Scan to PC Desktop Professional 10

Install Instructions

Scan to PC Desktop®

Professional 10

powered by NUANCE

Personalize your Xerox network scanning and your PDF workflow

NUANCE

xerox Platinum Alliance Partner

General information

How to use this document

This document can be used in several ways:

- Xerox customers can use it to learn how to install their Scan to PC Desktop software
- By members of the Xerox sales teams to facilitate installing Scan to PC Desktop Professional 10 onto their own laptops for use during customer demonstrations.
- By Xerox Analysts to install the Scan to PC Desktop Professional 10 software onto the PCs in Xerox demo rooms.

Information about installing Scan to PC Desktop

This document provides instructions for installing the software associated with the desktop PC Client components of Scan to PC Desktop Professional 10. These software components include:

- PaperPort Professional 11
- OmniPage Professional 16
- PDF Converter Professional 5 Enterprise
- Image Retriever Professional 9

Notes:

• Nuance has created a Server Administrator's Guide that contains information about how to install and configure the PSP Server 2.0 server component. This Guide is available for download at http://www.nuance.com/scan2pc and http://www.xerox.com/scan2pc

• Scan to PC Desktop products, including OmniPage, PaperPort, PDF Converter Professional, Image Retriever, and PSP Server are translated into English, French, Italian, German, Spanish, and Brazilian Portuguese. These products are designed to work with an operating system that is properly configured with the corresponding language. Use of these products with operating systems that are configured with non-supported languages is not recommended or supported.

• On Windows 2000, XP, or Vista systems, you should have Administrator privileges to install or later to change, repair or uninstall the product.

Minimum system requirements for Scan to PC Desktop 10

PaperPort Professional 11:

- Microsoft® Windows 2000 SP4 or above, Windows XP SP2 32-bit, Windows Vista 32-bit, Windows Vista 64-bit
- Intel® Pentium® processor or equivalent
- 128 MB RAM, 256 MB RAM or higher recommended
- 300 MB free hard disk space
- Microsoft® Internet Explorer 5.5 or higher (free download available at www.microsoft.com)
- CD-ROM drive (required for installation)
- SVGA monitor with 256 colors, but preferably 16-bit color (called High Color in Windows 2000 and Medium Color in XP and Vista) and 800 x 600 pixel resolution
- A Web connection is required for registration

OmniPage Professional 15:

- Intel® Pentium® III or higher processor or its equivalent. Intel Core Duo, Intel Core 2 Duo or AMD X2 Dual Core 3600+ recommended for advanced performance.
- Windows 2000 (from Service Pack 2), Windows XP 32 bit (from Service Pack 2), Windows XP 64-bit, Windows Vista 32-bit, Windows Vista 64-bit
- Microsoft Internet Explorer 5.5 or higher
- 256 MB of memory (RAM), 1GB recommended for advanced performance.
- 150 MB of free hard disk space for the application files and sample images, plus 70 MB working space during installation. An additional 245 MB for RealSpeakTM Solo speech modules (nine languages)
- 20 MB for ScanSoft PDF Create! and 250 MB for PaperPort
- 1024x768 pixel color monitor with 16-bit color or greater video card
- CD-ROM drive for installation
- A sound card and speaker for reading text aloud
- To save DOCX, XLSX and PPTX files (Microsoft Office 2007 Word, Excel and PowerPoint file formats) or to load and save XPS files (XML Paper Specification files), you should install Microsoft .NET Framework 3.0 if you are not already running Windows Vista or have Office 2007 installed.

PDF Converter Professional 5 Enterprise:

- Intel® Pentium® or higher processor or equivalent.
- Microsoft® Windows® : Windows 2000 (SP 4), Windows XP (SP 2), Windows XP 64-bit Edition, Windows Vista 32-bit or 64-bit Editions, Windows 2003 Server.
- Microsoft Internet Explorer 5.5 or above.
- 256MB RAM (512 MB recommended).
- 200MB of free hard disk space for application files plus 50MB working space during installation.
- SVGA monitor with 256 colors, but preferably 16-bit color (called High Color in Windows 2000 and Medium Color in XP) and 800 x 600 pixel resolution.
- Windows-compatible pointing device.
- CD-ROM drive for installation.
- If Windows Vista is not installed; Microsoft .NET Framework 3.0 is required in order to save to DOCX, XLSX, and PPTX file formats (Microsoft Office 2007 formats) The Microsoft .NET Framework 3.0 can be installed on Windows XP but cannot be installed on Windows 2000.
- Sound card is optionally required for using the functionality of the supplied Text-To-Speech Engine.
- Microsoft® Office 2007 (SP 1) is required to leverage the complete functionality included for XPS files.

Note: Performance and speed will be enhanced if your computer's processor, memory and available disk space exceed minimum requirements. This is especially true when converting very large color PDF files. Hyper-thread enabled or multi-processor systems can deliver better performance.

Preparing to install

If a previous version of Scan to PC Desktop is installed:

- During the installation of Scan to PC Desktop Professional 10 the following software will automatically be uninstalled as part of the installation process: Scan to PC Desktop v6, v7, v8, v9, and v9.1 components (PaperPort, OmniPage, PDF Converter, PDF Create, and Image Retriever).
- If a reboot is required during a component uninstall, the Scan to PC Desktop 10 installer will manage the reboot.
- The installation of Scan to PC Desktop Professional 10 will continue after reboot.

Please note:

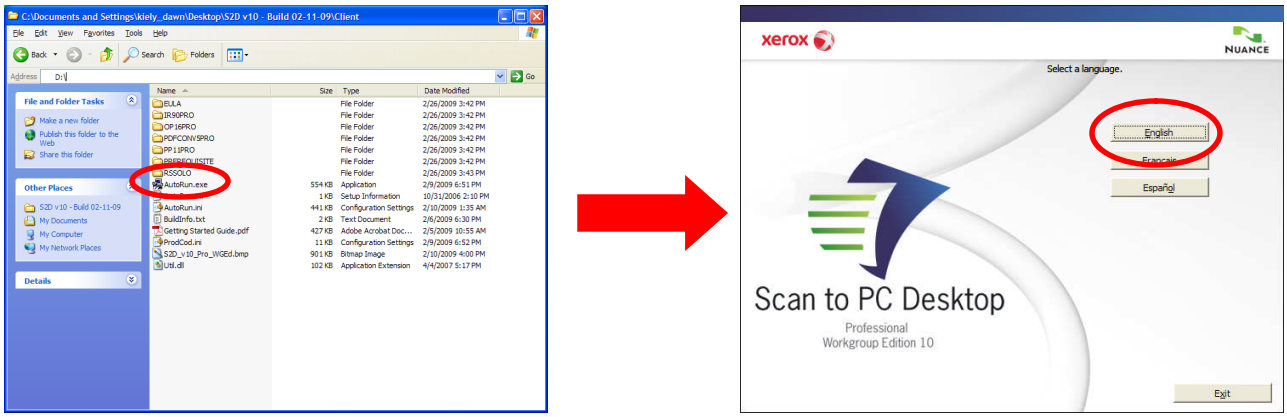
- The above process will only be implemented for Scan to PC Desktop v6, v7, v8, v9, and v9.1 known components (PaperPort, OmniPage, PDF Converter, PDF Create!, and Image Retriever).

