

User Manual

Printed copy for reference only. For the most up-to-date information, please refer to the online help.

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Getting Started

Overview of Dispatcher Phoenix

This topic provides an overview of **Dispatcher™ Phoenix**, Konica Minolta's advanced workflow automation product line. Dispatcher Phoenix is available in the following configurations:

- **Dispatcher Phoenix** The base license containing a full and diverse set of features. The Dispatcher Phoenix base license can be upgraded by the purchase of **optional add-in nodes** and/or **vertical market packages**.
- **Dispatcher Phoenix ScanTrip** Dispatcher Phoenix's simplified scan-to-cloud solution, with OCR capabilities and the option to upgrade to Dispatcher Phoenix.
- Dispatcher Phoenix Release2Me+ Dispatcher Phoenix's solution for secure print release and scanning. Includes the following:
 - Release2Me secure print release system
 - Web-based print reporting
 - · Print delegation
 - · A variety of connectors that can be easily accessed at the MFP panel
 - · Much more

Note: Dispatcher Phoenix is included as part of the Dispatcher Suite.

The differences in the packages consist of the *nodes* that come with each package. Nodes are described below. Dispatcher Phoenix's core functionality includes the following:

- Workflow Builder A graphical user interface used to create and customize workflows.
- Nodes Each node performs a function you can configure in a Dispatcher Phoenix workflow to collect, process, or distribute files. Examples of nodes are Dropbox In, Rename, and Dropbox Connector.
- Sample Workflows A set of pre-configured workflows designed to get you up and running quickly and illustrate the power of Dispatcher Phoenix workflows and the available nodes.
- Workflow Scheduler A tool you can use to define when to run your workflows.
- Index Form Builder A tool you can use to create interactive forms for use at the MFP panel. Includes support for folder browsing and document indexing.
- Log Viewer A tool you can use to view the activity log for a selected workflow.
- Authentication options A robust selection of options, including support for CAC/PIV authentication.
- Dispatcher Phoenix Web user interface An intuitive web user interface that provides easy access to additional advanced features and tools.
 Dispatcher Phoenix also offers a web client for access to other important features for the enterprise, including workflow sharing, workflow control, cluster management, and analytics.
- · Add In Manager A hub where you can add optional nodes and services to the application at any time.

Dispatcher Phoenix Workflows and Nodes

Dispatcher Phoenix manages and automates document imaging, printing, and routing tasks through the use of its unique **Workflow Builder**. This intuitive graphical user interface enables users to easily create and customize workflows to meet any business need.

Dispatcher Phoenix workflows receive, process, and distribute files through the use of nodes. Dispatcher Phoenix groups nodes into three types:

- Collection nodes are monitored and used as input for a workflow. Collection nodes can receive files for processing/distribution from many different sources, such as the following:
 - o Directly from an MFP interface panel or web browser
 - · File folders in a local or network directory
 - Email inbox
 - More
- Process nodes are automated file manipulation tasks that process files according to user-defined specifications.
- **Distribution nodes** are the output locations for the workflow. After processing, these nodes distribute files to user-defined locations such as the following:
 - · Another local or network directory
 - · A cloud application

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- · An email recipient
- A document management system
- More

Getting Dispatcher Phoenix Up and Running

The following topics are available to help you get Dispatcher Phoenix up and running:

- · Hardware and software requirements
- Installation
- Product registration
- · Installing Dispatcher Phoenix on an MFP

Dispatcher Phoenix Licenses

Dispatcher Phoenix is available for purchase in several different configurations, each targeting the needs of a particular user group.

- Dispatcher Phoenix The base license.
- **Dispatcher Phoenix ScanTrip** Dispatcher Phoenix's simplified scan-to-cloud solution, with OCR capabilities and the option to upgrade to Dispatcher Phoenix.
- Dispatcher Phoenix Release2Me+ Dispatcher Phoenix's solution for secure print release and scanning.

Each purchase includes one active input with no limits on page volume processing. Maintenance packages must be purchased separately. ScanTrip and Release2Me+ contain a reduced number of workflow nodes but at significantly reduced prices.

Dispatcher Phoenix Base Nodes

The following sections list the nodes included in the Dispatcher Phoenix base license, grouped by node type.

Collection Nodes

Node	Description
Dispatcher Stratus In	Allows Dispatcher Phoenix to accepts documents and data from a connected Dispatcher Stratus tenant.
DP Mobile	Collects files that have been submitted from a mobile device.
Dropbox In	Collects files from a Dropbox folder.
FTP In	Collects files from a monitored FTP server at regular intervals.
Input Folder	Collects files from a directory or folder on your PC or network.
LPR In	Collects print jobs from an LPR Client like the Windows Printer Queue.
Microsoft Teams In	Collects messages and attachments from a connected Microsoft Teams channel.
MFP Panel	Initiates workflows directly from a Konica Minolta MFP panel.
MFP User Box	Collects files for processing from a User box on a KMBS MFP.
Web Capture	Captures files that have been submitted from a device via a web browser.

Note: The **Dispatcher Pro Port** is not represented as an icon you can drag-drop onto the Workflow Builder work area. Instead, you can configure the Dispatcher Pro Port for use in other applications (such as Microsoft Word) as a direct print-to-file printer, which you can then use as an input into a Dispatcher Phoenix workflow.

Process Nodes

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Node	Description
2D Barcode Processing with ZXing	Scan documents and extract data from a variety of 2D barcodes.
Annotate	Annotates scanned image files with the date received, a counter sequence number, or text of your choice, in a specific location on the page.
Advanced OCR with Tesseract	Refines optical character recognition (OCR) output and extracts metadata through the use of user-defined or auto-detected zones. Includes the Tesseract OCR engine .
Barcode Processing with ZXing	Scan documents and extract data from a variety of barcodes.
Color Route	Routes files based on the number or percentage of color pages in a document.
Convert to PDF with Tesseract	Converts any image file to a PDF document, including options for creating PDF/A compliant documents and PDF Searchable files. Includes the Tesseract OCR engine .
Convert to PS	Converts image files to PostScript format.
Deskew	Straightens skewed images. Be aware that the more accuracy you request from the deskew process, the longer the file will take to process.
Despeckle	Removes speckles from a scanned image. Caution needs to be taken so the speckles are removed but the image is not distorted.
Insert	Inserts a string as part of the workflow, without requiring a parse process.
Merge	Combines single images into large image files, based on the number of files set. Merges both images and PDF files.
Metadata Route	Routes documents according to user-defined, metadata-based search rules.
Metadata Scripting	Manipulates metadata (copy, add, modify, or remove).
Metadata to File	Extracts metadata from incoming files and stores that information in a separate file.
Mirror Image	Reverses images (either horizontally or vertically).
Negative Image	Creates a negative of an incoming document (i.e., converts light area to dark and vice versa).
ODBC	Retrieves data from or updates data in an ODBC (Open Database Connectivity) data source.
Page Count Route	Routes files based on the total number of pages in a document.
Parse & Distribute	Searches for a keyword or text string within a file.
Parse & Insert	Inserts a text string after the object of a search has been found.
Parse & Replace	Replaces text found by a search rule.
Parser	Creates a Search rule to search file attributes such as name, file type or size
PDF Data Extraction	Extracts metadata, such as form values, from PDF forms.
PJL Print Preferences	Allows users to specify/configure printing preferences for print jobs, either automatically or at the MFP. The PJL Print Preferences node is included with the Release2Me package.
Print to File	Converts documents to PRN format so you can print to a file and print using the associated Windows application.
Rename	Changes the file name using variables, counters, or static text.
Split	Separates multi-page files based on user-specified page numbers or metadata conditions.
Watermark	Overlays a designated opaque image, such as a company logo, on an image file.

Distribution Nodes

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Node	Description
Box Connector	Scans, indexes, and distributes files to Box.com at the MFP or via an automated workflow.
Cloud Fax Connector	Distributes documents to the Upland InterFAX cloud-based fax service. Only available with Dispatcher Paragon .
Dispatcher Stratus Connector	Allows customers to distribute documents and data to a connected Dispatcher Stratus tenant.
Dropbox Connector	Scans, indexes, and distributes files to Dropbox at the MFP or via an automated workflow.
Email Out	Sends output files as email attachments.
FileAssist Connector	Scans, processes, and distributes files to Konica Minolta's FileAssist cloud storage service at the MFP or via an automated workflow.
FilesAnywhere Connector	Scans, processes, and distributes files to FilesAnywhere at the MFP or via an automated workflow.
FTP	Distributes to a directory on an FTP server.
Google Drive Connector	Scans, processes, and distributes to Google Drive at the MFP or via an automated workflow.
Microsoft Exchange	Sends output files as email attachments via Microsoft Exchange.
Microsoft Teams Connector	Sends messages and attachments to a connected Microsoft Teams channel.
OneDrive Connector	Scans, processes, and distributes files to Microsoft OneDrive at the MFP or via an automated workflow.
OneDrive for Business	Scans, processes, and distributes files to Microsoft OneDrive for Business at the MFP or via an automated workflow.
Output Folder	Distributes to a directory or folder on your PC or network.
Printer	Distributes to a KMBS MFP for printing the output.
SFTP Out	Distributes documents to SFTP (SSH File Transfer Protocol) servers.
SharePoint Connector	Connects to Microsoft SharePoint, browses through SharePoint folders, and uploads documents to SharePoint repositories.
SharePoint Online Connector	Connects to Microsoft SharePoint Online, browses through SharePoint Online folders, and uploads documents to SharePoint Online repositories.
WebDAV Connector	Scans, indexes, and distributes files to a generic WebDAV Server at the MFP or via an automated workflow.

Note: The Cloud Fax Connector is included in the base Dispatcher Phoenix license but must be downloaded separately.

Dispatcher Phoenix ScanTrip

Dispatcher Phoenix ScanTrip is a simplified scan-to-cloud with OCR solution that provides a low-cost alternative to **Dispatcher Phoenix**. Benefits of ScanTrip include:

- Easy integration with print management solutions that don't include scanning features.
- $\bullet \ \ {\sf Connectors} \ {\sf to} \ {\sf popular} \ {\sf cloud} \ {\sf applications} \ {\sf such} \ {\sf as} \ {\sf Box}, \ {\sf Dropbox}, \ {\sf OneDrive}, \ {\sf Google} \ {\sf Drive}, \ {\sf etc}.$
- $\bullet\,$ The option to upgrade to Dispatcher Phoenix.

ScanTrip can be used in the following workflows:

- Scan to Me
- Scan To Home
- Scan to Folder
- Scan to Email (SMTP and MS Exchange)
- Scan to Cloud Apps
- Scan/submit files via Web Browser

ScanTrip Configuration

ScanTrip includes the following features and functions of Dispatcher Phoenix:

- Client Application
- Workflow Builder

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• Sample Workflows - A set of pre-configured workflows designed to get you up and running quickly and illustrate the power of Dispatcher Phoenix workflows and the available nodes.

ScanTrip includes the following nodes:

Collection Nodes

Node	Description
Dispatcher Stratus In	Allows Dispatcher Phoenix to accepts documents and data from a connected Dispatcher Stratus tenant.
MFP Panel	Initiates workflows directly from a Konica Minolta MFP panel.
Microsoft Teams In	Collects messages and attachments from a connected Microsoft Teams channel.
Web Capture	Captures files that have been submitted from a device via a web browser.

Process Nodes

Node	Description
Advanced OCR with Tesseract	Refines optical character recognition (OCR) output and extracts metadata through the use of user-defined or auto-detected zones. Includes the Tesseract OCR engine .
Metadata Route	Routes documents according to user-defined, metadata-based search rules.
Metadata to File	Extracts metadata from incoming files and stores that information in a separate file.
Rename	Changes the file name using variables, counters, or static text.

Distribution Nodes

Node	Description
Box Connector	Scans, indexes, and distributes files to Box at the MFP or via an automated workflow.
Cloud Fax Connector	Distributes documents to the Upland InterFAX cloud-based fax service. Only available with Dispatcher Paragon .
Dispatcher Stratus Connector	Allows customers to distribute documents and data to a connected Dispatcher Stratus tenant.
Dropbox Connector	Scans, indexes, and distributes files to Dropbox at the MFP or via an automated workflow.
FileAssist Connector	Scans, processes, and distributes files to Konica Minolta's FileAssist cloud storage service at the MFP or via an automated workflow.
FilesAnywhere Connector	Scans, processes, and distributes files to FilesAnywhere at the MFP or via an automated workflow.
Google Drive Connector	Scans, processes, and distributes files to Google Drive at the MFP or via an automated workflow.
Microsoft Exchange	Sends output files as email attachments via Microsoft Exchange.
Microsoft Teams Connector	Sends messages and attachments to a connected Microsoft Teams channel.
OneDrive Connector	Scans, processes, and distributes files to Microsoft OneDrive at the MFP or via an automated workflow.
OneDrive for Business	Scans, processes, and distributes files to Microsoft OneDrive for Business at the MFP or via an automated workflow.
Output Folder	Distributes to a directory or folder on your PC or network.
SharePoint Connector	Connects to Microsoft SharePoint, browses through SharePoint folders, and uploads documents to SharePoint repositories.
SharePoint Online Connector	Connects to Microsoft SharePoint Online, browses through SharePoint Online folders, and uploads documents to SharePoint Online repositories.
Email Out	Sends output files as email attachments.
WebDAV Connector	Scans, indexes, and distributes files to a generic WebDAV Server at the MFP or via an automated workflow.

Note: The Cloud Fax Connector is included in the base Dispatcher Phoenix ScanTrip license but must be downloaded separately.

Dispatcher Phoenix Release2Me+

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Dispatcher Phoenix Release2Me+ is a lean, economical alternative to full-featured print management solutions you can use for secure printing and scanning. This convenient, secure print solution protects the confidentiality of your business documents and reduces unwanted, unnecessary printing.

Note: For customers who require advanced workflow capabilities, **Release2Me node** device licenses are available as optional add-ins to the Dispatcher Phoenix base license.

Dispatcher Phoenix Release2Me+ Configuration

Dispatcher Phoenix Release2Me+ includes the following features:

- · Secure print release
- · Print reporting
- Print delegation
- Dispatcher Phoenix Release2Me Driver
- All ScanTrip functionality

System Workflows

Workflow	Description
Release2Me System Workflow	Easy-to-use print release solution with System Editor.

Collection Nodes

Node	Description
Dispatcher Stratus In	Collects files and metadata from a connected Dispatcher Stratus workflow.
LPR In	Collects print jobs from an LPR Client like the Windows Printer Queue.
MFP Panel	Initiates workflows directly from a Konica Minolta MFP panel.
Microsoft Teams In	Collects messages and attachments from a connected Microsoft Teams channel.
Web Capture	Captures files that have been submitted from a device via a web browser.

Process Nodes

Node	Description
Advanced OCR with Tesseract	Refines optical character recognition (OCR) output and extracts metadata through the use of user-defined or auto- detected zones. Includes the Tesseract OCR engine .
Metadata Route	Routes documents according to user-defined, metadata-based search rules.
Metadata to File	Extracts metadata from incoming files and stores that information in a separate file.
PJL Print Preferences	Allows users to specify/configure printing preferences for print jobs, either automatically or at the MFP. The PJL Print Preferences node is included with the Release2Me package.
Release2Me	Provides the ability to print jobs to a queue to be accessed later at an MFP for a secure and convenient print release system.
Rename	Changes the file name using variables, counters, or static text.

Distribution Nodes

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Node	Description
Box Connector	Scans, indexes, and distributes files to Box.com at the MFP or via an automated workflow.
Dispatcher Stratus Connector	Allows customers to distribute documents and data to a connected Dispatcher Stratus tenant.
Dropbox Connector	Scans, indexes, and distributes files to Dropbox at the MFP or via an automated workflow.
FileAssist Connector	Scans, processes, and distributes files to Konica Minolta's FileAssist cloud storage service at the MFP or via an automated workflow.
FilesAnywhere Connector	Scans, processes, and distributes files to FilesAnywhere at the MFP or via an automated workflow.
Google Drive Connector	Scans, processes, and distributes to Google Drive at the MFP or via an automated workflow.
Microsoft Exchange	Sends output files as email attachments via Microsoft Exchange.
Microsoft Teams Connector	Sends messages and attachments to a connected Microsoft Teams channel.
OneDrive Connector	Scans, processes, and distributes files to Microsoft OneDrive at the MFP or via an automated workflow.
OneDrive for Business	Scans, processes, and distributes files to Microsoft OneDrive for Business at the MFP or via an automated workflow.
Output Folder	Distributes to a directory or folder on your PC or network.
Printer	Distributes to a KMBS MFP for printing the output.
SharePoint Connector	Connects to Microsoft SharePoint, browses through SharePoint folders, and uploads documents to SharePoint repositories.
SharePoint Online Connector	Connects to Microsoft SharePoint Online, browses through SharePoint Online folders, and uploads documents to SharePoint Online repositories.
Email Out	Sends output files as email attachments.
WebDAV Connector	Scans, indexes, and distributes files to a generic WebDAV Server at the MFP or via an automated workflow.

Optional Nodes (Add-Ins)

Dispatcher Phoenix includes a robust set of collection, processing, and distribution **nodes**. You can expand and enhance the power and functionality of Dispatcher Phoenix through the addition of **Optional Add-In Nodes** and **Node Bundles** using the **Add In Manager**. The available options are listed below.

Note: The expansion options described in this topic are available only for the Dispatcher Phoenix base license. They are not available for **Dispatcher Phoenix ScanTrip** or **Dispatcher Phoenix Release2Me+**. Many add-in nodes and node bundles listed here are also available via the **Dispatcher Phoenix Vertical Market Packages**.

Optional Nodes (Add-Ins)

The following lists the Optional Add-In Nodes that are available for use with the Dispatcher Phoenix base license. Nodes may only be available as part of a bundle; for full details, see the **Dispatcher Phoenix Optional Add-In Bundles** section below.

COLLECTION NODES (OPTIONAL)

Node	Description
DSP Local In	Allows Dispatcher Phoenix to accept documents from custom-built local executables.
DSP Web In	Allows Dispatcher Phoenix to accept documents from custom-built web applications.
Email In	Collects emails from folder(s) or an inbox on an email server.
HTTP In	Receives files that are uploaded through a web service.
JDF Converter	Parses information from JDF file.
SMTP In	Receives emails sent from an MFP.
Upland InterFAX In	Collects faxes from a connected Upland InterFAX account.
Workstation	Allows a scan operator to import images from high-speed scanners (and other sources) for page/document manipulation, reordering, etc.

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PROCESS NODES (OPTIONAL)

Node	Description
Advanced Bates Stamp	Places an unlimited number of Bates stamps on scanned image files and PDFs.
2D Barcode Processing with OmniPage	Recognizes and extracts information from two-dimensional barcodes on scanned documents through the use of user-defined zones. Includes the OmniPage OCR engine .
Barcode Processing with OmniPage	Recognizes and extracts information from barcodes on scanned documents through the use of user-defined zones. Includes the Barcode Writer node, which automatically applies barcodes to incoming documents. Also includes the OmniPage OCR engine .
Barcode Writer	Inserts barcodes and barcode labels into incoming documents.
Batch Indexing	Allows an index operator to enter/assign metadata to documents (either manually or automatically) via Dispatcher Phoenix Web.
Bubble Grader	Automatically grades OMR bubble sheet tests and generates analytical reports.
Bubble Sheet Generator	Tool to generate bubble sheet answer keys and student answer sheets.
CDA Generator	Converts patient records and other healthcare documents into standard HL7 CDA XML format for import into a major medical system, such as an EHR.
Convert to Office with OmniPage	Converts image files and PDFs to standard Microsoft Office documents, such as Word, Excel, and PowerPoint. Includes the OmniPage OCR engine .
Copy Defender	Applies Konica Minolta Copy Protection features to documents.
Doc-Classifier with OmniPage	Automatically categorizes scanned documents into pre-defined classes. Includes the OmniPage OCR engine .
DSP Local	Allows Dispatcher Phoenix to integrate with custom-built local executables.
DSP Web	Allows Dispatcher Phoenix to integrate with custom-built web applications.
Email Parser	Extracts email attachments, parses the header metadata of emails, and routes emails based on set conditions.
Forms Processing	Extracts and processes data using pattern matching technology. Includes the OmniPage OCR engine and Tesseract OCR engine .
Highlight/Strikeout with OmniPage	Highlights important information or marks text with strikethrough lines, based on user-specified search conditions. Includes the OmniPage OCR engine .
HL7 Parser	Extracts and processes data and embedded documents from HL7 messages.
KDK Code Generator	Adds Kodak KDK/KDE PDL commands to PDF or Postscript files to facilitate printing on a Kodak Digimaster.
KDK-PDL Converter	Promotes communication between Konica Minolta and Kodak printers by converting Konica Minolta PDL commands to Kodak KDK/KDE PDL commands or Kodak KDK/KDE PDL to Konica Minolta PDL.
OmniPage for Advanced OCR	Enables the OmniPage OCR engine in the Advanced OCR node.
OmniPage for Convert to PDF	Enables the OmniPage OCR engine in the Convert to PDF node.
Redact with OmniPage	Blacks out sensitive information from scanned image files, based on search conditions. Includes the OmniPage OCR engine .
Release2Me	Provides the ability to print jobs to a queue to be accessed later at an MFP for a secure and convenient print release system.
Rx Shield	Applies tamper-resistant features to incoming prescriptions.
Verification	Allows an operator to verify documents for quality assurance via Dispatcher Phoenix Web .

SERVICES (OPTIONAL)

Node	Description
SMTP Manager	Allows administrative users to configure the SMTP Service, which receives email over SMTP and submits them to the workflow services.

DISTRIBUTION NODES (OPTIONAL)

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Node	Description
Cloud Fax Connector	Allows customers with Dispatcher ScanTrip and Dispatcher Paragon to connect to the Upland InterFAX cloud-based fax system
DocRecord Connector	Allows customers with Dispatcher Phoenix to distribute document to a DocRecord server.
DocuSign Connector	Allows customers with Dispatcher Phoenix to distribute documents to DocuSign for further processing.
DSP Local Out	Allows Dispatcher Phoenix to distribute documents to customized outputs via local executables.
DSP Web Out	Allows Dispatcher Phoenix to distribute documents to customized outputs via web applications.
Guardian Connector	Distributes scanned I-9 documents to the LawLogix Guardian platform at the MFP.
HL7 Connector	Sends patient documents to 3rd party systems, such as Electronic Health Records, in the standard HL7 message format.
HTTP Out	Uploads the input file to specified URL.
Laserfiche Connector	Distributes processed documents into a monitored folder for collection by Laserfiche's content management system.
M-Files Connector	Scans, indexes, and distributes files to M-Files at the MFP or via an automated workflow.
OnBase Connector	Scans, indexes, and uploads documents to OnBase Content Manage System at the MFP or via an automated workflow.
Rightfax Connector	Scans, indexes, and uploads documents to a Rightfax server.
Square 9 Softworks Connector	Scans, indexes, and uploads documents to a Square 9 server.
Upland InterFAX Connector	Scans, indexes, and distributes files to Upland's InterFAX digital fax service.
Windows Fax Connector	Scans, indexes, and distributes files via a local fax modem or fax server.
Workshare Connector	Scans, processes, and distributes files to Workshare at the MFP or via an automated workflow.
Worldox Connector	Scans, indexes, and distributes files to Worldox Document Management System at the MFP or via an automated workflow.

SYSTEM WORKFLOWS (OPTIONAL)

System Workflow	Description
Release2Me System Workflow	Easy-to-use print release solution with System Editor. This System Workflow is included with the Release2Me package.

Dispatcher Phoenix Optional Add-In Bundles

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Bundle Name	Nodes Included	Included in the following packages
Barcode Processing	Barcode Processing Barcode Writer	Dispatcher Phoenix ECM Dispatcher Phoenix Finance Dispatcher Phoenix Government Dispatcher Phoenix Healthcare
Batch Indexing Package	Batch Indexing Batch Manager Reports Verification	Dispatcher Phoenix ECM
DSP Bundle	DSP Local In DSP Web In DSP Local DSP Web DSP Local Out DSP Web Out	None
Email Bundle	Email In Email Parser SMTP In	Dispatcher Phoenix ECM Dispatcher Phoenix Healthcare
HL7 Bundle	CDA Generator HL7 Connector HL7 Parser	Dispatcher Phoenix Healthcare
KDK Bundle	KDK Code Generator KDK-PDL Converter	None
PDF Processing Bundle	Crop PDF Pages Delete PDF Pages Duplicate PDF Pages Insert PDF Pages Move PDF Pages Shift PDF Pages Resize PDF Pages Rotate PDF Pages	None
Redact & Highlight/Strikeout Bundle	Highlight/Strikeout Redact	Dispatcher Phoenix ECM Dispatcher Phoenix Education Dispatcher Phoenix Finance Dispatcher Phoenix Government Dispatcher Phoenix Healthcare Dispatcher Phoenix Legal
Release2Me License	Dispatcher Phoenix Release2Me Driver Release2Me Node Release2Me System Workflow	Dispatcher Phoenix ECM Dispatcher Phoenix Release2Me+
Upland InterFAX Bundle	Upland InterFAX In Upland InterFAX Connector	None

Note: The nodes included in the Dispatcher Phoenix Optional Add-In Bundles are not available for individual purchase; they can **only** be purchased in the bundle.

Vertical Market Optional Packages

Dispatcher Phoenix includes a robust set of collection, processing, and distribution **nodes**. You can expand and enhance the power and functionality of Dispatcher Phoenix through the addition of one or more Dispatcher Phoenix vertical market packages using the **Add In Manager**. The available options are listed below.

Note: The expansion options described in this topic are available only for the Dispatcher Phoenix base license. They are not available for **Dispatcher Phoenix ScanTrip** or **Dispatcher Phoenix Release2Me+**. Many add-in nodes and node bundles listed here are also available via the **Dispatcher Phoenix Vertical Market Packages** listed below.

If you purchase the Dispatcher Phoenix base license, you can add one or more of the following optional vertical-market packages:

- Dispatcher Phoenix Legal
- Dispatcher Phoenix Healthcare
- Dispatcher Phoenix Education
- Dispatcher Phoenix Finance

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- · Dispatcher Phoenix Government
- · Dispatcher Phoenix Office
- Dispatcher Phoenix ECM

Legal Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Tailored to meet the needs of the legal industry, Dispatcher Phoenix Legal includes document processes most often used in law firms. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Legal includes the following nodes:

Process Nodes

- · Advanced Bates Stamp
- · Convert to PDF with OmniPage
- · Highlight/Strikeout with OmniPage
- · Redact with OmniPage

Distribution Nodes

• Guardian Connector

Healthcare Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix Healthcare is targeted at health care professionals. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Healthcare includes the following nodes:

Collection Nodes

- Email In
- SMTP In

Process Nodes

- · Advanced OCR with OmniPage
- Barcode Processing with OmniPage Includes the Barcode Generator
- 2D Barcode Processing with OmniPage
- Barcode Writer
- CDA Generator
- Convert to PDF with OmniPage
- · Convert to Office with OmniPage
- Email Parser
- · Highlight/Strikeout with OmniPage
- HL7 Parser
- Redact with OmniPage
- Rx Shield

Distribution Nodes

- OnBase Connector
- HL7 Connector

Education Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix Education is targeted at education professionals. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Education includes the following nodes:

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Process Nodes

- · Advanced OCR with OmniPage
- Bubble Grader includes the Bubble Sheet Generator Tool
- Convert to PDF with OmniPage
- Convert to Office with OmniPage
- · Highlight/Strikeout with OmniPage
- · Redact with OmniPage

Finance Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix Finance is targeted at financial services firms such as banks, credit unions, and accounting firms. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Finance includes the following nodes:

Process Nodes

- · 2D Barcode Processing with OmniPage
- · Advanced OCR with OmniPage
- Barcode Processing with OmniPage comes with the Barcode Generator
- Barcode Writer
- · Convert to PDF with OmniPage
- · Convert to Office with OmniPage
- · Highlight/Strikeout with OmniPage
- · Redact with OmniPage

Government Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix Government is designed to streamline document processing for state and federal agencies. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Government includes the following nodes:

Process Nodes

- · Advanced OCR with OmniPage
- Barcode Processing with OmniPage comes with the Barcode Generator
- Barcode Writer
- Convert to PDF with OmniPage
- Convert to Office with OmniPage
- Copy Defender
- · Highlight/Strikeout with OmniPage
- · Redact with OmniPage

Distribution Nodes

• Laserfiche Connector

Office Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix Office is an ideal solution for general office users. In addition to all nodes included in Dispatcher Phoenix, Dispatcher Phoenix Office includes the following nodes:

Process Nodes

· Advanced OCR with OmniPage

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- · Convert to PDF with OmniPage
- · Convert to Office with OmniPage

Dispatcher Phoenix Office also includes the Asian Font Pack.

