

Readiris PDF *User Guide*

Version 1.3

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Foreword

Information in this documentation is subject to change without notice and does not bear any commitment on the part of I.R.I.S.

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System Requirements

The minimum required specifications to run Readiris PDF are:

Software requirements

Component	Requirement
Computer and processor	1.2 GHz processor or higher
Memory	4 GB RAM or higher
Available hard drive space	5 GB or higher
Operating System	Windows 10, 64-bit
Other	Internet connection

Hardware requirements

For compatibility with scanners, go to Configure your scanner

Caution: small form factor PCs or virtual machines may not be compatible

Download and Install

Before you try and install Readiris PDF, make sure you have the necessary **administrator rights** to install applications on your computer.

Download on Windows Computer

Visit www.irislink.com to download Readiris PDF

Install Readiris PDF

- 1 Double click the executable **installation file** (.msi) to start the Installation Wizard
- 2 Follow the on-screen instructions to finish the installation.

Tip: Run the installer from your local drive. Running the installer from a virtual or an external drive may display Microsoft security messages.

Activate Readiris PDF

Once you have installed Readiris PDF, you need to activate it.

Two types of activation are available: with a **Product Key** or via **User Registration**.

Note: An Internet connection is required!

With a Product Key

- 1 Go to File Menu = > Activation
- 2 Enter your Product Key (22-character code) in the **Activation code** Panel
- 3 Click on **Online activation**

The information about your license on the right panel is refreshed.

Deactivation

To reuse the same Product key on another computer, you must first **deactivate** it on your current computer (one active use at a time).

- 1 Copy and paste the current Product key in the **Activation code** Panel
- 2 Click on **Online deactivation**

Once confirmed, it is ready to reuse.

Via User Registration

If you wish to benefit from the 'activation anywhere', create an account with the IRIS Cloud solution (IRISPulse).

Already have an IRISPulse account?

- 1 Click on Sign in. You are redirected to the IRISPulse Authentication page.
- 2 Enter your credentials (you receive a user token).
- 3 Your available products are displayed in a list.
- 4 **Activate** the product you want to use.

In Readiris PDF, the information about your license on the right panel is refreshed.

Note: When your token has expired, a new authentication will be required

You don't have an IRISPulse account? (Coming soon)

- 1 Click on **Register**. You are redirected to the **IRISPulse Registration page**
- 2 Click on **Register** to create a new user account and receive a free 30-day trial version in your account
- 3 Once your account is created, start the Sign in procedure

Open Readiris PDF

Double-click the Readiris PDF icon on the **Desktop** to launch the application.



Exit Readiris PDF

- 1 Go to the upper-right corner of the title bar
- 2 Click on the **Close button**

OR

- 1 Go to File Menu
- 2 Select **Exit the application**

Navigate the interface

Readiris PDF offers you two menu modes: an **office-style Ribbon** and a **Modern Menu** based on a **input-process-output workspace**.

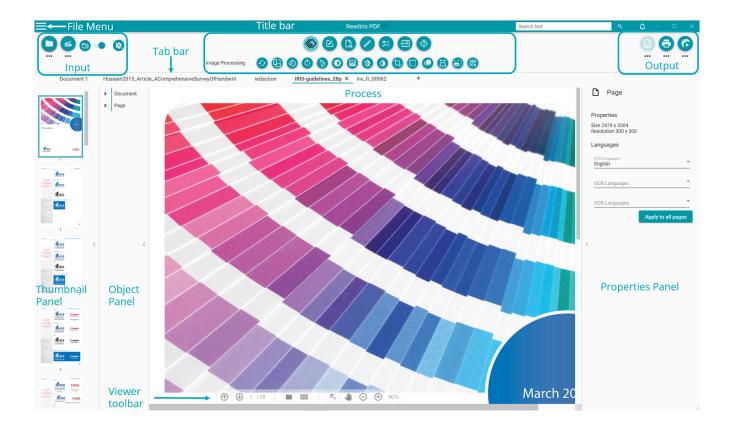
What is a concept of Input -> Process -> Output?

It is an intuitive workspace divided into 3 main areas:

- on the upper left, you import and set the document(s) on which you want to work,
- in the center, you process and edit,
- on the upper right, you set your output and export your result.

At any time, you can **toggle between office-style Ribbon or Modern presentation by pressing F12**.

Tip: When hovering the pointer of your mouse on an icon or a button, a **tooltip** appears, giving you information about the item.



Input Area

The upper left area of the interface is dedicated to **Inputs**.

You can find more detailed explanations about this panel in the **Import** chapter.

Process Area

The **central area** and its full workspace just below are dedicated to processing documents.

- 1. The **features icons bar** (main menu) contains all the possible **actions/processes** to perform on your documents.
 - In the **Preferences**, you can choose to display those actions in a classical **Ribbon** mode.
 - You can find more detailed explanations on each feature in the **Process** chapter.
- 2. The **Tab bar** allows you to see which document is currently open for processing, and to rename a document by right-clicking on the title or by pressing F2.
- 3. The **main Viewer** allows you to process your document and view your actions.
- 4. The semi-transparent **Viewer Toolbar** allows you to:

Icon	Description		
Previous/ Next page	Move through pages		
	Switch from single page view to multi-page view.		
	The single page view allows you to visualize the page objects (zones and annotations) and to edit the page.		
Toggle Single page/Multipage View	The multi-page view allows you to organize your pages. By right-clicking on a page, you access the cut, copy, paste, split, merge and delete options. You can zoom in or zoom out with Ctrl+mouse wheel. You can reorder pages with drag and drop or cut, copy and paste. You can select multiple pages with Ctrl+click. (see Keyboard shortcuts for further options).		
Selection tool	Select objects on the page or draw areas on the page with your mouse cursor.		
Move around the page following your mouse cursor (similar to scrolling up or down as well as left or right at the same time)			
Zoom in / zoom out	Define the display of your page (in percentage): use the buttons +/- OR type in a number OR use the shortcut Ctrl+ mouse wheel. On a tablet, use your thumb and index on the touchpad and pinch in or stretch out		

- 5. The **Thumbnail panel (dynamic panel)** allows you to preview the pages of your document (in **single page view** only). By right-clicking on a thumbnail, you access the cut, copy, paste, split, merge and delete options (see **compose** features). You can zoom in or zoom out with Ctrl+mouse wheel. You can reorder pages with drag and drop or cut, copy and paste. You can select multiple pages with Ctrl+click. (See **Keyboard** shortcuts for further options).
- 6. The **Object panel (dynamic panel)** associated with the **Properties panel (dynamic panel)** allows you to visualize and control the objects present at **document level** (document properties, PDF bookmarks, PDF attachments) or at **page level** (page properties, OCR languages, page zones, stamps, PDF annotations, PDF forms). You can customize the display thanks to the slide button show/hide. The Object panel is available **in single page view** only.
- 7. The **Search box** in the **Title bar** allows you to **search and find text** in the **active/ current document**. Go to **How to search and replace** for more details.

