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## CHAPTER 1

# Welcome to the PaperPort Software

Welcome to the PaperPort software. This guide explains how to use the main features of your PaperPort software. In addition to this guide, you can get more information from a variety of sources, as shown in this figure.

## EXPLORE PAPERPORT

**One-Minute Guide**

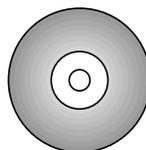
An online tour of PaperPort features.

**This Getting Started Guide**

The fastest way to get acquainted with PaperPort and start using it.

**Online Help**

Everything you want to know about PaperPort—“how-to” procedures, dialog box reference, and troubleshooting advice.

**PaperPort CD**

Your source for installing additional software that works with PaperPort and printing the documentation.

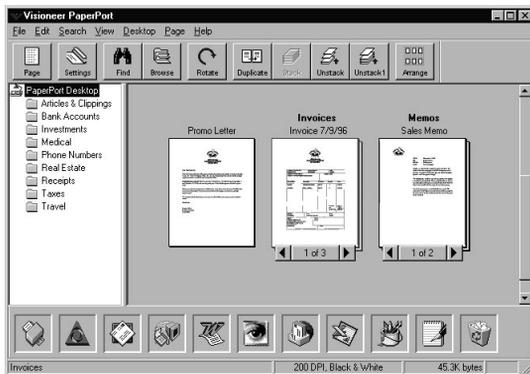
▼ **NOTE:** To see the One-Minute Guide and Online Help, you should first install the PaperPort 4.0 Software on your computer. See the installation guide that you received with your scanner to install the software.

This chapter of your *Getting Started Guide* provides a quick overview of PaperPort's features. If you've used an earlier version of the software, you can also read this chapter to see what's new in the PaperPort software.

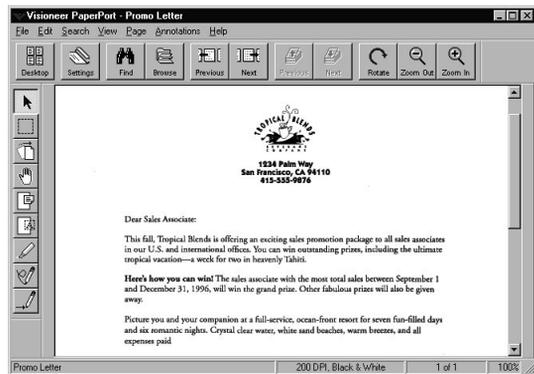
The whole idea behind the PaperPort software is to help you work more quickly and efficiently with paper items scanned into your computer. The next few pages show—at a glance—many of the time-saving features of the PaperPort software.

## VIEW SCANNED ITEMS TWO WAYS

PaperPort provides two ways to view items: the **Desktop View** and **Page View**. Desktop View displays a **thumbnail**, a small graphic that represents each item on the PaperPort Desktop. Page View displays a close-up of a single page.



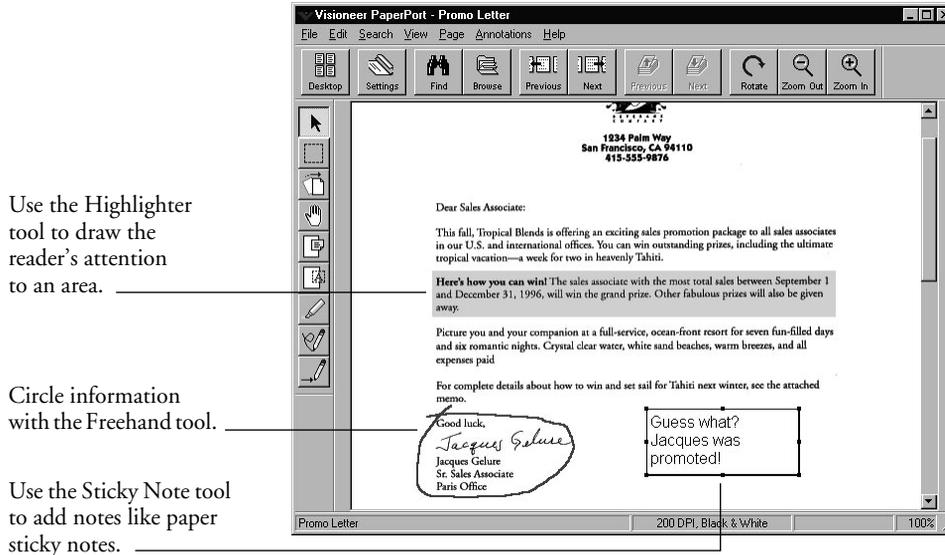
Desktop View displays items as thumbnails.



Page View displays each item as a full page.

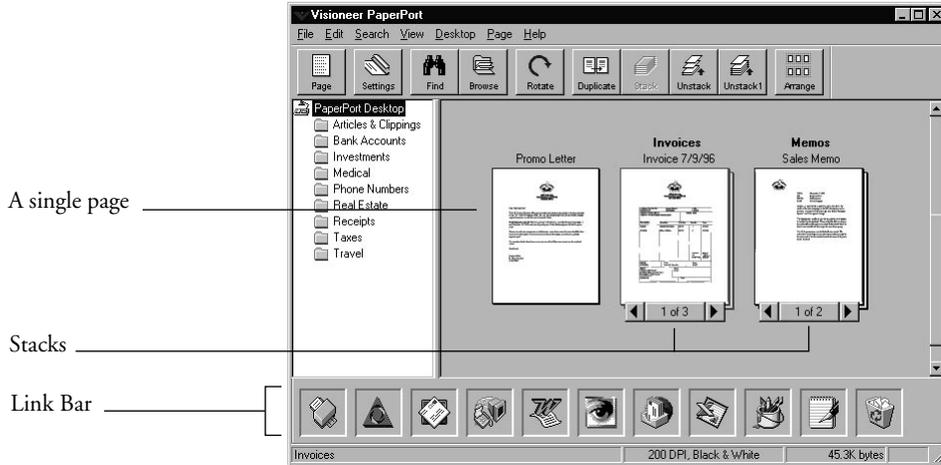
## ADD NOTES, HIGHLIGHT AREAS, AND MARK-UP A PAGE

With the annotation tools in Page View, you can add a sticky note, highlight text, draw lines or arrows, circle information, or paste a graphic from another application into a PaperPort item. The following figure shows a sample of how the tools can be used.



## COMBINE ITEMS INTO STACKS

Many items that you scan will probably be more than one page. You can combine the individual pages into a multipage item, called a **stack**. For example, you could save all of your invoices for a job in one stack named Invoices, and each page of the stack could be an invoice with its own name, such as Invoice 7/9/96.



## LINK TO MANY OTHER APPLICATIONS

PaperPort automatically recognizes many other applications on your computer and creates a “working link” to them. The Link Bar at the bottom of the Desktop View shows icons of those linked applications. To use a link, you drag an item onto one of the icons. Then, that link’s application starts, and you can use it with the scanned item. A typical use of the Link Bar is to scan an item and fax it.

This sample shows many different applications linked to PaperPort.



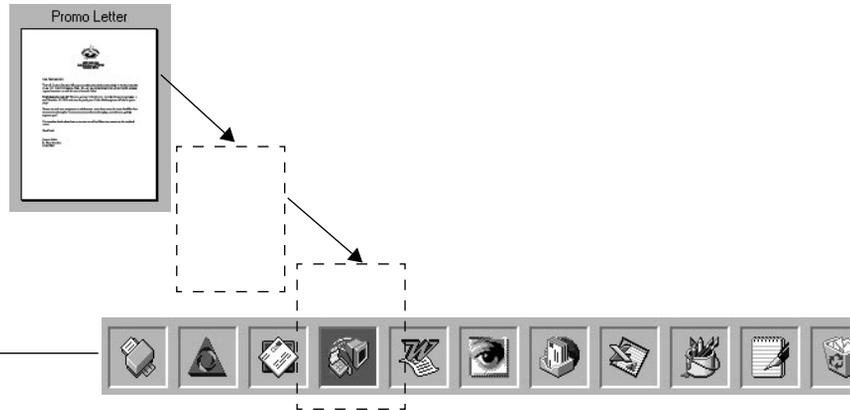
If PaperPort does not automatically recognize one of the applications on your computer, you can manually create a link using the Create New Link feature. See the Online Help for more information about creating links.

## SCAN IT AND FAX IT

If your computer has a fax modem and fax software, you can use the fax link to quickly send the item as a fax. The fax link is represented by a fax icon on the Link Bar at the bottom of the Desktop View.

Send an item by dragging and dropping it onto a link icon. This example shows dragging and dropping an item onto the fax link icon.

When the fax icon is highlighted, release the mouse button. Your fax application will start and you can send the item as a fax.



## SCAN IT AND E-MAIL IT

If you can send e-mail from your computer, you can send any scanned item as an e-mail attachment, including scanned pages, graphics, and photos. You can use either the e-mail link icon or a convenient Send command to attach an item to an e-mail message.

The e-mail link icon for Lotus cc:Mail.



## CONVERT SCANNED TEXT INTO TEXT THAT YOU CAN EDIT

PaperPort can quickly convert the text on a scanned item, (which is really just a picture of the text), into text that you can edit with a word processing application. The text is converted using either the optical character recognition (OCR) application provided with PaperPort, or your own OCR application if it's already on your computer. You can convert the entire item, or using the Copy As Text command, you can select only a portion of the text to convert.

A word processor link icon. Dragging an item onto it starts PaperPort's built-in OCR application, or you can use your own.



## SCAN TO GET THE BEST IMAGE

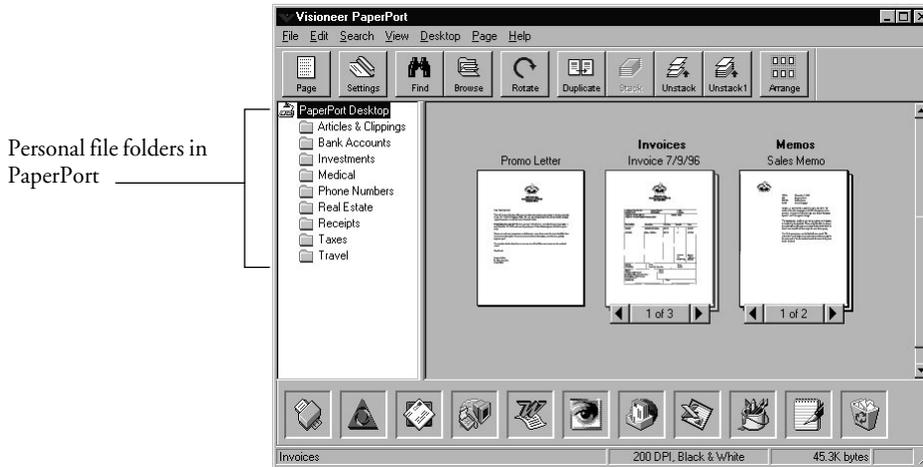
With the PaperPort software, you select a setting that is best for scanning a particular type of item. The software has scan settings for items that you want to fax or e-mail, file, convert to text, or for special items such as business cards, graphics, and photos. You can also customize the software's scan settings.

The following sample shows the Scan Settings dialog box.



## ORGANIZE ITEMS IN PERSONAL FOLDERS

PaperPort has an easy-to-use filing system for organizing your scanned items. The filing system consists of folders designed specifically for holding every item you scan. You can also rename folders to create your own set. To store scanned items in folders, you simply drag-and-drop the items onto the folder.



