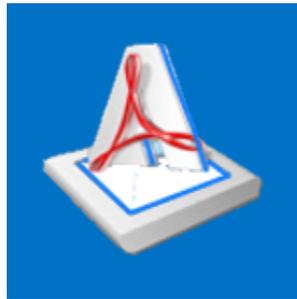




Solutions for information workers

Scan, PDF and OCR Add-in

for SharePoint Online (Office 365)



Administrator and User Guide

Version:

Server 21.0.0; Client 2022.0.x

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Overview

SharePoint Scan, PDF and OCR Add-in is a powerful tool for scanning and composing documents from existing images or PDF files directly into a document library.

With easy-to-use interface of the Add-in, your employees will be able to scan documents right away allowing you to save on training your staff.

The Add-in supports:

1. OCR allows to convert image to text (more than 50 languages)
2. Properties recognition - Zonal OCR
3. Barcode recognition
4. Automatic upload of files from the folders on the local computer to SharePoint
5. Scanning multiple documents in a single batch using document separator sheets or barcode separation
6. Saving pages as:
 - Single document
 - Document per page
 - Multiple documents using document separator sheets
7. Document composing from the existing image or PDF files
8. Regular and Quick Scan modes
9. PDF, TIFF, JPEG, PNG, BMP and GIF output formats.
10. Advanced compression technologies enabling best document quality with smallest file size
11. All types of Windows-compatible scanners: simple desktop and professional scanners with feeders, local-connected (USB) and network-connected (IP) scanners.
12. All major browsers (Edge, Chrome, Firefox).
13. Multilingual user interface (English, Arabic, Czech, German, Hebrew, Russian)

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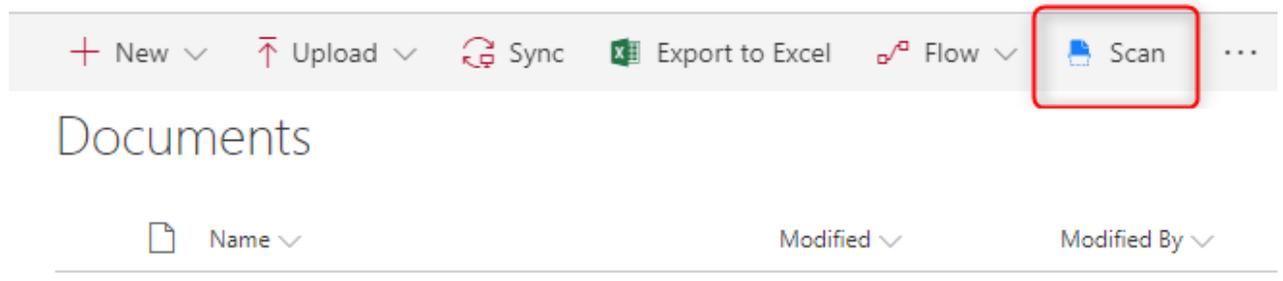
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Supported OCR languages:

English, Afrikaans, Albanian, Arabic, Azerbaijani, Basque, Belarusian, Bengali, Bulgarian, Catalan, Cherokee, Chinese Simplified, Chinese Traditional, Croatian, Czech, Danish, Dutch, Esperanto, Estonian, Finnish, Frankish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Icelandic, Indonesian, Italian, Japanese, Kannada, Korean, Latvian, Lithuanian, Macedonian, Malay, Malayalam, Maltese, Norwegian, Persian, Polish, Portuguese, Romanian, Russian, Serbian, Slovakian, Slovenian, Spanish, Swahili, Swedish, Tagalog, Tamil, Telugu, Thai, Turkish, Ukrainian, Vietnamese

Picture 1

Scan, PDF and OCR Add-in has native integration with SharePoint Document Library menu (Optional. You can save documents to SharePoint from the eDocStation itself)



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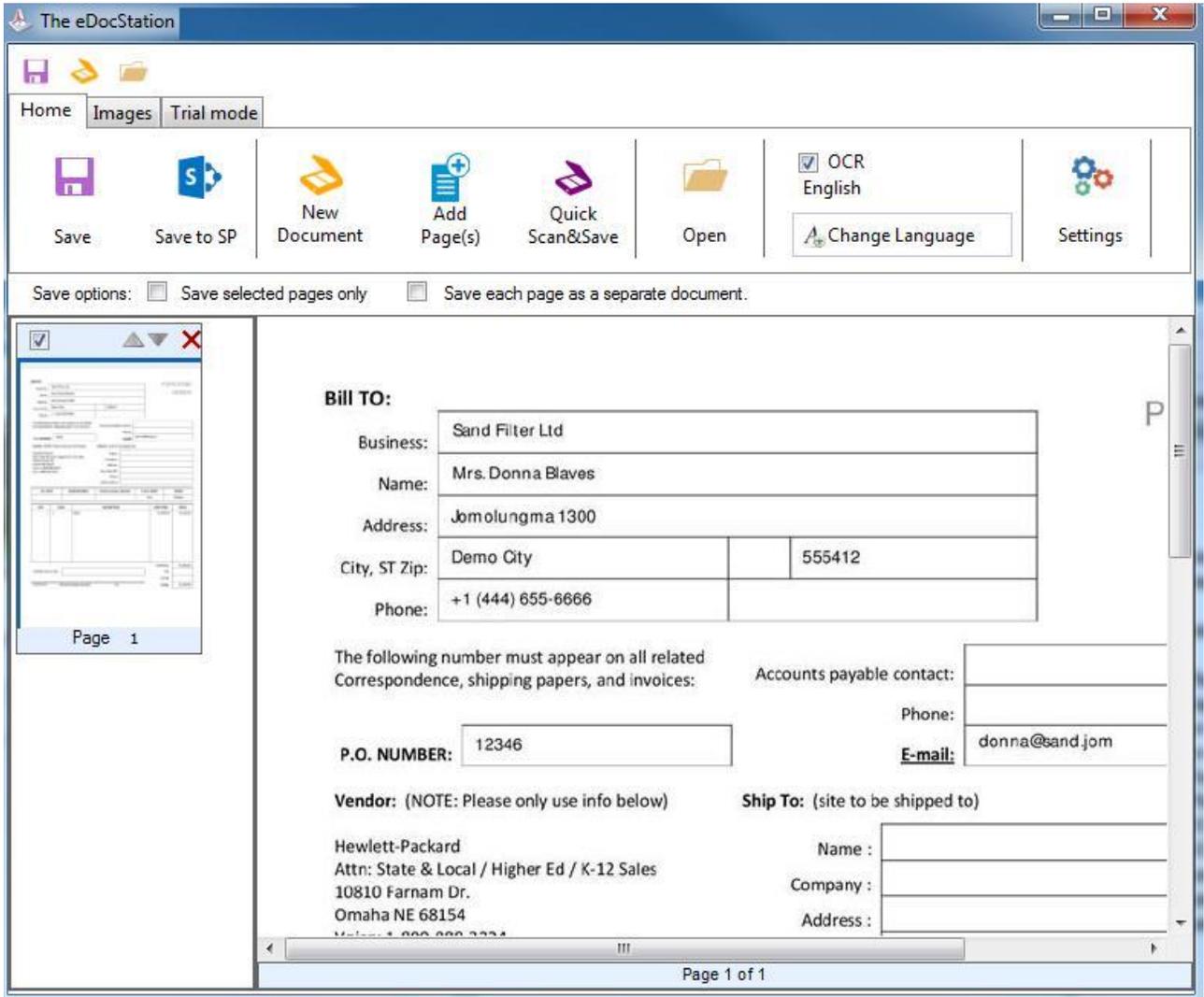
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Picture 2

Client part of the Add-in - The eDocStation



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Requirements

Server Requirements

- Microsoft SharePoint Online (Office 365)

Client Software Requirements

- Windows 7 / 8 / 10 / 11
- Microsoft Edge / Chrome / Firefox
- Microsoft .NET Framework 4.5.2 +

Scanner Requirements

Local-connected and network-connected scanners have to be correctly defined on the workstation. Usually it is enough to install correct scanner drivers. Please refer to your scanner documentation.

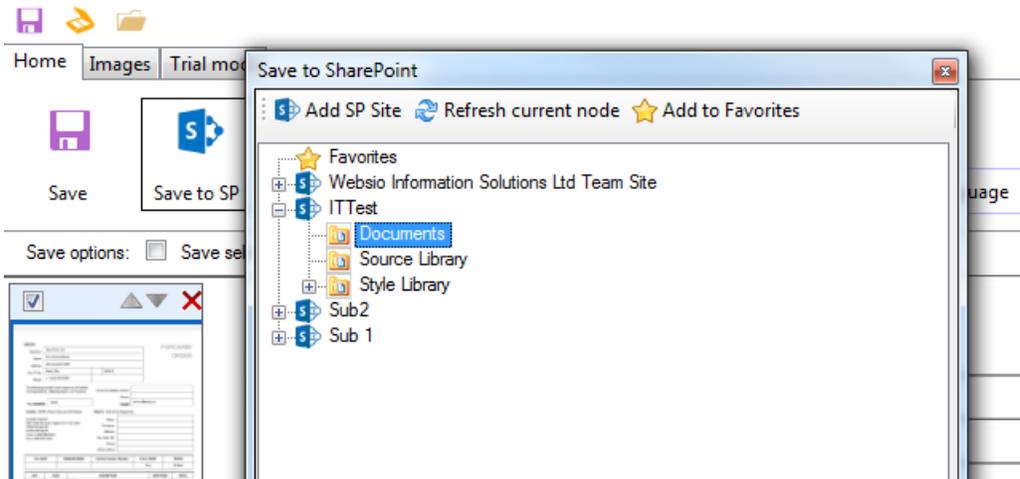
To test that your scanner is correctly defined, try to scan from one of the standard Microsoft programs like Paint or Microsoft Clip Organizer

Installation

What do I need to install?

Installation set contains two parts: server-side and client side (the eDocStation).
The eDocStation is required.

You can use the eDocStation as a standalone application without server-part and save documents into a SharePoint library:

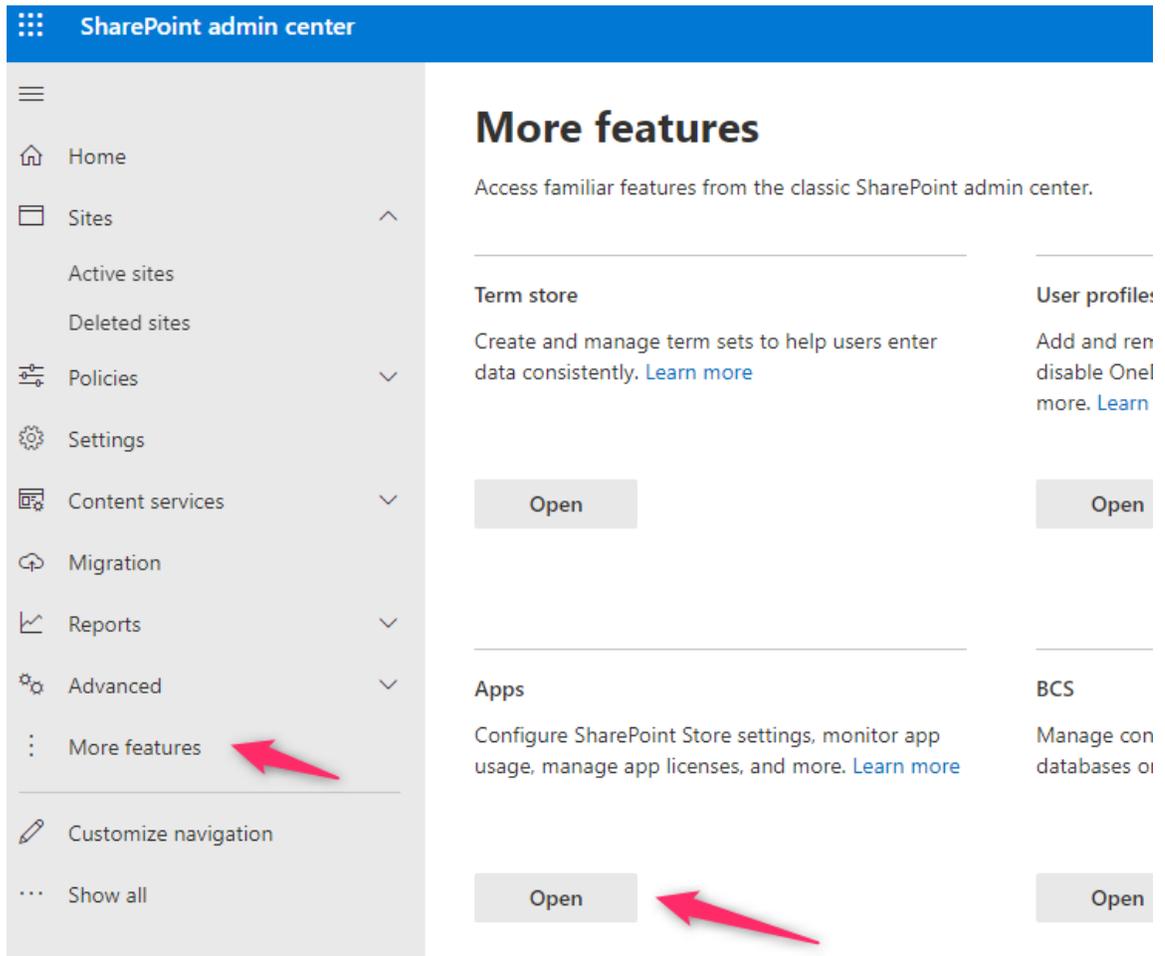


Server-side adds following functionality:

1. Start the eDocStation from the SharePoint document library and store final document to the same library
2. Use Zonal OCR (properties recognition). See section "Properties Recognition - Zonal OCR" for details

App installation

1. Unzip "ScannerPlugInApp.app" from directory "app"
2. Go to **More features** in the SharePoint admin center and sign in with an account that has admin permissions for your organization. Under Apps, select Open.



SharePoint admin center

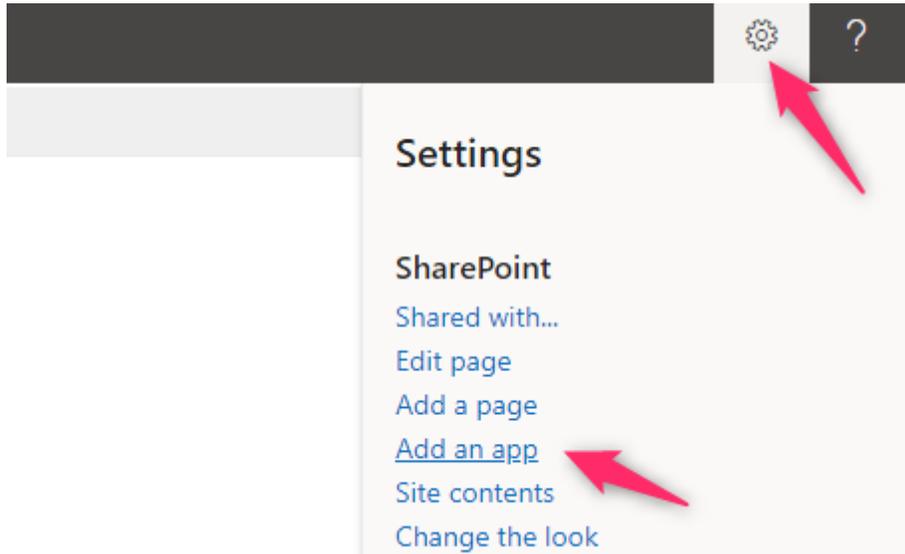
More features

Access familiar features from the classic SharePoint admin center.

Term store Create and manage term sets to help users enter data consistently. Learn more	User profile: Add and ren disable Onel more. Learn
<input type="button" value="Open"/>	<input type="button" value="Open"/>
Apps Configure SharePoint Store settings, monitor app usage, manage app licenses, and more. Learn more	BCS Manage con databases oi
<input type="button" value="Open"/>	<input type="button" value="Open"/>

3. On the Manage apps page, select Upload, and browse to the app, or drag the app into the library. On the next screen click "Enable"

4. Open site where you want to use the Add-in, click on the “Settings” -> “Add an App”



5. Add “Scan, OCR and PDF 365”

[← Back to Amuta My Best Friend Team Site](#)

My apps

Filter

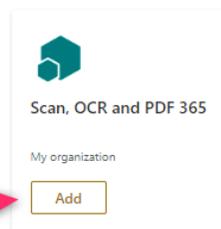
All

From my organization

From SharePoint Store

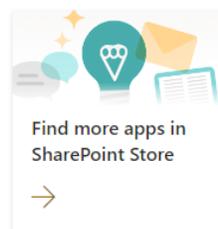
Apps you can add

These are SharePoint Store or custom apps allowed by your organization. Be in the classic experience.



Scan, OCR and PDF 365
My organization
Add

A red arrow points to the "Add" button.



Find more apps in SharePoint Store
→

6. Trust the App



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Client installation

1. Unzip directory "eDocStation" on your client machine
2. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the installation.
3. Windows Firewall alert may appear during installation. Approve network access for eDocLoader.exe. The eDocLoader does not access any external internet resources and is responsible for communication with SharePoint only.
4. **Please pay attention!** The Add-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site: :
<http://websio.com/ocrlangpacks.aspx>



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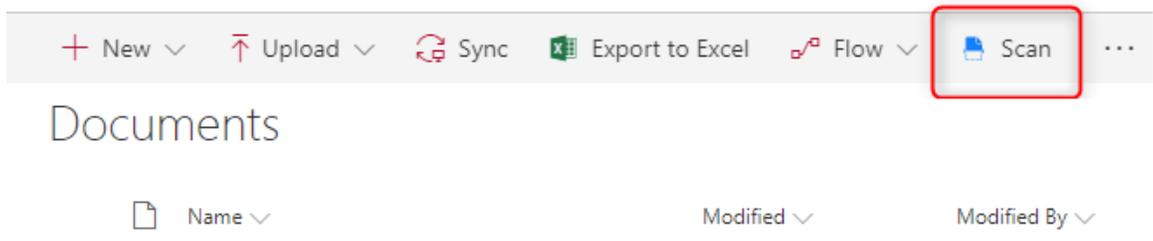
After the installation has been completed:

1. Icon of the eDocClient appears in the system tray of the client workstations:



Please, do not close the eDocClient. This program is responsible for communication between client part of the Add-in and SharePoint.

