P2WW-4570-01ENZ0

PaperStream Capture 4.0

Getting Started

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Introduction

Thank you for using PaperStream Capture or PaperStream Capture Pro.

- **About This Product**

  PaperStream Capture and PaperStream Capture Pro are applications used to scan documents using a scanner from our image scanner series.
  This manual explains how to use PaperStream Capture for scanning with our image scanner series to new users of PaperStream Capture.

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Conventions

- **Symbols Used in This Manual**

  The following symbols may be used in titles in this manual.

  -

    This indicates an explanation for the easy setup.

  -

    This indicates an explanation for the advanced setup.

- **Abbreviations Used in This Manual**

  The following abbreviations are used in this manual:

Abbreviations Used	Name
Windows 10	Windows® 10 Home (32-bit/64-bit) Windows® 10 Pro (32-bit/64-bit) Windows® 10 Enterprise (32-bit/64-bit) Windows® 10 Education (32-bit/64-bit)
Windows Server 2016	Windows Server® 2016 Standard (64-bit)
Windows Server 2019	Windows Server® 2019 Standard (64-bit)
Windows Server 2022	Windows Server® 2022 Standard (64-bit)
Windows 11	Windows® 11 Home (64-bit) Windows® 11 Pro (64-bit) Windows® 11 Enterprise (64-bit) Windows® 11 Education (64-bit)
Windows	Windows 10, Windows Server 2016, Windows Server 2019, Windows Server 2022, or Windows 11
Word	Microsoft® Word
Excel	Microsoft® Excel®
PowerPoint	Microsoft® PowerPoint®
SharePoint	Microsoft® SharePoint® Server 2016 Microsoft® SharePoint® Server 2019
SharePoint Online	Microsoft® SharePoint® Online
.NET Framework	Microsoft® .NET Framework

- **Names Used for Buttons on a Scanner in This Manual**

  The following names are used for buttons on a scanner in this manual.

Abbreviations Used	Name
Scan button on a scanner	This is a general term for a button on a scanner which has the word "Scan" in the button name such as the [Scan/Enter] button or [Scan/Stop] button. The name for the scan button on a scanner varies depending on the scanner model. For details, refer to the Operator's Guide of the scanner.

- **How to Start PaperStream Capture**

  PaperStream Capture can be started in the following ways:

  - Starting it from the [Start] menu
  - Starting it from the desktop shortcut ( )

  When PaperStream Capture is installed, its desktop shortcut is created by default. Therefore, this manual provides instructions for starting PaperStream Capture from the desktop shortcut.

- **Arrow Symbols in This Manual**

  Right-arrow symbols (→) are used to separate icons or menu options you should select in succession.

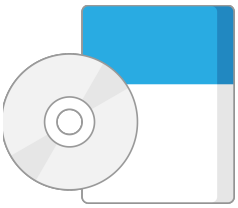
  Example: Select [Start] menu → [Control Panel].

- **Screen Examples in This Manual**

  Microsoft product screenshots are reprinted with permission from Microsoft Corporation.
  The screen examples in this manual are subject to change without notice in the interest of product development.
  The screenshots used in this manual are of Windows 10.
  The actual screen and operations may differ depending on the operating system.
  If the actual screen differs from the screen examples in this manual, operate by following the actual displayed screen.

Overview of PaperStream Capture

PaperStream Capture is an image scanning application bundled with our image scanner series.
This manual explains the procedure from connecting the scanner to scanning documents as follows.



1. Installation

2. Creating Scan Settings

Easy Setup

Recommended for beginners.

Advanced Setup

Recommended for users who want to configure customized settings.

3. Scanning Documents

Installing PaperStream Capture

To install PaperStream Capture, use one of the following methods:

- Installing Software from the Setup DVD-ROM (page 9)
- Downloading the Setup Program and Installing the Software (page 9)

Installing Software from the Setup DVD-ROM

If you have the Setup DVD-ROM, insert it into the DVD drive on your computer and follow the on-screen instructions to install.

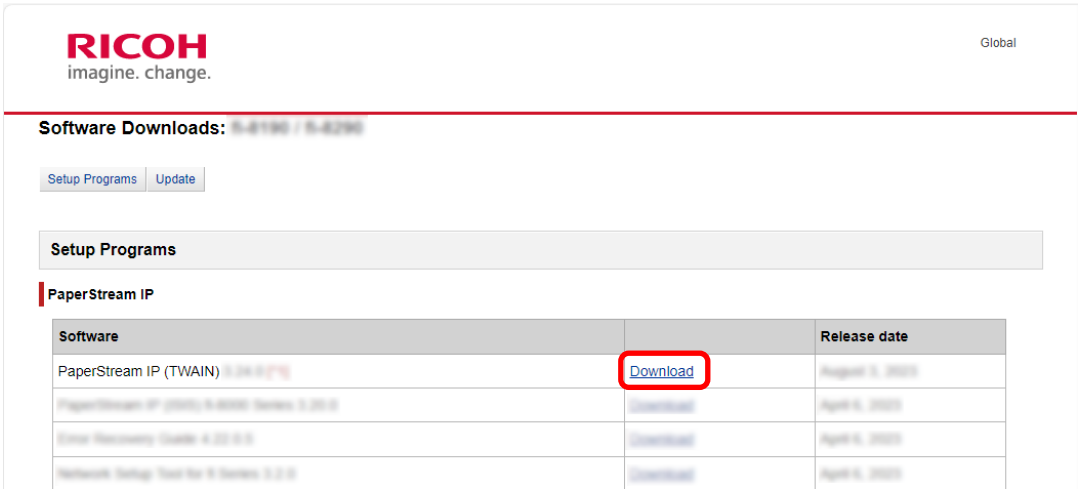
Downloading the Setup Program and Installing the Software

1. **Turn on the computer and log onto Windows as a user with administrator privileges.**
2. **Connect to the fi Series Software Downloads website.**
   https://www.pfu.ricoh.com/global/scanners/fi/dl/

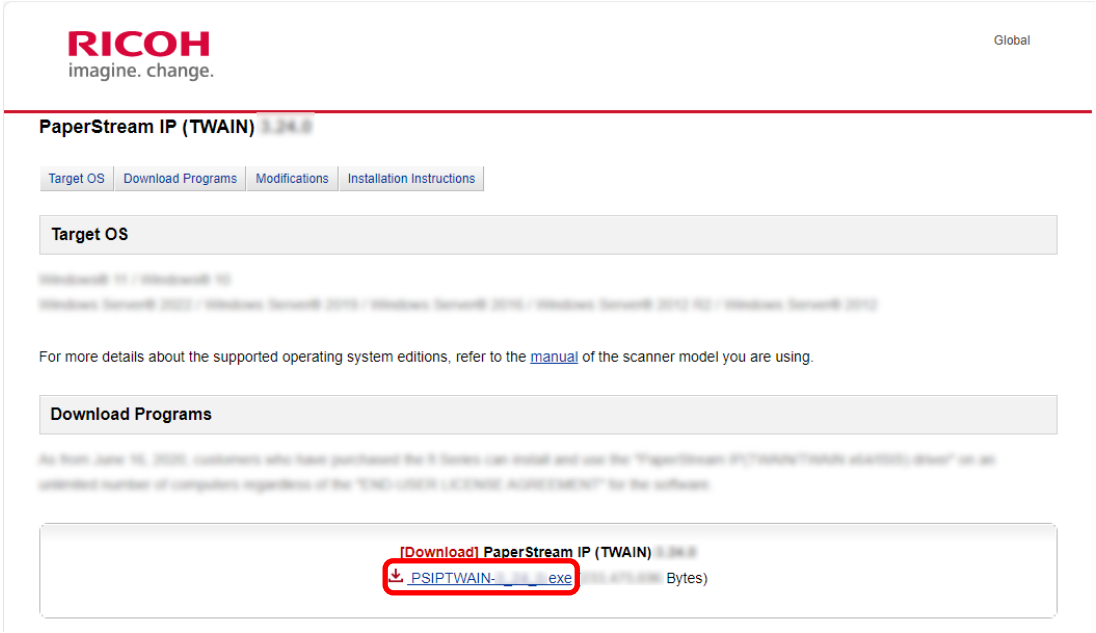
3 **Select your scanner series, product name, and operating system from the pull-down menus, and then click the [Display software list] button.**

4 **Install the PaperStream IP driver.**

a **In the "PaperStream IP" category, click the "Download" link for "PaperStream IP (TWAIN) X.XX.X".**



b Download "PSIPTWAIN-X_XX_X.exe" to your computer.



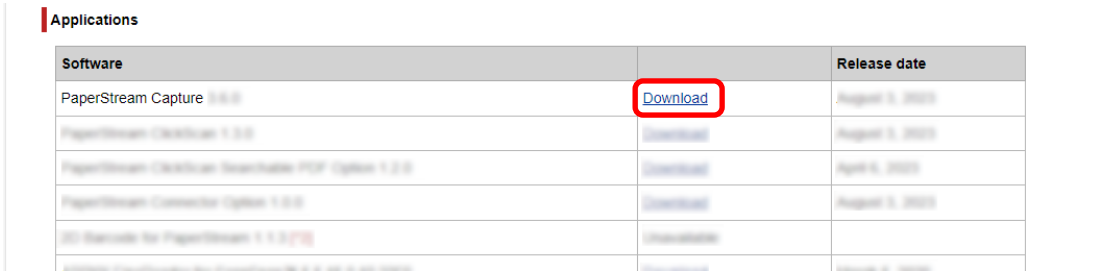
c Double-click "PSIPTWAIN-X_XX_X.exe" to run the installation.

Proceed with the installation by following the on-screen instructions.

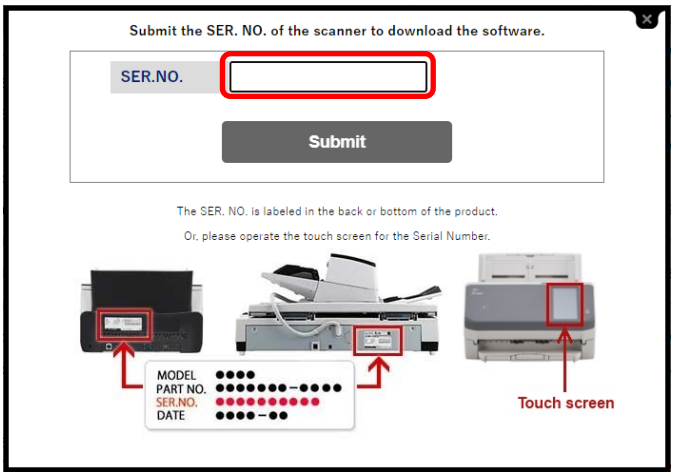
If the message asking you to restart the computer appears, follow the instructions in the message.

5 Install the PaperStream Capture.

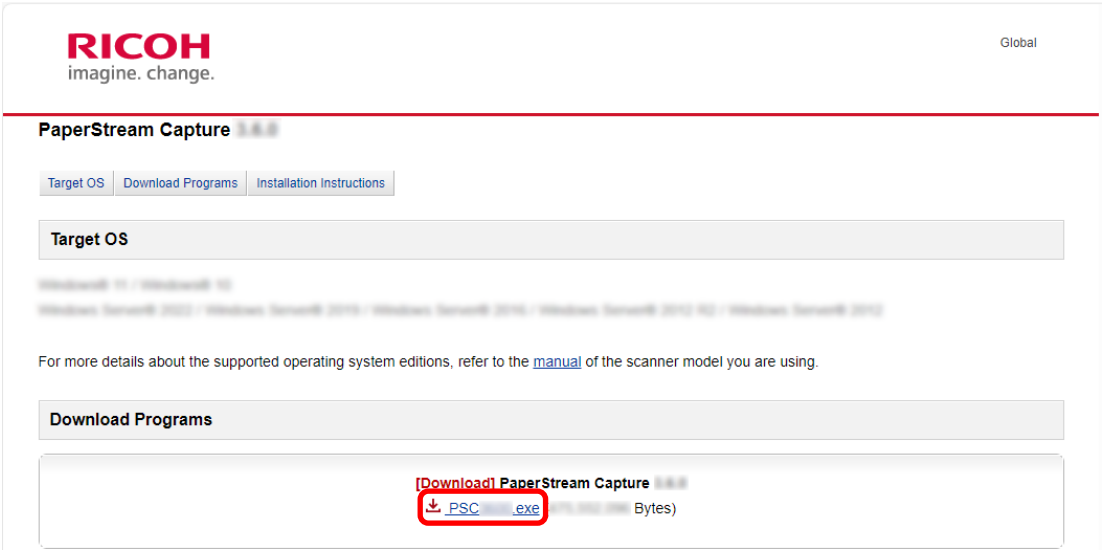
a Find "PaperStream Capture" in the "Applications" category and click the corresponding Download link.



b Enter the serial number and click [Submit].



c Download "PSCXXXX.exe" to your computer.



d Double-click "PSCXXXX.exe" to run the installation.

Proceed with the installation by following the on-screen instructions.

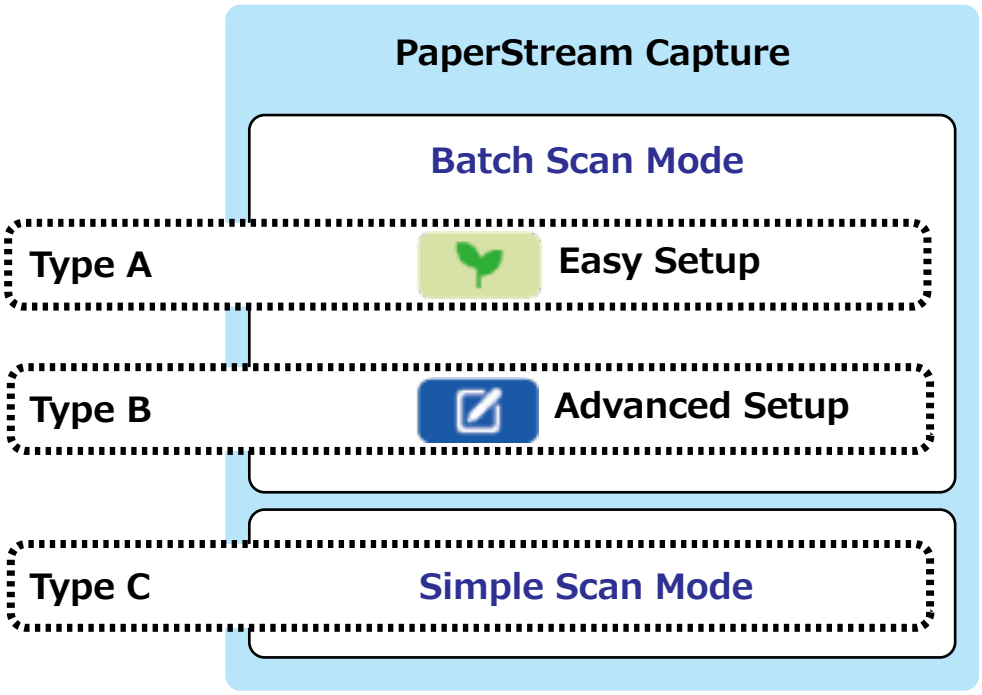
If the message asking you to restart the computer appears, follow the instructions in the message.

Configuring the Scan Settings

Batch Scan mode and Simple Scan mode are the two scanning methods available on PaperStream Capture.

- Batch Scan mode
  Batch Scan mode is a scanning method that is recommended for routine tasks, such as a task with regular scans or a task that is shared in a multi-station operation. You can set a job in advance, and documents are scanned according to the settings.
- Simple Scan mode
  Simple Scan mode is a scanning method that is recommended for irregular tasks, such as a task with irregular scans for which the scan settings are changed for each document. Each time you perform a scan, you can change settings as necessary, such as the save destination, file name, and file format.

- **Recommended Operations by Type**
  - For users who use this application for the first time (Type A)
    Easy Setup in Batch Scan mode is recommended. For details, refer to Easy Setup of the Scan Settings (page 14).
  - For users who want to use this application with the customized settings (Type B)
    Advanced Setup in Batch Scan mode is recommended. For details, refer to Configuring the More Advanced Scan Settings (page 17).
  - For users who want to use this application temporarily with ease (Type C)
    Each time you perform a scan, you can change settings as necessary, such as the save destination, file name, and file format. For details, refer to the PaperStream Capture User's Guide.



Easy Setup of the Scan Settings

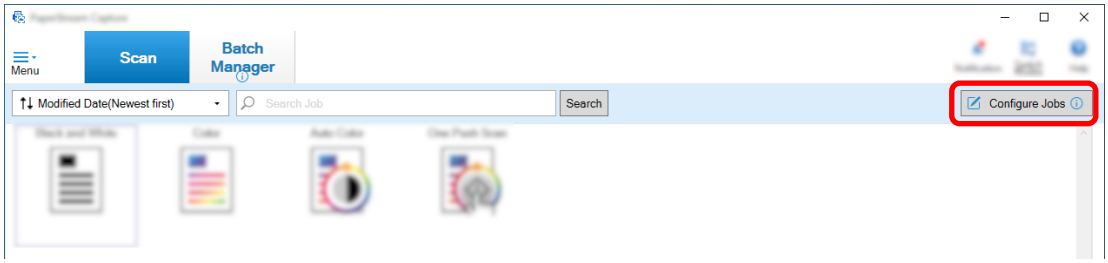
This section describes how to create a job with the easy setup.

In this section, create a job with the following settings:

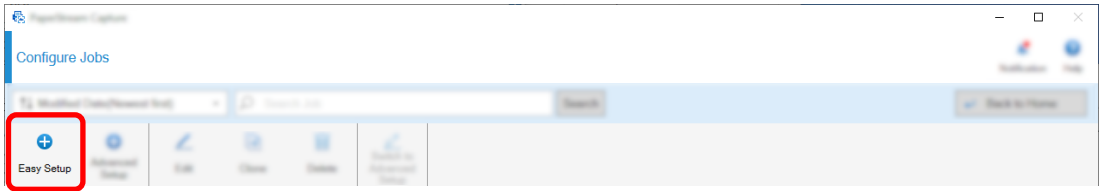
Example of a Job Created "Job 01"

Saving method: Save Documents
Color mode: Color
Resolution: 200 dpi
Paper size: Automatic
File format: PDF
Destination: "C:\Scan\General_Affairs_Dpt" folder

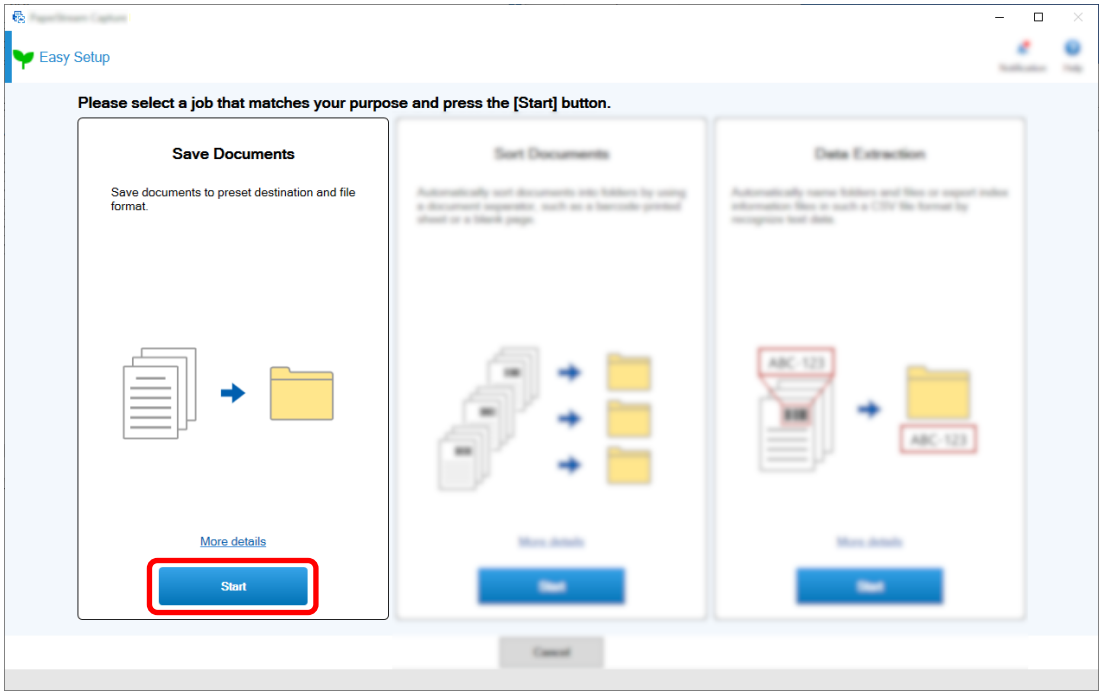
1 On the main PaperStream Capture window, click the [Configure Jobs] button.



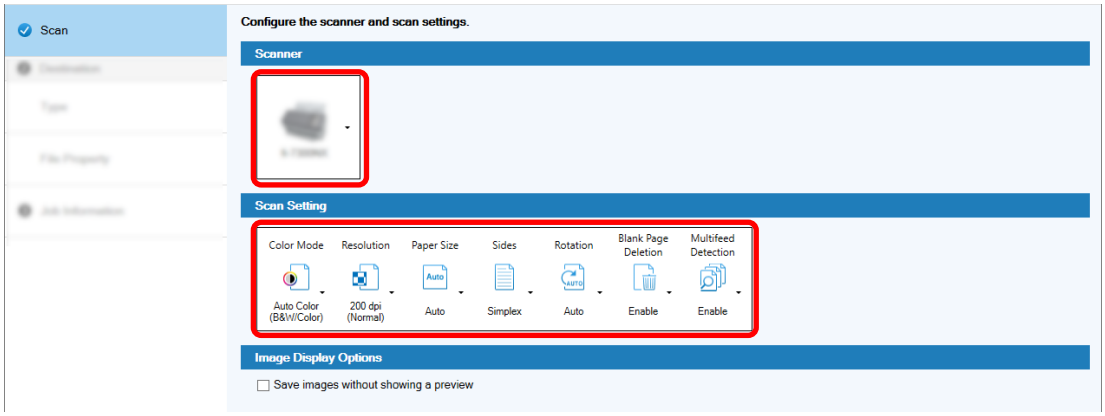
2 Click the [Easy Setup] button.



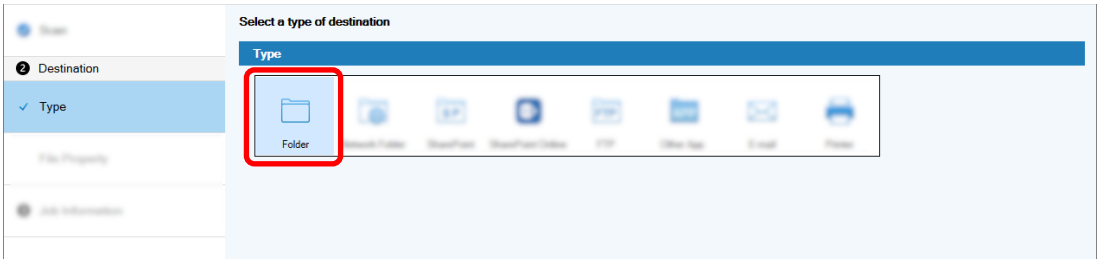
3 **Click the [Start] button in [Save Documents].**



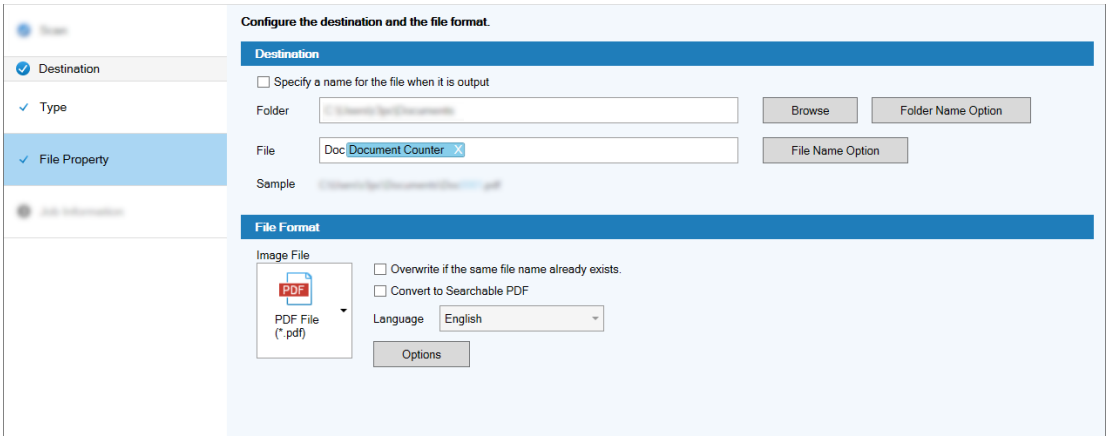
4 **Select a scanner to be used for [Scanner] in the [Scan] tab. Also, specify [Image Mode], [Resolution], and [Paper Size] in [Scan Settings].**



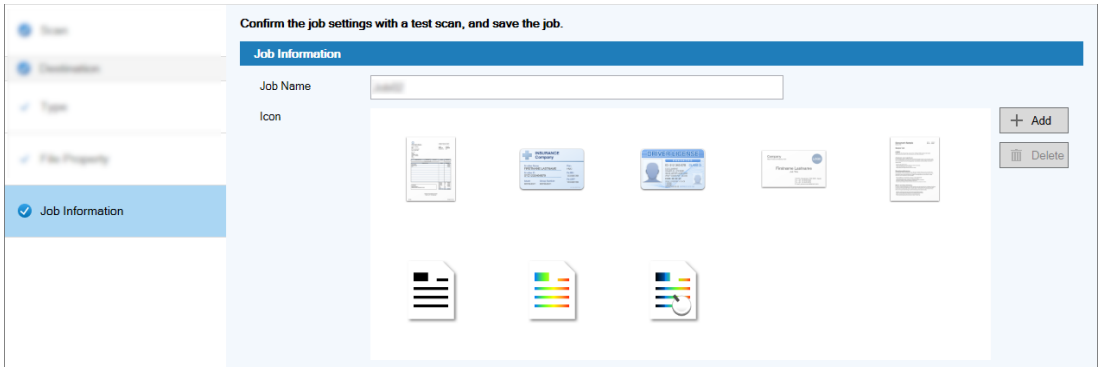
5 **Select [Folder] in [Type] under the [Destination] tab.**



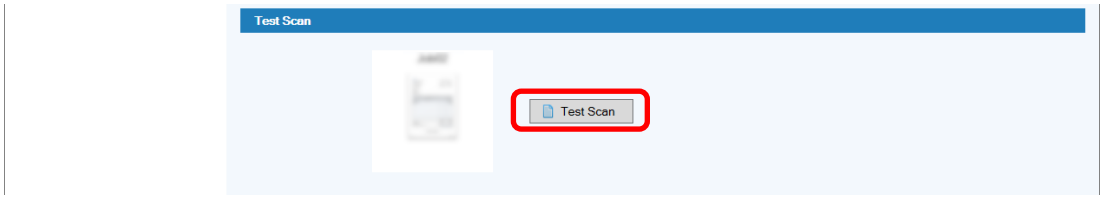
6 Select an output destination and a file format for scanned images in [File Property] under the [Destination] tab.



