Scan to PC Desktop
Professional v9
Orientation Guide

Personalize your Xerox network scanning and your PDF workflow

Information about this Orientation Guide

The purpose of the Scan to PC Desktop Professional v9 Customer Orientation Guide is to provide Xerox Customers with information about how they can use the Scan to PC Desktop Professional v9 software to make themselves more productive with the documents that they have scanned from their Xerox device and with all of their digital documents on their PC. This training is focused on providing information about key features of this software that business users most often use to make them more productive. It does not go over every item in every drop-down menu, but focuses on business workflows and practices that you need to be productive with the documents in your office.

This training is not organized by product, but instead it is divided into topics. To clarify which product you are working with in each topic, we have included product logos showing the specific products that are used in that particular topic.

On the Table of Contents Page, the following symbols are used to provide more information about some topics:

† Topics that are new or enhanced in Scan to PC Desktop Professional v9

* Topics in the "Advanced Topics" section that are also included in the Customer Orientation Guide Training CD

End User Training Webinar Agenda

- **Introducing Scan to PC Desktop Professional v9**

- **Software Features**
  - Scanning Documents to your Desktop PC
  - Working with Scanned and Digital Documents on the PaperPort Desktop
  - Working with PDF Files
  - Digital Archiving with Text Searchable PDF Files
  - Working with Forms

- **Additional Training and Support Resources**

Table of Contents

Notes: *Advanced Topics will not be covered in Nuance's web-based Scan to PC Desktop End User Training Sessions unless specifically requested two days in advance of the scheduled training.*

*All topics in the Software Features section are also included in the Customer Orientation Guide Training CD. Additionally topics in the "Advanced Topics" section that have a * are also included in the Customer Orientation Guide Training CD.*

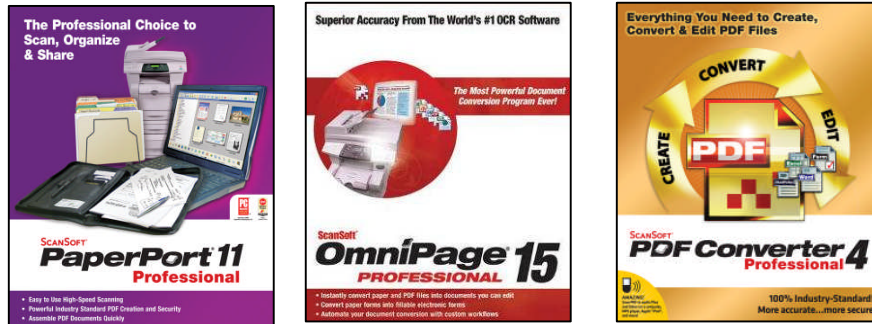† Topics that are new or enhanced in Scan to PC Desktop Professional v9

* Topics in the "Advanced Topics" section that are also included in the Customer Orientation Guide Training CD

Introducing Scan to PC Desktop Professional v9

# Introducing Scan to PC Desktop Professional v9


- A complete network to desktop office scanning solution
- Automatic device to desktop scanned image file delivery
- Secure PDF workflow from start to finish of all scanning applications
- Professional OCR for digital archiving, document and forms conversion

Each program is installed on your desktop PC. This software does not run on the server.
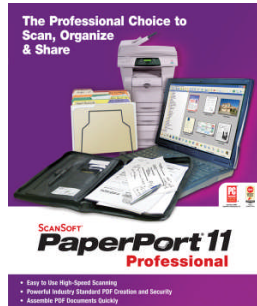
- ➲ Quickly turn paper into organized digital documents
- ➲ Provide a better way to organize documents on your desktop
- ➲ Easily create secure PDFs from Windows applications
- ➲ Simply assemble scanned and digital documents
- ➲ Ensure you never misplace a document or PDF file again
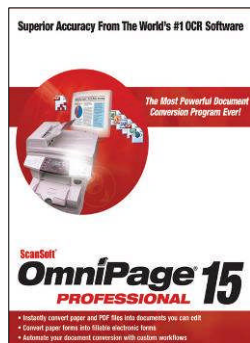
- ➲ Instantly convert paper into useable Microsoft Office documents
- ➲ Turn PDF files into editable documents while retaining their layout
- ➲ Create unlimited searchable PDF files for digital archives
- ➲ Paper to digital forms conversion with Logical Forms Recognition
- ➲ Automatically process scanned images from Xerox MFP

- ➲ Create industry-standard PDF instantly from any application
- ➲ Protect PDF documents with password and permission controls
- ➲ Paper to digital forms conversion to fill out and edit PDF forms
- ➲ Directly edit within PDF files including text, comments and markups
- ➲ Precise Conversion of PDF into Word, Excel and WordPerfect

- ➲ Automated delivery of scanned images direct to the end user desktop with Image Retriever Professional
- ➲ Monitoring & Automated Delivery from Network Folders or E Mail Inbox

Software Features

Scanning Documents to your Desktop PC

Scanning at the Xerox MFP

Your Xerox Analyst has already trained you on how to scan a document using the steps listed below.

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.

To scan a document back to your PC:

1. Load the paper into the document feeder on the Xerox MFP.

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.
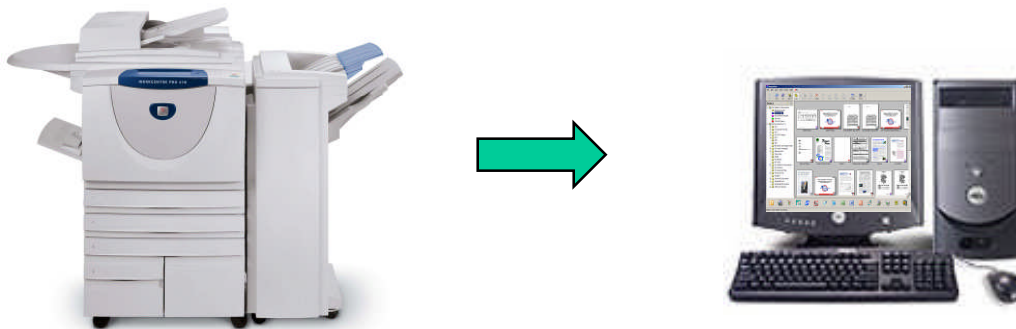
Restarting Image Retriever ImageRetriever™

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.

Image Retriever Settings are usually configured by your IT Department. More information about Image Retriever Settings is in the "Advanced Topics" section of this Orientation Guide.
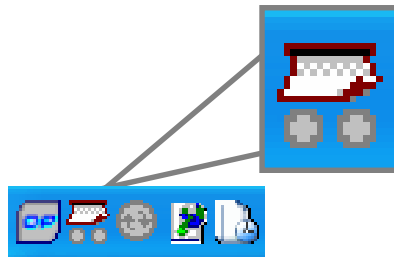
If your PC loses its connection to the network, you may have to restart Image Retriever. To restart Image Retriever:

1.   Go to Start > All Programs > ScanSoft PaperPort Pro 11 > Image Retriever.

2.   The Image Retriever icon will appear in System Tray in the lower right corner of your Windows Desktop near the clock.

Working with Scanned and Digital Documents on the PaperPort Desktop

PaperPort Desktop

After scanning a document from the Xerox device, when you return to your PC, PaperPort will be open, and you will see your scanned image on the PaperPort Desktop with a red box around it.
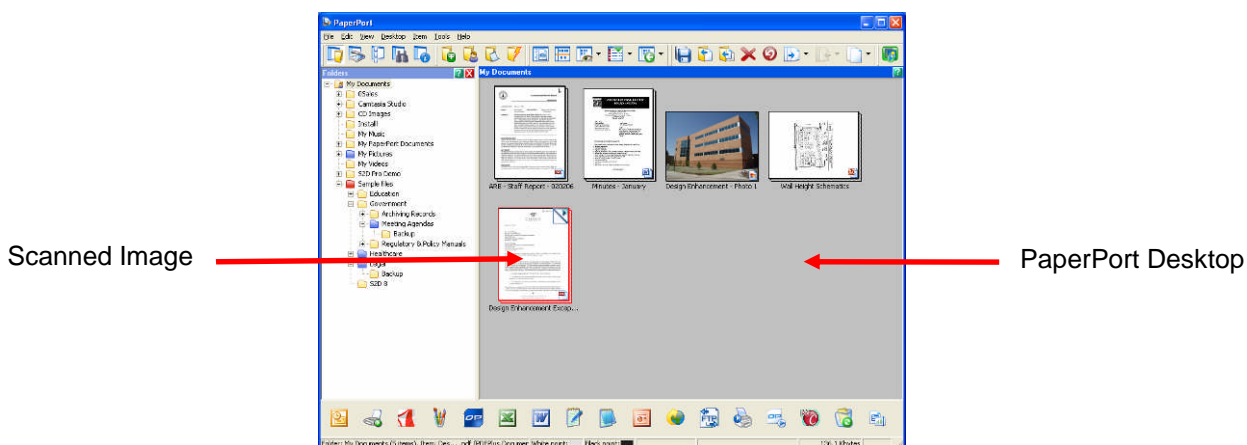
Scanned Image →   ← PaperPort Desktop

PaperPort Folder View

PaperPort automatically displays your My Documents folder and all of that folders sub-folders in PaperPort's Folder View. This is the same My Documents folder structure that you see through Windows Explorer.

When you click on a folder in PaperPort's Folder View, the documents and images in this folder are displayed on the PaperPort Desktop as Thumbnails. These Thumbnails show you a view of what the document actually looks like, making it very easy for you to visually manage all of the documents on your PC, including Microsoft Office, PDF, and images. Icons showing you the file type are visible in the lower right corner of the Thumbnail.

