

Scan to PC Desktop Professional Workgroup Edition v8 Orientation Guide



SCAN TO PC DESKTOP
Professional
WORKGROUP EDITION v8

*Maximizing Your Productivity with Scanning and
Your Xerox WorkCentre Pro Multifunction Device*

Training Topics:

- Scanning to the Desktop
- Scanning to the Desktop - Settings
- Introducing the PaperPort Desktop
- Splitting Desktop and Viewing Page Thumbnails
- Working with Documents from Any Folder
- Working with ePaper on the Desktop
- Combining Documents on the Desktop
- Creating PDF Files
- Creating Secure PDF Files
- Creating Text Searchable PDF Files
- PDF Editing
- Managing Documents at the Desktop
- Linking to Additional Applications
- Repurposing Documents - OCR



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Advanced Topics*:

- Advanced OCR
- Create Audio Documents from Paper and Digital Documents
- OCR Batch Processing
- Paper to Digital Forms Conversion
- PDF Batch Conversion

**Advanced Topics will not be covered in Nuance's web-based Scan to PC Desktop End User Training Sessions unless specifically requested.*

Scanning to the Desktop

Scanning at the Xerox WorkCentre Pro

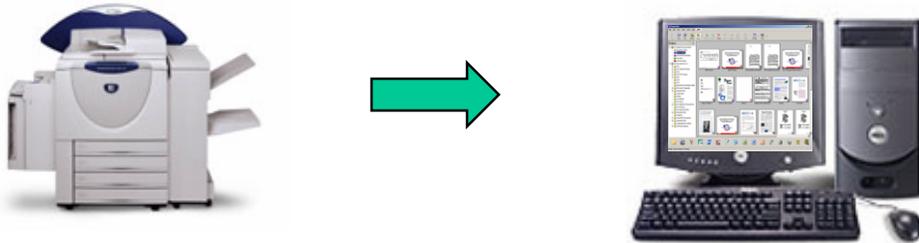
The PaperPort Image Retriever tool included with Scan to PC Desktop completely automates the scanning process so that each new scanned image is there waiting for you on your PaperPort desktop by the time you physically return to your office from scanning at the MFP.

1. Load the paper into the document feeder on the Xerox WorkCentre Pro.
2. Select “Network Scanning” from the control screen.
3. Select your template from the list

OR

Use the scan-to-email feature to email the scanned images to yourself as an email attachment.

4. Press the green Start button. Walk back to your PC and Image Retriever will deliver the scanned image back to your PC and save it onto the PaperPort Desktop. The PaperPort Desktop will be open and your scanned image will be on the PaperPort Desktop with a red box around it.

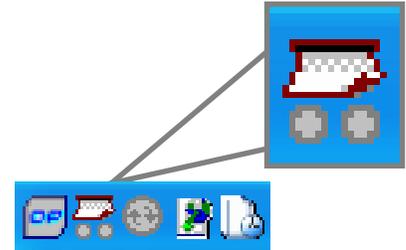


Scanning to the Desktop - Settings

You can adjust the Image Retriever Settings to control how scanned images are delivered to your PC.

Starting Image Retriever

1. If Image Retriever is already running on your PC, you will see the Image Retriever icon in your Systray in the lower right corner of your Windows Desktop near the clock.
2. If it is not running on your PC, go to Start > All Programs > ScanSoft PaperPort Pro 10.0 > Image Retriever. The Image Retriever icon will appear in System Tray in the lower right corner of your Windows Desktop near the clock.



Adjusting Image Retriever Settings

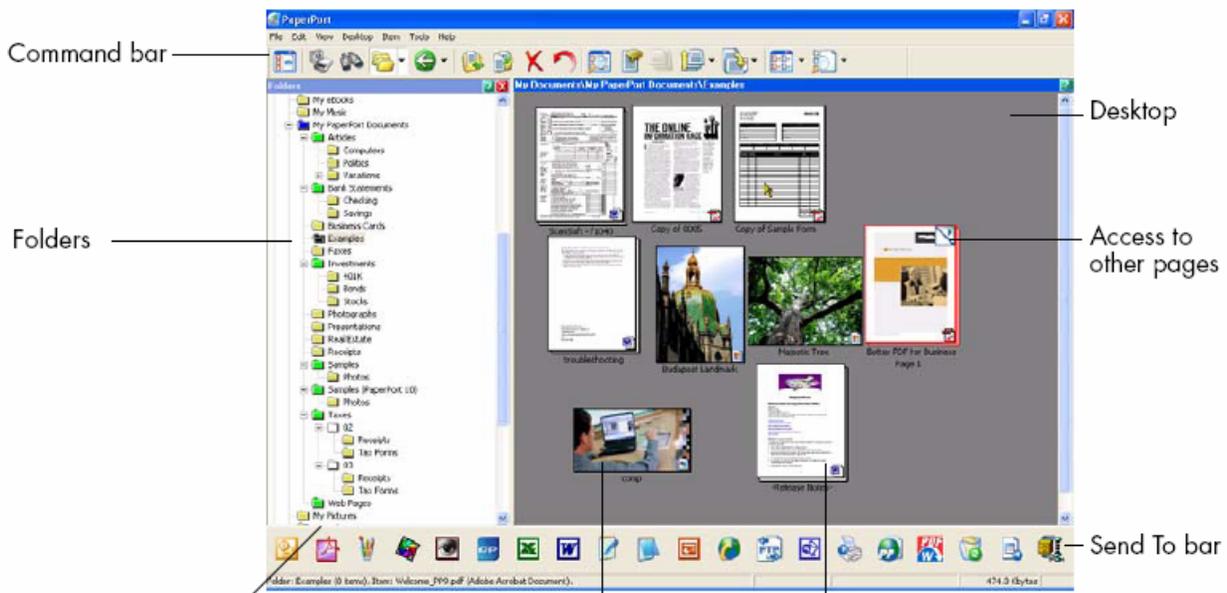
1. Double click on the Image Retriever icon in the Systray.
2. From the Image Retriever Settings window, select the desired settings for the Image Retriever tool:
 - From the Watch Settings, select if you would like Image Retriever to monitor your email inbox, a network folder, or both.



- Select the interval with which you would like Image Retriever to monitor your selected folder. As an alternative, you can select “Never” from the “Interval for Checking” drop-down menu. If you select “Never, you can click on the “Get Now” button to manually retrieve your images.
- Browse to the folder where Image Retriever should deliver your scanned files.
- Select “Run PaperPort in a Window” when documents are retrieved.
- Select OK to close the window.

Introducing 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, images, and PDF files.



