

# PaperPort 14 Getting Started Guide

Version: 14.7

Date: 2019-09-01

The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a modern, clean design.

# Table of Contents

<b>Legal notices</b>	<b>4</b>
<b>Welcome to PaperPort</b>	<b>5</b>
Accompanying programs	5
Install PaperPort	5
Activate PaperPort	6
Registration	6
Learning PaperPort	6
Minimum system requirements	7
Key features	8
<b>About PaperPort</b>	<b>9</b>
The PaperPort desktop	9
The PaperPort ribbon	9
PaperPort items	10
The MAX to PDF converter	11
The Folders pane	11
PaperPort item thumbnails	12
PaperPort page thumbnails	14
Two-part desktop	14
Bookmarks	14
The Image View window	15
Customizable Quick Access Toolbar	15
PDF Viewer Plus	15
<b>Acquire items</b>	<b>15</b>
Scan to the PaperPort desktop	16
Set up your scanner with PaperPort	16
Using Scan Profiles	17
Print to PaperPort	17
Add PaperPort folders	17
Use DesktopDelivery	18
Import pictures from your camera	18
<b>Touch up images</b>	<b>18</b>
Scanner Enhancement Technology tools	19
Enhancing images manually	21
Edit multiple images	21

<b>Annotate pages.....</b>	<b>21</b>
Annotating tools.....	22
<b>Protect items.....</b>	<b>22</b>
Filing items.....	23
Add search criteria to items.....	24
<b>Find items.....</b>	<b>24</b>
Find items by their properties.....	24
Find words in an item.....	25
Add items to the All-in-One Search index.....	25
Use the All-in-One Search pane.....	26
Use PDF Searchable Image.....	26
Schedule indexing tasks.....	27
Sharing files.....	27
Connecting to the Cloud.....	28
<b>Send items to other programs.....</b>	<b>28</b>
Use OmniPage with PaperPort.....	28
Customize the Send To bar.....	29
Adjust Send To options.....	29
<b>Convert items.....</b>	<b>29</b>
Convert items to image formats.....	29
Stacking documents.....	30
Combining documents.....	30
Convert images to text.....	30
<b>Filling forms.....</b>	<b>31</b>
<b>PDF file support.....</b>	<b>31</b>
Create PDF documents.....	33
Create PDF Documents with Power PDF Create.....	33
<b>About ScanDirect.....</b>	<b>34</b>
<b>Uninstall PaperPort.....</b>	<b>35</b>
<b>Third party trademarks and credits.....</b>	<b>35</b>

# Legal notices

Copyright © 2019 Kofax, Inc. All rights reserved. No part of this publication may be transmitted, transcribed, reproduced, stored in any retrieval system or translated into any language or computer language in any form or by any means, mechanical, electronic, magnetic, optical, chemical, manual, or otherwise, without prior written consent from Kofax, Inc, 15211 Laguna Canyon Road, Irvine, CA 92618-3146, United States The software described in this book is furnished under license and may be used or copied only in accordance with the terms of such license.

## **IMPORTANT NOTICE**

Kofax, Inc. provides this publication “AS IS” without warranty of any kind, either express or implied, including but not limited to the implied warranties of merchantability or fitness for a particular purpose. Some states or jurisdictions do not allow disclaimer of express or implied warranties in certain transactions; therefore, this statement may not apply to you. Kofax reserves the right to revise this publication and to make changes from time to time in the content hereof without obligation of Kofax to notify any person of such revision or changes.

## **TRADEMARKS AND CREDITS**

Kofax, ScanSoft, OmniPage, PaperPort, True Page, Direct OCR, Logical Form Recognition, and DocuDirect are registered trademarks or trademarks of Kofax, Inc. in the United States of America and/or other countries.

All other company names or product names referenced herein may be the trademarks of their respective holders.

## **THIRD PARTY LICENSES/NOTICES**

Please see acknowledgements/notices at the end of this guide.

Kofax, Inc

15211 Laguna Canyon Road,

Irvine, CA 92618-3146,

United States

LID: 20190827

# Welcome to PaperPort

Welcome to the *Kofax PaperPort Getting Started Guide*. It is supplied as a PDF file, suitable for use with screen readers. If you print it to paper, we recommend double-sided printing with two pages per sheet.

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

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

## Accompanying programs

PaperPort 14 includes a PaperPort Image Printer, a ScanDirect application, (described later), a Scanner Setup Wizard, an ImageViewer application (for viewing and working with page images in a window separate from PaperPort) and PDF Viewer Plus (for viewing and working with PDF files).

In PaperPort Professional, the PDF Viewer Plus includes Kofax Power PDF Create, providing high-level support for PDF creation from a wide variety of source files.

## Install PaperPort

You can install PaperPort from a CD, a DVD, or from the web. The installation program provides easy step-by-step instructions. Follow the guidance on each screen to install the software. Installation and un-installation require Administrator rights. PaperPort installation comprises several elements that are installed in a single process:

- PaperPort program (includes ImageViewer, ScanDirect, MAX to PDF Converter, an Evernote connector, and the Scanning Wizard)
- Kofax PDF Viewer Plus
- Kofax Power PDF Create 3.1 (in PaperPort Professional only)
- PaperPort Image Printer

PDF Viewer Plus is not installed if the top-line PDF Pro 8 is detected on the computer because it provides all the functionality of PDF Viewer Plus, and much more additionally.

To install PaperPort and its key components:

1. Click **Autorun**.
2. Select an installation language.

3. Click **Start Installation**.
4. Accept or change the program folder location, fill out **Customer Information** and click **Next**.
5. Read and accept the terms in the license agreement.
6. Autorun then starts the InstallShield Wizard. It offers a **Complete** or a **Custom** installation. Choose **Custom** only if you want to add your own folders to the supplied PaperPort folders during installation. You can add folders later.

If PDF Viewer (Plus) is to be installed, the following check marks appear:

**Set Kofax PDF Viewer as your default viewer for Windows and Internet Explorer**

This sets PDF Viewer Plus as your system default PDF viewer. PDF files on the PaperPort desktop are by default opened in a Kofax PDF product. If you select this option, PDF files that are double-clicked anywhere on your system will open in PDF Viewer Plus.

**Install all Kofax PDF button and menu application add-ins**

This choice appears only in PaperPort Professional. It places a Kofax PDF ribbon or toolbar in Microsoft Word, Excel, PowerPoint, Outlook, Internet Explorer, Windows Explorer and Corel WordPerfect, allowing Power PDF Create to make PDF files from the current document or mail attachment or web page.

## Activate PaperPort

Most versions of PaperPort 14 require activation. For activation and deactivation you need web access. You will be invited to activate the product at the end of installation. Choose from automatic or manual activation. The recommended choice is automatic. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PaperPort 14 can be launched only a limited number of times without activation.

## Registration

Registration enables you to take full advantage of 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 Kofax web site at <https://www.kofax.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 a comprehensive Help system, the How-to-Guides, Release Notes, and the Kofax web site. Access these resources from the Help ribbon.