7 Specify a job name and job icon in [Job Information] under the [Job Information] tab.

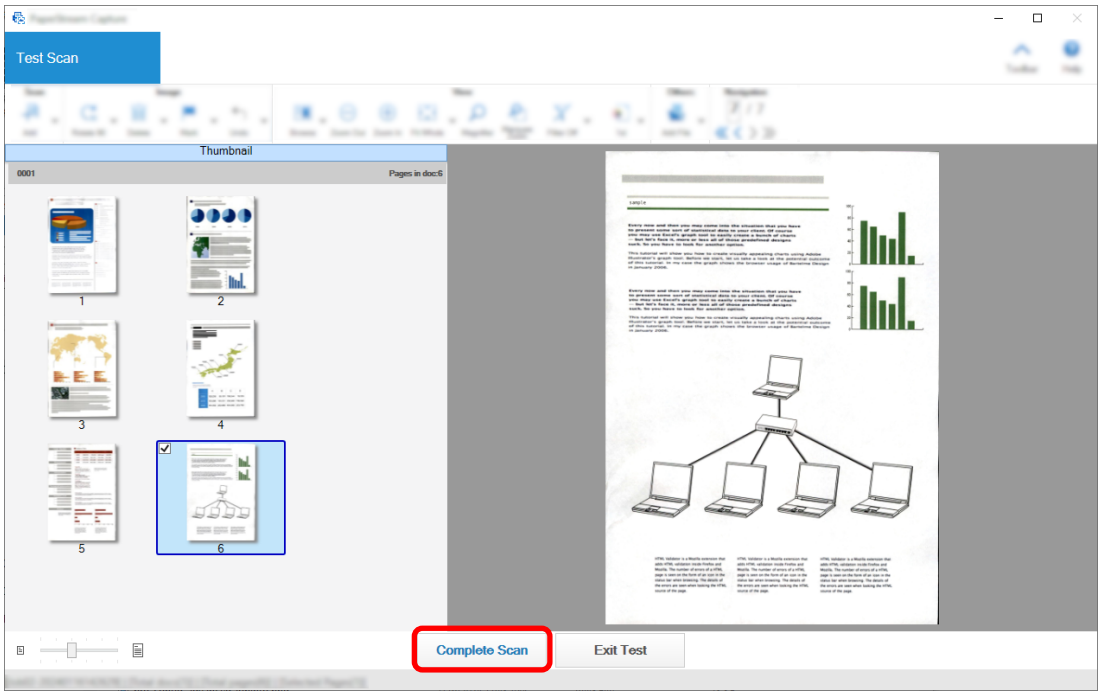


8 Load documents in the scanner and click the [Test Scan] button.



The [Test Scan] window is displayed and the documents are scanned based on the job settings.

9 Check and edit the images and click the [Complete Scan] button.

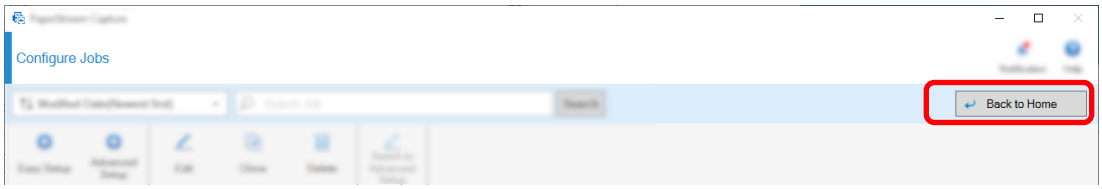


The window that is displayed returns to the [Easy Setup] window.

10 Check the output results and click the [Finish] button.

The window that is displayed returns to the [Configure Jobs] window. The created job is displayed in the [Configure Jobs] window.
This completes the procedure to create a job.

11 Click the [Back to Home] button.



Configuring the More Advanced Scan Settings

This section describes the procedure to create a job in the advanced setup.

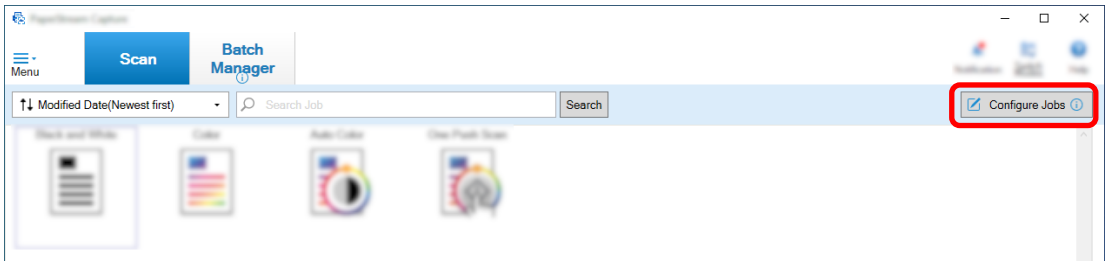
In this section, create a job with the following settings:

Job Example: "PDF Black & White 1"

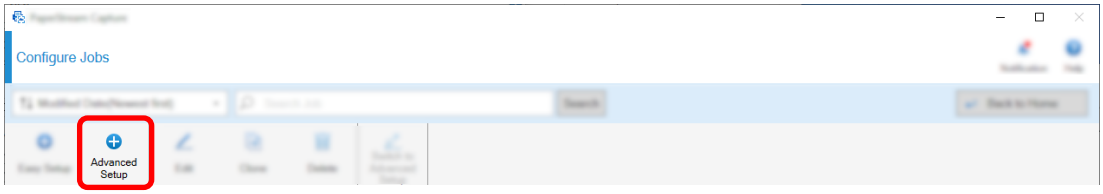
Color Mode: Black & White
Resolution: 200 dpi
Paper Size: A4

Sides: Duplex
File Format: PDF
Destination: "C:\Scan\General_Affairs_Dpt" folder
File Name: Automatically created in the "SCAN+<*Date Scanned*>+<*Time Scanned*>" (SCANyyyyMMddHHmmss) format
Scan multiple pages of document at a time and split the scanned data into multiple files based on the detected blank pages

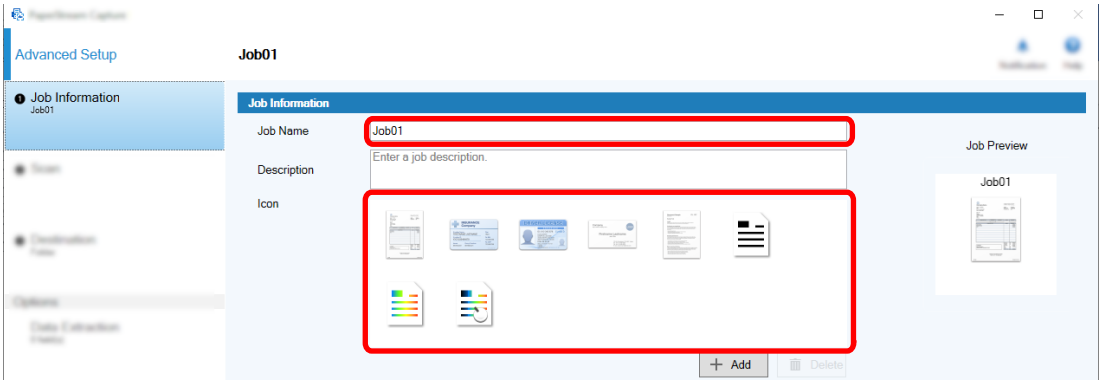
1 On the main PaperStream Capture window, click the [Configure Jobs] button.



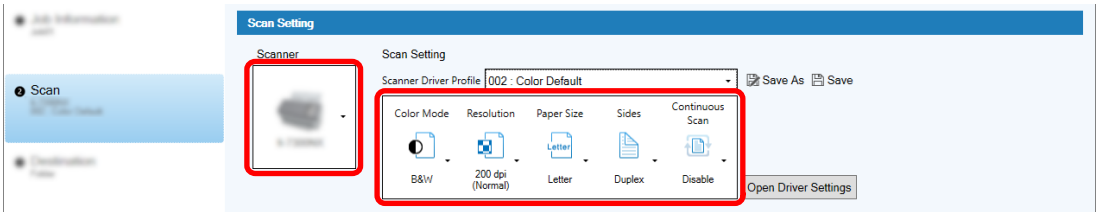
2 Click the [Advanced Setup] button.



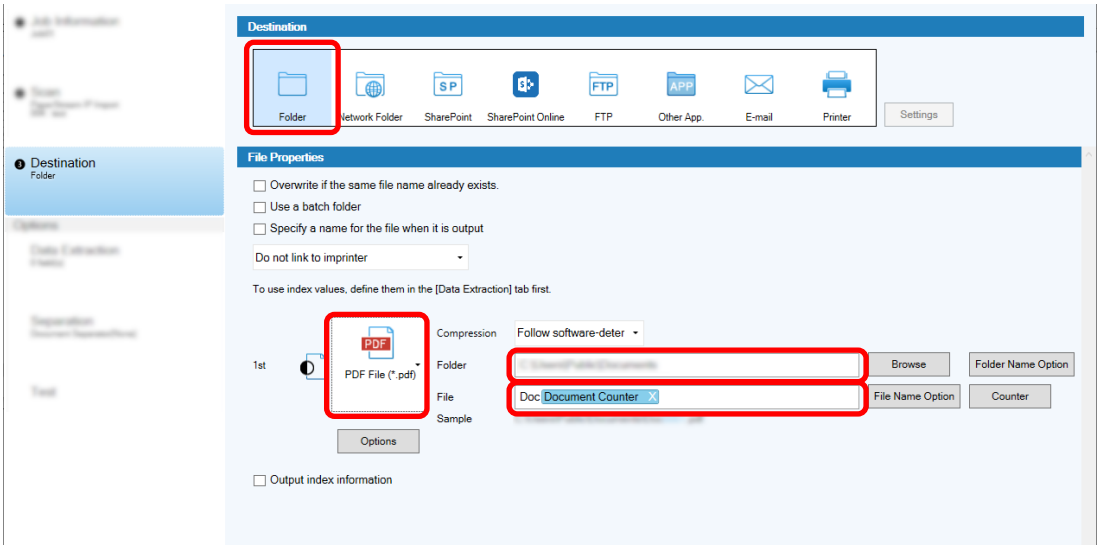
3 In the [Job Information] tab, specify a job name and job icon.



4 Select a scanner to be used for [Scanner] in the [Scan] tab. Also, specify [Image Mode], [Resolution], [Paper Size], and [Sides] in [Scan Settings].



5 In the [Destination] tab, specify an output file format, a file name format based on the File Name Option, and a destination to save files.

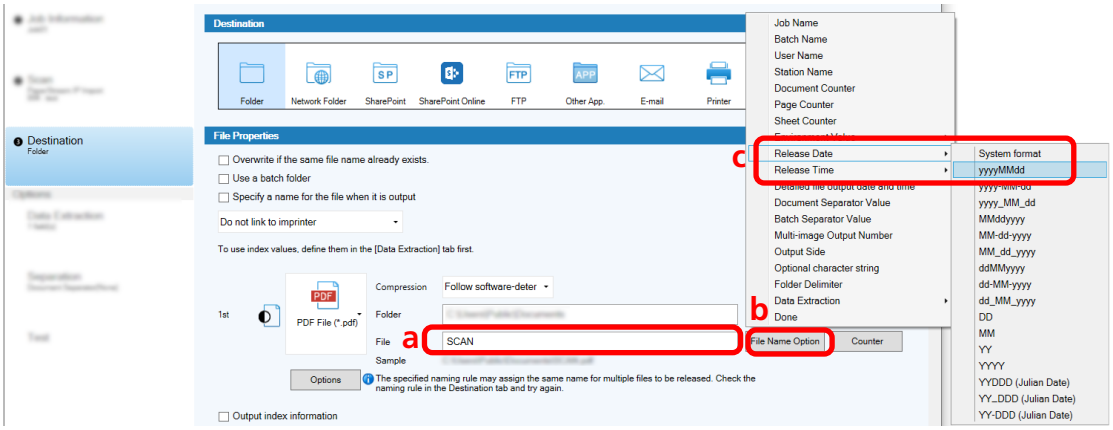


Clicking the [File Name Option] button displays a menu to specify the File Name Option. To set the file name in the "SCAN+<*Date Scanned*>+<*Time Scanned*>" (SCANyyyyMMddHHmmss) format, follow the procedure below:

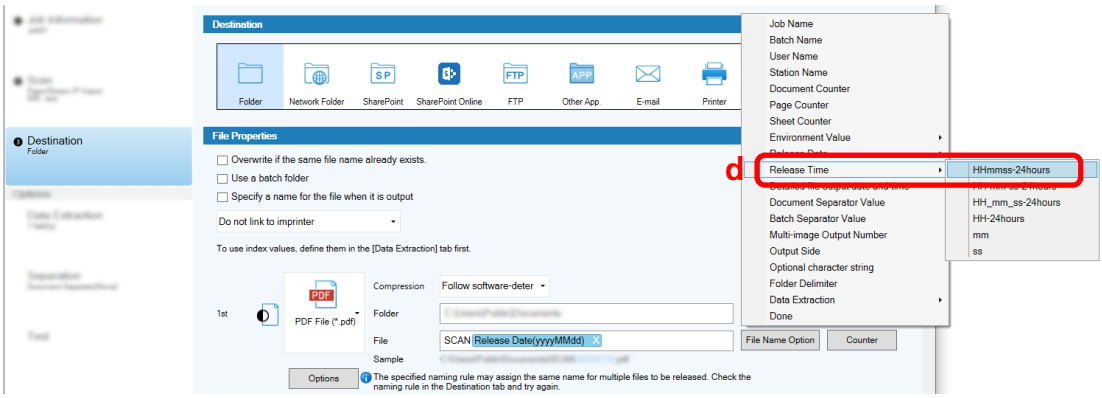
a Enter "SCAN" in [File Name].

b Click the [File Name Option] button.

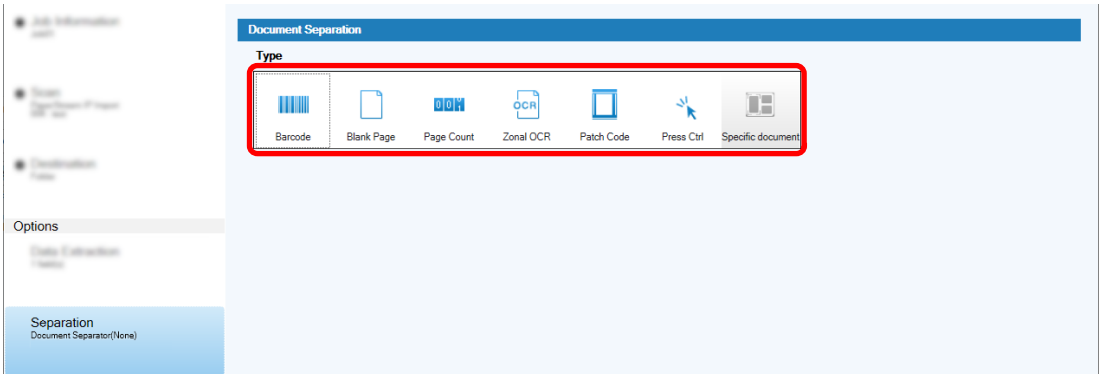
c Select [Release Date] - [yyyyMMdd].



d Select [Release Time] - [HHmmss-24hours].



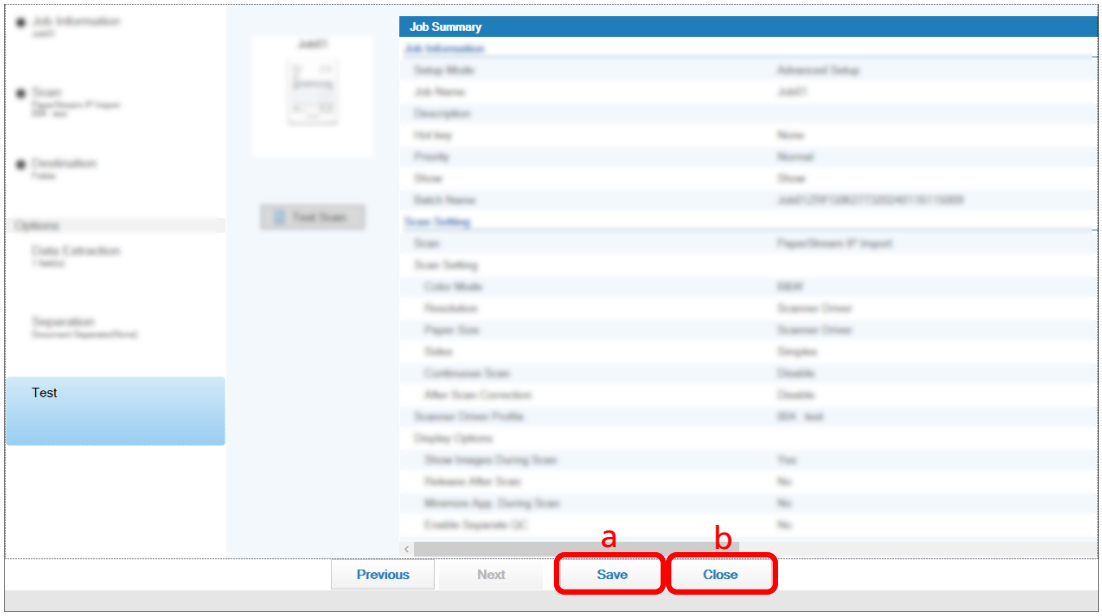
6 In the [Separation] tab, specify a condition (separator) for dividing consecutively scanned documents into multiple files.



7 When you finish changing the settings in each tab, complete the creation of the job.

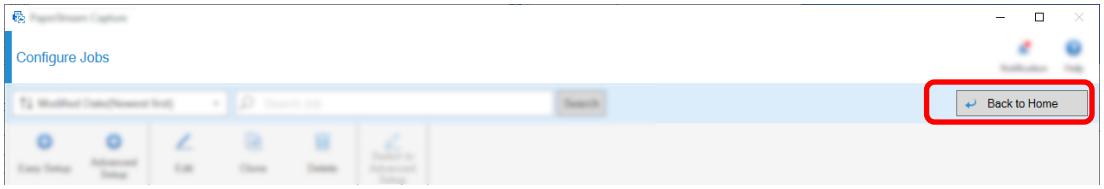
a Click the [Save] button.

b Click the [Close] button.



The window that is displayed returns to the [Configure Jobs] window.

c Click the [Back to Home] button.



The window that is displayed returns to the main window.

Scanning Documents

This section describes how to scan documents using a job in the PaperStream Capture window.

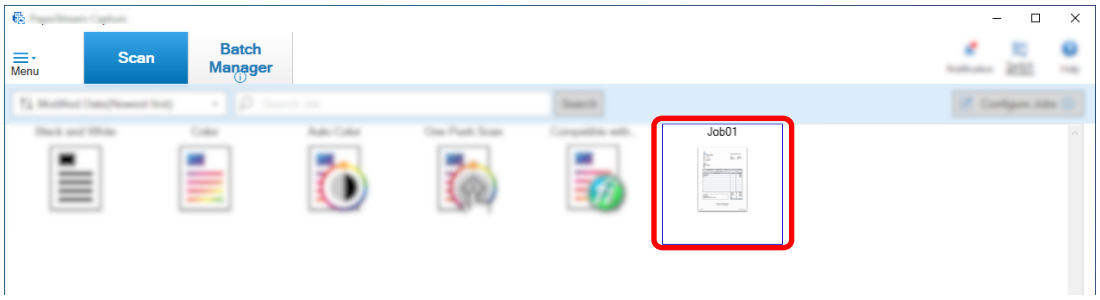
1 **Make sure the scanner is turned on and load the documents you want to scan.**

2 **Double-click on the desktop to start PaperStream Capture.**

The main PaperStream Capture window appears.

3 **In the main PaperStream Capture window, click the icon for the job you want to use.**

Click the icon for the job you want to use ("Job01" in this section). If you have not created a job, click a sample job.

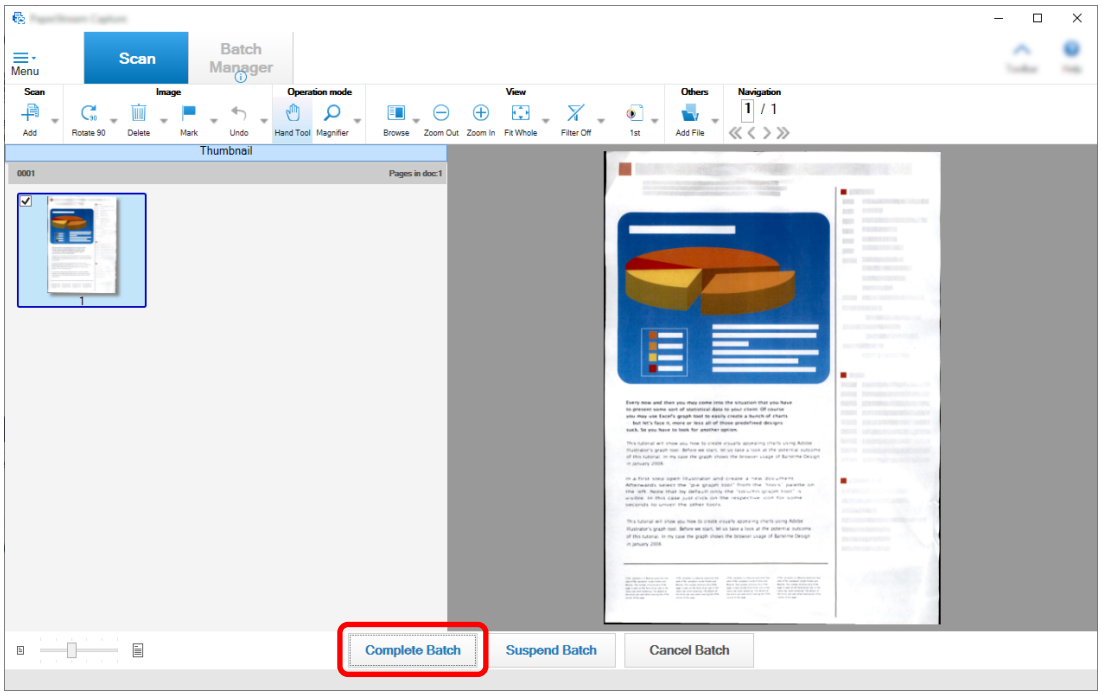


Scanning documents starts.

After the scan is completed, the confirmation window for scanned images is displayed.

4 **Check the scanned images and click the [Complete Batch] button.**

To edit the scanned images, do not click the [Complete Batch] button and refer to Checking and Editing Scanned Images (page 23).

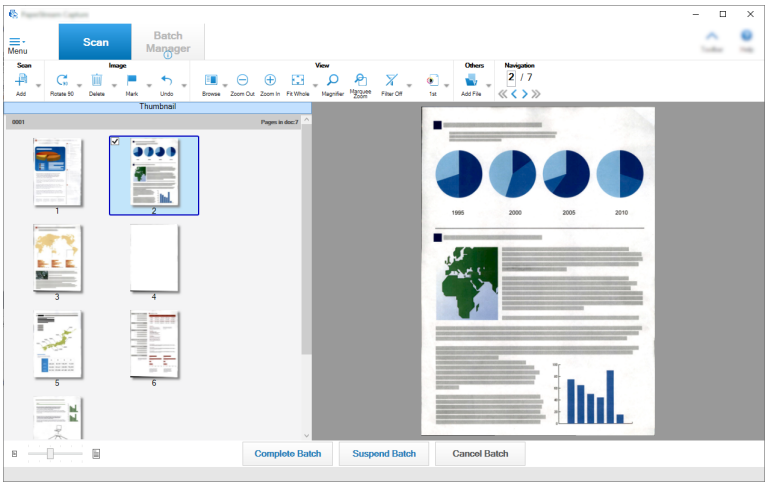


The file is saved to the destination folder specified in the job.

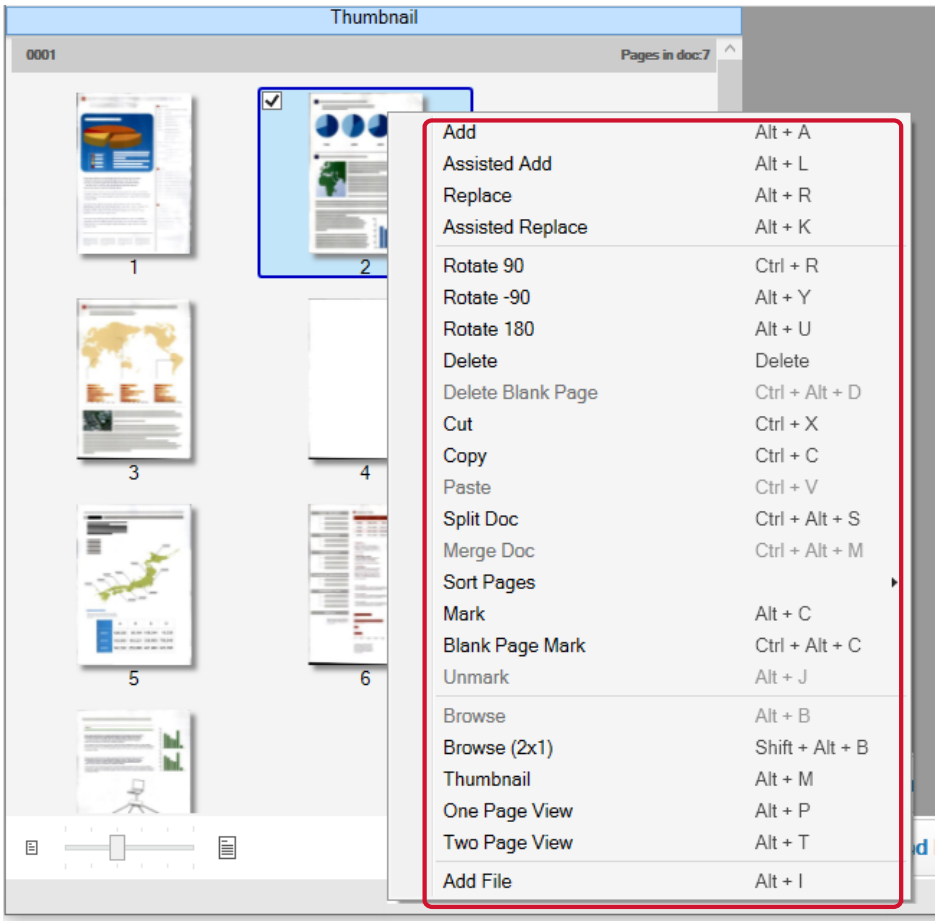
Checking and Editing Scanned Images

After scanning documents, the window for checking the scanned images is displayed. In the window, you can edit the scanned images or rescan documents to replace or add images.

1 Select the target page from the thumbnails.



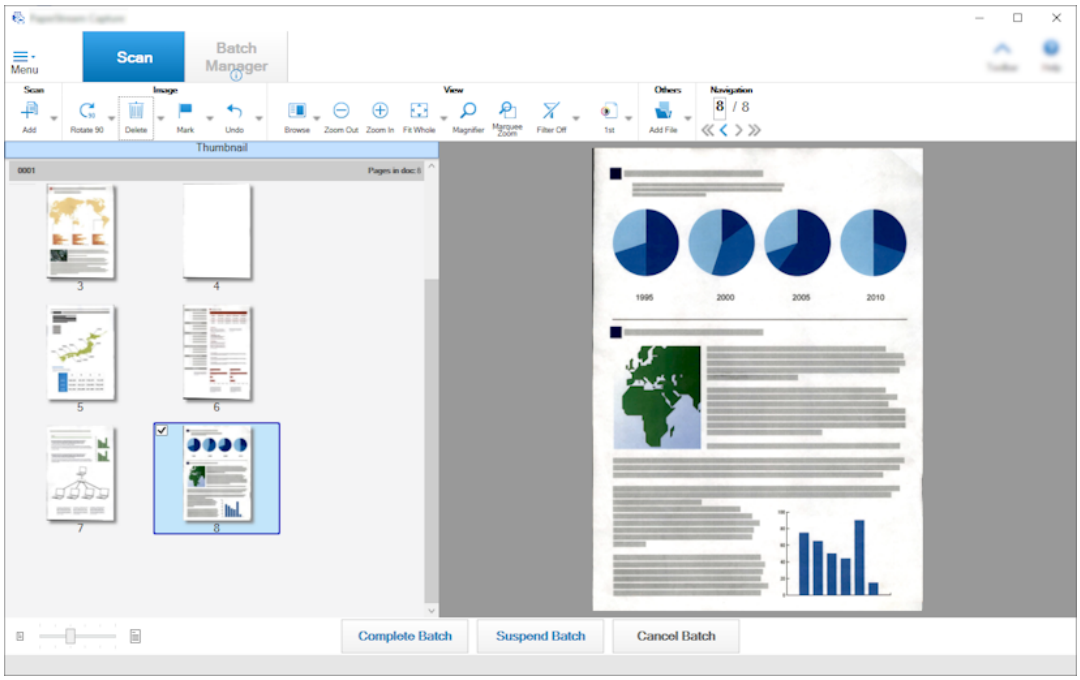
2 Right-click anywhere on the page and select an action for editing the page from the displayed menu.



