

Scan, PDF and OCR for SharePoint

User Guide

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

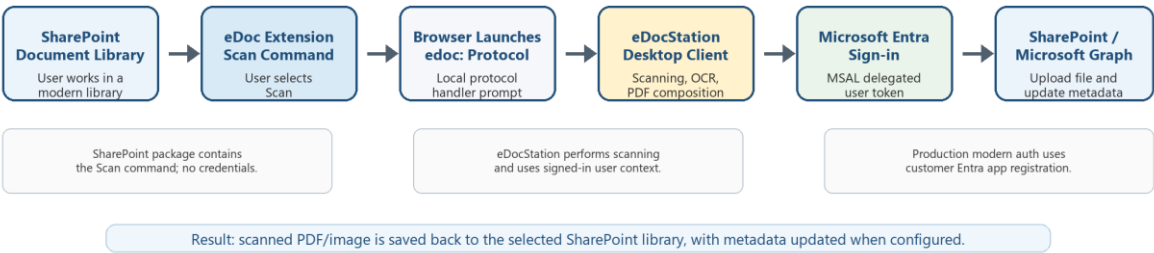
Version: 2026 user guide draft | Platform: Microsoft 365 / SharePoint Online

Guide scope

This guide is for end users who scan, compose, OCR, and upload documents to SharePoint. It does not cover SharePoint package deployment, Microsoft Entra app registration, tenant authentication policy, or workstation software rollout. For those tasks, see Scan PDF and OCR for SharePoint - Administrator Guide.docx.

Component	What the user does
Scan, PDF and OCR SharePoint app	Adds the Scan command in a SharePoint document library. The user selects Scan to start eDocStation in the context of that library.
eDocStation	Desktop application used to scan paper documents, import image/PDF files, run OCR or barcode recognition, review pages, and save the result to SharePoint.
SharePoint document library	Stores the uploaded file and, when configured, document metadata such as title, barcode value, order number, customer, or amount.

Scan, PDF and OCR for SharePoint - Product Architecture



Product workflow overview: SharePoint Scan command launches eDocStation through the browser and the saved document returns to the SharePoint library.

1. Overview

Scan, PDF and OCR for SharePoint helps users create clean electronic documents from paper, image files, and existing PDFs, then save them to SharePoint document libraries. The normal user workflow starts from a SharePoint document library, opens eDocStation on the desktop, and returns the final document to the same library.

- Scan paper documents from Windows-compatible scanners.
- Import existing PDF, TIFF, JPEG, PNG, BMP, or GIF files.
- Create PDF, TIFF, JPEG, PNG, BMP, or GIF output files.
- Create searchable PDFs with OCR.
- Recognize barcodes and optionally use them to split batches or fill SharePoint metadata.
- Use document separator sheets to split a stack of paper into multiple documents.
- Review, rotate, reorder, delete, and save selected pages.
- Save the result to SharePoint.

1.1 What This Guide Does Not Cover

- Installing or updating the SharePoint package.
- Configuring Microsoft Entra application registration, tenant ID, client ID, or admin consent.
- Changing tenant authentication policy.
- Installing eDocStation for many users through a software deployment system.
- Creating SharePoint columns, content types, retention labels, or approval workflows.

For those topics, contact your SharePoint administrator or use the Administrator Guide.

2. Before You Start

2.1 User Checklist

Requirement	What to check
SharePoint access	You can open the target SharePoint site and document library in the browser.
Library permissions	You have permission to add documents and edit required metadata in the library.
eDocStation	The eDocStation desktop client is installed on your Windows workstation.
Scanner	The scanner is connected, powered on, and works in a Windows scanning application or vendor utility.
Browser launch permission	When the browser asks to open eDocStation through the edoc: protocol, you allow the prompt for the trusted SharePoint site.

Ask your administrator

If Scan is missing, eDocStation does not open from the browser, sign-in fails, or you are asked for tenant/client settings, do not try to configure the tenant yourself. Ask the administrator to verify the setup using the Administrator Guide.

2.2 Recommended Scanner Preparation

Scanner drivers

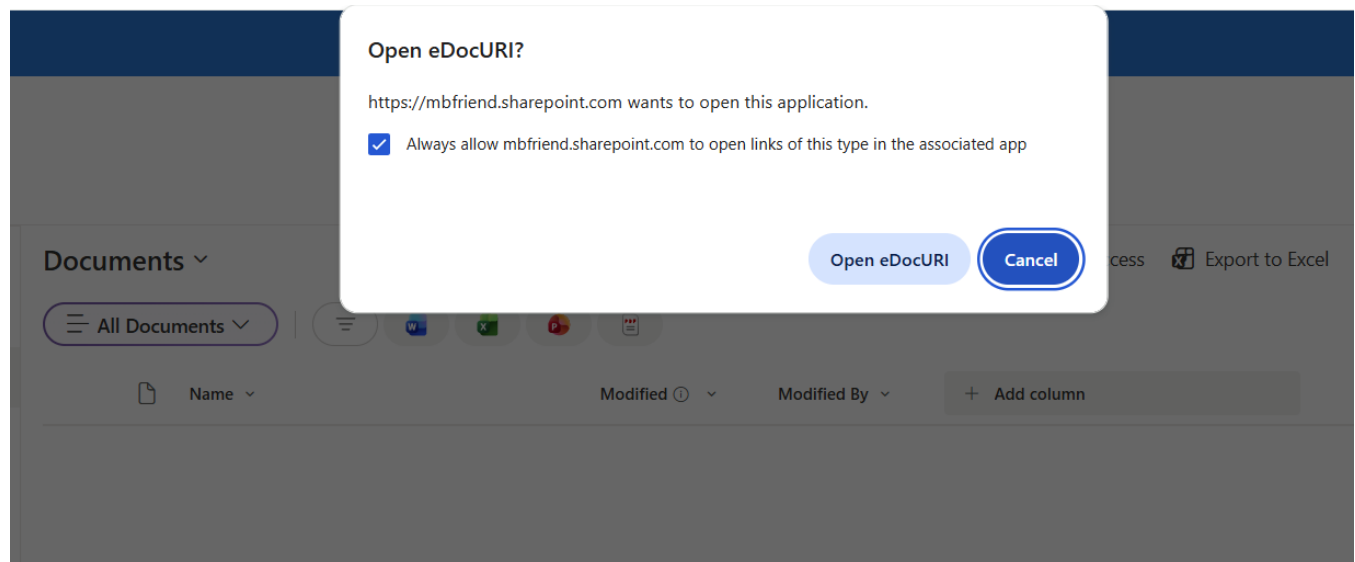
Scan, PDF and OCR for SharePoint does not install scanner drivers. eDocStation uses the scanner drivers that are already installed in Windows by the scanner vendor or by IT. If a scanner is not visible in Windows, or does not work in a standard Windows scanning tool or the vendor utility, install or repair the scanner driver before using eDocStation.

- Use 300 dpi grayscale for most OCR documents.
- Use black and white only when file size matters more than image detail.
- Use color only when the document contains color stamps, markings, or images that must be preserved.
- Clean the scanner glass or feeder path before large batches.
- Fan paper before using a feeder to reduce double-feed risk.