- Any other PaperPort, OmniPage, PDF Converter, or PDF Create! component installed as retail products or non Xerox OEM products must be uninstalled manually through Add/Remove Programs. In these situations, the Scan to PC Desktop 10 installer will notify the user to uninstall components and reinstall Scan to PC Desktop 10.

Begin the installation

On most PCs, simply inserting the installation CD-ROM into the CD-ROM drive launches the Scan to PC Desktop installer. However, if the installer does not automatically run on your PC after you insert the CD-ROM, please follow these steps:

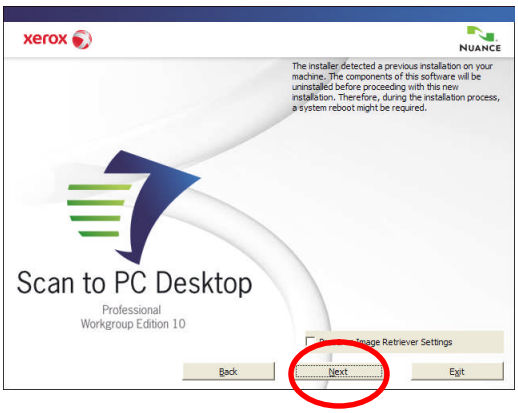
1. Use Windows Explorer to browse the CD-ROM.
2. Double-click on the **autorun.exe** program on the CD-ROM.
3. Either way, the language chooser screen is the first screen displayed by the installer.
4. The installation CD-ROM contains multiple localized versions of the associated software. To begin, select the language appropriate for your installation.



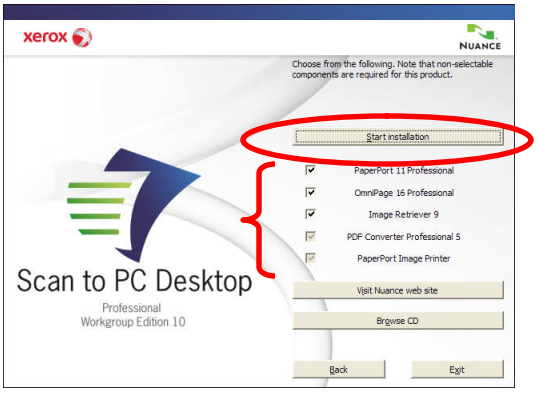
Installing over a previous version

Note: If you are not installing over a previous version of Scan to PC Desktop, proceed to Page 7 of this Guide.

If you are installing over Scan to PC Desktop v6, v7, v8, v9, or v9.1, the installer will detect that you have a previous version of Scan to PC Desktop installed. Click on "Next".



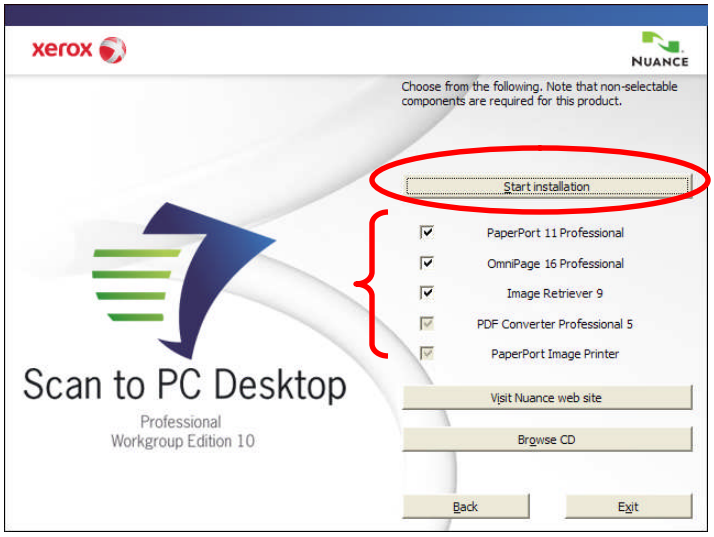
Specify which components you want to install. Click the checkboxes **ON** for each item to be installed. To gain the full functionality of Scan to PC Desktop, leave all item checkboxes **ON** (the default). Note that if PaperPort or OmniPage are selected installed, PDF Converter Professional will be installed. You can select to start the installation , browse the CD, or visit Nuance's Web Site. Choose **Start Installation**.



Proceed to Page 8 to continue the installation.

New installation

Note: If you are installing over a previous version of Scan to PC Desktop, proceed to Page 6 of this Guide.



Specify which components you want to install. Click the checkboxes **ON** for each item to be installed. To gain the full functionality of Scan to PC Desktop, leave all item checkboxes **ON** (the default). Note that if PaperPort or OmniPage are selected installed, PDF Converter Professional will be installed.

Click on “Start installation”.

Proceed to Page 8 to continue the installation.

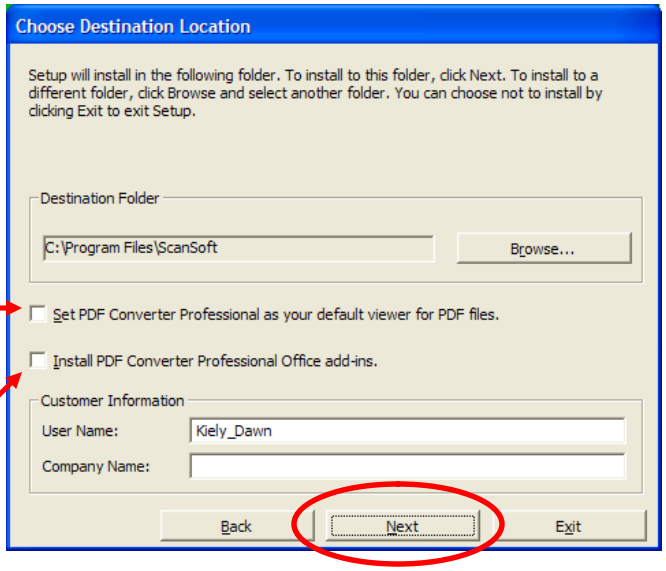
Installation

Chose Destination Location and PDF Settings

You will be asked where you want Scan to PC Desktop 10 to be installed. You will be asked to select your preferred PDF settings.

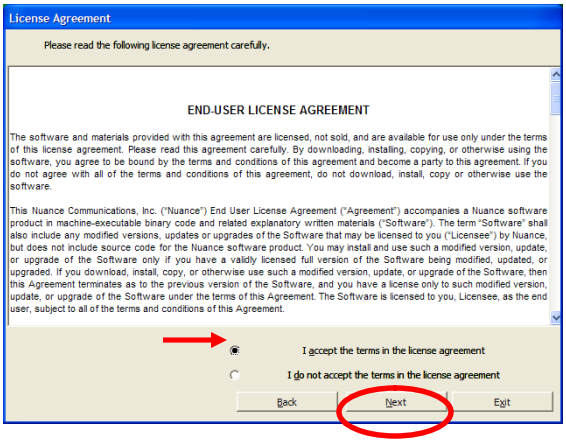
You can select whether or not you want PDF Converter Professional to be your default PDF viewer. If you currently have Adobe Reader installed and you would prefer to have Adobe Reader be your default PDF viewer, leave this box unchecked.

