



PageKeeper® Standard

User's Manual

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Please Note

In order to use this application, you should know how to work in the Microsoft Windows environment. Please refer to Windows documentation if you have questions about how to use menu commands, dialog boxes, scroll bars, edit boxes, and so on.

PageKeeper Standard
Version 3

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Welcome

Welcome to PageKeeper, and thank you for using our software! The following documentation has been provided to help you learn about PageKeeper.

This User's Manual

This manual introduces you to the basics of using PageKeeper. It includes an introduction, installation and setup instructions, exercises for getting started, task-oriented instructions, and technical information.

PageKeeper Online Help

PageKeeper's online help contains information on features, settings, and procedures. The online help conforms to Windows online help conventions and has been designed for quick and easy information retrieval. Please see page 9 for information on using the online help.



PageKeeper Readme File

The PageKeeper Readme file contains last-minute information about the software. Please read it before using PageKeeper. To open the file, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Readme* after PageKeeper has been installed.

Using This Manual

This manual is written with the assumption that you know how to work in the Windows environment. Please 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.

The following conventions are used in this manual.

Convention	Purpose
<i>Italicized text</i>	<ul style="list-style-type: none">• Emphasizes menu commands, dialog box options, and labeled buttons For example: “Choose <i>Open...</i> in the File menu.” <ul style="list-style-type: none">• Emphasizes new terms the first time they are used• Emphasizes important words in a sentence
 Note symbol	Introduces a tip or an item of note
 Warning symbol	Introduces important information



Chapter 1

Introduction to PageKeeper

PageKeeper helps you organize documents in your computer. You can get paper documents off your desk by scanning them into PageKeeper. You can also keep track of other computer documents by adding them to PageKeeper's folder system.

Once you have added documents to PageKeeper, you can organize them into folders, arrange related documents into groups, preview and copy the contents of documents, make annotations on documents, open documents in their own and other applications, and find documents whenever you need them.

Please continue reading this chapter for information on these topics:

- PageKeeper Features
- PageKeeper User Interface
- Getting Online Help
- Getting Product Support

PageKeeper Features

Use PageKeeper as the central access point to the documents you use on a regular basis. This section provides an overview of PageKeeper's major features:

- **Scan Paper Documents**

You can scan paper documents to get them off your desk and organize their electronic images in PageKeeper. See page 38 for more information.

- **Add Other Computer Documents**

You can add other computer documents, such as word-processing documents and Web pages, to PageKeeper's folder system. See page 40 for more information.

- **Organize Documents into Folders and "Clipped Groups"**

You can create your own system of folders in which to arrange your documents. You can also "clip" documents together to associate them in groups. See page 43 for more information.

- **Thumbnail Representations**

PageKeeper displays thumbnail sketches of documents so you can identify them easier as you browse through folders. See page 37 for more information.

- **Preview Documents**

You can open documents in PageKeeper View instead of opening them in their own source applications. PageKeeper View displays the content of documents and any annotations that you make. See page 48 for more information.

- **Get Editable Text from Images**

PageKeeper can perform optical character recognition (OCR) at the time you scan pages or add image files to it. This allows you to find images based on their textual content and open or copy an image's textual content into text-based applications. See page 65 for more information.

- **Annotate Documents**

You can highlight areas, add text annotations, and draw lines and free-hand scribbles on documents in PageKeeper View. See page 50 for more information.

- **Find Documents**

You can search for documents based on their names, textual content, and text annotations. See page 57 for more information.

- **Open Documents for Editing**

You can open documents in their own source applications whenever you want to edit them. See page 53 for more information.

You can also open documents in other applications. See page 54 for more information.

- **Print, Mail, and Fax Documents**

You can print, mail, and fax documents directly from PageKeeper. See page 55 for more information.

More Features with PageKeeper Pro

Many more advanced features are available with PageKeeper Pro®—Caere's top-of-the-line document management software. Please see page 16 for a list of major features.



For more information on PageKeeper Pro, you can also go to Caere's World Wide Web page located at <http://www.caere.com/pagekeeper>

If You Own a Previous Version of PageKeeper

PageKeeper Standard 3.0 is part of a new generation of PageKeeper products. However, it is *not* intended to be an upgrade product for previous versions (1.0 – 2.1) of PageKeeper.

If you want to upgrade from a previous version, please upgrade to PageKeeper Pro 3.0. See “PageKeeper Pro Features” on page 16 for more information.

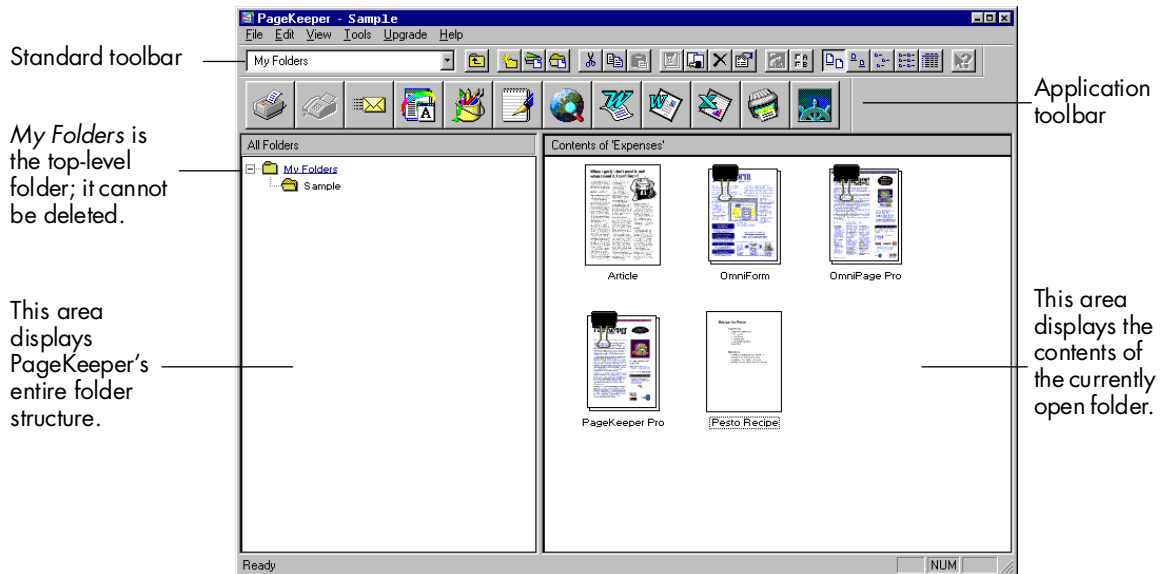
PageKeeper User Interface

These are the main parts of the PageKeeper user interface:

- PageKeeper Desktop
- PageKeeper View
- PageKeeper Find
- PK Scan Button

PageKeeper Desktop

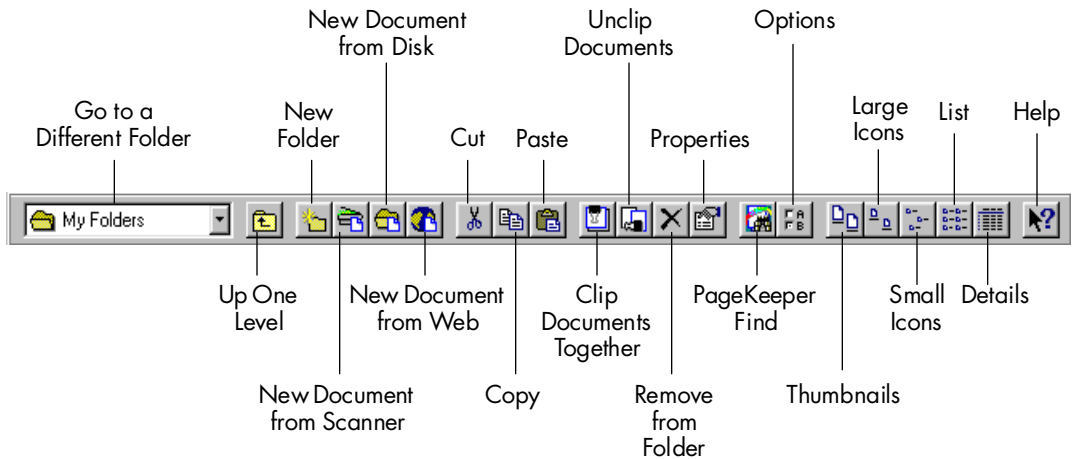
The PageKeeper desktop displays all of the folders and documents it contains. The top-level folder is called *My Folders*.



Please see "Organizing Documents" on page 43 for more information on organizing documents and folders on the PageKeeper desktop.

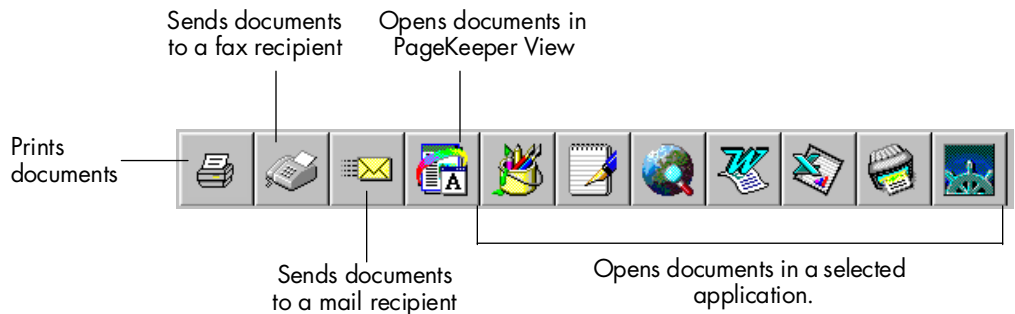
Standard Toolbar

The Standard toolbar appears on the PageKeeper desktop. It contains buttons for performing various tasks.



Application Toolbar

The Application toolbar appears on the PageKeeper desktop and in PageKeeper View. It contains buttons for printing, faxing, mailing, and opening your documents.



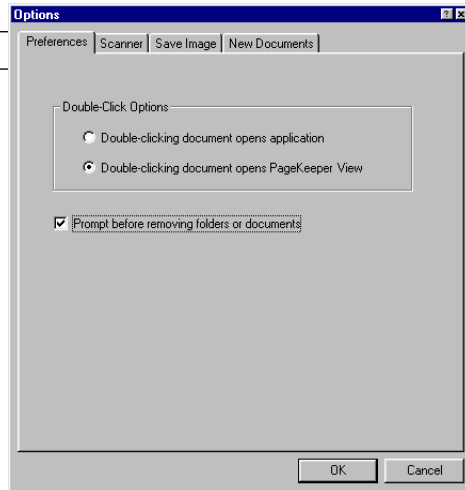
Please see “Viewing Documents” on page 48, “Opening Documents in Other Applications” on page 54, and “Printing, Faxing, and Mailing Documents” on page 55 for more information.

Options Dialog Box



The Options dialog box contains settings you can select for PageKeeper operations. To open the Options dialog box, click the Options button in the Standard toolbar or choose *Options...* in the Tools menu.

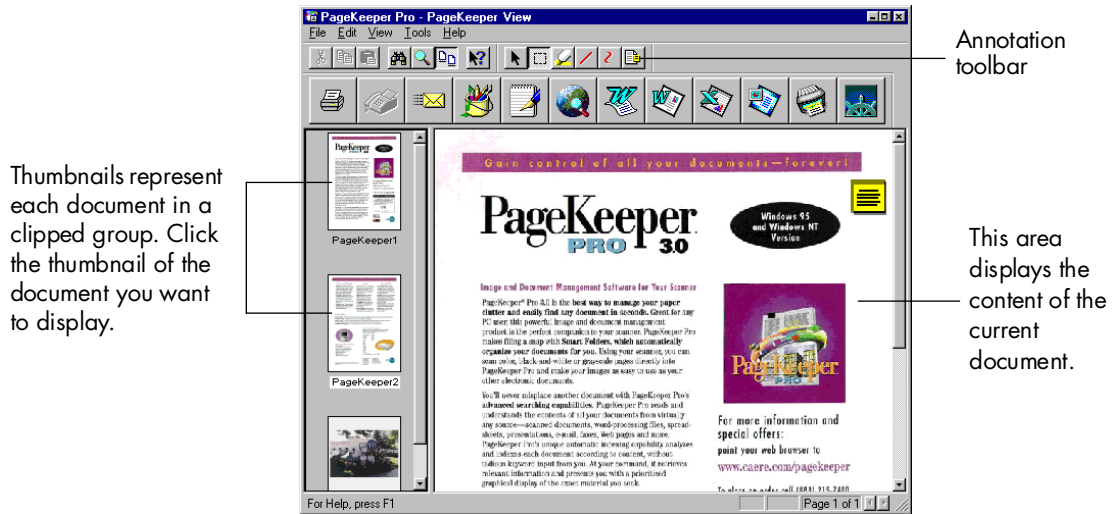
Click each tab to view and select different settings.



Please see “Selecting PageKeeper Settings” on page 34 for more information.