## IMPORT ITEMS FROM OTHER APPLICATIONS

In addition to scanning items, you can bring items into PaperPort in several different ways:

- Print to the PaperPort Desktop from another application, such as Microsoft Excel or Adobe Photoshop.
- Import files saved in other file formats, such as Windows Bitmap (BMP) or Tag Image File Format (TIFF).
- Drag and drop an image file onto the PaperPort folder in Windows Explorer and convert the file to a PaperPort item.
- Drag and drop an image file onto the PaperPort icon on the Windows Desktop.

## EXPORT ITEMS IN OTHER FORMATS

You can export or save PaperPort items in several popular file formats, such as BMP or TIFF. For example, after you scan a photograph, export it in PaperPort as a BMP file. You can open that BMP file in an application that reads BMP files.

## **VIEW PAPERPORT ITEMS ON AN IBM PC OR MACINTOSH**

PaperPort Viewer, a separate application, comes with PaperPort and lets others view PaperPort items without PaperPort. PaperPort Viewer is available for free on CompuServe, America Online, and the Visioneer web site at <http://www.Visioneer.com>. You can also send PaperPort Viewer to someone else by attaching it to an e-mail message.

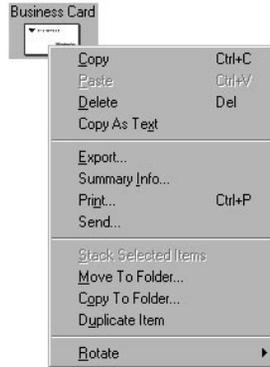
## **CUSTOMIZE PAPERPORT**

You can arrange PaperPort's tools to suit your individual style of working. For example, you can move the Command Bar to another part of the screen, hide the folders, display the Annotation Tool Bar vertically or horizontally, move it to the other side of the window, and so on. On the Link Bar, you can reorder the icons so the ones you use most often appear first, and you can hide the icons that you use infrequently.

## **RIGHT MOUSE BUTTON SHORTCUTS**

Many of the tools, buttons, and icons in PaperPort have right mouse button shortcuts. For example, select an item in Desktop View and click the right mouse button to display a menu of commands for the item.

You can choose from that menu instead of the menus at the top of the window. The following sample shows the shortcut menu for a single item in Desktop View.



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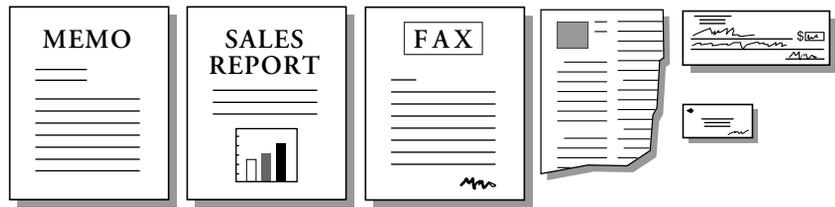
## RELATED TOPICS IN HELP

Each new PaperPort feature is described in detail in the Help system. From the PaperPort **Help** menu, choose **PaperPort Help Topics** to see the help file.

## CHAPTER 2

# Scanning Items

The PaperPort software works with a variety of scanners. Depending on the scanner you're using, you can scan small items, such as business cards, or larger items up to 30 inches (76.2 cm) long. Typical items include newspaper clippings, reports, magazine articles, brochures, letters, memos, receipts, canceled checks, business cards, and photos.



PaperPort has special scan settings for a variety of different items so you can get the best image with your scanner.

This chapter explains how to:

- Scan a page
- Adjust the paper return for different types of items
- Change scan settings

This chapter also explains why you don't have to save each scanned item manually.

## SCANNING A PAGE

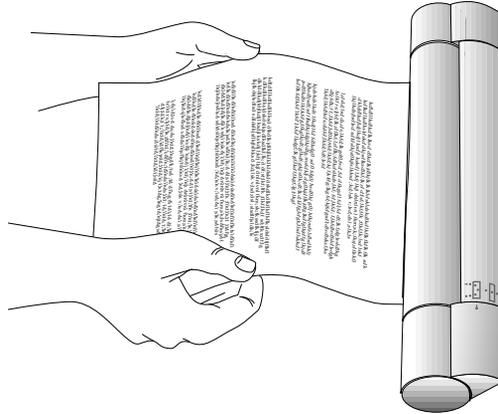
This section shows how to scan a page using a PaperPort scanner. If you are using the PaperPort software with another type of scanner, please see its user manual for instructions.

### To scan a page with a PaperPort scanner:

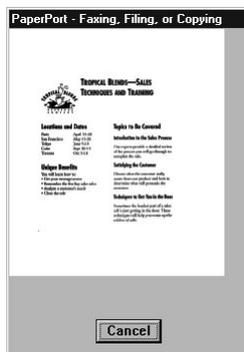
1. Insert the page, face up, into the front slot of the PaperPort scanner.

Use the page markers on the front slot to center the page.

2. Push the page forward until it stops and begins to curl upward.



After a slight pause, the feed mechanism pulls the page into the scanner; you do not need to push it through. As the page is being scanned, a preview appears on the screen.



The scanned page appears on the PaperPort Desktop.

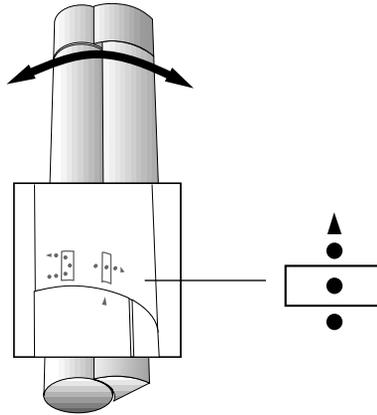
## SCANNING A BUSINESS CARD OR PHOTO

Because business cards and photographs are usually on heavier paper, you should set the scanner to feed the paper straight through the feed slot. In addition, the PaperPort software has special scan settings for reading the smaller print on business cards or for scanning photographs.

### To scan a business card or photo with a PaperPort scanner:

1. Rotate the scanner's Paper Return so it's set to scan straight through.

2. Align the marker on the scanner with the straight-through arrow.



3. Click Settings on the Command Bar, or from the Edit menu, choose Preferences.

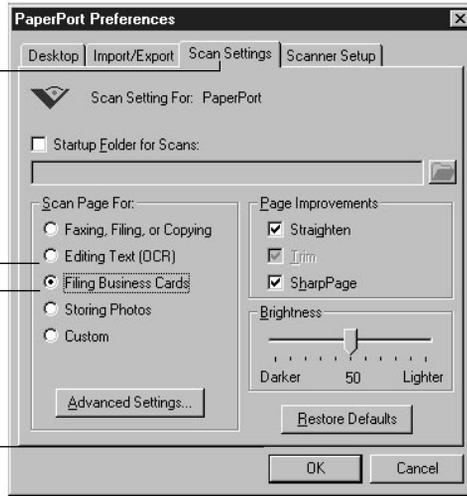


Make sure the Scan Settings tab is selected.

4. If you are scanning a business card, select the option, Filing Business Cards.

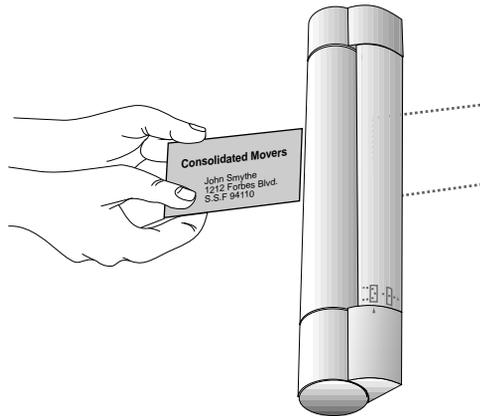
When scanning photos, select Storing Photos

5. Click OK.



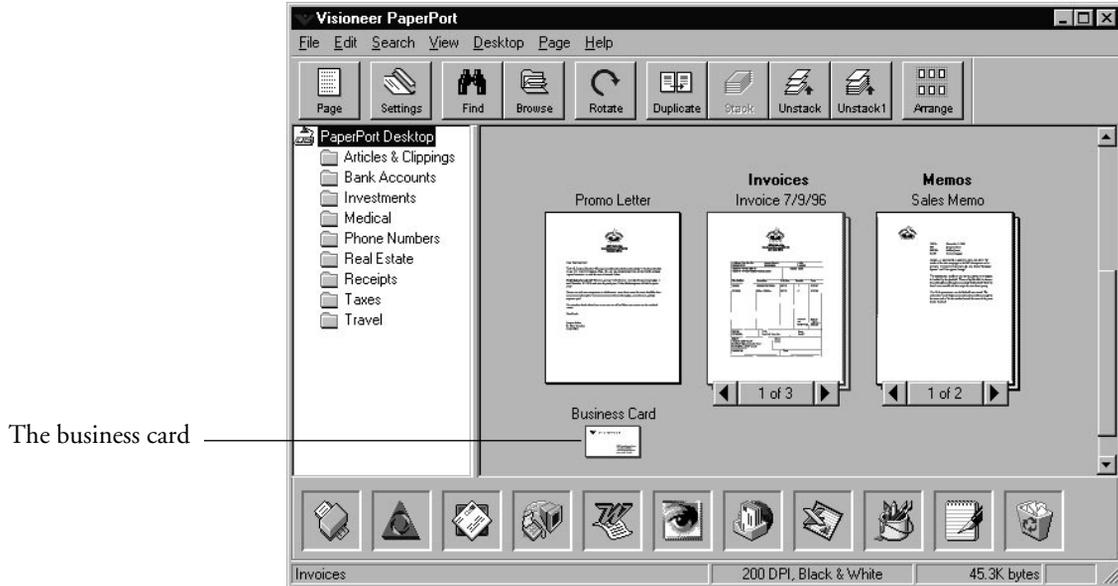
6. Insert the item, face up, into the front slot on the PaperPort scanner.

This example shows scanning a business card.



The card (or photo) feeds straight through the scanner, and a preview of the scan appears as the scanning progresses.

When scanning is complete, the item appears on the PaperPort Desktop.



Initially a newly-scanned item will be named “Untitled.” To give the item a title, see “Giving Titles to Items and Stacks” on page 30.

▼ **NOTE:** Remember to reset the scan settings if you will be scanning another type of item.

## WHY YOU DON'T NEED TO SAVE A SCANNED ITEM

Every item scanned into PaperPort is automatically saved as soon as you scan it. As long as you don't delete the item, you can “scan it and forget it” because the PaperPort software makes sure that the item is there when you need it. Any changes that you make to an item, such as adding a note or giving an item a new title, are automatically saved as well.

You can also save items in other formats using the Export command. You can use the Export command to save items:

- As backup copies
- If you want to delete an item from the PaperPort Desktop but use it later on
- In another file format, such as BMP or TIFF
- On a floppy disk



Besides the Export command, PaperPort has an archive link for creating a backup of selected files or for quickly backing up the entire PaperPort Desktop. See the Online Help for more information about using the archive link.