Output Area

The upper right area of the interface is dedicated to **Outputs**.

You can define the **settings** of **format and destination** of your exports.

You can **execute** your exports (cf. Save button).

You can find more detailed explanations about this panel in the Export chapter.

Note: You can **show or hide** the thumbnail, object and properties panels by clicking on the **show/hide arrow** .

File menu

The **File Menu** opens a **navigation** rail.

Icon Description



Info. Gives you information about this software (version, serial number)



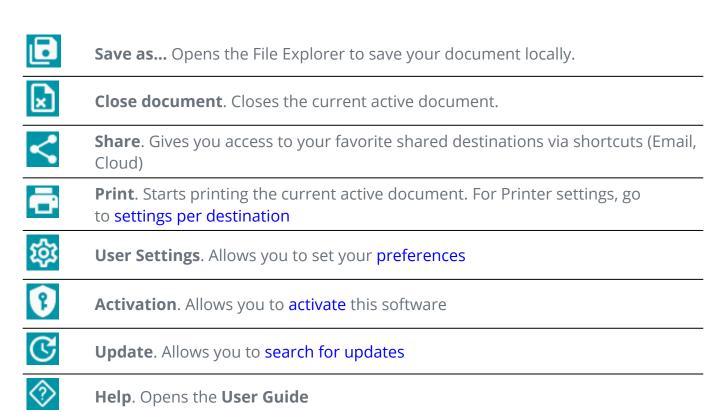
Open. Allows you to **open a document** from Files, Scanner or Clipboard (cf. Import) and shows you the **recently opened documents**.

Also, gives you access to several **actions via shortcuts**: create PDF, edit and modify, convert PDF, annotate and comment PDF, combine PDF, batch processing, Help Quick Tour.



Save. Allows you to **save** your active document to various destinations (local computer, email, Cloud) and includes shortcuts to **convert** to other formats.

Exit the application



Preferences

- 1 Go to File Menu
- 2 Select **User Settings**

User Interface

Light or dark mode

By default, the **light mode** is on.

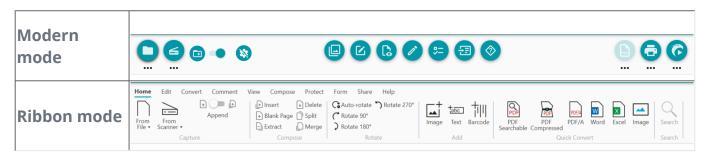
Click on the slide button to switch to the dark mode.

Ribbon or Modern presentation

By default, the **Ribbon presentation** is on. The groups of commands are displayed in a **classic Ribbon** (with **tabs**).

However, the same groups of commands can be displayed in an **icon bar**, which is called the **Modern mode**. This documentation is mainly based on the Modern presentation, to help you familiarize with it. **Tooltips** help you to understand the icons.

Click on the slide button to switch to **Modern mode**. You can also press **F12** to toggle between the two modes.

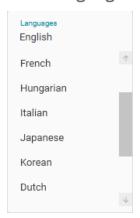


Remember session

By default, your workspace (active tabs) is not remembered at closing of the application. When starting again, go to **File Menu > Open > Recent documents** to reopen your latest documents, or, to save your workspace at each closing, click on the slide button to activate the **Remember session** option.

Change the interface language

Select your interface language within the 'Languages' drop down list.



Legal Notice

By default, the **Usage Intelligence** is on.

Click on the slide button to switch it off.

OCR Settings

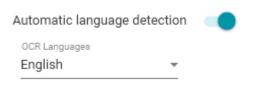
Favor text over layout

The default OCR settings favor the layout over the text. This means the result after recognition will be as close as possible to 'what you see is what you get'.

However, you can choose to favor text over layout (click on the slide button to switch mode). By doing so, Readiris PDF will give the focus on the text and therefore might give a different result of what you see.

Automatic Language Detection (ALD)

Note: By default, the Automatic Language Detection is switched on and excludes manual settings.



Readiris PDF can detect the *main* OCR language automatically. The aim of this feature is to automatically detect **the most probable language on a page**.

The Object Panel shows the detected language at page level. Cf. The page Properties in

the **Properties panel**. There you can modify the OCR language easily and even add two additional OCR languages (e.g. for documents mixing languages). You can apply those settings to all pages at once by clicking **Apply to all pages**.

ALD supported languages

English, German, French, Spanish, Italian, Swedish, Danish, Norwegian, Dutch, Portuguese, Galician, Icelandic, Czech, Hungarian, Polish, Romanian, Slovak, Croatian, Slovenian, Finnish, Turkish, Estonian, Lithuanian, Latvian, Albanian, Catalan, Irish Gaelic, Scottish Gaelic, Basque, Indonesian, Malay, Swahili, Tagalog, Haitian Creole, Kurdish, Cebuano, Ganda, Kinyarwanda, Malagasy, Maltese, Nyanja, Sotho, Sundanese, Welsh, Javanese, Azeri (Latin), Uzbek, Bosnian (Latin), Afrikaans.

Serbian, Russian, Belarusian, Ukrainian, Macedonian, Bulgarian, Kazakh.

Greek.

Hebrew.

Arabic, Farsi.

Traditional Chinese, Simplified Chinese, Japanese, Korean.

Note: Similar variations of a main language are assimilated. E.g. Spanish assimilates all variations of Spanish, Portuguese assimilates Brazilian or French assimilates all variations of French.

Manual setting

- 1 Switch off the Automatic language detection (ALD) by clicking on the slide button next to it.
- 2 Select manually an OCR language from the OCR Languages drop down list.

Import documents

With Readiris PDF you can **open or scan** a various number of file formats and use them as **input**.

Supported input specifications

Input type	Specifications	
Resolution	from 96 to 1200 DPI	
PDF versions	PDF 1.3, 1.4, 1.5, 1.6, 1.7 Extension Level 3 (AES encryption) Extension Level 5 (XML Form Architecture) iHQC - PDF compressed (all levels) (from I.R.I.S)	
Image formats	JPG, JPEG, JPG2000, TIF, TIFF, BMP, PNG	
MS Office formats	.DOC, .DOCX, .XLS, .XLSX, .PPT, .PPTX	

Warning: For a correct image handling and processing, make sure your image size does *not* exceed 75 megapixels

Tip: To configure your **input settings**, go to **Configure input settings**.

