ScanSoft®

PaperPort® SE

Getting Started Guide

C O P Y R I G H T S

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PaperPort SE Getting Started Guide
July, 2003

C ONTENTS

Annotating Pages

Filing Items

Finding Items

Sharing Files

Sending Items to Other Programs

Converting Items

Welcome to PaperPort

Welcome to the *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 thumbnails allow you to visually organize, retrieve and use your scanned documents. PaperPort's editing tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

Installing 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.

Registration

Registration enables you to take full advantage of ScanSoft 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 ScanSoft, Inc. web site at **http://www.scansoft.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 ScanSoft web site.

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 on the PaperPort Help menu.

Using release notes

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

Technical Support

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

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.

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.

Main toolbar

Folders

Send To Bar

Document thumbnails

Desktop
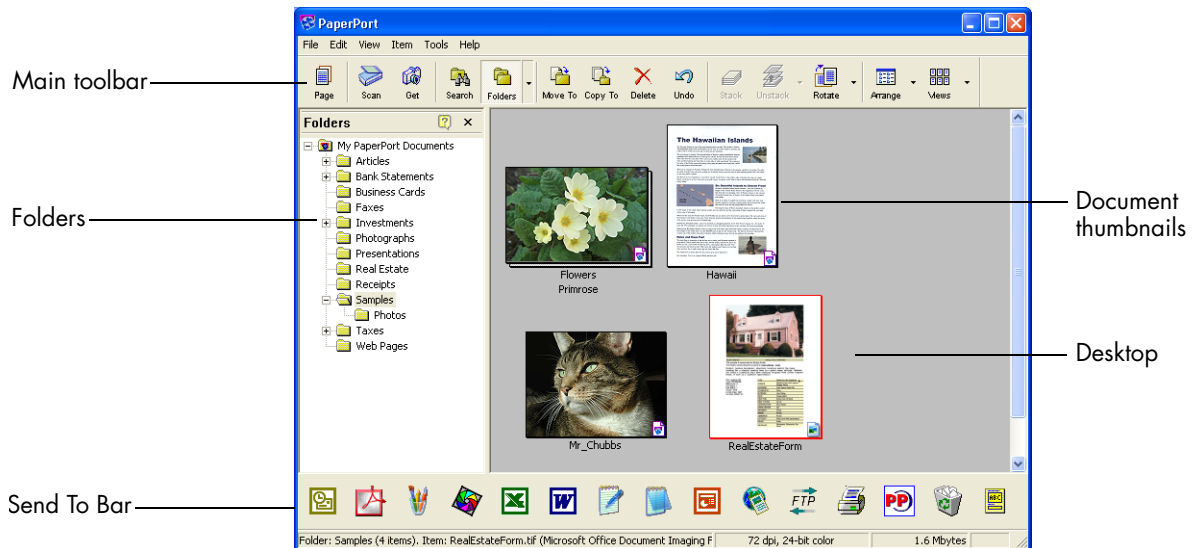
PaperPort items

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 quickly send an item to another program without leaving the PaperPort program. 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 **Samples** folder containing items to demonstrate some of the types of items you can keep on the PaperPort desktop.

The Folders pane
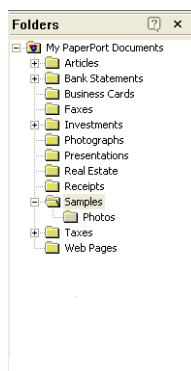
The **Folders** pane presents a hierarchical view of your PaperPort folders, similar to the view you see in Windows Explorer.

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.

Although you cannot remove My PaperPort Documents from the Folders pane, you can delete all subfolders whenever you prefer. 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.

To show or hide the Folders pane, click the **Folders** button on the Command bar.

PaperPort thumbnails

One quick way to locate your PaperPort items is to visually browse through the thumbnails on your PaperPort desktop. Each thumbnail is a small, graphic representation of your document or photo. 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 many formats, such as BMP, TIFF, JPEG, and MAX

- PDF Image items

Text items have generic thumbnails displaying only the document type and item name.

