



Cardiris™ 4

User Guide

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The Cardiris software is based in part on the work of the Independent JPEG Group.

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CHAPTER 1

INTRODUCING CARDIRIS

Cardiris allows you to scan business cards, recognize them and convert them into an address database.

By means of OCR (Optical Character Recognition) the data on business cards is extracted automatically from the image, converted into editable text and inserted in the correct database fields through field analysis.

Cardiris extensively uses a knowledge database, thus acquiring the necessary intelligence to distinguish between first and last names, cities and states, telephone and fax numbers etc.



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Any data the OCR process cannot assign to a specific field is placed in the **Note** field.

The Cardiris field analysis process is also based on the card layout. Each country has a different “style” of composing business cards: Americans compose an address differently than the French do, Dutch ZIP codes and telephone numbers have a different syntax than their British counterparts etc. This works for **217 countries**.

Reading Asian-language business cards from China, Japan, South Korea and Taiwan requires the **Cardiris Asian edition**.



Cardiris not only analyzes but also formats the recognized text. The resulting data can be exploited in many ways. You can save your contacts in the Cardiris database, based on the standard Mac OS X application Address Book. Or save your contacts in a structured file, e.g. in the vCard format, to export them to any address database. Alternatively, you can send the contacts directly to your contact management software such as Microsoft Entourage, Now Contact etc. or import them in the spreadsheet program Microsoft Excel.

Use iSync to send your personal contacts to other devices (Apple iPod, hand-held computer, mobile phone etc.)



CHAPTER 2

INSTALLATION

SYSTEM REQUIREMENTS

This is the minimal system configuration required to use Cardiris:

- A Mac with either a Power PC G3 (or above) processor or an Intel Core processor.
- The operating system Mac OS X 10.3.9 or higher. Earlier versions of the Mac OS operating system are not supported.
- 160 MB of free hard disk space.

INSTALLING CARDIRIS

The Cardiris software is delivered compressed.

To install the software:

- Insert the Cardiris CD-ROM.
- Double-click on the Cardiris installer and follow the on-screen instructions.

You are recommended to use the easy installation, it installs all the necessary files on your hard disk.

REGISTER YOUR CARDIRIS LICENSE

Remember to register your Cardiris license.

To register:

Use the **Registration** wizard in the **Register** menu. Follow the on-screen instructions.

SOFTWARE UPDATES

The command **Search for Updates** under the **Help** menu allows you to keep your software up-to-date. Click the command to download any available updates and patches from the I.R.I.S. website.

PRODUCT SUPPORT

To get technical support on Cardiris, please visit our website at www.irislink.com/support.

UNINSTALLING CARDIRIS

To uninstall Cardiris:

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

Cardiris will be removed from your machine.

Note: the Cardiris preferences are not removed by dragging the Cardiris folder to the trash can, in case you should want to re-install the software later on. To remove the preferences, drag the folder **Cardiris Prefs** to the trash. You will find this folder in **Users - xxx** (your user name) - **Library - Preferences**.

CHAPTER 3

SUPPORTED SCANNERS

TWAIN SCANNERS

Cardiris supports all Twain compatible scanners. Note, however, that a 1.7 or higher Twain driver is required to scan with Cardiris. Access the website of your scanner manufacturer to download up-to-date Twain drivers.

Installing a Twain Scanner under Cardiris

- Insert the CD-ROM that came with your scanner to install the Twain driver on your computer.
- Make sure that you have selected the appropriate driver. To do so:
 - Verify that the scanner operates correctly in any scanning application other than Cardiris.
 - Select your scanner in the Cardiris software by clicking on **Preferences** under the **Cardiris** menu.

Using the Twain Module

- Click the **Options** menu of your Twain driver to specify the scanner settings.
- Determine the color mode, page size, page orientation, brightness, contrast, and scanning resolution.

It is recommended to use a scanning resolution of 400 dpi.

IRISCARD AND IRISCAN SCANNERS

Cardiris is available in a bundle version with the I.R.I.S. **IRISCard** and **IRIScan** scanners.

FUJITSU SCANNERS

Cardiris supports **Fujitsu** scanners thanks to the **ScanSnap Manager** software.

Operation

- Click the **Application** tab of the ScanSnap Manager software to select **Cardiris** as target application.
- Use the other tabs (e.g. **Sanning, Paper Size**) of the ScanSnap Manager to set the scanning parameters.
- Scan images. They will be sent to Cardiris automatically.

UNSUPPORTED SCANNERS

Should your scanner currently not be supported by the Cardiris software, then scan business cards as images.

The following image formats can be imported in Cardiris: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime,

TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

Contact I.R.I.S. to acquire supported scanners.

CHAPTER 4

SCANNING CARDS

SCANNING BUSINESS CARDS

- Click the **scanner icon** in the vertical toolbar to select the appropriate scanner.



- Open the **Cardiris** menu and click **Preferences** to specify the correct scanner settings.

Select a scanning resolution of 400 dpi to recognize business cards successfully.

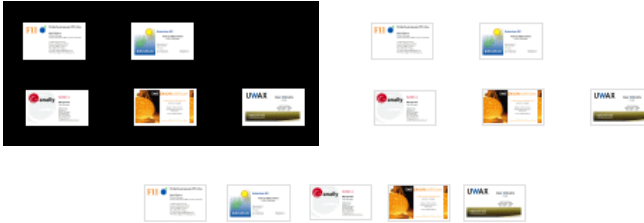
Make sure to calibrate the **IRISCard Pro** or **IRISCard Mini** when you're using it for the first time. To do so, insert the white calibration card supplied with your business card scanner and click **Calibrate** under the **Process** menu.

- Select **Business cards** as document type.



Only when the document type **Business cards** is selected, will the data on the card be recognized and assigned to the appropriate data fields.

When you're scanning with a flatbed scanner, you can scan several cards simultaneously on the flatbed and have them split up by the software. The background must be black to extract the various business cards. To create a black background, scan cards with the lid open.



The complete page as you scanned it will never appear as such on the computer screen; only the segmented business cards will.

- Specify the **card style** of the business cards: click the **globe icon** to select the country the business card belongs to.



You can activate one card style at a time.

Apply drag-and-drop OCR in case you need only part of the data on the card.

- Scan the business cards with your scanner - the card recognition is automatic.



Note that the option **Card Orientation Detection** is enabled automatically to have the business cards straightened for you.

To disable automatic card orientation:

- Go to the **Settings** menu

- Uncheck the option **Card Orientation Detection**

Should you still need to rotate an image, use the manual rotation button.



Note that Cardiris **deskews** and **crops** all scanned business cards automatically.



You can also crop manually by drawing a frame around the actual card and clicking the **Crop** button.

You can undo a crop operation with the **Undo** command and with the **Revert** command under the **View** menu.

When you crop a business card, the recognition is re-executed.

Cardiris can also scan the reverse side of a business card and add a photo of your contacts to the database. See the sections **Scan the reverse side of a card** and **Scan a photo of a contact** for more information.

LOADING IMAGES FROM THE IRISCAN AND IRISCARD ANYWHERE SCANNERS

When you use Cardiris in combination with an **IRIScan Anywhere 2 scanner** or an **IRISCard Anywhere 4 scanner**, you can scan your business cards anywhere you want without needing a computer and load them into Cardiris at a later time.

Operation

- If you decide to use an external storage device (SD memory card or USB flash drive) to store your scans, insert it into the scanner.
- Scan your business cards with your IRIScan Anywhere 2 scanner or IRISCard Anywhere 4 scanner.

