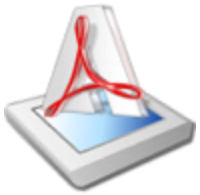
Solutions for information workers

The eDocStation



Administrator and User Guide

Version 2018.1.2

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Overview

The eDocStation is a powerful tool for scanning and composing documents from existing images or PDF files.

The eDocStation 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. PDF, TIFF, JPEG, PNG, BMP and GIF output formats.
8. Advanced compression technologies enabling best document quality with smallest file size
9. All types of Windows-compatible scanners: simple desktop and professional scanners with feeders, local-connected (USB) and network-connected (IP) scanners.
10. Multilingual user interface (English, Arabic, Czech, German, Hebrew, Russian)

Using the eDocStation you can store your documents in the file system, Microsoft SharePoint 2010/2013/2016/Online ** or Microsoft Dynamics CRM 2011/2013/2015/2016/Online***.

* Supported OCR languages:

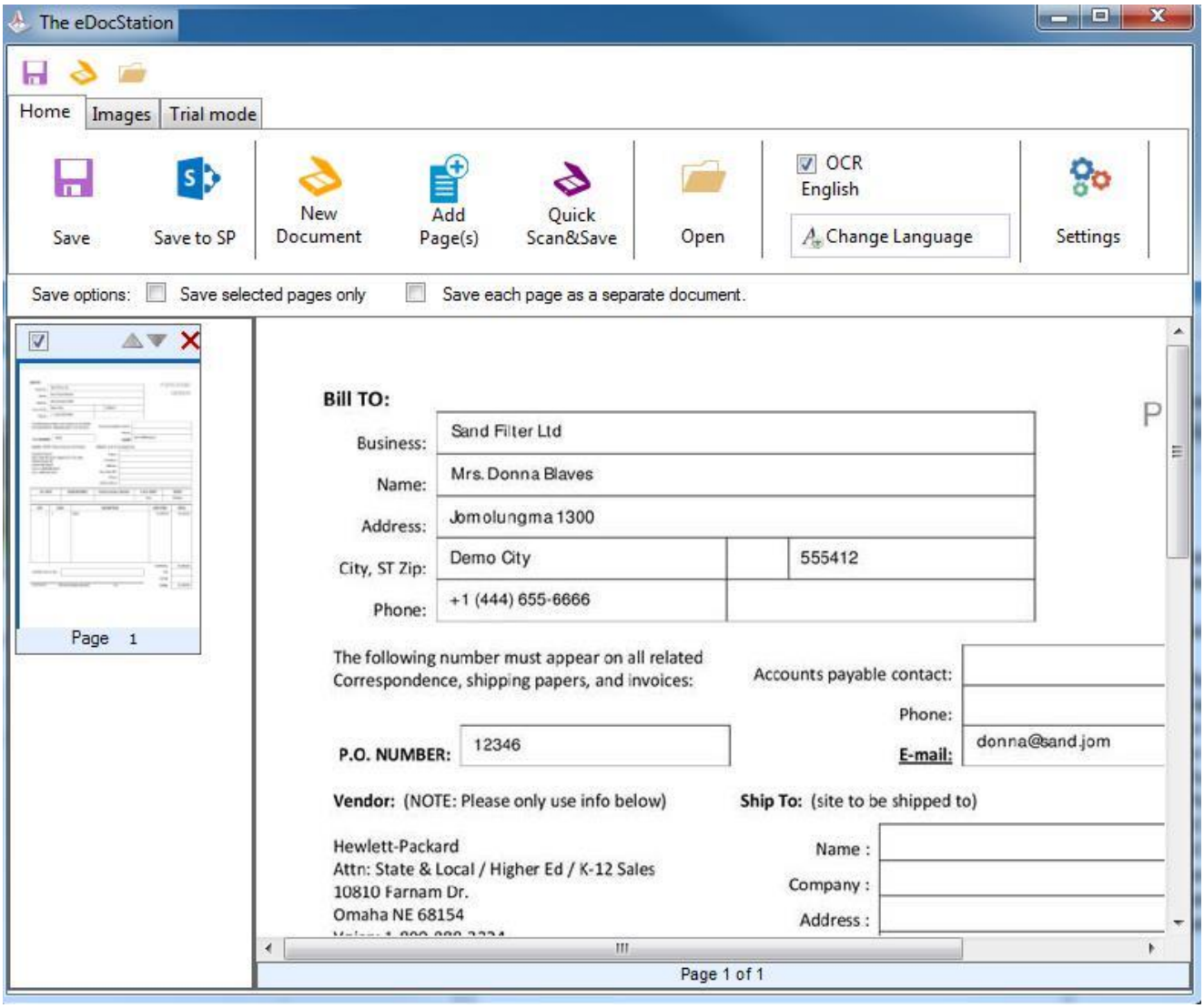
English, Afrikaans, Albanian, Arabic, Azerbaijani, Basque, Belarusian, Bengali, Bulgarian, Catalan, Cherokee, Chinese Simplified, Chinese Traditional, Croatian, Czech, Danish, Dutch, Esperanto, Estonian, Finnish, Frankish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Icelandic, Indonesian, 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

Solutions for information workers

** Requires SharePoint Scan, PDF and OCR Addin: http://websio.com/spscanocr.aspx

*** Requires Documents, Scan and OCR Plug-in for Dynamics CRM: http://websio.com/crmscanocr.aspx

Please pay attention: there are some differences between standalone mode and CRM/SharePoint mode. This document describes standalone mode only.



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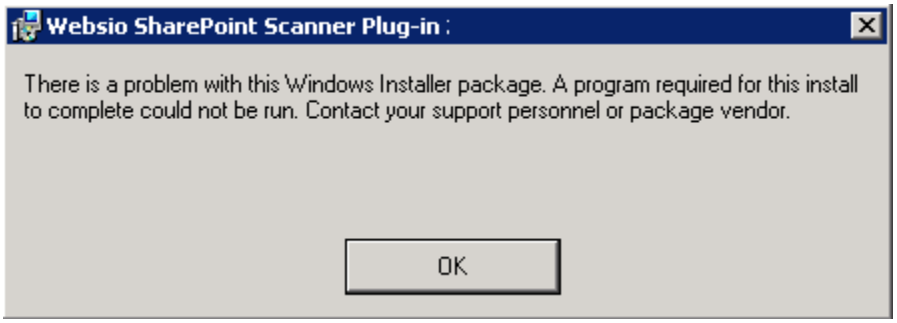
Requirements

- Microsoft .NET Framework 4.5.2 +
- Windows 7 / 8 / 10 (32 or 64 bit).

Installation

1. Unzip content of the edocstation.zip file on your computer
1. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the eDocStation installation wizard. Otherwise the error dialog box will alert you of the error that has occurred::



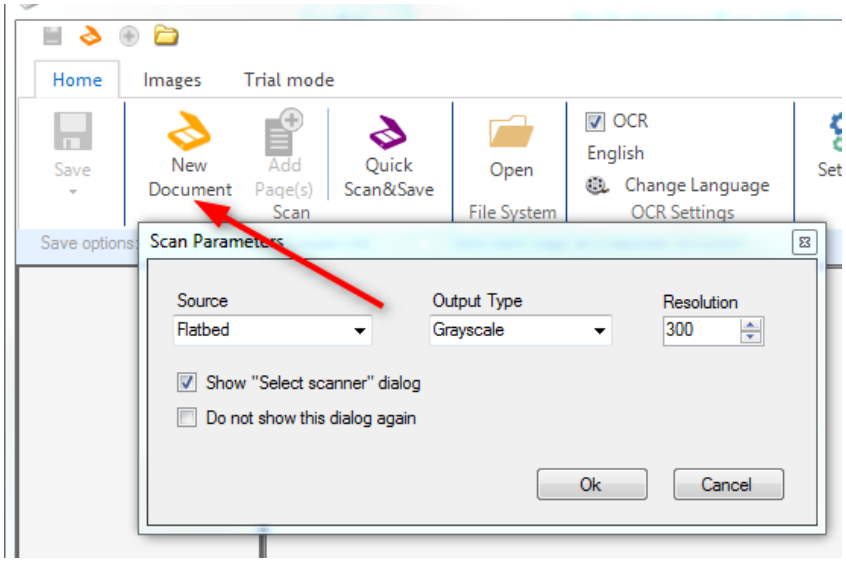
2. **Please pay attention!** Installation set contains English OCR language pack only. Download and install additional OCR language packs from our site: http://websio.com/ocrlangpacks.aspx
3. Windows Firewall alert may appear during installation. Approve network access for eDocLoader.exe.