### Using this guide

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

### Using help

The PaperPort Help includes detailed information on features, settings, and procedures. Help is available from the PaperPort Help ribbon.

Additional technical support, including technical notes, software updates, product information and product support issues and more is available also from the PaperPort Help ribbon. PDF Viewer Plus, and also Kofax Power PDF, have their own Help systems that include guidance on PDF creation.

### Using release notes

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

### Technical support

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

Visit <https://www.kofax.com> for information about your support policy, local support contacts, and product updates. Before contacting Kofax, be sure to read the user documentation and review the Release Notes.

## Minimum system requirements

Minimum hardware requirements:

- Intel Pentium 4 compatible or higher processor
- 1 GB of memory (RAM)
- 1,4 GB of free hard disk space for application files, plus 50 MB working space during installation
- Windows-compatible pointing device
- 1024×768 pixel resolution display with 16-bit (High Color) or higher
- A compatible scanner with its own scanner driver software

Supported operating systems:

- Windows 10, 32-bit and 64-bit versions
- Windows 8.1, 32-bit and 64-bit versions
- Windows 7, 32-bit or 64-bit versions with Service Pack 1

Supported web browsers:

- Internet Explorer
- Mozilla Firefox
- Google Chrome

A CD or DVD drive, or web access is needed for installation. Web access is needed for online activation, product registration, Scanner Wizard database updating, technical support, and obtaining live updates for the program.

To use Evernote connector, you need Microsoft .NET Framework 4.5.2. If it is not detected, it is installed with the product.

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

## Key features

### **High-quality PDF performance**

PDF files can be opened quickly and displayed in PDF Viewer Plus, a Kofax PDF handling application that is fully compatible with all leading PDF creation products. PDF Viewer Plus opens files faster than the general-purpose ImageViewer, reducing memory requirements and permitting smaller file sizes. The viewer optimizes the rendering resolution for each element on the page yielding a cleaner display and optimum print resolution.

PDF Viewer Plus provides annotations and dynamic or transparent stamps. Images within a PDF document processed by PDF Viewer Plus can be sent to the ImageViewer to be enhanced using SET tools, with the modified image returned to the PDF.

Fill and e-mail PDF forms and create new ones, either from scratch or using FormTyper in PDF Viewer Plus to instantly make any static form fillable. It uses Logical Form Recognition technology to detect the form elements and also allows their properties to be managed efficiently.

Searchable PDF files are available through Scanning Profiles, through a right-click Save As operation on the PaperPort Desktop, or directly in PDF Viewer Plus. This makes the content of your scanned paper documents or image files accessible to search engines such as Windows Desktop Search or Google.

### **Accurate OCR**

Language settings can be applied to Optical Character Recognition to increase accuracy in all supported languages.

### **Digital camera input**

It is possible to take a picture of a document with a digital camera and accurately convert it into a text document. This is done by applying special 3D-deskewing algorithms that flatten page images and correct distortions to increase the accuracy of the resulting text document.

### **Making PaperPort more reliable**

Sometimes PDF files may become corrupted so that they can no longer be opened. In these cases PaperPort may not be able to generate a desktop thumbnail and this may prevent PaperPort from launching properly.

A utility program CheckPPFolders.exe is supplied in the PaperPort program folder, along with a short Help file. Run this program to identify and remove any corrupt files so that PaperPort will work properly.

The following advanced features are available only in PaperPort Professional:

### **Folder management**

You can automatically create multiple folders by importing a list of folder names from a text file. This option is available when you right-click on any folder. See About PaperPort folders for the required syntax.



### **Power PDF Create Assistant**

You can create industry-standard text-based PDF documents from any application directly with a right-click through the Windows or PaperPort Desktops (up to PDF version 1.7), using the PDF Create Assistant or by printing directly from any application with the printer driver called Power PDF. You can create PDF packages, batch create PDF files and much more using the PDF Create Assistant. A table in the Help topic: About creating PDF files summarizes which starting places, inputs, options and targets are available.

### **Support for SharePoint**

PaperPort Professional is able to communicate with the Microsoft SharePoint 2010, 2013, and 2016 document management systems: get files from there, process them as desired, and then save the results by sending the output files back through the Send To bar. ScanDirect supports scanning to PDF with the results directed to SharePoint.

## About PaperPort

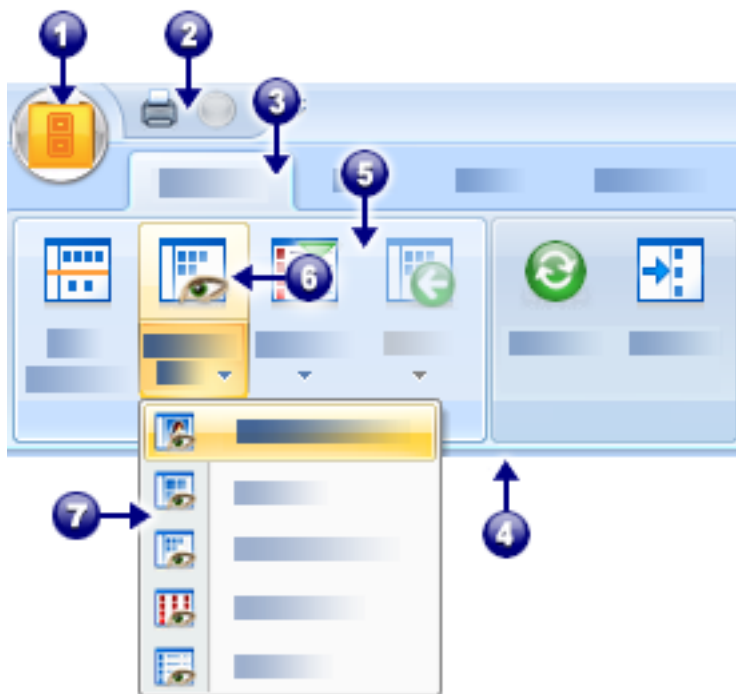
This section introduces you to the different parts of PaperPort. Refer to the PaperPort Help for detailed information about all these topics.

### The PaperPort desktop

The PaperPort desktop appears with the Folders pane when you first start the program. It displays the documents in the chosen folder as thumbnails and provides tools to manage them. PaperPort offers all the tools necessary to organize, find, and use documents and images. Choose **Options** from the Desktop ribbon and go to the Desktop panel to choose a color scheme for the desktop and its elements.

### The PaperPort ribbon

PaperPort 14 and ImageViewer have a modern tab and ribbon interface. The main elements are:



1. The PaperPort button
2. Quick Access Toolbar
3. Tab
4. Ribbon associated with the tab
5. Group inside the ribbon
6. Button within the group
7. A button drop-down list

## 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, drawings and other digital items in an image format, such as PDF Image, PDF Searchable, JPEG, TIFF, or PaperPort Image files (these MAX files are read-only). They can be scanned, copied or imported into 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. Normal PDF files are considered to be text items.