For information on how to use these scanners correctly, refer to the scanners' **Quick User Guides** or **User Guides**.

The paper **Quick User Guide** can be found in the package box.

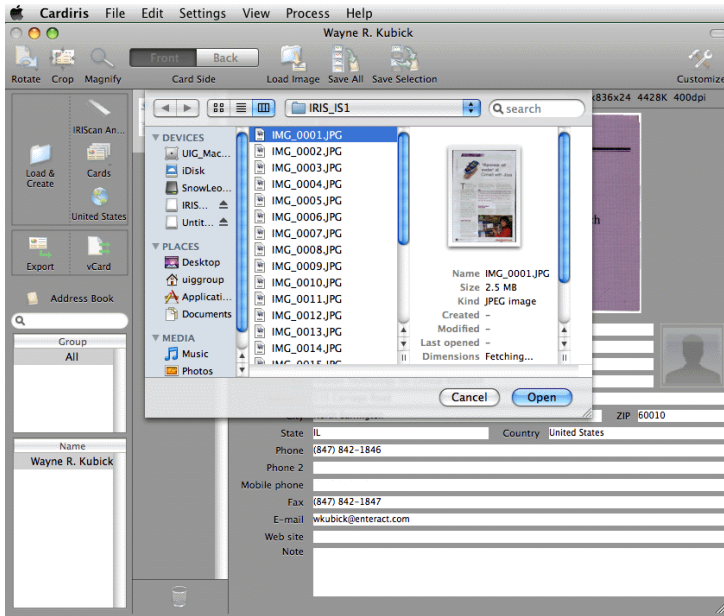
To access the electronic **User Guides**:

- Click **Finder > Applications > IRIScan Anywhere 2 Scanner User Guides > IRIScan Anywhere-English.pdf**.

or

- Click **Finder > Applications > IRISCard Anywhere 4 Scanner User Guides > IRISCard Anywhere-English.pdf**.

- In case you stored your documents on an external storage device (SD memory card or USB flash drive), insert the storage device into your computer.
- In case you used the scanner's internal memory to store your documents, power on the scanner and connect it to your computer.
- Open the **Cardiris** interface. A window will open, prompting you to load the images from your IRIScan/Card Anywhere scanner.
- Select the images you want to load and click **Open**.



- The data on the card will be recognized and assigned to the different data fields.

Note: the country of the business cards is set to **United States** by default. To change the country, click the globe button on the main toolbar before loading the business cards.

Loading images at a later time

- Click the **Load & Create** button on the main toolbar.
- Browse for the images you want to load.

SCANNING THE REVERSE SIDE OF A CARD

Often business cards contain important additional information on the reverse side, such as personal cell phone numbers, company logos, etc. Therefore Cardiris offers the possibility to scan both the front and reverse side of a card and to store the information under the same contact.

Operation

- Select the card of which you want to scan the reverse side by clicking on it.
- Select the **Back** tab in the toolbar menu.



The selected tab is highlighted in dark gray.

- Click the **Scan/Open Image** button to scan the reverse side.



Note that the reverse side of a card is only scanned, and not recognized. Drag-and-drop operations are available, however, to execute drag-and-drop OCR.

Make sure to click the **Scan/Open image** button to scan the reverse side of a card. Clicking the **Scan/Open & Create** button in the vertical toolbar will scan the reverse side as a **new** business card.

SCANNING A PHOTO OF A CONTACT

Next to textual information about your contacts, Cardiris allows you to include their photo.

Operation

- Select the card you want to add a photo to in the card toolbar.
- Select the **Photo area** by clicking on it.



- Click the **Scan Image** button.

RECOGNIZING CARDS WITH DRAG-AND-DROP OCR

In case you need just part of the data on a business card, you can recognize the card with drag-and-drop OCR.

Draw a frame around the information you need and drag that frame with your mouse to the dedicated field. The recognition is executed and the data is placed in the selected field.

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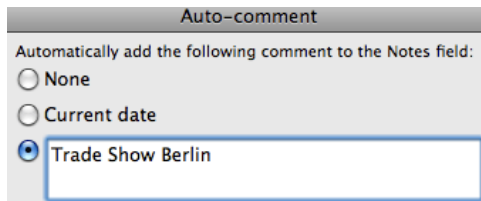
ADDING COMMENTS TO CARDS

The **auto-comment** function allows you to add comments to series of business cards.

Operation

- Go to the **Settings** menu.
- Click the option **Auto-comment**.

You can either add the **current date** or your **personal comment** to the business cards.



Auto-comment

Automatically add the following comment to the Notes field:

☐ None

☐ Current date

☒ Trade Show Berlin

You can enter a maximum of 250 characters.

- The comment will be added to the **Note field** of each card you scan.

EDITING RECOGNIZED CARDS

The information recognized by Cardiris can be edited in several ways.

Data Fields

Unrecognized characters are represented by a tilde.

Any data the OCR process cannot assign to a specific field is placed in the **Note** field.

Don't hesitate to add manually entered comments to the **Note** field.

Text Editing

- The command **Undo** undoes cut, copy, paste, clear and crop operations.
- The command **Cut** transfers the selected data to the clipboard.
- The command **Copy** copies the selected data to the clipboard.
- The command **Paste** inserts the data contained in the clipboard.
- The command **Clear** erases the selected data.
- The command **Remove from Group** removes the selected card from the database group.
- The command **Select All** selects all text in the current data field.

When you re-execute the OCR, Cardiris erases all data and fills them out again.

Drag-and-drop Editing

Drag-and-drop operations allow to edit the recognized data with great comfort.

They are particularly useful when mixed data was put in the **Note** field and has to be transferred to different fields.

To move data to another field, select the data with the mouse and drag it to the target field. Release the mouse button when the cursor is in the right position.

Drag-and-drop operations add data to a field at the selected cursor position. The data of the target field is *not* erased.

Selecting Text

When the text cursor is placed in a database field, the command **Select All** selects all text in that field.

Normally, this command selects all cards.

You can delete, move, rotate and export all cards simultaneously.

Deleting Cards

The command **Clear** erases the selected card(s).

Another way to delete cards, is selecting them in the card toolbar and dragging them to the trash can of the toolbar.



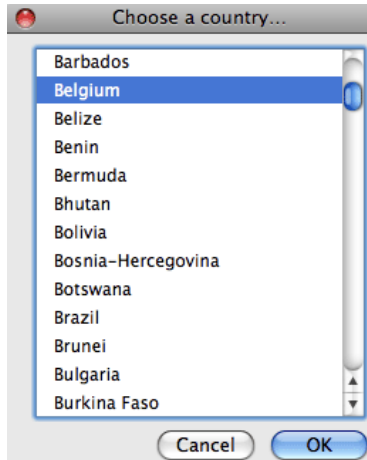
When a single card is loaded into memory, deleting it closes the current series of business cards.

RE-RECOGNIZING BUSINESS CARDS

Should you have forgotten to select the proper country, just re-execute the OCR.

Operation

- Select the card(s) in the **card toolbar**.
- **Ctrl-click** one card and select another **country**.



The recognition and field analysis get redone for all selected cards; Cardiris erases all data and fills them out again.

SAVING CARDS IN THE CARDIRIS DATABASE

As soon as you have scanned your business cards they can be saved in the Cardiris database.

Note that business cards scanned as **Image** cannot be stored in the database.

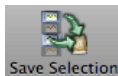
Operation

You can either **save all** the cards you scanned or a **selection** of cards.

- Click the **Save All** button to store **all** scanned cards in the Cardiris database/Apple Address Book.