How to use

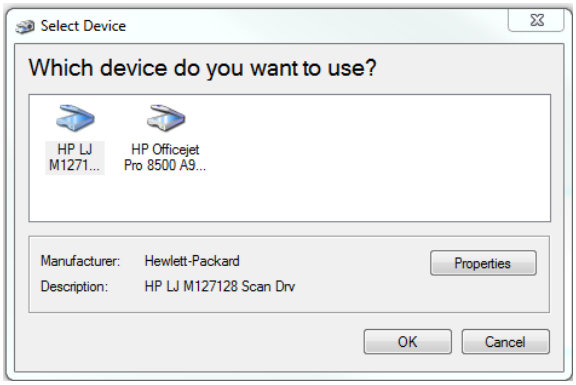
This document describes standalone mode of the eDocStation.
For information how to use the eDocStation with Microsoft SharePoint and/or Microsoft Dynamics CRM please visit our site : http://www.websio.com

Scan new document (Regular mode)

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

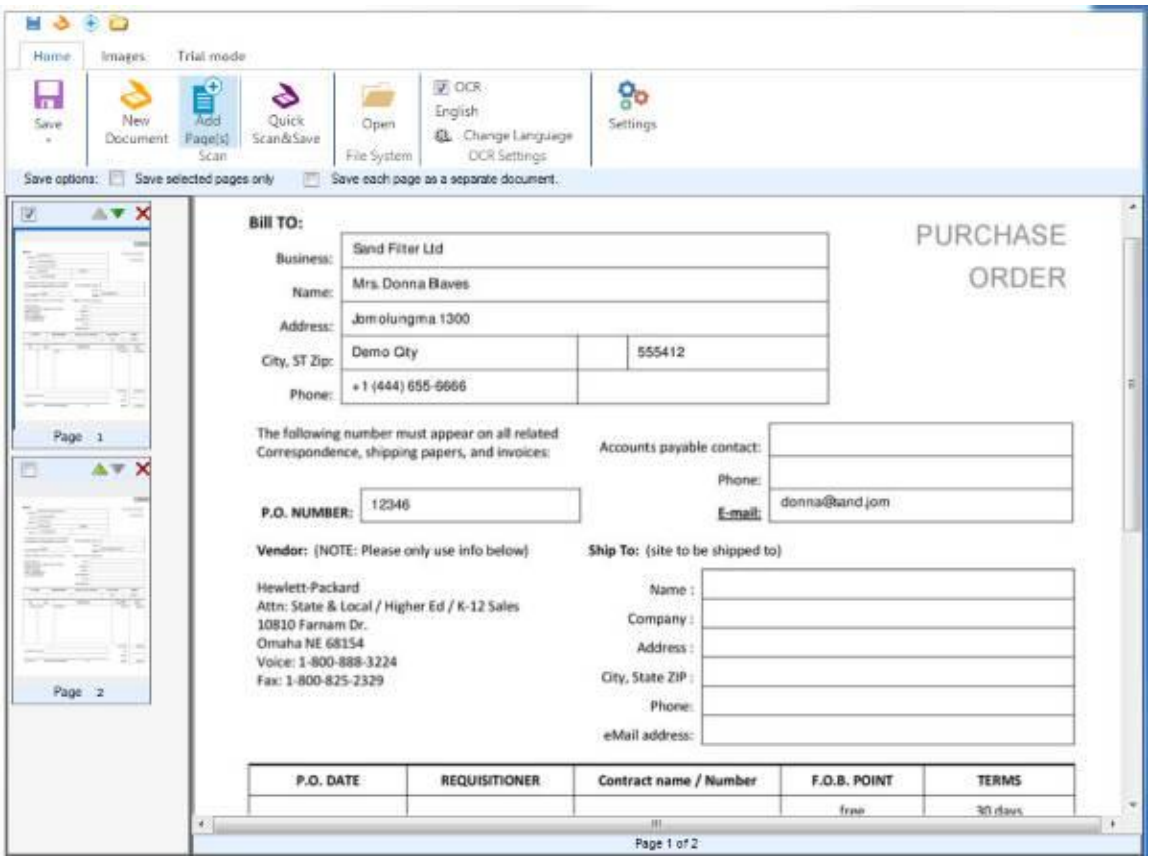


2. Select scanner



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

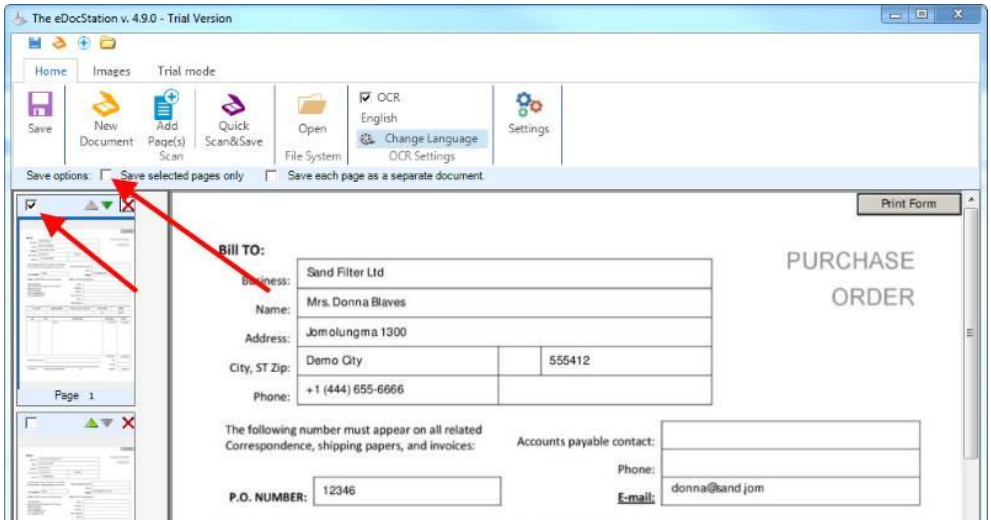
3. Scanned pages:



4. Press on the “Save”, select destination folder and enter file name.

Additional save options:

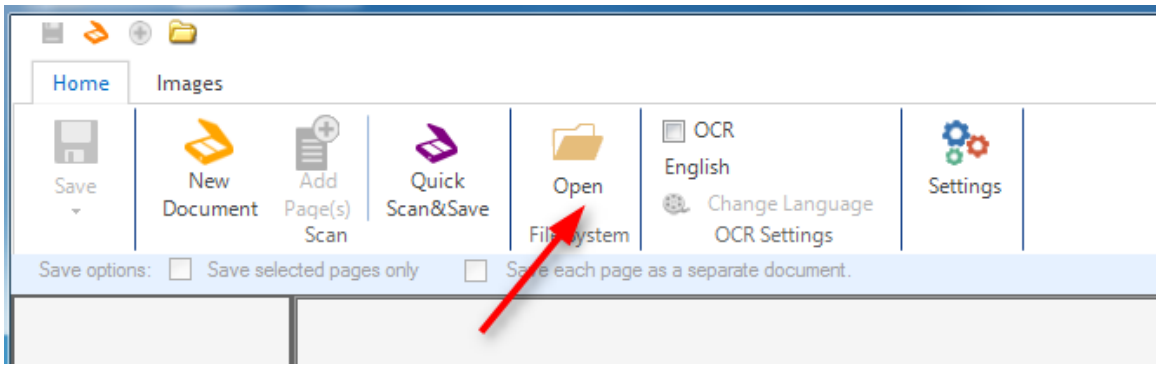
1. Save selected pages only:
   1.1. Select checkbox “Save selected pages only”
   1.2. Select pages
   1.3. Click on the button “Save”



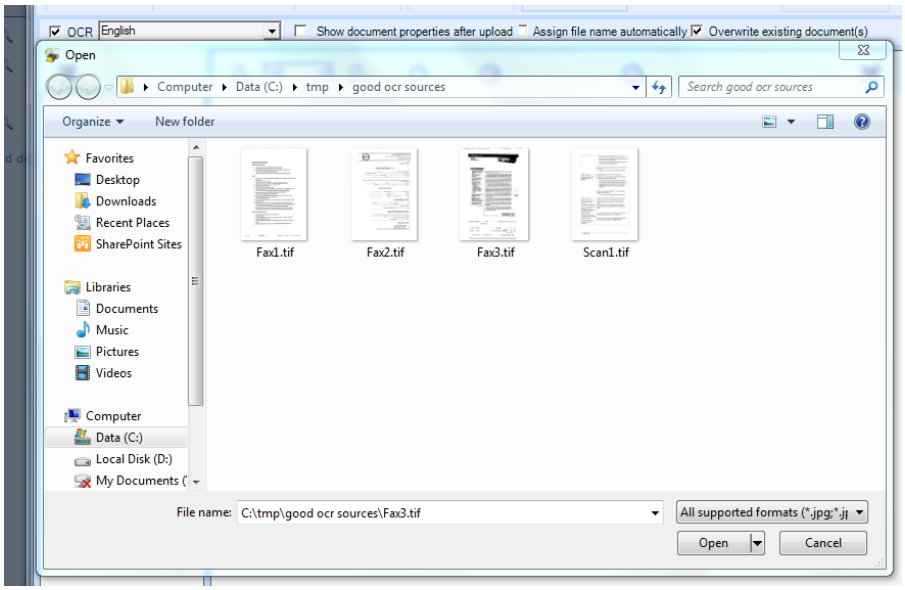
2. Save each page as a separate document:

Create document or add pages from an existing image(s)

1. Click on the button "Open"



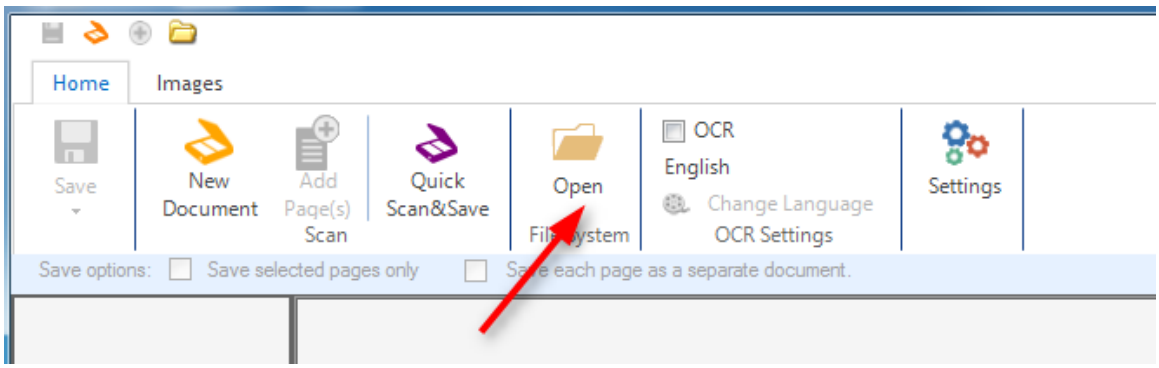
2. Select image (tif, jpg, png, gif, wmf or bmp) or PDF files



3. Selected files will appear in the eDocStation window. For multipage PDF and TIFF files, each page will be displayed separately.
4. Also, you can drag and drop files to the eDocStation surface

Quick Scan

1. Quick Scan mode allows one-click scan. Document are saved with automatic name and default format in the predefined folder.