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

Working with Documents from Any Folder

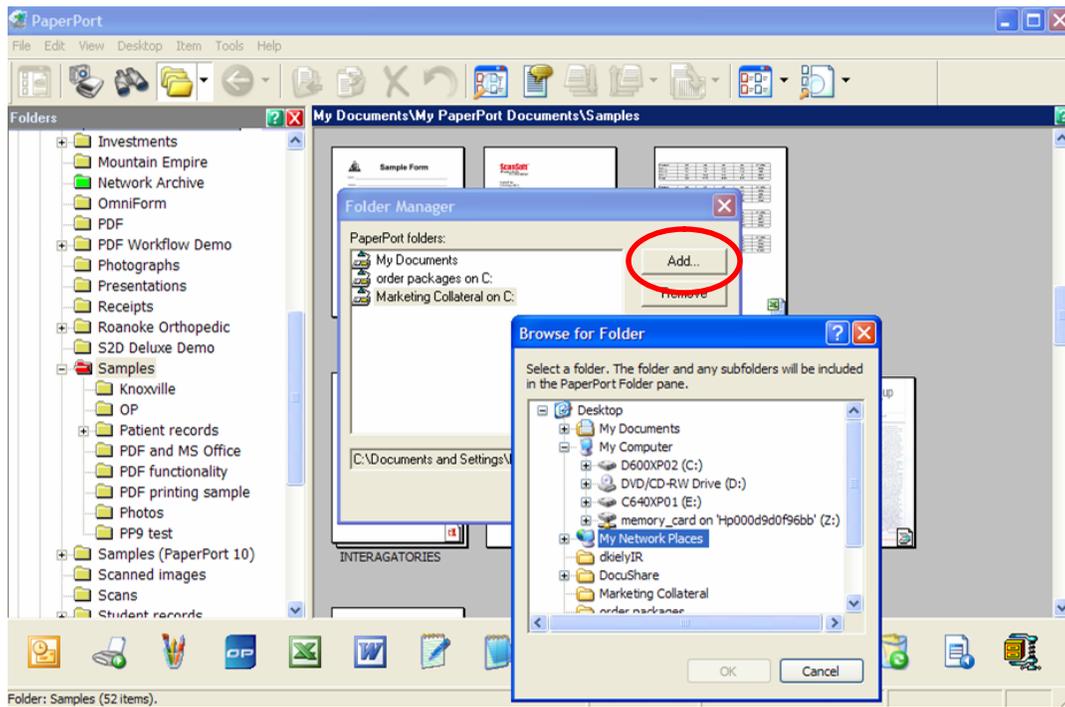
PaperPort folders are simply Windows folders that you want to use with PaperPort. PaperPort displays folders in the Folders pane on the left side of the PaperPort desktop. Initially, the Folders pane shows a set of folders designed to help you get started using PaperPort.

Adding additional folders to PaperPort's Folder View

Your PaperPort Desktop integrates seamlessly with your existing Windows Explorer file structure.

To add a new folder to your PaperPort Desktop:

- Select the Folder icon from Command Bar.
- Select "Folder Manager" from the drop-down menu.
- Select "Add" from the Folder Manager window.
- Browse to folder you want to add (local or network) and select OK. Then close the window. Your newly added folder will appear at the bottom of the Folder Pane
- Folders can be color coded to aid in organization by selecting the folder in the Folder Pane, right click on the mouse and selecting Properties from the drop-down menu.

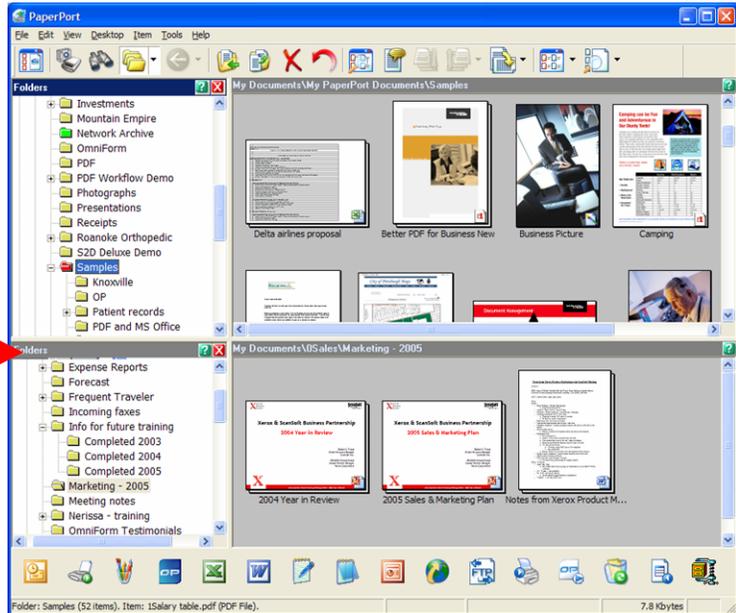


Splitting Desktop and Viewing Page Thumbnails

Split Desktop

Splitting the desktop into two parts makes it easier to copy and move items and pages between different folders.

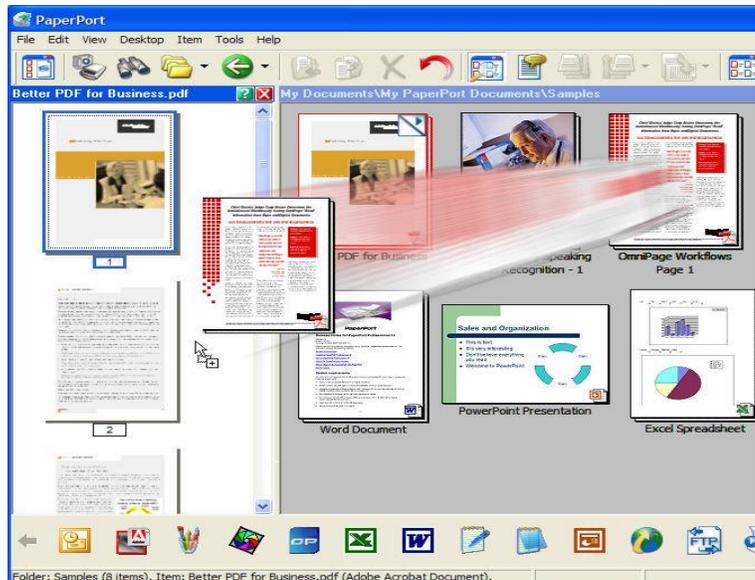
1. To split the desktop, go to Desktop > Split Desktop. A horizontal splitter will appear which is moveable.
2. Place the cursor on the splitter and drag the splitter up and down to the desired location.



Page Thumbnails

The Page Thumbnails pane displays the page thumbnails of a selected PDF file in Desktop View.

1. Click once on the PDF file to select it.
2. Go to View > Page Thumbnails. Each page of the PDF file will be displayed in the left pane.
3. You can use this pane for reordering pages in a multi-page document with drag and drop, inserting pages, deleting pages, copying pages, and cutting pages.

