

# **KENSINGTON PocketScan**

## **User Manual**

Version: 6.2



# **Penpower Technology Ltd.**

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## **FAQ**

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# Chapter 1 Product Introduction

The Kensington PocketScan provides you with a total business card management solution by integrating card recognition, management, transmission, and printing functions in a single digitizing unit. So you can find your business cards at anytime and anywhere when you need them.

- **Easy Card Reader**

Scanning or capturing your business cards has never been quicker or easier.

- **Organizing Business Cards**

After scanning or capturing your business cards, PocketScan software allows you to organize, sort, search, add and delete any entries. Also, you can easily edit and add comments to any business card.

- **Advanced Search**

Full text search to find your contacts easily and conveniently.

- **Support multi-language**

Recognize business cards in different languages, including English, French, German, Italian, Spanish, Dutch.

- **Multiple Categories and Sub-Categories**

Organize card information into categories and sub-categories in anyway you want.

- **Print Templates**

PocketScan provides various print templates. You can also easily create your own templates and print contact information in different formats.

- **Recognize Contacts from Other Sources**

Recognize business card image files taken by digital cameras or advanced mobile phones. It can also work with the flatbed scanner.

- **Data Exchange**

Supports synchronization/importing/exporting for Outlook, Outlook Express, Lotus Notes, Palm, Windows Mobile.

*Note: The Windows Vista version does not support the export/import/sync function for Pocket PC.*

**\* Unicode**

Unicode makes it possible to display various languages of business cards at the same time.

## Chapter 2 Getting Started

### 2.1 System Requirements

- Pentium III 800 CPU or above
- 256MB of RAM
- 200MB of available hard disk space
- Windows 2000/XP/Vista
- USB Port

### 2.2 Installing Kensington PocketScan

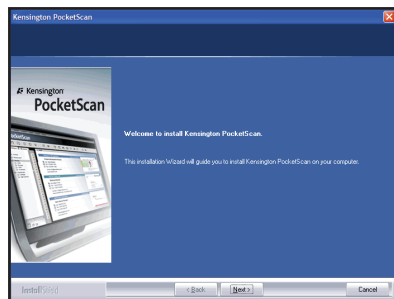
#### To properly use your PocketScan

1. Install the software included on the CD.
2. Connect your PocketScan scanner to your PC.
3. Scan or capture your business cards and enjoy!

#### 2.2.1 Software and Driver Installation

To save time, Kensington has combined the installation of the hardware and software into one easy process. To start, insert the CD into your CD/DVD ROM (if the program does not automatically start, just double-click the setup.exe file on the CD).

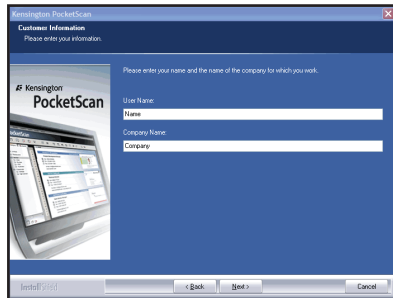
1. Click **Next**.



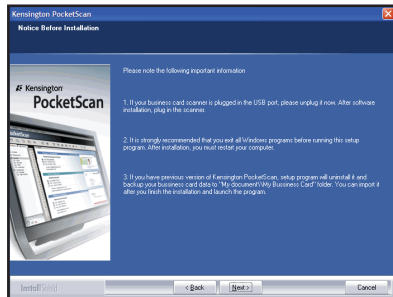
2. Select **I accept the terms of the license agreement** to accept the license agreement. Please read licensing agreement completely.



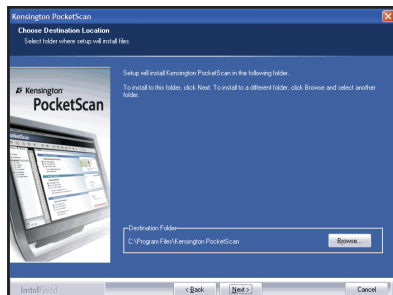
3. Please fill in your name and company name. Click **Next** to continue.



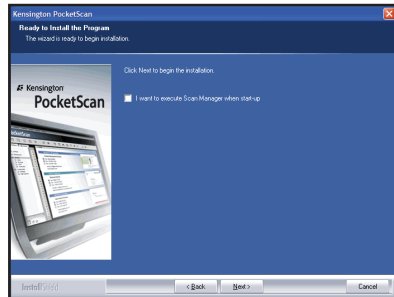
4. Please follow the instructions in the on-screen notice. Click **Next** to continue.



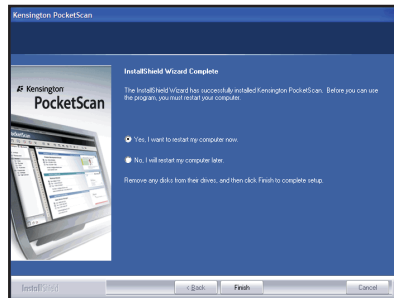
5. Please select the location to install the program. The default location is c:\Program Files\Kensington PocketScan. Click **Next** to continue.



6. If you want to run the Scan Manager when starting up the computer for quick scanning into Outlook, Outlook Express or Windows Contacts directly, click **I want to execute Scan Manager when start-up**, and then click **Next** to continue.



7. Click **Finish** to complete installation. If you do not want to restart now, click **No**, **I will restart my computer later**.





### 2.2.2 Connecting Hardware

After installing the software, connect the USB connection of your PocketScan scanner to the USB port of your computer.

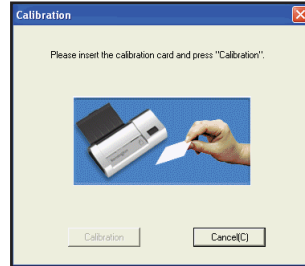
*Note: Some computers may shut down accidentally after connection. This is due to lack of power to support several USB devices. To avoid this problem, connect your PocketScan business card scanner and other USB devices to an extra-powered USB hub.*

## 2.3 Preparation for Card Scan

### 2.3.1 Calibration

After installing the software and drivers, your PocketScan scanner must be calibrated in order to ensure perfect results.

Place the calibration card into the scanner. Make sure the calibration card is flush with the mark to the side.

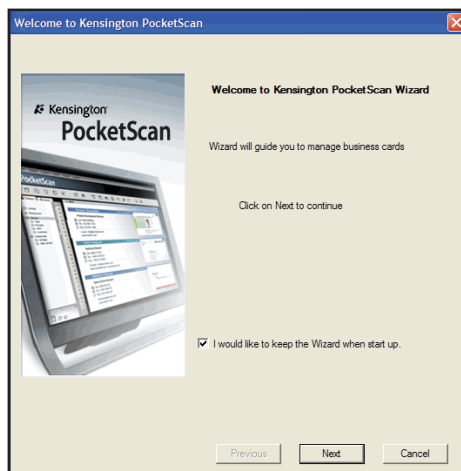


*Note: To calibrate the A8-sized gray-scale scanner, insert the blank side of the card face down. In case the calibration card is lost, you can use any same size white card for calibration.*

### 2.3.2 Start-Up Wizard

Start your PocketScan software by double-clicking the PocketScan shortcut on your desktop. After the PocketScan program starts, the following screen will appear.

1. To start the wizard, click **Next**.



2. The Wizard can help you quickly choose what you want to do:

**Scan Card:** allows you to add a card to your file.

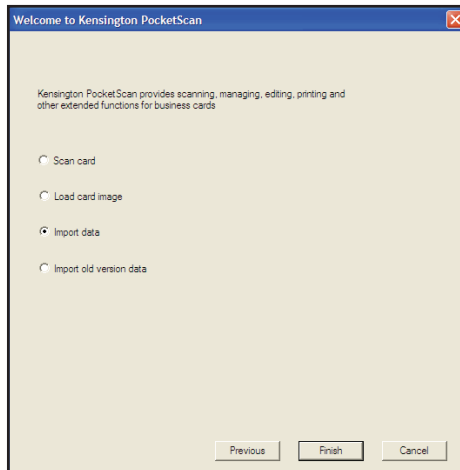
**Load Card Image:** allows you to take an existing picture of a business card and add it to your file.

**Import data:** allows you to import data from sources such as Lotus Notes, Microsoft Outlook and Outlook Express, PocketPC, Palm.

*Notes: The Windows Vista version does not support importing data from Windows Contacts, Pocket PC.*

**Import Old Version Data:** allows you to import the previous PocketScan file formats into your new PocketScan File.

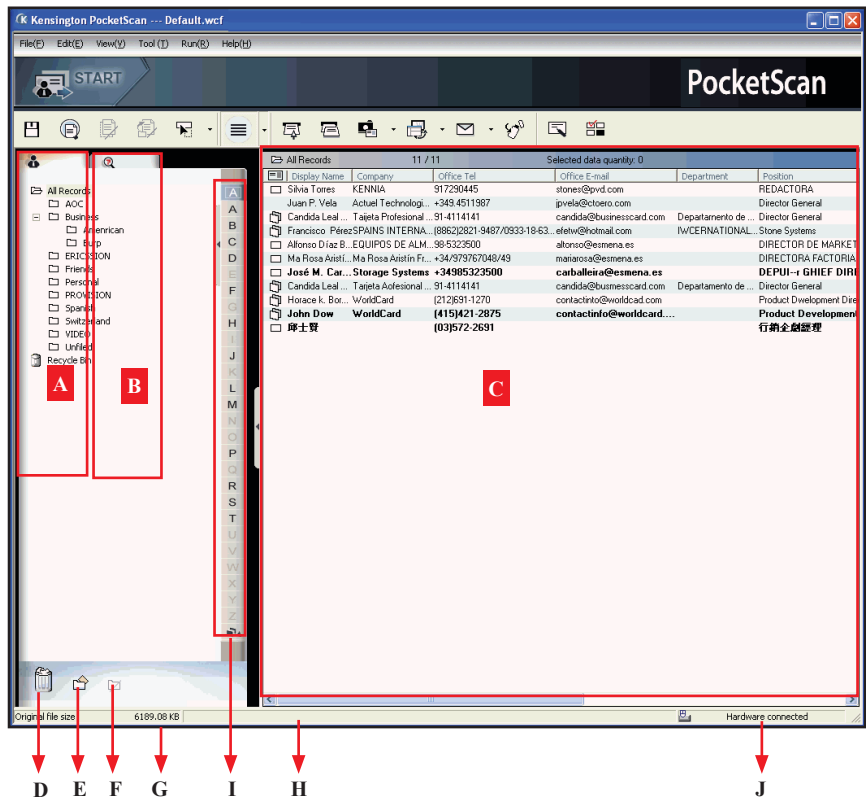
You can select a command and click **Finish** to continue.