Windows Explorer

Folder View →

← Thumbnails
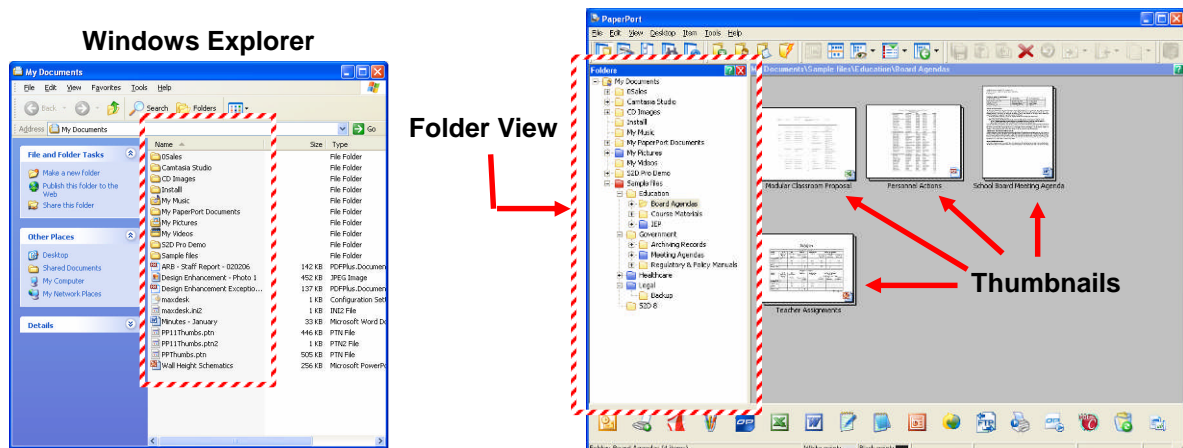
Adding Additional Folders to Folder View

By default, the My Documents folder is added to the PaperPort's Folder View. To add additional folders to Folder View:

1. Click on the "Folder Manager" button.

2. Click on "Add".

3. Browse to the folder that you want to add (local or network) and click on "OK".

4. Click on "Close" to close the Folder Manager window.

5. Your newly added folder will appear at the bottom of Folder View.
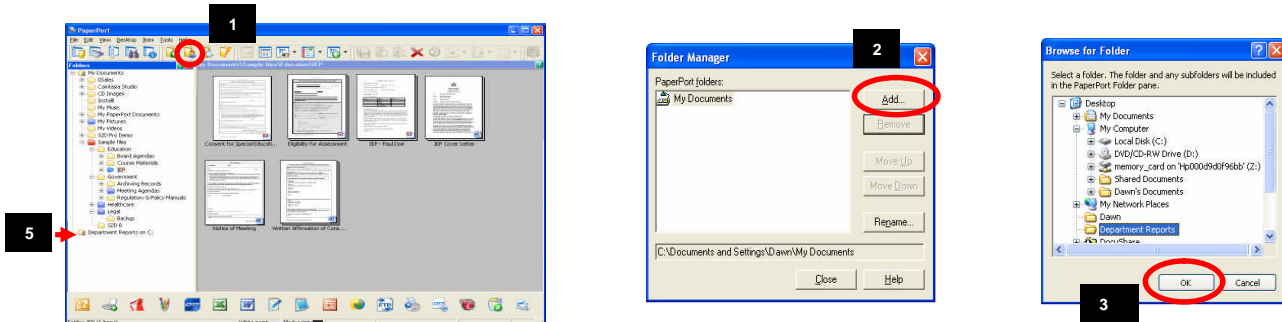

Folder Notes †

Folder Notes allow you to automatically specify metadata (keywords, author, etc.) to all new PDF files that arrive via Image Retriever into a particular folder in PaperPort's Folder View. If a PDF item is put into a folder any other way, Folder Notes will note be applied to it. To add Folder Notes to a folder:

1. In PaperPort's Folder View, right click on a Folder and select "Folder Notes".

2. Add text to the Subject, Author, and/or Keywords fields.

3. Click on "OK" to close the "Folder Notes" window.

4. Now when Image Retriever delivers PDF files to that folder, the Subject, Author, and/or Keywords will be added to that PDF file automatically.
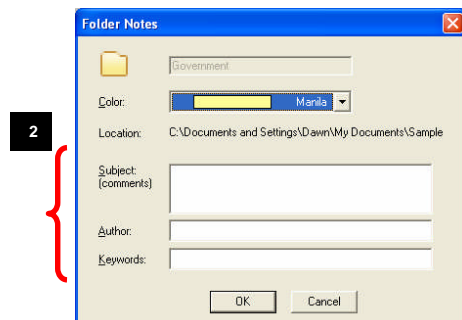
† Topics that are new or enhanced in Scan to PC Desktop Professional v9

Moving Documents into Work Processes

Moving a Document into a Different Folder

To move a document into a different folder, simply drag and drop it from the PaperPort Desktop into a different folder.

PaperPort SendTo Bar - Information

The PaperPort SendTo Bar allows you to quickly and easily move documents from the PaperPort Desktop into other applications on your PC.
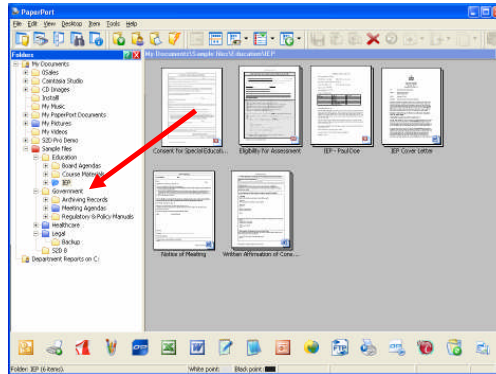
When PaperPort is installed, it automatically detects which programs that you have on your PC and automatically adds text and imaging programs to the SendTo Bar. For example if you have Corel Word Perfect installed on your PC rather than Microsoft Word, the PaperPort will create a link to Word Perfect, but will not create a link to Word.

PaperPort SendTo Bar – Email Links

The PaperPort SendTo Bar allows you to quickly and easily email documents from the PaperPort Desktop using several popular email programs, such as Microsoft Outlook and Lotus Notes by following these steps:

1. Drag a document from the PaperPort Desktop down to the email link.
2. A new email message will appear with the document already attached.
3. Simply type in the email address and click on "Send".
4. You have now sent the document as an email attachment.
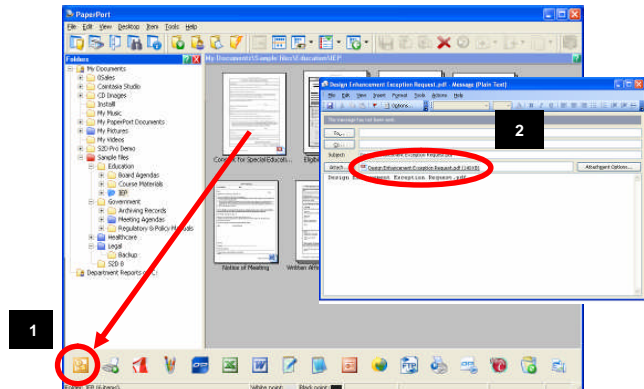
Working with PDF Files

Business Document File Types

Today, most offices have 75% - 90% of their information stored in one of these three document formats: Paper, PDF, and Microsoft Office. This training session will help you learn how to move information between these three document formats.

Business users have three needs for PDF: **Create**, **Edit**, and **Secure** PDF files. This training session will show you how to meet all of these needs, without having to purchase the full Adobe Acrobat software.
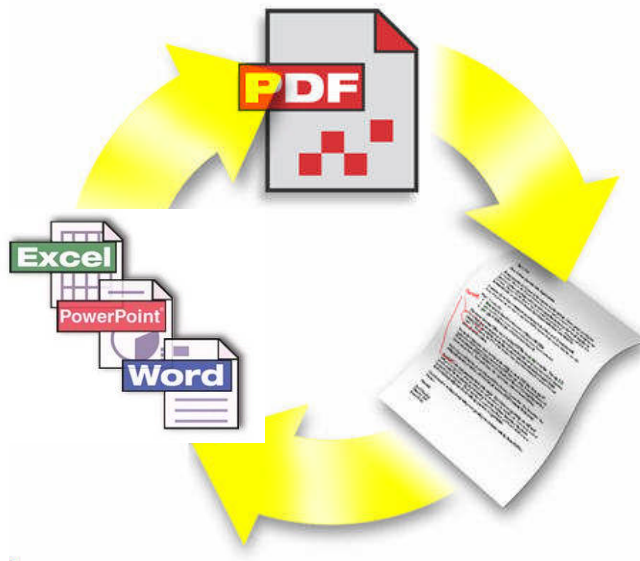
Flavors of PDF Files

There are three main types or "flavors" of PDF files that can be created using Scan to PC Desktop Professional v9 with a Xerox MFP:

- **Image Only PDF**
  The PDF file looks exactly like the original paper document. The PDF file is only viewable and is not searchable. These PDF files can be cleaned up and annotated in PaperPort (additional information is available on Pages 20 – 21).

  It can be created by scanning as a PDF from a Xerox MFP.

- **Text Searchable PDF (PDF with image on text)**
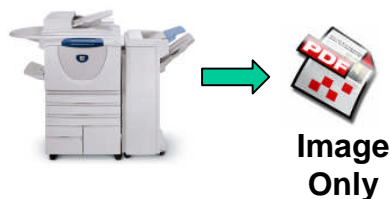 This is a multi-layered document. The "top" layer is an image layer and the "bottom" layer is a layer of text. The layer of text is what makes this PDF searchable. When this file is viewed in the free Adobe Reader, you are looking at the image layer, so the PDF looks exactly like the original paper document.

  PDFs that are scanned from a Xerox device are Image Only PDFs and are not yet searchable. A Text Searchable PDF can be created on the PaperPort Desktop by right clicking on an Image Only PDF and selecting Save As > PDF Searchable Image. Another option is to OCR (Optical Character Recognition) a document using OmniPage and select "PDF with image on text" as the file type.

  Text Searchable PDF is the best file format for digital archiving because every word inside the document is searchable. They can be searched upon using almost any document management software, including DocuShare, SharePoint, iManage, and Documentum. Also, they can be searched upon using the Search feature in Windows Explorer.
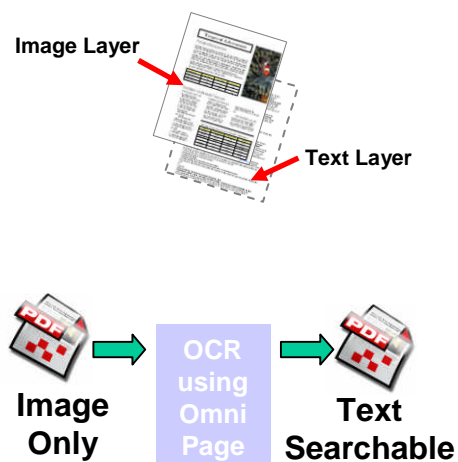
- **PDF Normal**
  Most often, it is created from a PDF that originated as a text document. This file is viewable and searchable. It can be edited in PDF Converter Professional and Adobe Acrobat.

  It can be created by printing from a text document (Word, Excel, Word Perfect, etc.) using the ScanSoft PDF Create printer driver.
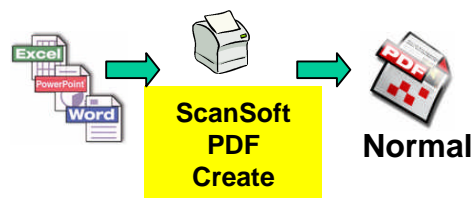
Creating PDF Files

There are many ways to create PDF files using Scan to PC Desktop Professional v9 with a Xerox MFP. Instructions for some of these ways are below:

• Scan from a Xerox MFP

> Please refer to Page 10 for instructions for how to scan a PDF file to your desktop.

