Section 1: Installation and Activation

System requirements

This is the **minimal system configuration** required to use Readiris:

- A Mac computer with a 64 bits Intel processor.
- The operating system Mac OS X 10.9 or higher. Earlier versions of the Mac OS operating system are not supported.
- 400 MB of free hard disk space.

Installation and Activation

Installation

- Download the Readiris package from **www.irislink.com/softwaredownload**.
- Run the Readiris installation package and follow the on-screen instructions.

- Agree with the terms of the license agreement.
- Then click **Install** to start the actual installation.

    You might be asked to enter an Administrator Username and Password to install Readiris.

Activation

- You are prompted to **activate** Readiris.
- The activation code consists of 34 characters. Depending on how you purchased Readiris, the code can be found:
    - Inside the DVD box
    - On the sticker on the backside of the CD-ROM sleeve
    - On a license sheet called "License sheet for SN for IRIScan..." located inside the product box
    - In your confirmation e-mail for electronic order
- Enter the **activation key**, and then click **Activate**.

    Note that an internet connection is required to activate. If you don't have an internet connection, see **Manual Activation** below.

    You can also choose to start the trial if you do not want to activate Readiris at this time. Fill in the form and click **Start trial**. Next time you start Readiris you will be prompted again to activate the software.
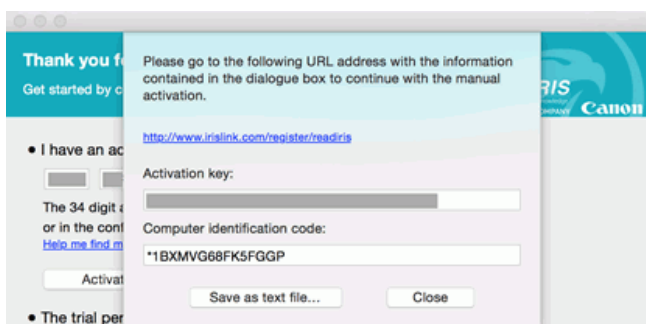
Manual Activation

If you don't have internet access or when an error occurs during the activation process, an error message is displayed allowing you to do a manual activation.

- To do so, click **Manual Activation** in the error message.
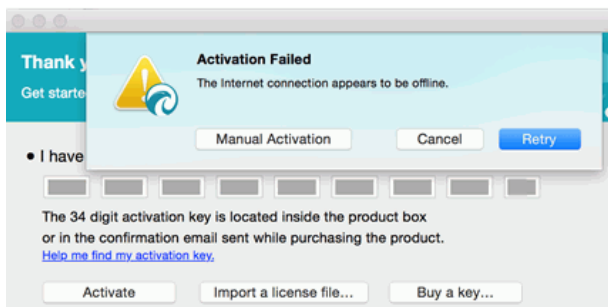
- Click **Save as text file** to save all the info I.R.I.S. needs to continue with the Manual Activation.
  It is recommended to keep the default file name and default storage location.

- On another computer on which you do have internet access: open the Web page indicated in the dialog box: **http://www.irislink.com/register/readiris**.
- On the Web page click the **Submit a ticket** link.

- Fill in all required fields and click **Add File** at the bottom of the page.
- Select the Text file you saved.
  The default file name is **Readiris Activation.text**. The default storage location is the Desktop.

- Click **Submit** to submit the ticket.
  You will receive the license file by email within 24 hours.
- Return to Readiris and click **Import a license file** in the **Activation** dialog box.

- When the installation is finished, click **Close**.
  The **Readiris** folder is added to the **Applications** folder by the installation program.

Software Registration

Registering is required to get **Technical Support**. It also offers other benefits, such as free updates, free trial downloads, video tutorials, discount on new products, and so on.