PageKeeper View

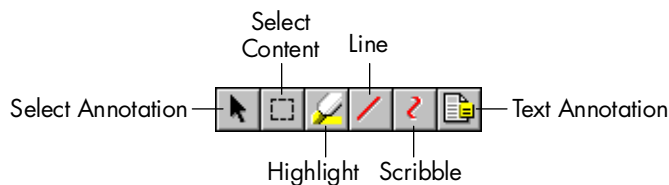
PageKeeper View allows you to view the contents of documents without having to open their source applications. You cannot edit documents in PageKeeper View, but you can annotate them with text notes, highlights, lines, and freehand drawings. You can also copy the content of documents to the Clipboard and open documents in other applications.



Please see “Viewing Documents” on page 48 for more information.

Annotation Toolbar

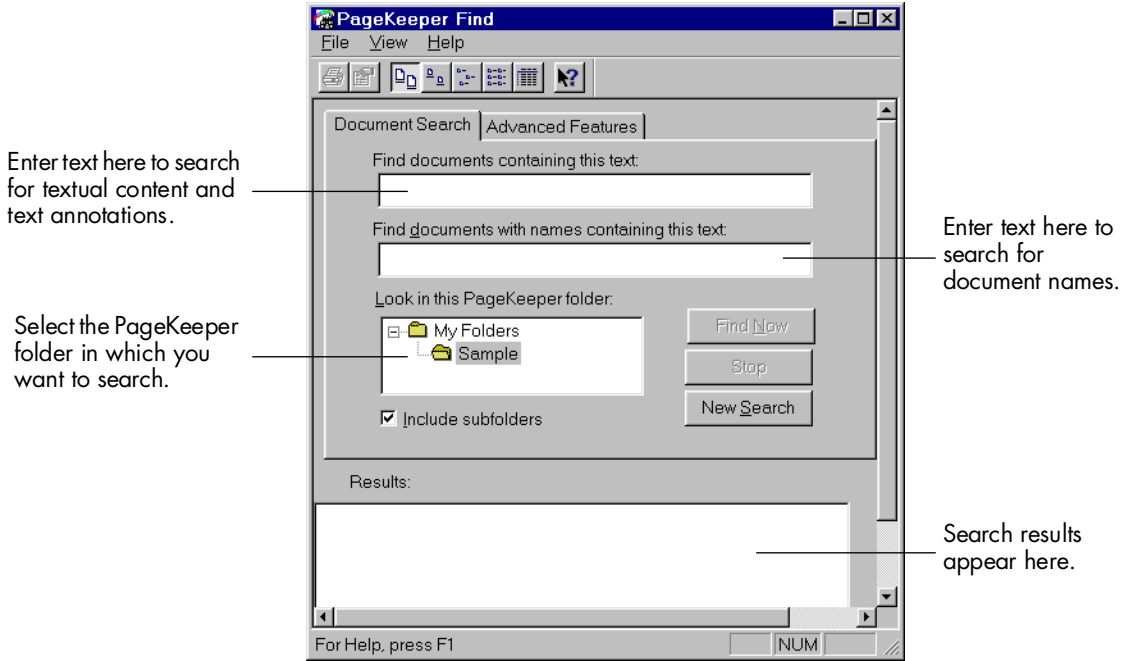
The Annotation toolbar appears in PageKeeper View. It contains buttons for selecting items and making annotations on documents.



Annotations do not affect the source document; they are only visible in PageKeeper View. Please see “Annotating Documents” on page 50 for more information.

PageKeeper Find

The PageKeeper Find feature allows you to search for documents based on their names, textual content, and text annotations.



Please see "Finding Documents" on page 57 for more information.

PK Scan Button

The PK Scan button is one way that you can scan paper documents into PageKeeper. When you open it, the PK Scan button sits on your Windows desktop.



Please see page 39 for more information on scanning with the PK Scan button.

Getting Online Help

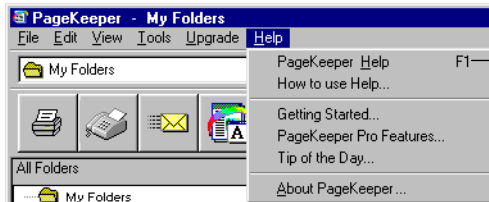
In addition to using this manual, you can use PageKeeper's online help to learn about features, settings, and procedures. Online help is available after you install PageKeeper.



PageKeeper's online help follows the conventions of Windows online help. Choose *How to Use Help...* in PageKeeper's Help menu to get information on using Windows online help.

Help Menu

One way to open the PageKeeper online help is to choose commands in the Help menu.



PageKeeper Help is the first command in the Help menu. Use it to get contents and index listings for all online help topics.

The Help menu commands will vary depending on if you are in the PageKeeper desktop, PageKeeper View, or PageKeeper Find.

Context-Sensitive Help

You can get on-the-spot information about a particular PageKeeper command, toolbar button, or dialog box option in the following ways.



- Click the Help button in the Standard toolbar and then click any toolbar button, menu command, or area of the PageKeeper desktop to display a help topic explaining that item.
- Click the question-mark button in the upper-right corner of a dialog box and then click an item in the dialog box to get a pop-up explanation for that item.

Getting Product Support

For the fastest and easiest way to get help, please look for solutions in this manual or in the online help. See page 60 for troubleshooting tips.

If you need additional help, please use the following resources:

- **Caere's World Wide Web site**

Go to Caere's World Wide Web site for common questions and answers, updates, patches, troubleshooting procedures, and product information.

Caere's Web address: **<http://www.caere.com>**

- **PageKeeper Readme file**

Read the *PageKeeper Readme* file for last-minute information about the software. This is available after installing PageKeeper. To open the file, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Readme* .

- **Caere Product Support document**

Read the *Caere Product Support* document to get a list of support phone numbers, including ones for international product support. This document has been provided to you either as a paper document in your product package or as an electronic document in PDF format. To open the electronic version of the document, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *Technical Support* .



You must have Adobe Acrobat Reader 3.01 installed if you want to read the electronic version of the *Caere Product Support* document. For instructions on installing this free software, check the CD-ROM on which PageKeeper was provided.



Chapter 2

Installation and Setup

This chapter provides information on installing PageKeeper and setting up your scanner with it.

You might have already installed PageKeeper if you installed software from a CD-ROM provided with your scanner. In this case, see “Starting PageKeeper” on page 15.

Please continue reading this chapter for information on these topics:

- Minimum System Requirements
- Installing PageKeeper
- Setting Up Your Scanner with PageKeeper
- Starting PageKeeper
- PageKeeper Pro Features

Minimum System Requirements

To install and run PageKeeper, you need the following setup at minimum:

- Computer with a 486 processor
- Microsoft Windows 95 or Windows NT 4.0
- Total system memory of 8MB RAM for Windows 95 and 16MB RAM for Windows NT 4.0
- 30MB of free hard disk space for program files and 10MB for temporary files during installation
- SVGA or VGA monitor
- Windows-compatible pointing device
- A compatible scanner to scan documents



Performance and speed will be enhanced if your system exceeds these minimum requirements.

Installing PageKeeper

PageKeeper might already be installed on your computer if you installed software from a CD-ROM provided with your scanner.

To check if PageKeeper is installed, click *Start* in the Windows taskbar and look for *Programs* ▶ *Caere Applications* ▶ *PageKeeper Standard* . If PageKeeper is installed already, see “Starting PageKeeper” on page 15.

Read the rest of this section if PageKeeper has not been installed.



The instructions in this section only apply if you have a separately labeled PageKeeper CD-ROM. If you received PageKeeper on a CD-ROM provided with another product, please refer to the documentation accompanying that CD-ROM for installation instructions.

Before installing PageKeeper:

- Make sure your scanner is connected, turned on, and compatible with your system.
 - Close all other applications — especially anti-virus programs.
-



To install PageKeeper on Windows NT 4.0, you must be logged in with administrator privileges.

To install PageKeeper:

- 1 Insert PageKeeper’s CD-ROM in the CD-ROM drive. PageKeeper’s Setup program should start automatically. If it does not start, locate your CD-ROM drive in Windows Explorer and double-click the *Setup.exe* program at the top-level of the CD-ROM.
- 2 Click *Next* to continue with installation.
- 3 Follow the onscreen instructions to finish installation. By default, PageKeeper installs all its program files (*.exe) in the `\PageKeep30\System` folder.

Setting Up Your Scanner with PageKeeper

To use your scanner with PageKeeper, you must install the Caere Scan Manager and select your scanner in it. You are prompted to do this during PageKeeper's regular installation.

To make sure the Scan Manager is installed:

- 1 Click *Start* in the Windows taskbar and choose *Settings* ▶ *Control Panel* .
- 2 Look for the *Caere Scan Manager* icon.
The icon will not appear if you have not installed the Scan Manager.

Read the rest of this section if the Scan Manager has not been installed.



The instructions in this section only apply if you have a separately labeled PageKeeper CD-ROM. If you received PageKeeper on a CD-ROM provided with another product, please refer to the documentation accompanying that CD-ROM for installation instructions.

To install the Scan Manager:

- 1 Make sure your scanner is turned on when you start your computer.
- 2 Exit PageKeeper if it is open.
- 3 Insert PageKeeper's CD-ROM in the CD-ROM drive.
- 4 Cancel the regular Setup program if it starts automatically.
- 5 Locate your CD-ROM drive in Windows Explorer and double-click the *Setup.exe* file located in the *ScanMgr\Disk1* folder.
- 6 Select your scanner when you are prompted.
The Scan Manager finishes installing after you make your scanner selection.
Once your scanner is set up with PageKeeper, you can select scanner settings in the Options dialog box. See page 35 for more information.

Starting PageKeeper

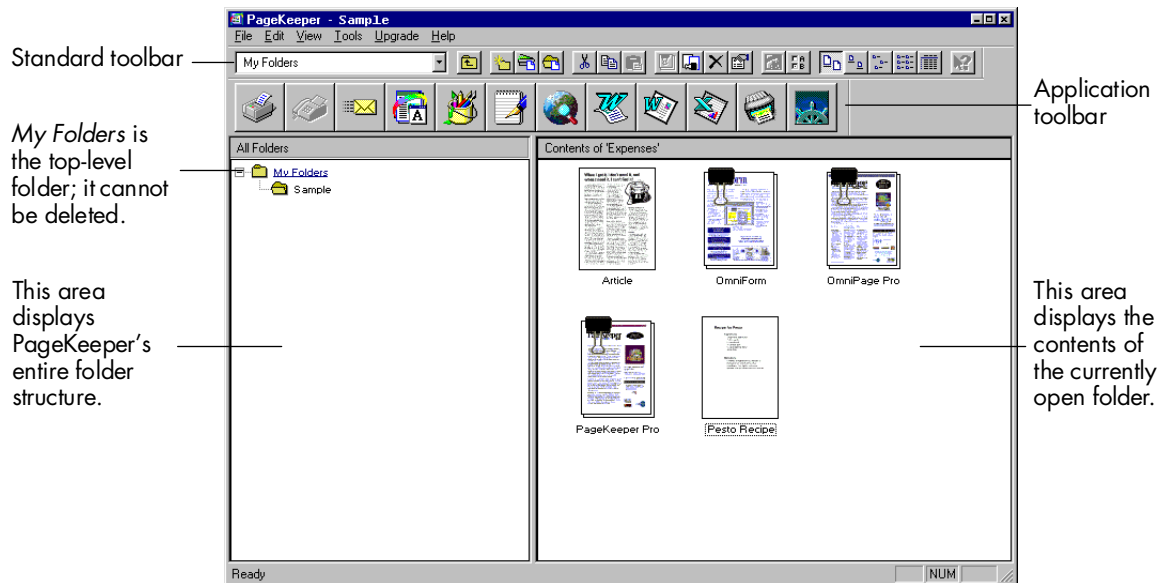


To start PageKeeper, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Standard* . Or, double-click the PageKeeper Standard icon on your Windows desktop.



PageKeeper takes some extra time to launch the very first time you start it because it customizes the Application toolbar with the applications that it finds installed on your system.

PageKeeper's desktop displays all of the folders and documents it contains. The top-level folder is called *My Folders*.



The *Sample* folder in PageKeeper contains sample documents. You can work with these documents in Chapter 3, Getting Started Exercises, to familiarize yourself with PageKeeper.

PageKeeper Pro Features

PageKeeper Pro is Caere's top-of-the-line document management product. It has these major feature enhancements:

- **Advanced Searching**
Searches the contents of all your documents based on words related to the information you seek. You can use Boolean (and, or) logic and search over multiple criteria such as keywords, phrases, dates, document size, and so on.
- **Sophisticated Indexing**
Unique indexing capabilities automatically analyze and index every document's content, with no keyword input required. At your command, PageKeeper Pro instantly retrieves relevant information from your hard disk, network, fax, and the World Wide Web.
- **Hit Highlighting**
Search words and phrases are highlighted in all the documents found in your search so that you can easily find the information you are seeking.
- **Relevance Ranking**
Documents from your search are displayed in a prioritized ranking according to how closely they match your search criteria.
- **Latest, Most Accurate OmniPage Pro® OCR**
Award winning OCR (optical character recognition) technology turns your images into text for editing in your favorite text-based applications. Scanned images will be as easy to find and use as other electronic documents.
- **Smart Folders**
Related documents are automatically organized for you according to the criteria you designate so you do not have to spend time filing documents manually.
- **Broad Color Image Support**
You can scan and manage color, grayscale, and black-and-white images with up to a 300 dpi resolution. Choose the resolution best for you.
- **Expanded File Format Support**
Over 40 file formats supported including common image file formats, word-processing documents, spreadsheets, and Web pages. Now you can quickly convert documents to many more formats with the simple click of a button.

