



Solutions for information workers

SharePoint Scan, PDF and OCR Plug-in 2013



Administrator and User Guide

Version:
Server 11.5.x; Client 2018.1.2



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Note

Features marked by sign **P** are available for the Professional version only

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 Plug-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 for more than 50 languages* **P**
2. Properties recognition - Zonal OCR **P ****
3. Barcode recognition **P**
4. Automatic upload of files from the folders on the local computer to SharePoint **P *****
5. Scanning multiple documents in a single batch using document separator sheets or barcode separation **P**
6. Saving pages as:
 - o Single document
 - o Document per page
 - o Multiple documents using document separator sheets **P**
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 enable 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 (Internet Explorer, Edge, Chrome, Firefox).

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13. Multilingual user interface (English, Arabic, Czech, German, Hebrew, Russian)

* 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

** License for Zonal OCR Extension is required

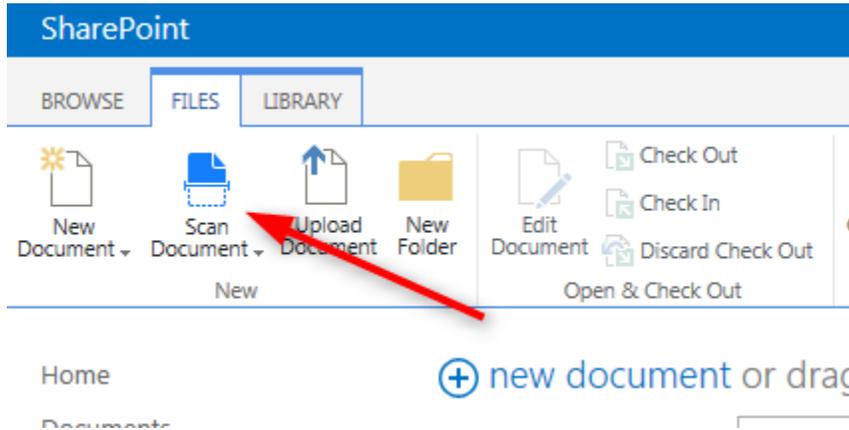
*** License for Auto-Upload Extension is required



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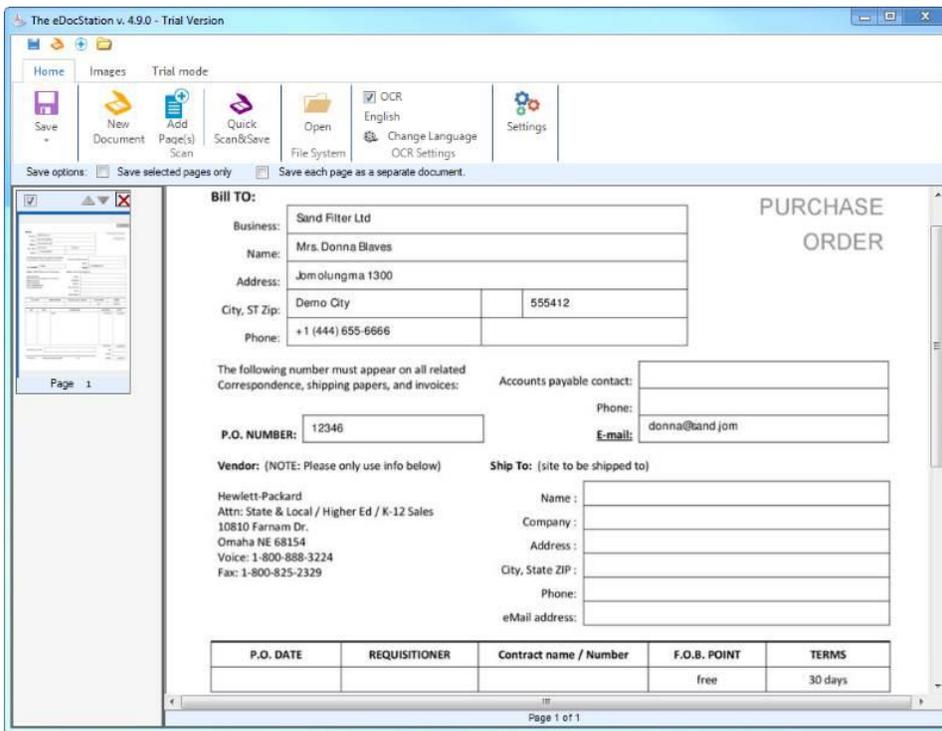
Picture 1

Scanner Plug-in has native integration with SharePoint Document Library Ribbon (Optional. You can save documents to SharePoint from the eDocStation itself)



Picture 2

SharePoint Scanner Plug-in Client - The eDocStation



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Requirements

Server Requirements

- Microsoft SharePoint Server 2013 or Microsoft SharePoint Foundation 2013

Client Software Requirements

- Windows 7 / 8 / 10
- Internet Explorer / Microsoft Edge / Chrome / Firefox
- Microsoft .NET Framework 4.0 +

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.

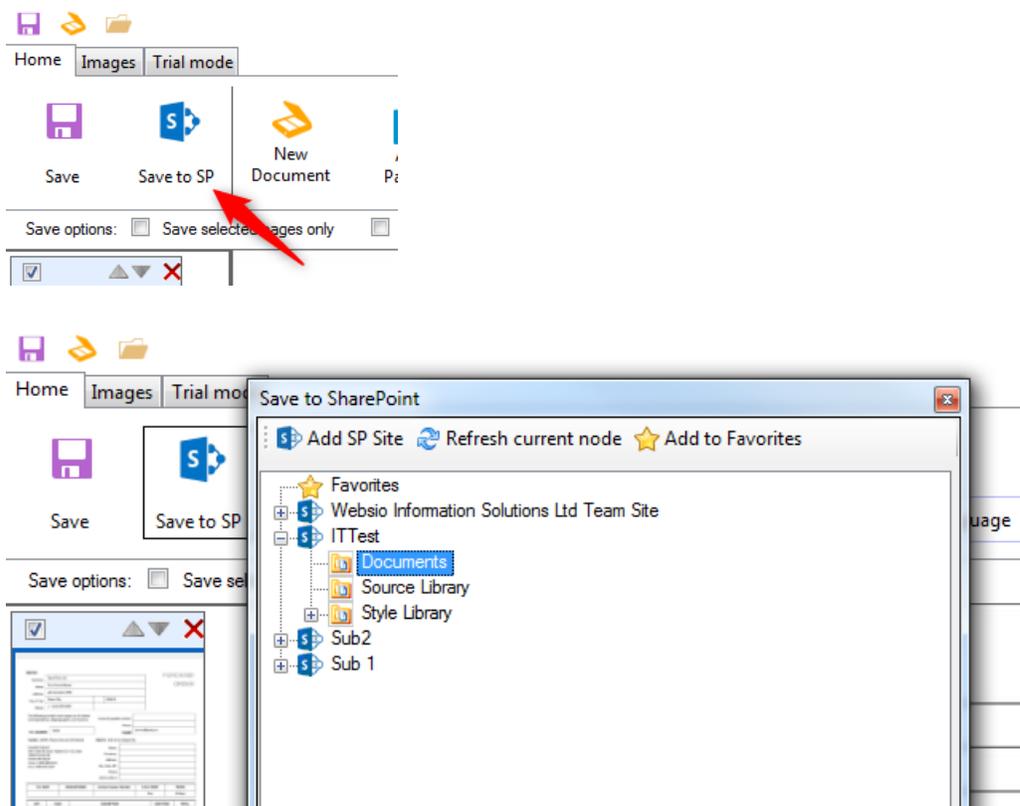
To test that your scanner is correctly defined, try to scan from one of the standard Microsoft programs like Paint or Microsoft Clip Organizer

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



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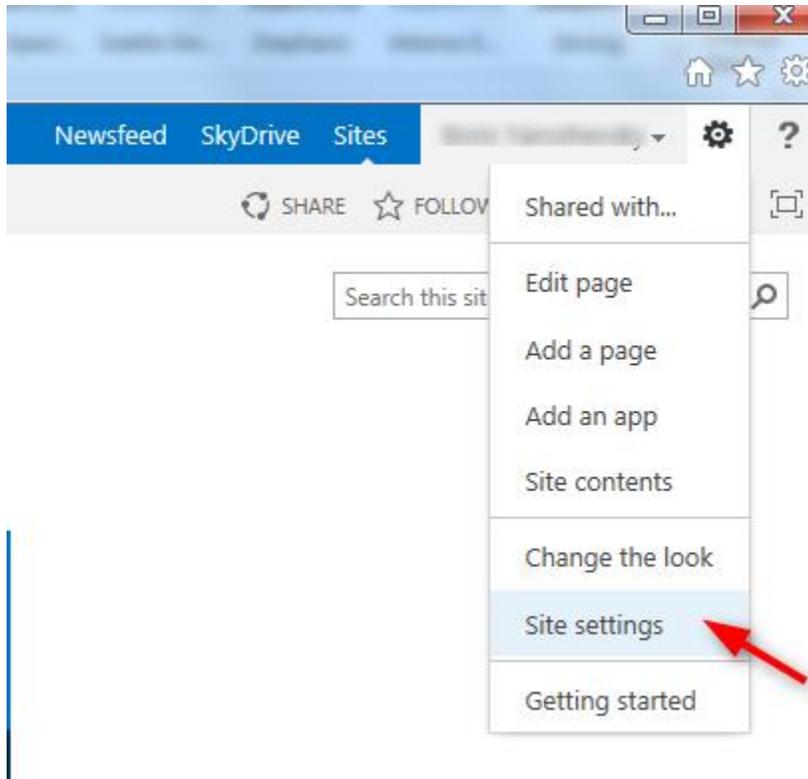
Server-side installation

3. **Important!** You must be logged on to the server by using an account that is a member of the Administrators group and SharePoint Farm Administrators
4. Unzip directory "server" from the ScannerPlugin2013Pro.zip file on your SharePoint 2013 front-end server (WFE).
5. **Important!** Right-click the "setup.exe" and choose "Run as Administrator" to begin the plug-in installation. Otherwise the error dialog box will alert you of the error that has occurred::



6. Repeat steps 1-3 on each SharePoint WFE server.
7. After installation is complete, open top-level site of the site collection where you will use the Plug-in.

8. Open "Site actions" menu and select option "Site Settings"



9. Select option "Site collection features"

- Site Collection Administration
 - Recycle bin
 - Search Result Sources
 - Search Result Types
 - Search Query Rules
 - Search Schema
 - Search Settings
 - Search Configuration Import
 - Search Configuration Export
 - Site collection features
 - Site hierarchy
 - Site collection audit settings
 - Audit log reports
 - Portal site connection

A red arrow points to the 'Site collection features' option.

10. In the list of installed features find "Websio Scanner Plug-in 2013 Professional" and click "Activate".



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| | | | |
|---|--|------------|--------|
|  | SharePoint Server Standard Site Collection features Features such as user profiles and search, included in the SharePoint Server Standard License. | Deactivate | Active |
|  | Site Policy Allows site collection administrators to define retention schedules that apply to a site and all its content. | Deactivate | Active |
|  | Three-state workflow Use this workflow to track items in a list. | Deactivate | Active |
|  | Video and Rich Media Provides libraries, content types, and web parts for storing, managing, and viewing rich media assets, like images, sound clips, and videos. | Deactivate | Active |
|  | Websio Scanner Plug-in 2013 Professional | Activate | |
|  | Workflows Aggregated set of out-of-box workflow features provided by SharePoint. | Activate | |

Special case: If your SharePoint Server uses Forms Authentication, see section "[Special Settings](#)".

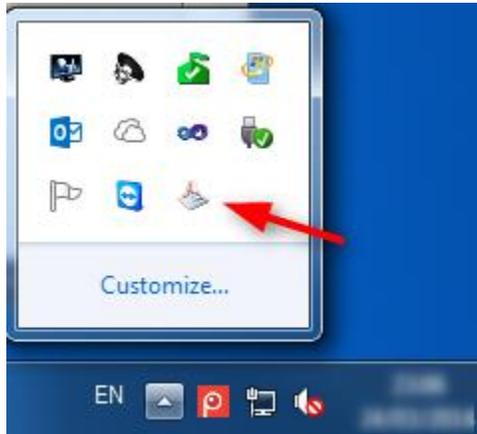
Client-side installation

1. Unzip directory "eDocStation" from the ScannerPlugin2013Pro.zip file on your client machine
2. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the installation.
3. **Please pay attention!** SharePoint 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://websio.com/ocrlangpacks.aspx> 
4. Windows Firewall alert may appear during installation. Approve network access for eDocLoader.exe. The eDocLoader does not access any external internet resource. It is responsible for communication with SharePoint only.

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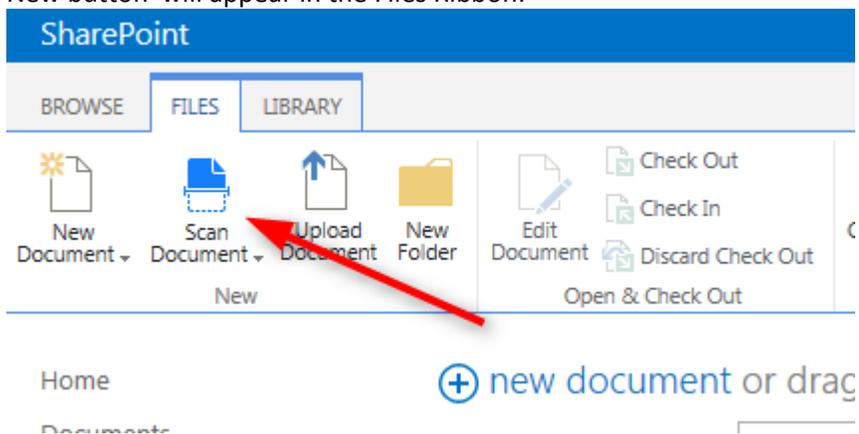
When the installation has been completed successfully:

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



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

2. New button will appear in the Files Ribbon:

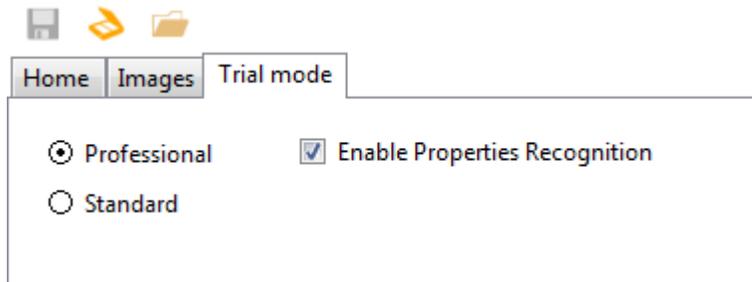




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Trial version

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

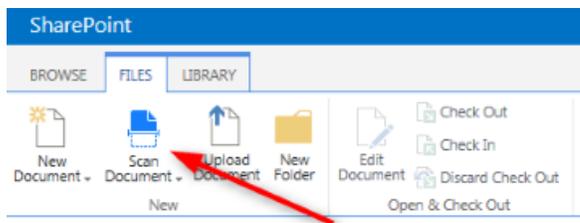


How to use

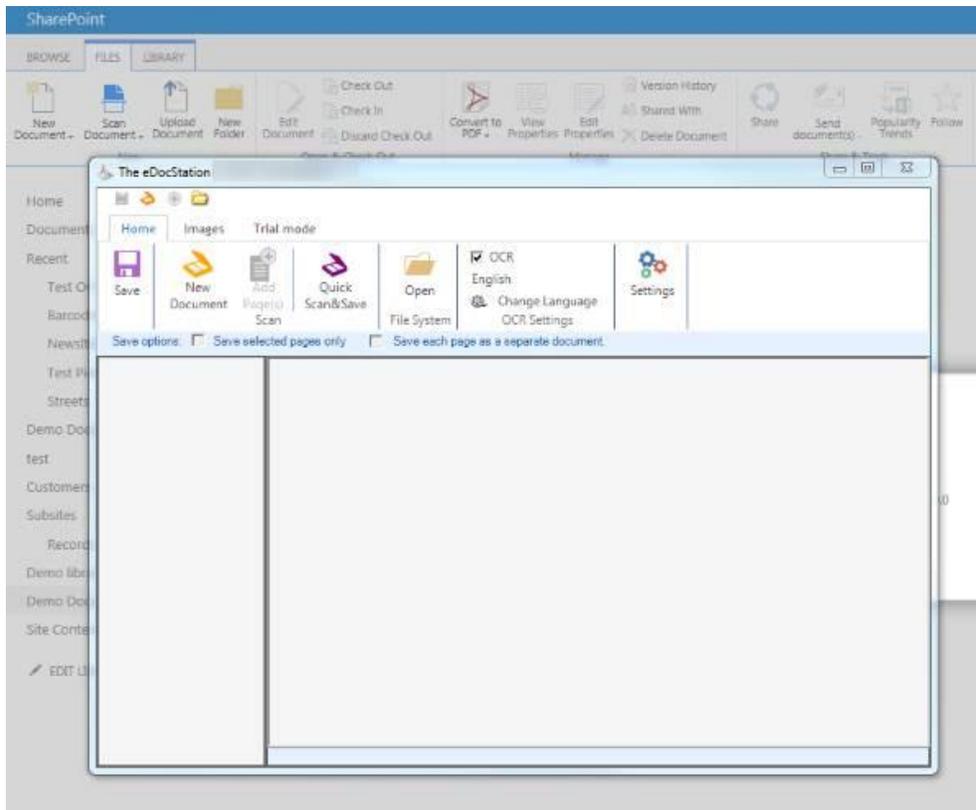
Option 1. Start process from SharePoint

Regular Mode

1. Open document library view, select tab "Files" and click on the button "Scan Document"

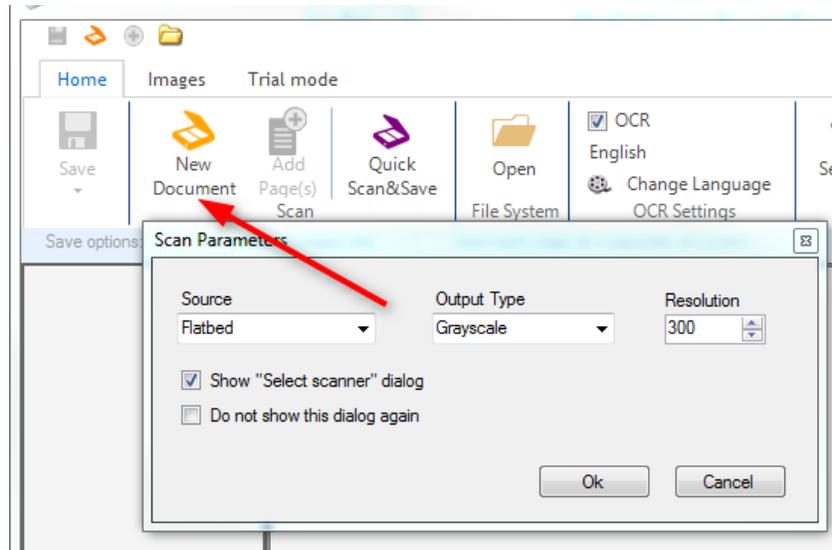


The eDocStation will be opened in the SharePoint mode.