ECM Optional Package

If you purchase the **Dispatcher Phoenix base license**, you can add this optional package. Dispatcher Phoenix ECM includes all the features/functions in Dispatcher Phoenix, as well as additional user licenses and extensive add-ins including the following:

Collection Nodes

- Email In
- SMTP In
- Workstation

Process Nodes

- Advanced Bates Stamp
- · Advanced OCR with OmniPage
- Barcode Processing with OmniPage Includes the Barcode Generator
- 2D Barcode Processing with OmniPage
- Barcode Writer
- · Batch Indexing
- · Convert to PDF with OmniPage
- · Convert to Office with OmniPage
- Copy Defender
- Email Parser
- Forms Processing Includes the OmniPage OCR engine and Tesseract OCR engine.
- · Highlight/Strikeout with OmniPage
- Redact with OmniPage
- Release2Me

System Workflows

• Release2Me System Workflow

Distribution Nodes

OnBase Connector

DP Web Tools

- Batch Indexing
- Batch Manager
- ECM Reports
- Release2Me Print Delegation
- · Release2Me Reports
- Verification

Additional Licenses

The following licenses are included in the ECM package:

• Batch Indexing (1)

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- Dispatcher Phoenix Mobile (10)
- Release2Me Device (3)
- Workstation (1)

Requirements

Operating Systems

Dispatcher Phoenix is designed to work on the following platforms:

- Windows Server 2022
- Windows Server 2019
- Windows Server 2016*
- Windows 11
- Windows 10*

/* Operating systems are in late long-term support and are no longer part of the common test procedures associated with new Dispatcher Phoenix releases. If you experience issues with Dispatcher Phoenix on one of these operating systems, it is recommended to upgrade to the newest version of Windows.

Supported Architectures

- x86 (32-bit)
- x64 (64-bit)

Notes:

- · Support is not included for the home, small business, server core, or essentials editions of any Windows Operating Systems.
- Only the latest Service Packs are supported for each Operating System version.
- Domain Controllers are very important to all aspects of your environment; installing any software on them will take resources away from core functions (authentication, authorization, security, auditing, etc.) that can impact every user and computer in the entire domain.
- When using Dispatcher Phoenix Workflow Services on Intel's Tiger Lake processors, workflows may stop unexpectedly moments after they are started. The Windows Event log will contain a "crypto.dll" error. If you experience this issue, please refer to Intel's published fix.

Installed Dependencies

Dispatcher Phoenix installs the following dependencies:

- Microsoft Windows Imaging Component (WIC)
- Windows PowerShell 2.0
- Microsoft Visual C++ 2010 Redistributable (64-bit and 32-bit)
- Microsoft Visual C++ 2015-2019 Redistributable (64-bit and 32-bit)
- Microsoft .NET Desktop Runtime 8.0

Hardware Requirements

It is important to note that since image content varies greatly between files, performance will depend on the images being processed and the workflows concurrently running. It is suggested that you use the recommended hardware configurations below:

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Number of MFPs	1 to 10	11 to 50	51 to 100	100+
Non-OCR document processing such as annotation, document routing, renaming, etc.	RAM - 8GB Processor - Quad Core 2GHz+ Disk Space - 20GB+	RAM - 8GB Processor - Quad Core 2GHz+ Disk Space - 100GB+	RAM - 16GB Processor - Quad Core 2GHz+ Disk Space - 250GB+	RAM - 32GB+ Processor - (3x) Quad Core 2GHz+ Disk Space - 500GB+
Non-OCR document processing such as annotation, document routing, renaming, etc. with multiple active workflows.	RAM - 8GB Processor - Quad Core 2GHz+ Disk Space - 100GB+	RAM - 8GB Processor - Quad Core 2GHz+ Disk Space - 250GB+	RAM - 16GB Processor - Quad Core 2GHz+ Disk Space - 250GB+	RAM - 32GB+ Processor - (3x) Quad Core 2GHz+ Disk Space - 500GB+
OCR document processing such as Advanced OCR, Barcode, and Forms processing.	RAM - 16GB Processor - Quad Core 2GHz+ Disk Space - 100GB+	RAM - 16GB Processor - Quad Core 2GHz+ Disk Space - 100GB+	RAM - 32GB Processor - Quad Core 2GHz+ Disk Space - 250GB+	RAM - 64GB+ Processor - (4x) Quad Core 2GHz+ Disk Space - 500GB+
OCR document processing such as Advanced OCR, Barcode, and Forms processing with multiple active workflows.	RAM - 16GB Processor - Quad Core 2GHz+ Disk Space - 100GB+	RAM - 32GB Processor - Quad Core 2GHz+ Disk Space - 250GB+	RAM - 32GB Processor - (2x) Quad Core 2GHz+ Disk Space - 250GB+	RAM - 64GB+ Processor - (4x) Quad Core 2GHz+ Disk Space - 500GB+

Notes:

- Typical document specifications: 50 pages, 50% text/images, 75% black & white.
- Offload servers are recommended for any installation of 50+ MFPs.
- Performance is directly related to hardware specs.
- OCR workflows require a quad core processor.

Firewall Exceptions

When enabled, the Windows Firewall blocks all incoming network traffic to your computer except those applications and ports you allow. When installing **Dispatcher Phoenix**, please note that the following folders should be excluded from anti-virus software:

- C:\Program Files\Konica Minolta\
- C:\Program Files (x86)\Konica Minolta\
- C:\Program Data\Konica Minolta

In addition, the following **Dispatcher Phoenix** executables most often trigger an alert:

- $\bullet \quad \hbox{C:\Program Files\Konica Minolta\blox\blox-xmpp-cluster.exe}$
- $\bullet \quad \hbox{$C:\Program Files\Konica Minolta\blox\blox-xmpp-worker.exe}\\$
- C:\Program Files\Konica Minolta\conopsd\erts-5.10.4\bin\erl.exe
- C:\Program Files\Konica Minolta\conopsd\erts-5.10.4\bin\erlsrv.exe

 $\textbf{Note:} \ \ \text{The folder name for the erts-X.XX.X} \ \ \text{executables is subject to change}.$

Dispatcher Phoenix writes workflow, configuration and log files to the following locations:

- %appdata%\Konica Minolta\Dispatcher Pro Phoenix Edition
- %localappdata%\Konica Minolta\BarcodeGenerator
- %localappdata%\Konica Minolta\BubbleGrader
- %localappdata%\Konica Minolta\Dispatcher Phoenix MFP Simulator
- %localappdata%\Konica Minolta\Dispatcher Pro Phoenix Edition
- %localappdata%\Konica Minolta\Form Builder
- %commonappdata%\Konica Minolta\kmf

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- %commonappdata%\Konica Minolta\MFP Explorer
- %commonappdata%\Konica Minolta\Moxie
- %commonappdata%\Konica Minolta\Patterns
- %commonappdata%\Konica Minolta\Workflow Services Manager

Note: Dispatcher Phoenix also writes configuration data to the Windows Registry.

Depending on what optional Add-Ins are installed, you may not have all of the above folders. You can exclude only the parent folder %appdata%\Konica Minolta\ and %localappdata%\Konica Minolta\ as long as the anti-virus includes the sub-folders. Remember that these are User specific folders so each logged in User has their own copy of these folders.

Ports & Executables

- KMBS bEST Server EXE: C:\Program Files\Konica Minolta\Tuscon\Tuscon.exe Inbound Ports: 50808 (HTTP), 50809 (HTTPS)
- KMBS LPR Service EXE: C:\Program Files\Konica Minolta\blox\blox-lpd.exe Inbound Port: 515 (LPD)
- KMBS SMTP Service EXE: C:\Program Files\Konica Minolta\blox\blox-smtp.exe Inbound Port: 25 (Default, but configurable within SMTP Manager)
- SEC Workflow Worker Process EXE: C:\Program Files\Konica Minolta\conopsd\erts-7.3\bin\erl.exe Output Port: Will try to bind to any Outbound Port required by the workflow (e.g., 53, 80, 443, 25, 445, 465, 587)
- Add-In Manager EXE: C:\Program Files\Konica Minolta\AIM\2.6.0.0\AIM.exe Outbound (HTTP) Port 80, (HTTPS) Port 443

Konica Minolta MFP Prerequisites

Dispatcher Phoenix workflows run on MFPs with either Graphical and Native User interfaces. Requirements are:

- For graphical user interfaces, the i-Option (LK-101 or LK-101 v2).
 - **Notes:**
 - All Konica Minolta devices sold in the United States include LK-101.
 - Extended memory is recommended for all MFP models for which it is available as an option. Older models which are no longer covered by cer
- For native user interfaces, the i-Option and additional memory are NOT required.

Device Requirements for MFP Panel Node Workflows

- To register Dispatcher Phoenix on bEST-enabled MFPs, the device must support OpenAPI 3.5 or higher. To verify the version of OpenAPI that is supported, we recommend checking the firmware's release notes.
- To use Advanced Scan Settings (Blank Page Removal, Separate Scan, Document Sizes), the device must support OpenAPI 4.13 or higher.

For more information on device requirements, click here.

Software Maintenance

Software Maintenance (offered in 1, 3, and 5 year increments) is required for the Dispatcher Phoenix main application and all add-in modules. This maintenance covers:

- Minor and major updates
- · Maintenance releases
- · Support of new operating systems
- Critical fixes

When maintenance expires, you can continue using the application. However, to receive updates or install new packages, software maintenance must be kept active.

Notes:

- Main Application If software maintenance expires on the main application, you must buy and activate maintenance within 90 days of expiration; after this 90-day grace period, you must also purchase and activate a Maintenance Renewal Activation key that is associated with the main application.
- Add-In Modules If software maintenance expires on an add-in module (such as Advanced OCR), you can buy and activate the maintenance at any time.

All supported device models are listed on the **MFP Supported List**. If End-of-Support (EOS) for Dispatcher Phoenix on an older device model series is announced, support will no longer be guaranteed on the impacted devices after the EOS date is reached.

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Dispatcher Suite

Dispatcher Suite is an advanced platform for both print management and scan workflows, integrating **Dispatcher Phoenix** for scanning and **Dispatcher Paragon** for print management, authentication, and cost accounting. By using **Dispatcher Suite**, your workflows will be optimized for both scanning and printing efficiency. This integrated solution includes the ease of using one installer to download and install both programs, and a seamless, single sign-on experience at the MFP.

To visit the help documentation for Dispatcher Paragon, click here.

Requirements

For **Dispatcher Suite**, the recommended requirements list the resources that need to be available for **Dispatcher Phoenix** and **Dispatcher Phoenix**

Dispatcher Suite requires administrator privileges for installation. If you do not have administrator rights to the computer where you would like to install Dispatcher Suite, contact your network administrator.

For all platforms, we recommend that you upgrade to the latest Windows Service Pack and critical updates available from the Windows Update website to ensure the best compatibility and security. Installation of the latest Windows Service Pack may be required on some operating systems.

Note: Dispatcher Suite must be installed on a machine that is part of the Active Directory domain.

Hardware Requirements

Category	Small-Medium Deployment Recommendation (ex. up to 100 Users, 40 devices, 10-15 workflows, etc.)	Large Deployment Recommendation (ex. 200+ Users, 200+ devices, 20+ Workflows, etc. per server)
Processor	8 core CPU, 2.5 Ghz+ with 512MB VRAM for Higher	8 core CPU, 2.5 Ghz+ with 512MB VRAM for Higher
Memory	16 GB RAM	32 GB RAM
Hard Disk Speed	150 MB/s or 100 IOPS or SSD	150 MB/s or 100 IOPS or SSD and a connection to storage with a throughput of at least 150 MB/s and 300 IOPS
Free Space Required	256 GB Free Space	1 TB Free Space
Dual Server Setup		Recommended

Note: To improve performance, you should install Dispatcher Suite on a solid state drive (SSD).

Operating System Requirements

Dispatcher Suite is a next-generation workflow automation and print management software.

Operating System	Service Pack	Dispatcher Paragon	Dispatcher Phoenix
Windows Server 2016	N/A	/	/
Windows Server 2019	N/A	/	✓
Windows Server 2022	N/A	✓	/

Note: While Dispatcher Suite supports Windows Server 2012 and Windows Server 2012 R2, Dispatcher Phoenix and Dispatcher Paragon+ only support Windows Server 2016 and newer.

Dependencies

The following dependencies are required for **Dispatcher Suite**. Typically, the Dispatcher Suite installer will detect and auto install all the required dependencies if they are missing on the system.

- Microsoft Windows Imaging Component (WIC)
- Windows PowerShell 2.0
- Microsoft Visual C++ 2010 Redistributable (32-bit)

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- Microsoft Visual C++ 2010 Redistributable (32-bit)
- Microsoft Visual C++ 2015-2019 Redistributable (32-bit)
- Microsoft Visual C++ 2015-2019 Redistributable (32-bit)
- Microsoft .NET Desktop Runtime 8.0

Firewall Exceptions

Dispatcher Phoenix

Click here for more information on how to configure your firewall exceptions for Dispatcher Phoenix.

Dispatcher Paragon

If antivirus protection is installed on the **Dispatcher Paragon** server, the entire Dispatcher Paragon directory and Dispatcher Paragon system services must be removed from the real-time anti-virus tests. For more information on the required antivirus settings for **Dispatcher Paragon**, **click**

Configuring Dispatcher Suite

Caution! Dispatcher Phoenix's LPR Service will be incompatible with the Dispatcher Paragon FlexiSpooler since both services use the same Port. In this case, to use the Dispatcher Paragon FlexiSpooler for print roaming, do the following:

- 1. Using the Windows Services application, stop the KMBS SEC LPR Service.
- 2. Right-click and select **Properties** from the menu that appears.
- 3. On the KMBS SEC LPR Service Properties window, select **Manual** from the Startup type drop-down list; then select the **OK** button when you are
- 4. Once the Dispatcher Phoenix LPR Service has been disabled, restart the Dispatcher Paragon FlexiSpooler.

To configure Dispatcher Suite, you must do the following:

- Enable Workflow Services Manager for LDAP
- · Configure Dispatcher Phoenix System Settings
- Configure Dispatcher Paragon System Settings
- Synchronize LDAP Users
- Set Up Access Rights
- Set Up Device Synchronization

Enable Workflow Services Manager for LDAP

Windows Authentication for LDAP Lookup must be enabled in **Dispatcher Phoenix's Workflow Services Manager**. By enabling LDAP Lookup, Active Directory users automatically gain access to their **Dispatcher Phoenix** workflows when they authenticate at an MFP. **Click here** for information on setting this up.

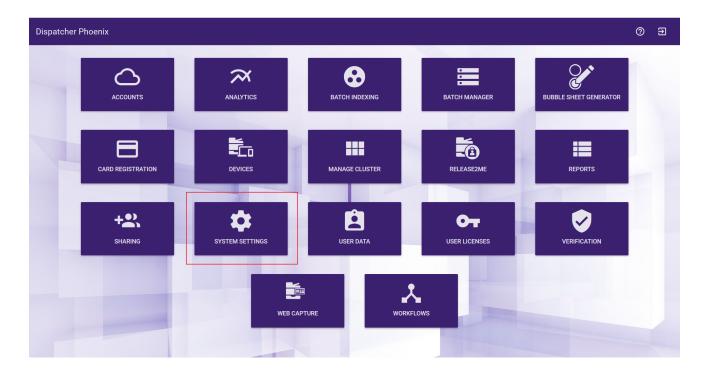
Configure Dispatcher Phoenix System Settings

The following properties must be configured in order for **Dispatcher Phoenix** to successfully send and receive MFP and user information from **Dispatcher Paragon**.

1. Launch Dispatcher Phoenix Web, and click the System Settings card on the Home page as shown in the following illustration:

Note: You will need to login to DP Web as an administrator to see the System Settings.

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2. The System Settings tile includes two tabs, one for Dispatcher Paragon and the other for Network & Security. The Dispatcher Paragon tab includes two sections, one for Dispatcher Paragon Integration and one for Dispatcher Phoenix. The Dispatcher Paragon system settings appear under the Enable Dispatcher Paragon Integration checkbox.

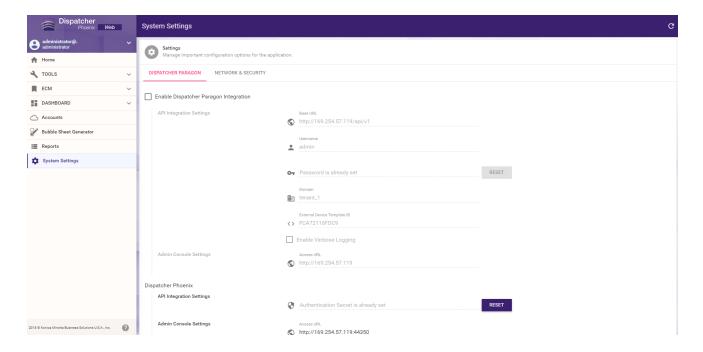
The **Dispatcher Paragon** system settings contain the following fields:

- Check the Enable Dispatcher Paragon Integration box.
- Base URL This is the API URL for Dispatcher Paragon. This value should match the IP address of the computer or server that both Paragon and Dispatcher Phoenix are installed on.
 - If Dispatcher Phoenix and Dispatcher Paragon MU 73+ are installed on the same server, you must change the Base URL from "http" to "https". For previous versions of Dispatcher Paragon, you can leave the default value as is.
 - If Dispatcher Phoenix and Dispatcher Paragon are installed separately (each one on a different server), then update the IP address of the URL to match the IP address of the server where Dispatcher Paragon is installed.
 - If the Dispatcher Paragon server is listening to HTTP requests on a port other than default (80), make sure to add the correct port value to the Base URL.
- Username & Password Change this to the username and password associated with the designated service account in Dispatcher Paragon as described in the Setup Access Rights help section.
- The Domain defaults to tenant_1, because Paragon only supports a single tenant. This field should not be changed.
- External Device Template ID This value is automatically assigned and should not be changed. The value is used when creating a device template in Paragon and should be written down or saved in a secure location.
- Enable Verbose Logging This tool increases the data provided in logs, which can be useful when troubleshooting. Leave this option unchecked unless otherwise necessary.
- Access URL This is the Web URL for Dispatcher Paragon.
 - If Dispatcher Phoenix and Dispatcher Paragon are installed on the same server, then you can leave the default value as is.
 - If Dispatcher Phoenix and Dispatcher Paragon are installed separately (each one on a different server), then update the IP address of the URL to match the IP address of the server where Dispatcher Paragon is installed.

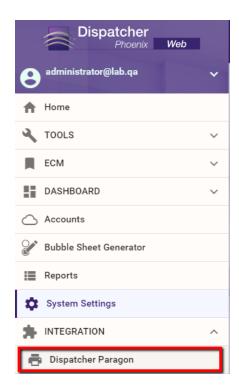
The ${\bf Dispatcher\ Phoenix}$ system settings contain the following fields:

- **Authentication Secret** This is an automatically assigned value that will be used when **configuring Paragon**. Do not modify this field. This value must be the same in Dispatcher Phoenix and Dispatcher Paragon and should be written down or saved in a secure location.
- Access URL This is the IP address of Dispatcher Phoenix Web and does not need to be changed.

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- 3. Click **Save** in the lower right corner of the Systems Settings page.
- 4. The Network & Security tab allows you to configure proxy and certificate settings. For more information, click here.
- 5. A **Dispatcher Paragon** button will then be added to the home screen. Additionally, an **INTEGRATION** section will be added to the side menu automatically with a **Dispatcher Paragon** link underneath as shown in the following illustration. This link will direct you to the **Dispatcher Paragon Management Interface**.



After completing the configuration steps, users will be able to navigate to both the **Dispatcher Phoenix** and **Dispatcher Paragon** web interfaces from the **Dispatcher Phoenix** client application using the following instructions:

1. Open **Dispatcher Phoenix**. Then, navigate to the **Tools** dropdown in the upper right-hand corner.

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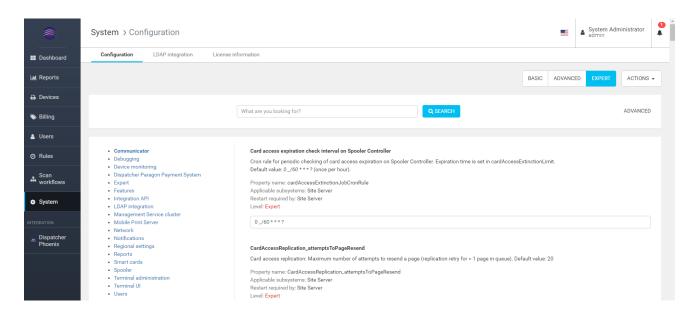


2. Navigate to Dispatcher Phoenix Web or the Dispatcher Paragon Management Interface.

Configure Dispatcher Paragon Settings

As the next step in a successful install of **Dispatcher Suite**, you will need to configure **Dispatcher Paragon** properly in order for the application to send and receive MFP and user information from **Dispatcher Phoenix**. To do this, follow the steps below:

1. Once your license has been activated, log back into **Dispatcher Paragon**. On your **Dashboard**, in the left-hand menu, navigate to the **System** button at the bottom. This should navigate you to the **Configuration** section as shown in the following illustration:

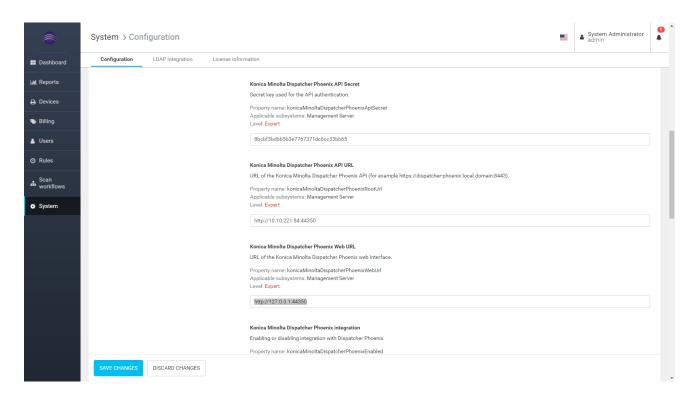


- 2. Select the **Expert** button in the top far right of the screen, and then click the **Integration API** subgroup in the left-hand column. Configure the following properties:
 - Konica Minolta Dispatcher Phoenix API Secret Enter the Dispatcher Phoenix JSON Web Token (JWT) Key. This can be retrieved
 by launching Dispatcher Phoenix Web and copying the Authentication Secret from System Settings into this field. For more

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information, please see the Configuring Dispatcher Phoenix Web Interface help section described above.

- Konica Minolta Dispatcher Phoenix API URL Enter the Access URL of the Dispatcher Phoenix API. This value should not change
 unless Dispatcher Phoenix has been installed on a different device than Dispatcher Paragon. In that case, the Dispatcher Phoenix IP
 address should be entered.
- Konica Minolta Dispatcher Phoenix Web URL Enter the Access URL of the Dispatcher Phoenix Web. This value should not change
 unless Dispatcher Phoenix has been installed on a different device than Dispatcher Paragon. In that case, the Dispatcher Phoenix IP
 address should be entered.
- Konica Minolta Dispatcher Phoenix Integration Set to Enable.
- List of the IP addresses that are allowed to communicate with terminal services Enter the IP Address for the installation.



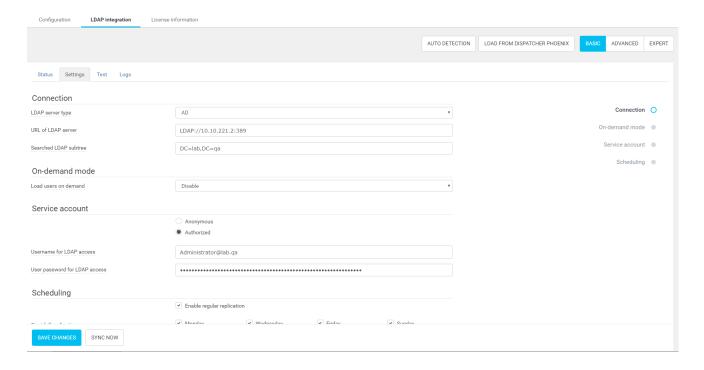
3. Select the **Save Changes** button when you are done.

Synchronize LDAP Users

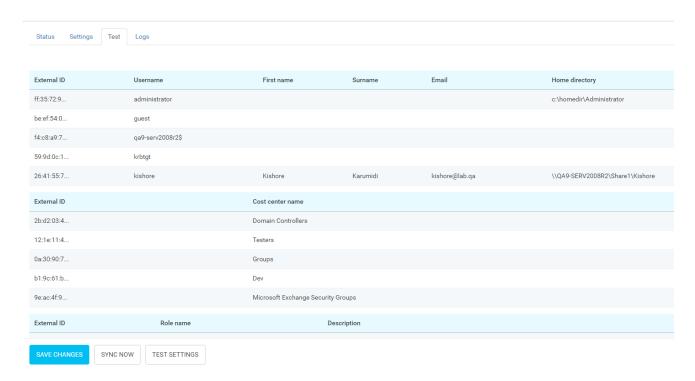
Synchronizing these users with **LDAP** allows them to be shared between **Dispatcher Paragon** and **Dispatcher Phoenix** and enables single sign on at the MFP. To do this, follow the steps below:

- 1. Launch the **Dispatcher Paragon Management Interface**. Then, navigate to **System** in the left-hand menu.
- 2. Select LDAP Integration from the navigation at the top of the page. Then, navigate to the Settings tab.

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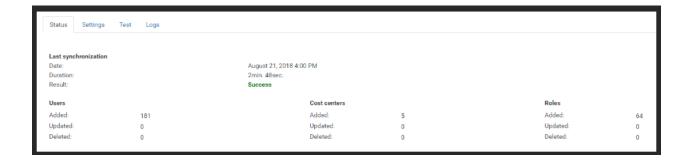


- 3. Select **Load From Dispatcher Phoenix** from the top right-hand navigation bar. This step will only work if **LDAP lookup** has already been configured in **Workflow Services Manager**. For more information, please see the **Configuring for LDAP Lookup** help page.
- 4. Select the Save Changes button.
- 5. Go to the **Test** page under **LDAP Integration**, and select the **TEST SETTINGS** button at the bottom as shown in the following illustration:



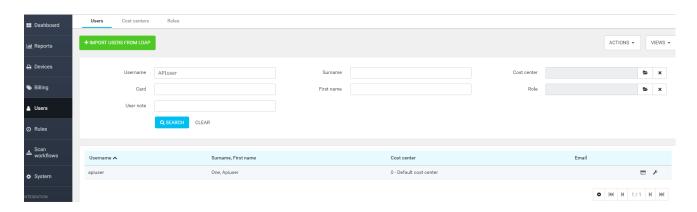
6. After the settings are tested and return successful results, click the **SYNC NOW** button to populate the users. To check the progress of the synchronization, click **Status** tab, and you will be able to see how many users have been added. It will say **Success** next to **Result** once the sync is complete as shown in the following illustration:

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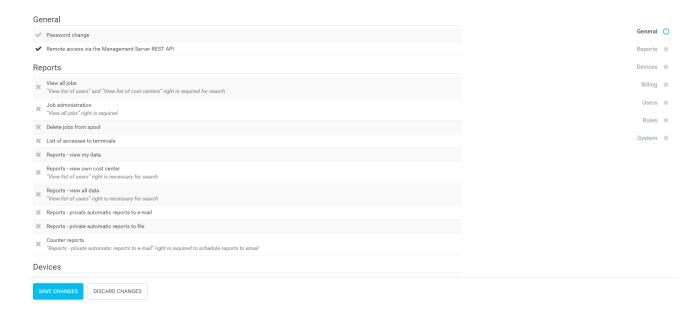
Setup Access Rights

1. Log in to **Dispatcher Paragon Management Interface** as an administrator, and navigate to **Users** in the main menu. From your user database, select a user, other than *admin*, to be the designated service account that will facilitate communication between Dispatcher Phoenix and Dispatcher Paragon. click here for more information on configuring a service account.