• Combine Different File Types into one PDF File

1. On the PaperPort Desktop, hold down the Ctrl key and click on the documents that you want to combine together. These could be documents of 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. PaperPort will make a PDF file copy of each file and will automatically stack the PDF file copies together into a PDF file on the PaperPort Desktop.
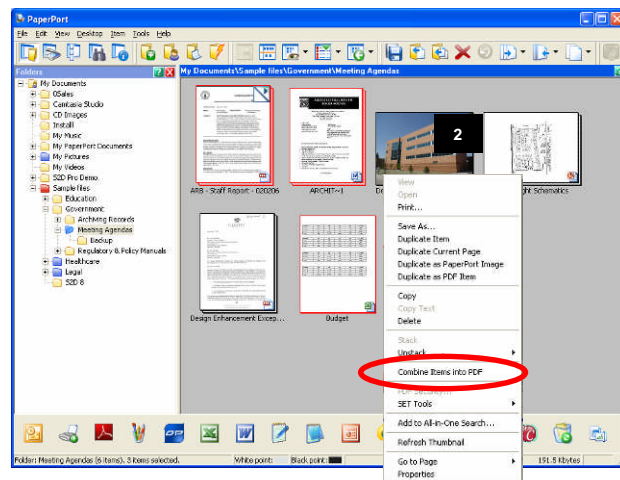
• Basic PDF file Creation from Inside of MS Word and MS Excel

PDF Converter Professional 4 adds shortcut buttons to the toolbars in MS Word and MS Excel.

1. From inside of Word, click on the button in the toolbar.

2. Browse to the location of where you want to save your PDF file.

3. Click on "Save" and your PDF file will be saved to the location that you selected.

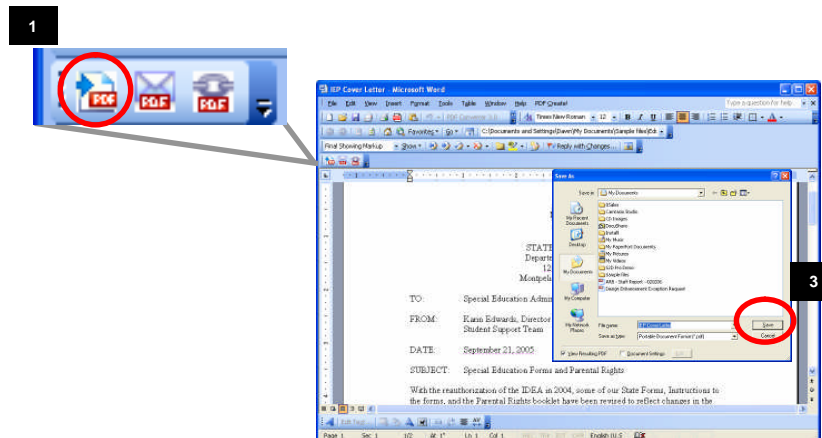• **Advanced PDF Creation from any Application**   ScanSoft **PDF Converter 4** Professional

   PDF Converter Professional 4 includes the ScanSoft PDF Create! print driver that enables you to print a PDF file from any application.

1. From within the desired application, go to File > Print and then select "ScanSoft PDF Create!" as your printer.

2. Select OK and you will be prompted to select where you want your PDF files saved.

3. You can also click on the "Properties" button and click on the "PDF Settings" tab to access more advanced features, such as version, compression level, and security.

4. By clicking on the "Advanced" button next to the "Security" drop-down menu, you can select your desired security options so that you can automatically print a secure PDF file. More information about PDF Security is on Page 23.
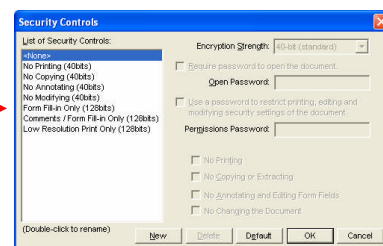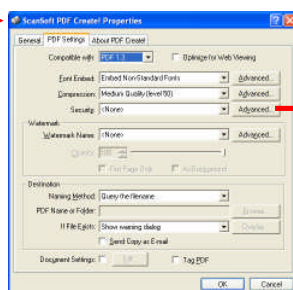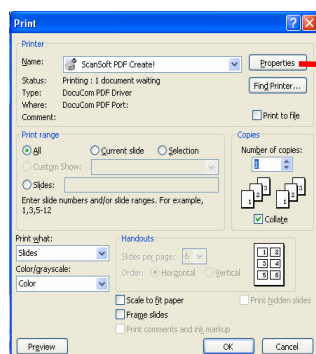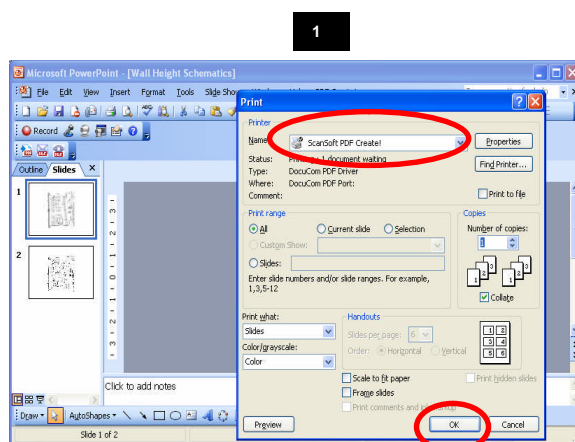
Editing PDF Files

• Rearrange and Add Pages to a PDF File

ScanSoft PaperPort 11 Professional

On the PaperPort Desktop, the Page Thumbnails pane displays the page thumbnails of a selected PDF file in Desktop View. Within Thumbnail View you can rearrange pages within a PDF files and add pages into the PDF.

1. On the PaperPort Desktop, click once on the PDF file to select it.

2. Go to View > Page Thumbnails. The left pane will change to the Thumbnail View and each page of the PDF file will be displayed.

3. Within Thumbnail View, use your mouse to drag and drop the pages to rearrange the pages in the PDF file.
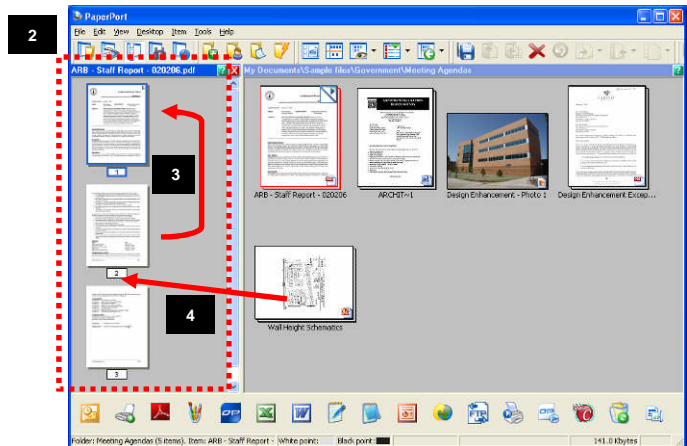
4. Also, you can drag documents in any format from the PaperPort Desktop into Thumbnail View. A PDF file copy of that document will be created and the newly created PDF file will be automatically inserted into the location in the PDF file that you selected.

• Stacking and Unstacking PDF files

ScanSoft PaperPort 11 Professional

You can combine, or stack, individual PDFs into multipage PDFs. PDF file thumbnails can be copied, stacked, and unstacked just as you would with physical paper documents

To stack, or combine, two PDF files one on top of the other to create a new document, you can either:

A. Select one PDF and then drag that image with the mouse on top of the other PDF file.

B. Select both images you want to combine by holding down the Ctrl key and using the mouse to click on each of the PDF files that you want to combine together. Then click on the "Stack" button on the Command Bar.

In both cases, the result will be a combined new PDF file with multiple pages.

To unstack pages in the PDF file, right click on the PDF file and select Unstack > All Pages or Current Page.
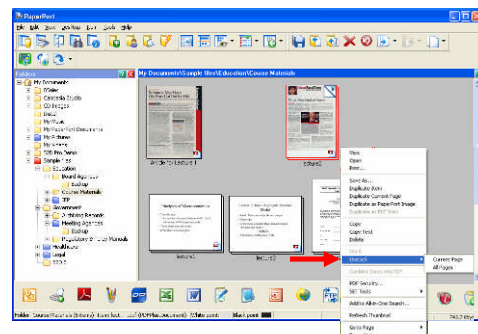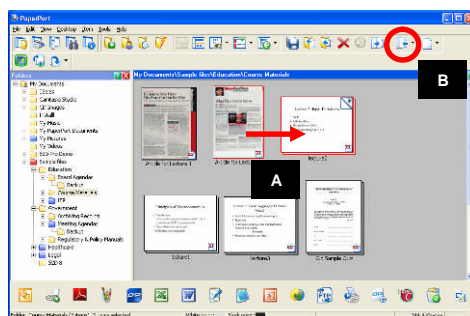
• **PDF Image Cleanup with PaperPort SET Tools**

PaperPort includes SET (Scanner Enhancement Technology) Tools which allow you to do some basic image cleanup of your scanned images and PDF files. PaperPort Professional 11 provides the ability for you to use the SET Tools on any PDF file. If you have a PDF where SET tools are not available, PaperPort will ask you if you want to automatically convert to a PDF that can be edited with the SET Tools.

To access the SET Tools to cleanup a PDF file:

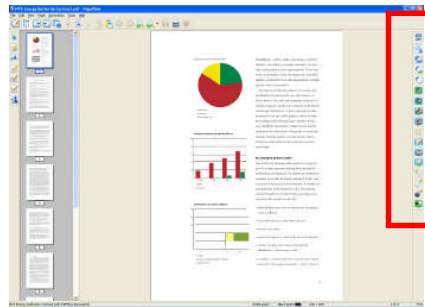1. On the PaperPort Desktop, right click on the PDF file and select "View" to open the PDF file in PaperPort's Page View.

2. Use the SET Tools on the right toolbar to cleanup your image.

Select Area – select an area of an item. You can then cut, copy, or paste that area.

Rotate Right – you can repeatedly rotate items 90 degrees.

Auto Straighten – automatically makes lines of text horizontal.

Straighten – manually straighten pictures and text pages.

Auto Enhance – performs automatic image improvement.

Enhance – offers variation of your image to choose from and lets you change brightness, contrast, tint, etc.

Sharpen – improves blurred areas or entire images.

Remove Red Eye – removes the "red eye" effect from a selected part of a photo.

Crop – deletes everything outside a rectangle that you draw on the image.

Erase – deletes unwanted parts of your image much like a rubber eraser.

Remove Stray Dots – removes stray dots or "speckles" from a page. This tool only works with black and white images.

Improve Lines – darkens lines and connects broken lines in a table or form. This makes lines appear darker and straighter. This tool only works with black and white images.

Erase edges – clear shadows and spots from page edges.

Set Black and White Points – lets you define the darkest and the lightest points for enhancement.

Apply current White and Black Points – once you have achieved the best white-black combination, click this tool to apply these values to the current page.

• Annotate PDF Files *ScanSoft* **PaperPort 11** **Professional**

PaperPort includes the ability to annotate or "mark-up" PDF files. These features work with any flavor of PDF file.

To access the Annotation Tools to mark-up a PDF file:

1. On the PaperPort Desktop, right click on the PDF file and select "View" to open the PDF file in PaperPort's Page View.