If you would prefer to not have PDF shortcut buttons add into your Microsoft Office applications, leave this box unchecked.



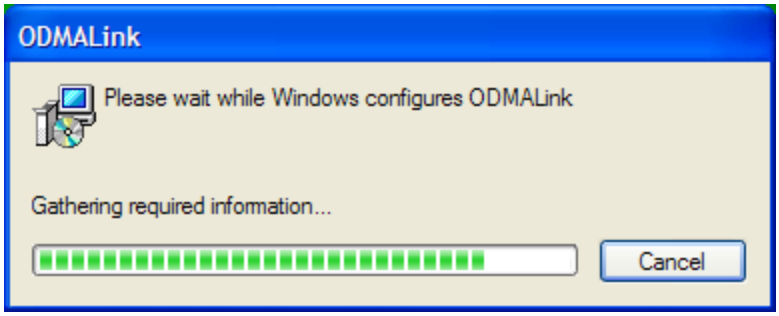
Accept license agreement

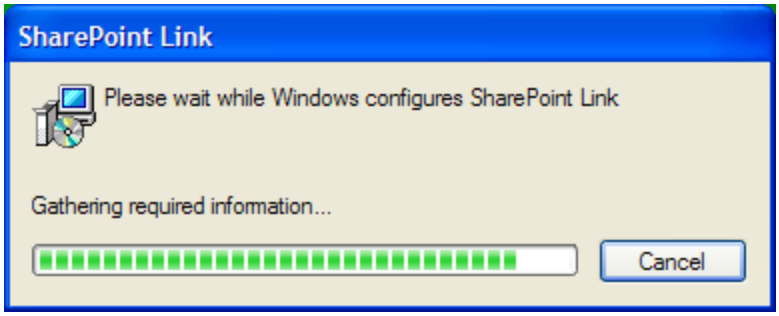
You must click **I accept** to accept the License Agreement and proceed with the installation. Click on **Next**.

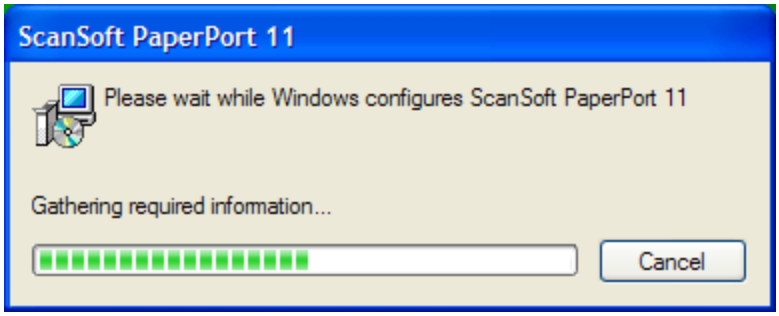


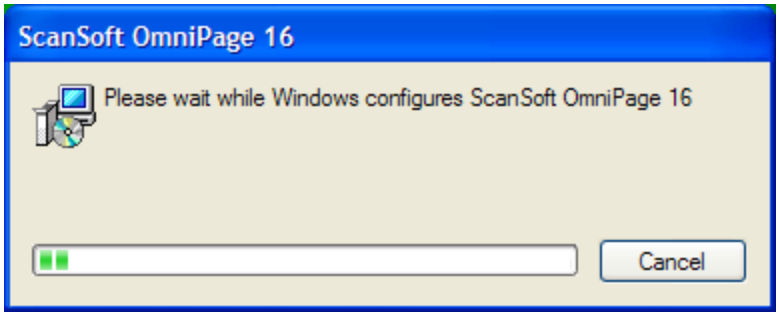
Installation Begins

The installer will automatically install each component of Scan to PC Desktop including the ODMA link, SharePoint link, ScanSoft PaperPort 11, ScanSoft OmniPage 16, Image Retriever 9, Nuance PDF Professional 5, and PaperPort Image Printer.









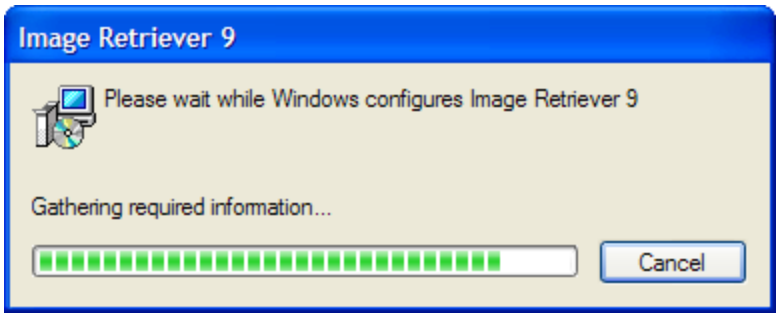
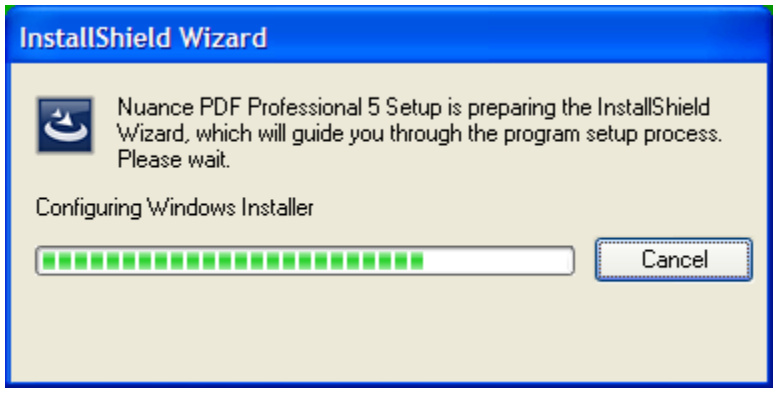
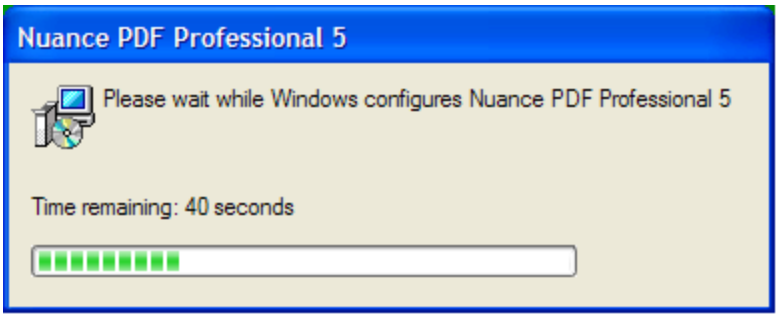
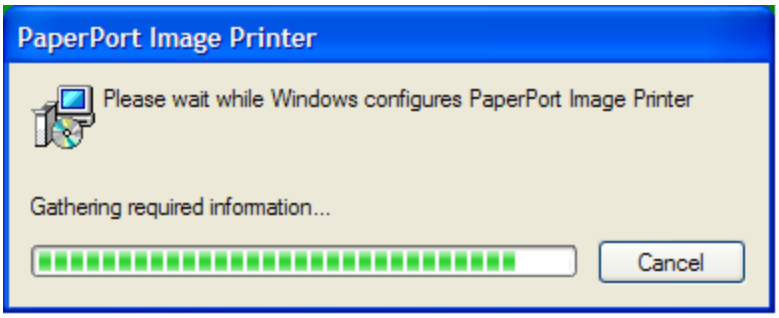