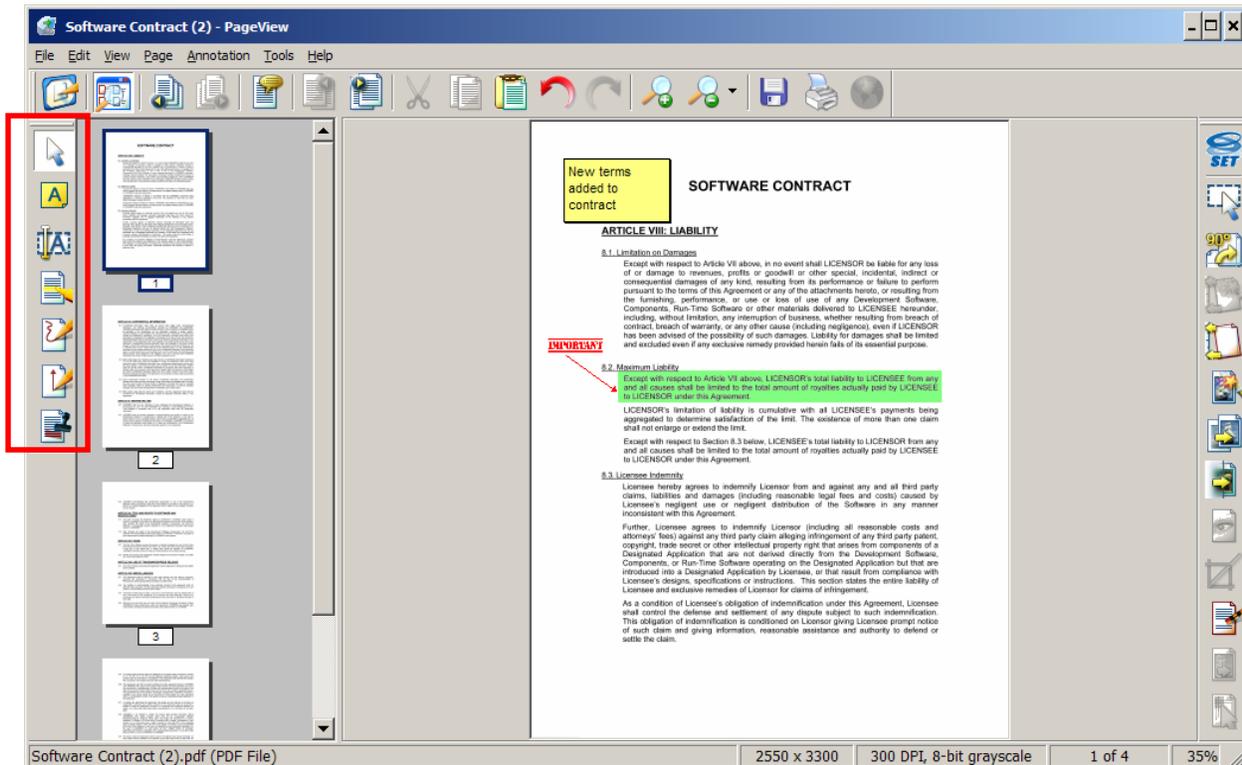


Working with ePaper on the Desktop

ePaper is represented on the PaperPort desktop as PDF files. The PaperPort desktop displays all files as visual thumbnails (MS Office, PDF, TIFF, and JPEG).

Annotating scanned images and PDF files

1. To annotate a scanned image or a PDF file, double click on its thumbnail on the PaperPort Desktop to launch the file in Page View.
2. All annotation options are available to you by selecting the icons on the left vertical column of the Page View or by selecting Annotation from the Menu Bar.
3. To save the annotations with your image, just select the Desktop icon and select Yes to save the annotations.

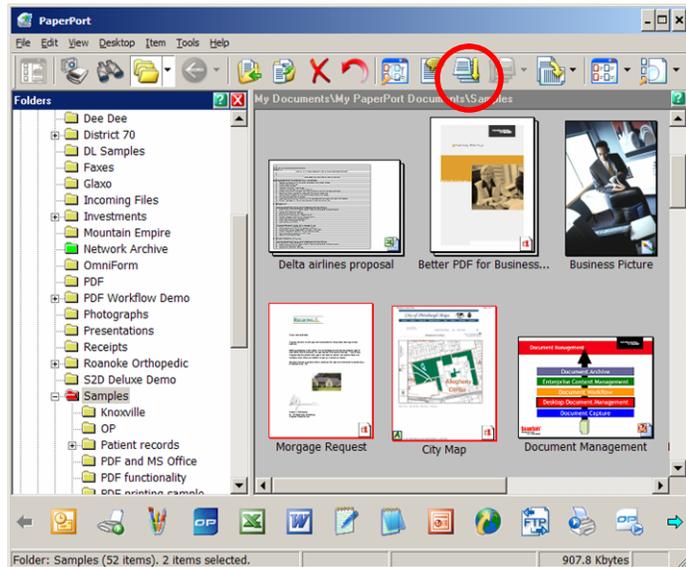


Combining Documents on the Desktop

You can combine, or stack, individual PDFs or documents of different file types into multipage PDFs.

Stacking and Unstacking PDF files

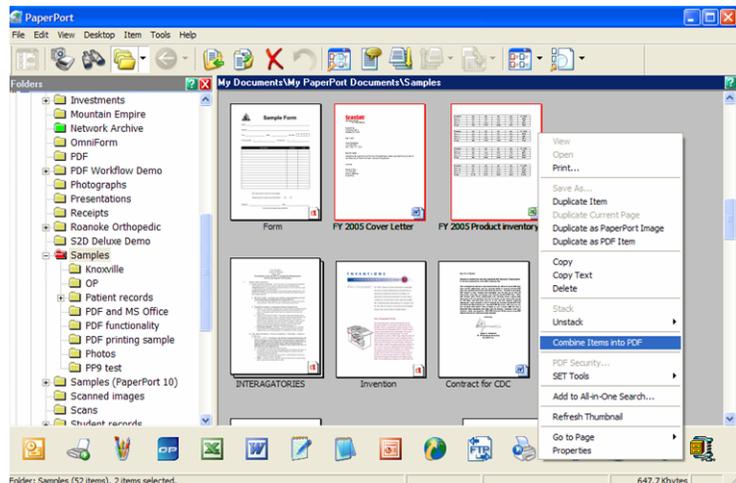
1. PDF file thumbnails can be copied, stacked and unstacked just as you would with physical paper documents.
2. To stack, or combine, two PDF images one on top of the other to create a new document, you can either:
 - Select one PDF and then drag that image with the mouse on top of the other PDF file.



- Select both images you want to combine using the mouse and holding down the Control key at the same time. Then select the Stack icon from the Command Bar.
- In both cases, the result will be a combined new PDF file with multiple pages.

Combining Multiple Files into PDF Files

1. Select documents or images that you want to combine using the mouse and holding down the Control key at the same time. These items can be different file types. For example, you could select a MS Word and MS Excel file.
2. Right click and select "Combine Items into PDF".
3. A copy of each of the selected files will be combined into one multipage PDF file and the PDF file will be saved on the PaperPort Desktop.

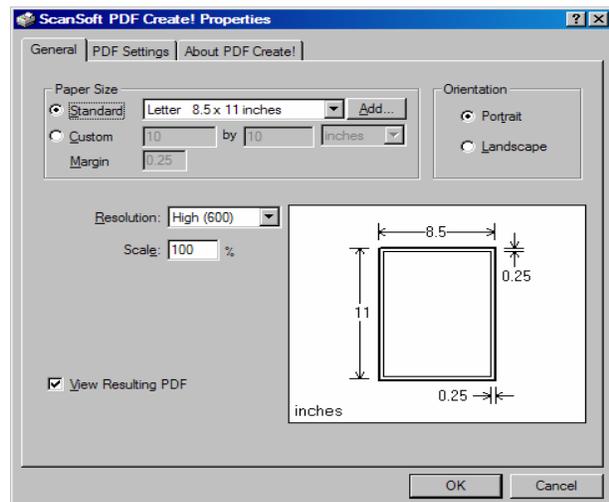
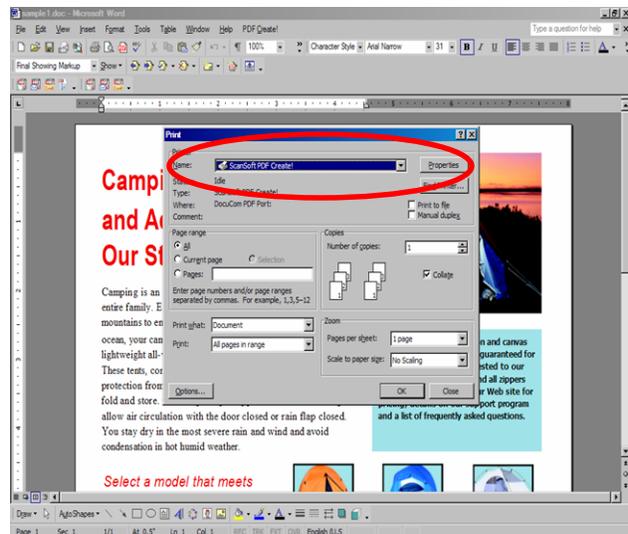


Creating PDF Files

Combining paper documents and digital documents typically requires several steps...printing, scanning...and lots of time. With PaperPort Professional 10, documents from all of your MS Office applications can be printed directly to the PaperPort Desktop and then automatically combined with scanned images to create a new unified digital PDF documents. Also, you can convert batches of documents into PDF files using PDF Create!. Please see the Advanced section of the Orientation Guide for information on batch creation of PDF files for archival or distribution purposes.