- 2. Click the Set Up Access Rights icon, 🚍 , that appears to the far right of the user and check that the rights listed below are enabled for this account.
 - General
 - Remote access via the Management Server REST API
 - Devices
 - List of printers and queues
 - Printers and queues administration
 - System
 - System settings basic options
 - System settings advanced options
 - System settings expert options

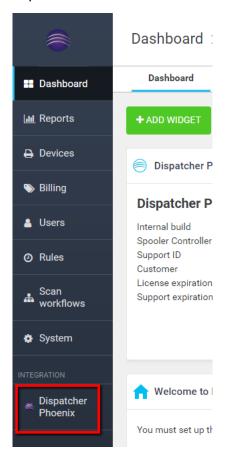
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3. Select the Save Changes button.

Note: The service account you choose is set up is used to ensure that Paragon and Phoenix can communicate successfully.

Once you have completed these steps and the **Dispatcher Paragon Management Interface** is correctly configured, the side menu will automatically add an **Integration** section with a **Dispatcher Phoenix** link underneath, as shown in the following illustration. The link will go to **Dispatcher Phoenix Web**:

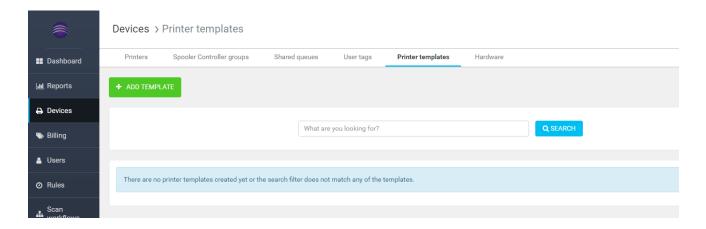


Setup Device Synchronization

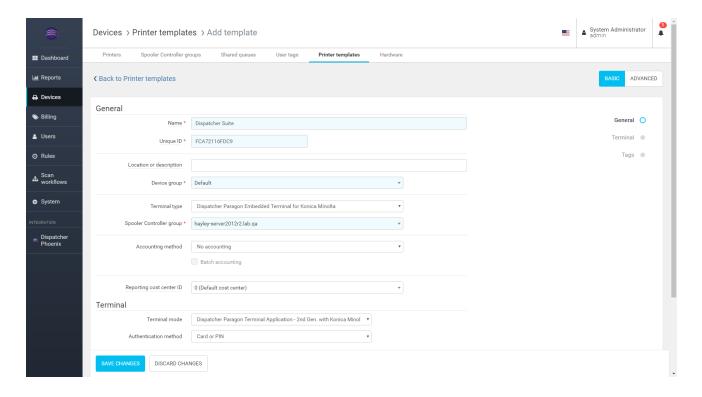
You must also set up a device template that can be used any time an MFP is added from **Dispatcher Paragon**. To do this, follow these steps below:

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1. Launch **Dispatcher Paragon Management Interface**. Navigate to **Devices** in the left-hand menu, and then select **Printer templates** as shown in the following illustration:



- 2. Select ADD TEMPLATE button and fill out the form shown below with the following information:
 - **Unique ID** This value can be retrieved by launching **DP Web** and copying the **External Device Template ID** from **System Settings** into this field. For more information, please see the **Configuring Dispatcher Phoenix Web Interface** help section.
 - Select Terminal type Dispatcher Paragon Embedded Terminal for Konica Minolta.
 - Select Terminal mode Dispatcher Paragon Terminal Application 2nd Gen. with Konica Minolta theme. This option supports
 Konica Minolta's updated graphical MFP Interface. To use Konica Minolta's Native MFP UI, select the Native option.



3. Select Save Changes.

Device Synchronization

To provide more fine-grain control of devices and to enhance the user experience, **Dispatcher Suite** offers additional functionality within the **Devices** tool in **Dispatcher Phoenix Web**.

When adding an MFP in **Dispatcher Phoenix** or **Dispatcher Paragon**, the new device will automatically sync to the other platform. Additionally, changing data on either device list will populate to both device lists. If a device is added in Dispatcher Phoenix without a value in the optional Name field, Dispatcher Paragon will add the device to its device list with the Model as its name. If a value is later added to the optional Name field in Dispatcher Phoenix, that will override the Name in Dispatcher Paragon. If a device is added in Dispatcher Paragon and the Name added is the same as

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the known-to-Dispatcher Phoenix Model, then only one name will display from the Dispatcher Phoenix registration tool. However, if the Name entered in Dispatcher Paragon is a different value, then the most recently updated name will be displayed.

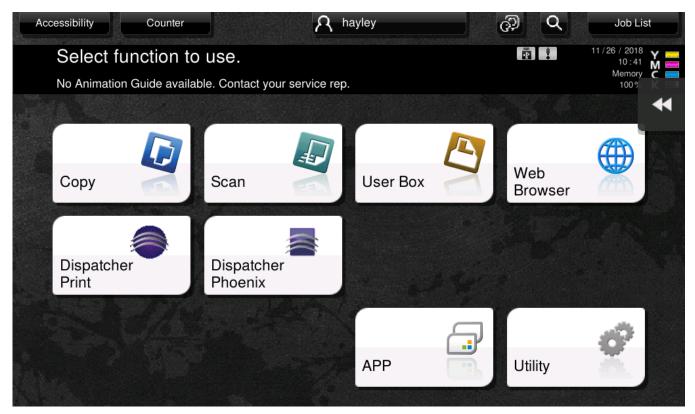
Note: In certain fields, any information entered or edited into Dispatcher Phoenix will be shared to Dispatcher Paragon, and vice versa, as shown in the following table:

Dispatcher Phoenix	Dispatcher Paragon
Host Name/IP Address	Network Address
Name (optional) or Model	Name
Admin Password	Admin Password
Description	Location or description
Equipment ID (located in Additional Info tab)	Equipment ID (located in Meta subsection)
Service Agreement ID (located in Additional Info tab)	Service Agreement ID (located in Meta subsection)
Contact Person (located in Additional Info tab)	Contact person (located in Meta subsection)
ZIP Code (located in Additional Info tab)	ZIP code (located in Meta subsection)

Important! If the MAC address of your device changes, it is strongly recommended that you remove the existing device from Dispatcher Phoenix and Dispatcher Paragon. Then, you can re-add the device using Dispatcher Phoenix's Devices Tool. Deleting an MFP from Dispatcher Phoenix will remove it from Dispatcher Paragon. Deleting an MFP from Dispatcher Phoenix.

MFP Integration

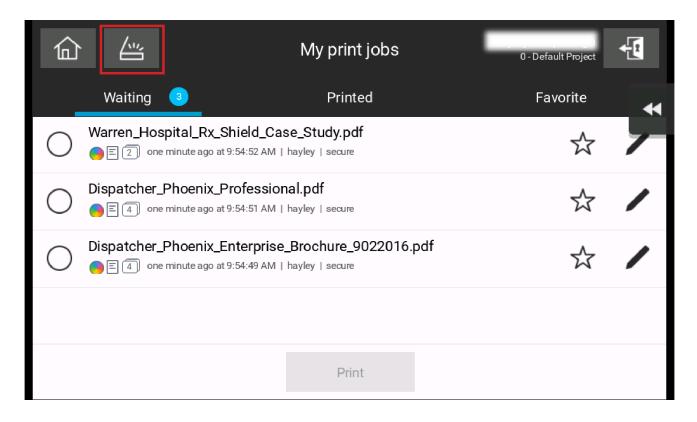
Once you have configured both **Dispatcher Phoenix** and **Dispatcher Paragon**, users can begin using both platforms at the MFP. The **Dispatcher Suite** solution allows for the single sign-on integration of both print management and scanning capabilities to create a seamless user experience with the same look and feel at the MFP.



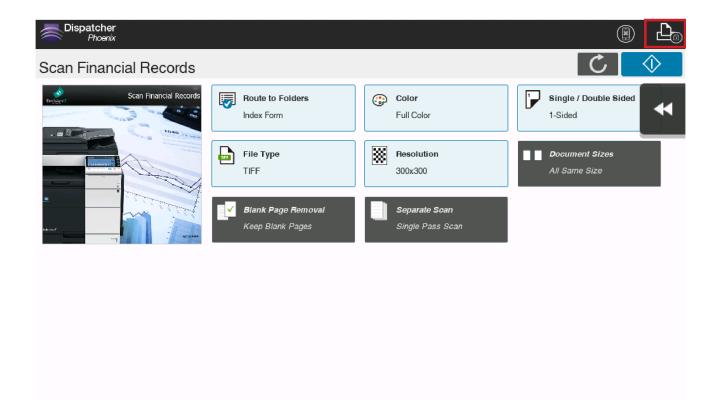
From the MFP panel, you can switch between Dispatcher Phoenix and Dispatcher Paragon.

1. To access **Dispatcher Phoenix** from **Dispatcher Paragon** at the MFP, tap the **Scan** button in the upper, left corner as shown in the following illustration:

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2. To access **Dispatcher Paragon** from **Dispatcher Phoenix** at the MFP, tap the **Print** button in the upper, right corner as shown in the following illustration:



Dispatcher Phoenix Installation

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This page contains instructions on how to install and register the standard application, add-in nodes, and maintenance.

Dispatcher Phoenix has a **per machine** license, meaning the application is licensed and registered to be **used on a specific PC only**. For instructions on how to transfer a license to a new computer visit **License Transfer**.

Before you begin installing the application, please make sure that you have administrative privileges on the PC.

To install Dispatcher Phoenix from a CD/DVD or executable file, do the following:

- 1. Insert the CD/DVD into the appropriate drive or double-click on **Dispatcher Phoenix** icon to start the installation process.
- 2. If installing from a CD/DVD, the AutoPlay window will appear. Click on the **Run autorun.exe** option.

The Dispatcher Phoenix Installer will appear. The following illustration is an example of the Dispatcher Phoenix Installer:



- 3. Select the item that you want to install from the drop-down list (Dispatcher Phoenix, Offload license, or Workstation).
- 4. Select the version (64-bit or 32-bit) of the application using the radio buttons provided.
- 5. Select the ${\bf Install\ Application}$ button.
- 6. If the User Account Control window appears, asking for confirmation to have Dispatcher Phoenix make changes to your system, select Yes.
- 7. On the Welcome window, select the **Next** button as shown below:

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The User License Agreement window will now appear.

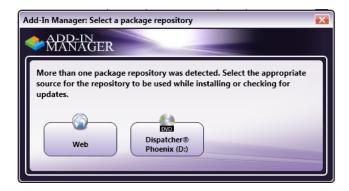
- 8. On the User License Agreement window, read the license agreement; then click on the I accept the agreement radio button to continue with the installation process. Select the **Next** button when you are done. The Information window will now appear.
- 9. On the Information window, you can view release information about the application. Select the **Next** button to continue. The Select Additional Tasks window will now appear.
- 10. On the Select Additional Tasks window, you can specify what kinds of icons you want to add to your desktop or toolbar. Select the **Next** button when you are done.



Note: The Show Quick Launch option must be enabled in order for a Quick Launch icon to be created. For many operating systems, the Show Quick Launch option can be found on the Taskbar and Start Menu Properties window (accessed by right-clicking on the Start menu and then choosing Properties).

- 11. A Ready to Install window will now appear with a summary of what you have chosen. Once you select the **Install** button, the Set Up window will begin setting up your system for Dispatcher Phoenix.
- 12. If multiple source locations are detected (e.g., CD/DVD, USB drive, Internet, etc.), the **Select a package repository** window will appear, listing all available source locations for package repositories for you to choose from. See the following illustration for an example of the Select a Package Repository window:

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For more information on registering Dispatcher Phoenix, please see the Registration page.

Installing Dispatcher Phoenix Without Internet Access

If you need to install Dispatcher Phoenix at a site that has either no or limited Internet connection, do the following:

- 1. Copy the Web repository.
- 2. Install updates from that downloaded repository.

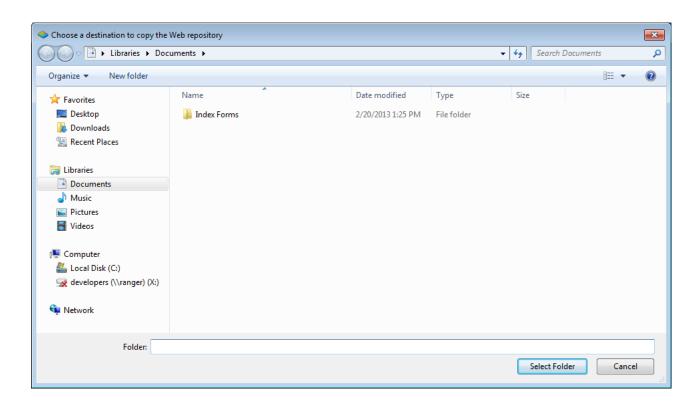
Note: For fresh installs of Dispatcher Phoenix, this process will only work if all of the Dispatcher Phoenix prerequisites (Microsoft .Net Framework 4.8, etc.) are installed.

Copy Web Repository

- 1. Open the Add-In Manager.
- 2. Select the **Options** button.
- 3. On the Options window, click on the Copy Web Repository button.
- 4. The **Choose a destination to copy the Web repository** window will open. Select some external media (e.g., USB drive) to save the repository in; then click on the **Select Folder** button.

Note: Make sure you copy the web repository to the media's root directory or any first-level directory; otherwise, Add-In Manager will not be able to auto-detect the local repository.

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5. The powershell.exe window appears and begins downloading the web repository to the specified location. See the following illustration for an example:



Install Updates From Downloaded Repository

To install updates using the repository that you just downloaded to some external media, do the following:

- 1. Make sure that the media on which you downloaded the web repository is connected to the system that you are trying to update.
- 2. Do one of the following:
 - From **Dispatcher Phoenix**, do the following:
 - 1. Choose the **Check for Updates** option from the **Help** pull-down menu.
 - 2. The **Select a package repository** window will appear.
 - 3. Select the source location that contains your downloaded repository.
 - 4. Add-In Manager will launch and begin downloading/installing files from that location.
 - From Add-In Manager, do the following:

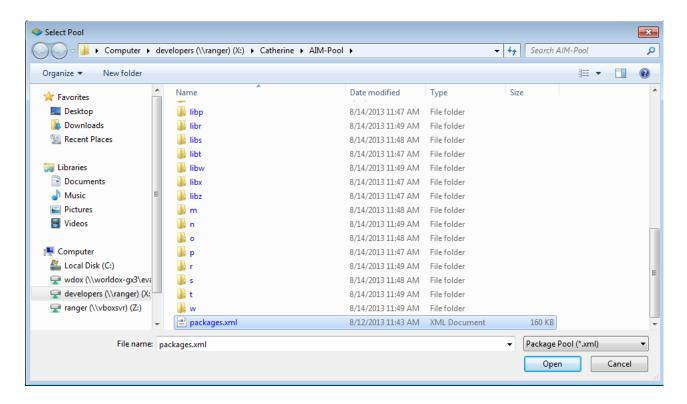
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- 5. Click on the Select Updates From: link on the left-hand side of the window.
- 6. Select the source location that contains your downloaded repository.
- 7. Select the Install Updates button.

Updating Dispatcher Phoenix from a Network Share

Downloading updates for each license may be time-consuming if a business has multiple licenses of Dispatcher Phoenix. As a solution, Add-In Manager can be configured to install all updates from a network share. To set this up, do the following:

- 1. Copy the Web repository.
- 2. Copy the downloaded repository to a network share.
- 3. Open Add-In Manager.
- 4. Select the **Options** button.
- 5. Select the **Specify optional local repository Browse** button to find and select the **packages.xml** on the network share that contains the downloaded repository. See the following illustration:



6. Select the **Save** button to save your changes and close the Add-In Manager.

Using the Add-In Manager

Dispatcher Phoenix offers an Add-In Manager tool that allows for easy installation of additional optional nodes and updates to existing nodes, as well as un-installation of nodes and packages.

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For more information about the Add-In Manager, visit the Add-In Manager page.

Registering Add-In Modules

Dispatcher Phoenix is installed with several powerful features. With Add-In modules, you can expand and enhance the features of the application to fit your unique needs.

You can also purchase additional Dispatcher Phoenix base licenses to increase the number of capture sources for your Dispatcher Phoenix workflows. Once you have purchased an additional Dispatcher Phoenix license, follow the instructions below to register the license and increase your number of available inputs.

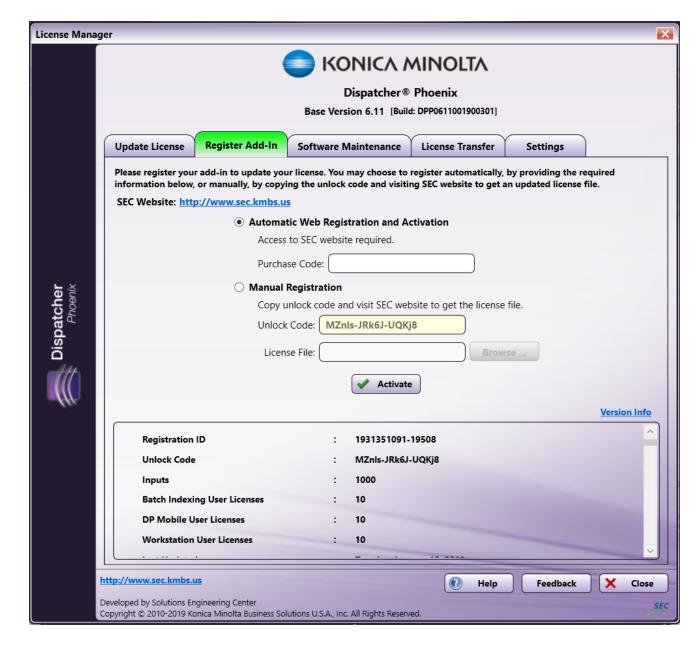
Due to the fact that you are adding on to an existing installation of **Dispatcher Phoenix**, the registration process differs slightly from the processes described above for the main application.

Caution! License files are specific to the corresponding installation, so trying to use a license file from a different machine will not work.

To register an add-in, do the following:

Choose Register Add-In... from the Help menu in Dispatcher Phoenix, or the Tools pull-down in the Add-In Manager. (The Register Add-In...
option changes to Register Product... if you are running a Demo version of Dispatcher Phoenix). The License Manager will open with the
Register Add-In tab already opened, as in the following illustration:

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- 2. You can do the following:
 - Register automatically
 - Register manually
- 3. Activate the Purchase Code or License File.

The Congratulations window will appear, listing the add-in module(s) that you have just registered.

- 4. Select the **OK** button to close the message; then select the **Close** button on the License Manager. A message will appear, alerting you to the fact that an updated license has been detected and that Add-In Manager will be used to install the new package(s) available for your license.
- 5. If the User Account Control window appears, asking for confirmation to have Dispatcher Phoenix make changes to your system, select Yes.
- 6. If multiple source locations are detected (e.g., CD/DVD, USB drive, Internet, etc.), the **Select a package repository** window will appear, listing all available source locations for package repositories for you to choose from. If this window appears, you should select the appropriate source.
- 7. Add-In Manager will launch and the appropriate package(s) will be downloaded and installed.

Add Ins - Automatic Web Registration

To register automatically, do the following:

1. Select the Automatic Web Registration and Activation radio button.

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- 2. In the **Purchase Code** field, enter the purchase code for the add-in module.
- 3. Select the Activate button.

Add Ins - Manual Registration

For manual registration, select the **Manual Registration** radio button and copy the Unlock Code. Go to the Konica Minolta Solutions Engineering Center (SEC) website at **SEC website** and register the application. To do this, follow these steps:

- 1. Copy the unlock code to the clipboard.
- 2. Click on the link on the registration page, which will open your browser and bring you to the (SEC website).
- 3. Select the Register button.
- 4. Select the Click here to register your add-in or software maintenance radio button.
- 5. Enter the valid purchase code you received at the time of your Add-In purchase.
- 6. Enter (or paste) the unlock code from your installation of **Dispatcher Phoenix**.

Important! Add-Ins require entry of the UNLOCK CODE for verification. This is a departure from the main application registration process.

- 7. Select the **Submit** button to generate the license file which corresponds to your application. A link to this file will be displayed. Click the link to download your license file.
- 8. Return to the **Dispatcher Phoenix** application, browse to and select the appropriate license file, and click **Activate**. **Do NOT unzip the license file prior to activation**.

Note: For additional instructions on how to purchase, download, install and license Konica Minolta SEC Applications, please refer to the "Assistance" section of the **SEC website**.

Licensing

Dispatcher Phoenix licensing governs what features and abilities the application has from "out of the box" through whichever add-ins you decide to purchase and register to enhance the product. For more information about Dispatcher Phoenix Licensing, visit the **License Manager** page.

Login Credentials Required

After registration and licensing and during installation, a Windows Service Account Creation window will appear, requesting a password to be entered (or created) and verified, as in the following illustration:



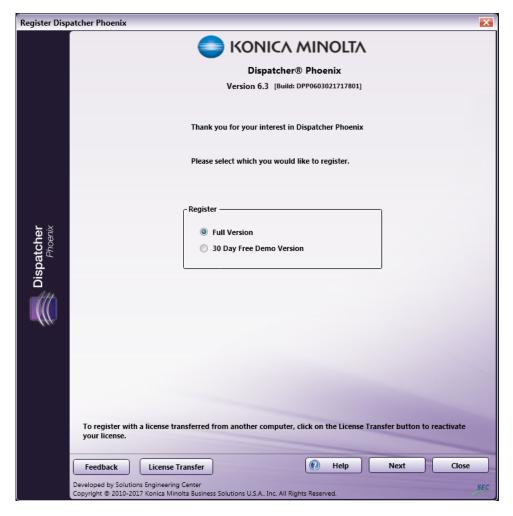
Uninstalling the Application

To uninstall the Dispatcher Phoenix application, use the **Uninstall a program** option from the Windows Control Panel. When you choose to uninstall the application, a confirmation message appears.

Registration

When registering Dispatcher Phoenix, you can register the application as either a **Full Version** or a **Demo Version**. The Demo Version allows you to try out all of the Dispatcher Phoenix features and functions for thirty days and includes three licensed Active Inputs. See the following illustration:

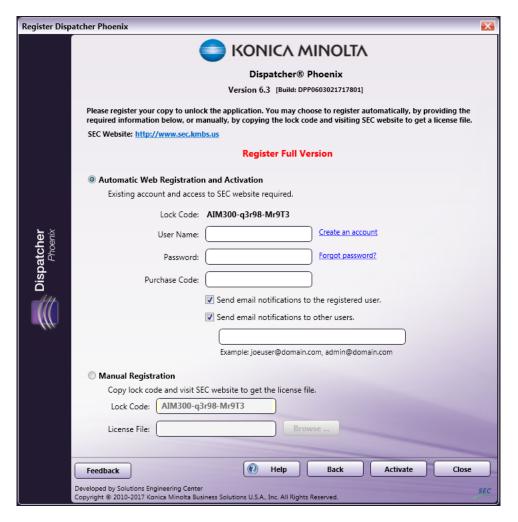
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To register a full version of the product, do the following:

1. Select the Full Version radio button; select the next button. If you select **Full Version**, the next screen requires you to activate the program. This screen contains the lock code exclusive to the installation. Each lock code is unique, because it is generated based on the specific machine hardware where it is installed. Registration can be automatic or manual. See the following illustration:

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- Automatic Web Registration and Activation If you have an existing account on the SEC website, select Automatic Web Registration and Activation and do the following:
 - 1. Enter your User Name, Password, and Purchase Code for the Dispatcher Phoenix application.
 - 2. Check or uncheck the checkboxes to specify whether to send email notifications, including software maintenance renewals, to the registered user and/or other users. If you check the box for **Send email notifications to other users**, a blank field appears and you can enter multiple email addresses separated by a space, comma, or semicolon.
 - 3. Select the **Activate** button and the appropriate license file will be automatically downloaded and installed, thus activating your copy of Dispatcher Phoenix. There are links to create an account and reset your password. There is also a link to the **SEC website**.

Note: License files are specific to the corresponding lock code, so trying to use a license file from a different machine will not work.

- Manual Registration For manual registration, select the Manual Registration radio button and do the following:
 - 1. Copy the Lock Code to the clipboard.
 - 2. Click on the link on the registration page, which will open your browser and bring you to the SEC website.
 - 3. If you do not have a login profile, you will need to create one for free.
 - 4. Click on the **Register** link at the top of the page to go to the application registration screen.
 - 5. Select the radio button next to Click here to register your application section of the page.
 - Click here to register your application:
 Enter your Purchase Code (sent via e-mail or printed on CD, unless this is a free or demo product).
 Enter your Lock Code or Registration ID (presented the first time you <u>run</u> your new software).
 Click the Submit button.

6. In the fields below, enter a valid purchase code.

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Note: If you have the Dispatcher Phoenix CD, a purchase code and the number of licenses purchased will be indicated. If you do not have the CD, you can go to the Products section of the SEC website to purchase the application.

- 7. Enter (or paste) the lock code from your installation of Dispatcher Phoenix.
- 8. Select the Dispatcher Phoenix application from the drop-down list.
- 9. Select the **Submit** button to generate the license file that corresponds to your application. A link to this file will be displayed. Click the link to download your license file.

Thank You Thank you for registering Dispatcher Phoenix. A new license file is available for your product and should be imported. This can be done by downloading and importing it manually or by clicking the Update button on your applications Registration screen. Download License A link to this file has also been e-mailed to xxx@xxx.com Click here to return to the Product Catalog, or Click here to return to the Home Page. Thank You

10. Return to the Dispatcher Phoenix application, browse and select the appropriate license file in the **License File** field; then select the **Activate** button. Do not unzip the license file prior to activation. The license file only needs to be loaded once. Future updates to the software application will recognize all valid installations.

To register a demo version of the product, do the following:

Select the Demo Version radio button; select the next button. If you select 30 Day Free Demo Version, you will be required to activate the
program. You should follow the same steps as those for registering the Full Version of the application; the only exception is when registering
automatically, you do not need to specify a Purchase Code.

Once the application is successfully registered, the Add-In Manager begins downloading and installing packages.

Note: If the installer requires a mid-way restart when you are running from a location that requires entering credentials before accessing, the installer will not automatically continue after restart. To continue, you must run the install again.

License Manager

The license manager provides you with the ability to update your license, register an add-in module, view maintenance, transfer a license, and specify users to send email notifications to.

Licensing

Dispatcher Phoenix licensing governs what features and abilities the application has from "out of the box" through whichever add-ins you decide to purchase and register to enhance the product.

