



Solutions for information workers



Documents, Scan and OCR Plug-in for Dynamics CRM

Administrator and User Guide

Version: 4.2.x



Contents

<i>Overview</i>	3
<i>Requirements</i>	7
Server Requirements	7
Client Software Requirements	7
Scanner Requirements	7
<i>Installation</i>	8
CRM installation	8
Client-side installation	10
<i>How to use</i>	11
“Create eNote” or “Create eDocument”	14
Document Separator Sheets	18
OCR – convert images to searchable PDF	20
Barcodes	23
<i>User Interface</i>	29
Main view. Tab “Home”	29
Tab “Images”	32
Tab “Properties Recognition”	33
Quick Access Toolbar	33
<i>Settings</i>	34
Global	34
PDF and OCR	35
Barcode	36
Scan Settings	37
Special Settings	38
<i>Document Library Properties</i>	40
<i>Troubleshooting</i>	41



Overview

Dynamics CRM Documents, Scan and OCR Plug-in adds extra power to the native CRM capabilities. It allows scan and/or compose from existing files searchable PDF documents and save them as attachments or as documents.

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

The Plug-in is realized as native Dynamics CRM managed solution.

The Plug-in supports:

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



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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, Polish, Portuguese, Romanian, Russian, Serbian, Slovakian, Slovenian, Spanish, Swahili, Swedish, Tagalog, Tamil, Telugu, Thai, Turkish, Ukrainian, Vietnamese



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The Plug-in allows saving created documents as:

1. eNote – Note with attachment
2. eDocument – Document in the associated SharePoint folder

The screenshot shows the Microsoft Dynamics CRM interface for the 'Adventure Works' account. The top navigation bar includes 'Sales', 'Accounts', and 'Adventure Works'. The main area displays account information such as 'Annual Revenue \$60,000.00' and a 'Summary' section. A red arrow points to the 'ASSIGN' button in the top toolbar, which has opened a dropdown menu. In this menu, the options 'Create eNote' (marked with a red circle and the number 1) and 'Create eDocument' (marked with a red circle and the number 2) are highlighted. Other options in the menu include 'Email a Link', 'Delete', 'Form', 'Add to Queue', 'Queue Item Details', 'Share', 'Share Secured Fields', 'Follow', 'Run Workflow', 'Start Dialog', 'Word Templates', and 'Run Report'.



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Client part - The eDocStation

The screenshot shows a Microsoft Dynamics CRM interface with a browser window titled "Account: Adventure Works". The main content area displays "The eDocStation v. 4.8.0" application. The application has a top menu bar with options like Home, Images, Save, New Document, Add Page(s), Quick Scan&Save, Open, OCR, English, Change Language, OCR Settings, and Settings. Below the menu bar, there are two tabs: "Page 1" and "Page 2". The "Page 1" tab is active and shows a form titled "Bill TO:". The form contains the following fields:

- Business: Sand Filter Ltd
- Name: Mrs. Donna Blaves
- Address: Jomolungma 1300
- City, ST Zip: Demo City 555412
- Phone: +1 (444) 655-6666
- P.O. NUMBER: 12346
- Accounts payable contact: (empty field)
- Phone: (empty field)
- E-mail: donna@sand.jom
- Vendor: (NOTE: Please only use info below) Hewlett-Packard, Attn: State & Local / Higher Ed / K-12 Sales, 10810 Farnam Dr.
- Ship To: (site to be shipped to) Name: (empty field), Company: (empty field)

The form is displayed within a browser window titled "Account: Adventure Works". The browser window also shows a sidebar with a "Summary" section and a "Status" section. The "Status" section shows "Active".

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Requirements

Server Requirements

- Microsoft Dynamics CRM Online or on-premises

Client Software Requirements

- Windows 7 / Windows 8.x / Windows 10
- Microsoft Internet Explorer 9.0 or greater. Microsoft Edge, Chrome or Firefox
- Microsoft .NET Framework 4 or greater

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.

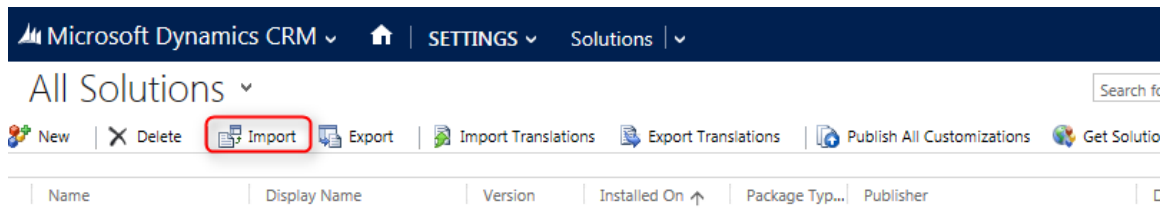
To test that your scanner is correctly defined, try to scan from one of the standard Microsoft programs like Paint or Microsoft Clip Organizer



Installation

CRM installation

1. Open Dynamics CRM. You must belong to CRM security role "System Administrator".
2. Go to "Settings" -> "Solutions" and click on the "Import"

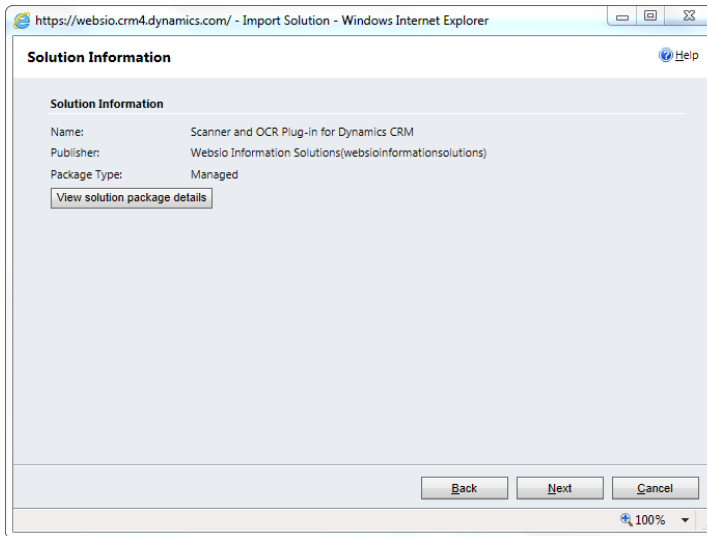


3. In File Open dialog, select managed solution file
"WebsioCRMScannerOCRPlugin_x_y_z_managed.zip" from the directory "server" of the installation set.

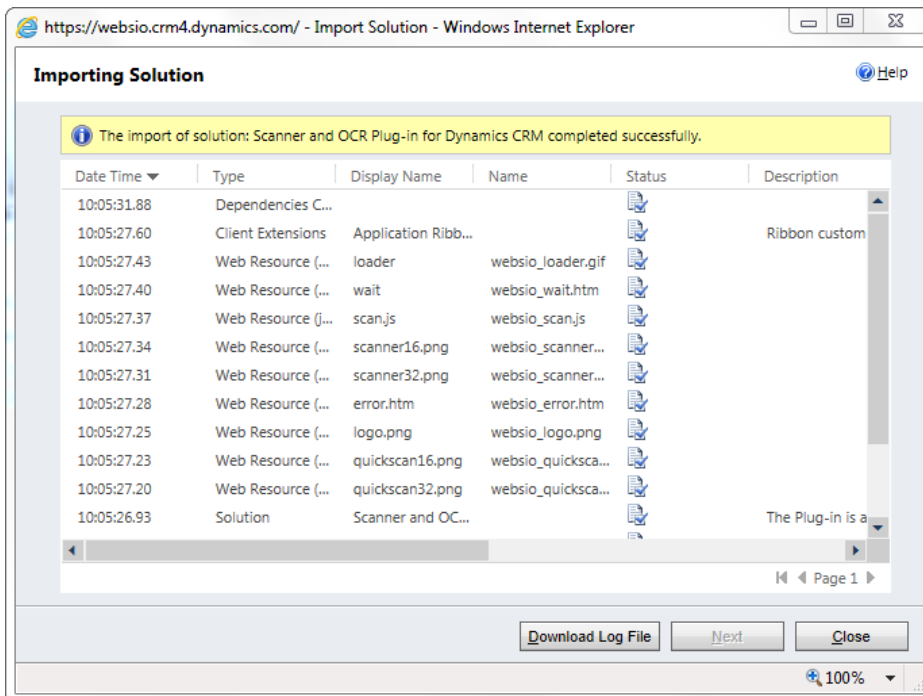


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4. Press "Next". Solution Information screen will appear. Press "Next" again:



5. The solution will be imported. Press "Close".



Read section “Special Settings” for Dynamic 365 (CRM Online) or Internet Facing Deployment