Creating PDF files from Inside of Other Applications

1. PaperPort Professional 10 includes a Print Driver that enables you to print a PDF file from any desktop application directly to the PaperPort desktop or to the location of your choice.
2. From within the desired application, go to File > Print and then select "ScanSoft PDF Create!" as your printer.
3. To specify additional properties for the file when using ScanSoft PDF Create!, click the Properties button to the right of the printer list. Physical properties of the PDF are represented on the first tab, and additional options such as watermarks and security are available on the second tab.
4. Select OK and you will be prompted to select where you want your PDF files saved.
5. If you choose to save the PDF file back to a PaperPort folder, this new PDF file can then be stacked with any of your existing PDF images to create a new document.



Creating Secure PDF Files

In PaperPort Professional 10, you can adjust the security level of your PDF files. 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.

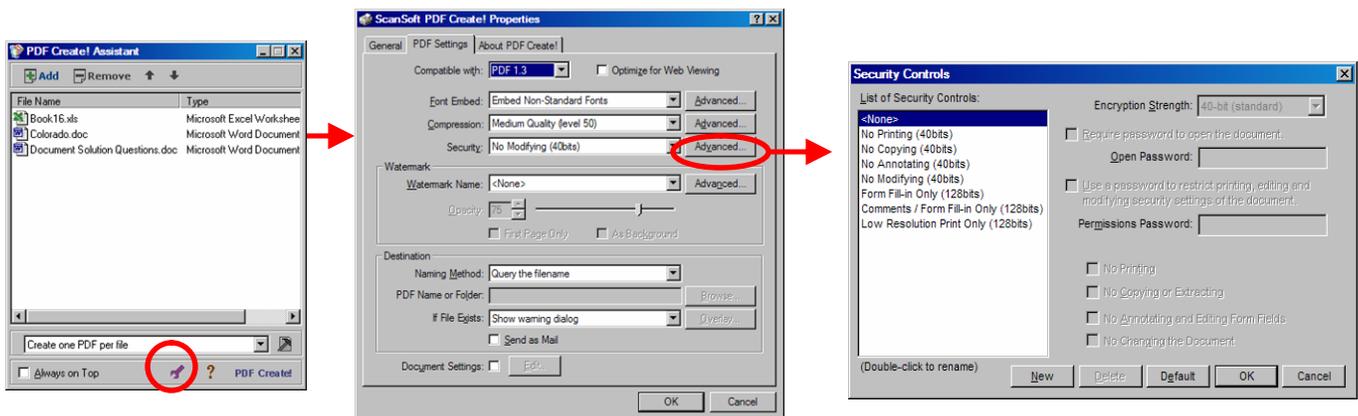
PDF Security from the PaperPort Desktop

1. To control PDF Security Settings from the PaperPort Desktop, right click on the PDF and select “PDF Security”.
2. From the “PDF Security” window, check the options to control opening, printing, or editing the PDF file.
3. Click on “OK” to activate your security settings for the PDF file.



PDF Security from the PDF Create! Assistant

1. To control PDF Security Settings from the PDF Create! Assistant, click on the wrench icon to open the “PDF Properties” window.
2. Click on the “PDF Settings” tab, and click on the “Advanced” button next to the Security drop-down menu to access the security controls for that document.

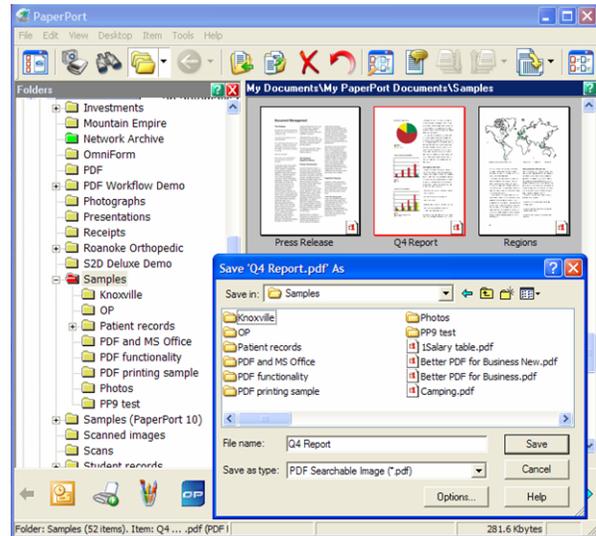


Creating Text Searchable PDF Files

Text searchable PDF is the file format of choice for digital archiving applications. With PaperPort Professional 10 and OmniPage Pro 15 installed on your PC, converting paper to a fully text searchable PDF file is an automatic process directly from your PaperPort desktop or directly from the network.

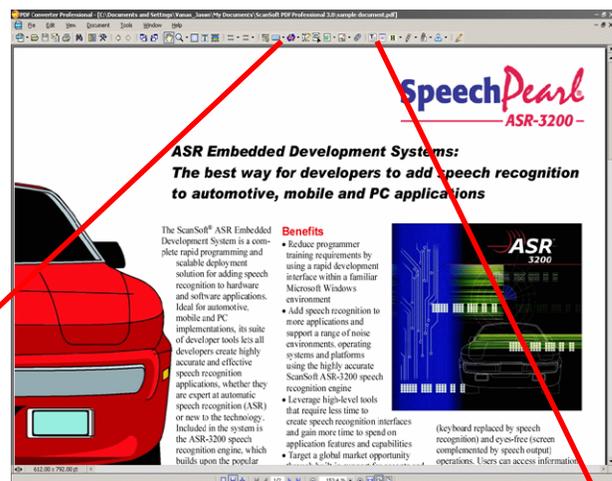
Creating Text Searchable PDF from the PaperPort Desktop

1. Select the file you want to convert with a click of the mouse on PaperPort desktop.
2. Select File from the Menu Bar and Save As from the drop down menu.
3. In the Save "FileName" As window, select the location where you want to save the text searchable PDF file, name the file, select "PDF Searchable Image" as the file type and then click on "Save".
4. PaperPort and OmniPage will then automatically convert your scanned image into a fully text searchable PDF file and place the file in your designated location.