Each 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 $\boxed{\downarrow}$ to let you scroll through the pages.

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 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.

• 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.

Just as you can organize and arrange documents on your physical desktop, you can quickly rearrange the items on the PaperPort desktop. For example, after selecting a thumbnail, you can reposition it or rotate it.

Using 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.

The Page View window

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.

To view an item in the **Page View** window, double-click a thumbnail, or select the item and click the **Page** button on the **Command** bar.

Annotation Tools

Image Editing Tools
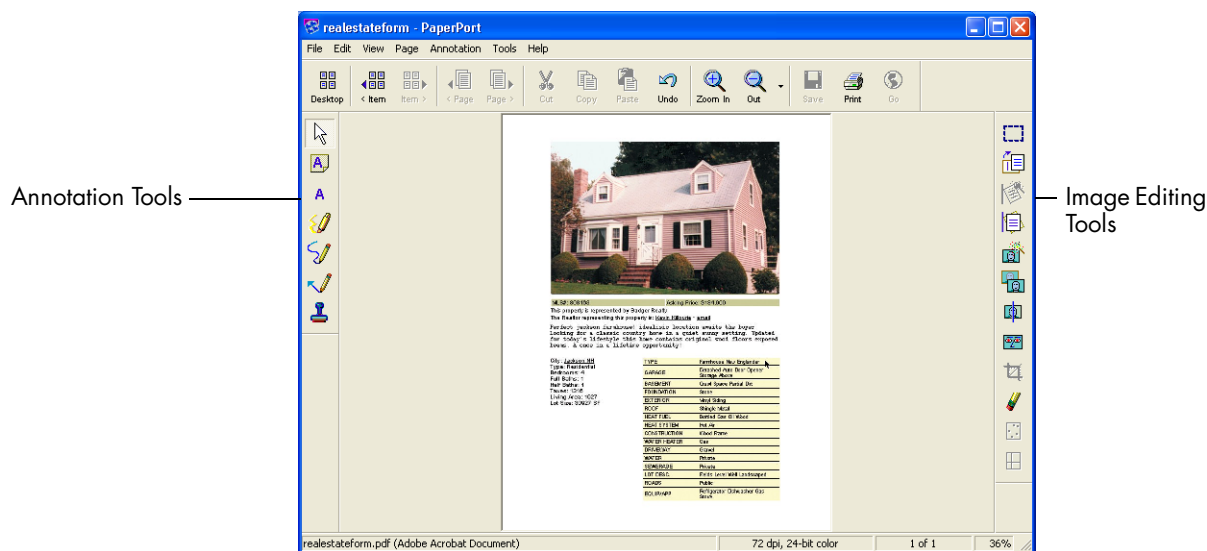
Click the PaperPort desktop button to toggle back to the PaperPort desktop at any time.

Acquiring Items

There are many ways to bring images and documents into PaperPort so that you can use PaperPort's viewing, editing, annotation, 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.

- 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.

- Download photos from a digital camera.

Scan to the PaperPort desktop

PaperPort is designed to work with TWAIN- and WIA-compatible scanners.

Use the **Scan pane** to call up your scanner's program to bring images and documents into PaperPort so that you can use PaperPort's features.

When the scan is complete, you will see your item on the PaperPort desktop.
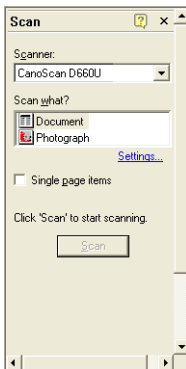
> If your scanner does not use a TWAIN or WIA device driver, use the program that came with your scanner to scan items. Then, copy or move the scanned items to PaperPort. Refer to the PaperPort Help for more information about scanning.

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 a high-speed, networked scanner to scan items to a networked folder and then add the folder to PaperPort.

Print to PaperPort

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

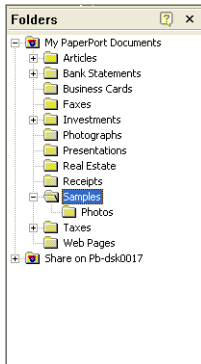This feature lets you quickly import spreadsheets, pictures, database files, word processing files, and other files into PaperPort as items on the PaperPort desktop.