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Client-side installation

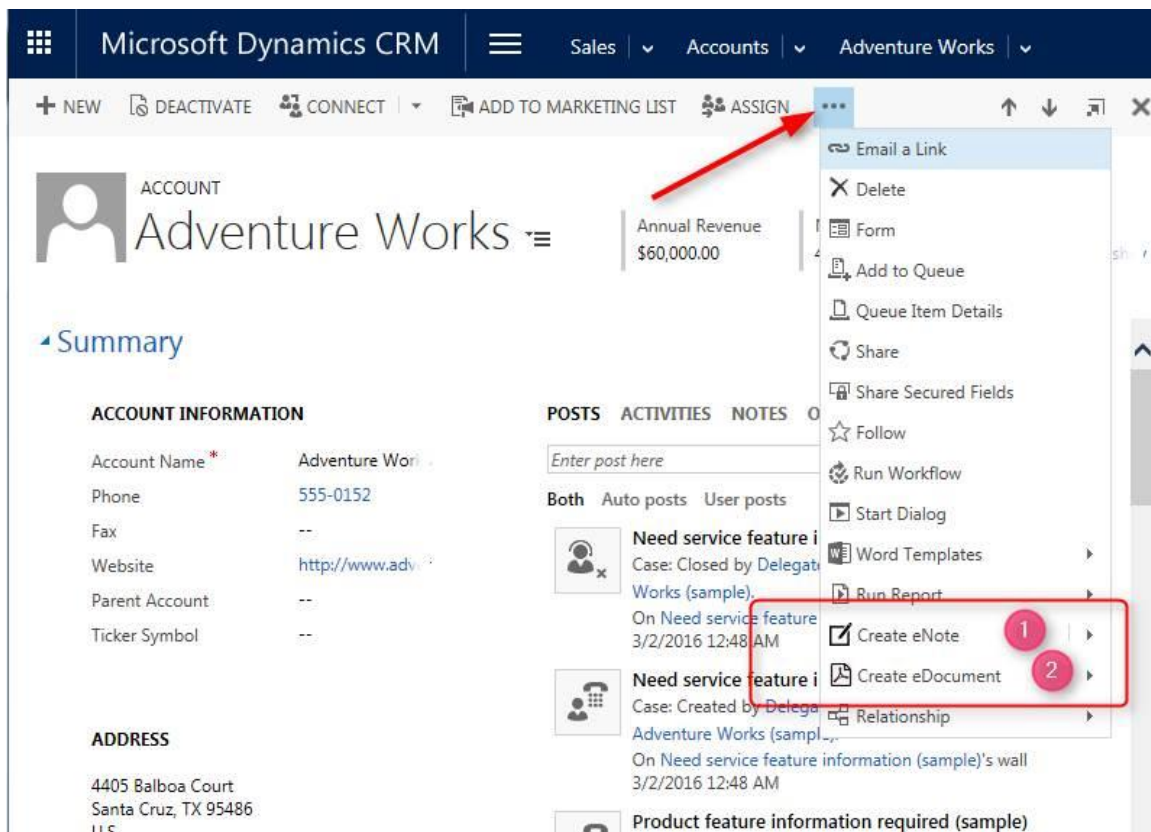
1. Unzip directory "eDocStation" from the crmplugin.zip file on your client machine
2. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the plug-in installation wizard.

Please pay attention! Scanner Plug-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/product.aspx?ID=128>

How to use

There are new options in the actions menu of each CRM entity: “Create eNote” and “Create eDocument”.



The screenshot displays the Microsoft Dynamics CRM interface for the 'Adventure Works' account. The top navigation bar includes 'Sales', 'Accounts', and 'Adventure Works'. The main content area shows the account details, including 'Annual Revenue' of \$60,000.00. The 'Summary' section is expanded, showing 'ACCOUNT INFORMATION' and 'ADDRESS'. The 'POSTS' tab is active, displaying a list of posts. A red arrow points to the '...' button in the top right corner, which opens the actions menu. The actions menu is open, showing various options. Two options, 'Create eNote' (1) and 'Create eDocument' (2), are highlighted with red circles and numbered. The 'Create eNote' option is marked with a checkmark, indicating it is selected.



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1. Option “Create eNote” saves document(s) as a note with attachment:

Microsoft Dynamics CRM | Sales | Accounts | Adventure Works

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | EMAIL A LINK | DELETE | FORM

ACCOUNT
Adventure Works

Summary

ACCOUNT INFORMATION

Account Name *	Adventure Works
Phone	555-0152
Fax	--
Website	http://www.adventure-works.com
Parent Account	--
Ticker Symbol	--

POSTS | ACTIVITIES | NOTES | ONENOTE

Enter a note

invoice_0003.pdf

2. Option “Create eDocument” saves document in the entity’s document location – associated SharePoint folder

Microsoft Dynamics CRM | Sales | Accounts | Adventure Works

ACCOUNT
Adventure Works

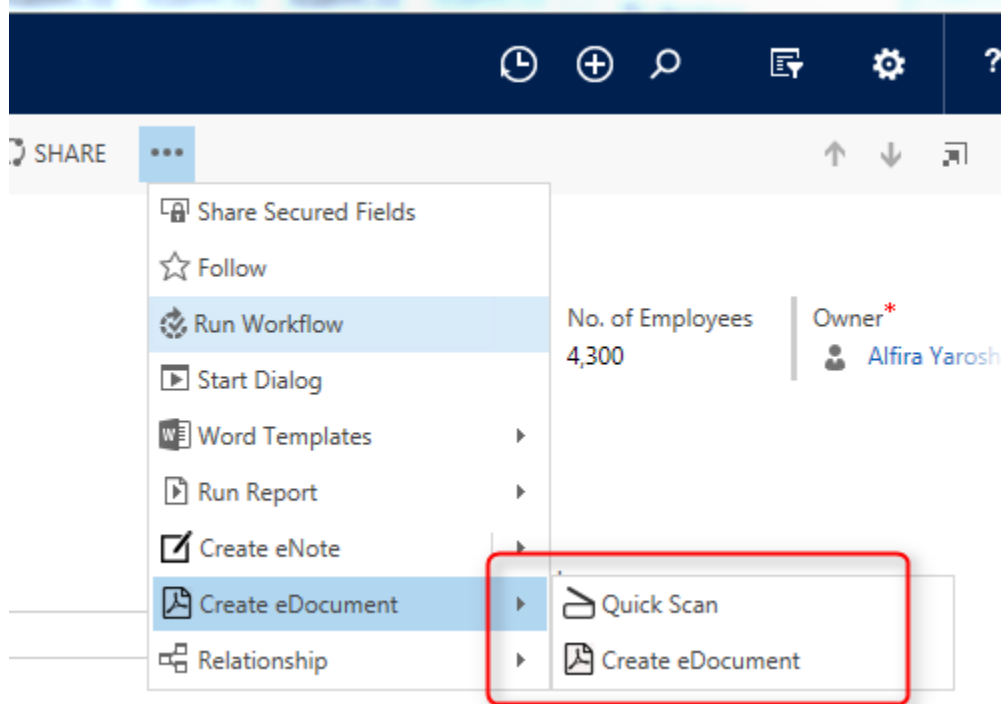
Annual Revenue
\$60,000.00

Document Associated Grid

+ NEW | UPLOAD | DOCUMENT LOCATION | ADD LOCATION | EDIT LOCATION | OPEN LOCATION

✓	Name	Modified	Modified by	Document Location
	invoice_0003.pdf	3/16/2016 10:22 PM	Office Transparency	SharePoint

Both options have sub-menu



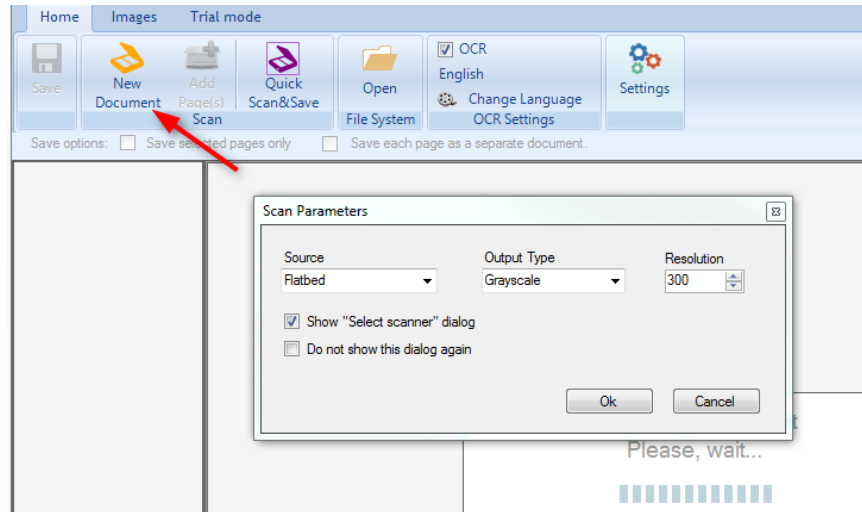
Click on the “Quick Scan” to scan document with minimal user interaction.



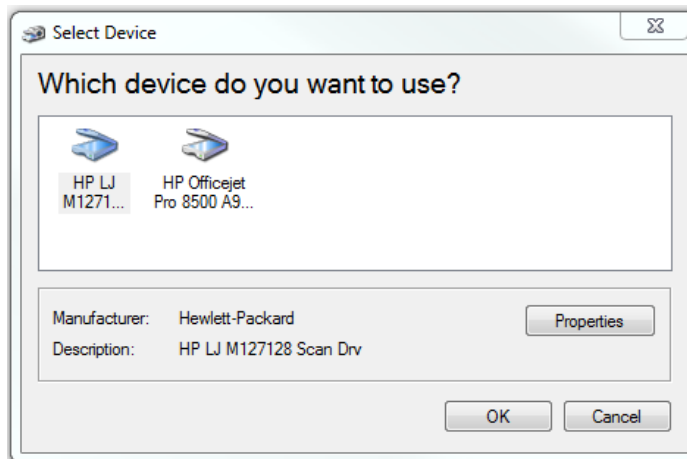
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“Create eNote” or “Create eDocument”

1. Click on the "New Document" and select scan parameters



2. Select scanner



** That step may be omitted by unchecking option "Show Select Scanner dialog" on the previous screen or in the eDocStation settings.*

3. Click "OK" and complete scan process.



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4. Scanned pages:

The screenshot shows the Websio eDocStation v. 4.0.1 - Trial Version interface. The top menu bar includes Home, Images, and Trial mode. Below the menu bar are icons for Save, New Document, Add Page(s), Open, File System, OCR (checked), English, Change Language, OCR Settings, and Settings. The Save options section shows "Save selected pages only" and "Save each page as a separate document." The main area displays a scanned document with a purchase order form. The form includes fields for Business (Water Drinking Corporation), Name (Mr. Dolphin Shark), Address (Gulf Stream 5), City, ST Zip (Atlantic Town, 882254), and Phone (+1 (100) 988-8333). It also has fields for P.O. NUMBER (89540), Vendor (Hewlett-Packard), and Ship To (site to be shipped to). The bottom of the form shows a table with columns for P.O. DATE, REQUISITIONER, Contract name / Number, F.O.B. POINT, and TERMS.