To register Readiris:

- On the **Help** menu, click **Register Readiris** to be directed to the Registration page.
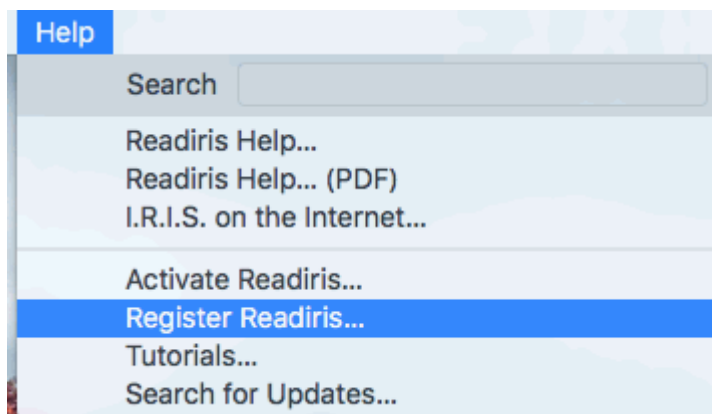
- Fill in your data and click **Submit**.

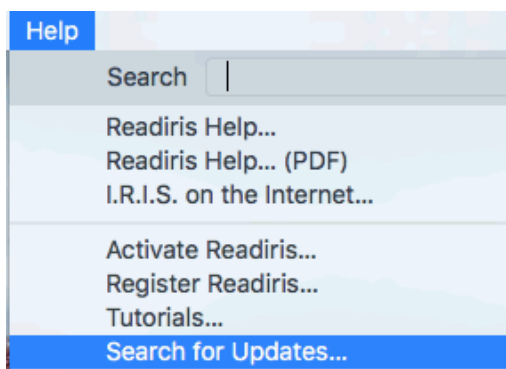Note that an internet connection is required to complete the registration.

Check for updates

When you register your copy of Readiris you are entitled to free software updates.

To check if updates are available:

- On the **Help** menu, click **Search for Updates**.

Note: Readiris automatically checks for updates every 30 days.

Uninstalling Readiris

To remove Readiris from your computer:

- Click **Finder** and open the **Applications** folder.
- Drag **Readiris** to the **Trash**.

Readiris will be removed from your machine.

Note: the Readiris **preferences** are *not* removed by dragging **Readiris** to the trash can, in case you should want to re-install the software later on.

To remove the preferences:

- In the Finder's **Go** menu, press and hold **Alt**.
- Click **Library** > **Library** > **Application Support.**
- Drag the **Readiris** folder to the trash.

Technical Support

If you register your copy of Readiris you are entitled to free technical support. In the **Technical Support** section of our website **www.irislink.com/support** you can find F.A.Q.'s (frequently asked questions), Video Tutorials, and much more information to solve common issues.

If you still can't find an answer to your question, click **Technical Support Contact** and fill in the **Web Contact Form**.

Section 2: Getting Started

Exploring the interface

The new Readiris interface looks as follows:
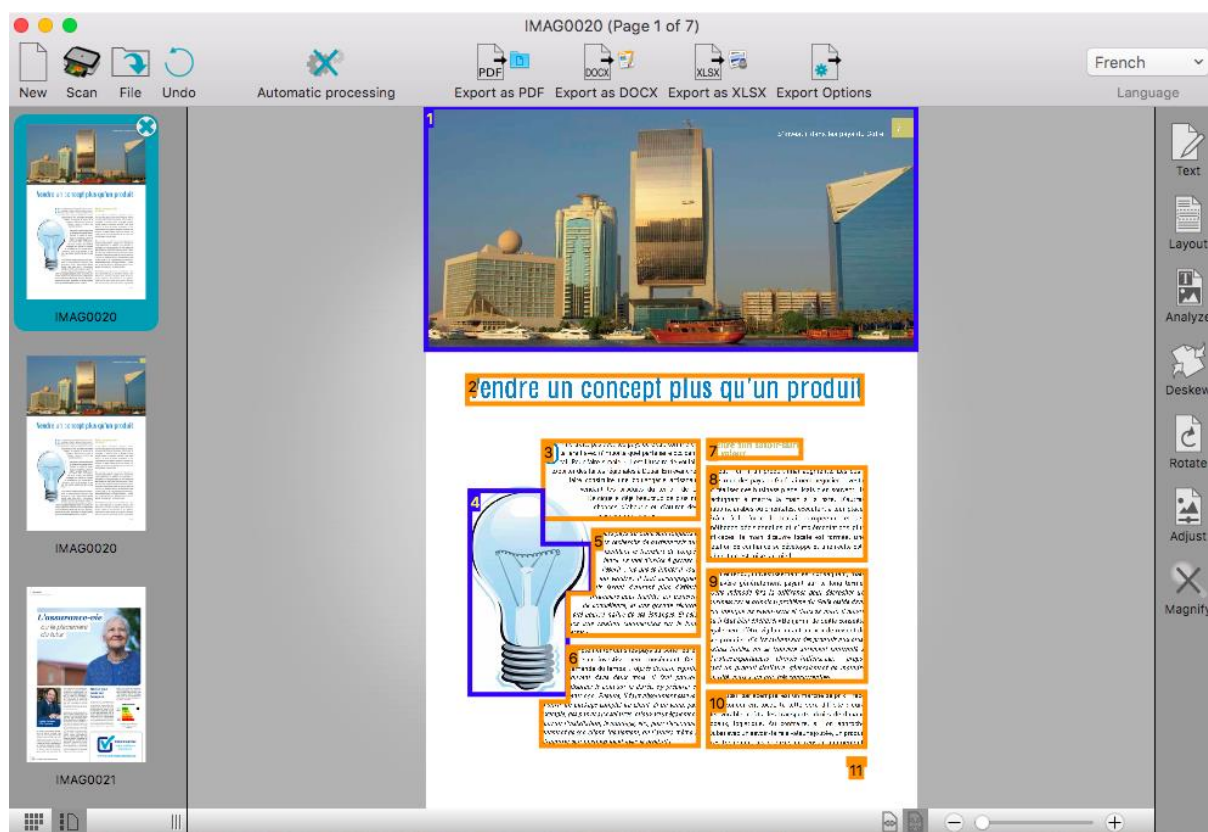
The interface consists of the following components and panels:

1. The Readiris menu bar

The Readiris menu bar regroups all the commands and options available in Readiris, including advanced settings.

2. The top toolbar

The top toolbar is by far the most important tool in Readiris. It contains all the basic commands you need to scan and export your documents.

Three default **Export** buttons are available to export your documents as **PDF**, **DOCX** and **XLSX**.
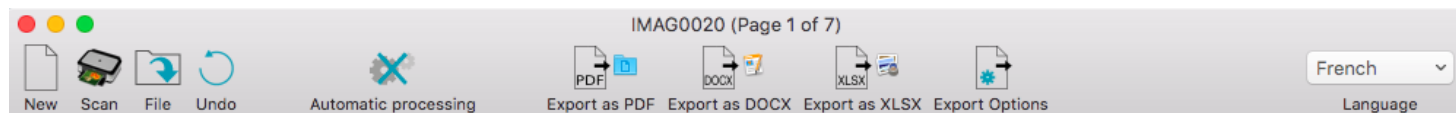
To change the default options of an **Export** button, click and hold it until its **Options** menu appears. Then move the cursor to the **Options** menu to open it.
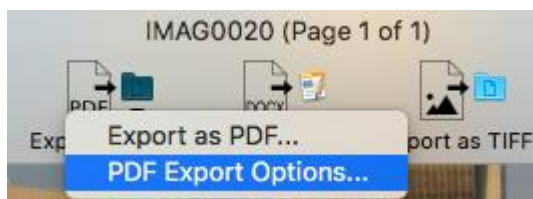
If the default Export buttons don't suit your needs and you want to select a different output format, click **Export Options**. Then drag the required output format to the **Favorites** list and configure its options. For more information see **Select the Output Format.**

Note that you can also customize the top toolbar by adding or removing commands. To do so:

- **Ctrl**-click the toolbar and click **Customize Toolbar**.
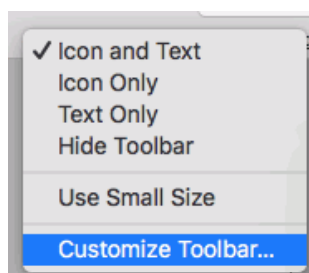
- Drag-and-drop the commands you want to move from or to the toolbar.

3. The Scanned image

When a document is scanned or opened into Readiris, its image is displayed. The different recognition zones are displayed. The zones can be edited with the tools in the **Image and Layout Editing toolbar**.

4. The Pages panel

Each page you scan or open in Readiris has its thumbnail displayed in the Pages panel. The pages are processed top-down. To change the order of the pages, you drag a page from one location to another.