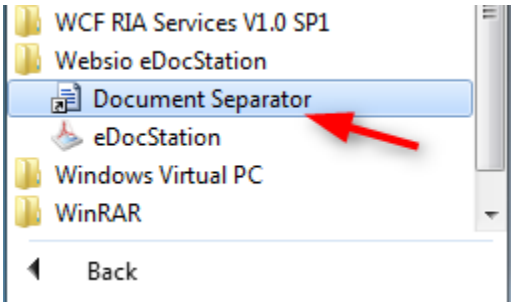


2. You can control Quick Scan parameters from the eDocStation settings. (See section "Settings" below).

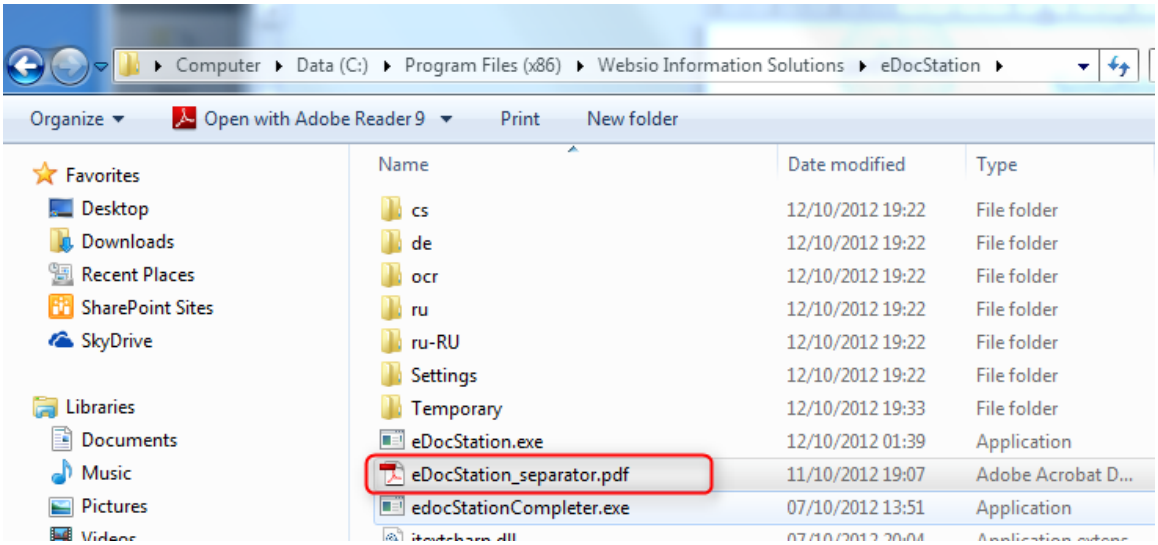
Document Separator Sheets

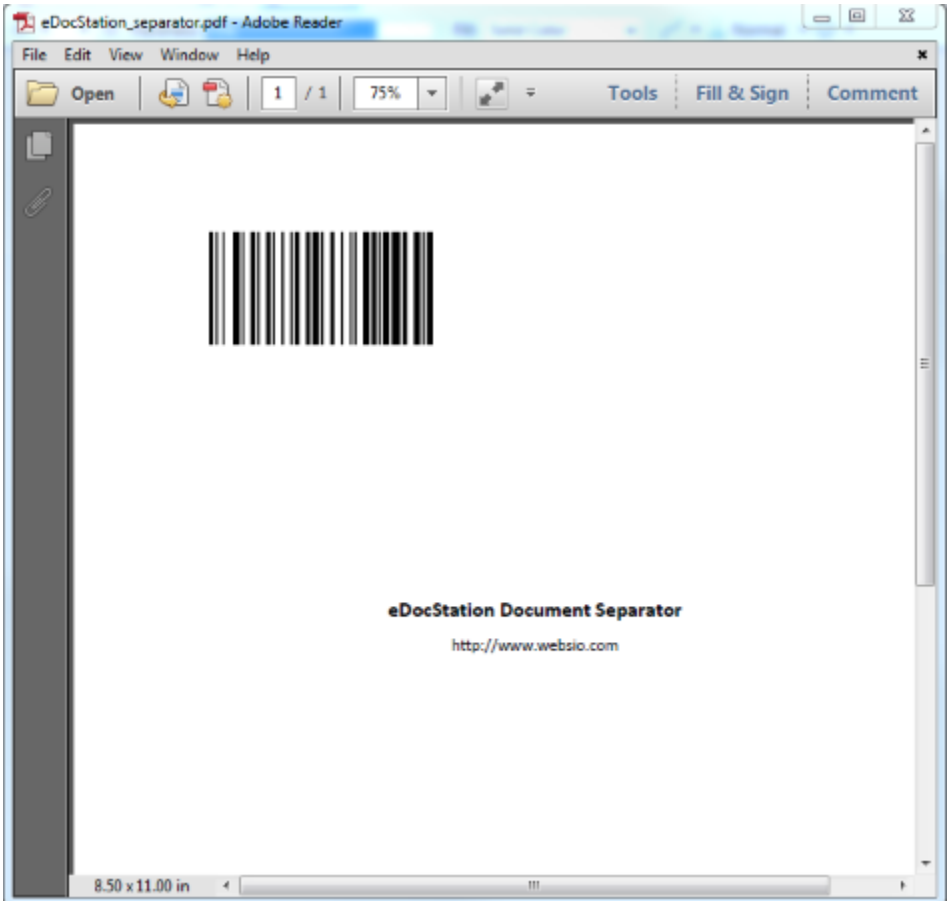
A separator sheet allows the scan application to detect when a new document should be started. It helps the scan operators to increase productivity and organize a stack of paper into logical documents. That eliminates the need for individually scan of each document either.

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





b. Print Separator Sheet in A4 format in a high quality.

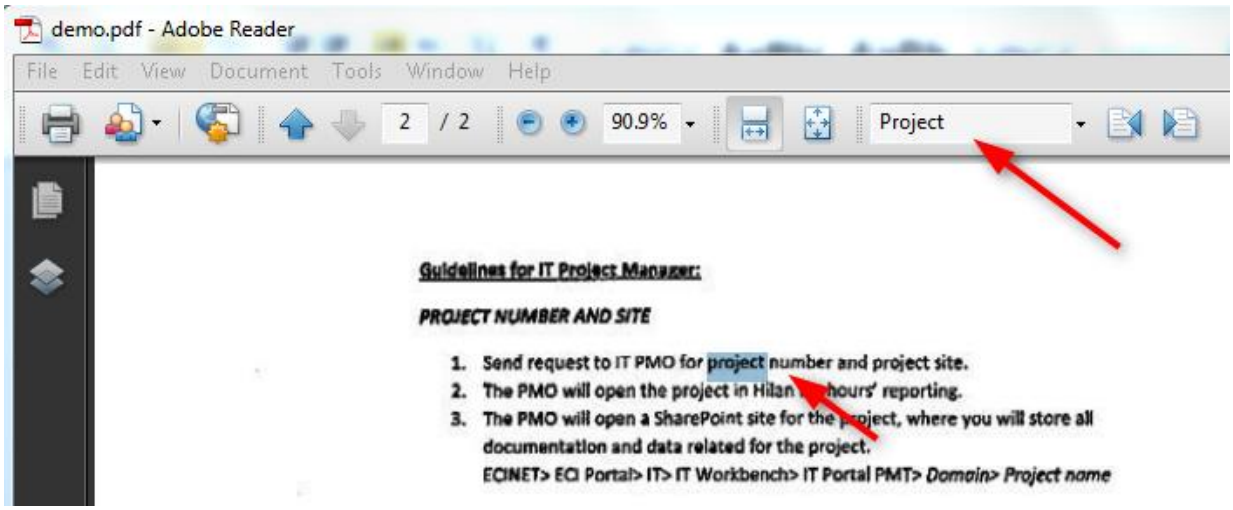
3. Separate documents in the scanner feeder by previously printed sheets
4. Scan documents. Quick Scan mode is recommended but not required.