P.O. DATE	REQUISITIONER	Contract name / Number	F.O.B. POINT	TERMS
			free	30 days

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

The screenshot shows a "Save to SharePoint" dialog box. It has a "Name:" label followed by a text input field. To the right of the input field is a dropdown menu currently set to "PDF". At the bottom of the dialog are "OK" and "Cancel" buttons.

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

6. The Plug-in uploads document and completes the process.



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Additional save options:

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

The screenshot shows the Websio eDocStation v. 4.0.1 interface. The top menu bar includes 'Home', 'Images', 'Properties Recognition', and 'File System'. The 'File System' menu is open, showing options like 'Save', 'New Document', 'Add Page(s)', 'Open', 'OCR', 'English', 'Change Language', 'OCR Settings', and 'Settings'. The 'Save options' section is visible, with the checkbox 'Save selected pages only' checked. A red arrow points to this checkbox. Below the menu bar, there is a document form with fields for 'Business', 'Name', 'Address', 'City, ST Zip', 'Phone', 'P.O. NUMBER', 'Vendor', and 'Ship To'. The form is titled 'PURCHASE ORDER' and contains the following information:

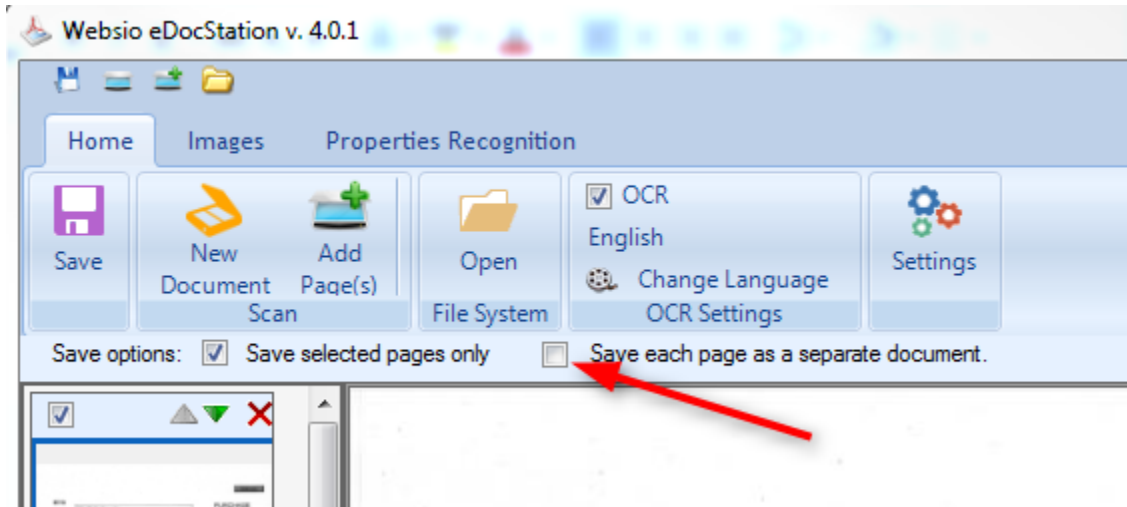
BILL TO:	
Business:	Water Drinking Corporation
Name:	Mr. Dolphin Shark
Address:	Gulf Stream 5
City, ST Zip:	Atlantic Town 882254
Phone:	+1 (100) 988-8333
The following number must appear on all related Correspondence, shipping papers, and invoices:	
P.O. NUMBER:	89540
Accounts payable contact:	
Phone:	dolphin@gulfstream.atl
E-mail:	
Vendor: (NOTE: Please only use info below)	
Ship To: (site to be shipped to)	
Hewlett-Packard	Name:
Attn: State & Local / Higher Ed / K-12 Sales	Company:
10810 Farnam Dr.	Address:
Omaha NE 68154	City, State ZIP:
Voice: 1-800-888-3224	Phone:
Fax: 1-800-825-2329	

Page 1 of 3



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2. You can save each page as a separate document:



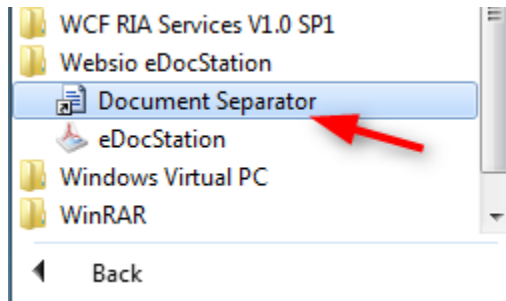


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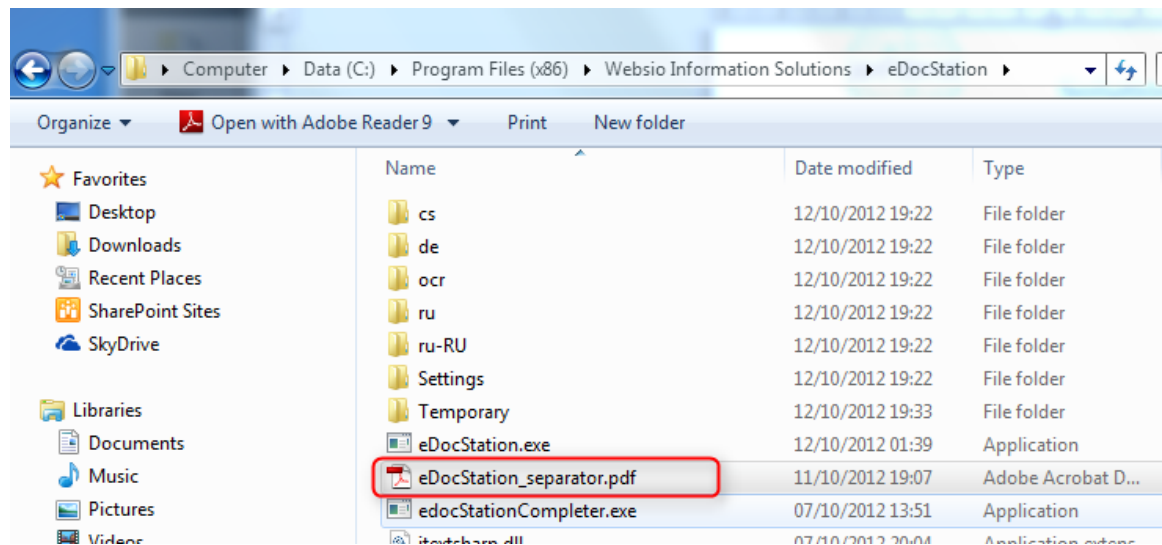
Document Separator Sheets

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

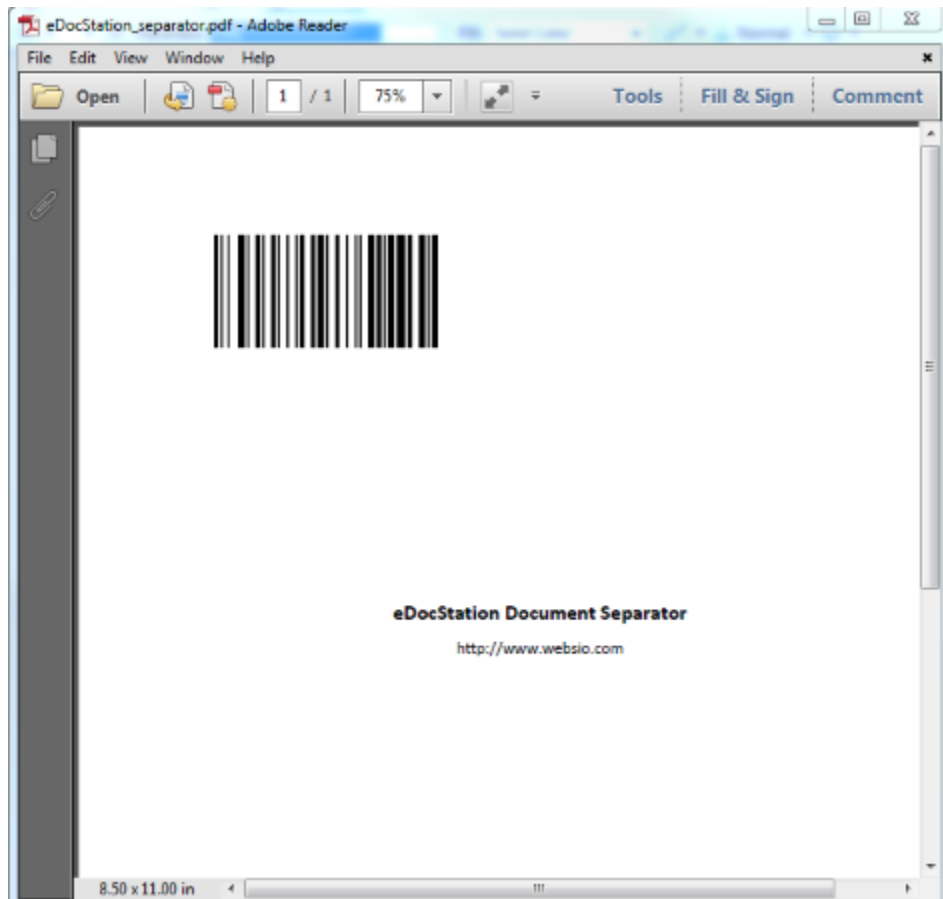


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- b. Print Separator Sheet in A4 format in a high quality.
- 3. Separate documents in the scanner feeder by previously printed sheets
- 4. Scan documents using the Plug-in. Quick Scan mode is recommended but not required.