- **Compatibility with Previous Versions of PageKeeper**

You can convert PageKeeper 2.0, 2.01, and 2.1 databases for use in PageKeeper Pro 3.0.



For more information on PageKeeper Pro, please go to Caere's World Wide Web site located at <http://www.caere.com/pagekeeper>



Chapter 3

Getting Started Exercises

This chapter includes the following exercises to help familiarize you with PageKeeper:

- Getting Started
- Exercise 1: Create a Folder
- Exercise 2: Move Documents into a Folder
- Exercise 3: Work in PageKeeper View
- Exercise 4: Work with a Clipped Group
- Exercise 5: Add a Text Document to PageKeeper
- Exercise 6: Find a Document

Getting Started

All of the exercises in this chapter are started from the PageKeeper desktop, which appears when you start PageKeeper.

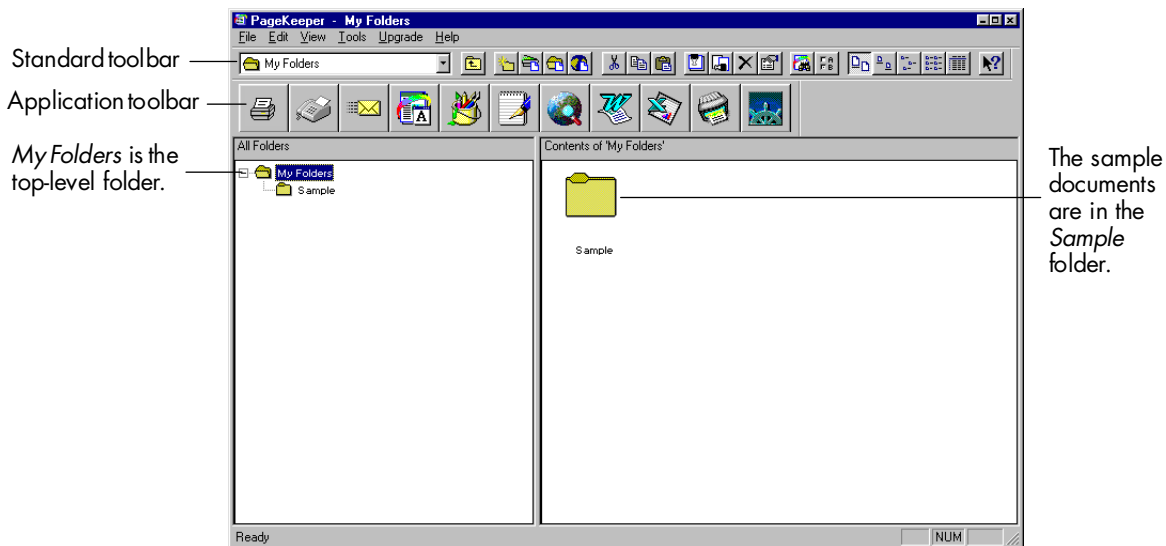


To start PageKeeper, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Standard* . Or, double-click the PageKeeper Standard icon on the Windows desktop.



PageKeeper may take some extra time to launch the very first time you start it because it customizes the Application toolbar with the applications that it finds on your computer.

PageKeeper's top-level folder is called *My Folders* . This contains another folder called *Sample* , which contains sample documents.



Some exercises in this chapter rely on tasks accomplished in previous exercises. Therefore, you should complete all exercises in order.

Exercise 1: Create a Folder

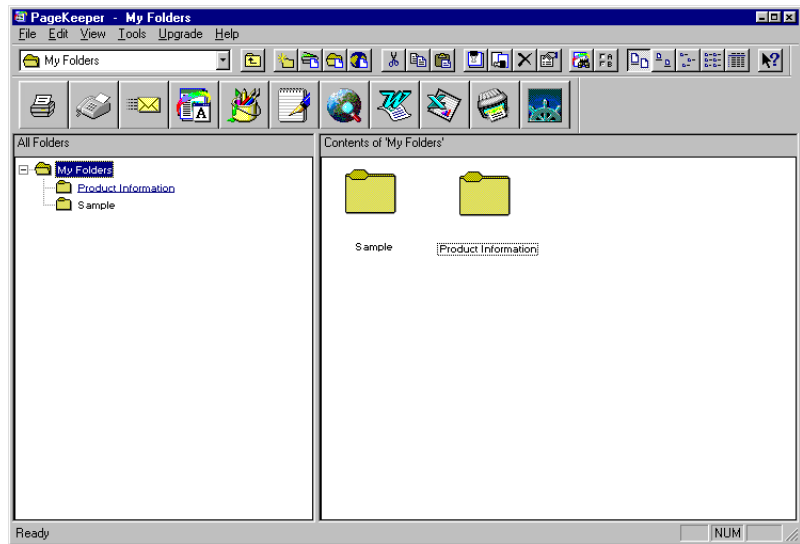
Follow these instructions to create a folder.

- 1 Choose *New* ► *Folder* in the File menu.
A folder icon appears with its default name highlighted.



New Folder

- 2 Type *Product Information* to replace the folder name and then press the Enter key.
The PageKeeper desktop should now display the *Product Information* folder next to the *Sample* folder.

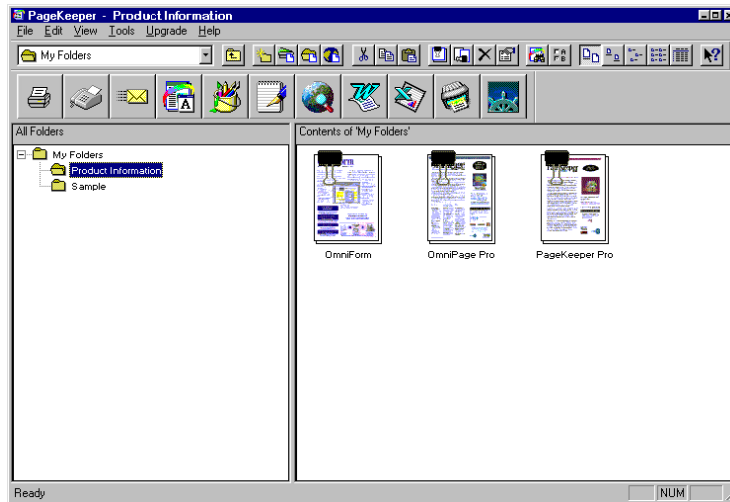


For more information on creating folders, see page 43.

Exercise 2: Move Documents into a Folder

Follow these instructions to move some of the sample documents into the *Product Information* folder you created in Exercise 1.

- 1 Click the *Sample* folder on the left area of the PageKeeper desktop to open it.
The contents of the *Sample* folder are displayed in the right area of the desktop.
- 2 Select the clipped group called *OmniForm* by clicking it once.
- 3 Hold down the Ctrl key and click the *OmniPage Pro* and *PageKeeper Pro* clipped groups so they are also selected.
- 4 Choose *Cut* in the Edit menu.
The selected clipped groups disappear and are placed on the Clipboard.
- 5 Click the *Product Information* folder on the left area of the PageKeeper desktop to open it.
- 6 Choose *Paste* in the Edit menu.
The selected clipped groups are placed in the *Product Information* folder.



For more information on organizing documents in PageKeeper, see page 43.

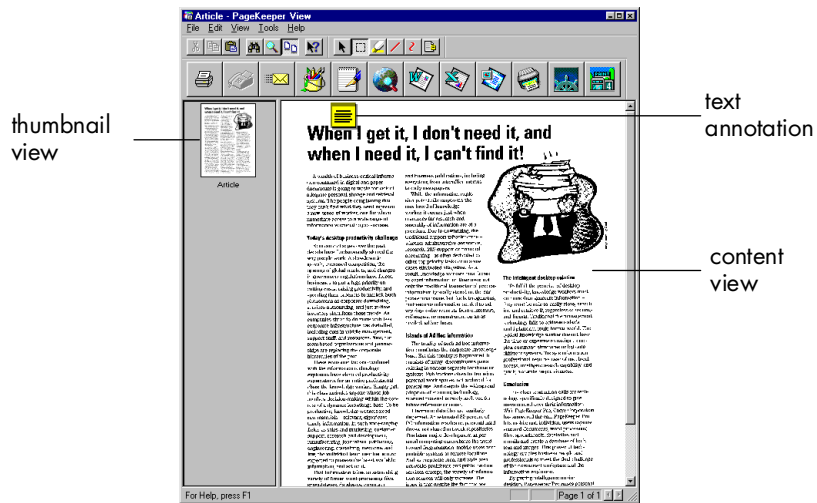
Exercise 3: Work in PageKeeper View

PageKeeper View allows you to preview documents, add annotations to them, and copy their content. This section contains three exercises that will familiarize you with PageKeeper View.

3a: Open a Document in PageKeeper View

Follow these instructions to open a document in PageKeeper View.

- 1 Open the *Sample* folder.
- 2 Select the document called *Article*.
- 3 Choose *PageKeeper View* in the File menu. The document opens in PageKeeper View.

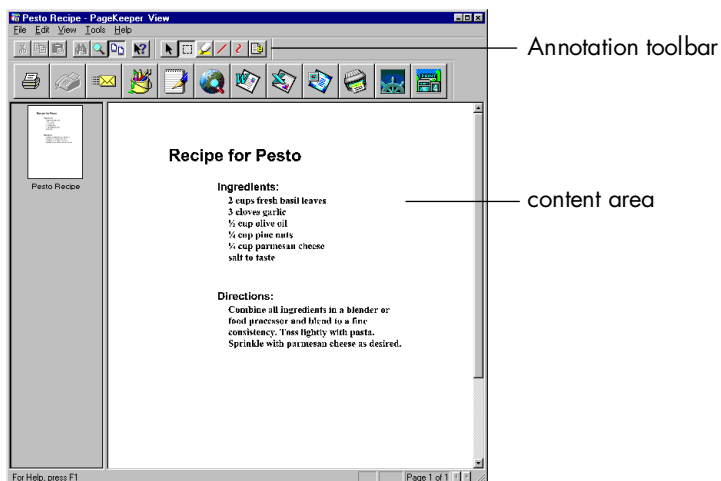


- 4 Double-click the yellow text annotation marker to open the text annotation.
- 5 Click outside the text annotation to close it.
- 6 Choose *Exit* in the File menu to close PageKeeper View.

3b: Add a Text Annotation to a Document

Follow these instructions to add a text annotation to a document in PageKeeper View.

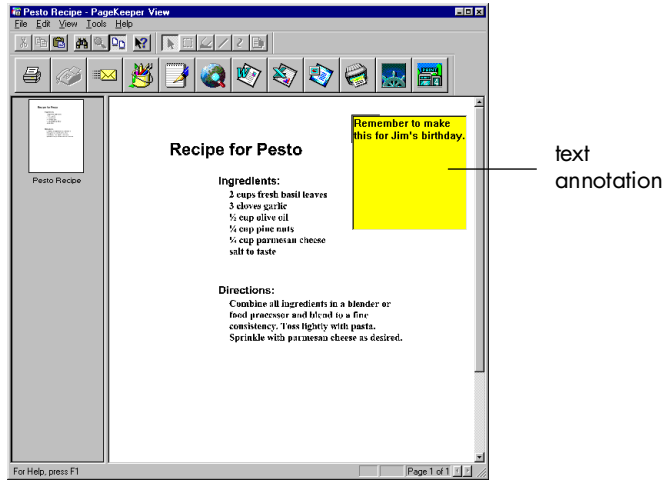
- 1 Open the *Sample* folder.
- 2 Select the document called *Pesto Recipe*.
- 3 Click the PageKeeper View button in the Application toolbar. The document opens in PageKeeper View.



- 4 Click the Text Annotation button in the Annotation toolbar. If the Annotation toolbar is not active, click anywhere in the document's content area.
- 5 Click anywhere in the content area of the document to create the text annotation. A yellow text box appears with the cursor ready for typing.
- 6 Type in this text:
Remember to make this for Jim's birthday.
- 7 Click outside the annotation box when you are done. A yellow text icon representing the annotation appears in the document.



- 8 Double-click the text icon to open the annotation.



- 9 Click outside the annotation box to close it again.
- 10 Choose *Exit* in the File menu to close PageKeeper View.

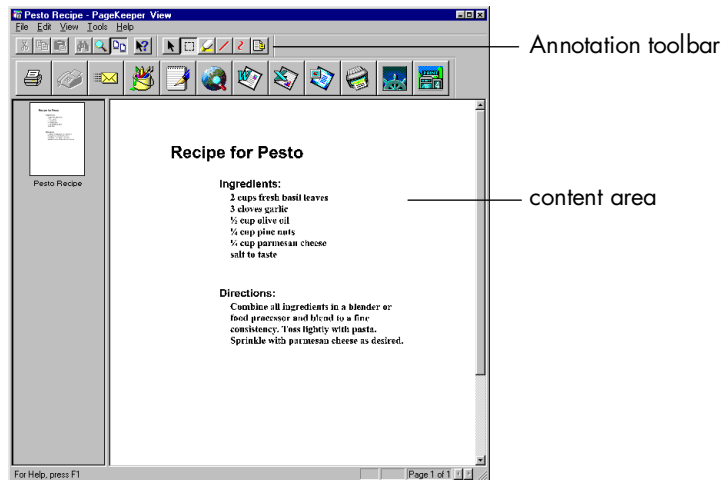
3c: Copy Text to the Clipboard

Follow these instructions to copy text information from a document to the Clipboard.