Image items when double-clicked open by default in Image View that offers many image-handling tools, including the SET tools. Go to **Options > Desktop** to change this behavior. You can choose

ImageViewer; this offers the same functionality as Image View, but in a separate window so you can still view the PaperPort desktop as you edit the chosen item. This is especially useful in a dual-screen environment. You can also choose to open the item in the application associated with the file type.

You can use any flavor of PDF file: PDF Image, PDF Searchable, and PDF Formatted Text and Graphics (PDF Normal) with PaperPort. PDF files by default open in PDF Viewer Plus or (if available) Kofax Power PDF. Go to **Options > Desktop** to change this behavior. You can open PDF Image or PDF Searchable files in ImageViewer in order to use the SET tools to improve the quality of PDF image-only items.

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

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

## The MAX to PDF converter

MAX files have long been the proprietary PaperPort image item format. This functionality has now been taken over by the universal PDF file type. In PaperPort 14, MAX files retain limited functionality: they can be viewed page-by-page but cannot be annotated, stacked or otherwise edited. Metadata (author, subject, keywords) cannot be added in PaperPort 14, only already existing texts remain. In other words, MAX files are now read-only.

Kofax offers a Wizard-like program to convert MAX files to PDF. Find the MAX to PDF converter in the PaperPort sub-menu in the Windows Start menu. It can create PDF Image or PDF Searchable files by running OCR on text in the MAX file. The converter allows annotations to be transferred to the resulting PDF. Language choices are available separately for the MAX file content and for its annotations. The converter can automatically find all MAX files within your PaperPort folders.

MAX files can be detected and imported into PaperPort Professional by DesktopDelivery. They can be exported to some other programs (for instance to mailing applications, or to OmniPage for OCR).

## The Folders pane

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

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

- The **My PaperPort Documents** folder contains several subfolders whose names – such as **Articles**, **Business Cards**, **Photographs**, and **Receipts** – illustrate the different ways you can organize your items in PaperPort.
- The **Samples** folder contains sample documents and photographs to help you get started using PaperPort. This *Getting Started Guide* is placed in the **Samples** folder as a read-only PDF file. We

recommend you copy the item and remove the read-only property from the copy if you want a text file (PDF Normal) for experimentation.

- Choose **Folders** to view the Folders pane to view the pre-supplied folders. Select a folder, right-click and choose **Create New Folder** to add an empty subfolder with a name and color you choose. You can use the Folder Manager to add existing folders and sub-folders from your file system. This lets you set up a different view of folders than exists on your computer – tailoring it to work you will do via PaperPort.
- Choose **Folder Manager** on the Tools ribbon or right-click in the Folders pane and choose **Folder Manager**. Click **Add** and browse to an existing folders or sub-folder. They are added as top-level folders to the PaperPort desktop along with their sub-folders and content. For instance, if you chose C:\MyReports\Fourth Quarter, this appears in PaperPort as Fourth Quarter on C. To later see the full path of an added folder, right-click and choose Properties.

Right-click on a folder to change folder color, add folder notes, create new sub-folders, and set DesktopDelivery options.

The Folder Manager lets you rename, remove and reorder the top-level folders it manages. This does not affect the names, locations or existence of those mapped folders in your computer. Sub-folders that you rename or reorder which were not added using the Folder Manager are really renamed or moved in your system.

### Deleting folders

Any sub-folder in PaperPort can be deleted using its shortcut menu or the Delete key. This means it disappears from PaperPort and also from your computer's disk system. Any sub-folders of the chosen folder are also deleted. A warning message asks you to confirm this deletion. Only top-level folders cannot be deleted inside PaperPort. The folder **My PaperPort Documents** is a sub-folder.

### Removing folders

Any folder or sub-folder added to PaperPort via the Folder Manager becomes a top-level folder and it can be later removed using the Folder Manager again. This means it disappears from PaperPort but remains on your computer's disk system. When a top-level folder is removed, all its sub-folders are also removed.

## PaperPort item thumbnails



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





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


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

- Scanned pages and photos
- Photos from your digital camera
- Image files in formats such as BMP, TIFF, JPEG, GIF, and MAX (read-only)
- Microsoft Word, PowerPoint, Excel, Corel WordPerfect, and other documents created in popular software programs
- PDF documents
- PDF Image items
- HTML documents

Text items have generic thumbnails displaying only the document type and item name. Each item thumbnail appears with an icon that identifies the program in which it was created or is currently associated.

Click on a thumbnail to see image attributes:

-  indicates that the Read-only attribute is set for that item.
-  indicates that the image has annotations.
-  icon information on author, keywords, tips and features.
-  indicates that the PDF file has searchable text.

Multi-page image items (TIFF, DCX, PDF, MAX, etc.) show  to let you scroll through the pages even with the Page Thumbnails pane closed.

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

- Drag a thumbnail to reposition it on the PaperPort desktop.
- Drag a thumbnail to a folder to move the item to that folder.
- Drag a thumbnail to another open Workspace to move the item to that open folder.
- Double-click a thumbnail to view the item.
- Press the **Ctrl** key and double-click a thumbnail to open the item in its source program.
- Right-click a thumbnail to display the item's shortcut menu.
- Drag a thumbnail to the Send To bar to send a copy of the item to another program.
- Right-click a thumbnail and select **Save Thumbnail** to save a thumbnail image as a separate image file (JPEG, PNG, TIFF and BMP formats supported).

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

If you are not seeing thumbnails, right-click in the Workspace or use the **Change View** button and choose **Thumbnails**. Other choices are large or small icons, a list or a list with details.

## PaperPort page thumbnails

The Page Thumbnails pane on the PaperPort desktop and in ImageViewer displays thumbnails for multi-page image items. Select a multi-page image item, then click the **Thumbnail** button on the Desktop ribbon. Page-level operations can be done quickly without having to open the files. You can:

- Enlarge or reduce thumbnail size (all image items and PDF files of all flavors).
- Copy selected pages to a Workspace as separate PDF files (from all non-PDF image items)
- Move selected pages to a Workspace as separate PDF files (from all non-PDF image items except MAX files)
- Copy and move pages between documents open in different panes. (from all image items except MAX files)

The following operations are available for PDF files, on the PaperPort desktop or in PDF Viewer Plus:

- Copy, paste, cut, delete and reorder pages.
- Insert new pages at a certain location in the document.
- Append new pages at the end.

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

## Two-part desktop

When you first start PaperPort Professional, the desktop appears split into two Workspaces – top and bottom. This layout gives you a better oversight necessary to organize and combine your documents more effectively even in a cross-folder fashion. Commands always relate to the currently active workspace.

If the Desktop is not split, select **Split Desktop** from the View group in the Desktop ribbon. Click it again to remove the split.

If you work with documents containing multiple pages, you can use the corresponding function pane to view page thumbnails without having to open the given document. You can also use these desktop areas to view your folders, or the properties of the selected item.

## Bookmarks

You can bookmark the Workspaces of your choice by using the **Bookmark Workspace** command from the Workspace group in the Desktop ribbon. To manage workspace bookmarks, use the **Organize Bookmarks** command. Getting to a frequently used Workspace is just a mouse click away, since they are all displayed in the same list. Other buttons in the group let you return quickly to recently open or scanned items.

