

## Scan, PDF and OCR for SharePoint

### Administrator Guide

Product components: Scan, PDF and OCR SharePoint app + eDocStation desktop client

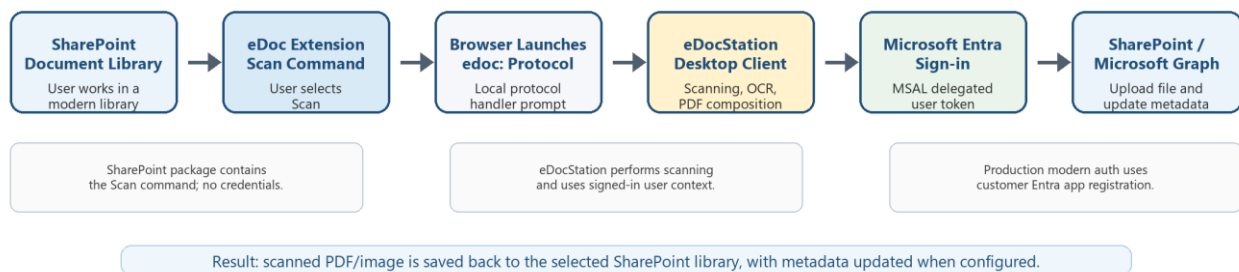
Version: 2026 administrator guide draft | Platform: Microsoft 365 / SharePoint Online

#### Guide scope

This document is for administrators. It covers planning, SharePoint deployment, Microsoft Entra authentication, eDocStation workstation deployment, verification, updates, and troubleshooting. End-user scanning workflows belong in the separate User Guide.

Component	Administrator responsibility
Scan, PDF and OCR SharePoint app	Deploy the SharePoint Framework package to the tenant App Catalog and make the Scan command available in SharePoint document libraries.
eDocStation	Install and configure the Windows desktop client on user workstations, including scanner drivers and the local edoc: protocol handler.
Microsoft Entra	Create and approve the customer app registration used for modern authentication for all deployments.

#### Scan, PDF and OCR for SharePoint - Product Architecture



Product architecture overview: SharePoint library command launches eDocStation through the local edoc: protocol; eDocStation signs in through Microsoft Entra and saves the result back to SharePoint through SharePoint / Microsoft Graph.

# 1. Product Overview

Scan, PDF and OCR for SharePoint is a SharePoint Online scanning and document capture solution. It lets organizations scan paper documents, compose files from images or PDFs, apply OCR/barcode/property recognition, and save the resulting documents into SharePoint document libraries.

The product is made of two cooperating components:

Component	What it does	Where it is installed
Scan, PDF and OCR SharePoint app	Adds the Scan command to SharePoint document libraries.	SharePoint Online tenant through the App Catalog.
eDocStation	Runs scanning, OCR, barcode recognition, PDF/image composition, upload, and SharePoint metadata handling.	Windows workstation used by the scanner operator.

## 1.1 Administrative Goals

- Deploy the SharePoint package.
- Configure Microsoft Entra modern authentication for all deployments. Scan, PDF and OCR for SharePoint supports only the Microsoft Entra modern authentication model.
- Install eDocStation on workstations and verify that SharePoint “Scan” command can launch the local eDocStation desktop client from the browser.
- Confirm SharePoint libraries display the expected commands and accept uploaded documents.

# 2. Prerequisites

## 2.1 SharePoint Online

- A Microsoft 365 tenant with SharePoint Online.
- A tenant App Catalog / Apps site. In the SharePoint admin center, this is managed under More features > Apps.
- Administrator access to upload custom apps to the App Catalog.
- Administrator access to enable the package for organization-wide deployment from the tenant App Catalog.

## 2.2 Windows Workstations

- Windows 10 or Windows 11 recommended.
- Microsoft Edge, Google Chrome, or Mozilla Firefox.
- Scanner vendor driver installed and tested in Windows before testing eDocStation.
- eDocStation installer available to the workstation administrator or software deployment system.
- User rights to run the desktop client and access the local scanner.

## 2.3 Microsoft Entra

- Permission to create an app registration or a process for requesting one.
- Permission to grant admin consent for delegated permissions when required by tenant policy.

# 3. SharePoint Deployment

## 3.1 Confirm or Open the Tenant App Catalog

1. Open Microsoft 365 admin center with a SharePoint Administrator or Global Administrator account.
2. Open the SharePoint admin center.
3. Go to More features.
4. Under Apps, select Open. This opens the Apps site / App Catalog management area.
5. If the tenant does not yet have an App Catalog, create one according to the tenant's governance process.