# Chapter 3 Overview

## 3.1 User Interface



A: Category tab

B: Search tab

C: Card Window

D: Recycle bin

E: Add Category

F: Delete Category

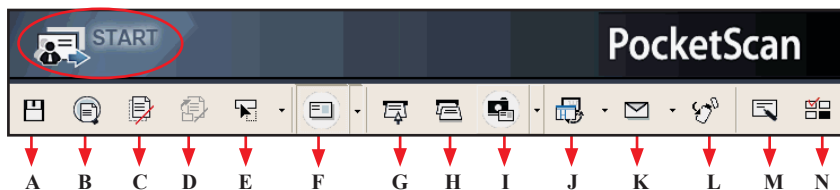
G: Disk space used

H: Status

I: Alphabet

J: Connection status

### 3.1.1 Menu Toolbar



A: Save your Card file

B: Print Preview

C: Delete Card

D: Delete card from Category

E: Settings

F: Mode button

G: Scan a new business card

H: Multiple scan business cards

I: Add a new card from another picture source

J: Synchronize with Outlook/PDA/Palm/Lotus notes

K: Send an email to selected person

L: Export all your data and the portable software to selected flash disk or hard drive

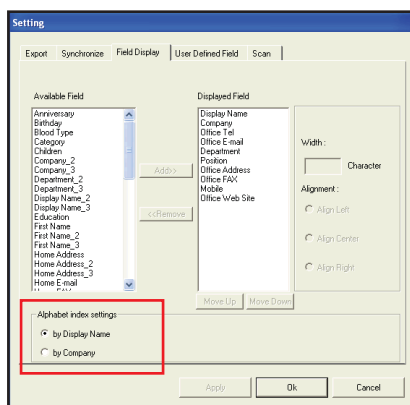
M: Edit Card


N: Edit Print Template

### 3.1.2 Alphabet

When the Alphabet index has contents, the index letter appears in black.


The Alphabet index is indexed by **Display Name** and by **Company**. To select it, on the **Tool** menu point to **Setting** and click **Field Setting**. In the **Alphabet Index settings** area you can choose by **Display Name** and by **Company**.

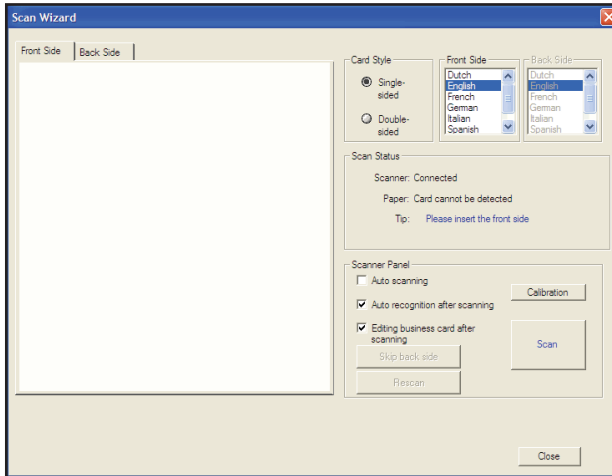


When select **by Display Name**, the contacts will be indexed by display name. When select **by Company**, the contacts will be indexed by company name. If the display name or company name is not English, the contact will be put in .

## 3.2 Scanning Wizard

### 3.2.1 Scanning Business Cards


To scan business cards, select **Scan** . The wizard opens:



1. Under **Card Style**, select **Single-sided** or **Double-sided**.
2. Select the language of the card. If the card is double-sided select the language of the both sides.
3. Insert the card into your PocketScan Scanner, placing the card edge flush with the marker. Once inserted, the **Scanner status** area should say **Ready**.
4. In the **Scanner Panel** area select:
  - **Auto Scanning** if you want the scan to automatically start when the paper is inserted.
  - **Auto Recognition after scanning** if you want the card information to be automatically added to your file. If you want to preview the scanned card image before recognition, do not select this. If you select **Double-sided**, you can click **Skip back side** to scan the front side only.
  - **Editing business card after scanning** to display the Edit window when closing the **Scan Wizard**.
5. After you recognize the card, the information will automatically go into the **Unfiled** category.

*Note: To scan business card, insert the business card face down into the A8-sized gray-scale business card scanner.*

### 3.2.2 Batch Scanning

To batch-scan business cards, select **Batch Scan**  from the toolbar.

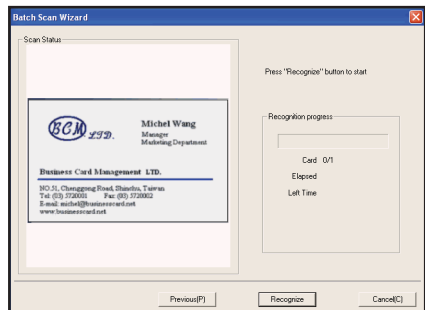
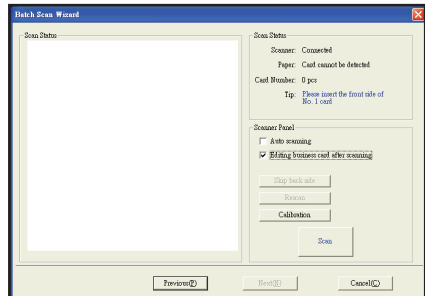
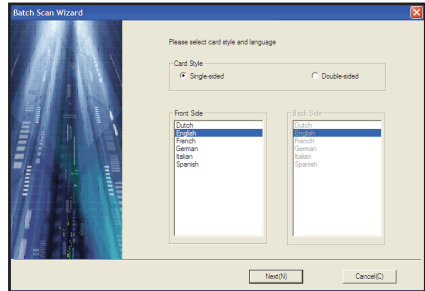
With this command, you can scan many cards easily, preview them, and then add them to your Card File.

1. Select single- or double-sided. Next, select the languages of each side.


**Note:** *only cards (single-sided or double sided) that have the same languages chosen for each card can be batch-scanned.*

2. The **Scan status** pane displays the status of the scanner. Select **Auto scanning** if you want to automatically feed in your cards. If the card does not scan properly, click **Rescan** to try again. If you want to return to the previous screen, click **Previous**.

3. This screen allows you to quickly recognize all the cards scanned during this batch. When you are done, click **Finish**.



### 3.3 Scan Business Card Directly

To scan your card directly, click the Setting arrow  and click **Scan Option**.

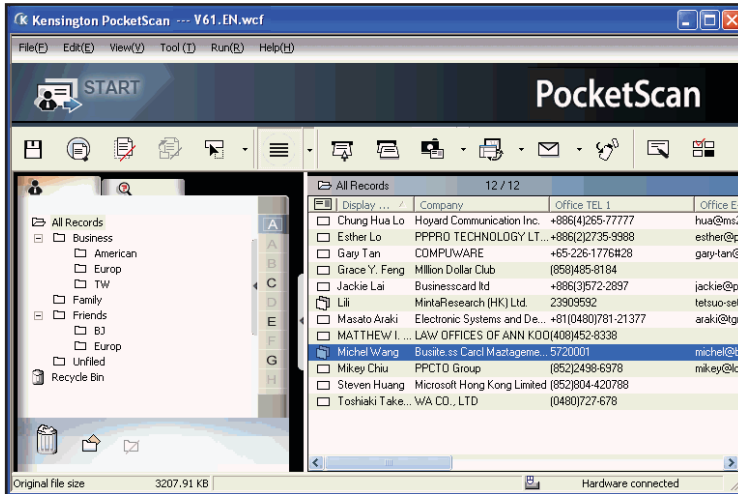
Under **Scan Method** click **Scan card directly**. Refer to **Chapter 5.9** for more detailed explanation.

## 3.4 Viewing Contacts

PocketScan provides several ways to view your contacts: **List mode**, **Label mode**, **Image mode** and **Dual Mode**. The default setting is **List mode**. To select other modes, on the **View** menu click **View Mode** or click the **Mode** arrow from the toolbar.

### 3.4.1 List Mode View

**List Mode** is the default mode view.





### Contact Information List

After scanning business cards, you will see the scanned contact information list in the right pane of the card window.

At the top of the pane, you can quickly see how many cards are in each category. For easy organization, notice the dark-highlighted entries indicate cards that have not been edited or verified yet.

To sort the contact information into alphabetical order, click the field name.

Besides the contact information, you can also quickly discriminate the single  and double sided card  by their different icons.




**Tip:** You may select the displayed fields from the **Tool** menu, point to **Setting** and click **Field Setting**.

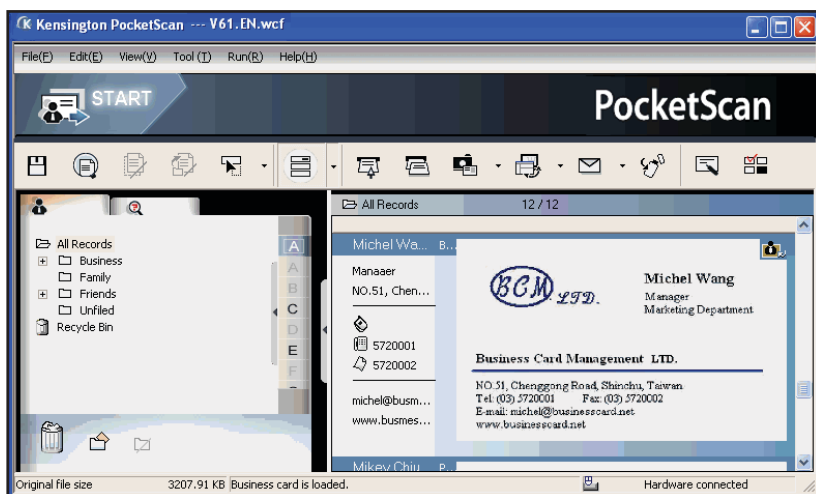
## Category tab


You can manage your business cards by storing them in category groups. The **Category** tab is in the left pane of the card window. You can find the **All Records** category and the **Unfiled** category as the default. PocketScan allows you to add as many user-specified categories and sub-categories to manage your business cards as you choose.

### 3.4.2 Label Mode View



The **Label Mode** view displays contact information and business card at the same time.


The contact information shows display name, company, title, office address, mobile phone number , office telephone number , office fax number , Email address and website.

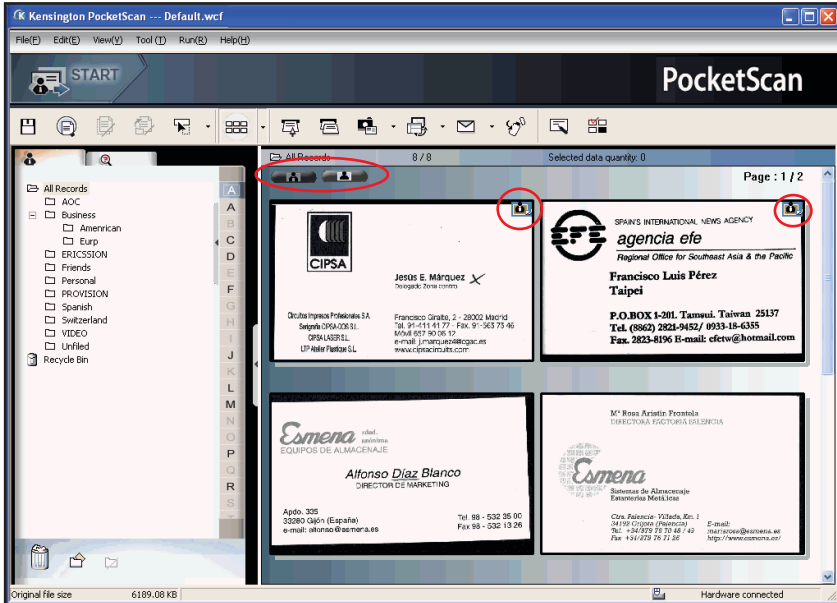


This icon  means the business card is double sided.