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#### **RELATED TOPICS IN HELP**

Use the Scanner

Work with Items on the PaperPort Desktop

Clean and Straighten Scanned Items

Print, Save, and Delete Items

Import and Export Files

## CHAPTER 3

# Viewing Items

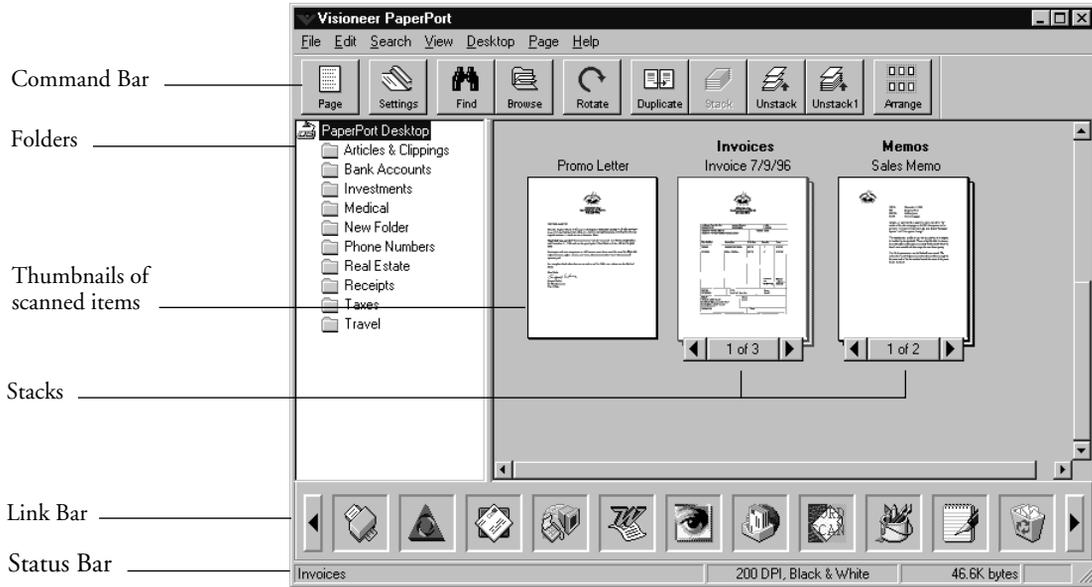
Using PaperPort's two views for displaying scanned items— Desktop View and Page View—you can see either the thumbnails of the items in a folder, or a full page that you can read.

This chapter explains the features of the:

- Desktop View
- Page View
- Command Bar in both views

## DESKTOP VIEW

Desktop View shows thumbnails of scanned items and stacks of items. Use Desktop View to see the items on the PaperPort Desktop or in any folder.



**Command Bar**—The buttons on the Command Bar are shortcuts for commands on the menus. For example, clicking the Settings button is the same as choosing Preferences from the Edit menu and then clicking the Scan Settings tab in the PaperPort Preferences dialog box. The Command Bar appears in both Desktop View and Page View.

**Folders**—You can store items in the folders to organize them. PaperPort comes with a set of folders already on the PaperPort Desktop, but you can change their titles, add new folders, and delete folders.

**Thumbnails of scanned items**—Thumbnails are small representations of scanned items so you can see them at a glance. To see an item at full size, use Page View.

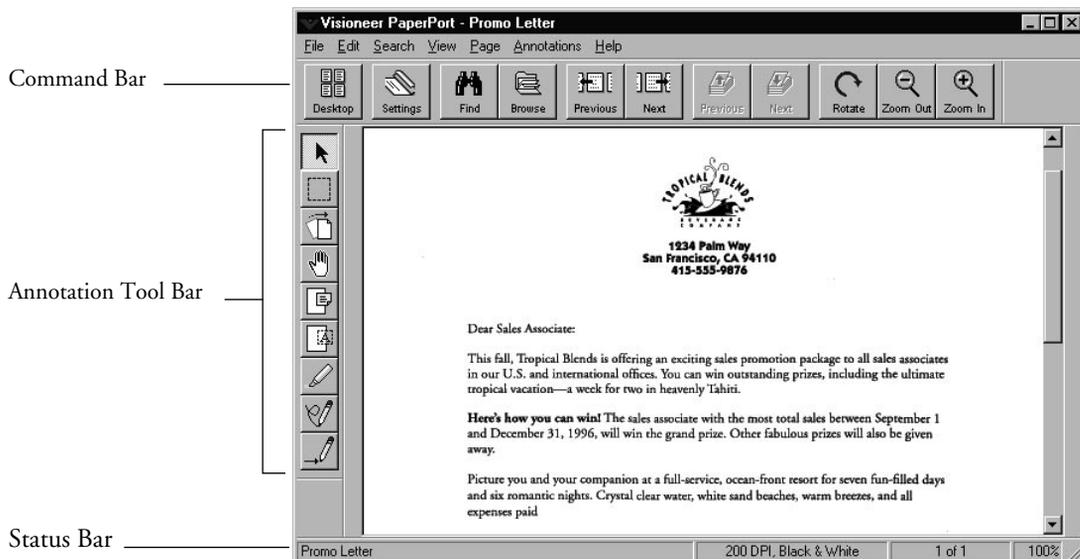
**A stack**—After scanning multiple pages, you can combine the thumbnails of those pages into a stack. For example, if you scan a 10-page report, 10 individual pages appear on the PaperPort Desktop. By combining the pages into a stack, you can work with the report as a single item. Stack titles appear in bold type above the page titles.

**Link Bar**—The icons on the Link Bar represent other applications and functions that work with PaperPort. The icons include links for sending a scanned item as a fax or an e-mail attachment, reading text from a scanned item into a word-processing program, and so on. The icons that appear depend on the applications on your computer. Use the scroll arrows on the Link Bar to see the other icons.

**Status Bar**—The Status Bar shows information about the selected items, the links, or the buttons on the Command Bar.

## PAGE VIEW

Page View shows one page at a time. Use Page View to get a close-up view of an item's information or to add comments to the page.



**Command Bar**—The buttons on the Command Bar are shortcuts for commands on the menus. Notice that some of the buttons in the Page View Command Bar are different than those in Desktop View.

**Annotation Tool Bar**—These tools are for adding notes to a page, highlighting areas on it, cutting and pasting sections, drawing on the page, and so forth. See Chapter 7, “Annotating a Page,” for examples of annotations, and how to use the tools.

**Status Bar**—The Status Bar shows information about the page being displayed.

## SWITCHING BETWEEN DESKTOP VIEW AND PAGE VIEW

While working with PaperPort, you’ll want to switch back and forth from Desktop View to Page View to work with a single page in Page View or with the thumbnails in Desktop View.

### To view an item in Page View:

1. Select (click) the item you want to see in Page View, such as a business card. \_\_\_\_\_



2. Click the Page button. \_\_\_\_\_



You can also just double-click the item to see it in Page View.

## To switch from Page View to Desktop View:

- Click the Desktop button.

You can also choose **Desktop View** from the View menu.



## USING THE COMMAND BAR IN DESKTOP VIEW

To use a button on the Command Bar, click it. If a button does not apply to a selected item, it will be gray, and clicking it won't have any affect.



**Desktop.** Switch from Page View to Desktop View.



**Page.** Switch from Desktop View to Page View.



**Settings.** Displays the PaperPort Preferences dialog box where you can set the scan settings, customize the PaperPort Desktop and folders, choose options for importing and exporting files, calibrate the scanner, and change its hardware settings.



**Find.** Find an item in Desktop View, or find an annotation in Page View.



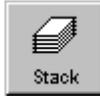
**Browse.** In Desktop View, see a list of items available on the PaperPort Desktop and in all of the folders. In Page View, see a list of items available in the currently open folder.



**Rotate.** Rotate the selected item or page 90 degrees to the right.



**Duplicate.** Make a copy of the selected item(s).



**Stack.** Combine selected items into one stack.



**Unstack.** Unstack the pages of the selected stack.



**Unstack1.** Unstack only the visible (top) page of the stack. The rest of the pages remain as part of the stack.



**Arrange.** Arrange the items on the PaperPort Desktop.

## USING THE COMMAND BAR IN PAGE VIEW

Several of the buttons that appear in Desktop View also appear in Page View. Because Page View displays a single item, buttons for viewing single items only appear in the Page View Command Bar.



**Previous.** Displays the previous item on the PaperPort Desktop, or in the currently open folder.



**Next.** Displays the next item on the PaperPort Desktop or in the currently open folder.



**Previous.** Displays the previous page in a stack.



**Next.** Displays the next page in a stack.



**Zoom Out.** Reduces the size of the page in Page View.



**Zoom In.** Magnifies the size of the page in Page View.



▼ **NOTE:** Two other buttons may appear on the Command Bar. A Scan button appears if you are using the PaperPort software with a flatbed or other scanner. Clicking the Scan button starts the scanning on the scanner. The other button that can appear on the Command Bar is labeled OLE Return. It appears when you are using Windows Object Linking and Embedding (OLE).



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#### RELATED TOPICS IN HELP

Work with PaperPort Desktop Features

Work with Items on the PaperPort Desktop

Work with Items in Page View

Use OLE with PaperPort



## CHAPTER 4

# Stacking Items

Like many other busy people, you may sometimes put items on your desk without organizing them. When you finally do put them in order, you might stack the items by project, contact, or department. You use a method that helps you to quickly find the stack you need.

With PaperPort you can electronically organize items into stacks in much the same way that you do with paper documents. A **stack** is a PaperPort item with multiple pages. Expense reports, contracts, memos, letters, presentations, and other business materials are often two or more pages. You can stack and unstack these items electronically on the PaperPort Desktop.

## COMBINING ITEMS INTO STACKS

Each scanned page appears on the PaperPort Desktop as a one-page untitled item. To stack scanned pages, you can:

- Drag one page on top of the other
- Click the Stack button on the Command Bar
- Use the stack commands on the Desktop menu

You can also add stacks to other stacks.

## USING DRAG AND DROP TO CREATE STACKS

1. In the Desktop View, select the item that you want to stack.

This example shows stacking a Cover Letter on an Invoice.

Cover Letter



Invoice

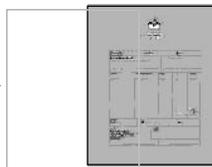


2. Drag the selected item onto the item on which you want to stack it.

Cover Letter



Invoice



3. When the second item is highlighted, release the mouse button.

The stack is created.

**Invoice**  
Cover Letter



4. Repeat steps 1 through 3 until you finish creating the stack.

A new stack receives the title of the item on the bottom of the stack. The stack title (Invoice in this case) is shown in boldface type. Each page title is shown in normal typeface (Cover Letter in the sample).

Any item on the PaperPort Desktop can be stacked onto any other item. You can use drag-and-drop to stack pages onto other pages, stacks onto other stacks, pages onto stacks, and stacks onto pages. You can also use the Stack button on the Command Bar to stack items. Select items in the order that you want them stacked and click the Stack button.

## SELECTING AND DESELECTING ITEMS

When stacking items you need to select them. You can select one item at a time, or several items together.

### To select or deselect a single item:

- To select the item, click its thumbnail in Desktop View. A red (or dark) line around an item indicates that it is selected.
- To deselect the item, click another item, or click anywhere else in Desktop View.

### To select multiple items:

- Click each thumbnail while holding down the **Shift** key or the **Ctrl** key.

Or

- Click an empty space on the PaperPort Desktop, then drag the mouse around the items that you want to select. Any item that is partially enclosed in the box, or that the box even touches, will be selected. Release the mouse button when the items you want are selected.

## MOVING BETWEEN STACKED PAGES

The Page Navigators are the buttons for “flipping” through the pages of a stack. You can also use the commands on the Page menu to move from page to page in a stack.

**To move between pages in a stack in Desktop View:**

1. Select the stack.
2. Click the left arrow of the Page Navigator to see the previous page in the stack.
3. Click the right arrow of the Page Navigator to see the next page in the stack.



You can also move between pages by choosing the Page menu commands: First Page, Last Page, Previous Page, and Next Page. Or use the Go To Page command from the Page menu to move directly to any page in the stack. Clicking the middle of the Page Navigator (it says 1 of 2 in the sample above) is a shortcut for choosing the Go To Page command.