## 3.2 Upload the scanocr.sppkg Package

The current SharePoint package file is: scanocr.sppkg

1. In the Apps site, open Manage apps or the Apps for SharePoint library.
2. Select Upload.
3. Browse to scanocr.sppkg.
4. Upload the package.
5. When SharePoint shows the trust/deployment dialog, review the app name and publisher information.
6. Select Deploy / Make this solution available to all sites, depending on the SharePoint dialog shown in the tenant.

**Apps**

Manage apps

App requests

More features

SharePoint Store

API access

SharePoint admin center



## Manage apps

Upload, enable, and manage apps. To update SharePoint Store apps, go to the [classic experience](#).

[Learn more about managing apps](#)

Upload ...

### Apps for SharePoint

Icon	Title	App version	State
	eDoc Extension	1.0.0.10	Enabled
	PnP Modern Search - Search Web Parts - v4	4.16.0.0	Enabled

### 3.3 Tenant-Wide Deployment

1. Scan, PDF and OCR is deployed as a SharePoint Framework tenant-wide extension.
2. After the package is enabled in the App Catalog, SharePoint creates an organization-wide extension entry for modern document libraries.
3. The extension targets document libraries and adds the Scan command to the document library command bar.
4. The app does not need to be manually added through Site contents on each site.
5. Tenant-wide propagation can take several minutes. If the command does not appear immediately, wait and refresh the document library page.
6. Verify the entry in the Tenant Wide Extensions list if the command is still missing after propagation.
7. If the tenant previously used a site-level app install, remove the legacy site-level instance only after confirming the tenant-wide extension is active.
8. Open a modern document library and refresh the browser.

[← Back to Onboarding](#)

## My apps

### Filter

[All](#)[From my organization](#)[From SharePoint Store](#)

### Apps you can add

These are custom apps allowed by your organization. Built-in apps such [experience](#).



eDoc Extension

My organization

Add

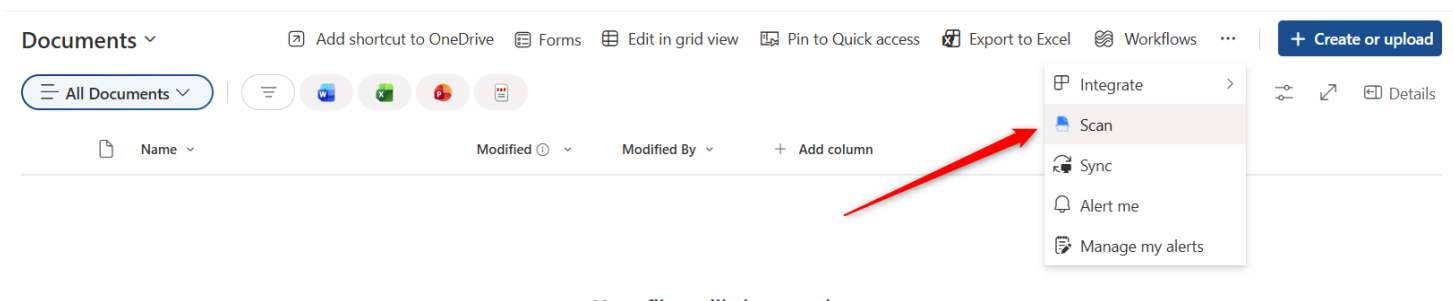


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### 3.4 Verify the SharePoint Scan Command

1. Open a modern document library on the target site.
2. Confirm the Scan command appears in the document library command bar.
3. Do not start the Scan workflow yet. End-to-end browser launch is verified after eDocStation is installed on the workstation.



## 4. SharePoint App Update and Removal

### 4.1 Update the Scan, PDF and OCR Package

1. Open the Apps site / App Catalog.
2. Open Manage apps or Apps for SharePoint.
3. Upload the new scanocr.sppkg package.
4. When SharePoint asks whether to replace the existing package, confirm replacement.
5. Deploy the updated package.
6. Open a modern document library and verify that the Scan command still appears.

If the command disappears after an update, verify that the package is enabled in the App Catalog and that the tenant-wide extension entry exists. Tenant-wide changes can take several minutes to propagate. If a legacy site-level app instance exists from an earlier deployment, remove it only after confirming the tenant-wide extension is active.