This exercise illustrates how PageKeeper OCR (optical character recognition) can produce editable text from image documents. The *Pesto Recipe* document is a scanned image that normally would not be editable in a text-editing application such as Microsoft Word. For more information, see “Performing Background OCR on Images” on page 65.

- 1 Open the *Pesto Recipe* document in PageKeeper View.



- 2 Click the Select Content button in the Annotation toolbar. If the Annotation toolbar is not active, click anywhere in the document's content area.
- 3 Hold down your mouse button and drag the mouse pointer to select the list of ingredients in the recipe. A box surrounds the items you select.
- 4 Choose *Copy* in the Edit menu to copy text from the selected area to the Clipboard.
- 5 Open a text-editing application, such as Microsoft Word, and paste the Clipboard contents into a document.



For more information on working in PageKeeper View, see page 48.

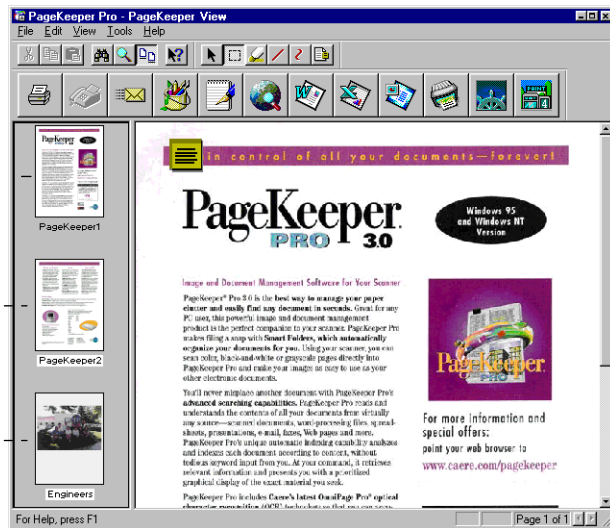
Exercise 4: Work with a Clipped Group

A *clipped group* is a collection of individual documents that have been associated together in PageKeeper. This section contains three exercises that will familiarize you with clipped groups.

4a: Open a Clipped Group in PageKeeper View

- 1 Open the *Product Information* folder you created in Exercise 1.
- 2 Double-click the clipped group called *PageKeeper Pro* .
The clipped group opens in PageKeeper View.

Click the thumbnail of the document you want to display.



- 3 Click thumbnails on the left side of the viewer to display different documents in the clipped group.
- 4 Choose *Exit* in the File menu to close PageKeeper View.

4b: Unclip Documents

- 1 Open the *Product Information* folder.
- 2 Select the *PageKeeper Pro* clipped group.
- 3 Choose *Unclip Documents* in the Tools menu.
The documents are unclipped. Separate documents called *PageKeeper1* , *PageKeeper2* , and *Engineers* are displayed individually in the *Product Information* folder.

4c: Clip Documents Together

- 1 Open the *Product Information* folder.
- 2 Select the *PageKeeper1* document.
- 3 Hold down the Ctrl key and select the *PageKeeper2* document and the *Engineers* document.
- 4 Choose *Clip Documents Together* in the Tools menu.
A thumbnail for the clipped group appears with its default name highlighted.
- 5 Type *PageKeeper Pro* to replace the default name and press the Enter key.



PageKeeper Pro

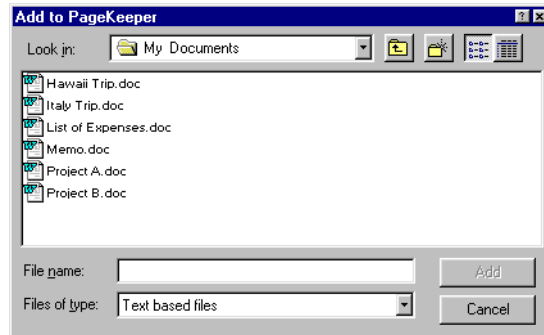


For more information on clipped groups, see page 43.

Exercise 5: Add a Text Document to PageKeeper

Follow these instructions to add the *PageKeeper Readme* file to PageKeeper.

- 1 Open the *My Folders* folder.
- 2 Choose *New ▶ Document from Disk...* in the File menu. The Add to PageKeeper dialog box appears.



- 3 Select *Text based files* in the *Files of type* drop-down list.
- 4 Locate and open the document folder within PageKeeper's installation folder on your computer. The default location of PageKeeper's installation folder is `c:\program files\caere applications\PageKeep30`.
- 5 Select the *Readme.txt* document and click *Add* to add it to PageKeeper. A thumbnail representing the document is added to *My Folders*.
- 6 Select the *Readme* document on the PageKeeper desktop.
- 7 Click the PageKeeper View button in the Application toolbar. The Readme file is displayed in PageKeeper View. Read through this file for last-minute information concerning PageKeeper.
- 8 Choose *Exit* in the File menu to close PageKeeper View.



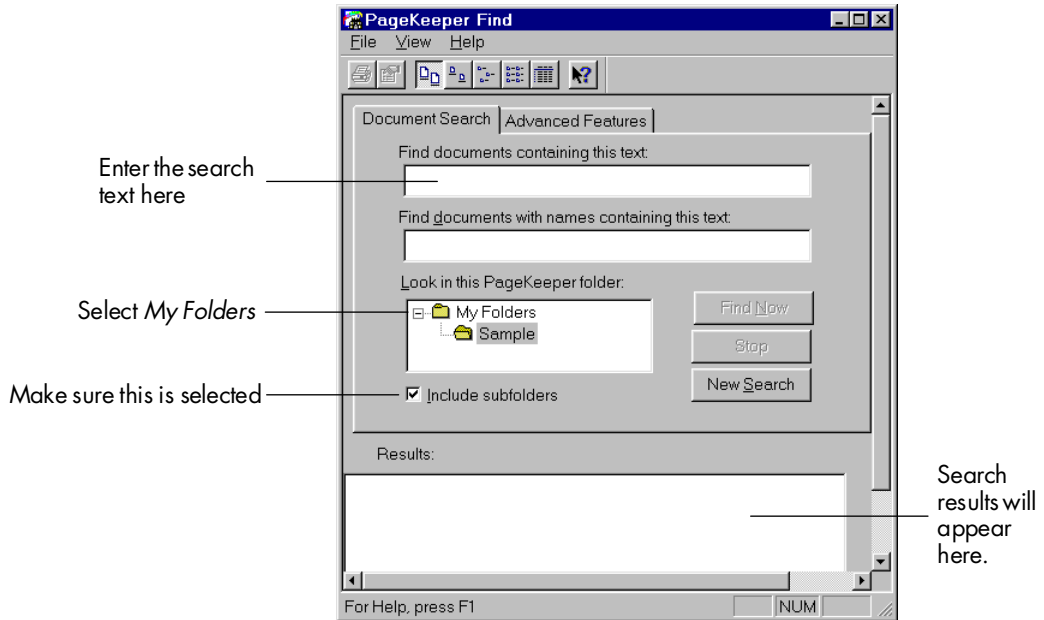
For more information on adding documents to PageKeeper, see page 37.

Exercise 6: Find a Document

Follow these instructions to find the document you annotated in Exercise 3b.



- 1 Choose *PageKeeper Find...* in the Tools menu.
The PageKeeper Find window opens.



- 2 Type the following search text in the first text box:
jim's birthday



The search is not case-sensitive, so you will get the same results using uppercase or lowercase letters.

- 3 Select *My Folders* as the folder in which to search.
Make sure *Include subfolders* is also selected.
- 4 Click *Find Now* to start the search.
The document called *Pesto Recipe* should appear in the list of search results.
- 5 Select the document and choose *PageKeeper View* in the File menu.
The document opens in PageKeeper View.

- 6 Choose *Find...* in the Edit menu to open the Find dialog box.

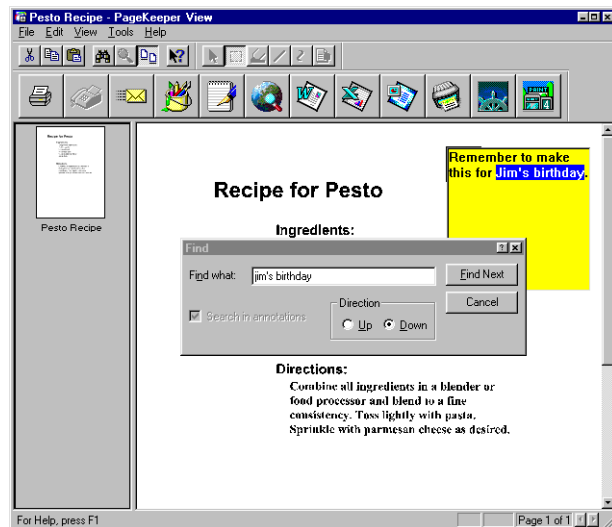


- 7 Make sure that *Search in annotations* is selected.
- 8 Type in the following text:
jim's birthday



The search is not case-sensitive, so you will get the same results using uppercase or lowercase letters.

- 9 Click *Find Next*.
- The annotation that contains *Jim's birthday* opens.



- 10 Click *Cancel* in the Find dialog box to close it.
- 11 Click outside the text annotation box to close it.
- 12 Choose *Exit* in the File menu to close PageKeeper View.
- 13 Choose *Exit* in the File menu to close PageKeeper Find.



For more information on finding documents, see page 57.



Chapter 4

Working in PageKeeper

This chapter provides information on the main tasks you can accomplish in PageKeeper. To familiarize yourself with PageKeeper, go through the Getting Started exercises in Chapter 3.

Please continue reading this chapter for information on these topics:

- Selecting PageKeeper Settings
- Adding Documents to PageKeeper
- Organizing Documents
- Viewing Documents
- Annotating Documents
- Opening Documents for Editing
- Printing, Faxing, and Mailing Documents
- Finding Documents



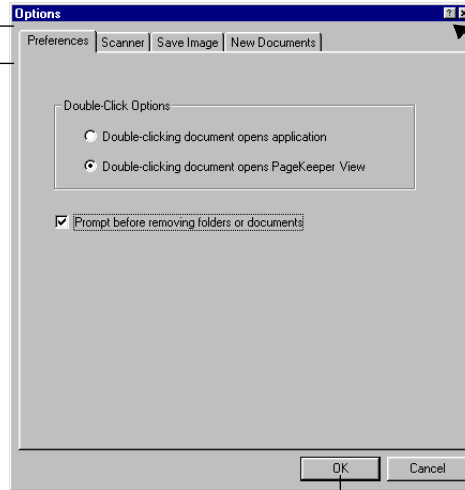
For the most complete information on working in PageKeeper, please use its online help. See “Getting Online Help” on page 9 for more information.

Selecting PageKeeper Settings



You can select settings for PageKeeper in the Options dialog box. To open this dialog box, click the Options button in the Standard toolbar or choose *Options...* in the Tools menu.

Click each tab to view and select different settings.



To get information about a particular setting, click this button and then click the setting. An explanation will pop up.

After selecting the desired settings, click *OK* to close the Options dialog box.

For more detailed information on settings, please look in PageKeeper's online help.



Certain setting selections affect the ability to select other settings. For example, if you select *.PCX as the file format for saving scanned images, you will not be able to select the setting for saving multiple pages as one file. This is because the *.PCX format does not support multiple pages. Settings that are unavailable are grayed out.

Preferences Settings

Click the *Preferences* tab in the Options dialog box to select preferences for working in PageKeeper.

Select how you want documents to be opened when you double-click them.

Displays a confirmation message before removing any document, clipped group, or folder.

Scanner Settings

Click the *Scanner* tab in the Options dialog box to select settings for scanning documents into PageKeeper.

Select a page size and orientation for the pages you plan to scan.

The selectable scan mode options depend on the capabilities of your scanner.

Select a brightness setting if the scan mode is set to black and white.

Asks if you want to continue scanning after scanning the current pages.

You can select these ADF options if your scanner has an automatic document feeder.

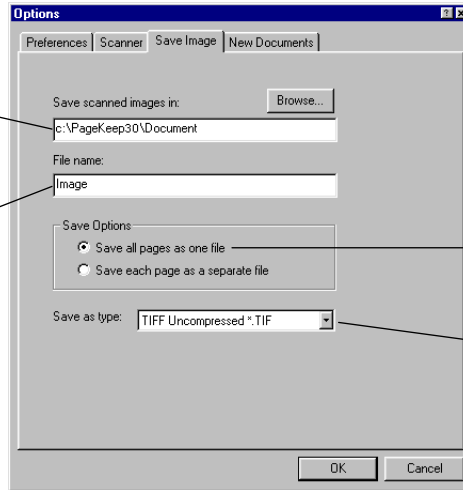
The selectable scanning resolution depends on the scan mode selection.

Save Image Settings

Click the *Save Image* tab in the Options dialog box to select settings for the way scanned images will be saved to disk on your computer.

Scanned document files are saved to this folder location on your computer.

