ScanSoft®
Productivity
Without **Boundaries**™

PaperPort®11
Getting Started Guide

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IMPORTANT NOTICE

TRADEMARKS AND CREDITS

C o n t e n t s

Welcome to PaperPort

Welcome to the ScanSoft® PaperPort® *Getting Started Guide*.

PaperPort provides the easiest way to turn paper into organized digital documents that everybody in an office can quickly find and use. PaperPort works with scanners, multifunction printers, and networked digital copiers to turn paper documents into digital documents. It then helps you to manage them along with all other electronic documents in one convenient and easy-to-use filing system.

PaperPort's large, clear item thumbnails allow you to visually organize, retrieve and use your scanned documents, including Word files, spreadsheets, PDF files and even digital photos. PaperPort's Scanner Enhancement Technology tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

Installing and Activating PaperPort

You can install PaperPort from a CD or from the Web.

The PaperPort installation program provides easy step-by-step instructions. Follow the instructions on each screen to install the software.

Installation and un-installation require Administrator rights; for Activation and Deactivation you need web access. You will be invited to activate the product at the end of installation. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted.

If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PaperPort 11.0 can be launched only five times without activation.

Registration

Registration enables you to take full advantage of Nuance® product support and to receive notifications of product updates.

When you finish installing PaperPort, you are prompted to register online. If you want to update your registration information, you can always go to the Nuance web site at **http://www.nuance.com**.

Learning PaperPort

This guide introduces you to PaperPort and shows you how PaperPort can help you manage your information. Additional sources of information to help you learn how to use PaperPort include online Help, Release Notes, and the Nuance web site.

Using this Guide

This guide is written with the assumption that you know how to work in the Microsoft® Windows® environment. Please refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.

Using online Help

The PaperPort online Help includes comprehensive information on features, settings, and procedures. Help is available from the PaperPort Help menu.

Additional technical support, including technical notes, frequently asked questions, software updates, and more is available from the PaperPort Help menu.

Using release notes

PaperPort Release Notes provide important information about this release of the program. This document is included on the installation CD, from the PaperPort Help menu, and as a sample document on the PaperPort desktop.

Technical Support

Nuance offers both complimentary and fee-based technical support options designed to meet your individual needs. Our services offer person-to-person telephone and e-mail technical support. We also offer self-service, 24-hour access to our Knowledge Base.

Visit **http://www.nuance.com** for information about your support policy, local support contacts, and product updates. Before contacting Nuance, be sure to read the user documentation and review the Release Notes.

Minimum System Requirements

A computer with an Intel® Pentium® or higher processor

Microsoft Windows 2000 SP4 or above, Windows XP SP2 or above

Microsoft Internet Explorer 5.5 or above

128MB of memory (RAM), 256MB recommended

200MB of free hard disk space for application files plus 5MB working space during installation

SVGA monitor with 256 colors, but preferably 16-bit color (called High Color in Windows 2000 and Medium Color in XP) and 800 x 600 pixel resolution

Windows-compatible pointing device

CD-ROM drive for installation

Web connection (with IE 5.5 or above) for activation and web update

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Performance and speed will be enhanced if your computer's processor, memory, and available disk space exceed minimum requirements. This is especially true when handling very large color image and PDF files.

What's new in PaperPort 11?

PaperPort 11 includes a number of valuable new features to help you manage your documents.

Unprecedented Performance

Faster launch, quick folder navigation, bigger folder capacity and faster item display both on the PaperPort Desktop and in Page Viewer.

Improved OCR Accuracy

PaperPort 11 provides more accurate conversion to text on scanned and PDF documents including lower resolution images.

How-to-Guides

On first startup the program will offer you a series of illustrated mini-guides showing typical tasks and processes, providing quick access to program areas and relevant Help sections. Once disabled, How-to-Guides can be switched on again in the Help menu.

Improved Scanner Selection

Select the scanner you want to use easily in the Scan pane without the need to run the Scanner Setup Wizard separately.

Scanning directly from scanner buttons

Use your device buttons to scan directly into PaperPort. Assign PaperPort events to scanner buttons to get this functionality. See the Scan Documents section in the How-to-Guides for details.

Scan profiles

With PaperPort scan profiles, you can scan different types of documents and images more easily. The profiles are optimized for the most common tasks: scanning in black-and-white, grayscale, scanning color documents, or color photos.

Capture Assistant

Have more precise control over multi-page scanning with the integrated Capture Assistant. The widest range of options are provided in PaperPort Professional 11.

Folder Notes

If you want to automatically add the same subject, author, or keywords to all PDF and MAX items coming into a specific folder through scanning or DesktopDelivery™, use Folder Notes. Entering keywords and subjects makes it easier to find items later.

Customizable Toolbars

You can now set up your PaperPort workspace more comfortably by repositioning or docking toolbars, and customizing which icons you want to display.

New SET Tools

New SET™ Tools give you more control over image quality: you can set black and white points for auto-enhancement, and erase unwanted handwritten notes or shadows from the edge of your scanned pages.

PaperPort Watson

A new intelligent search utility that unites the best of the PaperPort All-in-One Search™ with other popular search engines including Google® and MSN® Desktop Search utilities.

Closer integration with other Nuance products

• If you have ScanSoft® OmniPage® on your system, PaperPort cooperates with it more closely than ever, providing cutting-edge OCR page recognition services and high-level PDF creation including Searchable PDF files.

• PaperPort Professional 11 comes with integrated PDF Create! enabling you to create smaller text-based PDF files from applications and assemble PDF files quickly and easily from a variety of source documents.

The following advanced features are available only in PaperPort Professional 11:

Unlimited Scan Profiles

You can freely create and configure new Scan Profiles, or remove unwanted ones.

Professional Capture Assistant

Professional Capture Assistant: The Capture Assistant displays thumbnails of pages as they are scanned. After scanning, you can re-order or rotate pages or add blank separator pages. When you are done, you can specify subject, author and keywords for your items.

PDF-MRC High Compression

Now you can create scanned color or grayscale PDF files that are up to 8 times smaller than regular scanned documents.

Searchable PDF

If you have OmniPage together with PaperPort Professional on your system, you can create searchable image PDF files as well. You can index, search and extract the text content of such PDFs.

PaperPort is also supplied in Special Editions to selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Getting to Know PaperPort

This section introduces you to the different parts of PaperPort. Refer to the PaperPort Help for detailed information about all these topics.