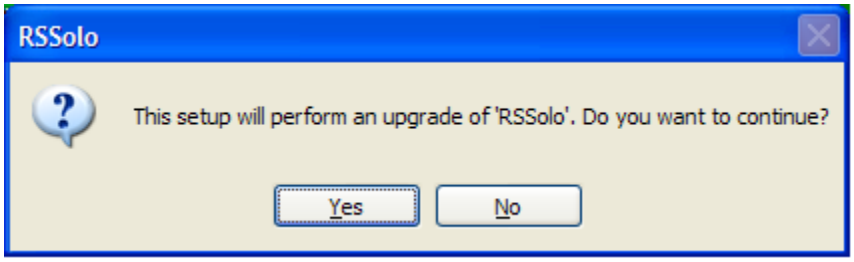
Image Retriever 9
Please wait while Windows configures Image Retriever 9
Gathering required information...
Cancel

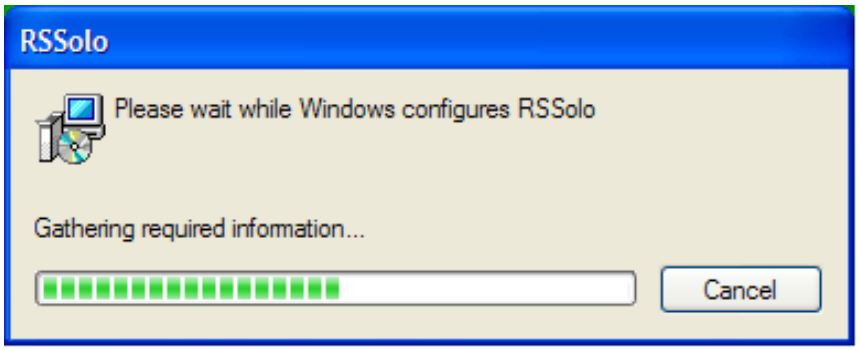

InstallShield Wizard
Nuance PDF Professional 5 Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
Configuring Windows Installer
Cancel

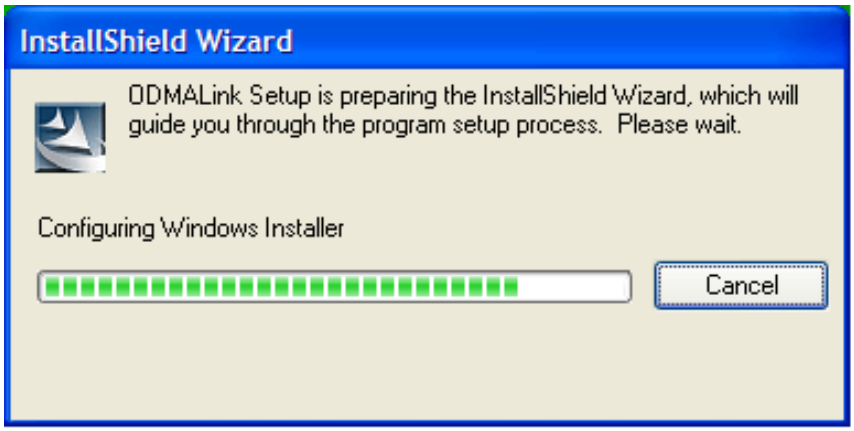

Nuance PDF Professional 5
Please wait while Windows configures Nuance PDF Professional 5
Time remaining: 40 seconds

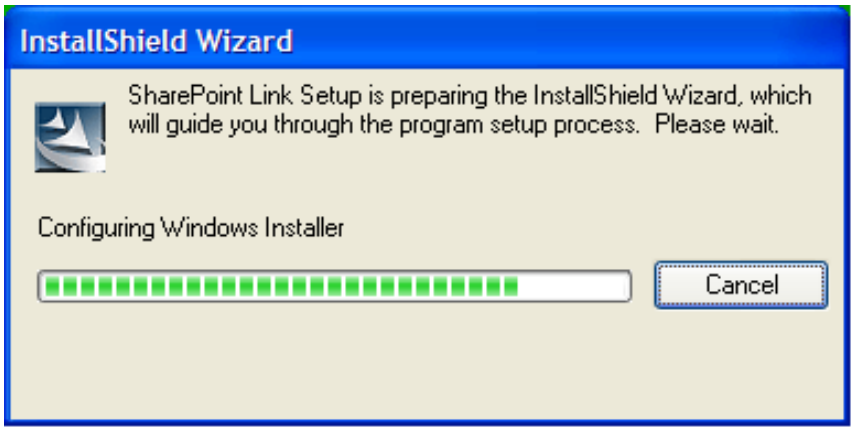

PaperPort Image Printer
Please wait while Windows configures PaperPort Image Printer
Gathering required information...
Cancel

You may be prompted if you want to install or upgrade RSSolo. If so, click on “Yes”.

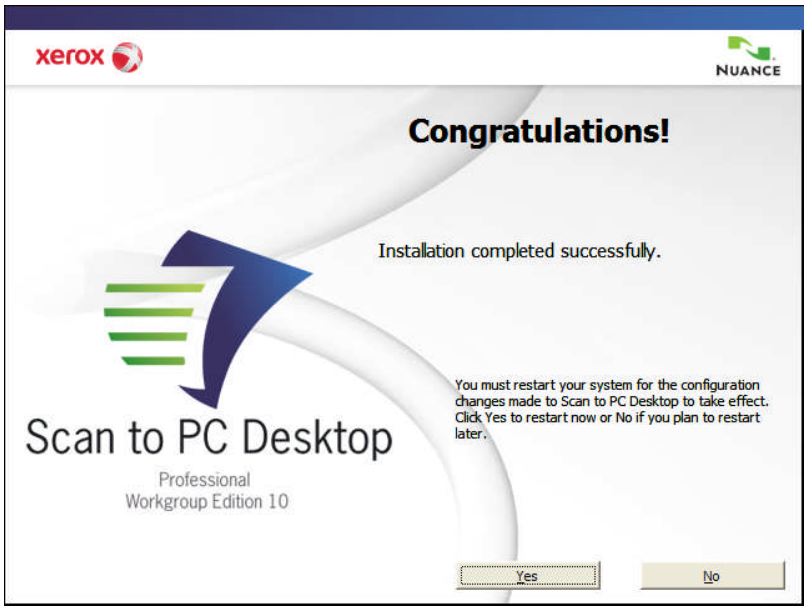








ScanSoft PaperPort 11.2 - Product Registration
Register Today!
Notification from Technical Support
Savings on product upgrades
Early notification of new products
Privacy assured
Register online with simple, secure registration through the Internet, or mail or fax a printed registration form.
NUANCE
Register online
Print registration form
Remind me in 7 days
OK


xerox
NUANCE
Congratulations!
Installation completed successfully.
Scan to PC Desktop
Professional
Workgroup Edition 10
You must restart your system for the configuration changes made to Scan to PC Desktop to take effect. Click Yes to restart now or No if you plan to restart later.
Yes
No

Register and reboot

When the specified components are installed, complete the electronic registration by following the screen instructions. Select **OK**.