Each scanned document is given a default file name with an appended number (numbers are incremental starting at "0").



This setting is only available if you save to an image file type that supports multiple pages, such as *.dcx.

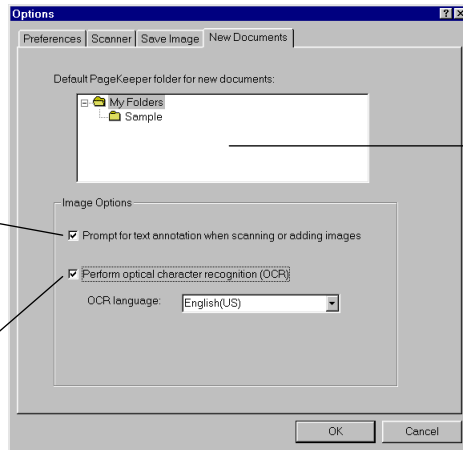
Scanned documents are saved as this image file type.

New Document Settings

Click the *New Documents* tab in the Options dialog box to select settings for adding new documents to PageKeeper.

Select this if you want to be prompted to add text annotations when scanning pages or adding image files.

Select this if you want to get background text for scanned pages or image files. Be sure to specify the correct language for your documents.



Documents are added to the default PageKeeper folder when you use the PK Scan button, choose *Send To* in a document's shortcut menu, or drag and drop a document onto a PageKeeper shortcut.

Adding Documents to PageKeeper

You can use PageKeeper as the central access point to the documents you use on a regular basis. You can scan paper documents into PageKeeper and add existing electronic documents, such as word-processing files and Web pages.

This section contains the following topics:

- Document Thumbnails
- Scanning Documents into PageKeeper
- Automatic Scanning with an ADF
- Adding Documents from Disk
- Adding Documents from the World Wide Web

Document Thumbnails

During the process of scanning or adding a document to PageKeeper, a temporary thumbnail is displayed on the PageKeeper desktop.



When the job is complete, the temporary thumbnail is replaced by a thumbnail sketch of the first page of the document.



Thumbnail of a scanned document

Scanned documents will display in PageKeeper exactly as they are scanned. They can include text, graphics, or a combination of both.

Word-processing documents, Web pages, and other text-based documents will not display graphics in PageKeeper. Blank spots are displayed in place of graphics in thumbnail representations and in PageKeeper View. To see a document's graphics, open it in its source application. See page 53 for more information.

Scanning Documents into PageKeeper

You can scan paper documents directly into a folder on the PageKeeper desktop. Or, you can use the PK Scan button to scan into a default PageKeeper folder.

Scanned documents are saved to disk in the image file format and folder location specified in the *Save Image* section of the Options dialog box. Links to the image files are added to the specified PageKeeper folder.



To use your scanner with PageKeeper, the Scan Manager must be installed. See page 14 for instructions.

To scan from the PageKeeper desktop:

- 1 Select the desired settings in the Options dialog box. See “Selecting PageKeeper Settings” on page 34 for more information.



If you want to be prompted to add text annotations to scanned pages, select that setting in the *New Documents* section of the Options dialog box. Text annotations are useful for finding documents later.

- 2 Open the PageKeeper folder where you want to add the scanned document.
- 3 Place the document you want to scan in your scanner.
- 4 Choose *New ▶ Document from Scanner* in the File menu.
Or, click the New Document from Scanner button.



For some scanners, a separate dialog box appears that you must use to finish scanning your document. If this occurs, follow the instructions in the dialog box.

- 5 Type in some text to annotate the scanned image if you are prompted to do so.
The scanned document is added to the currently open folder with a default name of *ImageN* where *N* is a number. Rename the document as desired.

To scan with the PK Scan button:

- 1 Choose *Start* ▶ *Programs* ▶ *Caere Applications* ▶ *PageKeeper Scan* in the Windows taskbar to open the PK Scan button.



- 2 Click the Options button if you want to select options before scanning.
- 3 Place the document you want to scan in your scanner.
- 4 Click the Scan button to start scanning.
- 5 Type in some text to annotate the scanned image if you are prompted to do so.

The scanned document is added to the default folder selected in the *New Documents* section of the Options dialog box. It has a default name of *ImageN* where *N* is a number. Rename the document as desired.

Automatic Scanning with an ADF

If your scanner has an automatic document feeder (ADF), you can set up PageKeeper to automatically scan and add pages that are placed in the ADF.

To set up automatic scanning:

- 1 Choose *Options...* in the Tools menu.
- 2 Click the *Scanner* tab in the Options dialog box.
- 3 Select *Auto-detect pages in ADF* .
- 4 Click *OK*.

To start automatic scanning:

- 1 Choose *Start* ▶ *Programs* ▶ *Caere Applications* ▶ *PageKeeper Scan* in the Windows taskbar to open the PK Scan button.



The PK Scan button must be open to use the automatic scanning feature. However, the PageKeeper desktop does *not* need to be open.

- 2 Place one or more pages in your scanner's ADF. PageKeeper starts scanning as soon as the pages are detected. The scanned document is added to the folder selected in the *New Documents* section of the Options dialog box.



When the *Auto-detect pages in ADF* option is selected and the PK Scan button is open, PageKeeper takes control over your scanner. To use your scanner with other applications, deselect *Auto-detect pages in ADF* or close the PK Scan button.

Adding Documents from Disk

You can add existing electronic documents, such as word-processing files, to PageKeeper's folder system.

When you add documents to PageKeeper, you are not adding physical files. Rather, you are creating links to document files on your computer. In this manual, the document files on your computer are referred to as *source documents*.



Things that you do to documents in PageKeeper do not affect the source documents in any way. For example, if you rename a document in PageKeeper, the name of the source document is not affected. Only the link in PageKeeper is renamed.

Document Tracking

As you make changes, such as edits to content, to the source documents on your local hard disk, PageKeeper automatically updates the thumbnails associated with those documents. If you move or rename a source document on your local hard disk, PageKeeper will also keep track of those changes and update its link to the document.

In order to keep track of document changes, the PageKeeper Jobs application must be running in the background. If PageKeeper loses its link to a source document, you will be prompted to reestablish the link the next time you try to work with that document in PageKeeper.



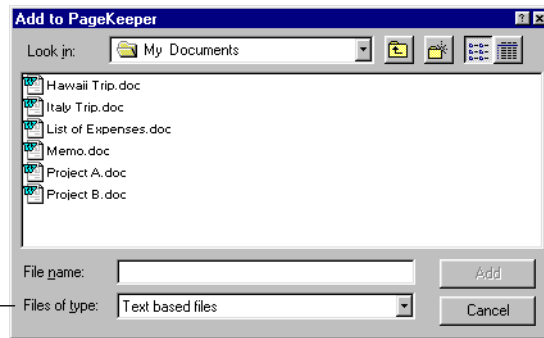
PageKeeper does *not* keep track of changes to source documents located on a network or on removable media such as floppy disks or Zip drives.

To add a document from disk:

- 1 Open the PageKeeper folder where you want to add the document.
- 2 Choose *New* ▶ *Document from Disk* in the File menu.
Or, click the New Document from Disk button.
The Add to PageKeeper dialog box appears.



Select whether you want to add text-based files or image-based files.



- 3 Select the documents you want to add.
You can Ctrl-click to select more than one document in a folder.
See page 72 for a list of supported document types.
- 4 Click *Add* to add the selected documents to PageKeeper.
You are prompted to enter a text annotation for image files if that setting is selected in the *New Documents* section of the Options dialog box.
- 5 Type in some text to annotate an image file if you are prompted, and click *OK*.
Thumbnails representing the selected documents are added to the currently open folder.

Shortcuts for Adding Documents:

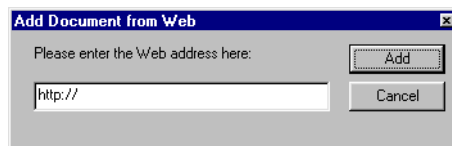
- You can drag a document from the Windows desktop or Windows Explorer directly into a PageKeeper folder.
- You can click your right mouse button over a document on the Windows desktop or Explorer and choose *Send To* ▶ *PageKeeper* in the shortcut menu to send the document to PageKeeper's default folder.
- You can drag a document onto the PageKeeper application icon to send the document to PageKeeper's default folder.

Adding Documents from the World Wide Web

If you have access to the World Wide Web, you can add text from Web pages to PageKeeper. PageKeeper does not keep track of changes to Web pages. However, it keeps a link to the live Web page so you can go there directly from PageKeeper.

To add Web pages to PageKeeper:

- 1 Make sure your computer is currently connected to the Web.
- 2 Open the PageKeeper folder where you want to add the document.
- 3 Choose *New* ▶ *Document from Web* in the File menu.
Or, click the New Document from Web button.
The Add Document from Web dialog box appears.



- 4 Type in the full address of the Web page you want to add.
You can also copy the address and paste it into the edit box.
- 5 Click *Add* to add the page to the current folder.
A thumbnail representing the Web page is added to PageKeeper.

Shortcut for adding Web documents from a Netscape Browser:

- 1 Open the PageKeeper folder where you want to add the document.
- 2 Open your Netscape browser and go to the Web page you want to add.
- 3 Select the Quick Link icon to the left of the Web page address.
- 4 Drag the icon to the open folder in PageKeeper.



To open a live Web page from the PageKeeper desktop, select the document and choose *Open* in the File menu. If you are connected to the Web, your Web browser will launch and go to the Web page address.

Organizing Documents

Once documents are added to PageKeeper, you can organize them into folders and clipped groups. You can also copy, move, rename, and remove items.

Creating Folders

My Folders is PageKeeper's top-level folder. This folder cannot be deleted, but it can be renamed. You can create a structure of folders within *My Folders*.



The folder structure in PageKeeper is similar to Windows Explorer. However, these two folder systems are not related in any way. They are independent of each other.

To create a folder in PageKeeper:

- 1 Start PageKeeper to display the PageKeeper desktop.
- 2 Open the folder in which you want to create a new folder.
- 3 Choose *New ▶ Folder* in the File menu.
Or, click the New Folder button.
The new folder appears with its default name highlighted.
- 4 Type in a new name for the folder if desired.



To open a folder, do one of the following:

- Click the folder name on the left side of the PageKeeper desktop.
- Double-click the folder name on the right side of the PageKeeper desktop.

The contents of the currently open folder are displayed on the right side of the PageKeeper desktop.

Clipping Documents Together

Documents can be associated in PageKeeper by “clipping” them together. For example, if you did an expense report in your word processor and then scanned some receipts related to the report, you can clip all these documents together in PageKeeper without altering anything about the individual documents.

Clipping documents together gives you the advantage of keeping particular documents in a group without having to create a lot of different folders. For example, you can have one folder called *Expenses* that contains many different clipped groups of expense reports.

To clip documents together:

- 1 Click a document on the PageKeeper desktop to select it.
- 2 Ctrl-click to select additional documents.
- 3 Choose *Clip Documents Together* in the Tools menu.



Or, click the Clip Documents Together button.

The selected documents are grouped together and a thumbnail appears indicating that it is a clipped group.



The first page of the top document is displayed in the thumbnail.

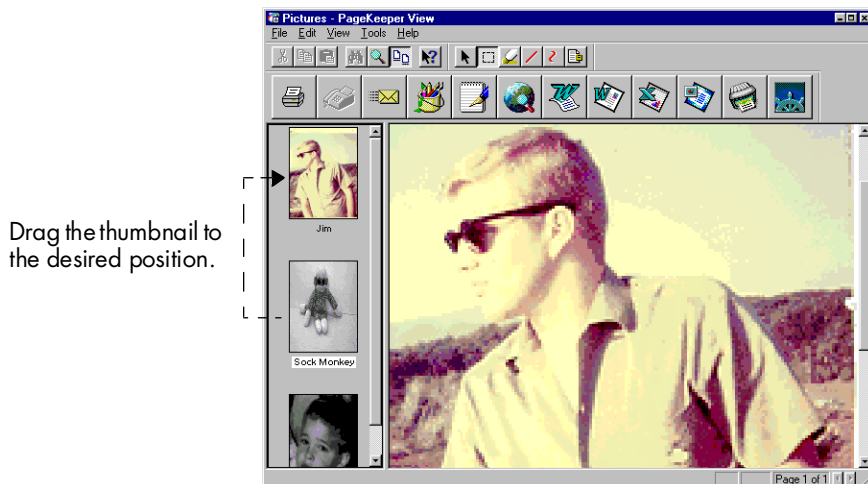
- 4 Type in a new name for the clipped group if desired.



You can also clip documents together by selecting a document and dragging it onto another document. If you drag a document onto an existing clipped group, the document will be placed at the bottom of the group. A document can only appear once in a particular clipped group.

To reorder documents in a clipped group:

- 1 Double-click the clipped group to open it in PageKeeper View.
- 2 Click the thumbnail of the document you want to move and drag it above or below another document in the group.



Or, click your right mouse button over the thumbnail and choose one of these commands: *Move Up One Position* , *Move Down One Position* , *Move to Top* , or *Move to Bottom*.

- 3 Repeat step 2 to reorder other documents as desired.