PDF Editing

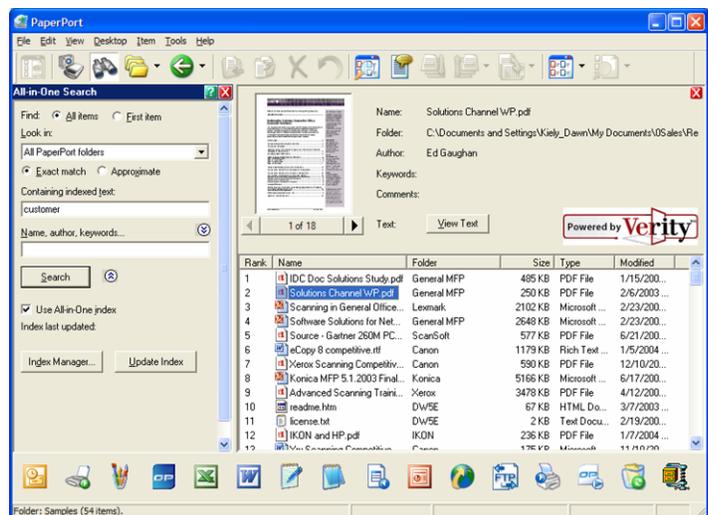
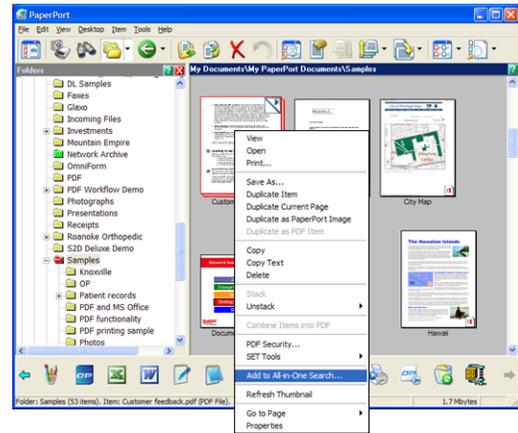
1. Go to Start > All Programs > ScanSoft PDF Converter Pro 3.
2. Click File > Open. Browse to the PDF that will be edited.. Click Open.
3. Use the tools in the Organizer Toolbar to edit the PDF file.
4. Click File > Save to save the changes to the PDF file.



Managing Documents at the Desktop

With PaperPort Professional 10, you can organize and index all of your scanned image files and text based documents. Using PaperPort's All-in-One Search tool, finding the file that you need is as simple as knowing a word or phrase from the file for which you are searching.

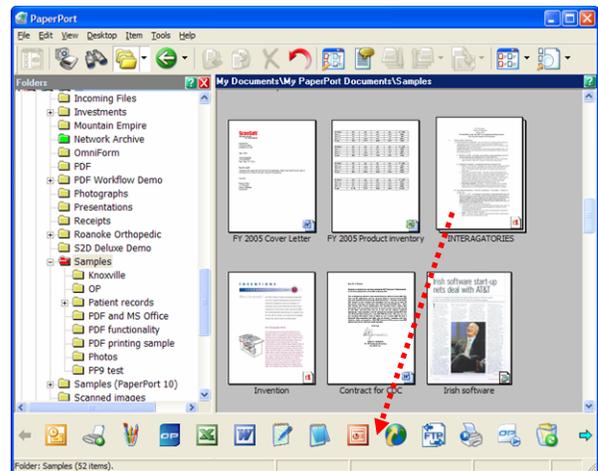
1. Select the scanned image file you want to add to your PaperPort document management system.
2. Right click on the mouse and select "Add to All-in-One Search" from the drop-down menu list.
3. PaperPort will automatically perform OCR on the text within your selected image file and add that text to the PaperPort All-in-One Search database.
4. Alternatively, on a regular basis, you can select Search from the PaperPort Command Bar click on the arrows to display the "Use All-in-One index" check box. Select that box and click on "Update Index". PaperPort will then index all of the image files and text-based files within folders mapped to your PaperPort desktop.
5. To find files in any folder (local or network) mapped to your PaperPort Desktop, you need only know a word or phrase contained within the file.
6. Click on the "Search" button on the PaperPort Command Bar to initiate a text sensitive or keyword search.
7. In the "Containing indexed text" field, type in the word or phrase from the file for which you are searching.
8. Ensure that the "Use All-in-One Index" and "Exact Match" options are selected. Then click on the "Search" button in the Search pane.
9. All-in-One Search will search all folders mapped to your desktop and return to you a list, ranked by relevance, of all files containing your search criteria.
10. Double click on the file from the search results list and you will be taken to the thumbnail view of that file on your PaperPort Desktop.



Linking to Additional Applications

Your PaperPort Desktop makes it easy for you to integrate scanned images into other applications on your workstation or the network.

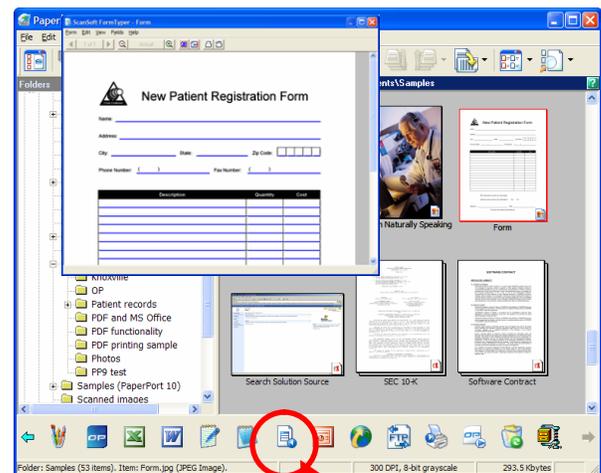
1. Simply select the scanned image that you want to work with and, using the mouse, drag and drop that scanned image on to the desired application icon on the Send To Bar.
2. The desired application will automatically launch with the scanned image integrated into that application's workflow.



Filling in Scanned Forms with Form Typer

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.

1. PaperPort Professional 10 includes a feature that enables you to fill data into blank scanned forms. Scan the blank form back to the PaperPort Desktop.
2. Drag the blank form to the FormTyper link on the SendTo Bar. FormTyper will detect where the underlines are on the form and underline them in blue. You can also add additional fields by selecting "Place Manually" from the Fields menu.
3. Click on one of the blue underlines and begin typing in text. To move to the next field, press the Tab key.
4. Save the form back to the PaperPort Desktop by going to "Save to PaperPort Desktop As" from the Form menu. Name the form and click on OK.
5. You will see that a filled in copy of your form is saved to the PaperPort Desktop.



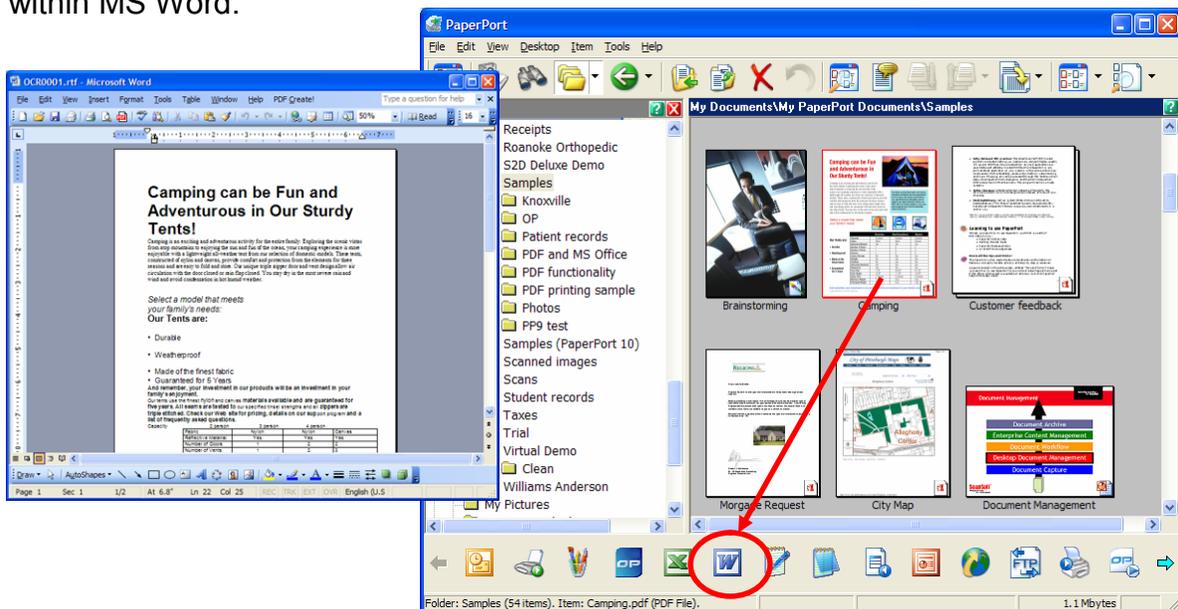
Repurposing Documents - OCR

Differences between Basic Text Capture and Document Conversion to MS Word:

- In both Basic Text Capture and Document Conversion, the text and paragraphs in the document will be retained.
- When using Basic Text Capture, all of the document's formatting and layout will be lost. The formatting and layout will be retained in Document Conversion.
- All embedded images will be removed when using Basic Text Capture. Embedded images will be retained with Document Conversion.
- All color text will be changed to black and white text when using Basic Text Capture. Color text will be retained when using Document Conversion.

Basic Text Capture from the Desktop

1. Directly from the PaperPort desktop you can capture and convert sections of scanned images to fully editable basic text documents.
2. Select the image file you want to convert from the PaperPort desktop with a single mouse click.
3. Click on the MS Word icon on the PaperPort Send To Bar. MS Word will automatically launch and convert your image file into a basic text document within MS Word.

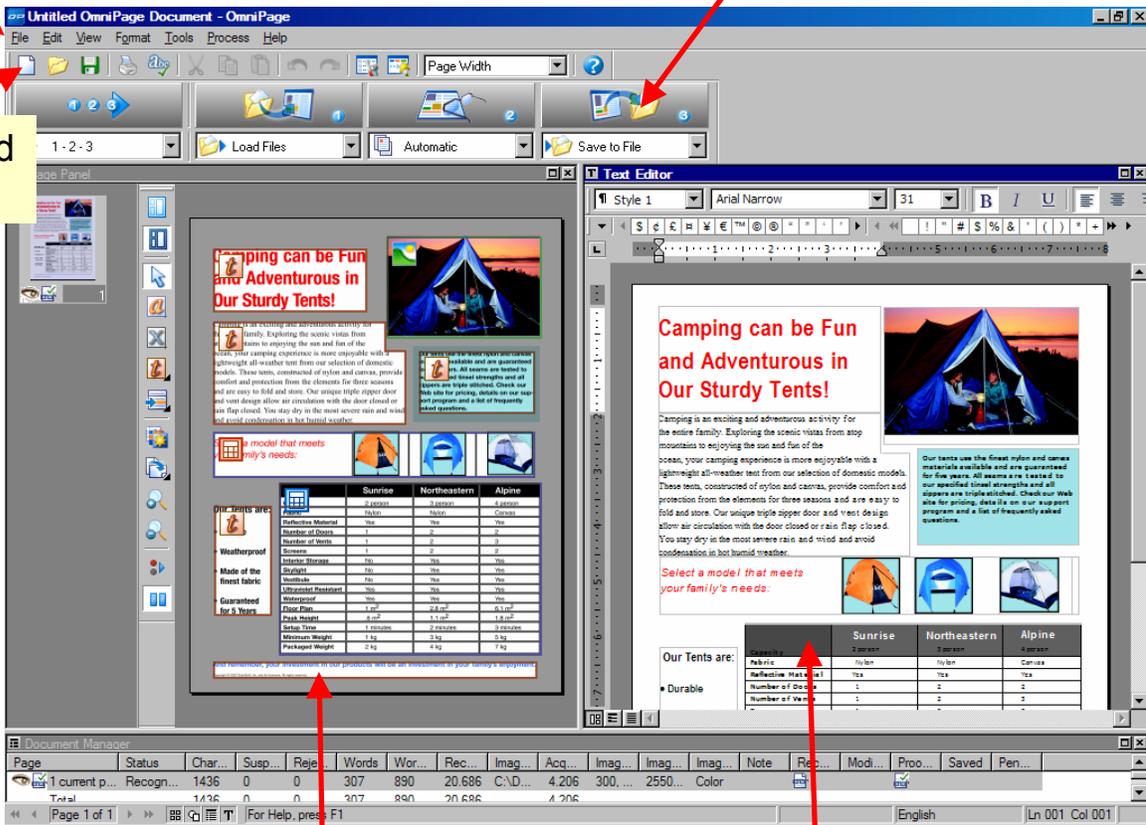


Introducing the OmniPage Desktop

Menu Bar

OmniPage
Toolbox

Standard
Toolbar



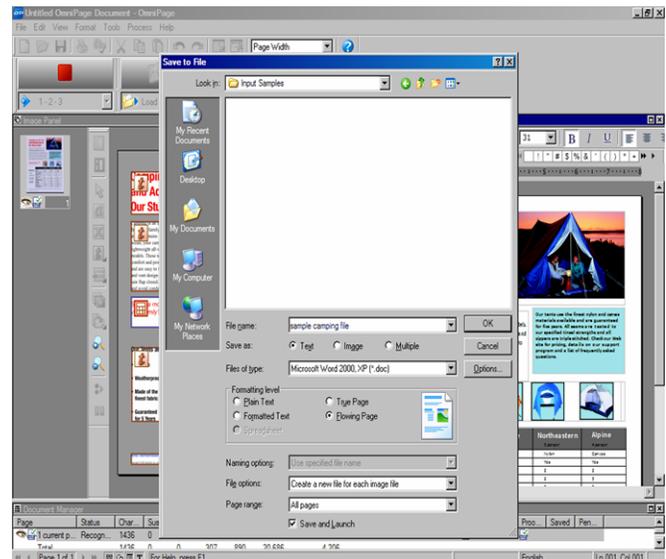
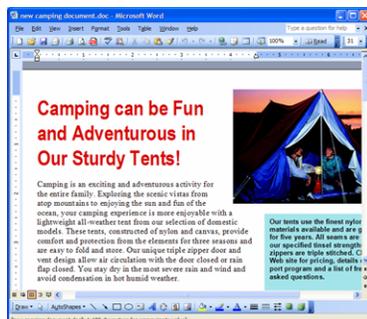
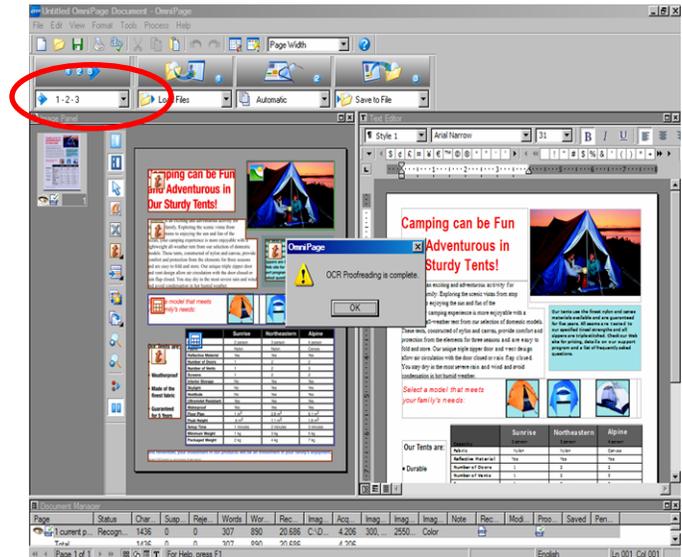
Original Image View

Text Editor View

Repurposing Documents - OCR

Document Conversion to MS Word

1. Select the image file you want to convert from the PaperPort desktop with a single mouse click.
2. Click on the OmniPage Pro 15 icon on the PaperPort Send To Bar. OmniPage Pro will automatically launch and load your image file into the application.
3. Select the 1-2-3 button from the OmniPage Toolbox.
4. Select Finish Processing Existing Pages.
5. OmniPage will now perform OCR on your image file and convert the scanned image into editable text.
6. Use the OCR Proofreader to correct any words that OmniPage is not sure that it recognized correctly. Select OK when Proofreading is complete.
7. Select the Look In location, File Name and Files of type (MS Word) from the Save As window. Ensure that the Save and Launch radio button is also checked.
8. OmniPage will save and automatically launch your file as a new MS Word document.