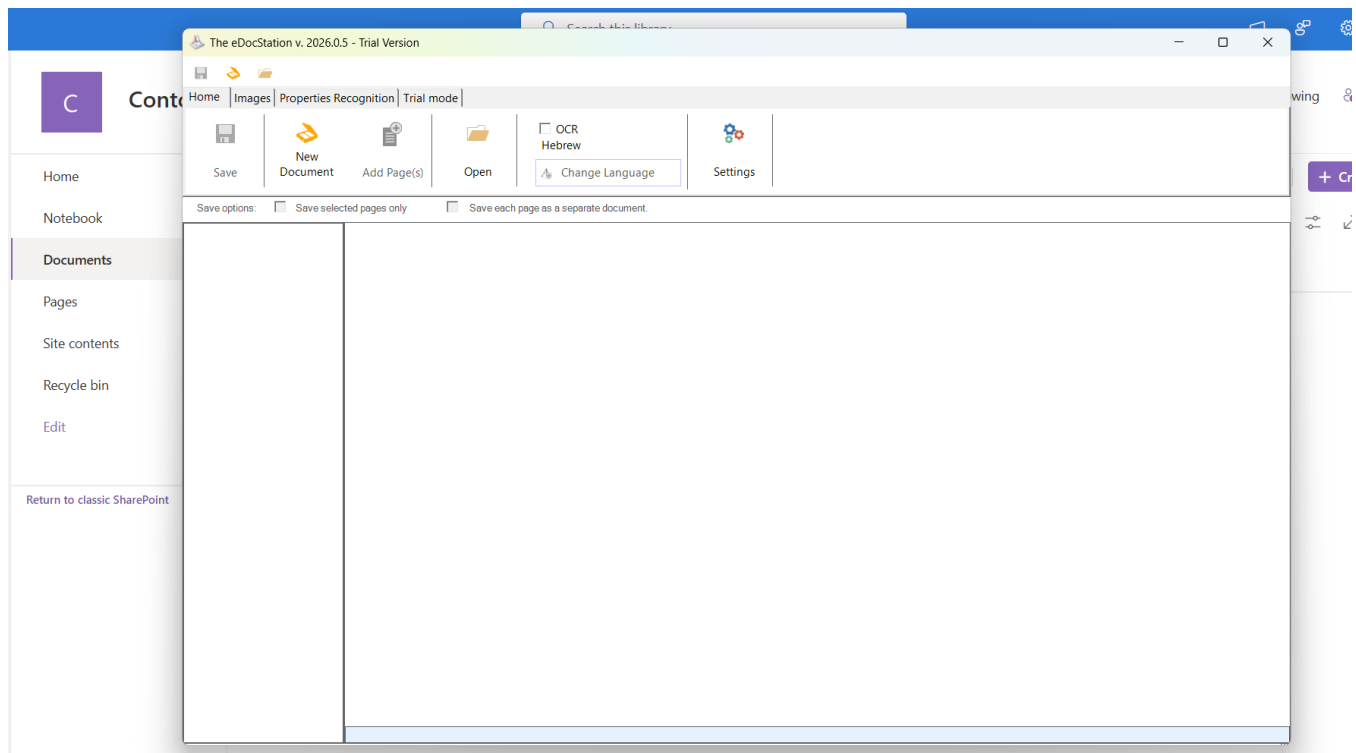
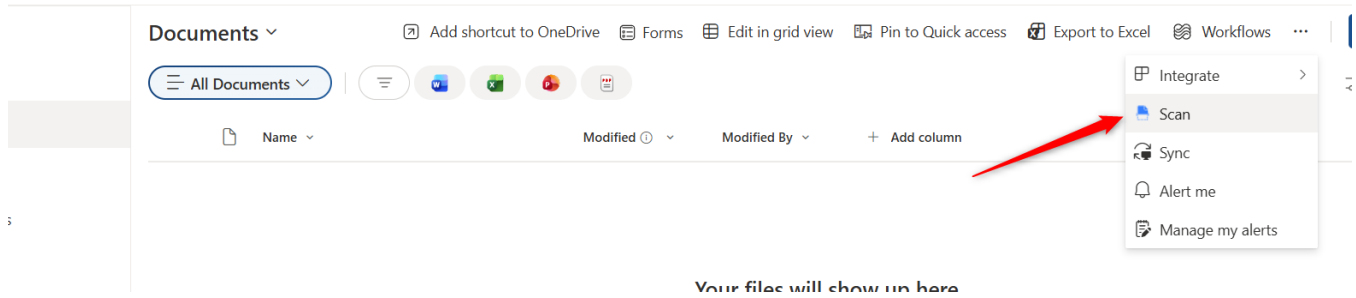
3. Start Scanning from SharePoint

This is the standard workflow when the document should be saved back to the current SharePoint library.

1. Open the target SharePoint document library.
2. Select Scan in the command bar.
3. If the browser asks for permission to open eDocStation, allow it for the SharePoint site.



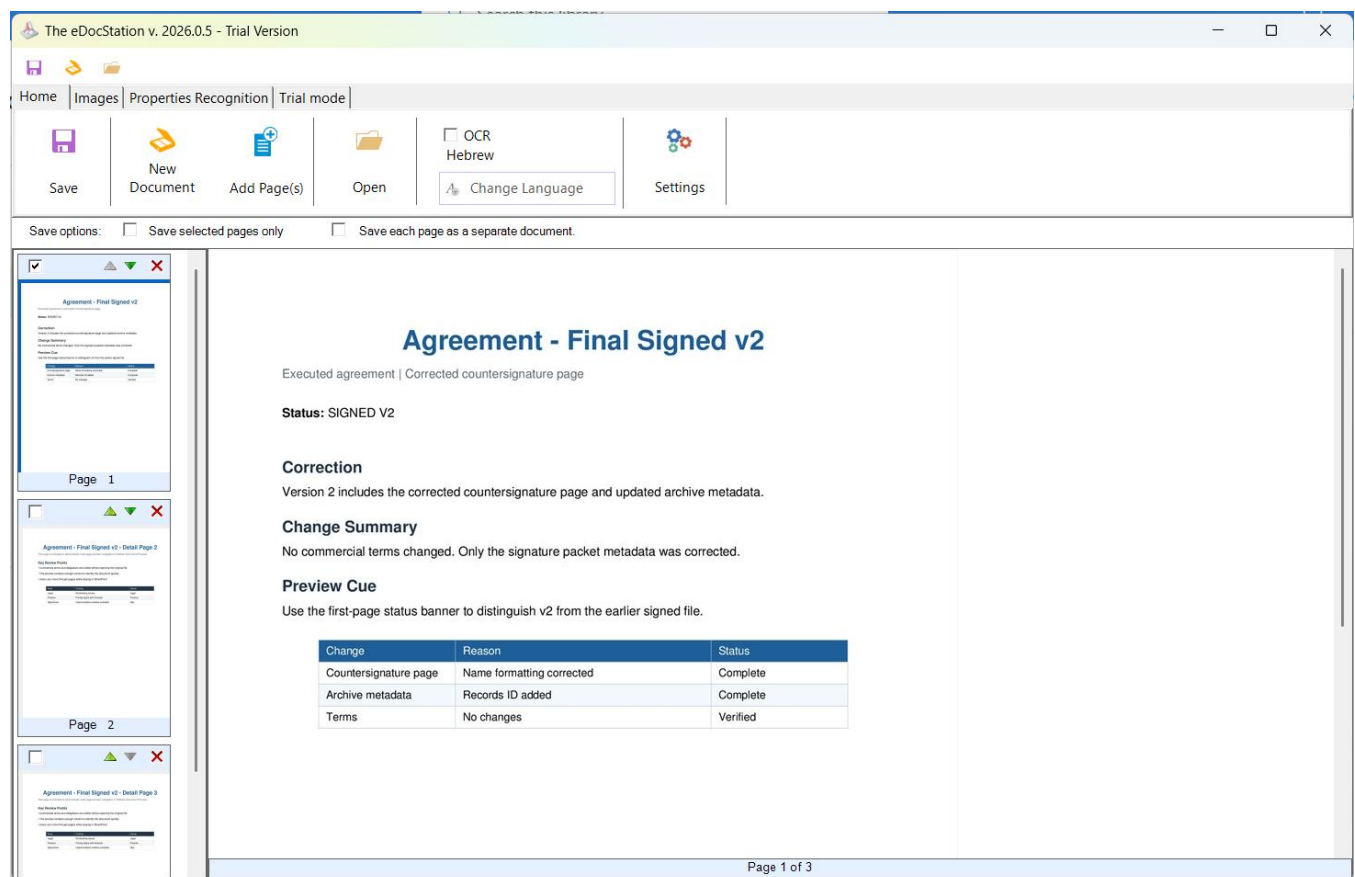
4. Wait for eDocStation to open in SharePoint mode.
5. Select New Document to scan a new set of pages, or to import existing image/PDF files into the workspace.



4. eDocStation Workspace

The eDocStation workspace is where you collect pages, review them, run OCR or recognition features, and save the finished document.

Area	Purpose
Home tab	Start a new scan, add pages, open files, save the document, enable OCR, and open settings.
Page thumbnails	Review pages, select pages, and navigate larger documents.
Image tools	Rotate, zoom, clear, or delete pages.
Properties Recognition tab	Define or review fields recognized from the document image.
Barcode settings/results	Recognize barcode values, split documents, or save barcode values to SharePoint metadata.