You can also bookmark favorite web pages, using the web bookmarks in the Extras group of the Tools ribbon. The bookmarks in your default browser are already added, select a new web page and click the button to bookmark it.

## The Image View window

To view an image item in the Image View window, double-click its thumbnail in Desktop view, or choose **Open with Image View** on the Desktop ribbon or from its shortcut menu. By default PDF files appear in PDF Viewer Plus, not in Image View.

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

## Customizable Quick Access Toolbar

PaperPort's buttons are placed on different ribbons according to their functionality. You can place frequently used buttons on the Quick Access Toolbar in PaperPort and also in ImageViewer. Right-click within the ribbons area and choose **Customize Quick Access Toolbar**.

## PDF Viewer Plus

PDF files on the PaperPort desktop when double-clicked appear by default in PDF Viewer Plus. You can drag other files onto the PDF Viewer Plus icon in the Send To bar to have a copy converted to PDF and opened in the PDF Viewer. The first page appears in the main screen area; a navigator panel on the left shows page thumbnails or form controls and a comments panel can be displayed along the bottom of the screen. An organizer panel on the right offers stamps. If an image-only PDF enters the PDF Viewer, the program may offer to make it searchable. If not, choose **Make Searchable PDF** from the Tools menu.

Active PDF forms can be filled in directly in PDF Viewer Plus. Static forms, for instance ones scanned to PaperPort, can be turned into fillable forms by using FormTyper.

PDF files opened from the PaperPort desktop return there when you finish editing or annotating them with all the updates included.

## Acquire items

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

- Scan photos, pages, and other images on a scanning device.
- Add folders to PaperPort that already contain images and documents.

- Import files from other programs on your computer.
- Print documents from other programs to the PaperPort desktop.
- Drag or cut-and-paste images and documents from Windows Explorer, or other programs to the PaperPort desktop.
- Acquire photos from a digital camera.
- Bring files into PaperPort Professional using DesktopDelivery.
- Print web pages to PDF files for use in PaperPort.

## Scan to the PaperPort desktop

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

1. Click the Scan Settings button to display the Scan or Get Photo pane. Choose a scan profile. Profiles are optimized for typical scanning tasks.
2. Then choose between using the native interface of the scanner or utilizing the new Scanner Settings pane of PaperPort for best scanning results. To use the interface of the scanner driver, select Display scanner dialog box. Leaving it empty will put the scanned item onto the active Workspace.
3. Turn on the Capture Assistant to add subject, author and keywords to items and (in PaperPort Professional) to view and control scanning progress.

When the scan is complete, you will see your item on the PaperPort desktop.

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

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

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

**Note** You can also use a high-speed, networked scanner to scan items to a networked folder and then add the folder to PaperPort. Use DesktopDelivery to monitor folders for incoming scanned images.

## Set up your scanner with PaperPort

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

Properly installed and correctly functioning scanners are immediately available in PaperPort by clicking the Select button, and choosing one in the Available Scanners dialog box.



If you are not satisfied for your scan results, you can run the PaperPort Scanner Setup Wizard from the Start menu, under the program group PaperPort 14.

## Using Scan Profiles

PaperPort comes with scan profiles optimized for typical scanning tasks. Choose Black and White, Grayscale or Color Document, Color Photograph, Color Searchable PDF Document, or Color PDF-MRC High Compression.

Scan profile panels have the following tabs:

- **Profile:** Displays the currently used scan profile.
- **SET:** Define enhancements to be run automatically.
- **Output:** Set file format and automatically suffixed file names.
- **Scan:** Adjust scan settings: mode, resolution, size, orientation, filter color, brightness and contrast.

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

## Print to PaperPort

To bring items in from other programs, print them to the PaperPort desktop as PDF Image or PDF Searchable. The default is PDF Image; go to **Desktop > Options > Item** to change it. To bring items in from other programs, you can print them to the PaperPort desktop as PaperPort Image (.max) items. This lets you quickly import spreadsheets, pictures, database files, word processing files, and other files into PaperPort as PDF items on the PaperPort desktop. This works through the File menu (or equivalent) in the source application; choose Print to PaperPort or choose Print, then choose PaperPort Image Printer printer driver.

With PaperPort Professional, you can use Power PDF Create add-in buttons in Office applications to make a PDF from the current document or attachment in the Formatted Text & Graphics (PDF Normal) format. Do this also by choosing Print and selecting Power PDF as the printer name. Choose Print in your web browser to create print-formatted views of web pages. The printer called PaperPort Image Printer gives you PDF Image or PDF Searchable files, while the Power PDF printer gives you Normal PDF.

In all cases, PaperPort is launched if not running and the PDF file is placed on the current desktop.

## Add PaperPort folders

PaperPort provides an easy-to-use filing system for organizing your items and sharing them with others.

In the Folders pane, you can:

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

Initially, the Folders pane shows a set of folders designed to help you get started using PaperPort. You can move or delete these folders whenever you prefer. If you choose a custom installation, you can add your own folders at that time.

Any time later, you use the Folder Manager to 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.

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

## Use DesktopDelivery

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

You can apply Folder Notes to password protected documents and monitor e-mail inbox folders and network or local folder. Refer to the PaperPort Help for details.

## Import pictures from your camera

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

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

## Touch up images

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

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











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





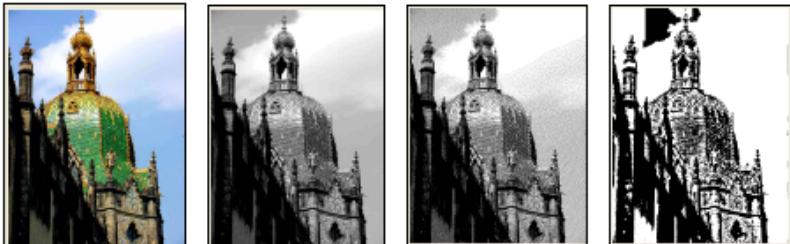







In the Image View window the Page ribbon contains the SET tools to modify the current page. Some of these tools are also available on the PaperPort desktop for use with all pages in the selected item.

## Scanner Enhancement Technology tools

The availability is shown like this:

- P= Image View or ImageViewer (Page ribbon) to change the current page only.
- PI = Also on PaperPort desktop (Item ribbon) to change all pages in selected item(s).
- PM = Also in PaperPort desktop shortcut menu to change all pages in selected item(s).
- PS = Also available in a Scanning Profile to modify all incoming images.