When scanning a document to add or replace

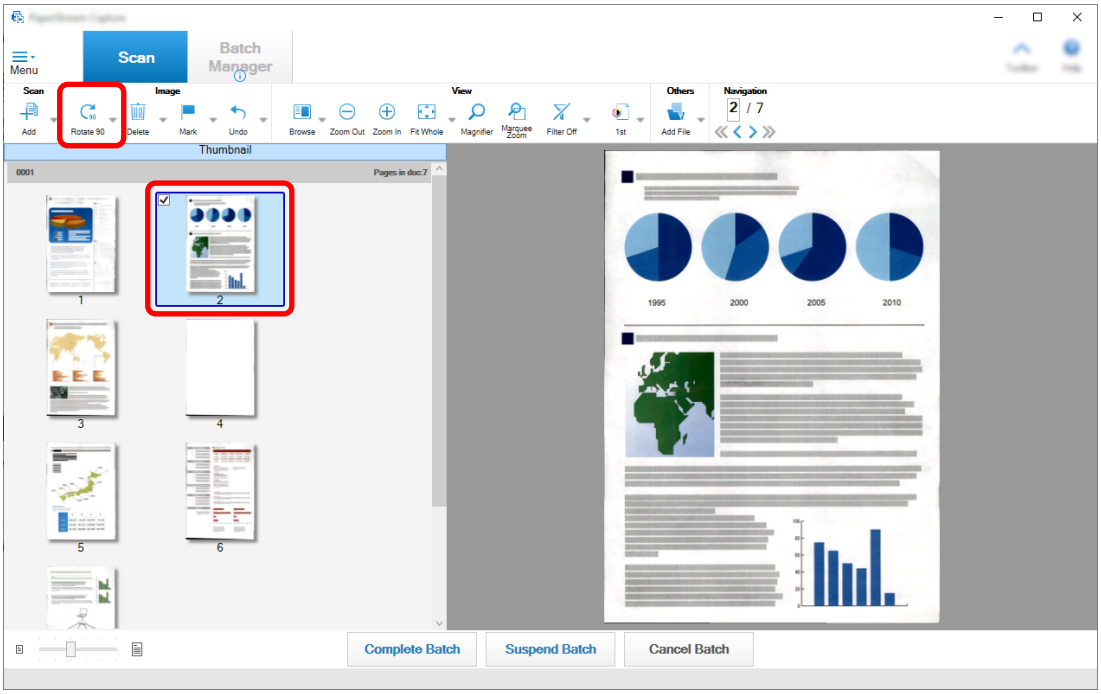
Load a document into the scanner to add or replace.
Clicking [Add] or [Replace] on the right-click menu will start the scanning.
Click [Add] to add the scanned image after the selected page.

Click [Replace] to delete the selected page and insert the scanned image.



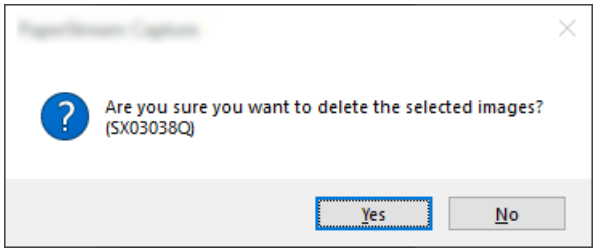
When rotating the selected page

You can rotate a page by clicking [Rotate 90], [Rotate -90], or [Rotate 180] in the right-click menu.



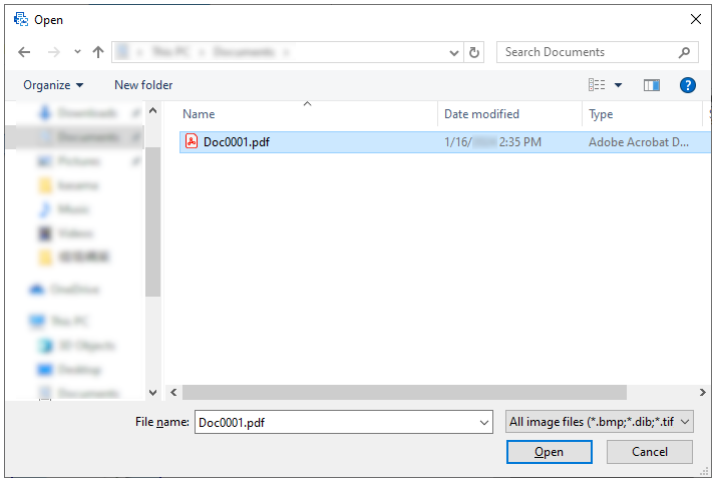
When deleting the selected page

Clicking [Delete] in the right-click menu will display the message shown below. Click [Yes] to delete the selected page.



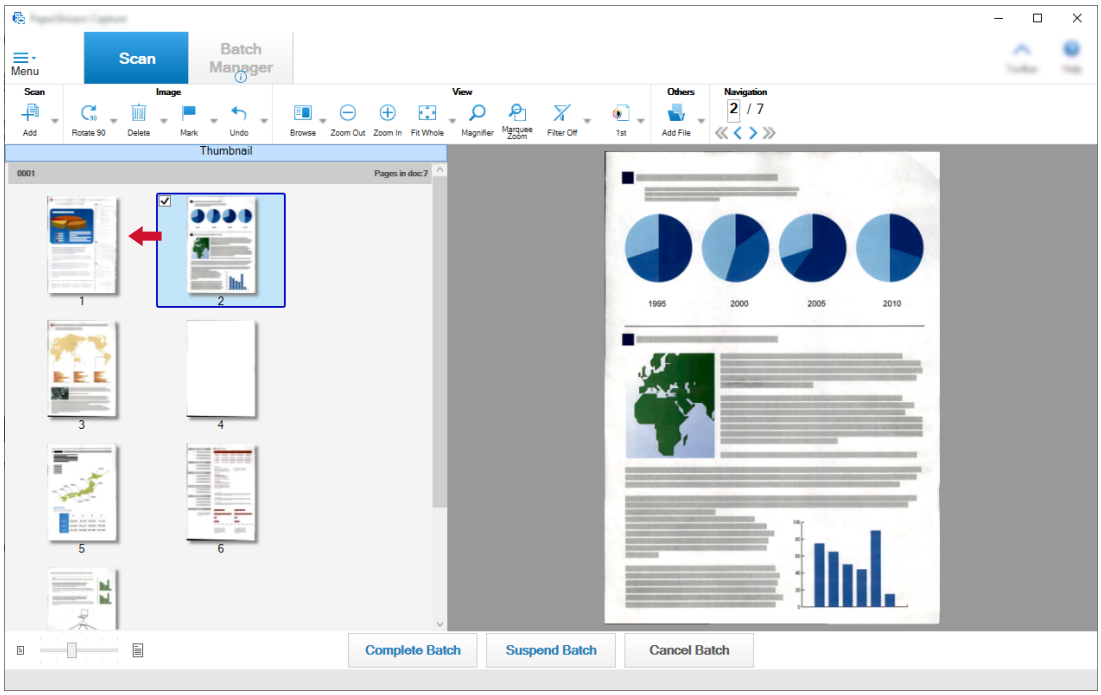
When selecting a saved image to add or replace

Clicking [Add File] in the right-click menu will display the window for selecting a file to add. Select the desired file and click the [Open] button to add the images contained in the file after the selected page.

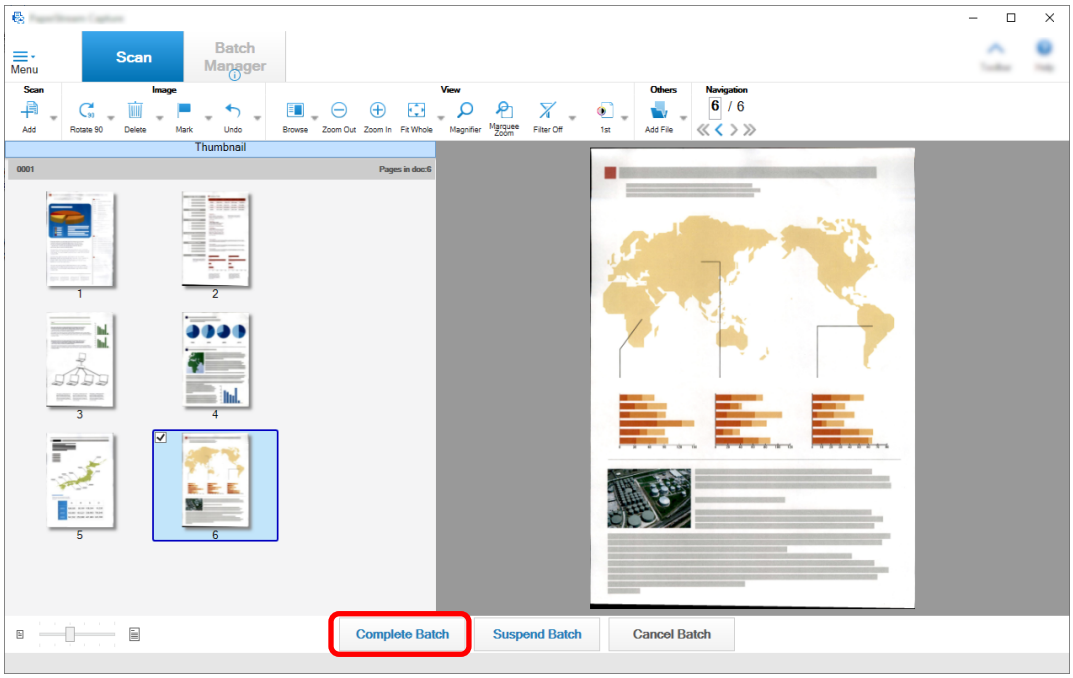


When changing the order of the scanned pages

On the thumbnail list, use the mouse to drag and drop the selected page to the desired position.



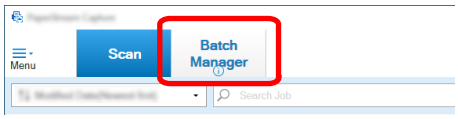
3 Click the [Complete Batch] button to complete the edit.



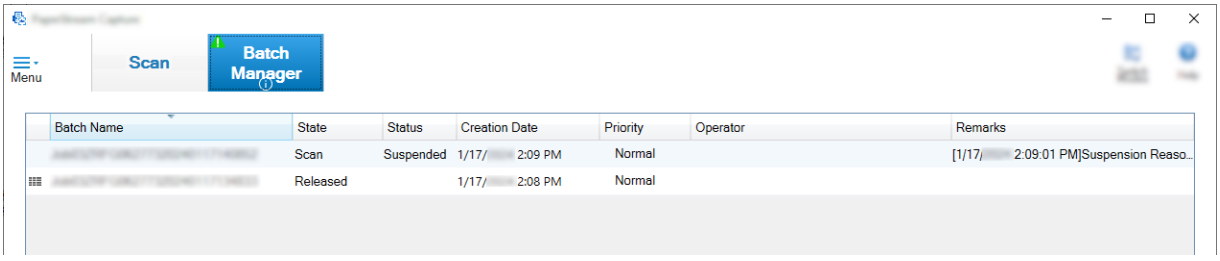
Checking the Scan History

The procedure to restart the batches that have been suspended, or the batches that were in an error status or aborted manually is as follows:

1 Click the [Batch Manager] button in [Menu].

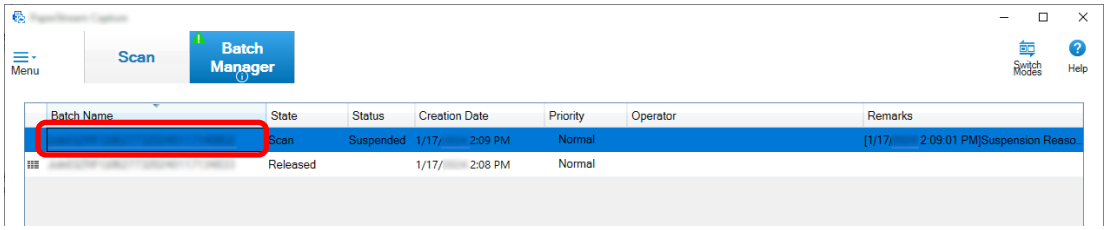


The [Batch Manager] window appears.



The batches that were suspended are displayed as "Suspended" in [Status].
The batches that were aborted manually are displayed as "Aborted" in [Status].
The batches that were aborted automatically due to an error are displayed as "Exception" in [Status].
If the abortion was caused by an error, check and remove the error.

2 Select the batch name of the batch you want to resume and double-click it.



The batch to be resumed is displayed when its status is [Suspended] or [Exception].
Releasing (outputting) process of the batch job restarts when its status is [Aborted].

Making Useful Changes to the Settings

This section explains useful functions on PaperStream Capture for configuring the settings for a job.

Using the Scanner Buttons to Scan Documents

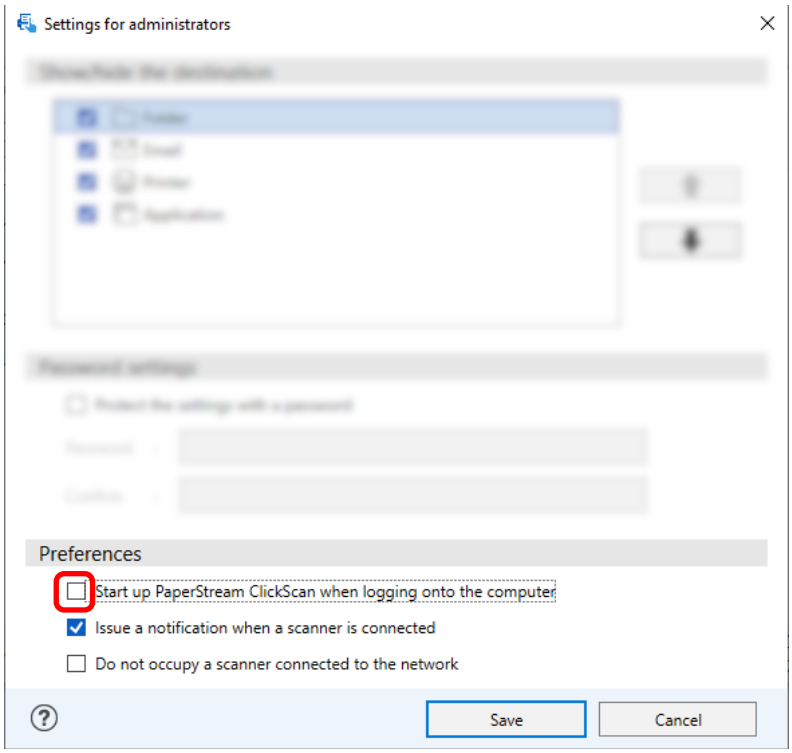
Documents can be scanned by using the scanner buttons ("Scan" and "Send to").
This section explains how to assign a job you want to use to a scanner button and link the button to PaperStream Capture.

ATTENTION

If PaperStream ClickScan is running, pressing the Scan button on the scanner starts up PaperStream ClickScan for scanning. If you want to start up PaperStream Capture or PaperStream Capture Pro for scanning with the Scan button on the scanner, right-click the PaperStream ClickScan icon ( ) on the taskbar and perform one of the following operations in the menu that is displayed.

- When disabling the automatic startup of PaperStream ClickScan

1. Select [Manage destinations].
2. Click in the upper right of the window that appears.
3. In the [Settings for administrators] window that appears, clear the [Start up PaperStream ClickScan when logging onto the computer] check box.



4 Click the [Save] button.

5 Log off from the computer and log on to it again.

- When exiting PaperStream ClickScan temporarily

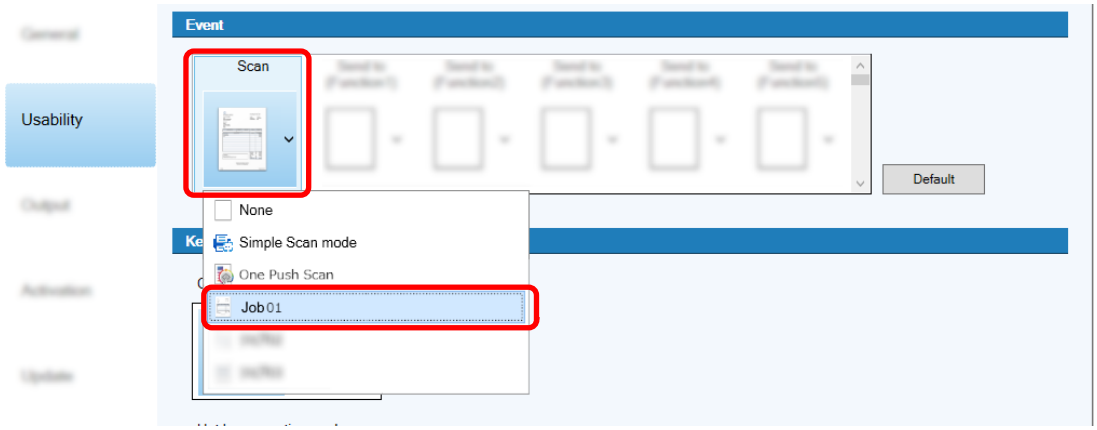
1 Select [Exit].

You need to configure the settings on PaperStream Capture, the computer, and the scanner respectively.

1. Configuring the Settings on PaperStream Capture

1 Click the [Usability] tab on the administrator tool.

2 Click [Scan] and select a job you want to use.



The [Scan] icon switches to the icon of the selected job.

3 Save the settings.

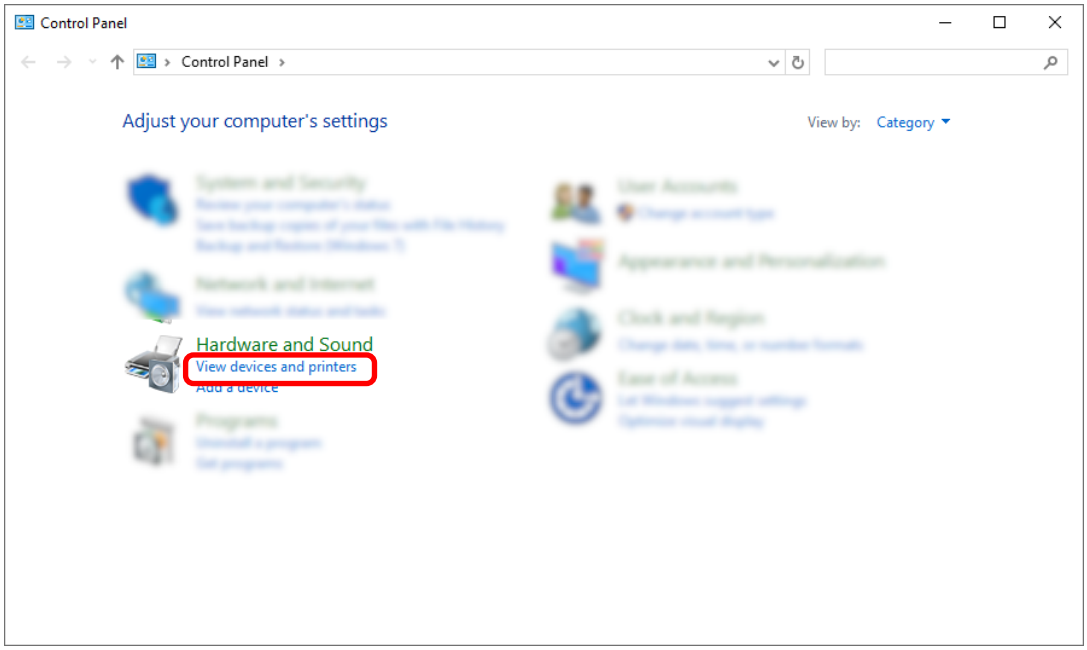
a Click the [Save] button.

b Click the [Close] button.

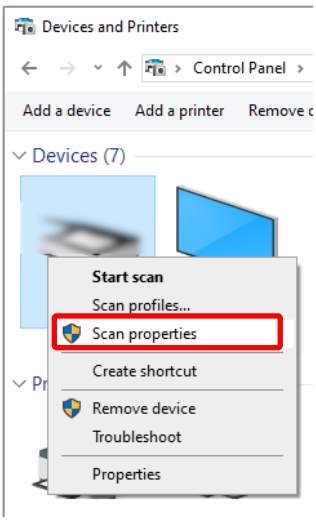
This completes the procedure for configuring the settings on PaperStream Capture.

2. Configuring the Settings on the Computer

1 Open the [Control Panel] window and click [View devices and printers].



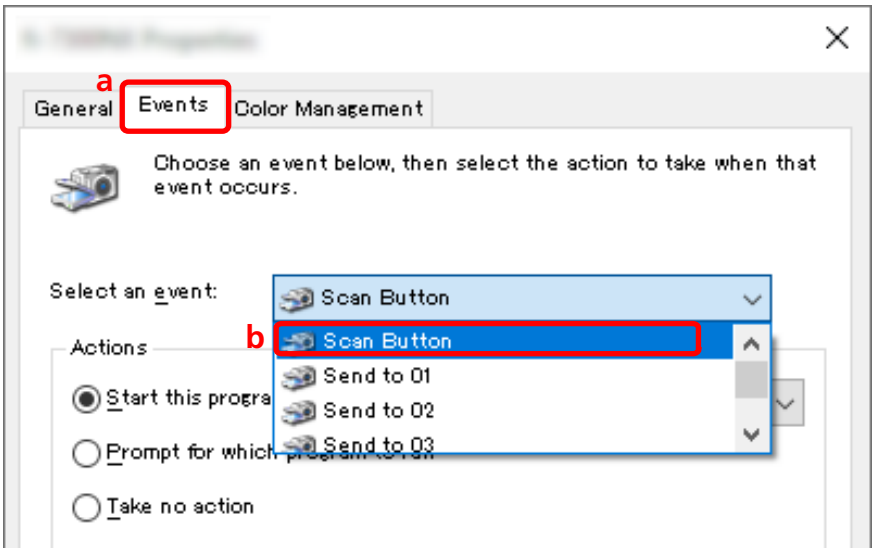
2 Right-click on the scanner icon, and select [Scan properties] from the displayed menu.



3 In the [Events] tab, specify an action to be taken when the Scan button on a scanner is pressed.

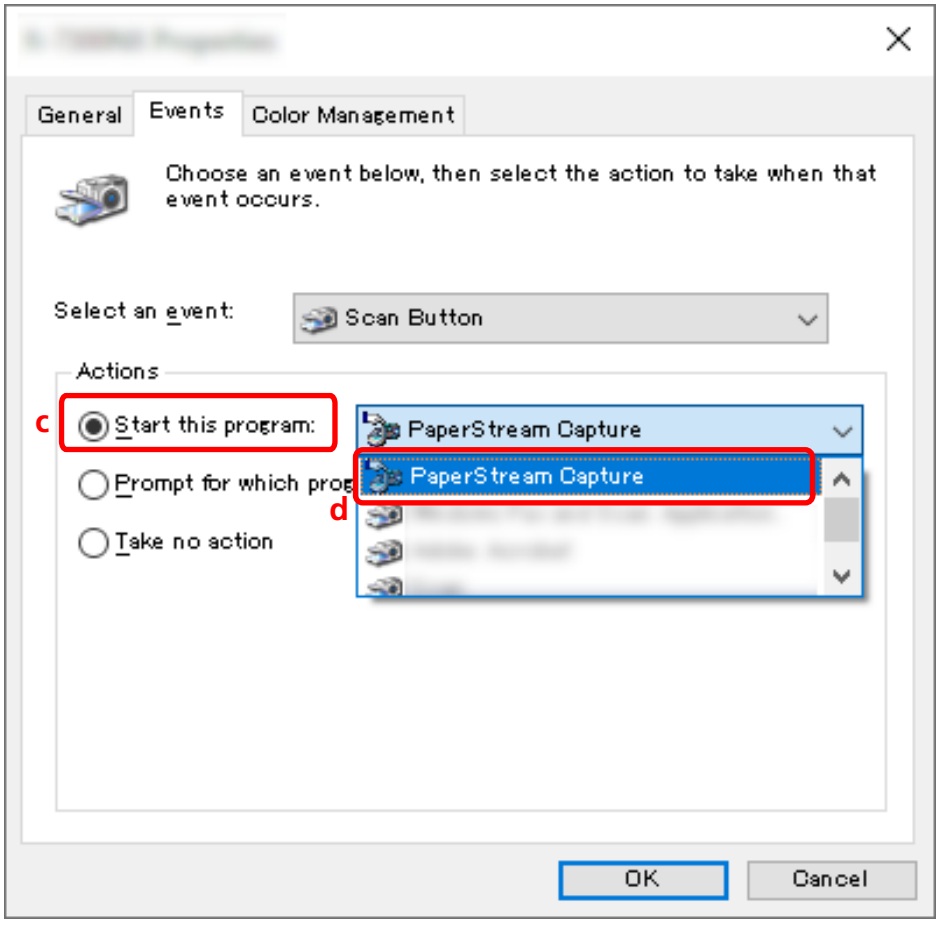
a Click the [Events] tab.

b From the [Select an event] drop-down list, select [Scan Button].



c Select [Start this program], then [PaperStream Capture].

d Click the [OK] button.



4 Restart the computer.

The changes to the settings are enabled. This completes the procedure for configuring the settings on the computer.

HINT

- When connecting a network-accessible scanner to the network in order to use the scanner, install Network Setup Tool and then log on to the computer again or restart the computer. After the computer is restarted, if PaperStream Capture is not set as the application that starts up when a button on the scanner is pressed, start up Button Event Manager for your scanner and set it in the [Button Settings]. For details, refer to the Network Setup Tool Help.

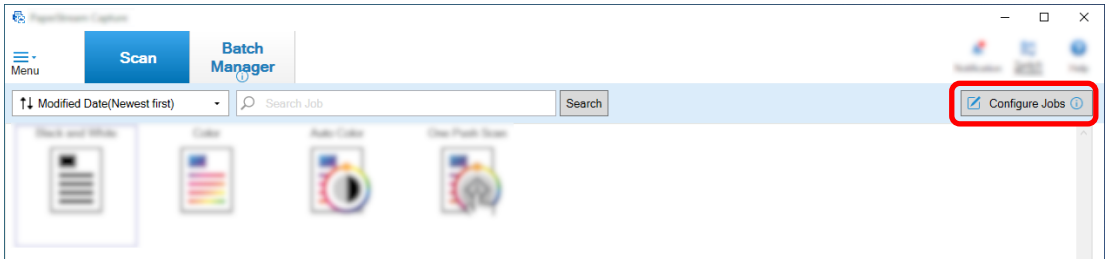
3. Configuring the Settings on the Scanner

The action to be taken when the button on the scanner is pressed may also need to be specified on the scanner.
The setting procedure varies depending on the scanner model.
For details, refer to the section about configuring the settings for the Scan button the scanner in the Operator's Guide for your scanner.

Changing the Image Quality Settings

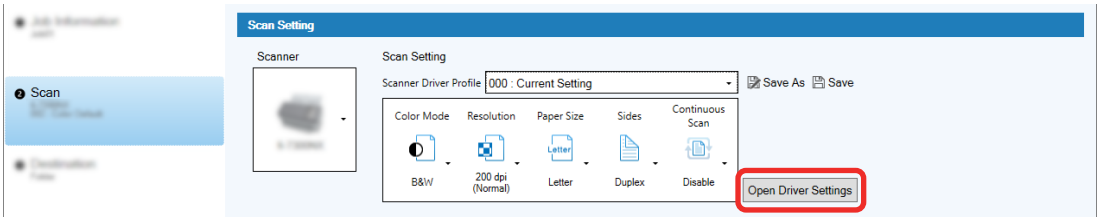
You can change the quality of the scanned images if you find it difficult to read text or recognize figures in the images.
The lower the resolution value is, the smaller the file size is. The higher the value is, the smaller the file size is.
This section describes the procedure in the advanced setup to select the resolution for scanning to change the image quality in the PaperStream IP driver window.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.