PaperPort How-to-Guides

The How-to-Guides display on first program launch. They are a series of mini-guides that help you get started easily by providing concise overviews of key program areas, such as scanning, searching, document assembly and the like.

The PaperPort desktop

The PaperPort desktop appears with the Folders pane when you first start the program. It displays your documents, as well as the tools you can use to manage them. PaperPort offers all the tools necessary to organize, find, and use documents and images.

Command bar with customizable toolbars

Desktop

Access to other pages

Folders

Send To bar
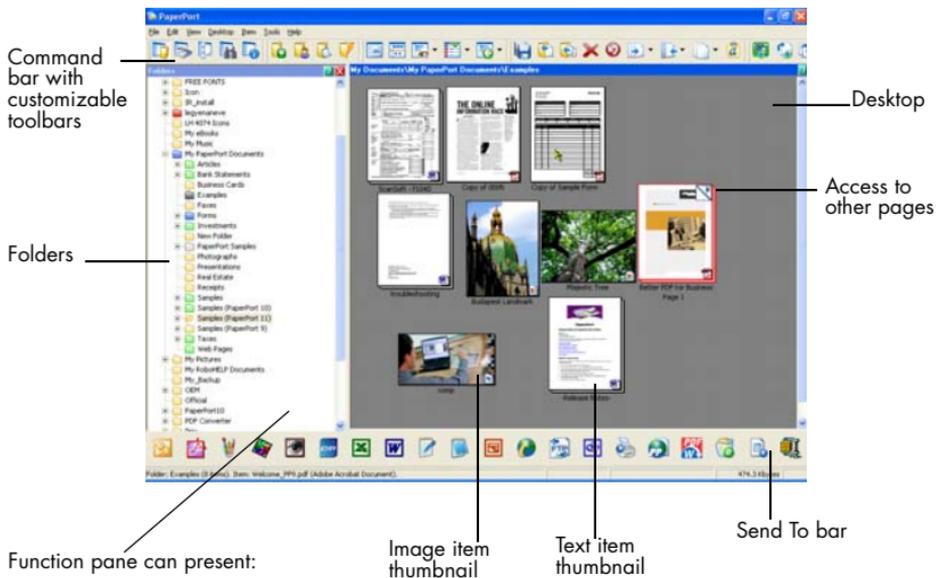
Function pane can present:
- Folders (View menu)
- Page Thumbnails (View menu)
- Item Properties (View menu)
- Scan or Get Photo (File menu)
- All-in-One Search (Tools menu)

Image item thumbnail

Text item thumbnail

PaperPort items

The documents and photographs you acquire in PaperPort are called **items**. There are two types of items: **image items** and **text items**.

Image items are scanned documents, photographs, and other digital items in an image format, such as PDF, JPEG, TIFF, or PaperPort Image (.max).

You create image items from documents, photographs, line art, or other items that you scan, copy, or bring in to the PaperPort desktop.

Text items are documents that contain editable text, such as Word (.doc), HTML, and Excel files, and are created by word processing and other text-based applications.

You can use any flavor of PDF file (PDF Image, PDF Searchable Image, and PDF Formatted Text and Graphics (PDF Normal)) with PaperPort. PaperPort distinguishes between image-only and non-image PDF items. You can use the SET tools to improve the quality of PDF-image only items.

You can quickly send an item to another program without leaving the PaperPort program. Just drag an item onto the link icon in the Send To bar at the bottom of the desktop. PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs.

PaperPort includes a **My PaperPort Documents** folder containing items to demonstrate some of the types of items you can keep on the PaperPort desktop.

You can also use PaperPort to view non-PaperPort items that reside on your computer. Simply copy or move the document file or photo into a PaperPort folder.

The Folders pane
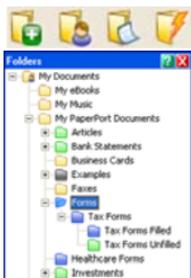
The **Folders** pane presents a hierarchical view of your PaperPort folders, similar to the view you see in Windows Explorer. Use the Folder Tools to access its commands quickly.

PaperPort installs a PaperPort folder named **My PaperPort Documents** into your My Documents folder. If you are using a multi-user system, each user has their own My PaperPort Documents folder.

The My PaperPort Documents folder contains several subfolders whose names – such as Articles, Business Cards, Photographs, and Receipts – illustrate the different ways you can organize your items in PaperPort.

The Samples folder contains sample documents and photographs to help you get started using PaperPort.

When you have acquired your own PaperPort items, you do not have to use the My PaperPort Document folder to store them. You can add other local and network folders to PaperPort's Folder View. You can also delete the My PaperPort Documents folder, but your PaperPort structure must contain at least one folder.

> To show or hide the Folders pane, click the **Folders** button on the Command bar.
> With the desktop split, Folders panes can be displayed for each Workspace.

PaperPort item thumbnails

There are two kinds of thumbnails in PaperPort: item and page thumbnails. Each item thumbnail is a small, graphic representation of your document or photo. Page thumbnails show pages of image items and PDF files in the Page Thumbnails pane both on your PaperPort desktop and in the PageViewer.

One quick way to locate your PaperPort items is to visually browse through the item thumbnails on your PaperPort desktop. Thumbnails show you what's in a document without having to open it. In addition, thumbnails give you the ability to scroll through the pages of the document without opening it.

PaperPort shows large, clear thumbnails of all your documents and photos, including:

- Scanned pages and photos
- Photos from your digital camera
- Image files in formats such as BMP, TIFF, JPEG, GIF, and MAX
- Microsoft Word, PowerPoint®, Excel®, Word Perfect™ , and other documents created in popular software programs
- PDF documents

- PDF Image items
- HTML documents

Each item thumbnail appears with an icon that identifies the program in which it was created or is currently associated. This makes it easy and convenient to quickly see and find all different types of items on your computer.

Click on a thumbnail to see image attributes. A small **R** icon indicates that the Read-only attribute is set for that item. A small **A** icon indicates that the image has annotations. Multi-page image items show **N** to let you scroll through the pages even with the Page Thumbnails pane closed.

Before you can work with an item, you must first select its thumbnail on the PaperPort desktop. A red line appears around an item to indicate that it is selected. While working with item thumbnails, you can:

- Drag a thumbnail to reposition it on the PaperPort desktop.

- Drag a thumbnail to a folder to move the item to that folder.

- Drag a thumbnail to another open Workspace to move the item to that open folder.