### 3.4.3 Image mode


Click the  button to view front side of all business cards, click the  button to view the back side of all business cards.

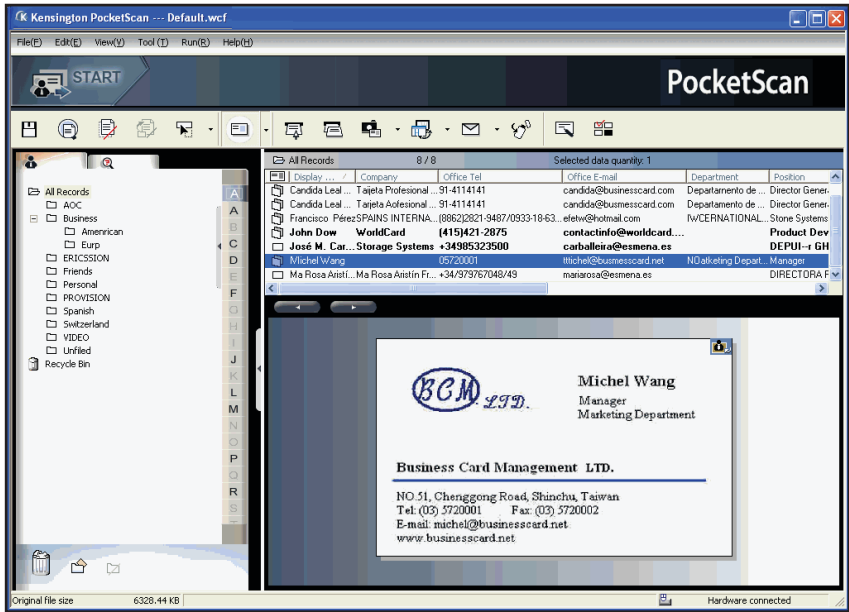
When the  icon shows in the right-top corner, it means the contact has a double-sided business card image. You can click the icon to see the other side of business card image.



### 3.4.4 Dual mode

Dual mode lists the scanned contact information in the upper right management pane and can display the front and back side image of the business card in the lower right pane. You can click the front or back side icon of the card to magnify it.

When the  icon shows in the right top corner, it means the contact has double-sided business card image. You can click the icon to see the other side of business card image.




*Tip: You can drag the business card image from the view modes (except List Mode) to other applications such as Microsoft Word, Excel etc.*



## Chapter 4 Editing Cards

### 4.1 Editing Window Overview

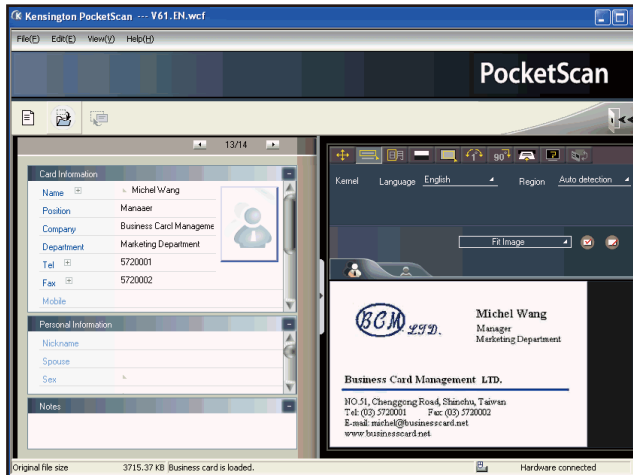
The **Editing** window allows you to edit the information of individual business cards.

To select the **Editing** window, just double-click any card record in the list menu of the management pane or click the **Edit Selected Record** button  on the **Editing** toolbar and edit the selected records.

You may click a record and press CTRL or SHIFT key on your keyboard, and then click another record for multiple selection.

### 4.2 Verifying Contacts

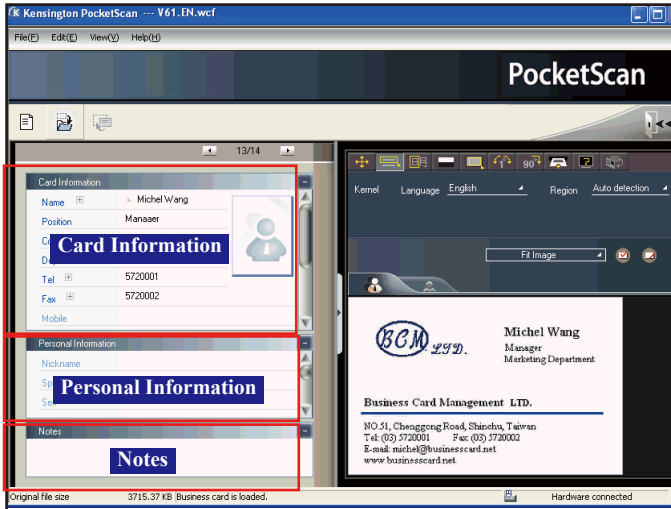
The **Editing** window allows you to verify the individual contact information for any specific business card. When the editing window is open for a card, the following screen will be presented containing information relevant to the card selected from the **Management** window.



The **Editing** window may be used to edit any information on a business card and to correct or update information as necessary for future changes of an individual contact. The features and functions of this window are described below

## 4.3 Editing Contacts



The PocketScan **Editing** window has three panes: the **Card Information** pane, the **Personal Information** pane and the **Notes** pane. The **Card Information** pane displays all relevant business card data that was retrieved from the card recognition. The **Card Information** pane is shown in the following picture.




The information in the **Card Information** pane is categorized in fields such as Name, Position, Company, Address, Telephone/Fax numbers, Email address and Web Site. Additional categories are also available.


The **Personal Information** pane displays personal information about your contact which is not retrieved from your contacts business card.

The **Notes** pane stores/displays important data from your personal notes about your business contacts.

*Note: If, at any time during the editing mode, an incorrect action is selected, you can reverse the changes by clicking the Restore button  from the Editing window. Clicking the Restore Icon  will delete the last change made and restore the previous content of the business card.*

To exit the **Editing** window, right-click the **Exit** button  or select **Exit** from the **File** menu of the **Editing** window toolbar.

### 4.3.1 Recognizing Partial Content of a Card Entry

In some cases, the information of a business card may not be completely recognized. You may use the **Partially Select and Recognize** command of the **Editing** window. To select **Partially Select and Recognize**, click this icon .

After clicking the **Partially Select and Recognize**, you can select the information from the business card that requires correction by using the mouse to select the specific area that contains the correct data.

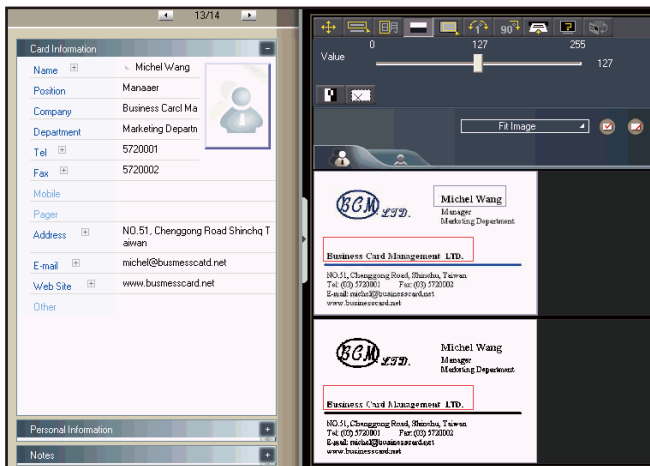
After selecting the area, select the appropriate field for the information which has been highlighted.





### 4.3.2 Adjusting the Separation Rate

The **Separation Rate** is the rate of separation between the color of the card background and the color of the text data contained on the business card.

After clicking the **Separation Rate** button , the following window appears.



You can move the slider to achieve the clearest contrast between the background colors of the business card and the text on the card. This adjustment is useful when the business card image is blurred, or the contrast between the text and the background of the card is not sufficient for correct recognition of the card information.

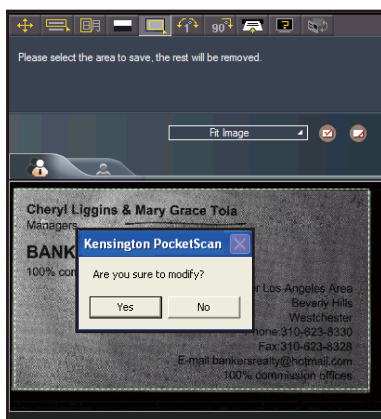
You may also adjust the separation rate by area. On the top business card image, select a specific area, and move the slider to achieve the clearest contrast between the background and text of the selected area. You can adjust multiple areas, each area with its own separation rate. Click the  button to remove selected area. Click the  button to reverse selected area.

### 4.3.3 Deframing Command


The **Deframing Manually** command allows you to select a specific area of a business card to save. After the appropriate area is selected, a box will be drawn around the selected data.

If the data selected to be modified is correct, click **Yes** in the dialog box.

The data outside of the selection box will be changed to white.







### 4.3.4 Fine Rotate

The **Fine Rotate** command  is used to correct the horizontal positioning of a card after it has been scanned. This is sometimes necessary if a card has been inserted into the PocketScan scanner incorrectly and the resulting scan is skewed in the horizontal plane. An indication of a card that has been improperly scanned is as follows:



### 4.3.5 Rotating Card


If the card image shows an incorrect orientation, you can use the **Rotate Card** command of the PocketScan editor to properly align the card orientation. To use the **Rotate Card** command, click the **Rotate Card** button  in the **Editor** window. After you click the button , the rotation angle options will appear.

Select the appropriate angle of rotation and then click the **Rotate** button . The card image will then rotate to the selected orientation. Should you need additional fine adjustment of the card image, click the **Fine Rotate** button  required.




The rotation angle is selectable from a pulldown menu.

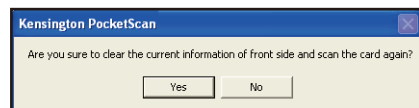
### 4.3.6 Rescanning Card

If a card is scanned inappropriately, you may use the **Rescanning** command of the PocketScan editor by clicking the **Rescanning** button . After clicking the **Rescanning** button, the following menu appears.

You can select the appropriate languages from the pulldown menus.


After you have selected the appropriate language settings, you can click the **Scan** button  to rescan the business card.

The card must then be inserted into the PocketScan scanner as appropriate for the orientation of the languages selected.




### 4.3.7 Recognize Again

After adjusting a card image with any commands of the **Editing** window, you can recognize the business card again to update the image processing of your revised card image.

This task can be accomplished by clicking the **Recognize again** icon  from the **Editing** window.