- Click the **Save Selection** button to store a **selection** of cards in the Cardiris database/Apple Address Book.



When a contact already exists in the database - that is when the first and last name of the contact are the same - you are prompted whether to replace the existing contact.

You can also save all scanned cards automatically in the Cardiris database/Apple Address Book.

Operation

- Open the **Cardiris** menu and click **Preferences**
- Select the option **Automatically save all acquired cards to the AddressBook.**

When you're scanning many business cards you can create a new group of contacts in the database. Click the **New Group** command under the **File** menu to do so.

To create a new group automatically, select the corresponding option in the **Preferences** menu: **Create a new Address Book group when saving cards**.

SYNCHRONIZING CONTACTS

The free Apple **iSync** software allows you to synchronize your contacts across Mac computers and other devices - iPod or Palm OS hand-held computers and (Bluetooth compatible) mobile phones.



Operation

- Go to **Preferences** under the Cardiris menu.
- Select the option **Use iSync to synchronize addresses**.

When you save contacts in the Cardiris database, iSync synchronizes them across Mac computers and other devices - Apple iPod or Palm OS hand-held computers and (Bluetooth compatible) mobile phones.



Make sure to disable this option when you edit the recognition results inside the contact manager. Otherwise you'll find yourself transferring contacts that haven't been validated yet.

To store contacts manually on an Apple iPod, use a PDA as external hard disk and drag the vCard file(s) to the folder **Contacts**.

FORMATTING RECOGNIZED CARDS

Before recognized cards can be exported, their **output format** must be specified.

Business cards can be saved in three different output formats: in **vCard** files, **Unicode** files and **HTML** files.



vCard files

The output format is set to **vCard files** by default.

vCard files can also be swiftly imported into any vCard compliant application e.g. Microsoft Entourage.

Select the option **Send to - Add Application** to define target applications that were not preprogrammed.

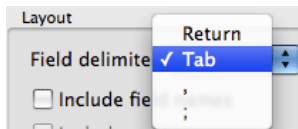
Use this option to send contacts to your mail software for instance. A new e-mail message will be opened and the vCard file will be added as attachment.

Scanned cards can also be exported instantly by means of drag-and-drop operations. One vCard file per card is created on the Desktop. Double-click the vCard file to add the contacts to the Apple Address Book.

Unicode files

A very practical target application for unicode files is Microsoft Excel. The different data fields of Cardiris are converted into columns containing the correct information about your contacts.

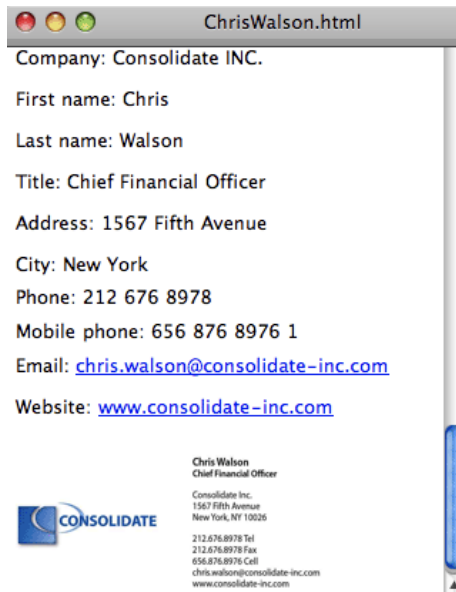
- Change the output format to **Unicode** to save contacts as a **structured text file**.
- Select the appropriate **field delimiter** to separate the various database fields.



- Click the option **Include field names** to add the name of each data field in front of the actual data.

HTML files

Exporting scanned cards to **HTML files** allows to create data sheets containing both the recognized data and the card logo. That way the business cards are archived electronically.



- Change the output format to **HTML**.
- Click the option **Include field Names** to add the name of each data field in front of the actual data.
- Click the option **Include card images** to store the card image in the HTML file.

Note that you must always click the **Export** button to export the cards.



Note that you can export contacts several times and in several formats. Just change the output format and click the **Export** button again.

Use the **iSync** option to **synchronize** your contacts across several devices automatically.

EXPORTING RECOGNIZED CARDS

Once you have scanned your business cards, they are available for export. They can be sent to databases, contact managers, personal information managers (PIM), word processors, spreadsheets etc.

Operation

- Before exporting the cards, you must first choose the output format.
- Export **all** cards by clicking the **Export** button.



- Or export a selection of cards:
 - Click a card to select it.
 - Select the first card and hold the **Shift key** to select a continuous range of business cards.
 - Select the first card and hold the **Cmd key** to select extra business cards.
 - Click the command **Export Selected Cards** under the **Process** menu.

You can also export recognized business cards instantly by dragging their image from the card toolbar to the desktop. A vCard file is created on the fly. If you selected several contacts, one vCard file is created per contact.



To store the contacts on an Apple iPod, use the PDA as external hard disk and drag the vCard files to the folder **Contacts**.



CHAPTER 5

SCANNING IMAGES

SCANNING AND SAVING IMAGES

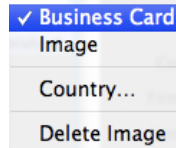
- Click **Preferences** under the **Cardiris** menu to select the appropriate scanning mode.

Cardiris supports black-and-white, grayscale and color images.

- Select **Image** as document type.



Ctrl-click an image in the card toolbar to change its document type.



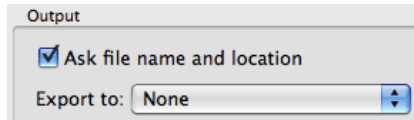
- Select your **output target**.



Cardiris supports the following image formats: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

By default the option **Ask file name and location** is checked. The user is prompted to save the scans in external files.

- Choose the target explication in the **Export to** menu.



The **Export to** feature offers a direct link between your scanner and your Mac OS photo editing applications. When no target application is chosen, the images will be sent to the standard Mac OS application **Preview**.



- Click the **Export** button to export your scans.

You can export scanned images instantly by dragging them from the card toolbar to the desktop. The JPEG images are created on the fly.

CHAPTER 6

SCANNING CARDS

USING THE BUTTON MANAGER

(This section does not apply to Cardiris delivered with your IRIScan Anywhere scanner)

With the Button Manager you can scan business cards and export them instantly as images without having to use the Cardiris software.

Operation

- Select the **Button Manager** icon in the **Dock** or in the **Applications** menu.

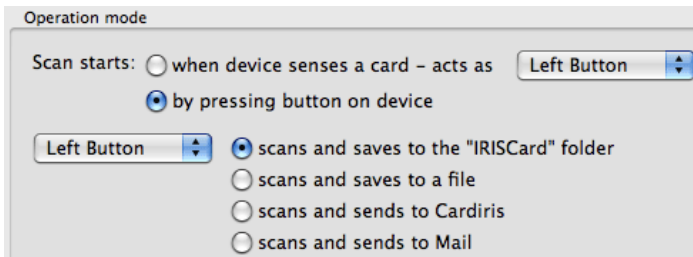


Note that the Button Manager and the scanner buttons on the IRISCard Pro are disabled when the scan source of the Button Manager and the scan source of Cardiris are set to the same scanner. Notice the padlock on the Button Manager icon.



As soon as you exit Cardiris or set its source to **File** or a different scanner type, the Button Manager is available.

- Go to **Preferences** in the **Button Manager** menu to specify the settings and to choose the scanning mode you want to use.



By means of the **Button Manager** you can either scan cards:

- **automatically** when the scanner senses a card, or;
- **manually** by means of the scanner buttons.