To remove an individual document from a clipped group:

- 1 Double-click the clipped group to open it in PageKeeper View.
- 2 Click the thumbnail of the document you want to remove from the group.
- 3 Choose *Remove from Clipped Group* in the File menu.
The selected document is removed from the clipped group and placed as a single document in the same folder.

To unclip documents:

- 1 Select the clipped group on the PageKeeper desktop.
- 2 Choose *Unclip Documents* in the Tools menu.



Or, click the Unclip Documents button.
The thumbnail for the clipped group disappears and thumbnails for each individual document appear.

Rearranging Items in PageKeeper

You can rearrange documents, folders, and clipped groups in different PageKeeper folders by copying or moving them.

Copying a folder in PageKeeper is similar to copying a folder in Windows Explorer. The selected folder and all its contents are copied. The copied folder becomes an independent entity when pasted elsewhere.

However, copying documents and clipped groups in PageKeeper is different than copying documents in Windows Explorer. All copies of a document or clipped group are linked together. If you modify (such as by renaming or annotating) a document or clipped group, the changes are reflected in all other copies.



If you have more than one copy of a clipped group, the only time an action will be independently applied to an individual copy is if you unclip it. Other copies of the clipped group will remain intact.

To copy items on the PageKeeper desktop:



- 1 Select the items that you want to copy.
- 2 Choose *Copy* in the Edit menu. Or, click the Copy button.
A copy of the selected items is placed on the Clipboard.



- 3 Open the folder where you want to place the items.
- 4 Choose *Paste* in the Edit menu. Or, click the Paste button.
The items are placed into the open folder.

To move items on the PageKeeper desktop:



- 1 Select the items that you want to move.
- 2 Choose *Cut* in the Edit menu. Or, click the Cut button.
The selected items are removed and placed on the Clipboard.



- 3 Open the folder where you want to move the items.
- 4 Choose *Paste* in the Edit menu. Or, click the Paste button.
The items are moved into the open folder.



You can also move items by dragging them into other folders. To make copies of items, press the **Ctrl** key as you drag them.

Renaming Items

You can rename folders, documents, and clipped groups in PageKeeper.

Renaming a document in PageKeeper does *not* affect the name of the source document — only the link in PageKeeper is renamed. To find out the name of the source document, click your right mouse button over the document and choose *Properties*

To rename an item in PageKeeper:

- 1 Select the item you want to rename.
- 2 Choose *Rename* in the File menu.
Or, click inside the selected item's name box.
- 3 Type in the desired name.
- 4 Press the Enter key or click outside the item's name box.
If there are copies of a document or clipped group in other PageKeeper folders, all copies are renamed.

Removing Items

You can remove documents, folders, and clipped groups from PageKeeper. The only item you cannot remove is PageKeeper's top-level folder.



Removing a document from PageKeeper does *not* delete the source document from your computer. Only the link in PageKeeper is deleted.

Since copies of documents and clipped groups can be kept in multiple folders, you have the choice of removing just the selected instance of an item or all instances of the item from PageKeeper.

To remove one instance of an item:

- 1 Select the item on the PageKeeper desktop.
If you select a folder to remove, all the items within the folder are also removed.
- 2 Do one of the following:
 - Press the Delete key.
 - Choose *Remove ▶ from Folder* in the File menu.
 - Click the Remove from Folder button.



If you selected a document or clipped group, only that instance of the item is removed. Copies in other folders remain as is.

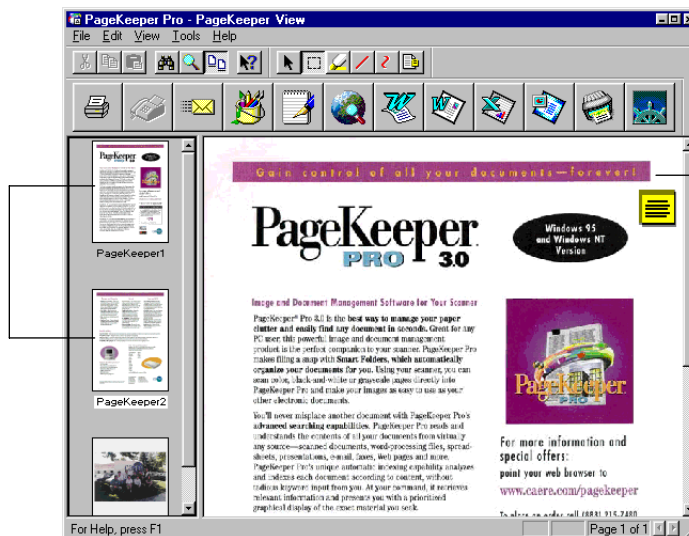
To remove all copies of a document or clipped group from PageKeeper:

- 1 Select the item on the PageKeeper desktop.
- 2 Choose *Remove ▶ from PageKeeper* in the File menu.
All copies of the item are removed from PageKeeper.

Viewing Documents

PageKeeper View allows you to view the contents of documents without having to open their source applications. You cannot edit documents in PageKeeper View, but you can copy their contents and add annotations to them.

Thumbnails allow you to view each document in a clipped group. Click the thumbnail of the document you want to display.



The content of the current document is displayed on the right side of the viewer.

To open a document or clipped group in PageKeeper View:



- 1 Select the document or clipped group that you want to open.
- 2 Choose *PageKeeper View* in the File menu. Or, click the PageKeeper View button.
PageKeeper View opens. If you selected multiple documents, each document is displayed in a separate viewer. If you selected a clipped group, all documents in the group are displayed in the same viewer.

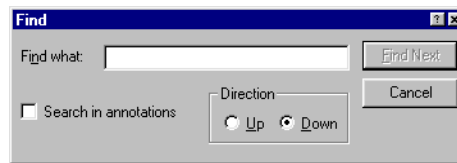


Blank spots are displayed in place of graphics in word-processing documents, Web pages, and other text-based documents. To see a document's graphics, open it in its source application. See page 53 for more information.

To find text in a document in PageKeeper View:



- 1 Choose *Find...* in the Edit menu. Or, click the Find Text button. The Find dialog box appears.



- 2 Enter the exact text you want to find.
The search is not case-sensitive, so you will get the same results using uppercase or lowercase letters.
- 3 Select *Search in annotations* if you also want to search for text within annotations.



If you are viewing an image document that does not have background OCR information, you can only search for text contained within its annotations.

- 4 Click *Find Next* to locate the first occurrence of the search word.
- 5 Continue clicking *Find Next* to find subsequent occurrences of the word.

To copy the contents of a document to the Clipboard:

- 1 Open the document in PageKeeper View.
- 2 Click anywhere in the content area of the displayed document to make the Annotation toolbar active.



- 3 Click the Select Content button.

- 4 Select the area of the document you want to copy.

If you are viewing an image document, the selected area has a box around it. If you are viewing a text document, the selected area is highlighted.



- 5 Click the Copy button.

A copy of the selected area is placed on the Clipboard.

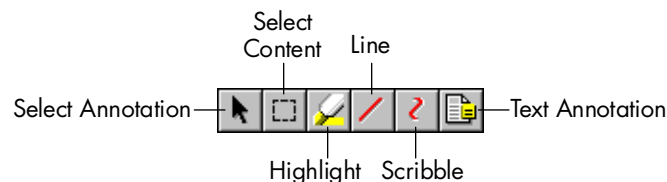
- When you copy an area of a text-based document, you can paste it into text applications.
- When you copy an area of an image document that has background OCR information, you can paste the contents into text applications or graphic applications. A text application will receive the contents as editable text. A graphic application will receive the contents as a graphic.
- When you copy an area of an image that does not have background OCR information, you can only paste the contents into graphic applications.

Annotating Documents

You cannot edit documents directly in PageKeeper View, but you can add the following types of annotations to them:

- Text annotations
- Yellow highlights
- Lines (image-based documents only)
- Freehand scribbles (image-based documents only)

Use the buttons in the Annotation toolbar to make annotations:





The annotations that you make on documents *do not* affect the source documents. Annotations are only visible in PageKeeper View.

To add text annotations to a document:



- 1 Click the Text Annotation button.
If the Annotation toolbar is not active, click anywhere in the document's content area.
 - 2 Click the area of the document where you want the annotation marker to appear.
A yellow text box appears with the cursor ready for typing.
 - 3 Type in the desired text.
-



You can find the document later by searching for its text annotation, so use meaningful text such as a project name or other key words.

- 4 Click outside of the text box when you are done.
A yellow text icon represents the annotation. Double-click the icon to open the annotation. Click outside the open annotation to close it again.

To highlight areas of a document:



- 1 Click the Highlight button.
If the Annotation toolbar is not active, click anywhere in the document's content area.
- 2 Select the area of the document you want to highlight.
Yellow highlights appear over the areas you select.
- 3 Click the Select Annotation button to stop highlighting.



You can only draw lines and freehand scribbles on image-based documents such as TIFF or PCX files.

To draw lines on an image document:



- 1 Click the Line button.
If the Annotation toolbar is not active, click anywhere in the document's content area.
- 2 Draw lines wherever you want in the document.
Lines appear in red.



- 3 Click the Select Annotation button to stop drawing.

To draw freehand scribbles on an image document:



- 1 Click the Scribble button.
If the Annotation toolbar is not active, click anywhere in the document's content area.
- 2 Draw free-hand circles, scribbles, and other shapes wherever you want in the document.
Scribbles appear in red.



- 3 Click the Select Annotation button to stop drawing.

To delete annotations:



- 1 Click the Select Annotation button.
If the Annotation toolbar is not active, click anywhere in the document's content area.
- 2 Select the annotation you want to delete by clicking it.



To select multiple line, scribble, and highlight annotations at once in an image document, hold down your mouse button and draw a box around them.

Line, scribble, and highlight annotations are surrounded by a box when they are selected. Text annotations turn red when they are selected.

- 3 Press the Delete key.
The selected annotations disappear.

Opening Documents for Editing

You can open documents for editing in their source applications or in other applications.

Opening Documents in Their Source Applications

A document's *source application* is the application in which it was created. For example, Microsoft Word is the source application of a Word document. Edits that you make to a document in its source application are updated in PageKeeper as long as the document's file name and folder location remain unchanged.



PageKeeper determines a document's source application by its file name extension and the application that is associated with that extension in Windows.

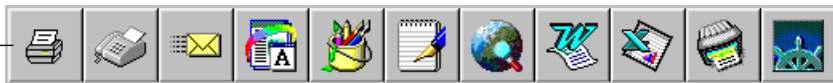
To open a document in its source application:

- 1 Select the document you want to open on the PageKeeper desktop.
Or, open the document in PageKeeper View. If you have a clipped group of documents open in PageKeeper View, click the thumbnail of the document you want to open.
- 2 Choose *Open* in the File menu if you selected a document on the PageKeeper desktop.
Choose *Open Document for Editing* in the File menu if the document is open in PageKeeper View.
Choose *Open Current Document for Editing* if a clipped group is open in PageKeeper View.
The document's source application launches and displays the document.

Opening Documents in Other Applications

Use the buttons on the Application toolbar to open documents in various applications.

On first launch, PageKeeper looks for the major applications installed on your computer and adds them to the Application toolbar.



Use the application buttons to open documents in different applications. To add or remove application buttons, see "Customizing the Application Toolbar" on page 68.

The format that an application uses to open documents depends on the button properties selected for that application. See page 69 for information on changing button properties.

Not all documents can be opened in all applications. A document must be in a format (or able to be converted to a format) that the application supports. For example, you cannot open a text document in Microsoft Paint (an image-editing application).



You can open the textual content of images in text-based applications if the images have background OCR information.

To open a document in another application:

- 1 Select the document you want to open on the PageKeeper desktop.
Or, open the document in PageKeeper View.
- 2 Click the button in the Application toolbar of the application in which you want to open the document.
The application opens the selected document. If you selected a clipped group of documents, each document is opened as a separate document in the application.



If a document is converted to a file format different than its original file format, the document is opened with a different file name. Therefore, changes that you make will not affect the original document or the document link in PageKeeper.

Printing, Faxing, and Mailing Documents

You can print, mail, and fax documents from PageKeeper if you have the appropriate applications set up on your computer.



Printing and faxing a document from PageKeeper will not be as exact as printing and faxing from the document's source application. Documents printed or faxed from PageKeeper will appear as they would in PageKeeper View.

Printing a Document from PageKeeper

You can print documents or clipped groups from the PageKeeper desktop, PageKeeper View, and the PageKeeper Find window.

To print a document or clipped group:

- 1 Select the document or clipped group you want to print.
If a clipped group of documents is open in PageKeeper View, click the thumbnail of the document you want to print.
- 2 Click the Print button or choose *Print...* in the File menu.
If you have a clipped group of documents open in PageKeeper View, choose *Print...* ▶ *Current Document* or *Print...* ▶ *All Documents*.
- 3 Select the desired print options in the Print dialog box.
If you select *Print annotations*, text annotations will be printed on separate pages.
- 4 Click *OK* to start printing.



Faxing a Document from PageKeeper

You can fax documents directly from the PageKeeper desktop or PageKeeper View if you have a fax modem or multi-function device and a fax application that provides a standard print driver.

To fax a document:

- 1 Select the document or clipped group you want to fax.
If a clipped group of documents is open in PageKeeper View, click the thumbnail of the document you want to fax.
- 2 Click the Send Fax button on the Application toolbar.
Or, choose *Send To* ▶ *Fax Recipient* in the File menu.