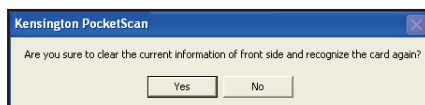
Select the appropriate language(s) for the front and/or back side of the card. Then, select the correct region for the language.



You may use the **Auto detection** feature in the geographic region selection. If the card is double-sided, select the **Both Sides** command to recognize each side. You may then proceed with the **Recognize again** command by clicking the **Recognize** button .

After clicking the Recognize icon is selected, the following prompt appears in the **Editing** window.

Click **Yes** to begin the recognition process. Note that the card information will be cleared when you click **Yes**.

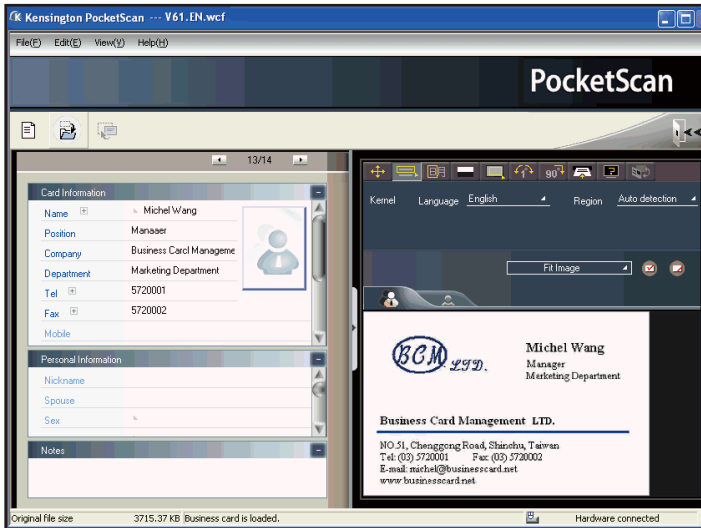


### 4.3.8 Front and Back Business Card Image Exchange


Click  to exchange the front side and back side images of the business card.

## 4.4 Viewing Cards


Cards are displayed in the **Editing** window after the scanning process. The following window shows a typical display of a card in the Editing window.




You can click **Back Side** button  to see the back side image of the business card.


You can click  to select the different display percentage of the business card image.

### 4.4.1 Saving Card Image

If the displayed card image is clear and the information legible, the card image can be saved as a .jpg file by clicking the **Save Card Image** button .

### 4.4.2 Deleting Card Image

To delete a card image from the **Editing** window, click the **Delete Card Image** button  with your mouse pointer.

If you have made an error in deleting a card image, the **Editing** window allows you to recover the card image by clicking the **Restore** button .





## Chapter 5 Managing Business Cards

The management functions of PocketScan allow you to categorize contacts, send e-mail by contact or group functions, add new cards to a group, import cards from other sources, search cards by various data fields, encrypt files to protect your card database, print cards, export the database to other applications and synchronize your card information with other software applications.

### 5.1 Categorizing Cards

The PocketScan software allows you to manage your business cards by storing them in the category groups. After installing your PocketScan software, you will find two default categories on the management page: the **All Records** category and **Unfiled** category. You can add as many user-specified categories and sub-categories as you choose to manage your business cards.

#### 5.1.1 Categorizing from Management Page


Each card, in addition to being categorized by last name, can also be categorized with our own individual settings so that you can efficiently manage numerous cards in your PocketScan database. From the PocketScan **Management** pane, highlight the card information you want to categorize, drag it directly into a specific category type under the **Category** list on the left side of the management window.

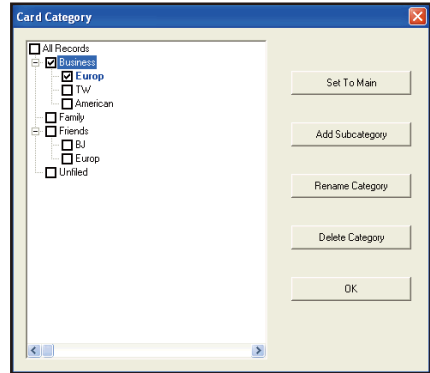


*Tip: Cards in each category can be easily moved from one category to another by dragging.*

*Tip: Each card can belong to a main category and numerous sub-categories. For example, Bruce is a vendor of your company and your classmate. You can drag his card into vendor category and then, drag his card into the classmate category from the All Records category. The first category you drag Bruce's card to will become the main category for his card entry.*


### 5.1.2 Categorizing from Editing Page

PocketScan allows you to categorize a business card directly from the **Editing** pane. To categorize a card from the editing page, click on the **Set Category**  button. The **Card Category** dialog box appears. Select the category and then click **OK**. You may also add a subcategory from this window by clicking the **Subcategory** button.



### 5.1.3 Sending Email by Category

To send email to a category group, select the appropriate category group from the management page. Once selected, the category will appear in the right pane of the **Management** window.

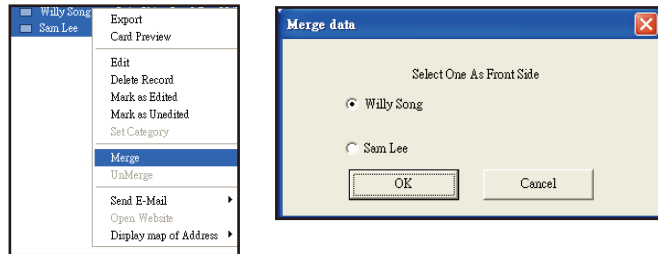
To send email to the group, click the **Email** button . PocketScan will add the email addresses of the group members into your default email software. Also the **Email editing** window will then open with the appropriate contact list.

## 5.2 Merging and Separating Cards

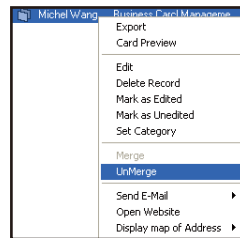
PocketScan allows you to merge two business cards into one card entry. To merge two cards into one, select two cards in the **Management** window.

On the **Tool** menu on the **Editing** window, click **Merge** and the following dialog box appears.

Select the appropriate card as the front side of the merged card entry and press **OK**. This action will merge the cards into one entry.



Separating double-sided cards into two distinct card entries can also be accomplished with PocketScan. To separate a double-sided card into two separate entries, select the appropriate card from the **Management** window. Then, on the **Tool** menu click **UnMerge**. The double-side card is separated into two separate entries in the appropriate category.



## 5.3 Adding new Cards

You may add contacts to your PocketScan database by scanning their business card or by manually entering the contact information. If you do not have a card from a new contact, you can enter the contact information of a new business contact into your PocketScan database manually.

### 5.3.1 Adding an Empty Card

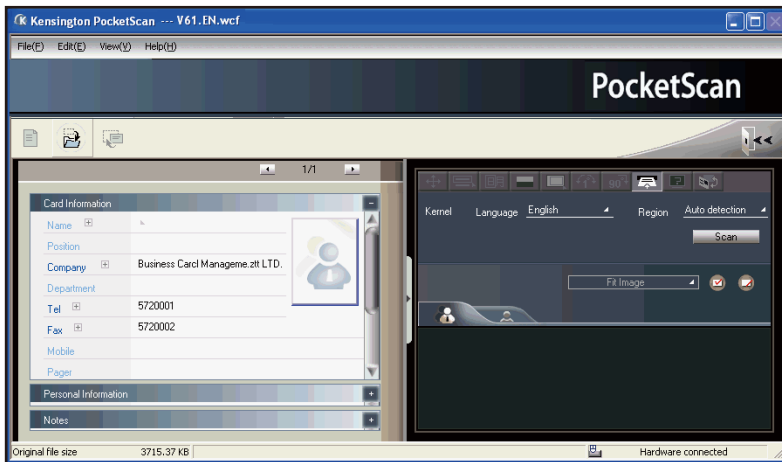
To enter a contact manually without a business card, on the **File** menu in the **Management** window, click **New Empty Card**. This will open the **Editing** window.

In the **Editing** window, manually select each category for your new contact. Then, type your new contacts information into the field.

### 5.3.2 Adding the Same Company Card

PocketScan allows you to add contact information for a new colleague from a company that is already in your database without scanning the actual business card. To add a new colleague of a company already on file, in the **Management** window, select a card from the new colleague's company.

After you have selected the card of the new colleague's coworker, on the **File** menu in the **Management** window select the **File New Same Company Card**. This will open the **Editing** window.




On the left side of the **Editing** window, the new colleague's company information will appear in the **Card Information** pane of the **Management** window.


## 5.4 Adding Cards from Other Resources

The PocketScan Business Card Scanner and other recognition products are equipped with a card scanner or camera which are used to capture a card image. However, you may use other hardware resources in conjunction with your PocketScan software to process card images.

### 5.4.1 Photo File

PocketScan can process a business card entry from a photo image in either .bmp or .jpg format. To use this option of your PocketScan software, you must have a picture image of the card on an accessible medium which your computer can access directly, as well as a connected the camera or scanner. To select an alternative image source click the **Image Source** icon  and select the appropriate image source, either **Photo File** or **Twain Scanner**.


### 5.4.2 Twain Scanner


Card entries may also be uploaded through any TWAIN-compliant scanner. If your scanner is connected, **PocketScan** software will recognize it and add the scanner to the resource list. Click the **Image Source** arrow  and click **Twain Scanner**.

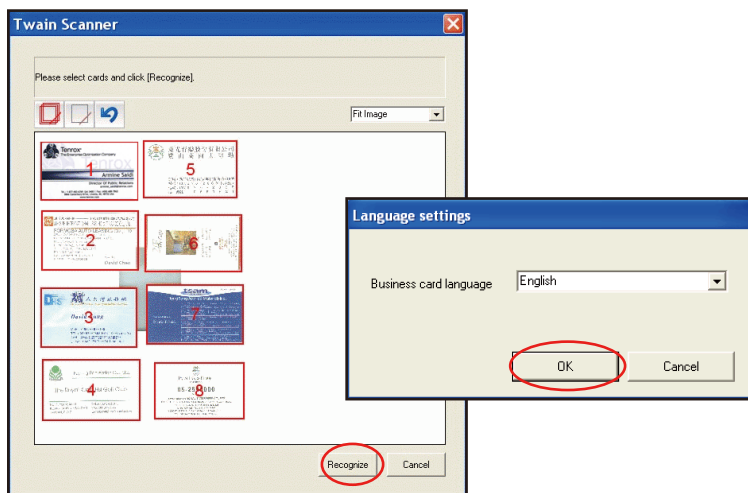
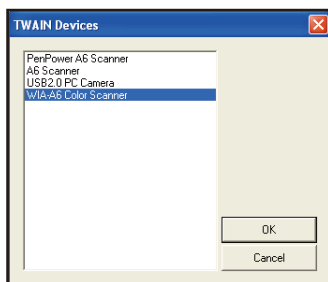
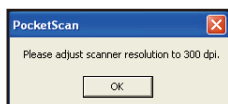
Ensure that the resolution for your scanner is set to at least 300dpi.