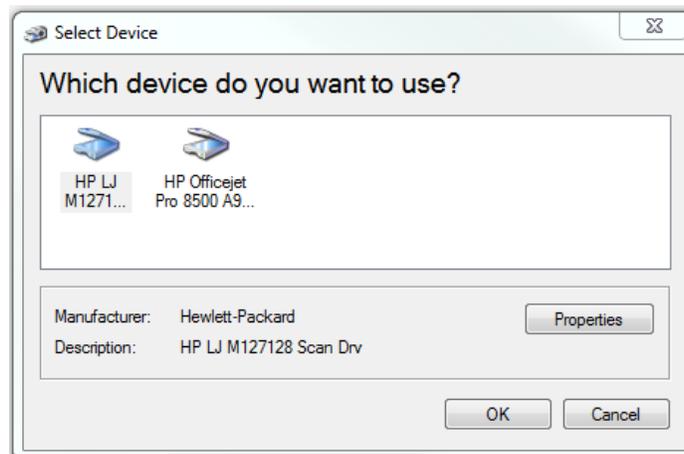


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1. Click on the "New Document" and select scan parameters



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. Click "OK" and complete scan process.



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4. Scanned pages:

The screenshot displays the Websio software interface. The top menu bar includes 'Home', 'Images', and 'Trial mode'. Below this is a toolbar with icons for 'Save', 'New Document', 'Add Page(s) Scan', 'Quick Scan & Save', 'Open', 'OCR: English', 'Change Language', and 'OCR Settings'. A 'Settings' icon is also present. Below the toolbar, there are 'Save options' with checkboxes for 'Save selected pages only' and 'Save each page as a separate document'. The main area shows a scanned document titled 'PURCHASE ORDER'. The document contains the following information:

Bill TO:

Business: Sand Filter Ltd
Name: Mrs. Donna Blaves
Address: Jomolungma 1300
City, ST Zip: Demo Qty 555412
Phone: +1 (444) 655-6666

The following number must appear on all related Correspondence, shipping papers, and invoices:

P.O. NUMBER: 12346

Accounts payable contact:
Phone:
E-mail: donna@rand.jom

Vendor: (NOTE: Please only use info below)
Hewlett-Packard
Attn: State & Local / Higher Ed / K-12 Sales
10810 Farnam Dr.
Omaha NE 68154
Voice: 1-800-888-3224
Fax: 1-800-825-2329

Ship To: (site to be shipped to)
Name:
Company:
Address:
City, State ZIP:
Phone:
eMail address:

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

Page 1 of 2

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

The screenshot shows a 'Save to SharePoint' dialog box. It has a title bar with a close button. Inside the dialog, there is a 'Name:' label followed by a text input field. To the right of the input field is a dropdown menu currently set to 'PDF'. Below the input field and dropdown are 'OK' and 'Cancel' buttons.

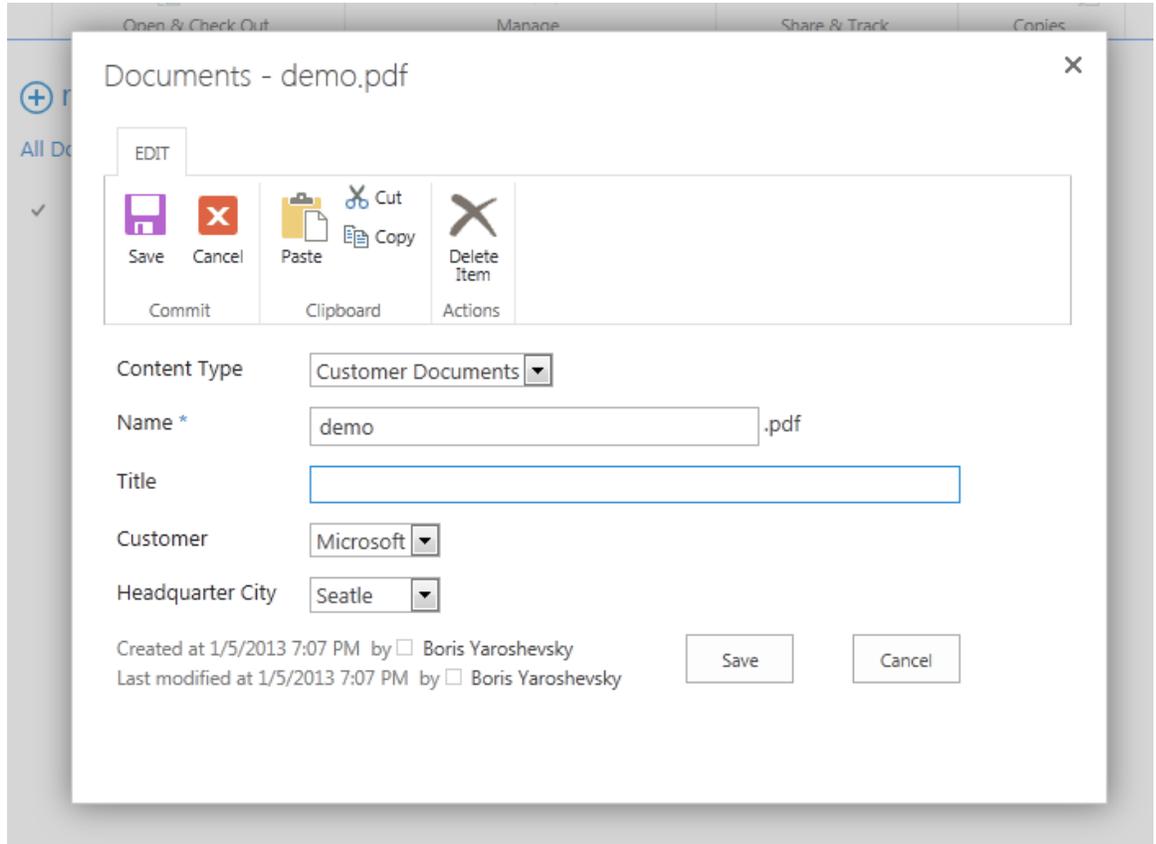
Select option "Always use auto name" in the eDocStation settings to avoid this step.

6. Press "OK".



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- Standard SharePoint properties window will be displayed if document profile contains required properties.

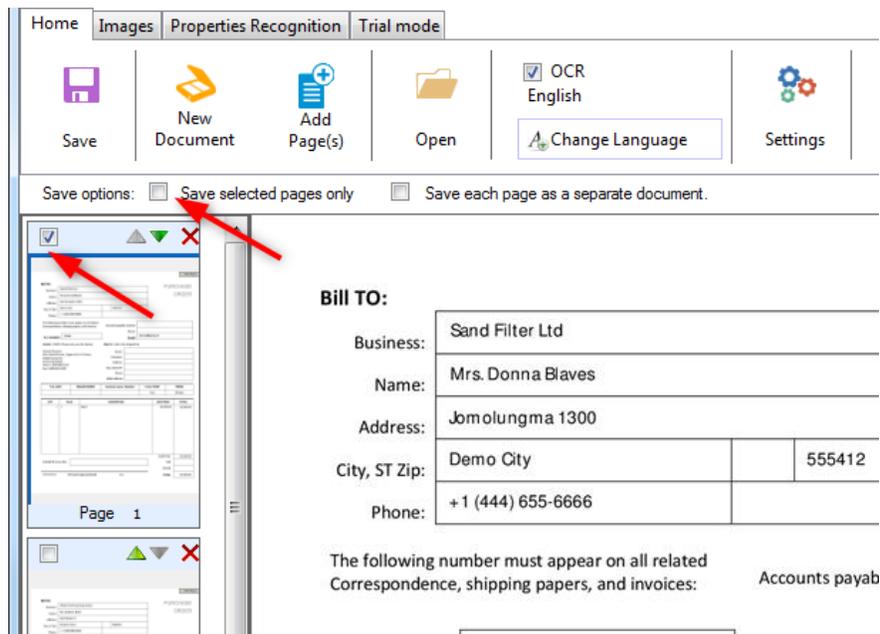




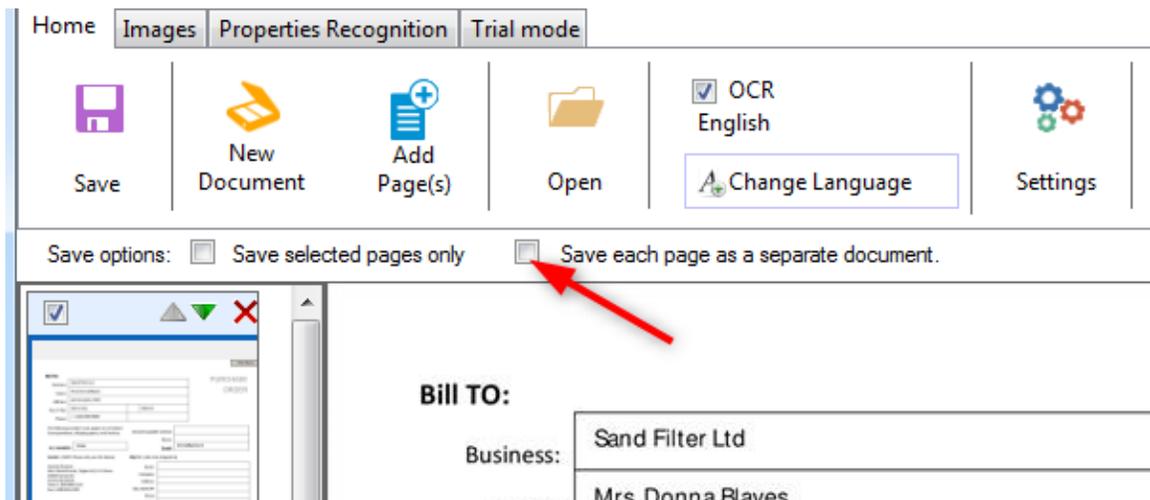
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Additional save options:

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:

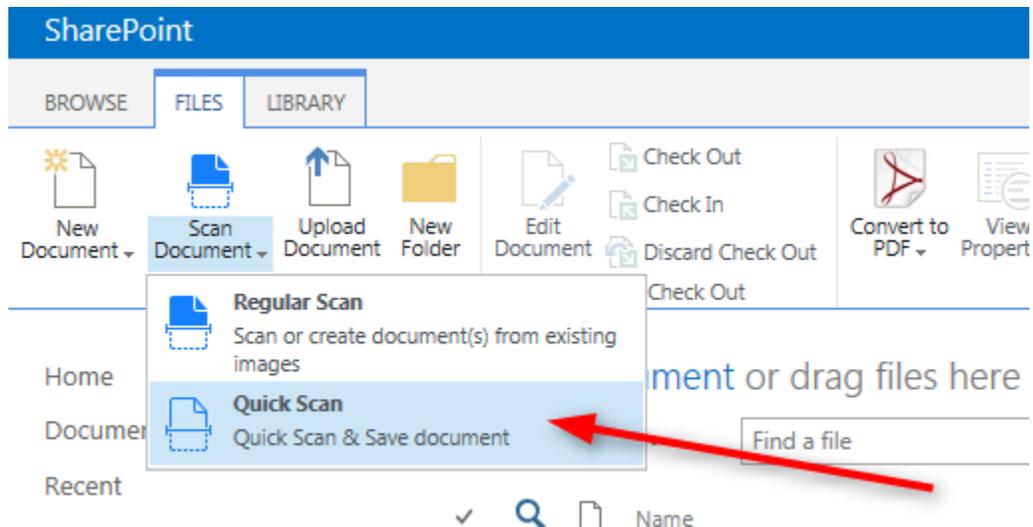


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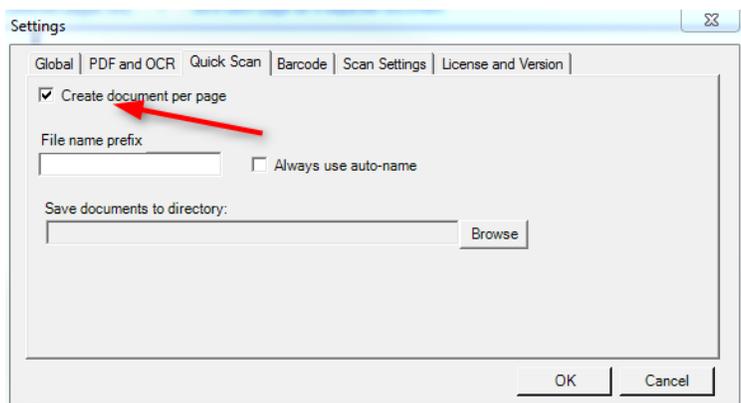
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Quick Scan Mode

1. Select option "Quick Scan" from the drop-down menu.

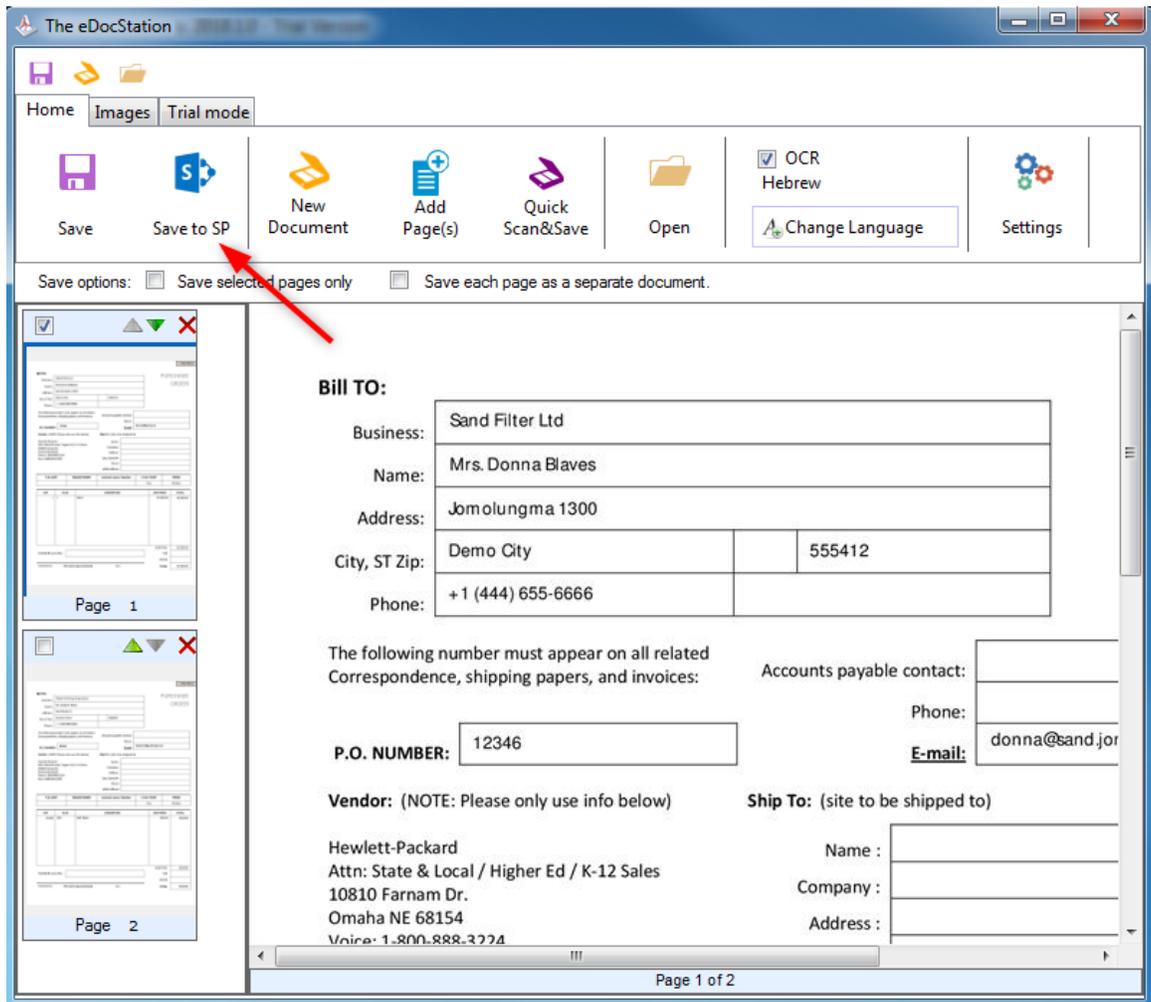


2. New document(s) will be scanned and saved automatically. The eDocStation window will not be displayed.
3. Document names will be generated automatically using prefix defined in the Quick Scan settings (see paragraph "Settings").
4. To save each page as a separate document in the Quick Scan mode, select option "Create document per page" in the eDocStation Quick Scan settings