Open from local files

- 1 In the **input area**, click on **Open** or press **F5**
- 2 The File Explorer opens, select your file to import
- 3 Click Open

Or simply **drag and drop** a file from the File Explorer.

Import pages from a scanner

1 In the **input area**, click on **Scan** or press **F4**



2 The first time, a pop-up window opens for you to select your source scanner. Once your source is selected, clicking on the **Scan button** will launch the scanning

Create a new document or append to current document

A slide button 👤 allows you:

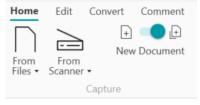
• to import more files by creating a new document (create in a new document) . This is the default setting. Then when you import from a scanner, a pop-up window opens asking you to name the new document. Once the name is confirmed, the scanning is launched. A new **tab** is created for each new document in the **tab bar**.

OR

• to import more files into the current document (append to current document) • The imported pages are added to your current document. You can see them in the thumbnail view.

Notes:

- You can **Rename** the title of your document by right-clicking on the tab title or by pressing F2.
- If the check box 'Use file name' is checked in the input settings, then importing a local file as a new document will reuse the same file name for your imported document.
- In the **Ribbon mode**, go to tab **Home > Capture**.



On The Fly Operations

The button 🔯 allows to activate or deactivate the 'On The Fly' operations when importing.

By default, this option is disabled. When enabled, you can define those On The Fly operations in the settings of each input source.

Import from Clipboard

You can import content from your clipboard thanks to the **Ctrl-V shortcut**. This can be done into an **existing document** or into a **new document**.

For an existing document:

- 1 Open an existing document.
- 2 In the **thumbnail panel (or multi-page view)**, select with your mouse cursor the place (between pages red line) where you want the new page to be created.
- 3 Press **Ctrl-V or right-click your mouse and select Paste** (Paste Before or After if you right-clicked *on* a page).
- 4 A new page is created in your document with your clipboard content.

For a new document,

- 1 Create a **new document** by pressing the plus sign (+) in the tab bar.
- 2 Enter a document name. Click OK.
- 3 Press Ctrl-V.
- 4 The clipboard content is pasted in your new document.

Configure input settings

Configure your local folder

- 1 In the **input area**, click on the **Option menu** ••• (Input settings) below the **Open** button ••. A window opens.
- 2 Define the file format you want to consider for importing.
- 3 Check the box **'Use file name'** if you want to reuse the same name for your imported document.

Configure your scanner

Readiris PDF is compatible with:

TWAIN	It supports almost any flatbed and sheet-fed scanner, all-in-one device, digital camera and scanner currently available	
32-bit drivers	It supports 32-bit scanners only!	
Simplex & Duplex	Scanners that offer duplex scanning are supported	
USB	Scanners with USB plugin are supported	

- 1 In **the input area**, click on the **Option menu** ••• (Scan settings) below the **Scan** button **6**. A window opens.
- 2 Select your **scanner** from the drop down list. All the available scanners (i.e. connected to your computer) have been detected.

On The Fly Operations

Whether you are opening a file or scanning a document, you can define 'On The Fly' Operations.

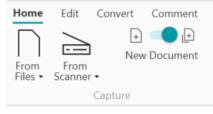
Four image processing operations are available:

- Delete blank pages
- Auto-rotate pages
- Deskew pages

Remove black borders

Select the operations you want to be executed while opening a file or scanning a document. Combinations are allowed. Be aware however that the more operations you select, the more time the opening or the scanning will take.

Note: In the **Ribbon mode**, go to tab **Home > Capture**. Clicking on the small down arrow besides the **From File** button or besides the **From Scanner** button opens the settings windows.



Process image

Image processing features aim to obtain the best possible scan results. The higher the quality of the scans, the higher the recognition accuracy.

In the **Ribbon mode**, go to tab **Edit > Image Processing** to find the image processing features.



Some image processing features listed below require setting properties. Thus, a **Properties panel** opens if applicable.

In the **Properties panel**, you can **modify**, **apply** or **cancel** your settings

lcon/tooltip	Description	Properties
Auto-rotate	Auto-rotate rotates images automatically	
Rotate 90°	Rotate 90° clockwise	
Rotate 180°		
Rotate -90°	Rotate 90° anti-clockwise	
Deskew	Deskew aligns a scanned image horizontally to compensate for skewing	
Contrast brightness	Adjust the contrast and the brightness levels to color or grayscale images	 Brightness slider: optimizes the intensity of light Contrast slider: optimizes the distinction between lighter and darker areas Gamma slider: gamma optimizes the contrast and brightness in the midtones
Grayscale	Grayscale converts color images into grayscale images	

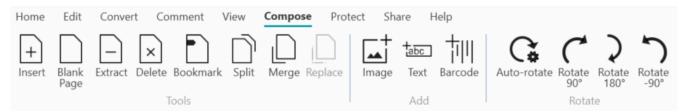
Binarize	Binarize turns color and grayscale images into binary (black-and-white) images	 Brightness slider: optimizes the intensity of light Contrast slider: optimizes the distinction between lighter and darker areas Smoothing slider: it removes noise from the scans. The higher the value, the higher the removal
Negative	Negative inverts the colors of the scanned documents	
Сгор	 Crop the image by defining an area. Click on Crop. The Properties panel opens. Click the mouse and draw a box around the section you want to crop. Drag and drop the box where you want and resize it according to your needs. Click Apply in the Properties panel. Once the cropping is applied, you cannot come back to the original image. You will need to import or scan it again. Click Cancel to remove your cropping selection (before applying) and close the Properties panel 	
Remove black borders	Remove black borders (or dark surroundings)	 Border: 1 (low), 2 (medium), 3 (high) Crop to a selected area of the image: tick the box to enable the cropping
Remove punch holes	Remove black punch holes from your page	
Perspective correction	Correct the perspective distortions of your page (3D correction)	Automatic crop

Downscale	Reduce the size of your page	Downscale percentage (from 100% to 1%)
Text Removal	 Remove all recognized text zones (on single page view). Go to the Object Panel to show the zones (slide button). Text zones are identified in blue. Remove the text zones for the text you want to keep: select text zone, right-click+Delete. Click on Text removal. The text of the remaining zones is removed. For more information on recognition zones. go to Page Analysis. 	 Type: normal, best quality or fast Dilate the text area in pixels (from 0 to 10) Radius of the Inpainting (from 0 to 15)

Compose

Compose features allow you to **organize** your document.