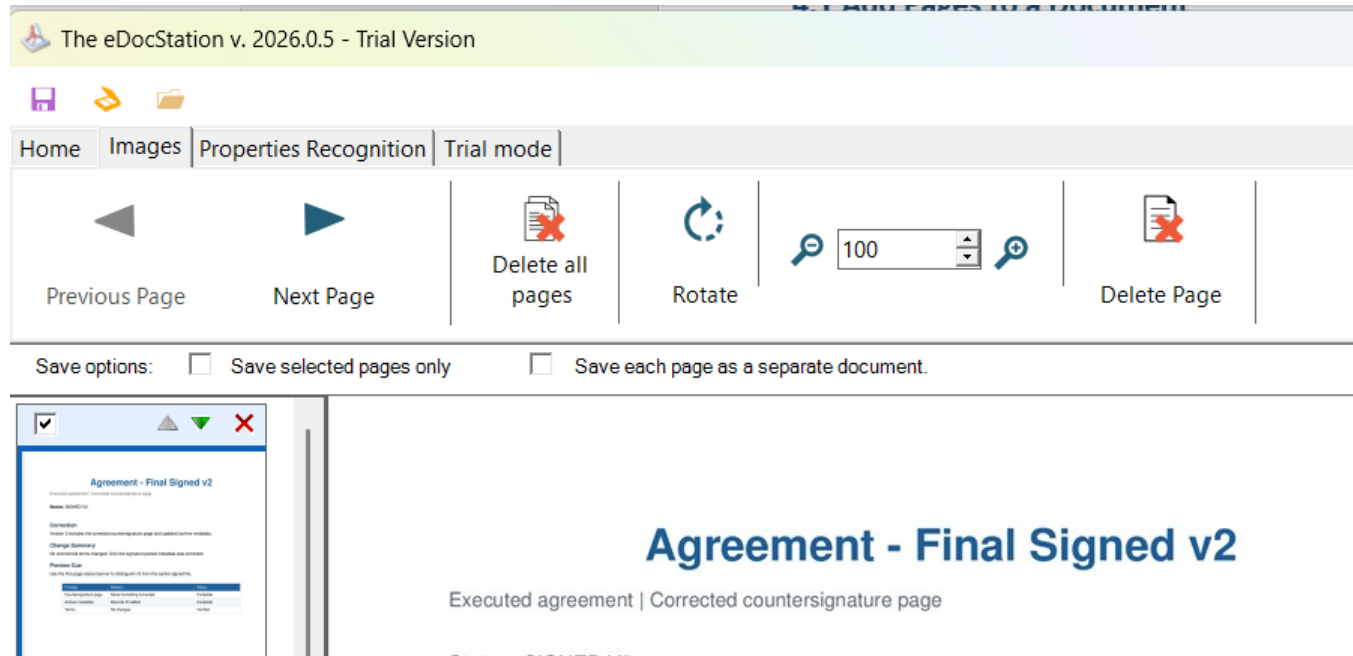


4.1 Add Pages to a Document

- Use New Document when starting a new scan job.
- Use Add Page(s) to scan more pages into the current document.
- Use Open to load files from the local file system into the current workspace.
- Use thumbnails to confirm page order before saving.

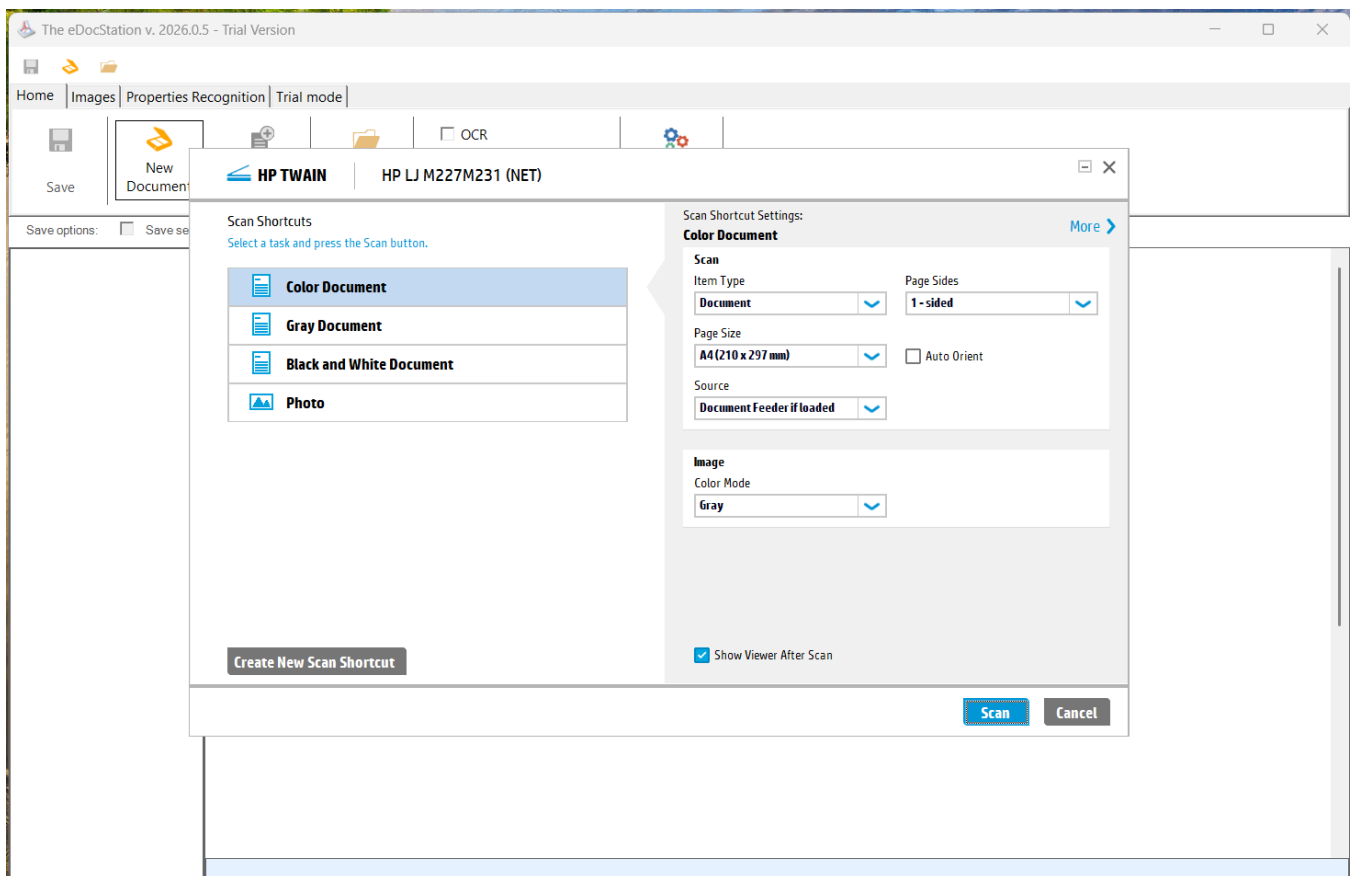
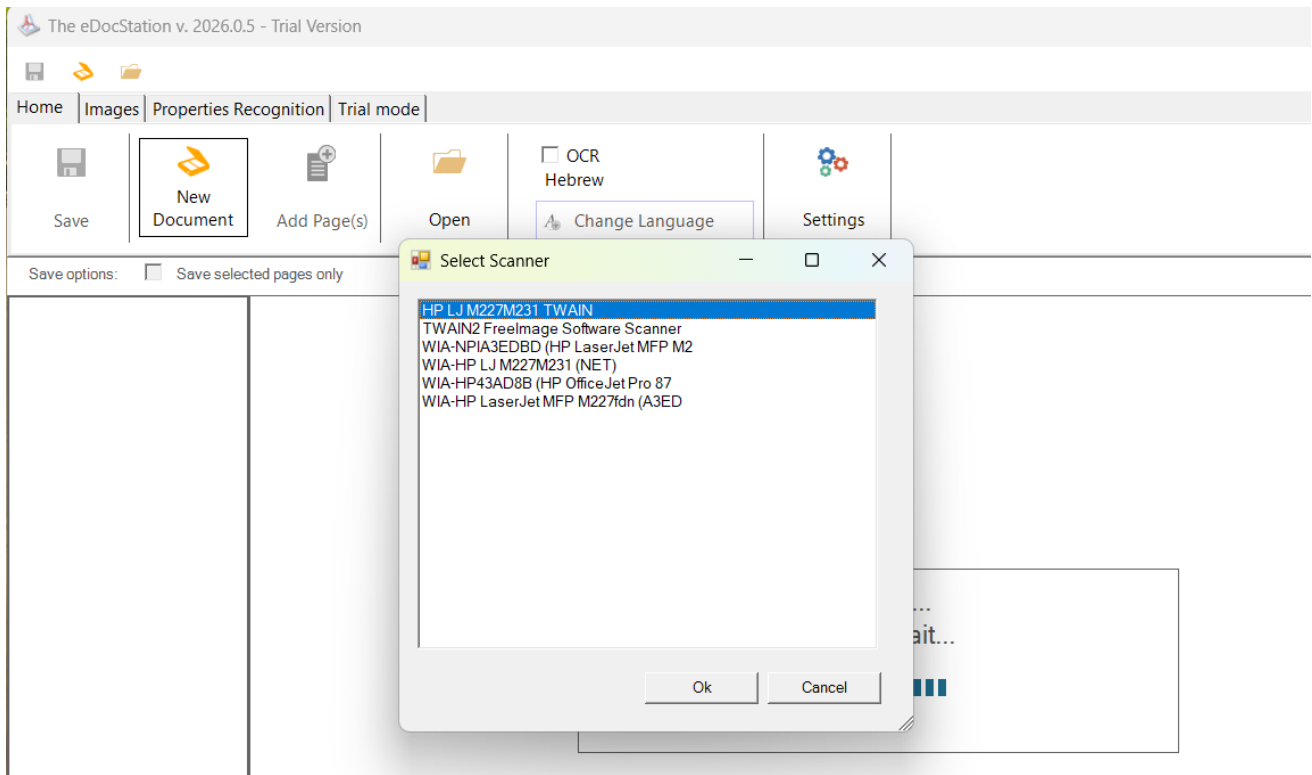
4.2 Review and Edit Pages

- Rotate pages that were scanned upside down or sideways.
- Delete blank or incorrect pages before saving.
- Reorder pages by using the page-order controls.
- Use Save selected pages only when only part of the batch should become the final document.
- Use Save each page as a separate document when every page should be uploaded as its own file.