To view what capabilities are licensed for your specific installation of **Dispatcher Phoenix**, select **License Manager** from the **Help** menu. Base nodes and Add-In nodes will be organized separately. In addition, a status of "Installed" or "Not Installed" will be listed next to each node. If a node is installed but the application needs to be restarted in order for the node to be functional, a status of Installed (Application requires restart) will be listed next to it.

Licensing - Counting Active Inputs

Dispatcher Phoenix is licensed by **Active Input**. An input is any entry point into a workflow (e.g., Input Folder, MFP User Box, MFP Panel, LPR In, SMTP In, Workstation, Email In, Dropbox In, etc.) and is considered *active* when the workflow is running or is scheduled to run. This means that activating a scheduled workflow will use a license. Any Active Inputs that are duplicated or disabled do not increase the Active Input count.

Note: The Workstation collection node and the Dispatcher Phoenix Mobile collection node do NOT consume an Active Input when used in running workflows. However, user licenses need to be purchased in order to use these features.

Active inputs are counted across multiple workflows by the following:

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Input Node	Folder Path	Host Name	IP Address	Print Queue	URL	Channel
Dropbox In	1	-	-	-	-	-
Email In	-	1	1	-	-	-
FTP In	1	1	1	-	-	-
HTTP In	-	-	-	-	1	-
Input Folder	1	-	-	-	-	-
JDF Converter	✓	-	-	-	-	-
LPR In	-	-	-	1	-	-
Microsoft Teams In	-	-	-	-	-	/
MFP Panel	-	1	1	-	-	-
MFP User Box	-	1	1	-	-	-
SMTP In	-	1	1	-	-	-
Web Capture	-	1	✓	-	-	-

This means that one device used in multiple workflows is only counted ONCE. Similarly, one device used in multiple Input nodes, such as MFP Panel, MFP User Box, and SMTP In, is only counted ONCE. If multiple Input Folders in multiple workflows are collecting from the same directory, they are only counted ONCE.

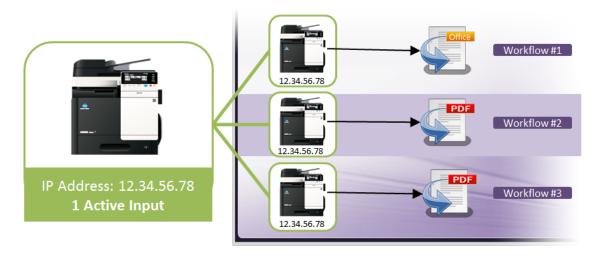
For more complex workflows, you can increase the number of inputs by purchasing additional Dispatcher Phoenix licenses. Additional licenses increase the number of available inputs by one per license.

Notes:

- The Dispatcher Phoenix Mobile and Workstation collection nodes are not counted as Active Inputs.
- The Microsoft Teams In node defines an active input as a unique combination of account, Team, and Channel. If two workflows use the same account/team/channel combination, it will count as one active input. Different combinations (e.g., the same account and team but a different channel) would be considered separate active inputs.
- The Demo Version comes with three (3) available active inputs. However, this version cannot license any additional inputs beyond these initial three.

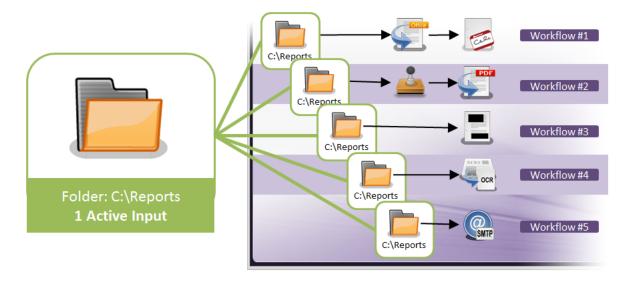
In all of the following examples, ONE active input is counted:

THREE workflows are running on the same device (Total Active Input Count = 1):

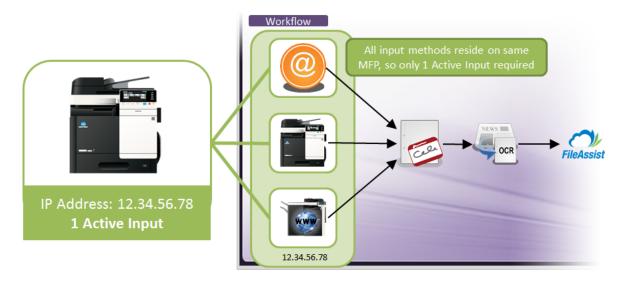


FIVE workflows are collecting from the same Input Path (Total Active Input Count = 1):

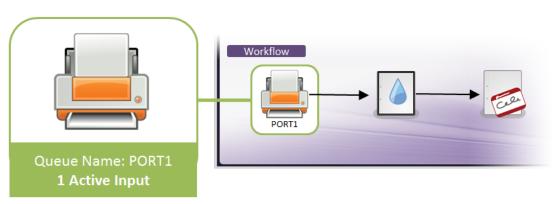
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ONE workflow with THREE different types of Input nodes all using the same device (Total Active Input Count = 1):



ONE workflow using 1 LPR In input node (Total Active Input Count = 1):



Active Input Restrictions

- MFP Panel One MFP Panel node per workflow
- SMTP In One SMTP In node per workflow. Only one SMTP In workflow can run at a time.

• LPR In - No restrictions

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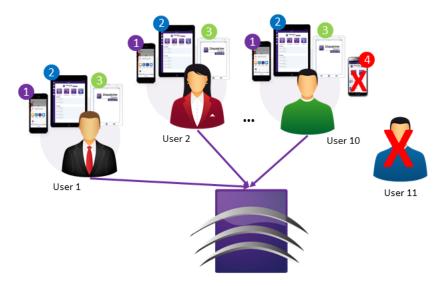
DP Mobile Licensing

Although every Dispatcher Phoenix package includes a DP Mobile Input node, the appropriate licenses for DP Mobile users must be purchased before DP Mobile is available for use.

Dispatcher Phoenix Mobile is licensed by:

- Users You can purchase license packs for 10, 25, 50, 100, 250, 500, and 1000 users.
- Devices Each individual user can use up to 3 devices to connect to the Dispatcher Phoenix server.

For example, a DP Mobile 10 User License pack would allow 10 users to use DP Mobile on 3 devices each. See the following illustration for an example:



You can view your DP Mobile licensing information using the Options window accessible through the Tools menu in the main application screen.

Re-Activating a License

In the rare case that a license file changes, whether through a system error or tampering, the original license file may be reapplied in order to restore the application to working condition. When the license file cannot be read or has been tampered with, you will need to fill out the following section of the License Manager:



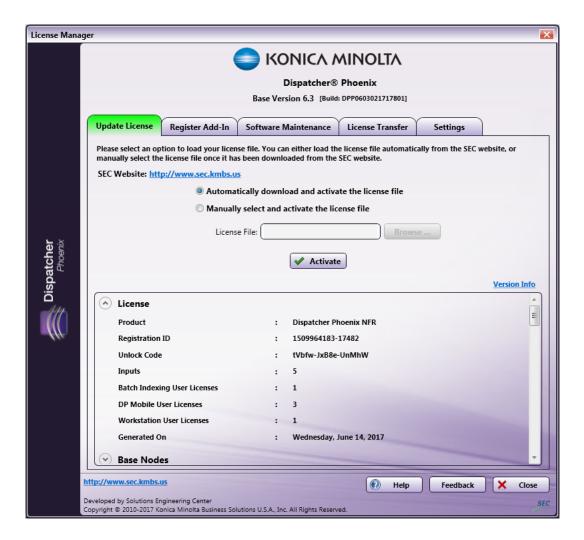
To restore the license, you may let **Dispatcher Phoenix** reactivate itself via the web or you may choose to manually restore the license file.

- To automatically restore the license file, click on the Automatically download and activate the license file radio button and select the
 Activate button. Dispatcher Phoenix will go to the SEC site, download the appropriate license file, re-install and re-activate that license.
- To manually restore the license, click on the **Manually select and activate the license file** radio button. Use the **Browse** button to locate and select the original downloaded license file. Once selected, click **Activate** to re-activate the license.

Update License

When you select **Help > License Manager...**, the License Manager appears with the **Update License** tab activated. You can update your license file using this window in the event of a license file becoming unreadable or tampered with.

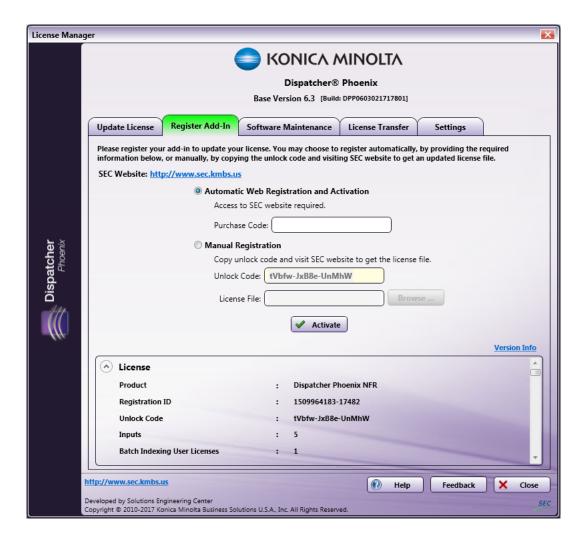
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Register Add-In

When you select **Help > Register Add In...** the License Manager appears with the **Register Add-In** tab activated. You can register your add-in modules using this window.

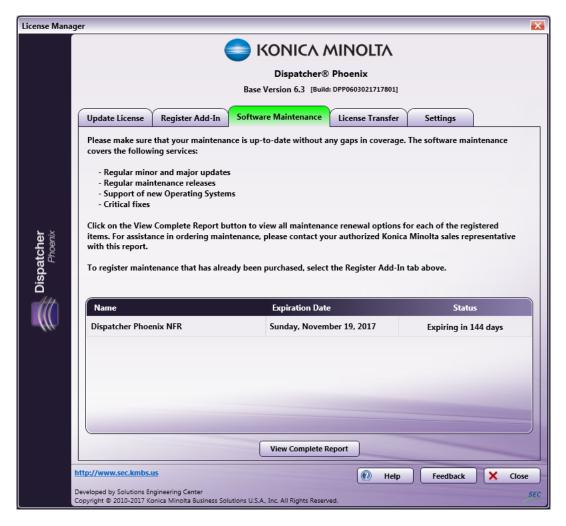
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Software Maintenance

To view information about your application's Software Maintenance, select **Help > Software Maintenance**. The License Manager will launch with the Software Maintenance tab open, as in the following illustration:

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This window lists all the components of your Dispatcher Phoenix installation (main application and add-in modules) along with Expiration Dates and current Maintenance Expiration statuses.

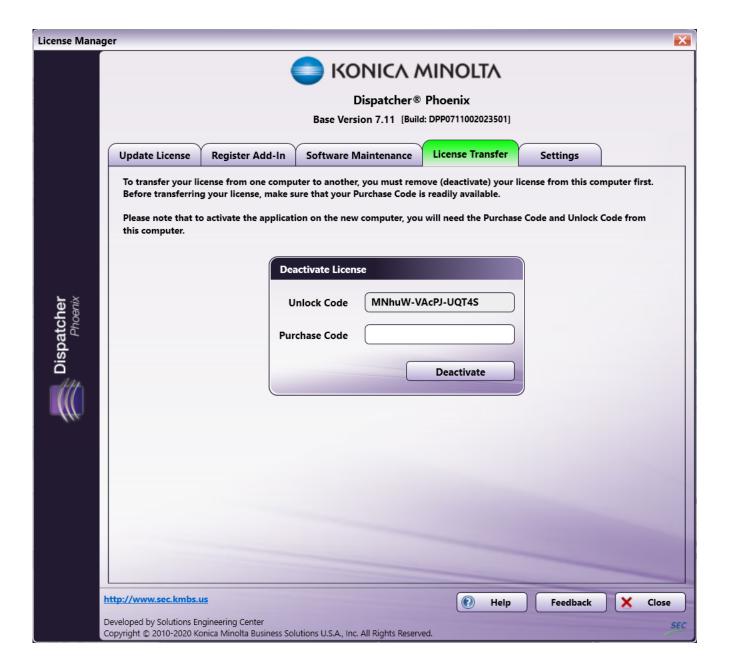
To view your maintenance renewal options, select the **View Complete Report** button. See the following section for more information on maintenance.

License Transfer

To transfer your license of Dispatcher Phoenix from an old computer to a new one, you will need to use the License Transfer feature.

To transfer your license, do the following: Launch Dispatcher Phoenix; then select **Help and License Transfer**. The License Manager will launch, as in the following illustration:

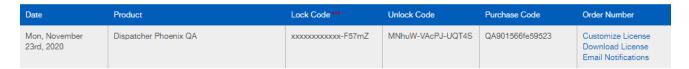
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Online Deactivation

To automatically deactivate your license, do the following:

1. Find the application's Purchase Code. Your Purchase Code can be found in an email from the SEC, printed on the certificate that came with the Dispatcher Phoenix DVD, or by logging into the **SEC Website** under the **MySEC tab** and **Registration History**, where you can also find your Unlock Code. See the following illustration:

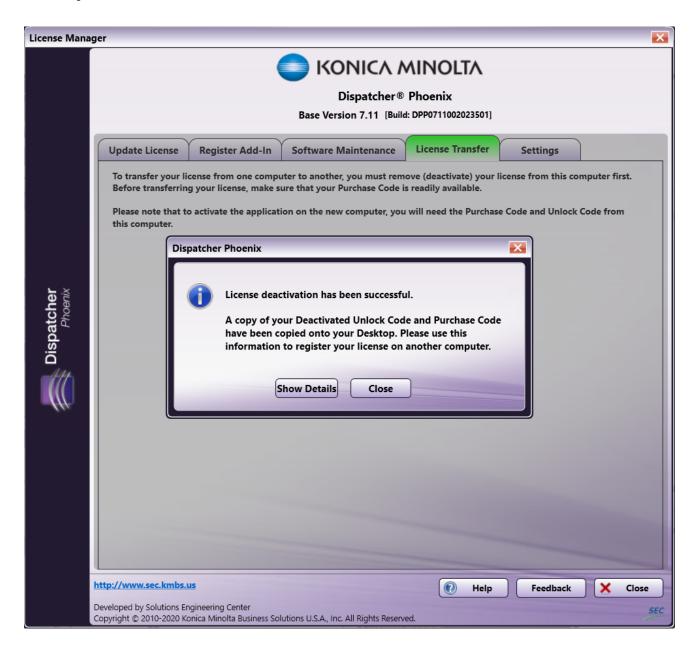


Note: You must log into the SEC Website User Account that registered the Dispatcher Phoenix license. Contact your Support Channel if you do not know the User Account that registered the license or need help signing into the account.

- 2. Paste/enter the product's Purchase Code into the **Purchase Code** field.
- 3. Select the **Deactivate** button.

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4. Select **Yes** on the confirmation message that appears. Another message will appear, stating that License deactivation has been successful, as in the following illustration:



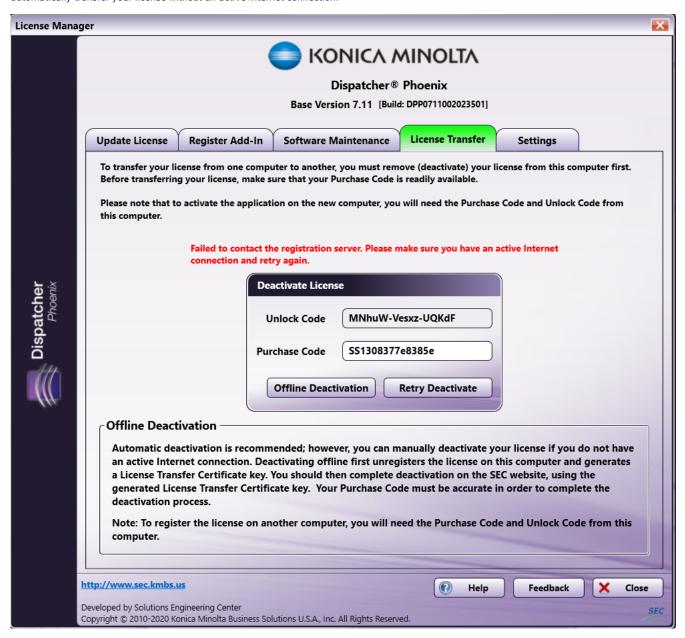
 Select the Show Details button on this message to view the License Deactivation notice. Copy the Deactivated Unlock Code and Purchase Code, as you will need to enter these to reactivate your Dispatcher Phoenix license. This information can also be found by logging into the SEC Website under the MySEC tab and Registration History.

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Offline Deactivation

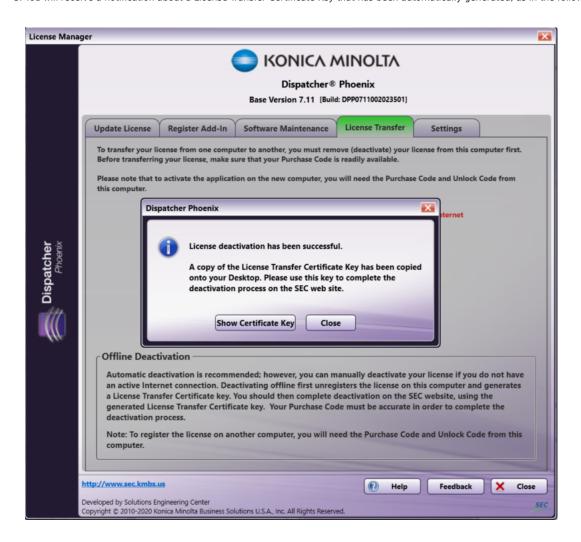
If you do not have an active internet connection, you will have to manually deactivate your license. The following screen will appear when you try to automatically transfer your license without an active internet connection:



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Do the following:

- 1. Select the Offline Deactivation button.
- 2. Select **Yes** on the confirmation message that appears.
- 3. You will receive a notification about a License Transfer Certificate Key that has been automatically generated, as in the following illustration:



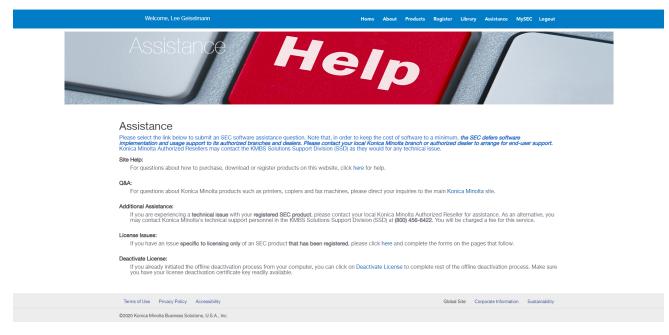
4. When you select the **Show Certificate Key** button, an Offline Deactivation notice will open with your License Transfer Certificate Key, Deactivated Unlock Code, and Purchase Code. Copy this information. See the following illustration for an example:

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Offline Deactivation					
Please use the following information to complete the next step in the offline deactivation process.					
License Transfer Certificate Key:	UJNSMZA4Mzc3ZTg=OOV1fDE2MTEyNjAzMTZ8Mj1kNTk5MTdhZj QSMmUJMGMSNmJkZjRKNNQ3OTEINTc=				
Deactivated Unlock Code:	MNhuW-Vesxz-UQKdF				
Purchase Code:	SS1308377e8385e				
Follow the steps below to complete the deactivation process.					
STEP 1: Copy the License Transfer Certificate Key listed above (without spaces). STEP 2: Open a Web Browser and go to SEC Website. http://sec.kmbs.us STEP 3: Login using your SEC credentials. STEP 3: Lick on the Assistance tab. STEP 5: Lick on the Assistance tab. STEP 5: Click on the Deactivate License link. STEP 6: Paste the License Transfer Certificate Key into the Certificate Key field; then select the Submit button. STEP 7: Once deactivation has completed, you can use the Deactivated Unlock Code and Purchase Code (listed above) to register your license on another computer.					
Thank You, Your support of Konica Minolta solutions is appreciated.					

Note: Make sure that you do not copy any spaces.

- 5. Now you can register your license on a new computer, using the Deactivated Unlock Code and Purchase Code listed above.
- 6. Go to the **SEC Website** and log in with your SEC credentials. Click on the **Assistance** tab, then the **Deactivate License** link, as in the following illustration:



Note: You will need an active internet connection to do this.

7. Paste the License Transfer Certificate Key into the available field, as in the following illustration:

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Deactivate License

To complete your offline deactivation process:

- 1. Provide your License Transfer Certificate Key in the field below.
- 2. Click the Submit button.
- 1 If you do not have one of these codes or are not sure of how to get them, please refer to the "Help" or "Assistance" sections of this site.

 $\textbf{License Transfer Certificate Key:} \ \overline{\text{U1MxMzA4Mzc3ZTgzODVIfDE2M}} \\ \text{TEyNjAzMT}$ Z8MjilkNTk5MTdhZjQ5MmU1MGMxNmJkZjRk NWQ3OTE1NTc=

Submit

- 8. Select the **Submit** button.
- 9. You may then reregister your license on your new device.

Deactivating Licenses for Inaccessible Systems

If the computer on which Dispatcher Phoenix is installed crashes or becomes inoperable and there is no way to recover the system to deactivate your license, you will need to request a license transfer using the **SEC Website**. Follow these steps:

- 1. Log into the **SEC Website** and select the **Assistance** tab.
- 2. On the **Assistance window**, under License Issues, select the **click here** link as in the following illustration:

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- 3. The SEC Policy screen will appear next; select the **Continue** link to affirm that you've read, understood, and agreed with SEC licensing policy. On the following screen, you will see a list of what you need in order to request a license transfer; select the **Next** button when you are ready.
- 4. On the Licensing Agreement that appears next, select the **I Agree** link at bottom of page to signify that you have read, understood, and agree with the licensing agreement. On the Summary screen that appears, select **I Agree**.
- 5. On the Product Information screen that appears, choose the **Product Name**; then paste the **Purchase Code** and **Original Unlock Code** into the appropriate fields. Enter a **Reason for Re-Issue** for your request in the text field provided. Select the **Next** button when you are done. See the following illustration for an example:

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License Re-Issue

Product Information

On the form below, please enter all the information regarding your initial purchase and licensing issue request. This may require access to the original e-mails sent from the SEC server. Much of this information may also be acquired through your **MySEC** page. To access your MySEC page, simply click the **MySEC** link at the top right of any page and navigate to the specific information you need. Required fields are marked with a *.

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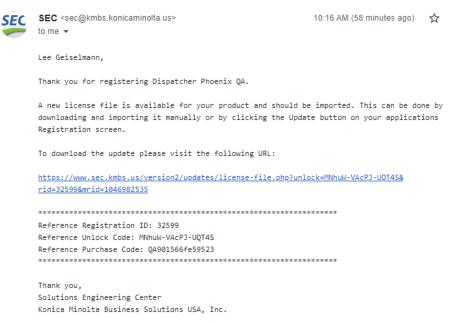
Without limiting the foregoing, copying or reproduction of the Software to any other server or location for further reproduction or redistribution is expressly prohibited, unless such reproduction or redistribution is expressly permitted by the License Agreement accompanying such Software.



- 6. On the Licensing Agreement that appears next, select the **I Agree** link at bottom of page to signify that you have read, understood, and agree with the licensing agreement. On the Summary screen that appears, select **I Agree**.
- 7. At this point, your request is submitted. Upon evaluation, you will receive an email listing your license transfer information. See the following illustration for an example:

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Konica Minolta Product Registration Inbox X



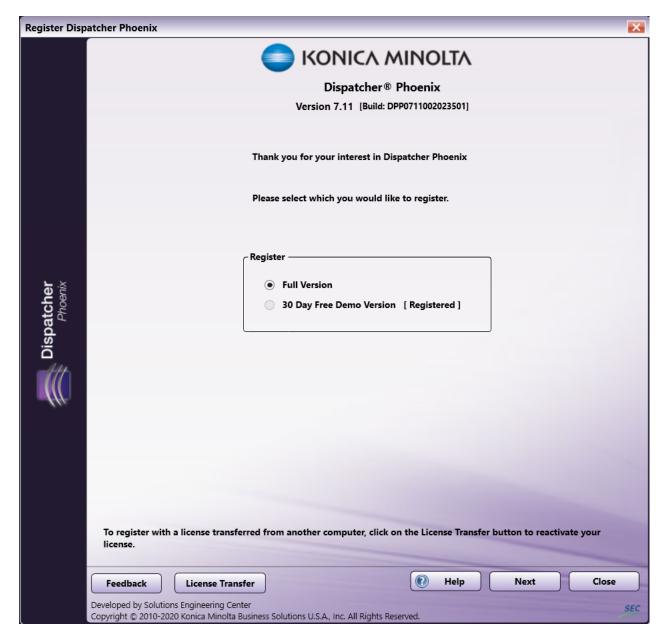
8. You may then reregister your license on your new device.

Activating Registration on a New Computer

After deactivating your license, you must register Dispatcher Phoenix on your new computer. The Registration screen includes a "License Transfer" option that allows you to easily reactivate your license. Do the following:

1. When the Register Dispatcher Phoenix window appears, click on the **License Transfer** button at the bottom of the window, as in the following illustration:

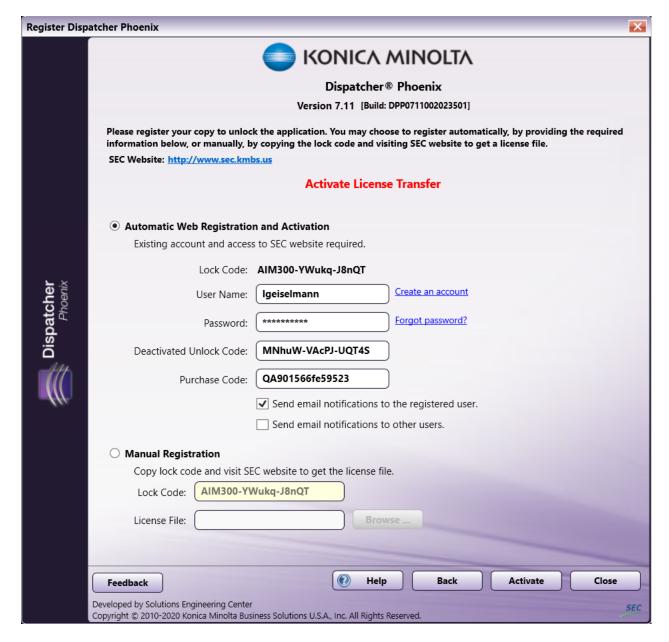
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Note: if you try to register a "Full Version" when transferring a license, you will receive an error that "Registration Failed. Cannot register the product because the purchase code has no licenses remaining."

2. Enter the necessary information into the User Name, Password, Deactivated Unlock Code, and Purchase Code fields, as in the following illustration:

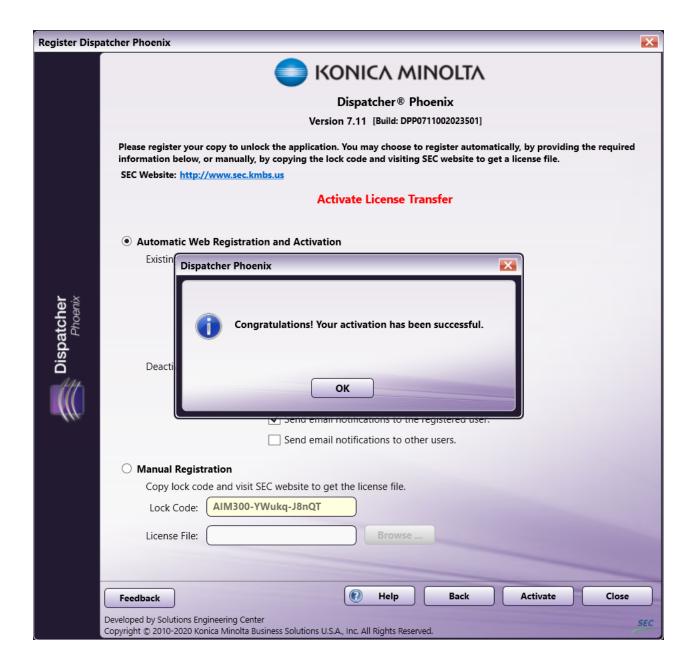
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Note: The Deactivated Unlock Code and Purchase code can be found by logging into the **SEC Website** under the **MySEC** tab and **Registration History**.