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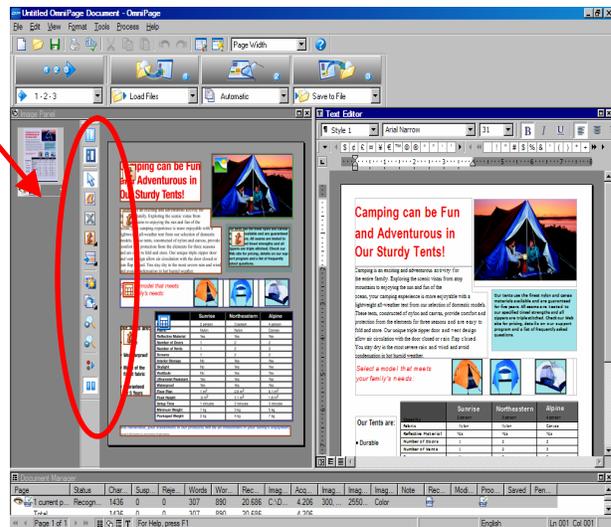
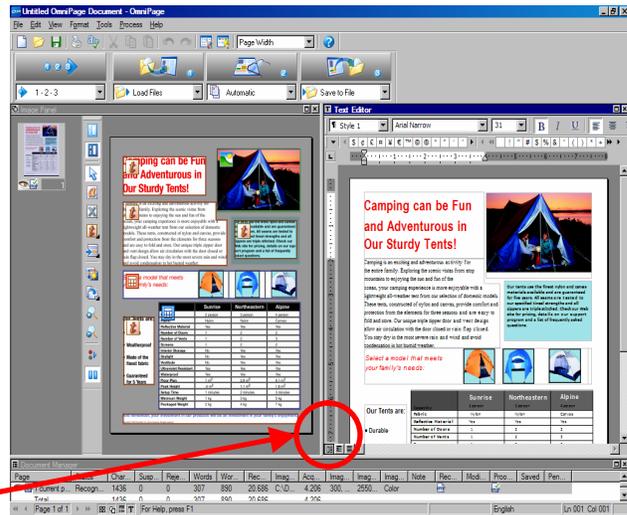
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Repurposing Documents – Advanced OCR

Manual Zoning for Complex Documents

OmniPage has additional options that allow improved recognition for complex documents.

1. Select the image file you want to convert from the PaperPort desktop with a single mouse click.
2. Click on the OmniPage Pro 15 icon on the PaperPort Send To Bar. OmniPage Pro will automatically launch and load your image file into the application.
3. Click on the 2-Automatic button in the OmniPage Toolbox. OmniPage will automatically zone the document and recognize it.
4. Verify that the True Page formatting button is selected in the Text Editor.
5. If OmniPage did not properly recognize some parts of the document, use the tools in the Image Panel to adjust the size or change the type of Text, Graphics, and Table zones.
6. When you have finished modifying the zones, click on the 2-Automatic button to re-recognize the document.
7. Select “Yes” to re-recognize the document.
8. Click on the 3-Save to File button in the OmniPage Toolbox.
9. Select the Look In location, File Name and Files of type (MS Word) from the Save As window. Ensure that the Save and Launch radio button is also checked.
10. Click on “OK” to save the document and open it in MS Word.

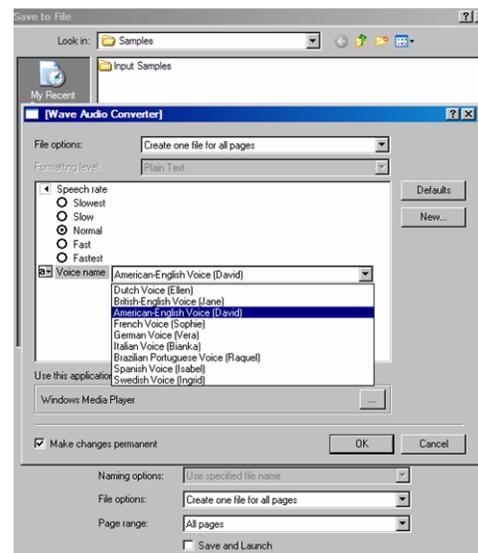
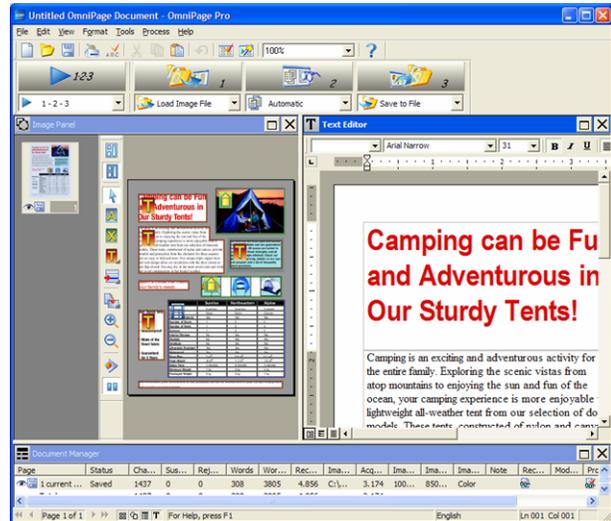


Repurposing Documents – Advanced OCR

Create Audio Documents from Paper and Digital Documents

OmniPage features RealSpeak™ Text-To-Speech for converting documents into audio files.

1. Select the image file you want to convert from the PaperPort desktop with a single mouse click.
2. Click on the OmniPage Pro 15 icon on the PaperPort Send To Bar. OmniPage Pro will automatically launch and load your image file into the application.
3. Click on the 2-Automatic button in the OmniPage Toolbox. OmniPage will automatically zone the document and recognize it.
4. Click on the 3-Save to File button in the OmniPage Toolbox.
5. Select “Wave Audio Converter” as the output format under Files of Type.
6. Click the Options button to specify the speed and voice to be used for creating the audio file. Please note that selecting a voice using a language other than that of the original document will not cause translation of the file to occur. The audio created by mixing the text and the voice languages would sound like gibberish to a native speaker of the voice language.
7. Select the Look In location and File Name from the Save As window. Ensure that the Save and Launch radio button is also checked.
8. Click on “OK” to save the document and open it in your default WAV player.