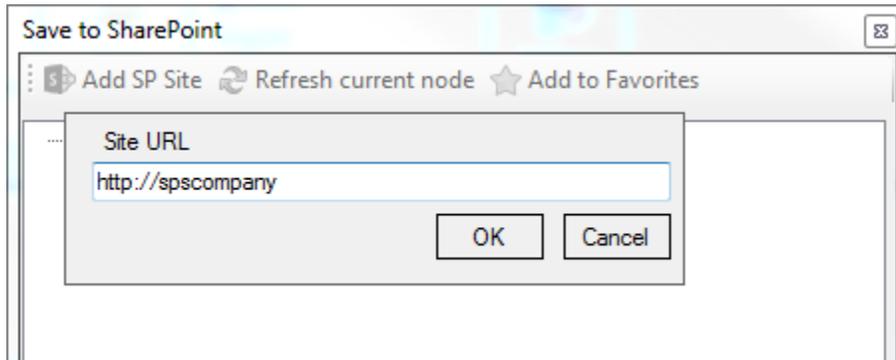


Option 2. Use the eDocStation as a standalone-application

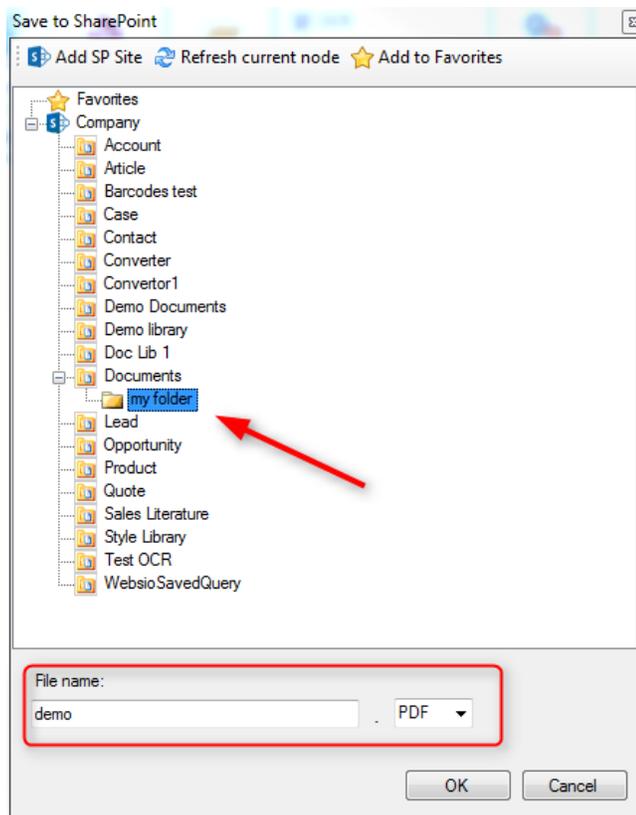
1. Use desktop shortcut  in order to launch the eDocStation. Scan or compose document as described in the previous section "[Option 1. Start process from SharePoint](#)"
2. Press on "Save to SP"



3. "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

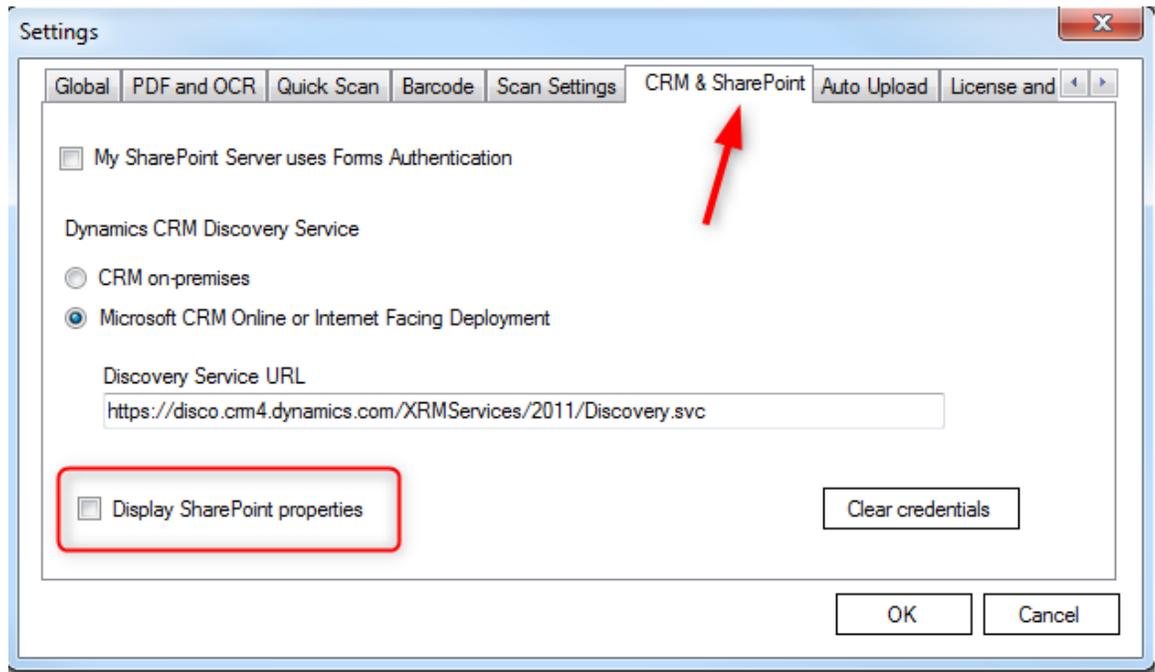


See section [“Save to SharePoint Dialog”](#) for additional information



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



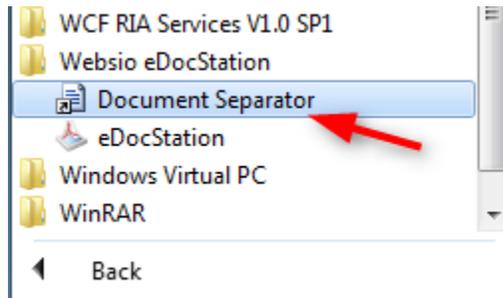


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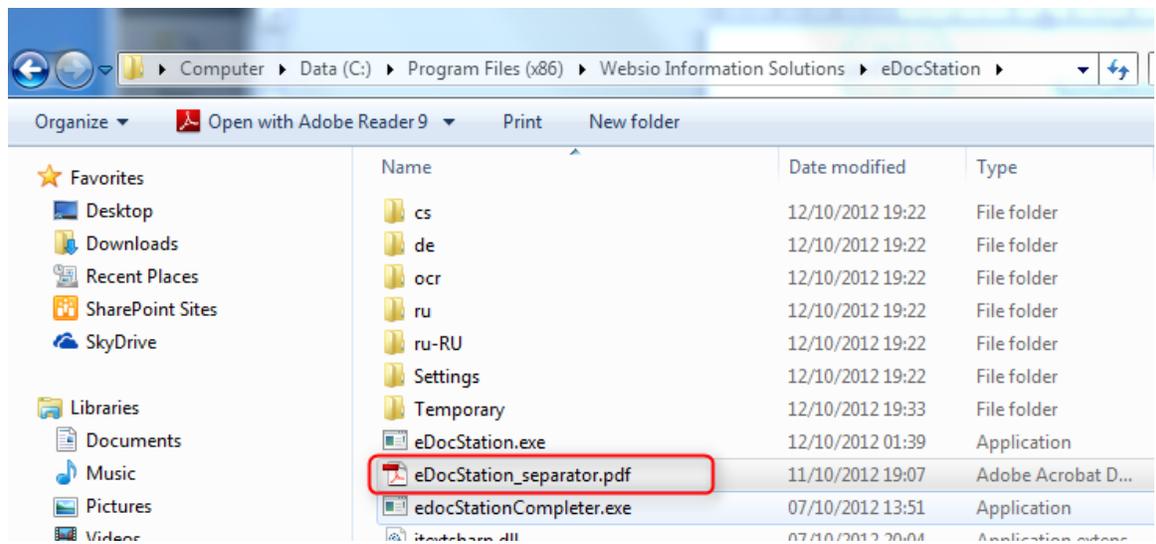
Document Separator Sheets

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

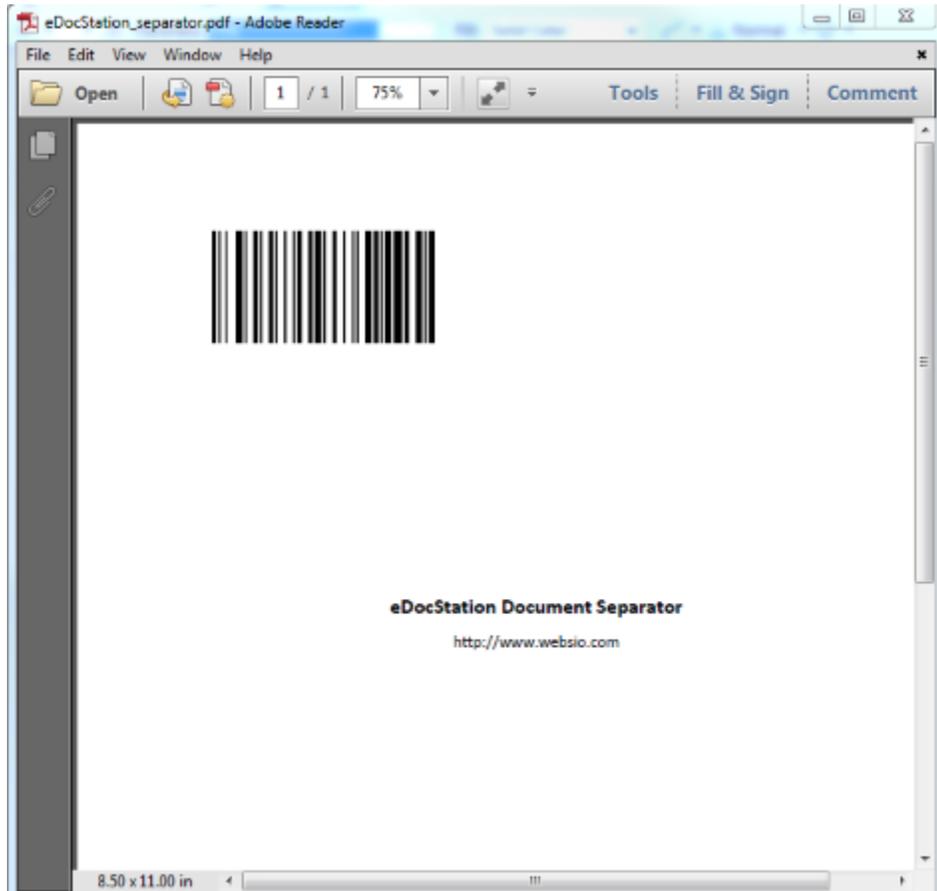


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- b. Print Separator Sheet in A4 format in a high quality.
3. Separate documents in the scanner feeder by previously printed sheets
4. Scan documents using SharePoint Scanner Plug-in. Quick Scan mode is recommended but not required.

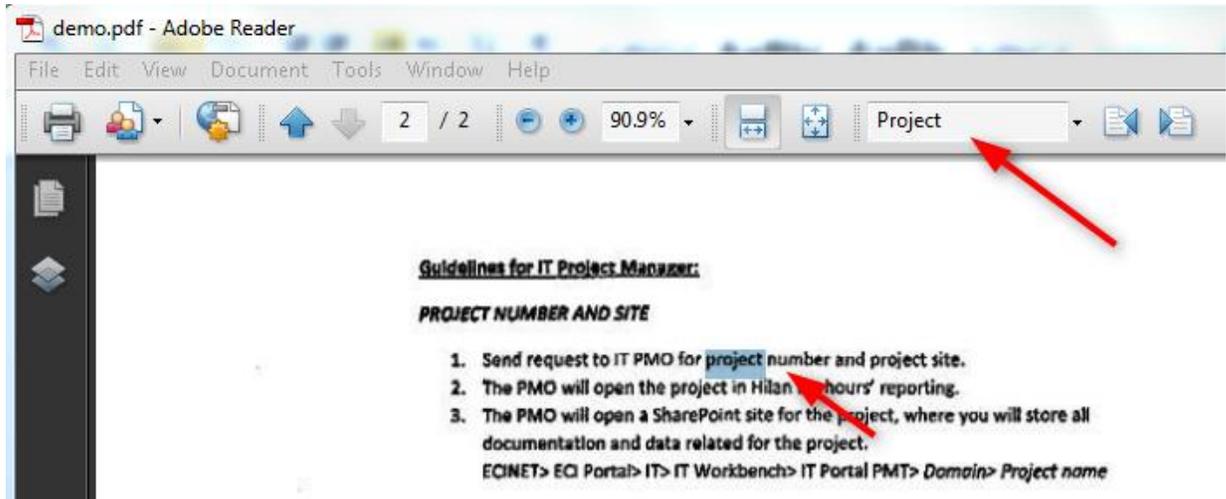


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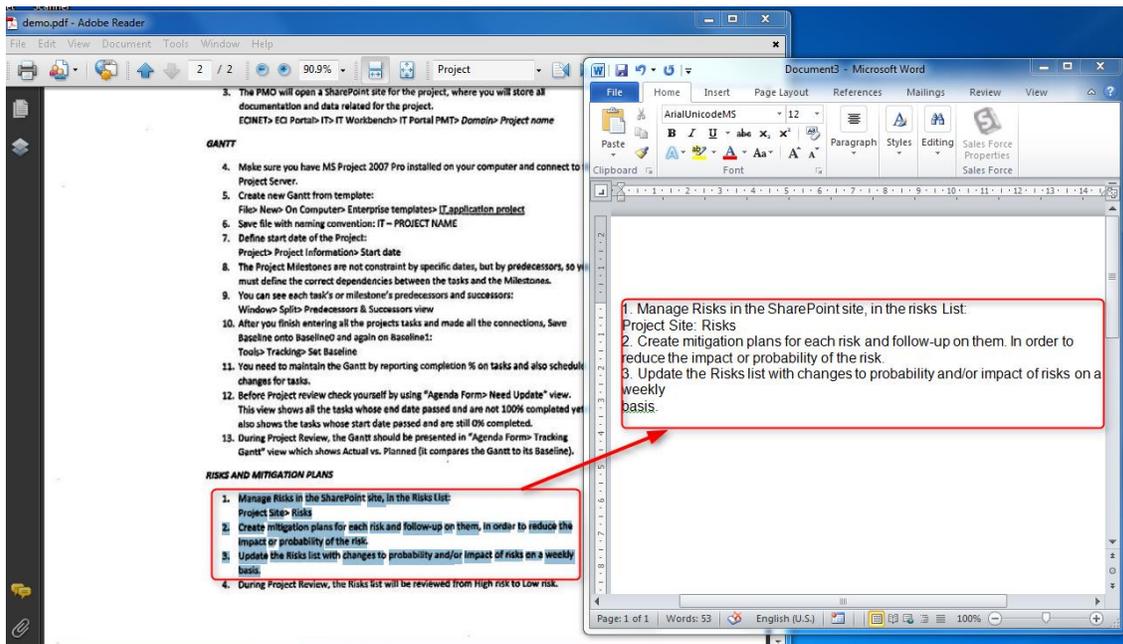
OCR – convert images to searchable PDF

Searchable PDF (document created using OCR process) advantages:

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



- Copy text from the document:



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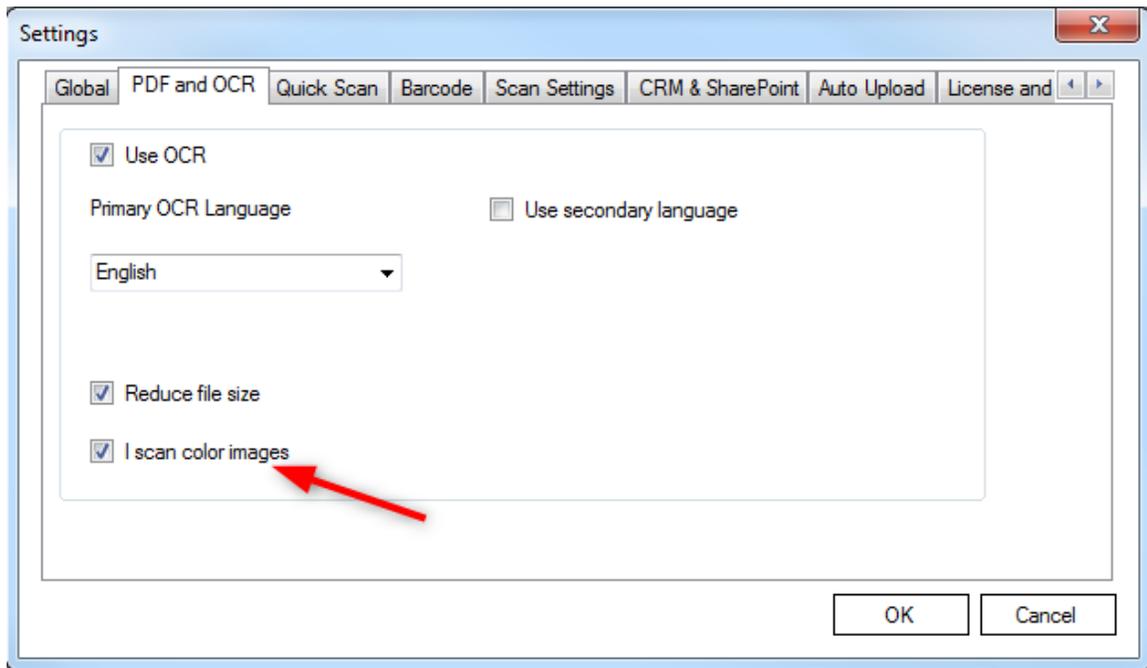
<http://www.websio.com> sales: sales@websio.com support: support@websio.com



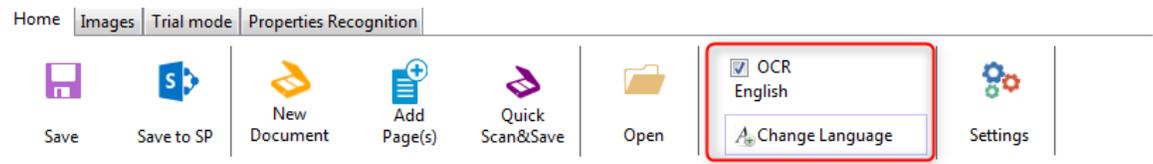
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The best OCR (text recognition) quality can be reached for images scanned in grayscale with 300 dpi resolution.