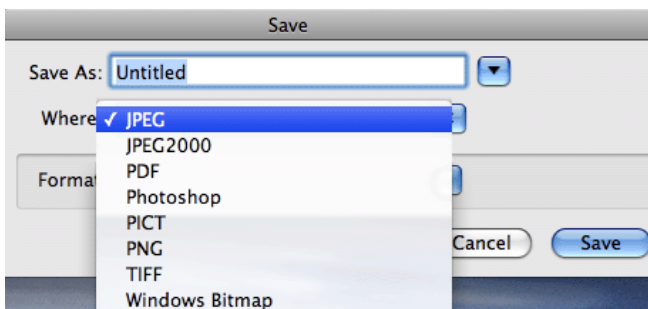
To each of the two scanner buttons, one of four actions can be assigned:

- scan the card and save the image to the **IRISCard** folder (inside the **Documents** folder);

The image will be stored as a JPEG file.

- scan the card and save the image to a file;

You are prompted to save the card image in any of the common photo viewing applications.



- scan the card and send it to Cardiris;

The Cardiris program opens automatically.

- scan the card and send it by e-mail.

A new e-mail message, containing the card image, opens automatically.

CHAPTER 7

REFERENCE INFORMATION

HORIZONTAL TOOLBAR

Rotate

By default Cardiris applies automatic card orientation detection.

You can also rotate images manually.

Operation

Click the **Rotate** icon to rotate the selected cards 90° to the right, 90° to the left and 180°.



The recognition is re-executed automatically after the rotation.

Crop

The **Crop** button allows you to crop scanned cards and images manually: just draw a frame around the card image and click the button.



Note that the recognition is re-executed when you crop manually.

Magnifying Glass

Click the **Magnifying Glass** button on the toolbar and drag the mouse over the card image to enable the magnifying glass.



OR

Shift-click the mouse button to display the magnifying glass.

Front - Back Tab

Often business cards contain important additional information on the reverse side, such as personal cell phone numbers, company logos, etc. Therefore Cardiris offers the possibility to scan both the front and reverse side of a card and to store the information under the same contact.

Operation

- Select the card of which you want to scan the reverse side by clicking on it.
- Select the **Back** tab in the toolbar menu.



The selected tab is highlighted in dark gray.

- Click the **Scan/Open Image** button to scan the reverse side.



Note that the reverse side of a card is only scanned, and not recognized. Drag-and-drop operations are available, however, to execute drag-and-drop OCR.

Make sure to click the **Scan/Open image** button to scan the reverse side of a card. Clicking the **Scan/Open & Create** button in the vertical toolbar will scan the reverse side as a **new** business card.

Scan/Open/Load Image Button

Often business cards contain important additional information on the reverse side, such as personal cell phone numbers, company logos, etc. Therefore Cardiris offers the possibility to scan both the front and reverse side of a card and to store the information under the same contact.

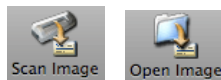
Operation

- Select the card of which you want to scan the reverse side by clicking on it.
- Select the **Back** tab in the toolbar menu.



The selected tab is highlighted in dark gray.

- Click the **Scan/Open Image** button to scan the reverse side.



Note that the reverse side of a card is only scanned, and not recognized. Drag-and-drop operations are available, however, to execute drag-and-drop OCR.

Make sure to click the **Scan/Open image** button to scan the reverse side of a card. Clicking the **Scan/Open & Create** button in the vertical toolbar will scan the reverse side as a **new** business card.

Note: when an **IRISCard Anywhere 4** or **IRIScan Anywhere 2** scanner is connected to your computer, or one of its storage devices is inserted, the **Load Image** button is displayed, instead of the **Scan/Open Image** buttons.



Save All Button

Once you have scanned your business cards they can be **saved** in the Cardiris database.

Operation

- Click the **Save All** button in the toolbar to store all scanned cards in the Cardiris database.



OR

- Click the **Save All Cards** command in the **File** menu.

All the cards will be stored and sent to Apple **Address Book**.

When a contact already exists in the Address Book, you are prompted whether you want to replace it or not.

Note that the **Save All** button and **Save All Cards** command are disabled when you select **Image** as document type.

You can also save a selection of cards.

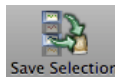
Note that you can also save scanned cards automatically by selecting the option **Automatically save all acquired cards to the AddressBook** in the **Preferences** menu.

Save Selection Button

Once you have scanned your business cards they can be **saved** in the Cardiris database.

Operation

- **Select the cards you want to save** by clicking on them and holding the ctrl-key.
- Click the **Save Selection** button in the toolbar to store a selection of scanned cards in the Cardiris database.



OR

- Click the **Save Selected Cards** command in the **File** menu.

The selection of cards will be stored and sent to Apple Address Book.

When a contact already exists in the Address Book, you are prompted whether you want to replace it or not.

Note that the **Save Selection** button and **Save Selected Cards** command are disabled when you select **Image** as document type.

Customize

The **Customize** button allows you to determine the toolbar style. You can add and remove buttons, change their location on the toolbar and determine the button style.

Operation

- Click the **Customize** button.



- Add buttons to the toolbar by selecting them in the button list and dragging them to the toolbar.
- Remove buttons from the toolbar by dragging them to the button list.
- You can also determine the look of the toolbar: choose to display **Icons & Text**, **Icons only** or **Text only**.



VERTICAL TOOLBAR

Scan & Create - Open & Create

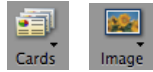
Depending on the input source, the buttons **Scan & Create** or **Open & Create** will be displayed in the interface.

Scan & Create

- The **Scan & Create** button will be displayed when the source is set to a **scanner**.



- Select the **document type** in which you want the card to be scanned.



- Click the **Scan & Create** button to scan cards.

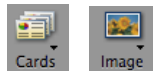
Note: in case you have chosen the document type **Business cards**, make sure to select the card style before scanning. The recognition is automatic.

Open & Create

- The **Open & Create** button will be displayed when the source is set to **File**.



- Select the **document type** in which you want the prescanned file to open.



Note: in case you have chosen the document type **Business card**, make sure to select the card style before scanning. The recognition is automatic.

Cardiris **deskews** and **crops** all scanned business cards automatically.

Cardiris opens black-and-white, grayscale and color images.

Cardiris supports the following image formats GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PNG, Quicktime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

Load & Create

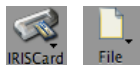
When an **IRISCard Anywhere 4** or **IRIScan Anywhere 2** scanner is connected to your computer, or one of its storage devices is inserted, the **Load & Create** button is displayed in the interface.

Click the **Load & Create** button to load your IRISCard/IRIScan Anywhere images.



Scanner Type - File

Depending on the source input the **Scanner icon** or **File icon** will be displayed in the toolbar.



Scanner

Select your scanner model - the scanner has to be connected to your computer and ready to use.

File

When you select **File** as input source, the **Open & Create** button allows you to open prescanned cards.

Document Type - Business cards

Before you start to scan cards, you must first select the **document type**.

Cards can either be scanned as **Business cards** or as **Image**.

When you scan cards as **Business cards**, the data on the cards will be recognized and assigned to the designated data fields.

Operation

- Click the **document type** icon to select it.



Note: the document type is set to **Business cards** by default.

- In order to change the document type of a scanned card: **ctrl-click** the card and select the other document type.

Note: in case you're using a flatbed scanner, you can scan several cards simultaneously on the flatbed and have them split up by the software. The background must be black if Cardiris is to extract the various business cards.

Document Type - Image

Before you start to scan cards, you must first select the **document type**.

Cards can either be scanned as **Business cards** or as **Image**.