**To move between pages in a stack in Page View:**

1. Display the stack in Page View.
2. Click the Previous or Next button.



You can also use the commands on the Page menu to move between pages in Page View.

**UNSTACKING ITEMS**

You can unstack pages in a stack if, for example, you want to move those pages to another stack, replace those pages with new ones, or delete them from the stack without disturbing the rest of the pages. You unstack pages in Desktop View.

### To unstack a single page:

1. Select the stack in Desktop View.
2. Click the Page Navigator to display the page you want to unstack.



3. Click the Unstack1 button.



You can also choose **Unstack Current Page** from the **Desktop** menu.

### To unstack all of the pages in a stack:

1. Select the stack in Desktop View.



2. Click the Unstack button.



You can also choose **Unstack** from the **Desktop** menu.

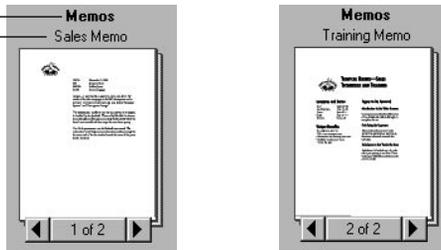
Each page of the stack becomes a separate item on the PaperPort Desktop.

## GIVING TITLES TO ITEMS AND STACKS

When you first scan an item, it is Untitled, but you can give it a title up to 30 characters long, such as Smithers Contract or Letter to Dr. Adams. The more descriptive the title, the easier it is to quickly find the item you want. You can also give titles to stacks to help identify them.

The stack title and page titles both appear above the stack so that, as you flip through the pages of a stack, you can see each page's title as well as the stack title.

The stack title is in boldface type. The page title is in normal type. As you flip through the pages, each page's title appears.



If you don't want to see page titles with the stack titles, choose Per-Page Titles from the View menu.

### To give an item or stack a title in Desktop View:

1. Select the item or stack.
2. Click its title, or choose **Change Title** from the File menu.
3. Type the new title and press **Enter**.



To change a title in Page View, choose Change Title from the File menu.



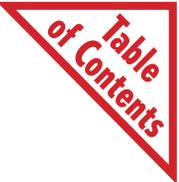
---

**RELATED TOPICS IN HELP**

Work with Items on the PaperPort Desktop

Create and Work with Stacks

Work with Items in Page View



## CHAPTER 5

# Sending a Fax or E-Mail Message

After an item has been scanned into PaperPort, you can send it as a fax, or as an attachment to an e-mail message. You do not need to print the item first; you can send it directly from the PaperPort Desktop without worrying about paper jams when faxing.

If you want to add some notes to a fax, but don't want to mark up the original, you can annotate the item using PaperPort's annotation tools. The annotations can be "turned off" before the item is sent, in case you don't want someone to see your comments on it. See Chapter 7, "Annotating a Page," for the steps to create annotations and to display or hide them.

## OVERVIEW

The PaperPort software has several ways to send a fax or e-mail:

- Select an item and drag it onto the fax or e-mail link icon
- Select an item and click the fax or e-mail link icon
- Choose the fax or e-mail application from the Links menu on the File menu

## SENDING A SCANNED ITEM AS A FAX

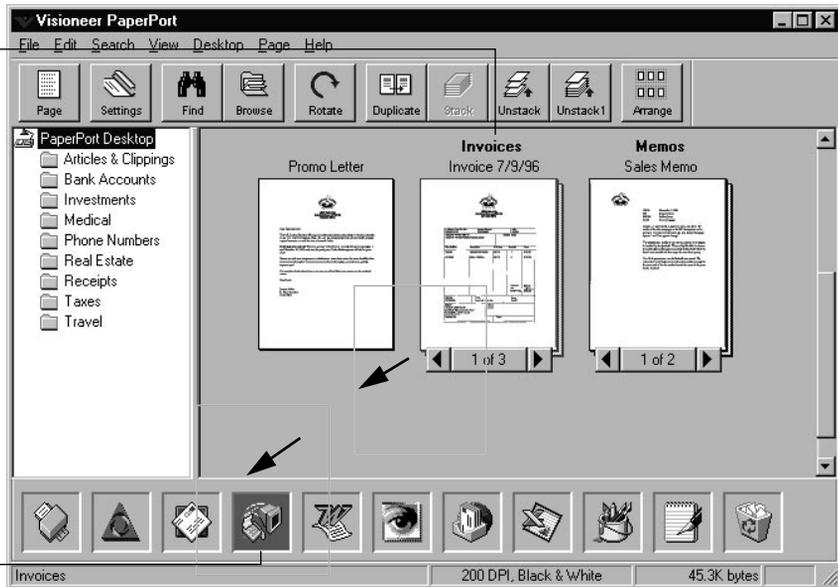
To send scanned items as faxes, your computer will need:

- A fax modem
- Fax software

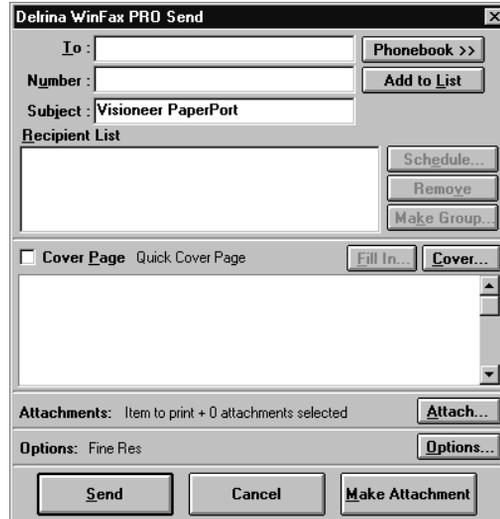
To send a scanned item as a fax from Desktop View:

1. Select the item to fax.
2. Drag the item onto the fax link icon on the Link Bar.  
You can also click the fax link icon.

3. When the fax link icon is highlighted, release the mouse button.



- When your fax software starts, send the scanned item as a fax.

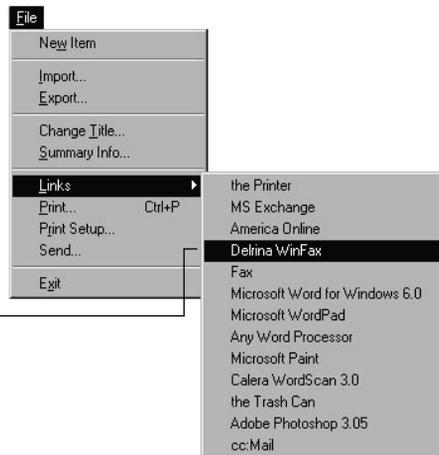


This sample shows the Delrina WinFax PRO window for sending a fax. The window that appears on your computer will be for your fax software.

- ▼ **NOTE:** Instead of using the fax link icon, you can also choose Links from the File menu, and then choose the name of your fax software.

### To send a scanned item as a fax from Page View:

- Display the item in Page View that you want to fax.
- From the File menu, choose Links.
- Choose the name of your fax software.
- The fax software starts and you can send the item.



- ▼ **NOTE:** In the sample, the name of the fax software is Delrina WinFax. Note that an option named Fax is also listed. That option is for fax software that isn't listed by name on the menu, or whose icon does not appear on the Link Bar.

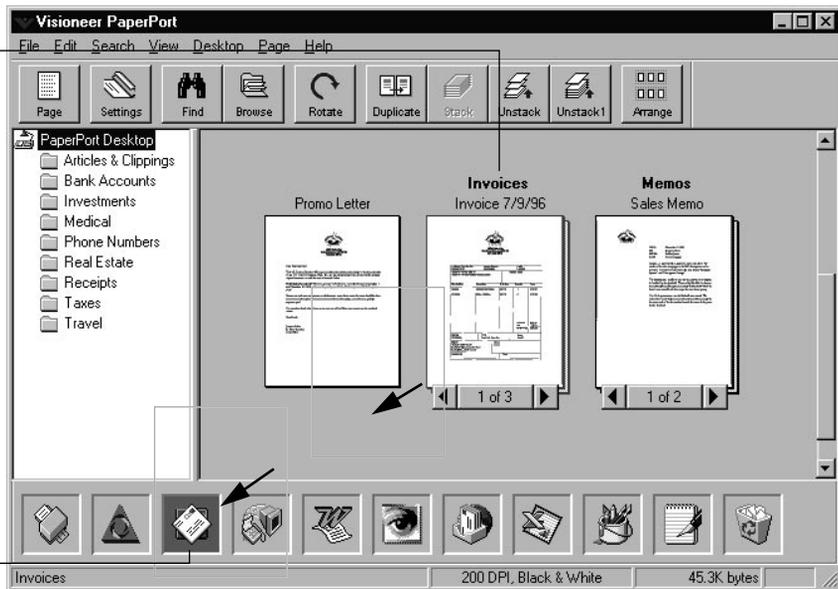
## SENDING A SCANNED ITEM WITH AN E-MAIL MESSAGE

To send items as attachments to e-mail messages, your computer will need:

- An e-mail account (typically over a network, or modem)
- E-mail software

**To send a scanned item as an e-mail attachment from Desktop View:**

1. Select the item to send.
2. Drag the item onto the e-mail link icon on the Link Bar.  
  
You can also click the e-mail link icon.
3. When the e-mail link icon is highlighted, release the mouse button.



4. When your e-mail software opens, log in and then send the scanned item as an attachment to an e-mail message.

This sample shows the login window for Lotus cc:Mail. The login window that appears on your computer will be for your e-mail software.

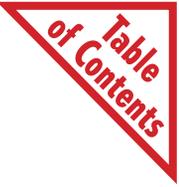
- ▼ **NOTE:** Instead of using the link icons, you can also choose Links from the File menu, and then choose the name of your e-mail software. The software will open and you can send the item as an attachment to an e-mail message.

To send a scanned item as an e-mail attachment from Page View, choose Links from the File menu and then choose the name of your e-mail application.



## RELATED TOPICS IN HELP

- Fax an Item
- Send an Item as an E-Mail Message
- Manage and Use Other Links



## CHAPTER 6

# Converting a Scanned Item to Text

A scanned item is an image. Even the text on a scanned item is simply a picture of the text, and you can't edit it as you would text in a word processing document. Using optical character recognition (OCR) software, the PaperPort software can convert those text "pictures" into real text that you can then edit using a word processing application.

The PaperPort software includes OCR software so you can convert scanned items without having to buy your own OCR software. After scanning an item, you can simply "OCR it" and then work with the converted text in your word processing application.

If you already own OCR software, you can use either it or PaperPort's built-in OCR software to convert scanned items.

## WHAT IS OCR?

OCR is the computer's way of recognizing that a picture of an "S" is really the letter S, that the picture of a "W" is really the letter W, and so on for each letter's picture in a scanned item.

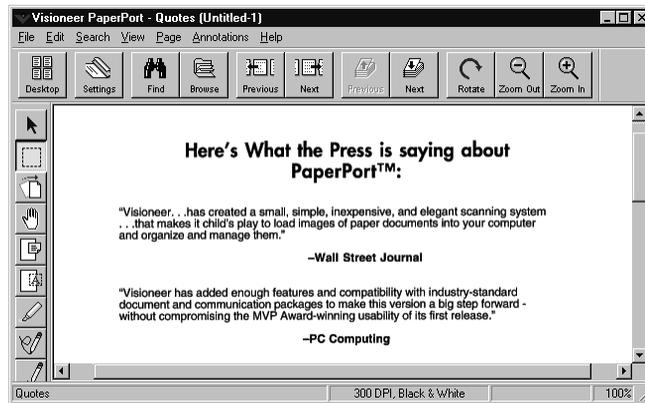
The OCR software looks at each letter on a page and, if it recognizes the letter's shape, converts it into the appropriate text character. When the analysis of the page is complete, the OCR software puts the text characters onto a page in about the same format as the pictures of text on the original scanned item. The page is now a word processing

document containing text that word processing applications can recognize. You can then edit the text, format it, cut and paste it, and so on as you would normally when word processing.