*Tip: You may scan up to 8 cards at one time with an A4 size flatbed scanner. Place the card on the bed of your scanner with some separation between the card edges to clearly distinguish each individual card. You may also use an A4-size white paper to cover the business cards for recognizing regions of business cards properly.*

When the scanning process is completed, the following **TWAIN Scanner** dialog box appears.

You can also recognize the cards automatically by clicking the **Clear All Regions** button . This will remove all red recognition rectangles from your **Twain Scanner** window.

Then click the **Auto Select Regions** button . You will see the recognized cards identified as in the previous display of the **TWAIN Scanner** dialog box. Recognized cards will appear within red rectangular boxes with their corresponding recognition number superimposed in red. Please see the following example of a correctly recognized card, (number 1) and so on.



After the cards have been identified, click **Recognize**. In the **Language settings** dialog box you can select the language to use to recognize the business cards. When the recognition process is completed, you will be returned to the **Management** window. Your new card entries appear at the bottom of your **All Records Category**.


## 5.5 Searching Contacts

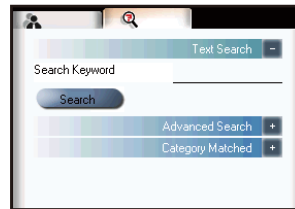
You can quickly and efficiently find your contacts with PocketScan **Search** features.


### 5.5.1 Text Search

The **Text Search** command of the PocketScan software allows you to quickly find a specific contact. To use **Text Search** in the PocketScan **Management** window, on the **View** menu point to **Search**, and click **Text Search**.

The **Text Search** pane appears as follows:

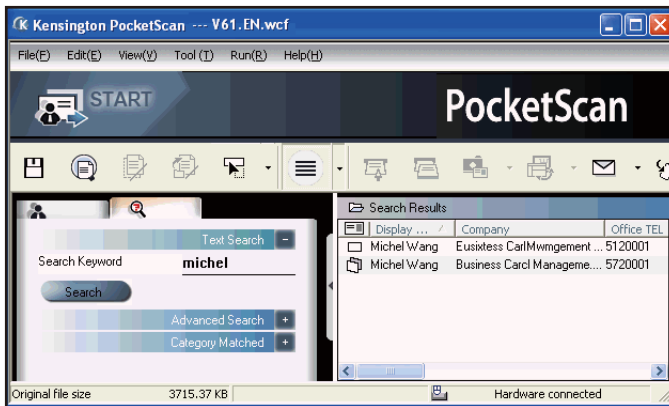
*Tip: You may enter the Text Search window directly from the PocketScan Management window by clicking the Search button .*



In the **Text Search** pane, enter a key word or a group of key words separated by a blank space in the **Search** box  and click the **Search** button . The **Search** pane will update, displaying the results as in the following picture.

In the left pane, there is a list of all categories where the data from your search string was found. The right pane shows the search results that display all of the applicable fields for the cards stored in your PocketScan database.

You can double-click on any record displayed in the **Search Results** pane to open the card in the **Editing** window.



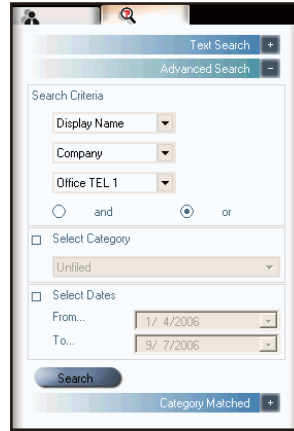
### 5.5.2 Advanced Search

**PocketScan** also offers an advanced search function. To use the advanced search function, on the **View** menu, point to **Search** and click **Advanced Search**.

The **Advanced Search** pane will open and appear as right.

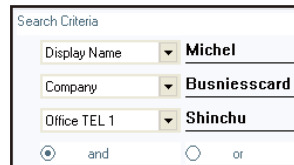
*Tip: You may also open the Advanced Search pane from the PocketScan Management window by clicking the Search button . When the Text Search pane appears, click on the Advanced Search + button*








In the **Advanced Search** pane, you can enter your search criteria by category. You may select from categories in any one of three option windows. If you have several cards with similar criteria in your database, you may narrow your search further by using more than one of the **Search Criteria** menus.

After a **Category** for your **Advanced Search** is selected from one or all three **Category** options, you may enter an appropriate search string in the text field of each **Category**. A completed search will appear.



Please also note that the **Search Criteria** options include the **AND** operator  and the **OR** operator . You may use these operators to further define your Advanced Search. The **AND** operator defines that your search results contain the criteria listed in all three search fields. Using the **OR** operator, a valid result must only match one of any of the three fields to be a valid result.

You can further define your **Advance Search Criteria** by using a specified **Category**. To select a specific category, select **Select Category**  and specify a category.

You may also define your **Advanced Search** by calendar dates. To define a period for an **Advanced Search** by **Dates**, select **Select Dates** icon  and make date selection available.

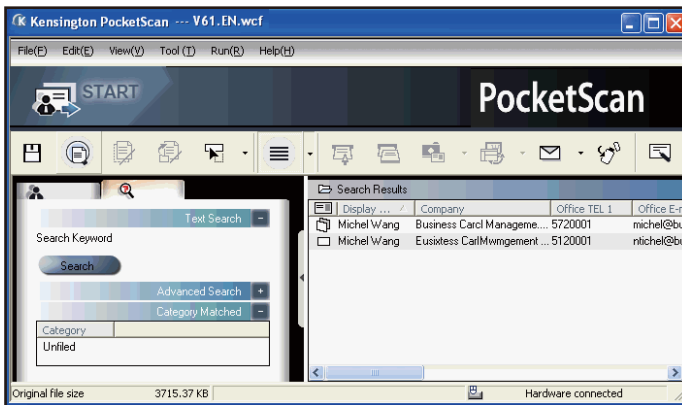


After selecting search by date, you may use the **From** and **To** date options to specify a period for your search criteria. The **From** and **To** options appear as in the right picture.

### 5.5.3 Finding Duplicate Data

Over a period of time, you may find that you have received a business card from the same individual on more than one occasion.

PocketScan has a built-in feature for finding duplicate data. To use **Finding Duplicate Data**, click **Run** on the **Main Menu** and then **Duplicates Data**. A progress meter briefly displays in the middle of the **Management** window showing the progress of the search. After all records have been scanned, the **Search Results** pane displays any duplicate entries as shown.




In the pane on the left side, there is a list of all **Categories** where **Duplicates Data** was found. In the **Search Results** pane on the right side, there is a list of all duplicate card entries.

## 5.6 Safeguarding Your Contacts

Information is a valuable resource to any business. PocketScan recognizes the intangible value of your business card contacts and has built-in features to help you safeguard that data.

### 5.6.1 Save

PocketScan is a business card database management system. It automatically saves all changes when exit the system. You can manually save your card database by on the **File** menu click **Save**.

You can also save your database by clicking the **Save** button  on the PocketScan **Management** window.

### 5.6.2 Save As

You can save your database file to a specified directory for use as a backup file by using **Save as**. On the **File** menu, click **Save As**.

PocketScan database files are stored in the .wcf format. No other format options are available. After you have named your file accordingly, click **Save** to complete this operation.

### 5.6.3 File Encryption

Protecting sensitive contact information is important in the business environment. The PocketScan software recognizes the importance of sensitive data and allows you to protect that data from unauthorized access.

To protect your PocketScan database from unauthorized access, PocketScan offers you an automatic file encryption with password protection. You can encrypt your PocketScan database by the following procedure.

On the **File** menu, click **File encryption**. The **File encryption** dialog box appears.

If you wish to use **File encryption**, select **Use file encryption**.



With **Use file encryption** selected, you may use the **File Encryption** option with password protection.

When the **Set Password/Change Password** option is selected, the password option is available for you to enter your appropriate password options.



*Note: Protect and safeguard your password. PockstScan does not offer a password recovery option. If you forget your password, your database is inaccessible.*

*Tip: If you wish to decrypt the File encryption, place the mouse pointer over the selection circle of the UnUse file encryption option.*

## 5.7 Printing Cards

PocketScan software allows you to print card information in several usable formats. An overview of the PocketScan printing features is presented in this chapter.

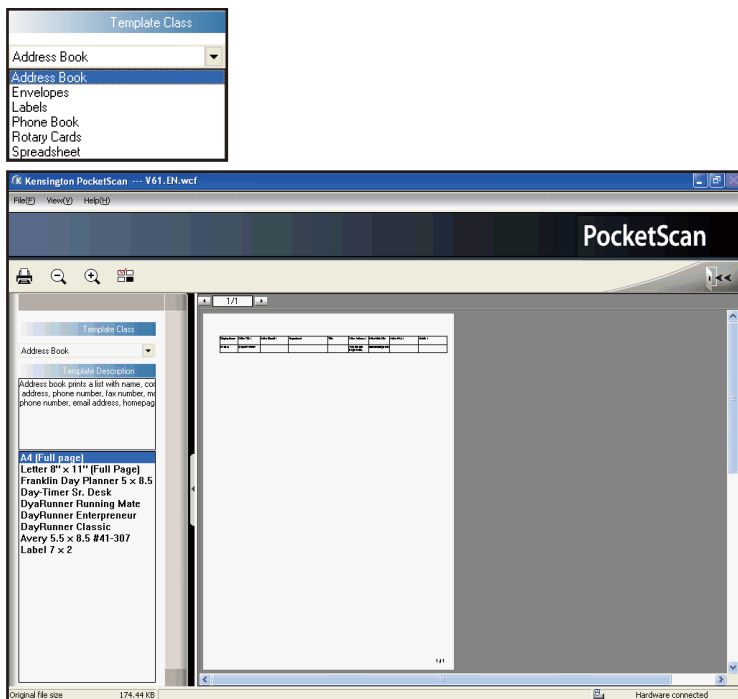
### 5.7.1 Printing Preview

Before printing card information, PocketScan allows you to preview your information in the appropriate format for your desired output. To use the **Print Preview** options of your **PocketScan** software, on the **File** menu click **Print Preview**, and the **Print Preview** pane appears.


At the **Print Preview** pane, you can select several **Print Preview Template Classes** from the **Template Class** menu to the left of the **Print preview** pane.

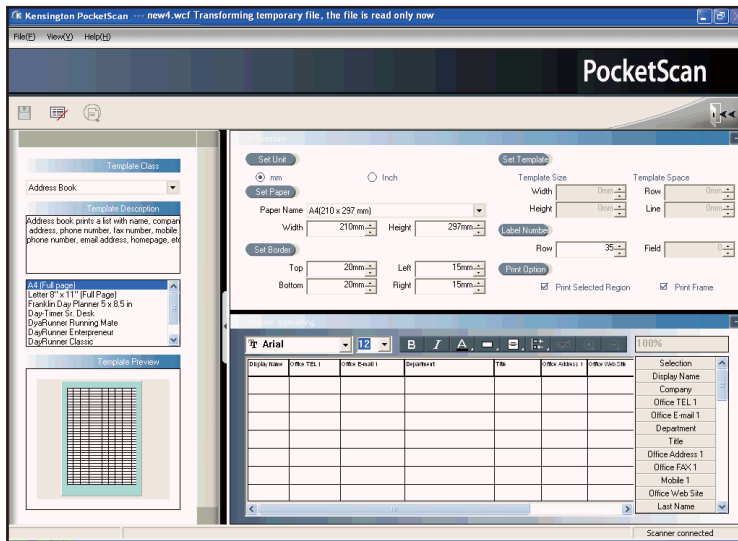
After the applicable Template is selected, you may further define your printing preview by selecting the available options in the selected Template. A similar **Print Preview** option list will appear depending on your selected **Template Class**.