When you scan cards as **Images**, the data on the card will not be recognized but the **card image** will be opened in Cardiris.

Operation

- Click the **document type** icon to select it.



Note: the document type is set to **Business cards** by default.

- In order to change the document type of a scanned card: **ctrl-click** the card and select the other document type.

Cardiris supports black-and-white, grayscale and color images.

Cardiris also supports the following image formats: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

Scanned images are available for export to your Mac OS photo editing applications.

Card Style

The style and layout of business cards differ from one country to another. In order for Cardiris to recognize data on a card, you must first specify the **card style**.

Operation

Click the globe icon to set the **card style**.



Based on the selection of a **country**, Cardiris knows which **language** to recognize.

Note that the globe icon is disabled when the document type is set to **Image**.

Note that some card styles correspond to several languages. Canada has two official languages, Switzerland and Belgium have three. Cardiris detects the selected language automatically.

Output Format - Cards

Before recognized cards can be exported, their **output format** must be specified.

Business cards can be saved in three different output formats: in **vCard** files, **Unicode** files and **HTML** files.



vCard files

The output format is set to **vCard files** by default.

vCard files can also be swiftly imported into any vCard compliant application e.g. Microsoft Entourage.

Select the option **Send to - Add Application** to define target applications that were not preprogrammed.

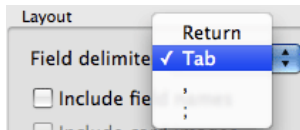
Use this option to send contacts to your mail software for instance. A new e-mail message will be opened and the vCard file will be added as attachment.

Scanned cards can also be exported instantly by means of drag-and-drop operations. One vCard file per card is created on the Desktop. Double-click the vCard file to add the contacts to the Apple Address Book.

Unicode files

A very practical target application for unicode files is Microsoft Excel. The different data fields of Cardiris are converted into columns containing the correct information about your contacts.

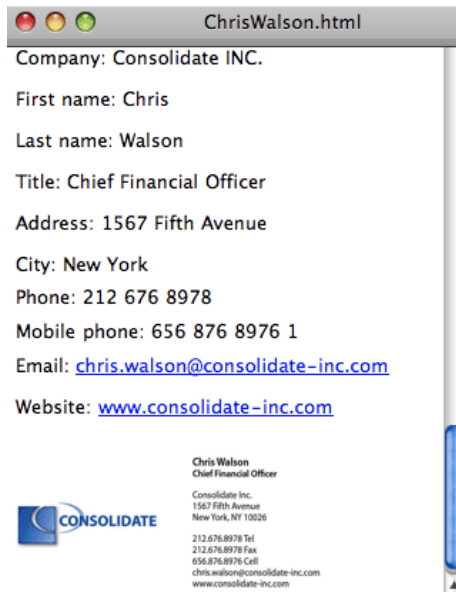
- Change the output format to **Unicode** to save contacts as a **structured text file**.
- Select the appropriate **field delimiter** to separate the various database fields.



- Click the option **Include field names** to add the name of each data field in front of the actual data.

HTML files

Exporting scanned cards to **HTML files** allows to create data sheets containing both the recognized data and the card logo. That way the business cards are archived electronically.



- Change the output format to **HTML**.
- Click the option **Include field names** to add the name of each data field in front of the actual data.
- Click the option **Include card images** to store the card image in the HTML file.

Note that you must always click the **Export** button to export the cards.



Note that you can export contacts several times and in several formats. Just change the output format and click the **Export** button again.

Use the **iSync** option to **synchronize** your contacts across several devices automatically.

Output Format - Image

Before images can be exported, their **output format** must be specified.

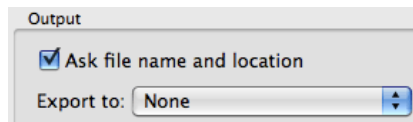
Operation

- Click the **output format** icon to select the output format.



Note: the output format is set to **Tiff** by default.

- By default the option **Ask file name and location** is checked. The user is prompted to save the scans in external files.



- The **Export to** feature offers a direct link between your scanner and your Mac OS photo editing applications. When no target application is chosen, the images will be sent to the standard Mac OS application **Preview**.



Cardiris supports the following image formats: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

Export - Cards

Once you have scanned your business cards they are available for export.

First choose the output format you want to use, then click **Export**.



All the cards will be sent to the application of your choice.

In case you only need to export a selection of cards, click the button **Export Selected Cards** under the **Process** menu.

You can also drag their image from the card toolbar to the desktop. A vCard file per contact will be created on the fly.

Export - Image

Once you have scanned the card images they are available for export.

First choose the output format, then click the **Export** button.



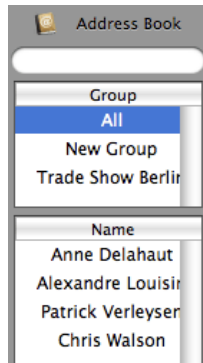
All the card images will be sent to the application of your choice.

In case you only need to export a selection of cards, click the button **Export Selected Cards** under the **Process** menu.

You can also drag their image from the card toolbar to the desktop. A JPEG file per contact will be created on the fly.

Address Book

Cards that are saved in the Cardiris database are also stored in the Apple **Address Book**. In fact both applications are one and the same.



Operation

- Click the **Save All** or **Save Selection** button to store the scanned cards in the database.
- Or use the **Save All Cards** or **Save Selected Cards** command under the **File** menu.

When a contact already exists in the Address Book, you are prompted whether you want to replace it or not.

You can also save cards automatically in the **Address Book**.

Operation

- Open the **Cardiris** menu and click **Preferences**.
- Select the option **Automatically save all acquired cards to the AddressBook**.

When you are scanning numerous series of cards, you can create a new contact group for each series.

Operation

- Go to the **File** menu and click **New Group**.
- **Ctrl-click** the group to rename it.
- Select the group you want to store your contacts in and click **Save All** or **Save Selection**.

You can also create a new AddressBook group automatically.

Operation

- Open the **Cardiris** menu and click **Preferences**.
- Select the option **Create a new AddressBook group when saving cards**.
- A new group will be created, using the **current date** as name.

You can search contacts in the database by means of the search window.

You can delete contacts or entire groups by dragging their image to the trash can icon of the program.

Synchronize contacts in the Address Book by means of iSync.

CARD TOOLBAR

Selecting Cards

The current card is highlighted.

- Click a card to select it.
- Select the **document type** of the selected card. You can choose between **Business Card** and **Image**.
- Select the first card and hold the **Shift key** to select a continuous range of business cards.
- Select the first card and hold the **Cmd key** to select **extra business cards**.
- Use the command **Select All** to select all cards.

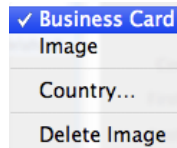
You can delete, move, rotate and export the selected cards simultaneously.

You can re-execute the recognition of the selected cards.

Changing the Document Type

You can change the document type of the selected cards simultaneously.

Ctrl-click the selected cards and select the other document type.



Changing the Card Style

You can change the card style of the selected cards simultaneously.

Ctrl-click the selected cards and select another country.

The recognition is re-executed for the selection of cards.

Browsing the Cards

Click the **up-arrow** and **down-arrow** to go the **previous** and **next card** respectively.

Click **Home** and **End** to go the **first** and **last card** respectively.

You can export the selected cards instantly by dragging their image from the card toolbar to the desktop. A vCard file is created on the fly per contact.

Drag cards to another location in the card toolbar in case you need to change the order of the cards.

Deleting Cards

To delete one or several cards, drag their image to the trash can of Cardiris.