2. New button appears in the SharePoint library menu:

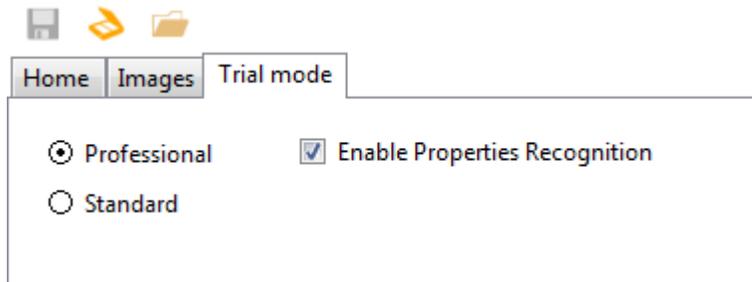




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Trial version

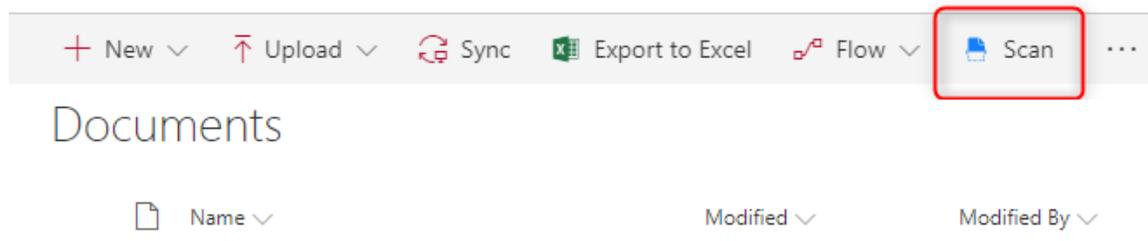
You can switch between Standard and Professional modes during Trial period. Properties recognition may be activated in the Professional mode. See section “[Properties Recognition - Zonal OCR](#)” for details.



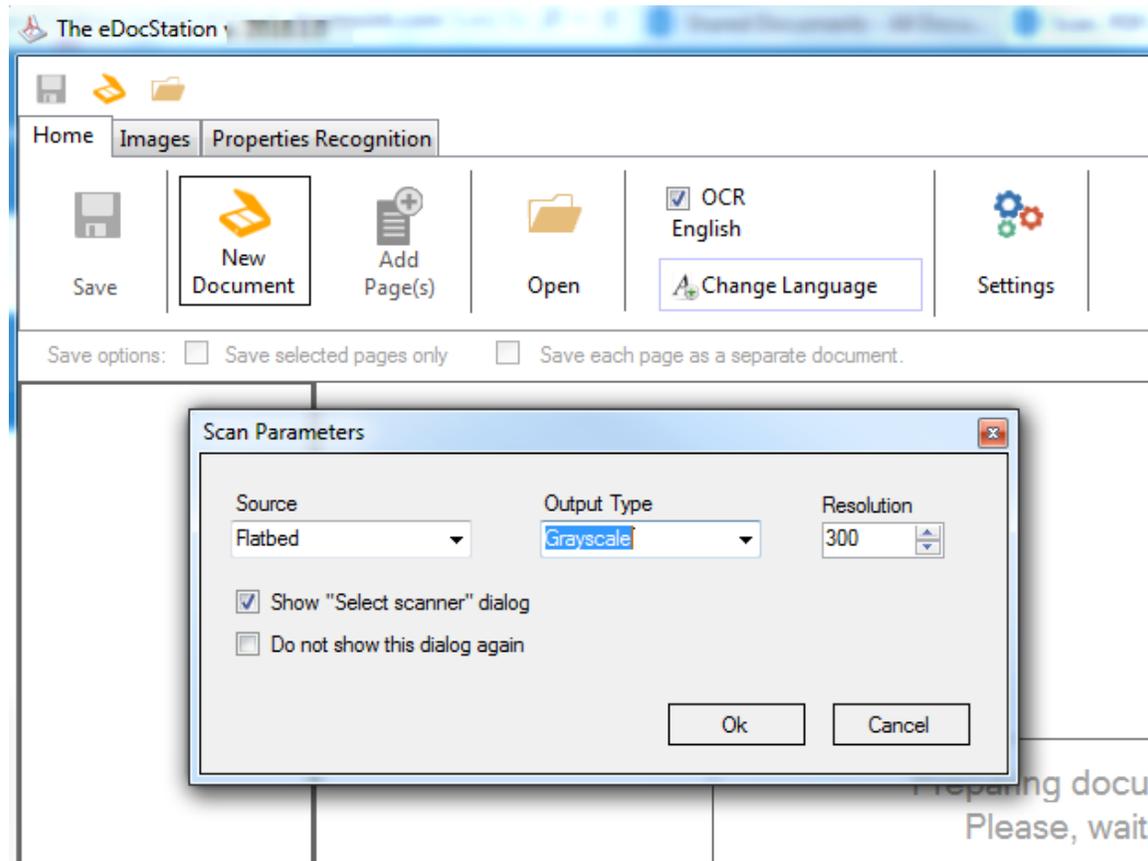
How to use

Option 1. Start process from SharePoint

Open document library and select "Scan"



The eDocStation will be opened in the SharePoint mode. Click on the "New Document", select scanner and scan parameters

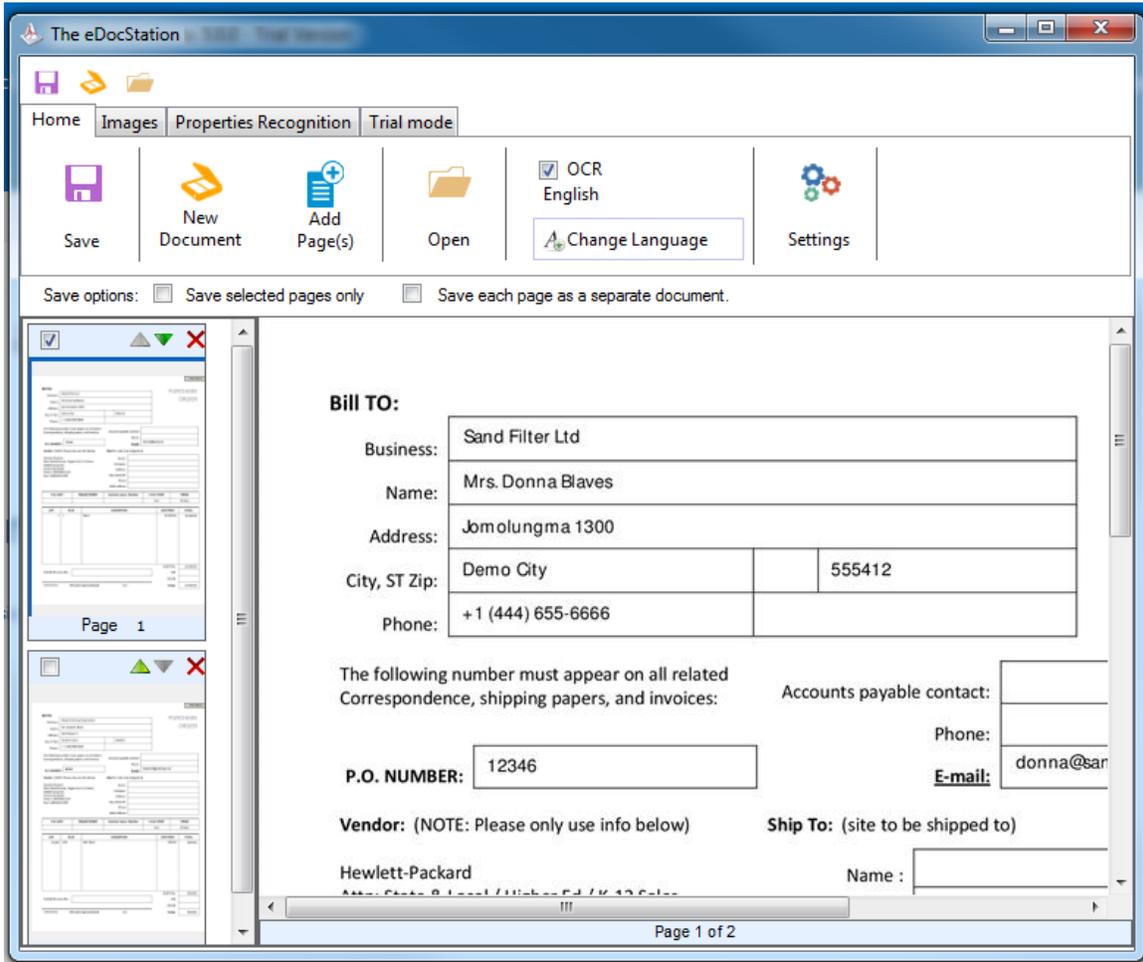




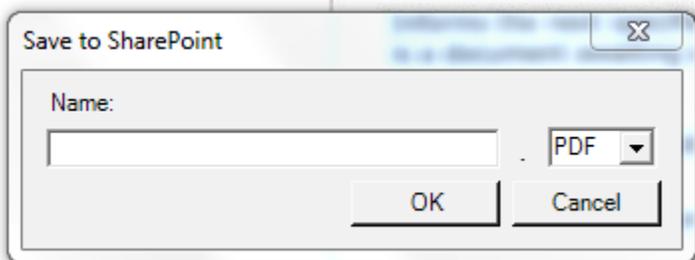
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Select default scanner and scan parameters in the eDocStation settings to avoid these dialogs.

Scanned pages:



Click on the "Save" button, enter document name and select format



Select option "Always use auto name" in the eDocStation settings to avoid this step.

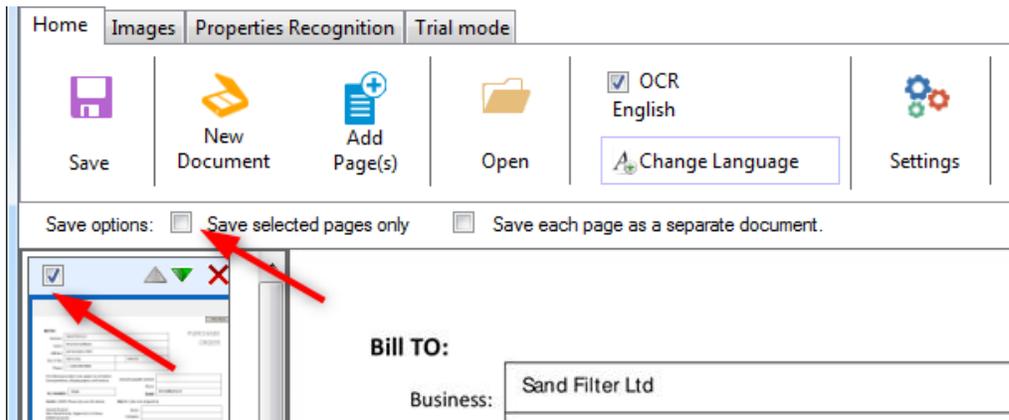


Solutions for information workers

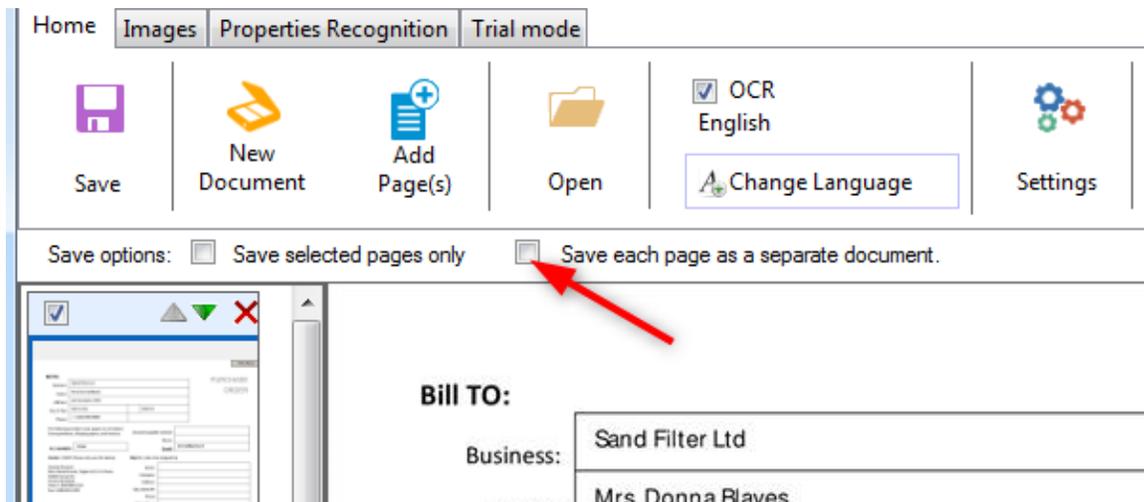
Created document will be saved in the SharePoint Document library.

Additional save options:

1. Save selected pages only:
 - 1.1. Select checkbox "Save selected pages only"
 - 1.2. Select pages
 - 1.3. Click on the button "Save"



2. Save each page as a separate document:



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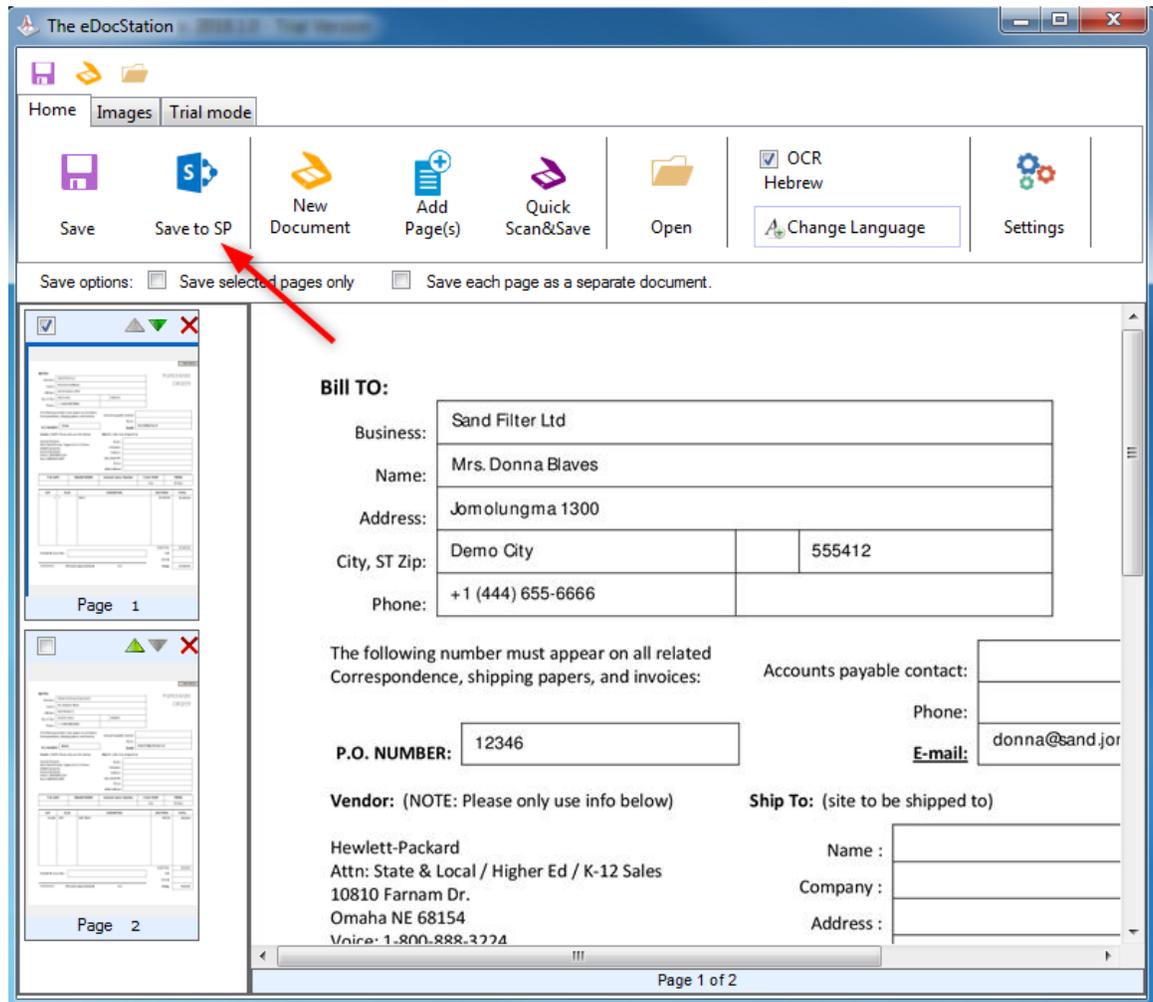
<http://www.websio.com> sales: sales@websio.com support: support@websio.com



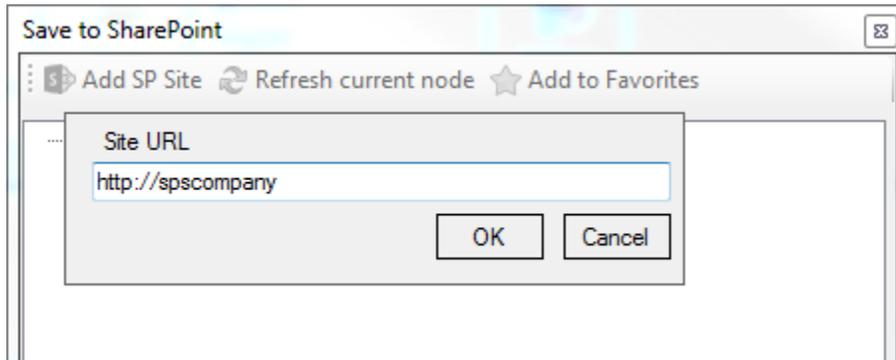
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Option 2. Use the eDocStation as a standalone-application

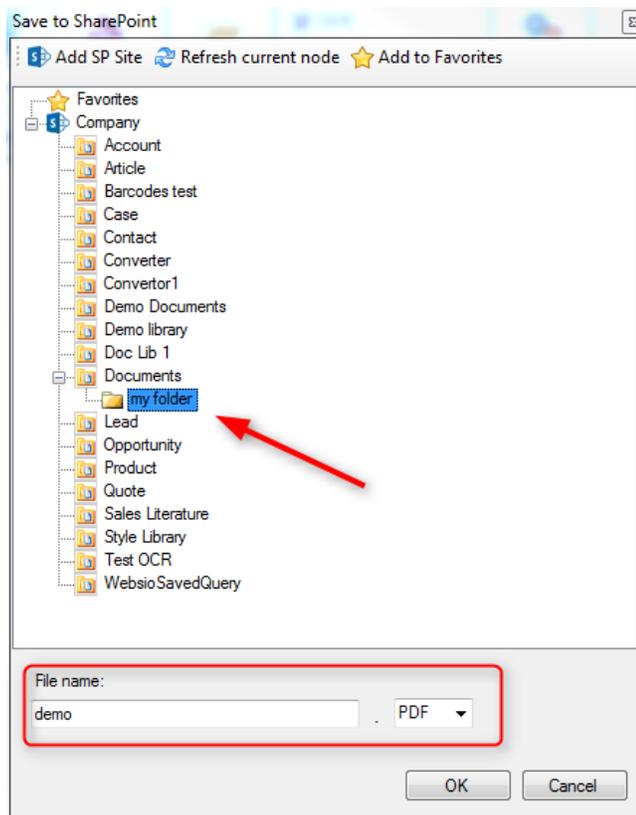
1. Use desktop shortcut  in order to launch the eDocStation. Scan or compose document as described in the previous section "[Option 1. Start process from SharePoint](#)"
2. Press on "Save to SP"