Another dialog box appears asking if you want to restart your computer.

You must restart your computer before you can successfully use the Scan to PC Desktop components. Click **Yes.**

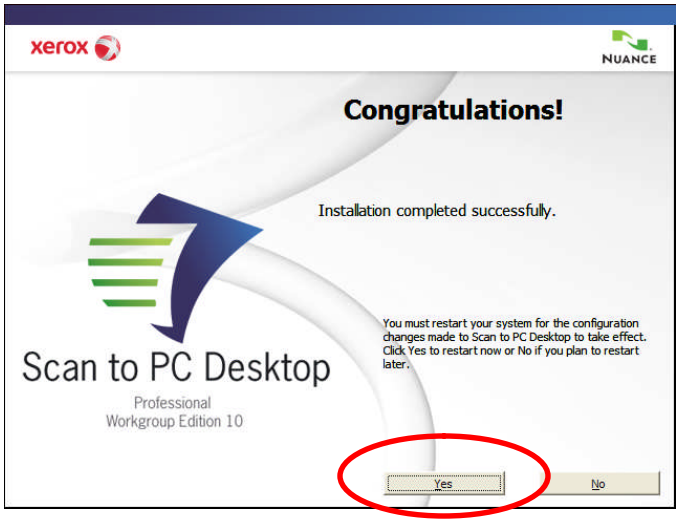
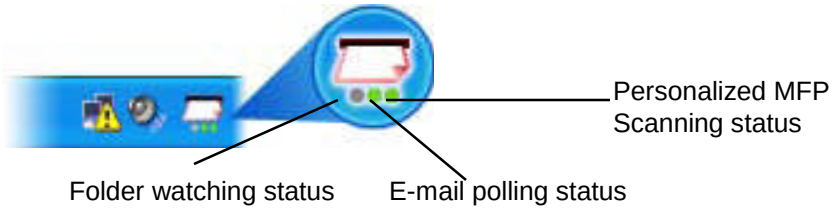


Image Retriever setup

After your computer restarts, open the **Image Retriever Settings** dialog box by double clicking on the Image Retriever icon the in the Systray in the lower right corner of your Windows Desktop.



Depending on which program edition you use, the icon may have one or three light indicators in the bottom. They represent the status of e-mail polling, folder watching and Personalized MFP Scanning by means of different colors. Since e-mail polling and Personalized MFP Scanning are only available in the Professional Edition of Image Retriever, the corresponding (right) LEDs will not be displayed in the Special Edition of the program.

Please note that the “Image Retriever Settings“ dialog may automatically display on the startup of Image Retriever until you configure the program.

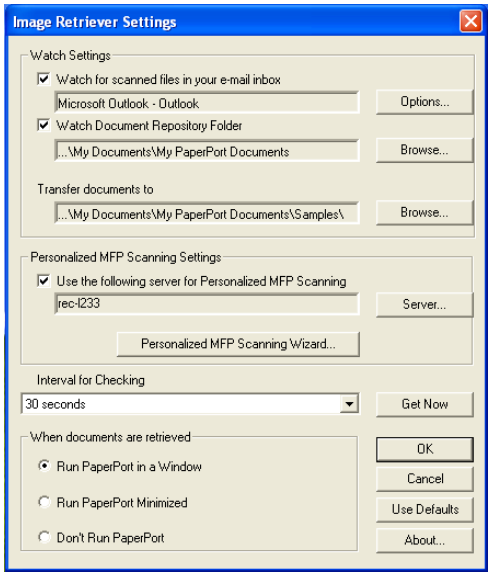
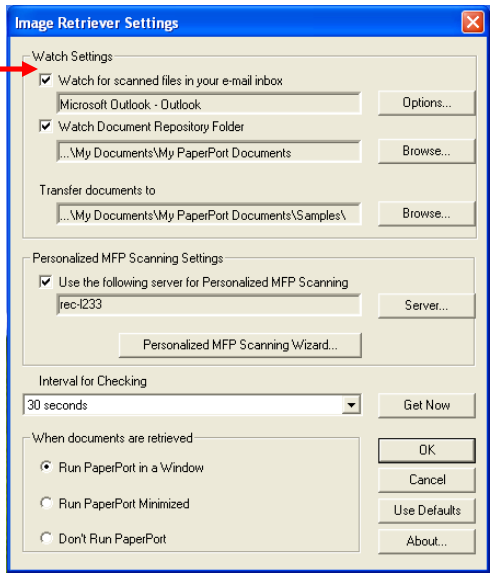


Image Retriever setup – Email polling

This feature of Image Retriever lets you monitor your Microsoft Outlook or Lotus Notes inbox for new messages with attached PDF, TIFF, or XPS files generated by a Xerox device. Disable the feature if you do not want to monitor your e-mail. Use the following controls to configure e-mail polling of Image Retriever.



Click **Watch for scanned files in your e-mail inbox** checkbox to enable e-mail polling.

Click the **Options** button to change your current e-mail polling configuration. If you have both Microsoft Outlook and Lotus Notes installed on your system, the following dialog box will display enabling you to make your selection between the two mail clients. Click **OK** to confirm your choice.

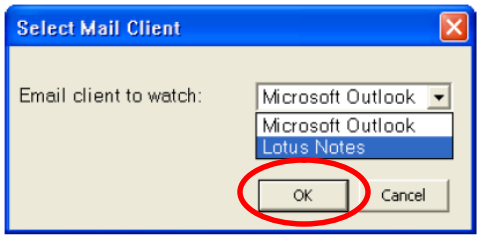


Image Retriever Professional supports the following email applications:

- Outlook 98
- Outlook 2000
- Outlook 2002
- Outlook 2003
- Outlook 2007
- Lotus Notes 5.x
- Lotus Notes 6.x
- Lotus Notes 7.x

Image Retriever setup – Email polling – Microsoft Outlook

In the case of Microsoft Outlook the “Choose Profile” dialog box displays enabling you to choose the Microsoft Outlook profile whose inbox you want Image Retriever to monitor. Select your Microsoft Outlook profile and click **OK**. In the “Image Retriever Settings” dialog, you will see your Microsoft Outlook profile name displayed in the relevant field.

Microsoft Collaboration Data Objects

Microsoft Outlook users cannot enable e-mail monitoring or choose a Microsoft Outlook profile unless Collaboration Data Objects is installed and enabled for Microsoft Outlook. Image Retriever will display an error message if they attempt to do so.

To install Collaboration Data Objects with Microsoft Outlook 2000, 2002 or 2003
- choose custom installation
- then detailed installation options for each application
- finally select and enable the installation of the Collaboration Data Objects.

Microsoft Outlook 98 users should pick the Full Installation option.