2. Use the Annotation Tools on the left toolbar to mark-up your image.
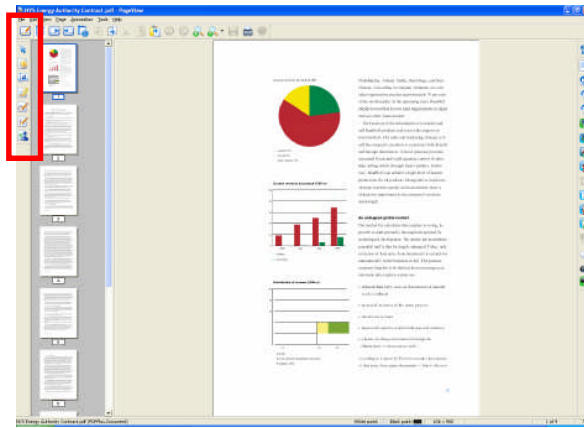
Select Annotation – Click to select, move, or resize annotations on a page.

Note – Creates a resizable note much like a sticky note you can write on and then stick on paper documents.

Text – Click to add a line of text with a transparent background.

Highlighter – Use to highlight any part of a page for emphasis, like the markings you make with a highlighter marker on paper.

Pencil – Use to draw any mark, shape, or line on a page.

Arrow or Line – Use to draw straight lines, with or without arrowheads, to point to specific items or text.

Stamp – Use to paste a graphic or bitmap file onto a page, much like you can stamp an image on a paper document. PaperPort comes with several samples you can use, or you can create and incorporate other bitmaps as annotations on your items.

**• Edit PDF Normal Files in PDF Converter Professional**

PDF Converter Professional 4 provides the ability to edit PDF Normal files. You can edit the text and images within these files.

Note: To edit other flavors of PDF files, see the section "Edit any PDF File Using OCR" on the bottom half of this page for information about using OCR to convert PDF files to text file types for editing.

To edit a PDF file using PDF Converter Professional:

1. Go to Start > All Programs > ScanSoft PDF Professional 4 > PDF Converter Professional to open the PDF Converter Professional application.

2. Go to File > Open.

3. Browse to the location of the PDF file that you want to edit and then click on "Open". The PDF file will be opened in PDF Converter Professional.

4. Click on the "Touchup Text Tool" or "Touchup Object Tool" button to select it.

5. Use your mouse to edit the text or image within the document.
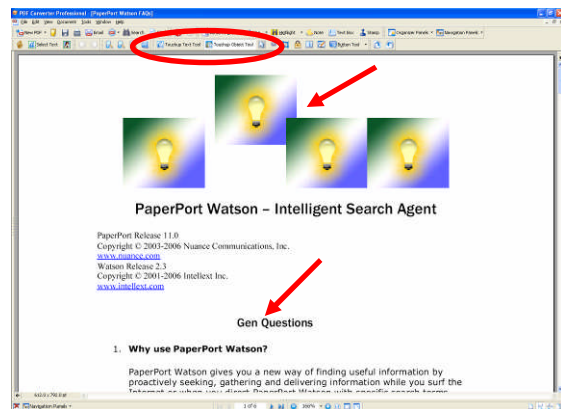
• Edit Any PDF File Using OCR

From the PaperPort Desktop, you can utilize the power of the OmniPage OCR program to convert any PDF file into an editable file format, such as Word, Excel, or Word Perfect.

OCR or Optical Character Recognition is the process of converting a scanned image or a PDF file into editable text, such as MS Word, MS Excel, or Word Perfect.

To OCR a PDF file and convert it to MS Word:

1. Drag the PDF file from the PaperPort Desktop down to the Word link. The Word link is automatically configured to use the OmniPage Professional OCR engine to do an automatic OCR.

2. The "OCR Proofreader" appears, allowing you to proofread the document before it is converted to Word. Correct any suspect words.

3. The document is automatically opened as a fully editable MS Word document.

Securing PDF Files

ScanSoft **PaperPort 11** **Professional**
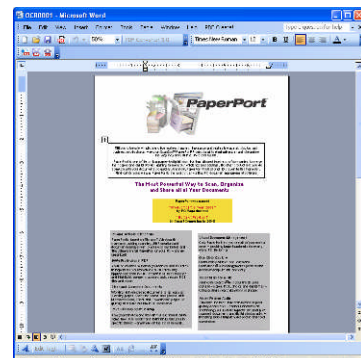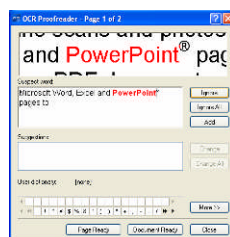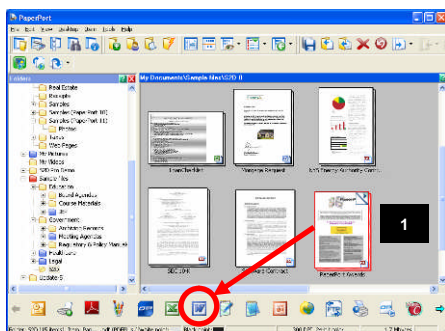
In PaperPort Professional, you can adjust the security level of your PDF files. There are two types of passwords in the program. The open password restricts document accessibility: you can only open it by supplying the password when prompted. The permissions password allows users to define how the document may be used. If it is not specified, further use of the file is possible without any restrictions.

To add PDF Security from the PaperPort Desktop:

1. 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.

> A. To require the user to enter a password before they can view the PDF in the free Adobe Reader or another PDF viewing or editing application, check the option for "Ask for a password…" and enter a password into the field below it.

> B. To disable the ability to print the PDF, check the option for "Use a permissions password…" and select "None" from the "Printing allowed" drop-down menu.

> C. To disable the ability to edit or change the PDF, check the option for "Use a permissions password…" and select "None" from the "Changes allowed" drop-down menu.

> D.Check or uncheck additional security options, depending on your needs for this document.

3. Click on "OK" to activate your security settings for the PDF file.
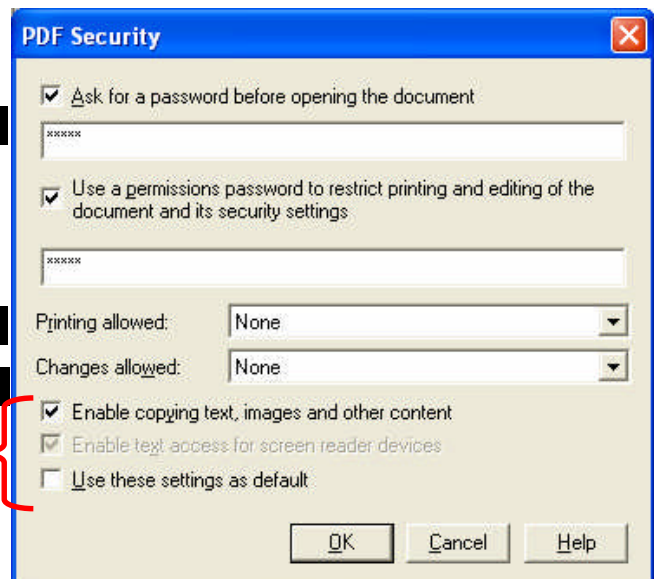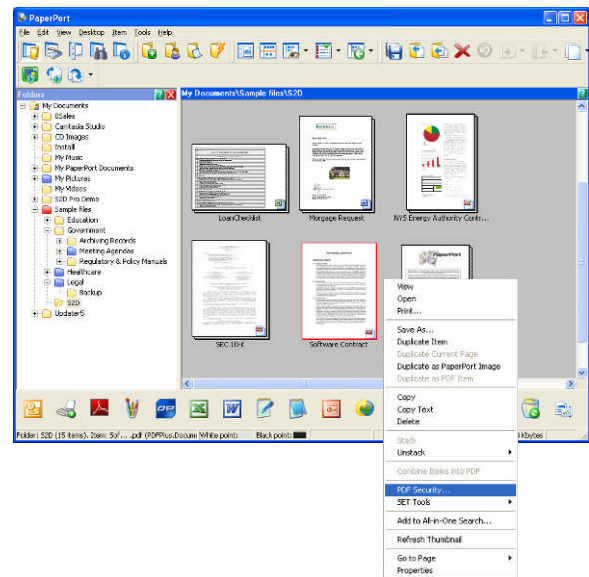
Digital Archiving with Text Searchable PDF Files

In the "Flavors of PDF" section of this document on Page 16, information was provided regarding why Text Searchable PDF is the best file format for digital archiving. The reason is that every word inside a Text Searchable PDF is searchable. These files are searchable, but you can still view the image layer of the PDF, which looks exactly like the original scanned image.

They can be searched upon using almost any document management software, including DocuShare, SharePoint, iManage, and Documentum. Also, they can be searched upon using the Search feature in Windows Explorer.

Scan to PC Desktop Professional provides several ways to create PDF files. For day-forward digital archiving, you can create Text Searchable PDF files directly on the PaperPort Desktop.

To create Text Searchable PDF files from the PaperPort Desktop:

1. Right click on the PDF file and select "Save As".

2. From the "Save as type" drop-down menu, select "PDF Searchable Image" as the file type.

3. Click on "Save". PaperPort automatically engages OmniPage in the background and OmniPage does a background OCR and makes every word inside of the PDF file searchable.

4. A Text Searchable PDF file copy of the document is saved onto the PaperPort Desktop.

5. You can then drag the Text Searchable PDF file down to a link to your Enterprise Content Management System, such as Xerox DocuShare and Microsoft SharePoint.