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



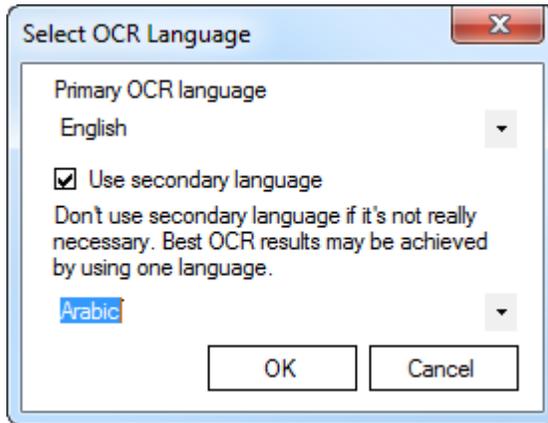
1. Select checkbox "OCR" and document languages to create searchable document.



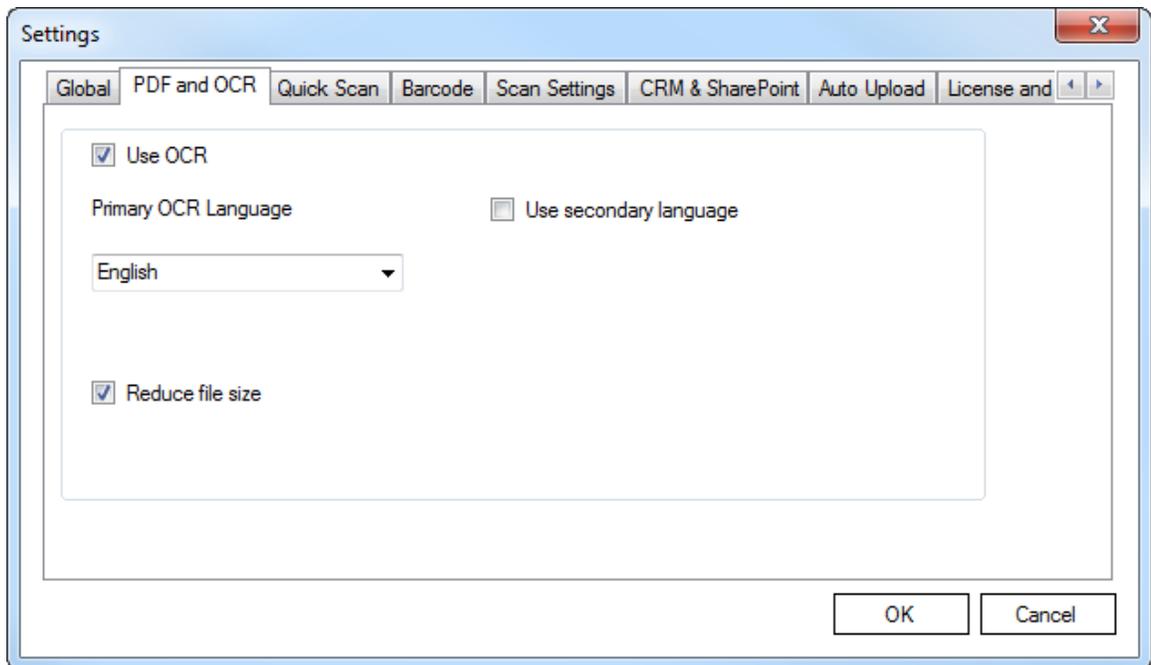
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.



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Set default OCR parameters using eDocStation settings:



Important! SharePoint Scan, PDF and OCR Add-in *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.



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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

License for Zonal OCR Extension is required

This feature enables automatic properties recognition and assignment.

Demo videos:

1. [Part 1 – Overview.](#)
2. [Part 2 - Templates](#)

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 |

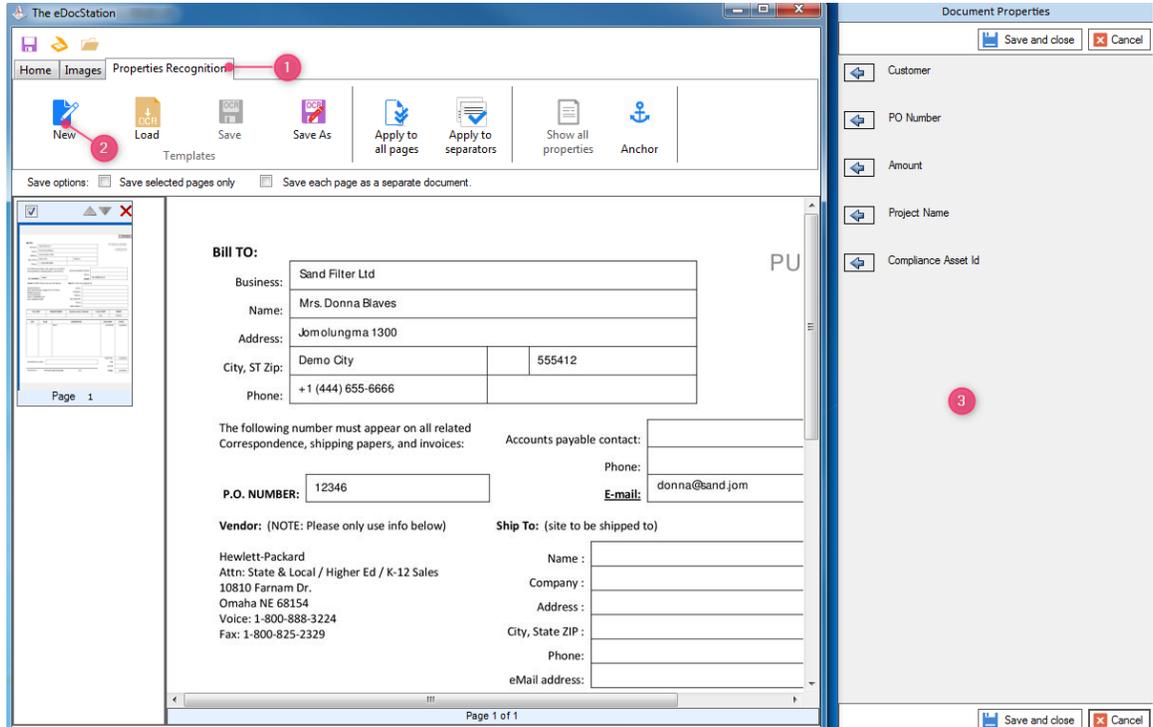
Important! Zonal OCR supports text, number and currency field types only.



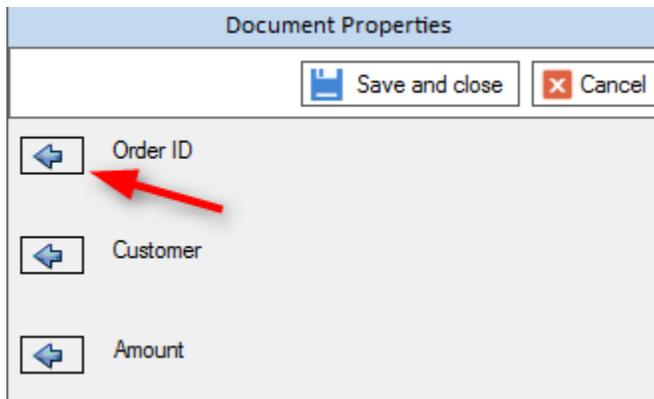
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Example 1. Manual recognition

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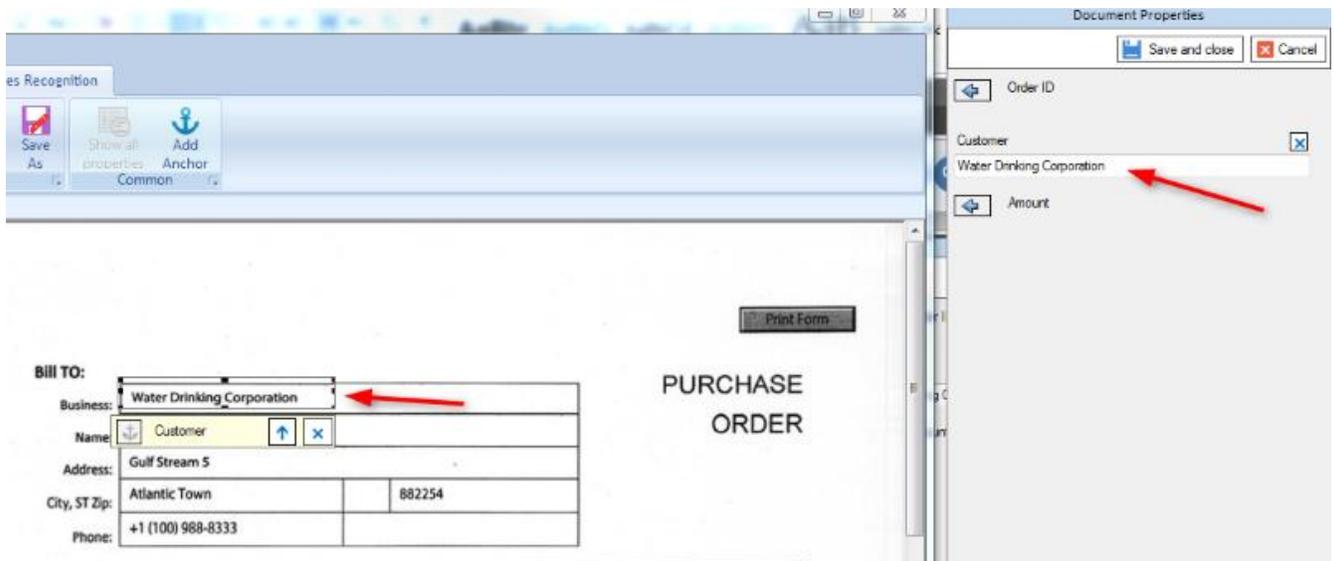
3. Drag and resize property placeholder to fit actual text on the picture



The image shows a form with a 'Bill TO:' section. A yellow 'Customer' property placeholder with an anchor icon, an up arrow, and a close button is being dragged by a red arrow towards the 'Business' field. The form fields are as follows:

| | | |
|---------------|----------------------------|--------|
| 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.

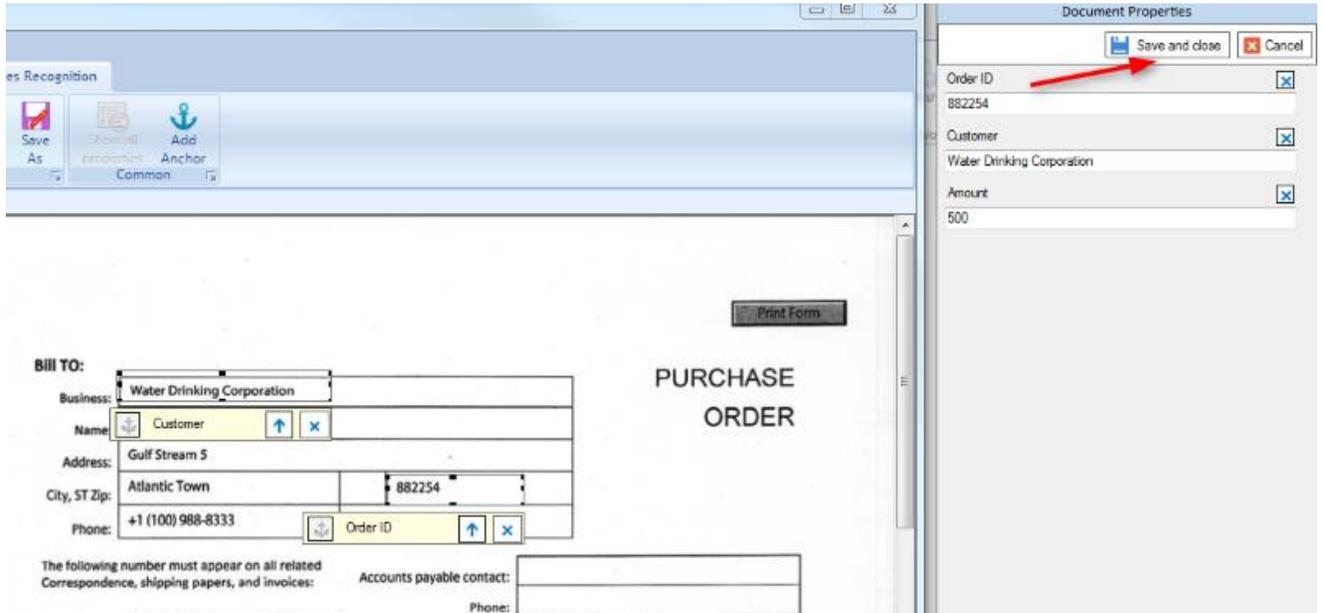


The image shows a software interface with a 'Document Properties' pane on the right. The pane lists properties: Order ID, Customer, Water Drinking Corporation, and Amount. A red arrow points to 'Water Drinking Corporation' under the 'Customer' property. Below the pane is a 'Bill TO:' form with a 'Business:' field containing 'Water Drinking Corporation', also indicated by a red arrow. A 'PURCHASE ORDER' label is visible to the right of the form.

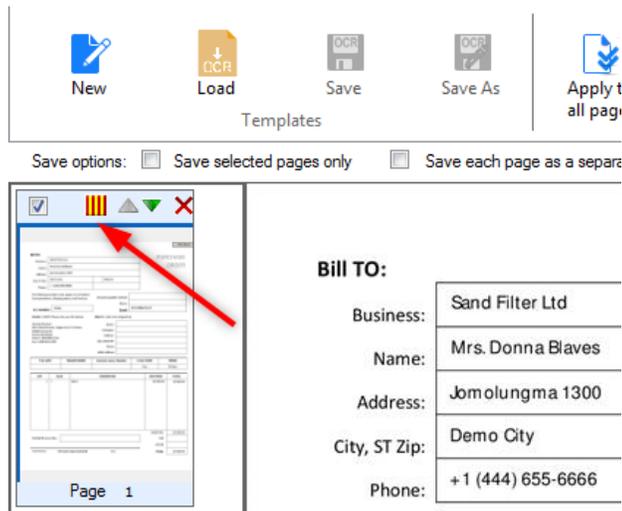


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5. Add and position other properties. Click “Save and close”

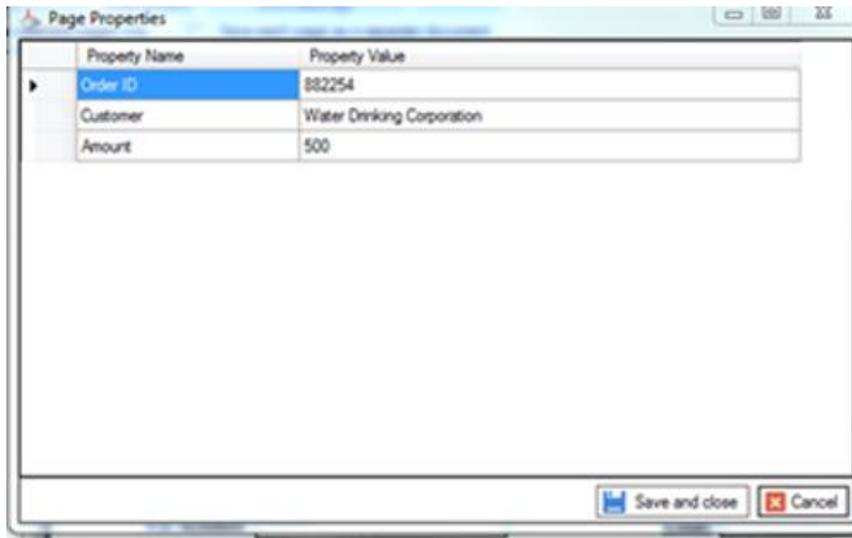


6. You'll see a new button on the page thumbnail:

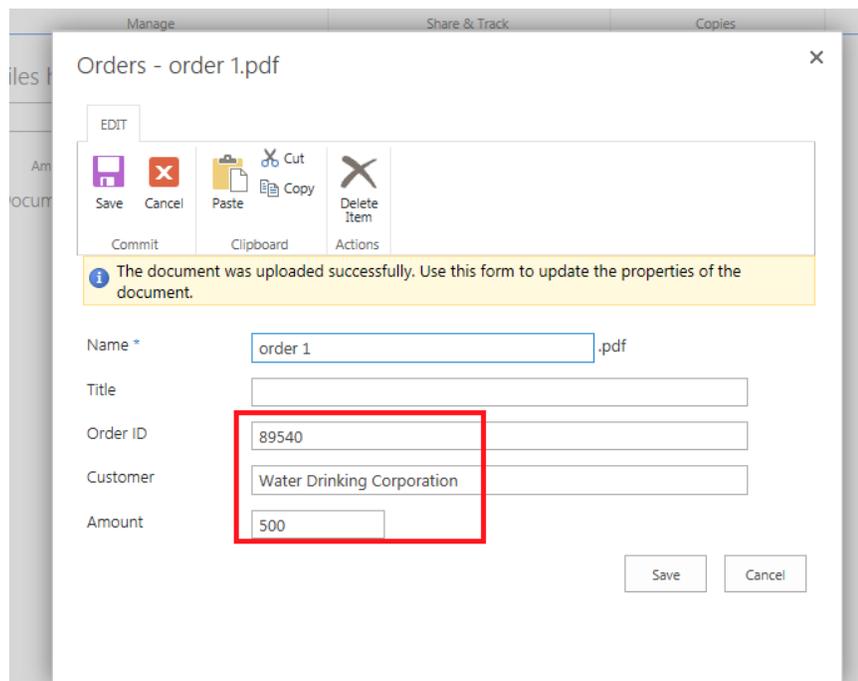


7. Use this button to review and edit page properties values

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8. Save document. Result:



Orders - order 1.pdf

EDIT

Save Cancel Paste Copy Cut Delete Item

Commit Clipboard Actions

The document was uploaded successfully. Use this form to update the properties of the document.