2 Select an existing job and click the [Edit] button on the toolbar.

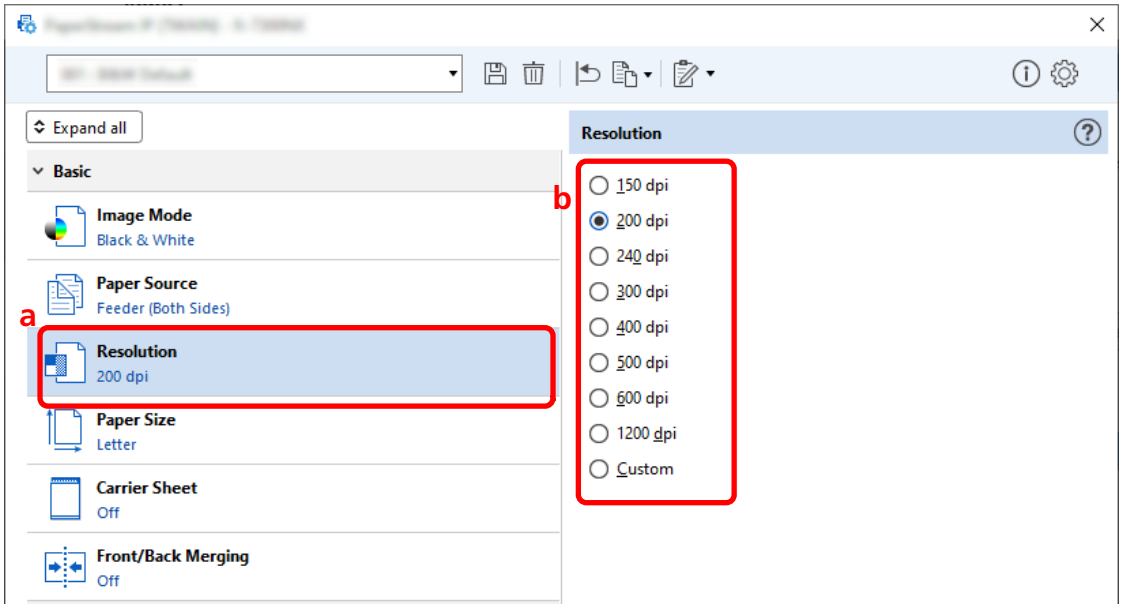
3 **Select the [Scan] tab and click the [Advanced settings] button.**



4 **In the [Advanced settings] window for the driver profile, select [Basic] to configure the settings for scanning.**

a **Select [Resolution].**

b **Select the desired resolution.**

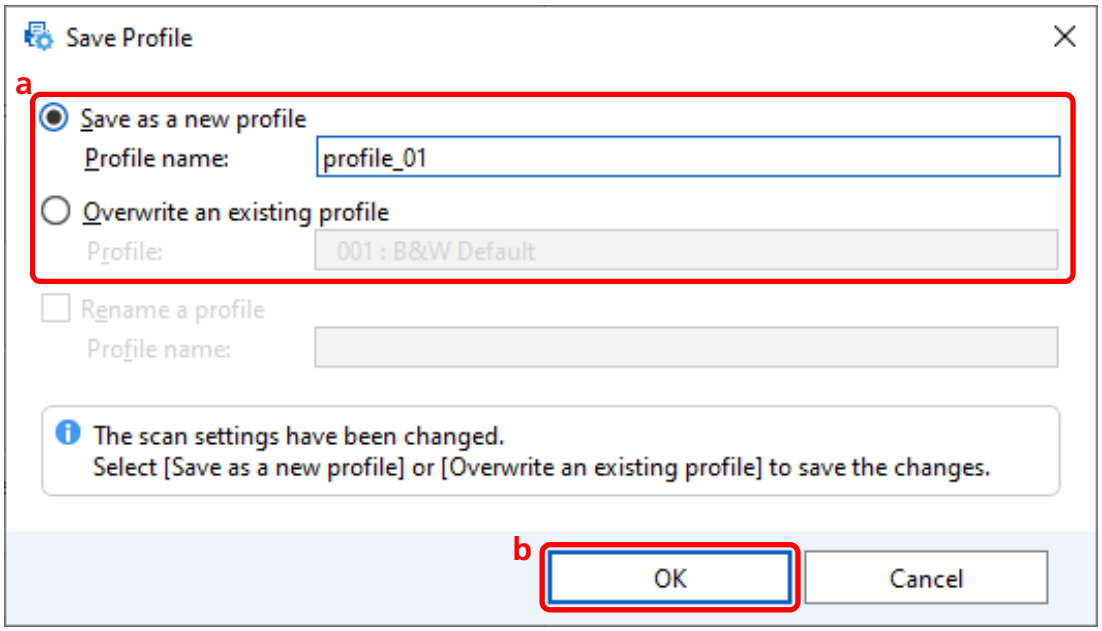


5 **Click the icon for saving a driver profile ( ).**

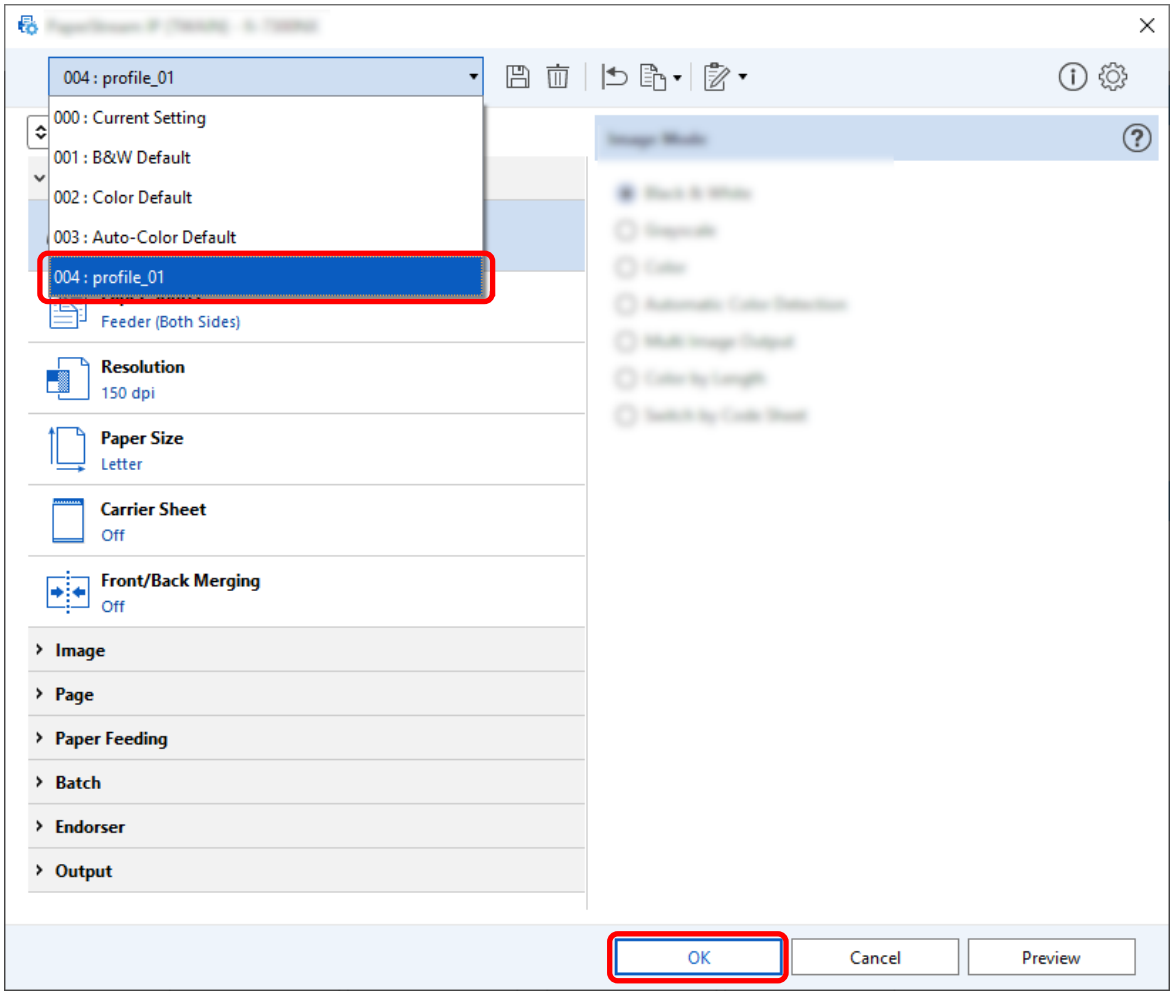
6 **Save a driver profile.**

a **Select [Save as a new profile] or [Overwrite an existing profile] and enter a driver profile name.**

b **Click the [OK] button.**



7 Confirm that the specified driver profile has been added to the list and click the [OK] button.



The [Scan] tab on PaperStream Capture is displayed in front.

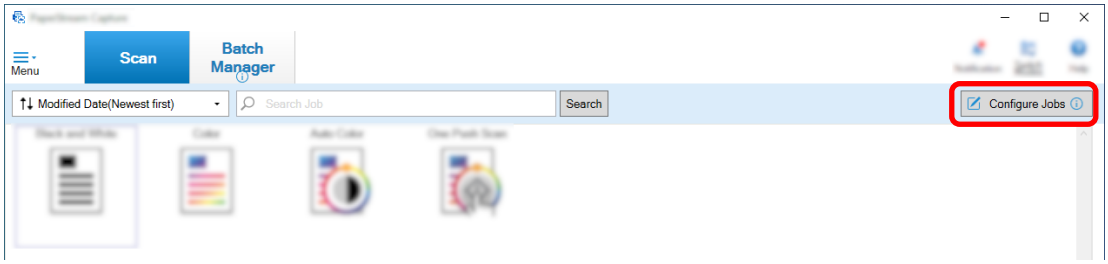
Having Blank Pages Automatically Deleted From Images

If a blank page is detected when a document is being scanned, the blank page is deleted automatically. This section describes how to configure the settings in the advanced setup.

HINT

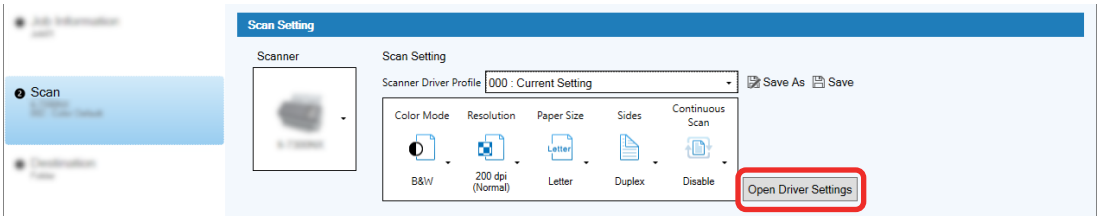
- For the easy setup, you can delete blank pages by selecting [Enable] for [Blank Page Deletion] under [Scan Settings] in the [Scan] tab.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.



2 Select an existing job and click the [Edit] button on the toolbar.

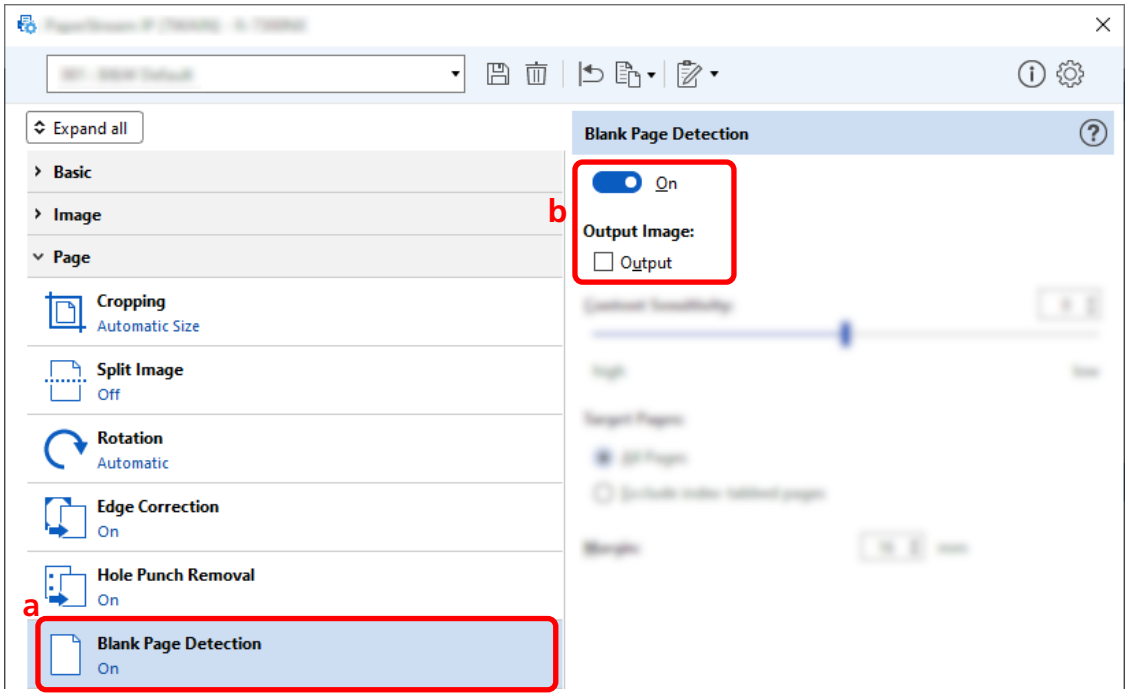
3 Select the [Scan] tab and click the [Advanced settings] button.



4 In the [Advanced settings] window for the driver profile, select [Page] to configure the settings for scanning.

a Select [Blank Page Detection].

b Set it to [On] and clear the [Output] check box.

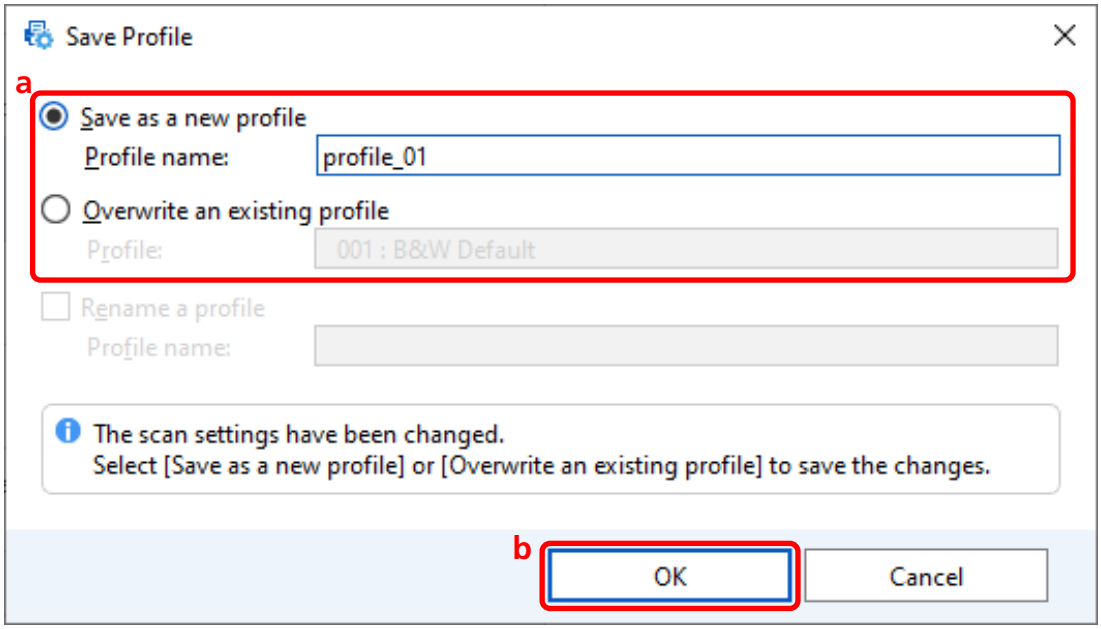


5 Click the icon for saving a driver profile ( ).

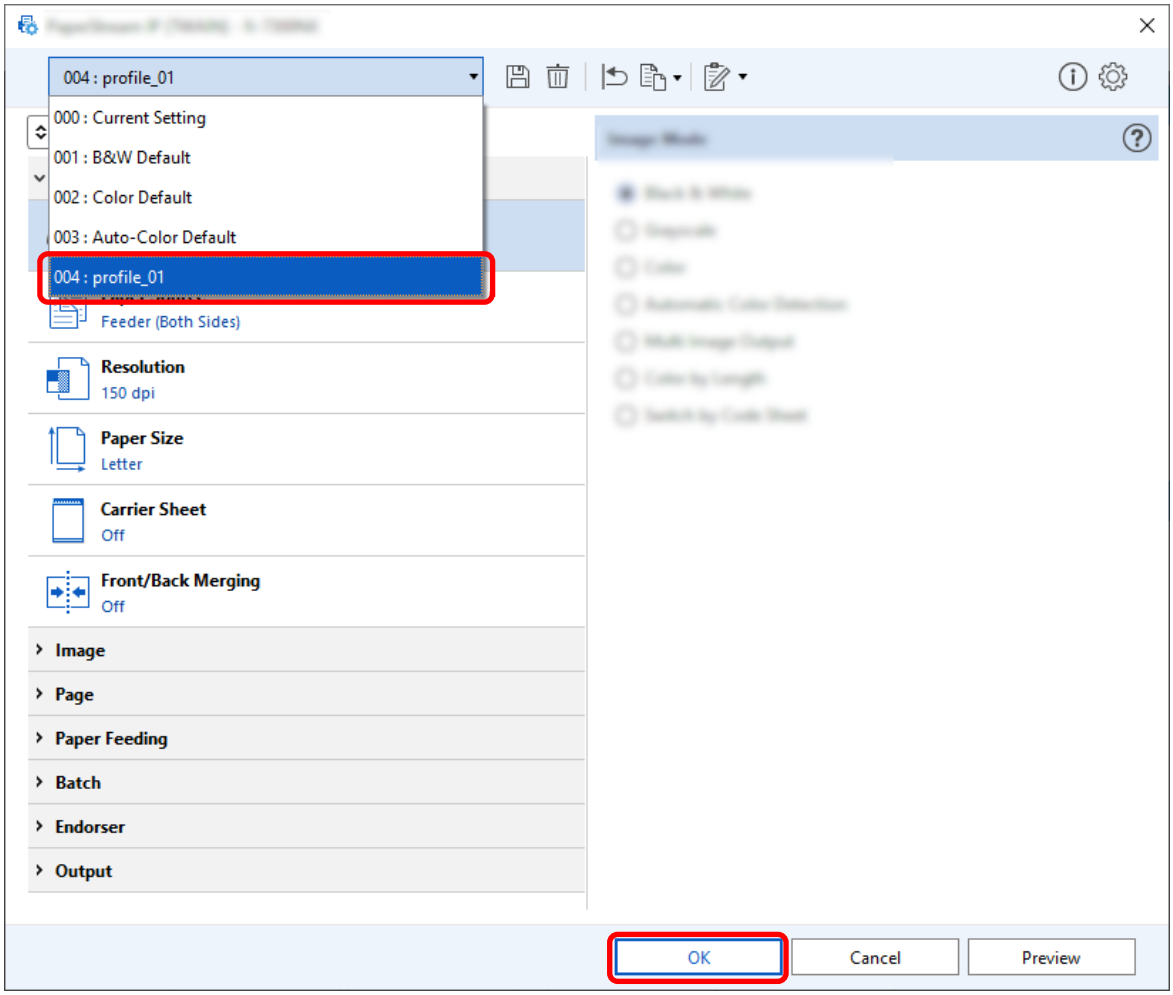
6 Save a driver profile.

a Select [Save as a new profile] or [Overwrite an existing profile] and enter a driver profile name.

b Click the [OK] button.



7 Confirm that the specified driver profile has been added to the list and click the [OK] button.

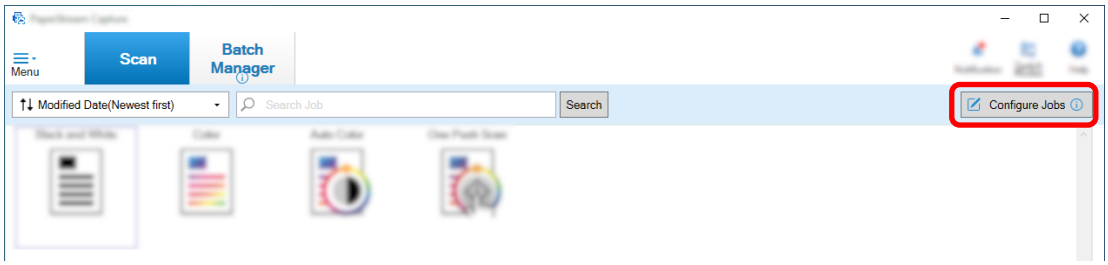


The [Scan] tab on PaperStream Capture is displayed in front.

Saving Images with the Same Colors as the Colors of the Scanned Documents

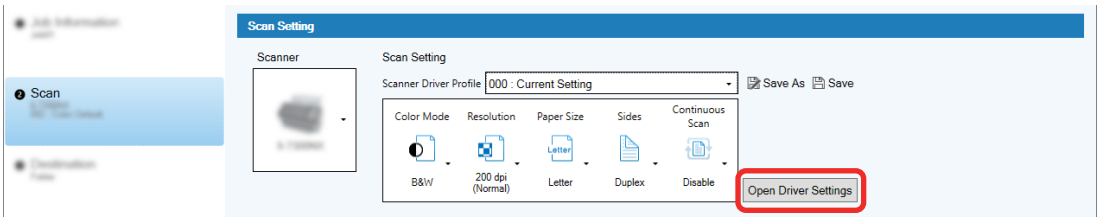
The scanner can automatically detect whether a scanned document is in color or monochrome and output an image accordingly.
With this function, even if both colored and monochrome documents are in a batch to be scanned, you do not need to change the scan settings according to each document.
This section describes the procedure in the advanced setup to specify the automatic color detection and select the resolution for the scanned image in each color mode.

1 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



2 **Select an existing job and click the [Edit] button on the toolbar.**

3 **Select the [Scan] tab and click the [Advanced settings] button.**

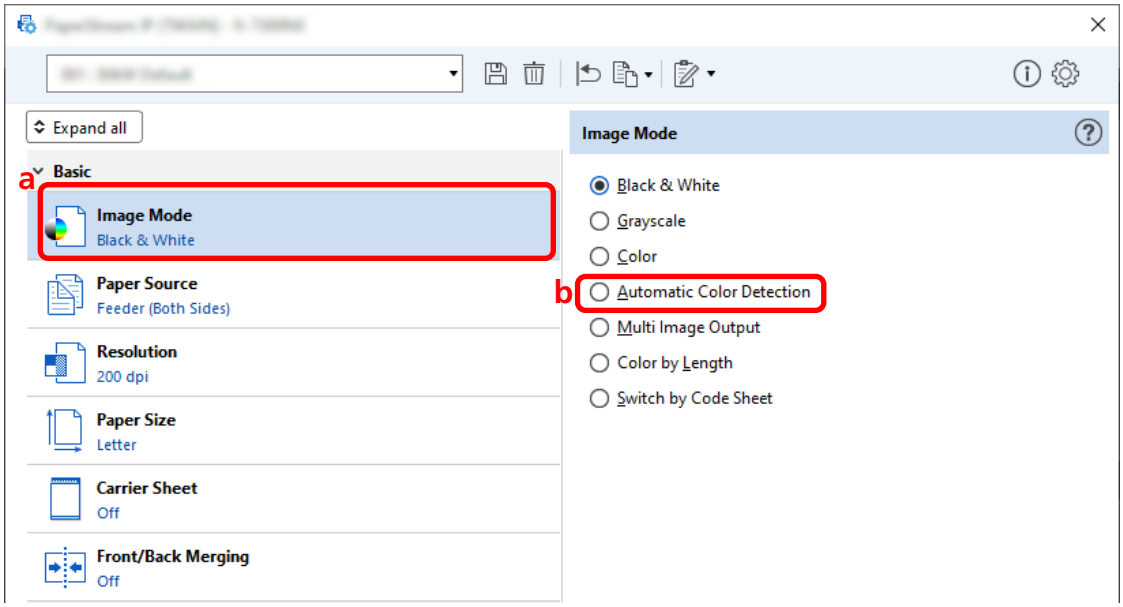


4 **In the [Advanced settings] window for the driver profile, select [Basic] to configure the settings for scanning.**

a **Select [Image Mode].**

b **Select [Automatic Color Detection].**

c **Select a tab and adjust the resolution for each color mode.**

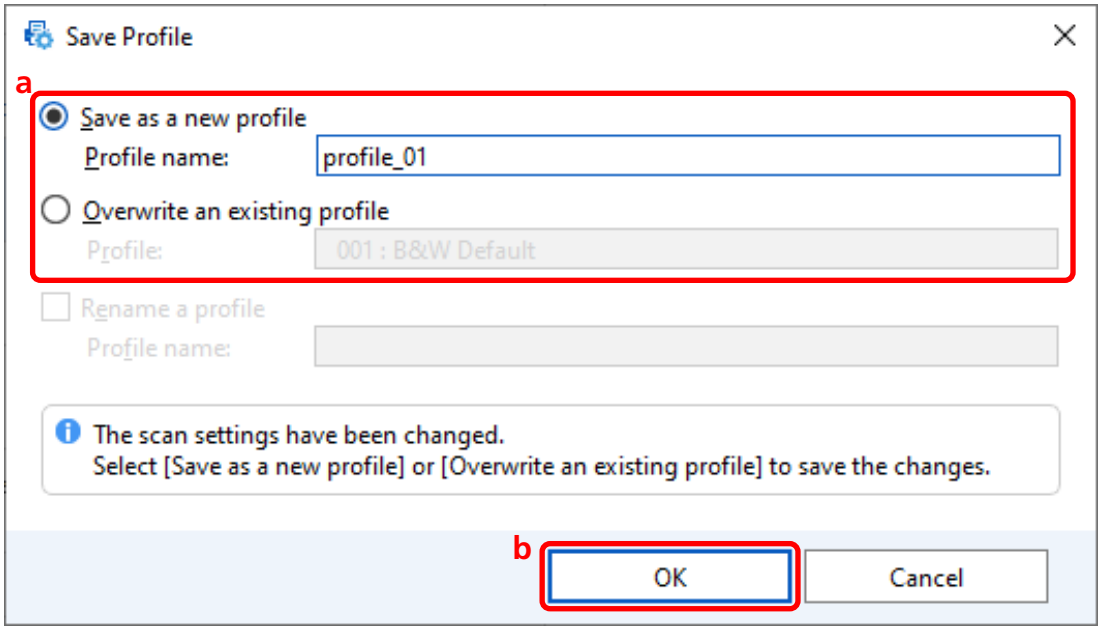


5 **Click the icon for saving a driver profile ( ).**

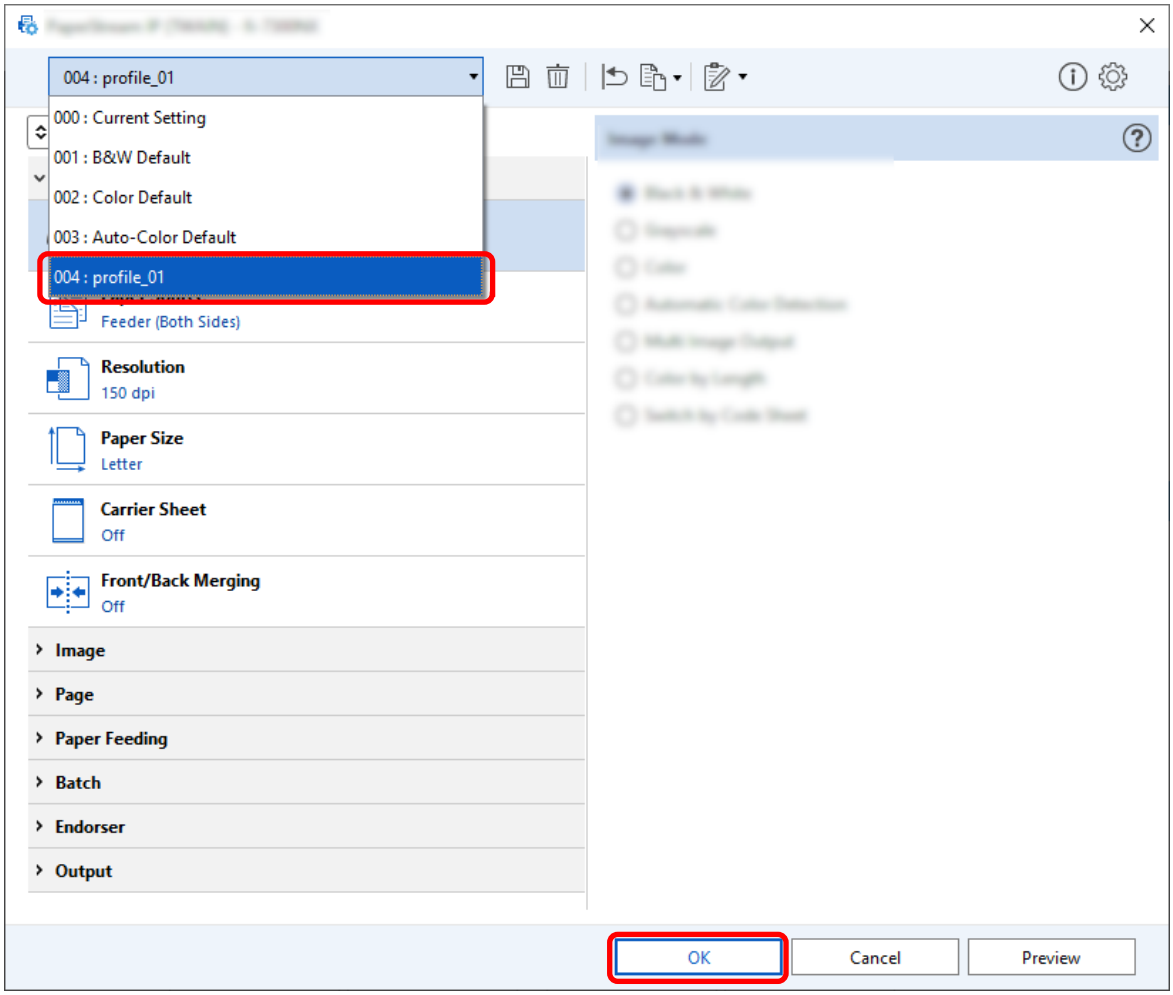
6 Save a driver profile.

a Select [Save as a new profile] or [Overwrite an existing profile] and enter a driver profile name.

b Click the [OK] button.