6. You can also download a PaperPort ODMA or PaperPort WebDav link that will allow you to drag documents from the PaperPort Desktop to one of these links and then upload that document into an Enterprise Content Management system that supports one of those standards. This link is available for download at http://www.nuance.com/paperport/links
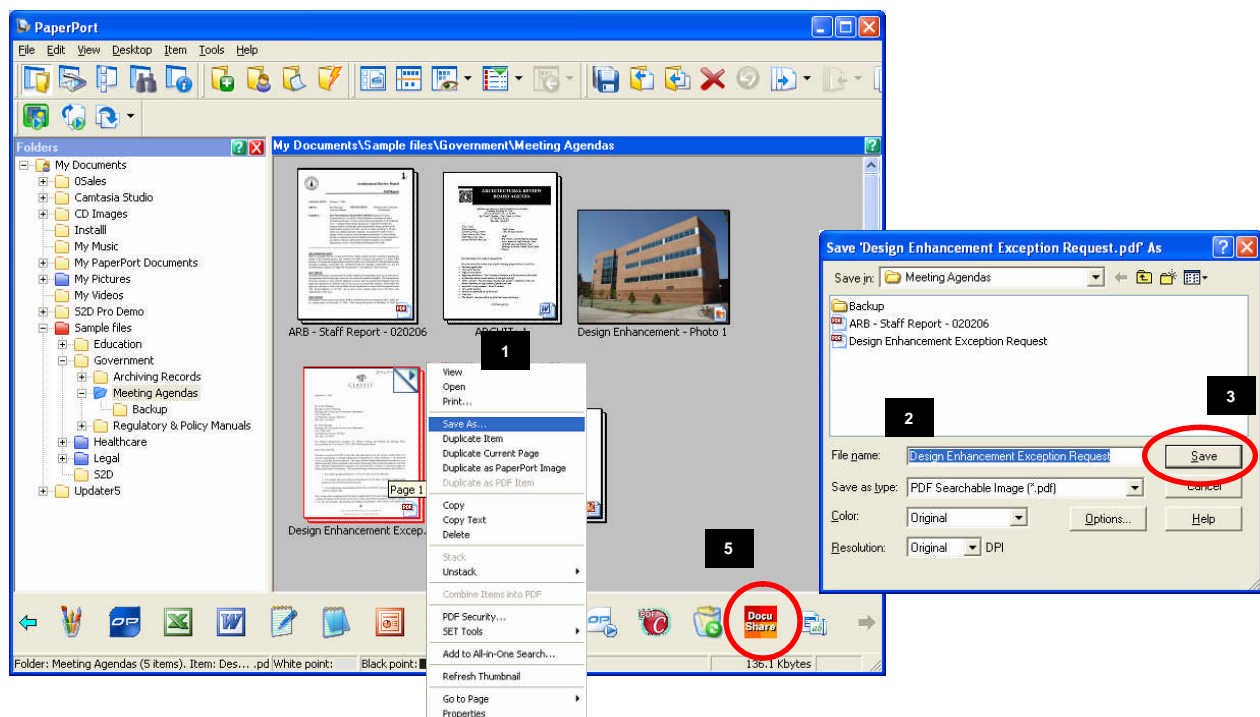
Working with Forms

Creating a Fillable PDF Form

PDF Converter Professional provides you with the ability to convert a blank scanned PDF form or a blank PDF form that has been downloaded from the Internet into a form that can be filled-in by anyone using the free Adobe Reader.

1. Open PDF Converter Professional by going to Start > All Programs > ScanSoft PDF Professional 4 > PDF Converter Professional.

2. Go to File > Open and browse where your PDF form is located.

3. Go to Tools > Form Typer. Form Typer will automatically detect which areas of the form are underlines, checkboxes, and radio buttons and it will make those sections fillable.

4. To save the fillable PDF form, go to File > Save As and specify the file name and location where you want to save the fillable PDF form and click on "Save". A fillable version of the form will be saved to the location that you specified.

5. Now, anyone can open this fillable PDF form using the free Adobe Reader and they can tab and type and fill-in the form.

6. Please note that if the person filling-in the form does not have a PDF printer driver, such as PDF Create! or Adobe Acrobat, installed on their PC, they will not be able to save the data that is typed into the form. The completed form would have to be printed to hard copy.

7. Because you have PDF Converter Professional installed on your PC, you will be able to save the data typed into the form by following these steps:

    A. From inside of Adobe Reader, go to File > Print.

    B. From the "Name" drop-down menu, select "ScanSoft PDF Create!" as the printer driver.

    C. Click on "OK".

    D. A PDF file copy of your completed form will be created.
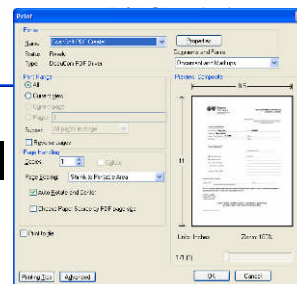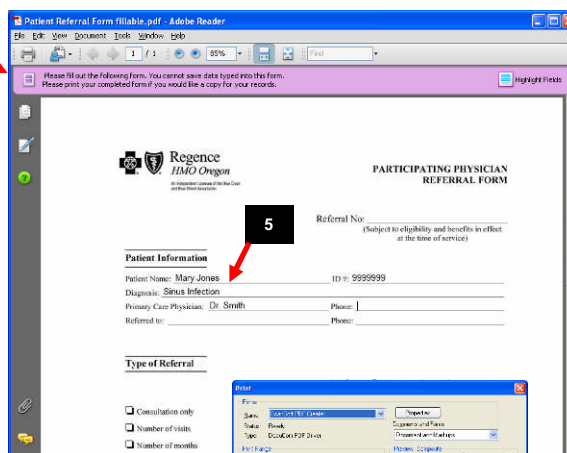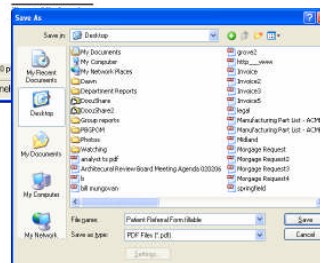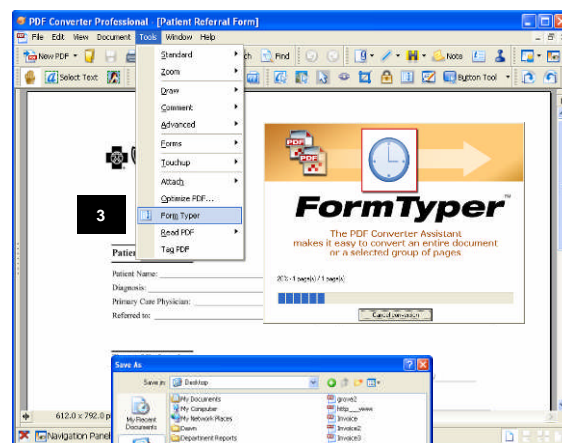
Additional Training and Support Resources

Customer Orientation Guide

After the training session, this Guide serves as a reference to remind you how to complete many common tasks using Scan to PC Desktop Professional.

Customer Orientation Guide Training CD

Based on the Customer Orientation Guide, this Training CD provides video demonstrations of all of the topics covered in the Webinar Training Session as well as some additional topics. For a complete list of topics covered in this Training CD, please refer to the Table of Contents at the beginning of this Customer Orientation Guide.

Help Files

Each Scan to PC Desktop software program contains extensive Help files that contain detailed explanations of all of the features and functions of each product. The Help files are accessible by opening the software program and then selecting the Help menu at the top of the window.

User Guides

Each Scan to PC Desktop software program has a user guide to provide assistance with some features of each program. These guides are available on the Scan to PC Desktop Professional v9 CD in the following locations:

PaperPort: PP11PRO/Docs/English/Getting Started Guide.pdf

OmniPage: OP15PRO/Guides/Guide ENG.pdf

PDF Converter: PDFCONV4PRO/Docs/PDF Pro 4 Quick Reference Guide-eng.pdf

Image Retriever: IR7PRO/Docs/ImageRetriever_Eng.pdf

Tech Support Knowledge Base

Find answers to many technical questions for all our software programs.

http://knowledgebase.nuance.com

Technical Support

Customer Support for the Scan to PC Desktop solution is provided directly by Xerox at no charge to you for the term of your Xerox Agreement.

For all technical support questions related to the Scan to PC Desktop solution, simply call the Xerox Welcome Centre at 1-800-822-2979. The automated voice will ask for a serial number. The Xerox Welcome Centre will then lead you to a live Xerox Customer Support Representative. You should instruct the Xerox Customer Support Representative that you have a question regarding the Scan to PC Desktop solution and that Xerox 2nd Level support is required. Xerox 1st Level is for general service calls to repair equipment.

Xerox 2nd Level and if required, Xerox 3rd Level Customer Support, will work to answer your questions regarding the Scan to PC Desktop solution. If the question cannot be answered or the issue is not resolved, Xerox Customer Support will contact Nuance 3rd Level Support for problem resolution.

You should not contact Nuance Customer Support directly to request assistance. All contact should remain direct through the Xerox Customer Support organization.

Advanced Training Topics

Please note that "Advanced Training Topics" are not included in the End User Training Webinar unless the Nuance Trainer is notified at least two days in advance of the scheduled training session. If you choose to include an Advanced Training Topic in your End User Training Webinar, you must choose which of the other topics in the End User Training Webinar are less important to your business and can be skipped in order to have enough time to cover all topics.

If you have participated in an End User Training Webinar for a previous version of Scan to PC Desktop, you may want to consider substituting some Advanced Training Topics for some of the topics in the End User Training Webinar that you are already familiar with.

Advanced OCR Topics

Manual Zoning for More Accurate OCR for Complex Documents

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

1. Drag the image or PDF file that you want to convert down to the OmniPage link on the PaperPort SendTo Bar. OmniPage Pro will automatically launch and load your image file into OmniPage.

2. Click on the 2-Automatic button in the OmniPage Toolbox. OmniPage will automatically zone the document and recognize it.

3. If OmniPage did not properly recognize some parts of the document, you can adjust the zones.

4. Use the tools in the Image Panel to adjust the size or change the type of Text, Graphics, Table, and Form zones.

5. When you have finished modifying the zones, click on the 2-Automatic button to re-recognize the document.

6. Select "Yes" to re-recognize the document.

7. Click on the 3-Save to File button in the OmniPage Toolbox.

8. From the "Save to File" window, select the "Look In" location, File Name, and Files of type (MS Word, or one of 30+ file formats) from the Save As window. Ensure that the "Save and Launch" box is also checked.

9. Click on "OK" to save the document and open it in MS Word.
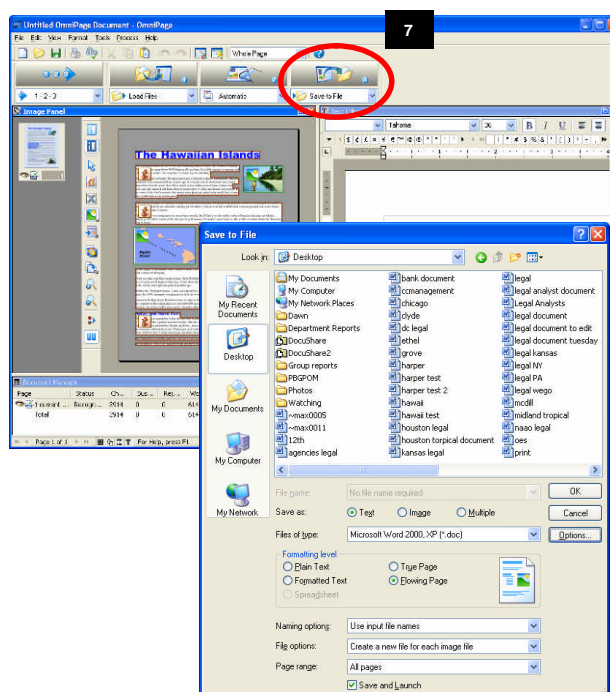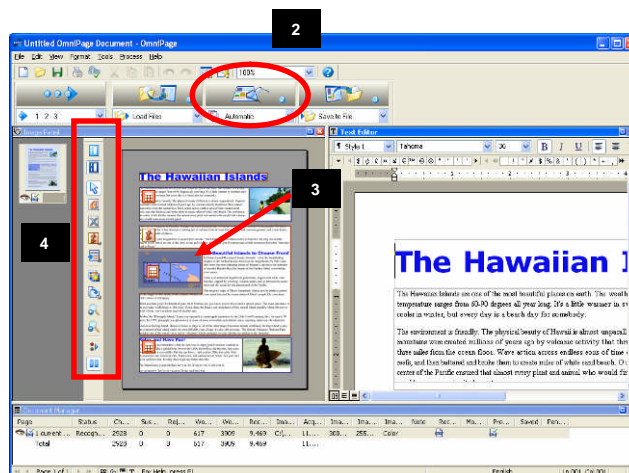
Automatic OCR – OmniPage Batch Manager