- 3. Select the **Activate** button.
- 4. You will receive a confirmation message indicating the transfer was successful, as in the following illustration:

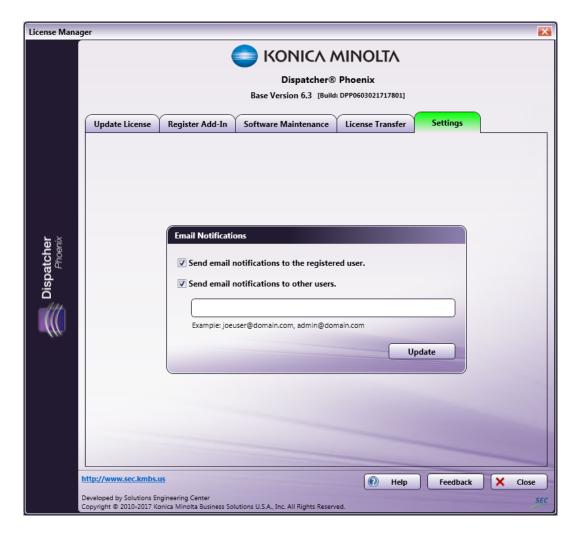
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Settings

When you select **Help > License Manager**, and then select the **Settings** tab, you can specify how to get email notifications. If you choose **Send email notifications to other users** you can enter email addresses separated by a comma, space, or semicolon.

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License Usage Report

The **License Usage Report** is a dynamically generated report that tracks license usage across the **Dispatcher Phoenix** platform. The License Usage Report:

- 1. Displays the number of inputs, devices and user licenses that are available and currently being used.
- $\ensuremath{\mathsf{2}}.$ Provides additional details about workflows that are using active inputs.
- 3. Provides information about the user licenses that are currently in use and available for Batch Indexing, Workstation, and Dispatcher Phoenix Mobile.

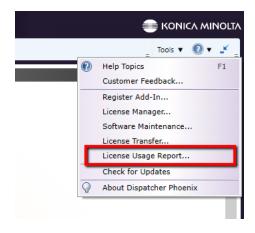
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Generating the License Usage Report

To launch the License Usage Report, do one of the following:

1. Click on the Help drop-down in the upper right-hand corner and select License Usage Report.



2. Click on the **Active Input count** displayed on the Workflow list.

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The License Usage Report is generated on demand. Once the report has loaded, you can do the following:

- · Collapse or expand the Workflow Activity area by clicking the workflow in the list.
- · Select the Refresh button to update the usage information displayed in the window.
- · Select the Close button to close the Usage Report.

Click here for more information on the Usage Report.

Installing Dispatcher Phoenix on an MFP

To register Dispatcher Phoenix on an MFP, do the following:

- 1. **Register the MFP.** Dispatcher Phoenix includes an MFP Registration tool that allows you to automatically discover MFPs on your network. To register an MFP, do the following:
 - 1. Open the Dispatcher Phoenix application.
 - 2. On the top right of the screen, select Tools, and then MFP Registration Tool...
 - 3. Select Find MFP.
 - Check the checkbox next to the MFP that you would like to register. Note that you can select multiple MFPs at once. Then, select the Select button.
 - 5. On the MFP Registration Tool's home screen, the **Status** column on the right will show which MFPs are registered and which are unregistered. Check the checkbox next to the unregistered MFP you would like to register, then select the **Register MFP** button.

For more details, please see the help for MFP Registration.

- 2. Build a new workflow with the Workflow Builder. Dispatcher Phoenix makes it easy to design advanced document workflows that are customized for your business needs. The next step to install Dispatcher Phoenix on an MFP is to build a workflow that includes the MFP Panel Node. To build this workflow, do the following:
 - 1. Open the Dispatcher Phoenix application.
 - 2. On the top navigation bar, select the New Workflow... icon. This will open the Workflow Builder in a new window.
 - 3. In the Collect area of the Workflow Builder, select the MFP Panel icon and drag-drop it onto the Workflow Builder canvas.
 - 4. Double click on the MFP Panel icon to open the MFP Panel Node window.
 - 5. In the Available Registered MFPs area, check the checkbox next to the registered MFP you would like to use, then select Add to Node. You can also select the registered MFP you would like to use and drag-drop it into the Selected MFPs area.
 - 6. Select Save when you have finished.
- 3. **Complete the Workflow**. Now that you have added a registered MFP to the **MFP Panel Node**, you will need to complete to the workflow. Do the following:
 - 1. In the Process area of the Workflow Builder, select any process node icon and drag-drop it onto the Workflow Builder canvas.
 - 2. In the **Distribute** area of the Workflow Builder, select any distribute node icon and drag-drop it onto the Workflow Builder canvas. The **Output Folder Node** is a good one to start with for beginners. Double-click on the **Output** icon to open the **Output Folder** window. Select the ellipses icon next to the **Choose an output directory**. Select a folder in your directory, then select **Select Folder**.
 - 3. Select **Save** when you have finished.
 - 4. Select a connector (red arrows on the left-hand side of the Workflow Builder) and then click the **MFP Panel Node** icon and then the process node icon. Select another connector and click the process node icon, and then the output node icon.
 - 5. Select the Validate icon at the top to check if the workflow is valid. You can do this by tapping the F12 key.

For more details, please see the MFP Panel Node page.

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Accessing Dispatcher Phoenix on an MFP

To access Dispatcher Phoenix at the MFP panel, do the following:

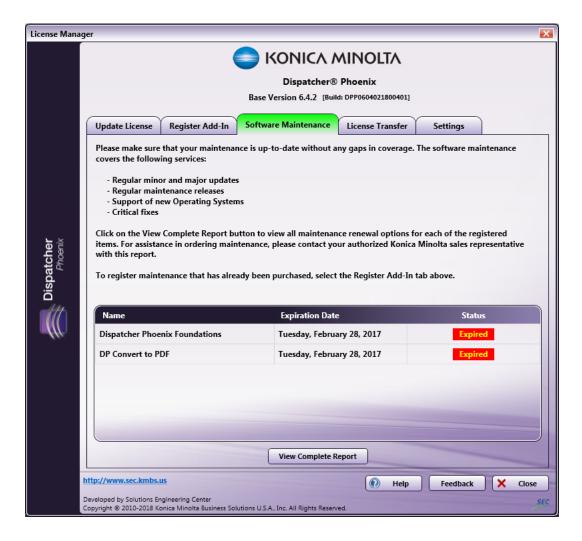
- 1. Open the Dispatcher Phoenix application, select the workflow that you built in the previous section, and then select **Start/Resume Workflow** icon at the top.
- 2. At the MFP panel, navigate to the MFP's Home screen.
- 3. Tap the APP button.
- 4. Tap the **Dispatcher Phoenix** button.
- 5. If you have configured your MFP to prompt for user authentication, log in with your username and password, then tap the arrow button.

For more details, please see the MFP Panel Node - Running a MFP Panel Workflow page.

Updating Maintenance

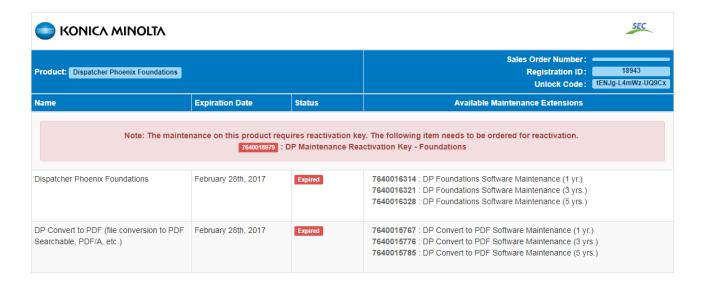
To update your Dispatcher Phoenix maintenance license, do the following:

- 1. Contact your Konica Minolta representative to purchase a maintenance update. A certificate will be shipped to you with a purchase code.
- 2. Open Dispatcher Phoenix, then open the License Manager. You can open the License Manager by going to the upper right hand corner, clicking on the Help icon, then clicking on **License Manager**.
- 3. Select the **Software Maintenance** tab and it will show that your status is expired, as shown in the illustration below:

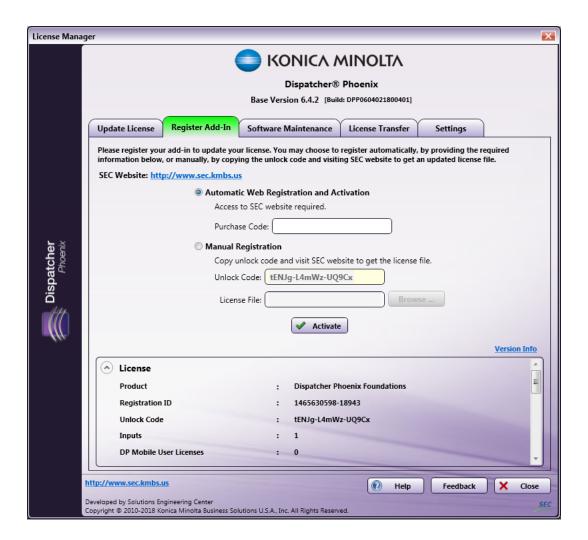


4. To view more details, click on View Complete Report. A page will open in your web browser, as shown in the following illustration:

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5. Select the **Register Add-In** tab. Select the **Automatic Web Registration and Activation** radio button, and then enter your purchase code in the **Purchase Code** field. Then, click on **Activate**.



6. A congratulations pop-up will confirm that you have successfully updated your maintenance license.

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Building and Running Workflows

Using the Main Application Screen

Launching Dispatcher Phoenix the First Time

After successfully installing Dispatcher Phoenix, follow these steps to launch the application:

- 1. Double-click on the **Dispatcher Phoenix** icon. The application will load and prompt you for your login credentials.
- 2. Enter your login credentials.

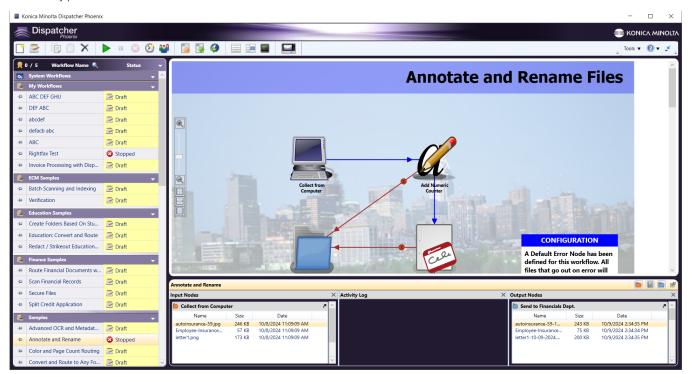
Important!

- When logging in with Microsoft Entra ID, **Workflow Services Manager** must be set up first to accommodate it. Once it is set up, you will be able to type your Entra ID into the User Name field.
- When using a Microsoft login, it will be available in the drop-down menu.

Application Elements

The main window contains the following elements:

- · Tool bar
- · Workflow list
- Preview area
- · Activity panes



Tool Bar

On the main application screen, the tool bar at the top of the screen contains icons and pull-down menus that will help you use the application.

Icons

The toolbar icons include:

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Icons	Description
	New Workflow - Opens the Workflow Builder, allowing you to create a new workflow.
	Edit Workflow - Opens the Workflow Builder for the highlighted workflow.
	Copy Workflow - Copies the selected workflow.
	Paste Workflow - Pastes the workflow, which was previously copied to the clipboard, back into the Workflow List.
×	Delete Workflow - Deletes the selected workflow.
	Start/Resume Workflow - Starts running the selected workflow or resumes running of a paused workflow.
88	Pause Workflow - Pauses the active workflow.
8	Stop Workflow - Stops the selected workflow.
S	Schedule Workflow - Opens a panel to define a schedule for the selected workflow.
	Toggle Shared Status - Clicking on this icon when one or more workflows are selected designates the workflow(s) as 'shared,' meaning that anyone else who has access to the computer can use that running workflow. Shared status can be toggled on or off. Once shared, a Shared icon will appear next to the workflow in the Workflow List.
	Import Workflow - Imports an existing workflow.
	Export Workflow - Exports and saves a workflow as a *.wfxp file.
4	Online Samples - Launches a Web page that contains sample workflows for you to view and download.
	Show/Hide Workflow List - Shows or hides the Workflow Lists in the upper left part of the screen.
	Show/Hide Workflow Preview - Shows or hides the Workflow preview.
	Show/Hide Workflow Activity - Shows or hides the Activity Panes.
	MFP Simulator - Launches the Dispatcher Phoenix MFP Simulator Tool.

Tools Menu

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The Tools menu in the upper right corner of the screen provides access to many of the application functions and tools. Options include:

- Toggle Shared Status Clicking on this menu item when one or more workflows are selected designates the workflow(s) as 'shared,' meaning that anyone else who has access to the computer can use that running workflow. Shared status can be toggled on or off. Once shared, a Shared icon will appear next to the workflow in the Workflow List.
- Pause running workflow(s) Pauses all of the workflow(s).
- Resume paused workflow(s) Resumes the paused workflow(s).
- Export Workflow... Exports the selected workflow.
- Import Workflow... Imports an existing Dispatcher Phoenix workflow.
- Import Sample Workflow... Imports one of the available sample workflows.
- Reinstall Sample Workflow... Reinstalls all sample workflows that come with the application.
- Online Samples... Enables you to view and download sample workflows.
- Documentation Library Launches a page on the SEC website that gives you online access to reference material on the application.
- Language Opens up the Language Manager so that you can choose your preferred language.
- Log Viewer... Enables you to view the log files for any workflow.
- Switch to Compact Mode Reduces the view to show the Workflow List and menu icons only.
- Enable Animations Select whether or not to show animations while the workflow runs.
- Animation Speed Set the speed of workflow animations to real-time or slower.
- MFP Registration Tool... Launches the MFP Registration Tool.
- MFP Simulator... Launches the interactive Dispatcher Phoenix MFP Simulator tool.
- Barcode Generator Launches the Barcode Generator Tool.
- Bubble Sheet Generator... Launches the Bubble Sheet Generator Tool.
- Index Form Builder... Launches the Index Form Builder Tool.
- Dispatcher Phoenix Web... Launches Dispatcher Phoenix Web (from a Dispatcher Suite installation only).
- Dispatcher Paragon... Launches Dispatcher Paragon (from a Dispatcher Suite installation only).
- Options... Allows an administrator to configure settings for the application.

Shared Workflows

Specifically designed for Active Directory users running workflows, shared workflows allow multiple users to have access to the same workflow from the MFP control panel. With this functionality, a "Scan To Home" feature can be used where documents go directly to a user's specific Active Directory folder.

Shared workflows are identified on the control panel and also within Dispatcher Phoenix with the following icon:



Note: A shared workflow's state cannot be modified by other users.

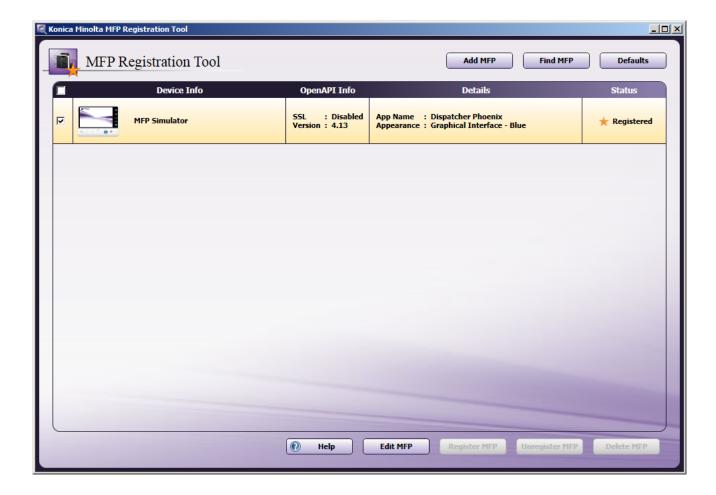
When logged into Windows as a different user, shared workflows will be listed with a grayed-out icon next to them.

You can also assign workflows to specific users using the Dispatcher Phoenix Web's Sharing app. When a workflow is shared with a specific user, the following icon will appear next to it in the workflow list:

MFP Registration

Using the MFP Registration Tool, you can register MFPs to be used by Dispatcher Phoenix for workflows. The Dispatcher Phoenix Web interface also includes a Devices Tool for discovering, registering, and editing devices. Go here for more information on the web-based Devices Tool.

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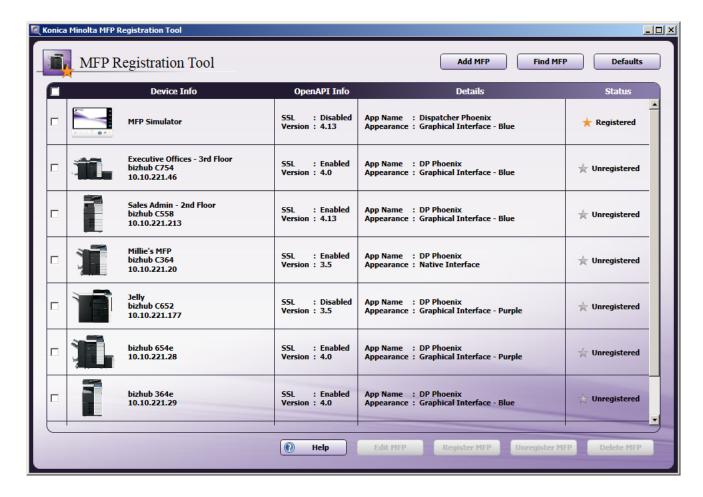


After launching this tool, you can do the following:

- Click the Add MFP button to enter the specific device information of the MFP that you are interested in (using the Add MFP window).
- Click the Find MFP button to start an automatic search for all available MFPs on the network (using the MFP Explorer tool).
- Click the **Defaults** button to configure the location of the bEST Application Server, user authentication options, and additional info. These settings will be default settings for all registered MFPs.
- Click the **Edit MFP** button to configure MFP, user authentication settings, and additional info for a specific MFP. These settings will be applied only to the selected MFP.
- Click the **Register MFP** button to register the selected MFP or **Unregister MFP** to unregister the MFP.
- Click the **Delete MFP** button to remove the selected MFP(s) from the list. Only unregistered MFPs may be deleted. To delete a registered MFP, you must unregister it first.

Once the MFP Registration Tool has been populated (either manually or automatically), the window will resemble the following illustration:

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- Device Info This column shows the model and IP address of the MFP, as well as any optional names for the printer.
- OpenAPI Info This column shows whether SSL is enabled or disabled, as well as the OpenAPI version on the MFP.
- Details This column shows the name of the application that is registered, as well as the panel appearance on the MFP.
- Status This column shows whether the MFP is registered or unregistered, as well as the status of the registration process.

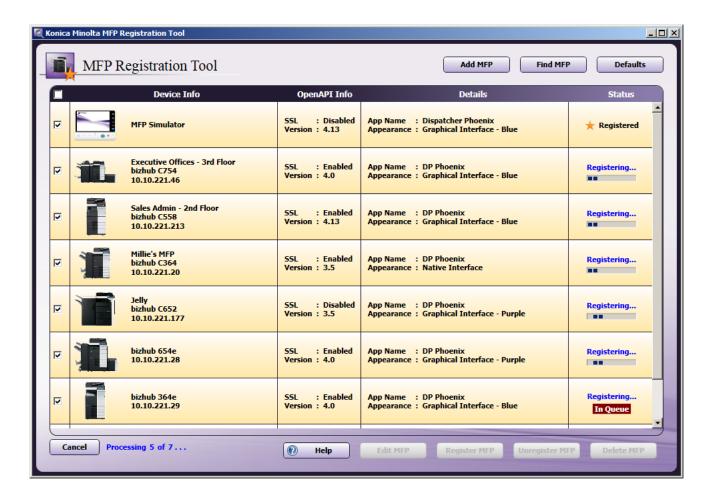
Register/Unregister MFPs

Check the box(es) next to the MFP(s) that you would like to register or check the **All** box (located above the first column) to select all listed MFPs; then click on the **Register MFP** button.

Once done, the Status will change to Registered. To unregister the MFP, select the device from the list; then select the Unregister MFP button.

If you are registering a large number of MFPs at once (e.g., 100 MFPs), the MFPs will be registered concurrently, five at a time, with the rest put in a queue. A registration bar will appear to indicate which MFPs are currently being registered. If you cancel the registration process by clicking on the **Cancel** button on the bottom of the window, all remaining MFPs will be removed from the queue and all current processing MFPs will continue to process. See the following illustration for an example of the "Registering..." and "In Queue" statuses:

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If registration fails, a "Failed" message will appear in the Status column. Click the **Help** icon to view a detailed message about why registration failed, as in the following illustration:

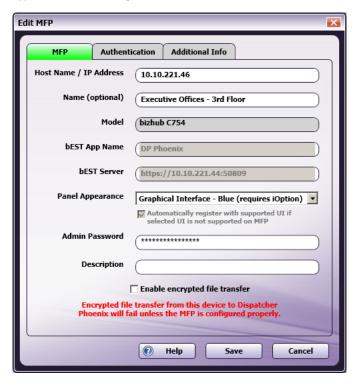


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Note: If the "Automatically register as Native UI if Graphical UI is not supported on MFP" option is not enabled (when adding an MFP) and the MFP does not have the i-Option installed or licensed, it cannot be registered with a 'Graphical User Interface' panel appearance defined.

Edit MFPs

To edit the settings of an individual MFP, select it from the list (or click on its check box); then click on the **Edit MFP** button. The Edit MFP window will appear, as in the following illustration:



On this window, you can change the MFP and user authentication settings for the individual MFP.

Note: Any changes made to this window are saved but not applied to or validated against the MFP until the MFP is registered (or unregistered and then registered again).

Changing the Panel Appearance: To change the defined panel setting appearance from graphical to native or vice versa, you must first unregister the device. If you are switching between the graphical interfaces (blue and purple), then you do not have to unregister the device.

Security: For certain MFPs, an **Enable encrypted file transfer** box will also appear on the Edit MFP window to enable you to encrypt your documents. Once the box is checked, you must configure the MFP as well. At the MFP, do the following:

- 1. Select the **Utility/Counter** key on the MFP panel.
- 2. Press the Administrator Settings button on the Utilities screen. The Password screen will appear, as in the following illustration:



3. Enter the administrative password; then press the **OK** button.

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4. On the Administrator Settings screen, press the **Network Settings** button. The Network Settings screen will appear. Press the **Forward** button, as indicated in the following illustration:



5. On the second Network Settings screen, select the WebDAV Settings button, as in the following illustration:



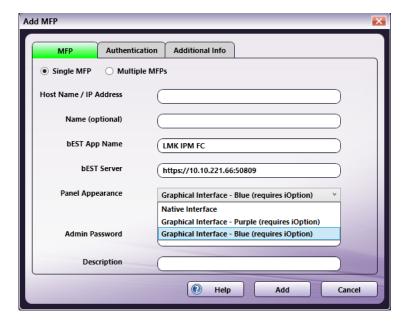
- 6. On the WebDAV Settings screen, select the WebDAV Settings Client Settings button; then press the Forward button two times.
- 7. At this point, you will see a button for **Chunk Transmission**. This option must be enabled.
- 8. Select the **OK** button when you are done.

Manually Adding An MFP

If you know the information for a specific MFP that you would like to register, select the Add MFP button.

MFP Tab

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To add a single MFP, do the following:

- In the Host Name / IP Address field, enter either the Host Name or IP Address for the MFP device.
- In the **Name (optional)** field, enter a descriptive name for the MFP. This name is separate from the model name. This name will correspond with the **Device Name** in Dispatcher Paragon (if applicable).
- In the **bEST App Name** field, enter a unique name for your application as it will appear on the MFP panel.

Since the bEST App Name will be displayed on the MFP panel, as will the names used by any other user with access to the MFP, the name must be unique among all users. If a name is already in use by another installation of Dispatcher Phoenix, you will be prompted to either change the name or take over the registration.

Should you choose to take over the registration, your application will be run when the named panel button is pressed, not that of the original user's. Care should be taken when taking over a registration as the other user is not notified of this change.

You will not be presented with the takeover option if the application name used is being supplied by another software program (such as DocuBreeze or PageScope Enterprise Suite) which uses application names on the panel. Your only option will be to change the name of your application.

Additionally, upon takeover, the original user will lose the ability to use the application on the MFP and will receive an error message when attempting to unregister the device. The user can forcefully change the status to unregistered. This will allow them to re-register the device in order to put it to use again. There is also the option to say **No** to the forced unregistration. If the user believes that this notification may be in error, due perhaps, to the MFP being busy processing at that moment and unable to receive outside commands, they may select the No button and retry the registration.

Important! If an MFP is unregistered, all workflows using that node/device will stop working.

- In the **bEST Server** field, the URL for the bEST server is displayed by default. You can customize this URL for advanced networking situations (e.g., bEST Server is registered on a different server, bEST Server is embedded into IIS, Dispatcher Phoenix is installed on a VM with NAT networking, etc.)
- From the **Panel Appearance** drop-down list, choose a panel appearance for the application. The options include Native Interface and Graphical Interface (Requires iOptions).
- To avoid registration failure over panel appearance options, you can check the Automatically register as Native UI if Graphical UI is not
 supported on MFP box. With this option enabled, the MFP will be automatically registered as a Native UI if it is does not have Graphical UI
 support (and the Graphical User Interface option is specified for that MFP).
- In the Admin Password field, enter the password required for administrative access to the MFP.
- In the Description field, enter a description of the MFP. Not required, but it can make the MFP easier to recognize when there are multiples.
- Once all of the information is entered, select the Add button and the MFP device will appear in a list on the MFP Registration Tool screen.

Bulk Import

To perform a bulk import of MFPs, select the **Multiple MFPs** radio button. Do the following:

- 1. Select the **Import...** button to add a list of MFPs. Note the imported file must be in CSV format and must include the Host / IP Address, bEST App Name and Admin password. The MFPs included in the imported file will appear in the Add MFP window.
- 2. Use the checkbox next to each MFP to select it.

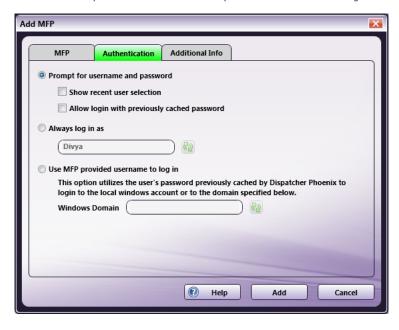
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3. Select the Add button to add and register the MFP devices.

① Since the bEST App Name will be displayed on the MFP panel, as will the names used by any other user with access to the MFP, the name must be unique among all users. If a name is already in use by another installation of Dispatcher Phoenix, you will be prompted to either change the name or take over the registration.

Authentication Tab

When defining a new MFP, you can also specify the authentication procedure for accessing workflows. By default, the user has to manually log in with a user name and password on the MFP control panel screen before accessing workflows.



- **Prompt for username and password** This is the default setting and requires the user to enter a username and password on the MFP control panel screen before accessing their workflow(s). With this setting, the following options are also available:
 - **Show recent user selection** With this option enabled, the user will be able to choose a user name from a drop-down list of the last 1000 users who have logged in, eliminating the need to manually enter this information; however, the password will still need to be entered.
 - Allow login with previously cached password With this option enabled, the user will be able to log in without entering a password. The
 previously entered password will be used.