In the **Ribbon mode**, go to tab **Compose** to find the compose features.



Some Compose features listed below require setting properties. Thus, a **Properties** panel opens if applicable.

In the **Properties panel**, you can **modify**, **apply** or **cancel** your settings.

lcon/ tooltip	Description	Properties
New document	 Create a new document Click on New document Enter a document name. Click OK. 	
Split document	 Open the document you want to split Select the page from which you want a split to occur (it will include that page and the next ones). Use thumbnail panel or multi-page mode. Click on Split Enter a name for the new document to be created The new document is created and contains the split content 	
Merge documents	 Open the document you want to merge Click on Merge Choose the <i>Document name</i> you want to merge into Check the box Merge on top if you want your document to be inserted before (by default, it is inserted after) Click OK 	

	The first document is added into the second one (on top or at the end according to your choice)
Insert document	 Open the document in which you want to insert another one (or more) Click on Insert. The import file dialog opens Select one or more files Click OK The selected file is added into the current one To insert a page/document from a scanner, use the Append feature.
Blank page	 Select a page (from thumbnail panel or multi-page view) Click on Blank page A blank page is inserted after the selected page The blank page is the same size as the previous page. If you start your document with a blank page, then by default an A4 is created.
Extract document	Extract page(s) out of your current document. Extracted pages are not removed from the current document. They are copied into a new document. Open the document from which you want to extract one or several pages. Select the pages to be extracted (cf. thumbnail panel or multi-page view). Click on Extract Choose the Document name for your new document Click OK A new document is created out of your extracted pages
Cut	Cut the selected page(s) and copy to clipboard (Ctrl+X)

Сору	Copy the selected page(s) and copy to clipboard (Ctrl+C)	
Paste	Paste the content of the clipboard (Ctrl+V, paste after per default)	
Delete pages	 Select the page(s) you want to delete (from thumbnail panel or multi-page view) Click on Delete pages A confirmation box appears: click yes or no 	

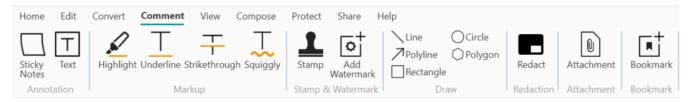
- Tip: From the thumbnail panel or from the multi-page view, you can:
 reorder pages by dragging and dropping
 cut, copy, paste, split, merge and delete pages by right-clicking on a thumbnail or a page

Comment

Comment features allow you to **annotate** your document.

Caution: for most of the **annotations** to appear on your exported documents, the output format *must* be a **PDF**.

In the **Ribbon mode**, go to tab **Comment** to find the annotation features.



Some Review features listed below require setting properties. Thus, a **Properties panel** opens if applicable.

In the **Properties panel**, you can **modify and apply** your settings.

Options

Icon/tooltip	Description	Properties
Stamp (rubber stamp)	 Add pre-defined stamps (e.g. 'Approved' or 'Draft') Click on Stamp. The Properties panel opens. Select the stamp of your choice from the list. Click on the page. The stamp is displayed. Drag and drop the stamp where you want, resize or rotate it according to your needs To customize or to create your own stamps, use the Properties panel. 	 Create a new stamp by clicking on the + button Remove a stamp from the list by selecting it and then clicking on the - button Text to display (e.g. Confidential) Add metadata such as author, date, time-stamp Font type Font color Border type: no border, square, rounded square, left arrow

page. • Click on **Draw**. The choice. Draw the shape on the page. The shape is displayed. For **Polygon** and **Draw** Polyline, draw line segments with your your shape is finished.

- Draw various shapes on the
 - Properties panel opens.
 - Select the shape of your
 - mouse (one-click each), then double-click when
- Fill in the **Properties.**
- Drag and drop the drawing where you want and resize it according to your needs

- Rectangle: select border color, background color, border pattern (dash), border thickness and opacity.
- Circle: select border color, background color, border pattern (dash), border thickness and opacity.
- **Straight line**: select color, dash pattern, thickness and opacity of the line. Check the right box to add an arrow at the start or at the end of the line.
- **Polygon**: select border color, background color, border pattern (dash), border thickness and opacity.
- Polyline: select color, dash pattern, thickness and opacity of the polyline. Check the right box to add an arrow at the start or at the end of the line.

Add a **stamp of digital** signature.

- Click on Signature
- Click on the page. The stamp box is displayed. The **Properties panel** opens. Thanks to the move cursor, you can place the stamp where you want.
- Fill in the **Properties.**
- The **signature stamp** is displayed in one location, but the signature is global for the document.
- Digitally signed by (choose an available certificate in the dropdown list). Make sure your certificate is loaded in Readiris PDF before using it. If your certificate does

not appear, restart the

Reason

application.

- Location
- Contact

Comments and

Signature

Add a small text or a comment/sticky note to your page.

Text: write text, select font color, background color, border color, border pattern, border thickness and opacity of the full shape.

Sticky notes

	 Click on Comments. The Properties panel opens. Select a type: text or sticky note. Draw the box on the page. The text box or the sticky note is displayed. Fill in the Properties. Drag and drop the box where you want and resize it according to your needs. 	• Sticky note: write text, select border color. The plus button allows you to add a reply to the comment (with name and timestamp). Simply use the bin button to delete your comment if needed.
Watermark	Add a watermark across each page. (Not visible on thumbnail and in multi-page view) • Click on Watermark. The Properties panel opens. • Fill in the Properties.	 Text to display (e.g. Confidential) Orientation (diagonal or horizontal) Font type Font color Opacity slider (from 0 to 255) Text size slider (from 30 to 100)
Markup	 Add markups to words or sentences. Click on Markups. The Properties panel opens. Select a markup type and a color Mouse select the word or sentence you want to markup. Also available with Select Text + Right-click 	 Markup type: Highlight, Underline, Squiggly line or Strikethrough Color: select a color The plus button
Redaction	Permanently remove (blacking out) sensitive information from your document. • Mouse select the sensitive text • Click on Redact	

	The text is blacked out permanently after saving. Also available with Select Text + Right-click	
Attachments	Attach a file to your document Click on Attachments. The File Explorer opens. Select your file to import Click Open The file is attached on the current page. The attachment icon appears. Thanks to the move cursor, you can place the attachment where you want. Go to How to view, add or delete attachments for further explanations.	The plus button allows you to add a comment to the attachment (with name and timestamp). Simply use the bin button to delete your comment if needed.
Bookmarks	Add bookmarks to your document (PDF output) • Select the page you want to bookmark • Click on Bookmarks A new bookmark is created, named and ordered after the targeted page number. Bookmarks are visible from the Object Panel > Document Go to How to view, add, rename or delete Bookmarks for further explanations.	