OR

Ctrl-click one or several cards and select **delete image** to delete the card image only.

APPLICATION WINDOW

Image



The card image of the selected card is displayed in the image window.

By default Cardiris crops the scanned card automatically. You can also crop manually, however, by means of the **Crop** button.

Use drag-and-drop operations to move information to specific data fields.

Use the **Rotate** button to rotate the card image.

Use the **Magnify** button to magnify parts of the card.

Use the **Back** tab to view or scan the reverse side of the card.

To delete the card image, **ctrl-click** the card in the card toolbar and select **Delete Image**.

Status Bar

Progress Info

The status bar displays the system progress.

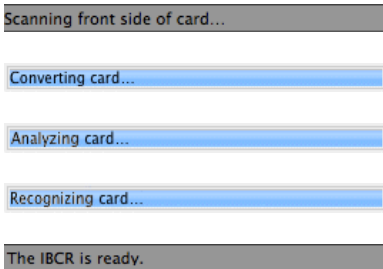
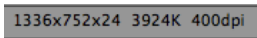


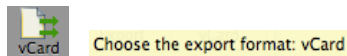
Image Info



Displays the image size (in image pixels and in KB), the image type (bit depth) and the image resolution of the current image.

Tooltips

Hold your mouse pointer over a button: the status bar displays its **tooltip**.



Data Fields

The recognized information is sent to the appropriate **data fields**.

Unrecognized characters are represented by a tilde.

Any data the OCR process cannot assign to a specific field is placed in the **Note** field.

You can also add personal comments to the **Note** field.

The information in the data fields can be edited by means of **text editing** and **drag-and-drop editing**. Drag-and-drop operations are particularly useful when mixed data was put in the **Note** field and has to be transferred to other fields:

- To move data to another field, select the data with the mouse and drag it to the target field.
- Drag-and-drop operations add data to a field at the selected cursor position. The data of the target field is *not* erased.

Note: when the text cursor is placed in a database field, the command **Select All** selects all text in that field. Normally, this command selects **all cards**.

Photo Field

Next to textual information about your contacts, Cardiris allows you to include their photo.

Operation

- Select the card you want to add a photo to in the card toolbar.
- Select the **Photo area** by clicking on it.



- Click the **Scan Image** button.

CARDIRIS MENU

About Cardiris

Displays the Cardiris startup screen with the copyright notices. Click to make it disappear or click www.irislink.com to get access to the I.R.I.S. home page.

Preferences

Scanner

- Select your **scanner** model - the scanner has to be connected to your computer and be ready to use.
- Cardiris supports almost every business card scanner, flatbed scanner and all-in-one MFP (Multifunctional Peripheral) scanner. Cardiris is Twain compliant.
- You'll find information on scanner setup in the **ReadMe file**. Refer to this file if you experience any problems with your scanner, and consult the hardware documentation that came with it.
- To open prescanned business cards, select the **File** option.



Scanning Resolution

The resolution can be set to 300, 400 and 600 dpi. It is recommended to use a scanning resolution of 400 dpi to read business cards successfully.

Note that this is not the standard scanning resolution of a Twain scanner.

Calibrate

Insert the calibration sheet and click the **Calibrate** button to calibrate the scanner.

Format

You can either choose an **automatic** or **custom** scanning format, or you can opt for the **Business Card format** in which the scanning dimensions are set to **8.89 cm x 5.08 cm**.

When you're using the I.R.I.S. Business card scanners **IRISCard Pro 4** or **IRISCard Mini** it is recommended to use the **automatic** format. Cardiris applies autocropping to reduce the scanned surface to the calling card. White space around the business card is erased automatically to obtain the smallest possible images that are optimally legible.



Select the **custom** format when you're scanning prescanned images. Automatic deskewing will not apply here.

Color Mode

Cardiris supports black-and-white, grayscale and color images.

Scan settings of the IRISCard Pro 4 and IRISCard Mini

- Select a scanning resolution of 400 dpi.

- Select the format **Automatic**. Cropping of the card image is applied automatically.

The software prompts you to **calibrate** the IRISCard Pro 4 and IRISCard Mini when you're using it for the first time. Insert the white calibration card supplied with your business card scanner and follow the on-screen instructions.

Scan Settings of Other Scanner Models

The scanner settings - color mode, resolution, page format and orientation, brightness and contrast - are set inside the **Twain module**.

Other Options

- The option **Brushed-metal user interface** is selected by default. Uncheck it to create a white user interface.
- A **uniform case** is applied to the recognized fields by default.
- You can **save all acquired cards automatically to the AddressBook** by clicking the corresponding option.
- The **Preferences** menu offers you the possibility to create a new Address Book group when saving cards.
- Click the **iSync** option to synchronize addresses across your Mac devices.
- The **Preferences** menu offers you the possibility to **delete files** that have been saved to the AddressBook **from the IRISCard folder**.

Quit Cardiris

Quits the Cardiris software.

FILE MENU

The **File** menu allows you to scan new business cards and open prescanned ones.

New Card

This command adds a new untitled card to the card toolbar.

You are ready to scan or open a new series of business cards.

New Group

This command adds a new Address Book group to the contact list.

Ctrl-click the new group to rename it.

Scan/Open & Create New Cards

Depending on the input source (scanner or file) the command **Scan & Create New Cards** or **Open & Create New Cards** is displayed.

- **Scan & Create New Cards** scans new business cards.
- **Open & Create New Cards** opens black-and-white, grayscale and color images of prescanned business cards.

Save All Cards

This command saves all cards to the Cardiris database.

Save Selected Cards.

This command saves a selection of cards to the Cardiris database.

EDIT MENU

These commands mainly concern **text editing** in the **database fields**.

Text Editing

- The command **Undo** undoes cut, copy, paste, clear and crop operations.
- The command **Cut** transfers the selected data to the clipboard.
- The command **Copy** copies the selected data to the clipboard.
- The command **Paste** inserts the data contained in the clipboard.
- The command **Clear** erases the selected data.
- The command **Remove from Group** removes the selected card from the database group.
- The command **Select All** selects all text in the current data field.

SETTINGS MENU

Document Type - Business Cards

Before you start to scan cards, you must first select the **document type**.

Cards can either be scanned as **Business Cards** or as **Image**.

Operation

- Go to the **Settings** menu, click **Document Type** and select **Business Cards**.

Only when the document type **Business cards** is selected, will the data on the card be recognized and assigned to the appropriate data fields.

Note: the document type is set to **Business cards** by default.

- In order to change the document type of a scanned card: **ctrl-click** the card and select **Image** as document type.

Note: in case you're using a flatbed scanner, you can scan several simultaneously on the flatbed and have them split up by the software. The background must be black if Cardiris is to extract the various business cards.

Document Type - Images

Before you start to scan cards, you must first select the **document type**.

Cards can either be scanned as **Business Cards** or as **Image**.

When you scan cards as **Images**, the data on the card will not be recognized but the **card image** will be opened in Cardiris.

Operation

- Go to the **Settings** menu, click **Document Type** and select **Image**.
- In order to change the document type of a scanned card: **ctrl-click** the card in the card toolbar and select **Business cards** as document type.

Cardiris supports black-and-white, grayscale and color images.

The following image formats are supported by Cardiris: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP).