Repurposing Documents – Advanced OCR

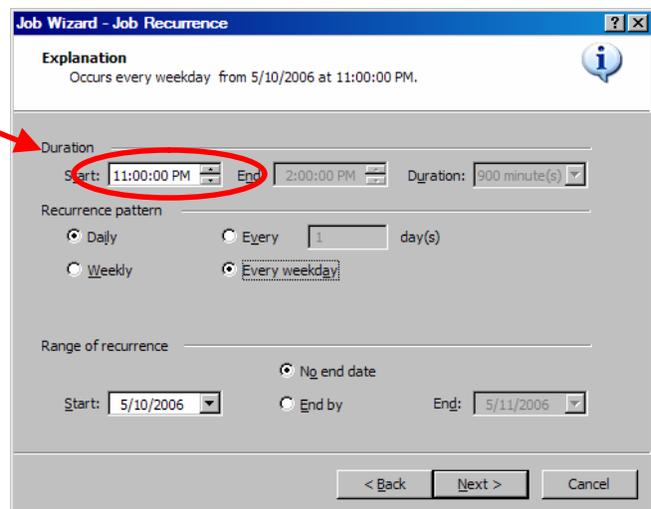
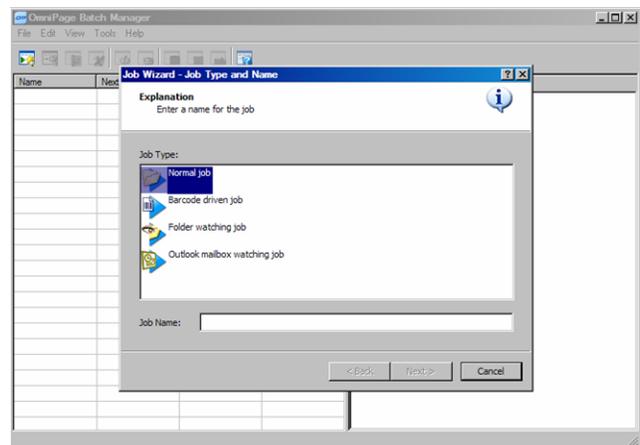
OCR Batch Processing

OmniPage Pro 15 includes a full batch manager for automated processing of files. One of the most common processes is detailed below.

Batch Conversion to Text Searchable PDF

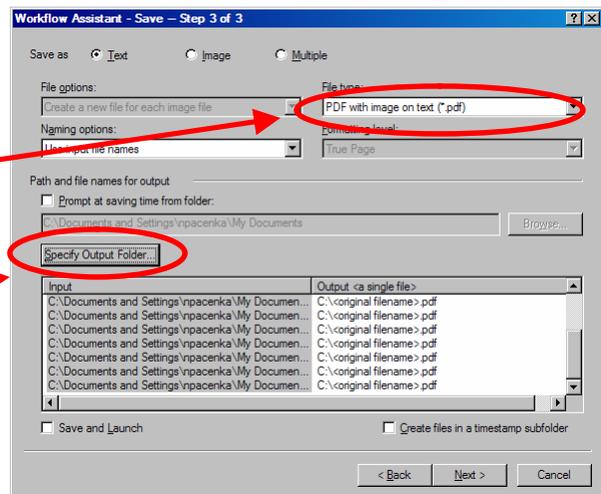
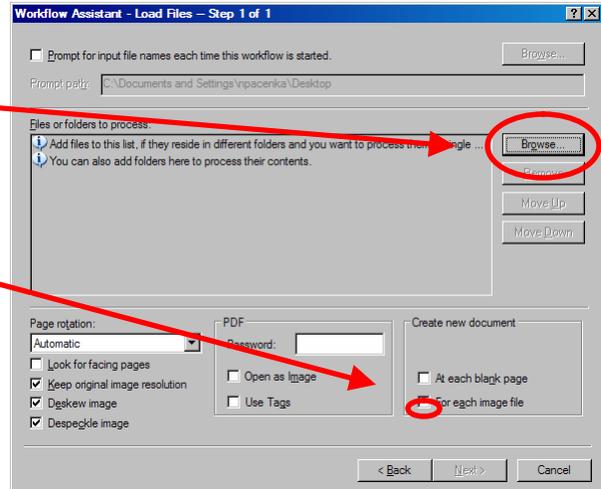
Using the Xerox WorkCentre Pro and OmniPage Pro 15, you can scan multiple documents into a network folder and then schedule OmniPage to convert all these scanned images to fully text searchable PDF files automatically at a pre-determined point in time.

1. Go to Start > All Programs > ScanSoft OmniPage 15.0 > OmniPage Batch Manager.
2. The Batch Manager tool will launch. Go to File > Create Job. From the Job Wizard window, click on “Normal Job”, name the job, and click on “Next”.
3. On the Start & Stop window, select “Recurrent...” in the Start Time drop down menu, and check the “Delete Input Files” checkbox. Click Next.
4. On the Job Recurrence window, select the Start Time and your preferred Recurrence Pattern. Click Next.
5. Select “Fresh Start”. Click Next.
6. There are a number of options available for the input files. In most cases, these files will have been scanned to a local or a network folder. In that case, select “Load Files”. Otherwise, choose the appropriate input location for your files. Click Next.



Repurposing Documents – Advanced OCR (con't)

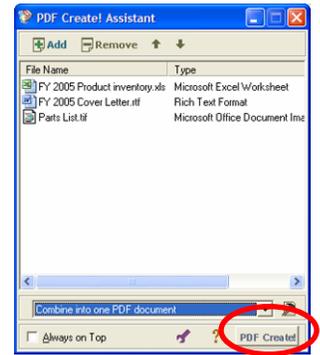
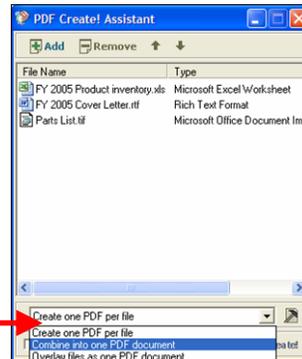
7. Click the Browse button, then click Advanced. Browse to the folder where the files are located. Click the Add Folders button, then OK.
8. In the “Create New Document” section, check “For Each Image File”. Click Next.
9. Select “Recognize Images”. Click Next.
10. Set the appropriate languages and dictionaries for the documents to be processed. Click Next.
11. In this step, the save location is selected. Choose the appropriate location for the files. The most common option is to select “Save”. Click Next.
12. From the File Type menu, select “PDF with Image on Text”. For naming options, select “Use input file names”. Select the entire list under the Input column at the base of the window and click the “Specify Output Folder” button. Browse to the appropriate folder and click OK. Click Next.
13. Select “Finish Workflow”. Click Finish.



PDF Batch Conversion

Batch conversion to PDF

1. Open the PDF Create! Assistant by going to Start > All Programs > ScanSoft PDF Create! 2.0 > PDF Create! Assistant.
2. Drag and drop documents and images into the PDF Create! Assistant window.
3. From the drop-down menu, select to “Create One PDF per file” or to “Combine into one PDF document”.
4. Click on the “PDF Create” button and you will be prompted to select where you want your PDF files saved.



Paper to Digital Forms Conversion

1. Go to Start > All Programs > ScanSoft PDF Converter Pro 3.
2. Click File > Open. Browse to the PDF form that will be filled in. Click Open
3. Once the form is open in PDF Converter Professional, click on the PDF icon in the top command bar. Choose “Auto Form Typer” from the list.
4. The fields will automatically be recognized and named on the open PDF form.
5. To alter the names or any of the other properties of the fields on the PDF form, right-click on the field and select Properties from the menu.
6. Once the form is customized, click the Hand icon in the Command Bar to begin filling out the form.