Delete Annotations

- 1 Select the annotation you want to delete. You can do this either via the Object Panel or directly on the page.
- 2 Press **Delete** or right-click and select **Delete**. A confirmation message is displayed.
- 3 Click **Yes**.

Select Text + Right-click

If you mouse select some text on a page and right-click, you can access a few **shortcut actions**:

- **copy** the selected text
- highlight, underline, strikeout or squiggle the selected text (quick markup)
- **redact** the selected text
- rename the document with the selected text as title

Edit

Edit features allow you to **enter and edit** the content of your document.

In the **Ribbon mode**, go to tab **Edit > Edit** to find the edit features.



Some Edit features listed below require setting properties. Thus, a **Properties panel** opens if applicable.

In the **Properties panel**, you can **modify**, **apply or cancel** your settings

Icon/tooltip	Description	Properties
Edit Text	Text Editor. You can edit the content of your document at word, sentence or paragraph levels. Go to How to use the Text Editor for more information.	Text Reflow : select a formatting type:
		 Automatic rearranges automatically the edited text in its paragraph frame according to the alignment options. Resizing the paragraph automatically rearranges it. Manual keeps the edited text on the same line and the paragraph width is adjusted. The Enter key (new line) must be placed manually.
		Select:
		 Font and font size Font color Bold, italic Text alignment: left, center, right, justify

Create Zone	 Create a new recognition zone and associate a type to it. cf. Page Analysis below Select the page on which you want to create a new zone Click on Create Zone Draw a box around the zone you want to define. Fill in the Properties in the Properties panel Drag and drop the box where you want. Resize it according to your needs The Object Panel shows you the new added zone. 	Zone types: graphic, text or table
Analyse	Each page is divided into recognition zones. cf. Page Analysis below. The Object Panel shows you all the recognized zones on a page. Click on the slide button to show/hide them. (Page > Zones) When you click on a zone, the Properties panel opens and the zone type is shown. There you can change it. A zone can be moved or resized thanks to the move or resize cursor.	Zone types: graphic, text or table
Add Image	 Add an 'image' to your page Select the page on which you want to add an image (single page view) Click on Add Image In the Properties panel, open the file explorer by clicking on the 'open file' button Browse and Select the image you want to add 	File explorer button: browse for the image you want to use as a stamp

	 Click Open. The image is displayed in the Properties panel. Click on the page for the image to be displayed Drag and drop the image where you want. Rotate and resize it according to your needs 	
Add Text	 Add a 'text' to your page Select the page on which you want to add text as a stamp (single page view) Click on Add Text Fill in the Properties in the Properties panel Draw the box on the page. The text box is displayed. Drag and drop the text box where you want. Rotate and resize it according to your needs 	TextFont typeFont sizeFont color
Add Barcode	 Add a 'barcode' to your page Select the page on which you want to add a barcode (single page view) Click on Add Barcode Fill in the Properties in the Properties panel Draw the box on the page. The barcode box is displayed. Drag and drop the barcode box where you want. Rotate and resize it according to your needs Go to How to add a QR code to have an example of use case. 	 Text: enter the value of the barcode Type: select between QR, Code39, Code128, Datamatrix or PDF417

Delete stamps

- 1 Select the stamp you want to delete. You can do this either via the **Object Panel** or directly on the page.
- 2 Press **Delete** or right-click and select **Delete**. A confirmation message is displayed.
- 3 Click **Yes**.

What is page analysis?

When you scan a document or open an image file in Readiris PDF, each page is automatically divided into **recognition zones**.

To have them displayed, go to the Object Panel and click on the slide button (show/hide).

Readiris PDF uses those zones to determine how each part of your documents must be converted. If your document does not contain any zones, it cannot be recognized (OCR).

There are 3 kinds of recognition zones. You have **text zones**, **graphic zones** and **table zones**.

Each **zone type** has its own color.

Text	blue
Image/graphic	green
Table	purple

You can also re-launch the page analysis:

- 1 Click on **Edit** in the icons bar or ribbon
- 2 Click on **Analyze** 🗳

Modifying the recognition zones

To change a zone type

- 1 Go to the Object Panel
- 2 Click on the slide button to show the zones.

- 3 Click on the zone for which you want to change type. The **Properties panel** opens and the zone type is shown
- 4 Change the zone type between graphic, text or table

Tip: for better recognition of a **logo containing text**, set it as a 'graphic' zone type

Note: if you want to do **text editing**, use the **Text editor**.

Export documents

With Readiris PDF you can **save** your work under a various number of file formats, locally, or **export** it to the Cloud.

Supported Output specifications

Input type	Specifications	
PDF versions	PDF 1.4, 1.5, 1.6, 1.7, PDF A Extension Level 3 (AES encryption) Extension Level 5 (XML Form Architecture) iHQC - PDF compressed (all levels) (from I.R.I.S)	
Image formats	JPG, JPG2000, TIFF, BMP, PNG	
MS Office formats	.DOCX, .XLSX, .PPTX	
Web format	HTML	
e-Book file format	EPUB	

Warning: For a correct image handling and processing, make sure your image size does *not* exceed 75 megapixels

Tip: For further details on the available **settings per format or per destination**, go to **Configure output settings**

Select your Output format

- 2 Select the format of your choice
- 3 If needed, click on the **Option menu** to define the **settings** of your output format

Select your Output destination

1 In **the output area**, click on **Output destination**

Output destination

A navigation rail opens listing the possible destinations

- 2 Select the destination of your choice: Local, Cloud, Email or Printer.
- 3 Click then on the **Option menu** to define the **settings** of your output destination

Save/Save Batch

Once you are ready to export/save, click the **Save button** or the **Save Batch button** via the **Option menu** ••

Save Batch allows you to save multiple documents in one shot with the same settings.

- 1 Click on **Save batch.** A pop-up window opens and list all the **currently active documents in the workspace**
- 2 Select the documents you want to save/convert
- 3 Click **OK**.

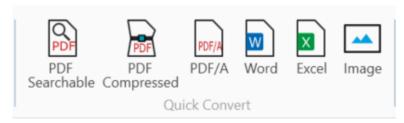
The selected documents are being exported/saved.

Note: In the **Ribbon mode**, go to tab **Convert** to find the export formats and the Save/Save batch buttons.