Tool	Description
 Select Area (P)	Use the <b>Select Area</b> tool to select part of an image you want to cut, copy, or delete with commands on the Page ribbon or shortcut menu. Use it to select part of an image for cropping, using the Remove Red Eye, Erase Inside or Erase Outside tools.
 Rotate (PI)	Click the Rotate tool to rotate the selected page or item 90 degrees to the left, right or by 180 degrees.
 Straighten an image	Sometimes a document is crooked when scanned. When this occurs, you can use the <b>Straighten</b> (P) and <b>Auto-Straighten</b> (PSI) tools to adjust it. Straightening lines of text in a black-and-white image file will yield better OCR results.
 Auto-enhance (PSI)	The <b>Auto-Enhance</b> feature adjusts the brightness and contrast, color, and tint of an image or item. PaperPort analyzes the image and tries to correct whatever is wrong with it.
 Enhance an image (P)	You can manually adjust your image using the <b>Enhance</b> tool. It lets you change brightness, contrast, color and tint values and choose the best result from nine candidates.
 Sharpen an image (P)	Select the <b>Sharpen</b> tool to adjust the sharpness of a blurry picture or blur a sharp image for special effect.
 Remove red eye (P)	The <b>Remove Red Eye</b> tool helps you to remove the red-eye effect from a selected part of a picture. Red Eye may occur when photo-graphing people or animals in low light or with a flash.
 Remove part of an image	Use the <b>Selection</b> tool to define the part you want to keep and use the <b>Crop</b> tool (PS) to remove the remainder. Select the <b>Eraser</b> tool (P) to erase an image area that you draw over with the pointer.
 Resize (PSI)	Resize an image or item and/or change its resolution or define these settings for a scanning profile. (Colors can also be converted or inverted).
 Remove stray dots (PM)	Scanned images sometimes include dots or speckles. The <b>Stray Dots</b> tool automatically finds and removes such 'dirt' from a page. Use it for better OCR results on black-and-white images.

Tool	Description
 Improve lines (PM)	The <b>Improve Lines</b> tool (for black-and-white images) darkens lines and connects broken lines in a table or form to appear darker and straighter. The use of this tool will render better recognition results.
 Erase outside (PS)	Use this tool to clear shadows and spots from page edges to improve OCR performance. Called <b>Erase Edges</b> in the Scan profile. There is also an <b>Erase Inside</b> tool (P).
 Invert colors	Use this tool to change the image to inverted color values. (PMI)
 Convert color	Use this tool to change color images to grayscale, halftone or black-and-white. (PMI)  
 Punch-hole removal	Remove hole marks from page sides, replacing them with the background color. (PMIS)
 Auto-Crop	This tool crops images according to pixel settings you provide. (PMIS)
 Black border cleaning	This tool removes scanning shadows from page margins. (PMIS)
 Despeckle	This tool cleans black-and-white images using a chosen despeckling type. (PMI)
 Set white point (P)	Click this tool, then click on a light color in the image that will become the white point. See below.
 Set black point (P)	Click this tool, then click on a dark color in the image that will become the black point. The colors chosen for the new white and black points are displayed on the Status bar.
 Apply current black and white points	Click this tool to apply the new black and white points to the current image (P) or item (I). If the result is not acceptable, undo your changes and pick new values.

Change black and white points to improve image quality by removing the dark and overexposed areas. All colors lighter than a chosen white point will become white. All colors darker than a chosen new black point are set to black.

A typical use for this is to remove a shaded gray background in a document you want to OCR. Select one of the darker gray pixels from the background and apply it as the white point. Then the background will become white. Changing black and white points for a color photo will typically increase its contrast, but may also change color values.



You can apply new black and white points to individual images, as described. You can also apply them as an auto-enhancement to all new pages scanned with a given scan profile.

## Enhancing images manually

Choose **Enhance** from the Page ribbon in Image View to receive nine candidate variants of your picture. Adjust brightness and contrast, color, or tint, then double-click the desired image. It is placed in the center and becomes the new original. The first original remains and can be reset.

## Edit multiple images

The ability to process items as a group is often referred to as batch processing. PaperPort provides batch processing features so that you can quickly enhance, modify, or rotate multiple image items in a single operation. Select one or more image items on the desktop, and then, on the Item ribbon, choose the desired command. See the Help for more information.

# Annotate 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. For a wider offering of PDF annotation tools use the supplied Kofax PDF product. All other image items must be annotated in Image View or ImageViewer, but remember that you can drag any of these files onto the Kofax PDF product icon on the Send To bar to have them converted to PDF Image or PDF Searchable, ready to be annotated or otherwise edited.

In PDF files, annotations are editable, meaning that you can reposition, change, 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 or PDF Searchable format. The recipient only has to double-click on the e-mail attachment they receive from you and they will see the document in the system default PDF viewer – annotations intact.

## Annotating tools

You can select an annotation tool from the Annotation ribbon whenever you display an image item in the Image View window. Use commands in the Annotation Settings group to change properties for future annotations created with that tool. This does not affect existing annotations. To turn off any annotation tool, click a different one – the **Select Annotation** tool is usually the best for this. See a detailed list of these tools in Help.

Use the following commands in PDF Viewer Plus:

Tools	Description
 Hand	Select this tool and click in an annotation to move, cut, copy, or resize it on the page. Double-click on a note or text box to edit its text. Right-click on a selected annotation to change its status or properties.
 Note	Want to give yourself a reminder? Select the <b>Note</b> tool and add a resizable note much like a sticky note that you write on and then stick on paper documents. You can shrink the note to an icon. Right-click to access note properties. Double-click to re-open the note.
 Text Box	Adding a text label to your images is simple with the <b>Text</b> tool. Select this tool to enter text whose properties you can set in Edit, then Preferences and Comment.
 Highlight	Use the Highlighter tool to highlight selected text on the page or in a text box, just as you might use a highlighting pen on paper.
 Pencil	The Pencil tool lets you draw freehand lines on the page.
 Line	Select Line tool to draw straight lines; right-click and choose properties to make arrows and further format the line.
 Stamp	The Stamp tool lets you paste supplied stamps or bitmapped images of your choice on the page, much like using a rubber stamp.

## Protect items

In PaperPort Professional, you can adjust the security level of your PDF files (supported up to format 1.7). When you create a new PDF from existing ones (for example, by copying a thumbnail of a page onto a Workspace) its security settings will be the same as those of the original one. Newly created PDF files are generated according to the default PDF security settings in PaperPort, as specified on the Item ribbon.

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

## Filing items

A key to organizing items in PaperPort is filing items in appropriate folders. You can drag and drop items from one folder to another or from the PaperPort desktop into any folder you want. You can specify search criteria to help you find your items later.

Moving and copying items between folders is also possible in split view across Workspaces. The name of each item appears below the thumbnail in thumbnail view. In a multi-page item, the name appears below the individual page names.

Using the Folder Manager dialog box, you can add, remove, move, and rename PaperPort folders. You can change the color of a folder icon to one that helps you organize your items.

You may also add, remove, move, and rename any folder in Windows Explorer that is viewed with the PaperPort folder structure. These changes will be automatically reflected in PaperPort.

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

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

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

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

Folder Notes are added only if you check Automatically apply Folder Notes in the Output panel of the Scan Settings dialog box or (in PaperPort Professional for DesktopDelivery) in the Folder Properties dialog box.

In PaperPort Professional, you can quickly import a set of folders plus any content by listing them in a plain text file with precisely this structure:

```
*** PaperPort ***
Foldername1
Foldername2
Foldername2/subfoldername2a
Foldername2/subfoldername2b
Foldername3
```

Note how a top-level folder name must be listed in a separate line, with each of the desired sub-folders in a separate line.