When a **Preview** option has been selected, the **Print Preview** pane reflects that change on the right side.



## 5.7.2 Editing Print Templates

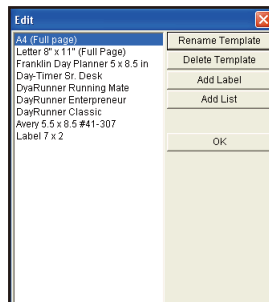
PocketScan allows you to edit templates for printing your cards. On **File** menu click **Print Template Edit**, the following pane appears. You may also click the **Edit Print Template** icon .



To edit the Print Template, you may select a **Template Class** and **Template** from the left pane. Then adjust the settings of the print paper from the pane on the upper right. If you wish to choose print fields, you can drag the field into the template editing area.

PocketScan provides **Add Label** and **Add List** template model for creating your own templates. On the **Template Class** menu, click **Edit**. The **Edit** dialog box appears.

To add a new print template, click **Add Label** or **Add List**, and then enter the template name. Click **OK** to return to the **Print Template Edit** pane for editing the new print template.



*Note: You may also rename or delete templates with the Edit function.*

## 5.8 Exchanging Contacts

PocketScan software allows you to exchange valuable contact information with other applications through the use of the **Import**, **Export** and **Synchronize** commands.

### 5.8.1 Export

To select export fields, you may refer to **5.9.1 Export Option** for a detailed explanation. To export your **PocketScan** database to another application such as Microsoft Excel, Access, Outlook, Outlook Express, Lotus Notes, PocketPC, Palm, CSV or VCard, on the **File** menu click **Export**.

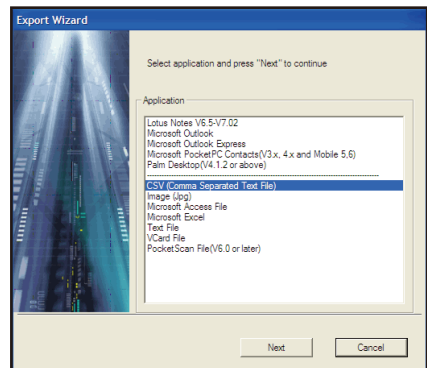
*Notes: The Windows Vista version does not support Exporting data to Pocket PC.*

This will open the **PocketScan Export Wizard** screen and the following dialog box appears.

To use the **Export Wizard**, select the type of application for the file type that you want to create.

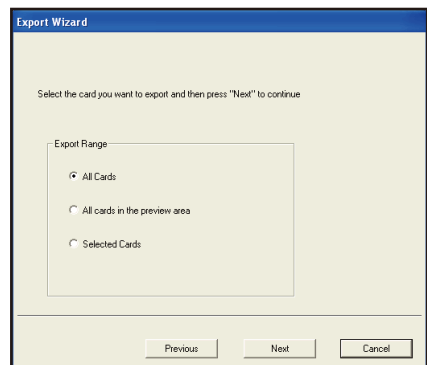
*Tip 1: Export Text File allows you to export all fields.*

*Tip 2: Export function supports on Excel 97, Outlook 97 and Outlook Express 4.0 version and higher.*



Click **Next**. The next **Export Wizard** dialog box displays.

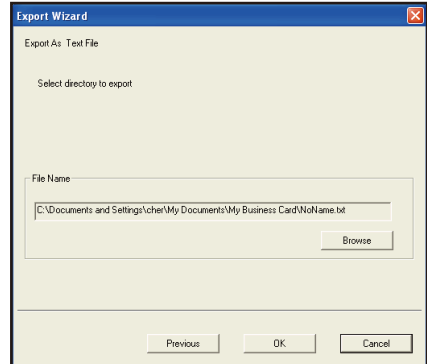
Follow the instructions given in the **Export Wizard** dialog box to select which cards you want to export. And then click **Next**.



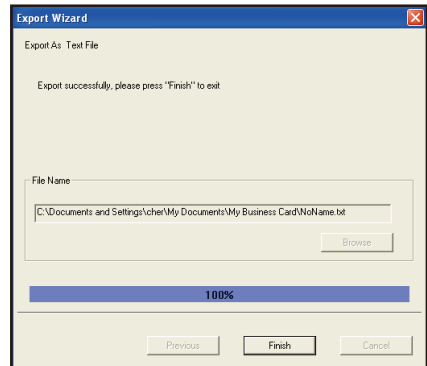
If you have chosen to continue with the **Export** function, choose the directory to export the files to.

Click **OK** to export the cards.

To complete exporting the files, review the information displayed in the **Export Wizard** window.

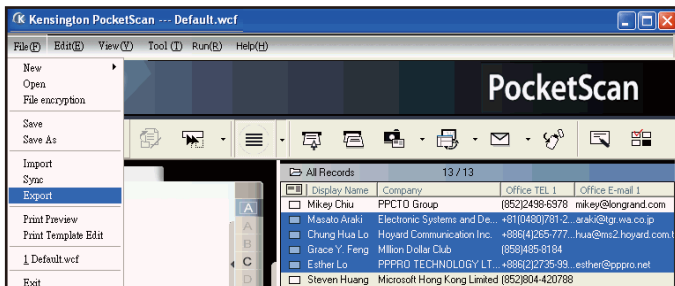


After exporting is completed, click **Finish** to close the **Export Wizard** dialog box.



The **Export Wizard** operations for exporting your PocketScan database to all application types are similar and will not be discussed individually in this manual. However, a brief overview of the Export of a card to Microsoft Outlook will be presented.

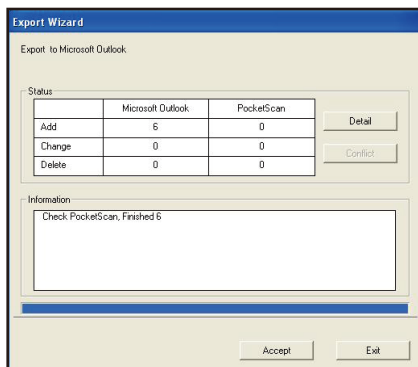
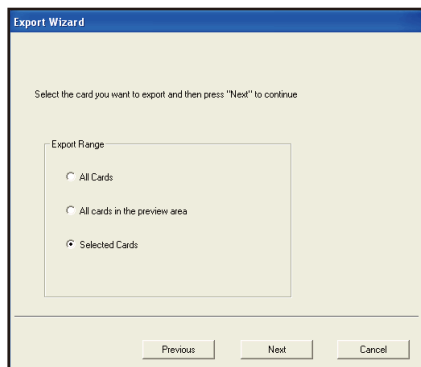
To export a card to Microsoft Outlook, select a card or a group of card by selecting the specific card(s) in the **PocketScan Management** window as shown in the following picture.



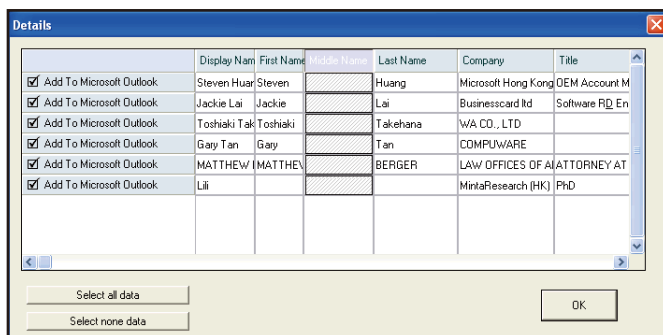
On the **File** menu, click **Export**. The **Export Wizard** dialog box appears, as previously displayed in the section. Select the Microsoft Outlook application from the **Application** pane in **Export Wizard** dialog box and click **Next**. The next step is displayed in the **Export Wizard** dialog box.

Select **Selected Cards** in the **Export Range**. Click **Next**.

The following **Export Wizard** status dialog box appears.



When the Export process is completed, you can view the **Details** page as shown in the following picture by clicking **Detail**.



From the **Details** dialog box, you can choose to export all details of each card or none. To close the **Details** dialog box, click **OK**. This will return you to the **Export Wizard** status dialog box as seen previously in this section.

To complete the **Export** process, click **Accept**. You may see a suspicious script warning message at this time. Click **Continue** on the warning dialog box to proceed. The **Export Wizard** will now display the completed **Status** and **Information** of the exported cards being processed.. To exit the **Export Wizard**, click **Finish**.



## 5.8.2 Import

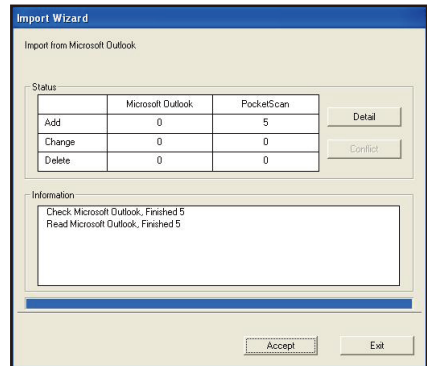
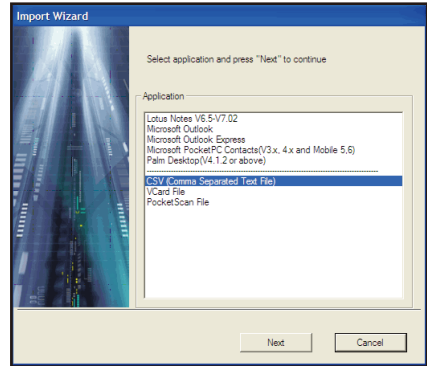
To import data into your PocketScan database from another application such as Microsoft Outlook, Outlook Express, PocketPC, Palm, CSV or VCard, click **Import** on the **File** menu. The **Import Wizard** dialog box appears.

Select the type of application source to import into your PocketScan database.

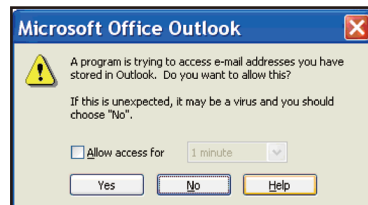
*Note: The example displays import data from Microsoft Outlook Express using Windows XP.*

*Note: Windows Vista does not support importing data from Windows Contacts, Pocket PC.*

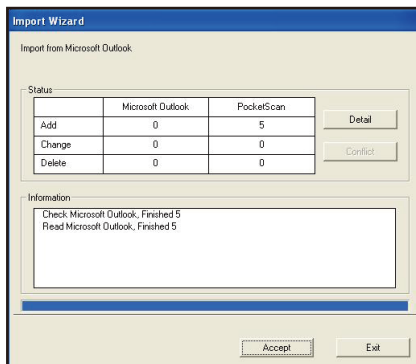
Click **Next** in the **Import Wizard** dialog box. The next dialog box appears.