OCR – convert images to searchable PDF

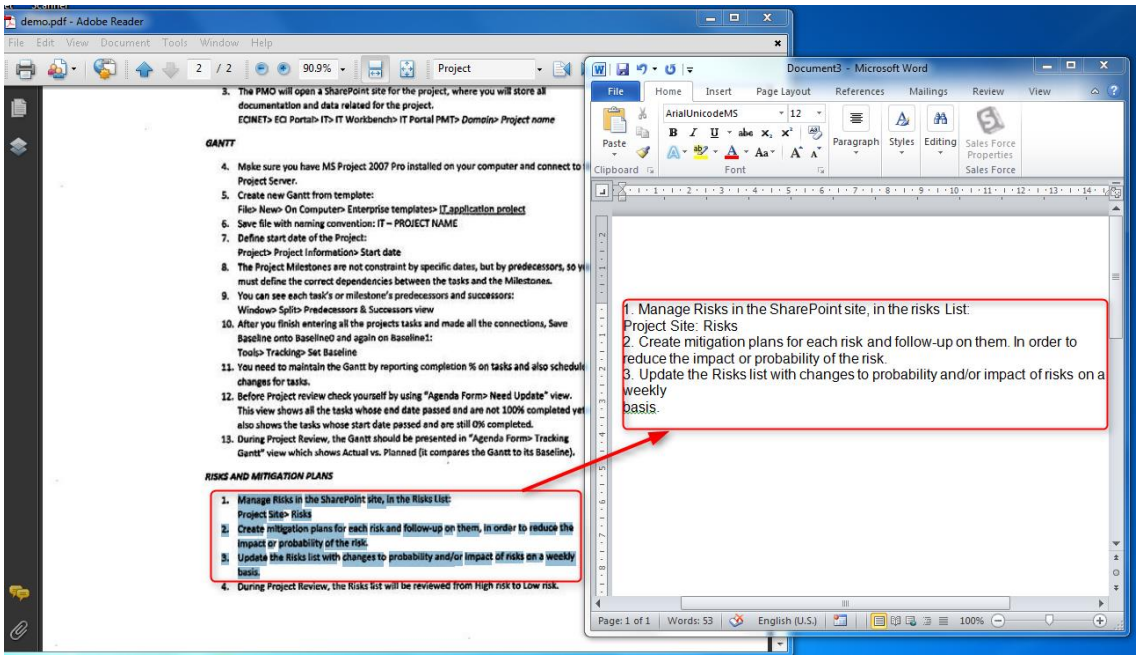
Searchable PDF (document created using OCR process) advantages:

a. Search documents by content using standard SharePoint search engine

b. Search text in the document:

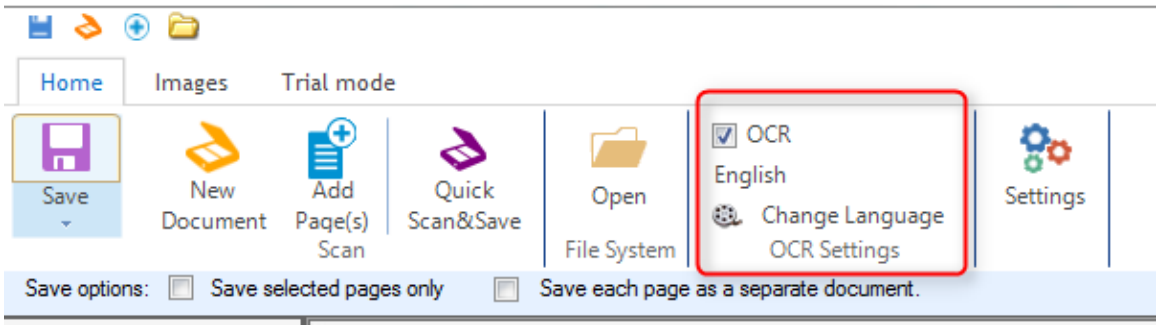


c. Copy text from the document:

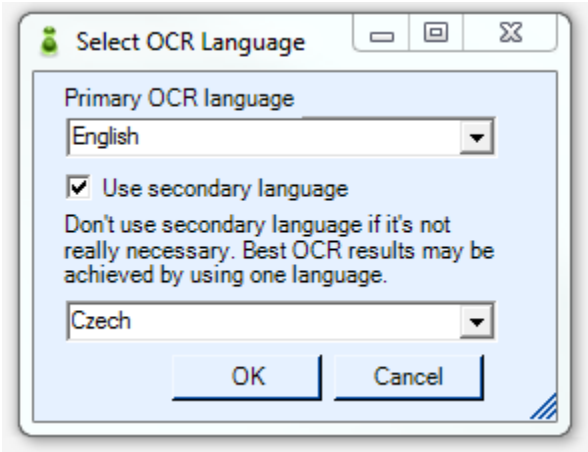


The best OCR (text recognition) quality can be reached for images scanned in grayscale with 300 dpi resolution.

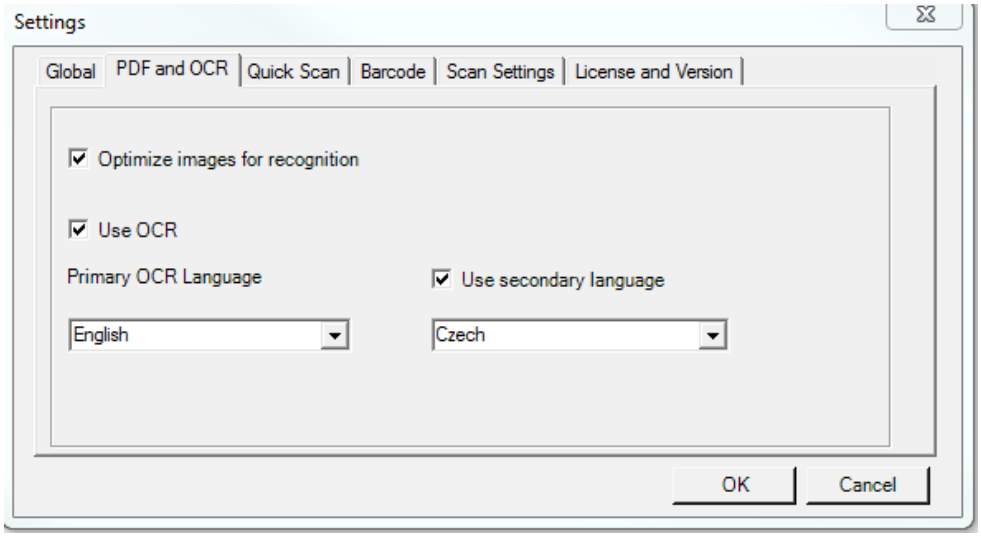
1. Select checkbox "OCR" and document languages to create searchable document.



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



Set default OCR parameters using eDocStation settings:



Important! The eDocStation *out of the box* contains 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.

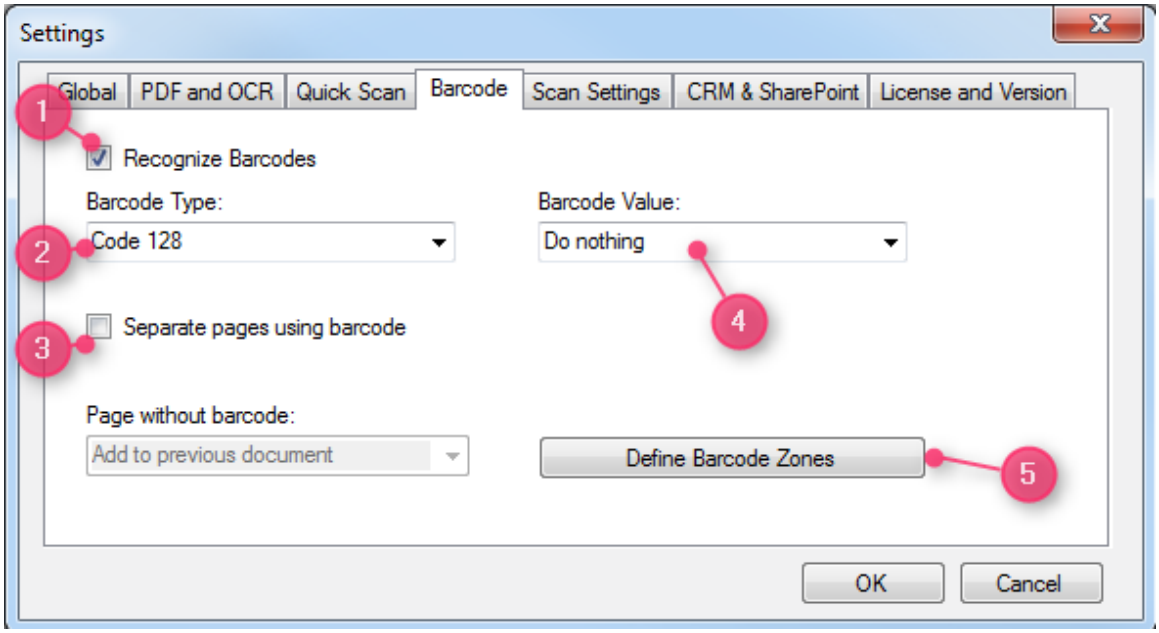
3. OCR is available for all scan modes: Regular Scan, Quick Scan and Document per page mode.

Properties Recognition - Zonal OCR

This feature is available for SharePoint mode only. Read User Guide for SharePoint Scan, PDF and OCR Addin.

Barcodes

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



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” (4):

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

Barcode Value

This feature is available for SharePoint only. Read User Guide for SharePoint Scan, PDF and OCR Addin.