Right-click in the Folders pane and choose Import Folder Structure to select the text file.

## Add search criteria to items

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

PaperPort also allows you to assign the same keywords to multiple items at the same time, providing a powerful tool for organizing and locating similar documents and images.

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

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

## Find items

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

When you have many folders and items, PaperPort provides more powerful capabilities with All-in-One Search. This provides many options for specifying where and what to look for when finding an item, including indexed text content. This information is referred to as search criteria.

You can look for items by:

- Item properties (File search)
- Text content (Index search)

## 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. When you search by item properties, turn off the Use All-in-One Search index check box, then specify criteria as follows:

- Name – item name (not necessarily that of the file).
- Author – as defined under Item properties.
- Keywords – as defined under Item properties.



- Comments – as defined under Subject under Item Properties.
- Annotations – Notes or text labels added to PDF files.
- URL – The link texts of captured web pages.

**Note** The Author, Keywords, Comments and URL are available for PDF or MAX files only. PaperPort 14 does not let you add metadata to MAX files; only metadata placed in an earlier version is available.

## Find words in an item

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

Specify search limits:

- all files in current folder but not its sub-folders
- current folder plus sub-folders
- all PaperPort folders and sub-folders.

Define search precision:

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

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

To filter search results using file information, turn on the relevant check boxes under Name, author, keywords and specify search text here as well.

## Add items to the All-in-One Search index

The All-in-One Search index uses PaperPort's OCR software to extract and copy textual content from your items, and creates a database of the words or phrases in those items, much like the index of a book. Item properties, such as name and author, are also added to the index. Although creating an index is time consuming, searching for items in the index may be much faster than searching file by file.

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

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

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

## Use the All-in-One Search pane

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

You can refine your search criteria by specifying the scope of the search in the Find box (1), defining where to look for the item or items in the Look in box (2) and choosing between Exact match and Approximate (3).

A file search is based on item properties only. You enter the item properties in the Name, author, keywords box (5).

An index search references PaperPort's All-in-One Search index to find item properties or actual text contained within an item. You enter the item properties in the Name, author, keywords box and the text content in the Containing indexed text box (4).

To do an index search without a file search, enter a string in the Containing indexed text edit box and clear all six file search checkmarks.

To do a file search without an index search, turn off the Utilize All-in-One index check box (7) and enter a string in the Name, author, keywords edit box, select as many of the six file search checkmarks (6) as desired.

To do a file and index search on a single search string, turn on Use All-in-One index, enter the string in the Containing indexed text edit box, make sure the Name, author, keywords edit box is empty and turn on as many file search checkmarks as desired. The search returns a list of all items that match the search string, either in file contents or file information.

To do a combined file and index search, turn on Use All-in-One index, enter a string in the Containing indexed text edit box, enter a string (same or different) in the Name, author, keywords edit box and turn on as many file search checkmarks as desired. The search returns a list of all items that contain the specified string or strings in both the file contents and the file information. In other words, you are likely to find few occurrences.

## Use PDF Searchable Image

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

You can create files in PDF Searchable Image format as follows:

- Open an item and choose Save As from its shortcut menu. Choose PDF Searchable Image as its file type.
- Scan an item using the profile Color Searchable PDF document.
- Import an image-only PDF into PDF Viewer Plus or Kofax Power PDF. It may offer to make a searchable copy; if not select Make Searchable PDF from the Tools menu.
- Print an image to the PaperPort desktop. By default it becomes an Image PDF. Go to Desktop, then Options and Item to specify Searchable PDF as your preference.

## Schedule indexing tasks

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





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

## Sharing files

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

These tools are built into the program and are readily available on different ribbons for quick access whenever you need them.

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

Icon	Description
	E-mail items to others, simply by dragging the items to your favorite e-mail program on the PaperPort Send To bar.
	Scan or convert items to the PDF format, the ever-popular file-sharing format considered by many as the industry standard for document distribution.
	Access shared folders located on your local or wide area network, by adding the folders to your PaperPort Folder pane.
	Access Sharing and Security settings directly from the folder shortcut menu.

With PaperPort, it is simple to set up a shared folder on a server, web storage sites, 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.

## Connecting to the Cloud

PaperPort 14 introduces support for Cloud computing accessing and working with web-based storage sites for programs, documents and data.

Evernote Connector is a new connector inside PaperPort 14, appearing as an icon on the Send To bar. This allows files to be dragged onto the icon so their copies are transferred to the Evernote storage site. Send To options can be used to specify access data.

## Send 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.

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

## Use OmniPage with PaperPort

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

With OmniPage you can:

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

## Customize the Send To bar

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

## Adjust Send To options

- You can tune Send To options to specify how you want to use a certain program on the Send To bar. For example, you can specify the file format in which PaperPort will save an item.
- To e-mail an item, simply drag and drop the item to your e-mail program on the Send To bar. Use the e-mail link options to specify the file format of the attachments and other options.
- If you have the professional version of OmniPage 16 or above on your system, use the Send To options for the OmniPage Workflows link to choose a workflow.

## Convert items

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

### Convert items to image formats

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

- The Save As command allows you to save image items to any of a variety of standard image formats including PDF, JPEG, and TIFF.
- The Duplicate Item command makes a copy of the item, conserving its original file type. You can convert text items and image items to PaperPort Image items (.max) using the Duplicate as PaperPort Image command.
- The Duplicate as PDF Item command allows you to convert text items to PDF Image items.

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

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

## Stacking documents

You can assemble a set of PDF files by stacking them into a single PDF. You can unstack the current page or all pages from a multi-page PDF file. When all pages are unstacked, the result is a set of single-page PDF files, uniquely identified by a set of numerical suffixes. When stacking and unstacking, the original PDF files or pages do not remain. To stack files, use drag-and-drop or select the desired files, right click and choose Stack. Similarly, use a shortcut menu to unstack a PDF file.

## Combining documents

You can assemble documents by combining them. The files to be combined need to be in a single folder and selected in the order you want them in the stack. Click the arrow next to Combine Items in the Stack group of the Item ribbon, and choose one of the combinations:

- Combine into PDF Stack: Each original page becomes one PDF page with no resizing.
- Combine into Multi-item PDF Pages, Resize to fit: This resizes the contributing items and always places four original pages onto a single PDF page.
- Combine into Multi-item PDF Pages, Maintain original sizes: This places as many original pages onto each PDF page as it can.
- Combine into Thumbnail PDF Page: This creates thumbnails of all item pages and fits as many as possible on a PDF page.

The original items remain in their original file types.

**Note** Combining usually takes more time than stacking because of PDF generation. PaperPort Professional can additionally combine text items. To convert a text item, the application that created it must be available on your system.