Quick Convert

Readiris PDF remembers your latest output format and output destination, so that you can simply click the **Save button** if no change in your settings is needed.

In the **Ribbon mode**, the **Quick convert** buttons are available from the **Home** tab. These are the shortcuts to your favorite output formats, without opening the settings panel.



Configure output settings

Settings per format

- 1 In **the output area**, click on **Output format (b)**. A navigation rail opens listing all the possible output formats
- 2 Select the format of your choice
- 3 Click on the **Option menu** below the **Output format** button. A window opens
- 4 Define the settings

In the **Ribbon mode**, go to tab **Convert > Convert**. When you select an output format, the **settings panel** opens.



PDF

Section	Option	Description
Generalities	PDF type	 PDF Searchable (recognized text in background + original image on top of it) PDF Image (original image only) PDF Text (recognized text only, image as graphics) PDF Text/Image (image in the background and recognized text on top of it) PDF Compressed (iHQC). You can select between 4 compression types: Level I: combination of JPEG and TIFF CCITT4 compression Level II-a: combination of JPEG and JBIG2 compression

		• Level III: combination of JPEG2000 and JBIG2 compression Select a type of compression and then use the slider to favor either document quality or document size: from minimal document size (= high compression) to maximal image quality (= low compression). In any case, the text quality is preserved. Default settings are Level I with medium quality. Note that if you select PDF 1.4/A, only PDF compressed level I is available.
	PDF version	13 PDF versions to choose from
	Check boxes: • JPEG compression • Include graphics • Maintain colors of text • Embed fonts • Smoothing	Depending on the PDF type you select, some of these options are made available.
	JPEG quality	Slide from low to high (from 0 to 100)
	Password to open	Set a password (max. 32 characters) that will be required at opening of your document
	Password to edit	Set a password (max 32 characters) that will be required to edit your document. 'Password to open' and 'Password to edit' should be different.
Security	Printing allowed (if password to edit is checked)	No per default. If yes, high resolution or low resolution
	Changes allowed (if password to edit is checked)	No per default. If yes, set the change type you are allowing in your document (from a drop-down list)
	Enable text access for screen reader devices for the visually impaired (if Password to edit is checked)	No per default. If yes, then the text can be read by screen readers for blind or visually impaired users.

	Enable copy (if Enable text access is checked)	No per default. If yes, then the text can be copied.
	Signature	Available digital IDs or certificates are listed in a drop-down list. This is a global signature of the PDF file . Make sure your certificate is loaded in Readiris PDF before using it. If your certificate does not appear, restart the application.
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

Image

Section	Option	Description
	lmage format	 TIFF multi pages BMP JPEG PNG TIFF single page
	Quality slider	Set a quality level for JPEG format (in percentage from 1 to 100)

Word

Section	Option	Description
	Paper size	Select the paper size from a drop-down list (default is automatic)
Generalities	Document structure: • Exact (default) • Editable • Flowing • Liquid	Exact : all detected paragraphs of text are placed in frames to ensure exact reproduction of the original document layout. The whole input image is placed in background to ensure maximum similarity to the original. This option offers less freedom for layout modification.
	·	Editable : the detected elements are placed in frames to ensure exact reproduction of the original document

		layout; graphic elements are created to allow the layout modification.
		Flowing : the layout of the original pages is reproduced as closely as possible with body text and page columns, using frames only for elements outside of the body text.
		Liquid : the layout of the original pages is not retained, all elements are written as body text in reading order.
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

Excel

Section	Option	Description
	Layout	2 choices:Recreate source document (default)Create body text
Generalities	 Check boxes: Merge lines into paragraphs Maintain colors of text Maintain colors of background Convert figures into numbers Ignore all text outside the tables Create one worksheet per table 	Depending on the layout you select, some of these options are made available. Some are checked per default.
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

PowerPoint

Section	Option	Description
Generalities	Layout	3 choices:Standard (default)Fit contentWide screen
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

HTML

Section	Option	Description
	Document structure:	Exact : all detected paragraphs of text are placed in frames to ensure exact reproduction of the original document layout. The whole input image is placed in background to ensure maximum similarity to the original. This option offers less freedom for layout modification.
Generalities	Exact (default)FlowingLiquid	Flowing : the layout of the original pages is reproduced as closely as possible with body text and page columns, using frames only for elements outside of the body text.
		Liquid : the layout of the original pages is not retained, all elements are written as body text in reading order.
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

EPUB

Section	Option	Description
Generalities	Check boxes: Include graphics	Per default, the three options are selected.

	Maintain colors of textMaintain colors of background	
Metadata	Title, subject, author and keywords	Set metadata to provide additional information about your file

Settings per destination

- 1 In the **output area**, click on **Output destination**
 A navigation rail opens listing all the possible output destinations
- 2 Select the destination of your choice: **Local, Cloud, Email or Printer**
- 3 Click then on the **Option menu** •• to define the **settings** of your output destination

Local

Section	Option	Description
	Path	Define the path to your local output folder
	Check box: Open the file after creation	Check that box for the file to open straight after export is finished

Cloud

With Readiris PDF you can send documents to **Box**, **DropBox**, **or OneDrive**.

Warning: You need a valid Box, Dropbox, or OneDrive account and an Internet connection to be able to save your documents there.

Note: In the Ribbon mode, go to tab Share or Convert.

Configuring the Connectors

- 1 Once you have selected a **Cloud** as destination, click on the **Option menu** •••. A window opens.
- 2 Click on the folder icon to edit settings

3 Follow the on-screen wizard instructions to **configure your account** (authentication and path)

The configuration to your favorite Cloud accounts is persisted. Only the authentication is required again when the token has expired.

Email

- 1 Once you have selected the **Email** as destination ³, click on the **Option menu** A window opens.
- 2 Enter your recipient email address and a subject

Once you have clicked the **Save** button, Readiris PDF opens your default mail client for you to compose your email.

Printer

- 1 Once you have selected the **Printer** as destination, click on the **Option menu** A window opens.
- 2 Select a printer from the list
- 3 Click on the Printer settings icon ⁸ to edit settings

How to obtain good recognition results?

The **quality** of the recognition results depends on a number of factors and you are advised to check the following points:

The document language	Make sure you select the right OCR Language in the User settings (ALD or Manual). Especially if your document mixes languages.
The quality of the scanned documents	If the scanned documents are too bright, or too dark, Readiris PDF might have trouble recognizing them.
The rotation of your image	Make sure the imported image has the right rotation. If not, use the Rotate tool in the Image processing options.
The resolution of your imported images	If you are using a scanner to scan documents, the image quality is also linked to the scanner settings. See the section Configure your scanner to make sure the right settings have been selected for your scanner.
	Make the scan resolution is set to 300 dpi for regular documents and to 400 dpi for small print and Asian languages.
The recognition zones	see Page Analysis

Warning: an image of very poor quality will not be correctly recognized even after verification of the above points.