To have a better overview of the page thumbnails you can switch to Thumbnail view. In this view only the page thumbnails are displayed. The analyzed image is not displayed anymore. In Thumbnail view the thumbnails run from left to right, and from top to bottom.

To switch to Thumbnail view, click the Thumbnail view icon at the bottom of the Pages panel.

5. The Image and Layout Editing toolbar

The Image and Layout Editing toolbar allows to modify the current page: you can open the **Text Corrector**, change the **Layout** of the page, deskew pages that were scanned at an angle, rotate them, adjust the image quality, and so on. Point to the different buttons to display their tooltips.

Also see the sections **Optimizing the Scanned Documents** and **Editing the Recognized Documents** for more information.

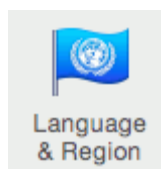## Changing the user interface language

Readiris opens in the user interface language that is currently activated in your Mac System Preferences.

To change the user interface language in Readiris:

- Click the **System Preferences** icon.

- Click the **Language & Region** icon.

- Drag the language of your choice to the top of the list.

    The user interface of Readiris is available in the following languages: English, French, German, Italian, Spanish, Dutch, Russian, Japanese, Traditional Chinese, Simplified Chinese, Korean, Danish, Finnish, Norwegian, Portuguese, Brazilian Portuguese, Swedish and Turkish.

- Close Readiris and restart **the computer** to apply the new language settings.

Configuring your scanner in Readiris

Readiris supports all **Twain 1.9** compliant scanners, all **Image Capture** compliant scanners, and **IRIScan 3** and higher scanners.

Most Image Capture scanners are plug and play. Before you can use a Twain scanner, however, its drivers need to be installed on your Mac.

Twain scanners

- Connect your scanner to your Mac and power it on.
- Install your scanner's Twain driver.

    In general, drivers can be found on the CD-ROM provided with your scanner and on the website of your scanner manufacturer. They are not provided by I.R.I.S. Note that some scanner drivers may not work under the latest versions of Mac OS. See the documentation supplied with your scanner to find out which platforms are supported. If necessary, contact your scanner manufacturer.

IRIScan Express scanners

- Connect your IRIScan Express scanner to your Mac and power it on.
- If Readiris is part of your IRIScan product, the driver has been installed during the installation of Readiris.

If that is not the case, visit our website **www.irislink.com/support** to download and install the required driver.

IRISCard Anywhere / IRIScan Anywhere / IRIScan Book scanners

You do not need to install any drivers when using these scanners. They are not Twain driver-based scanners that can be used from within any application to scan documents. Instead, they are designed to be used on their own, disconnected from any computer. The documents you scan are stored in the scanner's internal memory (or optional SD card / USB flash drive). From there, they can be loaded directly into Readiris when you connect the scanner or insert the SD card or USB flash drive into your Mac.

To check if the scanner driver has been installed successfully:

- In the **Readiris** menu, click **Preferences**.
- Click the **Scanner** tab.
- You should see your scanner listed*.

    *This is not the case for the IRISCard Anywhere, IRIScan Anywhere and IRIScan Book scanners.
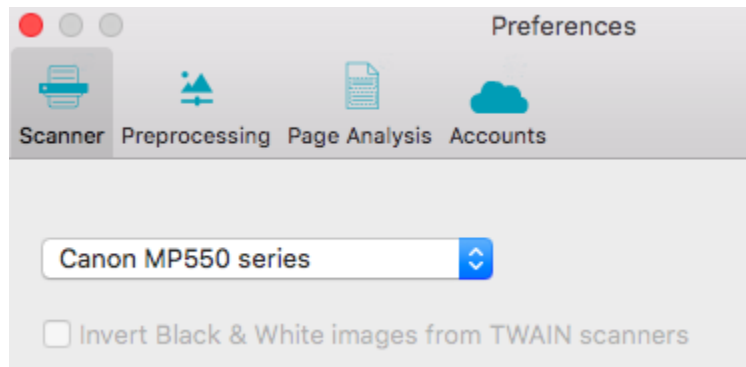
    If your scanner is not listed, its driver has not been installed successfully.
- Once the scanner has been configured you can start scanning, using the default scanner settings.