3. "[Save to SharePoint](#)" dialog will be opened. If you're accessing this window for the first time, you'll be prompted to enter site url:



4. Wait until list of libraries will be displayed
5. Select library or folder, enter file name and press “OK” in order to save document to the selected location

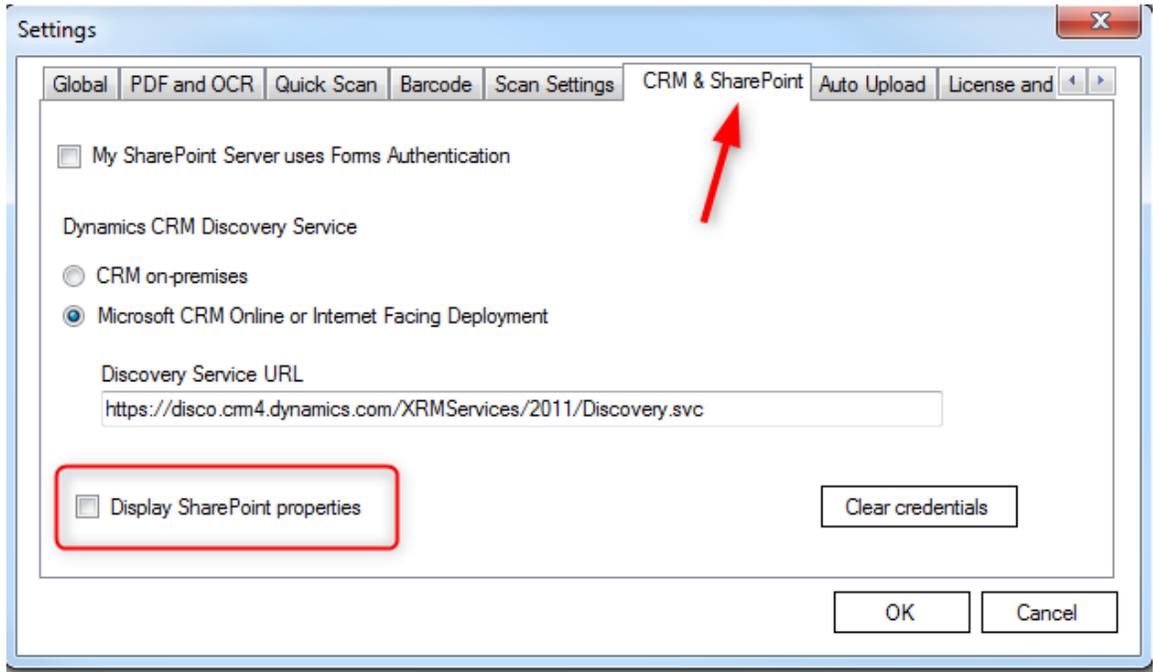


See section [“Save to SharePoint Dialog”](#) for additional information



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6. Important! Select option “Display SharePoint Properties” to display document properties after upload.



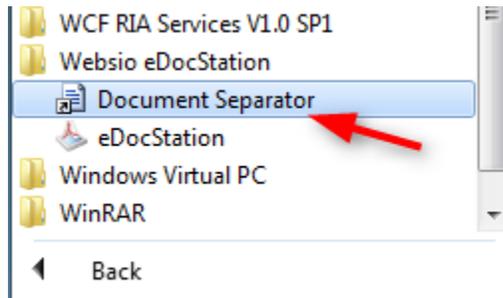


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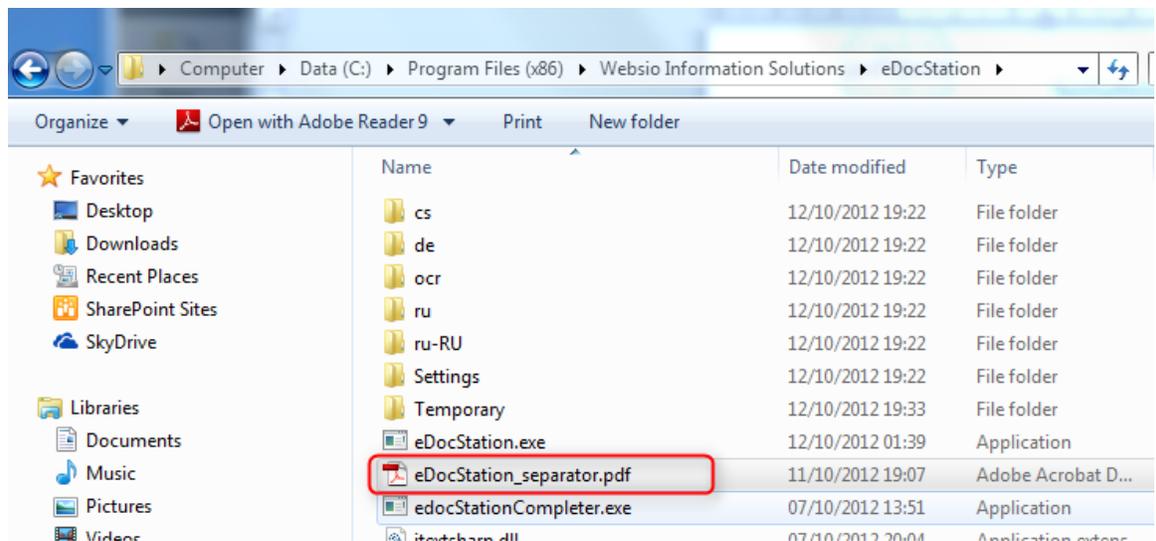
Document Separator Sheets

A separator sheet allows the scan application to detect when a new document should be started. It helps the scan operators to increase productivity and organize a stack of paper into logical documents. That eliminates the need for individually scan of each document either.

1. Select option "Use Document Separator Sheets" in the eDocStation settings
2. Print Document Separator Sheet:
 - a. Open Document Separator Sheet from the "Start->All Programs -> Websio eDocStation"



or from the eDocStation installation folder

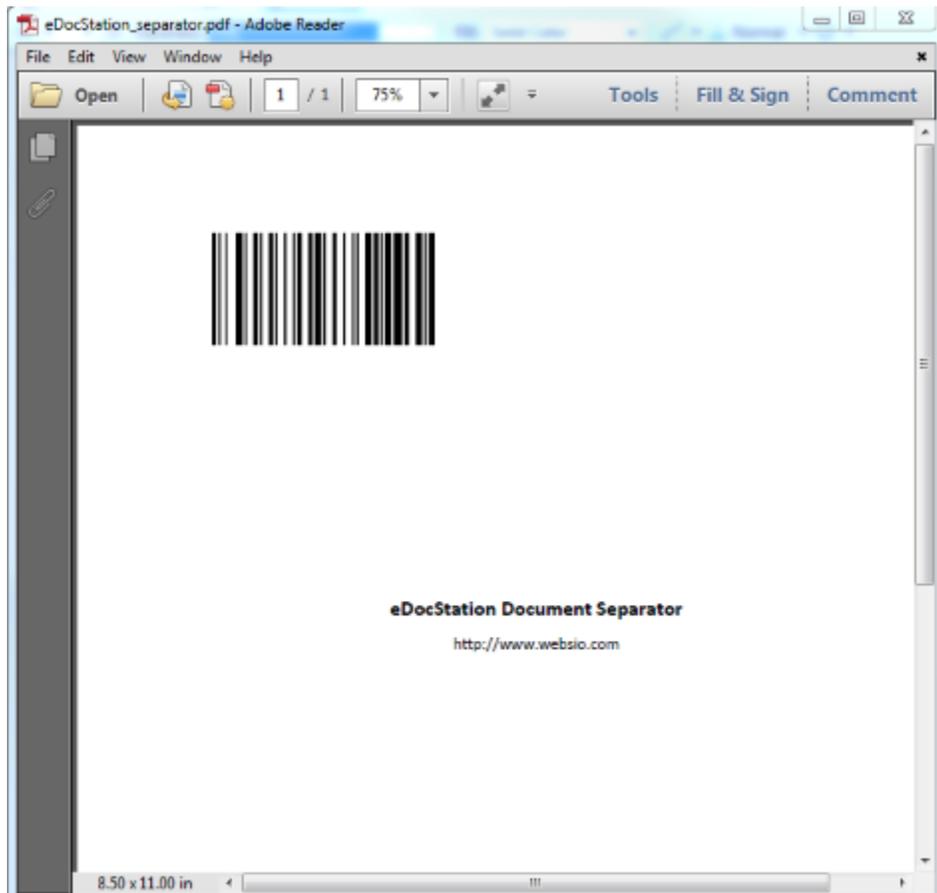


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- b. Print Separator Sheet in A4 format in a high quality.
3. Separate documents in the scanner feeder by previously printed sheets
4. Scan documents using the Add-in. Quick Scan mode is recommended but not required.

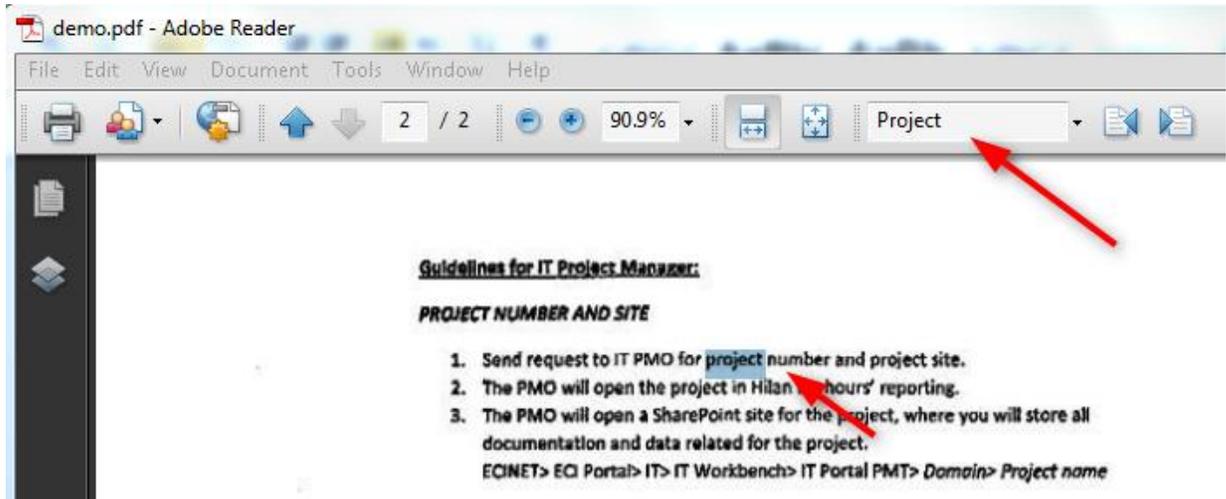


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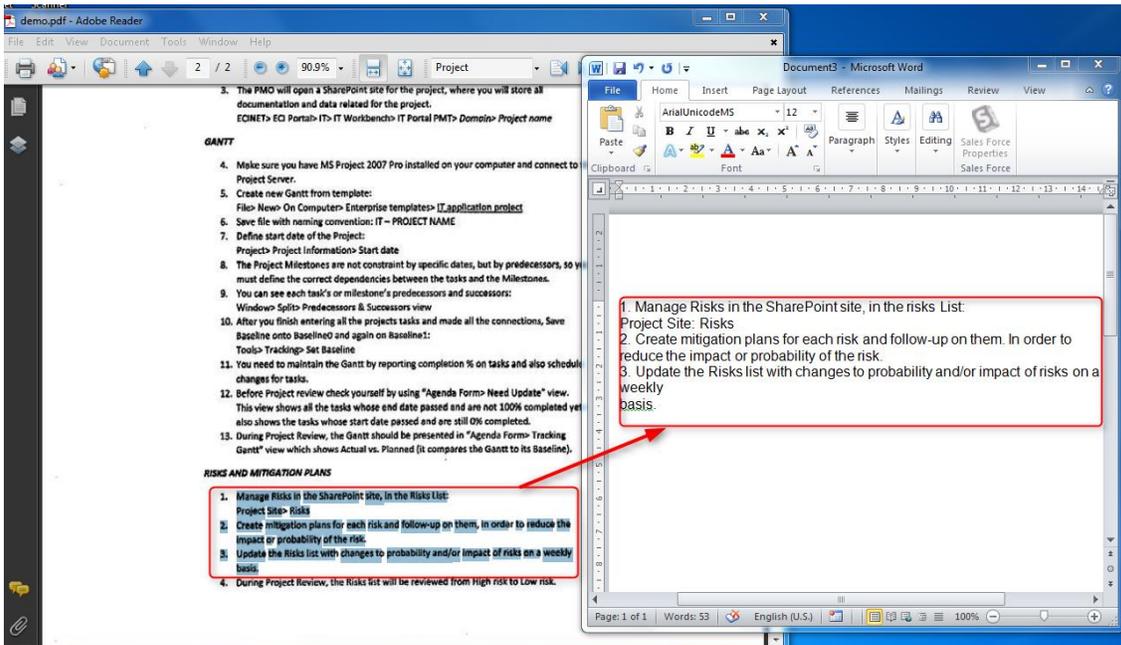
OCR – convert images to searchable PDF

Searchable PDF (document created using OCR process) advantages:

- a. Search documents by content using standard SharePoint search engine
- b. Search text in the document:



- c. Copy text from the document:



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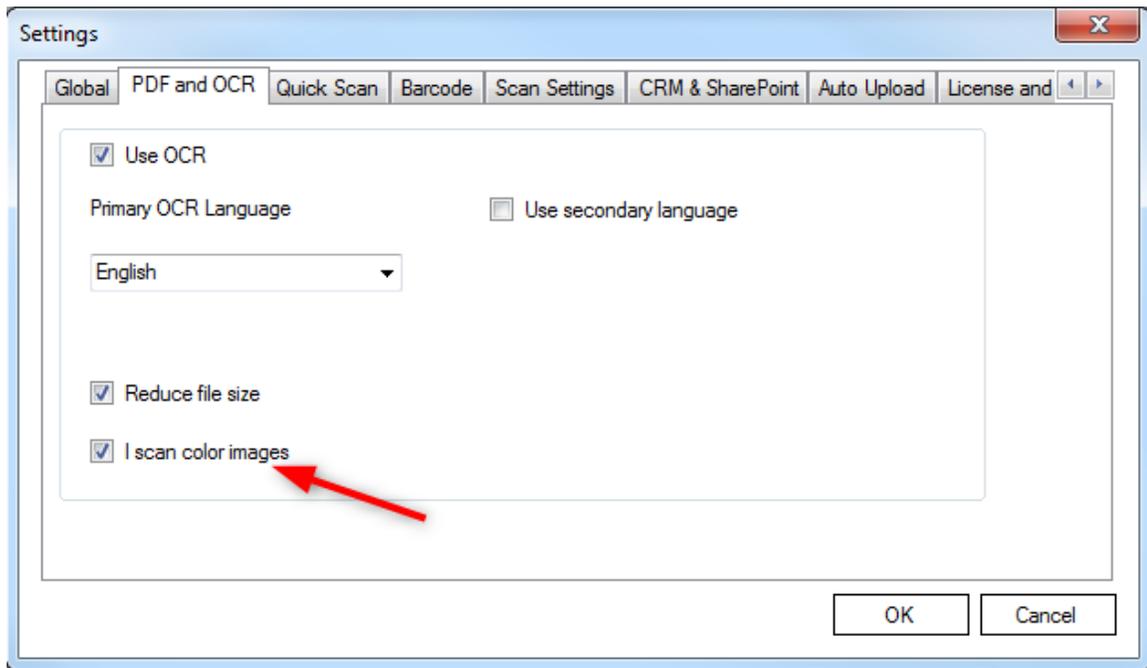
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The best OCR (text recognition) quality can be reached for images scanned in grayscale with 300 dpi resolution.

Important! If you want to OCR color images, select option "I scan color images" in the eDocStation settings



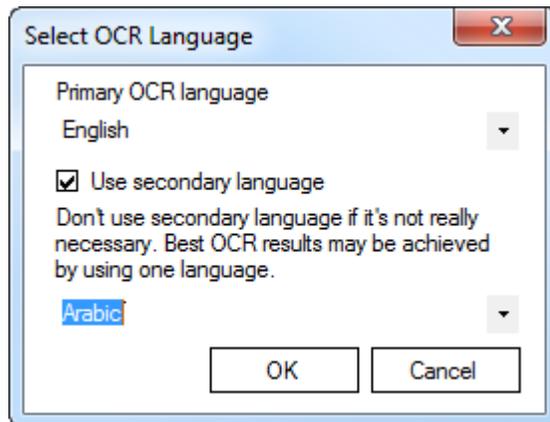
1. Select checkbox "OCR" and document language(s) to create searchable document.



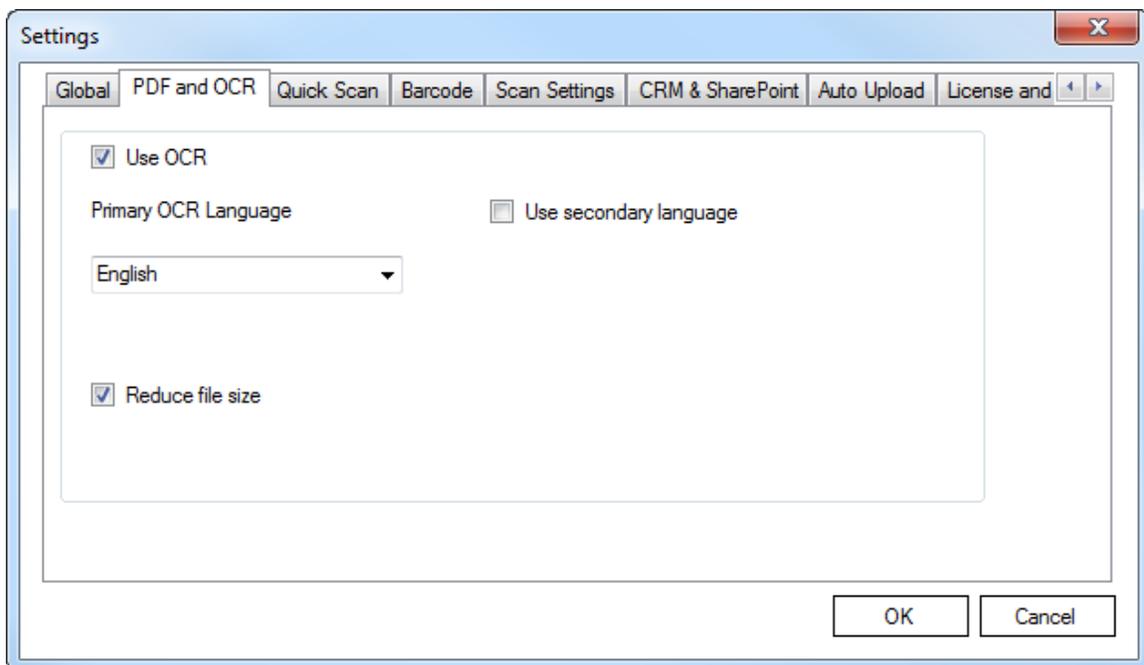
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.