- 3 Select the desired options in the Fax dialog box and click *OK*.
An interface to your fax application appears.
- 4 Enter the recipient information and then send the fax.

Mailing a Document from PageKeeper

You can send documents to other users from the PageKeeper desktop or PageKeeper View if you have a MAPI-compliant mail application such as Microsoft Outlook.

To mail a document:

- 1 Select the document or clipped group you want to mail.
If a clipped group of documents is open in PageKeeper View, click the thumbnail of the document you want to mail.
- 2 Click the Send Mail button.
Or, choose *Send to* ▶ *Mail Recipient* in the File menu.
The Send To dialog box appears.
- 3 Select an option for sending your document.
You can send the source document alone. Or, you can send PageKeeper information, such as annotations, along with the source document.



If you send a document with PageKeeper information, a special *PageKeeper Send File* (*.stp) will be sent. The recipient of the PageKeeper Send File must have PageKeeper installed to view the file. See “Working with PageKeeper Send Files” on page 67 for more information.

- 4 Click *OK*.
An interface to your mail application appears with the document attached.
- 5 Enter the recipient information and send the mail message.

Finding Documents

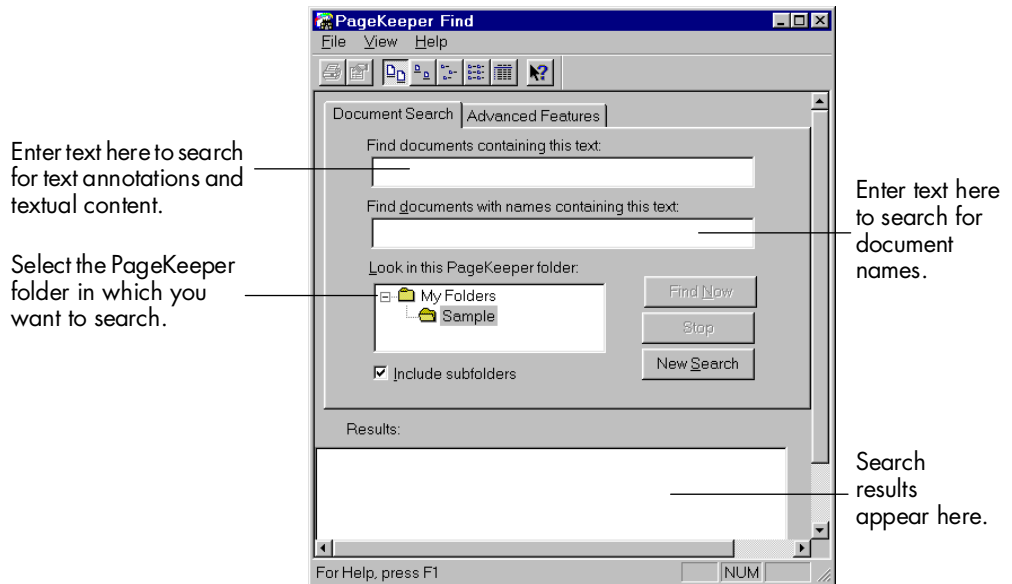
PageKeeper can find any document that has been added to it. You can start a search from PageKeeper's desktop or from the Windows taskbar. Your search criteria can include document names, text annotations, and textual content.

To search for documents:

- 1 Do one of the following to open the PageKeeper Find window:
 - Choose *PageKeeper Find...* in the Tools menu.
 - Click the PageKeeper Find button.



- Click *Start* in the Windows taskbar and choose *Find* ▶ *PageKeeper Find...* .
- Click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Find* .



- 2 Type in search text for one or both of the following:
 - Text contained within the document's content or an attached text annotation (type in the exact text you expect to find)

- Text contained within the document name (the search does *not* cover names of folders or clipped groups)
-



PageKeeper only searches for documents that match all the criteria you specify.

The search is not case-sensitive, so you will get the same results using uppercase or lowercase letters.

- 3 Select the PageKeeper folder in which you want to search. Select *Include subfolders* if you also want to search folders within the selected folder.
- 4 Click *Find Now* to start the search. PageKeeper lists all documents that meet the search criteria. To find out information about a found document, click your right mouse button over the document and choose *Properties*.



Technical Information

This chapter provides troubleshooting tips and other technical information about using PageKeeper.

Please also read the *PageKeeper Readme* file, which contains the latest information on PageKeeper. To open this file, click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *PageKeeper Readme* .

Please continue reading this chapter for information on these topics:

- Troubleshooting Solutions
- Scanner Setup Issues
- Performing Background OCR on Images
- Working with PageKeeper Send Files
- Customizing the Application Toolbar
- Checking PageKeeper Jobs
- Supported Document Types
- Uninstalling PageKeeper

Troubleshooting Solutions

Although PageKeeper is designed to be easy to use, problems may sometimes occur. Many of the onscreen error messages contain self-explanatory descriptions of what to do — check connections, close other applications to free up memory, and so on. Sometimes that is all the troubleshooting help you will need.

Topics in this section include:

- Solutions to Try First
- Thumbnails That Indicate Problems
- Low Disk Space Problems
- Low Memory Problems



Please refer to your Windows documentation for information on optimizing your system and application performance.

Solutions to Try First

Try these possible solutions if you experience problems using PageKeeper:

- Make sure that your system meets all the minimum requirements listed on page 12.
- Make sure that your scanner is plugged in and that all cable connections are secure.
- Turn off your computer and scanner. Restart the scanner, and then restart the computer.
- Make sure other applications are functioning properly after restarting your computer.
- Resolve low memory problems. See page 62 for suggestions.
- Resolve low disk space problems. See page 61 for suggestions.
- Run ScanDisk for Windows 95 or Check Disk for Windows NT to check your hard disk for errors. See Windows online help for more information.
- Defragment your hard disk. See Windows online help for more information.
- Make sure you have the correct drivers for your scanner, printer, and video card. Contact their manufacturers for more information.
- Uninstall and reinstall PageKeeper and the Scan Manager. See “Uninstalling PageKeeper” on page 74 for instructions.

Thumbnails That Indicate Problems

The following thumbnail displayed in PageKeeper indicates that there was a problem scanning or adding a document.



Possible causes for problems scanning or adding a document to PageKeeper:

- You tried to add an unsupported document type. See page 72 to see if the document type you are trying to add is supported by PageKeeper.
- Your computer is running low on available memory. See page 62 for information on resolving low memory problems and then try adding or scanning the document again.
- Your computer is running low on available disk space. See the next section for information on resolving low disk space problems and then try adding or scanning the document again.



After resolving the problem, you should delete the problem thumbnail. To do so, select the thumbnail and press the Delete key.

Low Disk Space Problems

Problems may occur if your system runs low on free disk space. Try these solutions for low disk space problems:

- Empty the Windows Recycle Bin.
- Delete the *.tmp files in the Temp folder located in your Windows folder.
- Delete the *.tmp files in the Temp folder located in PageKeeper's installation folder.
- Run ScanDisk for Windows 95 or Check Disk for Windows NT to check for errors that may be using up disk space. See Windows online help for more information.
- Defragment your hard disk. See Windows online help for instructions.
- Remove applications that you do not use.

Low Memory Problems

PageKeeper may run poorly under low memory conditions. This may be indicated by out-of-memory messages, unexpected errors, or operations that take a long time. Try these solutions for low memory conditions:

- Close other open applications to free up memory.
- Close unnecessary PageKeeper windows.
- Restart your computer.
- Defragment your hard disk. See Windows online help for instructions.
- Increase the amount of free hard disk space on your computer.
- Increase your computer's physical memory (RAM).

Scanner Setup Issues

This section contains information on scanner setup and solutions for scanning problems you may encounter.

Topics in this section include:

- Scanner Drivers Supplied by the Manufacturer
- Scanner Drivers Supplied by Caere
- Problems Connecting PageKeeper to Your Scanner
- System Crash Occurs While Scanning
- Using TWAIN-Compliant Scanners



Please also refer to your scanner documentation for information on resolving scanner problems.

Scanner Drivers Supplied by the Manufacturer

Many scanners are shipped with one or more *scanner drivers*. This is software that allows your computer to communicate with your scanner. Some scanners do not require drivers and other scanners require more than one driver. Please refer to your scanner documentation for information about installing any required scanner drivers.

Make sure that your scanner and scanner driver are properly installed and configured before installing PageKeeper. Like all software, scanner drivers are periodically updated. Make sure that you have installed the correct scanner driver supplied by the manufacturer.

Scanner Drivers Supplied by Caere

PageKeeper is shipped with special scanner drivers that allow it to communicate with supported scanners. These scanner driver files are installed on your computer when you install the Caere Scan Manager. The drivers often work in conjunction with the drivers from your scanner manufacturer.

To use your scanner with PageKeeper, you must install the Scan Manager and select your scanner. See "Setting Up Your Scanner with PageKeeper" on page 14 for more information.



If you received PageKeeper on a CD-ROM provided with your scanner, the Caere Scan Manager might only contain the scanner driver for your particular scanner.

Problems Connecting PageKeeper to Your Scanner

Try these solutions if you cannot get your scanner to work with PageKeeper.

- Make sure the scanner is supported by PageKeeper with your version of Windows 95 or Windows NT.
- Make sure the Scan Manager is installed and that you selected the correct scanner in the Scan Manager.
See "Setting Up Your Scanner with PageKeeper" on page 14.
- Make sure you have installed the correct scanner driver supplied by the scanner manufacturer.
- Make sure your scanner is turned on and connected securely before you start PageKeeper.
Some scanners drivers must be loaded at startup. In this case, restart your scanner and then restart your computer.
- Make sure the scanner is not in use by another application. Close other applications that might be conflicting.
- Uninstall and then reinstall the Scan Manager.

System Crash Occurs While Scanning

Try these solutions if a crash occurs during a scan:

- Turn your scanner off and on again to return the scanner to its default state. Then restart your computer.
- Check your scanner setup. See the previous section, "Problems Connecting PageKeeper to Your Scanner," for more information.

- Close any applications that might be conflicting with scanning in PageKeeper.
- Resolve low memory problems. See “Low Memory Problems” on page 62 for more information.
- Resolve low disk space problems. See “Low Disk Space Problems” on page 61 for more information.
- Check the *TWAIN Scanner Settings* tab in the Scan Manager if you are using a TWAIN scanner.
- Check with the scanner manufacturer to make sure you have the correct driver for your scanner.

Using TWAIN-Compliant Scanners

PageKeeper supports TWAIN-compliant scanners. If you select a TWAIN scanner during installation of the Caere Scan Manager, you will be prompted to select your TWAIN data source the first time you scan in PageKeeper.



Before setting up a TWAIN scanner with PageKeeper, make sure that you have installed the TWAIN software from your scanner manufacturer. Do not run other TWAIN-compliant applications while using or installing a TWAIN scanner with PageKeeper.

Use the following procedure if you want to change to a TWAIN-compliant scanner after the Scan Manager is installed.

To change to a TWAIN-compliant scanner:

- 1 Exit PageKeeper if it is open.
- 2 Click *Start* in the Windows taskbar and choose *Settings* ▶ *Control Panel* .
- 3 Double-click the *Caere Scan Manager* icon.
- 4 Select a TWAIN scanner in the *Supported Scanners* list box. If your scanner does not appear in the *Supported Scanners* list box, select *TWAIN scanner* .
- 5 Click *Set as Current Scanner* .
- 6 Click *Apply*. You may be prompted to insert the CD-ROM in the CD-ROM drive and select the directory containing the files that need to be installed.
- 7 Click *Close* to close the Scan Manager when you are finished.

You will be prompted to select your TWAIN data source the next time you scan in PageKeeper.

Performing Background OCR on Images

An image, such as a scanned paper document, normally does not have editable text characters — it is only a picture. However, PageKeeper's *optical character recognition* (OCR) technology can produce editable and searchable text information in images. PageKeeper can perform OCR at the time you scan pages or add image files to it. Make sure *Perform OCR* is selected in the New Documents section of the Options dialog box.

OCR allows you to do the following:

- Find images based on their textual content
- Find specific text in an image that is displayed in PageKeeper View
- Select a textual area of an image that is displayed in PageKeeper View and copy it to the Clipboard as editable text
- Open images as editable text in text-based applications



Performing OCR on an image does not change the image itself. Text information is stored in the background. To find out if an image has background text available, look at its document properties.

Image quality required for OCR

The following table describes the image resolutions required for performing OCR on scanned pages and image files.

When scanning pages:	When adding image files:
200 or 300 dpi grayscale	200 or greater dpi grayscale
200 or 300 dpi black and white	200 or greater dpi black and white
150, 100, or 75 dpi color	200 or greater dpi color

Improving OCR Accuracy

High OCR accuracy enhances your results when searching for images in PageKeeper. The following are ways to increase OCR accuracy.

Install OmniPage Pro Version 8.0 (or later)

If you install OmniPage Pro, Caere's most accurate and powerful OCR software, PageKeeper will automatically use OmniPage Pro's advanced OCR engine. OmniPage Pro's Language Analyst, which corrects spelling errors during OCR, will be enabled for higher accuracy.

PageKeeper will support the OCR languages that you select when you install OmniPage Pro.