- Double-click a thumbnail to view the item.

- Press the **Ctrl** key and double-click a thumbnail to open the item in its source program.

- Right-click a thumbnail to display the item's shortcut menu.

- Drag a thumbnail to the Send To bar to send a copy of the item to another program.

Using item thumbnails on the PaperPort desktop, you can also easily combine individual PaperPort Image items or PDF Image items into multi-page items. This feature is useful as an organizational tool if you are using a scanner that can only scan a page as a separate item.
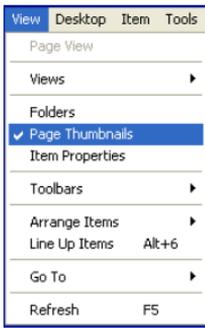
PaperPort page thumbnails

The Page Thumbnails pane on the PaperPort desktop and in PageViewer displays thumbnails for multi-page image items. Select a multi-page item, then click the **Page Thumbnails** button or use the View menu. Page-level operations can be done quickly without having to open the files. The first three items listed below are available for all image files. The remainder are available for PDF files (both on the PaperPort desktop and in PageViewer) and MAX files (desktop only). You can:

- Enlarge or reduce thumbnail size.
- Copy and move selected pages to a Workspace as separate PDF files.
- Copy and move pages between documents open in different panes.
- Copy, paste, cut, delete and reorder pages.
- Insert new pages at a certain location in the document.
- Append new pages at the end.

> The Page Thumbnail view of a secure PDF is only available by supplying its password.

Two-part desktop

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When you first start PaperPort Professional 11, the desktop appears split into two Workspaces – top and bottom. This layout gives you a better oversight necessary to organize and combine your documents more effectively even in a cross-folder fashion. Right-click the active Workspace or use the **Views** button to change the way of viewing. If you work with documents containing multiple pages, you can use the corresponding function pane to view page thumbnails without having to open the given document. You can also use these desktop areas to view your folders, or the properties of the selected item. To remove the desktop split, open the Desktop menu, and uncheck the Split Desktop menu item or click the Split Desktop icon.

You can also bookmark the Workspaces of your choice by using the **Bookmark Workspace** command from the Desktop menu. To manage them, use the **Organize Bookmarks** command. Getting to a frequently used Workspace is just a mouseclick away, since they are all displayed in the same menu.

Function pane showing page thumbnails

Desktop split

Function pane showing folders

Active Workspace

Inactive Workspace

Send To bar
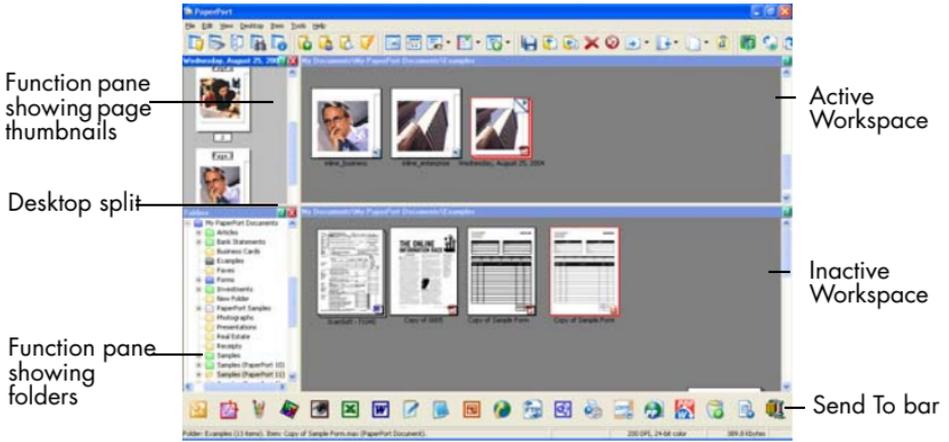
The Page View window

To view an item in the Page View window, double-click an item thumbnail in Desktop view, choose **View** from its shortcut menu or select the item and click the **Page** button on the Command bar.

The Page View window allows you to take a closer look at your items and to touch up and annotate them. You can also enlarge or reduce the view for easy reading. Use the SET tools to enhance the current page image. Use the Page Thumbnails pane to edit your document at page level.

Desktop button: click to return to the PaperPort desktop

Annotation Tools

Page Thumbnails Pane

SET Tools
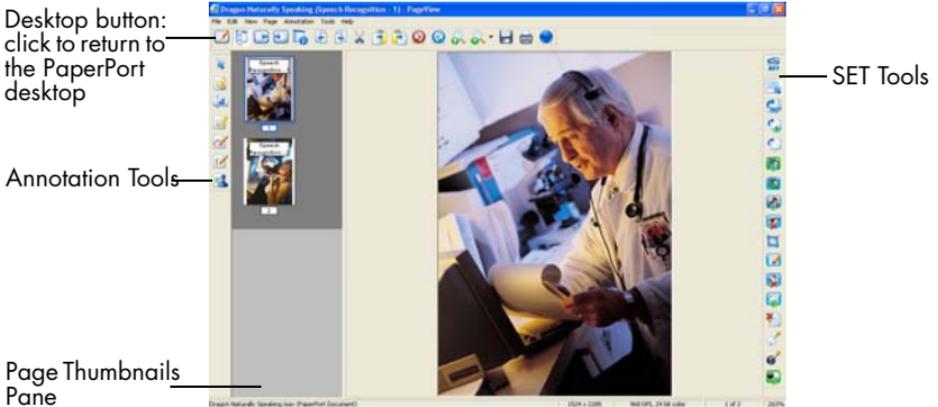
Customizable Toolbars

PaperPort's buttons are placed into five groups according to their functionality. You can move, dock, reposition toolbars, and set which buttons you want to display on the PaperPort desktop and in Page View as well. To customize a PaperPort toolbar right-click it and choose Customize... .