7 Confirm that the specified driver profile has been added to the list and click the [OK] button.

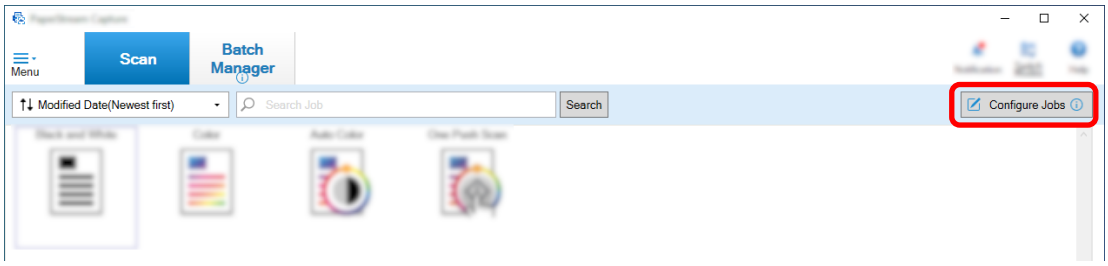


The [Scan] tab on PaperStream Capture is displayed in front.

Correcting the Image Orientation Automatically

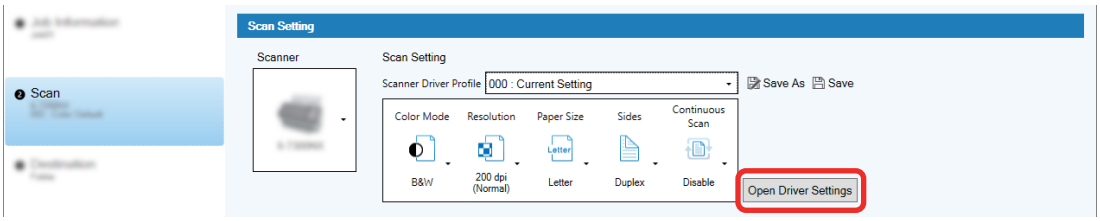
The image orientation is automatically determined based on the content, and the image is output with the correct orientation.
The image orientation may not be corrected properly depending on the condition of the documents.
This section describes how to configure the settings in the advanced setup to automatically correct the image orientation according to the orientation of the text.

1 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



2 **Select an existing job and click the [Edit] button on the toolbar.**

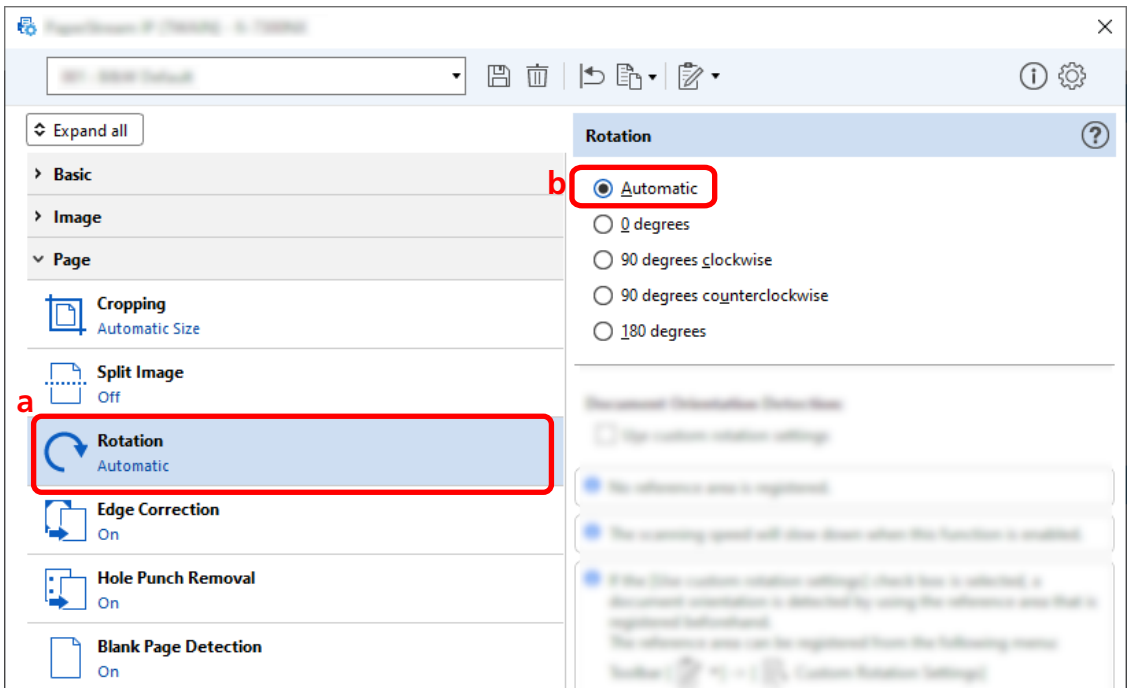
3 **Select the [Scan] tab and click the [Advanced settings] button.**



4 **In the [Advanced settings] window for the driver profile, select [Page] to configure the settings for scanning.**

a **Select [Rotation].**

b **Select [Automatic].**

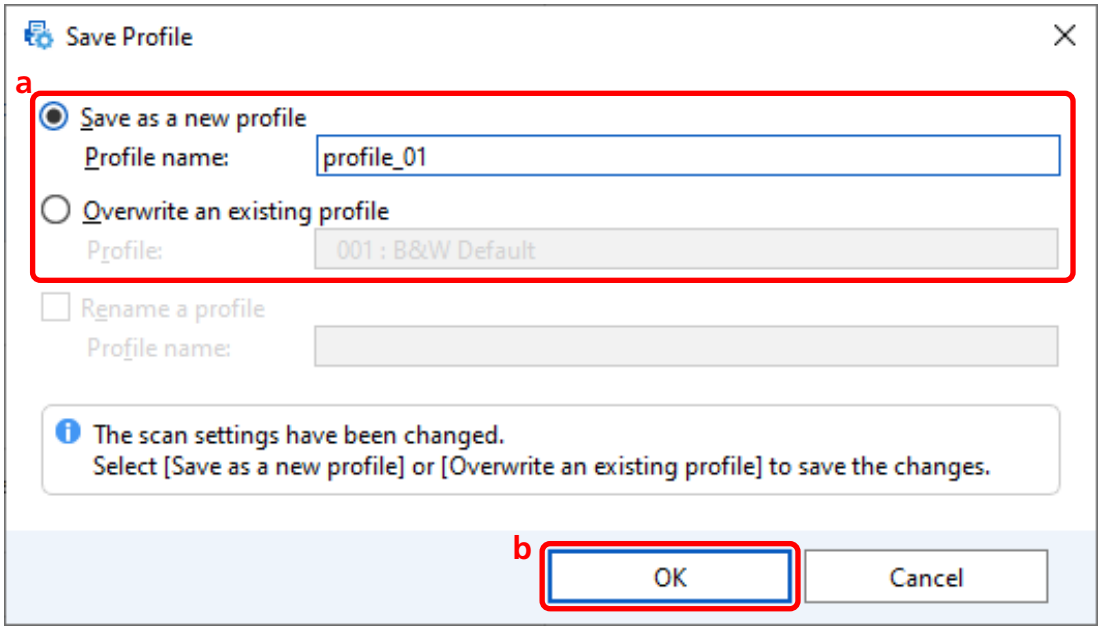


5 **Click the icon for saving a driver profile ( ).**

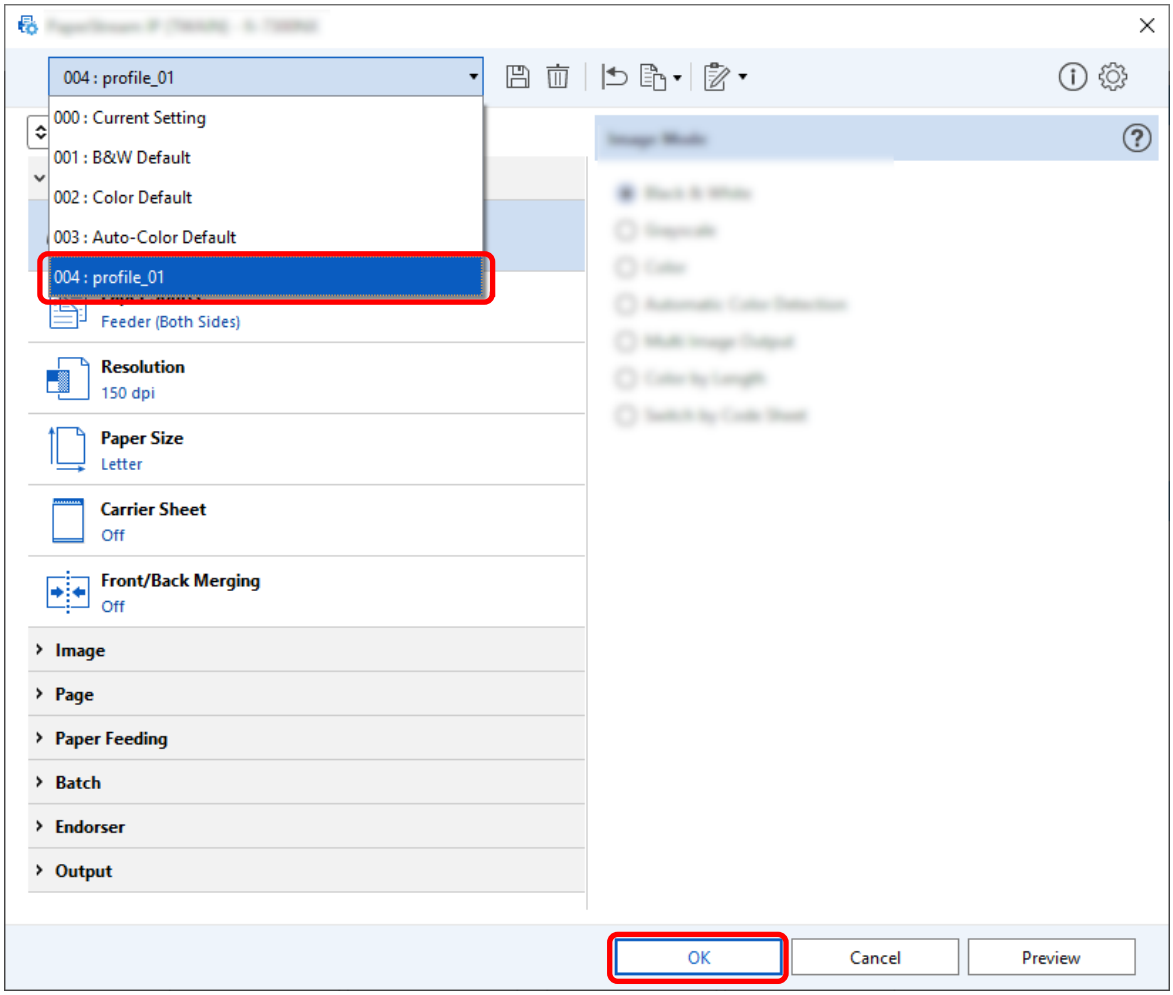
6 Save a driver profile.

a Select [Save as a new profile] or [Overwrite an existing profile] and enter a driver profile name.

b Click the [OK] button.



7 Confirm that the specified driver profile has been added to the list and click the [OK] button.

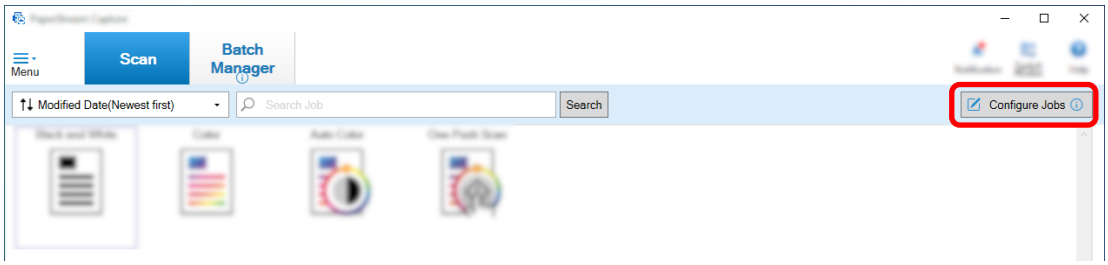


The [Scan] tab on PaperStream Capture is displayed in front.

Setting [Hole Punch Removal] to [Off]

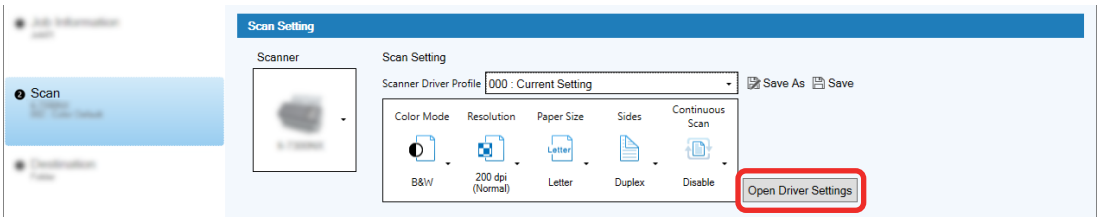
[Hole Punch Removal] is a function that fills in the punch holes in the scanned images if the documents have punch holes.
When [Hole Punch Removal] is set to [On], holes are removed from the scanned images. If round shapes on documents are recognized as holes and are removed, it is recommended to set [Hole Punch Removal] to [Off].

1 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



2 **Select an existing job and click the [Edit] button on the toolbar.**

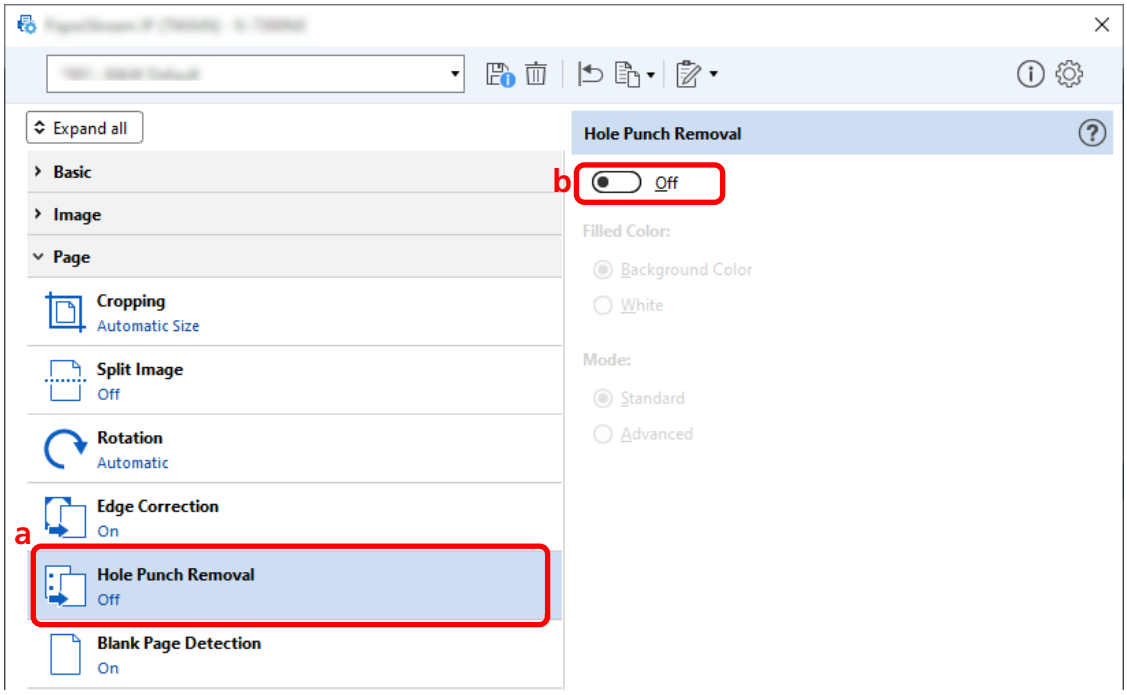
3 **Select the [Scan] tab and click the [Advanced settings] button.**



4 **In the [Advanced settings] window for the driver profile, select [Page] to configure the settings for scanning.**

a **Select [Hole Punch Removal].**

b **Select [Off].**

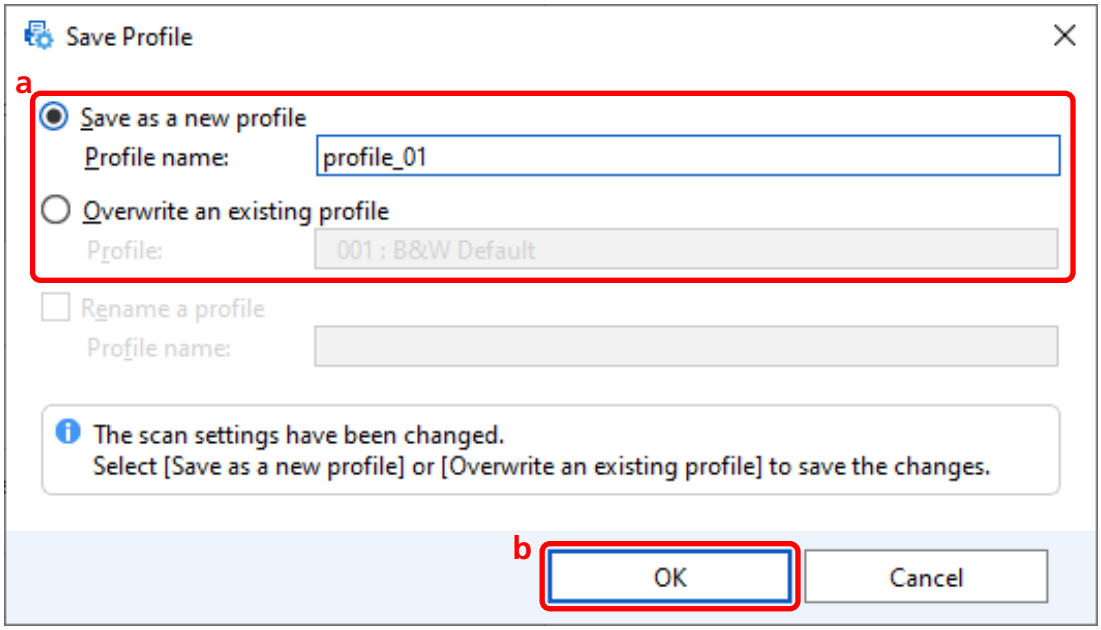


5 **Click the icon for saving a driver profile ( ).**

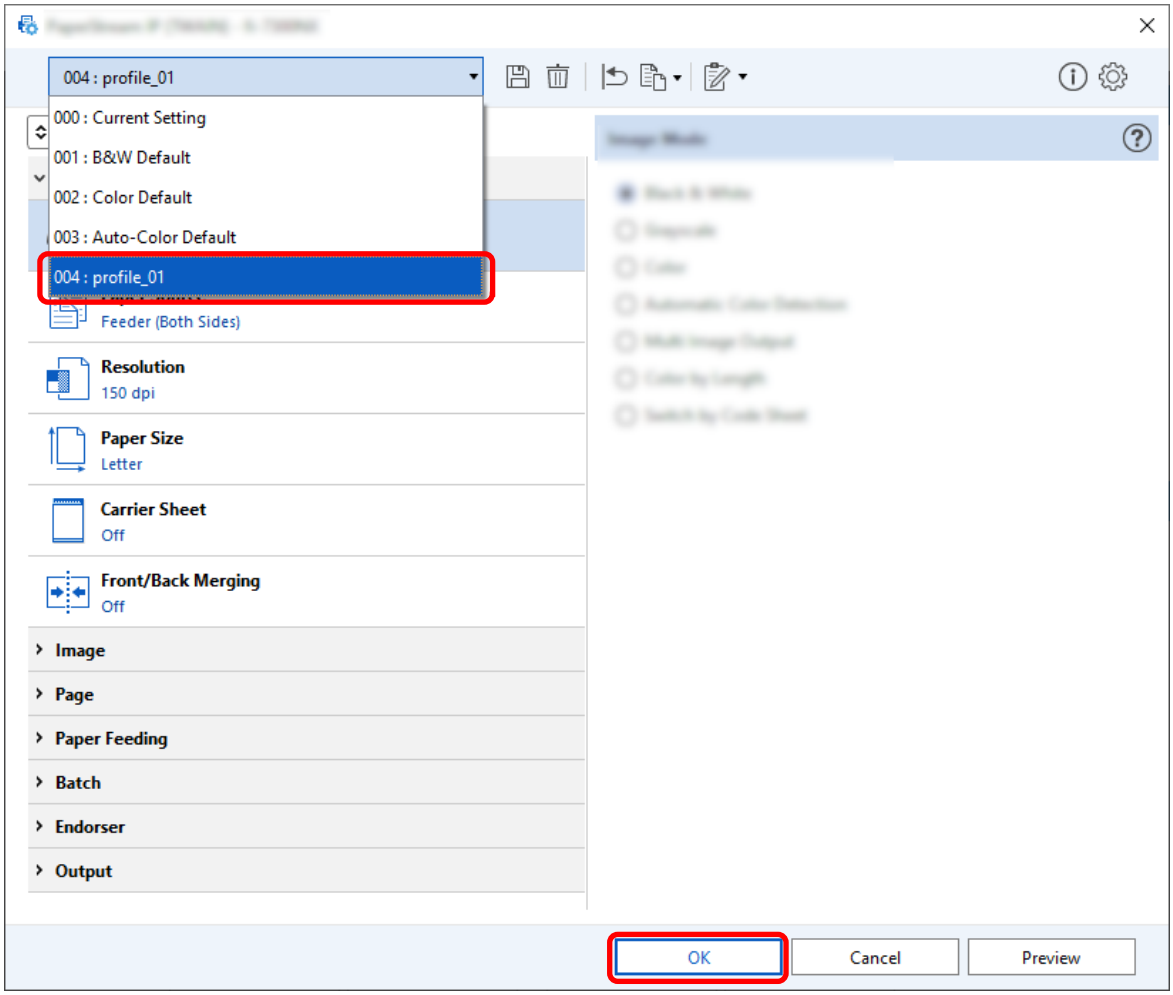
6 Save a driver profile.

a Select [Save as a new profile] or [Overwrite an existing profile] and enter a driver profile name.

b Click the [OK] button.



7 Confirm that the specified driver profile has been added to the list and click the [OK] button.

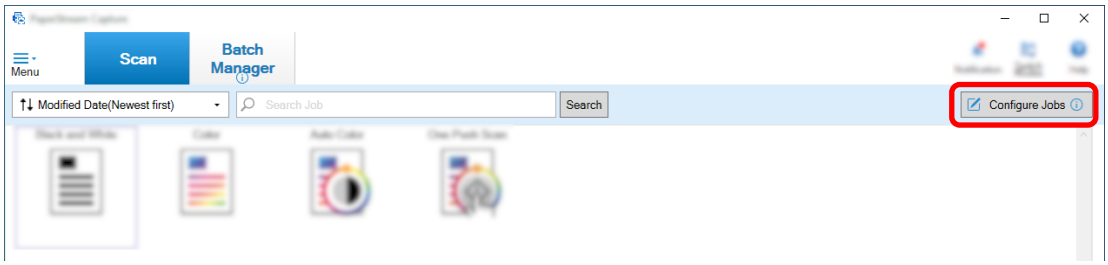


The [Scan] tab on PaperStream Capture is displayed in front.

Setting to Show or Hide the Window During or After the Scan

You can select whether to display the scanned images during or after the scan.
The following procedure describes how to show or hide the scanned images and show or hide the PaperStream Capture window.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

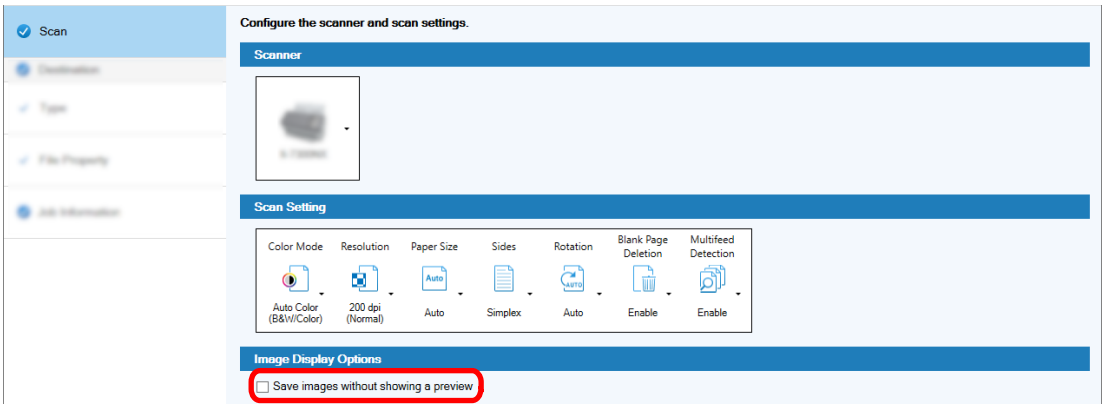


2 Select an existing job and click the [Edit] button on the toolbar.

3 Select whether to show or hide the window during or after the scan.

- For the easy setup

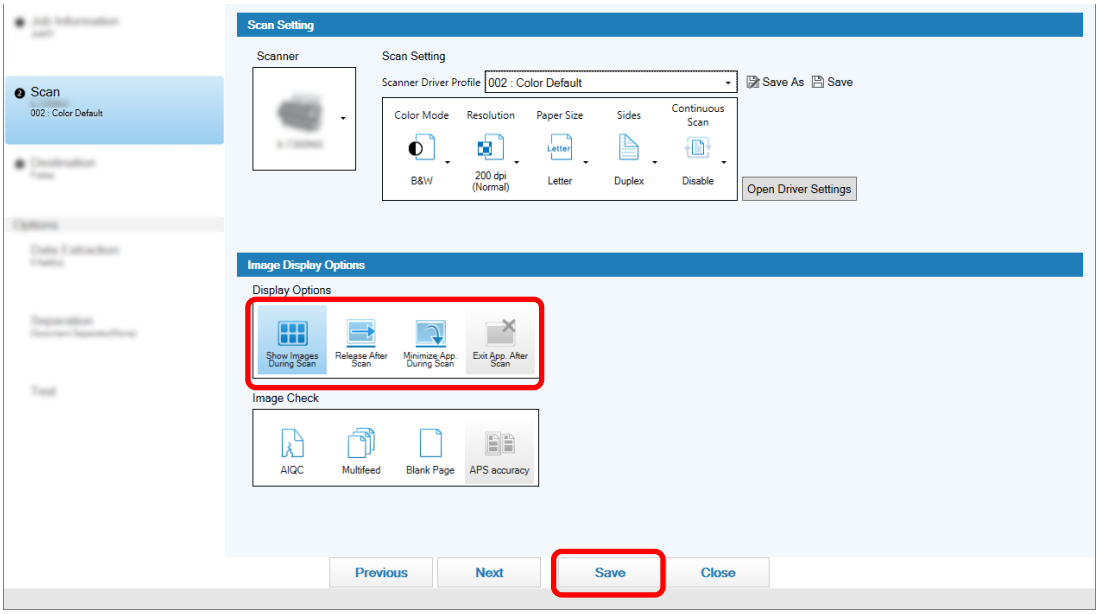
  If you select the [Save images without showing a preview] check box in the [Scan] tab, scanned images will be automatically output to the destination specified in [File Property] under the [Destination] tab without showing the scanned images.
  Clear this check box to show scanned images once the scan starts. Click the [Finish] button in the window for checking the scanned images to save them to files.