Section 3: Basic Document Processing

Processing documents with Readiris is fairly straightforward when using a basic configuration. In this section we discuss which steps to take when doing such a basic configuration. For detailed information about all the configuration steps, see sections 4 to 9.

Step 1: Scan, Open or Drag-and-Drop your images

In order to scan paper documents your scanner must be correctly configured. See the section **Configuring your scanner** if necessary.

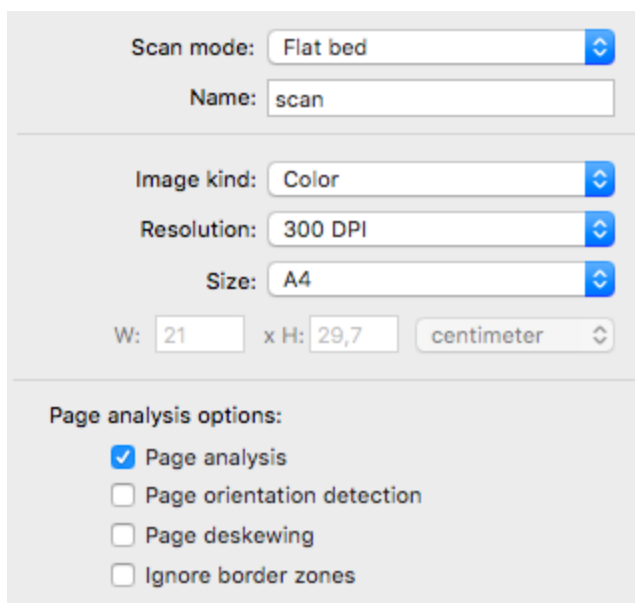- Click **Scan** to scan paper documents with your scanner.

    A preview window opens and displays your scanner settings. With TWAIN scanners, these settings differ from one scanner to another.

    - Select **Color** and **300 DPI** as preferences to obtain optimal results.

    - Select the **Page Analysis Options** of your choice:

        Page Analysis is selected by default. This option divides your documents into recognition zones. Without recognition zones, Readiris cannot process your documents. If you choose to disable this function, you will need to draw recognition zones manually on your documents.

        Readiris can **deskew** (straighten) documents and **rotate** them by means of **Page orientation detection**.

        When your scanner generates black borders around your documents, or when your documents contain information that is partially cut from the page, Readiris tends to create recognition zones on the borders of the document, even though they do not contain any useful content. In such cases it is recommended to use the option **Ignore border zones**.
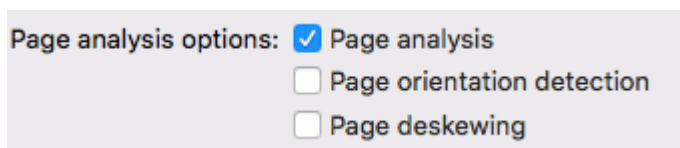

or

- Click **File** to open existing image files.

    - Select the **Page Analysis Options** of your choice.

        The same **Page Analysis Options** are available here.

Or drag and drop PDF and image files to Readiris. You can do so in several ways:

- You can drag and drop files to the Readiris icon in the Dock.
  The files will be added **after** the images that are already loaded into Readiris.

- You can drag and drop files into the Readiris interface that is already opened.

  > **Tip**: when you drag files to the Pages panel, you can choose where they will be inserted.

- You can drag and drop image files from the **Photos** app into the Readiris interface that is already opened.

  > **Note**: it is not supported to drag images files from the Photos app to the Readiris icon in the Dock.

The images are displayed in the interface.

Step 2: Modifying the images

The images you scan and load into Readiris can be modified easily:

- To change the order of the pages, drag the thumbnails to a different position in the Pages panel.
- To delete a page, select a page and click the delete icon.
- To delete a zone, select it and press the Backspace button on your keyboard.