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Set default OCR parameters using eDocStation settings:



Important! SharePoint Scan, PDF and OCR Add-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site: <http://www.websio.com/ocrlangpacks.aspx>

2. OCR process runs during document save process. The process may take some time, depending on the pages count and original images quality.



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3. Our products use one of the best Optical Character Recognition (OCR) engines "Tesseract". Tesseract development has been sponsored by Google since 2006. We developed set of optimizing image procedures for best OCR recognition. These functions provide cardinal improving of the OCR results. At the same time Tesseract engine may not recognize some specific fonts. The best results may be achieved for standard Microsoft Office fonts with size from 9 to 13 px. Please pay attention, we use Tesseract OCR as-is and we cannot add support for unrecognized symbols/fonts/languages



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Properties Recognition - Zonal OCR

This feature enables automatic properties recognition and assignment. We highly recommend for you to watch demo video available on the product page: <http://www.websio.com/spscanocr.aspx>

Examples.

Task: scan order, recognize Order ID, Customer and Amount, save document to SharePoint and assign recognized values to document properties.

Destination document library properties:

Columns

A column stores information about each document in the document library. The following

Column (click to edit)	Type
Title	Single line of text
Order ID	Single line of text
Customer	Single line of text
Amount	Currency
Created	Date and Time
Modified	Date and Time
Created By	Person or Group
Modified By	Person or Group
Checked Out To	Person or Group

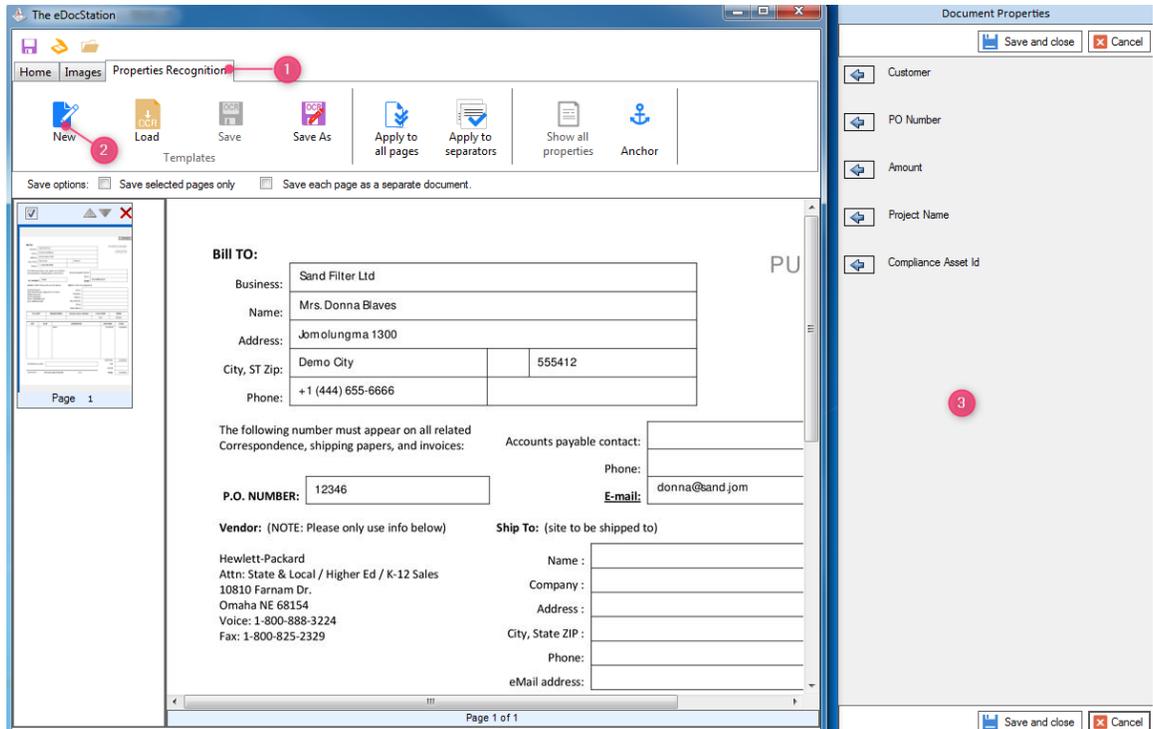
Important! Zonal OCR supports text, number and currency field types only.



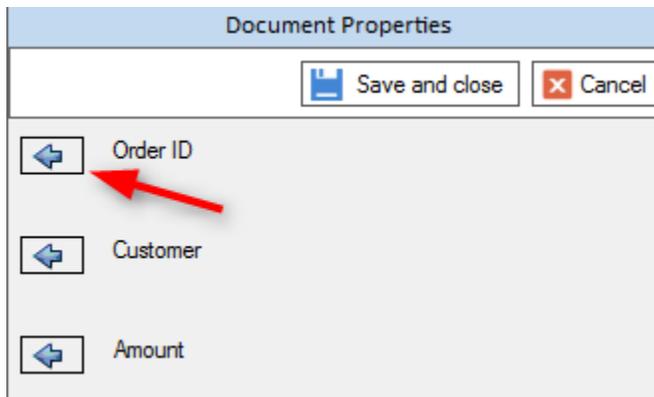
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Example 1. Manual recognition

1. Scan document, open tab “Properties Recognition” (1) and click on the “New” (2). Document properties pane (3) will be displayed. The pane contains supported properties from the current library.



2. Click on the arrow or drag property to the scanned image surface.



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3. Drag and resize property placeholder to fit actual text on the picture

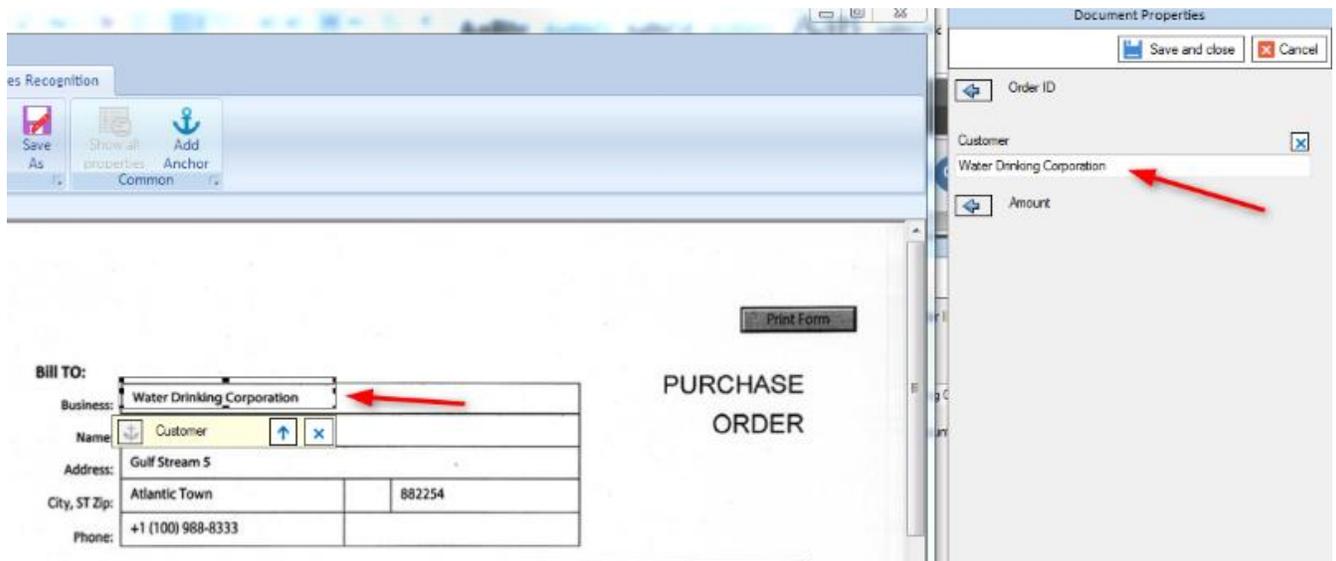


Customer

Bill TO:

Business:	Water Drinking Corporation	
Name:	Mr. Dolphin Shark	
Address:	Gulf Stream 5	
City, ST Zip:	Atlantic Town	882254
Phone:	+1 (100) 988-8333	

4. Recognized text appears on the Properties Pane under property name. Edit value if necessary.



Document Properties

Save and close Cancel

Order ID

Customer

Water Drinking Corporation

Amount

Print Form

Bill TO:

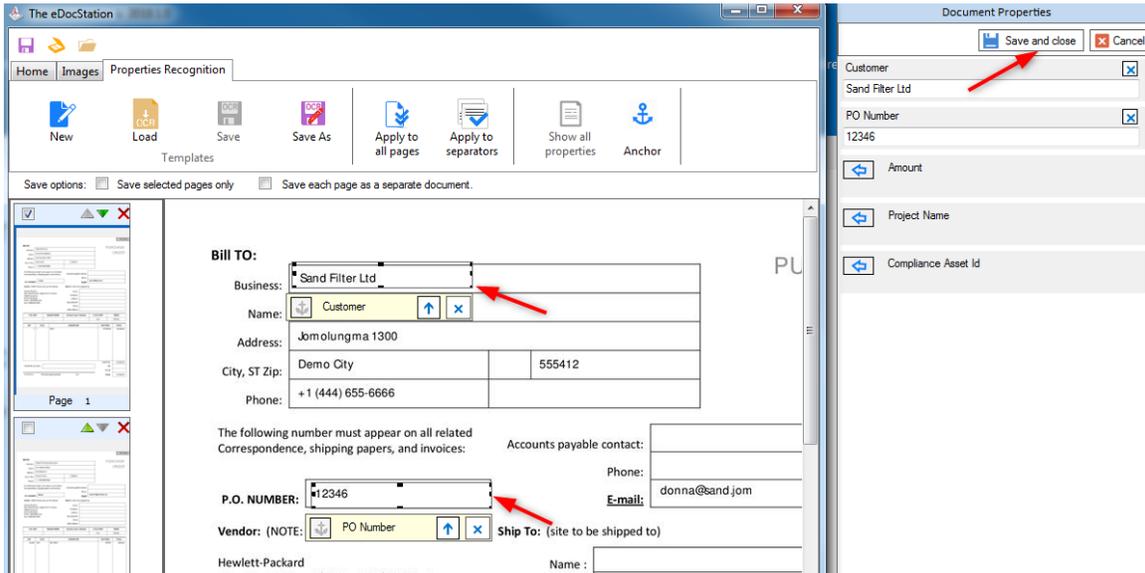
Business:	Water Drinking Corporation	
Name:	Customer	
Address:	Gulf Stream 5	
City, ST Zip:	Atlantic Town	882254
Phone:	+1 (100) 988-8333	

PURCHASE ORDER

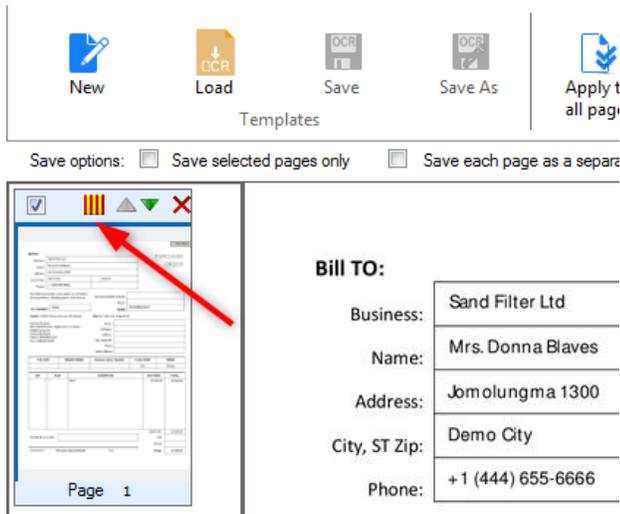


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5. Position other properties, click “Save and close”

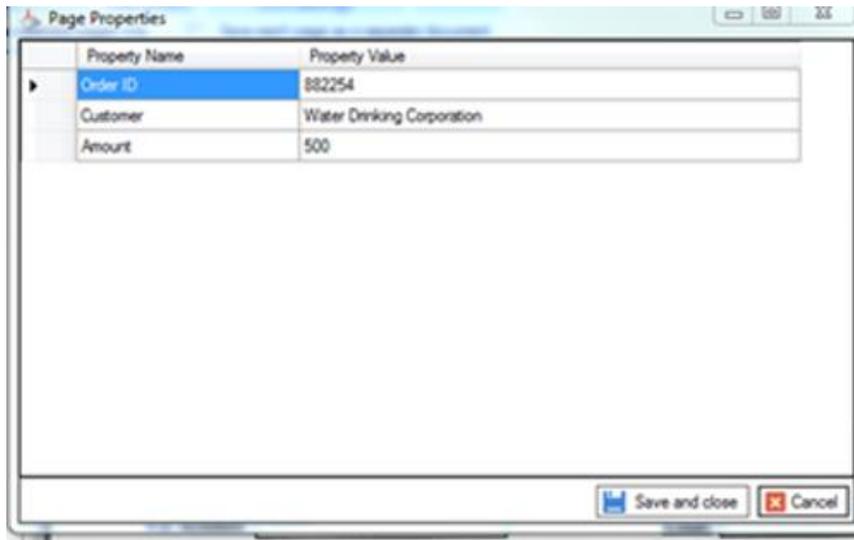


6. You'll see a new button on the page thumbnail:

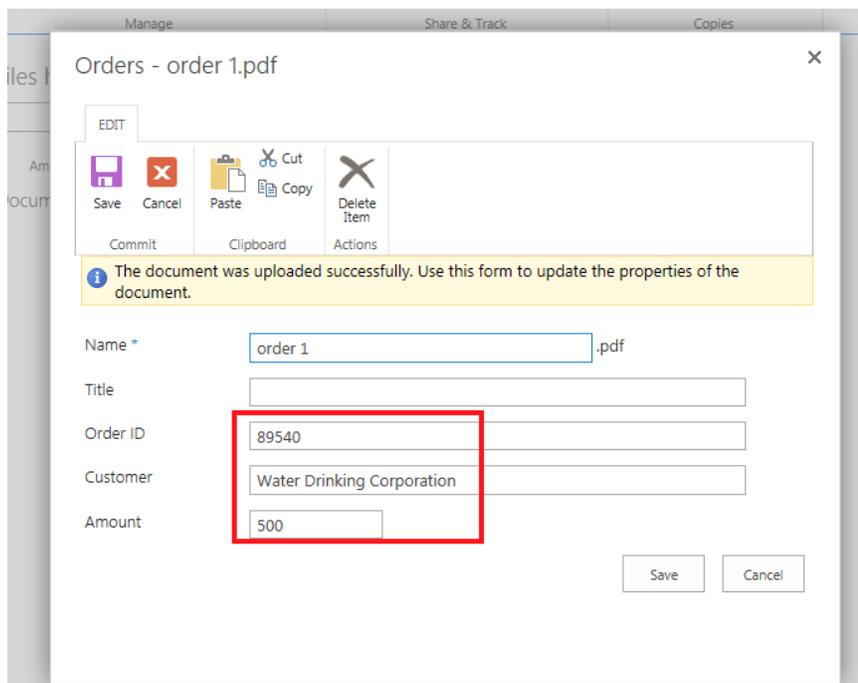


7. Use this button to review and edit page properties values

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8. Save document. Result:



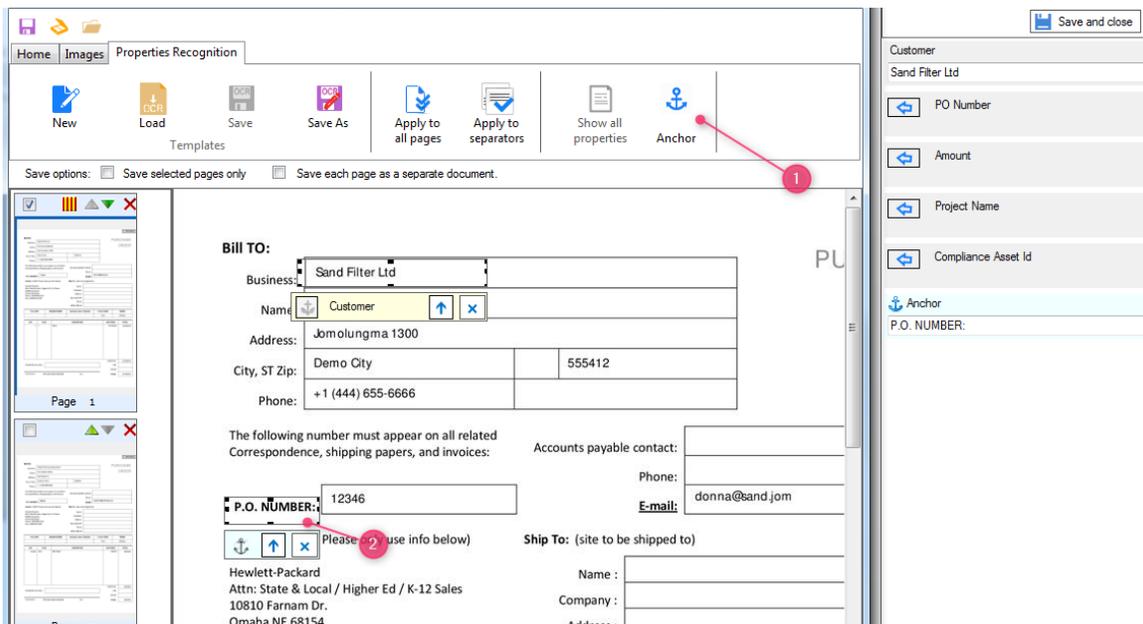


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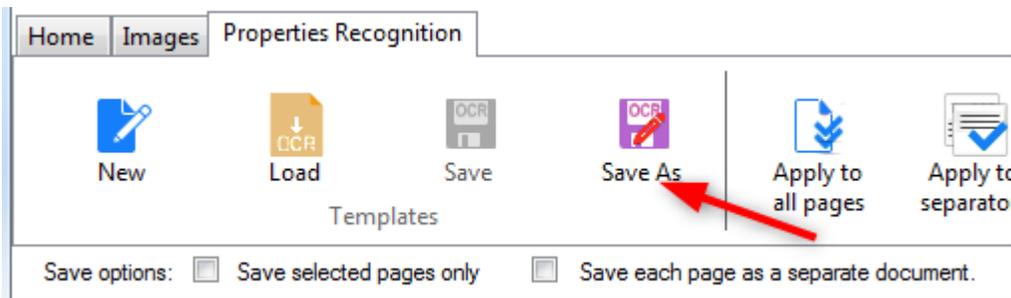
Example 2. Templates

How to create template

1. Scan document and position placeholders as described in the previous example.
2. Add anchor. Anchor stores position of the selected text and text itself. When you apply template for the document, the eDocStation searches for the anchor's text and corrects position of the fields. Try to find unique single word or short phrase for anchors. Add two anchors for the best positioning.