Name * order 1 .pdf

Title

Order ID 89540

Customer Water Drinking Corporation

Amount 500

Save Cancel

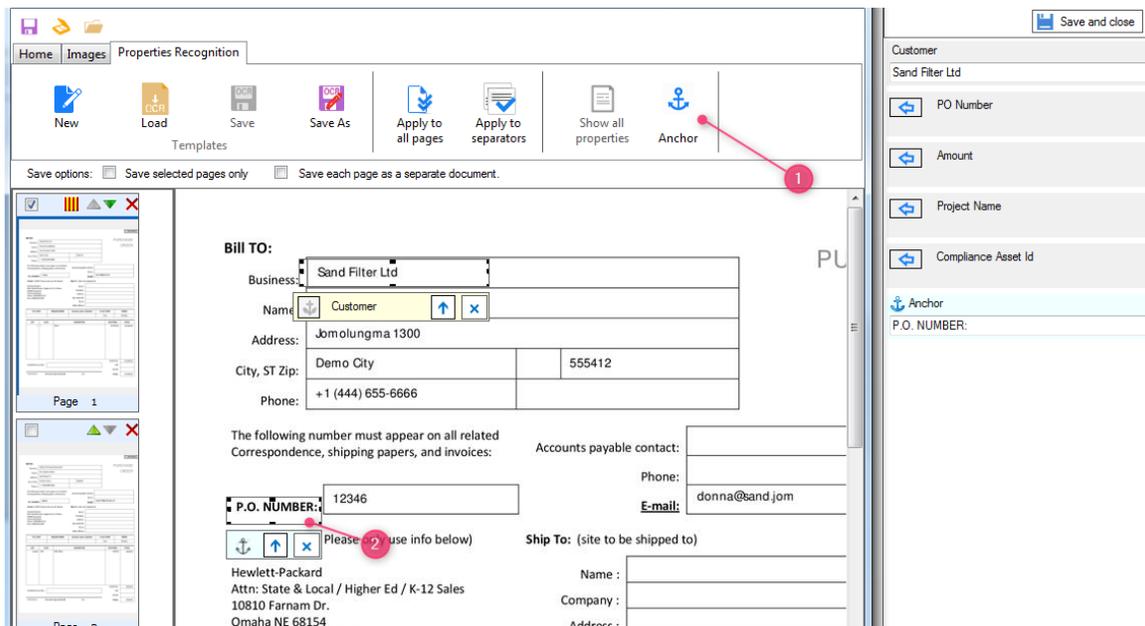


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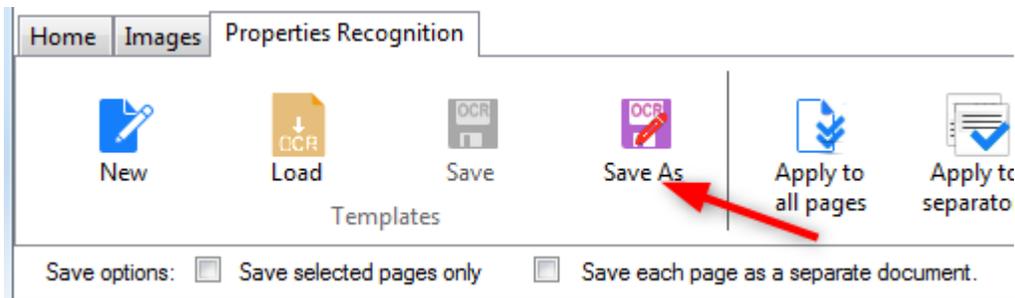
Example 2. Templates

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 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.

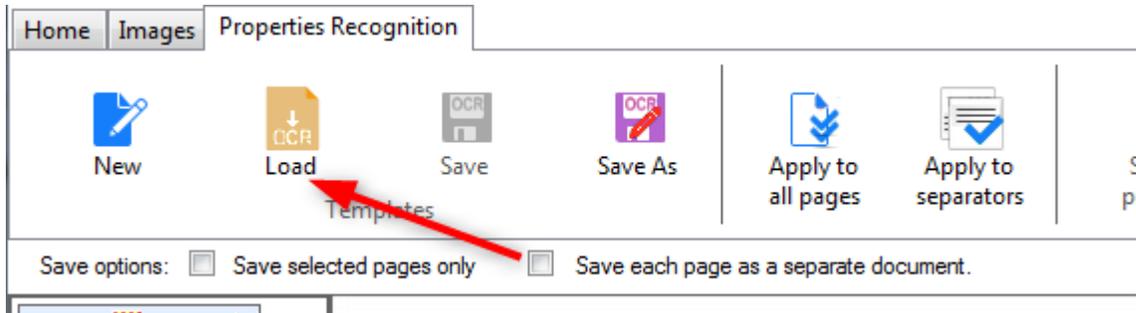


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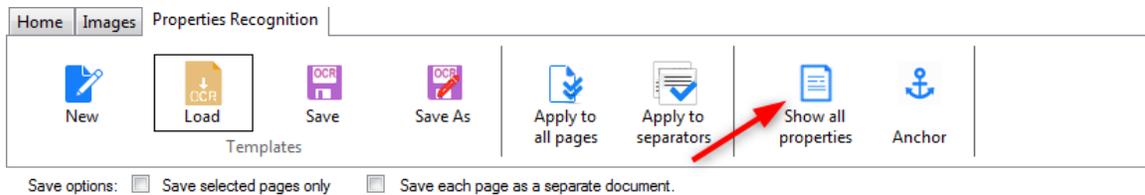
How to use previously saved template

1. Scan or load the image you have previously saved
2. Press on the button “Load” (1) or use one of recently used templates (2)
3. Select template



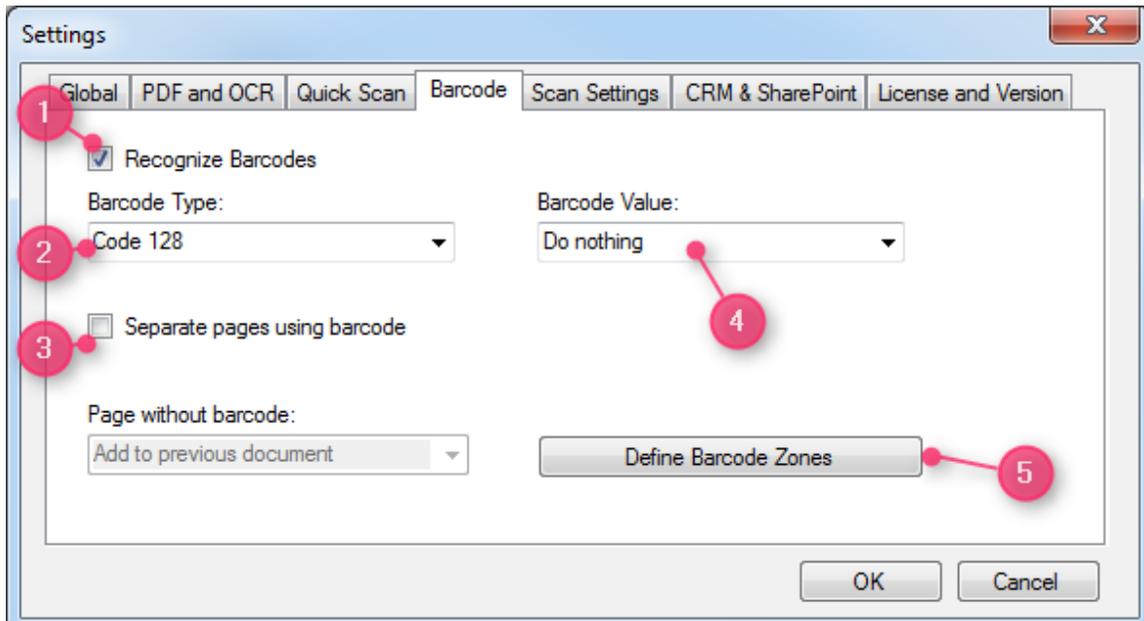
The template will be loaded and placeholders will be positioned automatically. Adjust placeholders positions and/or edit properties values if necessary.

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”



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. This eliminates the need to scan each document separately.

Select checkbox (2) 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



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Barcode Value:

You 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”:

Websio Set ✓

- Add from existing site content types
- Change new button order and default content type

Columns

A column stores information about each document in the document library. Because this c information is required or optional for a column, are now specified by the content type of

| Column (click to edit) | Type |
|------------------------|------------------------|
| Created | Date and Time |
| Description | Multiple lines of text |
| Document Barcode | Single line of text |
| Modified | Date and Time |
| Title | Single line of text |
| Created By | Person or Group |

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.

Settings

Global PDF and OCR Quick Scan Barcode Scan Settings CRM & SharePoint Auto Upload License and

Recognize Barcodes

Barcode Type: QR Code

Barcode Value: Save to property (3)

Separate pages using barcode

Property Name: PO Number (6)

Page without barcode: Add to previous document

Define Barcode Zones

OK Cancel

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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 SharePoint 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 + new document or drag files here

Documents All Documents Find a file

| ✓ | 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

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:

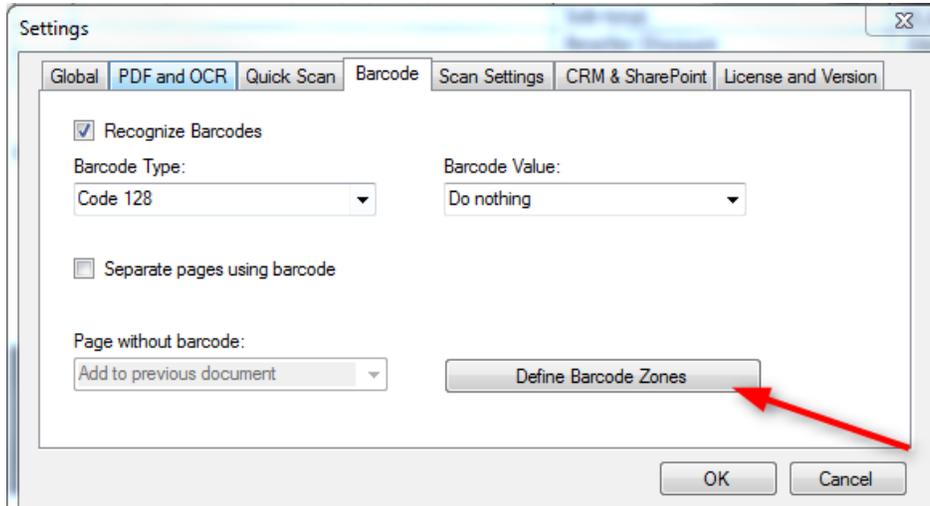
1. The license is domain-based (for unlimited number of SharePoi domain).
2. Trial-version activator will be sent by e-mail in two working day and approved.

value 1

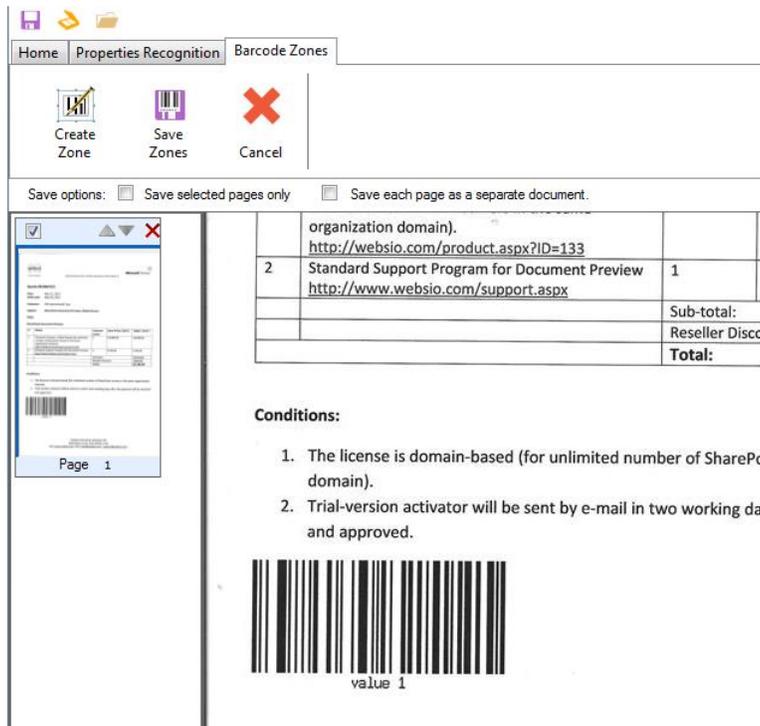


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2. Go to Settings -> Barcode and click on the "Define barcode zones"



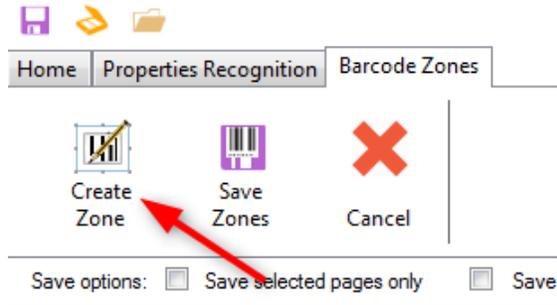
3. New tab "Zones" will be displayed. Existing zones will be shown on the image surface.



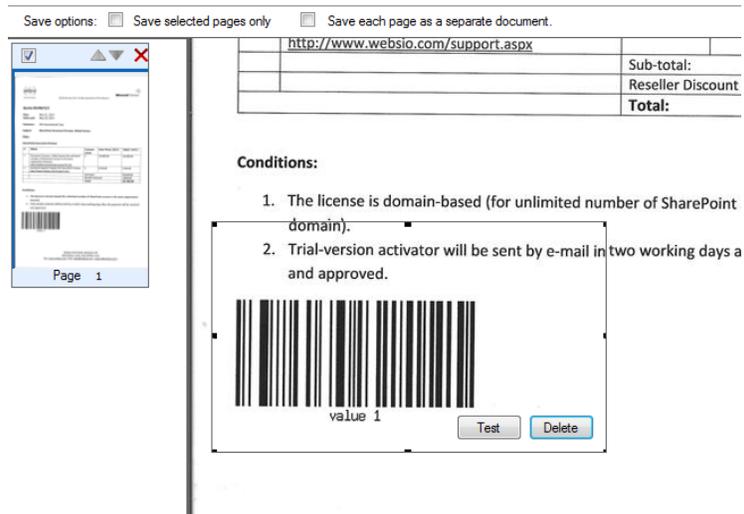
4. Create new zone:

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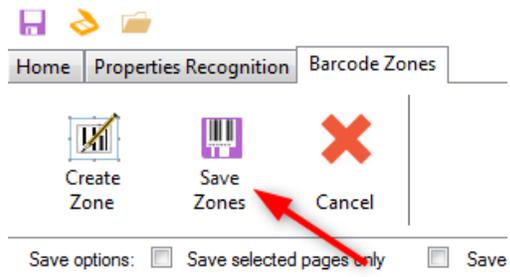
- Click on the button "Create Zone"



- 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.

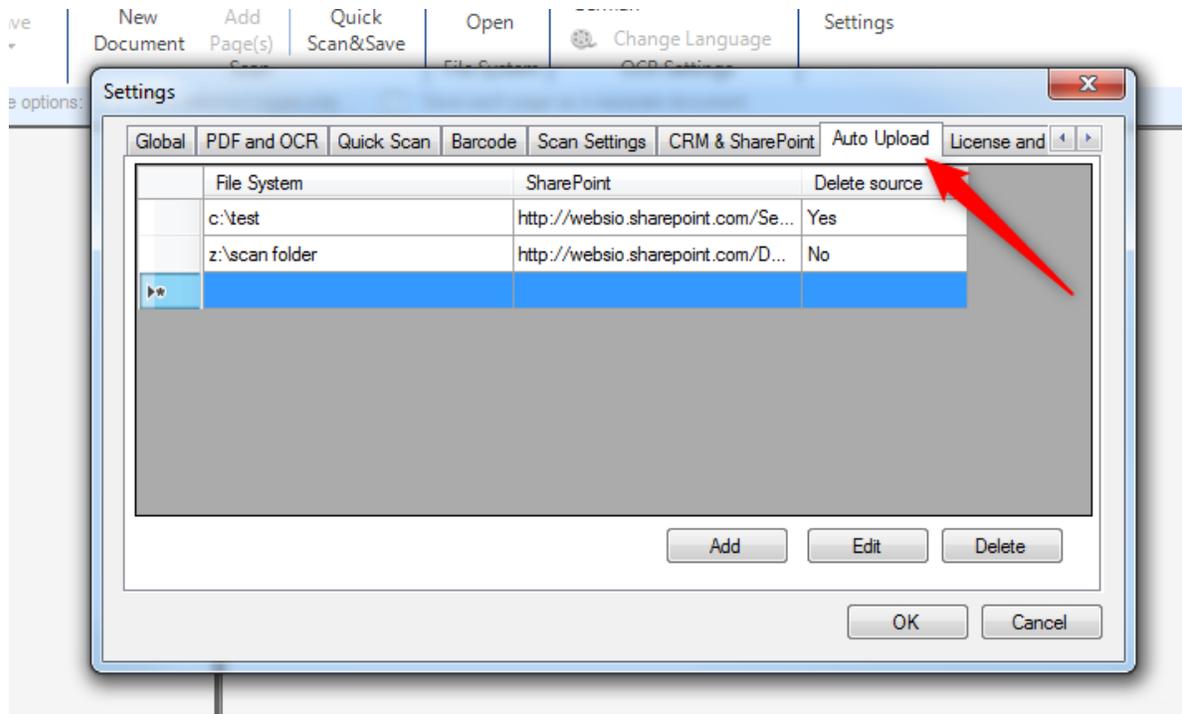
Auto-upload processes documents according to file type and content:

| # | 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 |

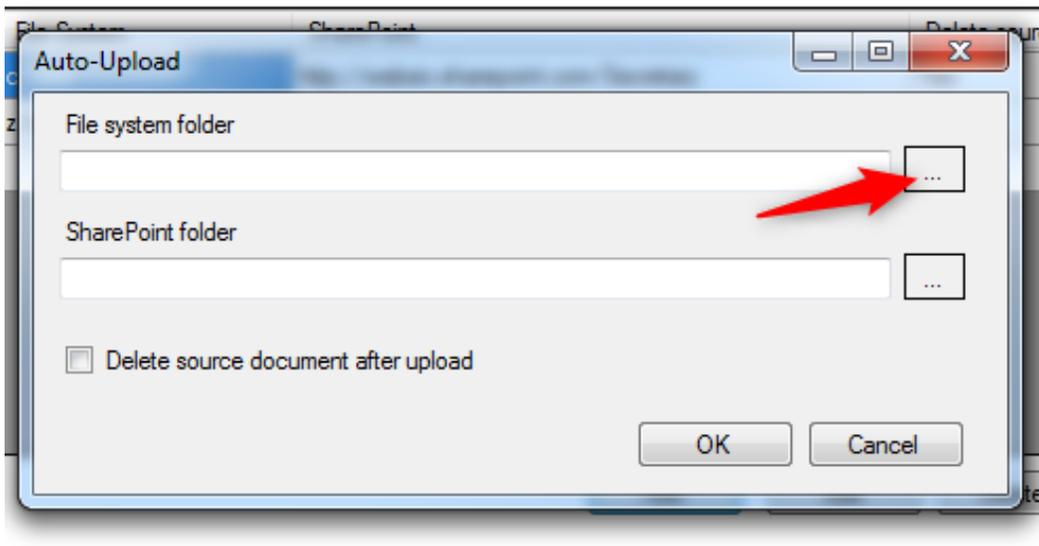
Important!