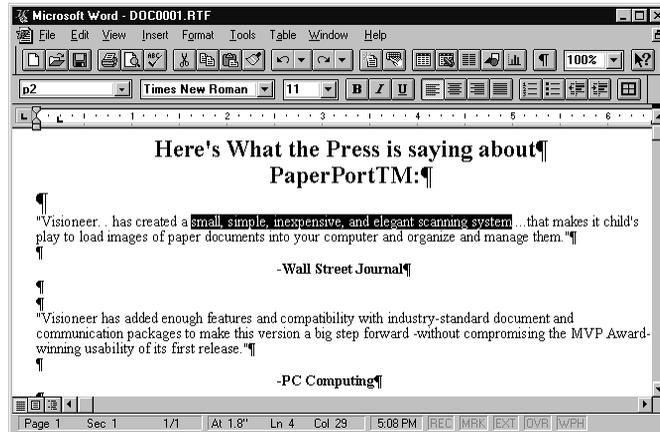
The process is not always perfect. If the scanned item contains smudges or hand-written notes, the OCR application will try to analyze them but, of course, won't be able to come up with a suitable match. For that reason you should always try to scan clean copies when planning to use PaperPort's OCR feature. Also, you should carefully check the converted document to correct any mistakes that the OCR application made.

Here's an example:

The scanned words on this page are not text. The words are pictures of text, and can't be edited in a word processing application. For example, if you tried to select a line of text to reformat it, you couldn't.



After being processed with the OCR software, the pictures of the text are now "real" text that a word processing program recognizes. You can select text, as shown here, to edit it. This example shows how the converted text would appear in Microsoft Word.



## CONVERTING AN ITEM TO TEXT

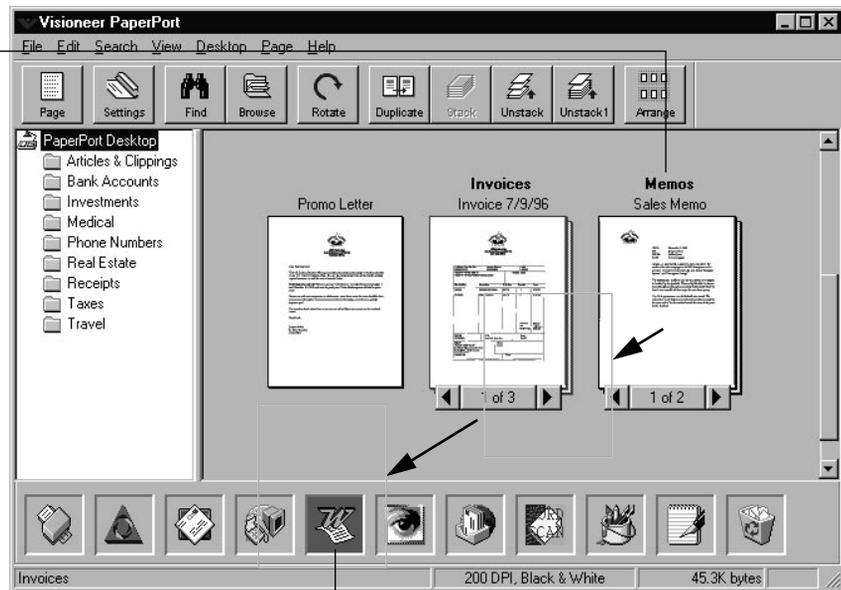
To convert an item to text, you first scan it into PaperPort. You can use OCR to convert text from either Desktop View or Page View.

### To convert an item from Desktop View:

1. Select the item to convert. It can be a single page or a stack.
2. Drag the item onto the word processing link icon on the Link Bar.

You can also just click the word processing link icon.

3. When the word processing link icon is highlighted, release the mouse button.

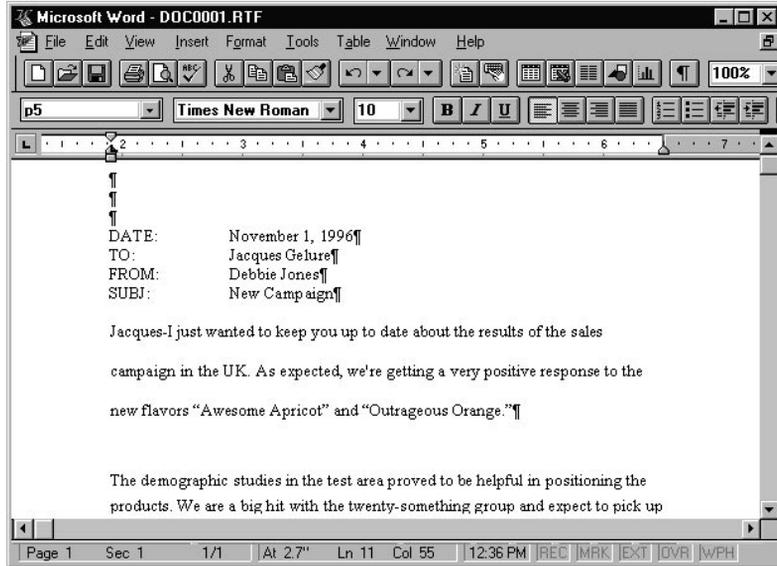


▼ **NOTE:** This sample shows the steps for using the OCR software that you received with PaperPort, and sending the converted text directly to a word processing application. If you have other OCR software on your computer, you send the text to it instead. You can also configure the word processing link to send text to the other OCR application.

If the item is a stack, all pages are converted. To convert a single page of a stack, use the Unstack1 button on the Command Bar to unstack the page first, and then convert it.

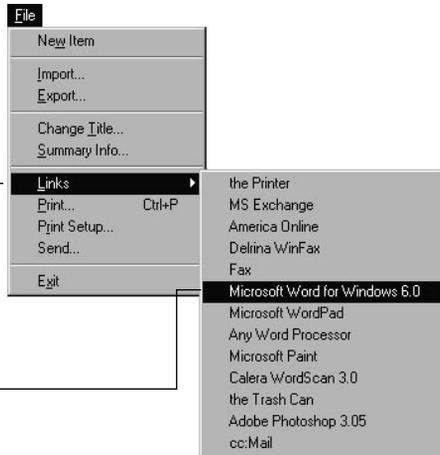
Instead of using the word processing link icon, you can also choose Links from the File menu, and then choose the name of your word processing software. The conversion process will begin.

- When the conversion is complete, the word processing application opens, and you can begin editing the text.



**To convert an item from Page View:**

- Display the item in Page View that you want to convert.
- From the File menu, choose Links.
- Choose the name of your word processing software.



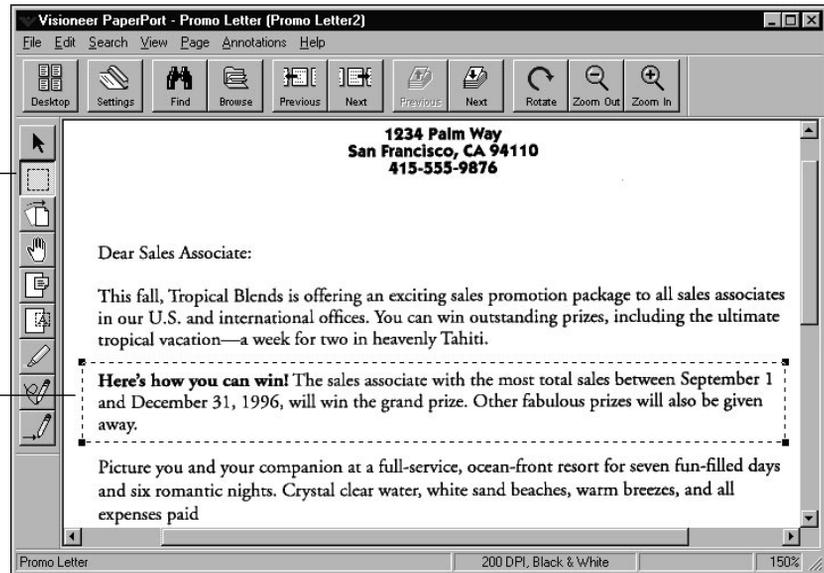
The OCR conversion begins. If the item is a stack, all of its pages are converted. To convert a single page of a stack, unstack that page from the stack first, then convert it.

## CONVERTING PART OF A PAGE TO TEXT

If a page includes graphics and you convert it, the OCR software will try to convert the graphics to text. The result will be a lot of unrecognized characters on the page because the software can't match text characters with graphics. In that case, select those portions of the page that contain only text, and convert that selected area.

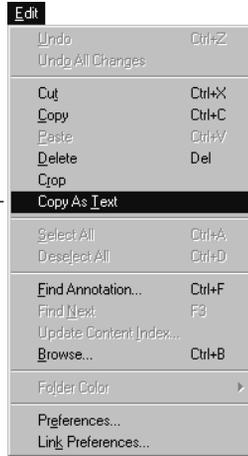
### To convert part of a page to text:

1. Display the page in Page View.
2. Click the Selection tool on the Annotation Tool Bar.
3. Drag around the portion of text you want to convert.



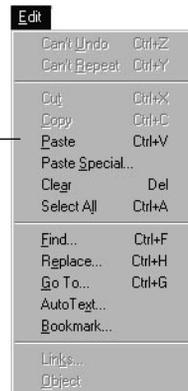
4. From the **Edit** menu, choose **Copy As Text**.

The conversion begins. When conversion is complete, the selected text is copied to the Clipboard.



5. Open the application where you want to paste the text and choose **Paste** from that application's **Edit** menu.

This example is from Microsoft Word.



## CONVERTING A SCANNED SPREADSHEET

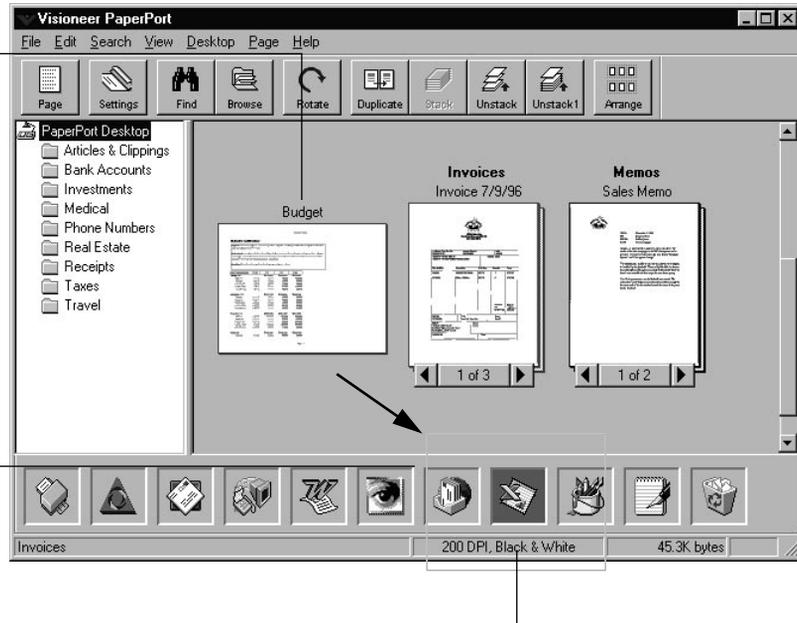
The process to convert a scanned spreadsheet is similar to converting a page of text. In most cases the spreadsheet will retain its columnar format, and the spreadsheet application will recognize number characters as numbers if you want to update them.