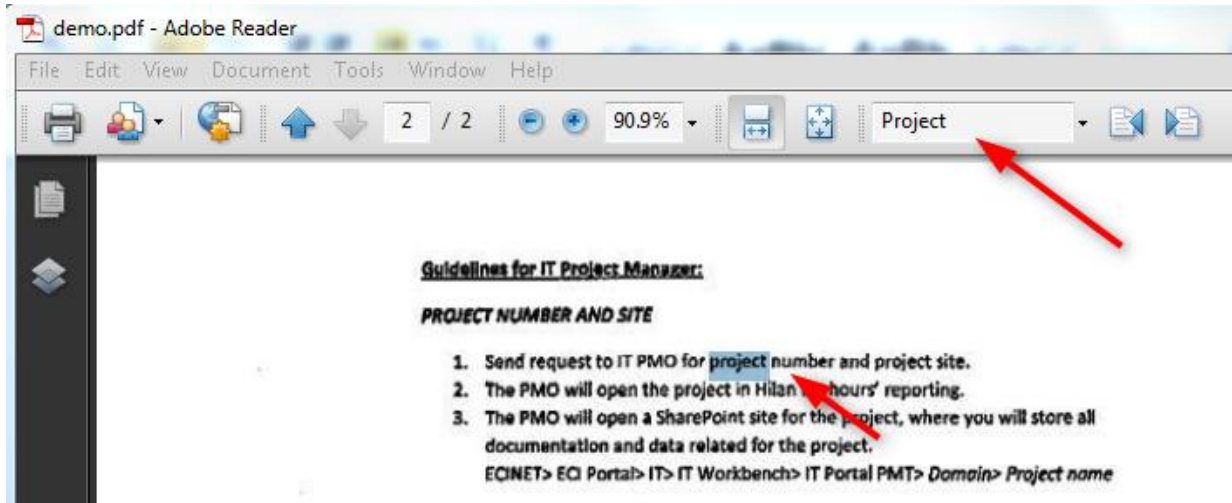


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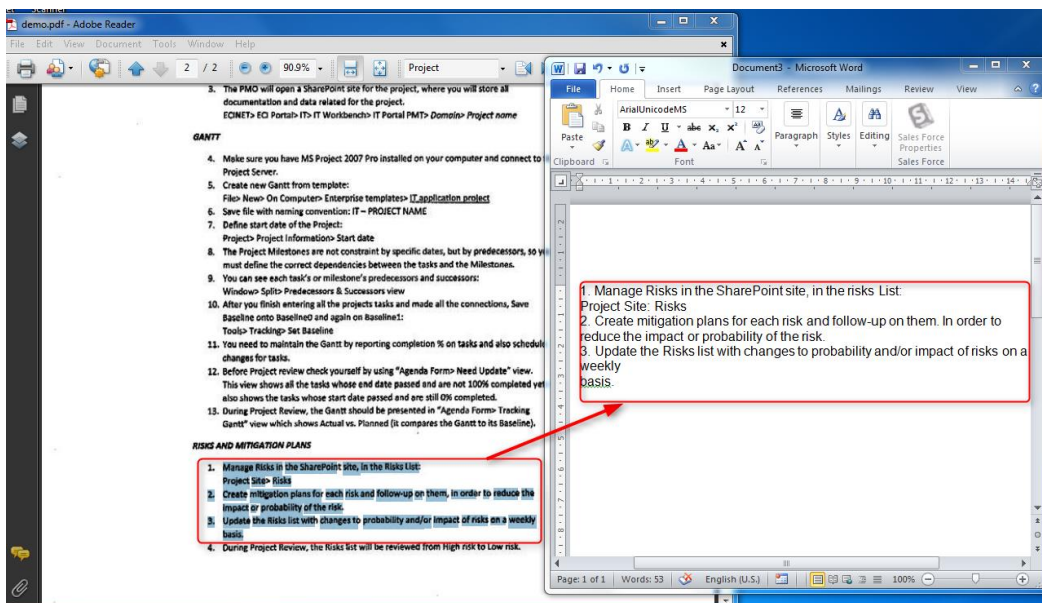
OCR – convert images to searchable PDF

Searchable PDF (document created using OCR process) advantages:

- Search documents by content using standard SharePoint search engines
- Search text in the document:



- Copy text from the document:

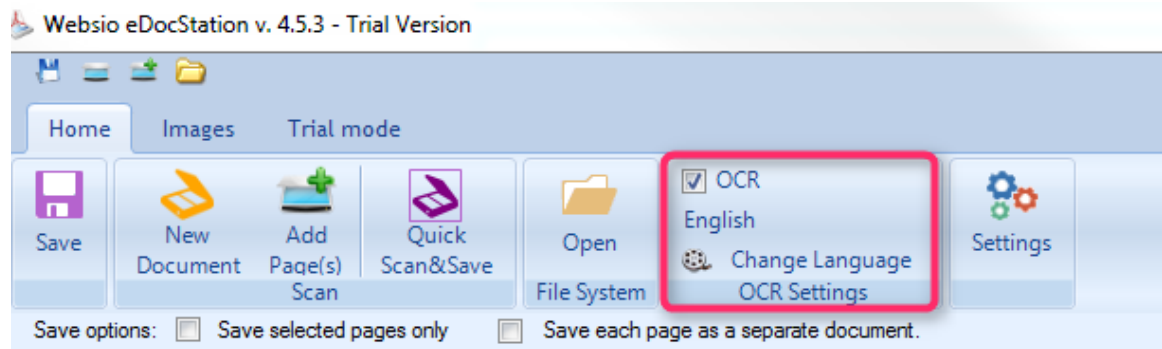


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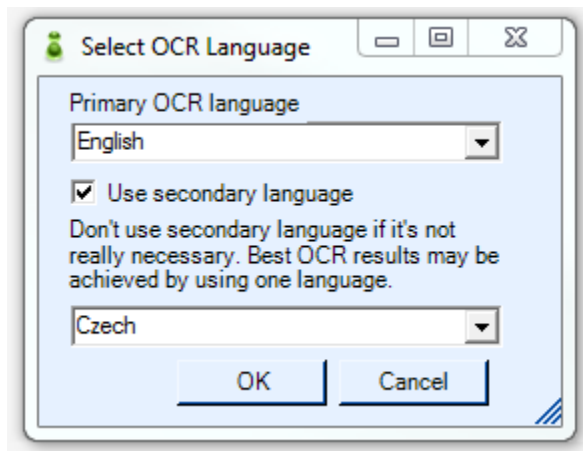
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The best OCR (text recognition) quality can be reached for images scanned in grayscale with 300 dpi resolution.

1. Select checkbox "OCR" and document languages to create searchable document.



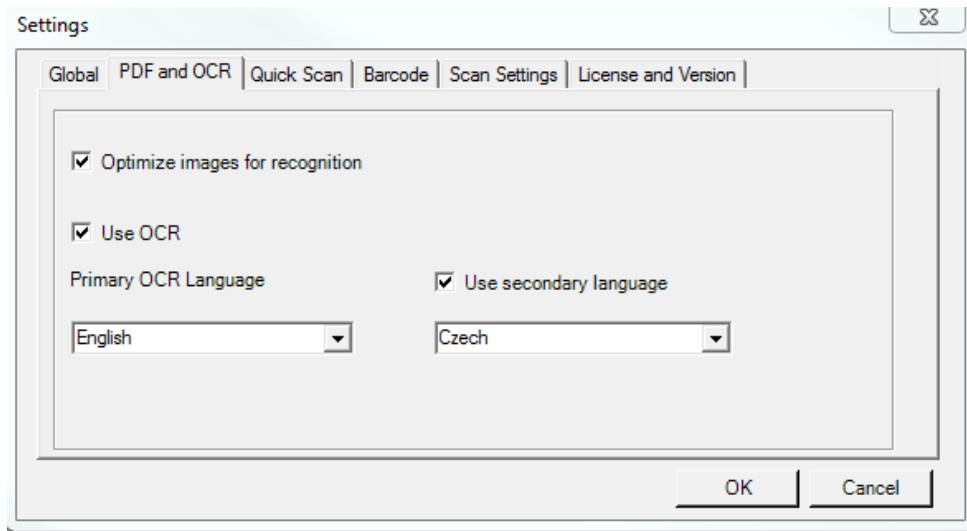
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.