Set toolbar button order

More available buttons   Buttons currently visible
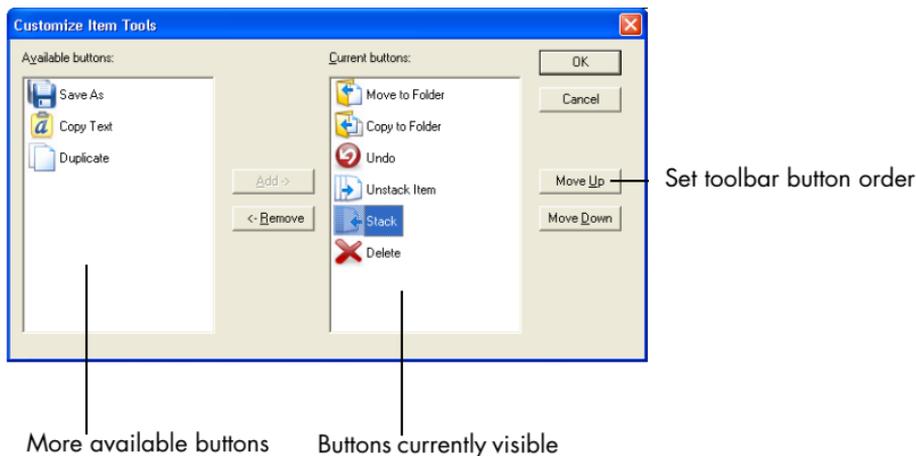
Acquiring Items

There are many ways to bring images and documents into PaperPort so that you can use PaperPort's viewing, editing, annotation, indexing, OCR, and file management tools. For example, you can:

- Scan photos, pages, and other images on a scanning device.
- Add folders to PaperPort that already contain images and documents.
- Capture snapshots of web pages.
- Import files from other programs on your computer.
- Print documents from other programs to the PaperPort desktop.
- Drag or cut-and-paste images and documents from Windows Explorer, or other programs to the PaperPort desktop.
- Acquire photos from a digital camera.
- Bring files into PaperPort Professional 11 using DesktopDelivery.

Scan to the PaperPort desktop
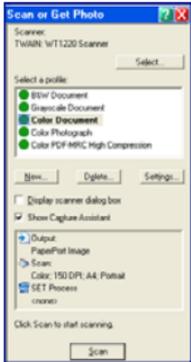
PaperPort is designed to work with TWAIN- and WIA-compatible scanners. (ISIS® scanner driver support is available on request, only in PaperPort Professional 11.)

Click the **Scan or Get Photo** button to display the Scan pane. Choose a scan profile. Profiles are optimized for typical scanning tasks.

Then choose between using the native interface of the scanner or utilizing the new Scanner Settings pane of PaperPort for best scanning results. To use the interface of the scanner driver, mark the checkbox **Display scanner dialog box**. Leaving it empty will put the scanned item onto the active Workspace.

Turn on the Capture Assistant to add subject, author and keywords to items and (in PaperPort Professional) to view and control scanning progress.
When the scan is complete, you will see your item on the PaperPort desktop.

> If your scanner does not use a TWAIN, WIA or ISIS device driver, use the program that came with your scanner to scan items. Then, copy or move the scanned items to PaperPort. Refer to the PaperPort Help for more information about scanning.

PaperPort makes it easy to scan pages as separate items or as a multi-page item. To scan and collate two-sided pages on your ADF scanner, flip the pages when prompted, click **Scan Other Side**, and PaperPort will automatically scan and collate the pages in the correct order.

You can also use your scanner device buttons to scan directly into PaperPort. Open the Windows system Control Panel, choose Scanners and Cameras, choose an event in the Events tab, and assign PaperPort to it.

> You can also use a high-speed, networked scanner to scan items to a networked folder and then add the folder to PaperPort. Use DesktopDelivery (available in PaperPort Professional 11) to monitor folders for incoming scanned images.

Set up your scanner with PaperPort

Before using PaperPort for scanning, your scanner should be installed with its own scanner driver software and tested for correct functionality. Scanner driver software is not included with PaperPort.

Properly installed and correctly functioning scanners are immediately available in PaperPort by clicking the **Select** button, and choosing one in the **Available Scanners** dialog. If you are not satisfied for your scan results, you can run the PaperPort Scanner Setup Wizard from the Start menu, under the program group PaperPort 11.0.

Using Scan Profiles

PaperPort comes with scan profiles optimized for typical scanning tasks. Choose Black and White, Grayscale or Color Document; or Color Photograph for best results.

Scan profile panels have the following tabs:

- **Profile**: displays the currently used scan profile.
- **SET**: define what enhancements you would like to run automatically.
- **Output**: set file format and automatically suffixed file names.
- **Scan**: adjust scan settings: mode, resolution, size, orientation, filter color, brightness and contrast

In PaperPort Professional 11, you can also add new profiles, or remove existing ones. This edition of the program contains an extra scan profile: Color PDF-MRC High Compression. MRC is a technology that lets you make much smaller PDF files.

> PDF Searchable Image is only available in PaperPort Professional 11, when you also have OmniPage installed on your system.

Print to PaperPort

To bring items in from other programs, you can print them to the PaperPort desktop as PDF Image or PaperPort Image (.max) items.

This feature lets you quickly import spreadsheets, pictures, database files, word processing files, and other files into PaperPort as items on the PaperPort desktop.

In PaperPort Professional, you can use Print to PDF to print the document in PDF Formatted Text & Graphics (PDF Normal) format.

You can use the Print to PaperPort capability to create print-formatted views of web pages.

Capture web pages

You can use Web Capture to capture web pages on the Internet as PaperPort Image items or PDF Image items on your PaperPort desktop. These items function as convenient pointers to your favorite web sites.

Once you capture a web page, you can view it, archive it, go to the actual web page on the Internet (MAX items only), or index the content of captured web pages.

> Use the Print to PaperPort feature to create print-formatted views of web pages, which can also be added to the All-in-One Search index for searching by text content.

Add PaperPort folders
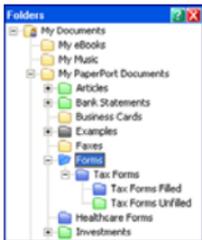
PaperPort provides an easy-to-use filing system for organizing your items and sharing them with others. In the Folders pane, you can:

- Add existing folders on your computer to the Folders pane.
- Create new folders, mapped network drives and folders on external attached devices.

Initially, the Folders pane shows a set of folders designed to help you get started using PaperPort. You can move or delete these folders whenever you prefer.

You can add folders already on your computer to the Folders pane, including network folders and folders on external devices attached to your computer. Documents within these folders are then available for use within PaperPort.

Refer to the PaperPort Help for more information about adding and using PaperPort folders.

> Use Folder Notes to assign the same file information to all PDF or MAX files arriving in a folder of your choice through scanning or DesktopDelivery.