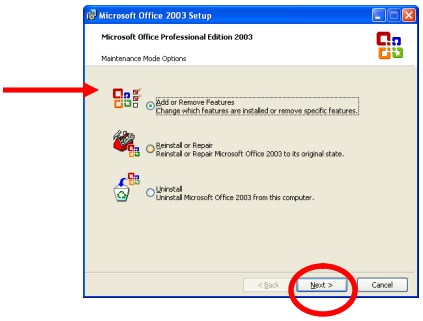
Microsoft Outlook 2007 users should download and install Collaboration Data Objects from Microsoft's Download Center.

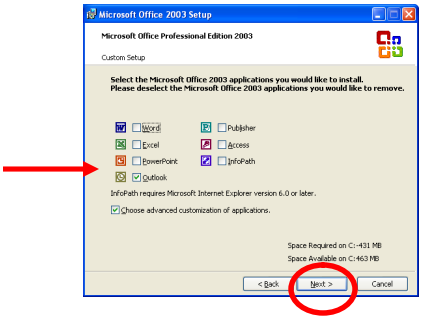
For more information about Collaboration Data Objects please see your Microsoft Outlook documentation.

Microsoft Outlook users cannot enable e-mail monitoring or choose a Microsoft Outlook profile unless Collaboration Data Objects (CDO) is installed and enabled for Microsoft Outlook.
Image Retriever supports email polling with the following Microsoft Outlook versions:
- Outlook 98
- Outlook 2000
- Outlook 2002
- Outlook 2003
- Outlook 2007

To install Microsoft Collaboration Data Objects after Microsoft Outlook has been installed, please follow these steps:

1. Go to **Start > Control Panel > Add/Remove Programs**.
2. Click on **Microsoft Office** and click on the **Change** button.
3. Select **Add or Remove Features** and click on **Next**.
4. Check the option for **Outlook**.
5. Check the option for **Choose advanced customization of applications** and click on **Next.**
6. Click on **Collaboration Data Objects** and select **Update**.





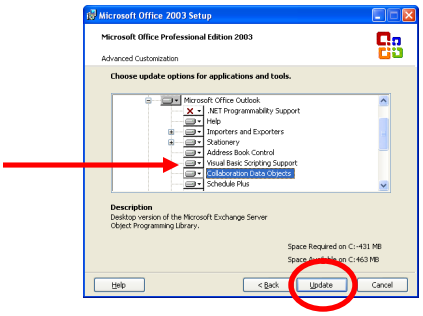


Image Retriever setup – Email polling – Lotus Notes

If you set Lotus Notes as the mail client for Image Retriever to watch, you have to specify your password. If you leave the checkbox *“Save password“* empty you will have to give it again every time Image Retriever starts. If you click the checkbox, your password will be stored in an encrypted format and will not be prompted for again.

Please note that if Lotus Notes is installed, but is not configured properly, or not set for any users, e-mail polling will not work, and Image Retriever will display an error message (during configuring the program) or the left-hand side light indicator in the program icon will turn red (during monitoring).

Image Retriever setup – Supported devices

E-mail Polling Supported Xerox Devices

Image Retriever can poll for e-mail attachments generated by the Xerox devices listed below.

Document Centre 490/480/470/460 ST
Document Centre 440/432/425/420 ST
Document Centre 426/430
Document Centre 555/545/535
WorkCentre Pro 55/45/35
WorkCentre M55/M45/M35
WorkCentre Pro 90/75/65
WorkCentre Pro 40 Color/32 Color
WorkCentre Pro 165/175
WorkCentre M165/M175
WorkCentre Pro C2128/C2636/C3545
WorkCentre C2128/C2636/C3545
WorkCentre Pro 232/238/245/255/265/275
WorkCentre 232/238/245/255/265/275
WorkCentre C7132
WorkCentre 7655/7665/7675
WorkCentre 5030/5050
WorkCentre 7328/7335/7345
WorkCentre 4150
WorkCentre 7328/7335/7346
WorkCentre 123/128/133
WorkCentre 5222/5225/5230
WorkCentre 7232/42
Phaser 3200 MFP
Phaser 8560 MFP/X
Phaser 6110 MFP
WorkCentre 5632/5638/5645/5655/5665/5675/5687
Phaser 3300 MFP
Phaser 3635 MFP
Phaser 6180 MFP
WorkCentre 4260
WorkCentre M20i
For list updates, see: http://www.xerox.com/scan2pc

NOTE: Scan to Email with JPEG attachments will not be polled by the Image Retriever e-mail feature.

Notes on Using Image Retriever with a Xerox Phaser 8560 MFP Device

To ensure proper functioning between Image Retriever and this device, follow the steps below:

First, install your device driver.

Launch the Xerox Scan Utility application.

Use this to create one or more user templates. Each will contain a folder that you can set as the watched one for Image Retriever.

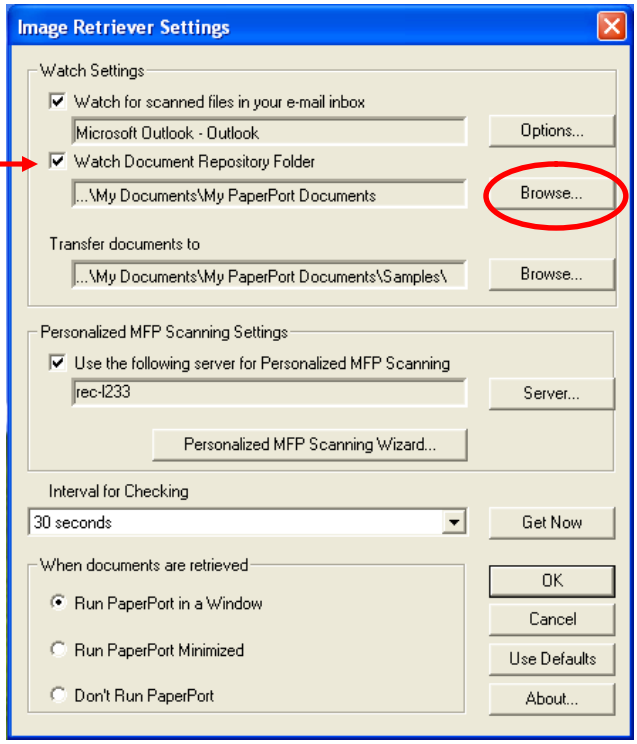
Then install Image Retriever.

Finally, set the Image Retriever watch folder to the one specified by the user template you wish to use.

Image Retriever can watch only one user template-specified folder at a time. To change this, select a folder specified by another user template.

Image Retriever setup – Folder polling

Enable this setting to monitor a specified folder on a networked file server or local drive for incoming scanned images generated by a Xerox device.



Click this checkbox in the *"Image Retriever Settings"* dialog to enable Image Retriever to monitor the folder of your choice.

Click the **Browse...** button to display the *"Browse for Folder"* dialog box. This dialog box lets you locate and select the folder you want Image Retriever to monitor:

After you identify the directory to be monitored and click **OK**, the *"Browse for Folder"* dialog box closes. Image Retriever can periodically monitor this folder to see if any scanned images are placed there by the Xerox system.