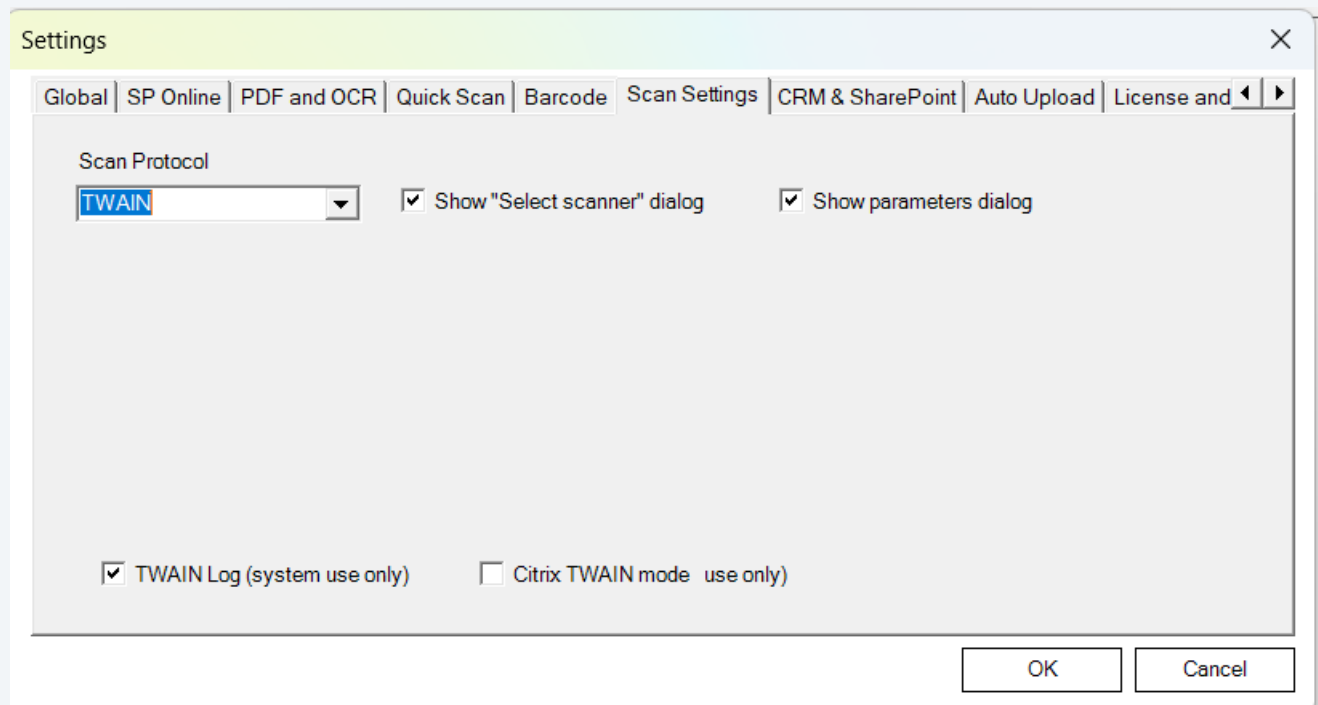
5. Scan and Save a Document

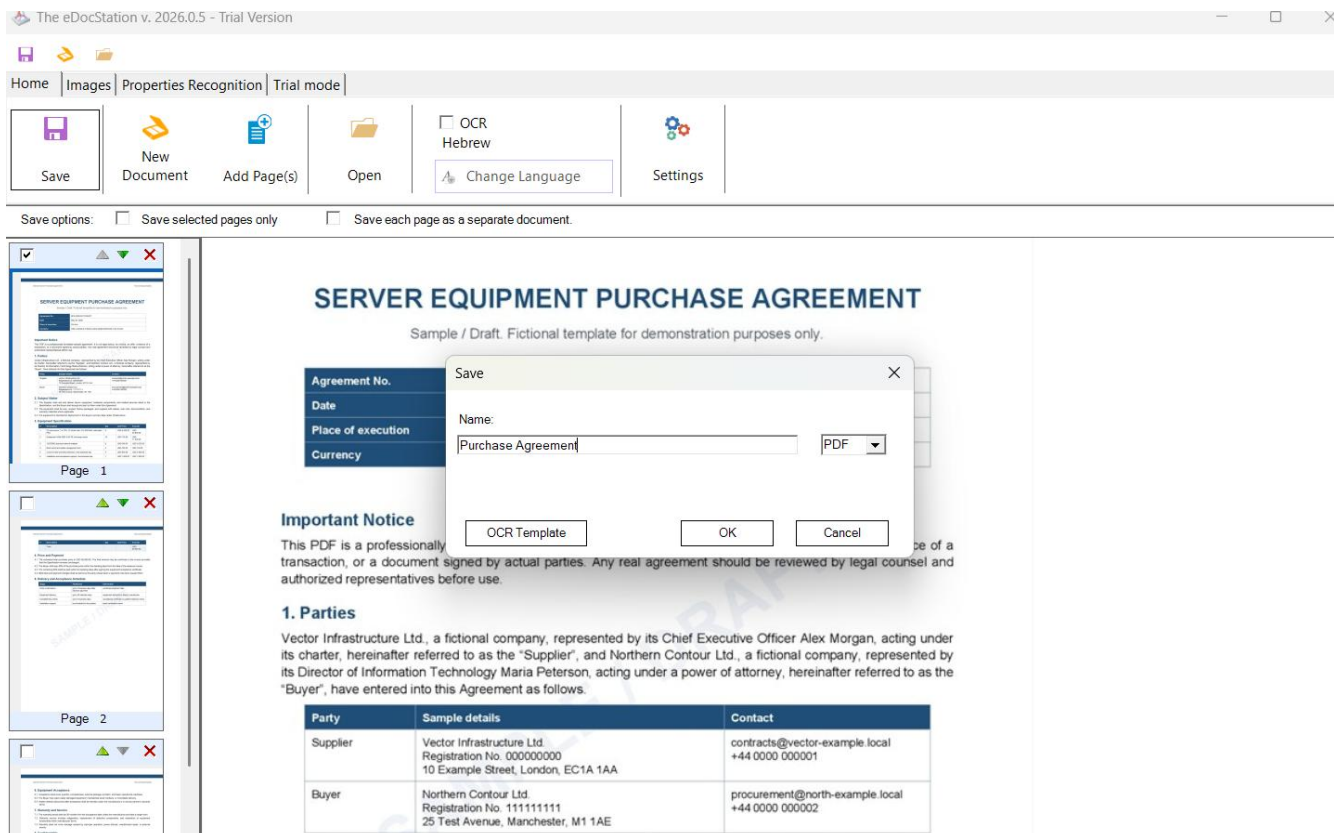
1. Start from SharePoint and select Scan, or open eDocStation from the desktop shortcut.
2. Select the scanner and scan parameters if prompted.
3. Scan the pages or import the source files.
4. Review pages and correct rotation/order before saving.
5. Choose the output format, usually PDF for SharePoint document storage.
6. Enter a file name unless automatic naming is enabled.
7. Select Save to upload to SharePoint.



TWAIN and WIA scanner options

TWAIN and WIA are scanner driver interfaces used by Windows applications to communicate with scanners. WIA usually opens the standard Windows scanning dialog and is often simpler for basic scanning. TWAIN usually opens the scanner vendor's own dialog and may expose device-specific options such as feeder behavior, duplex mode, blank-page detection, color processing, compression, or advanced image cleanup. When a TWAIN dialog is displayed, the visible options are provided by the installed scanner driver, not by eDocStation. The exact labels and available settings can therefore differ by scanner model, driver version, and vendor software package. The scan interface is selected in eDocStation Settings > Scan Settings > Scan protocol. Not every scanner has a TWAIN driver installed or available from the vendor. WIA is supported by almost all Windows-compatible scanners and is usually the safest first choice. If you are not sure which protocol your scanner supports, or which one your team should use, ask your administrator or IT support to confirm the installed scanner drivers and the recommended protocol.