Use DesktopDelivery
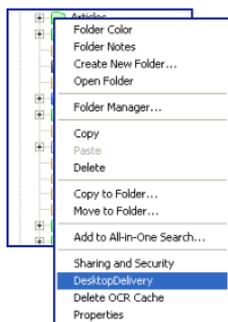
DesktopDelivery (PaperPort Professional 11 only) monitors network or local folders for incoming files of specified types (PDF, TIFF, JPEG and MAX). It can also monitor e-mail folders for attachments. It imports these files to specified PaperPort DesktopDelivery folders (i.e. PaperPort folders designated to receive files from a monitored folder outside PaperPort). Right-click on any PaperPort folder and select **DesktopDelivery** from the shortcut menu.

Monitored e-mail inbox folder

Monitored folder

You can auto-add item properties to PDF and MAX files entering the selected DesktopDelivery folder. Refer to the PaperPort How-to-Guides or Help for details.

Import pictures from your camera

To bring digital photos on the PaperPort desktop, first plug your camera in. If your device is displayed as a drive you can start acquiring your files. If your camera does not support this kind of operation, and its driver is installed properly, its TWAIN or WIA interface will display enabling you to import images from it.

> Do not edit the images on your camera in place – not all editing produces the desired result first time. Instead, bring your files into PaperPort and use the SET tools to enhance them.

Touching Up Images

When you display an image item in the Page View window, PaperPort provides several tools you can use to adjust or improve your image.

For example, you can straighten a scanned page, lighten an underexposed photograph that is too dark, adjust the color in a color picture, remove "dirt spots" from a document page, clear shadows and spots from page edges, or sharpen fuzzy pictures. In addition, you can rotate an item, remove stray dots, enhance lines, remove red eye, and crop part of an image.

Some SET Tools are primarily designed for photo, or image enhancement, while others (shaded) help you prepare items containing text for Optical Character Recognition (OCR).

Right-click on the Image Editing toolbar to choose which icons you want to display.

Scanner Enhancement Technology tools

	Select Area	Use the **Select Area** tool to select part of an image you want to cut, copy, or delete using the commands on the Edit menu or in the shortcut menu. Use it also to select part of an image before cropping or using the **Remove Red Eye** tool.
	Rotate an image	Click the **Rotate Right** tool to rotate the selected item 90 degrees to the right.
	Straighten an image	Sometimes a document is crooked when scanned. When this occurs, you can use the **Straighten** and **Auto Straighten** tools to adjust it. Straightening lines of text in an image file will yield better OCR results.
	Enhance an image	The **Auto Enhance** feature adjusts the brightness and contrast, color, and tint of an image. PaperPort analyzes the image and tries to correct whatever is wrong with it. You can manually adjust your image using the **Enhance** tool. It lets you change brightness, contrast, color and tint values and choose the best result from nine candidates.
	Sharpen an image	Select the **Sharpen** tool to adjust the sharpness of a blurry picture or blur a sharp image for special effect.
	Remove red eye	The **Remove Red Eye** tool helps you to remove the red-eye effect from a selected part of a picture. Red Eye may occur when photographing people or animals in low light or with a flash.

🖌 ⬜	Remove part of an image	When you want to save or work with only part of a page or image, you can crop the image or you can erase the part that you do not want to use. Use the **Selection** tool to define the part you want to keep and then use the **Crop** tool to remove the remainder. Select the **Eraser** tool to erase the area of the image that you draw over with the pointer.
✖	Remove stray dots	Scanned images sometimes include stray dots or "speckles". The **Remove Stray Dots** tool automatically finds and removes such "dirt" from a page. Use it for better OCR results. Works on black-and-white images.
📝	Improve lines	The **Improve Lines** tool (for black-and-white images) darkens lines and connects broken lines in a table or form to appear darker and straighter. The use of this tool will render better recognition results.
📄	Erase edges	Use this tool to clear shadows and spots from page edges to improve OCR performance.
🖊	Set white point	Click this tool, then click on a light color in the image that will become the white point. See below.
🖊	Set black point	Click this tool, then click on a dark color in the image that will become the black point. The colors chosen for the new white and black points are displayed on the Status bar.
🖊	Apply current black and white points	Click this tool to apply the new black and white points to the current image. If the result is not acceptable, undo your changes and pick new values.

Changing the black and white points

You can do this to improve image quality by removing the very dark and overexposed areas. All colors lighter than your chosen new white point will become white. All colors darker than your chosen new black point are set to black. A typical use for this is to remove a shaded gray background in a document you want to OCR. Select one of the darker gray pixels from the background and apply it as the white point. Then the background will become white. Changing black and white points for a color photo will typically increase its contrast, but may also change color values.
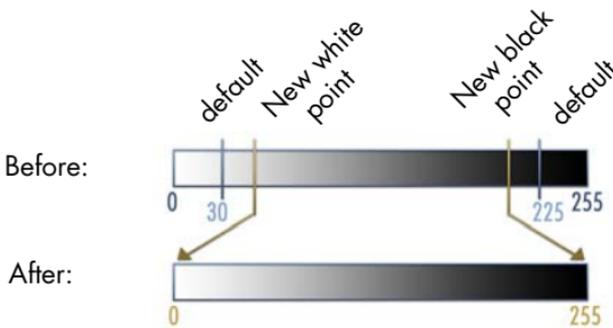
You can apply new black and white points to individual images, as described.

You can also apply them as an auto-enhancement to all new pages scanned with a given scan profile.

Edit multiple images

The ability to process items as a group is often referred to as batch processing. PaperPort provides batch processing features so that you can quickly enhance, modify, or rotate multiple image items in a single operation.

Select one or more image items on the desktop, and then, on the Item menu, point to SET Tools, and select the desired command. See the online Help for more information.

Annotating Pages

PaperPort includes a collection of annotation tools that allow you to mark up scanned documents with information you would like to keep with that document.

On PDF and PaperPort Image (.max) files, annotations are editable, meaning that you can reposition, change, or remove them – or edit textual content – whenever you want. On other types of image items, such as JPEG and Windows Bitmap files, annotations become a permanent part of the image when you save the item. For item types that cannot accept annotations, PaperPort automatically disables the annotation tools.

Using PaperPort's annotation tools, you can add notes and text, highlight text, draw lines and arrows, or stamp a picture onto an image item.

It is easy to send a document with annotations to people without PaperPort by using the PDF Image format. The recipient only has to double click on the e-mail attachment they receive from you and they will see the document in the system default PDF viewer – annotations intact.