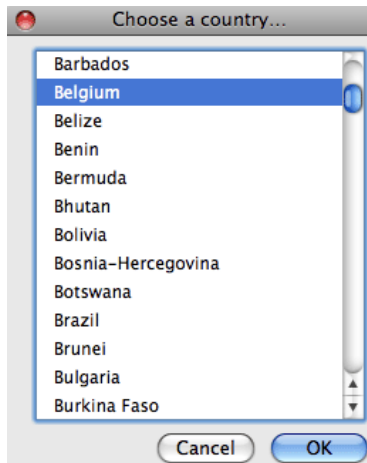
Scanned images are available for export to your Mac OS photo editing applications.

Country

The style and layout of business cards differ from one country to another. In order for Cardiris to recognize data on a card, you must first specify the **card style**.

Operation

Click the **Country** command to set the **card style**.



Based on the selection of a country, Cardiris knows which language to recognize.

Note that the **Country** command is disabled when the document type is set to **Image**.

Note that some card styles correspond to several languages. Canada has two official languages, Switzerland and Belgium have three. Cardiris detects the selected language automatically.

Output Format

Before recognized cards can be exported, their **output format** must be specified.

Output Format – Business Cards

Business cards can be saved in three different output formats: in **vCard** files, **Unicode** files and **HTML** files.



vCard files

The output format is set to **vCard files** by default.

vCard files can also be swiftly imported into any vCard compliant application e.g. Microsoft Entourage.

Select the option **Send to - Add Application** to define target applications that were not preprogrammed.

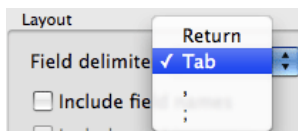
Use this option to send contacts to your mail software for instance. A new e-mail message will be opened and the vCard file will be added as attachment.

Scanned cards can also be exported instantly by means of drag-and-drop operations. One vCard file per card is created on the Desktop. Double-click the vCard file to add the contacts to the Apple Address Book.

Unicode files

A very practical target application for unicode files is Microsoft Excel. The different data fields of Cardiris are converted into columns containing the correct information about your contacts.

- Change the output format to **Unicode** to save contacts as a **structured text file**.
- Select the appropriate **field delimiter** to separate the various database fields.



- Click the option **Include field names** to add the name of each data field in front of the actual data.

HTML files

Exporting scanned cards to **HTML files** allows to create data sheets containing both the recognized data and the card logo. That way the business cards are archived electronically.



- Change the output format to **HTML**.
- Click the option **Include field names** to add the name of each data field in front of the actual data.
- Click the option **Include card images** to store the card image in the HTML file.

Note that you must always click the **Export** button to export the cards.

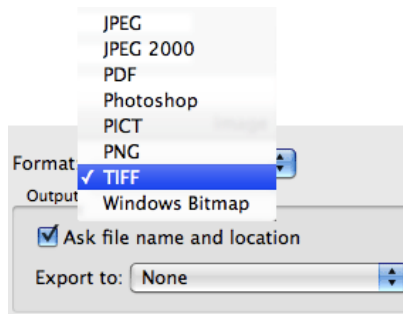


Note that you can export contacts several times and in several formats. Just change the output format and click the **Export** button again.

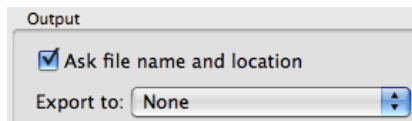
Use the **iSync** option to **synchronize** your contacts across several devices automatically.

Output Format - Images

- Select the **output target**.



- By default the option **Ask file name and location** is checked. The user is prompted to save the scans in external files.
- Choose the **target application** in the **Export to** menu.



- The **Export to** feature offers a direct link between your scanner and your Mac OS photo editing applications. When no target application is chosen, the images will be sent to the standard Mac OS application **Preview**.



Cardiris supports the following image formats: GIF, JPEG, JPEG 2000, MacPaint, Photoshop, PICT, PNG, QuickTime, TIFF (uncompressed, packbits and Group 3 compressed), multipage TIFF and Windows bitmap (BMP) images.

Note that you must **always** click the **Export** button to export the cards.



Note that you can export contacts **several times** and in **several formats**. Just change the output format and click the **Export** button again.

Card Orientation Detection

By default Cardiris detects the card orientation automatically and rotates the image when needed.

The **Card Orientation** option determines whether cards which were scanned at a 90°, 180° or 270° angle, will be rotated left, right or turned upside down automatically before the recognition begins.

Detecting the card orientation takes some time, however. Leave this option disabled when you are sure no image rotation is required.

To **disable** automatic card orientation:

- Go to the **Settings** menu
- Uncheck the option **Card Orientation Detection**

Should you still need to rotate an image, use the manual rotation button.



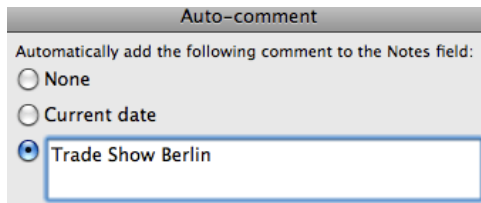
Auto-comment

The **auto-comment** function allows you to add comments to series of business cards.

Operation

- Go to the **Settings** menu.
- Click the option **Auto-comment**.

You can either add the **current date** or your **personal comment** to the business cards.



You can enter a maximum of 250 characters.

- The comment will be added to the **Note field** of each card you scan.

VIEW MENU

Back Side - Front Side

The **Back Side - Front Side** command flips the business cards and enables you to scan or view the reverse side of a card.

Note that this command is disabled when the document type **Image** is selected.

Rotate

The **Rotate** command allows you to rotate selected cards 90° to the right, 90° to the left and 180°.

Note that Cardiris detects the card orientation automatically by default.

Crop

The **Crop** command allows you to crop scanned cards and images manually: just draw a frame around the card image and click the **Crop** command.

Note that the recognition is re-executed when you crop manually.

Revert

The **Revert** command allows you to undo crop operations.

Magnifying Glass

Click the **Magnifying Glass** command and drag the mouse over the card image to enable the magnifying glass.

OR

Shift-click the mouse button to display the magnifying glass.

Customize Toolbar

The **Customize Toolbar** command allows you to determine the toolbar style. You can add and remove buttons, change their location on the toolbar and determine the button style.

- Click the **Customize Toolbar** command.
- Add buttons to the toolbar by selecting them in the button list and dragging them to the toolbar.
- Remove buttons from the toolbar by dragging them to the button list.
- You can also determine the look of the toolbar: choose to display **Icons & Text**, **Icons only** or **Text only**.



PROCESS MENU

Calibrate Scanner

The software prompts you to calibrate the **IRISCard Pro 4** or **IRISCard Mini** when you're using it for the first time.

Operation

- Click the command **Calibrate Scanner**
- Insert the white **calibration card** supplied with your business card scanner.
- Click **Calibrate**.

You can re-calibrate the scanner at any other time by repeating this process.

Change Selected Cards - Business Card

In order to recognize information on business cards and process it correctly, the business card reading mode must be activated. To activate it, select the document type **Business cards** in the vertical toolbar.

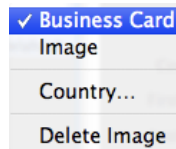
When the document type is set to **Image** the card will only be scanned and the data on it will not be processed.

To change the document type:

- Go to the **Process** menu and click the command **Change Selected Cards**.
- Select **Business Card** as document type. The business card reading mode is enabled and the recognition will be executed.

OR

- **Ctrl-click** a card, or a selection of cards and select **Business Card** as document type.



Change Selected Cards - Image

Set the document type to **Image** in case you want Cardiris to recapture small pictures (photos, head shots etc.)

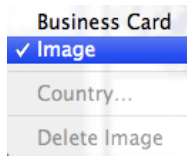
To change the document type:

- Go to the **Process** menu and click the command **Change Selected Cards**.