## To convert a spreadsheet from Desktop View:

1. Select the spreadsheet to convert. It can be a single spreadsheet or a stack.
2. Drag the item onto the spreadsheet link icon on the Link Bar.

You can also click the spreadsheet link icon.

3. When the spreadsheet link icon is highlighted, release the mouse button.



This sample shows Microsoft Excel as your spreadsheet application, but you could drag the spreadsheet onto any other spreadsheet icon on the Link Bar.

Instead of using the spreadsheet link icon, you can also choose Links from the File menu, and then choose the name of your spreadsheet application.

4. When the conversion is complete, the spreadsheet application opens and you can begin editing its text and numbers.

	F	G	H	I	J	K	L	M
4	8/86	Q1	9/86	10/86	11/86	Q2	S1	12/86
5	\$28,675	\$85,525	\$28,675	\$29,575	\$31,875	\$90,125	\$175,650	\$31,675
6	10000	30000	10000	10000	13000	33000	63000	1200
7	3000	8500	2500	3000	2500	8000	16500	330
8	4575	13725	4575	4575	4575	13725	27450	457
9	9600	28800	9600	9600	9600	28800	57600	960
10	1500	4500	2000	2400	2200	6600	11100	220
11								
12	\$28,200	\$84,600	\$28,200	\$23,400	\$25,900	\$77,500	\$162,100	\$22,900
13	7500	22500	7500	7500	10000	25000	47500	750
14	2000	6000	2000	2000	2000	6000	12000	200
15	8000	24000	8000	2700	2700	13400	37400	270
16	8200	24600	8200	8200	8200	24600	49200	820
17	2500	7500	2500	3000	3000	8500	16000	250

To convert a spreadsheet in Page View, use the steps on page 42 that explain how to convert an item from Page View, except choose the name of the spreadsheet application instead of the word processing application.



## RELATED TOPICS IN HELP

Work with Items on the PaperPort Desktop

Work with Items in Page View

Convert an Item to Text

## CHAPTER 7

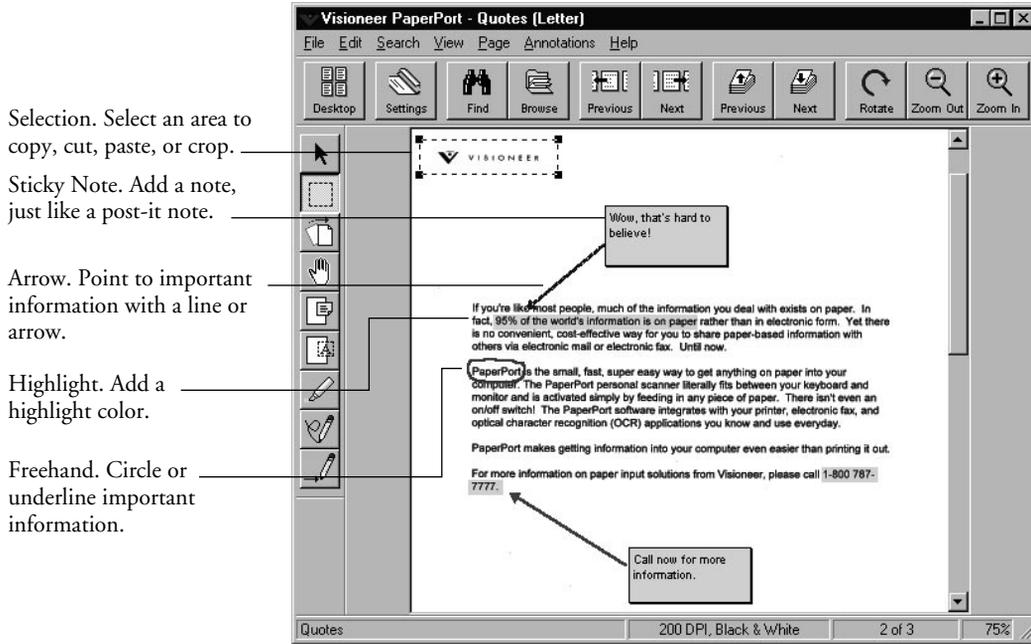
# Annotating a Page

To communicate well, you need to draw the reader's attention to important information. When working with paper, you can highlight text with highlighter markers, add post-it notes, and circle text with a pen or pencil. With PaperPort, you can use these methods, but in electronic form.

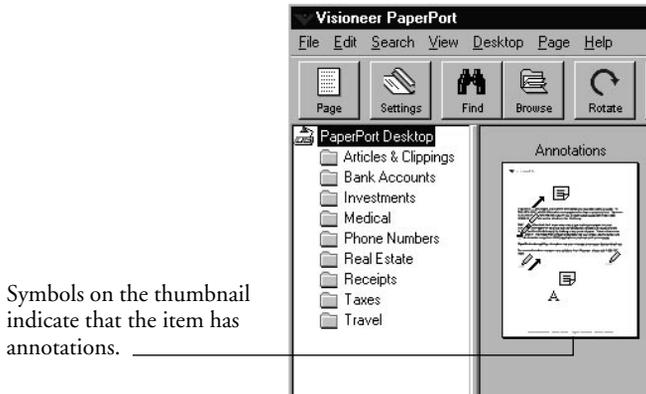
This chapter shows how to:

- Select, move, and resize annotations
- Cut, copy, paste, and crop sections of a page
- Straighten a page that was originally scanned at an angle
- Scroll quickly
- Write notes on a page
- Highlight sections of a page
- Draw lines and arrows
- Display and hide annotations
- Print items

Here is an example of a page with some annotations on it.



You can also tell if an item in Desktop View contains annotations because they appear as small symbols on the thumbnail.

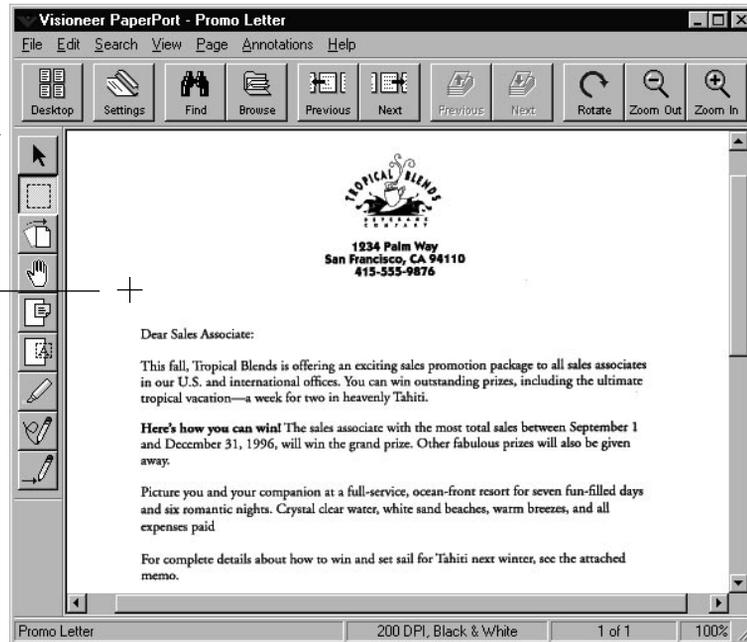


## USING THE ANNOTATION TOOLS

The basic method to use the annotation tools is similar for each tool.

### To use an annotation tool:

1. Click the tool on the Annotation Tool Bar.
2. Place the cursor on the page. Its shape will indicate the tool you selected.
3. Depending on the tool you selected, click or drag the cursor to use the tool.



## TOOL SAMPLES

The following examples show how to use the annotation tools.

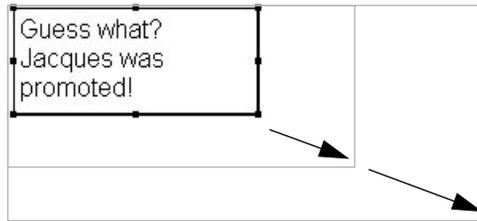
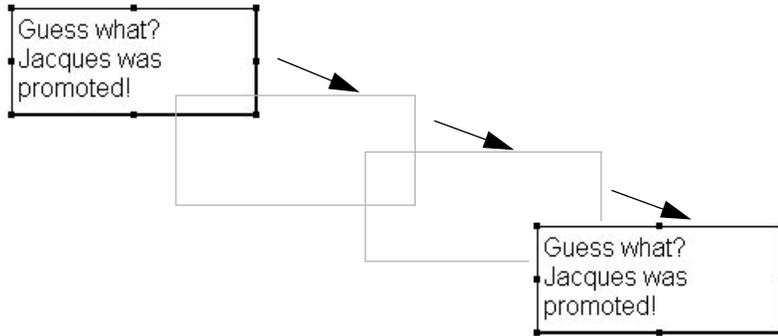


### POINTER

Use the Pointer tool to select annotations on a page. Annotations must be selected to move, resize, or edit them.

**To use the Pointer tool to move, resize, or edit an annotation:**

1. Click an annotation to select it.
2. To move the annotation, put the pointer inside the selected area, and drag the annotation to a new place.
3. To resize the annotation, put the pointer on one of the selection boxes, hold down the mouse button and drag the pointer.
4. To edit the text in an annotation, double-click the annotation. The cursor is at the start of the text.

**SELECTION**

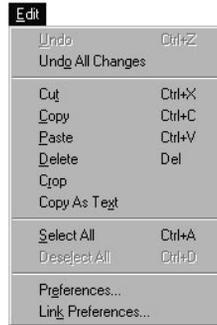
Use the Selection tool to select an area to crop, cut, copy and paste, such as a graphic for use in another application, or your signature for use on a form letter.

## To use the Selection tool:

1. Drag to select an area of the page.



2. Depending on what you want to do with the selection, choose **Copy**, **Cut**, **Delete**, or **Copy As Text** from the **Edit** menu.



3. To paste the selection to another document, open it, and choose **Paste** from the **Edit** menu.

- ▼ **TIP:** Use this process to copy your signature onto letters. Then you can fax a signed copy of your letters directly from your computer without having to print the letter, sign it, and then re-scan it (or send it from a fax machine).

## CUT AND PASTE OPTIONS

You can copy (or cut) and paste to and from pages and applications in several different combinations:

- *From one page to another in Page View.* The copied image is pasted onto the receiving page; you can then move the image into place.
- *From Page View to the PaperPort Desktop.* A new item is created on the PaperPort Desktop with the copied image on it.
- *From Page View to another application.* The copied image appears on the page in that application; you can then move that image to its correct position in that application.

- *From another application to PaperPort.* If the copied image is a graphic, pasting it to the PaperPort Desktop creates a new item with the image on it. Pasting to the Page View puts that image on the page being displayed. If the copied material is text, it can be pasted to a PaperPort sticky note or mark-up note, but copied text cannot be pasted directly to a thumbnail on the PaperPort Desktop.

- ▼ **NOTE:** Another copy and paste option is the Copy As Text command in the Edit menu. PaperPort converts the selection to text at the same time it copies the text to the Clipboard.