Save

Name:

Purchase Agreement

PDF

OCR Template

OK

Cancel

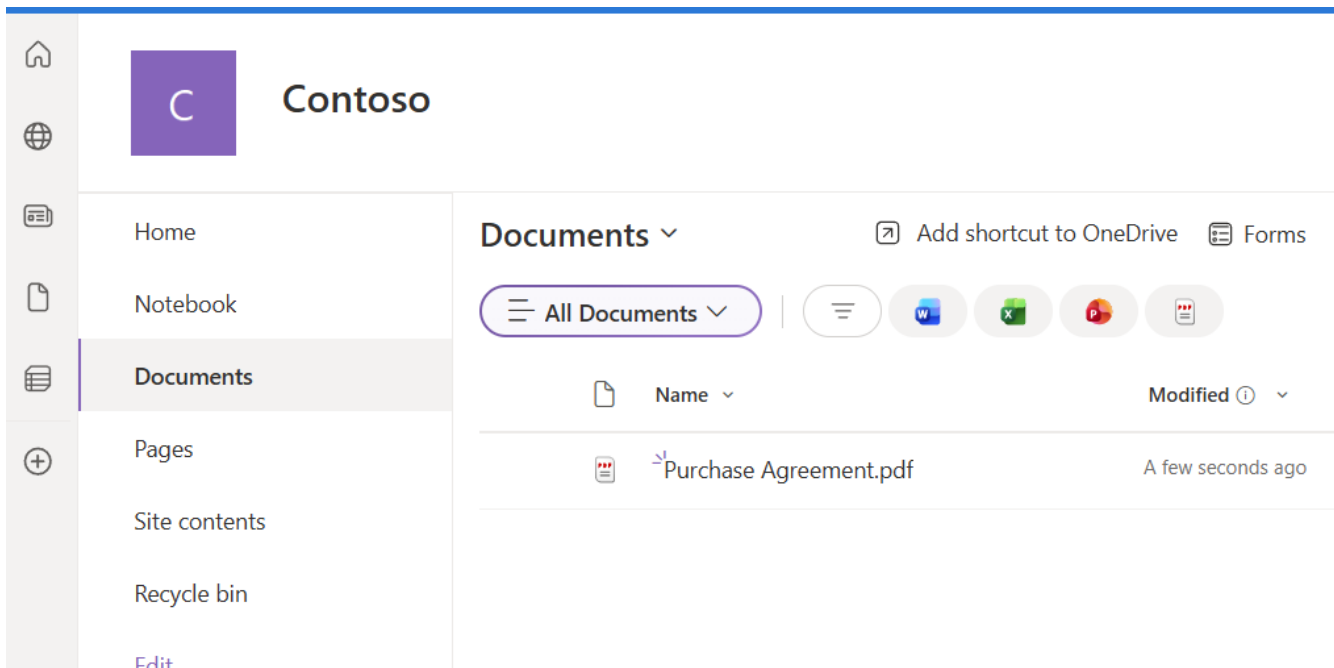
Important Notice

This PDF is a professionally prepared document, intended to be used as a sample of a transaction, or a document signed by actual parties. Any real agreement should be reviewed by legal counsel and authorized representatives before use.

1. Parties

Vector Infrastructure Ltd., a fictional company, represented by its Chief Executive Officer Alex Morgan, acting under its charter, hereinafter referred to as the "Supplier", and Northern Contour Ltd., a fictional company, represented by its Director of Information Technology Maria Peterson, acting under a power of attorney, hereinafter referred to as the "Buyer", have entered into this Agreement as follows.

Party	Sample details	Contact
Supplier	Vector Infrastructure Ltd. Registration No. 000000000 10 Example Street, London, EC1A 1AA	contracts@vector-example.local +44 0000 000001
Buyer	Northern Contour Ltd. Registration No. 111111111 25 Test Avenue, Manchester, M1 1AE	procurement@north-example.local +44 0000 000002



Documents

Add shortcut to OneDrive Forms List

All Documents

Name

Modified



Purchase Agreement.pdf

A few seconds ago

5.1 Save Options

Option	Use when
Save the whole document	All scanned pages belong to one SharePoint file.
Save selected pages only	Only some pages in the workspace should be saved.
Save each page as a separate document	Each scanned page should become its own SharePoint file.
Quick Scan & Save	You repeatedly scan the same type of document using saved defaults.

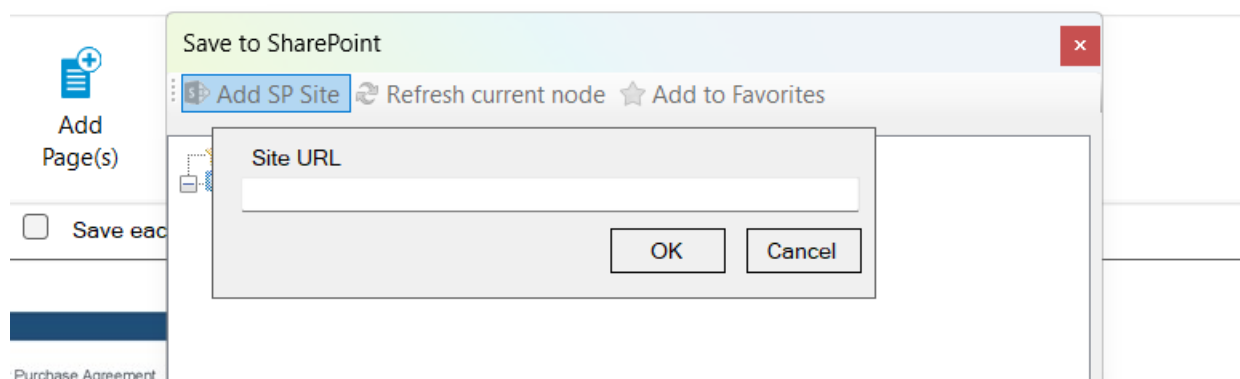
6. Save to SharePoint from Standalone eDocStation

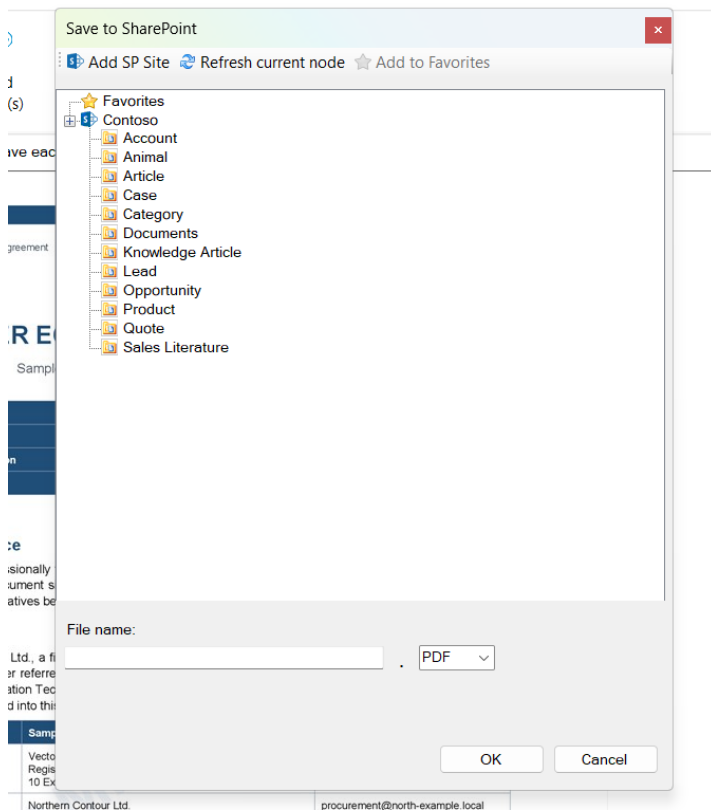
You can also open eDocStation from the Windows desktop shortcut. Use this mode when you want to scan first and choose the SharePoint location later.

1. Open eDocStation from the desktop shortcut.
2. Scan or import pages.
3. Select Save to SharePoint.
4. If this is the first time, enter the SharePoint site URL provided by your administrator.

Important! Enter site URL, do not use library URL. For example: <https://contoso.onmicrosoft.com/site1>

5. Wait for the site libraries and folders to load.
6. Select the library or folder.
7. Enter the file name and confirm the upload.





6.1 Favorites and Site Cache

- Use Refresh if a library or folder was added recently and does not appear in the tree.
- Use Add SP Site for additional sites or subsites that are not shown automatically.
- Add frequently used libraries or folders to Favorites.
- Rename Favorites to use friendly names that match your daily workflow.

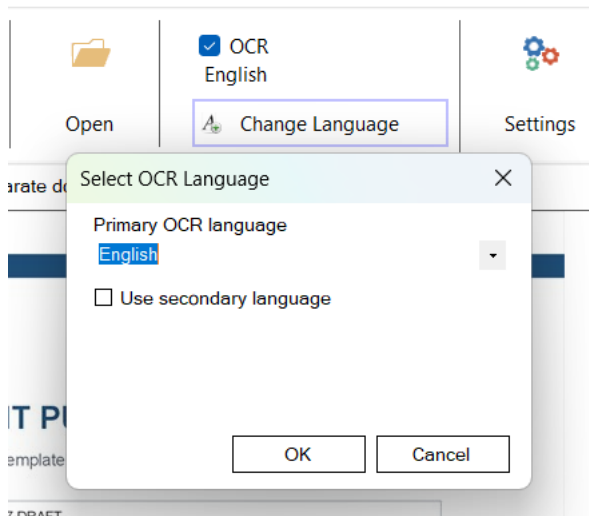
7. OCR: Create Searchable PDFs

OCR converts document images into searchable text. Use OCR when users need to search documents by content in SharePoint, find text inside a PDF, or copy text from a scanned document.