Barcode Zones

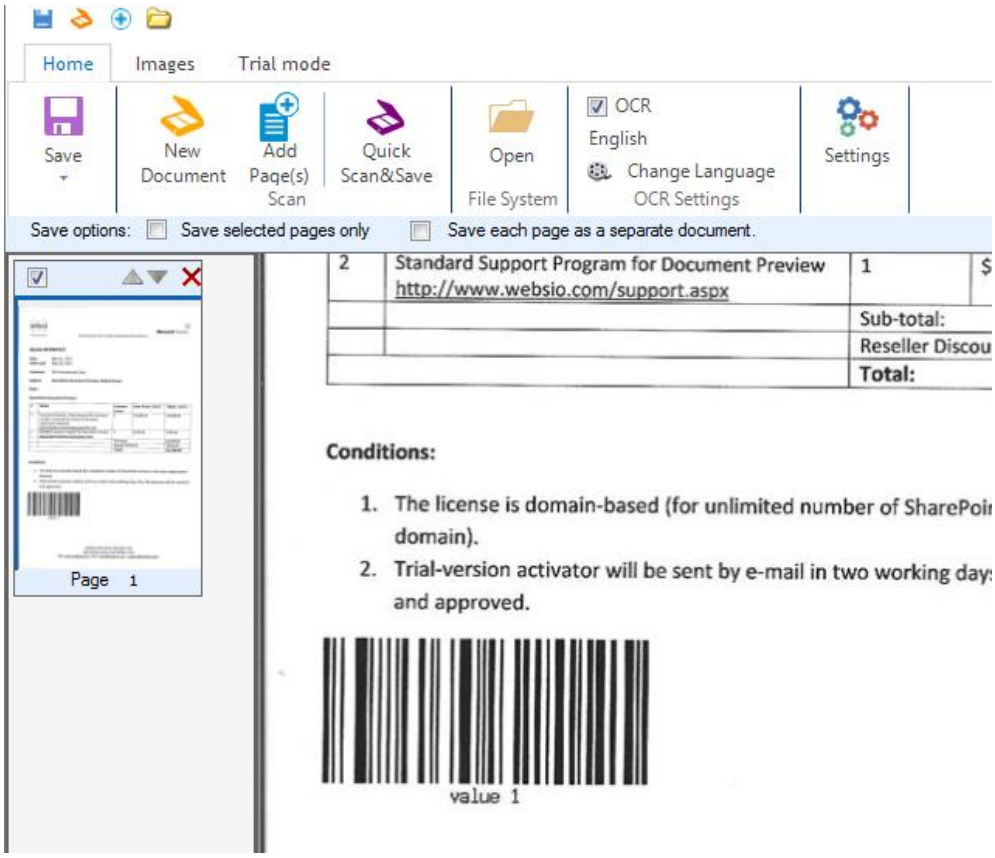
Barcode recognition on the entire page surface is a time-consuming process. The best way to reduce barcode recognition time is to define barcode zones.
Barcode zone is a rectangle where the eDocStation looks for the barcode. You can define as many barcode zones as you wish. Of course, reducing count of barcode zones will reduce barcode recognition time.

Important rules:

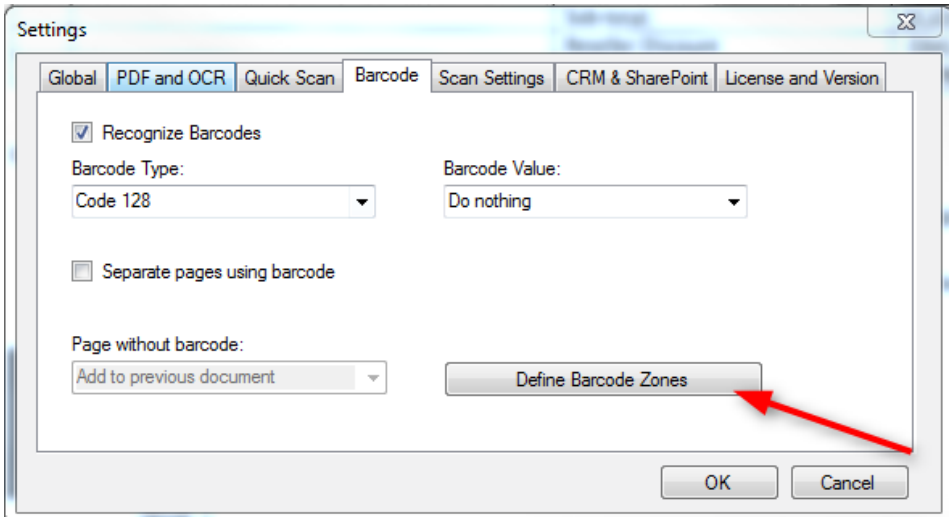
1. When barcode zones are not defined, the eDocStation looks for barcode on the entire page
2. When one or more barcode zones are defined, the eDocStation looks for barcode in the barcode zones only.

How to define barcode zones:

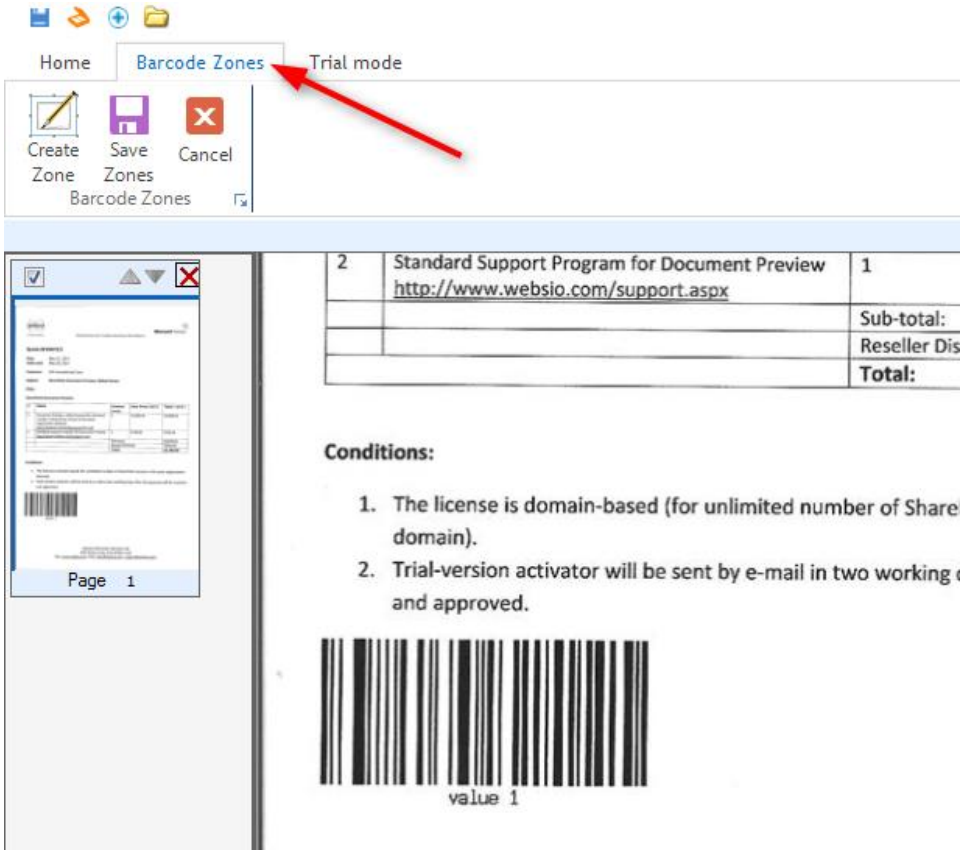
1. Load page containing barcode



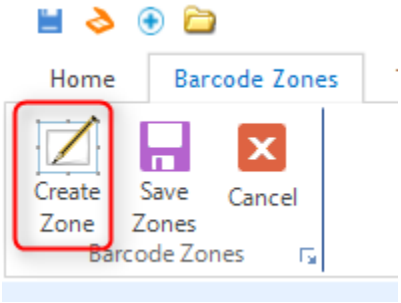
2. Go to Settings -> Barcode and click on the "Define barcode zones"



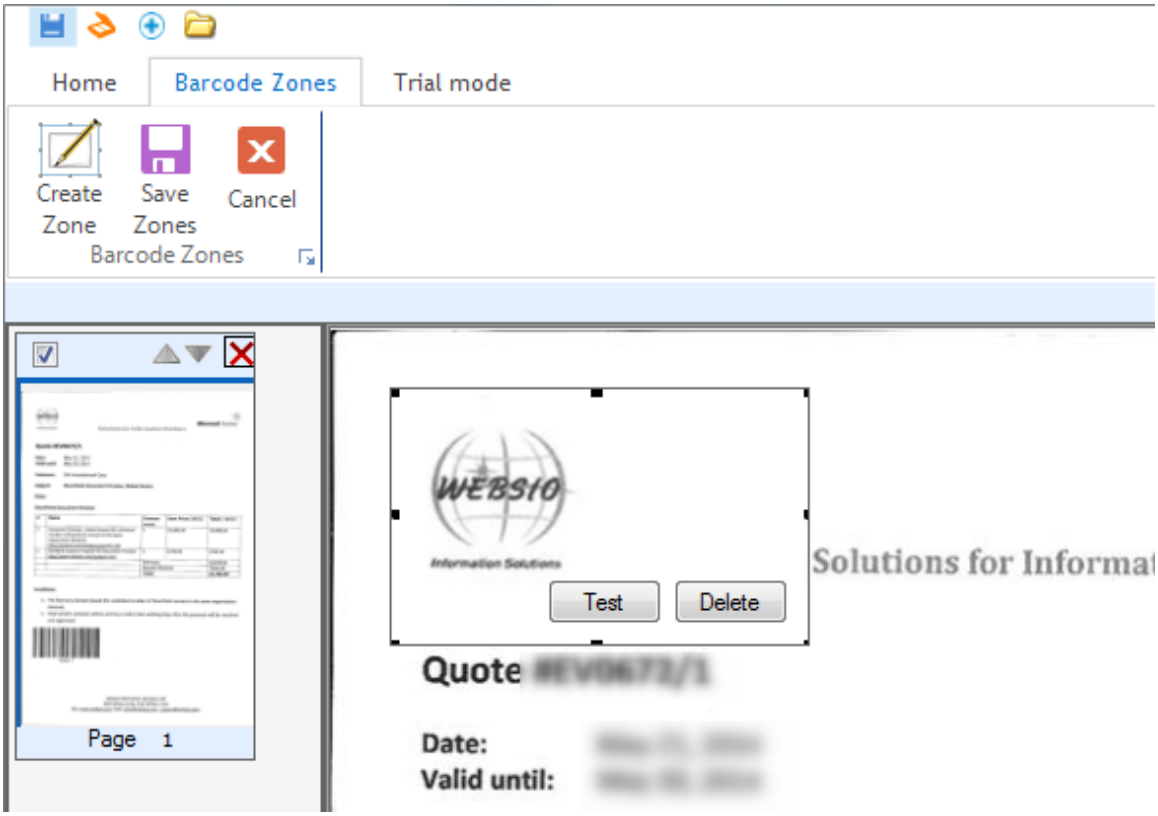
3. New tab "Zones" will be displayed. Existing zones will be shown on the image surface.