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 MFP 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.
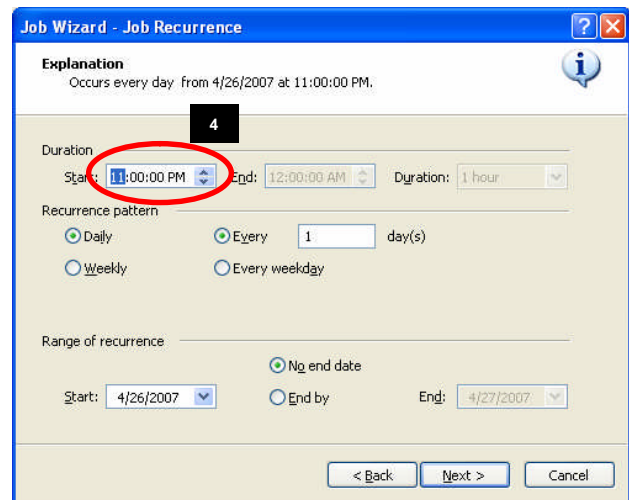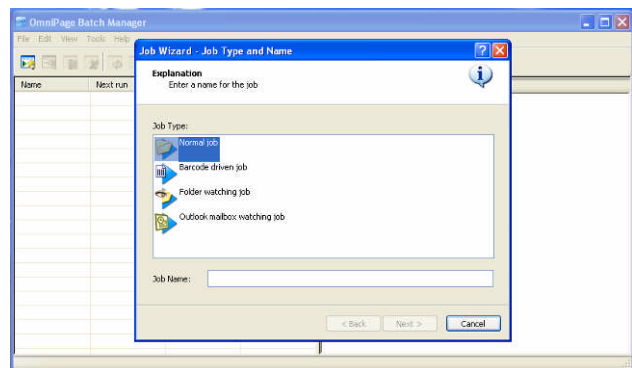
7. Click on the Browse button, then click Advanced. Browse to the folder where the files are located. Click the Add Folders button, then OK.

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". Form 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.
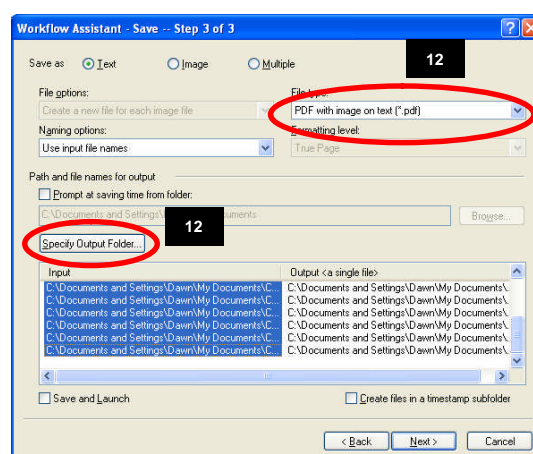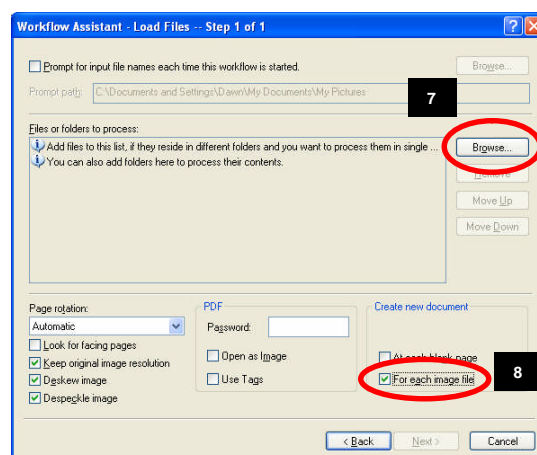
Creating Audio Documents from Paper and Digital Documents

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 and drag it down to the OmniPage Pro 15 icon on the PaperPort SendTo Bar. OmniPage Pro will automatically launch and load your image file into the application.

2. Click on the 2-Automatic button in the Omnipage Toolbox. OmniPage will automatically zone the document and recognize it.

3. Select "Wave Audio Converter" as the output format under Files of Type.

4. 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 creating by mixing the text and the voice languages would sound like gibberish to a native speaker of the voice language.

5. Select the Look In location and File Name from the Save As window. Ensure that the Save and Launch radio button is also checked.

6. Click on "OK" to save the document and open it in your default WAV player.
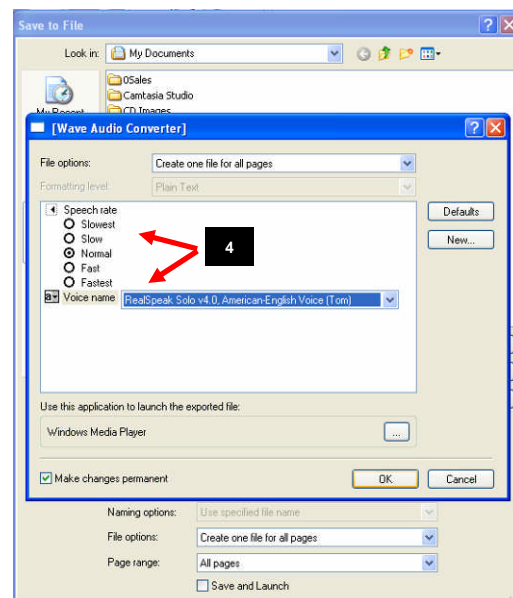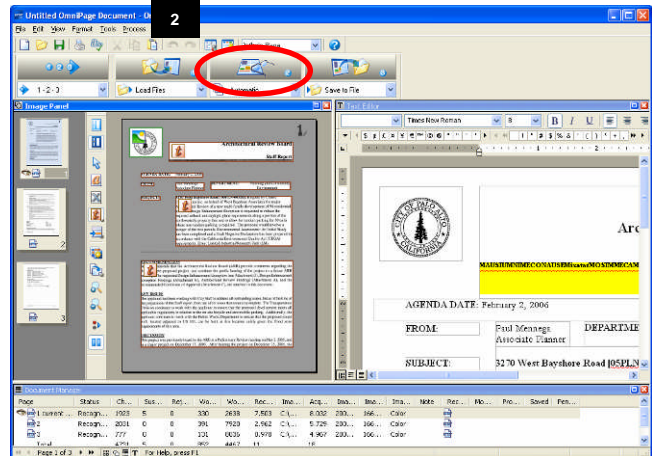
Advanced PDF Topics

Change the File Association for PDF files †

When the Scan to PC Desktop Professional software is installed on your PC, the file association for PDF files automatically changes to PDF Converter Professional. Therefore, when you open a PDF file, it opens in PDF Converter Professional.

To change the file association of the PDF files on your PC to Adobe Reader, or your preferred PDF viewing program, follow these steps:

1. On the Windows Desktop, right click on a PDF file and select Open With > Choose Program.
2. From the "Programs" list, select "Adobe Reader".
3. Check the option for "Always use the selected program to open this kind of file".
4. Click on "OK".
5. When you open PDF files, they will now automatically be opened in Adobe Reader.
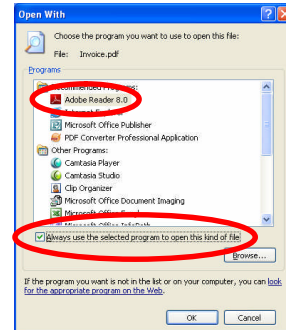
## Batch Conversion to PDF using the PDF Create! Assistant

Using the PDF Create! Assistant, you can automatically combine different file types into either a single PDF file or automatically create a PDF file for each individual file.

1. Open the PDF Create! Assistant by going to Start > All Programs > ScanSoft PDF Professional 4 > PDF Create! Assistant.
2. Click on "Add" and browse out and select the documents that you want to convert into PDF files.
3. From the drop-down menu, select to "Create One PDF per file" or to "Combine into one PDF document".
4. Click on the "Start converting…" button
5. You will be prompted to select where you want your PDF files saved. Browse to the location where you want your PDF files to be saved and click on "Save".
6. The "Print Info" window will provide information about the conversion process. Click on "Close" when the process has completed.
7. Your PDF files will be saved into the location that you specified in Step 5.
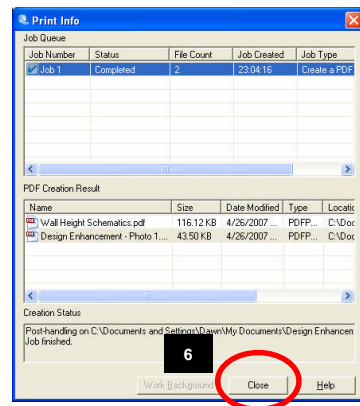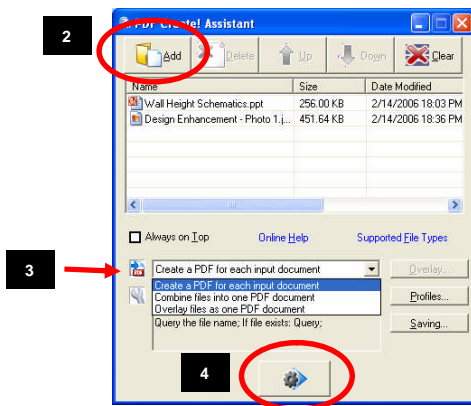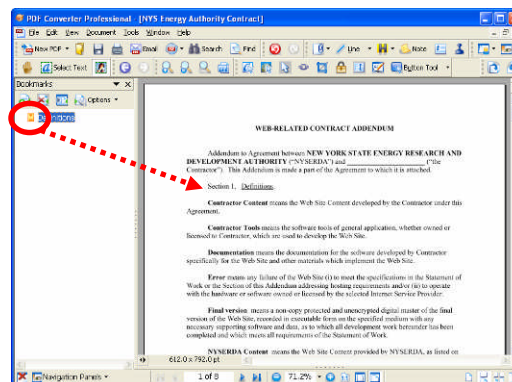
† Topics that are new or enhanced in Scan to PC Desktop Professional v9