If OCR errors need to be corrected, use the Text Corrector. See the section **Editing the Recognized Documents** for detailed information.
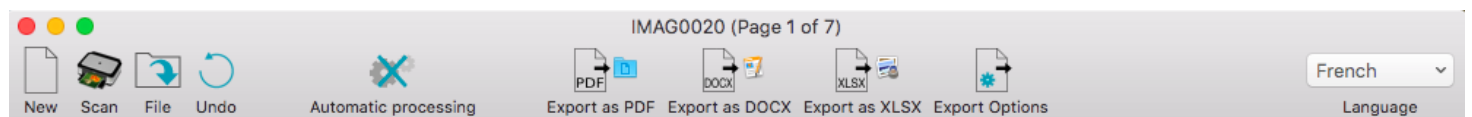
Step 3: Select the Recognition Language

Selecting the right document language is essential to obtain good recognition results with Readiris.
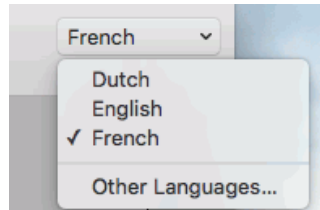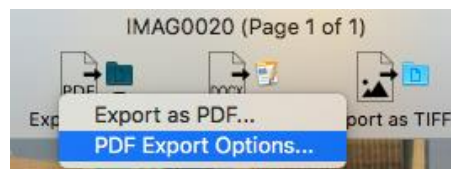

Step 4: Configure the Output

To export your documents directly in one of the default output formats and destinations, click one of the default **Export** buttons.

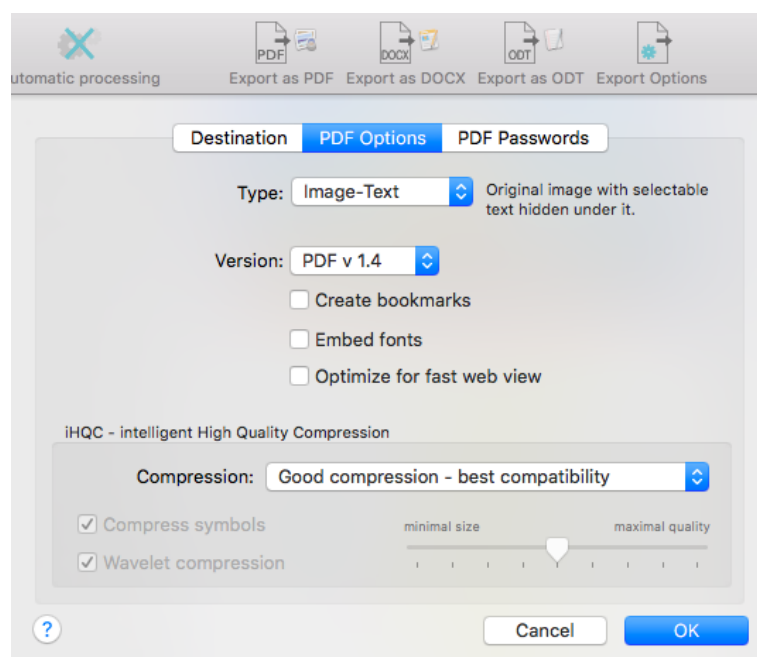**To change the default settings of an Export button:**

- Click and hold an **Export** button until its **Options** menu appears.

- Then move the cursor to the **Open** menu to open it.
 Now you can change the formatting and destination options.

To select a different output format than the 3 default ones:

- Click **Export Options**.

- Select the format of your choice and drag it to the **Favorites** list.

- Configure its formatting options.
  For detailed information about the different output formats and the different formatting options, see the section **Select the Output Format**.

- Configure its destination.
  You can save documents as file, open them directly in an application or send them to a configured online Storage System.

> **Note**: the connection to the online Storage System must be configured correctly to be able to export. See the section **Select the Destination** to learn how to do so.

- When you select **Open in application**, a default application is suggested for the selected output format.
  When you select PDF for instance, the output file will be opened in the Preview application. DOCX and RTF documents will be opened in the installed text editing applications. XLSX documents will be opened in the installed worksheet editor.

- To change the application, click it and then click **Select Application**.
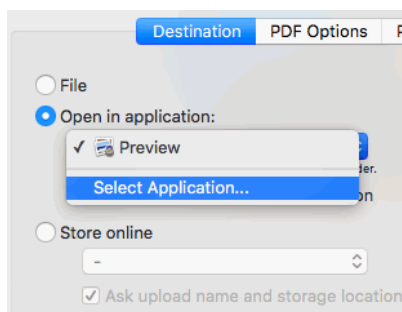
- When you are done, click **OK**.