*Note: When importing data from a Microsoft Office application such as Microsoft Outlook, you may receive a warning message to advise you that a program is trying to access email address information from the application. This warning message may appear similar to the following picture depending on your version of Microsoft Office. To continue, click Yes.*



While your files are being imported, a blue progress bar displays. After the process is completed, the **Import Wizard** dialog box displays **Status** and **Information**.



**Import Wizard**

Import from Microsoft Outlook

Status

	Microsoft Outlook	PocketScan
Add	0	5
Change	0	0
Delete	0	0

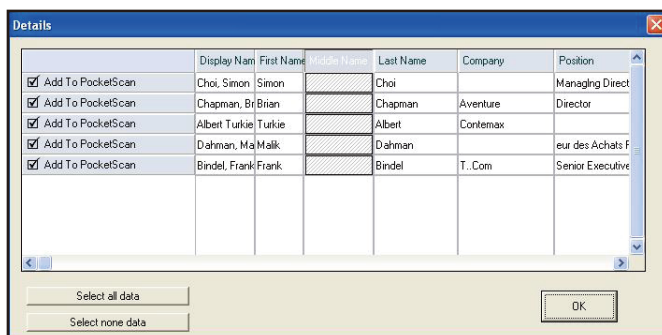
Detail  
Conflict

Information

Check Microsoft Outlook, Finished 5  
Read Microsoft Outlook, Finished 5

Accept Exit

You can view the actual information being imported by clicking **Detail**. The **Details** dialog box displays.



**Details**

	Display Name	First Name	Middle Name	Last Name	Company	Position
<input checked="" type="checkbox"/> Add To PocketScan	Choi, Simon	Simon		Choi		Managing Direct
<input checked="" type="checkbox"/> Add To PocketScan	Chapman, Br Brian			Chapman	Adventure	Director
<input checked="" type="checkbox"/> Add To PocketScan	Albert Turkie	Turkie		Albert	Contemex	
<input checked="" type="checkbox"/> Add To PocketScan	Dahman, Ma Malik			Dahman		eur des Achats F
<input checked="" type="checkbox"/> Add To PocketScan	Bindel, Frank	Frank		Bindel	T..Com	Senior Executive

Select all data  
Select none data

OK

In the **Details** dialog box, you can select to import all details of each card or none and then click the **OK**.

To complete the Import process, click **Accept**. The **Import Wizard** dialog box will update the **Status** and **Information** fields for the data accepted. When the update is completed, click **Finish** to close the **Import Wizard**. You will find that your imported records have been added to the bottom of the cards listed in **All Records** category.

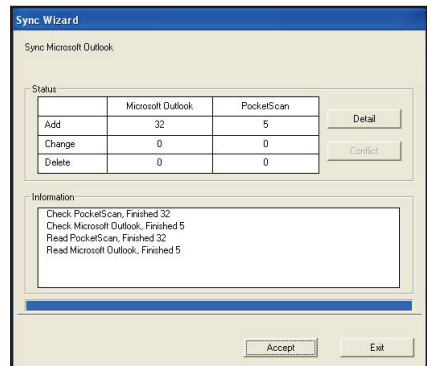
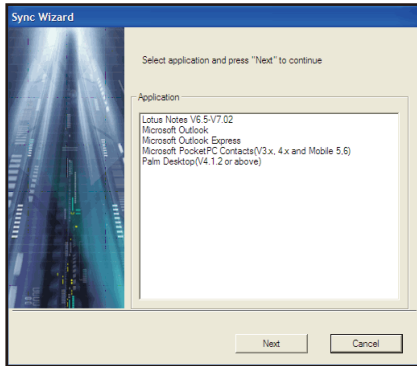
### 5.8.3 Synchronize

The **PocketScan Synchronize** function allows you to synchronize the data between **PocketScan** and other applications such as Microsoft Outlook Express, Microsoft Outlook, Lotus Notes, PocketPC Contacts, Palm Desktop .

*Notes: The Microsoft Vista version does not support synchronizing data with Windows Contacts, Pocket PC.*

To use the **Synchronize** function, on the **File** menu, click **Sync**. The **Sync Wizard** dialog box appears.

Select the application that you desire to synchronize with your PocketScan database by clicking **Next**. The **Sync Wizard Status** and **Information** dialog box will open. At the same time PocketScan will begin to synchronize with the selected application.

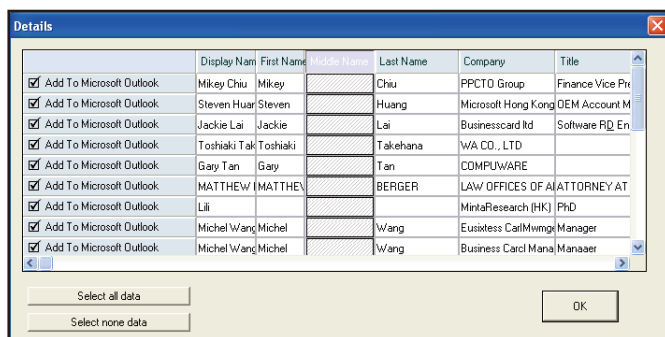


While synchronization occurs, a blue progress bar displays. Once the process is completed, the **Sync Wizard** window will display **Status** and **Information** data about the records you have synchronize.

In the **Status** pane you can see that there is a difference between the Microsoft Outlook database and the **PocketScan** database. The **Information** pane shows all actions that have been completed at this point.

*Note: The Sync function synchronizes the Client database with the Host database. In other words, data in the Client database is changed to reflect the data in the Host database. After clicking Accept, the Client database is to match the Host database. After this point you cannot reverse the process. You may select the PockstScan database to act as either the Host or Client database from the Settings dialog box discussed in section 5.9.2 of this manual.*

You can view the complete details of the actions that will be taken to synchronize the two databases from the **Details** dialog box. To view the **Details** dialog box, click **Detail**. The **Details** dialog box appears.




From the **Details** dialog box, you can click **Select all data** to accept all data in the list as acceptable changes.

For this item, the Sync function would **DELETE** the entry from Microsoft Outlook. Alternatively, you can use the **Select none data** icon to clear the selection of all items in the list. After reviewing the **Detail** list, you may close the **Detail** window by clicking **OK**.

To accept the actions required to synchronize the two databases, click **Accept**. The **Details** dialog box will display the updated **Status** and **Information** panes. To close the dialog box and complete the Sync process, click **Finish**.

## 5.9 Settings

PocketScan has many selectable **Setting** options to allow you to configure the operational functions of **Export**, **Synchronize**, **Field Display**, **User Define Field** and **Scan** options. To set your PocketScan options, use the procedures outlined in this chapter.

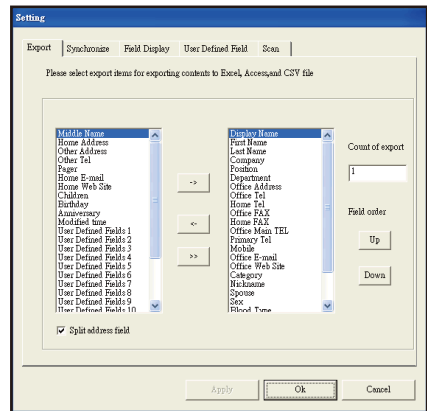
On the **Tool** menu, point to **Setting** and click any of the options. Alternatively, on the main toolbar click the **Setting** button .

### 5.9.1 Export Option

To configure the **Export** options, open the **Setting** dialog box page as described in the preceding section of this chapter.

The **Setting Export** dialog box displays with ALL options selected as a default configuration. The fields on the right will be exported to Excel, Access and CSV files. To add another field, select a field from the left side and click the [**->**] button. Click [**>>**] button to export all fields. You can set the number of fields with the same name to export (up to 10 ).

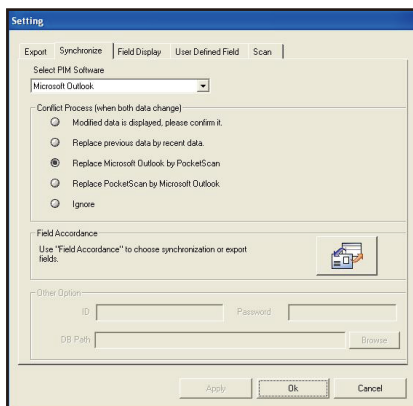
Select **Split address field** to export address detail to different fields. After you've selected the options you want, click **OK** to accept the changes.



## 5.9.2 Synchronize Option

To set the **Synchronize** options, open the **Setting** dialog box as described in the preceding section of this chapter.

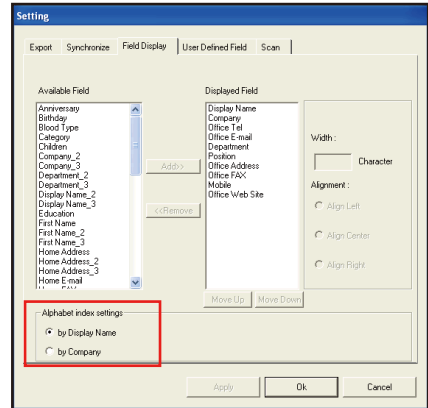
The **Synchronize** tab of the **Setting** dialog box appears with Microsoft Outlook as the selected PIM. PIM stands for **Protocol Information Management** software. Change the PIM as desired. The **Conflict Process** option can be set to manage any conflicts which may occur during the Sync operation.



### 5.9.3 Field Display

To set the **Field Display** options of the List Mode, open the **Setting** dialog box as described in the preceding section of this chapter.

The **Field Display** tab of the **Setting** dialog box appears with a default configuration as displayed in the above window. To modify the selected options, click any available field from the **Available Field** menu on the left side of the dialog box. After a field is selected, click **Add** to add it to the **Displayed Field** list. The selected field will be added to the applicable **PocketScan** screens.



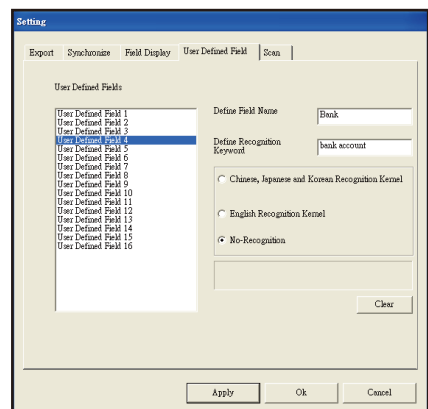
To remove a field, click the desired field in the **Displayed Field** list. Then click **Remove** to delete the field from your PocketScan screen views. You may also set field options from the available options on the right side of the **Field Display** window. Once you have completed your changes, click **Apply** to apply any changes.

The **Alphabet index** can be indexed **by Display Name** and **by Company**. Please refer to **Chapter 3.1**.