Adding Bookmarks to PDF Files †
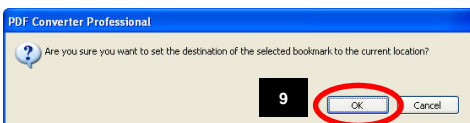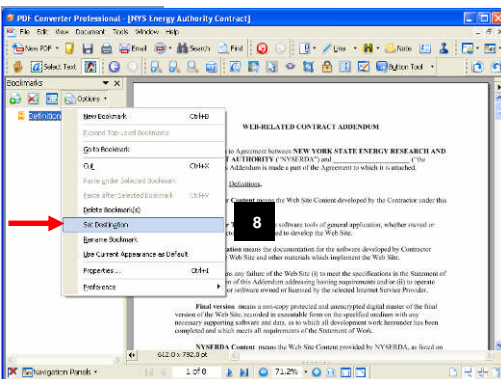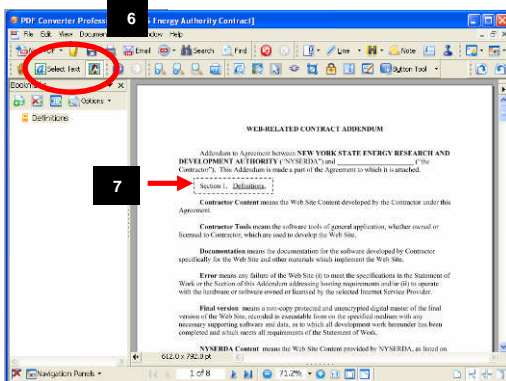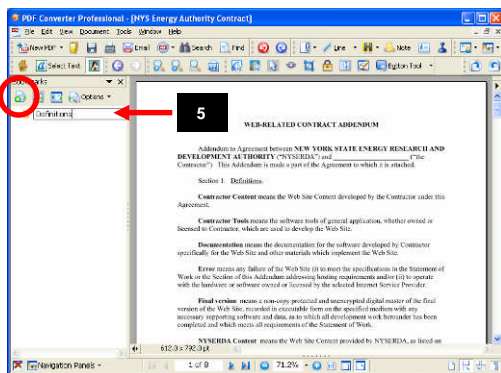
1. Go to Start > All Programs > ScanSoft PDF Converter Professional 4 > PDF Converter Professional.

2. Go to File > Open and browse to the location of the PDF file to which you want to add bookmarks.

3. Go to View > Navigation Panels > Bookmarks.

4. Click on the "New Bookmark" button

5. In the field that appears, type the name of the bookmark and then press "Enter" on the keyboard.

6. Click on the "Select Text" or "Select Image" button. Note that you must use the "Select Image" option if you are working with an Image Only PDF file.

7. Use your mouse to select the area that you want to bookmark.

8. Ensure that the name of the bookmark is still highlighted in the "Bookmarks" panel and click on Options > Set Destination.

9. When asked if you want to set the destination to the current location, click on "OK".

10. Now when you click on the icon next to the name of the bookmark in the Bookmark pane, you will automatically be brought to the section of the document that you selected as the destination in Step 7.

† Topics that are new or enhanced in Scan to PC Desktop Professional v9

Redacting PDF Files * † ScanSoft **PDF Converter 4** Professional

Redaction is the removal of content prior to release or publication. Redaction is often referred to as the "blacking out" of confidential text in a document to be produced, and has many applications in government, the court system and many regulated industries. PDF Converter Professional integrates precise redaction into the highlight, strikethrough and underline annotation tools found within the PDF Converter Professional application. Note that this feature is only available for PDF Normal and Text Searchable PDF files.

HR – Quickly remove sensitive personnel or salary information from documents.

Legal – Ensure that protected Client information stays private.

Government – Safely and permanently remove top secret information from electronic documents.

1. Go to Start > All Programs > ScanSoft PDF Converter Professional 4 > PDF Converter Professional.

2. Go to File > Open and browse to the location of the PDF file to which you want to redact.

3. Go to Tools > Comment and use the Highlight, Cross-Out, and Strikethrough tools to markup the document.

4. Go to Document > Redact Markup.

5. From the "Redact Markup" window, select whether you want the sections that are marked with Highlights, Strikeouts, or Underlines to be Redacted. You can also choose to enter Exemption Codes. Click on "Redact Markup".

6. The marked sections in the PDF file will be redacted.

7. When you save this document, a redacted and non-redacted copy will be saved. The redacted file name is saved as **r_*filename*.pdf**
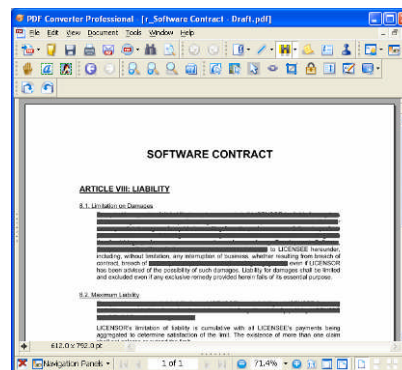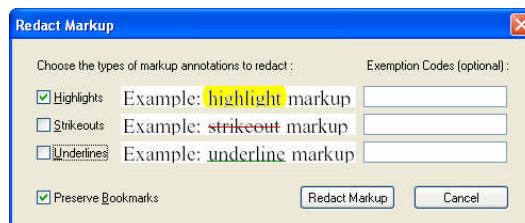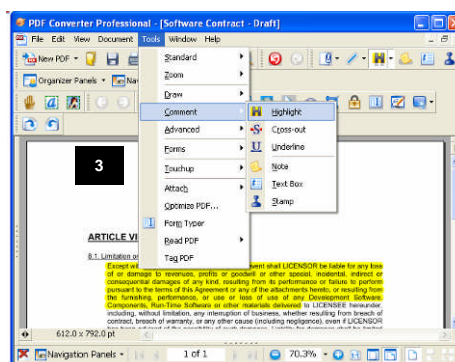
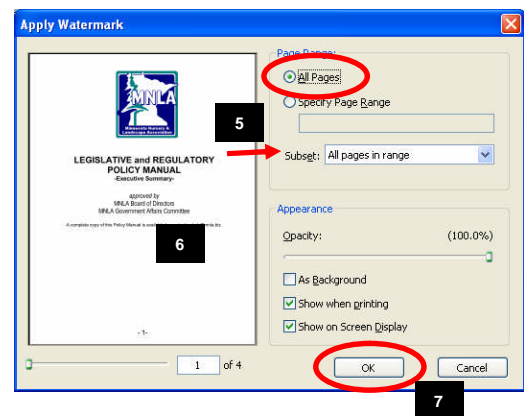† Topics that are new or enhanced in Scan to PC Desktop Professional v9

* Topics in the "Advanced Topics" section that are also included in the Customer Orientation Guide Training CD

Adding Page Numbers to PDF Files †   ![ScanSoft PDF Converter 4 Professional]

Automatically add page numbers to each page in an existing PDF file.

1. Go to Start > All Programs > ScanSoft PDF Converter Professional 4 > PDF Converter Professional.

2. Go to File > Open and browse to the location of the PDF file to which you want to add page numbers.

3. Go to View > Organizer Panels > Watermarks. The "Watermarks pane will appear.

4. From the "Watermarks" pane, double click on "Page Number".

5. From the "Page Range" section, select "All Pages".

6. From the "Subset" drop-down menu, select "All pages in range".

7. Click on "OK".

8. A page number will be added to the bottom of every page in the PDF file.

† Topics that are new or enhanced in Scan to PC Desktop Professional v9

Advanced PaperPort Topics

Creating a Signature Stamp

Creating a Signature Stamp is any easy way to quickly stamp a copy of your signature onto a document. This is a great tool for cover letters or for other documents that do not need to have a legally binding signature.

Please note that creating a Signature Stamp is not the same thing as adding a Digital Signature to a PDF file. For more information about Digital Signatures, use the Help menu in PDF Converter Professional.

To Create Your Signature:

**NOTE: You only need to complete these steps once.**

1.   Write your signature onto a blank white piece of paper.

2.   Scan in the page with your signature through your Xerox device.

3.   When you return to your PC in your office, you will see that PaperPort has opened and your scanned page with your signature is available on the PaperPort Desktop as a PDF file.

4.   On the PaperPort Desktop, right click on the PDF file and select "View" to open it in PaperPort's Page View.

5.   In "Page View", click once on the "Select Area" tool to select it.

6.   Using your mouse, draw a box around the area of the page that contains your signature.

7.   Click on the "Crop" button. Everything from the page will be deleted except for your signature.

8.   Go to File > Save As.

9.   From the "Save as type" drop-down menu, select "Windows Bitmap (*.bmp)".

10. In the "File name" field, type **signature** and then click on "Save". Go to File > Exit.

11. You will now see a copy of your signature saved onto the PaperPort Desktop as a Bitmap file.
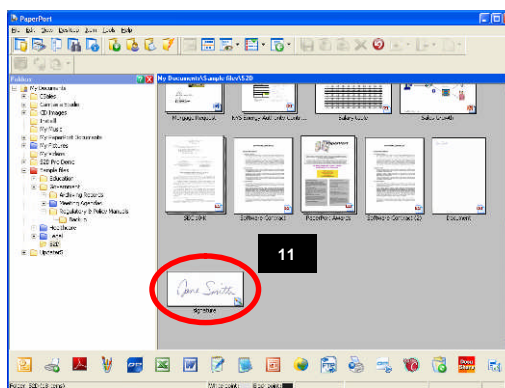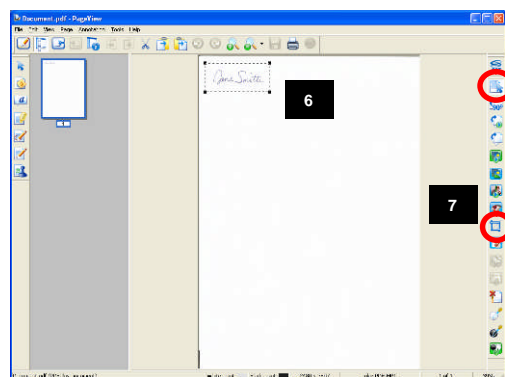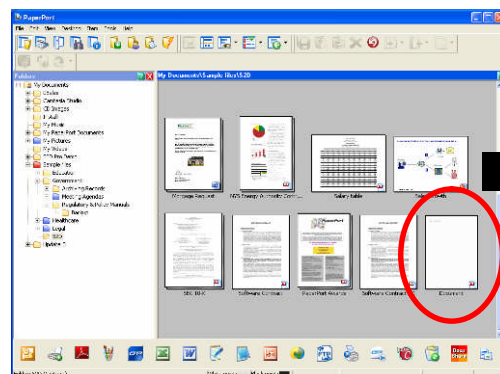
To Stamp Your Signature onto a PDF or Image file:

1. On the PaperPort Desktop, right click on the PDF or Image file and select "View" to open it in PaperPort's Page View.

2. In "Page View" click once on the "Stamp" tool to select it.

3. Using your mouse, click on the document in the location where you would like to stamp your Signature.

4. From the "Open" window, browse to the location of where you saved your **signature.BMP** file.

5. Click once on the **signature.BMP** file to select it and click on "Open".

6. Your Signature will be stamped onto the document at the location that you selected.

7. To adjust the size of your signature or move your signature to another location on the page, click once on the "Select Annotation" tool to select it. Use your mouse to drag and drop your signature to the location of your choice.