2. Set default OCR parameters using eDocStation settings:



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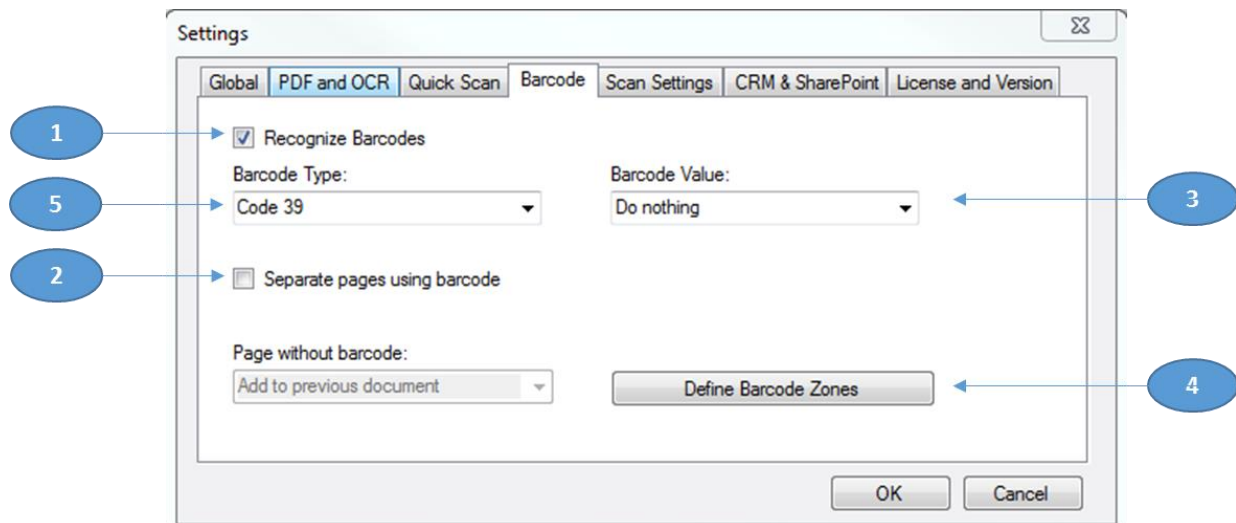


Important! Scanner and OCR Plug-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site:
<http://www.websio.com/product.aspx?ID=128>

3. OCR process runs during document save process. The process may take some time, depending on the pages count and original images quality.
4. OCR is available for all scan modes: Regular Scan, Quick Scan and Document per page mode.

Barcodes

Define barcode recognition settings using Barcode tab of the Settings window.



Turn barcode recognition on

Select checkbox “Recognize barcodes” (1)

Select barcode type (5).

Supported types: Codabar, Code 11, Code 128, Code 25, Code 39, Code39 Extended, Code 93, Code 93 Extended, Data Matrix, Deutsche Post Identcode, Deutsche Post Leitcode, EAN 128, EAN 13, EAN 14, EAN 8, Interleaved 25, ITF 14, ITF 6, MSI, OPC, PDF 417, PDF 417 Macro, Planet PostNet, PZN, QR Code, Royal Mail 4-State, RSS 14, RSS 14 Truncated, RSS Expanded, RSSLimited, SCC14, Singapore Post 4-State, SSCC 18, Swiss Post Parcel, UPCA, UPCE, USPS.

Default value: Code 128.

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 (2) to activate this option.



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You can select behavior for pages without barcodes using option “Page without barcode” (4):

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

Barcode Value

This feature is available for SharePoint only. See User Guide for SharePoint Scanner Plug-in.

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.



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How to define barcode zones:

1. Load page containing barcode

Webzio eDocStation v. 4.0.1 - Trial Version

Home Images Trial mode

Save New Document Add Page(s) Open OCR English Change Language OCR Settings Settings

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

Page 1

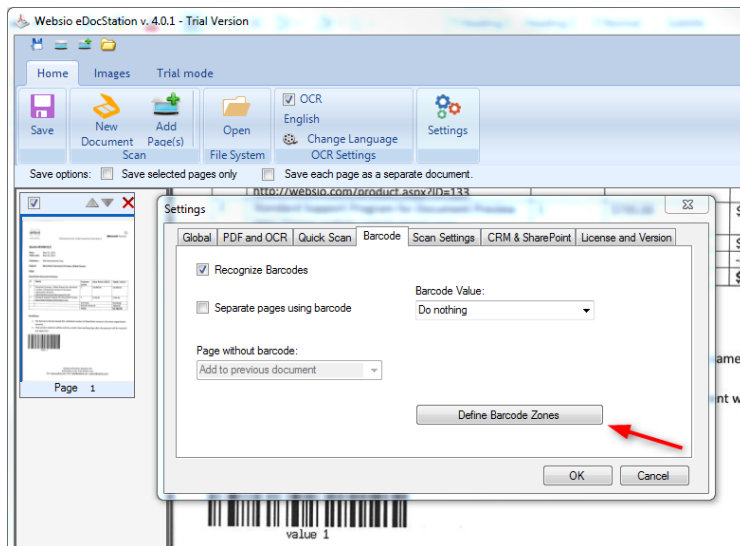
2	http://websio.com/product.aspx?ID=133	1	\$735.00
			Sub-total:
			Reseller Discount
			Total:

Conditions:

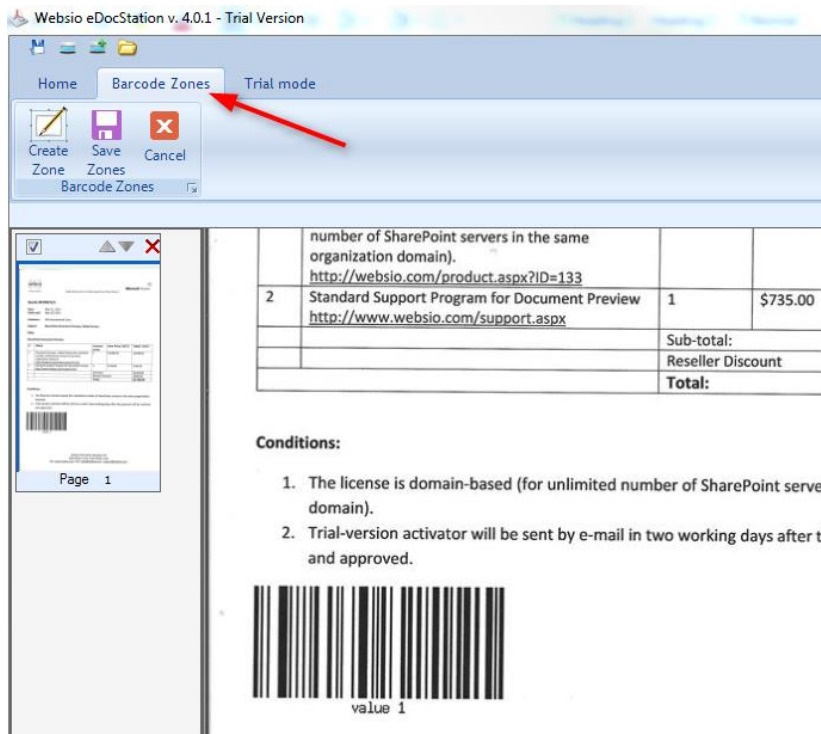
1. The license is domain-based (for unlimited number of SharePoint servers in domain).
2. Trial-version activator will be sent by e-mail in two working days after the purchase and approved.

value 1

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



3. New tab "Zones" will be displayed. Existing zones will be shown on the image surface.



4. Create new zone:

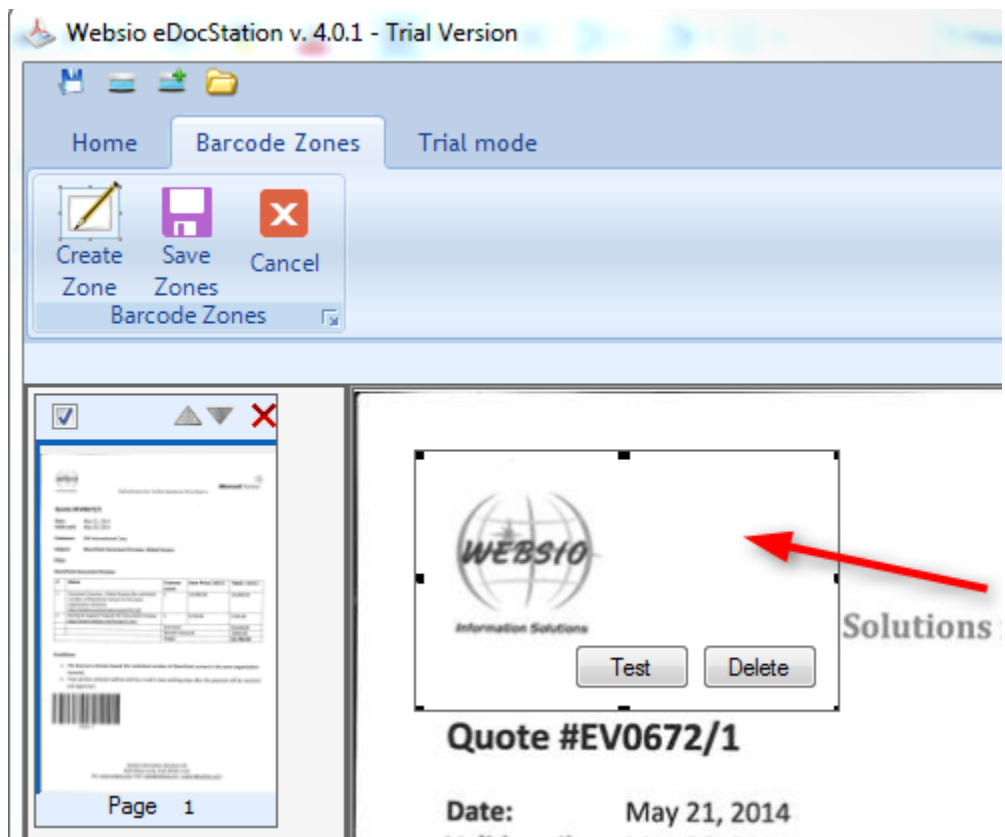


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- Click on the button "Create Zone"



- Zone selector will be added to the top-left corner of the image surface





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- Drag zone selector to the barcode and resize it as required.