3. Save template

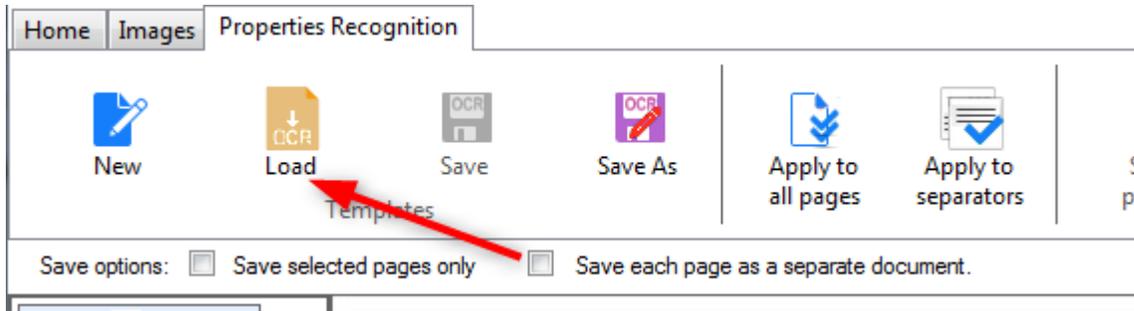


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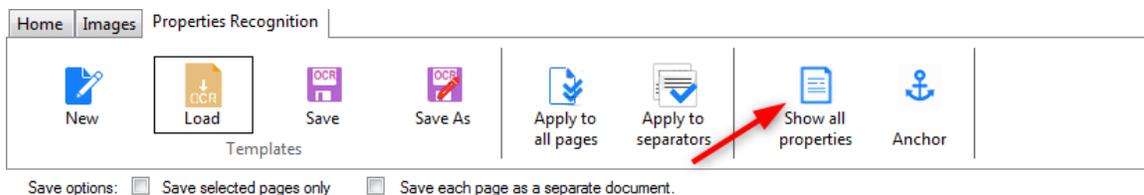
<http://www.websio.com> sales: sales@websio.com support: support@websio.com

How to use previously saved template

1. Scan or load the image you have previously saved
2. Press on the button “Load”
3. Select template from the list



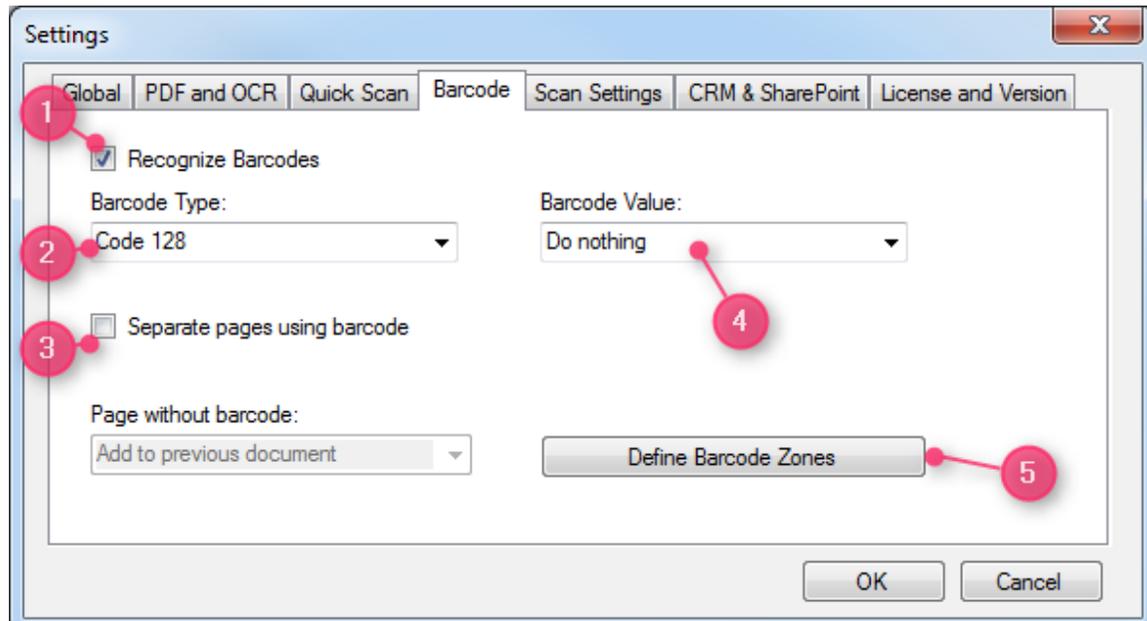
4. The template will be loaded and placeholders will be positioned automatically. Adjust placeholders positions and/or edit properties values if necessary.
5. Please pay attention, the eDocStation displays only properties saved in the template. If you want to add properties from the current library but not stored in the template, use button “Show all properties”



6. Save properties and save document as described in the “Example 1. Manual Properties Recognition”.

Barcodes

Use Barcode tab of the Settings window to define barcode recognition settings.



Turn barcode recognition on

Select checkbox "Recognize barcodes" (1) and select barcode type (2)

Separate pages using barcodes

Barcode-based pages separation allows the scan application to detect when a new document should be started. It helps the scan operators to increase productivity, allowing them to organize a stack of paper into logical documents. That eliminates the need to scan each document separately.

Select checkbox (3) to activate this option.

You can select behavior for pages without barcodes using option "Page without barcode" (5):

1. Add to previous document
2. Save as a separate document

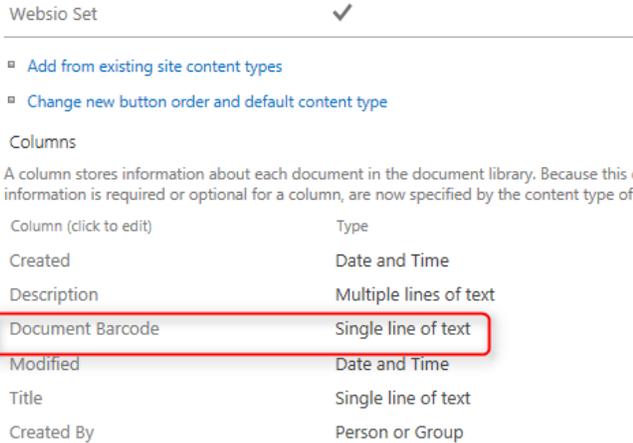


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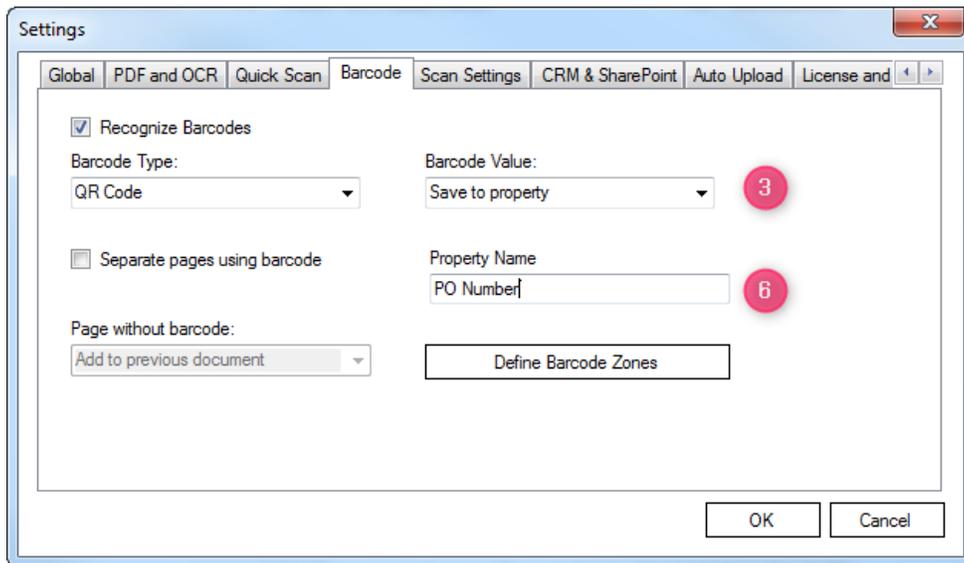
Barcode Value:

The eDocStation can save recognized barcode value to the SharePoint document property.

1. Define property for barcode value in the destination SharePoint library. For example, “Document Barcode”:



2. Open the eDocStation settings and set field “Barcode Value”(3) to “Save to SharePoint Property”. Field “SharePoint Property” (6) will be displayed.
3. Set “SharePoint Property” (6) value to the name of the previously created SharePoint property.





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4. Load page with barcode

Save options: Save selected pages only Save each page as a separate document.

2	Standard Support Program for Document Preview http://www.websio.com/support.aspx	1
		Sub-total:
		Reseller Discou
		Total:

Conditions:

1. The license is domain-based (for unlimited number of SharePo domain).
2. Trial-version activator will be sent by e-mail in two working day and approved.

5. Save document. Barcode value is saved as a SharePoint property:

Company EDIT LINKS

New documents

Home Documents Recent Pages New documents Site Contents

[+](#) new document or drag files here

All Documents

✓	Name	Modified	Document Barcode
	invoice 234 ✱	40 minutes ago	5547;7;RO18012571;8



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Barcode Zones

Barcode recognition on the entire page surface is a time-consuming process. The best way to reduce barcode recognition time is to define barcode zones.

Barcode zone is a rectangle where the eDocStation looks for the barcode. You can define as many barcode zones as you wish. Of course, reducing count of barcode zones will reduce barcode recognition time.

Important rules:

1. When barcode zones are not defined, the eDocStation looks for barcode on the entire page
2. When one or more barcode zones are defined, the eDocStation looks for barcode in the barcode zones only.

How to define barcode zones:

1. Load page containing barcode

The screenshot shows the eDocStation software interface. The top menu bar includes 'Home', 'Images', and 'Trial mode'. Below the menu are icons for 'Save', 'New Document', 'Add Page(s) Scan', 'Quick Scan&Save', 'Open File System', 'OCR English', 'Change Language OCR Settings', and 'Settings'. The 'Save options' section has checkboxes for 'Save selected pages only' and 'Save each page as a separate document'. The main window displays a document with a table and a barcode. The table has the following content:

2	Standard Support Program for Document Preview http://www.websio.com/support.aspx	1	\$
		Sub-total:	
		Reseller Discou	
		Total:	

Below the table, the text 'Conditions:' is followed by a list of two conditions:

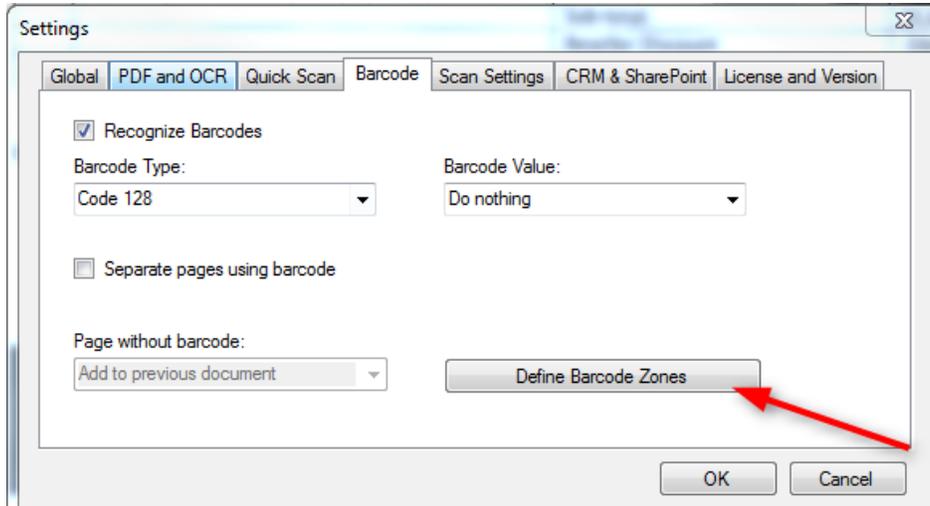
1. The license is domain-based (for unlimited number of SharePoi domain).
2. Trial-version activator will be sent by e-mail in two working day: and approved.

At the bottom, there is a barcode with the text 'value 1' underneath it.

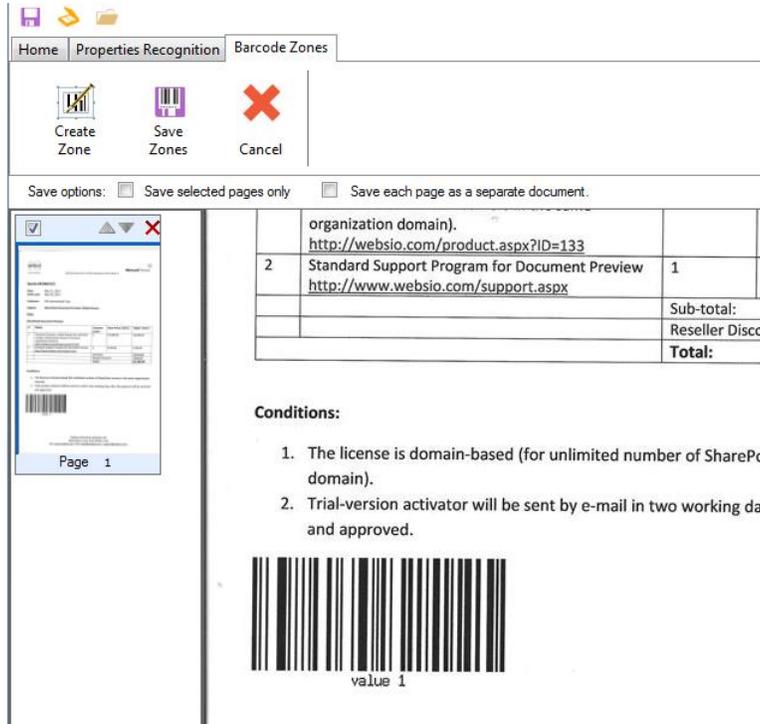


Solutions for information workers

2. Go to Settings -> Barcode and click on the "Define barcode zones"



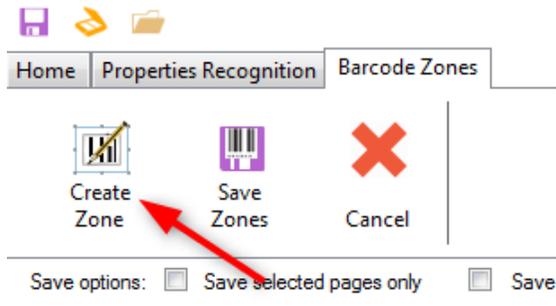
3. You'll see tab "Barcode Zones". Previously defined zones will be shown on the image surface.



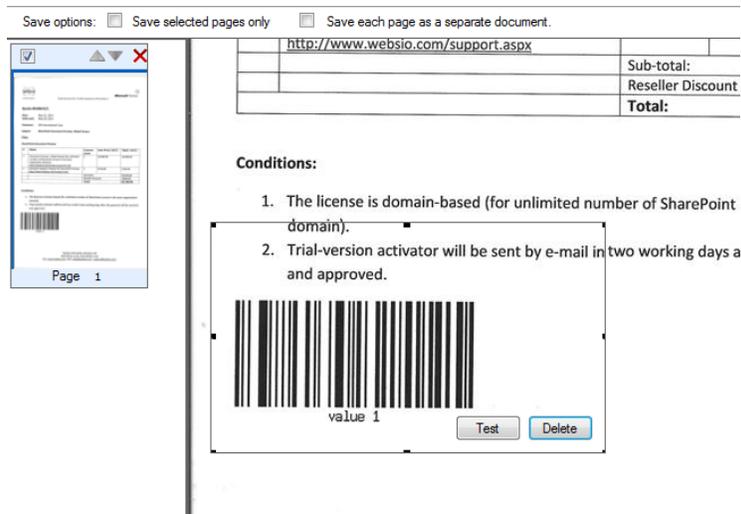
Websio Information Solutions Ltd

<http://www.websio.com> sales: sales@websio.com support: support@websio.com

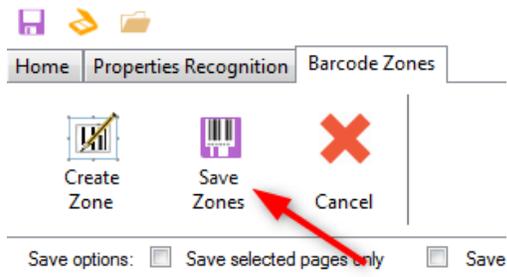
4. Create new zone:
- Click on the button "Create Zone"



- Position zone selector



- Add additional zone selectors (if required) and save zones





Auto-Upload Extension

Auto-upload extension for SharePoint Scan, PDF and OCR Add-in listens to the predefined directories and automatically uploads new or updated files to the SharePoint folders.