8. To return to the PaperPort Desktop, go to File > Exit. When asked if you want to save changes, click on "Yes".

9. You have now stamped your signature onto a PDF or image file.
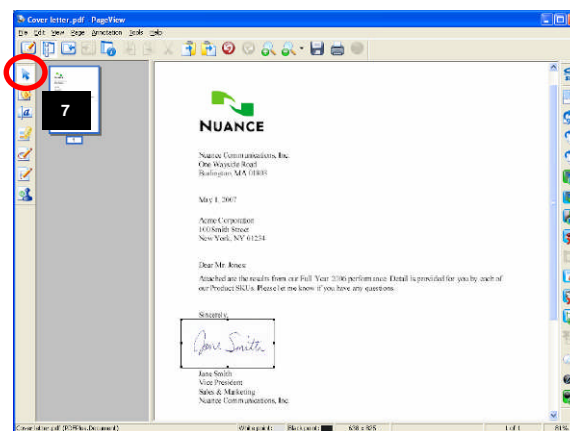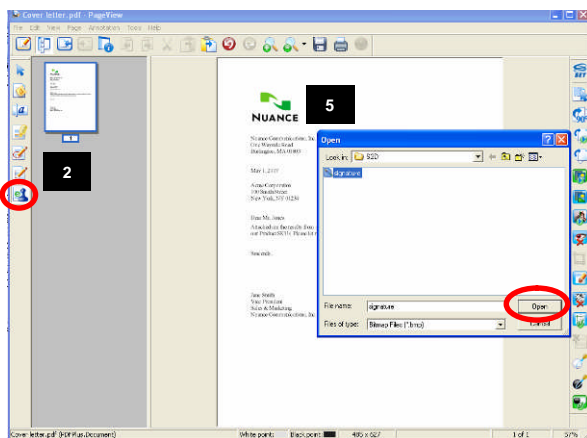
All-in-One Search

With PaperPort Professional 11, 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. Documents and images must be added to the All-in-One Search Index before they can be searched upon.

To Add One Document at a Time to the All-in-One Search Index:

1. Right click on the image file you want to add to your PaperPort's All-in-One Search index and select "Add to All-in-One Search" from the drop-down menu list.

2. PaperPort will automatically add the text in the file to the PaperPort All-in-One Search database for text files, image files, and PDF files.

### To Add All of the Documents and Images in a Folder to the All-in-One Search Index:

Note: The first time that you update the All-in-One Search Index, it may take a long time to complete. All future updates will only documents and images that have been changed or edited since the last index.

- Right click on the folder you want to add to your PaperPort's All-in-One Search index and select "Add to All-in-One Search" from the drop-down menu list.

- PaperPort will automatically add the text in the file to the PaperPort All-in-One Search database for text files, image files, and PDF files. The length of time that it will take to complete the All-in-One Search Index depends on the number and size of the documents and images contained within that folder.

To Add all of the Documents and Images in All of the Folders Displayed in PaperPort's Folder View to the All-in-One Search Index:

Note: The first time that you update the All-in-One Search Index, it may take a long time to complete. All future updates will only documents and images that have been changed or edited since the last index.

- Go to Tools > All-in-One Search…

- Click on "Update Index". PaperPort will automatically add the text in the file to the PaperPort All-in-One Search database for text files, image files, and PDF files. The length of time that it will take to complete the All-in-One Search Index depends on the number and size of the documents and images contained within all of your folders.

- As an alternative, you can click on "Index Manager" and use its tools to schedule an automatic update of your All-in-One Search Index. For more information about the Index Manager, refer to the PaperPort Help menu.
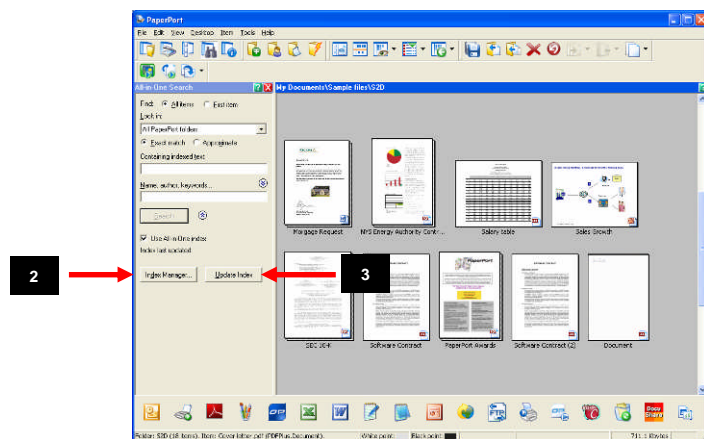
Searching for Documents and Images:

1. 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.

2. Click on the "All-in-One Search" button on the PaperPort Command Bar to initiate a text sensitive or keyword search.

3. In the "Containing indexed text" field, type in the word or phrase from the file for which you are searching. Ensure that the "Use All-in-One Index" and "Exact Match" options are selected.

4. Then click on the "Search" button in the Search pane.

5. All-in-One Search will search all documents and images that have been added to the All-in-One Search Index and will return to you a list, ranked by relevance, of all files containing your search criteria.

6. 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.
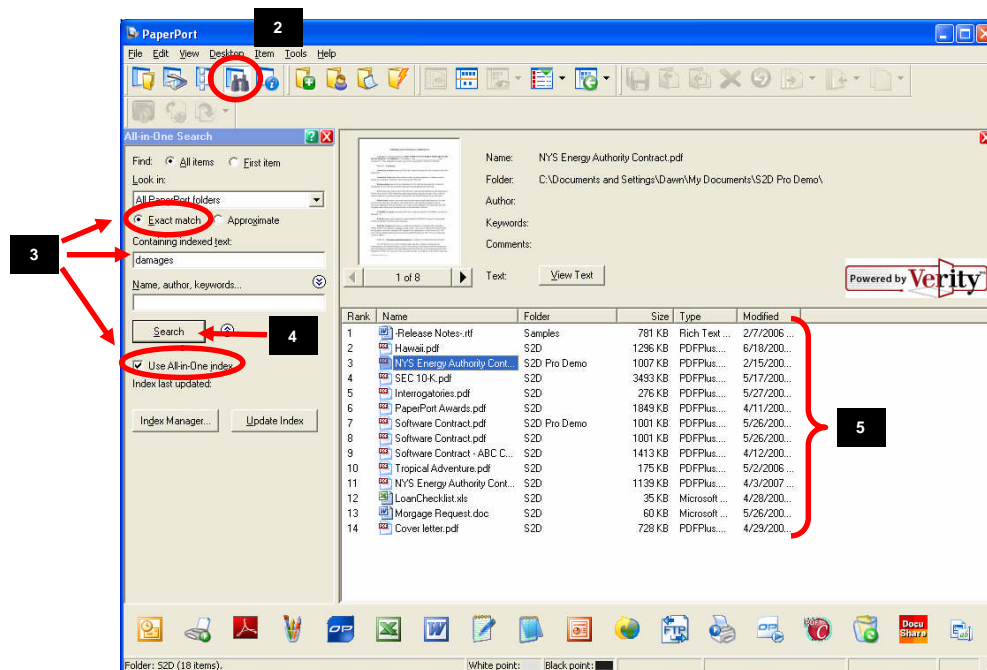
Changing Folder Colors in Folder View

Changing the color of folders in PaperPort's Folder View makes it easy for you to make frequently used folders stand out so you can access them quickly.

1. From the PaperPort Desktop, in the "Folders", right click on the folder.

2. Select "Folder Color".

3. From the "Set Folder Color" window, select the color of your choice, then click on "OK".

4. The folder will now be displayed as a different color in the "Folders" Pane.
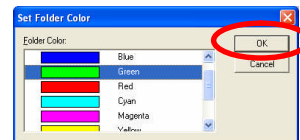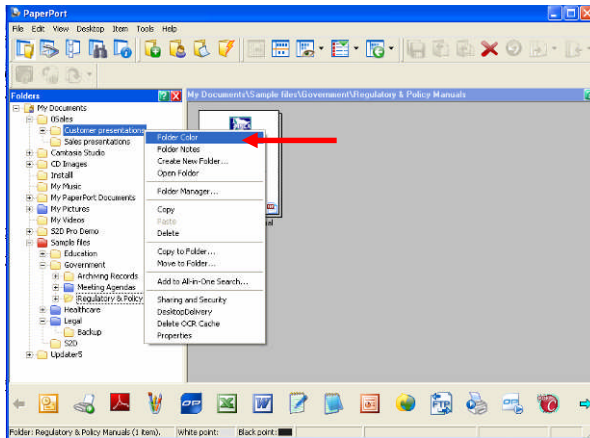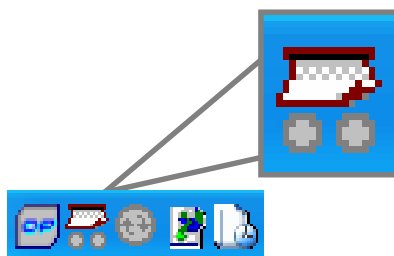
Image Retriever Settings
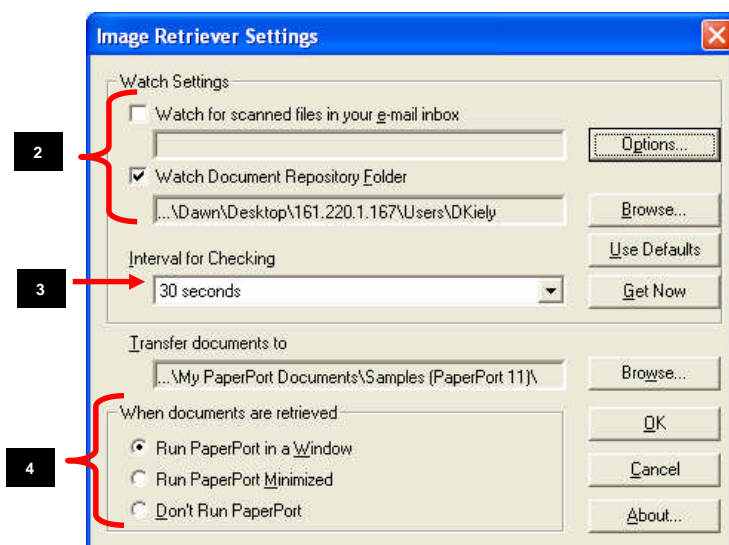
Image Retriever Settings *

ImageRetriever™

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 11 > 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

ImageRetriever™

1. Double click on the Image Retriever icon in the Systray. From the Image Retriever Settings window, select the desired settings for the Image Retriever tool.

2. From the Watch Settings, select if you would like Image Retriever to monitor your email inbox, a network folder, or both.

3. 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.

4. Select how you want PaperPort to behave after documents are retrieved.

5. Select OK to close the window.

* Topics in the "Advanced Topics" section that are also included in the Customer Orientation Guide Training CD