- Select **Image** as document type. The card image will be displayed and the database fields will be removed.

OR

- **Ctrl-click** a card, or a selection of cards and select **Image** as document type.

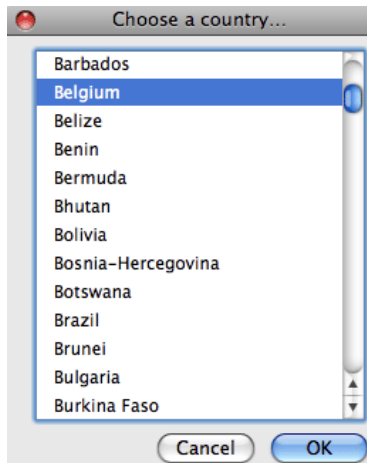


Change Selected Cards - Country

Should you have forgotten to select the proper country, just re-execute the OCR.

Operation

- Select the option **Change Selected Cards** in the **Process** menu.
- Click the **Country** command and select the appropriate country.



- The OCR will be re-executed.

Change Selected Cards - Delete Image

The **Delete Image** command deletes the image of the scanned card. The card information assigned to the database field is not deleted, however.

Click the **Open Image** or **Scan Image** command on the toolbar to insert a new card image. The recognized data will not be changed.

Note that when the document type is set to **Image**, the **Delete Image** command is disabled for safety reasons: if you were to click the **Delete** command, the entire card would be removed and would have to be re-scanned.

Scan/Open this Side of the Card

Often business cards contain important information on the reverse side such as private cell phone numbers, company logos etc. Therefore Cardiris offers the possibility to scan both the front and

reverse side of a card and store that information under the same contact.

Operation

- Select the card side you want to scan by means of the **Front - Back tabs** on the toolbar.



- Go to the **Process** menu and click **Scan/Open this side of the card**.

Note: when you set the **scan source** to **IRISCard**, the command will be displayed as **Scan this side of the card**.

In case you set the scan source to **File**, the command will be displayed as **Open this side of the card**.

- Or click the **Scan/Open Image** button. The new card side will be scanned or opened.

Note that the new card side will only be scanned, not recognized. The information in the data fields will not be changed.

You can also execute drag-and-drop OCR on the new card side in case you need only part of the data.

Export All Cards

Once you have scanned your business cards, they are available for export. They can be sent to databases, contact managers, personal information managers (PIM), word processors, spreadsheets etc.

Operation

- Before exporting the cards, you must first choose the output format.

- Click the **Export All Cards** command to export **all** cards.
- The cards will be sent to the application of your choice, which opens automatically.

Tip: You can also click the **Export** button on the toolbar to export all cards.



Tip: it is also possible to export a selection of cards.

Export Selected Cards

Once you have scanned your business cards, they are available for export. They can be sent to databases, contact managers, personal information managers (PIM), word processors, spreadsheets etc.

Operation

- Before exporting the cards, you must first choose the output format.
- **Click** a card to select it. The card image will be lit up in blue.

Select the first card and hold the **Shift** key to select a continuous range of business cards.

Select the first card and hold the **Cmd** key to select extra business cards.

- Click the **Export Selected Cards** command to export the selection of cards.
- The cards will be sent to the application of your choice, which opens automatically.

Note: you can also export a selection of cards instantly by dragging their images to the desktop. For each exported card a vCard or JPEG file is created on the fly.

HELP MENU

Cardiris Help

Provides general information on business card reading (BCR) and reference information on Cardiris.

I.R.I.S. on the Internet

Visit the I.R.I.S. website: www.irislink.com.

Register Cardiris

Register online on www.irislink.com/register.

Search for Updates

This command verifies whether updates of the Cardiris software are available to be downloaded.

IRISCARD BUTTON MANAGER MENU

(This section does not apply to Cardiris delivered with your IRIScan Anywhere scanner)

About IRISCard Button Manager

Displays the Button Manager startup screen with the copyright notices. Click to make it disappear.

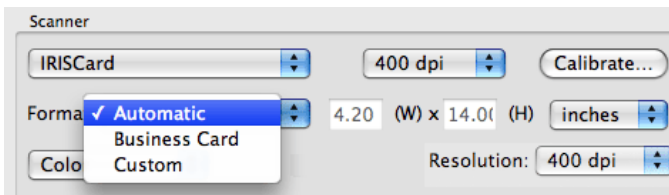
Preferences

Scanning Mode

You can either choose an **automatic** or **custom** scanning format, or you can opt for the Business Card format.

When you select the **automatic** format, Cardiris applies autocropping to reduce the scanned surface to the calling card. White space around the business card is erased to obtain the smallest possible images that are optimally legible.

When you select the **Business Card** format, the image is also cropped automatically, but to the standard dimensions **8.89 cm x 5.08 cm**.



In the **Custom** scanning mode you can specify the card's dimensions yourself and decide whether they are displayed in centimeters or inches.

Color Depth

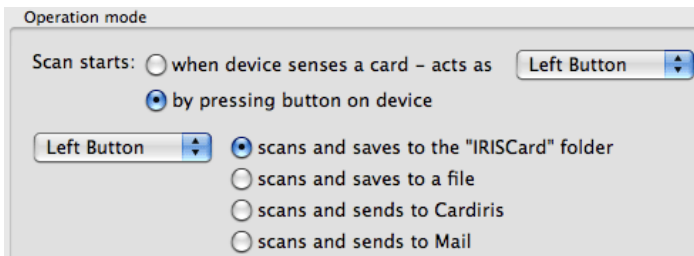
Select the appropriate color depth - IRISCard Button Manager supports black-and-white, grayscale and color images.

Resolution

The resolution can be set to 300, 400 and 600 dpi. It is recommended to use a resolution of 400 dpi.

Operation Mode

Select the operation mode you want to use.



You can either scan:

- **automatically** when the scanner senses a card, or;
- **manually** by means of the scanner buttons.

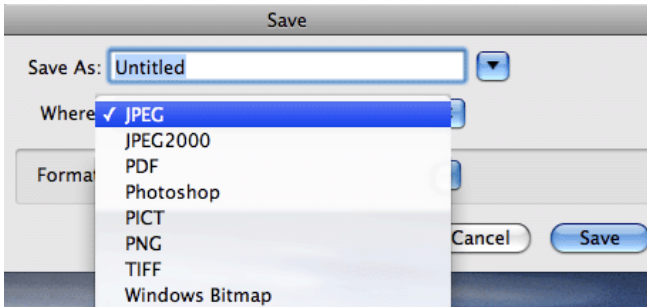
To each of the two scanner buttons, one of four actions can be assigned, namely:

- scan the card and save the image to the IRISCard folder;

The image will be saved as a JPEG file.

- scan the card and save the image to a file;

You are prompted to save the card image in any of the common photo viewing applications.



- scan the card and send it to Cardiris;

The Cardiris program opens automatically.

- scan the card and send it by e-mail.

A new e-mail message, containing the card image, opens automatically.

Make sure your scanner is properly calibrated before you attempt to scan cards. The Button Manager will automatically ask you to calibrate the scanner when necessary.

Note that the Button Manager and the scanner buttons on the IRISCard Pro cannot be used when the scan source inside Cardiris is already set to the same scanner. Notice the padlock icon in the Dock. As soon as Cardiris is exited or its source is set to **File** or another scanner, however, the Button Manager is available again.

Also note that the **scanner buttons** are only operational when the Button Manager is activated.

Quit IRISCard Button Manager

Quits the IRISCard Button Manager application.

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