Upgrade to PageKeeper Pro 3.0

PageKeeper Pro 3.0 uses the same advanced OCR engine as OmniPage Pro. For more information on PageKeeper Pro, go to Caere's World Wide Web site located at:

<http://www.caere.com/pagekeeper>

Select Settings for Higher Accuracy

Select a grayscale or color scan mode in PageKeeper's Scanner settings if you are scanning poor-quality pages, pages with very small type, or pages with text on colored or shaded backgrounds. If you scan in grayscale, select a high resolution as well. Grayscale and color settings are only available with supported grayscale and color scanners.

If you do not have a grayscale or color scanner, experiment with the Brightness setting in PageKeeper's Scanner settings to get a good scan. Lighten the setting for thick, run-together text characters or dark backgrounds. Darken the setting for thin, broken text characters.

Use High-Quality Images

- Try to scan original documents rather than photocopies. Typeset, high-quality printed page images return the best OCR accuracy. With lesser-quality pages, OCR accuracy may be poorer.
- Ask senders to select Fine or Best Mode when they send you a fax.
- Page images should be free of notes, lines, or doodles. Anything that is not a printed character slows recognition, and any character distorted by a mark will be unrecognizable.



Rather than making annotations on your paper documents, make text, line and scribble annotations in PageKeeper View. PageKeeper annotations do not affect OCR accuracy.

- Text in page images should be reasonably clean and crisp. Characters should be separated from each other and not blotched together or overlapping.
- Text in page images should not be underlined. It is difficult to recognize underlined text because the underline changes the shape of descenders on the letters q, g, y, p, and j.

Working with PageKeeper Send Files

If you send documents as mail attachments or to a floppy disk from PageKeeper, you are prompted to make one of the following choices:

- Send the source document alone
- Send the source document along with PageKeeper information such as annotations

If you send a source document with PageKeeper information, a *PK Send File* (*.stp) is created. This is a special PageKeeper file format that is comprised of the source document file and another file containing PageKeeper information. It can be opened on any computer that has PageKeeper installed.

To open a PK Send File:

- 1 Double-click the PK Send File to open it in PageKeeper View. PageKeeper View displays the content of the source document and any PageKeeper annotations.
- 2 Choose *Open Document for Editing* in the File menu to open the source document in its own application. The source application must be installed on your computer to open the source document.



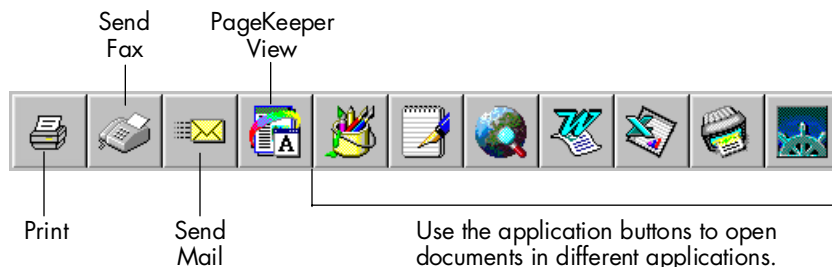
PK Send Files are not managed by PageKeeper unless you add them back to PageKeeper's folder system.

To add a PK Send File to PageKeeper:

- 1 Double-click the PK Send File to open it in PageKeeper View. PageKeeper View displays the content of the source document and any PageKeeper annotations.
- 2 Choose *Add to PageKeeper...* in the File menu. You are prompted to save the source document to a folder location on your computer. It is recommended that you select a folder on your local hard disk so that PageKeeper can keep track of any changes.
- 3 Select a file location for the document and click *Save*. PageKeeper View automatically closes. A link to the saved document is added to the default PageKeeper folder.

Customizing the Application Toolbar

On first launch, PageKeeper looks for the major applications installed on your computer and adds them to the Application toolbar. You can customize the toolbar by adding applications, deleting applications, and modifying the formats that applications will use to open documents.



To add an application button to the toolbar:

- 1 Open PageKeeper so you can see the Application toolbar.
- 2 Click your right mouse button over any area between an existing application button and the boundary of the toolbar.
- 3 Choose *Add Button...* in the menu that appears. The Add Button dialog box appears.
- 4 Locate and select the *.exe file for the application you want to add.
If PageKeeper does not recognize the application, you will be prompted to select button properties for the application.



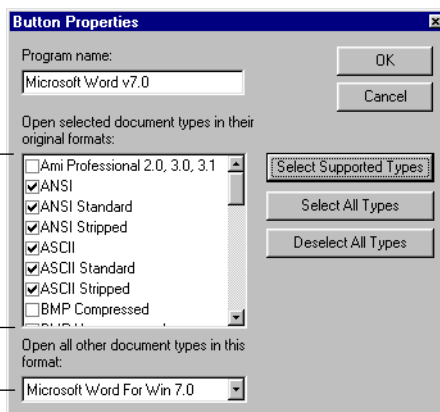
You can also drag application icons from the Windows desktop or Windows Explorer to add them to the Application toolbar.

To change the properties of an application button:

- 1 Place your mouse pointer over the application button and click your right mouse button.
- 2 Choose *Button Properties...* in the menu that appears. The Button Properties dialog box appears.

The application tries to open selected document types using their original file formats.

Document types not selected in the list above will be converted and opened in this file format.



- 3 Change the properties as desired.
- 4 Click *OK*.



If an application converts a document to a different file format when it opens the document, the document will be opened under a different file name. Therefore, edits that you make will not affect the original document or the document link in PageKeeper.

To delete an application button from the toolbar:

- 1 Place your mouse pointer over the application icon and click your right mouse button.
- 2 Choose *Delete [application name]* in the menu that appears. The application button disappears from the toolbar.

Checking PageKeeper Jobs

When you scan or add documents to PageKeeper, they are put into a processing queue. This queue is managed by the PageKeeper Jobs application, which runs in the background.

You normally do not need to display PageKeeper Jobs. However, you may want to check on the status of jobs if you are adding many documents at once or if you are experiencing problems.

To display PageKeeper Jobs:



- 1 Locate the PageKeeper Jobs icon in the Windows taskbar. If the taskbar is horizontal on your screen, the icon is located at the far right corner. If the taskbar is vertical on your screen, the icon is located at the bottom.

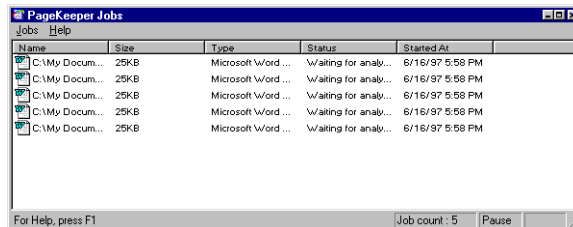


If you cannot find the PageKeeper Jobs icon, the application may be closed. See page 71 for ways to restart it.

- 2 Double-click the PageKeeper Jobs icon. Or, click your right mouse button over it and choose *Display Jobs* in the shortcut menu.

The PageKeeper Jobs window opens.

The current jobs are listed in the order they are being processed.



- 3 Choose *Hide Jobs* in the Jobs menu to hide PageKeeper Jobs.



The PageKeeper Jobs application starts up with your computer and runs in the background so it can keep track of document changes. If you close PageKeeper Jobs, changes will not be tracked and all current jobs will be paused. Therefore, it is recommended that you hide the PageKeeper Jobs window rather than close it.

You can restart PageKeeper Jobs in the following ways:

- Click *Start* in the Windows taskbar and choose *Programs* ▶ *StartUp* ▶ *PageKeeper Jobs* .
- Restart your computer.
- Scan or add a document to PageKeeper.

To change the processing order of jobs:

- 1 Display PageKeeper Jobs.
See page 70 for instructions.
- 2 Click a job to select it.
- 3 Choose one of these commands in the Jobs menu:
 - *Move to Top*
 - *Move Up One Position*
 - *Move Down One Position*
 - *Move to Bottom*
- 4 Repeat steps 2 and 3 for other jobs as desired.
- 5 Choose *Hide Jobs* in the Jobs menu to hide PageKeeper Jobs.

To cancel a job:

- 1 Display PageKeeper Jobs.
See page 70 for instructions.
- 2 Click a job to select it.
- 3 Choose *Delete* in the Jobs menu.
The job disappears from the list and will not be processed.
- 4 Choose *Hide Jobs* in the Jobs menu to hide PageKeeper Jobs.

To pause processing of all jobs:

- 1 Locate the PageKeeper Jobs icon in Windows taskbar.
- 2 Click your right mouse button over the icon and choose *Pause Processing* in the shortcut menu.
All PageKeeper jobs will stop until you resume processing.

To resume processing of all jobs:

- 1 Locate the PageKeeper Jobs icon in the Windows taskbar.
- 2 Click your right mouse button over the icon and choose *Resume Processing* in the shortcut menu.

Supported Document Types

This section lists the document types that can be added to and exported from PageKeeper.

Import Formats

You can add the following document types to PageKeeper's folder system. See "Adding Documents to PageKeeper" on page 37 for instructions.

You can add these types of image documents to PageKeeper:

Adobe PDF (*.pdf)	PC Paintbrush Multi-page (*.dcm)
FlashPix (*.fpx)	Photoshop (*.psd)
GIF (*.gif)	TIFF: Uncompressed, Packbits, Multi-page Packbits, G4 Fax (*.tif)
JPEG (*.jpg)	Windows Bitmap (*.bmp)
PC Paintbrush (*.pcx)	

You can add these types of text documents to PageKeeper:

Ami Professional 2.0, 3.0, 3.1 (*.sam)	Microsoft Rich Text Format (*.rtf)
ANSI, ANSI Standard, ANSI Stripped (*.txt)	Microsoft Word for Windows 6.0, 7.0 (*.doc)
ASCII, ASCII Standard, ASCII Stripped (*.txt)	Microsoft Write for Windows 3.x (*.wri)
ASCII Comma Delimited (*.csv)	OmniPage Document 7.0, 8.0 (*.met)
HTML Levels 1-3 (*.htm)	Quattro Pro 1.0 (*.wb1)
Lotus 1-2-3 4.0, 5.0 (*.wk1, *.wk3, *.wk4)	WordPerfect for Windows 6.1, 7.0 (*.wpd)
Microsoft Excel for Windows 5.0, 7.0 (*.xls)	

Export Formats

You can open documents in applications that support the following application formats. See “Opening Documents in Other Applications” on page 54 for more information.

You can export documents in these image application formats:

FlashPix (*.fpx)	PC Paintbrush Multi-page (*.dcm)
GIF (*.gif)	Photoshop (*.psd)
JPEG (*.jpg)	TIFF: Uncompressed, Packbits, Multi-page Packbits, Multi-page G4 Fax (*.tif)
PC Paintbrush (*.pcx)	Windows Bitmap (*.bmp)

You can export documents in these text application formats:

Ami Professional 2.0, 3.0, 3.1 (*.sam)	Microsoft Rich Text Format (*.rtf)
ANSI, ANSI Standard, ANSI Stripped (*.txt)	Microsoft Word for Windows 6.0, 7.0 (*.doc)
ASCII, ASCII Standard, ASCII Stripped (*.txt)	Microsoft WordPad (*.rtf)
ASCII Comma Delimited (*.csv)	Microsoft Write for Windows 3.x (*.wri)
HTML Level 3 (*.htm)	OmniPage Document 7.0, 8.0 (*.met)
Lotus 123 4.0, 5.0 (*.wk1)	Quattro Pro for Windows 1.0, 5.0 (*.wb1)
Microsoft Excel for Windows 5.0, 7.0 (*.xls)	WordPerfect for Windows 6.1, 7.0 (*.wpd)

Uninstalling PageKeeper

Sometimes uninstalling and then reinstalling PageKeeper and the Scan Manager will solve a problem.



To uninstall from Windows NT, you must be logged in with administrator privileges.

To uninstall PageKeeper:

- 1 Exit PageKeeper.
 - 2 Click *Start* in the Windows taskbar and choose *Programs* ▶ *Caere Applications* ▶ *Uninstall PageKeeper Standard* .
 - 3 Click *Yes* to confirm that you want to remove PageKeeper.
-



PageKeeper's Uninstall program does *not* remove the current database structure (folders, document links, and clipped groups). To delete the database, complete steps 4 through 7. To keep your database intact, skip to step 7.

Deleting PageKeeper's database structure does *not* affect the source documents on your computer unless the source documents are located in the folders that are deleted in step 5.

- 4 Locate PageKeeper's installation folder in Windows Explorer. The default installation folder is `PageKeep30`. This folder does not get removed by the Uninstall program.
- 5 Delete the following subfolders under the installation folder:
 - `\pkdatapath`
 - `\system`
- 6 Locate and delete the following file at the top level of your `c :` drive:
 - `TopassSrv.dat`
- 7 Restart your computer.

Some icons and program files might remain on your system if they have been renamed, modified, or moved to different locations.

To uninstall the Caere Scan Manager:

- 1 Exit PageKeeper.
- 2 Click *Start* in the Windows taskbar and choose *Settings* ▶ *Control Panel*.
- 3 Double-click *Add/Remove Programs* .
- 4 Select *Scan Manager 3.0* and click *Add/Remove* .
- 5 Click *Yes* to confirm that you want to remove the Scan Manager.
- 6 Restart your computer.



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