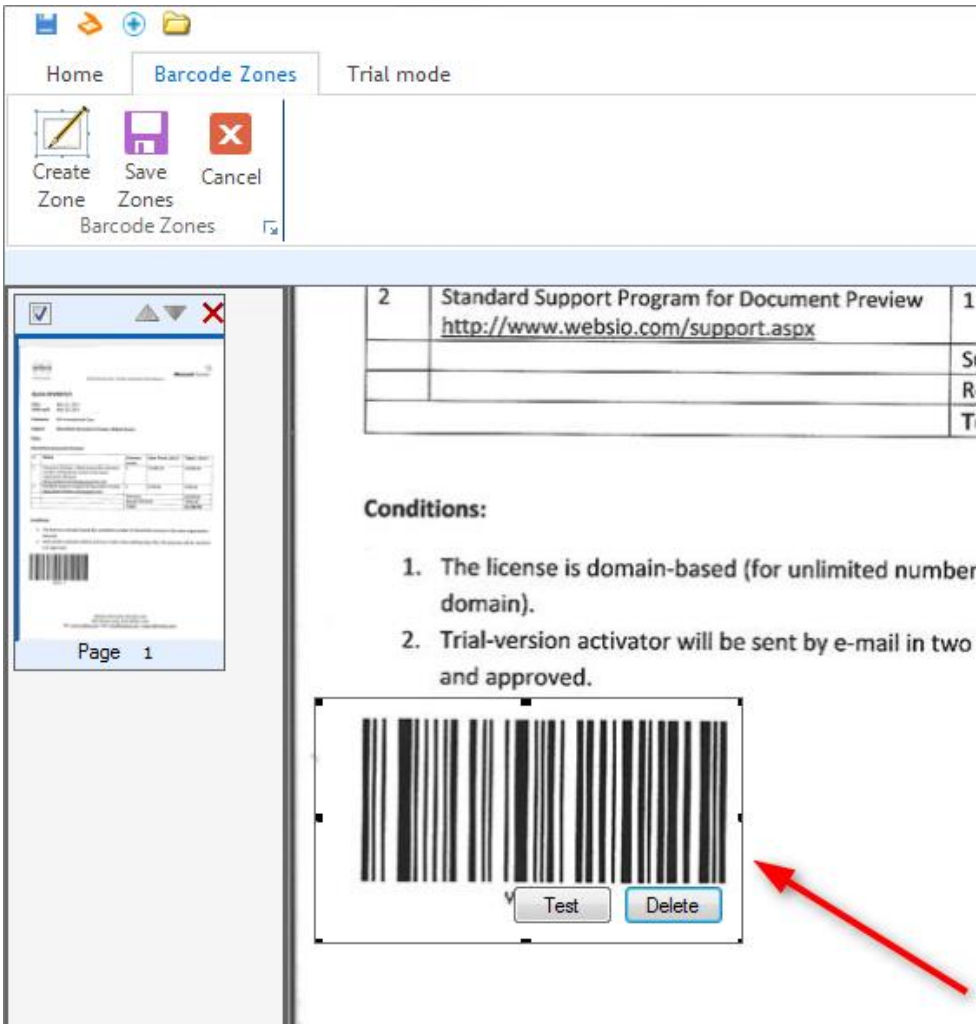
4. Create new zone:
   - Click on the button “Create Zone”



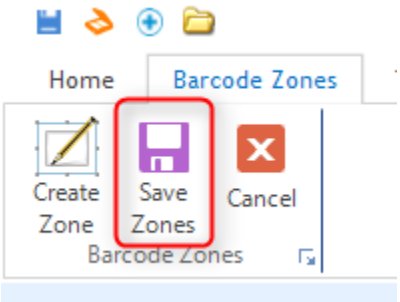
   - Zone selector will be added to the top-left corner of the image surface



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

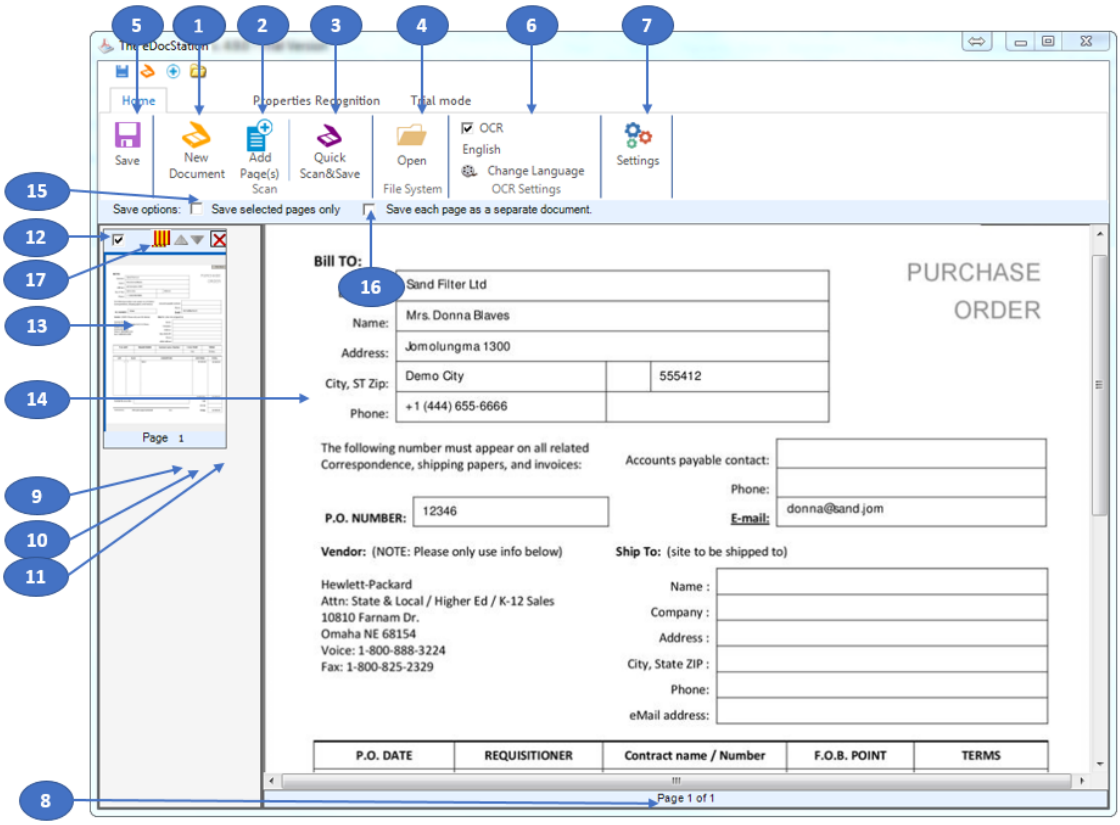


Add additional zone selectors (if required) and press the button “Save Zones”



User Interface

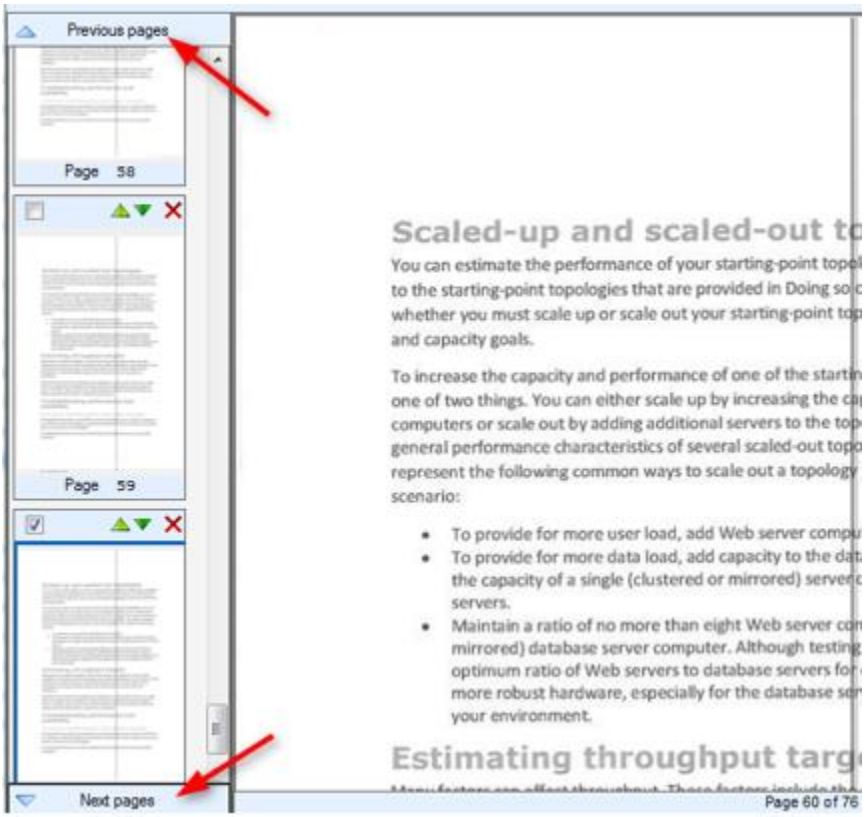
Main view. Tab "Home"