Note: If the password is changed and the MFP is restarted, the cached password will then be lost.

• Always log in as - To minimize set up and quickly access your workflows on the control panel, you can choose to use your Windows log in name every time when accessing workflows. This option eliminates the need to manually enter a user name and password on the MFP control panel screen. With this option enabled, only the actively running workflows for that particular user will be displayed, and jobs scanned from the panel will run as that user. This field is pre-populated with the user name and domain name (if available) of the current user. The Refresh button next to the field allows you to reset the value to the currently logged-in user.

Note: If this field does not automatically populate, please enter the user name manually.

• Use MFP provided user name to log in - This single sign-on option is designed to work with MFP or Active Directory authentication. Optimal for shared workflows, this option will automatically log into Dispatcher Phoenix as the user logged into the MFP. With this option enabled, the Windows Domain field may be pre-populated with the current domain of the logged-in system, or the field may be left blank. Note that first-time use requires manually entering a password. See Appendix C for detailed information on how to connect your PC to a domain and set up the external authentication server in the MFP.

The Refresh button next to the field allows you to reset the value to the current domain.

Important! If you attempt to use the native interface without first having logged into Dispatcher Phoenix, the MFP will not prompt you for for a password, meaning it will not be possible to log in. For this reason, it is recommended that you use the graphical interface.

Note: If this field does not automatically populate, please enter the domain name manually.

Notes:

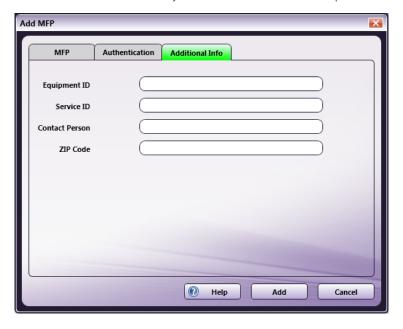
- · Any authentication changes made on this tab will only apply to newly defined MFPs, not existing MFPs.
- · If you change your Windows user name and password, you will not be able to access your workflows.

Additional Info Tab

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On the **Additional Info** tab, you can enter additional information about the equipment. The values in this field do not affect functionality or performance and is just for your own note keeping.

Note: The Additional Info tab is only available within installations of Dispatcher Suite.



- Equipment ID Enter identification information for the equipment.
- Service ID Enter identification information for service.
- Contact Person Enter information about the contact person.
- ZIP Code Enter information about the ZIP Code.
- Select the **Save** button when you are done.

Switching Panel Appearance Themes in Dispatcher Suite

Dispatcher Phoenix includes multiple panel appearance themes to customize your workflow. The panel appearance can be switched between a native interface, and two graphical interfaces (blue and purple).

To change the panel appearance, do the following:

- 1. Launch Dispatcher Phoenix Client.
- 2. From the $\pmb{\mathsf{Tools}}$ menu, select $\pmb{\mathsf{MFP}}$ $\pmb{\mathsf{Registration}}$ $\pmb{\mathsf{Tool}}.$
- 3. On the MFP Registration Tool, double click on the MFP where you would like to change the theme.
- 4. From the pop-up dialog, choose your desired interface for the panels appearance.

Dispatcher Suite

- Native Interface
- Graphical Interface Purple (requires iOption)
- Graphical Interface Blue (requires iOption)

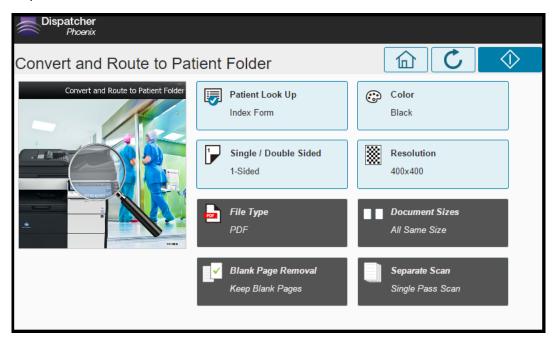
Note: The Graphical Interface - Blue option is only available on Dispatcher Suite installations.

Graphical Interface

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Graphical Interface - Blue



MFP Explorer Tool

To make MFP setup easier and more accurate, Dispatcher Phoenix includes an MFP Explorer tool. When launched from the MFP Registration Tool, the MFP Explorer will immediately search the currently configured network for any MFP devices. All results are displayed in the window, as in the following illustration:

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Note: MFPs paired with Fiery Controllers are represented by generic printer icons.

On the MFP Explorer Tool, you can do the following:

- Check the **boxes** of the MFP(s) that you are interested in, or check the **Select All** box to select all MFPs listed; then click on the **Select** button to return to the MFP Registration tool.
- Click on the **Settings** button to change the settings for the current network being searched. When you click this button, additional fields appear.

 You can do the following:
 - Choose the SNMP Version using the V1 and V3 radio buttons.
 - Modify the default broadcast address in the SNMP Broadcast field. The SNMP Broadcast tells the MFP Explorer on which network subnet to search for MFP devices. By default, this is set to 255.255.255.255, which will search on any and all accessible subnets. You may enter a more specific subnet to narrow the search.
 - Modify the default value for the search timeout in the **Timeout** field. The Timeout field may be set to limit the amount of time the MFP
 Explorer will spend discovering MFPs on the network. If there are a small number of MFPs on your network, this number should be left low.
 However, if there are a large number of MFPs, it is recommended that this number be increased. By default, the Timeout is set at 6 seconds with a maximum value of 300 seconds (5 minutes).
 - Modify the default passphrase for the SNMP community string in the SNMP Community (V1) field. The SNMP Community is similar to a
 passphrase given to each MFP. By default, Konica Minolta MFP devices have this phrase set to "public." If the MFP devices on your network
 have had this value changed, you may enter that passphrase here.
 - Select the **Restore Defaults** to revert any changes made to their default values.
 - Select the **Save** button to save your changes.
- Click on the **Search** button to begin the automatic search again.

Using The Defaults Window

The MFP Explorer's **Defaults** button (upper right corner of window) brings up the bEST Server Defaults window to configure the location of the bEST Application Server and user authentication options.

Default bEST Server Settings

The *bEST* service, installed locally on your PC with Dispatcher Phoenix, allows you to use this technology with compatible MFP devices on your network. By entering your IP address or Server Host Name, you let the MFP know where to find the service. This is especially important in the case of multiple IP addresses on a computer to tell the MFP which one to use.

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To set the location of the *bEST Application Server*, enter your IP address or Server Host Name in the **Server Host Name** / **IP Address** field. By default, the field is populated with the IP address of your computer. The **Refresh** button next to the field allows you to revert the value back to the current IP address of your computer.

In addition, you can specify default settings for your bEST applications on this window by doing the following:

- In the **bEST App Name** field, enter the name that you want to appear on the control panel to identify your applications.
- From the Panel Appearance drop-down list, choose how the workflow will appear on the control panel.
- The **Graphical User Interface** options will display the details of the scan settings for the workflow, along with a thumbnail image of the workflow itself. This is the default setting. Options are **Graphical Interface Purple** and **Graphical Interface Blue**.
- The Native MFP User Interface lists the workflow in a non-graphical, text-based manner; select this option for those devices that do not have the i-Option licensed and installed.
- To avoid registration failure over panel appearance options, you can check the **Automatically register as Native UI if Graphical UI is not supported on MFP** box. With this option enabled, the MFP will be automatically registered as a Native UI if it is does not have Graphical UI support (and the Graphical User Interface option is specified for that MFP).
- In the **Admin Password** field, enter a password that will be used automatically the next time you register a bEST application. A valid password is only required when first registering the app on the MFP.
- Select the **Save** button when you are done.

Note: Any changes made on this tab will ONLY apply to newly defined MFPs, not existing MFPs.

Default User Authentication Settings

You can change the user authentication settings for your workflows.

Options Window

The Options window, designed for administrators-only to configure various settings in the application, can be accessed from the **Tools** menu. On this window, you can configure the following:

- · General settings
- Software Updates
- · Usage threshold settings
- Log level settings
- DP Mobile settings
- LPR Service settings **OPTIONAL**
- · Database settings
- SMTP Service settings OPTIONAL

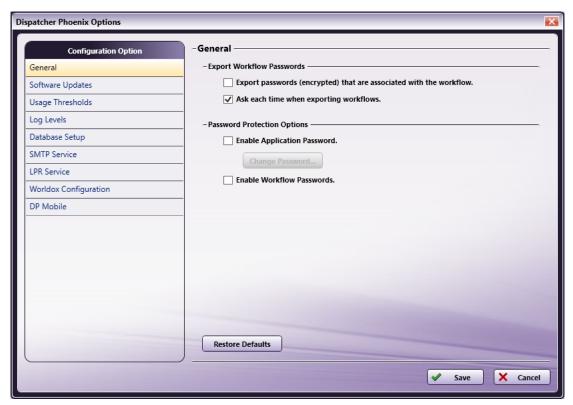
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• Worldox Configuration settings **OPTIONAL** - **Only available if the Worldox Connector is installed.**

Note: The LPR Service configuration option is only displayed if the LPR In node has been installed as an add-in. |

General Settings

When the Options window is first opened, the General configuration options are displayed, as in the following illustration:



Do the following:

- To always export any passwords with a workflow during a workflow export operation, check the **Export all existing passwords with workflow** box.
- If you do not want the Export Workflow Passwords message to appear each time you export a workflow, uncheck the **Ask each time when exporting workflows** box.
- To enable password protection for the launch of the application, check the **Enable Application Password** box. The Set Password pop-up window will appear, allowing you to enter and confirm a password. You will be asked to provide that password the next time the application is

If you uncheck this box, you will be prompted to enter the password before the setting can be disabled.

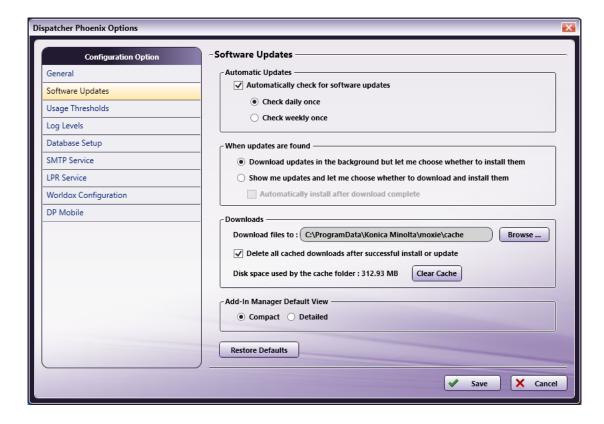
- To change the password that has been set, select the **Change Password** button. This button will appear grayed out until a password has been specified. The Change Password pop-up window will appear, allowing you to enter a new password.
- To enable password protection for workflows, check the **Enable Workflow Passwords** box. When this setting is enabled, a **Password Protection** option is available from the workflow's context menu (accessed when you right-click on a workflow in the Workflow List).
- To restore any changes made and go back to the default settings, select the **Restore Defaults** button.
- Select the **Save** button when you are done.

Software Updates Settings

Using the Software Update Settings, you can change the way Dispatcher Phoenix checks for and downloads updates. By design, Dispatcher Phoenix will only check for updates when the client is launched.

To modify software updates settings, click **Software Updates** under **Configuration Option**. The Software Updates settings resemble the following illustration:

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Automatic Updates

- By default, the application will automatically check for software updates when the client is launched. If you disable automatic updates, it is your responsibility to check for updates regularly (by clicking the **Check for Updates** item from the **Help** menu of the main application screen).
- If you want the application to check for updates every day when the client is launched, select the **Check daily once** radio button; alternatively, to check weekly instead of daily, select the **Check weekly once** radio button.

When updates are found

- By default, the application will download updates automatically and then alert you when the updates are ready to be installed. This is the
 Download updates in the background but let me choose whether to install them option. With this option, the Add-In Manager will be visible in the system tray.
- To check for updates automatically but have Dispatcher Phoenix alert you when it is time for both download and installation, select the **Check** for updates but let me choose whether to download and install them radio button. If you select this option, you can also choose to install the updates immediately after download is complete by checking the **Automatically install after download complete** box.

Downloads

- To modify the default folder to which the updates are downloaded, click the **Browse...** button and choose another location for downloads. This can be useful for slower network connections; one person can download updates to a common location on the network to which other users can point to as an easy way to update without downloading.
- By default, cached downloaded files are automatically deleted after install/update has completed. To disable this feature, uncheck the Delete all
 cached downloads after successful install or update box; to clear the cache manually, click on the Clear Cache button.

Add-In Manager Default View

To configure the appearance of the Add-In Manager, choose one of the following:

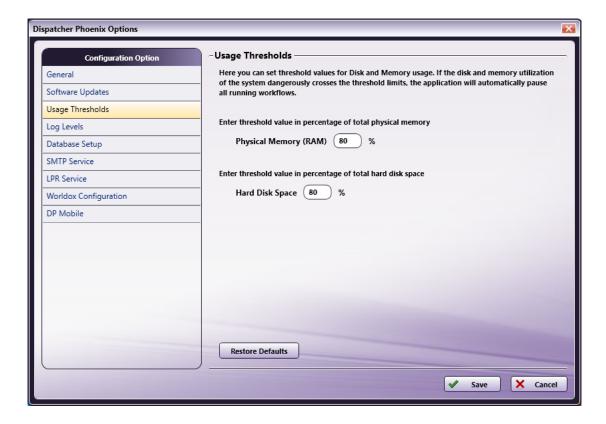
- Compact The default view shows a progress bar along with a product feature slideshow
- Detailed This view displays detailed progress messages along with the progress bar.

Usage Thresholds

To prevent any kind of performance disruption of the application, an administrator can specify threshold values for the amount of physical memory and/or hard disk space that can be used. Once these specified limits have been exceeded, all running workflows will pause and a warning message will appear.

To specify threshold values, click **Usage Threshold** under **Configuration Option**. The Usage Threshold settings resemble the following illustration:

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Do the following:

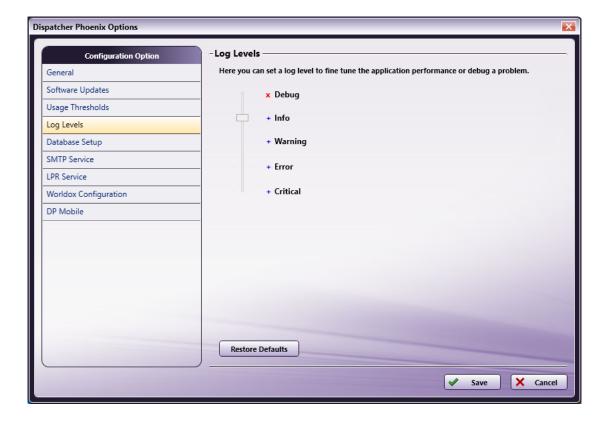
- Enter a percentage value in the Physical Memory (RAM) field to specify a threshold value for total physical memory.
- Enter a percentage value in the Hard Disk Space field to specify a threshold value for total hard disk space.
- To restore any changes made and go back to the default settings, select the **Restore Defaults** button.
- Select the **Save** button when you are done.

Important! Dispatcher Phoenix monitors the memory usage (by default, every minute) and disk space utilization (by default, every 30 minutes) for the entire system, not only the portion being used by Dispatcher Phoenix. It is possible for a system to exceed the specified memory usage and disk space utilization in between the periodic checks. If a periodic check reveals that the system has exceeded the specified parameters, it will send an alert and automatically pause workflows, preventing new documents from being processed; documents currently being processed will continue through the workflow. A system administrator will need to restart any affected workflows once the memory usage and disk space utilization have been returned to expected parameters.

Log Level

An administrator can specify what level of messages should be reported when a workflow is running. This configuration can be useful when debugging issues within the application. To specify threshold values, click **Log Levels** under **Configuration Option**. The Log Levels settings resemble the following illustration:

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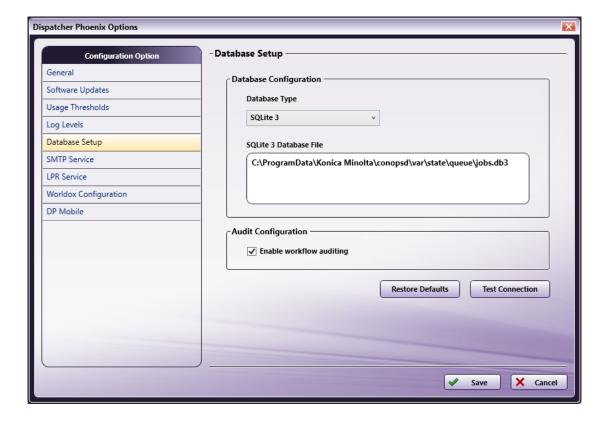
Do the following:

- Slide the **control** up and down to set the log levels:
 - A + (blue plus sign) indicates that it will be included in the log.
 - An **x (red x sign)** indicates that it won't be included in the log.
- To restore any changes made and go back to the default settings, select the **Restore Defaults** button. The default log levels are: *Critical, Error, and Warning.*
- Select the **Save** button when you are done.

Database Setup

By default, Dispatcher Phoenix comes installed with a SQLite 3 database file "C:\ProgramData\Konica Minolta\conospd\var\state\queue\jobs.db3" You will need to install SQLite 3 to open database files. If you want to use another, more robust server, click **Database Setup** under **Configuration Option**. The Database Setup settings resemble the following illustration:

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To switch to a Microsoft SQL Server, do the following:

1. Choose the Microsoft SQL Server option from the Database Type drop-down menu.

Note: You must have an instance of this database installed on your system.

- 2. Enter connection details for that database in the **ODBC Connection String** box.
- 3. Select the Test Connection button to test your connection string.
- 4. Select the **Restore Defaults** button to go back to the default database settings.
- 5. Select the **Save** button when you are done.

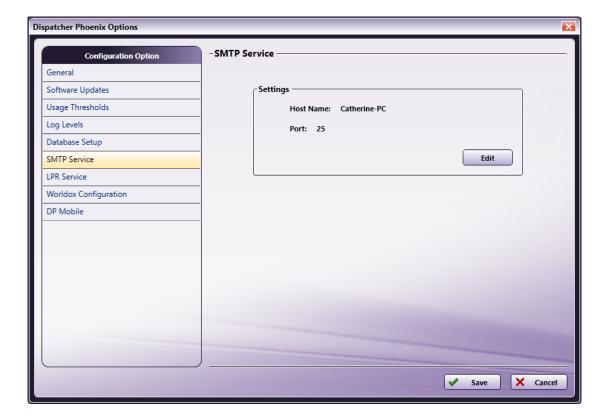
Note: The default SQLite database is recommended for single server systems only. Using SQLite in a clustered environment is not recommended since it does not offer redundancy or failover capabilities.

SMTP Service (Optional)

If the SMTP In node is installed, this option appears, allowing an administrator user to configure the settings of the SMTP Service that supplies files to the SMTP In node. The SMTP Service must be installed in order for the SMTP In node to function properly, and it must be configured to point to a machine where the SMTP In node is installed.

An administrator can view and/or configure the SMTP Service's settings by clicking on **SMTP Service** under **Configuration Option**. The SMTP Service settings resemble the following illustration:

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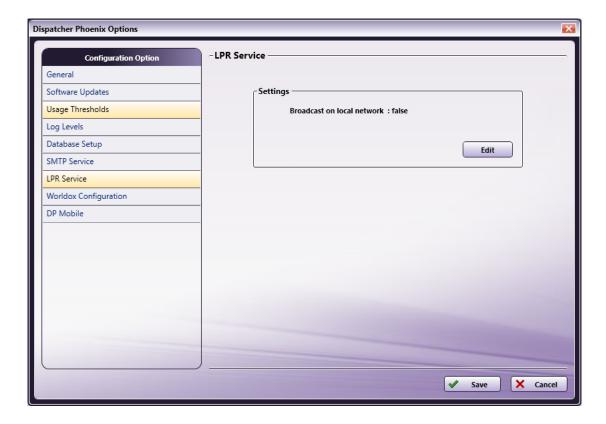
The Host Name, if specified, will appear along with the port number currently being used by the SMTP Service. The default port number is 25. To change these settings, select the **Edit** button. The **SMTP Manager** window appears.

LPR Service (Optional)

If the LPR In node is installed, this option appears, allowing an administrator to configure the settings of the LPR Service, including starting and stopping the service.

To view the current LPR settings, click LPR Service under Configuration Option. The LPR Service settings resemble the following illustration:

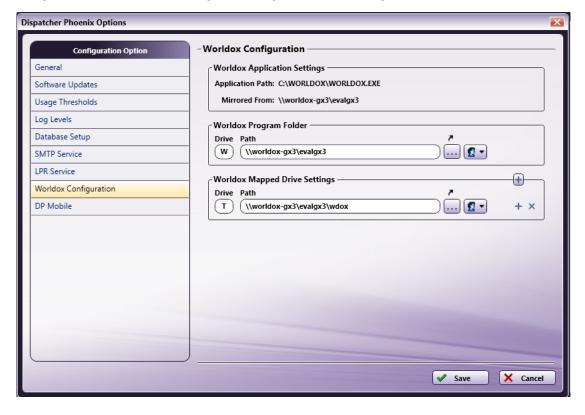
Konica Minolta 90 / 1597



To change these settings, select the **Edit** button to launch the **LPR Manager**.

Worldox Configuration (Optional)

If the Worldox Connector node is installed, this option automatically appears. Before using the Worldox Connector, you must first define general settings about Worldox. The Worldox Configuration settings resemble the following illustration:



Do the following:

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1. Specify the Worldox Program Folder.

If Dispatcher Phoenix is installed on a system that is mirroring the Worldox Server, you must specify the Worldox Program Folder. The path entered in the **Worldox Program Folder Path** field must be the same UNC path as the mirrored location. You can enter a drive letter of your choice in the Drive field; however, if the logged-in user already has Worldox mapped to a specific drive, that same drive must be used.

If using a network share, you must add network credentials by clicking on the **Credentials** icon. The user must be a user on the Worldox Server who has read/write access to that path.

Note: If Dispatcher Phoenix is installed directly on the Worldox Server, you do not have to specify the Program Folder.

2. Specify the Worldox Mapped Drive Settings.

The logged-in Windows User must have all Worldox Mapped Drives set up. Those settings need to be duplicated on this window for the SEC Workflow Services Account. Mapped drives are related to Worldox Profile Groups; each Profile Group has a base path that points to a mapped drive. Enter the path for the Profile Groups' mapped drive in the **Worldox Mapped Drive Settings Path** field. If there are additional mapped drives that need to be specified, click the + button to add another Drive / Path. The drive letter specified must be the same as what is used in Worldox. If using a network share, you must add network credentials by clicking on the **Credentials** icon. The user must be a user on the Worldox Server who has read/write access to that path.

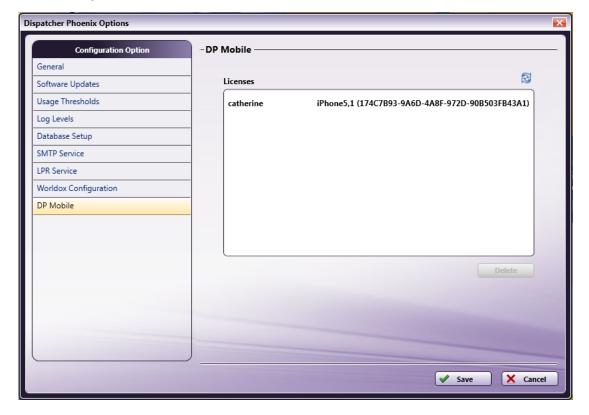
3. Select the **Save** button when you are done. You will then be prompted to enter the password for SEC Workflow Services.

DP Mobile Configuration

When using DP Mobile, you can view the users and devices that are currently being used. The DP Mobile Configuration settings window displays the users and the devices being used.

To free up a license, select a user / device and then select the **Delete** button. You can also refresh the list by clicking on the **Refresh** icon.

See the following illustration:



Help Topics

From the **Help** menu **(0**), you can choose the following options:

- Customer Feedback
- Register Add-
- In (or Register Product, if application is a Demo version)
- · License Manager

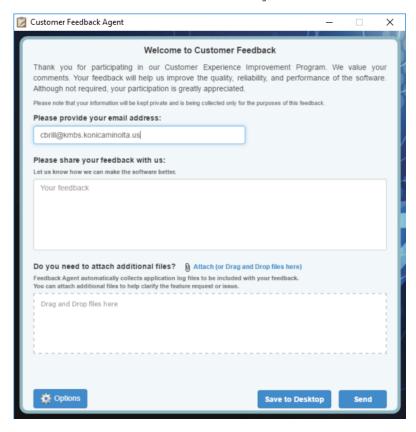
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- · Software Maintenance
- · License Transfer
- · Check for Updates
- About Dispatcher Phoenix

Customer Feedback

To send us feedback about the application or if you have experienced an error, select **Help > Customer Feedback**. You can also access this window by selecting the **Feedback** button on the **License Manager** window.

The Customer Feedback window resembles the following illustration:



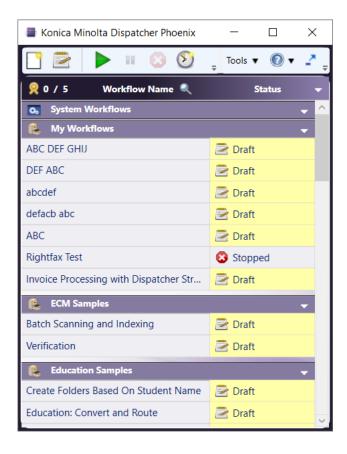
On this window, do the following:

- 1. In the Please provide your Email Address field, enter your email address.
- 2. In the **Please share your feedback with us** box, enter your feedback.
- 3. If you need to attach additional files you can either click on the **file clip** icon to browse for the files in Windows Explorer or drag-drop files to the empty box provided.
- 4. When you are done, select the $\textbf{Send}\ \text{button}.$
- 5. If you do not have an Internet connection at the current time but would like to send the feedback later, select the **Save to Desktop** button to save the feedback locally.
- 6. To configure specific settings for Customer Feedback, select the **Options** button. On the Options window, you can specify language preferences and any additional information that you would like submitted with the feedback (e.g., installed applications, installed Windows updates, etc.)

Compact Mode

If you click on the Switch to compact mode icon, the application will restart with only the Workflow List appearing, as in the following illustration:

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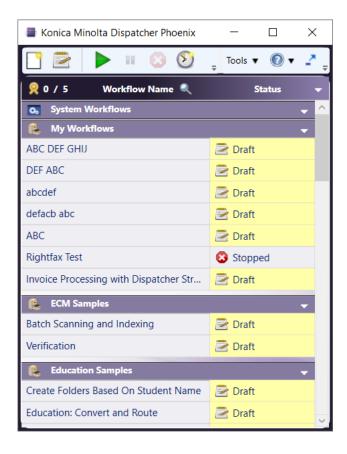
Workflow List

On the left side of the screen, the Workflow List displays the number of active inputs currently in use by your workflows, a list of the existing defined workflows, whether or not they can be accessed by other users (**shared**), and their **current activity status**. A workflow's status can be one of the following:

- Running The workflow is currently running.
- Paused Execution of the workflow is currently paused.
- Stopped Execution of the workflow has been stopped.
- Draft The workflow has been created but not run yet, OR the workflow has been edited and the modified workflow has not run yet.

Workflows are organized in user-defined folders. When a workflow is first created, it will automatically be placed in the folder you are currently in. If there are no user-defined folders defined, the newly created workflow will be placed in a default folder titled "My Workflows." A snapshot of your Active Input usage can also be seen in the upper left corner of the workflow list. The Workflow List resembles the following illustration:

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When you first launch the application, the Sample Workflows folder containing all sample workflows is created for you.

Workflow Search

At the top of the Workflow List is a magnifying glass icon . Clicking this button will open a search bar below the Workflow List header. Clicking the magnifying glass again will minimize the search area but maintain any search criteria.