- For the advanced setup

  a Click the option you want to set for [Display Options] under [Image Display Options] in the [Scan] tab.

b Click the [Save] button.



Options	Operation Details
Show Images During Scan	This is the default setting. Shows scanned images once the scan starts. Click the [Finish] button in the window for checking the scanned images to save them to files.
Release After Scan	Saves scanned images to files without clicking of the [Finish] button by an user.
Minimize App. During Scan	Minimizes the window for checking scanned images after a scan starts.
Enable Separate QC	For PaperStream Capture Pro, this option is available. When you select this option, you can perform a scan and a QC (quality check) individually.
Release After Scan Minimize App. During Scan Exit App. After Scan	Minimizes the window for checking the scanned images during a scan, saves the scanned images to files, then exits PaperStream Capture. If you select these three options and combine them with the setting to scan documents by pressing the button on a scanner, scanned images are saved to files and PaperStream Capture is closed without showing the PaperStream Capture window on the computer.

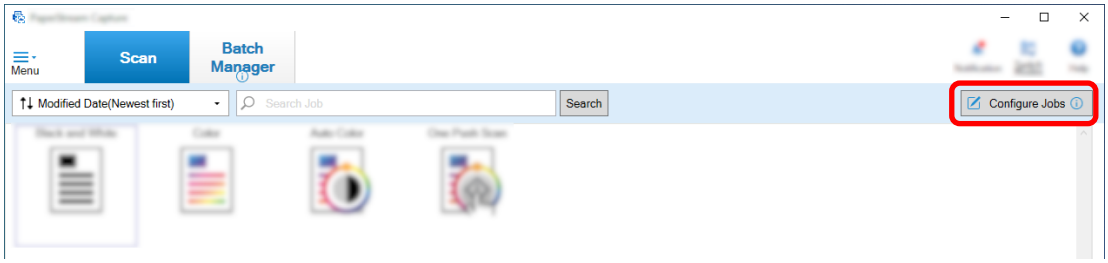
Specifying the Image File Size

You can adjust the file size when outputting the scanned images in PDF, JPEG, or TIFF format.
For JPEG or TIFF images, you can adjust the file size only when the color mode is [Gray] or [Color].

Specifying the File Size on PaperStream Capture

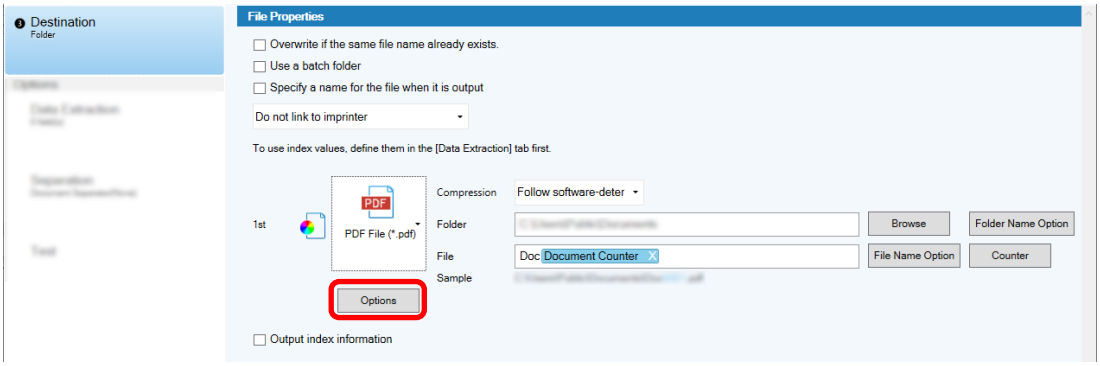
You can change the file size in the [Options] window which is displayed on the [Destination] tab on PaperStream Capture.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

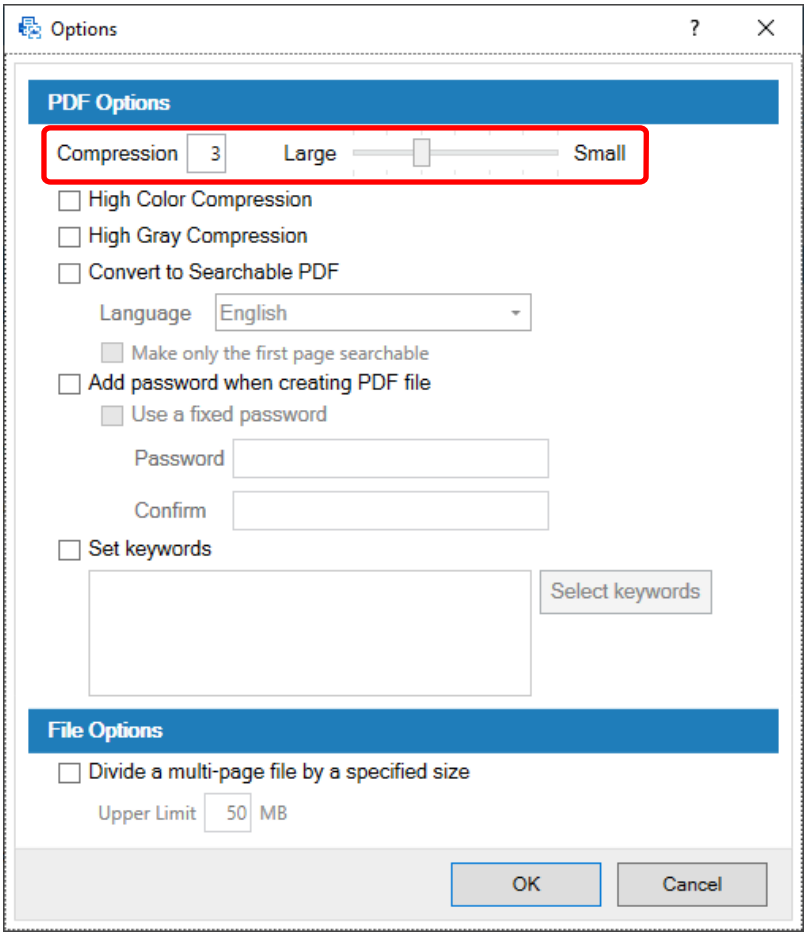


2 Select an existing job and click the [Edit] button on the toolbar.

3 Select the [Destination] tab and click the [Options] button in [File Properties].



You can reduce the file size. However, the smaller the file size, the more noticeable the image degradation.



4 Click the [OK] button.

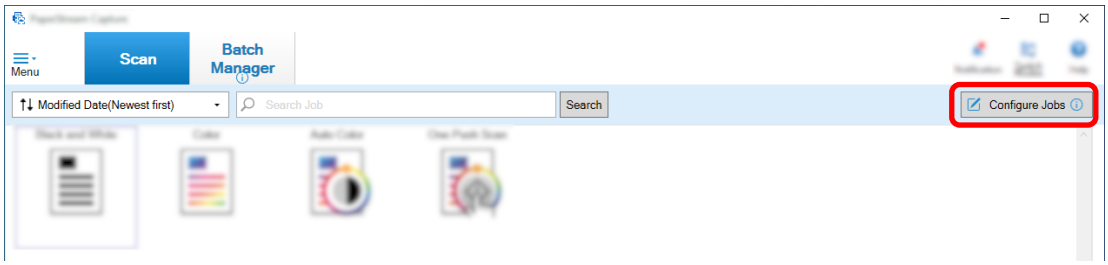
The [Destination] tab on PaperStream Capture is displayed at the forefront.

Making Images into Searchable PDF Files

This section describes how to create searchable PDF files when "PDF" is selected as an image file format.

Configuring in the Easy Setup

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

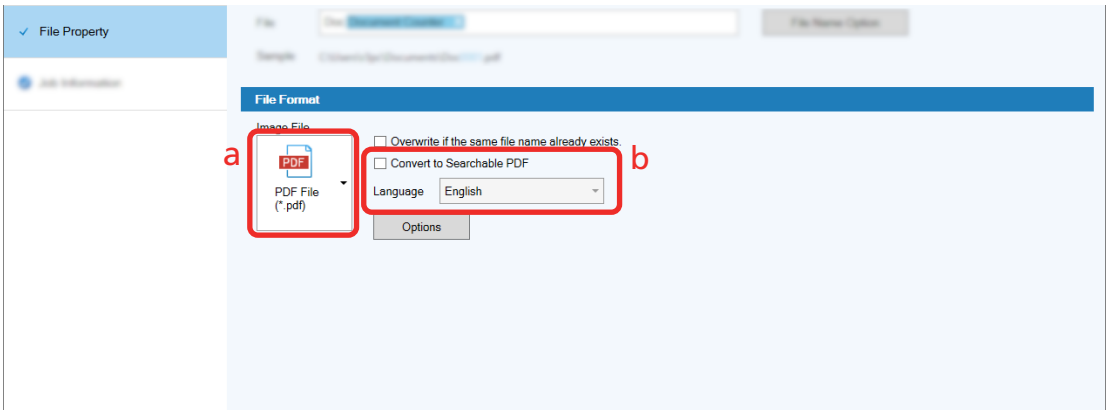


2 Select an existing job and click the [Edit] button on the toolbar.

3 Select the [Destination] tab.

a Select "PDF" for the file format.

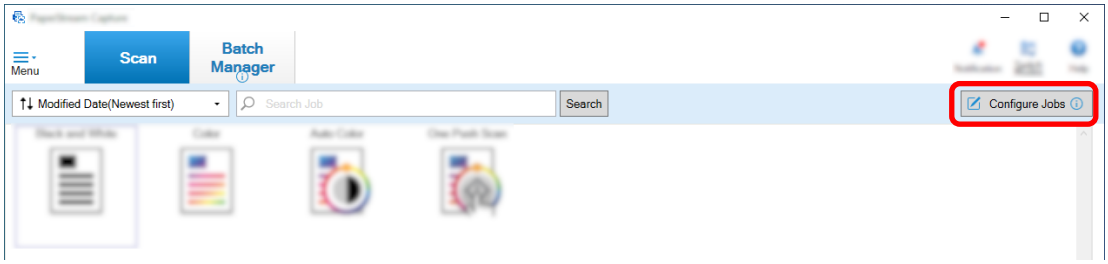
b Select the [Convert to Searchable PDF] check box and select a language.



4 Click the [Save] button.

Configuring in the Advanced Setup

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

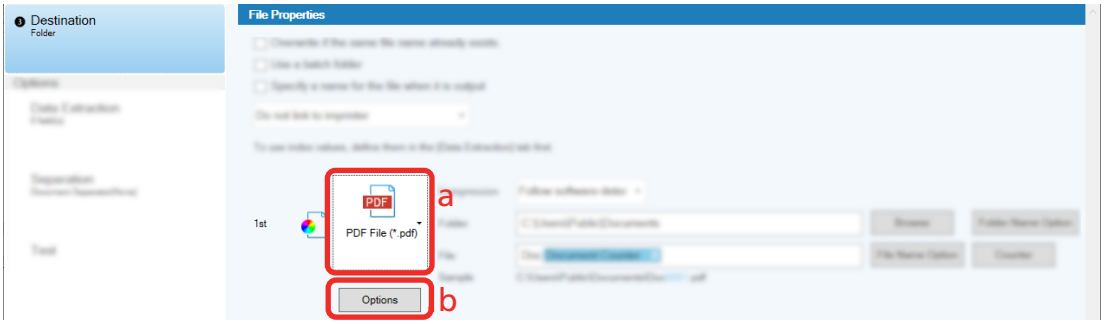


2 Select an existing job and click the [Edit] button on the toolbar.

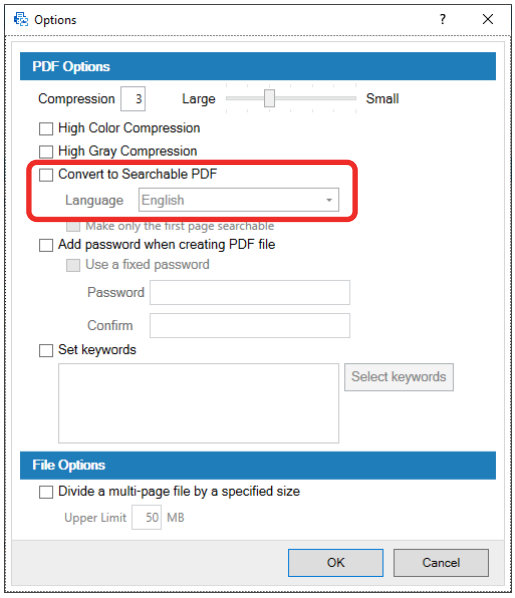
3 Select the [Destination] tab.

a **Select "PDF" for the file format.**

b **Click the [Options] button.**

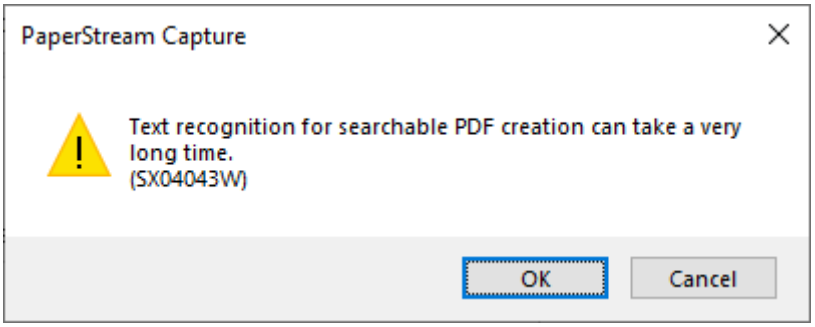


4 **Select the [Convert to Searchable PDF] check box and select a language.**



5 **Click the [OK] button.**

After a following message is displayed, click the [OK] button.

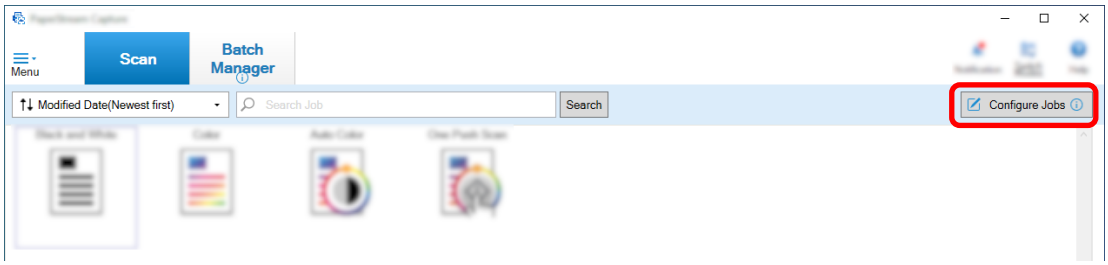


Adding Sequential Numbers to Image File Names

Adding the sequential numbers specified in [Counter Options] to the file name definition specified using the [File Name Option] button prevents duplicate file names.

This section describes how to define sequential numbers in [Counter Options].

1 On the main PaperStream Capture window, click the [Configure Jobs] button.



2 Select an existing job and click the [Edit] button on the toolbar.

3 Open the [Counter Options] window.

- For the easy setup

  a Select [File Property] under the [Destination] tab and click the [File Name Option] button.

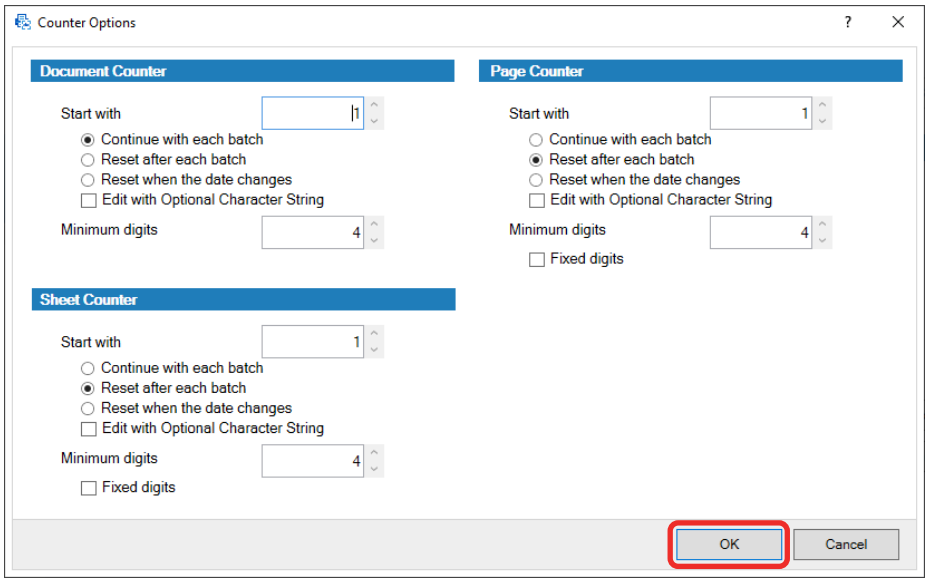
  b Click the [Counter Options] button on the [File Name Option] window.

- For the advanced setup
  Select the [Destination] tab and click the [Counter Options] button.

4 Consider how to use counters to define file names.

- Any Character String + (Sheet Counter) + Page Counter
  This definition is often used when the following file formats are selected:
  - Windows Bitmap
  - Tagged Image File Format
  - JPEG2000 File
  - JPEG File
  - SinglePage PDF File
  - SinglePage PDF/A File
  - Portable Network Graphics
- Any Character String + Document Counter
  This definition is often used when the following file formats are selected:
  - MultiPage Tagged Image File Format
  - PDF File
  - PDF/A File
  - Rich text format
  - Word file
  - Excel file
  - PowerPoint file

5 Configure the counter items you want to use and click the [OK] button.



The [Destination] tab on PaperStream Capture is displayed at the forefront.

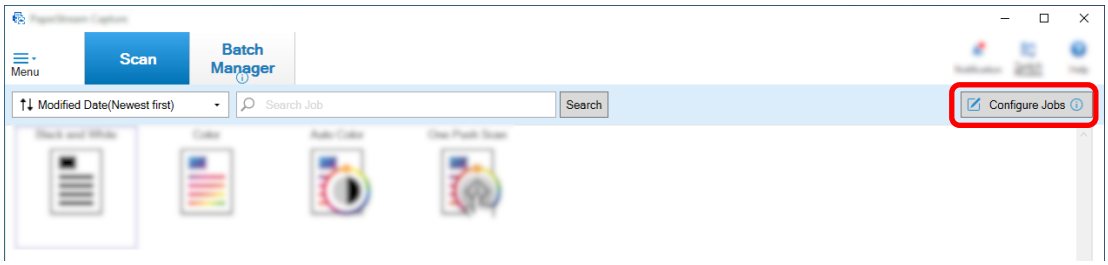
6 Click the [Save] button.

Extracting Barcode Information From Scanned Documents

A barcode can be scanned from a scanned image to use the information in the barcode as a file name or folder name or output the barcode as index information.
This section describes how to scan the barcode information in the advanced setup.

1 Prepare a document on which the barcodes to be detected are printed.

2 On the main PaperStream Capture window, click the [Configure Jobs] button.



3 Select an existing job and click the [Edit] button on the toolbar.

4 Select the [Data Extraction] tab and click the [Add] button.

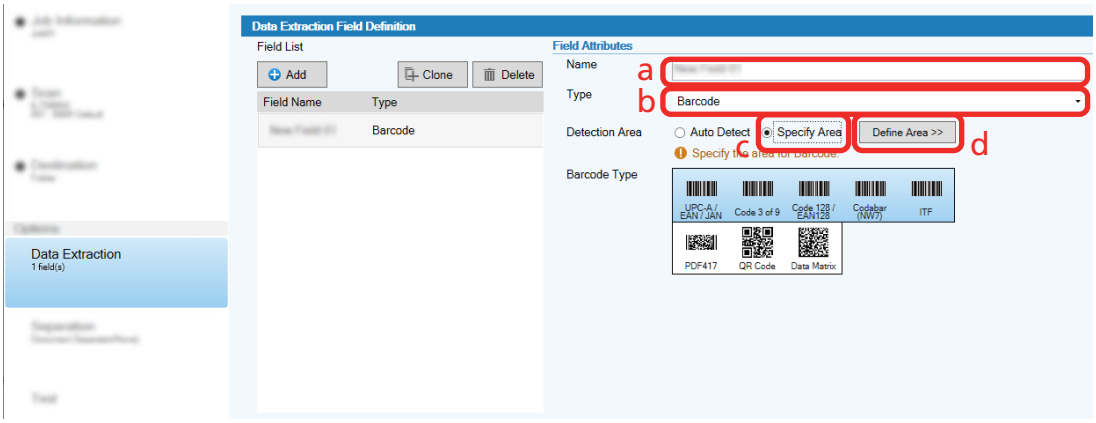
5 Set the field attributes.

a Enter a name for [Name].

b Select [Barcode] for [Type].

c **Select [Specify Area] for [Detection Area].**

d **Click the [Define Area >>] button.**



6 **Load a document in the scanner and click the [Scan] button.**

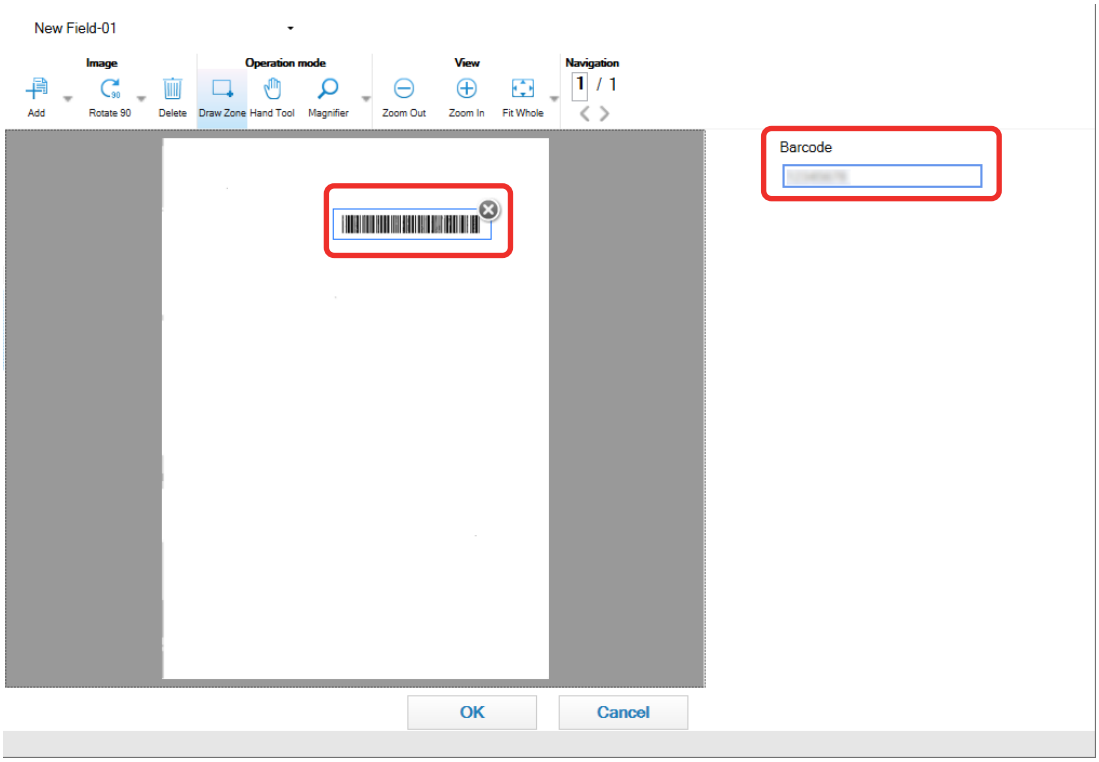
The scanned image appears.

7 **Set the area to scan a barcode.**

Select the range in which the barcode is scanned by clicking and holding down the left button on the mouse.

Click "X" on the selected frame to delete the frame and change the selected range.

When the barcode is recognized, the recognition result is displayed in the field panel.



8 **Click the [OK] button.**

The [Data Extraction] tab window on PaperStream Capture is displayed at the forefront.

9 **Click the [Save] button.**

10 **Click the [Close] button to close the window for setting a job.**

11 **Click the [Back to Home] button.**

12 **Scan a document.**
Scanning Documents (page 22)

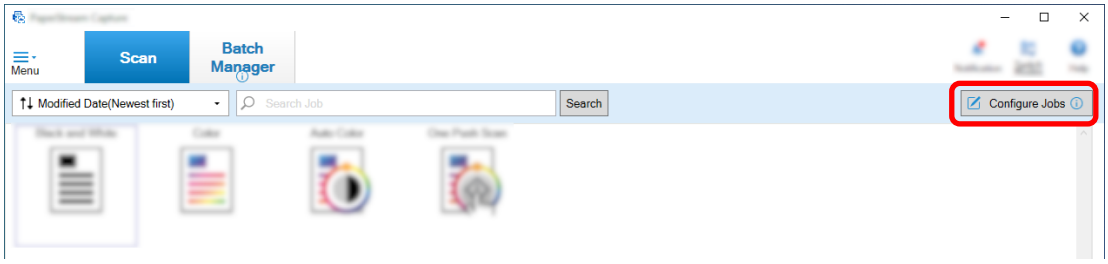
13 **Check the scanned image.**
In the [Scan] window (for checking/editing), check the scanned images and the barcode recognition result.
If necessary, you can edit the extracted data, or suspend the checking process and save the scanned image temporarily.

Extracting Text Information From Scanned Documents

With the Zonal OCR function, you can perform OCR on a specified area of a document and use the recognized character string as a file or folder name or output the string as index information.
This section explains the procedure to scan text information.