How to do a Right Click conversion?

You can access some **quick actions** via the **Right Click Menu** of your **Windows File Explorer**.

Caution: If you have just installed Readiris PDF, you need to restart before this feature is available.

- 1 In a File Explorer, select one or more:
 - image files (.tif, .tiff, .jpg, .jpeg, .bmp, .png);
 - PDF files (.pdf);
 - Microsoft Office Word documents (.doc, .docx);
 - Microsoft Office Excel files (.xls, .xlsx);
 - Microsoft Office PowerPoint files (.ppt, .pptx);
- 2 Right-click and go to Readiris PDF in the menu
- 3 Select an action:
 - If you selected *one file only*, the available actions are:
 - Open with Readiris PDF
 - Convert to PDF
 - Convert to Word
 - Convert to Excel
 - Convert to PowerPoint
 - If you selected *more than one file*, the available actions are:
 - Open with Readiris PDF
 - Convert to PDF
 - Merge to PDF

Tip: The order of your Convert or your Merge follows the order of your selection/clicks.

Click **Open** with Readiris PDF option if you want to:

- open your files directly in Readiris PDF
- select another output file format
- change the settings of the selected output format

How to use the Text Editor?

To enter editing mode

- 1 Go to **Edit** in the Icon bar
- 2 Click on **Text** 1. The **Properties panel** opens.

In the **Ribbon mode**, go to **tab Edit > Edit section > Edit Text**.

To edit a word, a sentence or a paragraph

- 1 Click in the sentence to enter **caret navigation**. An edition box is displayed around the paragraph.
- 2 Edit text (add or remove characters)

Tip: To **select text** in caret navigation, you can use the keyboard shortcut **Shift+Right or Left Arrow**

To move or resize a paragraph

- 1 Click in the paragraph to enter **caret navigation**. An edition box is displayed around the paragraph.
- 2 Thanks to the move cursor, move the paragraph by dragging and dropping the box where you want.
- 3 Thanks to the resize cursor, resize the paragraph as you want (text can stretch or shrink).

To change font type, font size, font color or font style

- 1 Click in a paragraph to enter **caret navigation**. An edition box is displayed around the paragraph.
- 2 Select the text you want to edit.
- 3 Select the font options in the **Properties panel.**

To change paragraph alignment

- 1 Click in a paragraph to enter **caret navigation**. An edition box is displayed around the paragraph.
- 2 Select the alignment options in the **Properties panel.** The full paragraph is aligned as selected.

How to sign a PDF document

Two ways of signing using digital IDs are available:

Sign with a stamp

- 1 Go to **Comment** in the Icon bar
- 2 Click on **Signature**
- 3 Click on the page. Draw a stamp box. The **Properties panel** opens. Thanks to the move cursor, you can place the stamp where you want.
- 4 In the **Properties** panel, select a digital ID available from the 'Digitally signed by' drop-down list
- 5 In the **Reason** field, select a reason from the drop-down list or enter a new reason (free and optional).
- 6 In the **Location** field, enter a location (free and optional)
- 7 In the **Contact** field, enter the name of a contact (free and optional)

The **signature stamp** is displayed in one location, but is global for the document.

Select a PDF output format for the export.

In the **Ribbon mode**, go to **tab Protect > Sign section** and click on **IDs & Certificate**.

Sign with the PDF output settings

- 1 Go to the Output area, and choose a PDF output format
- 2 In the Settings, go to the Security section
- 3 Select a digital ID available from the 'Signature' drop-down list. The signature is global for the document

The signature is *not* displayed on the document.

Tip: Available **digital IDs or certificates** are listed in a drop-down list. Make sure your certificate is loaded in Readiris PDF before using it. If your certificate does not appear, **restart** the application.

How to view, add, rename or delete Bookmarks

View

You can **view** bookmarks in your document via the Object panel in the Document section.

- 1 Go to the Object Panel > Document
- 2 Click on **Bookmarks**

The list of existing bookmarks is displayed.

When you click on a bookmark, the target page is displayed.

Add, Add child, Set Destination

Add

You can add bookmarks on selected pages.

- 1 Go to the **Thumbnail Panel**
- 2 Select the page you want to bookmark
- 3 Go to the **Object Panel > Document**
- 4 Right-click on **Bookmarks or on any bookmark**
- 5 Select Add

A new bookmark is created, named and ordered after the targeted page number.

If you cut/copy and paste a page, the bookmarks targeting that page are copied and pasted too.

In the Ribbon mode, go to tab Comment > Bookmark section > Add to add a bookmark.

In the Modern mode, go to tab Comment > Bookmarks to add a bookmark.

Add child

By right-clicking on a bookmark, you can also **add a child** to it.

- 1 Go to the **Thumbnail Panel**
- 2 Select the page you want to bookmark as a child
- 3 Go to the **Object Panel > Document > Bookmarks**

- 4 Right-click on the bookmark under which you want to add a child bookmark
- 5 Select Add child

A new child bookmark is created, named and ordered after the targeted page number.

Set destination

You can **redefine the destination** of an existing bookmark.

- 1 Go to the **Thumbnail Panel**
- 2 Select the page on which you want to set the destination
- 3 Go to the **Object Panel > Document > Bookmarks**
- 4 Right-click on the bookmark for which you want to assign the destination page
- 5 Select **Set destination**

The bookmark points to the new selected page.

Rename

- 1 Go to the Object Panel > Document > Bookmarks
- 2 Right-click on the bookmark you want to rename
- 3 Select Rename
- 4 Enter the new name of your bookmark in the pop-up widow. Click **OK**.

The bookmark is renamed.

Delete

- 1 Go to the **Object Panel > Document > Bookmarks**
- 2 Right-click on the bookmark you want to delete
- 3 Select **Delete**
- 4 A confirmation message is displayed. Click **Yes**.

The bookmark is deleted.

If you delete a page, the bookmarks targeting that page are deleted too.

Caution: for the **Bookmarks** to be included in your exported documents, the output format *must* be a **PDF**.

How to view, add, comment or delete Attachments

View

You can **view** attachments in your document via the Object panel in the Document section.

- 1 Go to the Object Panel > Document
- 2 Click on **Attachments**.

The list of Attachments is displayed.