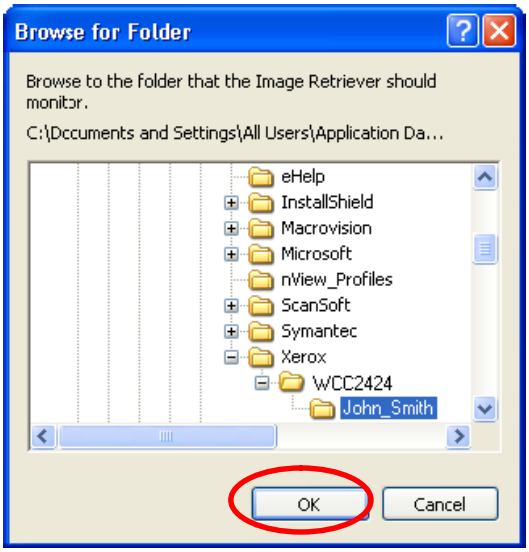
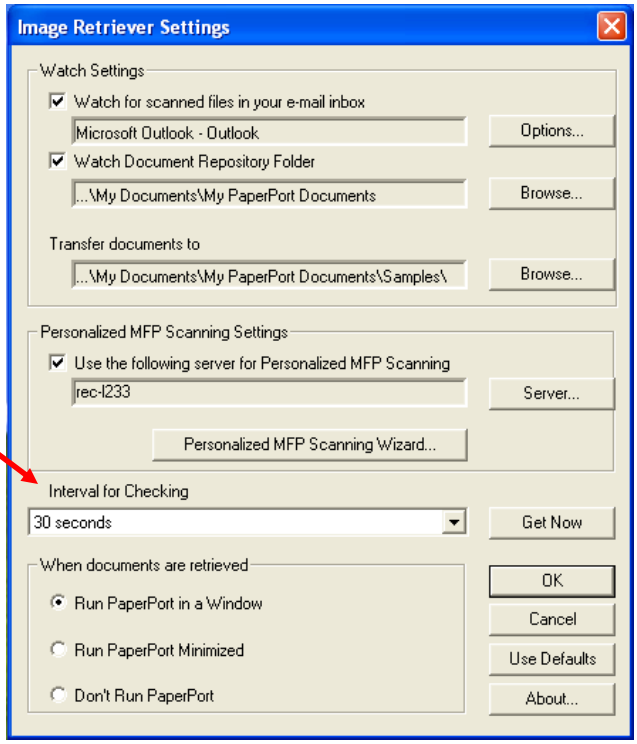


Image Retriever setup – Folder polling

To set how often the watched folder or monitored inbox will be checked, select a setting from the *"Interval for checking"* list box. The following choices are available from the list box:

1, 2, 5, 10, or 30 seconds
1, 2, 3, 5, 10, 30, or 60 minutes

In addition to the above values, you could also select Never. In this case Image Retriever will continue running but watching is suspended. One option is to select **Never** for the interval and only press the **Get Now** button when you know that there are scanned images to be retrieved from your network folder. For additional info, see the **Image Retriever setup – Get Now button** section of this document.



One suggestion is to set the watch interval at about half the time it takes you to walk from the device's location in your company to your office. If it takes you 60 seconds to walk this distance, set the interval to 30 seconds. This way the document that you scanned can be ready and waiting for you on your PaperPort desktop!

Image Retriever setup – Get Now button

Click the **Get Now** button if you wish to scan the folder or inbox of your choice immediately. Image Retriever does the monitoring on whichever component is checked. That is, if *"Watch Document Repository Folder"* is checked, Image Retriever will immediately scan the selected folder; whereas if *"Watch for scanned files in your e-mail inbox"* is checked, your Microsoft Outlook or Lotus Notes inbox will be polled for new PDF, TIFF, or XPS e-mail attachments generated by a Xerox device.

In either case, the relevant signal of the Image Retriever icon on the system tray will change to *"Processing"* state (light green).

Image Retriever will place the new items appearing in the watched folder or inbox on the PaperPort desktop and will launch the PaperPort application - unless you have specified *"Don't run PaperPort"* in the *"Image Retriever Settings"* dialog.

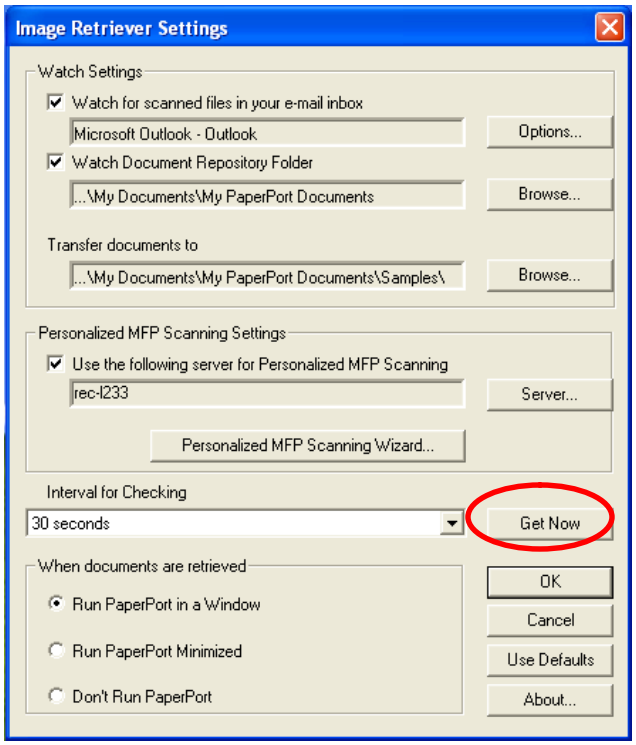
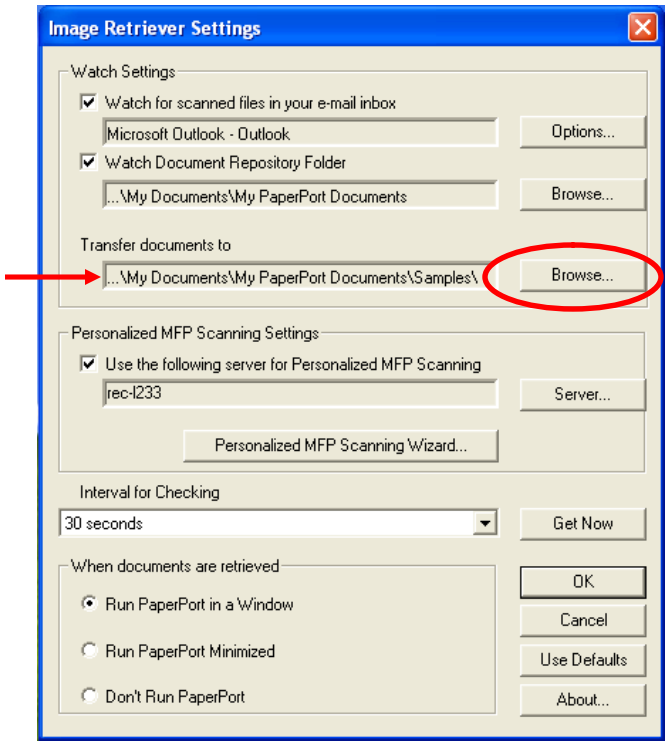


Image Retriever setup – Transfer documents setting

To specify where Image Retriever is to place the retrieved files, click **Browse** and choose a PaperPort folder.