1 **Prepare a document printed in a language to be used for Zonal OCR.**

2 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



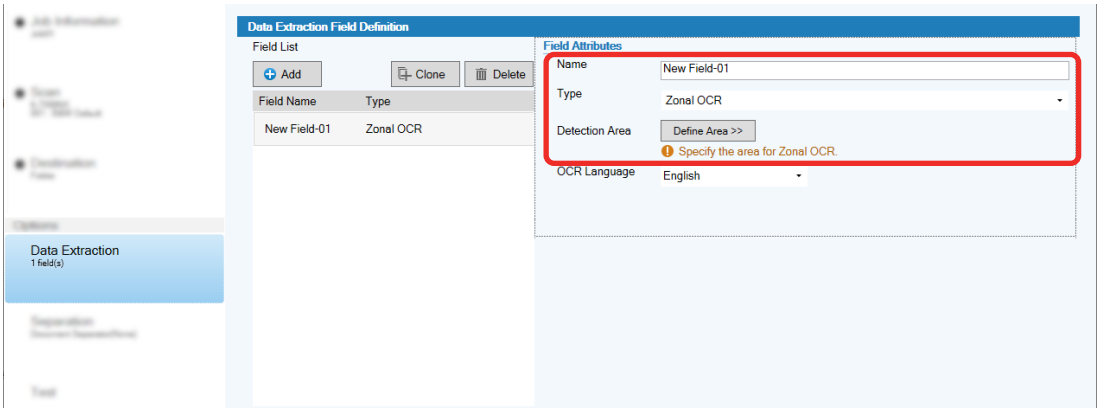
3 **Open the [Data Extraction] tab for the job you want to use.**

4 **Click [Add] in [Field List].**

5 **In [Type] in [Field Attributes], select [Zonal OCR].**

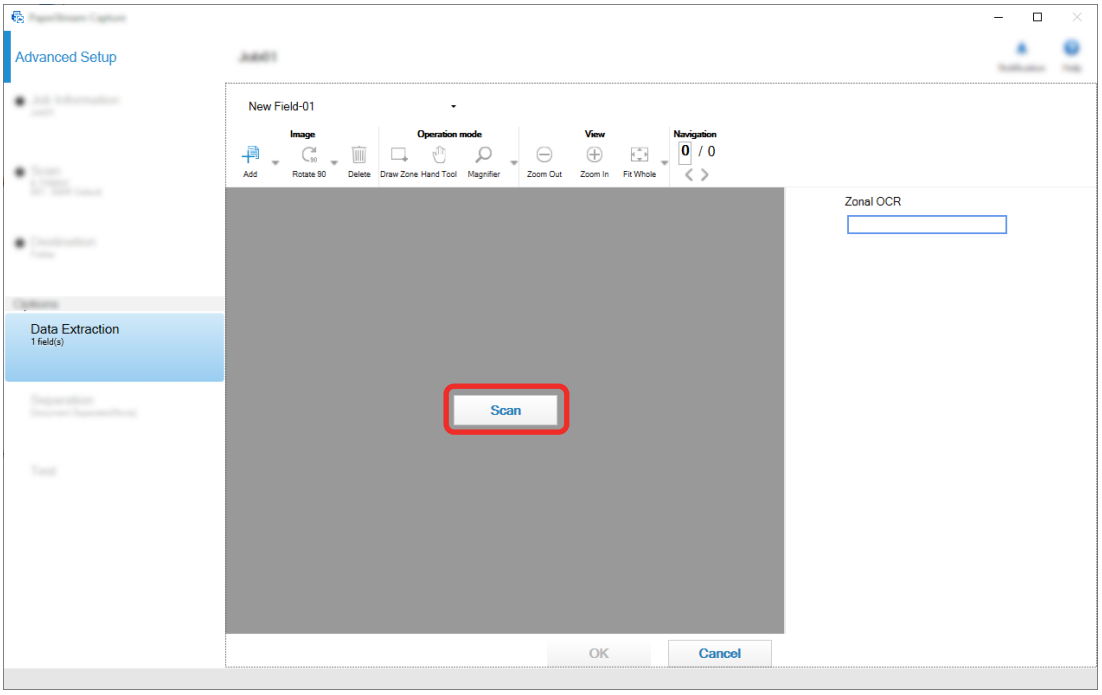
6 **Select a language to be used from the [OCR Language] drop-down list.**

7 **Click the [Define Area >>] button.**



8 **Load a document prepared in step 1 in the scanner.**

9 **Click [Scan].**

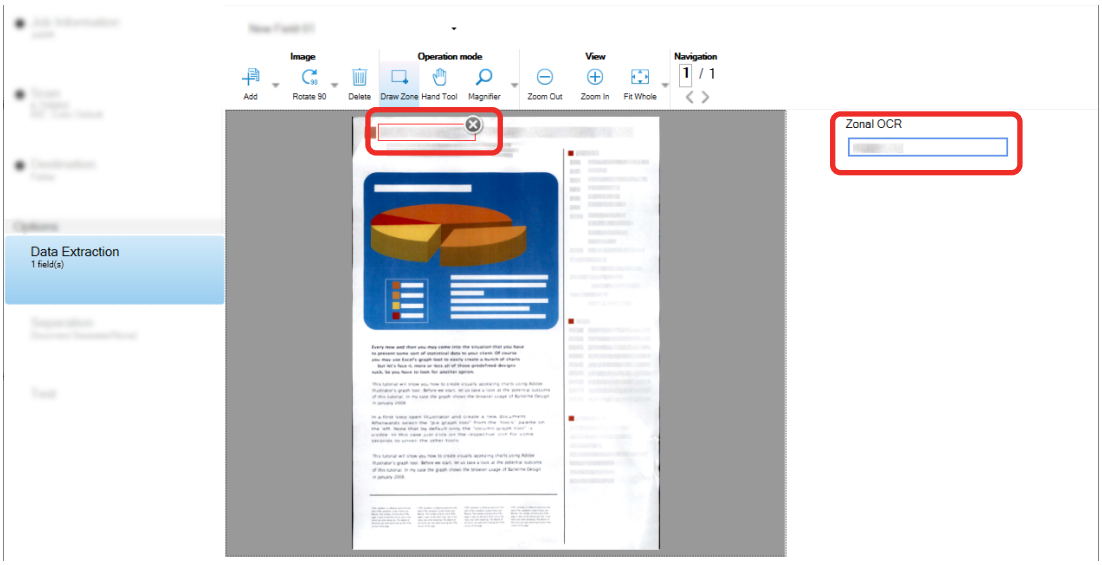


10 **On the scanned image, drag to select an area with text to be recognized by using Zonal OCR.**

The result of Zonal OCR recognition for the selected area is displayed in the field panel.
Only one area can be selected. Select an area with enough space.

Clicking the cancel button ( ) next to the selected area clears the selection.

The selected area is displayed in a red frame.



For PaperStream Capture Pro, if English, French, German, Italian, Spanish, Russian, Turkish, Greek, Portuguese, Swedish, Dutch, Polish, Czech, Romanian, Ukrainian, or Indonesian is specified for [OCR Language] in step 6, the entry area for specifying the type of character to be recognized and the number of characters is displayed. Select a type from the drop-down list and enter the number of characters if needed.

To exit the editing mode for the recognition area, click [Draw Zone] in the [Edit] section on the toolbar.

11 Check that the barcode is recognized correctly, and click [OK].

12 Click the [Save] button to save the settings.

13 Click the [Close] button to close the window for setting a job.

14 Click the [Back to Home] button.

15 Scan a document stack.

For details, refer to Scanning Documents (page 22).

16 Check the scanned images.

In the [Scan] window (for checking/editing), check the scanned images and the Zonal OCR results. If necessary, you can edit the extracted data, or suspend the checking process and save the scanned images temporarily.

HINT

- You can edit the recognition area by pressing and holding down the left button on the mouse while the mouse pointer is in the viewer.

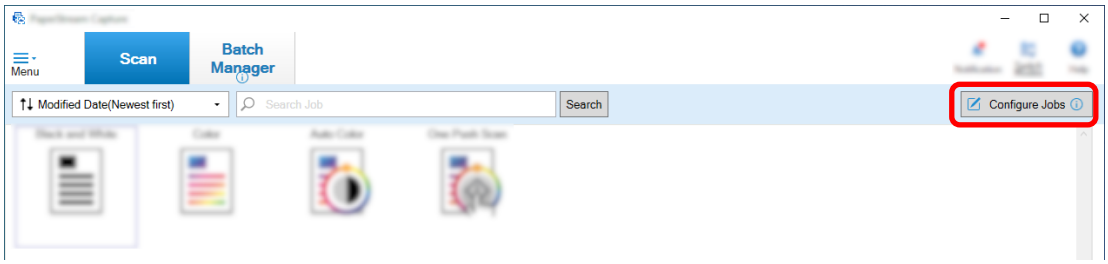
  To exit the editing mode for the recognition area, perform one of the following operations:

  - Clicking [Draw Zone] in the [Edit] section on the toolbar.
  - Right-clicking the mouse while the mouse pointer is in the viewer.

Outputting Text and Barcode Information on Scanned Documents to Index Files

Data (such as text or barcode information) extracted in Extracting Barcode Information From Scanned Documents (page 55) and Extracting Text Information From Scanned Documents (page 57) can be output to index files.
This section describes the procedure to select the items you want to output to index files then output the index files using the advanced setup.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

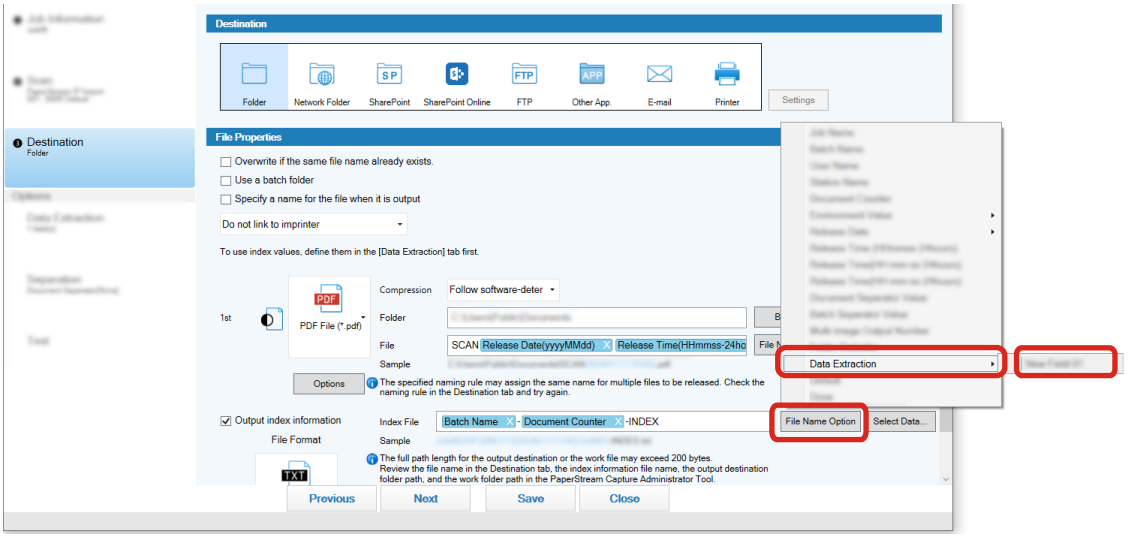


2 Select an existing job and click the [Edit] button on the toolbar.

3 Select the [Destination] tab and select the [Output index information] check box.

4 In [File Format], select a file format for index information files.

5 Click the [File Name Option] button for [Index File] and select a field name from [Extracted Data].



6 Specify items that are to be output to index files.

a Select the [Select Data] button for [Index File].

The [Index List Options] window appears.

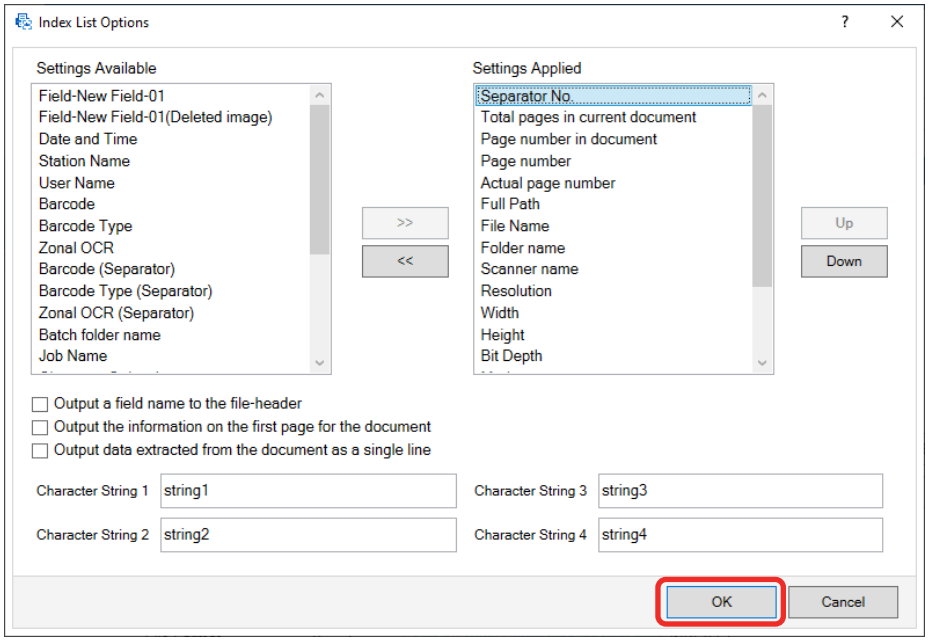
b Select any unnecessary items in [Settings Applied] and click the [<<] button to move them to [Settings Available].

c Select the necessary items in [Settings Available] and click the [>>] button to move them to [Settings Applied].

d Select an item and click the [Up] or [Down] button to set the order in which to output the item to index files.

e If you have specified [TXT] or [CSV] for the file format setting of the index information file and want to output the item names, select the [Output a field name to the file-header] check box.

f Click the [OK] button.



The [Destination] tab on PaperStream Capture is displayed at the forefront.

7 Select [One file per document] or [One file per batch] as the unit in which an index information file is output.

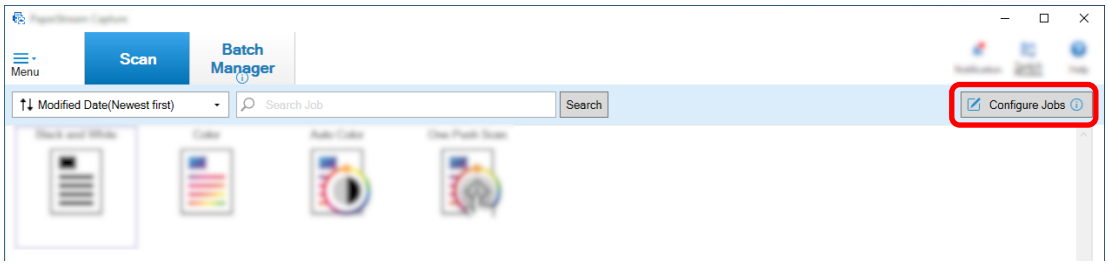
8 Click the [Save] button.

The job settings are saved.

Using Barcode Information on Scanned Documents for File Names and Folder Names

This section explains the procedure to use the recognition results of the barcodes scanned in Extracting Barcode Information From Scanned Documents (page 55) for file names and folder names.

1 On the main PaperStream Capture window, click the [Configure Jobs] button.

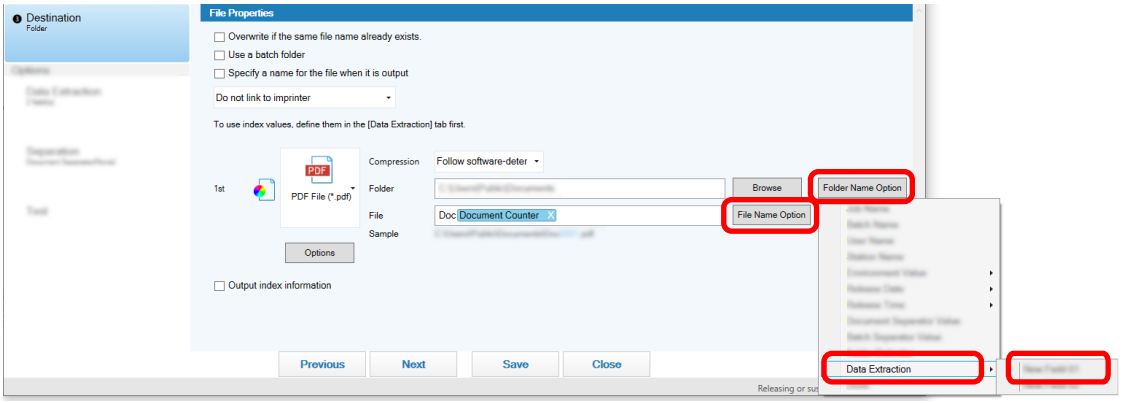


2 Select an existing job and click the [Edit] button on the toolbar.

3 Select the [Destination] tab.

4 Click the [Folder Name Option] button or [File Name Option] button in [File Properties].

5 On the displayed menu, click [Extracted Data] and select the name of the field you want to use.



The item is displayed in tag format in the input field for [Folder] or [File].

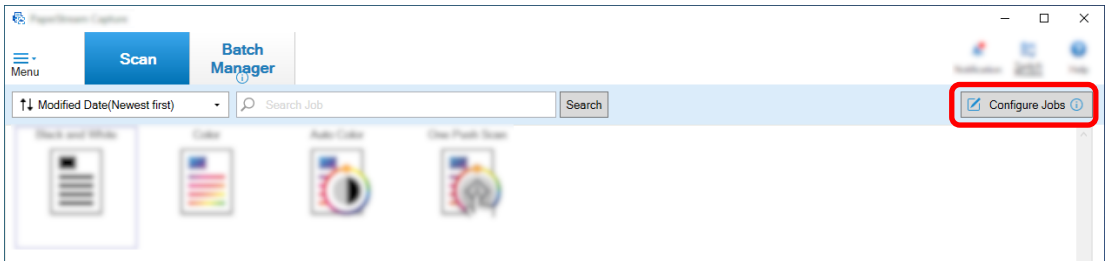
6 Click the [Save] button.

The job settings are saved.

Using the Text on Scanned Documents for File Names and Folder Names

This section explains the procedure to use the recognition results of Zonal OCR for file names and folder names.

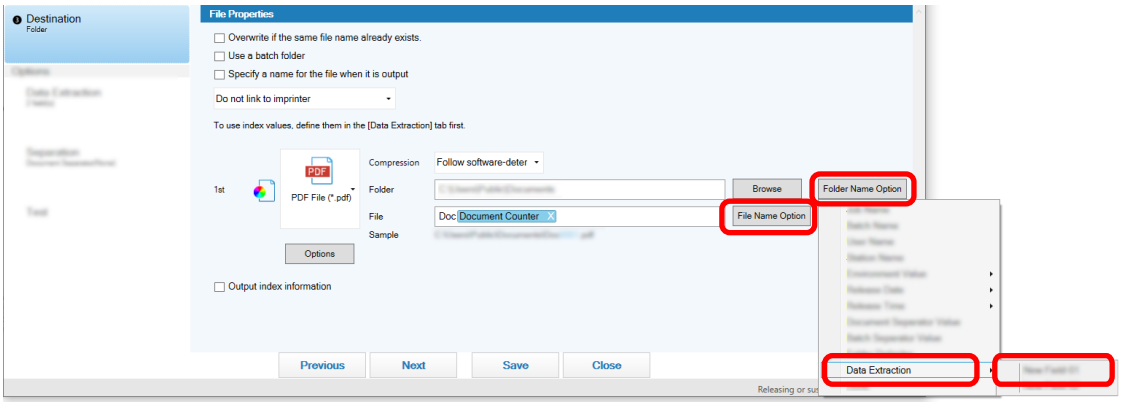
1 On the main PaperStream Capture window, click the [Configure Jobs] button.



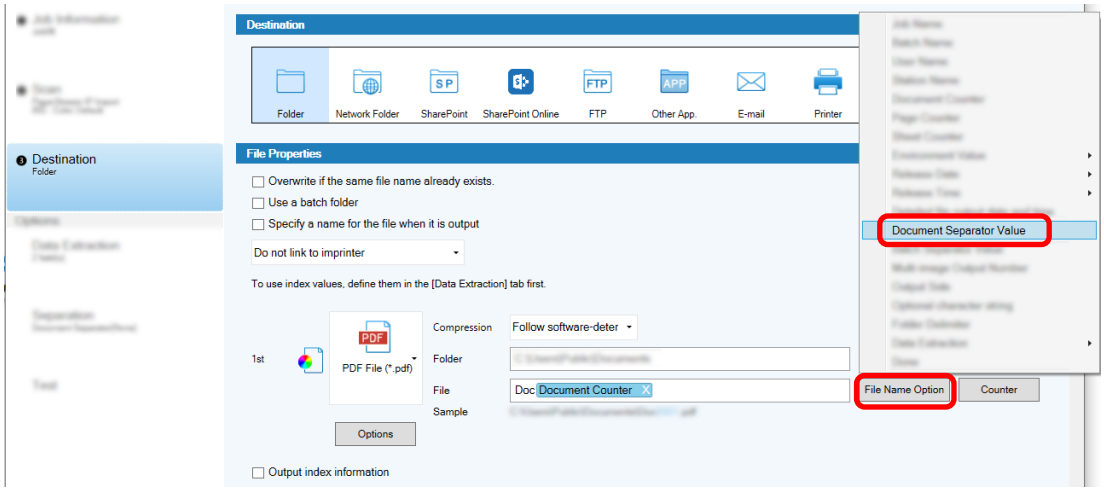
2 Open the [Data Extraction] for the job to be used, and configure the Zonal OCR function.
When you use Zonal OCR to divide a document stack and you want to specify file names using the recognition result, refer to Automatically Separating Images Using Character Strings in Scanned Documents (page 64) and perform the procedure up to the saving of the settings.

3 Open the [Destination] tab.

4 Click the [Folder Name Option] button or [File Name Option] button in [File Properties].
On the displayed menu, click [Extracted Data] and select the name of the field you want to use.



When you use Zonal OCR to divide a document stack and you want to specify file names using the recognition result, click the [File Name Option] button next to the input field for a file name, select [Document Separator Value].



5 **Click the [Save] button to save the settings.**

6 **Click the [Close] button to close the window for setting a job.**

7 **Click the [Back to Home] button.**

8 **Scan documents.**
Scanning Documents (page 22)

9 **Check the scanned images.**
In the [Scan] window (for checking/editing), check the scanned images and the Zonal OCR results. If necessary, you can edit the extracted data, or suspend the checking process and save the scanned images temporarily.

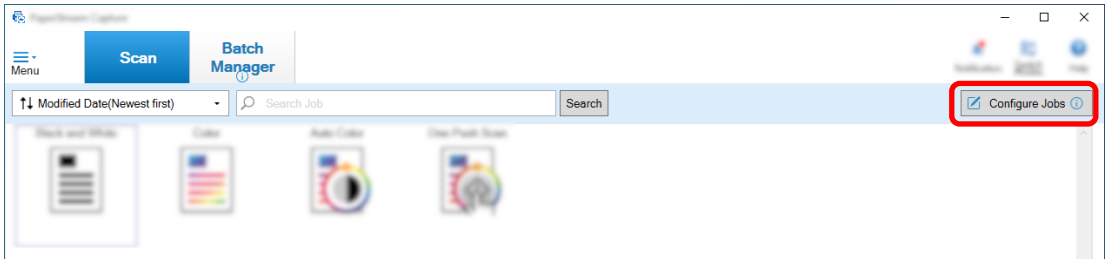
ATTENTION

- If you perform scanning by using the same job, the file name may be duplicated. You can configure the following settings for the file not to be overwritten:
  - Selecting the [Continue with each batch] check box for [Page Counter] in the [Counter Options] window that is displayed when the [Counter] button is clicked
  - Setting the output folder naming option to change the output folder for each scanning

Automatically Separating Images Using Character Strings in Scanned Documents

You can use the recognition results of Zonal OCR to split images created from consecutively scanned documents into multiple files.
This section describes the procedure in the advanced setup using the character strings of Zonal OCR results to split images into multiple files and sort the files by character string into destination folders.

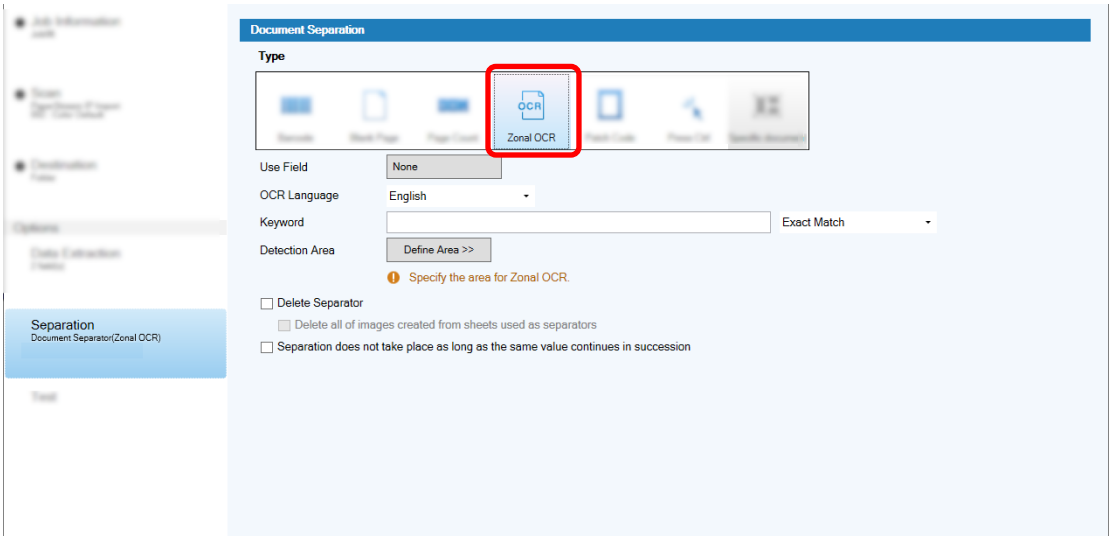
1 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



2 **Select an existing job and click the [Edit] button on the toolbar.**

3 **Select the [Separation] tab.**

4 Select [Zonal OCR] for [Type].

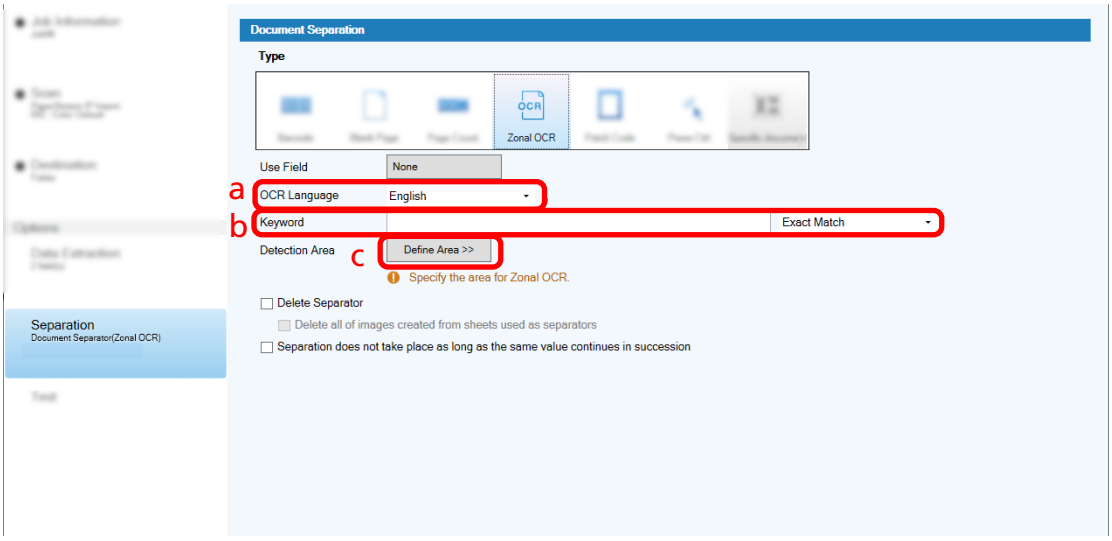


5 Specify the following settings for [Detect Doc Separator].

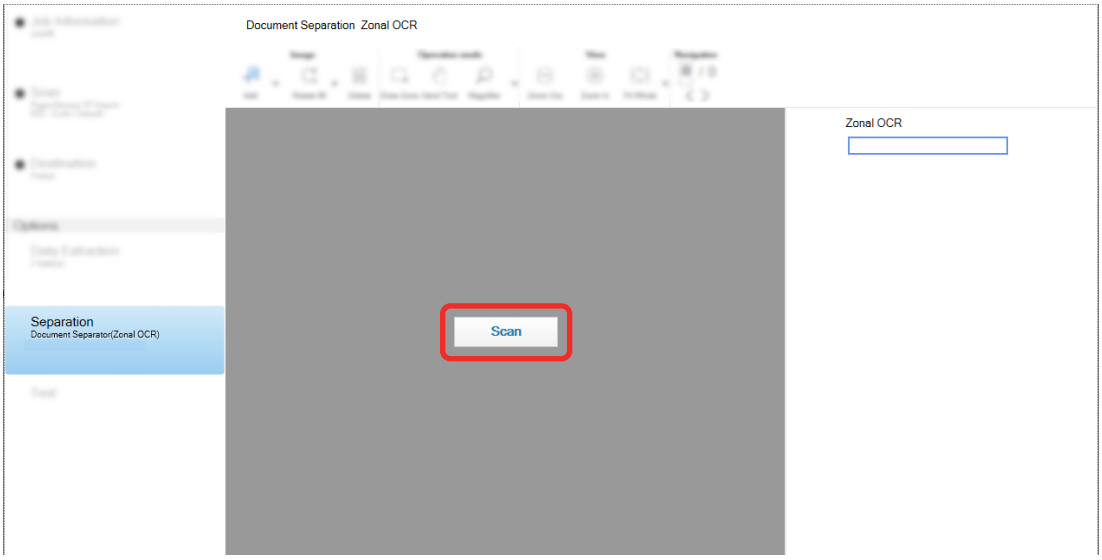
a Select a language to be used from the [OCR Language] drop-down list.

b Enter characters to be recognized in the input field for [Keyword], and select a condition in which characters will be recognized from the drop-down list next to the input field.

c Click the [Define Area >>] button.



d Load a document in the scanner and click [Scan].