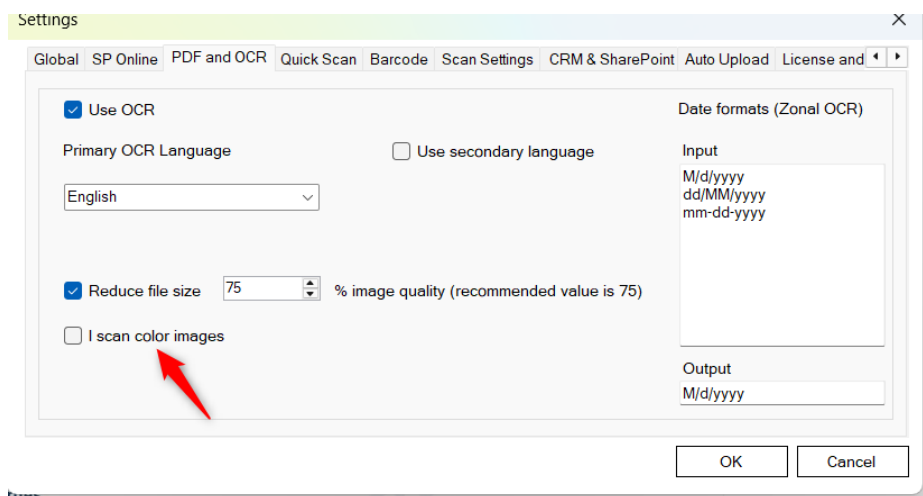
OCR Language Packs

Scan, PDF and OCR for SharePoint is installed with English OCR support only. If you need OCR for another language, ask your administrator to download the required OCR Language Pack from <https://www.websio.com/ocrlangpacks.aspx> and install it on the workstation. The Websio language-pack page states that the English OCR language pack is already included in the product install set and usually does not need to be downloaded separately. To install an additional pack, download the required ZIP file, extract it, and place the extracted language files in 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. Restart eDocStation after the files are copied, then select the required language in the OCR settings.

1. Scan or import the document pages.
2. Select the OCR option.
3. Choose the document language. Use a second language only when the document is truly bilingual.



4. For color originals, enable the color-image OCR option in settings.



5. Save the document. OCR runs during the save process and may take longer for large or low-quality documents.

OCR quality

Best OCR results usually come from clean grayscale scans at 300 dpi. Unusual fonts, poor contrast, handwriting, skewed pages, and low-resolution images can reduce recognition quality.

8. Document Separator Sheets

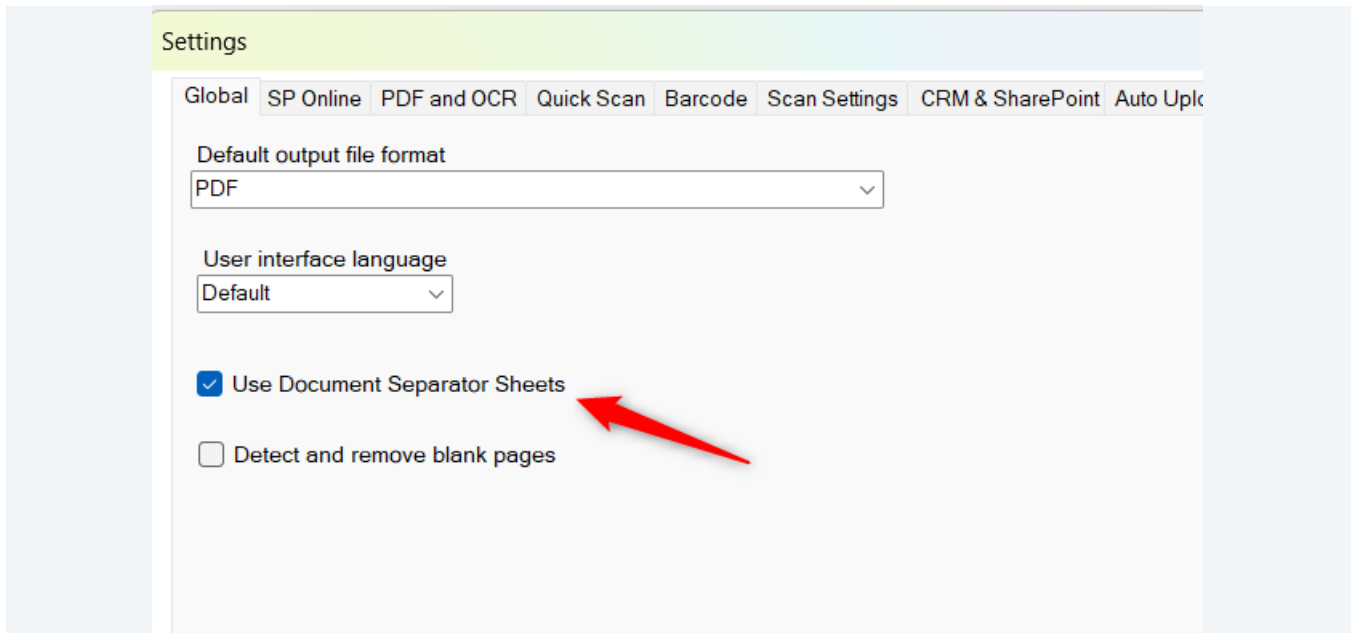
Document separator sheets let one scanner batch become multiple SharePoint documents. The separator page tells eDocStation where a new document starts.

1. Open the separator sheet from <eDocStation Installation directory>\separator
2. Print the separator sheet in A4 format with good print quality.
3. Place a separator sheet between documents in the scanner feeder.
4. Enable Use Document Separator Sheets in eDocStation settings if it is not already enabled.
5. Scan the full batch.
6. Review the split result before saving.



eDocStation Document Separator

<http://www.websio.com>

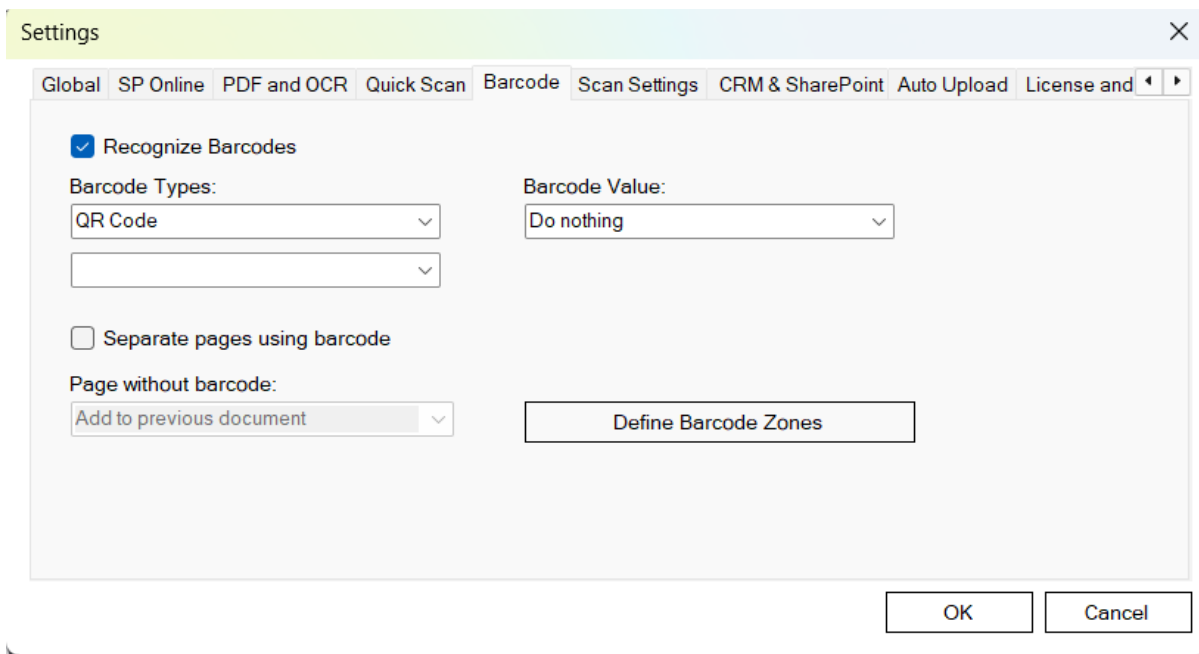


9. Barcode Recognition

Barcode recognition can read barcode values from scanned pages. Depending on your team setup, barcodes can be used to split a batch into documents or to fill a SharePoint property.

9.1 Turn Barcode Recognition On

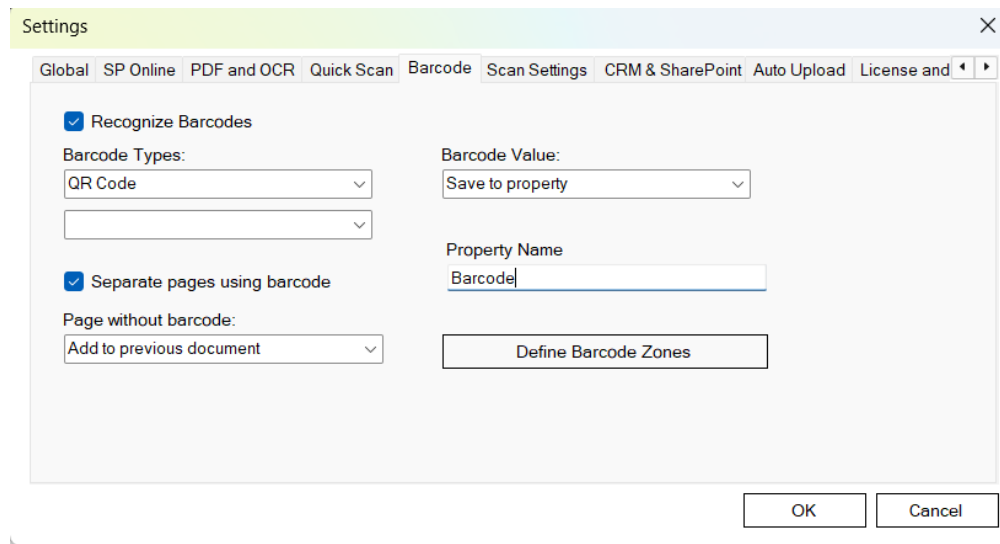
1. Open Settings.
2. Open the Barcode tab.
3. Enable Recognize barcodes.



