



# 1 How to Convert SCM Document(s) into PDF

**Please Note:** This help sheet is a general guide based on converting several SCM Documents into one PDF.

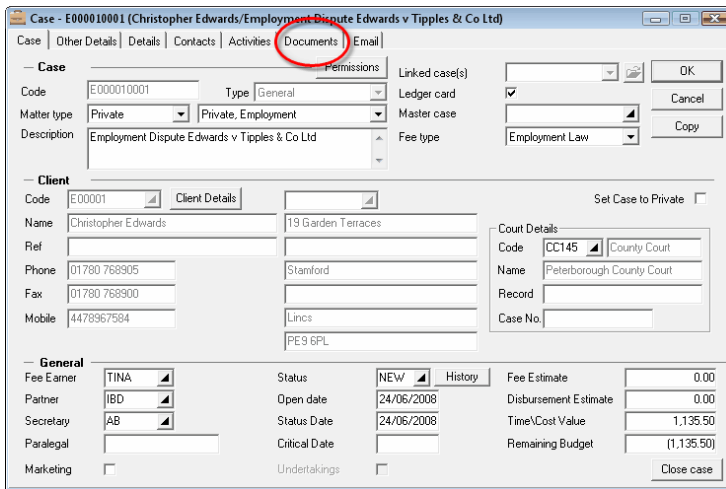
## Why would you want to create a PDF

PDF (*Portable Document Format*) is the most suitable electronic file format for exchanging documents with other people.

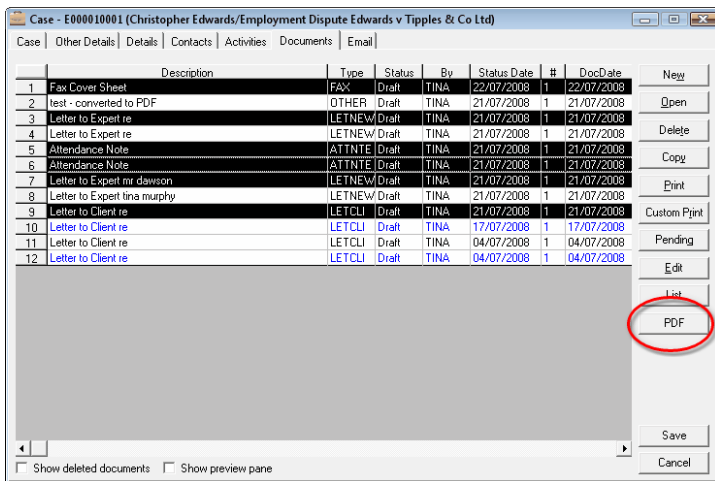
If a client or contact doesn't have Microsoft Word or Word Compatible Viewer they will not be able to open your documents. Adobe Reader is free to download from the official Adobe website <http://www.adobe.com/uk/>.

## Producing a PDF from multiple SCM Documents

1. Log into **Solicitor Case Manager** and open the relevant **Case**.
2. Click the **Documents** tab.



3. Using your mouse select the relevant **Documents** to convert to **PDF**.



### TIP:

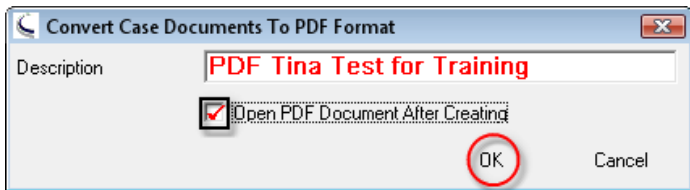
To select multiple Documents, hold down the **Ctrl** key on the keyboard and click once on each Document keeping the **Ctrl** key held down when you click.

4. After selecting the **Documents**, click the **PDF** button on the right hand side of the screen.

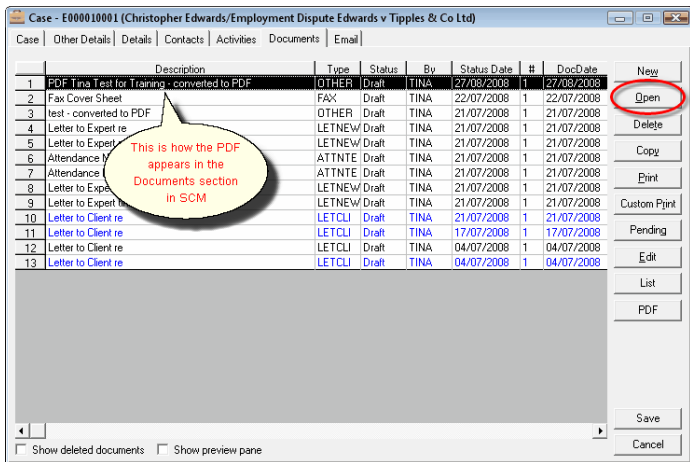
5. The Document order screen will appear, use the  to change the order of your documents.



- 6. Remove the tick if you do not wish to create a table of contents.
- 7. Click **OK** to begin the process. Please wait while the system generates the PDF.
- 8. When the **Convert Case Documents to PDF Format** screen appears, type a filename in the Description box and tick the option to **Open PDF Document After Creating**, if appropriate.



- 9. Click the **OK** button.
- 10. Please wait while the system generates the PDF, the PDF will open automatically if you ticked **Open PDF Document After Creating**.
- 11. If you didn't request the PDF to open it will be listed in the **Documents** tab of your Case.
- 12. Select and click **Open** to view the PDF.



**Are there any file formats that can't be converted?**

- You can convert documents with the following file types:  
 .doc(merged only) .jpeg .wmf .bmp .rtf .html  
 .txt .jpg .emf .peg .jpe .htm



Further assistance can be obtained through the OPSIS Support Desk between 8.30am and 6.00pm on 0844 8155752 or [support@opsisltd.com](mailto:support@opsisltd.com)