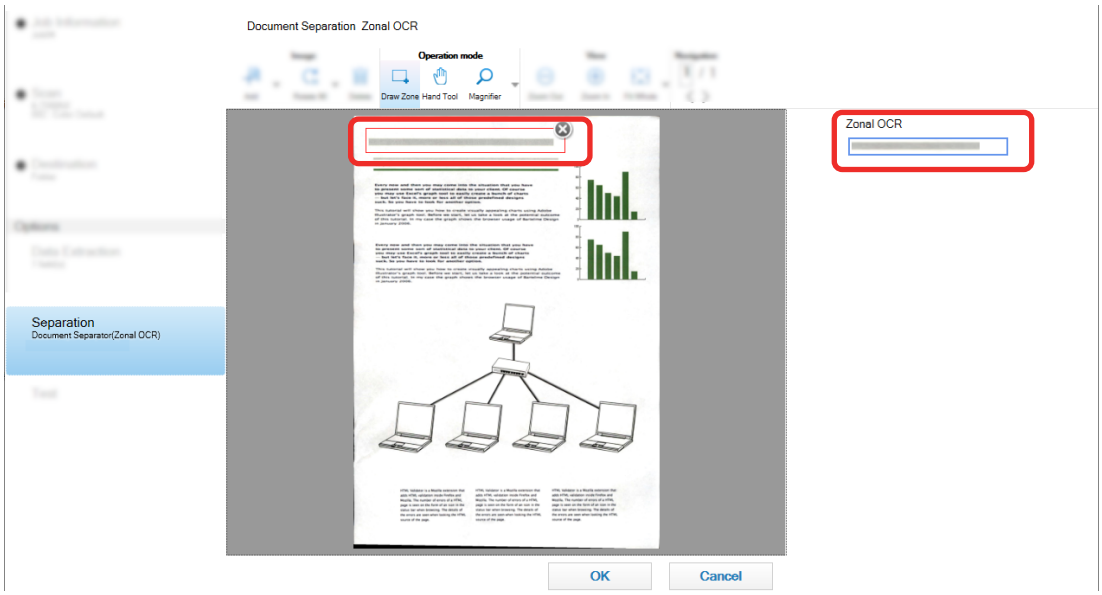


e On the scanned image, drag to select an area with text to be recognized by using Zonal OCR.

Only one area can be selected. Select an area with enough space.

Clicking the cancel button ( ) next to the selected area clears the selection.

The selected area is displayed in a red frame.



The result of Zonal OCR recognition for the selected area is displayed in the field panel.

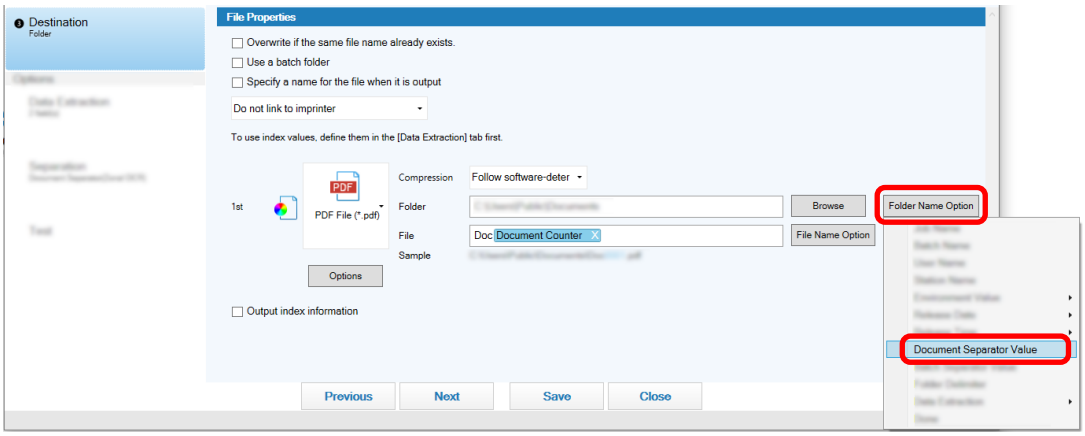
f Check that the barcode is recognized correctly, and click [OK].

6 Click the [Destination] tab.

7 In [Destination], specify a destination for outputting scanned images.

8 **Click the [Folder Name Option] button or [File Name Option] button in [File Properties].**

9 **From the displayed menu, select [Document Separator Value].**



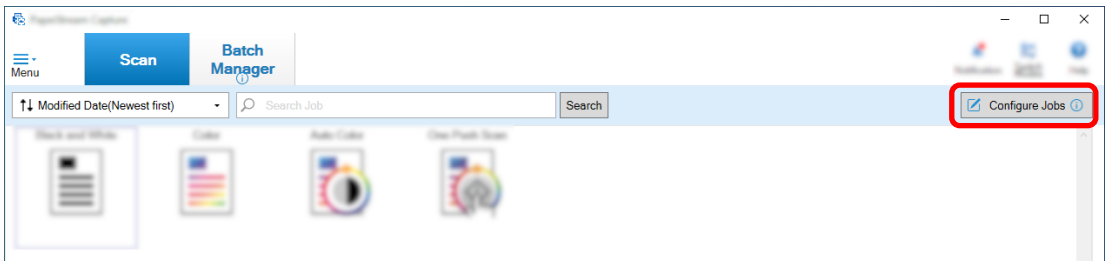
The selected item is added in a tag format to the input field for [Folder] or [File].

10 **Click the [Save] button.**
The job settings are saved.

Automatically Separating Images Using Barcodes

You can use barcodes to split images created from the consecutively scanned documents into multiple files. This section describes the procedure in the advanced setup for using barcodes as separators to split images into multiple files and sort the files by barcode into destination folders.

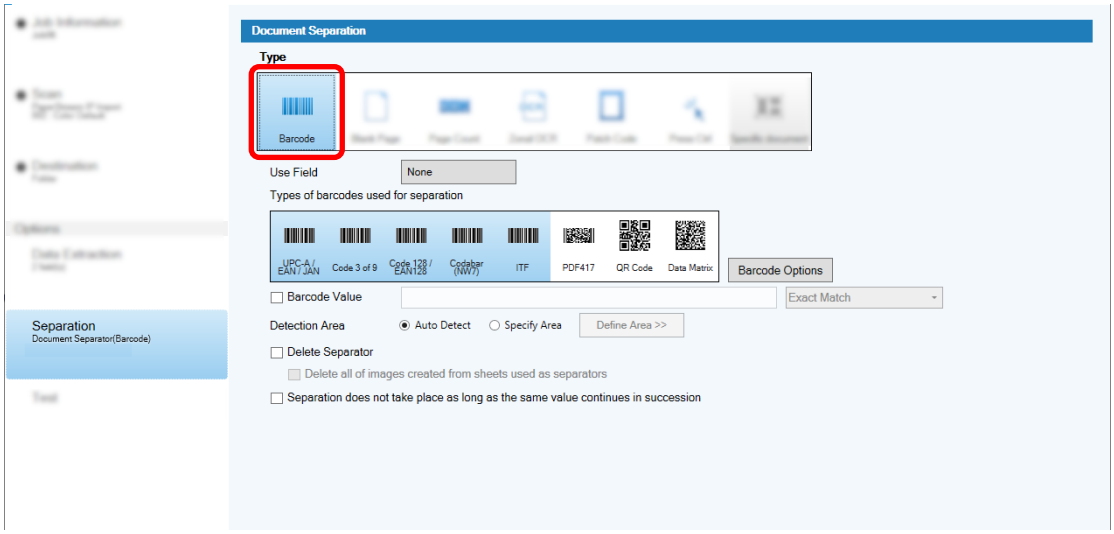
1 **On the main PaperStream Capture window, click the [Configure Jobs] button.**



2 **Select an existing job and click the [Edit] button on the toolbar.**

3 **Select the [Separation] tab.**

4 Select [Barcode] for [Type].



5 Select one or more barcode types to be detected from [Types of barcodes used for separation].

6 Select [Specify Area] and click the [Define Area >>] button.

The window for setting recognition areas appears.

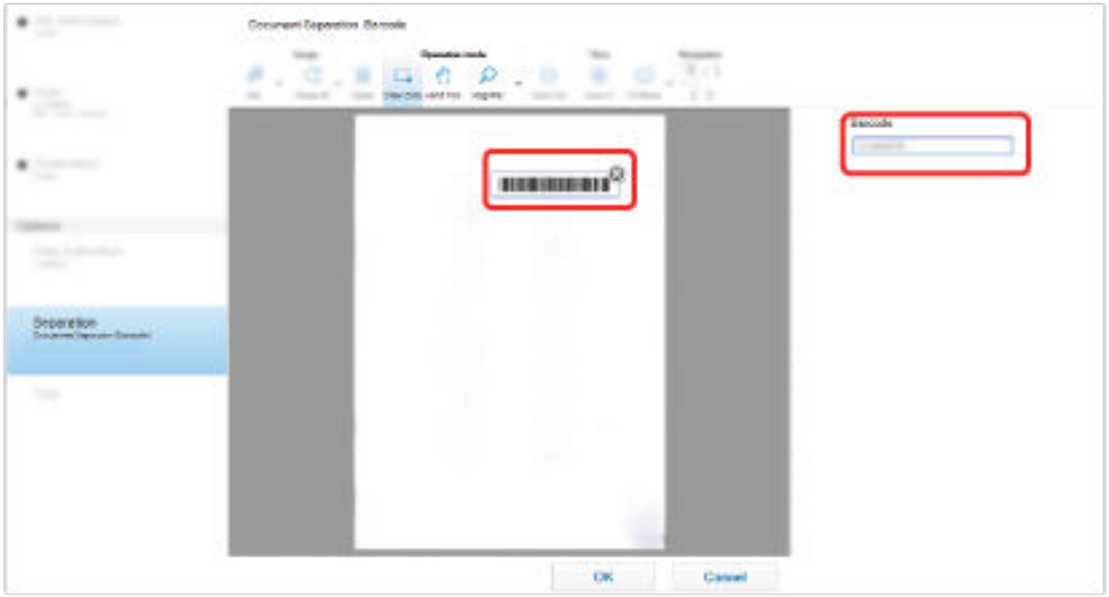
7 Load a document in the scanner and click [Scan].

8 On the scanned image, click and drag to select an area to detect a barcode.

Only one area can be selected. Select an area with enough space.

Clicking the cancel button ( ) next to the selected area clears the selection.

The selected area is displayed in a blue frame.



The result of barcode recognition for the selected area is displayed in the field panel.

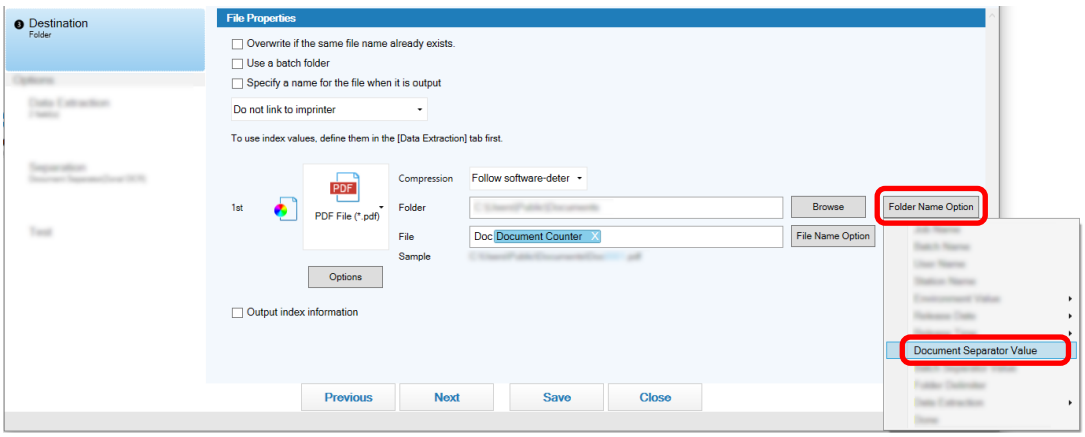
9 **Check that the barcode is recognized correctly, and click [OK].**

10 **Click the [Destination] tab.**

11 **In [Destination], specify a destination for outputting scanned images.**

12 **In [File Properties], click the [Folder Name Option] button.**

13 **From the displayed menu, select [Document Separator Value].**



14 **Click the [Save] button.**

The job settings are saved.

Exporting/Importing an Operational Environment

This section explains exporting and importing an operational environment for PaperStream Capture.
When you use PaperStream Capture on more than one computer, you can build the same operational environment easily by exporting a created job with the [Exporter] tool, and importing it to PaperStream Capture on other computers with the [Importer] tool.
Also, you can import a profile which is exported from ScandAll Pro, as a job of PaperStream Capture.

Exporting an Operational Environment

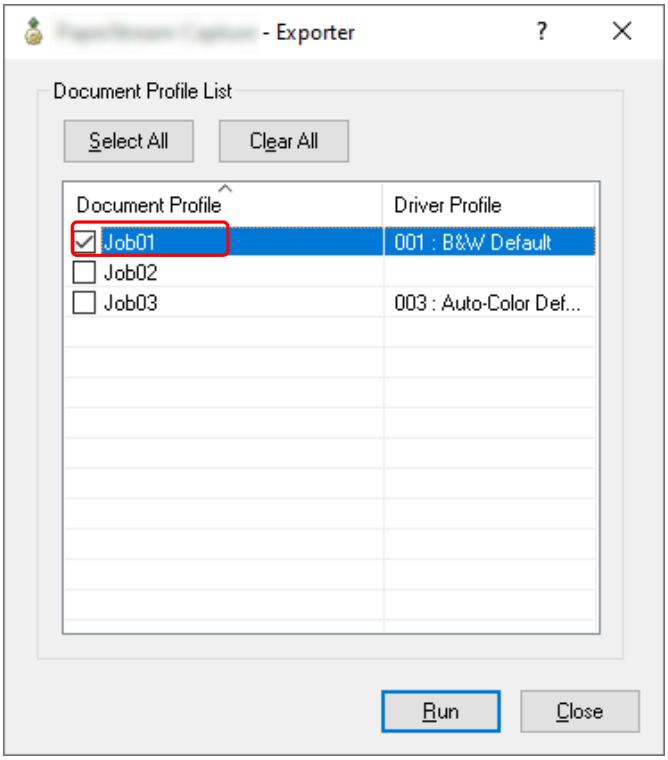
Export an operational environment including jobs, PaperStream IP driver profiles and so on that were created with PaperStream Capture.

1 Display the [Exporter] window.

- Windows 10/Windows Server 2016/Windows Server 2019/Windows Server 2022
  Select [Start] menu → [PaperStream Capture] → [Exporter].
- Windows 11
  Select [Start] menu → [All apps] → [PaperStream Capture] → [Exporter].

A list of jobs that are registered with PaperStream Capture is displayed.

2 Select the check boxes for the jobs to be exported.



3 Click the [Run] button.

The [Save as] window appears.

4 **Specify the location to save the exported file and the file name, and then click the [Save] button.**

The operational environment for PaperStream Capture is exported, and then a message indicating the completion of exporting process is displayed.
The exported file is created with a ".dpav" extension.

5 **Click the [OK] button.**

The operational environment is exported.

HINT

- The exported file can be used as a backup of the operational environment.
- Sample jobs are not exported.

Importing an Operational Environment to a Different Computer

Import the operational environment for PaperStream Capture or PaperStream Capture Pro which was exported in Exporting an Operational Environment (page 71) or import the profile which was exported from ScandAll PRO.

ATTENTION

- For PaperStream Capture Pro, an operational environment can be imported when one of the following is selected for [Storage Server] in the [Station] tab.
  - Single station operation. No storage server used.
  - Multi-station operation. This is the storage server.
- Administrator privileges are required to import an operational environment.
  Furthermore, users without administrator privileges cannot import an operational environment even if they select "Run as administrator".
- The version of PaperStream Capture and PaperStream IP on the import-side computer must be the same version or a version later than the version used on the export-side computer.

1 **Backup the operational environment before importing another operational environment to the computer.**
For details, refer to Exporting an Operational Environment (page 71).

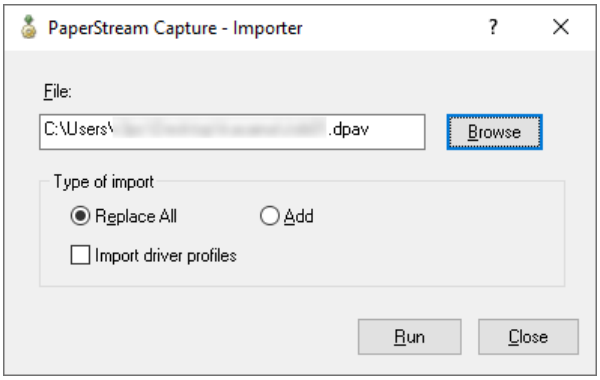
2 **Display the [Importer] window.**

- Windows 10/Windows Server 2016/Windows Server 2019/Windows Server 2022
  Select [Start] menu → [PaperStream Capture] → [Importer].
- Windows 11
  Select [Start] menu → [All apps] → [PaperStream Capture] → [Importer].

3 **Specify the file to be imported.**

Specify the file (.dpav (.cab for the previous format)) that was exported in "Exporting an Operational Environment (page 71)" or the file (.cab) that was exported with ScandAll PRO.
To specify an archived file, use one of the following methods:

- Entering a file path using up to 255-byte characters
- Clicking the [Browse] button
- Dragging and dropping the file



4 Select an import method.

The following import methods are available:

- Replace All
  Deletes all jobs currently registered with PaperStream Capture or PaperStream Capture Pro, and replaces them with jobs in the archived file.
  When this is selected, the [Import driver profiles] check box is displayed.
  Select this check box to import the profile for the PaperStream IP driver as well. When the driver profile is imported, the existing driver profile in the destination will be overwritten.
- Add
  Adds the job of the archived file to PaperStream Capture or PaperStream Capture Pro.
  In this case, the PaperStream IP driver profile is not imported.

5 Click the [Run] button.

Importing process completed message is displayed.

6 Click the [OK] button.

The operational environment is imported.

ATTENTION

- Import the exported PaperStream Capture or PaperStream Capture Pro operational environment to the same language environment. The exported operational environment cannot be imported to the different language environment from the exported system.
- Exported files in the latest version of PaperStream Capture or PaperStream Capture Pro cannot be imported to earlier versions of PaperStream Capture or PaperStream Capture Pro.
- If a driver other than the PaperStream IP (TWAIN) driver is used for ScandAll PRO, the settings for the driver are not imported along with a profile when a profile is imported.

When a job is imported, the settings for the PaperStream IP driver are applied as "Current Setting". Therefore, configure the driver settings again.
If you configure the driver settings again, the file format may be changed. Make sure that the same file format as the one specified for the operational environment from which the job was imported is specified in [File Properties] in the [Destination] tab.

- The functions and the operational environment that can only be specified in a ScandAll PRO profile are not imported.

HINT

- If the file to be imported has a ".dpav" extension, double-clicking the file displays the [Importer] window. In this case, follow the procedure from step 3.
- If you select [Add], if an event is set in the exported operational environment, the event is also set in the imported operational environment. (Events can be viewed in [Event] in the [Usability] tab.)
- If a batch job that is suspended or aborted is displayed in the [Batch Manager] window, [Replace All] cannot be selected.
  Release or delete the batch, and then import the operational environment again.
  For PaperStream Capture Pro, if you click the [No] button on the message window that appears when PaperStream Capture Pro is uninstalled while a suspended or aborted batch job exists, files remain in the folder that is specified for [Storage Folder] under [Storage Server] in the [Station] tab in the [PaperStream Capture Pro Administrator Tool] window. In this case, if you install another version of PaperStream Capture Pro, you may not be able to select [Replace All]. When [Replace All] cannot be selected even if there is no batch job that is suspended or aborted in the [Batch Manager] window, delete remaining files in the folder that is specified for [Storage Folder], and then import the operational environment again.

Checking the Import Results of an Operational Environment

The import results of an operational environment can be checked in the following procedure:

1. **Open the folder where the import results are saved.**
   The import results are saved in the following location by default:
   C:\Users*UserName*\Documents\PaperStreamCapture

2. **Double-click the log file.**
   The default file format and file name are as follows:
   - File format
     CSV
   - File name
     PSCImpProfile.csv

3. **The date and time when the log was output are displayed in the first row and the import results for each imported job are displayed in the second and subsequent rows.**
   "OK" is displayed for a successful import and "NG" for a failed import.

For example, when you attempted to import Job1 and Job2 at 17:53:16 on Monday, November 20, 2017 and importing Job1 succeeded but importing Job2 failed, the following results are displayed:

Monday. November 20. 2017 17:53:16		
NG	NEW	Job2
OK	NEW	Job1

PaperStream Capture Specifications

This section provides specifications and system requirements for PaperStream Capture.

- **Specifications**

Function		PaperStream Capture
Scan	Scanner driver	PaperStream IP (TWAIN) PaperStream IP (ISIS)
	Scanning method	Batch Scan mode Simple Scan mode
	Ad hoc scan	○
Image quality	Image check	Multifeed AIQC Blank Page APS accuracy Manual mark
	Image correction	Assisted Scan function
Separation	Separation method	Detect Doc Separator
	Type	Blank Page Page Count Zonal OCR Patch Code Barcode/Two-dimensional code Press Ctrl Specific document (Automatic Profile Selection)
Data extraction	Type	Barcode/Two-dimensional code Zonal OCR Passport ID card (TD1) ID card (TD2)
	Number of available extracted data	20 in total
	Application of extracted data (indexing)	Individual pages
	Supported language for Optical Character Recognition (OCR)	24 languages (*1)
File output	File format	Bitmap, TIFF, Multi-TIFF, JPEG, JPEG2000, PDF, PDF/A, PNG, RTF, Word, Excel, PowerPoint (*2)

Function		PaperStream Capture
	Destination	● Folder, Network Folder, SharePoint, SharePoint Online, FTP, Other App., E-mail, Printer ● Dropbox, Send E-mail, Fax, Google Drive, Microsoft OneDrive (*3)
	Fire size	9 levels (JPEG) 7 levels (PDF)
	Linking the value for the imprinter counter with a file name	○
File input	Importing images	○
Management	Locking changes in the settings	○
	Sorting jobs	○
	Showing/hiding jobs	○
	Exporting/importing an operational environment	○

○ Available

— Not available

***1:** Supported languages are Japanese, English, French, German, Italian, Spanish, Chinese (Simplified), Chinese (Traditional), Russian, Korean,Turkish, Greek, Vietnamese, Portuguese, Arabic, Swedish, Dutch, Polish, Czech, Romanian, Hebrew, Ukrainian, Thai, and Indonesian.

***2:** The scanned images can be output in a Word, Excel, or PowerPoint file format when ABBYY FineReader for ScanSnap is installed.

***3:** If you install PaperStream Connector Option additionally, you can select one of them as the destination for outputting or linking scanned images:

- **System Requirements**

Operating system (*1)	Windows® 10 Home (32-bit/64-bit) (*2) Windows® 10 Pro (32-bit/64-bit) (*2) Windows® 10 Enterprise (32-bit/64-bit) (*2) Windows® 10 Education (32-bit/64-bit) (*2) Windows Server® 2016 Standard (64-bit) (*2) Windows Server® 2019 Standard (64-bit) (*2) Windows Server® 2022 Standard (64-bit) (*2) Windows® 11 Home (64-bit) (*2) Windows® 11 Pro (64-bit) (*2) Windows® 11 Enterprise (64-bit) (*2)

	Windows® 11 Education (64-bit) (*2)
Compatible driver (*3)	PaperStream IP (TWAIN) PaperStream IP (ISIS)
Software	.NET Framework 4.7.2 or later
CPU	Intel® or Intel®-compatible processor
Display resolution (*4)	1024×800 pixels or higher, 65,536 or more colors
Disk space	10 GB or more (*5)
Language (* 6)	Japanese/English/French/German/Italian/Spanish/Chinese (simplified)/Chinese (traditional)/Russian/Korean/Portuguese (Brazil)/Arabic/Turkish For the following languages, only text recognition with Zonal OCR and searchable PDF is supported: Greek/Vietnamese/Polish/Czech/Dutch/Swedish/Romanian/Hebrew/Ukrainian/Thai/Indonesian

***1:** For 64-bit operating systems, this software is supported as a 32-bit application running on a 64-bit operating system.

***2:** Operates as a desktop application.

***3:** PaperStream IP (TWAIN x64) cannot be used.

***4:** When the font size is large, some screens may not be displayed properly. In such a case, use a smaller font size.

***5:** To scan a document, a disk space suitable for the size of the file to be saved is required.

***6:** For Batch Scan mode, when [Compatible with ScanSnap Manager for fi] is selected for [Scanner Driver Profile] in [Scan Settings] in the [Scan] tab, the following cannot be specified as a language that is used for text recognition.

- Greek
- Vietnamese
- Polish
- Czech
- Dutch
- Swedish
- Romanian
- Hebrew
- Ukrainian
- Thai
- Indonesian

Glossary

- **Prior to Use**

Extracted data

This is a set of data that contains information about an image which is extracted from a document that is scanned.
In this manual, it refers to the field values for all of the specified fields and the recognition area.

Multi-station

This is a PaperStream Capture Pro operation that uses a storage server.
It operates with a storage server and client computer stations.
Data is managed on the storage server and tasks are performed on each computer station.

Batch Scan mode

This is a scanning method that is recommended for routine tasks.
You can register settings such as the file format, saving destination, and scan settings as a job in advance, and perform a scan with the job.

Simple Scan mode

This is a scanning method that is recommended for irregular tasks.
Each time you perform a scan, you can change settings such as the file format, saving destination, and scan settings, if necessary.

Job

This is a set of data in which the settings related to a scan and output with PaperStream Capture are registered.
It is used when a scanning method is the Batch Scan mode.

Switch Modes

This is used to switch the scanning method to "Simple Scan mode" or "Batch Scan mode".

Zonal OCR

This is a function that performs OCR (Optical Character Recognition) on a specified area to extract text.

Index information file

This is a file in which an index of an output image or data that is used to identify an output image is output.

PaperStream IP (TWAIN)

This is a scanner driver for our image scanner series.
It is compliant with the TWAIN standards.

PaperStream IP (ISIS)

This is a scanner driver for our image scanner series when PaperStream Capture is used.
It is compliant with the ISIS standards.

- **Basic Scanning Operations**

PaperStream IP Import

This driver enables you to correct and import an existing BMP, JPG, TIF, JPEG, TIFF, or PDF file without using a scanner.
It is compliant with the TWAIN standards.
To use it for the advanced setup, obtain licenses of PaperStream Capture Pro and PaperStream IP Import and activate them.

Batch

This refers to a set of processes which are configured in a job.

- **Useful Functions**

PaperStream ClickScan

This is an application used to scan documents under the basic settings only, using a scanner from our image scanner series.
You can use this application with PaperStream Capture left installed.

Field

This refers to an area that is used to enter the information related to extracted data.

Field Rules

This refers to the rules that you specify for field values.

Patch code

This is a special code to let the scanner recognize the points where documents or batches are divided.
Print it out to use it.

- **Exporting/Importing an Operational Environment**

Scanner driver profile

This is a set of data in which the scan settings in the PaperStream IP driver are registered.

- **Functions of PaperStream Capture Pro**

Field value

This refers to a value for the information related to extracted data.

- **Activating PaperStream Capture Pro**

  Deactivate

  This refers to revoking the authentication of a license.
  Depending on the medium that is used to install PaperStream Capture Pro, the way in which PaperStream Capture Pro operates after its license is activated varies as follows:

  - When it is downloaded from the website and installed
    PaperStream Capture Pro cannot be started until its license is activated again.
  - When it is installed from the Setup DVD-ROM that is bundled with the scanner
    The functions that are specific to PaperStream Capture Pro cannot be used.

Contact for Inquiries

- **Contact for Inquiries**

  Refer to the contact list on the following web page:
  https://www.pfu.ricoh.com/r/ctl/

  - ABBYY FineReader for ScanSnap™
    - Windows 10/Windows Server 2016/Windows Server 2019/Windows Server 2022
      Select [Start] menu → [ABBYY FineReader for ScanSnap (TM)] → [User's Guide] → [Technical Support].
    - Windows 11
      Select [Start] menu → [All apps] → [ABBYY FineReader for ScanSnap (TM)] → [User's Guide] → [Technical Support].
  - fi Series image scanners
    For other inquiries regarding the scanner, refer to the following web page:
    https://www.pfu.ricoh.com/global/scanners/fi/support/index.html
    If the solution to your problem cannot be found on the above web page, refer to the contact information for your distributor/dealer on the following web page:
    https://www.pfu.ricoh.com/global/scanners/inquiry.html