If you select an attachment, the page on which it is located is displayed. An **attachment** icon shows you the location.

Add

You can **add** attachments to your document.

- 1 Go to the Object Panel > Document > Attachments
- 2 Right-click on **Attachments**
- 3 Select **Add**. The File Explorer opens.
- 4 Select your file to import
- 5 Click Open

The file is attached on the current page. The **attachment icon** appears. Thanks to the move cursor, you can place the attachment where you want.

In the Ribbon mode, go to tab **Comment > Attachment section > File** to add a file as attachment.

In the Modern mode, go to tab Comment > Attachments to add an attachment.

Comment

You can **add a comment** on a selected attachment.

- 1 Go to the **Object Panel > Document > Attachments**
- 2 Select the attachment you want to comment (or select directly the **attachment icon** 0)

3 In the **Properties panel**, click on the plus button to add a comment.

A comment is added.

Simply use the bin button to delete your comment if needed.

Save

- 1 Go to the **Object Panel > Document > Attachments**
- 2 Right-click on the attachment you want to save
- 3 Select Save
- 4 The File Explorer opens, select the location to save the file
- 5 Click **Save**

The attachment is saved.

Delete

- 1 Go to the **Object Panel > Document > Attachments**
- 2 Right-click on the attachment you want to delete
- 3 Select **Delete**
- 4 A confirmation message is displayed. Click **Yes**.

OR

- 1 Right-click on the attachment icon
- 2 Select **Delete**.

The attachment is deleted.

Caution: for the **Attachments** to be included in your exported documents, the output format *must* be a **PDF**.

How to add a QR code

QR codes can be very handy nowadays as they can be read and understood by mobile devices.

Let's take, for example, the QR code 'mailto'.

- 1 Go to **Edit** in the Icon bar
- 2 Click on Add Barcode . The Properties panel opens
- 3 Select type **QR**
- 4 Enter an email address in the text field with prefix 'mailto:'. Example: mailto:john.smith@company.com
- 5 Draw the box on the page. The QR code is displayed
- 6 Drag and drop the barcode box where you want. Rotate and resize it according to your needs
- 7 Click on **Save** to export it to your favorite format (PDF, Image, DOCX, HTML or PPTX).

The QR code is included in your document. Anyone who scans it with a smartphone can easily send an email to that recipient or save it as a contact.

How to search and replace

The Search box in the **title bar** allows you to search and find text in the **active/current document**.



In a second step, you can **replace** the found text with a new text.

Search

- 1 Open the document you want to search (single-page view)
- 2 Go to the Title bar > Search text
- 3 Enter the text or phrase you want to locate
- 4 Click on the **Search** button or press **Enter**
- 5 The search results are displayed in the **Properties panel** (you are now in **searching** mode).

It shows you the number of instances and the list of results within context. In the **single page view**, the instances are highlighted in yellow.

Replace

- 1 Enter your new text in the **Replace** field
- 2 Select the instance in which you want to replace text. Click on **Replace**
- 3 To update all instances at once, click on **Replace all**

Note: the **searching mode** does *not* allow selecting text. To select text, exit the searching mode by closing the **Properties panel** (\boxtimes).

How to automatically clean up your scanned images?

You can clean up images *directly at scanning* phase by setting and activating the On The Fly operations.

- 1 In **the input area**, activate the On The Fly operations by clicking on the button $^{oldsymbol{\otimes}}$
- 2 Click on the **Option menu** •• (Scan settings) below the **Scan** button •• A window opens.
- 3 Select your **scanner** from the drop down list
- 4 Select one or more image processing operations among:
 - Delete blank pages
 - Auto-rotate pages
 - Deskew pages
 - Remove black borders

Be aware however that the more operations you select, the more time the scanning will take.

5 Click on **Scan** or press **F4**

As a result, the scanned images are already processed and cleaned up as per your selection of operations.

The setting of these operations is saved and the activate/deactivate button gives you the flexibility to use it only when needed.

About

To find information about this software

- 1 Go to File Menu
- 2 Select Info

There you find the **software version** and the **Serial number**.

Search for updates

- 1 Click on **Help** in the icons bar or Ribbon (tab Help)
- 2 Click on the **Updates** icon

OR

- 1 Go to File Menu
- 2 Select **Update ©**

In the **Ribbon mode**, go to tab **Help** and click on the **Updates icon**.

Keyboard shortcuts

Navigation

Description	Keyboard Shortcut
Toggle between light theme or dark theme (user interface)	F11
Toggle between modern mode or ribbon mode (user interface)	F12
Select multiple thumbnails or pages (multipage view)	Shift+Click, Shift+Up or Down Arrow Keys, Shift+Page Down, Shift+Page Up
Select text in text editor	Shift+Right or Left Arrow keys

Commands

Description	Keyboard Shortcut
Go to Open section in the File menu	Ctrl+O
Zoom in or zoom out in the main Viewer (single or multi-page view) and in the Thumbnail panel	Ctrl+ mouse wheel
Cut	Ctrl+X
Сору	Ctrl+C
Paste	Ctrl+V (per default: paste after)
Save as	Ctrl+S
Print current document	Ctrl+P
Delete	Del
Rename document in the tab bar	F2
Open file	F5

Start scanning	F4
Start exporting	F9

User Guide

- 1 Click on **Help** o in the icons bar
- 2 Click on the **Documentation** icon

OR

- 1 Go to File Menu
- 2 Select **Help** 📀

In the **Ribbon mode**, go to tab **Help** and click on the **User Guide icon**.

Guided Tour

Take a tour of the Modern User Interface.

- 1 Click on **Help** o in the icons bar
- 2 Click on the **Guided Tour** icon

Uninstall Readiris PDF

Should you want to remove Readiris PDF from your computer, follow the **Uninstall instructions** of your **Operating System**.

On a Windows 10 OS:

- 1 Close Readiris PDF
- 2 From the Windows Start menu, go to Settings > Apps > Apps & features
- 3 Select Readiris PDF from the list and click **Uninstall**

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Patent Statements

Readiris PDF integrates the following patent-granted I.R.I.S. technologies: US8068684; US8331706; US8666185; JP5501958; US8995780; EP2143039A2; EP14163365.1; BE1022166; BE1022635; US8913836; BE1022630; US8897600; BE1022636; US8811751; US8411940; BE1021013; US9058517; US9183636; US9311558; BE1025006; BE1022562; US9798943; BE1024194; US9836646; BE1024836; CN106462773B; CN106255979B; JP6609267; JP6693887B2; GB2571530; BE1026039; GB2572386; BE1026159; BE1026095.

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