### 4.2 Repair a Site Where the Command Is Missing

1. Open the tenant App Catalog / Apps for SharePoint library.
2. Confirm that Scan, PDF and OCR is enabled and available to all sites.
3. Open the Tenant Wide Extensions list and confirm the Scan, PDF and OCR entry exists.
4. Confirm that the entry targets document libraries and is not disabled.
5. Wait for tenant-wide propagation and refresh the target document library in a new browser session.
6. If a legacy site-level app instance is still present and conflicts with the tenant-wide deployment, remove the site-level instance after confirming the tenant-wide entry is active.
7. Return to the document library and refresh the browser.

#### Known repair pattern

During troubleshooting, reinstalling the app on the site recreated the missing ListView Command Set custom action when a normal update did not.

## 5. Modern Authentication Requirement

Scan, PDF and OCR for SharePoint supports Microsoft Entra modern authentication only.

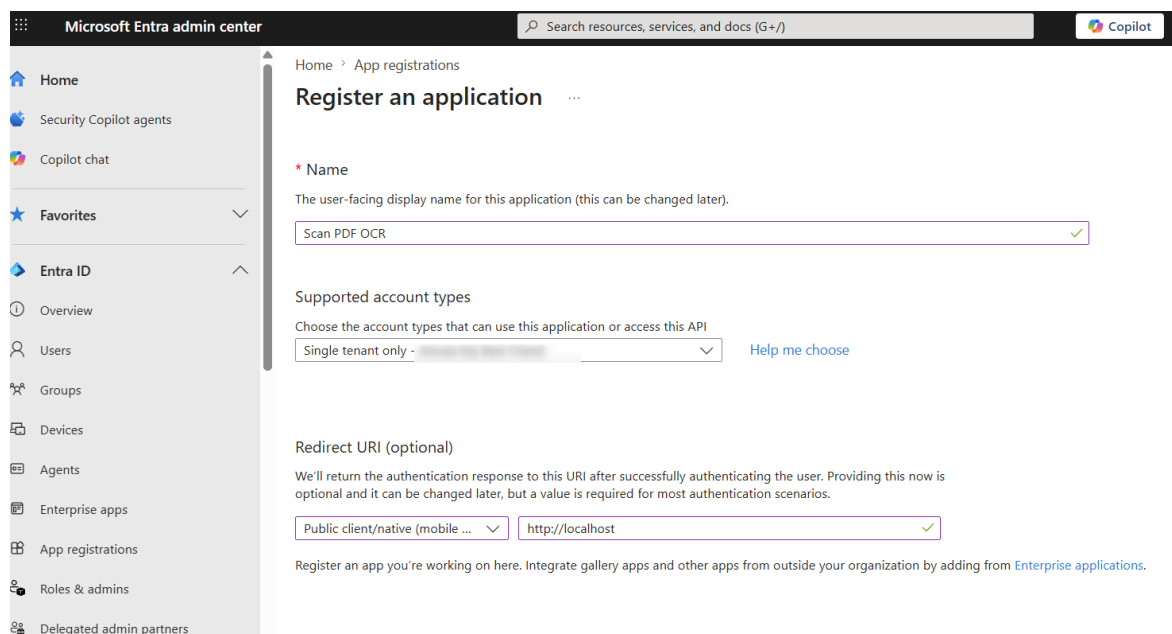
Before eDocStation can sign in to SharePoint Online, the customer tenant must have a customer-owned Microsoft Entra app registration with the required redirect URI, delegated permissions, and administrator consent.

If the trial evaluator cannot create or approve an Entra app registration, ask the customer Microsoft 365 administrator to complete the app registration and consent steps in the next section before testing SharePoint upload.

## 6. Microsoft Entra App Registration

### 6.1 Create the Customer App Registration

1. Open Microsoft Entra admin center.
2. Go to Identity > Applications > App registrations.
3. Select New registration.
4. Name the app Scan PDF OCR for SharePoint, eDocStation or another customer-approved name.
5. Choose the supported account type required by the customer. Most deployments use a single-tenant app.
6. Choose “Public client/native” in the URI options and enter http://localhost as a value
7. Register the app.
8. On the Overview page, copy Application (client) ID and Directory (tenant) ID. These values are entered in eDocStation.



