has been that too many PDF solutions are expensive, making it impossible to put the power of PDF on every desktop.

## BUILT FOR LAW FIRMS

pdfDocs Desktop is a cost-effective enterprise-wide solution that is designed around law firm work process. Users become more efficient with routine procedures and find it easy to complete advanced tasks related to electronic filing, content binding, publishing and much more.

pdfDocs Desktop integrates into the legal desktop, workflows and systems to help manage business-critical content.

## MATTER CENTRIC CONTENT MANAGEMENT

pdfDocs lets you assemble and collate documents from different applications and systems into a collection of PDF documents that can be organized by Matter, Project or Issue. You can edit, redact, annotate and secure the content as well as apply stationery, watermarks or numbering sets across all the documents stored in the matter folder.

You can set up multiple matter folders within pdfDocs Desktop. Import all the content related to a specific matter, or project into the appropriate Matter folder. Each folder can be configured with individual output settings.

## CONTENT PUBLISHING

pdfDocs Binder is an ideal way to publish content to CD, your document management system or MS SharePoint. pdfDocs Binder makes content publishing easy and efficient. Entire folder structures can be imported and converted into a single or multi-PDF document, automatically generating a table of contents, cross-document hyperlinks and bookmarks. You can apply headers and footers across the Binder Project in a single click.

Individual practice areas can create templates and cover pages to minimize workload and to create a consistent look and feel.

## EXTEND YOUR DMS

pdfDocs Desktop integrates with Autonomy iManage WorkSite, Open Text eDOCS, NetDocuments, TRIM and Worldox, enabling users to convert external documents to PDF and to profile them into the DMS. Users can convert existing documents in the DMS environment to PDF as new or related documents.

## MS SHAREPOINT INTEGRATION

pdfDocs Desktop 3.1 allows users to Save into and export documents and libraries from MS SharePoint. pdfDocs Desktop 3.1 provides dual integration with MS SharePoint and a DMS.

## REDUCE BUSINESS RISK AND EXPOSURE

Sharing documents online can be risky. Print your business documents to pdfDocs Desktop to remove the metadata and to prevent document tampering.

*"I highly recommend this product to any law firm that wants efficient software to organize its PDF documents — this is the best I have seen to date."*

Legal Assistant  
Today: Milton  
Hooper, litigation  
support specialist

*"All in all, pdfDocs Desktop can serve as an adequate substitute for Acrobat Professional (and a lot less expensively). The pdfDocs OCR Server is also worth a serious look."*

TechnoLawyer: John  
Heckman, legal technology  
consultant

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|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CREATE PDF</b>               | <p>Create PDF documents from any application</p> <p>Single-click conversion to create PDF from MS Word, MS Excel, MS PowerPoint</p> <p>Use Watchfolders to automatically convert image files to PDF</p> <p>Combine pages or documents and output as a single PDF, TIFF or JPEG</p> <p>Generate PDF documents that meet PDF/A requirements</p> <p>Cleanse PDF documents of metadata</p> <p>Compress PDF document to produce a smaller-sized PDF</p> |
| <b>MATTER CENTRIC ORGANIZER</b> | <p>Create multiple Organizer projects based upon Client or Matter</p> <p>Create Organizer templates, complete with settings</p> <p>Save the Matter/Project to a shared location for others to work on</p>                                                                                                                                                                                                                                          |
| <b>MATTER CENTRIC BINDER</b>    | <p>Collate PDFs and non-PDFs into a Binder</p> <p>Generate table of contents, bookmarks and links automatically</p> <p>Select documents within the Binder as cover pages</p> <p>Edit non-PDF documents in their native applications</p> <p>Create Binder templates</p> <p>Import folders from DMS or MS SharePoint maintaining structure</p> <p>Check documents in the Binder or any updated versions in the DMS</p>                               |
| <b>APPLY NUMBERING SETS</b>     | <p>Create, edit, copy and save Numbering sets</p> <p>Add Bates Numbering to a single or multi-document collection</p> <p>Track last used Bates number automatically</p> <p>Create Numbering sets with DMS Doc ID, author and version number info</p>                                                                                                                                                                                               |
| <b>CREATE FORMS</b>             | <p>Add form fields to PDF forms to capture information</p> <p>Set the tabbing order in which data is entered into the form fields</p> <p>Align and resize form fields on a page</p>                                                                                                                                                                                                                                                                |
| <b>DMS INTEGRATION</b>          | <p>Create PDFs in Autonomy iManage WorkSite, NetDocuments, OpenText, TRIM and Worldox</p> <p>Save page, document or collated documents into DMS as PDF</p> <p>Save the current MS Word document into DMS as PDF</p> <p>Dual integration with Microsoft SharePoint and a DMS</p>                                                                                                                                                                    |
| <b>SPLIT DOCUMENTS</b>          | <p>Split PDFs by size or number of pages for eFiling or email compliance</p>                                                                                                                                                                                                                                                                                                                                                                       |
| <b>OUTLOOK INTEGRATION</b>      | <p>Email documents directly from MS Word as PDF attachments</p> <p>Convert some or all email attachments to PDF before sending</p> <p>Email multiple documents as single or as multiple attachments</p>                                                                                                                                                                                                                                            |
| <b>OFFICE INTEGRATION</b>       | <p>Print all worksheets to PDF from MS Excel</p> <p>Print MS Word document with markups</p>                                                                                                                                                                                                                                                                                                                                                        |
| <b>REDACTION</b>                | <p>Redact an image or an area of a document</p> <p>Search and redact multiple instances of the same text or string</p> <p>Specify page(s) to be redacted</p> <p>Insert codes such as FOI into the redaction</p>                                                                                                                                                                                                                                    |
| <b>SECURE DOCUMENTS</b>         | <p>Prevent readers from changing or copying document content</p> <p>Password-protect a document and apply digital signatures to PDF</p>                                                                                                                                                                                                                                                                                                            |
| <b>ANNOTATE AND MARKUP</b>      | <p>Add free form text, sticky notes and business stamps on the PDF</p> <p>Add comments and highlights to the PDF document</p>                                                                                                                                                                                                                                                                                                                      |
| <b>ENHANCE</b>                  | <p>Add bookmarks, watermarks and stationery to the final document</p>                                                                                                                                                                                                                                                                                                                                                                              |



#### SYSTEM REQUIREMENTS OPERATING SYSTEMS

Windows XP Professional workstation (SP1 or above)  
 Windows 2003 Terminal Server/Citrix  
 Supports XP Fast user switching and multiple user sessions.  
 Supports installation via Active Directory or other network rollout products  
 Windows Vista  
 MS .NET Framework 3.5

MS OFFICE  
 Supports Microsoft Office 2007



SYDNEY  
 MELBOURNE  
 NEW YORK  
 LONDON  
 HONG KONG  
 PORTLAND

info@docscorp.com  
 www.docscorp.com