Typing in the search bar will automatically begin filtering the available workflows, based on the following categories, which can be viewed by selecting the **Advanced Search** option:

- Workflow/Group Name (Selected by default) Searches through the names of workflows and groups for a match to the search criteria
- Node Type Searches all workflows for the original names of nodes that match the search criteria
- Custom Node Name Searches all workflows for nodes with updated names that match the search criteria
- · Node Description Searches all workflows for nodes with descriptions that match the search criteria



If there is anything in the search field, an **X** will appear on the right side of the field. This allows you to clear the field. Clearing the search bar will display the entire list of workflows.

Note: Entering a search term will expand any groups with workflows that meet the criteria. Clearing the search field will return all groups to their previous state of expanded or collapsed.

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Special Characters

There are a few characters that behave differently from others. The workflow search feature also supports wildcard search with * and =:

Name	Symbol	Description / Use
Asterisk	*	Searches for any string - Can be used at the beginning and/or end of a string only. Using this character within a string will search for the character, not the wildcard.
Equals	=	Searches for the exact string provided (case sensitive) - Can be used at the beginning of a string only. Using this character within a string will search for the character, not the wildcard.
Backslash	\	Commonly used as an escape character, this forces the next character to be taken at face value, rather than as a wildcard or other programming command. The only character that requires a backslash is the backslash itself. For example, if you want to search for the string "ABC\123", you will need to type "ABC\123" in the search field.

Note: Searching for * or = alone will search for those characters specifically.

Notes:

- If you use the = wildcard, it must appear at the beginning of the search or it will be interpreted as part of the search string. For example, if you search for =*ABC, the search feature will return all workflows that include "ABC" (case sensitive) with a string before it. If you search for *=ABC, the search feature will return all workflows that include "=ABC" (not case sensitive) with a string before it.
- For the purposes of search, a string can include 0 characters. For example, a workflow named "ABC" would appear as a search result for the search parameter *ABC and ABC*.

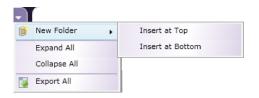
Examples

The following examples can help provide information on how to craft searches using wildcards:

Sample Search Text	Searches For:
=ABC	The string "ABC" (case sensitive) and nothing else.
*ABC	The string "ABC" with any character string before it. This would also find workflows with "abc", "aBc", "AbC", etc.
ABC*	The string "ABC" with any character string after it. This would also find workflows with "abc", "aBc", "AbC", etc.
=*ABC*	The string "ABC" (case sensitive) anywhere in a string.
=ABC*	The string "ABC" (case sensitive) with any character string after it.
=*ABC	The string "ABC" (case sensitive) at the end of the workflow name.

Workflow List Title Bar Context Menu

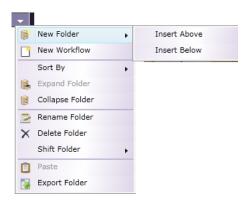
When you click on the down arrow or right-click on the Workflow List Title bar, the following menu will appear:



Folder Title Bar Context Menu

When you click on the down arrow or right-click on a Folder Title bar, the following menu will appear:

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Working With Folders

Using the context menus illustrated above, you can create folders, move folders, delete folders, and modify the appearance of the folders in the Workflow List.

Creating A New Workflow

The Folder Title bar's drop down menu contains a **New Workflow** option. Instead of using the menu bar icon, you can choose this option to create a new workflow (opening up the Workflow Builder).

Creating Folders

To create a new folder, do one of the following:

• On the **Workflow List** title bar, click on the down arrow; then choose **New Folder** from the menu that appears. You can choose to add the new folder either at the top of the Workflow List (**Insert at Top** option) or at the bottom of the Workflow List (**Insert at Bottom** option),

or

• On a Folder's title bar, click on the down arrow; then choose **New Folder** from the menu that appears. You can choose to add the new folder either before the current folder (**Insert Above** option) or below the current folder (**Insert Below** option).

Naming/Renaming Folders

When you first create a folder, it is named "New Folder" by default. To give the folder a more meaningful name or rename an existing folder, click on the **down** arrow on the folder's title bar; then choose the **Rename Folder** option from the menu that appears.

The name of the folder will be editable as in the following illustration:



At this point, you can enter a name for the folder; then either press the **Enter** key or **click anywhere** else in the application for the changes to take effect.

Note: You cannot name or rename a folder with a name that is already in use. Folder names must be unique.

Expand/Collapse Folders

The folders in the Workflow List can expand and collapse in the same way as Windows Explorer folders so that you can see more or less of each folder's contents.

To expand a folder so that you can see its entire contents, click on the down arrow on a folder's title bar; then choose Expand Folder on the
menu that appears.

Shortcut: Click on the folder's title bar to expand the list.

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To collapse a folder so that its contents do not take up any room, click on the down arrow on a folder's title bar; then choose Collapse Folder
on the menu that appears.

Shortcut: Click on the folder's title bar to collapse the list.

- To expand all folders in the Workflow List, click on the **down arrow on the Workflow List** title bar; then choose **Expand All** from the menu that appears.
- To collapse all folders in the Workflow List, click on the **down arrow on the Workflow List** title bar; then choose **Collapse All** from the menu that appears.

Move Folders

You can move the folders around the Workflow List to suit your purposes. To manipulate the position of the folder within the Workflow List, do one of the following:

- Drag-and-drop the folder in the correct position using your mouse, or
- · Click on the down arrow on the folder's title bar; then choose one of the Shift Folder options (Top, Bottom, Up, Down).

Delete Folders

To delete a folder, click on the down arrow on the folder's title bar; then choose the **Delete Folder** option from the menu that appears.

Note: Deleting a folder requires deletion confirmation. If the folder contains workflows, then all workflows in the folder will also be deleted.

Working With Workflows

Using the Workflow List, workflows can be acted upon either individually or as a group (either from the same folder or different folders).

Selecting Multiple Workflows

To select more than one workflow, click on the workflows while pressing the Shift or Control key.

Using The Workflow Context Menu (With Multiple Workflows)

Right-clicking on one or more selected workflows (from the same or different folders) brings up a context menu. The options on this menu perform the same functions as the icons on the menu bar.

For example, to run several workflows at the same time, you could either select the workflows from the Workflow List; then click on the **Start icon** or right-click and choose the **Start/Resume** option on the menu that appears.

Before multiple workflows are run, each workflow is validated. If one workflow fails validation, all selected workflows in the Workflow List will stop processing as well.

Commands can be performed on multiple workflows, regardless of their status. If a workflow is already running and is in a group of workflows that has just been selected to run, the application will ignore the already-running workflow and continue executing the other selected workflows.

All commands will only act on those selected workflows for which it is appropriate to act. For example, if you select to start a combination of running and stopped workflows, the Run command will act only the stopped workflows. Similarly, the "Pause" command will only act on the selected workflows that are appropriate to pause, skipping over the other selected workflows.

When stopping multiple workflows, a warning message will appear for each workflow if the workflow is currently processing files.

Scheduling Workflows

You can even create one schedule for multiple workflows by selecting the workflows from the list; then choosing the **Schedule Workflow** icon from the tool bar or right-clicking and choosing the **Schedule** option from the menu that appears.

Copy/Paste Workflows

If you want to create a new workflow that is very similar to one that already exists, you can choose to *copy* the workflow, then *paste* it into the Workflow List.

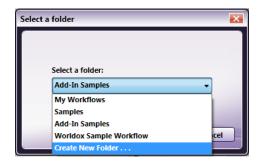
Note: You can copy a running workflow, but you cannot edit one. To edit, you must first stop the workflow.

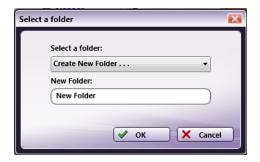
To copy/paste one or more workflows, do the following:

- Select the workflow(s) on the Workflow List (either from the same folder or different folders).
- Either click on the Copy Workflow icon from the tool bar or right-click on the workflow and choose Copy from the context menu that appears.

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- To paste the copied workflows into a specific folder, go to that folder and either click on the down arrow on the Folder name's title bar and
 choose Paste from the menu that appears or right-click anywhere in the Folder and choose Paste from the context menu that appears.
- To paste the workflow(s) using the tool bar, click on the **Paste Workflow** tool bar icon. The Select a Folder window will appear, as in the following illustration:





• On the Select a Folder window, choose the appropriate Folder from the drop-down list; then select the **OK** button.

Note: If you paste a workflow into a Folder that already contains a workflow with the same name, the pasted workflow will be renamed with the words "Copy." For example, "Sample Workflow - Copy."

• If you want to create a new folder, select the **Create New Folder...** option from the drop-down list. The Select a Folder window will expand to allow you to enter the name of a new folder in which to place the copied workflow; select the **OK** button when you are done.

Note: You cannot give the new folder a name that is already being used. Each folder name must be unique.

- When edited, the copied workflow will open in the **Workflow Builder** with the same attributes as the original, but the word **Copy** is added to the file and the workflow name.
- Make the changes you need on the workflow, and give it a new name. **Save** your *new* workflow. After you save it, the name will be replaced. Close the Workflow Builder to return to the main application screen to see the new workflow added to your list.

Delete Workflows

To delete one or more workflows, do one of the following:

- ullet Select the workflow(s); then ${f right-click}$ and choose the ${f Delete}$ option from the menu that appears, ${\it ord}$
- Select the workflow(s); then click the **Delete icon** on the tool bar.

You will receive a confirmation message, asking you if you'd like to delete.

Locking Workflows

For security purposes, you can password protect your workflow. If a password is assigned, a password is required in order to change its schedule, change its shared status, or edit, copy, delete, or export it. All workflows with passwords will be locked once the application launches.

To lock a workflow with a password, do the following:

- 1. Right-click on the workflow you are interested in from the Workflow List (or select multiple workflows using the Control key and right-click).
- 2. From the context menu that appears, choose the Password Protection > Set Password option.
- 3. The Set Password pop-up window will appear. On this window, enter and confirm a password for the workflow.
- Restart the application to lock the workflow with the specified password, or right-click on the workflow and choose the Password Protection >
 Lock Workflow option.

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5. Once a workflow is locked, a **lock symbol** will appear next to the workflow name in the Workflow List. See the following illustration for an example:



Changing Workflow Passwords

Once a password has been set for a workflow, you can change the password. Do the following:

- 1. Right-click on the workflow you are interested in from the Workflow List (or select multiple workflows using the Control key and right-click).
- 2. From the context menu that appears, choose the Password Protection > Change Password option.
- 3. On the Change Password pop-up window that appears, enter the old password and a new password; then re-enter the new password and select the **OK** button.

Removing Workflow Passwords

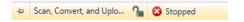
To remove the password protection from the workflow, do the following:

- 1. Right-click on the workflow you are interested in from the Workflow List (or select multiple workflows using the Control key and right-click).
- 2. From the context menu that appears, choose the Password Protection > Remove Password option.
- 3. On the Provide Password pop-up window that appears, enter the password; then select the **OK** button.

Unlocking Workflows

To unlock a workflow (but keep the password that was specified for it), do the following:

- 1. Right-click on the workflow you are interested in from the Workflow List (or select multiple workflows using the Control key and right-click).
- 2. From the context menu that appears, choose the **Password Protection > Unlock Workflow** option.
- 3. On the Provide Password pop-up window that appears, enter the password; then select the **OK** button. An open lock symbol will appear next to the workflow name in the Workflow List. See the following illustration for an example:



Sort Workflows

To sort workflows in a folder, click on the **down arrow** on the Folder's title bar; then choose the **Sort By** option from the menu that appears. You can choose to sort by workflow name (**Name**) or workflow status (**Status**).

Note: Any newly created workflows will not be automatically sorted based on previous sort conditions.

Reordering Workflows

To reorder the workflows, you can **drag-and-drop** the workflow name anywhere in the Workflow List (either in the same or different folder). In addition, you can use the **Shift** or **Move to** options (accessible by right-clicking on a workflow and choosing from the menu that appears).

- To shift the workflow in the folder, right-click on a workflow and then choose Shift (Top, Bottom, Up, Down) from the menu that appears. The Top option shifts the workflow to the top of the folder. The Bottom option shifts the workflow to the bottom of the folder. The Up and Down options shift the workflow up or down one level.
- To move the workflow within the Workflow List, right-click on a workflow and then choose Move To from the menu that appears. The Select a Folder window appears, allowing you to choose the appropriate folder location for your selected workflow(s). The Select a Folder allows you to create a new folder as well.

Note: When moving multiple workflows by dragging-dropping, you must keep the mouse and the Shift key pressed down at the same time while moving the mouse.

Viewing Activity Windows

To "float" the Activity panel for a selected workflow, select the workflow in the Workflow List. Then, right-click and choose the **Open Activity Window** option. The panel detaches from the workflow canvas. To "dock" a floating Activity panel back into the workflow canvas, click the **X** button on the Activity panel.

Note: If more than one workflow is selected when you choose this option, the activity window for the first workflow in the list that is selected will appear.

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Exporting

Using the options on the main application screen, you can export individual workflows, multiple workflows across different folders, or entire folders. Multiple workflows and entire folders are now saved in one file. Naming conventions are as follows:

- If exporting an entire folder, the default name of the exported file is the name of the folder.
- If exporting multiple workflows from more than one folder, the default name of the exported file is My Workflows.
- · If exporting a single workflow, the default name of the exported file is the name of the workflow.
- · The file extension for all exported files is .wfxp.

Note: If a shortcut is used to access a network directory in a workflow that is exported, the directory will not be accessible when the workflow is imported again. The full network path is required to access the appropriate directory upon import so make sure that your exported workflow does not contain any shortcuts to network directories.

Exporting Workflows and Folders

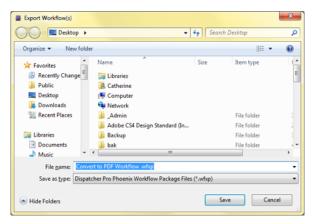
To export workflow(s), do the following:

- To export workflows, select the appropriate workflow(s) from the same or different Folders; then either right-click and choose **Export...** from the menu that appears, or click on the **Export Workflow** icon on the tool bar.
- To export the entire contents of a folder, click on the **down arrow** on a Folder's title bar; then choose the **Export Folder** option from the menu that appears. The Export Workflow(s) window will appear.
- To export all folders in the Workflow list, click on the **down arrow** on the Workflow List title bar; then choose the **Export All** option from the menu that appears.

The Export Workflow Passwords message will appear, on which you can choose to export any existing passwords with the workflow. The following nodes can have passwords associated with them: Email Out, FTP, MFP User Box, Input Folder, Output Folder, and Watermark. If your workflow contains one of these nodes, you may want to export the passwords with the workflow; with this option enabled, the workflow can run without any additional configuration after import. This message will appear every time you export a workflow unless you check the **Don't show this message again** box.



Once you enable the options that you are interested in and select the **Export** button on the Export Workflow Passwords message, the Export Workflow(s) window will appear, as in the following illustration:



On the Export Workflow(s) window, specify a name and location for the exported workflow(s); then select the **Save** button. Note that if you change the name of the exported file on this window, the workflow will revert back to its original name when it is imported back into the application.

Importing Workflows

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To import workflows back into the application, do one of the following:

- **Double-click on an exported file**. The Import Wizard will appear. If Dispatcher Phoenix is not running, the application will automatically launch.
- Choose the **Import Workflow** icon from the tool bar menu. The Import Workflow window will appear. On that window, find the exported file that you would like imported; then select the Open button. The Import Wizard will appear.

You can import both *.wfx and *.wfxp files. If you are importing workflows that contain Input Folder, Output Folder, MFP User Box, FTP, Email Out, and/or Watermark nodes, you may need to reconfigure their Network Credentials before running the imported workflow.

Using The Import Wizard

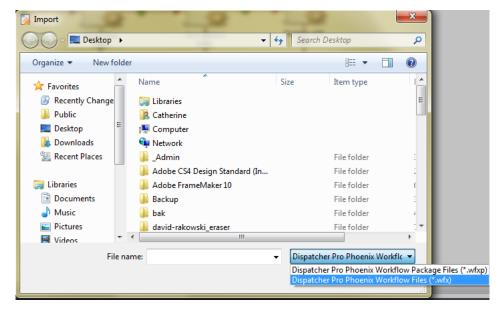
The Import Wizard resembles the following illustration:



To use the Import Wizard, do the following:

• Find the exported file that you want to import back into the application using the ellipsis button next to the **Select a file to import** field. On the Import window, you have the choice of importing two different file types: *.wfxp and *.wfx.

Note: If a *.wfxp file has been renamed to *.wfx, you will not be able to import it.



- Select a folder into which the workflow will be imported. Options are:
 - **Bring into same folder** This option creates a folder with the same name as the folder that the imported workflow was originally exported from (unless the folder already exists). If you are importing a *.wfx file, this option will be disabled.
 - **Copy into another folder** This option allows you to place the imported workflow in an existing folder chosen from the drop-down list. You can choose **Create New Folder...**to import the workflow(s) into a new folder. An empty field will appear in which you can enter the name of the new folder, as in the following illustration:

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Select the Import button when you are done. If an imported workflow already exists in the Folder that you are importing into, the workflow will be appended with "Copy" (similar to Windows naming conventions). If the file you have chosen has been corrupted or is not a
Dispatcher Phoenix file, you will receive an error message. See the Troubleshooting section for more information.

Note: The Import Wizard can be launched multiple times so that you can simultaneously import a number of files.

Preview Area

The Preview area displays the graphical representation of the workflow that is selected in the Workflow List. You can double-click in the Preview area to edit the workflow (opening the Workflow Builder).

Using the Preview Area Context Menu

To open up the Preview area's context menu, right-click on the Preview Area. The following context menu will appear with these options:

- Start/Resume Runs a workflow.
- Stop Stops the workflow.
- Pause Pauses the selected workflow.
- Schedule Sets the time when the workflow will run.
- Edit... Opens the workflow in the Workflow Builder for editing.
- Export... Exports the workflow as a *.wfxp file.
- Animation Speed Specify a speed for your workflow's animation.

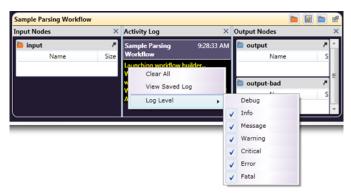
Activity Panes

The lower half of the window contains activity panes which display the Input Nodes, Activity Log, and Output Nodes for the selected workflow. You can scroll through the *Activity Panes* to review the *Input, Activity Log, and Output* for each workflow. You can also drag-and-drop files into and out of the folders in the Activity Pane, similar to using Windows Explorer.

Note: The folders in the Activity Pane can only display one thousand (1000) files. Should a folder have more files than can be displayed, when all files are attempted to be selected (as in the case of bulk deletion), only the first 1000 files will be affected. The process must be repeated for each 1000 files in the directory.

Using the Activity Panes Context Menu

To open up the context menu for use with Activity Panes, right-click on the Activity Pane.



The following context menu will appear with these options:

- Clear All Clears all logs from the Activity Pane.
- View Saved Logs Opens up saved logs in
- the Log Viewer.

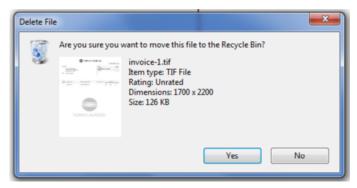
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• Log Level - Specifies what information is logged.

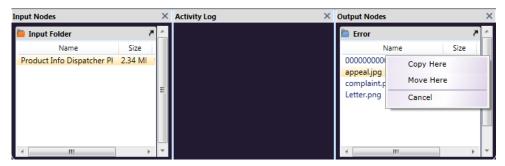
Using Files in the Activity Pane

Dispatcher Phoenix allows you to act upon files in your workflow Input and Output folders just as you can on a PC desktop.

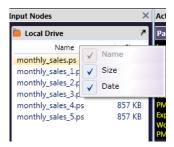
• Removing files - To delete one or more files, click on a file (or Ctrl-click to select multiple) in either folder type in the Activity Pane. Select **Delete** from the context menu. Upon confirmation, the files will be moved to the Recycle Bin. In the following illustration, right-clicking on a file in the Input folder and selecting *Delete* caused a prompt to confirm the action.



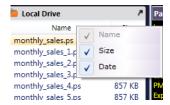
- Opening files To open a file, double-click on the file name.
- Drag-and-drop files You can drag-and-drop files directly into the Input and Output folders. You will be asked whether you'd like to copy or move the files, as in the following illustration:



• **Using context menus** - Right-click on the Input or Output folder to see the context menu and options. The resulting menu will depend on the type of node and where the node is clicked. The following example is the result of right-clicking on the **Input Folder header bar**:

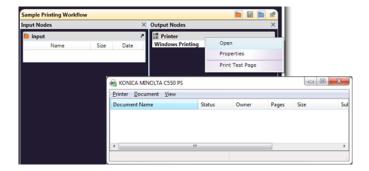


The next example is the result of right-clicking on the **Input Folder Name**:



This last example is of a Printer Output node. Double-click to open the **actual printer queue**, or right-click to get the context menu shown.

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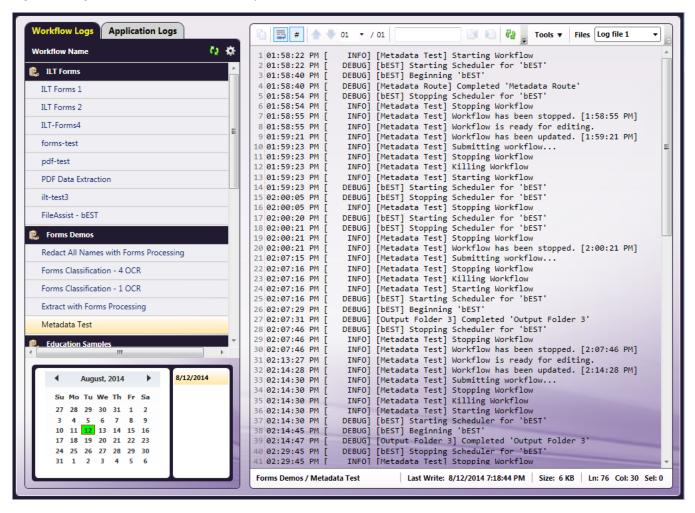


Log Viewer

Activity log files are recorded each day individually for each workflow. To access the Log Viewer, do one of the following:

- Right-click in the Activity Log section of a workflow that has been executed at least once; then select View Saved Log, or
- Select Log Viewer... from the Tools pull-down menu.
- Go to the Windows Start button > All Programs > Konica Minolta > Dispatcher Phoenix; then click on Dispatcher Phoenix Log
 Viewer

The Log Viewer will look similar to the following illustration, with the selected workflow highlighted. You can select the contents (partial or all) of the Log Viewer using the mouse and/or Shift and arrow keys.



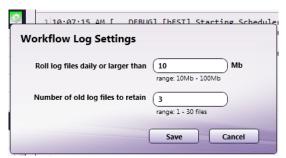
Workflow Logs

The **Workflow Logs** tab displays all workflows that have log files on disk (in other words, they must have run at least once). Click on a specific workflow to view its log files.

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Features of the Workflow Logs tab include:

- Folders All workflows are grouped in the same folders as in the Workflow List on the Dispatcher Phoenix main application.
- Refresh button To reload the workflows listed in this panel without restarting the Log Viewer, click on the Refresh button.
- Calendar You can easily navigate the log's history using the calendar at the bottom of the window. Clicking on the month name will bring up a 12-month year view, which can be scrolled one year at a time using the arrows. Clicking any month in the year view will bring up that month on the calendar. Months may be scrolled through one at a time using the arrows, as well.
- Workflow Log Settings The information displayed in the Log Viewer depends on the processes in the workflow and your Log Settings. Click on the Workflow Log Settings button on the Workflow Logs tab and a drop-down palette will appear, as in the following illustration:



Do the following:

- In the Roll log files daily or larger than field, enter a number at which the log file will be saved and the next log started from 10-100 MB in size
- In the Number of old log files to retain field, enter the number of log files that you would like to retain (up to 30 files).
- Select the Save button when you are done. Note that the Dispatcher Phoenix application must be running in order to save the log settings.

Each of these settings, while set in one location, apply to each workflow individually.

Note: New log files will be created for each workflow under two (2) conditions: the day/date changes or the log file size reaches the set maximum.

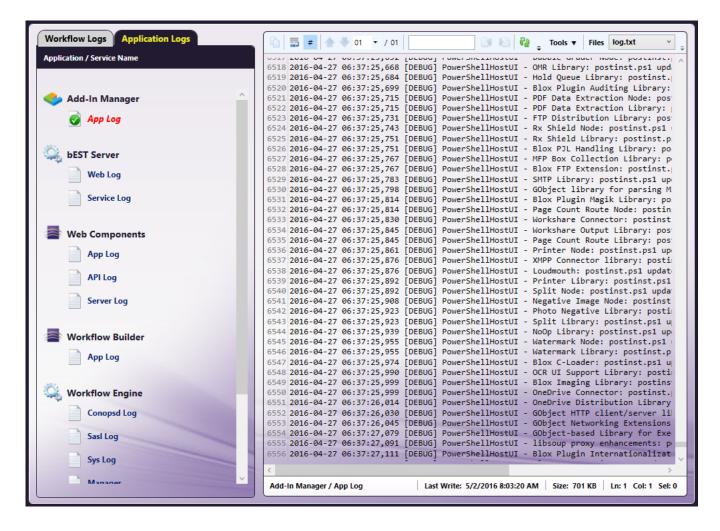
Application Logs

When you click on the Application Logs tab, you will be able to access logs from the following applications:

- Add-In Manager
- bEST Server
- · Web Components
- Workflow Builder
- Workflow Engine
- MFP Registration Tool

See the following illustration for an example:

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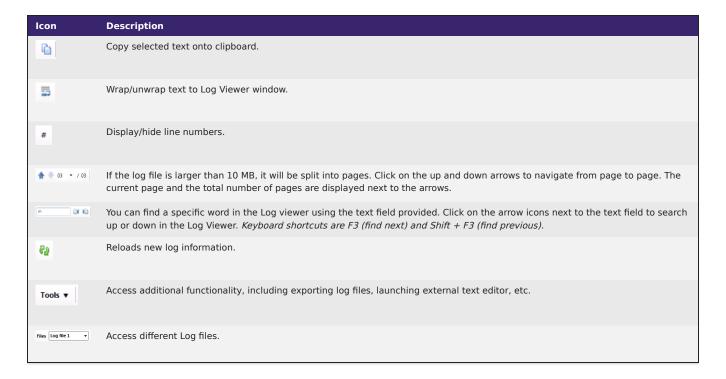


Tool Bar

The Log Viewer's tool bar resembles the following illustration:

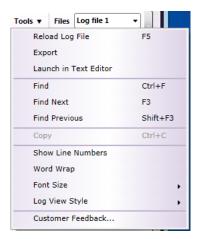


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Tools Button

When you click on the Tools button on the Log Viewer tool bar, the following drop-down menu will appear:



Choose the following:

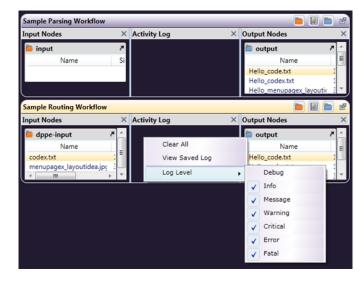
- Reload Log File To reload new log information.
- Export To export the log file in a text file.
- Launch in Text Editor To open the log file in a text editor.
- Find To focus on Search text field on tool bar.
- Find Next To search for the next occurrence of the Search text.
- Find Previous To search for the previous occurrence of the Search text.
- Copy To copy selected text onto clipboard.
- Show Line Numbers To hide/display line numbers.
- Word Wrap To wrap/unwrap text to Log Viewer window.
- Font Size To change the size of the log file's text. Options are: Default, Small, Medium, Large, Extra Large
- Log View Style To change the background style of the Log Viewer. Options are:

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- Default
- Notepad (Notepad background)
- · Console (Console background)
- Powershell (Powershell background)
- Customer Feedback To launch the Customer Feedback Agent.