When you've gone through these steps, click the **Export** button of your choice to start the text recognition and generate output documents.

Undoing an operation

Most of the operations you do or settings you configure can be undone with the **Undo** button.

The number of Undo operations is unlimited. Hover the mouse over the **Undo** button to see which operation will be undone.
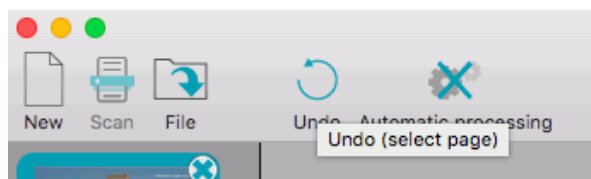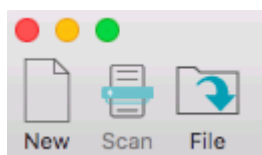

Starting a new project

When you are done saving your scanned documents, or when you want to start over:

- Click **New** on the top toolbar.

  This command erases your documents from Readiris so you can start a new project.

Automatic Processing

If you want to speed up the processing in Readiris or need to process batches of scanned documents, you can use the **Automatic Processing** feature. This feature automatically processes the documents you scan and open in Readiris, converts them into the output format you defined, and exports them either to a specific folder you defined or to the configured online Storage System.

To start automatic processing:

- Click **Automatic processing** on the top toolbar.

- Select **Automatically process all imported images**.

- Select the required **Output format**.

- Select an **Output folder or account** to which the processed documents must be exported.
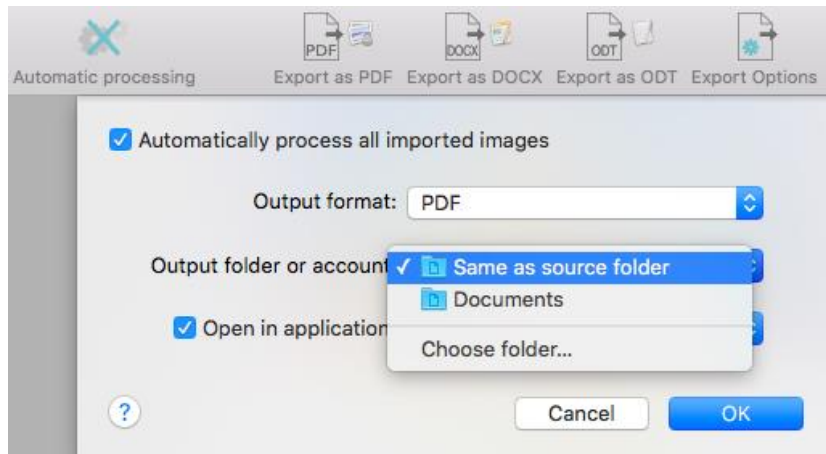
- Select in which **application** the processed files must be opened.

- Then start scanning or opening documents in Readiris. Or drag series of image files to Readiris.

   Important notes:

   When you scan multiple documents one after the other - on a scanner equipped with a document feeder for instance - all the documents are bundled into a **single output file**. The same goes for opening multiple image files at a time.

   When you scan documents on a flatbed scanner, each page will be saved in a **separate output file**.

   Tip:

   Besides Automatic Processing, **Readiris Corporate** also offers **Batch Processing** and **Watched Folder** features to process larger batches.

Saving and loading settings

Note that Readiris saves the processing settings automatically when closing the application. Next time you start Readiris it applies the same settings.

In case you want to save a specific settings profile:

- First, select the required settings.
- On the **Settings** menu, click **Save Settings**.
- Name the settings, select an location and click **Save**.

The following settings will be saved: primary and secondary languages, favor recognition accuracy over speed, output format and any selected output format options, including PDF passwords, target application, online storage system settings, page sizes, page separation and indexing settings, page analysis, despeckling and deskewing options and training options.

Loading Settings

To load a settings file you saved:

- On the **Settings** menu, click **Open Settings**.
- Browse for the settings file you saved.

Restoring Factory Settings

- On the **Settings** menu, click **Restore Factory Settings**.