Annotation tools

You can select an annotation tool from the Annotation toolbar whenever you display an image item in the Page View window. Right-click on a tool to change properties for future annotations created with that tool. This does not affect existing annotations. To turn off any annotation tool, click a different one – the **Select Annotation** tool is usually the best for this.

Right-click on the Annotation toolbar to choose which icons you want to display.

Select Annotation	Select this tool and click in an annotation to move, cut, copy, or resize it on the page. Double-click on a note or text label to edit its text. Right-click on a selected annotation to change just its properties.

	Note	Want to give yourself a reminder? Select the **Note** tool and add a resizable note much like a sticky note that you write on and then stick on paper documents.
	Text	Adding a text label to your images is simple with the **Text** tool. Select this tool to add a line of text with a transparent background.
	Highlighter	Use the **Highlighter** tool to highlight any area of the image, just as you might use a highlighting pen on paper.
	Pencil	The **Pencil** tool lets you draw freehand lines or marks on the page.
	Arrow or Line	Select the **Arrow or Line** tool to draw straight lines, with or without arrowheads, on a page.
	Stamp	The **Stamp** tool lets you paste the bitmapped image of your choice on the page, much like using a rubber stamp.

Protecting Items

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In PaperPort Professional 11, you can adjust the security level of your PDF files (supported up to format 1.5). When you create a new PDF from existing ones (for example, by copying a thumbnail of a page onto a Workspace) its security settings will be the same as those of the original one. Newly created PDF files will be generated according to the default PDF security settings in PaperPort, as specified under the Tools menu.

There are two types of passwords in the program. The open password restricts document accessibility: you can only open it by supplying the password when prompted. The permissions password allows users to define how the document may be used. If it is not specified, further use of the file is possible without any restrictions.

Filing Items

A key to organizing items in PaperPort is filing items in appropriate folders. You can drag and drop items from one folder to another or from the PaperPort desktop into any folder you want. You can specify search criteria to help you find your items later. Moving and copying items between folders is also possible in split view across Workspaces. The name of each item appears below the thumbnail in thumbnail view. In a multi-page item, the name appears below the individual page names.
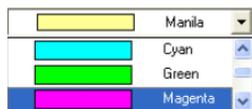
Using the Folder Manager dialog box, you can add, remove, move, and rename PaperPort folders. You can change the color of a folder icon to one that helps you organize your items. You may also add, remove, move, and rename any folder in Windows Explorer that is viewed with the PaperPort folder structure. These changes will be automatically reflected in PaperPort.

In the Folders pane, you can drag and drop, copy or move subfolders and their content to other subfolders or PaperPort folders, create or delete subfolders; or add Folder Notes. Sharing and Security, and DesktopDelivery adjustments can also be directly made for each folder shortcut menu.

The **Back** button makes it easy to step through the ordered history of folders you recently visited one by one – functioning similarly to Internet Explorer – enhancing quick backward navigation for both Workspaces independently of each other.

You can add notes to folders that are relevant to their content. A customer name, telephone number, date of birth, project ID, e-mail address are typical examples.

When scanning or using DesktopDelivery, this information can be automatically added to all PDF or MAX files entering this folder, so it is easier to search for them with the PaperPort All-in-One Search or other search utilities.

Folder Notes are automatically added only if you checkmark 'Automatically add keywords from Folder Notes' in the Output panel of the Scan Settings dialog box or (in PaperPort Professional for DesktopDelivery) in the Folder Properties dialog box.

Add search criteria to items

You can assign item properties to PaperPort Image items and PDF files, and then use the properties as search criteria to find items in PaperPort.
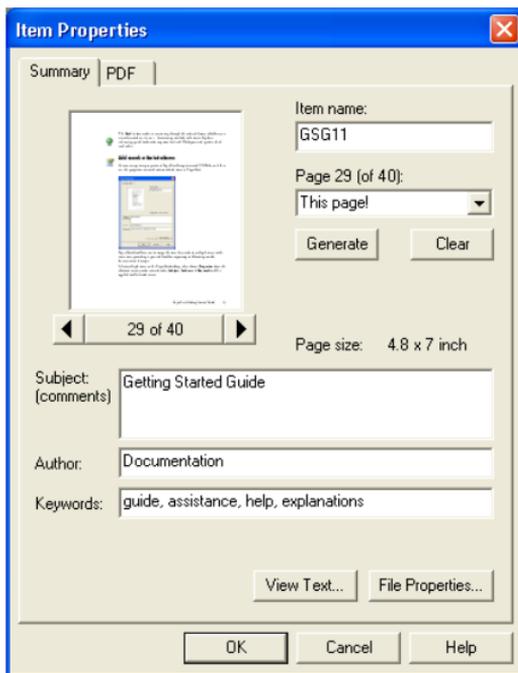
PaperPort also allows you to assign the same keywords to multiple items at the same time, providing a powerful tool for organizing and locating similar documents and images.

Select multiple items on the PaperPort desktop, then choose **Properties** from the shortcut menu; words entered under **Subject, Author** and **Keywords** will be applied to all selected items.

Another way to assign the same item properties to all PDF or MAX files arriving in a folder of your choice through scanning or DesktopDelivery is to use Folder Notes. Enter words under Subject, Author and Keywords. These words are applied only if you checkmark 'Automatically add keywords from Folder Notes' in the Output panel of the Scan Settings dialog box or (in PaperPort Professional) in the Folder Properties dialog box for DeskopDelivery.

Finding Items

PaperPort provides features to help you find your PaperPort items. You can quickly find an item by visually browsing through thumbnails on your PaperPort desktop.

When you have many folders and items, PaperPort provides more powerful capabilities with All-in-One Search.

All-in-One Search provides many options for specifying where and what to look for when finding an item, including indexed text content. The information you want to find is referred to as search criteria.

You can look for items by:

- Item properties
- Text content

Find items by their properties

You can search for any type of item by its item name.

You can also search for PDF and PaperPort Image (.max) files by item properties, such as keywords and subject information.

When you search by item properties, turn off the 'Use All-in-One Search index' checkmark, then specify criteria as follows:

- Name – item name (not necessarily that of the file).
- Author – as defined under Item properties.
- Keywords – as defined under Item properties.
- Comments – as defined under 'Subject' under Item Properties.
- Annotations – Notes or text labels added to PDF or MAX files.
- URL – The link texts of captured web pages.

> Author, Keywords, Comments and URL are available for PDF or MAX files only.