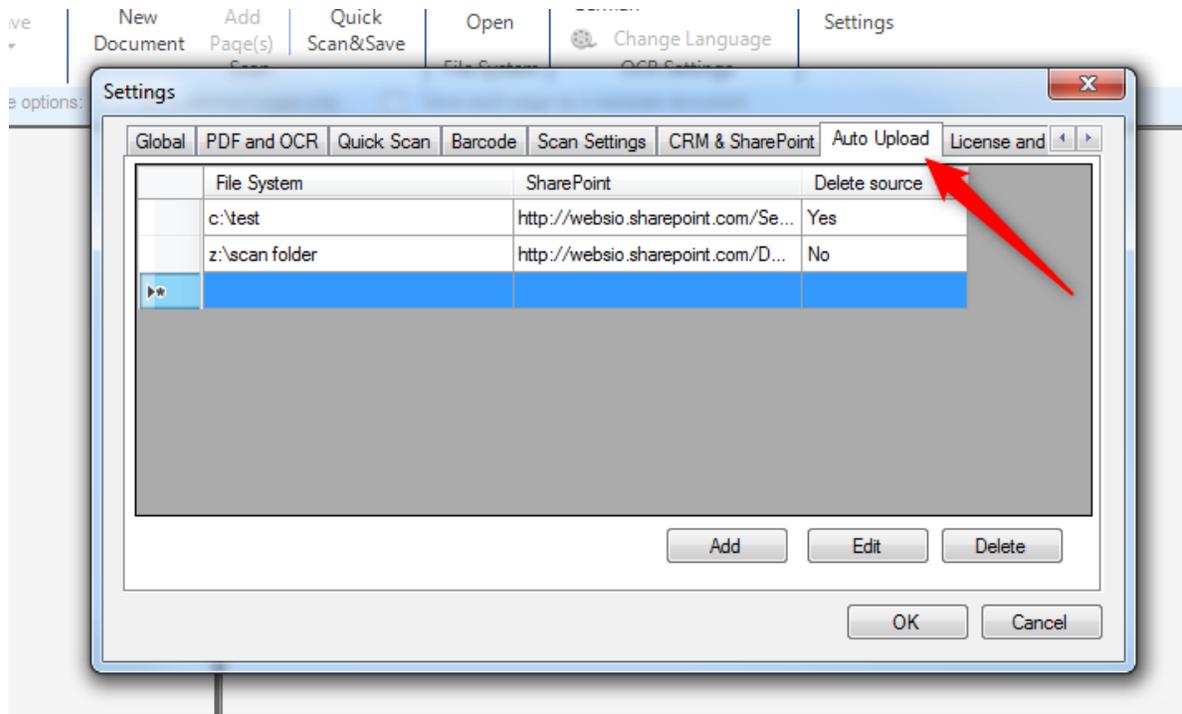
Auto-upload extension processes documents according to file type and content:

#	Source	Result
1	PDF file containing image only, non-searchable (for example, scanned document).	Searchable PDF containing text after OCR process
2	PDF file already containing text	Uploaded as-is
3	Image files (tif, jpg, png)	Searchable PDF containing text after OCR process
4	Any other file type	Uploaded as-is

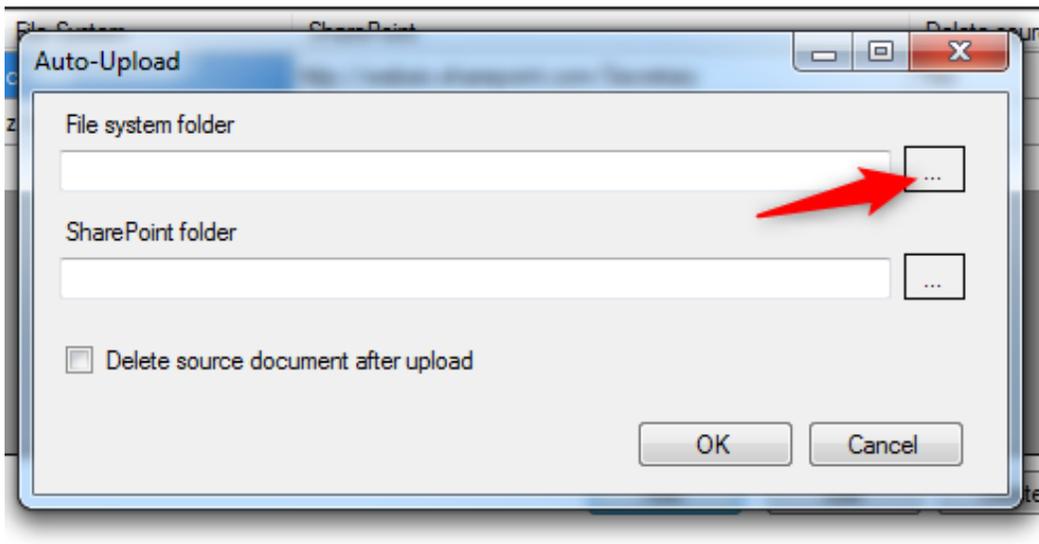
Important!

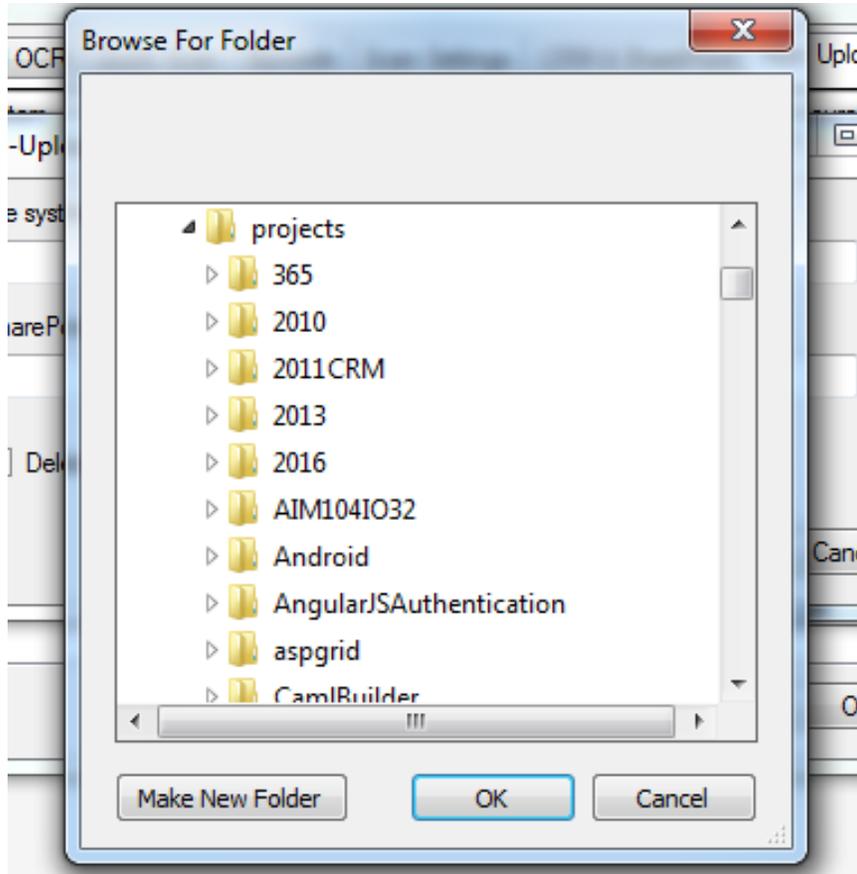
The extension is not covered by SharePoint Scan, PDF and OCR Add-in license and requires special license. Write to sales@websio.com for price proposal.

1. Open the eDocStation, go to Settings->Auto-Upload

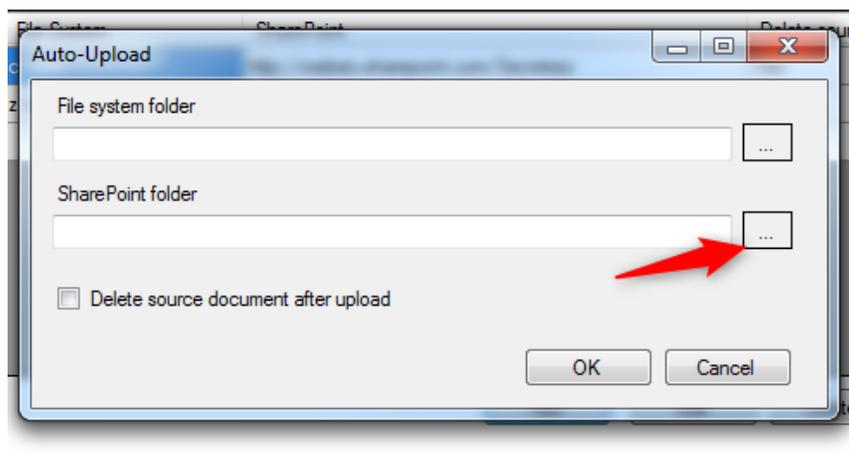


2. Click on the "Add" to define new pair "File System Folder → SharePoint Folder"
3. Select source directory



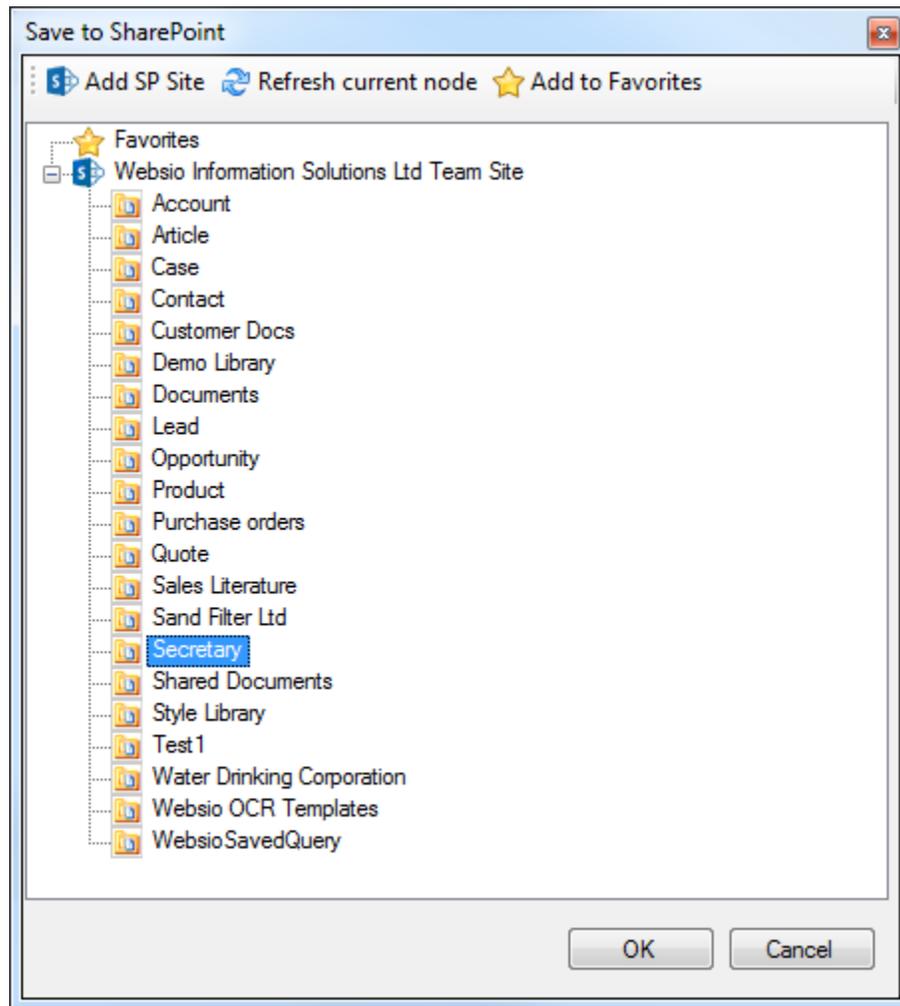


4. Select corresponding SharePoint folder

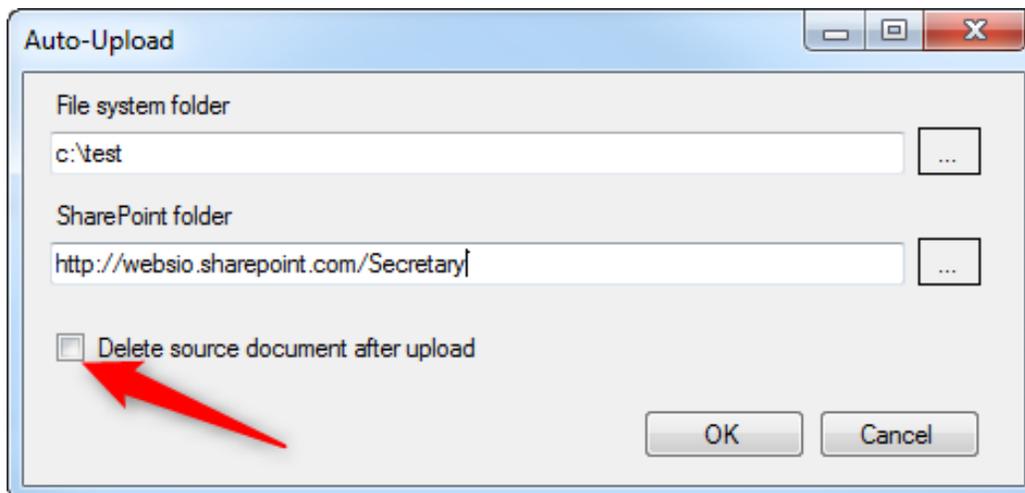




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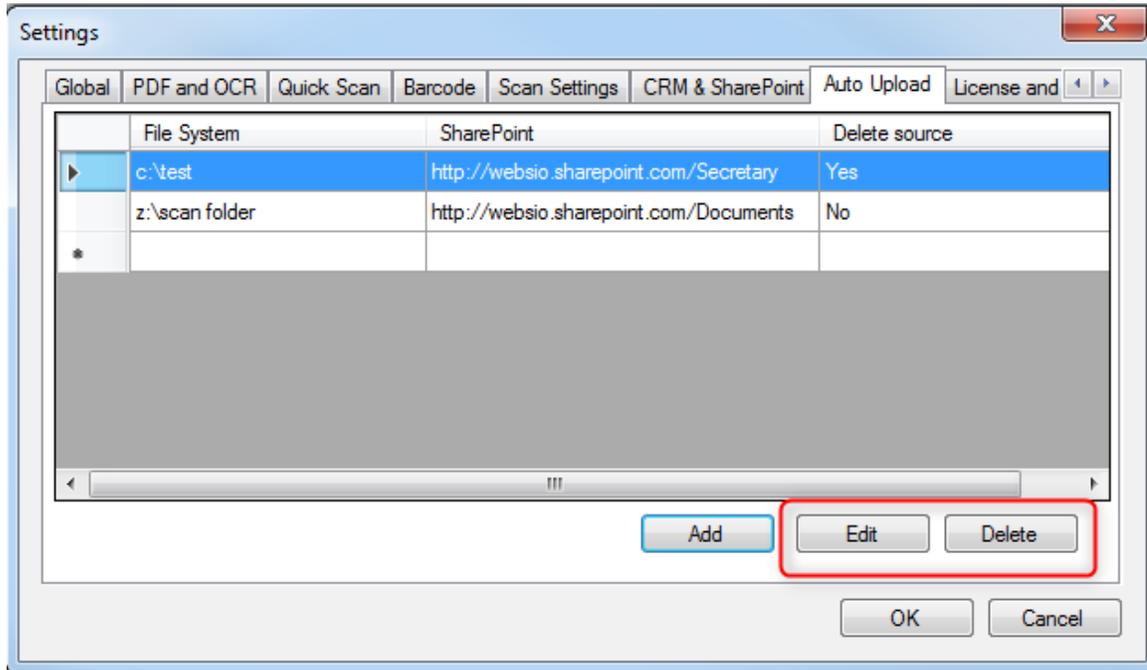
5. Decide if you want to delete source document after upload





Solutions for information workers

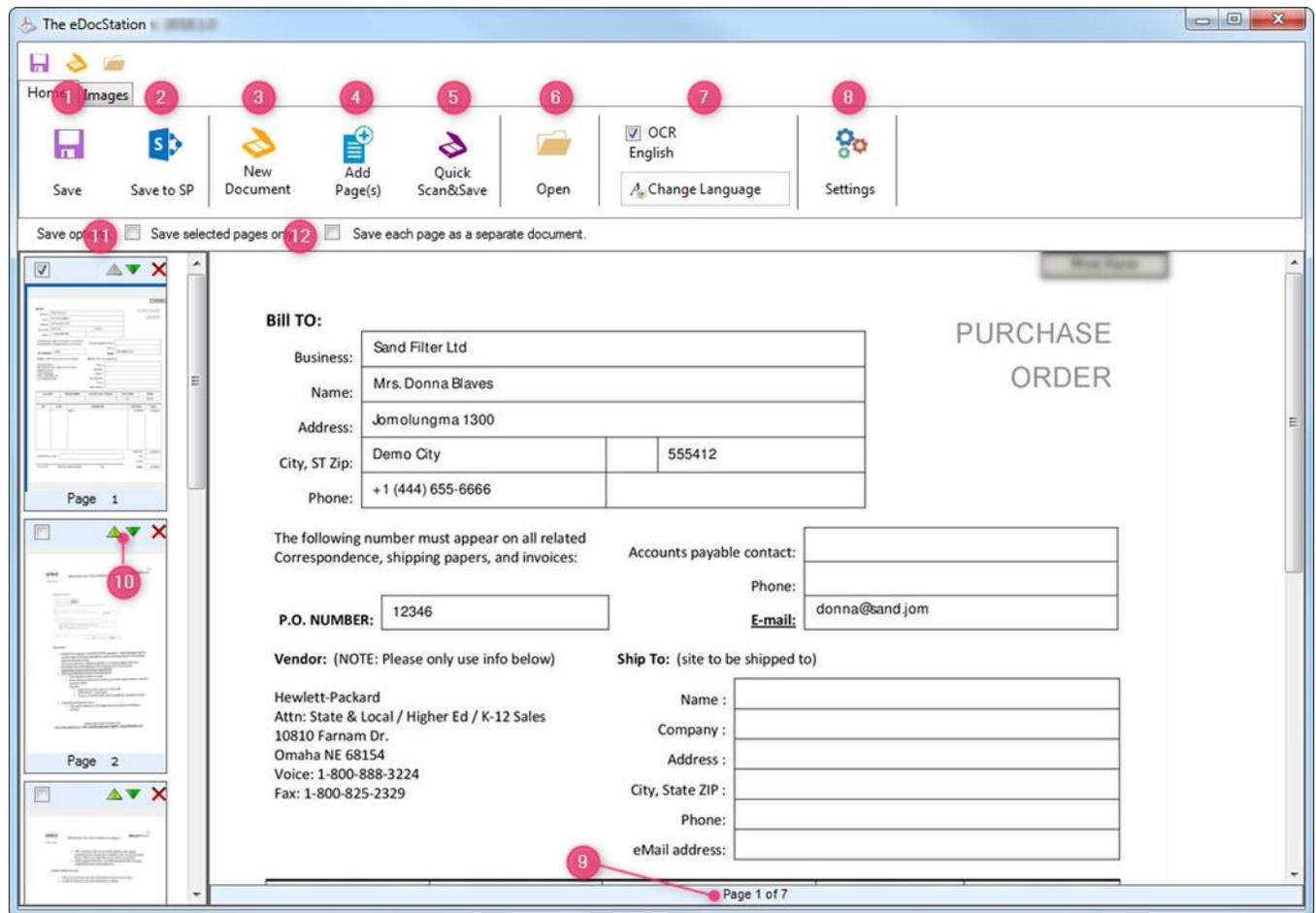
6. Press "OK"
7. New pair appears in the grid. Use buttons "Edit" or "Delete" to edit or delete previously defined pairs.



8. Close the eDocStation. Documents will be uploaded by background service "eDocClient".
9. Copy document(s) into the previously selected file system folder, it will be automatically processed and uploaded.