### 5.9.4 User Define Field

To configure the **User Defined Field** options, open the **Setting** dialog box as described in the preceding section of this chapter.

The **User Defined Field** tab displays the default configuration as seen in the preceding picture. You may define up to ten user-specified fields to be displayed in your **PocketScan** screens. To define a field, select a **User Defined Field** from the available fields on the left side of the dialog box. Then, assign the **Defined Field Name** and **Define a Recognition Keyword** in the text box. Set the language recognition option and click **Apply**.





### 5.9.5 Scan Option

To configure the **Scan** options, open the **Setting** dialog box as described in the preceding section of this chapter.

The **Scan** tab displays the default configuration as seen in the preceding picture. You may define **Card Style**, **Language** and Scanning method. You can also select **Auto Detection**. Click **Apply** for the settings to take effect.




## 5.10 PocketScan Portable Disk

With Kensington PocketScan, you have a new traveling companion and all the flexibility you need for a successful business trip. You can quickly store your PocketScan Portable software and database on any USB flash disk and access them from the USB port of any available computer.

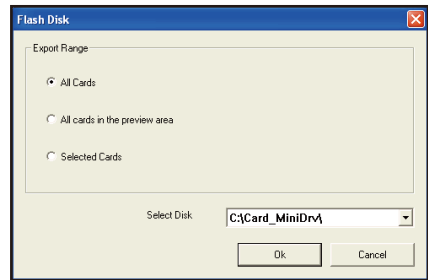
### 5.10.1 Saving Card Data to a Portable Disk

*Note: PocketScan does not come with a flash disk. Flash disk must be purchased separately.*

To save your PocketScan database to a portable disk, at the **Management** window click the **Export to Flash Disk** button . The **Flash Disk** dialog box displays.

In the **Flash Disk** dialog box, select an **Export Range**. Setting the range to the **Selected Cards** option exports only the cards that have been selected in the **Management** window.

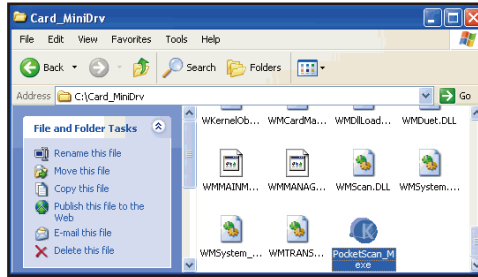
After you have set the **Export Range**, select a **Flash Disk** drive from the **Select Drive** list for available flash drives on your system. After you have selected the correct flash disk drive, click **OK**.



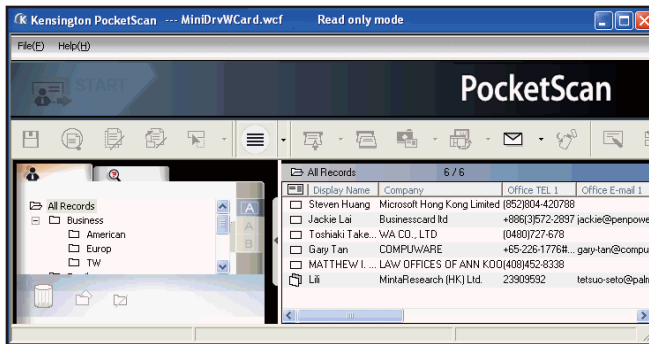
### 5.10.2 Card Data Management for Portable Disk

To use the card data stored on a flash disk, plug the flash disk into the USB port of any computer. Using the My Computer directory of Microsoft Windows, locate the **Flash Disk**.

In the flash disk directory, locate the **Card\_MiniDrv** folder. Double-click the **Card\_MiniDrv** folder. The following directory appears.



Double-click on the **PocketScan\_M** application as highlighted in the above. PocketScan will display the **MiniDrvWCard.wcf Read only mode** as shown in the picture below.




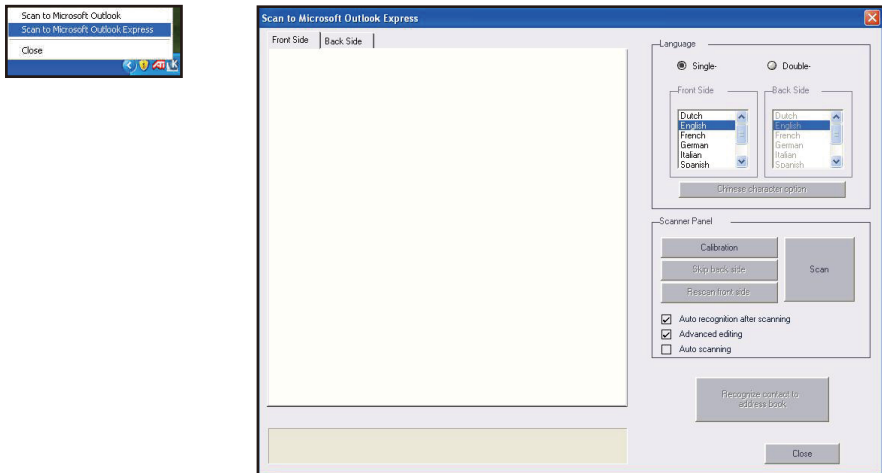
In the **Mini\_Drv mode** you can view cards in **List** or **Label** mode. You can use PocketScan search functions and send email using the same procedures as the standard PocketScan database in the office. For instructions on using any of these available features, see the previous sections of this manual for complete operational instructions.

## Chapter 6 Scan Manager

PocketScan integrates with Microsoft Outlook, Microsoft Outlook Express, Windows Contacts (Vista) . You can scan business cards and save verified contacts into the above programs directly. You can view the original scanned business card image in Microsoft Outlook as well.

### 6.1 Scanning Contacts

After installation, you'll see the **Scan Manager**  icon at the lower right corner on your taskbar. Click it and select the desired software: Microsoft Outlook, Outlook Express, or Windows Contacts. Whenever you click the software, PocketScan opens the scan wizard of the indicated program.



*Note: Microsoft Windows Vista version supports scanning contacts into Microsoft Outlook and Windows Contacts.*

## 6.2 Scan business cards

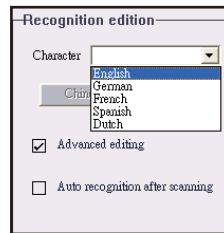
### 6.2.1 Scan and Edit business cards

1. Insert a business card and click the **Scan** button to scan it.

*Tip: The PocketScan software will require you to calibrate the scanner when you use the scanner for the first time. Whenever there is color difference after scanning the card, you can calibrate the scanner by clicking **Calibration**.*

2. Editing Recognition:

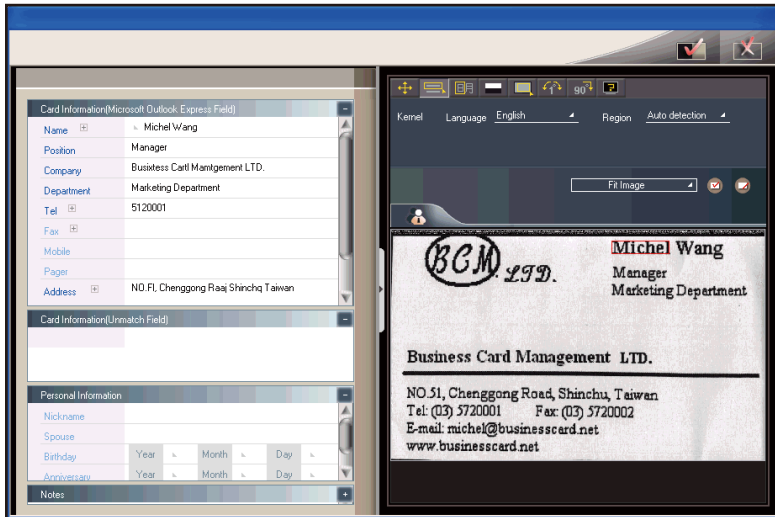
**Character:** Select the language of the business card.



**Auto recognition after scanning:** Select **Auto recognition after scanning** to recognize contacts after scanning. If this option is not selected, you need to click **Recognize content to address book** after scanning.

**Advanced editing:** Select **Advanced editing** to edit contact data before exporting them into address book.

It is recommended that you select **Advanced editing** to edit contact data before exporting contact data into address book. Regarding the editing functions, please refer to **Chapter 4**.

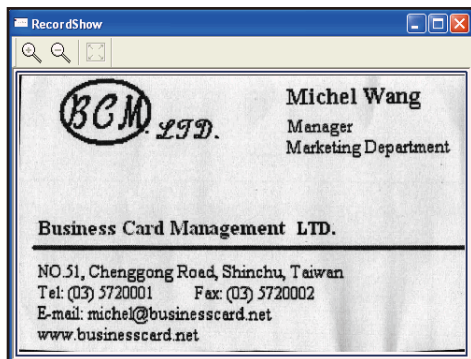


Because Microsoft Outlook Express provides limited set of fields you may see **Card Information (Unmatched Field)** on the left pane of the **Editing** window. It lists the contact data of unmatched fields. These data will not export to the address book of Outlook Express. You can click the field name to replace the field that is unmatched. Click **Export to Address Book** after confirming all data.



## 6.2.2 View business card image

You can view the image of the business card by just selecting the exported contact from your address book in Microsoft Outlook, and right-click to select view attachment. You can magnify the image of the business card.



*Note: PocketScan does not support viewing business card images in Microsoft Outlook Express and Windows Contacts (Vista).*

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## FAQ

**Q: How can I convert the files in earlier version to v6.X format?**

A: PocketScan v6.x can convert your v5.x version files and import them in v6.x format. (For v3.0, v4.0 CRD format, support is not available at this moment.) On the **File** menu, click **Import** and then **PocketScan file** to convert the files to v6.x format. You can also use the **Start-Up Wizard** to accomplish this task.

**Q: Why are there dark lines on the scanned pictures of business cards, or all scanned pictures turn out blank?**

A: Before you use PocketScan the first time, you'll be asked to complete Calibration. If the problem still exists after calibrating, on the **Tool** menu, click **Calibrate the scanner** to proceed with calibration. You can also use **Calibrate the scanner** in the scan wizard for calibration.

**Q: How do I backup business card files?**

A: On the **File** menu, click **Export** and click **PocketScan files** (v6.0 or later) to back up files.

**Q: How can I protect my business card files from being opened by other persons without my permission?**

A: On the **File** menu, click **File encryption** to encrypt files. Other persons have to type in your predefined password to open the encrypted files.

**Q: How do I combine two pieces of business card data into one?**

A: Hold down CTRL and click the left mouse button to select two single-sided business card picture files or the image-less data of the card. Then right-click, click **Combine**, and set either one to be the front side of the data combined.

**Q: How do I separate a single picture file with data including the business card information of front and rear sides into two separate data files?**

A: Select the data including the business card information of front and rear sides, right-click, then click **UnMerge**.

**Q: How do I add the signature information in e-mails to the business card files?**

A: Select the signature or business card information in e-mail or a Word file. Then drag it directly to the main Card window to finish.





# **Kensington PocketScan User Manual**

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Version: 6.2

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