Webzio eDocStation v. 4.0.1 - Trial Version

Home Barcode Zones Trial mode

Create Zone Save Zones Cancel Barcode Zones

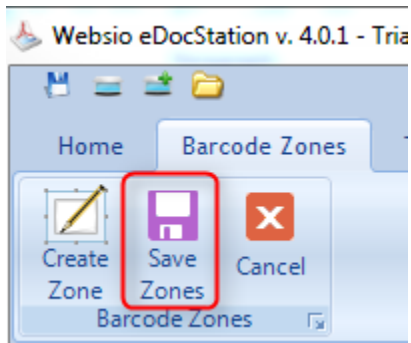
2	Standard Support Program for Document Preview http://www.websio.com/support.aspx	1	\$735.00
			Sub-total:
			Reseller Discount
			Total:

Conditions:

1. The license is domain-based (for unlimited number of SharePoint servers in the s: domain).
2. Trial-version activator will be sent by e-mail in two working days after the payer and approved.

value 1 Test Delete

Add additional zone selectors (if required) and press the button "Save Zones"

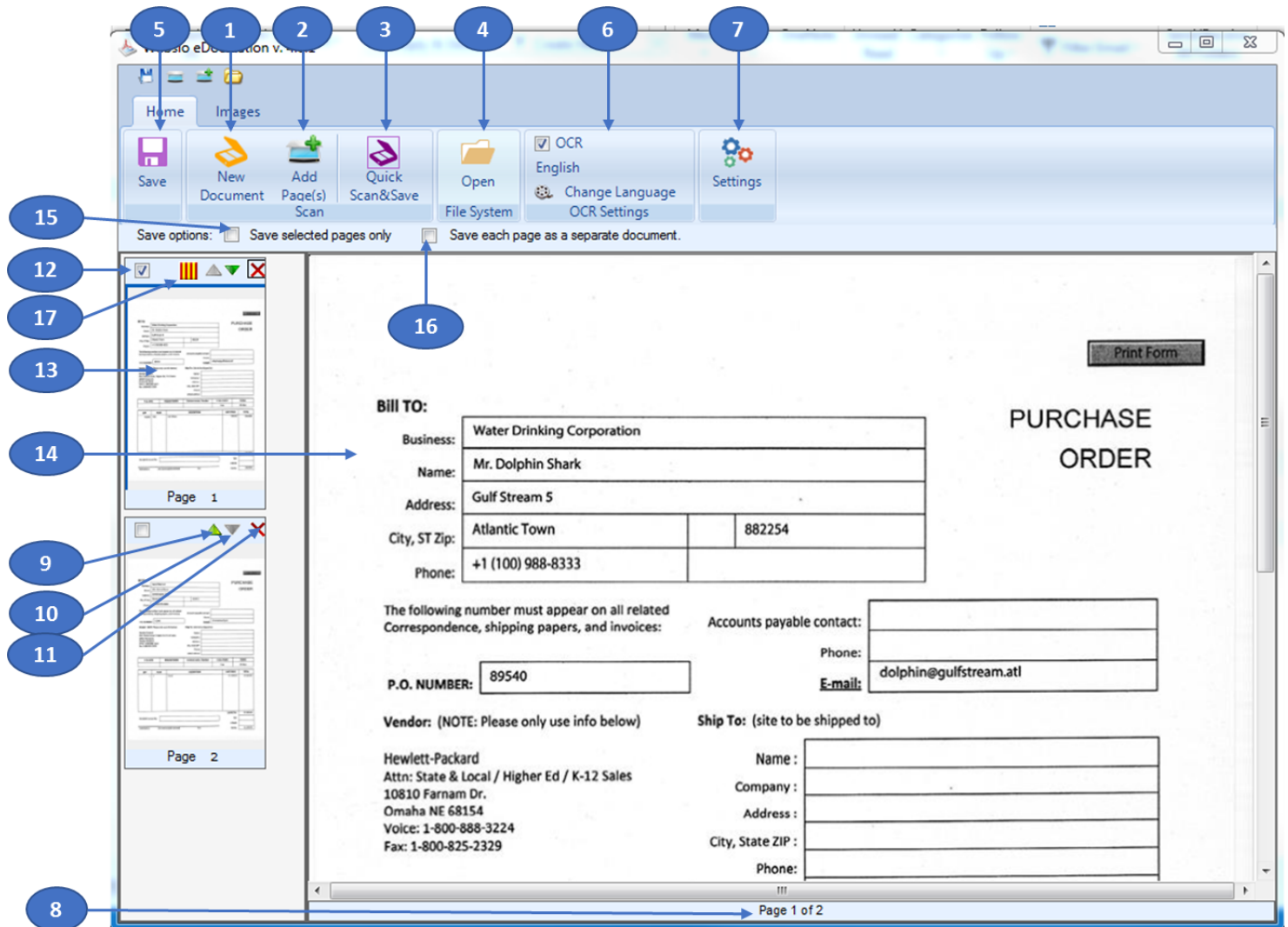


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User Interface

Main view. Tab "Home"



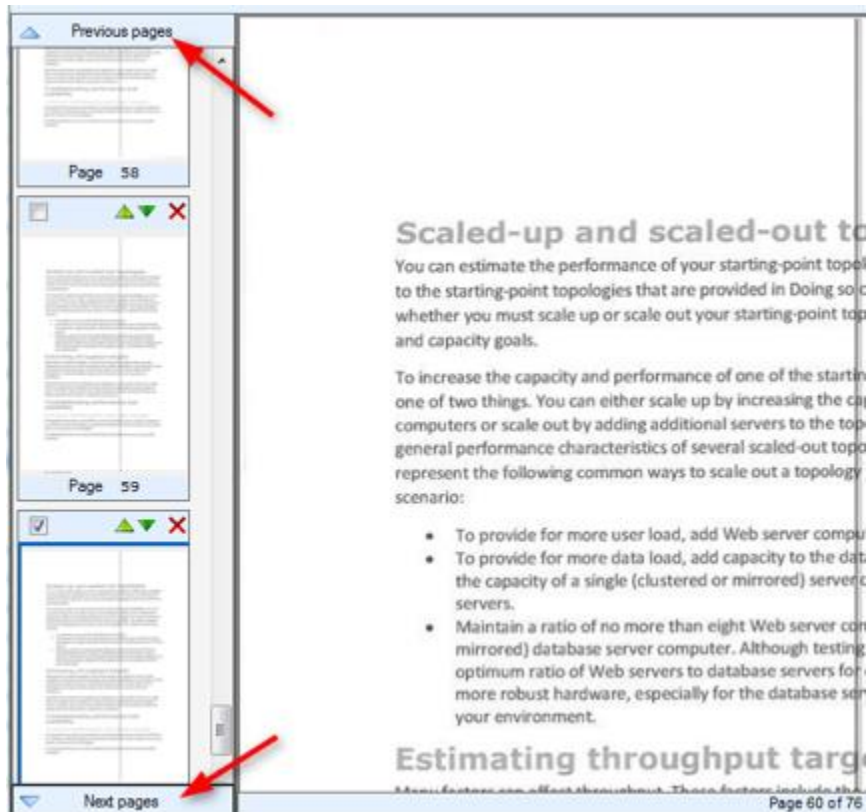
1. New Document. Use this button to scan new document.
2. Add Page(s). Scan pages and add them to the current page set
3. Quick Scan & Save.
4. Open. Add pages from existing image files from the file system.