Find words in an item

To search for words within an item, you need to add the item to the All-in-One Search index and check **Use All-in-One index**. When you search using the index, you can find items that have been indexed by their properties, or text content, or both.

Specify search limits:
- all files in current folder but not its sub-folders
- current folder plus sub-folders
- all PaperPort folders and sub-folders.

Define search precision:
- Exact match finds words and common endings: search *look* finds *looks, looked*, etc.
- Approximate match finds as above and more: search *look* might find *lock*.

When the search is complete, results are displayed – each as one row of a table. Select one and click the **View Text** button to see your search phrase occurrences in their context. Click the **Copy Text** button to extract text from the file and place it onto the Clipboard. Right-click a result file and choose 'Open' to launch the document in its associated application. 'Open Containing Folder' switches to the file's folder with the file selected.

To filter search results according to file information, turn on the relevant checkboxes under **Name, author, keywords** and specify search text here as well.

Add items to the All-in-One Search index

The All-in-One Search index uses PaperPort's OCR software to extract and copy textual content from your items, and creates a database of the words or phrases in those items, much like the index of a book.

Item properties, such as name and author, are also added to the index.

Although creating an index is time consuming, searching for items in the index may be much faster than searching file by file.

Using PaperPort Options available from the Tools menu, you can specify whether you want All-in-One Search to run automatically each time you add a new item or modify an existing item. You can also set how long PaperPort should wait before starting the update process.

If you prefer, you can manually update the All-in-One Search index for all items, a single item, or all items in one or more folders. It is good practice to update the All-in-One Search index on a regular basis to shorten the length of time required to complete the process.

> Use the Index Manager in PaperPort Professional 11 to create and schedule indexing tasks on a regular basis. For quick access to your regular indexing processes, launch the Index Manager directly from the All-in-One Search pane.

Use the All-in-One Search pane

Use the All-in-One Search pane to enter search criteria and select options for finding your PaperPort items.

A file search is based on item properties only. You enter the item properties in the **Name, author, keywords** box.

An index search references PaperPort's All-in-One Search index to find item properties or actual text contained within an item. You enter the item properties in the **Name, author, keywords** box and the text content in the **Containing indexed text** box.

The search returns a list of all items that match your criteria.

> Author, Keywords, Comments and URL are available for PDF or MAX files only.

Use PDF Searchable Image

In addition to using PaperPort's proprietary search and indexing capabilities, you can also create **PDF Searchable Image** files that can be indexed and searched outside of PaperPort.
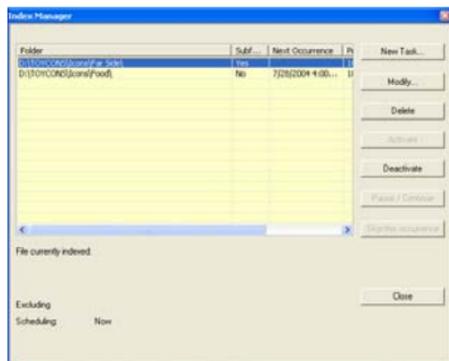
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PDF Searchable Image is a flavor of PDF. A PDF Searchable Image file contains a bitmapped image of a document or graphic with textual content stored as hidden text. This format maintains an identical appearance to the original document and enables other programs, such as Adobe ®Acrobat®, to search the contents of the file.

You can create files in **PDF Searchable Image** format, if you have ScanSoft **OmniPage** (the professional version of OmniPage 11 or higher) installed **together** with PaperPort Professional 11.

Schedule indexing tasks

The Index Manager is a PaperPort Professional 11 application designed to create, modify and schedule indexing tasks for a given local or network folder. Indexed files can afterwards be searched with the All-in-One Search.

For new tasks you can set which folder to browse (local or network) with subfolders included or excluded, set timing and recurrence (duration, pattern and range), activate and deactivate a task, pause its completion, or skip a task occurrence. In the program settings dialog box, you can specify how and when the Index Manager should stop.

Sharing Files

PaperPort provides many tools to make it easy for you to share files, images, and documents with friends, colleagues, and business associates.

These tools are built-in to the program and are readily available on toolbars, menus, and command bars for quick access whenever you need them.

To help you share your items with others, PaperPort makes it easy to:

- E-mail items to others, simply by dragging the items to your favorite e-mail program on the PaperPort Send To bar.

- Scan or convert items to the PDF format, the ever-popular file-sharing format considered by many as the industry standard for document distribution.

• Access shared folders located on your local or wide area network, by adding the folders to your PaperPort Folder pane.

• Access Sharing and Security settings directly from the folder shortcut menu.

With PaperPort, it is simple to set up a shared folder on a server or a PC that can act as a central repository for all important office documents. Each PaperPort client can connect to that folder and use PaperPort's document management features and paper handling tools to find and use documents instantly.

In addition, you can convert items to popular output formats for shared use in numerous other programs. To obtain a list of all supported program links, visit PaperPort at the Nuance web site at **www.nuance.com**.

Sending Items to Other Programs

Drag and drop functionality makes opening your files in your favorite programs a snap. Simply choose the file you want and drop it onto the program icon on the Send To bar at the bottom of the PaperPort desktop.

Common office tasks like e-mailing and faxing are now faster than ever. The Send To bar makes using scanned documents in other applications easier by automatically translating the document into a form that the receiving application can understand.

For example, you can drop a scanned image of a letter onto the Microsoft Word link on the PaperPort Send To bar, and PaperPort will recognize that the application you are attempting to open needs a text file rather than an image file. PaperPort will run OCR for you, and send editable text to Word rather than a static image file.

OmniPage   OP Workflows   Microsoft Outlook®   PDF Converter

PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs. The program link on the Send To bar does any necessary conversion and may provide options for sending the item.

Use OmniPage with PaperPort

If PaperPort exists on a computer with OmniPage, its OCR services become available and amplify the power of PaperPort. You can choose an OCR program by right clicking on a text application's PaperPort link, selecting Send To Options and then selecting OmniPage as the OCR package, instead of the always available PaperPort OCR.

With OmniPage you can:

- Instantly convert paper into usable Microsoft Office documents.
- Turn PDF files into editable documents while retaining their layout.
- Create unlimited searchable PDF files for electronic archives.
- Automatically process images from network MFPs and scanners.
- Scan and convert documents into XML, PDF, TIFF and more.
- Share documents using e-mail, Web, XML and e-Books.
 - Use OmniPage workflows for instant but effective control over document conversions.