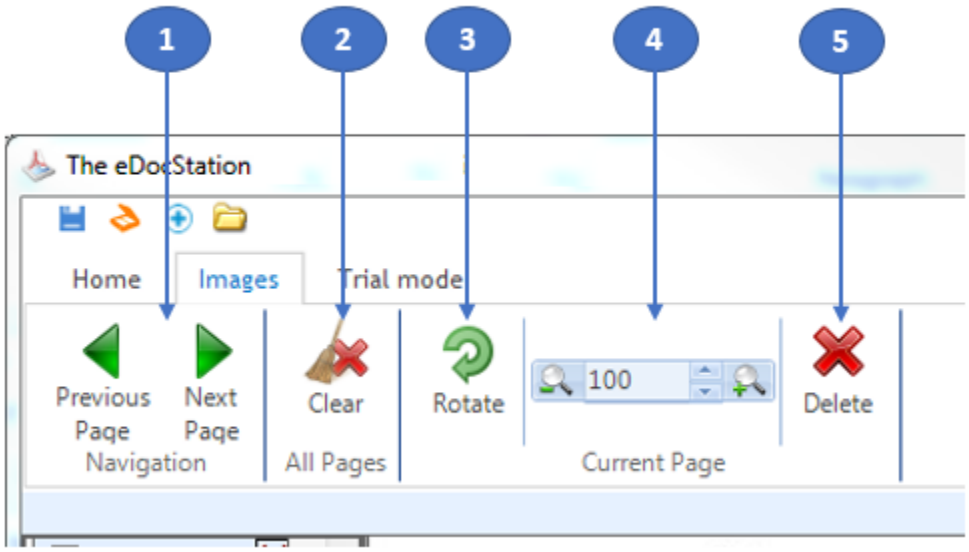
1. New Document. Use this button to scan new document.
2. Add Page(s). Scan pages and add them to the current page set
3. Quick Scan & Save.
4. Open. Add pages from existing image files from the file system.
5. Save. Save the document(s).
6. OCR. Select OCR checkbox to use text recognition process.
7. 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.

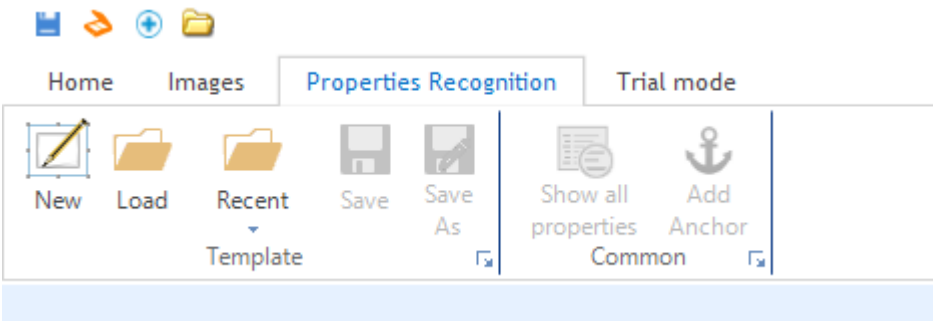


Tab "Images"



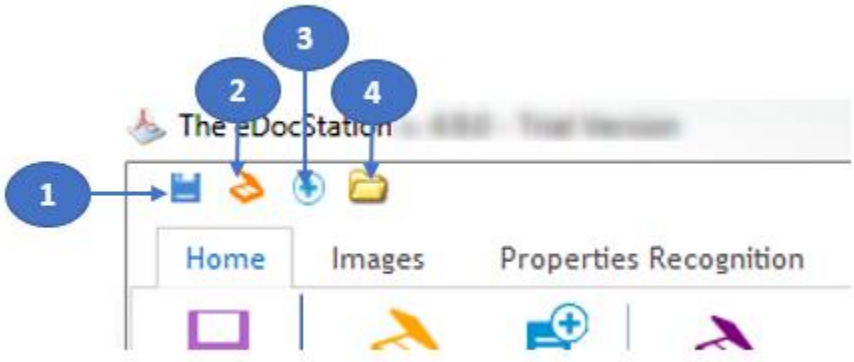
1. Navigation buttons
2. Clear. Delete all pages.
3. Rotate image.
4. Zoom
5. Delete current page

Tab "Properties Recognition"



Available for scan from SharePoint only

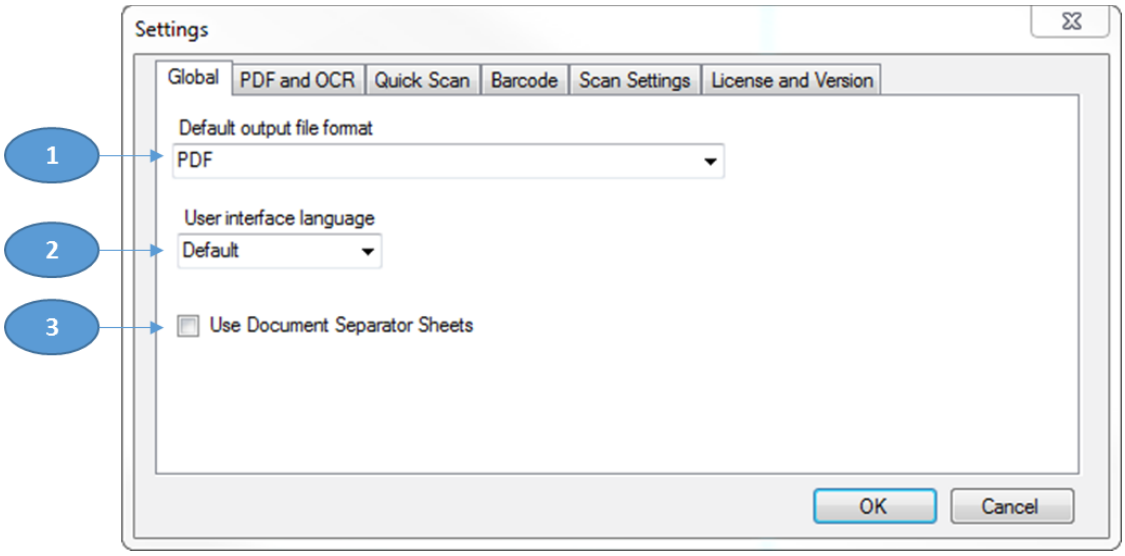
Quick Access Toolbar



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.