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

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 devices attached to your computer.

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.

Import files

You can use the Import file feature to bring an image file, such as those in the PDF, BMP, JPEG, and TIFF format, created in another program to the PaperPort desktop. The image file you import becomes a PaperPort Image item on the PaperPort desktop.

In addition to using the Import command, you can also copy and paste or drag and drop documents and images directly onto the PaperPort desktop.

When you are finished, you can easily convert the files to a different format if desired.

Download pictures from your camera

To get digital photos on the PaperPort desktop, you can download your photos from a TWAIN- or WIA-compatible camera. If your camera does not use a TWAIN or WIA device driver, use the photo download program that came with your camera to get your photos into your computer and drag and drop the photos to PaperPort. Refer to the PaperPort Help for more information.

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, 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.

Image editing tools

Select image	Use the **Selection** tool to select part of an image you want to cut, copy, or delete using the commands on the Edit 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** 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.	
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 the image. You can manually adjust your image using the **Enhance** tool.	
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 that occurs 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 **Erase** 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.
	Improve lines	The **Improve Lines** tool darkens lines and connects broken lines in a table or form to appear darker and straighter.

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 Adobe Acrobat – 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.

	Select Annotation	Use this tool to select an annotation so that you can then move, cut, copy, or resize it on the page.
	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.
	Scribble	The Scribble 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.

Filing Items

Once you have acquired PaperPort folders and the items within them, you can:

- Copy, move, rearrange, and rename folders to better group and organize your items.

- Color-code your folders to help identify or classify your folders.

- Drag and drop items from the PaperPort desktop to any folder, as well as drag and drop folders to other folders.

- Specify search criteria to help you find your items later.

Work with PaperPort folders

Using the PaperPort Folders dialog box, you can add, remove, move, and rename PaperPort folders.

In the Folders pane, you can drag and drop, copy or move subfolders and their content to other subfolders or PaperPort folders, create subfolders, and delete subfolders.
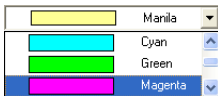
Color-code folders

You can change the color of a folder icon to one that helps you organize your items. Color-coding is useful when you want to find items quickly by importance, based on your own personal color preferences.

Work with 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.

When you copy an item to a new location, the original item remains in the original location.

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. The more descriptive the name, the easier it is for you to quickly locate the item.

Add search criteria to items

You can assign item properties to PaperPort Image items and PDF Image items, and then use the properties as search criteria to find items in PaperPort.
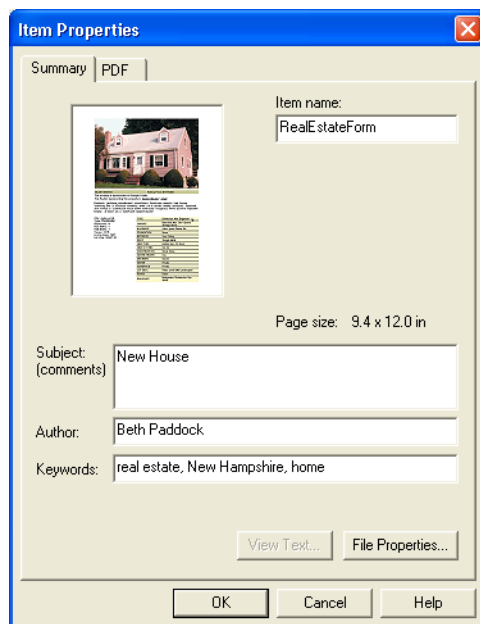
Finding Items

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 **SimpleSearch**.

SimpleSearch provides many options for specifying where and what to look for when finding an item. The information you want to find is referred to as search criteria.

You can look for items by item properties.

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, you can specify criteria of an item name, author, added comments or keywords, or text in annotations.