4. Choose the barcode type used by your documents.

9.2 Split Documents by Barcode

- Use barcode-based separation when each new document begins with a barcode page.
- Decide what should happen to pages without barcodes, such as adding them to the previous document.
- Run a test with a small batch before processing a full stack.



The screenshot shows the 'Settings' window with the 'Barcode' tab selected. The window has a title bar with a close button (X) and a tab bar with the following tabs: Global, SP Online, PDF and OCR, Quick Scan, Barcode (selected), Scan Settings, CRM & SharePoint, Auto Upload, and License and... The main content area contains the following settings:

- ☒ Recognize Barcodes
 - Barcode Types: A dropdown menu with 'QR Code' selected and an empty dropdown below it.
 - Barcode Value: A dropdown menu with 'Save to property' selected.
 - Property Name: A text input field containing 'Barcode'.
- ☒ Separate pages using barcode
 - Page without barcode: A dropdown menu with 'Add to previous document' selected.
 - A button labeled 'Define Barcode Zones'.

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

9.3 Save Barcode Value to SharePoint Metadata

1. Confirm that the destination SharePoint library has a column for the barcode value. If not, ask your administrator or library owner.
2. Open Settings > Barcode.
3. Set Barcode Value to Save to SharePoint Property.
4. Enter or select the SharePoint property name.
5. Scan and save a test document.
6. Verify that the barcode value appears in the SharePoint library column.

9.4 Barcode Zones

Barcode zones can reduce recognition time by telling eDocStation where to look for the barcode. If no zones are defined, eDocStation searches the whole page.


1. Open Settings > Barcode.
2. Select Define barcode zones.
3. Load or scan a representative page.
4. Create a zone around the barcode area and test it
5. Add more zones only when needed.
6. Save the zones.

The eDocStation v. 2026.0.5 - Trial Version


Home Trial mode Barcode Zones

Create Zone Save Zones Cancel

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



Page 1



Demo Server Specification

Manufacturer: Websio Demo Systems
Model: WDS-2026-R2
The QR code contains the model number and manufacturer name


Identification

Specification Number	DEMO-SRV-2026-001
Serial Number	SN-DEMO-260520-001
Form Factor	2U rack server


Home Trial mode Barcode Zones

Create Zone Save Zones Cancel

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



Page 1



Demo Server Speci

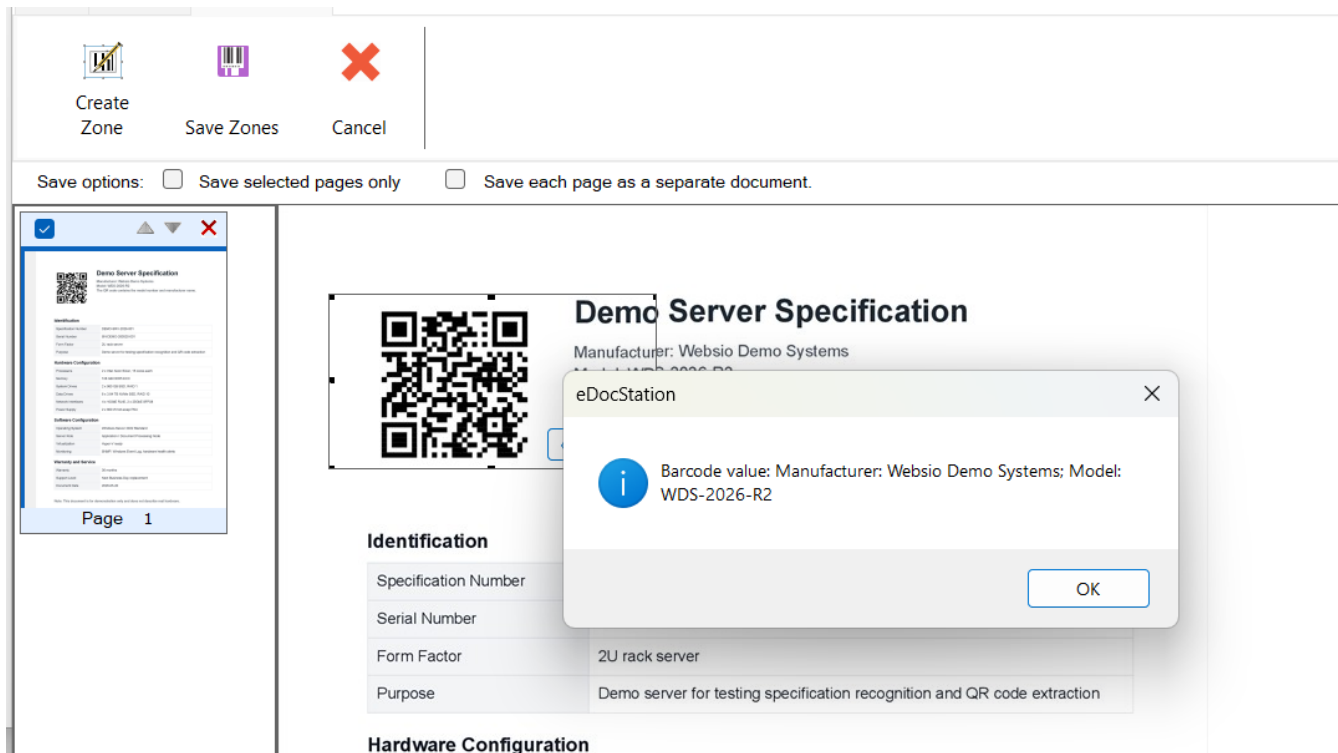
Manufacturer: Websio Demo Systems
Model: WDS-2026-R2
The QR code contains the model numb

Identification

Specification Number	DEMO-SRV-2026-001
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2