User Interface

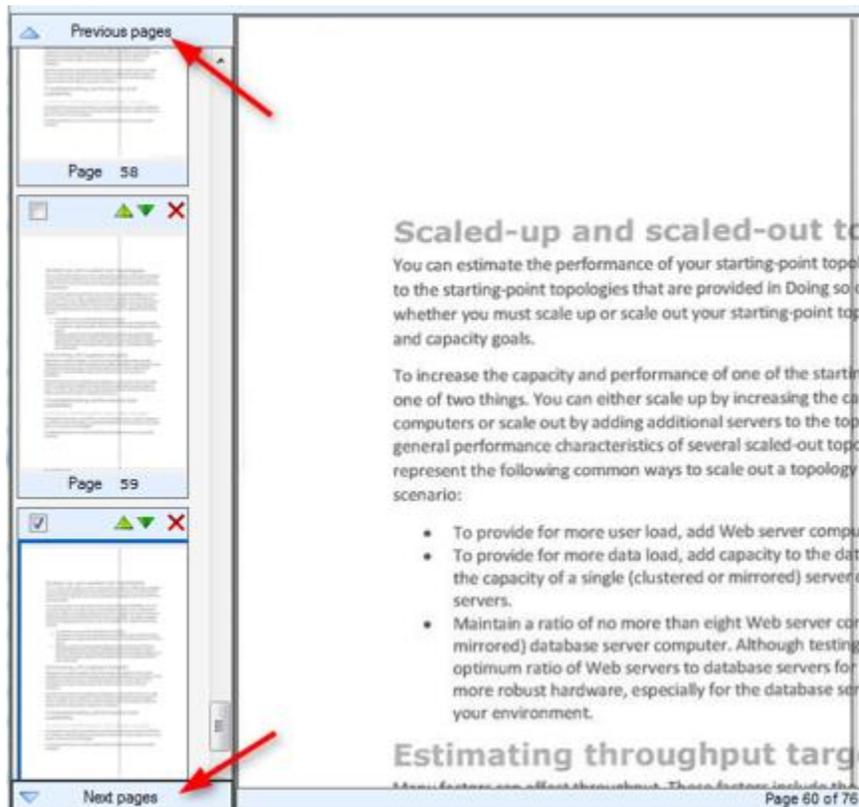
Tab "Home". Main View.



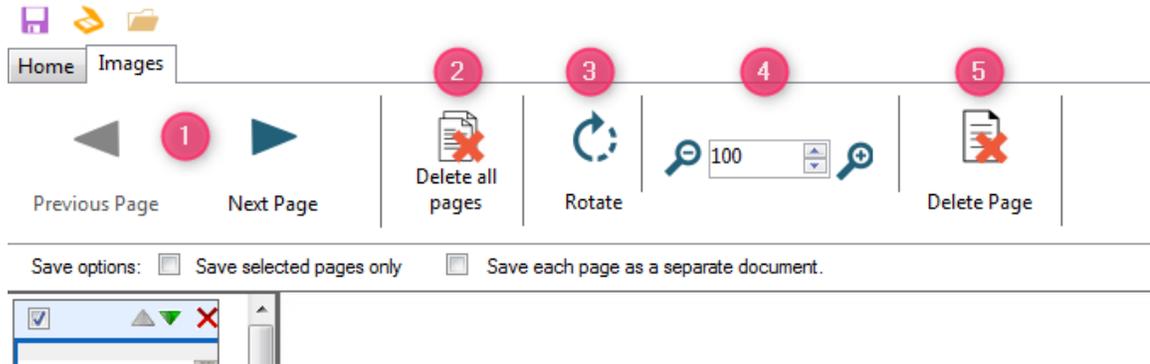
1. Save.
2. Save to SharePoint (visible in the standalone mode only)
3. Scan new document
4. Add Page(s). Scan pages and add them to the current document
5. Quick Scan & Save. Read section "[Quick Scan](#)" for details
6. Open. Load files from file system.
7. OCR. Select OCR checkbox to use text recognition process.
8. Settings.

9. Current page number and total pages count
10. Reorder pages.
11. Save selected pages only.
12. Save each page as a separate document.

Thumbnails zone displays up 30 thumbnails. When pages count exceeds 30 pages, buttons “Previous pages” and “Next pages” appear.

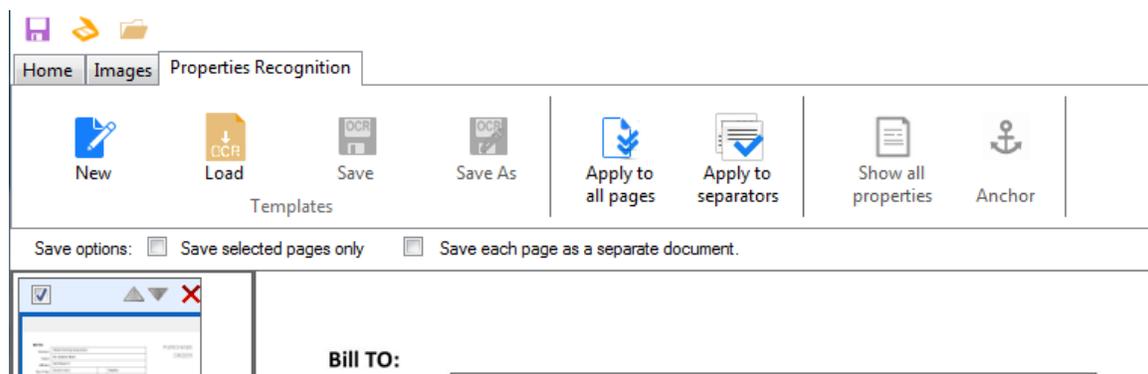


Tab “Images”



1. Navigation buttons
2. Clear. Delete all pages.
3. Rotate image.
4. Zoom
5. Delete current page

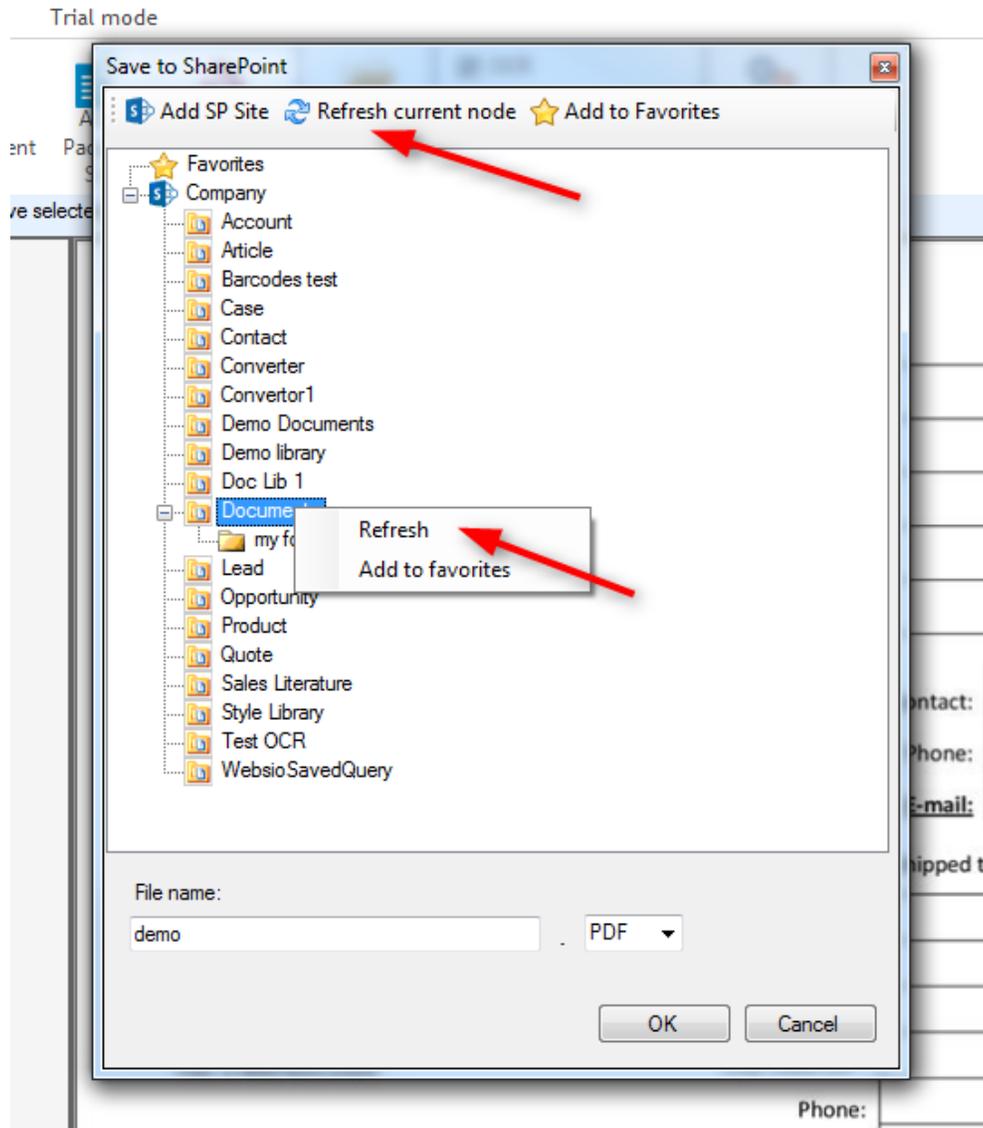
Tab “Properties Recognition”



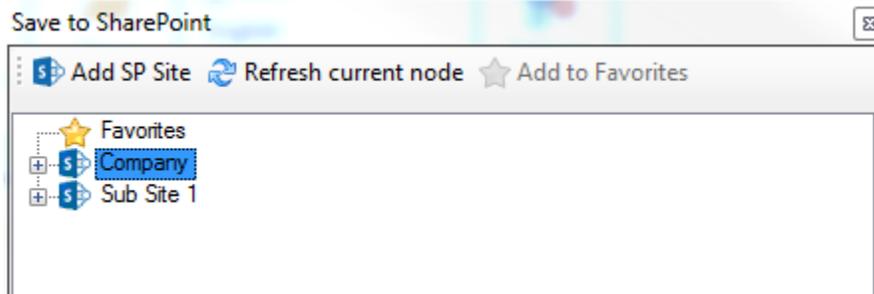
Read section “[Properties Recognition](#)” for details.

“Save to SharePoint” dialog

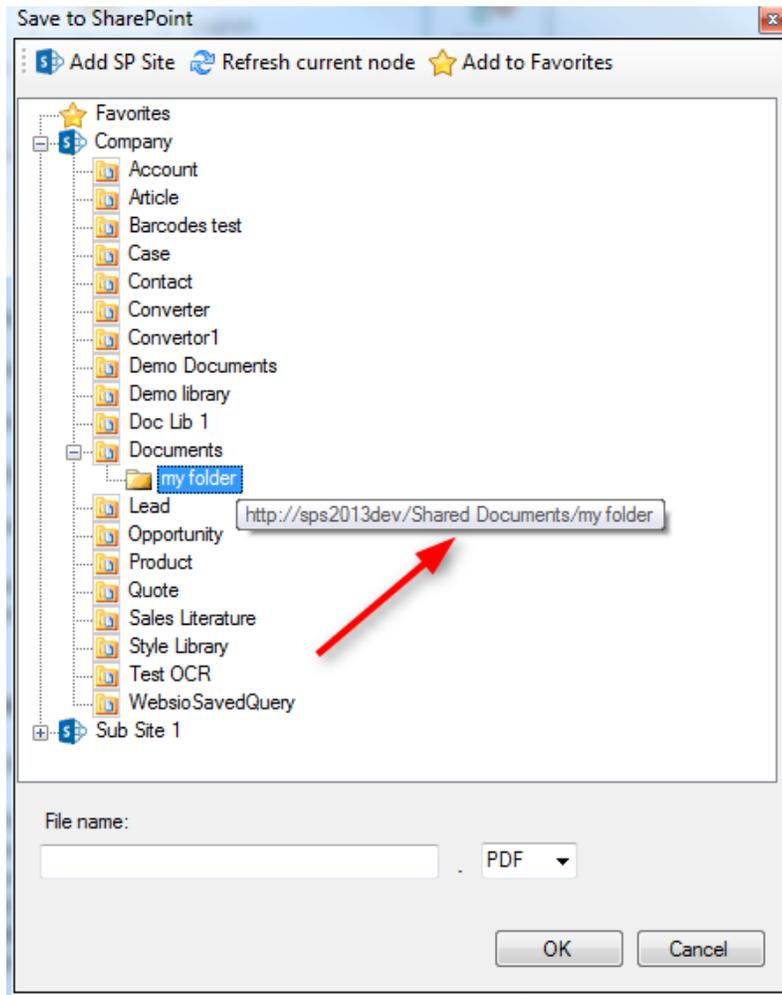
1. The dialog stores site structure in the cache. If you added/removed SharePoint libraries or folder after they were cached, use option “Refresh” to load them from SharePoint



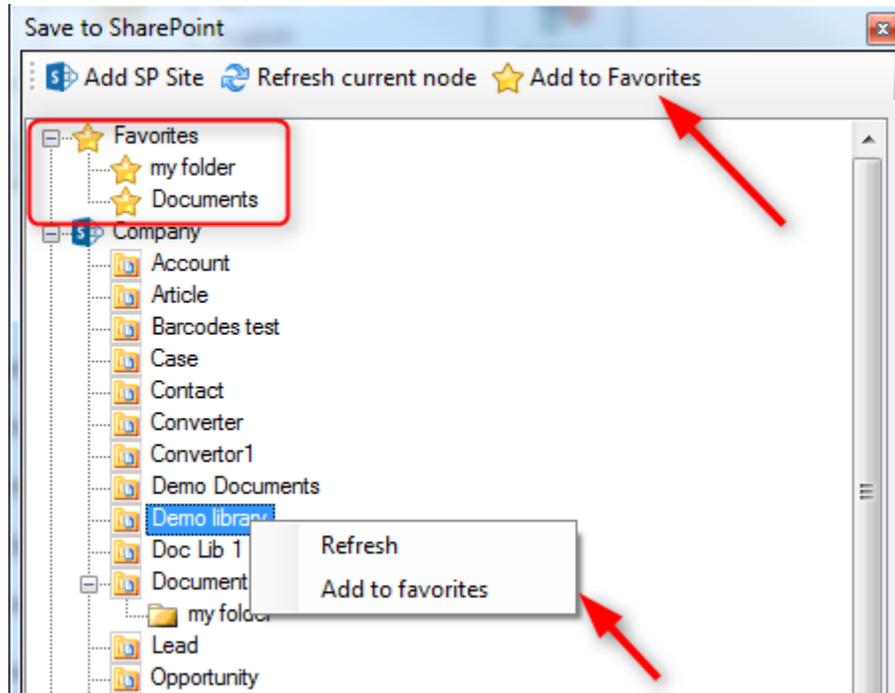
2. Site tree does not contains sub-sites. Use button “Add SP Site” to add URL of each sub-site separately. For example, sites <http://spscompany> and <http://spscompany/subsite1> :



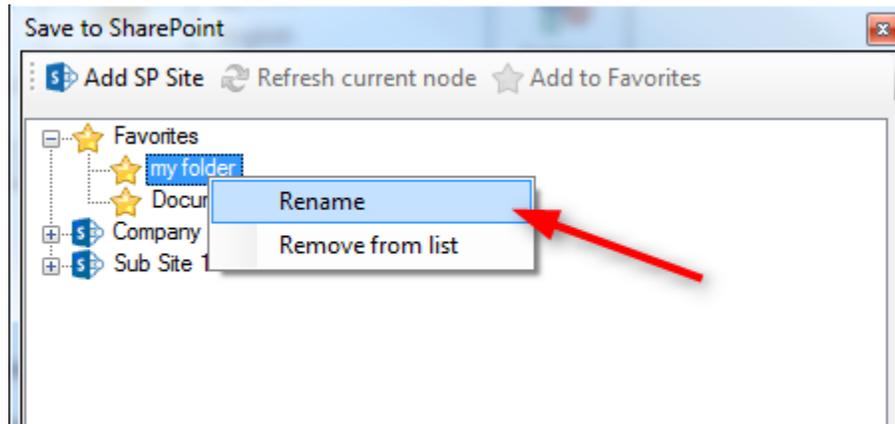
3. Tooltip of each node displays URL of the current site/library/folder.