## Convert images to text

You can convert scanned documents to text by a simple drag-and-drop of the thumbnail to your word processor program. PaperPort automatically processes your scanned document using PaperPort's OCR software, launches your word processing program, and loads the scanned text into a document ready for editing. PaperPort also allows you to copy text from part of an image item for use in a text editing, word processing, or spreadsheet program. The OCR software processes the text and copies it to the Windows Clipboard. Open the program in which you want to insert the text, and use Paste to paste the text in a file.

## Filling forms

Active PDF forms can be filled using your PDF product. Choose the Hand tool and step through the form fields using Tab or arrow keys, making choices and entering texts. Help and the How-to-Guides list all the possible form control types.

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

You simply drag a form from the PaperPort desktop to the FormTyper program on the Send To bar. The form is converted to PDF if necessary and opened in your Kofax PDF product. FormTyper automatically analyzes the form, recognizes the blank areas in which data can be entered, and creates blank fields for the data. FormTyper can detect edit boxes and checkmarks.

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

If you have a pre-printed form, choose Form Fields Only in the Print dialog box to print your responses directly onto the form.

## PDF file support

### PDF flavors

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

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

### Opening PDF files

PaperPort can open and display PDF files of all three flavors. PDF files by default open in PDF Viewer Plus or in Kofax Power PDF.

The following further options are available in the Desktop panel of the Options dialog box:

- Image View (to apply image enhancement tools in a PaperPort window)
- ImageViewer (to apply these SET tools in a separate program window)
- Program associated with file type (your system application for PDF files)

Protected files can be accessed by giving the correct password. Security limitations are respected and can be changed if you can provide the Permissions password.

### **PDF page operations**

In PaperPort you can insert or append pages from one PDF file to another and also stack a set of PDF files into a single one. With pages of different flavors, the program determines a single flavor for the resulting file. You can unstack one or all pages from a multi-page PDF file to get one PDF per page.

### **Combining items into a PDF file**

You can combine a wide range of image items into a single target PDF. All combined items remain in their original locations and file types. In PaperPort Professional text items can also be combined.

### **Annotating PDF files**

You can add notes, highlights and graphic items like arrows to PDF pages of any flavor as annotations. These do not become part of the real PDF page, but exist on separate layers so they can be viewed, moved, changed or deleted in PaperPort or other PDF viewing and editing programs. Annotation can be done in ImageViewer or your PDF product.

### **Modifying PDF files**

Use SET tools to improve the appearance of PDF pages or prepare them for more successful text recognition (OCR). To modify the real text content in a PDF file, or change its color or attributes, you need a PDF editor such as Kofax Power PDF.

### **Extracting text from PDF files**

The Copy Text command finds text in PDF files and places it onto the Clipboard as plain text, running OCR if necessary. The command View Text does the same, but displays the text in a PaperPort window. You can choose to have these texts stored or not; if not it is regenerated each time the command is used. Send PDF files to word processor programs on the Send To bar. This delivers editable text with a defined level of formatting, using OCR if necessary.

### **Adding document information to PDF files for searching**

You can define an item name, author, subject and keywords to a PDF file and also assign page names to each page to help in searching.

The All-in-One search finds words in this document information for one or more PDF files. You can search through document information only, through text content only, or both, with different search strings for each search type. Indexing via the Index Manager makes full text searches much faster.

### **Saving PDF files to other file types**

You can save PDF files to a range of image file types and to XPS files. A multi-page PDF results in a single file when a multi-page file type is selected, otherwise each PDF page becomes a separate file.



### **Adding PDF files to Windows Desktop Search**

Go to **Desktop > Options > Advanced** to enable or disable PaperPort as the agent for handling PDF files in Windows Desktop Search.

## **Create PDF documents**

### **Create PDF Image files from other applications**

In **Desktop > Options > Items**, choose between PDF Image and PDF Searchable Image. Then open a source file in a suitable application and choose Print, typically from the File menu. Choose PaperPort Image Printer and make print settings, e.g. black-and-white versus color conversion.

### **Create PDF Searchable files from scanning**

Open a scanning profile and set the PDF file type in the Output panel or choose the supplied profile Color Searchable PDF Document.

### **Create a PDF from an existing PDF, XPS or image item**

Right-click on a PDF file and choose Duplicate Item, Duplicate Current Page or Save As. The flavor of a source PDF is retained for the copy. Right-click on an image item and choose Duplicate as PDF or Save As and choose PDF as file type. When you double-click an XPS file so that it opens in PDF Viewer Plus, a copy is automatically created as a PDF file, ready to be modified and saved.

## **Create PDF Documents with Power PDF Create**

Kofax Power PDF Create lets you create PDF files from one or more source documents. The PDF files will be viewable, printable, searchable and editable.

### **How to start PDF creation**

You can start PDF creation from different locations:

- from the Start menu through the Create Assistant
- from Windows Explorer or from your desktop using a shortcut menu
- from Microsoft Word, Excel, PowerPoint, Outlook or Internet Explorer using a toolbar or the Power PDF Create menu items or the Kofax PDF ribbon.

### **How to get help for PDF Create**

Kofax Power PDF Create has a comprehensive HTML Help system. Access it through the Help system in PDF Viewer Plus or Power PDF or through the Power PDF Create menu in Microsoft Word, Excel or PowerPoint. Press F1 to open Help at the topic describing the currently open panel. You can create one or more of these PDF flavors, depending upon your version of PaperPort software. Refer to the PaperPort Help for additional details. This table lists which features are available for creating each type of PDF in PaperPort 14 and PaperPort Professional 14:

Format	PaperPort 14	PaperPort Professional 14
PDF Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Searchable Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Formatted Text & Graphics (Normal PDF)	Scan or Get Photo	Scan or Get Photo Print to PaperPort Duplicate Item Duplicate as PDF

Web Capture must be run outside PaperPort.

Duplicate item transmits the PDF flavor of the original to the copy.

Duplicate as PDF accepts non-PDF files as input.

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.

## About ScanDirect

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

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

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

- A program on the ScanDirect Send To bar – Icons on the ScanDirect bar represent the programs that are linked to PaperPort and to ScanDirect. To scan and then send an item to a certain program, click the program icon, and then scan the item. ScanDirect will automatically start that program when the scan is complete.
- The PaperPort desktop – To scan and then work with the item in PaperPort, click the PaperPort icon, and then scan the item. When the scan is complete, PaperPort starts and displays the item in PaperPort. You can then use all of PaperPort's features on the item.

When ScanDirect is used to scan to other programs it always works through the scanner's own user interface; the scan profiles in PaperPort are not used. When ScanDirect is used to scan items to the PaperPort desktop, the output is determined by the output setting for the previous scan: if it created an

image item, the current scan will also do this, and if it created a text-type document (such as DOC, XLS, WPD, TXT or CSV) the current scan will create a PDF Image, which you can make searchable, as already described. In PaperPort Professional, you can scan items directly to Microsoft SharePoint.

## Uninstall PaperPort

For a full uninstallation, all PaperPort components should be removed one after the other. The components are as follows: Kofax Power PDF Create (only in PaperPort Professional), Kofax PDF Viewer Plus, PaperPort Image Printer, and Kofax PaperPort 14.