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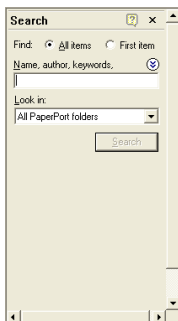
Use the Search pane to enter search criteria and select options for finding your PaperPort items.

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

SimpleSearch returns a list of all the items that match the criteria you specify.

Sharing Files

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

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.
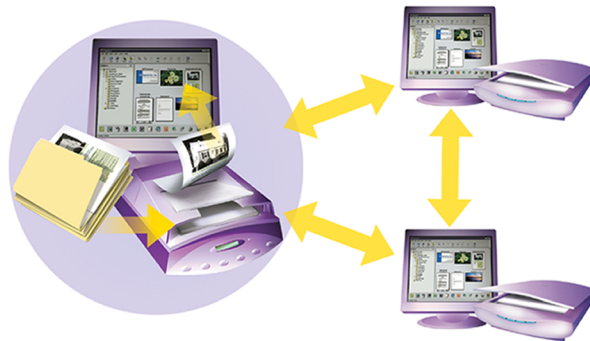
In addition, you can convert items to popular output formats for shared use in numerous other programs, such as Microsoft Word, Adobe Acrobat, Claris HomePage, and Adobe Photoshop. To obtain a list of all supported program links, visit PaperPort at the ScanSoft web site at www.scansoft.com.

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.

E-mail link   MS Word link

PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs.

Icons in the **Send To** bar identify the programs to which you can send your PaperPort items. These programs are often referred to as linked programs. The program link on the Send To bar does any necessary conversion and may provide options for sending the item.

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.
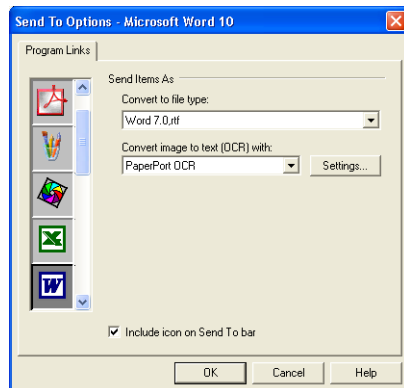
Customize the Send To bar

You can change the way program icons appear on the Send To bar in a number of ways. Specifically, you can:

- **Add a program.** If you have a program on your computer that is not shown on the Send To bar, you can add it to the Send To bar by using the New Program Link wizard.

- **Remove a program icon.** You can also remove seldom-used program icons from the Send To bar, and then include removed programs later if needed. In addition, you can delete program icons that you have added to the Send To bar.

- **Rearrange program icons.** If you do not like the arrangement of the program icons on the Send To bar, you can move them to new positions.
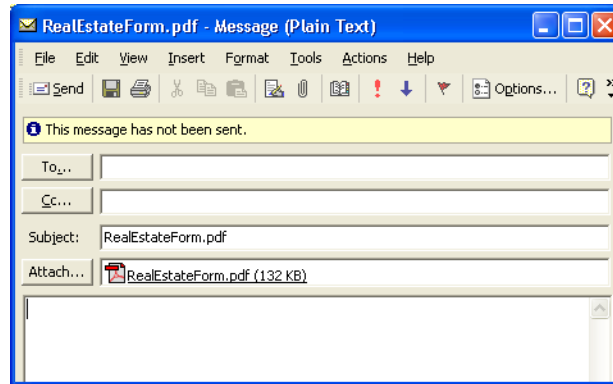
Refer to the PaperPort Help for details.

Send items as E-mail attachments

PaperPort works with many popular e-mail programs.

To e-mail an item, simply drag and drop the item to your e-mail program on the Send To bar. The e-mail program starts, and PaperPort attaches the item to the new e-mail message.

Use the e-mail link options to specify the file format of the attachments and other options. It is good practice to use an industry-standard or popular file format, such as JPEG and PDF, when sending e-mail attachments.

JPEG is a popular format for photos and single page items. Documents and multi-page items can be sent as PDF or TIFF files.

The recipient receives the message and can open the attachment to view the item you sent.

For more on sending items as e-mail attachments, see the PaperPort Help.

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 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).

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.

In the Page View window, 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.