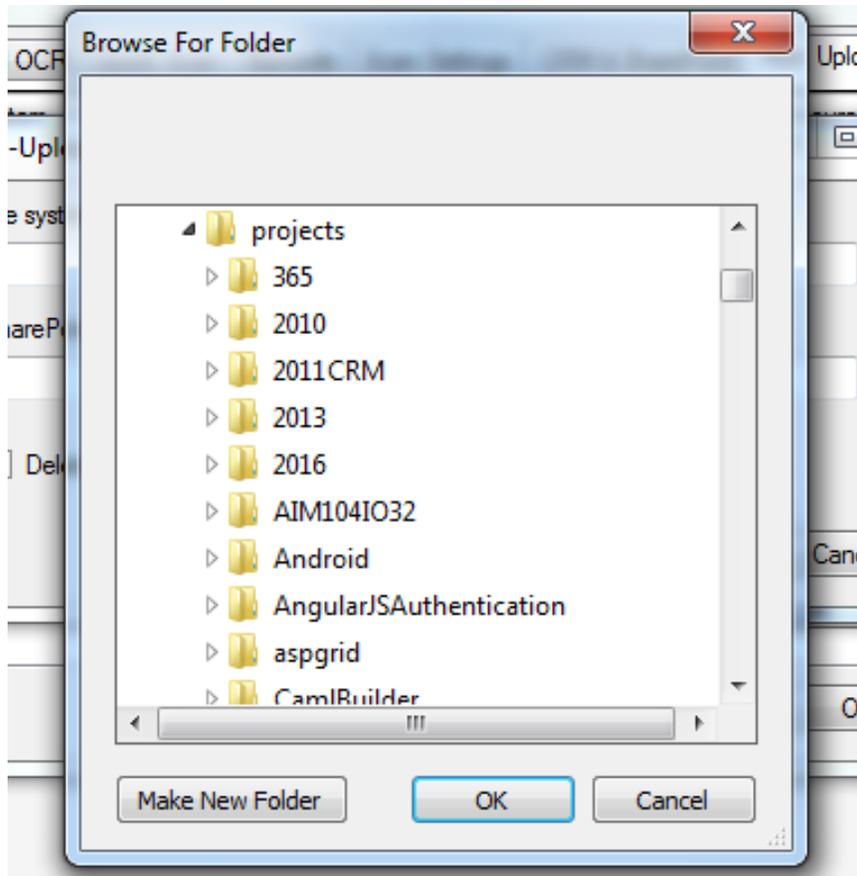
The Listener is not covered by SharePoint Scan, PDF and OCR Add-in license and requires special license. Write to sales@websio.com for price proposal.

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

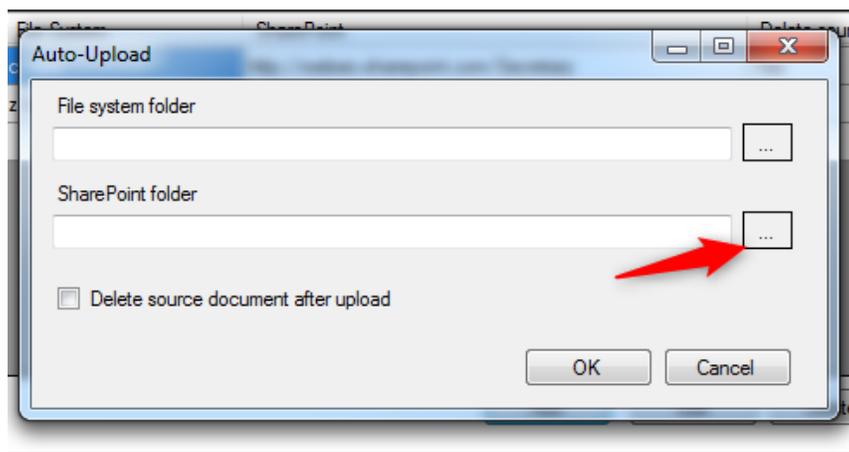


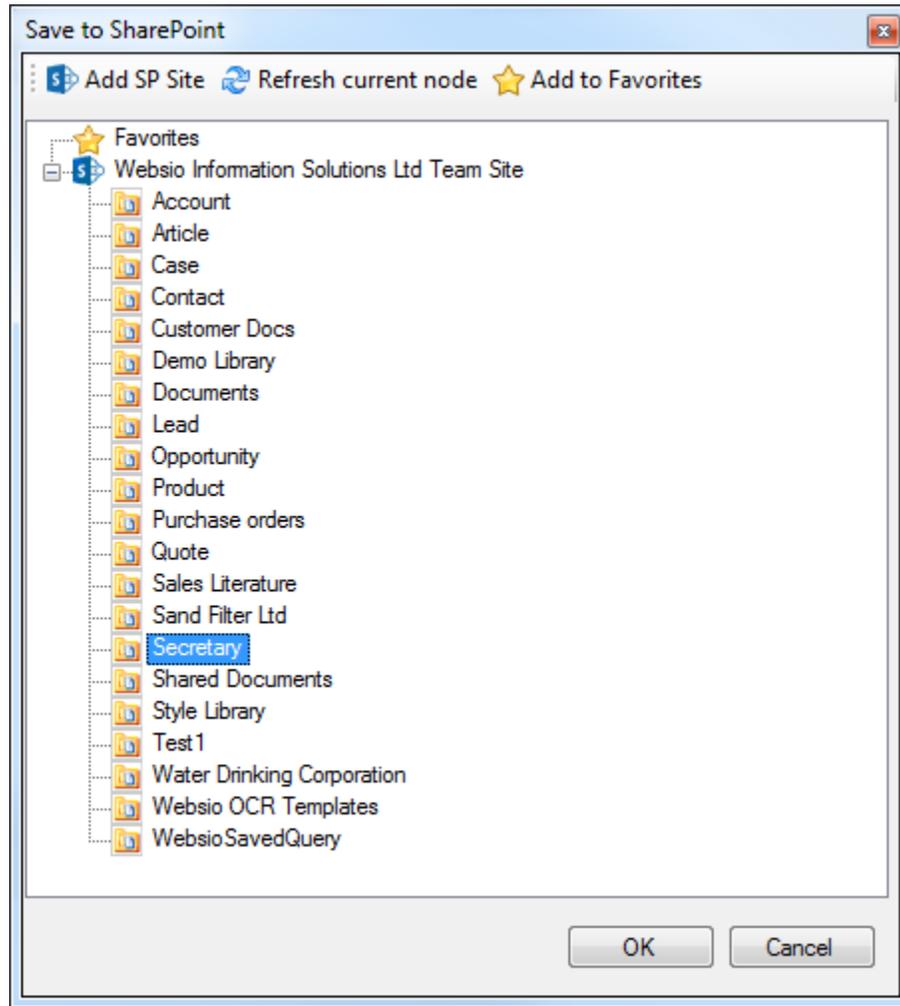
2. Click on the “Add” to define new pair “File System Folder → SharePoint Folder”
3. Select source directory



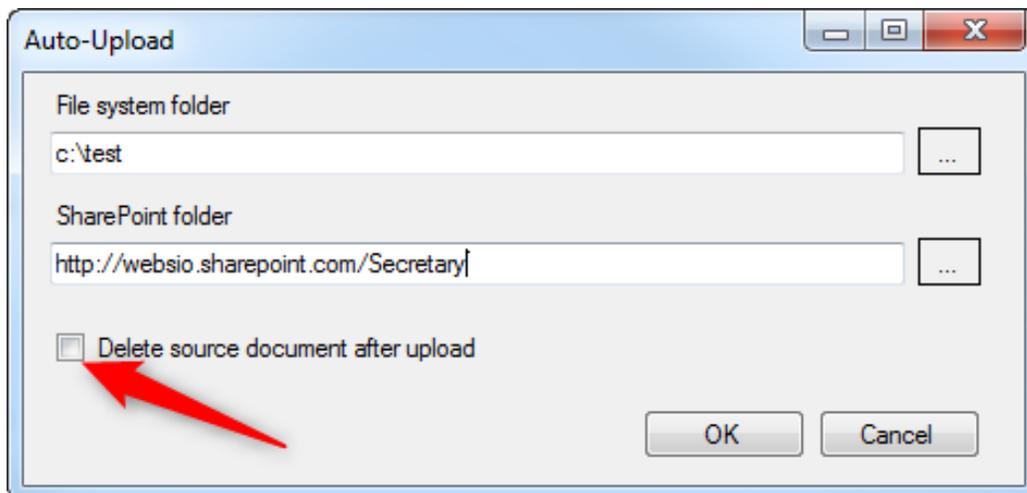


4. Select corresponding SharePoint folder



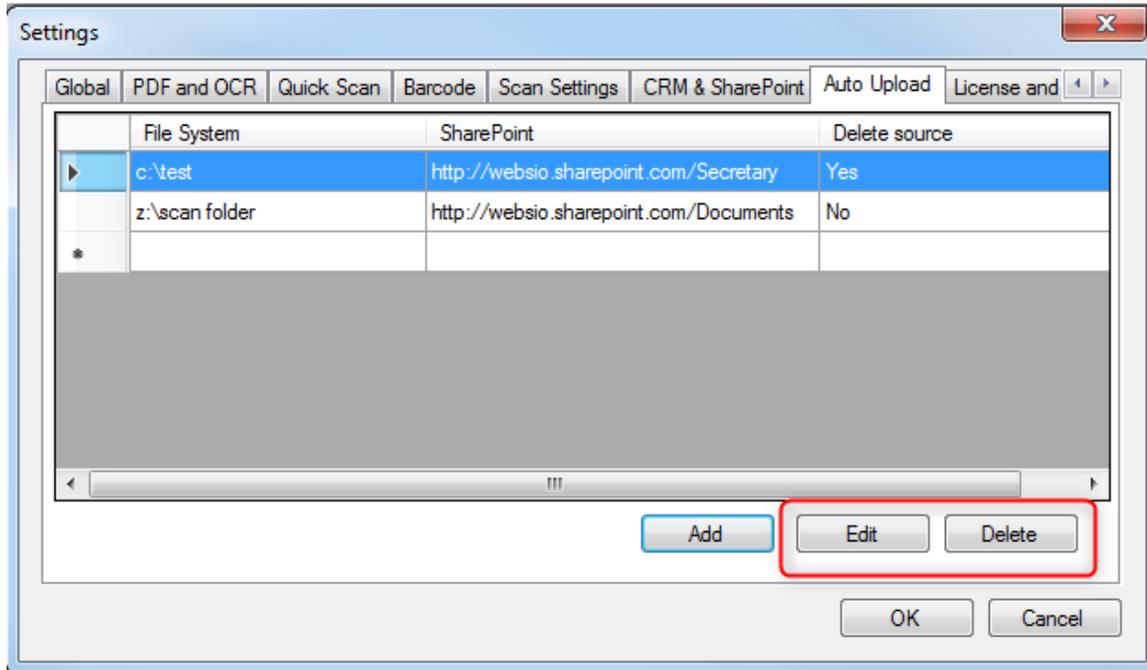


5. Decide if you want to delete source document after upload



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



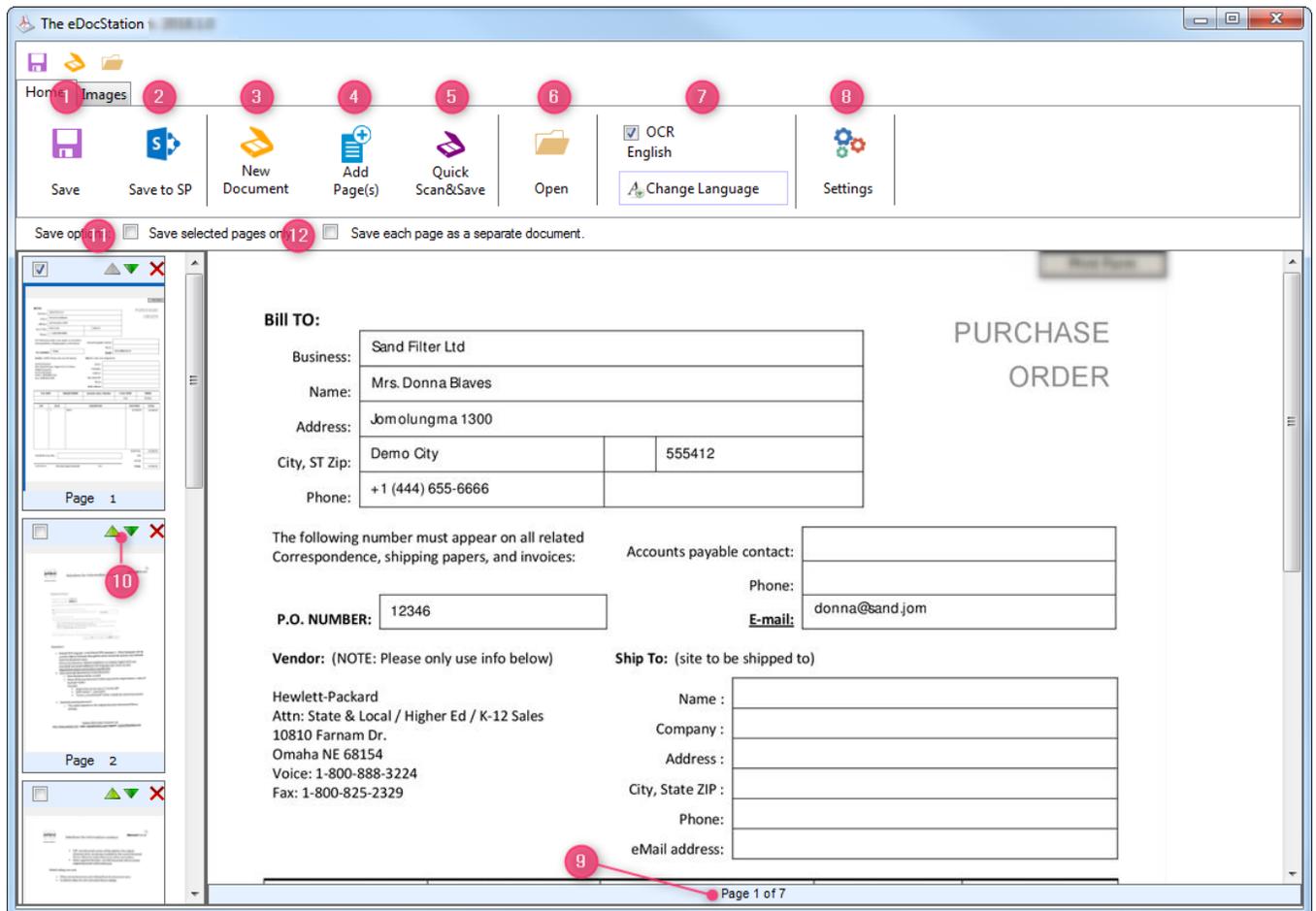
8. Close the eDocStation. Documents will be uploaded by background service “eDocClient”.
9. Copy document(s) into the previously selected file system folder, it will be automatically processed and uploaded.



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User Interface

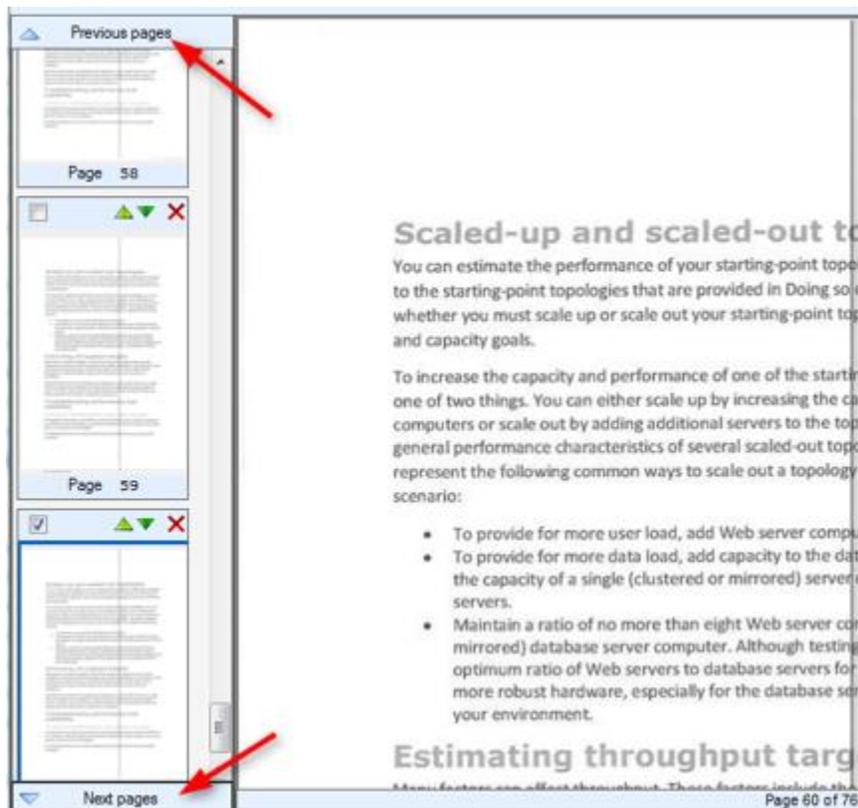
Tab "Home". Main view.