3



10. Properties Recognition - Zonal OCR

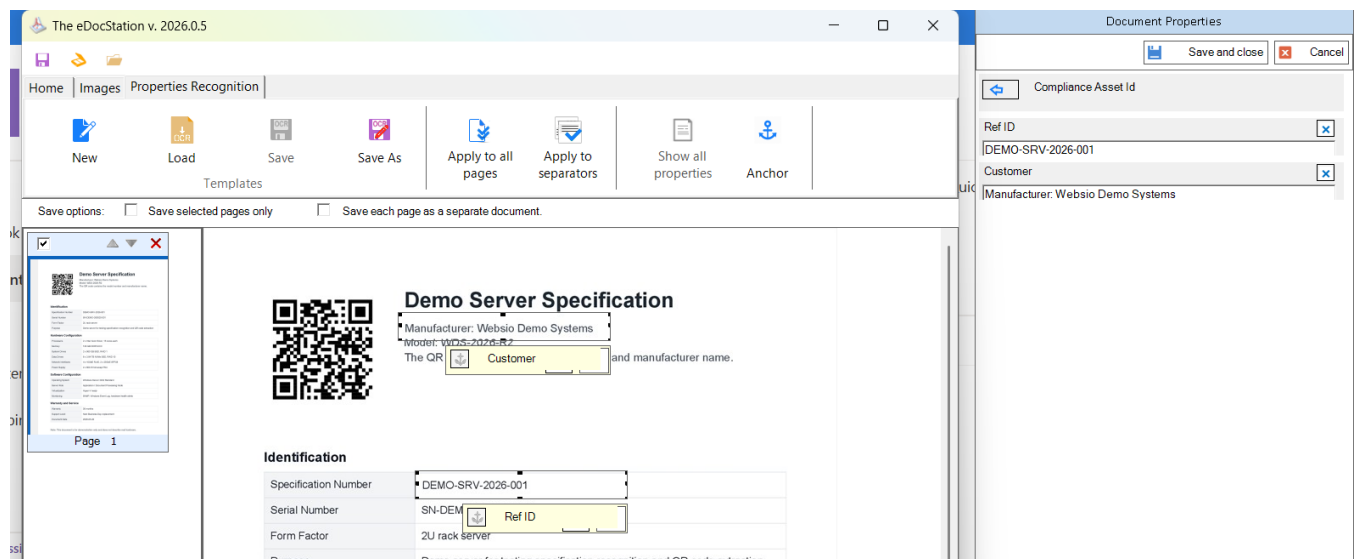
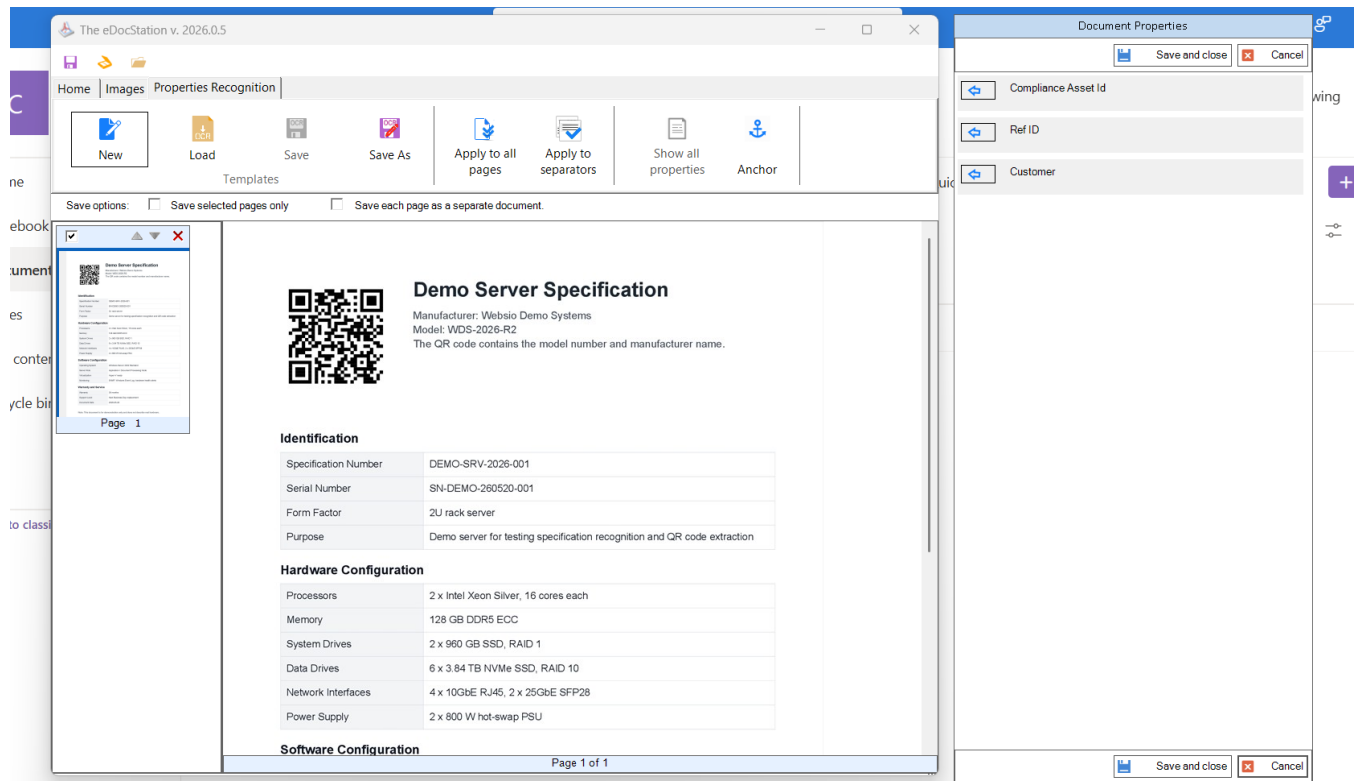
Properties Recognition, also called Zonal OCR, reads values from specific areas of a document image and can use those values as SharePoint metadata. Typical examples include order number, invoice number, customer name, date, amount, or barcode-adjacent text.

Library setup

Zonal OCR can only fill SharePoint columns that exist in the destination library and are supported by the product. If a required column is missing, ask the library owner or administrator to add it.

10.1 Manual Recognition

1. Scan or load the document.
2. Open the Properties Recognition tab.
3. Select New to display the document properties pane.
4. Drag a property placeholder from the pane to the matching area on the document image.
5. Resize the placeholder so it covers the target text.
6. Review the recognized value and correct it manually if needed.
7. Repeat for other properties.
8. Select Save and close, then save the document to SharePoint.





Home

Notebook

Documents

Pages

Site contents

Recycle bin

Edit

Documents

Add shortcut to OneDrive

Forms

Edit in grid view

Pin to Quick acc

All Documents

Name	Modified	Ref ID	Customer
Purchase Agreement.pdf	4 hours ago		
server spec.pdf	A few seconds ago	DEMO-SRV-2026-001	Manufacturer: Websio Demo Systems

10.2 Templates

Templates help reuse the same recognition zones for forms with a consistent layout.

Create a Template

1. Scan a representative document.
2. Place property placeholders as described in Manual Recognition.
3. Add one or two anchors. Choose unique text that appears reliably on the form.
4. Save the template with a meaningful name.

Use a Template

1. Scan or load a document that matches the template layout.
2. Open Properties Recognition.
3. Select Load and choose the template.
4. Review the automatically positioned placeholders.
5. Adjust placeholders or recognized values if needed.
6. Use Show all properties if the current library has additional properties that were not saved in the template.
7. Save properties and save the document.

11. Quick Scan

Quick Scan is useful for repeated scanning tasks with the same scanner, output format, destination, naming pattern, and optional metadata.

1. Open Settings > Quick Scan.
2. Set the file name prefix or automatic naming rule.
3. Choose whether Quick Scan saves to the file system or SharePoint by default.
4. Choose the default destination folder if your team uses a fixed destination.
5. Use Quick Scan & Save from the Home tab for repeated scanning.

Settings

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

File name prefix

☐ Always use auto-name ☐ Create document per page

"Quick Scan and Save" Button Action

☒ Save to File System ☐ Save to SharePoint

Save documents to directory:

12. User Settings Reference

12.1 Global Settings

Setting	What it controls
Default output file format	The default format used when saving new documents. PDF is the most common SharePoint format.
User interface language	The language used by eDocStation user interface.
Use Document Separator Sheets	Enables splitting batches by separator sheets.
Detect and remove blank pages	Removes blank pages automatically when scanning batches. Review results before relying on this for critical documents.

IMAGE PLACEHOLDER: Global settings tab

Screenshot to capture: Global settings with output format, interface language, separator sheets, and blank-page detection.

12.2 Scan Settings

Choose WIA or TWAIN in Settings > Scan Settings > Scan protocol. If the TWAIN dialog appears during scanning, remember that its options come from the scanner driver. Not every scanner has a TWAIN driver; WIA is supported by almost all Windows-compatible scanners. For device-specific options or the recommended protocol, use the scanner vendor documentation or ask IT which driver profile should be selected.

Setting	Guidance
Scan protocol	Use the default protocol unless scanning fails. If scanning freezes or errors, try the other protocol if available.
Show Select Scanner dialog	Enable when multiple scanners are used from one workstation.
Show parameters dialog before scan	Enable when users need to change feeder, color mode, or resolution often.
Source	Use feeder for batches and flatbed for fragile or single-page originals.
Output type	Use grayscale for OCR quality, black and white for small files, and color when color information is required.
Resolution	Use 300 dpi for most OCR documents.

Settings

Global

SP Online

PDF and OCR

Quick Scan

Barcode

Scan Settings

CRM & SharePoint

Auto Upload

License and

Scan Protocol

WIA

☒ Show "Select scanner" dialog

☒ Show parameters dialog

Source

Document Feeder

Output Type

Grayscale

Resolution

300

☐ TWAIN Log (system use only)

☐ Citrix TWAIN mode (system use only)

OK

Cancel

12.3 SharePoint Settings

SharePoint authentication and tenant identifiers are normally configured by the administrator. End users may use the options below only when instructed by support or the administrator.

- Clear previously saved user credentials when sign-in is stuck or the wrong user account is used.
- Display SharePoint Properties after upload when you need to fill metadata after saving from standalone eDocStation.
- Do not change Tenant ID, Client ID, or

13. Troubleshooting

Problem	What to try first	When to ask for help
Scan command is missing in SharePoint	Refresh the browser and confirm you are in a document library, not another SharePoint page.	Ask the administrator to verify that Scan, PDF and OCR is enabled in the tenant App Catalog and available as a tenant-wide extension.
Browser does not open eDocStation	Allow the browser prompt to open the edoc: protocol. Confirm eDocStation is installed.	Ask the administrator to verify the protocol handler and workstation installation.
eDocStation opens but scanner is missing	Check scanner power, USB/network connection, and Windows scanner availability.	Ask IT to reinstall or update the scanner driver.
Scan freezes or fails	Try a smaller batch and change scan protocol in Scan Settings if available.	Ask support or IT if the scanner fails in Windows scanning tools too.
OCR quality is poor	Use 300 dpi grayscale, choose the correct language, and improve original image quality.	Ask whether additional OCR language packs are installed.
Upload fails	Confirm you can upload a normal file to the same SharePoint library in the browser.	Ask the administrator to check authentication, permissions, required metadata, and logs.
Required SharePoint property is missing	Refresh the Save to SharePoint dialog or reopen the library.	Ask the library owner to confirm column setup and permissions.
Wrong account is used	Clear saved credentials in SharePoint settings if available, then sign in again.	Ask administrator/support before changing authentication mode.

14. Reference

- Scan PDF and OCR for SharePoint - Administrator Guide.docx: deployment, Entra registration, authentication policy, and workstation rollout.
- Tesseract OCR engine: used for optical character recognition.
- iTextSharp library: used for PDF creation.