Customize the Send To bar

You can change the way program icons appear on the Send To bar in a number of ways. Specifically, you can add programs, and remove or rearrange program icons. Refer to the PaperPort Help for details.

Adjust Send To options

You can tune Send To options to specify how you want to use a certain program on the Send To bar. For example, you can specify the file format in which PaperPort will save an item.
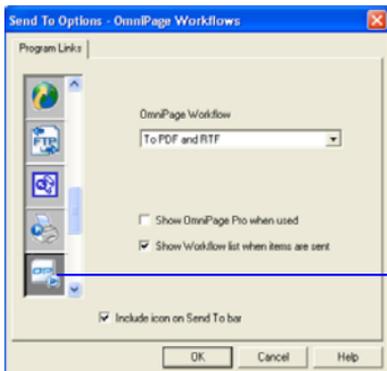
If you have the professional version of OmniPage 14 or above on your system, use the Send To options for the OmniPage Workflows link to choose a workflow.

To e-mail an item, simply drag and drop the item to your e-mail program on the Send To bar. Use the e-mail link options to specify the file format of the attachments and other options.

Converting Items

Using PaperPort, you can convert scanned documents and text items to image formats, and convert images back to text.

Convert items to image formats

You can convert scanned documents and text items to image formats.

The **Save As** command allows you to save image items to any of a variety of standard image formats including PDF, JPEG, and TIFF, as well as the native PaperPort Image format (.max).

You can convert text items and image items to PaperPort Image items (.max) using the **Duplicate as PaperPort Image** command. The **Duplicate as PDF Item** command allows you to convert text items to PDF Image items.

In PaperPort Professional 11, you can also convert text items such as Word documents, to PDF Formatted Text & Graphics format.

By selecting more than one item, you can convert multiple items to a new format at the same time. Refer to the online Help for details.

Assembling documents

You can assemble documents by stacking or combining.

You can **stack** a group of PDF or PaperPort Image (MAX) files into a single PDF or MAX, respectively. The files to be selected need to be in a single folder, and selected in the order you want them in the stack. Then click the Stack button and choose Stack from the drop-down list, or choose Stack from the shortcut menu. Original page sizes are conserved in the stacked document. The source files do not remain after stacking.

You can **combine** image, MAX and PDF items. The target is a PDF file. The following combination options are available:

- **Combine into PDF stack**: Each original page becomes one PDF page with no resizing.

- **Combine into Multi PDF, resize to fit**: This resizes the contributing items and always places four original pages onto a single PDF page.

- **Combine into Multi PDF, maintain original sizes**: This places as many original pages onto each PDF page as it can.

- **Combine into thumbnail PDF page**: This creates thumbnails of all item pages and fits as many as possible on a PDF page.

> The original items remain in their original file types.
>
> Combining usually takes more time than stacking because of PDF generation.
>
> PaperPort Professional can additionally combine text items. To convert a text item, the application that created it must be available on your system.

Convert images to text

You can convert scanned documents to text by a simple drag and drop of the thumbnail to your word processor program. PaperPort automatically processes your scanned document using PaperPort's OCR software, launches your word processing program, and loads the scanned text into a document ready for editing.

PaperPort also allows you to copy text from part of an image item for use in a text editing, word processing, or spreadsheet program.

The OCR software processes the text and copies it to the Windows Clipboard. Open the program in which you want to insert the text, and use Paste to paste the text in a file.

Filling Out Scanned Forms

FormTyper™ is a PaperPort program that enables you to fill in forms, such as insurance forms, registration cards, and medical forms, that you scan to the PaperPort desktop.

You simply drag a form from the PaperPort desktop to the FormTyper program on the Send To bar. FormTyper automatically analyzes the form, recognizes the blank areas in which data can be entered, and creates blank fields for the data. So that you can easily see where to enter data, FormTyper underlines each field in color.

Now, you can quickly type and tab to each field. You can also quickly reposition fields, insert new fields, and remove fields as necessary. After you enter data and complete the form, save the form to the PaperPort desktop so that you can print or e-mail the form in its entirety with its completed data.

If you have a pre-printed form, use the Print Only Fields tool to print your responses directly onto the form.

Creating PDF Documents

PDF (Portable Document Format) files are often classified into three different types, commonly called flavors:

- **PDF Image**
- **PDF Searchable Image**
- **PDF Formatted Text & Graphics (PDF Normal)**

You can create one or more of these PDF flavors, depending upon your version of PaperPort software. Refer to the PaperPort online Help for additional details.

This table lists which features are available for creating each type of PDF in PaperPort 11 and PaperPort Professional 11:

Format	PaperPort 11	PaperPort Professional 11
PDF Image	Scan	Scan
	Get Photo	Get Photo
	Print to PaperPort	Print to PaperPort
	Save As	Save As
	Web Capture	Web Capture
PDF Searchable Image (OmniPage required)	Scan	Scan
	Get Photo	Get Photo
	Print to PaperPort	Print to PaperPort
	Save As	Save As
	Web Capture	Web Capture
		Duplicate Item
PDF Formatted Text & Graphics	Scan	Scan
	Get Photo	Get Photo
		Print to PaperPort
		Duplicate Item

Using ScanDirect

ScanDirect™ is a PaperPort program that enables you to scan items and send them directly to PaperPort or other programs on your computer without first running PaperPort.

ScanDirect runs as a separate program from the Windows **Start Menu** and displays the ScanDirect bar.

Using ScanDirect, you can scan an item and immediately send the item to either:

- A program on the ScanDirect Send To bar – Icons on the ScanDirect bar represent the programs that are linked to PaperPort and to ScanDirect. To scan and then send an item to a certain program, click the program icon, and then scan the item. ScanDirect will automatically start that program when the scan is complete.

- The PaperPort desktop – To scan and then work with the item in PaperPort, click the PaperPort icon, and then scan the item. When the scan is complete, PaperPort starts and displays the item in PaperPort. You can then use all of PaperPort's features on the item.

Refer to the PaperPort Help for more information about using ScanDirect.

Uninstalling PaperPort

1. Select Add/Remove Programs from the Control Panel.

2. Select ScanSoft PaperPort 11.0.

3. Click **Remove** to uninstall the program or **Change** to auto-repair it.

A de-activation step is performed at the start of un-installation, allowing you to reinstall the program later without re-activation problems. De-activation and re-activation require web access.