4. Add frequently used libraries/folders to Favorites

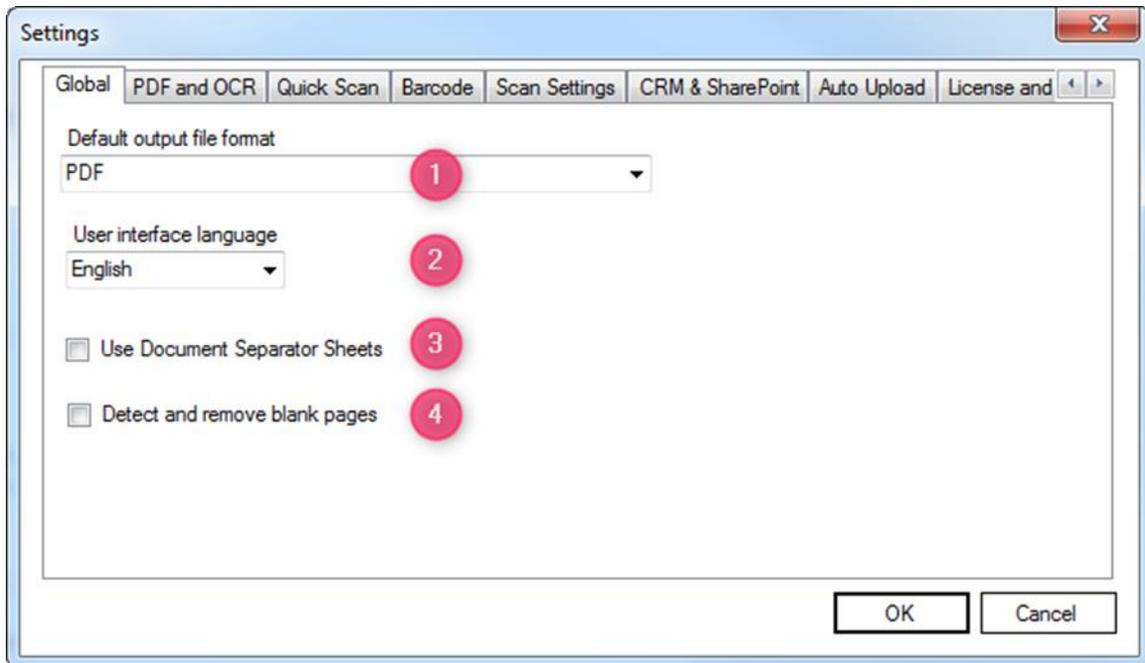


5. Use menu option "Rename" to provide to Favorite item more meaningful value.



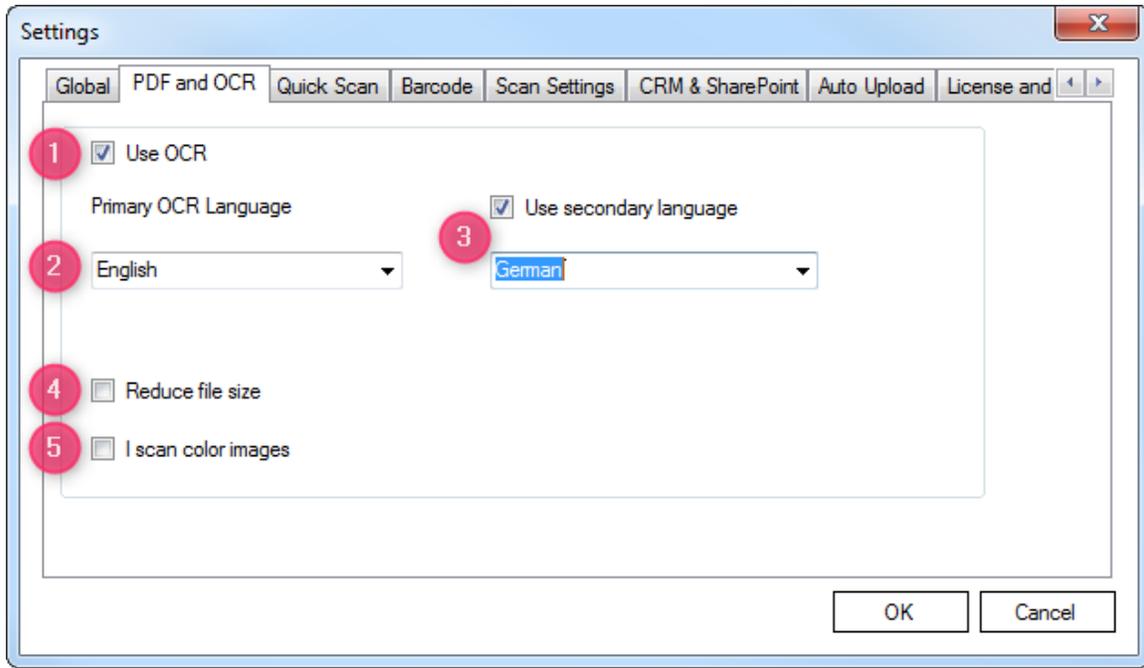
Settings

Global



1. Default output file format. The following formats are supported: PDF, TIFF, JPG, GIF, PNG or BMP
2. User interface language. English, German, Czech, Russian, Arabic and Hebrew languages are available.
3. Use Document Separator Sheets.  See section "[Document Separator Sheets](#)" above.
4. Detect and remove blank pages

PDF and OCR



1. Use OCR – enable/disable OCR.
- 2-3 OCR languages.

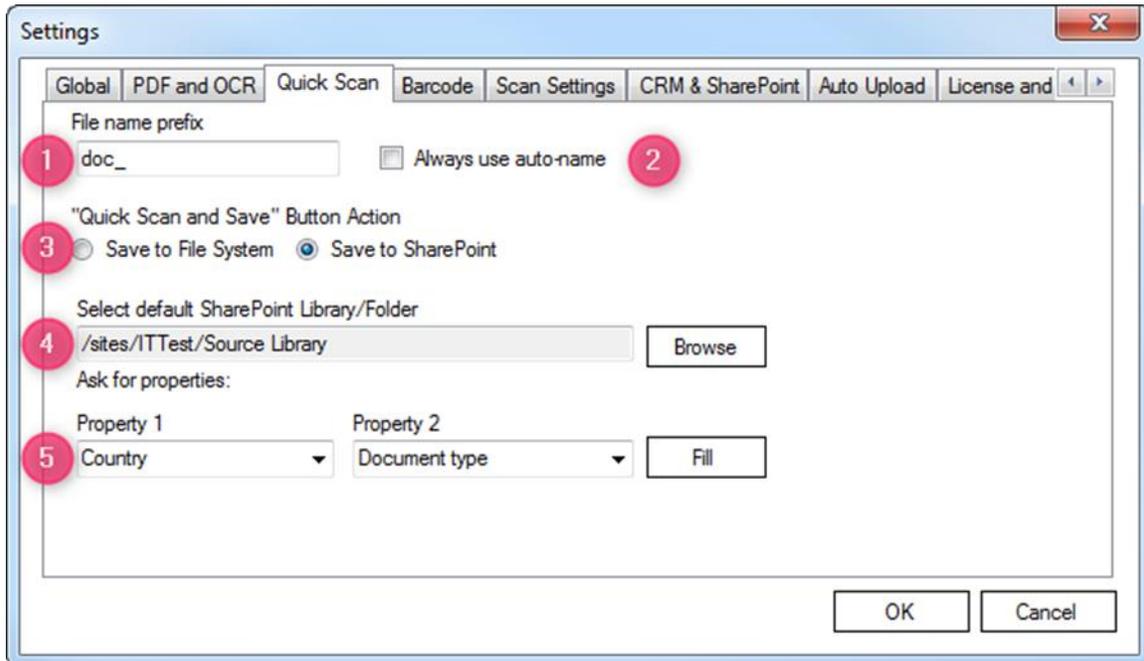
Important! Use secondary language when it is necessary (your documents have bi-lingual content). Best OCR results may be achieved by using single language.

Please pay attention: SharePoint Scan, PDF and OCR Add-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR

language packs from our site: <http://websio.com/ocrlangpacks.aspx>

4. Select this option to reduce size of the created PDF files for 30%-50%
5. Select “I scan color images” to OCR color input files

Quick Scan



The screenshot shows the 'Settings' dialog box for the 'Quick Scan' feature. The dialog has several tabs: Global, PDF and OCR, Quick Scan (selected), Barcode, Scan Settings, CRM & SharePoint, Auto Upload, and License and... The 'Quick Scan' tab is active, showing the following settings:

- 1. File name prefix: (Callout 1)
- 2. Always use auto-name (Callout 2)
- 3. "Quick Scan and Save" Button Action: Save to File System, Save to SharePoint (Callout 3)
- 4. Select default SharePoint Library/Folder: (Callout 4) with a "Browse" button.
- 5. Ask for properties: Property 1: (Callout 5), Property 2: (Callout 5) with a "Fill" button.

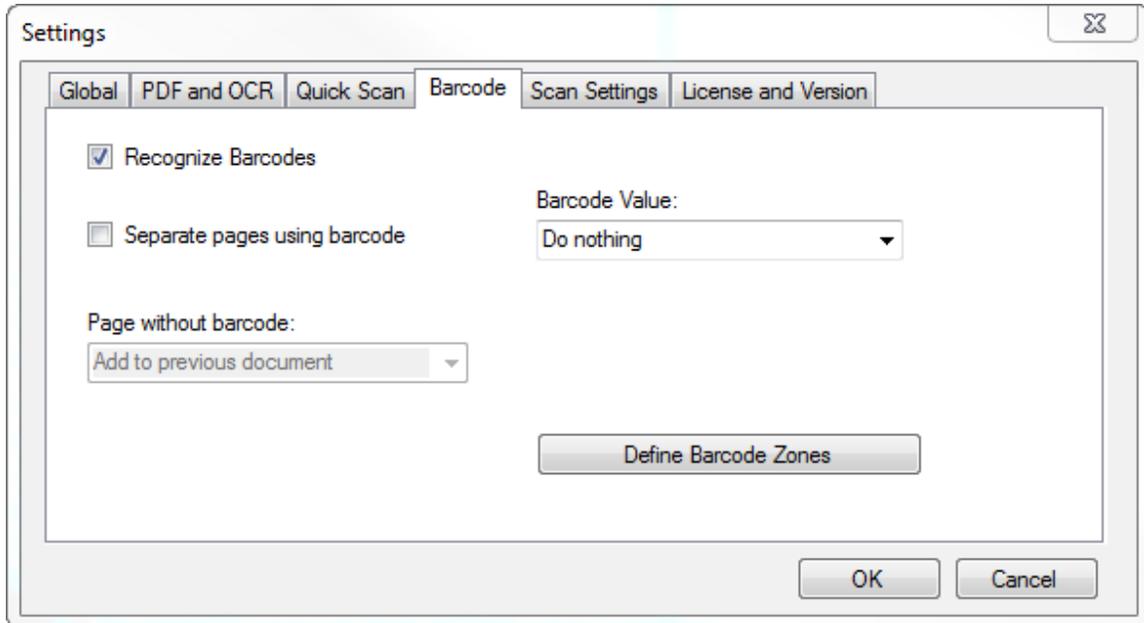
At the bottom right of the dialog are "OK" and "Cancel" buttons.

1. Prefix for auto-generated file name.
2. Always use auto-name. Select this option to use automatic name in the regular save mode too.
3. Save to file system or to SharePoint by default
4. Destination folder for Quick Scan.
5. Properties to fill during Quick Save to SharePoint. Please pay attention, we recommend to use standard SharePoint interface to fill properties instead of this option.



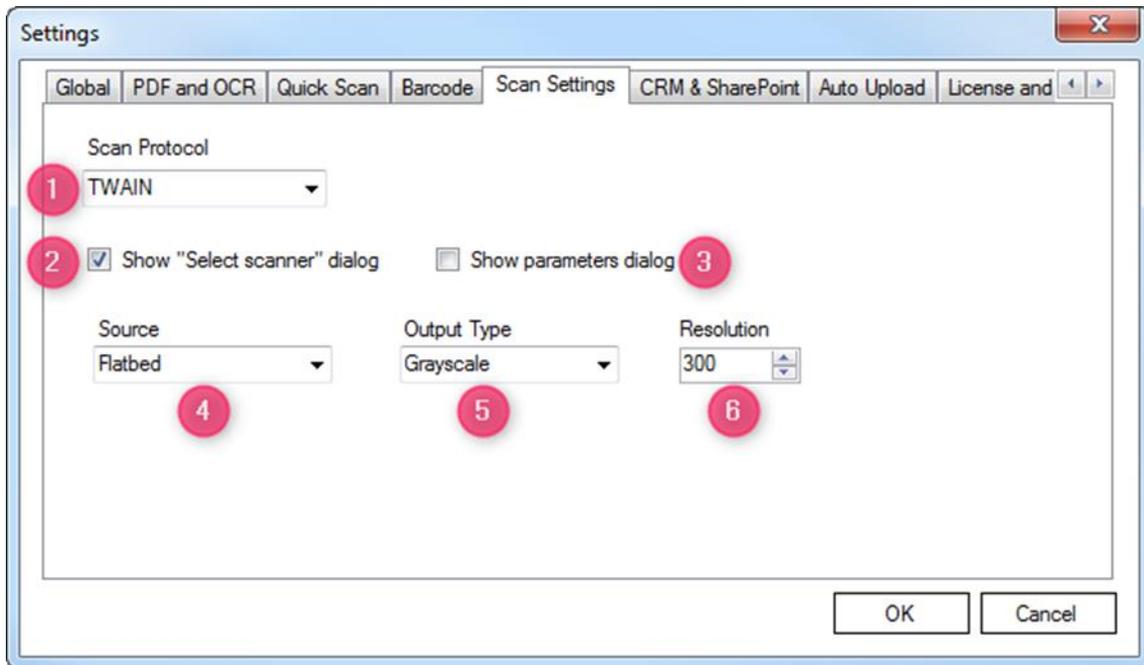
Solutions for information workers

Barcode



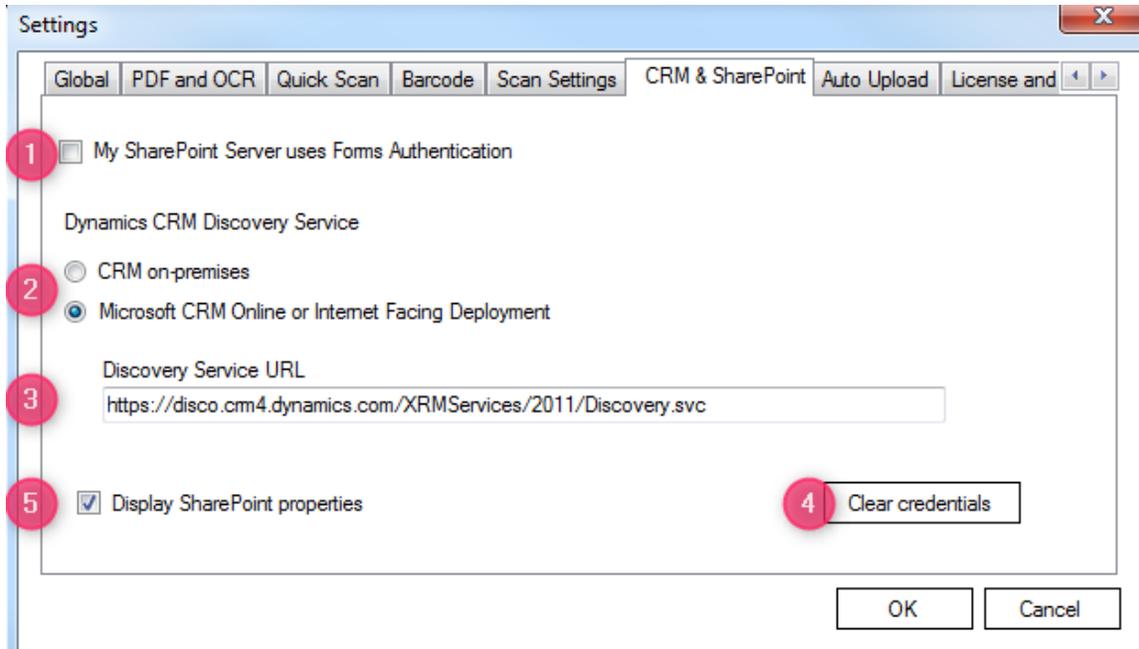
See section "[Barcodes](#)" above

Scan Settings



1. Scan protocol. TWAIN or WIA. Default value: WIA.
2. Show "Select Scanner" dialog. Select source scanner before scanning.
3. Show parameters dialog before scan
4. Source. Scan from flatbed glass or feeder.
5. Output type. Color, Grayscale or Black & White
6. Image resolution

CRM & SharePoint

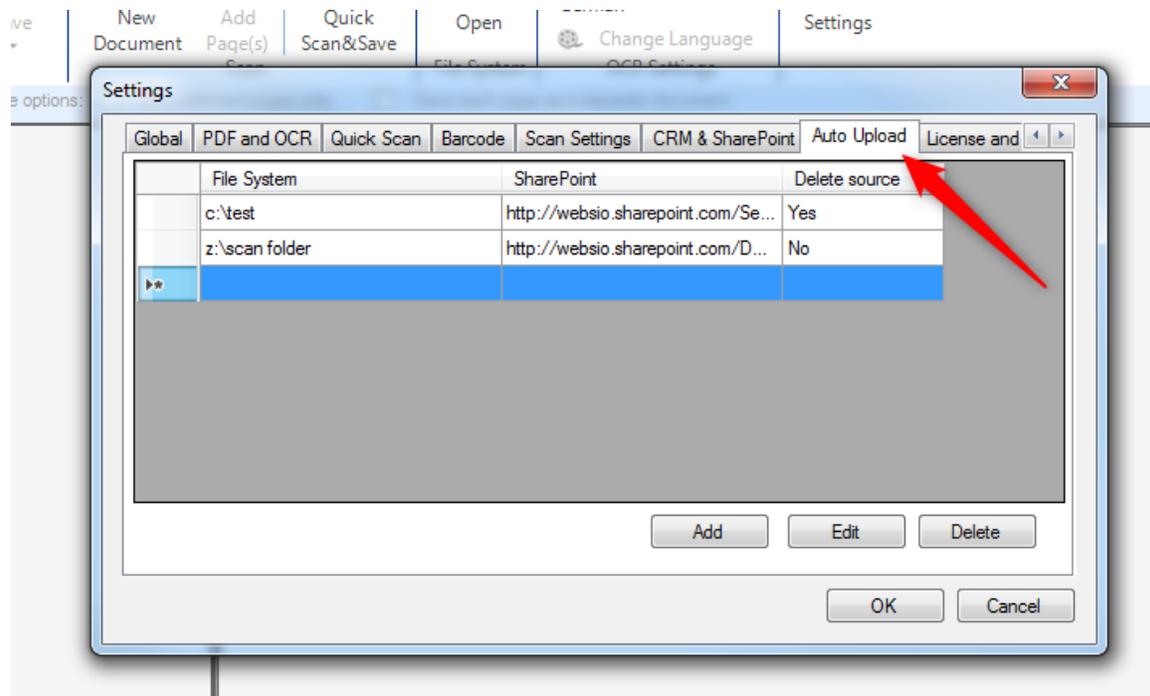


1. If your SharePoint server uses Forms Authentication, select “My SharePoint uses Forms Authentication”. If you are not sure which authentication model is in use on your SharePoint, leave this checkbox unchecked.
2. Not relevant for SharePoint
3. Not relevant for SharePoint
4. Clear previously saved user credentials
5. Open SharePoint Document Properties window after upload. This parameter is relevant for the eDocStation launched as a [standalone application](#)



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Auto-Upload



See section "[Auto-Upload Extension](#)" for details.



Troubleshooting

Error message "Problem with installation package" appears during client-part installation process



Solution:

Right-click on the "setup.exe" and select "Run as Administrator" in order to begin the installation process.



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After click on the "Scan Document" button nothing happens

Test your scanner. Scan from the Windows Paint (Important! Scan from Paint, not from the program supplied with your scanner). If you cannot scan from Paint, read your scanner documentation how to configure your scanner properly.

After click on the "Scan Document" the eDocStation freezes or error is displayed.

Probably your scanner does not support selected scan protocol. Open the eDocStation settings and change scan protocol in the "Scan settings".

After scan on the Windows 8 / 10 GDI+ error is displayed.

1. Close all instances of the Internet Explorer. Launch Internet Explorer once as Administrator (right-click on the IE icon and select "Run as Administrator").
2. Open SharePoint portal, scan document and save it.
3. Next time you can launch IE in the common mode.

Another problem

Ask for our support! Write to: support@websio.com



Solutions for information workers

This Software uses:

1. *iTextSharp library v.4.1.6 (<http://sourceforge.net/projects/itextsharp/>) distributed under Lesser General Public License (LGPL) to convert images to PDF*
2. *Tesseract OCR engine library (<http://code.google.com/p/tesseract-ocr/>) distributed under Apache License 2.0 for Optical Character Recognition (OCR)*
3. *AForge.NET Framework published under LGPL v3 license.*