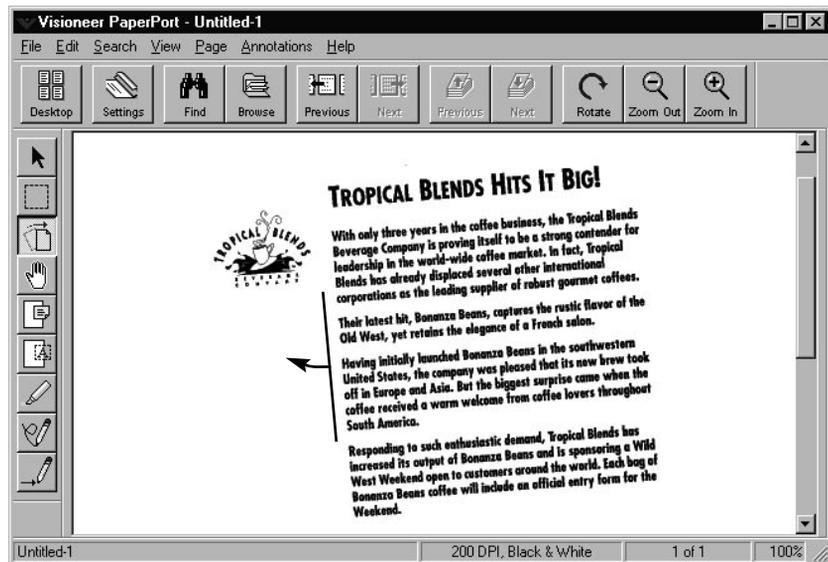


## STRAIGHTEN PAGE

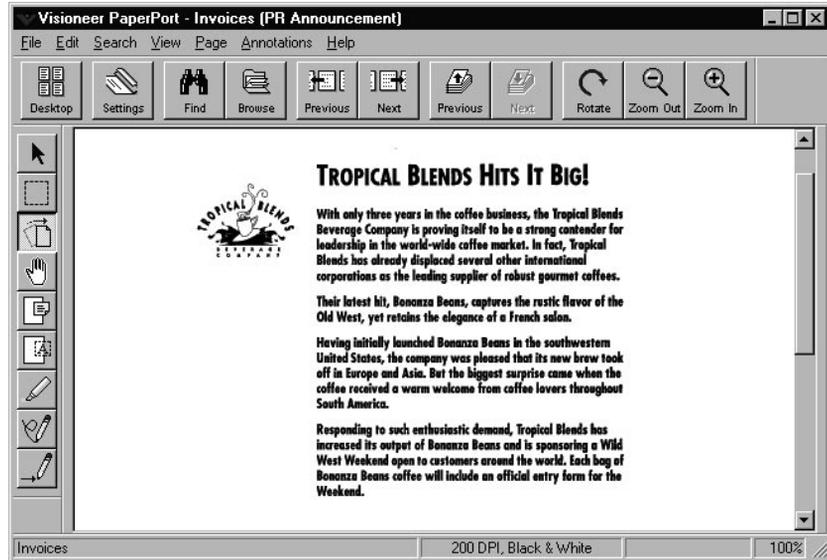
Use the Straighten Page tool to straighten a page, either horizontally or vertically, that was originally scanned in at an angle.

### To straighten a page:

1. Hold down the mouse button and draw a line along the edge of an area that you want to be horizontal or vertical on the page.



- When you release the mouse button the PaperPort software straightens the whole page along the line you drew.

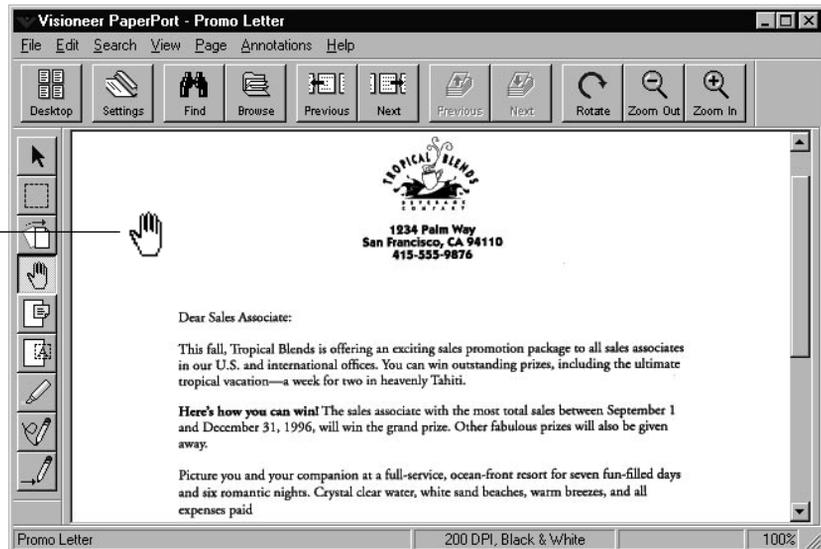


## PAN

Use the Pan tool to quickly scroll an image, up, down, left, or right.

**To use the Pan tool to scroll quickly:**

- Put the hand pointer on the page.
- Drag the mouse. The page image moves as you move the mouse.



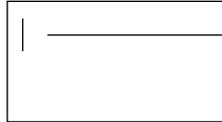


## STICKY NOTE

Use the Sticky Note tool to write a resizable note at any place on the page. You can also “collapse” the note so it doesn’t cover any information on the page.

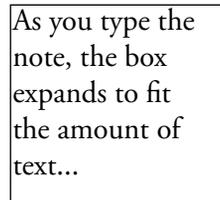
### To write a note with the Sticky Note tool:

1. Click the page.



The insertion point is ready for you to begin typing.

2. Type the note in the text box that appears.



1. To collapse all the sticky notes on a page, select any one of the notes first.



2. From the **Annotations** menu, choose **Collapse Sticky Notes**.



The Collapsed Note icon indicates a Sticky Note is at that position on the page.

3. To see the notes again, select any note, then choose **Expand Sticky Notes** from the **Annotations** menu.



## MARK-UP

Use the Mark-Up tool to add a line of text to the page.

**To write a note with the Mark-Up tool:**

1. Click the page where you want to type text.
2. Type a line of text.

*The Mark-Up tool is for typing a single line of text, like this.*

*Don't press Enter to type a second line of text...*

*...instead create another mark-up box and type your text.*

**HIGHLIGHTER**

Use the Highlighter tool to highlight any part of a page with a color.

**To highlight a portion of a page:**

- Hold down the mouse button and drag the Highlighter tool over the area you want to highlight.

### Here's What the Press is saying about PaperPort™:

"Visioneer. . . has created a small, simple, inexpensive, and elegant scanning system . . . that makes it child's play to load images of paper documents into your computer and organize and manage them."



—Wall Street Journal

"Visioneer has added enough features and compatibility with industry-standard document and communication packages to make this version a big step forward - without compromising the MVP Award-winning usability of its first release."

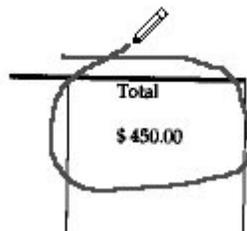
—PC Computing

**FREEHAND**

Use the Freehand tool to draw freehand marks, for example, circle text or underline important sentences.

**To draw freehand lines on a page:**

- Hold down the mouse button and draw a line around the area you want to emphasize.



To change the line width of an existing line, select it, then choose Line Width from the Annotations menu and choose a new line width.

To change the width for new lines that you want to draw, click the **Freehand** tool or **Arrow** tool, choose **Line Width** from the **Annotations** menu and then choose a new width. Existing lines will not be affected.

▼ **NOTE:** Changing the line width affects both the Arrow tool and Freehand tool.

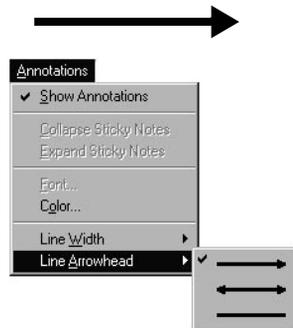


## ARROW

Use the Arrow tool to draw straight lines, with or without arrowheads, to point to specific parts of a page.

### To draw straight lines with the Arrow tool:

1. Hold down the mouse button and drag to draw a line or arrow.
2. To add or remove arrowheads when you draw, choose **Line Arrowhead** from the **Annotations** menu.

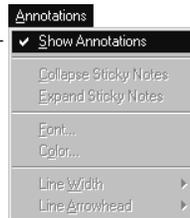


## DISPLAYING AND HIDING ANNOTATIONS

You can display items on Page View with all of their annotations either visible or hidden. This feature is especially useful if you want to print or fax an item, but don't want to include the annotations.

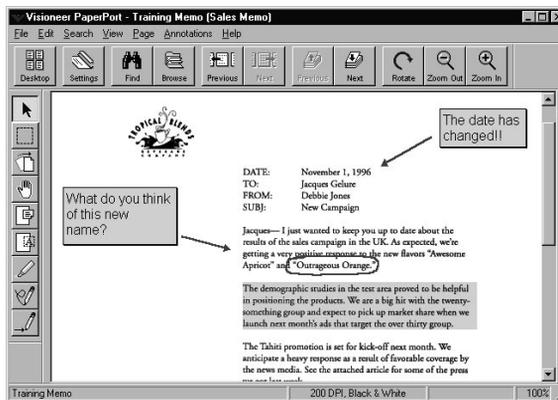
## To display or hide annotations:

1. In Page View, choose **Show Annotations** from the **Annotations** menu. The checkmark means the annotations will be visible.

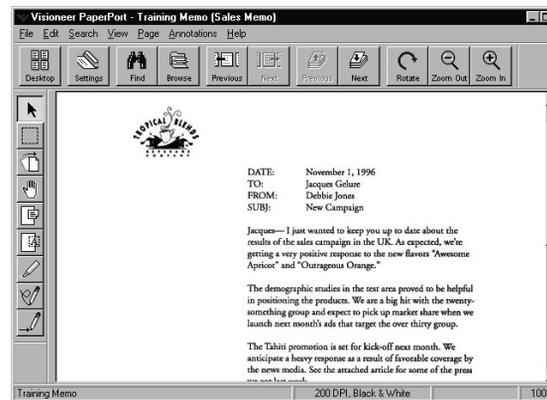


2. To hide annotations, choose **Show Annotations** again from the **Annotations** menu.

A page with visible annotations



The same page with hidden annotations

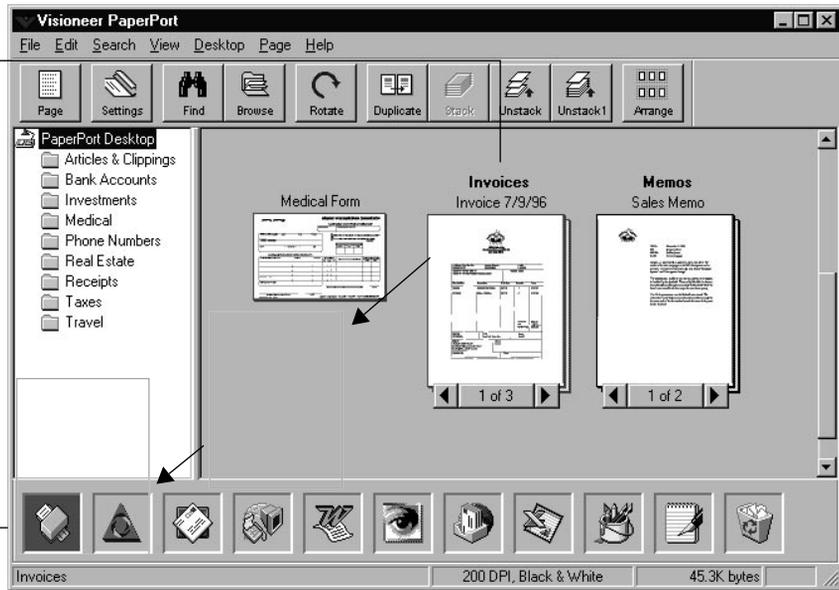


## PRINTING ITEMS

You can print any scanned item. If an item contains annotations that you don't want to include when it's printed, remember to turn off the annotations first.