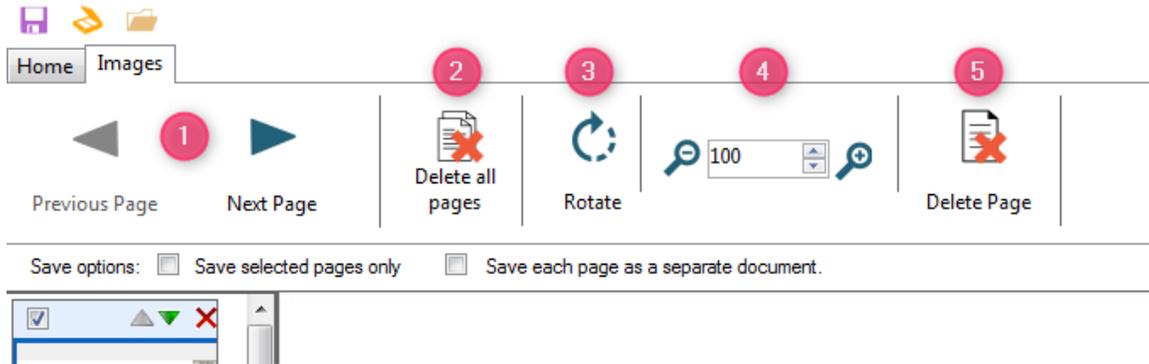
1. Save.
2. Save to SharePoint (visible in the standalone mode only)
3. Scan new document
4. Add Page(s). Scan pages and add them to the current document
5. Quick Scan & Save. Read section "[Quick Scan](#)" for details
6. Open. Load files from file system.

7. OCR. Select OCR checkbox to use text recognition process. **P**
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.

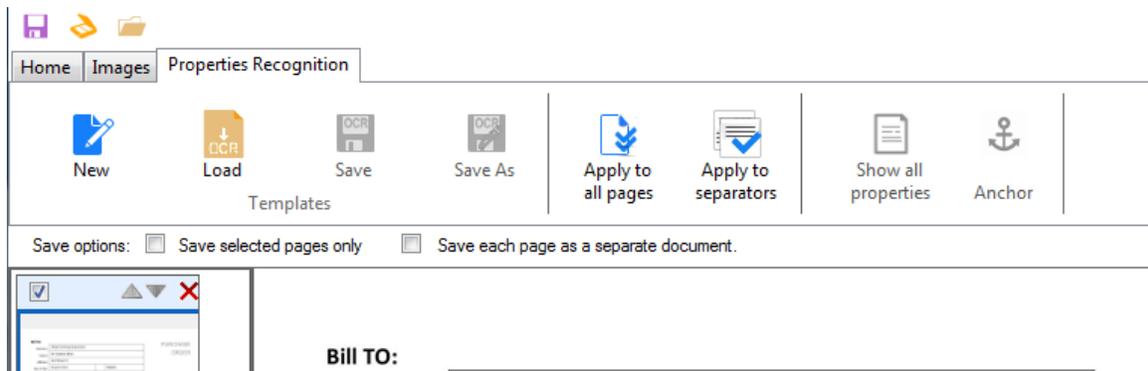


Tab “Images”



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

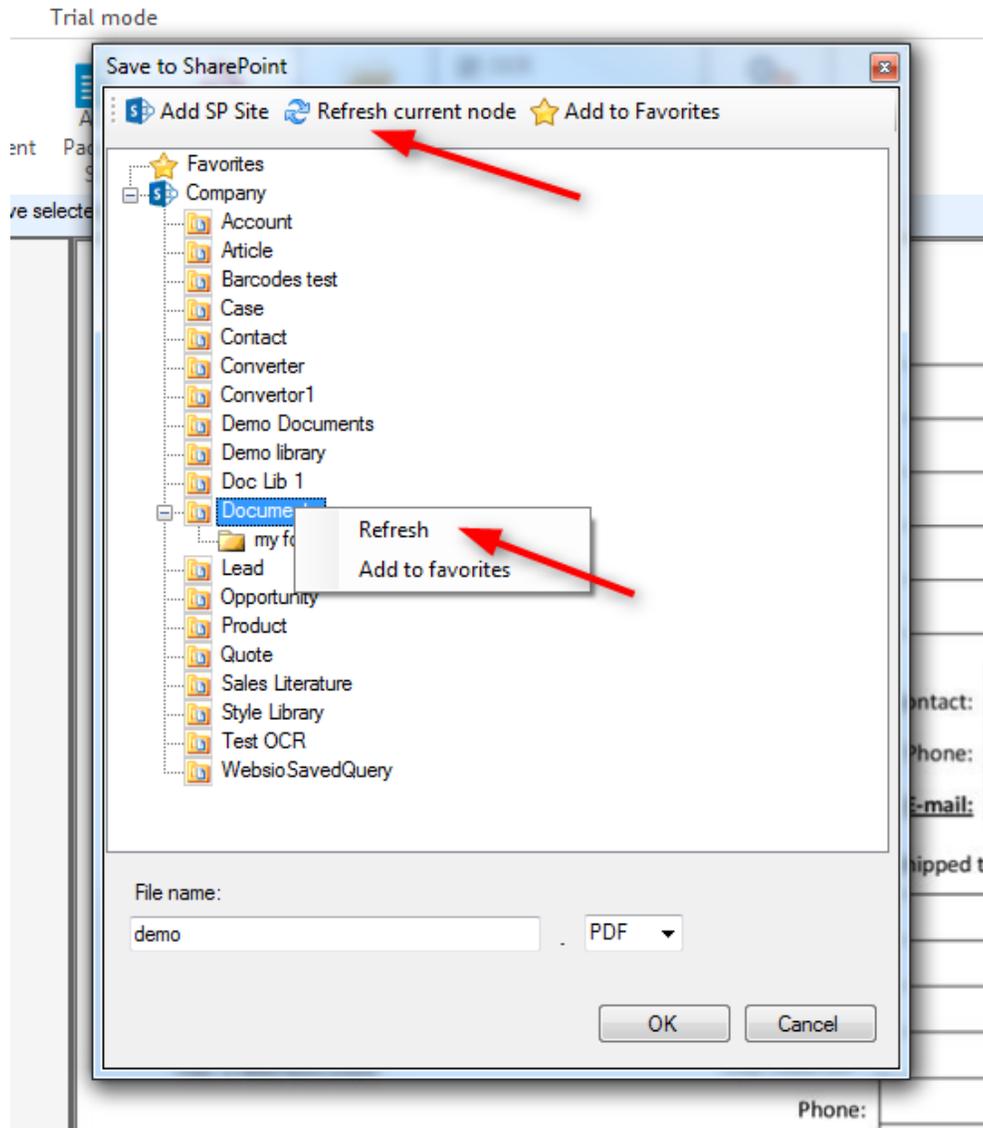
Tab “Properties Recognition”



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

“Save to SharePoint” dialog

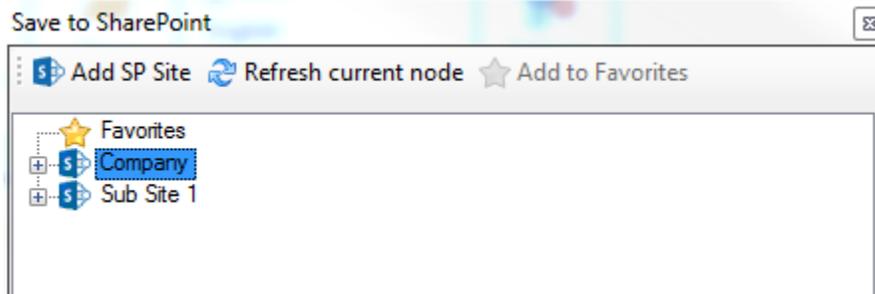
1. The dialog stores site structure in the cache. If you added/removed SharePoint libraries or folder after they were cached, use option “Refresh” to load them from SharePoint



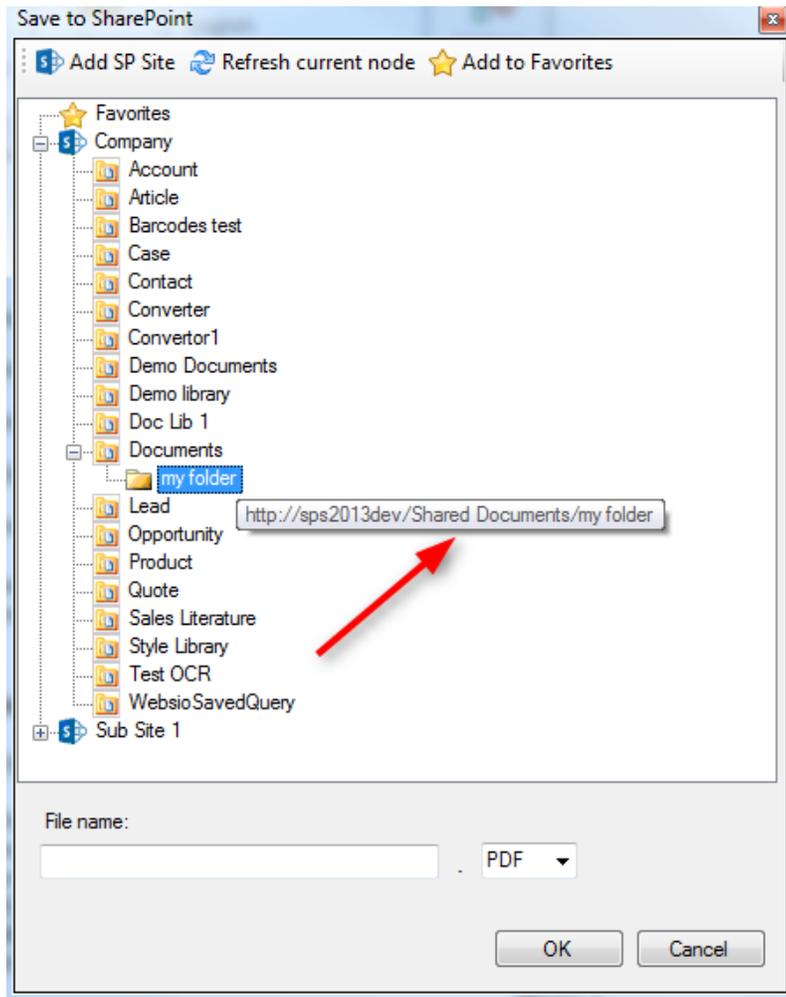


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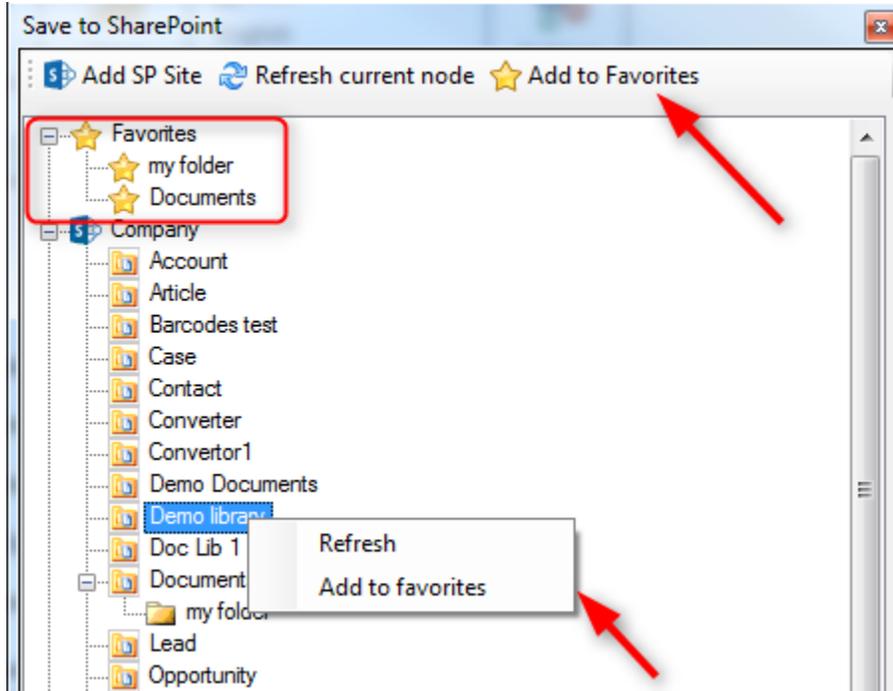
2. Site tree does not contains sub-sites. Use button “Add SP Site” to add URL of each sub-site separately. For example, sites <http://spscompany> and <http://spscompany/subsite1> :



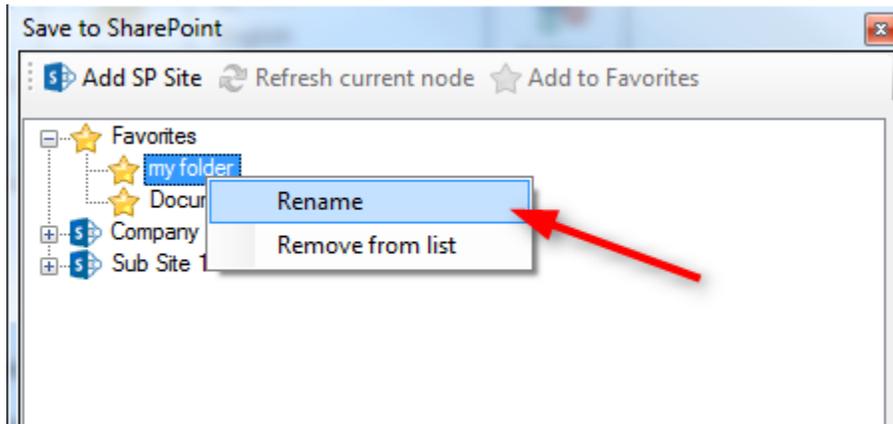
3. Tooltip of each node displays URL of the current site/library/folder.



- 4. Add frequently used libraries/folders to Favorites

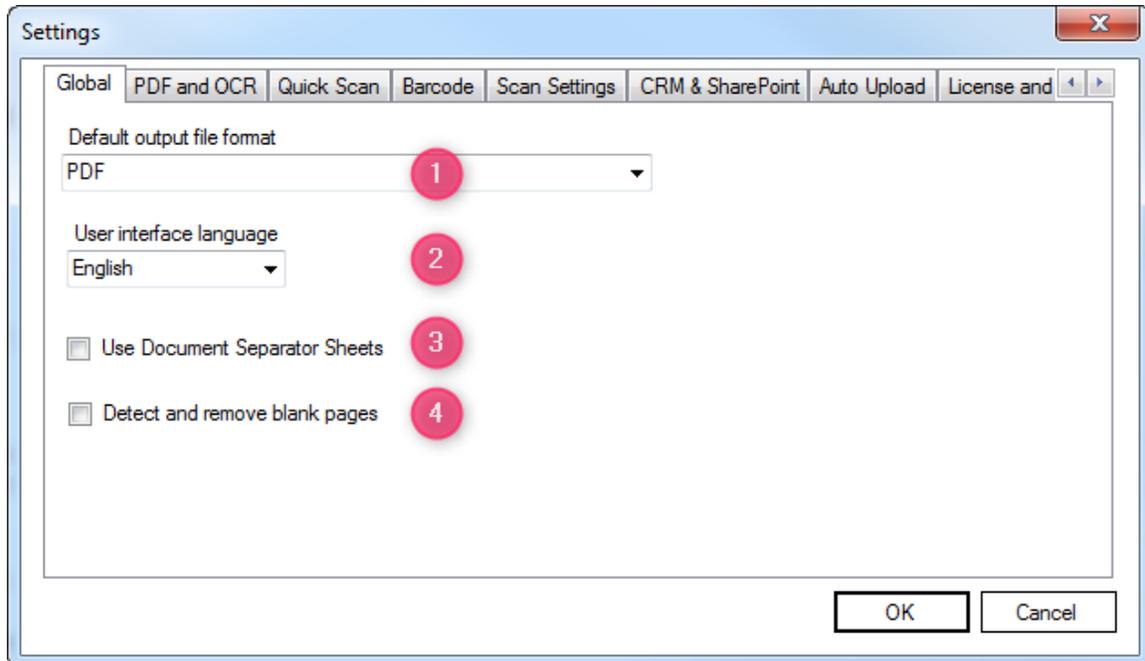


- 5. Use menu option "Rename" to provide to Favorite item more meaningful value.