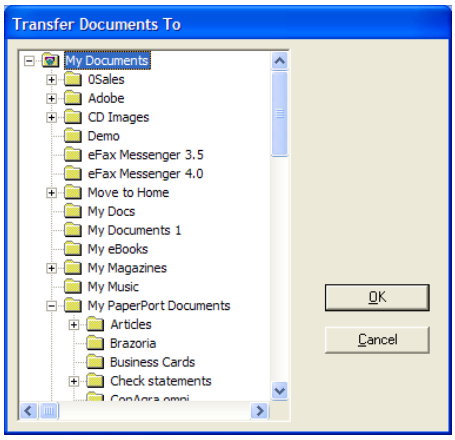
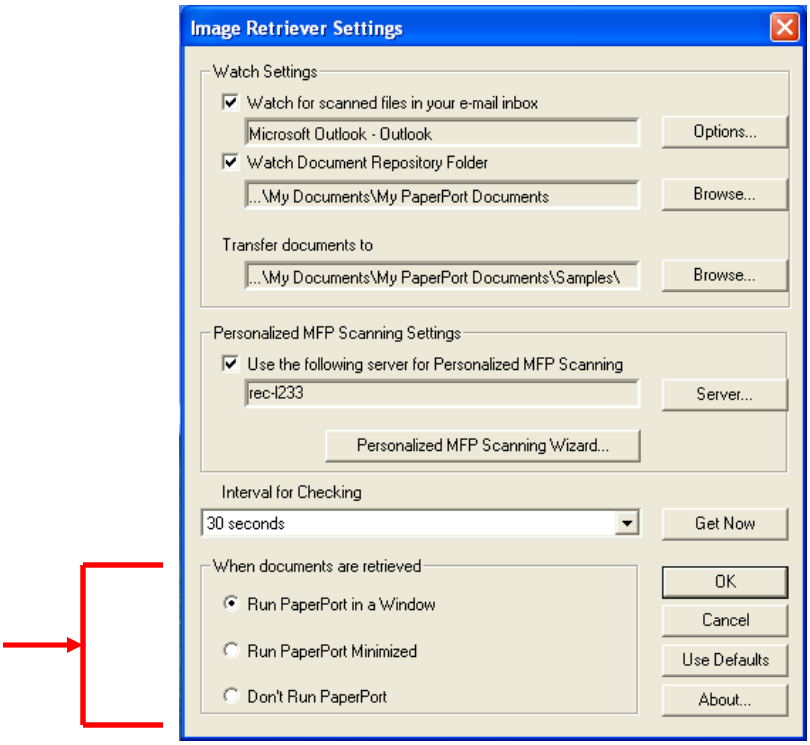


Image Retriever setup – When documents are retrieved setting

Specify the behavior you prefer for document retrieval. The **When documents are retrieved** setting offers three choices :

- Run PaperPort in a window
- Run PaperPort minimized
- Don't run PaperPort

Click **OK** in the **Image Retriever Settings** dialog box to confirm Image Retriever settings.



Personalized MFP Scanning

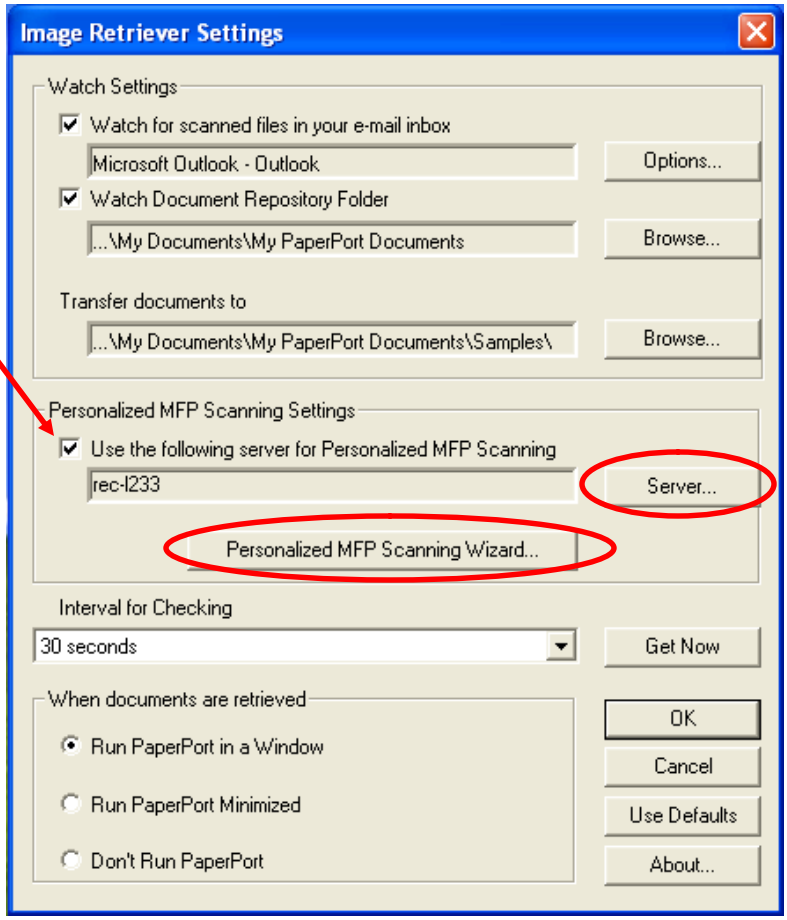
Personalized MFP Scanning is the ability to change the control panel on supported Multifunction Printers/Copiers so that it becomes customized with your own destination folders and scanning preferences. Image Retriever displays PaperPort folders and scanning profiles as well as the document conversion workflows of OmniPage stored on your local computer and allows you to "push" these settings to the control panel of the Multifunction Printer/Copier through the PaperPort PSP Server. When you identify yourself to the MFP through a log-in screen it will automatically change the control panel to reflect your personal folder destinations and scanning preferences. The PaperPort PSP Server requires Image Retriever on your local machine and the ability to control the MFP through a specially designed software interface. On select Xerox machines this ability is referred to as the Xerox Extensible Interface Platform (EIP) Advanced Development Software for Xerox Multifunction Printers. The following devices currently support the Xerox Extensible Interface Platform (EIP) and PaperPort PSP Personalized MFP Scanning:

WorkCentre™ 56xx
WorkCentre™ 76xx
WorkCentre™ Pro 2xx
WorkCentre™ 73xx
WorkCentre™ 52xx
WorkCentre™ 72xx
WorkCentre™ 74xx

Personalized MFP Scanning

Use the following server for Personalized MFP Scanning

Turn on this option to enable the Personalized MFP Scanning functionality.



Server Button

Click the **Server** button to change the PaperPort PSP Server used for the Personalized MFP Scanning functionality.

For information on available servers contact your system administrator.

Personalized MFP Scanning Wizard Button

Detailed information about using the Personalized Scanning Wizard is located in the Scan to PC Desktop 10 Customer Orientation Guide available at http://www.nuance.com/scan2pc