**To print an item:**

1. Select the item.  
It can be a single item or a stack.
2. Drag the selected item onto the Printer link icon on the Link Bar.  
  
You can also just click on the Printer link icon.
3. When the Printer link icon is highlighted, release the mouse button.



You can also print by choosing Print from the File menu.

**RELATED TOPICS IN HELP**

Print, Save, and Delete Items

Work with Items in Page View

Add Notes, Arrows, and Other Annotations

## CHAPTER 8

# Filing Items in Folders

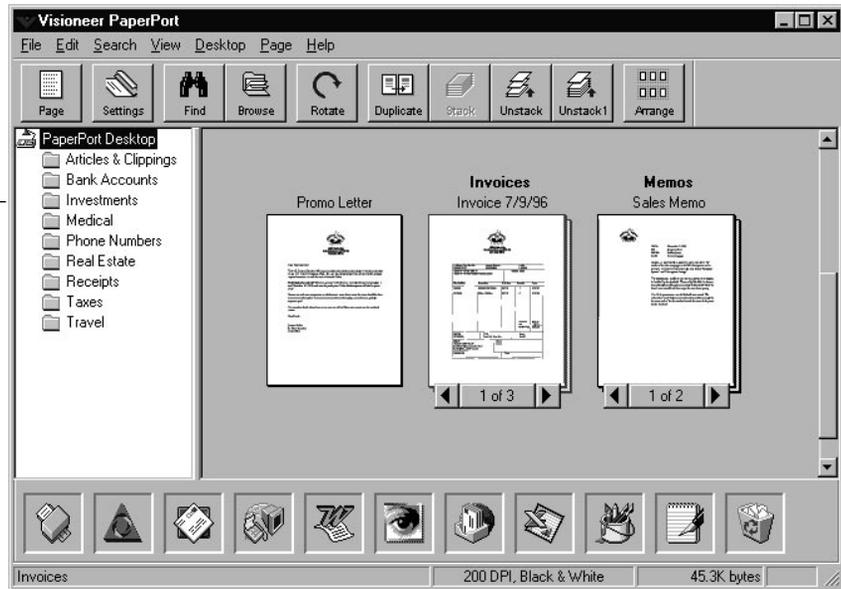
PaperPort's filing system with folders is for items scanned or imported to the PaperPort Desktop.

This chapter shows how to:

- Store items in folders
- Create new folders
- Give folders titles
- See the contents of folders
- Find an item in a folder

The list of folders appear in Desktop View along the left side of the window.

The list of folders



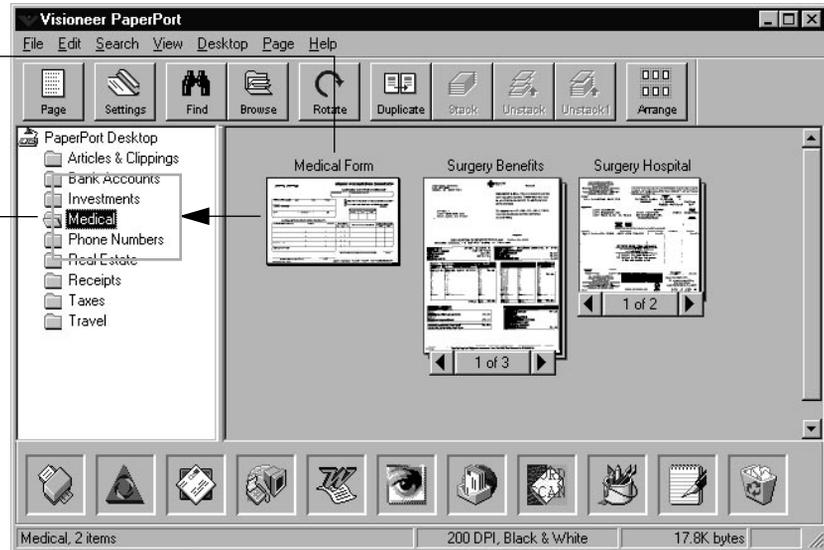
## DRAGGING AND DROPPING ITEMS INTO FOLDERS

The easiest way to move an item into a folder is by dragging-and-dropping the item into the folder.

You can file items one at a time, or you can file multiple selected items all at the same time. Each folder can hold up to 200 items.

## To drag and drop an item into a folder:

1. Click an item(s) to select it.
2. Drag the selected item onto a folder.
3. When the folder is highlighted, release the mouse button.



You can also put the selected item into a folder using the Move to Folder or Copy to Folder commands on the Desktop menu. The Copy to Folder command files a copy of the item in the folder, but leaves the original in its original folder.

## CREATING NEW FOLDERS

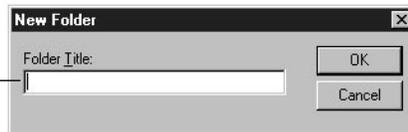
You can add new folders to the main list to create a personal filing system. For example, you could create a folder named Business Memos and another one named Personal Letters to keep your business correspondence separate from your personal correspondence.

To add a folder to the main list of folders:

1. Click PaperPort Desktop.
2. From the **File** menu, choose **New Folder**.



3. Type the new folder's title next to the new folder, and click **OK**.



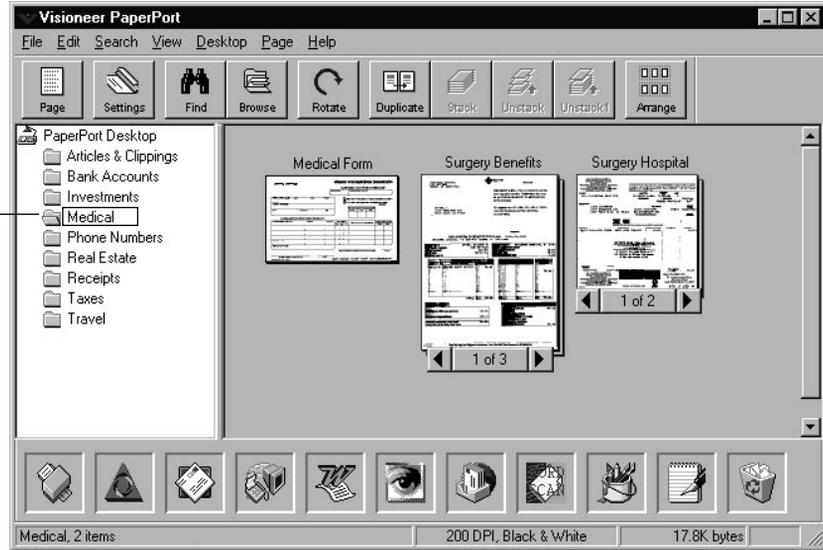
## GIVING FOLDERS NEW TITLES

Each folder must have a title. You can re-title any folder, including the basic set of folders that you receive with PaperPort.

- ▼ **NOTE:** The PaperPort Desktop is not a folder and cannot be renamed.

### To give a folder a new title:

1. Click a folder to select it.
2. Click the folder's title to see the text box for editing the title.
3. Type the new title and press the Enter key or just click elsewhere on the PaperPort Desktop.



You can also select the folder and choose Change Title from the File menu.

## SEEING THE CONTENTS OF FOLDERS

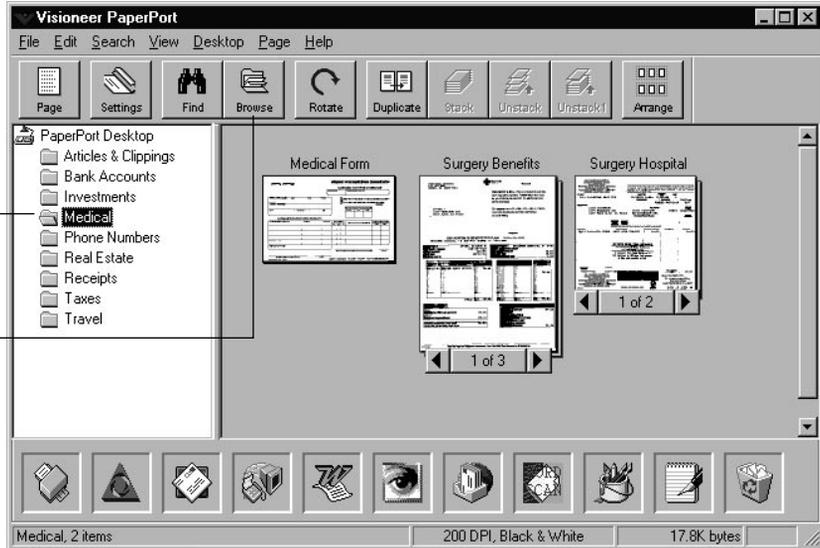
The Desktop View displays the contents of the open folder. Thus, if you open the Medical folder, you will see all of the scanned items stored in that folder.

Opening one folder, closes the other open folder.

**To see the items in a folder:**

1. Click a folder to see the items in it.

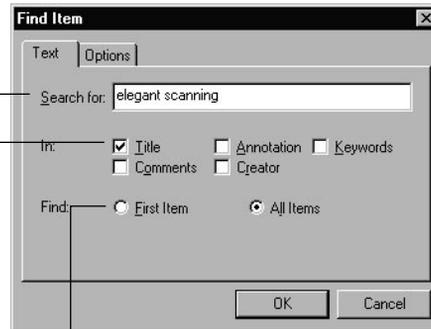
You can also click the **Browse** button to see all of the items in all of the folders.

**FINDING AN ITEM**

PaperPort's search features help you find items stored in folders. For example, if you recall the item's title, keywords, text annotations, or other identifying text, PaperPort can find the item.

## To find an item in a folder:

1. In the Desktop View, choose **Find Item** from the **Search** menu.
2. Type the text that you know will identify the item.
3. Select one or more checkboxes to tell PaperPort where to search for the identifying text.
4. Select the buttons to find just the first or all items that have that text.
5. Click OK.



Clicking the Options tab on the dialog box displays several options for using the search features, including whether you want PaperPort to match the uppercase and lowercase letters in the search text or to match only whole words in the text.



### RELATED TOPICS IN HELP

Work with Items on the PaperPort Desktop  
 Create and Work with Stacks  
 Organize and Store Items in Folders  
 Find Items



## APPENDIX A

# PaperPort Viewer

With PaperPort Viewer, you can share PaperPort items—including articles, letters, contracts, budgets, reports, and photos with others who do not own the PaperPort software. PaperPort Viewer lets others view and print PaperPort items.

**You can distribute PaperPort Viewer to others free of charge.** One way to send someone PaperPort Viewer is to attach the PaperPort Viewer file to an e-mail message and then send that e-mail message to the recipient.

The PaperPort CD includes PaperPort Viewer for Windows. See the installation guide that you received with your PaperPort scanner for instructions about installing applications from the CD.

PaperPort Viewer is also available free on Visioneer's web page. The address is <http://www.Visioneer.com>. You can also get PaperPort Viewer from many online services, such as America Online and CompuServe. For example, on CompuServe, PaperPort Viewer is available under the Office Automation Vendor Forum.

PaperPort Viewer has its own help information. Please see that help information for a complete description of PaperPort Viewer and how to use it.



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