Removing only one or more of the following components: Image Printer, PDF Viewer Plus or Power PDF Create will cause PaperPort to function incorrectly.

For example (and not limited to the following functionalities): PDF Viewer affects FormTyper, Power PDF Create affects the save and combine to PDF functionality in PaperPort.

To uninstall PaperPort and its key components:

1. Go to **Control Panel**, then **Programs and Features**.
2. Select **Kofax PaperPort 14**.
3. Click **Remove** to uninstall the program.
4. Repeat this for the remaining components.
5. A computer restart is needed to complete the removal.

A deactivation step is performed at the start of uninstallation, allowing you to reinstall the program later without reactivation problems. Deactivation and reactivation require web access.

## Third party trademarks and credits

Outside In Viewer, copyright (c) 1991, 2010 Oracle. All rights reserved. Outside In Content Access, copyright (c) 1991, 2010 Oracle. All rights reserved. The word verification, spelling and hyphenation portions of this product, as detailed in the legal section of the Help system, are based in part on Proximity Linguistic Technology from Franklin Electronic Publishers, Inc. All rights reserved. This product was developed using Kakadu software, and is based in part on the work of the Independent JPEG Group. This software is based in part on the Zlib Compression Library and the work of Colosseum Builders.

This application was developed using LEADTOOLS, copyright (c) 1991-2007 LEAD Technologies, Inc. All rights reserved.

MSXML binary files. Use of the software is subject to the conditions and disclaimers contained in the MSDN CODE GALLERY BINARY LICENSE available at <http://code.msdn.microsoft.com/MSXML/Project/License.aspx>

Microsoft: HD Photo 1.0. Use of the software is subject to the conditions and disclaimers contained in the Microsoft Corporation Technical Documentation License Agreement for the specification "HD Photo" available at <http://msdn.microsoft.com/en-us/windows/hardware/gg463400.aspx>

Microsoft CAPICOM 2 - INSTALLATION AND USE RIGHTS. You may install and use any number of copies of the software on your devices running validly licensed copies of Windows.

FreeType 2.3.1. The FreeType Project is copyright (c) 1996-2000 by David Turner, Robert Wilhelm, and Werner Lemberg. All rights reserved except as specified in the license found at <http://freetype.sourceforge.net/index2.html>

Zlib. Source code files for Zlib were obtained by LICENSOR from Jean-loup Gailly and Mark Adler at [www.Zlib.net](http://www.Zlib.net). Copyright (c) 1995-2010 Jean-loup Gailly and Mark Adler. Use of Zlib is subject to the conditions and disclaimers contained in the license available at [http://www.zlib.net/zlib\\_license.html](http://www.zlib.net/zlib_license.html)

The Independent JPEG Group's software. Copyright (c) 1991-1998 by Thomas G. Lane. Use of the Independent JPEG Group's software is subject to the conditions and disclaimers contained in the license available at <http://www.xstandard.com/1D1B6C13-7BB6-4FA8-A1F9-EC1E32577D26/license-ijg.txt>.

JBIG2 license - Copyright (c) 1990, 1991, 1992, 1993 Cornell University. All Rights Reserved. Copyright (c) 1991, 1992 Xerox Corporation. All Rights Reserved. Use, reproduction, preparation of derivative works, and distribution of this software is permitted. Any copy of this software or of any derivative work must include both the above copyright notices of Cornell University and Xerox Corporation and this paragraph. Any distribution of this software or derivative works must comply with all applicable United States export control laws. This software is made available AS IS, and XEROX CORPORATION DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, AND NOTWITHSTANDING ANY OTHER PROVISION CONTAINED HEREIN, ANY LIABILITY FOR DAMAGES RESULTING FROM THE SOFTWARE OR ITS USE IS EXPRESSLY DISCLAIMED, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE) OR STRICT LIABILITY, EVEN IF XEROX CORPORATION IS ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Contributing Authors Group - Copyright (c) 1995 Alexander Lehmann. This software is provided 'as-is', without any express or implied warranty. In no event will the authors be held liable for any damages arising from the use of this software. Permission is granted to anyone to use this software for any purpose, including commercial applications (see below), and to alter it and redistribute it freely, subject to the following restrictions:

1. The origin of this software must not be misrepresented; you must not claim that you wrote the original software. If you use this software in a product, an acknowledgment in the product documentation would be appreciated but is not required.
2. Altered source versions must be plainly marked as such, and must not be misrepresented as being the original software.
3. This notice may not be removed or altered from any source distribution.
4. Binary only distributions of the software must include the file README with the copyright statement. You are welcome to add a copyright statement for your modifications and a contact address, though.

Apache Components. Copyright (c) 1999-2003. The Apache Software Foundation. All rights reserved. The following names may not be used to endorse or promote products derived from the Apache licensed software without prior written permission: Apache Cocoon, Apache Software Foundation, Ant, Jakarta, Apache Avalon, Avalon Excalibur, Avalon Framework, Batik, The Jakarta Project, Commons, FOP,

Apache POI, Jakarta-Regexp, Log4j, LogKit, Apache Lucene, Xalan, Tomcat, Struts, Velocity, Xerces, Axis, Jakarta-Oro, xml-commons, and WSIF. Products derived from this software may not be called "Apache", nor may "Apache" appear in the product name, without prior written permission. Software is further subject to the conditions and disclaimers listed in Apache Software License v.1.1. found at <http://www.apache.org>

Javascript Engine. Source code files for Mozilla's Firefox Browser contained in the Javascript Engine were obtained by LICENSOR from Mozilla.org. Such source code files have not been modified by LICENSOR. Use of the Javascript Engine by LICENSEE is subject to the conditions and disclaimers in the Mozilla Public License, Version 1.1 found at <http://www.mozilla.org/MPL/MPL-1.1.html>

LCMS. Marti Maria. Additional information is available at <http://www.littlecms.com> . Use of this software is subject to the conditions and disclaimers contained in the license available at <http://www.opensource.org/licenses/mit-license.php>

Mozilla Public License. Subject to the Mozilla Public License Version 1.1 (the "License"); these files may not be used except in compliance with the License. Javascript Engine. Source code files for Mozilla's Firefox Browser contained in the Javascript Engine were obtained by LICENSOR from Mozilla.org. Such source code files have not been modified by LICENSOR. Use of the Javascript Engine by LICENSEE is subject to the conditions and disclaimers in the Mozilla Public License, Version 1.1 found at <http://www.mozilla.org/MPL/MPL-1.1.html>

Copyright notice for the Evernote component Copyright (c) 2007-2009 by Evernote Corporation, All rights reserved. Use of the source code and binary libraries included in this package is permitted under the following terms: Redistribution and use in source and binary forms, with or without modification, are permitted provided that the following conditions are met: Redistributions of source code must retain the above copyright notice, this list of conditions and the following disclaimer. Redistributions in binary form must reproduce the above copyright notice, this list of conditions and the following disclaimer in the documentation and/or other materials provided with the distribution.

THIS SOFTWARE IS PROVIDED BY THE AUTHOR "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

All other trademarks referenced herein are the property of their respective owners.