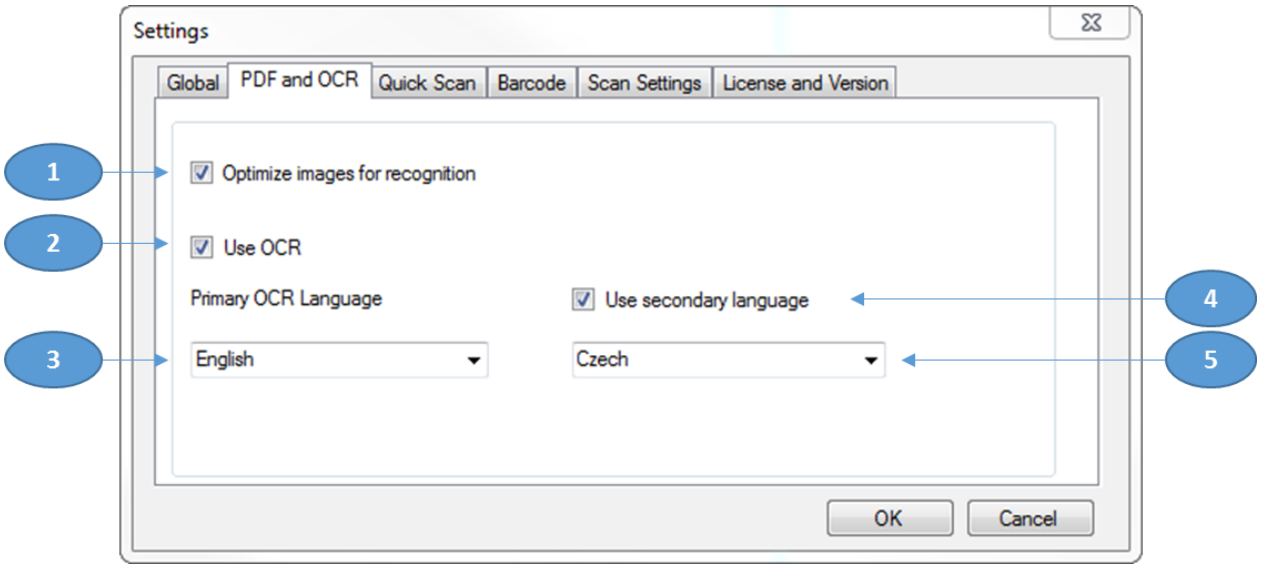
Settings

Global



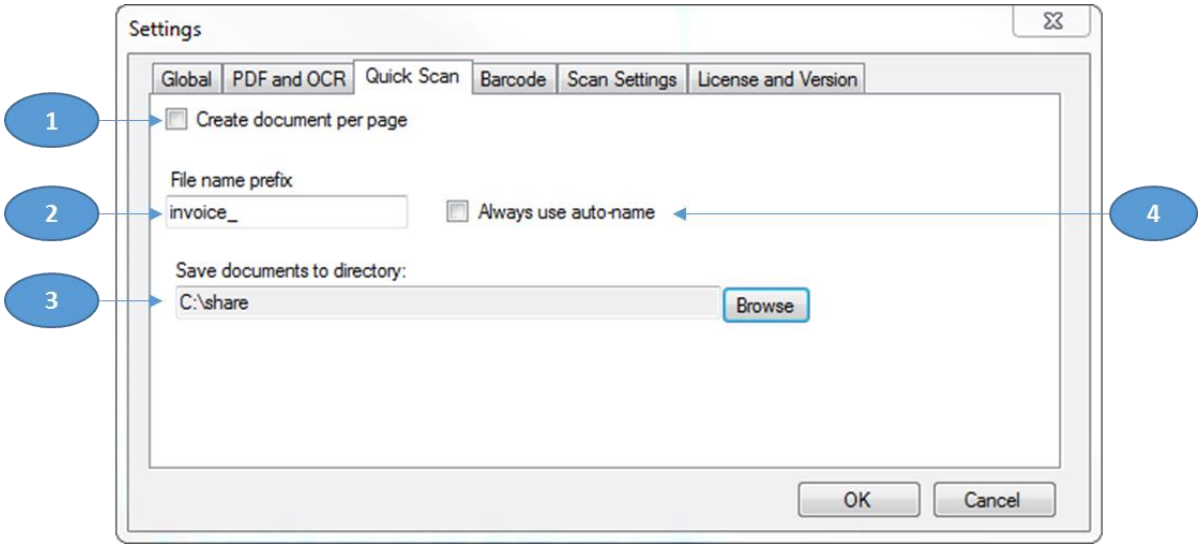
1. Default output file format. The following formats are supported: PDF, TIFF, JPG, GIF, PNG or BMP
2. User interface language. English, German, Czech, Russian, Arabic and Hebrew languages are available.
3. Use Document Separator Sheets. See section "Document Separator Sheets" above.

PDF and OCR



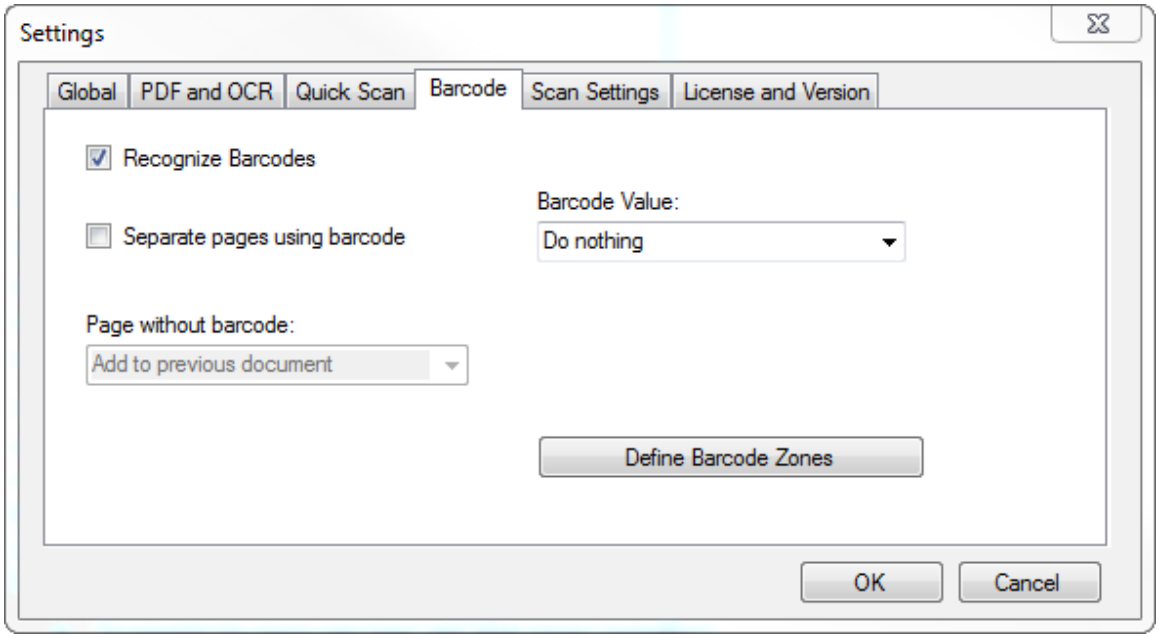
1. Optimize image for recognition.
2. Use OCR – enable/disable OCR.
3. Default OCR languages.

Quick Scan



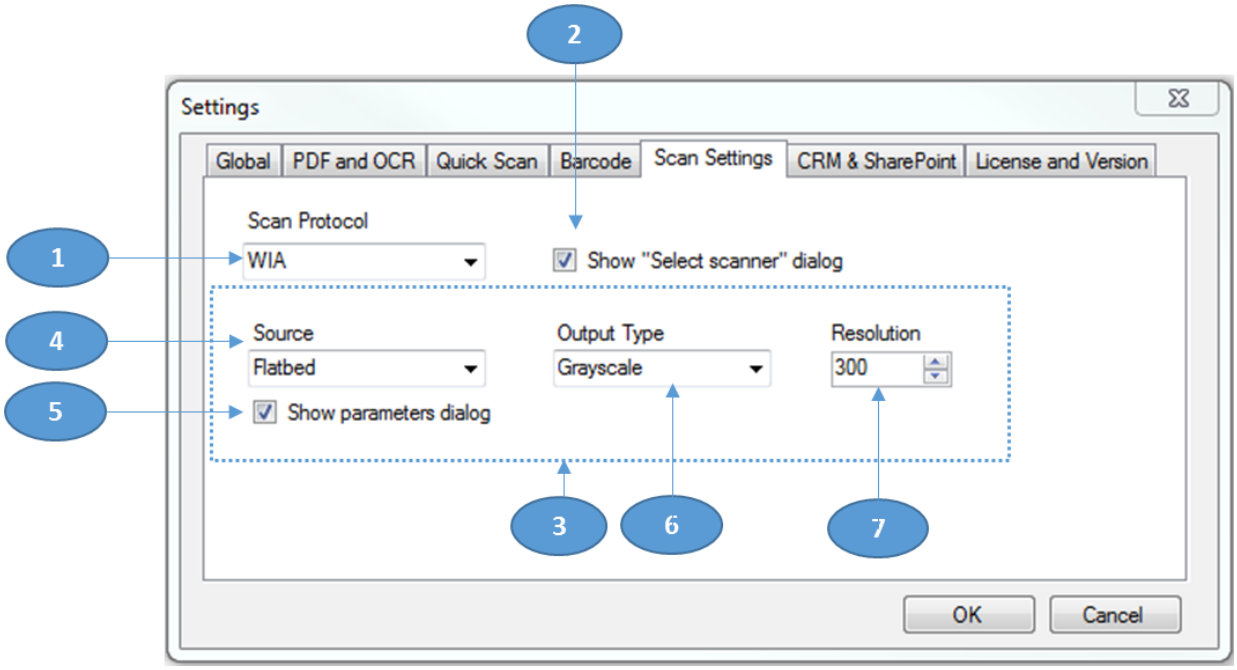
1. Create document per page in the Quick Scan mode.
2. Prefix for auto-generated file name.
3. Destination directory for Quick Scan.
4. Always use auto-name. Select this option to use automatic name in the Regular mode either. When this option is selected, “document name” will be given automatically.

Barcode



See section "Barcodes" above

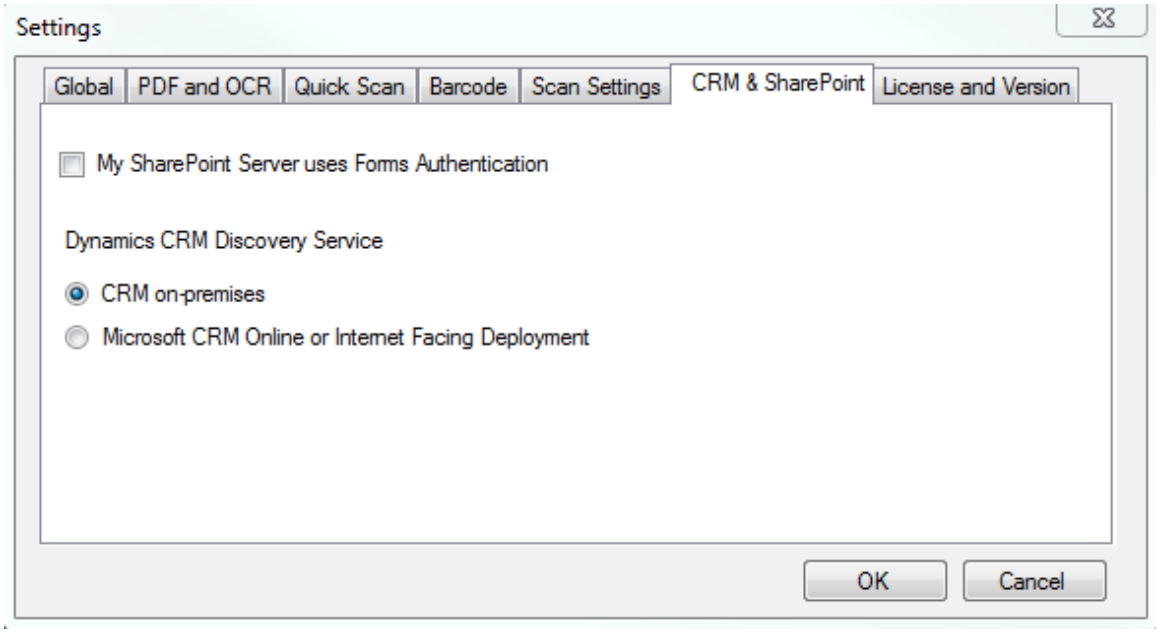
Scan Settings



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 scannig 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

Special Settings



These settings are used by SharePoint and Dynamics CRM Scanner Plug-ins only.

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.*