The screenshot shows the Microsoft Entra admin center interface. The left sidebar contains navigation links: Home, Security Copilot agents, Copilot chat, Favorites, Entra ID (expanded), Overview, Users, Groups, Devices, Agents, Enterprise apps, App registrations, Roles & admins, and Delegated admin partners. The main content area is titled 'Home > App registrations' and 'Register an application'. It includes a 'Name' field with the value 'Scan PDF OCR', a 'Supported account types' dropdown set to 'Single tenant only', and a 'Redirect URI (optional)' section with a dropdown set to 'Public client/native (mobile ...)' and a text field containing 'http://localhost'. A 'Help me choose' link is visible next to the account type dropdown. At the bottom, there is a note about integrating gallery apps and other apps from outside the organization by adding from Enterprise applications.

Deactivate Delete Endpoints Preview features

Got a second? We would love your feedback on Microsoft identity platform (previously Azure AD for developer). →

#### ^ Essentials

Display name

[eDocStation](#)

Application (client) ID

132c7a68-238d-43dc-866e-bbae6af63600

Object ID

e5f4a225-a43f-44a2-87b8-40695becbbbc

Directory (tenant) ID

[REDACTED]

Supported account types

[My organization only](#)

Client credentials

[Add a certificate or secret](#)

Redirect URIs

[0 web, 0 spa, 1 public client](#)

Application ID URI

[Add an Application ID URI](#)

Managed application in local directory

[eDocStation](#)

State

✓ Activated

Azure Active Directory Authentication Library (ADAL) and Azure AD Graph no longer receive new feature updates. We continue to provide technical security updates. Applications should be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

## 6.2 Configure Authentication Platform

1. Open the app registration.
2. Go to Authentication.
3. Select Add a platform.
4. Choose Mobile and desktop applications.
5. Add redirect URI <http://localhost>.
6. Save the configuration.
7. If the tenant UI shows Allow public client flows, enable it for the desktop public client scenario.

## 6.3 Configure API Permissions and Consent

eDocStation signs in as the user and uses delegated permissions. Do not configure a client secret for this desktop public client scenario.

Permission area	Why it is needed
Microsoft Graph delegated permissions	Modern upload uses Microsoft Graph for site/list/drive lookup, file upload, and list item field updates.
SharePoint delegated permissions	CSOM-based operations use SharePoint resource tokens for library browsing, file



	download, metadata, and template-related operations.
Admin consent	If tenant policy requires administrator consent, grant consent after reviewing the delegated permissions.

Common choices include Microsoft Graph delegated Sites.ReadWrite.All and User.Read, and SharePoint delegated AllSites.Write permission required by the tenant policy.

1. Open API permissions.
2. Select Add a permission.
3. Add the required delegated Microsoft Graph permissions.
4. Add the required delegated SharePoint permissions
5. Select Grant admin consent when the tenant requires administrator approval.
6. Confirm that the Status column shows consent granted for the organization.

Certificates & secrets
 Token configuration
 API permissions
 Expose an API
 App roles
 Owners
 Roles and administrators
 Manifest

Support + Troubleshooting
 New support request

### Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. [Learn more about permissions and consent](#)

+ Add a permission
☒ Grant admin consent

API / Permissions name	Type	Description
Microsoft Graph (2)		
<a href="#">Sites.ReadWrite.All</a>	Delegated	Edit or delete items in all site collections
<a href="#">User.Read</a>	Delegated	Sign in and read user profile
SharePoint (1)		
<a href="#">AllSites.Write</a>	Delegated	Read and write items in all site collections

## 7. eDocStation Workstation Deployment

### 7.1 Prepare the Workstation

1. Install the scanner vendor driver.
2. Test the scanner with the vendor utility or Windows scanning tool.

### 7.2 Install eDocStation

1. Sign in to Windows with an account that can install desktop software
2. Run the eDocStation installer: right click on the Websio\_eDocStation\_2026\_x.y.z\_Setup.msi and select “Run as Administrator”.
3. Accept the license agreement.
4. Complete the installation.
5. Start eDocStation once to confirm it opens.
6. Open Settings once to confirm the settings dialog is available. Modern authentication values are configured in section 7.3.

#### OCR Language Packs for Workstations

The eDocStation installer includes English OCR support only. Additional OCR Language Packs are optional workstation-side files and must be installed on each workstation that needs OCR in another language. Download the required pack from <https://www.websio.com/ocrlangpacks.aspx>. The English OCR language pack is already included in the install set and usually does not need to be downloaded separately. Installation procedure: download the required ZIP file, extract it, and copy the extracted language files into the eDocStation tessdata directory. For eDocStation and SharePoint Scan, PDF and OCR, the destination is the eDocStation installation directory\tessdata, usually C:\Program Files (x86)\Websio Information Solutions\eDocStation\tessdata. Administrator rights may be required because this directory is under Program Files. After copying the language files, restart eDocStation and verify that the language appears in OCR settings.