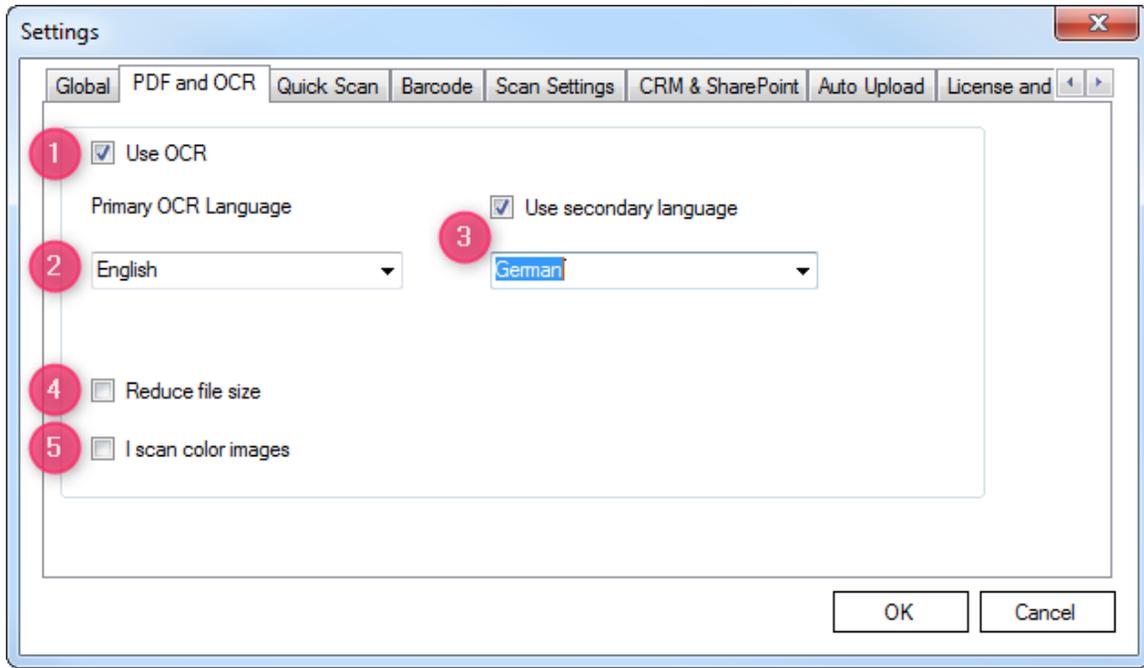
Settings

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



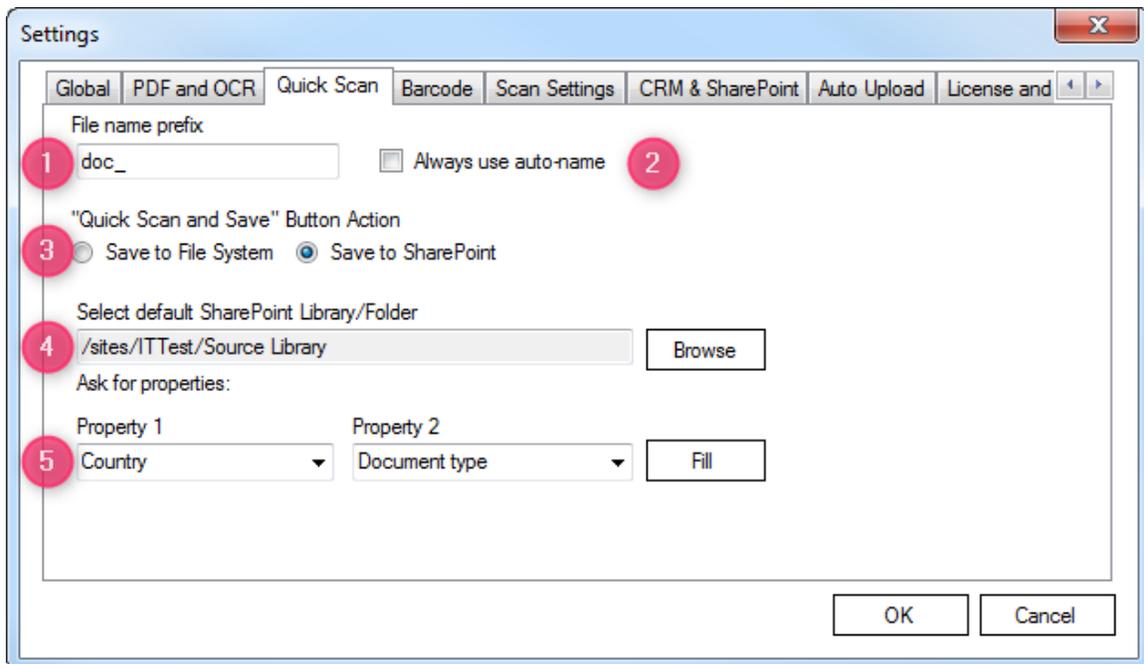
1. Use OCR – enable/disable OCR.
- 2-3 OCR languages.

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 a title bar with a close button (X) and a tabbed interface with the following tabs: Global, PDF and OCR, Quick Scan (selected), Barcode, Scan Settings, CRM & SharePoint, Auto Upload, and License and... The main content area contains the following settings:

- 1** File name prefix: A text box containing 'doc_'.
- 2** Always use auto-name: A checkbox that is currently unchecked.
- 3** "Quick Scan and Save" Button Action: Radio buttons for 'Save to File System' (unchecked) and 'Save to SharePoint' (checked).
- 4** Select default SharePoint Library/Folder: A text box containing '/sites/ITTest/Source Library' and a 'Browse' button.
- 5** Ask for properties: Two dropdown menus labeled 'Property 1' (containing 'Country') and 'Property 2' (containing 'Document type'), followed by a 'Fill' button.

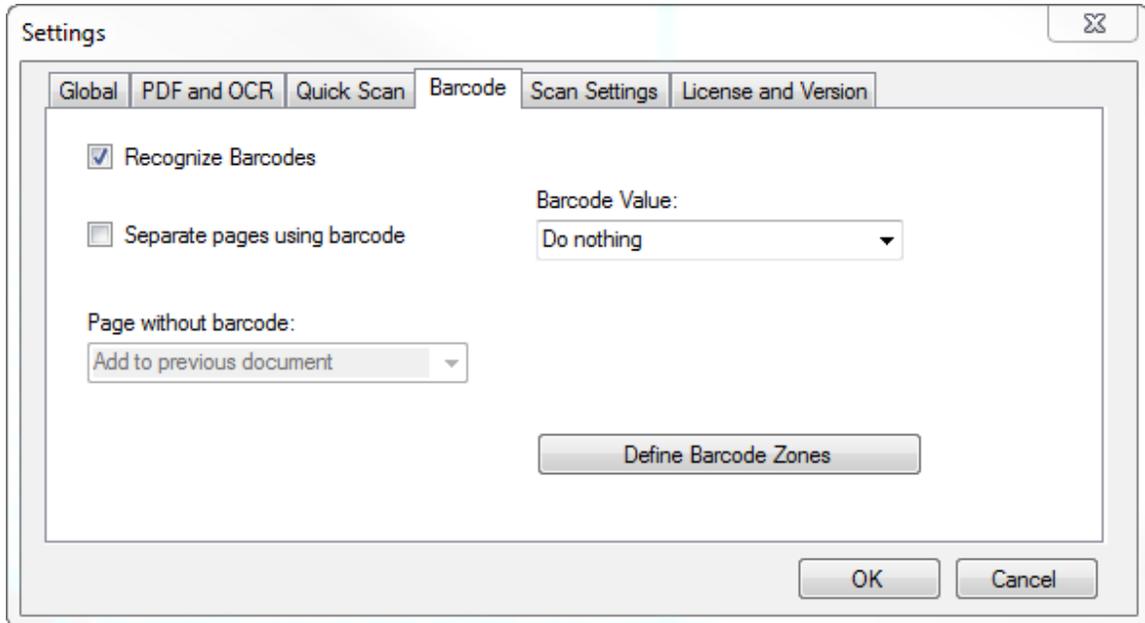
At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

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.



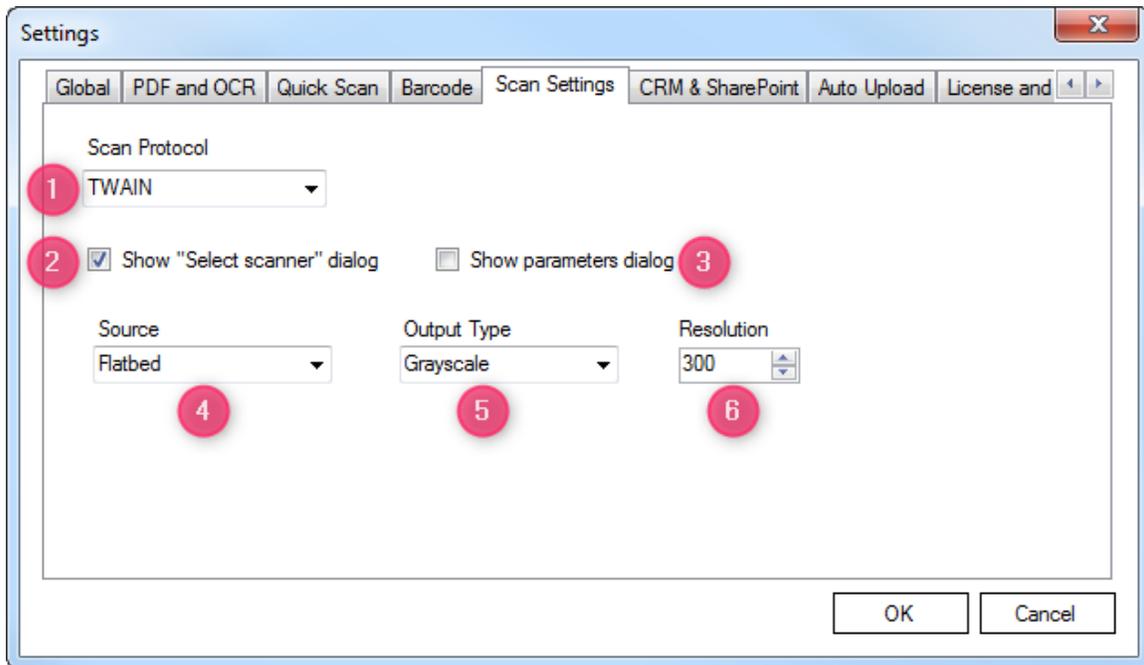
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Barcode



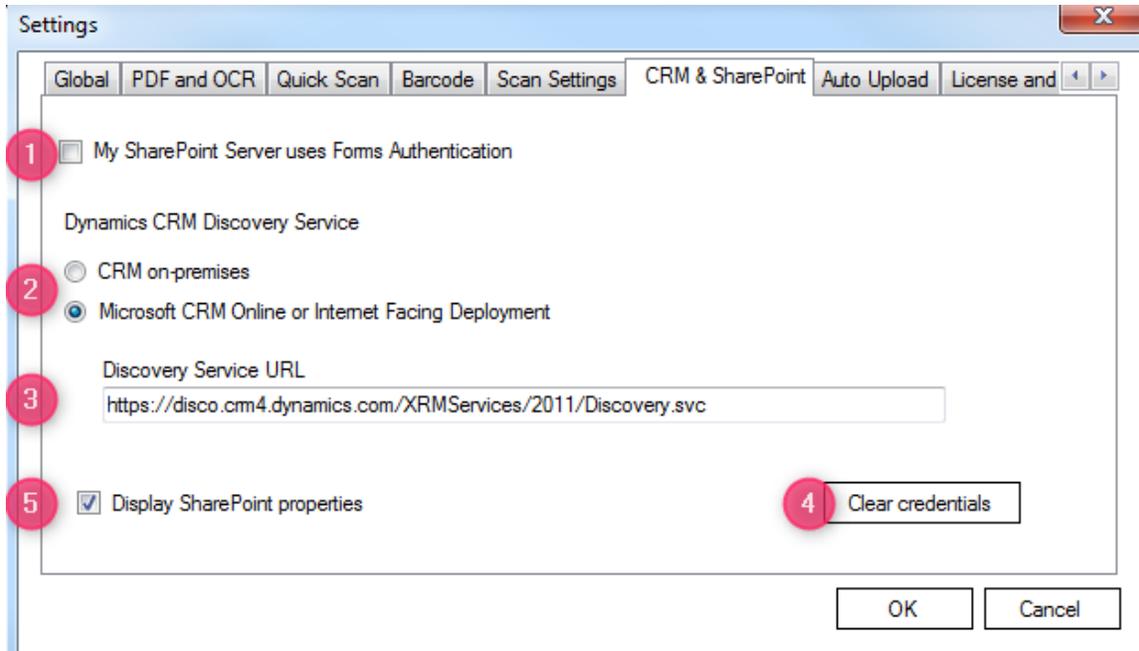
See section [“Barcodes”](#) above

Scan Settings



1. Scan protocol. TWAIN or WIA. Default value: WIA.
2. Show "Select Scanner" dialog. Select 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

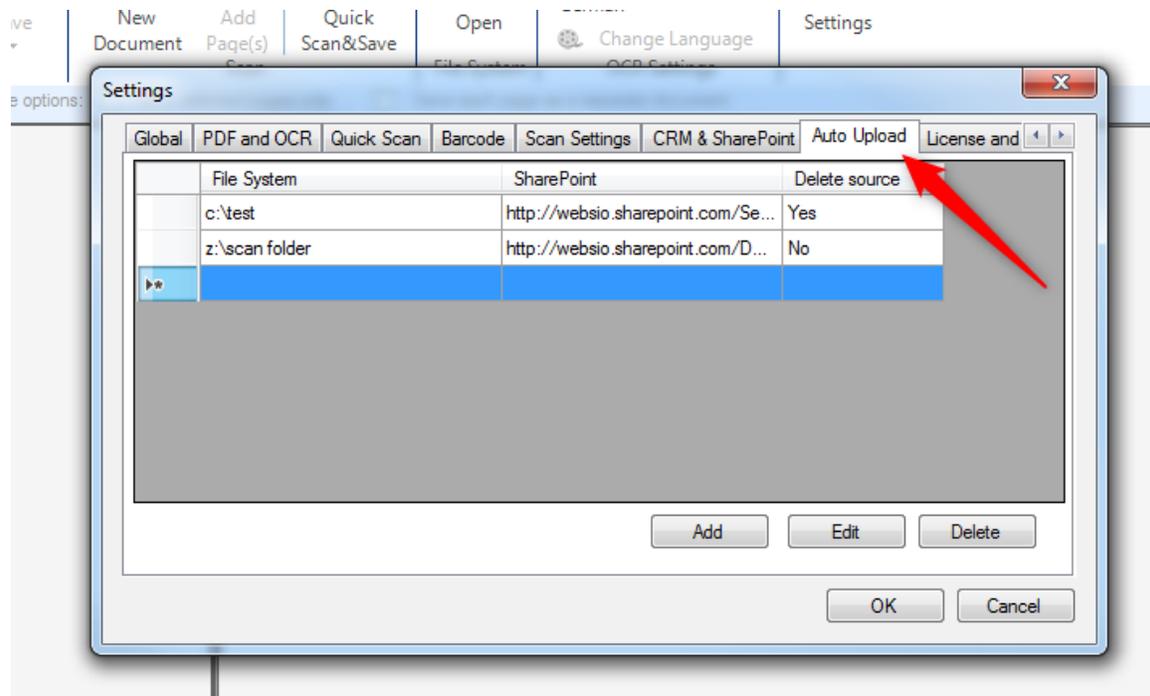


1. If your SharePoint server uses Forms Authentication, select “My SharePoint uses Forms Authentication”. If you are not sure which authentication model is in use on your SharePoint, leave this checkbox unchecked.
2. Not relevant for SharePoint
3. Not relevant for SharePoint
4. Clear previously saved 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 installation process

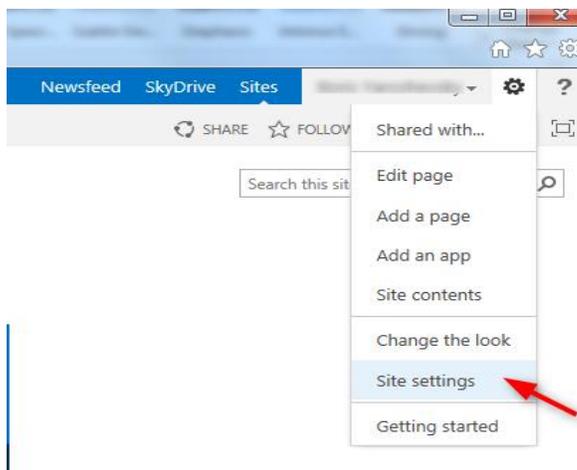


Solution:

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

Button "Scan document" does not appear

1. Open top-level site of the site collection where you are going to use the plug-in.
2. Open "Site actions" menu and select option "Site Settings "



3. In the Site Settings window select option "Site collection features"



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Site Collection Administration

Recycle bin

Search Result Sources

Search Result Types

Search Query Rules

Search Schema

Search Settings

Search Configuration Import

Search Configuration Export

Site collection features 

Site hierarchy

Site collection audit settings

Audit log reports

Portal site connection

4. In the list of installed features find "Websio Scanner Plug-in 2013 Professional" and press "Activate".

If you can't find this option go on to the next step.

| | | | |
|---|--|--|--------|
|  | SharePoint Server Standard Site Collection features Features such as user profiles and search, included in the SharePoint Server Standard License. | Deactivate | Active |
|  | Site Policy Allows site collection administrators to define retention schedules that apply to a site and all its content. | Deactivate | Active |
|  | Three-state workflow Use this workflow to track items in a list. | Deactivate | Active |
|  | Video and Rich Media Provides libraries, content types, and web parts for storing, managing, and viewing rich media assets, like images, sound clips, and videos. | Deactivate | Active |
|  | Websio Scanner Plug-in 2013 Professional | Activate  | |
|  | Workflows Aggregated set of out-of-box workflow features provided by SharePoint. | Activate | |

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5. Open SharePoint 2013 Central Administration, select "System Settings" and click on the "Manage farm solutions" link.

A screenshot of the SharePoint 2013 Central Administration interface. The top navigation bar is blue with "SharePoint" on the left and "Newsfeed", "SkyDrive", and "Sites" on the right. Below the navigation bar, there are "BROWSE" and "PAGE" options. The main content area is titled "System Settings" and features a left-hand navigation menu with the following items: "Central Administration", "Application Management", "System Settings" (highlighted), "Monitoring", "Backup and Restore", "Security", "Upgrade and Migration", and "General Application Settings". The main content area is divided into three sections: "Servers" with a server icon and links for "Manage servers in this farm" and "Manage services on server"; "E-Mail and Text Messages (SMS)" with an envelope icon and links for "Configure outgoing e-mail settings", "Configure incoming e-mail settings", and "Configure mobile account"; and "Farm Management" with a magnifying glass icon and links for "Configure alternate access mappings", "Manage farm features", "Manage farm solutions" (highlighted with a red arrow), "Manage user solutions", "Configure privacy options", and "Configure cross-firewall access zone".

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- In the Solution Management window be sure that websioscannerplugin2013.wsp has status "Deployed".

A screenshot of the SharePoint Solution Management interface. The top navigation bar includes 'SharePoint', 'Newsfeed', 'SkyDrive', 'Sites', and 'WEBSIO\adm'. The main content area shows the 'Solution Management' title and a table of installed solutions. The table has columns for 'Name', 'Status', and 'Deployed To'. The solution 'websioscannerplugin2013.wsp' is listed with a status of 'Deployed' and is 'Globally deployed'. A left-hand navigation menu includes 'Central Administration', 'Application Management', 'System Settings', 'Monitoring', 'Backup and Restore', and 'Security'.

| Name | Status | Deployed To |
|-----------------------------|----------|--------------------|
| websioscannerplugin2013.wsp | Deployed | Globally deployed. |

- In the Solution Properties window press "Deploy solution". Wait until status "Deployed" will appear. Deployment process may take few minutes.
- Return to step 1.



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After click on the "Scan Document" button nothing happens

1. 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.
2. For Windows 7/8 disable Internet Explorer Protected Mode for your SharePoint portal zone
3. Ensure that the default 32-bit Internet Explorer is in use
4. Assign your site to the Local Intranet (preferred) or Trusted Site Security Zone

After click on the "Scan Document" 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 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



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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.*