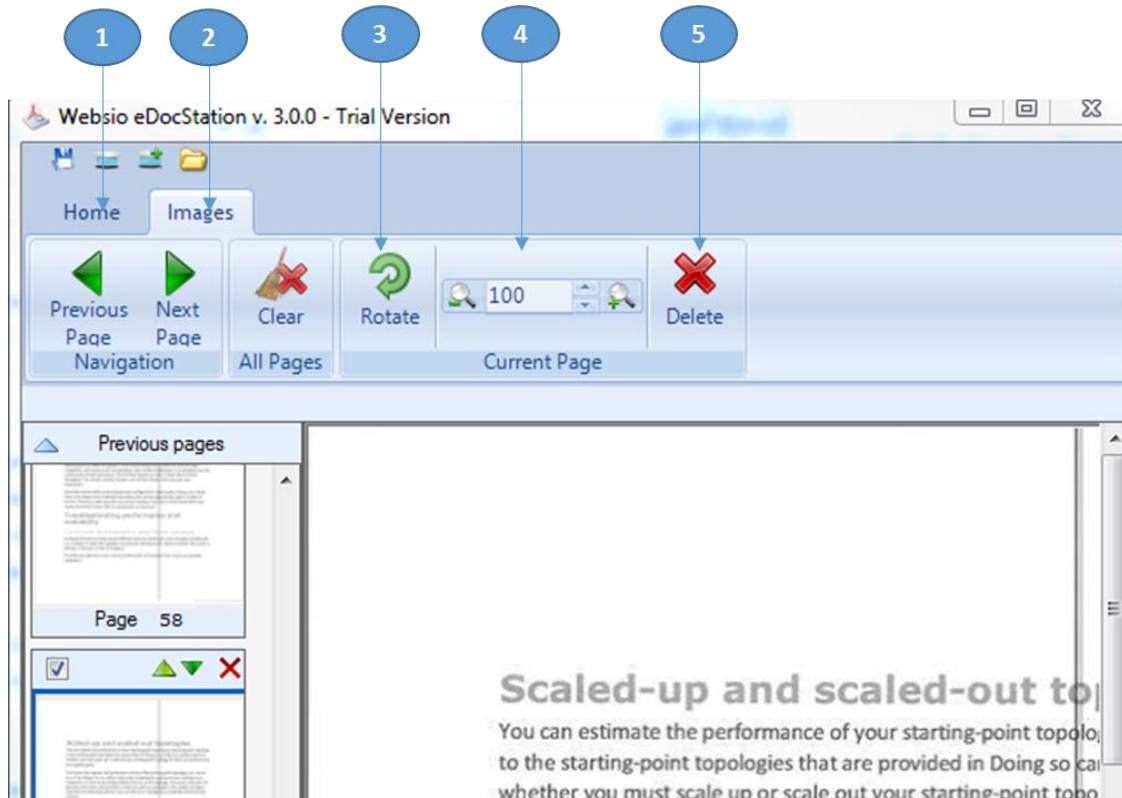
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5. Save. Save the document(s).
6. OCR. Select OCR checkbox to use text recognition process.
7. Settings.
8. Current page number and total pages count
9. Move page up.
10. Move page down.
11. Delete page
12. Page selector.
13. Page thumbnail
14. Main view
15. Save selected pages only. Select this option to create document from selected pages only.
16. Save each page as a separate document.
17. Button "View page properties". Available for scan from SharePoint only.

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

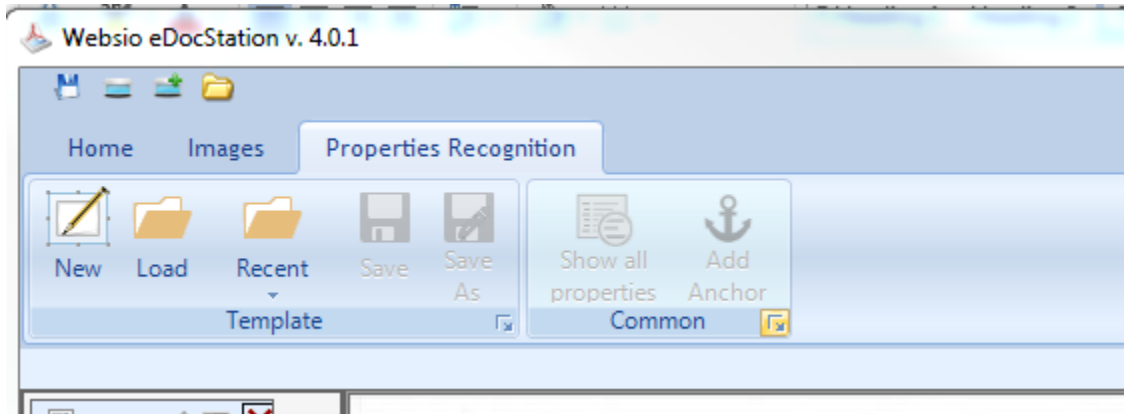


Tab "Images"



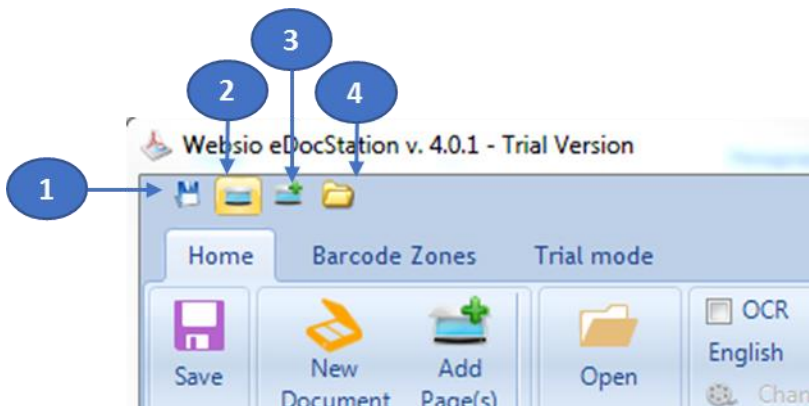
1. Navigation buttons
2. Clear. Delete all pages.
3. Rotate image.
4. Zoom
5. Delete current page

Tab “Properties Recognition”



Available for scan from SharePoint only

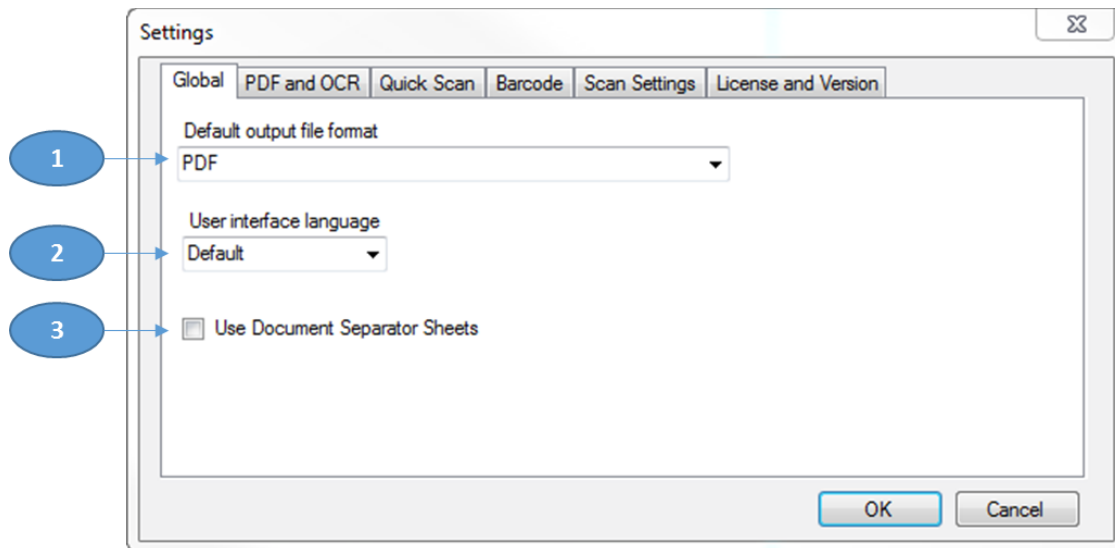
Quick Access Toolbar



1. Save.
2. Scan new document.
3. Add page(s). Scan new pages and add them to the current page set
4. Open. Add pages from existing image files, stored in file system.

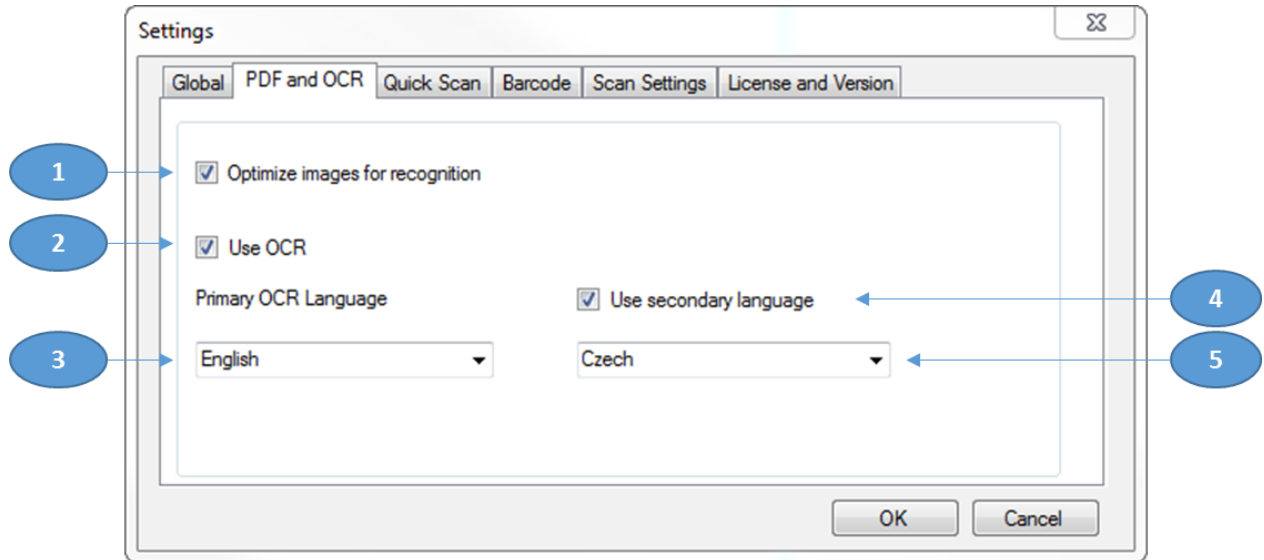
Settings

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.