### 7.3 Configure eDocStation Modern Authentication

Before testing SharePoint upload from eDocStation, configure the customer tenant ID and client ID for Microsoft Entra modern authentication.

Use the Directory (tenant) ID and Application (client) ID from the customer Microsoft Entra app registration. Save the settings, then run a controlled SharePoint Scan test from a document library. If sign-in or consent fails, verify the Entra app registration, redirect URI, delegated permissions, and administrator consent.

## 8. Verification Matrix

Area	Standard UI check	Expected result
App Catalog	SharePoint admin center > More features > Apps > Manage apps	Scan, PDF and OCR package is present, enabled, and available to all sites.
Tenant-wide extension	Tenant Wide Extensions list	Scan, PDF and OCR has an organization-wide extension entry for document libraries.
Document library	Open modern document library	Scan command appears in the command bar.
Workstation	Windows Default apps by protocol	edoc protocol is associated with the eDocStation handler.
Authentication	Entra app registration > API permissions	Required delegated permissions are present and consent is granted.
Upload	Run a test scan	File is created in the selected SharePoint folder and metadata is saved when configured.

## 9. Troubleshooting

Symptom	Likely cause	Standard UI resolution
Scan button is missing	Package not enabled for all sites, tenant-wide extension missing/disabled, browser cache, or propagation delay.	Verify that Scan, PDF and OCR is enabled in the tenant App Catalog and that the tenant-wide extension entry exists. Confirm that the page is a modern document library, wait for propagation, and refresh the library in a new browser session.
Browser does not open eDocStation	edoc protocol handler not installed or blocked by browser prompt.	Check Windows Default apps by protocol and allow the browser prompt for the SharePoint site.
Modern sign-in fails	App registration, redirect URI, public client setting, or consent is incomplete.	Check Entra app Overview, Authentication and API permissions, and Sign-in logs.
Upload starts but fails	Graph/SharePoint delegated permissions or SharePoint library rights are insufficient.	Confirm admin consent and confirm the signed-in user can manually upload/edit a document in the same library.

Metadata is not saved	Required field, wrong field name, insufficient rights, or Graph list item field permission issue.	Test manual metadata editing in SharePoint and review the eDocStation SharePoint Online auth log if enabled.
Scanner is not detected	Driver or Windows scanner setup issue.	Test the scanner outside eDocStation first, reinstall driver if needed, then restart eDocStation.

## 9.1 When to Enable Logs

Enable Write SharePoint Online auth log only while diagnosing authentication or upload issues. Disable it again after troubleshooting unless support asks for continued logging.

Settings

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

SharePoint Online authentication. The active mode is controlled by license state.

Active authentication mode:

☐ Trial - legacy authentication

☒ Modern authentication (customer Entra app)

Tenant ID: 63b57ffa-2a19-4070-b7ff-069bbe11615e

Client ID: 132c7a68-238d-43dc-866e-bbae6af63600

☒ Write SharePoint Online auth log

OK Cancel

## 10. Minimal PowerShell Appendix

The preferred administrator workflow is SharePoint, Entra, and Windows UI. Use these commands only when the UI cannot show enough detail or support needs exact diagnostics.

### 10.1 Verify App Catalog Package

```
Import-Module PnP.PowerShell

$credential = Get-Credential -UserName '<admin@tenant.onmicrosoft.com>' -Message 'Enter SharePoint
credentials'

Connect-PnPOnline -Url 'https://<tenant>.sharepoint.com/sites/appcatalog' -ClientId '<PnP client id>' -
Credentials $credential

Get-PnPApp -Scope Tenant | Where-Object { $_.Title -like '*Scan*' }
```

Select-Object Id, Title, Version, Deployed, AppCatalogVersion

### Password handling

PowerShell examples must use Get-Credential or approved interactive sign-in. Do not save SharePoint passwords in scripts, project files, documentation, screenshots, or tickets.

## 11. Reference Links

- SharePoint custom apps and Apps site: <https://learn.microsoft.com/en-us/sharepoint/use-app-catalog>
- Microsoft identity platform desktop app registration: <https://learn.microsoft.com/en-us/entra/identity-platform/scenario-desktop-app-registration>
- Redirect URI configuration: <https://learn.microsoft.com/en-us/entra/identity-platform/how-to-add-redirect-uri>