PDF and OCR



1. Optimize image for recognition.
2. Use OCR – enable/disable OCR.
3. Default OCR languages.

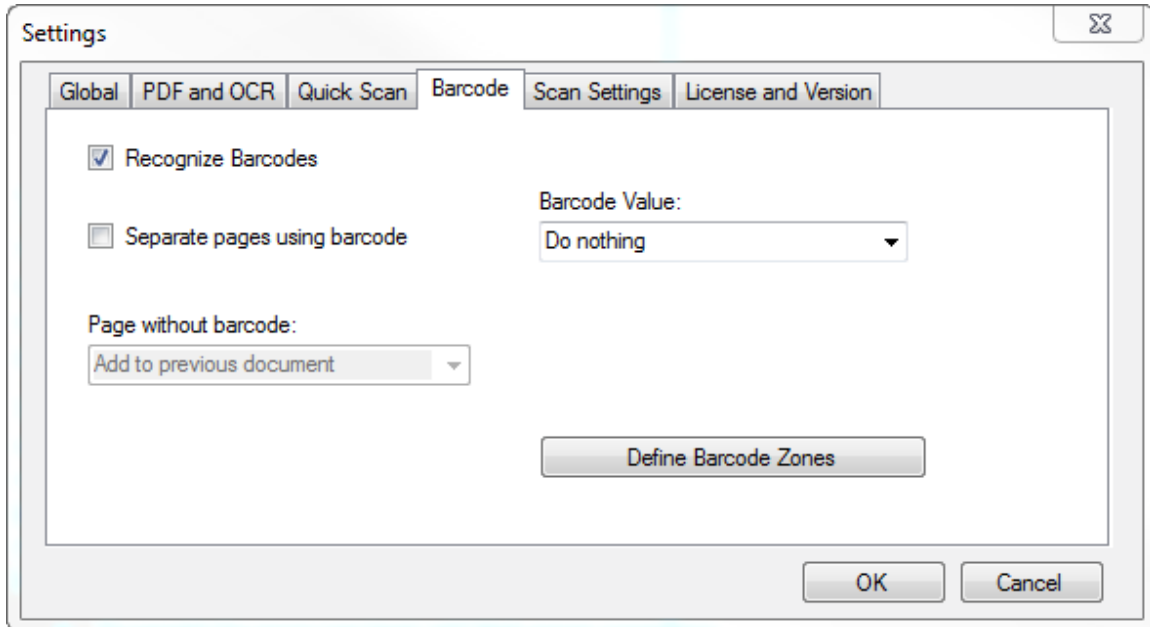
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.

Please pay attention: The eDocStation *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/product.aspx?ID=128>



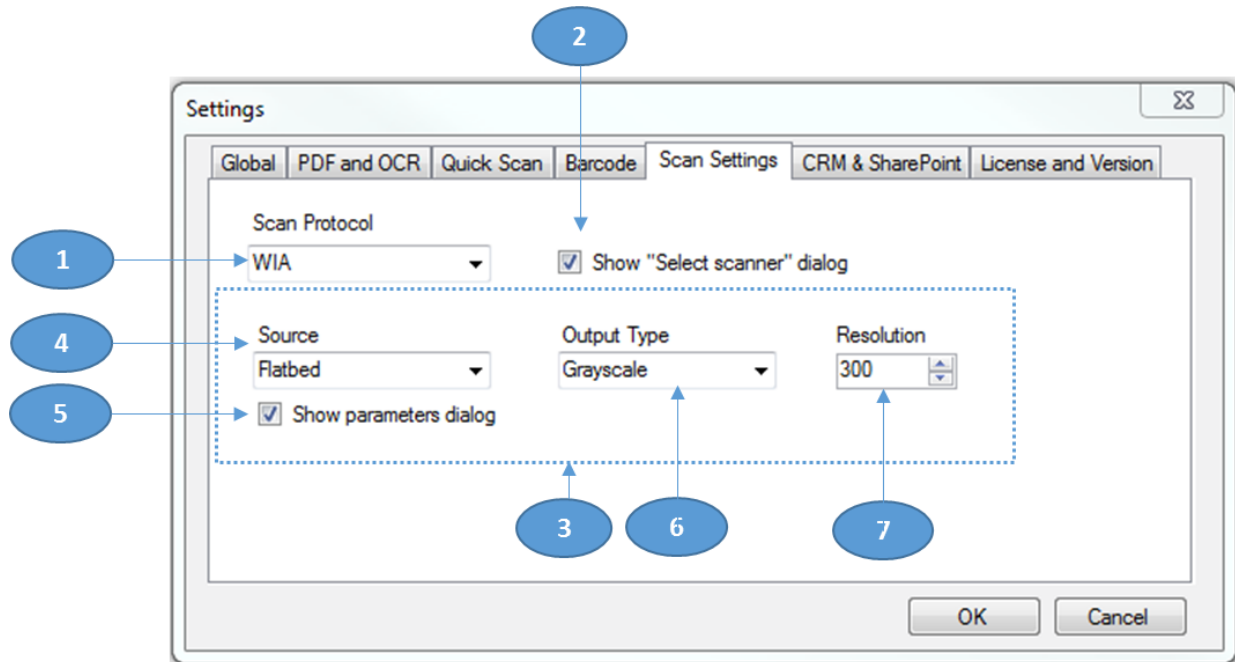
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Barcode



See section "[Barcodes](#)" above

Scan Settings



1. Scan protocol. TWAIN or WIA. Default value: WIA.
2. Show "Select Scanner" dialog. Select this option to select source scanner before scanning.
3. This group of options is available for WIA only.
When TWAIN protocol is selected, the eDocStation displays scanner-dependent dialog before scanning process. You can control paper source, resolution and other options from this dialog. Full set of available options depends on the software supplied with your scanner.
4. Source. Scan from flatbed glass or feeder.
5. Show parameters dialog before scan
6. Output type. Color, Grayscale or Black & White
7. Image resolution



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Special Settings

The screenshot shows the 'Settings' dialog box with the 'CRM & SharePoint' tab selected. The 'Organization Service URL' field is highlighted with a red arrow. The 'Clear credentials' button is also visible.

If you use CRM Online or Internet Facing Deployment, select corresponding checkbox and fill Organization Service URL. How to find Discovery Service URL:

1. Open your CRM site
2. Go to Settings->Customizations->Developer options

Developer Resources

Getting Started

[Developer Center](#) [Developer Forums](#) [SDK NuGet Packages](#)
[SDK Download](#) [Sample Code](#) [Developer Overview](#)

Connect your apps to this instance of Dynamics 365

Instance Web API

HTTP REST API providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).

Service Root URL

[Download OData Metadata](#)

Instance Reference Information

Use this information to uniquely identify this instance of Dynamics 365. You can use this to retrieve the current URL for this instance. For more information see [Azure extensions for Microsoft Dynamics 365](#).

ID

Unique Name

Connect your apps to the Dynamics 365 Discovery Service

Discovery Web API

HTTP REST API providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).

Organization Service

SOAP Service providing access to this instance of Dynamics 365. For more information see [Use the IOrganizationService web service to read and write data or metadata](#).

Endpoint Address

[Download WSDL](#)

Discovery Service

HTTP REST API providing access to this instance of Dynamics 365. For more information see [Microsoft Dynamics 365 Web API](#).



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Document Library Properties

1. When your destination document library contains required properties, document properties window will be opened automatically after the document will be uploaded.
2. CRM Scanner and PDF Plug-in can create link from the document to the related CRM entity:
 - a. Add to your document library/content type hyperlink property "CRM":

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
free name	Single line of text	✓
CRM	Hyperlink or Picture	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

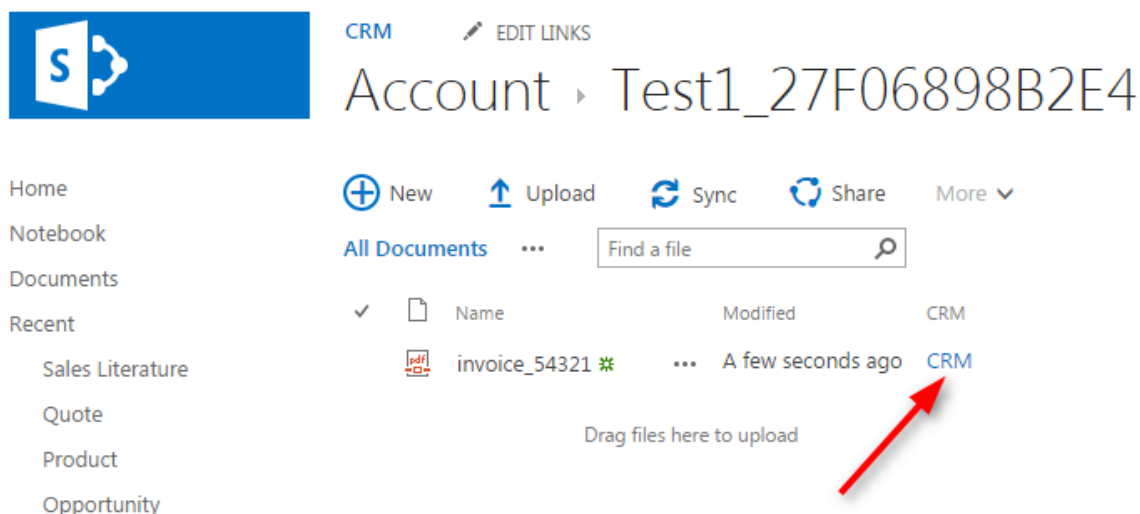
[Create column](#)

[Add from existing site columns](#)

[Column ordering](#)

[Indexed columns](#)

- b. This property will be automatically filled by CRM Scanner and PDF Plug-in:



- c. Click on the link to open related CRM entity.

Troubleshooting

Error message "Problem with installation package" appears during installation process



Solution:

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

After click on "Create eNote" or "Create eDocument" the eDocStation freezes or error is displayed.

1. 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 CRM, scan document and save it.
3. Next time you can launch IE in the common mode.



Solutions for information workers

Another problem

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

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.*

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