Clear All and Log Level Options

You can right-click in the **Activity Log** area and **Clear All** logs. This clears logs from the **Activity Log** display. *It does not, however, erase any log files on the system.* To display the same log again, select the **View Saved Log** option from the panel menu.



Choose **Log Level** (from the context menu) to mark the information you want included in your log files. By default, all levels are selected for logging. All of the activity logs contain debug information in case of error, to help with troubleshooting, but you have the option to deselect any of the other types of messages logged for your workflows.

Features and Functions

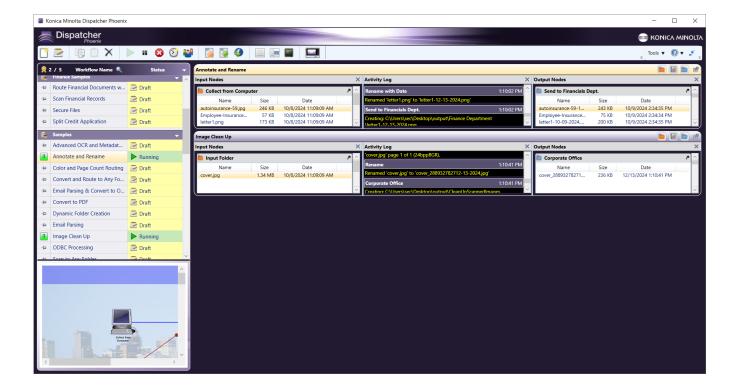
Dispatcher Phoenix will execute the workflows you create in its Workflow Builder. These workflows can also be edited or copied. The main screen includes the following features.

Workflow List

You can "pin" open a workflow to display the selected workflow in the lower left corner of the screen by clicking on the pushpin to the left of the workflow's name in the Workflow List.

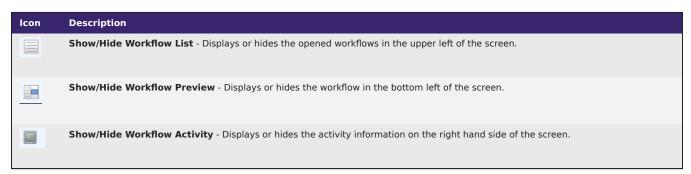
Note: When you pin a workflow, the workflow preview displayed in the lower left corner of the main application screen will appear as a static image; no LiveFlo animations will appear when the workflow is running.

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Show/Hide Views

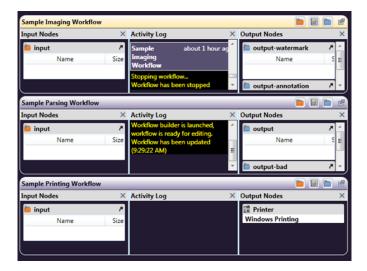
The next section of the menu bar has three icons that can be used to change the Workflow view.



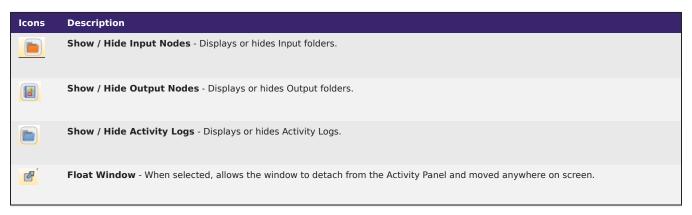
Workflow Activity Panel

On the top right hand side of each opened workflow's activity panel (under the Tools menu), four icons appear, allowing you to change the view of the selected workflow, as in the following illustration:

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Icons on these panels do the following:



You can also stretch the length or width of a column by clicking and dragging the column border lines.

Workflow Views

The layout you set up for Dispatcher Phoenix (views displayed, pane sizes or workflow(s) shown) will be saved automatically. This way, the next time you open the application, your desired look and layout is presented without the need to reset all the panes and views.

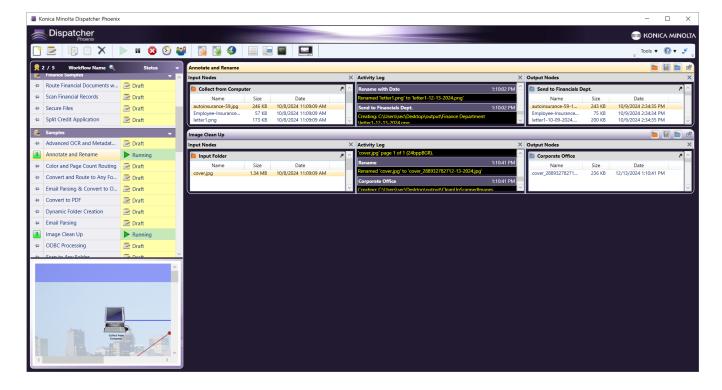
The one exception is the Activity Pane. Since this pane can be detatched, the size of the node and activity lists will always open at the default size. However, if this pane is hidden, it will remain hidden upon opening the application.

Workflows - Pinned/Unpinned

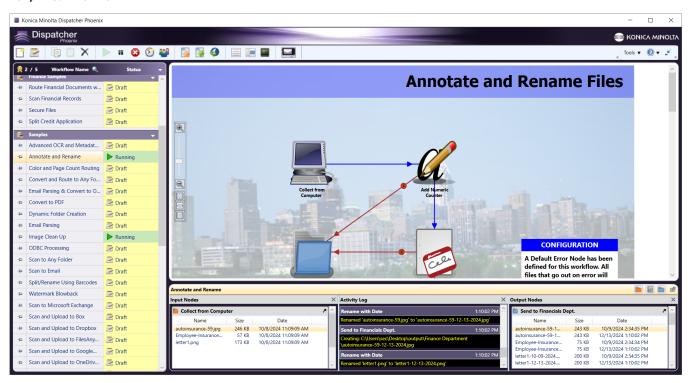
The Dispatcher Phoenix screen has two different views of a selected workflow, and other views for the Workflow List and Activity Pane.

"Pinned" Workflow

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"Unpinned" Workflow

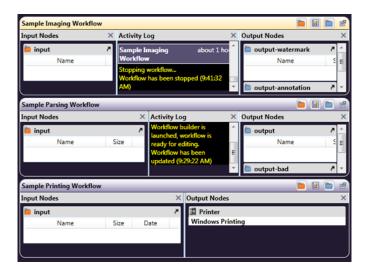


Both views have a tool bar for your viewing preferences, allowing you to Zoom In and Out, to Fit to Width, show the Whole Page, or display as Two Pages (for a large workflow which actually uses at least two pages).

Activity Pane Views

You can stretch the length or width of a column by dragging it to the desired size, or use the icons, at the top of each section, to hide one or two of the columns.

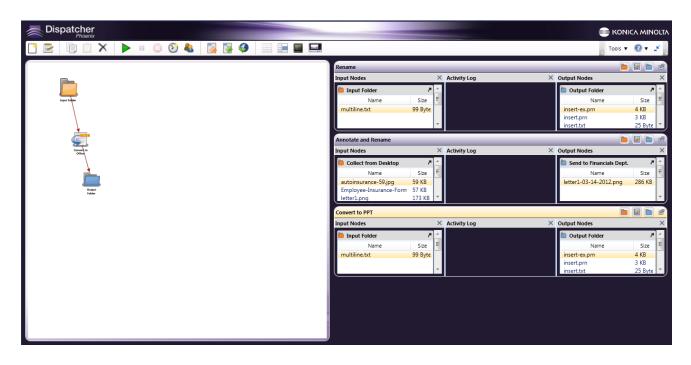
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Hiding The Workflow List, View, Or Activity

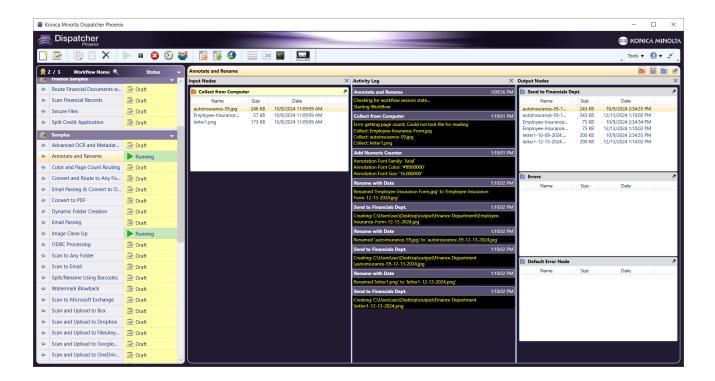
You can click on one of the workflow view icons to hide the Workflow List, View, or Activity.

1. Workflow List Hidden - The following illustration displays the screen with the Workflow List hidden:



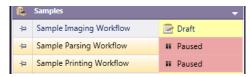
2. **Workflow Preview Hidden** - When you click on the second **Show/Hide Workflow** icon, the workflow's preview will be hidden, as in the following illustration:

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Working With Running Workflows

- To **stop** a running workflow, select it in the Workflow List, and click on the **Stop Sign** icon. If the workflow is currently processing files, a message will appear, requiring action on how to proceed.
- To temporarily **pause** a running workflow, highlight the workflow and click on the **Pause** icon. The workflow will stop running and the **Status** will change to **Paused**. To **Pause All** of the active workflows, use the **Pause running workflow(s)** option on the **Tools** menu.



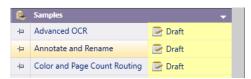
• To **close** the application when a workflow is running, click the **X** icon at the top right hand side of the main application screen. If the workflow is currently processing files, a message will appear, requiring action on how to proceed. If no messages appear, this means that files were not being processed at that time. In this case, the previously running workflow will be resumed when the application opens again, and files will not be recollected.

Running A Sample Workflow

The first time you launch Dispatcher Phoenix, there will be sample workflows for you to use to get acquainted with the application. Before they can be executed (initially they are "drafts"), they need to be opened in the Workflow Builder and validated.

Dispatcher Phoenix can only execute *valid* workflows in the Workflow List. To be valid, a workflow must have each node defined to match your Collection Points, Processes, and Distribution Points. The samples listed at first launch contain valid processes, but need specific Collection (Input) and Distribution (Output) points defined to actually run the workflow. The **Status** column will show whether or not a workflow is Running or Stopped. If you try to run an invalid workflow, you will get a failure message.

In this example, you will run the Annotate and Rename sample.

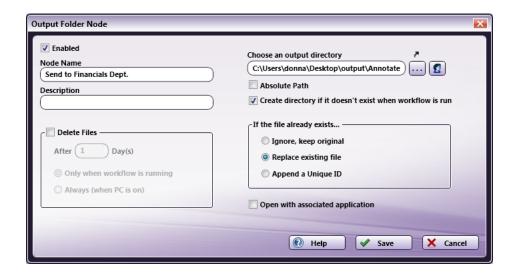


Do the following:

1. Double-click on the Annotate and Rename sample in the Workflow List to launch the Workflow Builder.

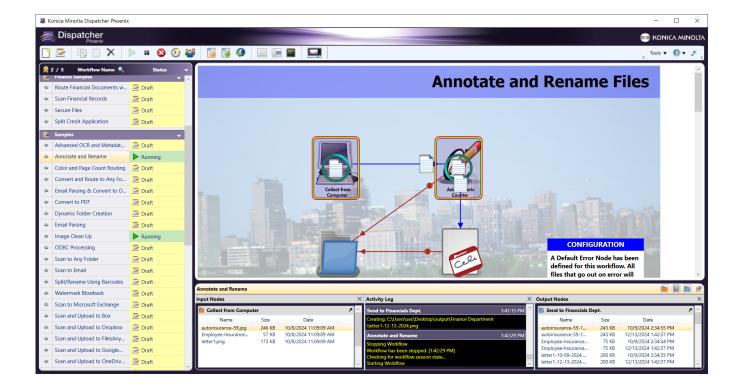
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- 2. Double-click on the Input Folder icon on the Workflow Builder's Canvas Area to open the Input Folder Node properties window.
- 3. On the Input Folder Node properties window, do the following:
 - a. Check the **Process files as a group** box to have Dispatcher Phoenix collect all files at one time, before processing any of them. If this box is left unchecked, each file will be processed individually.
 - b. Make sure the **Delete on Retrieve** box is unchecked so that the files in the folder won't be deleted after processing.
 - c. The Input Folder node's directory has already been defined for you. To change the directory, click on the **ellipsis** button to find another directory. In this case, make sure that you add your own image files to the new directory.
 - d. Select the *Save* button when you are done.
- 4. Double-click on the **Output Folder icon** on the Workflow Builder's Canvas Area to open the Output Folder Node properties window, as in the following illustration.



- 5. On the Output Folder Node window, do the following:
 - a. The Output Folder node's directory has already been defined for you. To change the directory, click on the **ellipsis** button to find another directory.
 - b. For this sample exercise, make sure that the Delete Files box is unchecked.
 - c. Select the **Save** button when you are done.
- 6. Double-click on the **Annotation** icon on the Workflow Builder's Canvas Area to change the defined annotation.
- 7. Double-click on the **Rename** icon on the Workflow Builder's Canvas Area to change the rename process.
- 8. Click on the **Validate** button on the tool bar to make sure the workflow is valid.
- 9. Click on the Save icon to save the workflow; then close the Workflow Builder by clicking on the X in the upper right corner of the screen.
- 10. Once the **Workflow Builder** has closed, you will be back at the main application screen, and the workflow will be highlighted. Click on the **Run** icon and you can watch your files run through the workflow, as in the following illustration:

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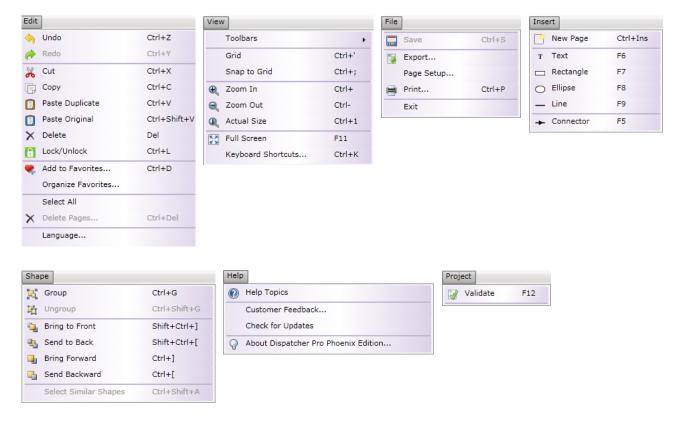


Using the Workflow Builder

This section identifies the many features and functions in the Workflow Builder.

Menus

The menus, listed by name across the top of the screen, include File, Edit, View, Insert, Shapes, Project and Help.



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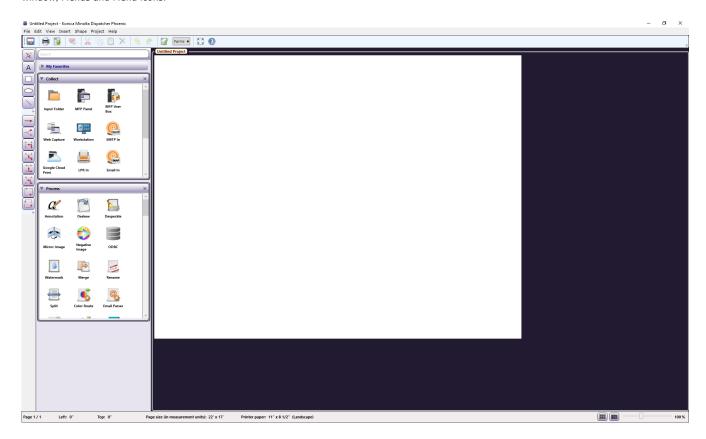
Menu Bar Icons

Just beneath the written menus, there are icons which perform some of the more commonly used functions, including: New, Open, Save, Save As..., Print, Export, Cut, Copy, Paste, Delete, Undo, Redo, Validate, Unlock Demo Options, Full Screen, and Help.



Additional Features

The following illustration points out more of the features of the Workflow Builder. The part of the screen where you drag-and-drop your objects is called the *canvas*, or canvas work area. On the left side of the screen are Drawing Tools and Connectors, Nodes Palettes, and, at the top of the window, Menus and Menu Icons.



Properties Panel (Visual Attributes)

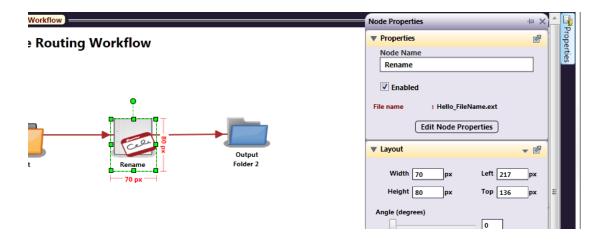
When the **Properties** panel is opened, it will only show the **Properties** specific to the object you have selected. The **Properties** panel allows you to define the visual traits of an object, such as size, color, font, and order. You can also disable nodes by unchecking the **Enabled** box.

Note: Double-clicking on a node opens its window only; it does not open the Properties panel for the node. To change the node definition, but not its visual properties, double-click on the node.

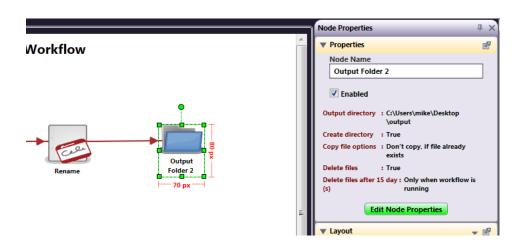
To open the Properties panel, do one of the following:

• Highlight an object and either mouse-over or single-click on the small Properties tab to open it.

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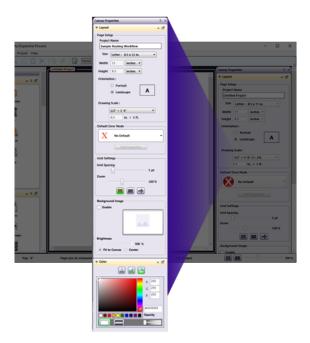


- Select an object and either right-click (for a context menu), or select **Properties** from the **Edit** pull-down menu (**Edit > Properties**).
- Select an object and press <F4>.



Work Area Properties

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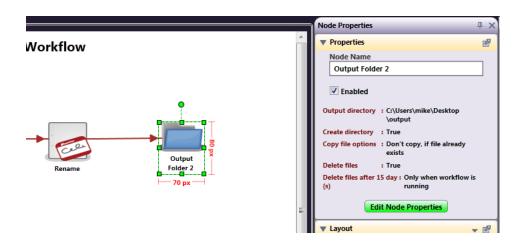
The Workflow Builder work area's properties include Page Setup, Default Error Node, Grid Settings, and Background Image under Layout and additional attributes under Color.

- Under **Page Setup**, the paper size drop-down menu has most of the commonly-used sizes, but you can use the Width and Height options to create a custom size. For page *Orientation*, mark the appropriate button.
- To specify a *Default Error Node*, choose the appropriate node from the drop-down list in the Default Error Node area. Then select the **Edit Properties** button.
- For *Grid Settings*, use the Grid Spacing slider to determine how far apart the grid lines are, and the Zoom slider to determine the view.

 Note: The three buttons in this section toggle the Grid, Snap to Grid, and Cross-hairs on/off.
- Right-clicking inside the properties panel sections allows you to **Set Layout or Color Defaults**. You can also set the defaults using the small menu icon (the little triangle).

If you set any properties as default, they will be used the next time you create or edit a workflow object for which the defaults are set.

The following illustration explains how to keep the *Properties* panel open, "pinned," or on Auto-Hide. The icon of an arrow coming out of a box allows the sections of the panel to "float" anywhere you want on the screen.



Default Error Nodes

Instead of drawing an error output node for every node in your workflow, you can define a default error node that will handle all error transitions. In this case, all failed documents will be forced into this default error node, which will not be visible from your workflow. You can specify any distribution node to act as the default error node, such as:

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- · An output folder
- An MFP device
- An SMTP server
- An FTP server

If you do not want to specify a default error node, make sure the **No Default** option is selected from the **Default Error Node** pull-down list (this is the default).

Workflow Button Icon

The Workflow Designer allows you to select an image to use as the workflow preview image at the MFP. You have the following options:

- Enable Clicking in this checkbox allows the workflow to display using a custom image. By default, the workflow displays the first page of the workflow.
- Select an Image This allows you to choose browse for an image from your computer or your clipboard.

To select an image, do the following:

- 1. Select the **Select an Image** button. This will open the Select an Image window.
- 2. Browse for an image.
- 3. You will be provided the opportunity to crop the image to your desired size.

Notes

- On the MFP, the workflow image displays workflow images at 250x250px. This can result in stretching, if the image is not cropped to a similar size.
- By default, Memory Optimization is enabled, which can aid in loading times at the MFP.
- 4. Click the **Select** button to save your choice and close the window.

After selecting an image, a small version of the image will display in this area.

Background Image

You can also choose to upload a picture to use as your background. In the following illustration, a photograph is used; however, you could use a floor plan, map, or any other image.

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To specify a background image, do the following:

- 1. Double-click on the canvas work area or open the Properties panel without any objects selected.
- 2. In the Background Image area, check the **Enable** box.
- 3. If the workflow has multiple pages, a dropdown menu will appear that allows you to specify which pages to apply the image to. Images can be applied to All Pages or an individual page.

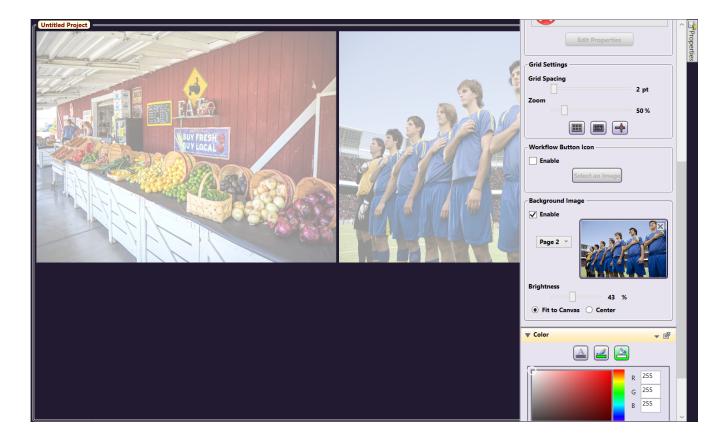
Notes:

- Background images are applied to the specified pages at the time of upload. It is recommended to make the page selection before
 uploading the image.
- If a workflow has multiple background images, selecting the "All pages" option will show a blank thumbnail.
- If every page in the workflow is using the same background image, then when a new page is inserted it will automatically use that background image as well, otherwise the page will be inserted without a background image.
- 4. Select the Image button to specify begin browsing for an image (with file types: PNG, JPG, GIF or BMP).
- 5. Select the **Open** button to upload it.
- 6. Use the **Brightness** slider bar to change the brightness of the image.
- 7. Define whether the picture should be fit to the canvas or centered on the canvas using the appropriate radio buttons (Fit to Canvas and Center).

Notes:

- If the image is large, it will shrink to fit on the canvas, even with Center selected. If the uploaded image is small, such as an icon-sized image (45 x 45 pixels), choosing Fit to Canvas may distort the image as it is made larger to fit.
- The Brightness, Fit to Canvas, and Center options affect the entire workflow, not individual selected images.

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Background images can be removed by selecting the \boldsymbol{X} button on the background image thumbnail.

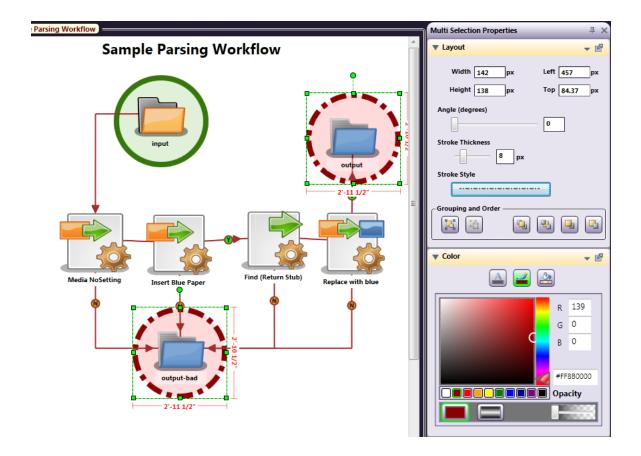
Layout

On the Layout section of the Properties panel, you can do the following:

- Adjust the Width and Height of an object using the Width and Height fields.
- Specify the object's distance from the left or top of the drawing using the **Left** and **Top** fields.
- Specify an angle for the object's placement on the canvas using the ${\bf Angle}$ slider.
- Modify the thickness of the object's stroke using either the **Stroke Thickness** slider or specifying a value in pixels in the field next to the slider. You can change multiple objects, of the same type, at the same time.
- Specify the object's border line style using the **Stroke Style** box (solid, dashed, or dot and dash combinations).
- Specify the grouping and order of the object using the icons under **Grouping and Order**.

The illustration below shows two circles selected and their stroke style and thickness changed. If multiple nodes were selected, you could even change their icons simultaneously!

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Default Settings

The changes you make to the page layout, error node, grid and background image can be set as the default configuration. This way, each time you open the application, your preferences will already be set.

Set Defaults

To set your preferences as default settings, right-click anywhere on the **Properties** panel; choose **Set as Default** from the context menu. Then, select either **Page Settings**, **Error Node**, **Grid Settings** or **Background Image Settings**. Once selected, any settings made for that section will be saved as the default configuration and will appear each time you create a new workflow.

Restore Defaults

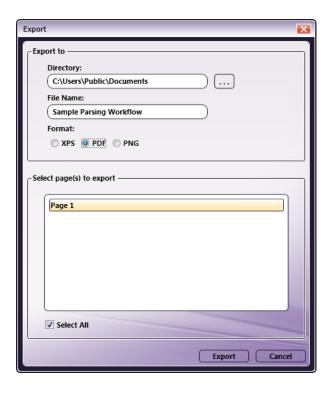
If you make changes to the layout, grid or background settings but wish to return to your default configuration, you can restore these settings. To restore your preferences to the default settings, right-click anywhere on the **Properties** panel; choose **Restore Default** from the context menu. Then, select either **Page Settings**, **Error Node**, **Grid Settings** or **Background Image Settings**. Once selected, any settings made for that section will be reverted to the default configuration.

File Menu

The File menu in the Workflow Builder includes Save, Export, Page Setup, Print and Exit.

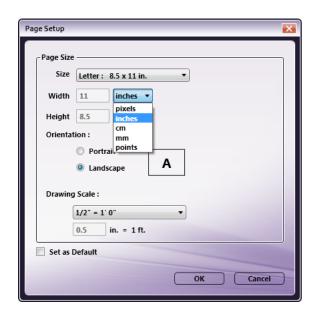
- Select **Save** to put the workflow in a proprietary location.
- Select **Export...** to export your workflow file as a XPS, PDF, or PNG file type in the location of your choice. The Export window will open, as in the following illustration:

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On the Export window, do the following:

- 1. In the File Name field, enter a ${\bf File\ Name}$ for your exported file.
- 2. Choose the **Format** you want using the appropriate radio buttons (XPS, PDF, PNG).
- 3. Select the **Export** button to save the exported file.
- Select **Page Setup...** to edit or set defaults for the workflow page. (See the following illustration).
- 1. Choose **Paper Size**, and measurement units: Inches, Pixels, Centimeters, Millimeters, or Points.
- 2. If **Inches** is selected, set the desired **Drawing Scale**.
- 3. Check the **Set as Default** box to save the Page Setup options.



• Select Print... to print the workflow.

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• Select **Exit** to close the application.

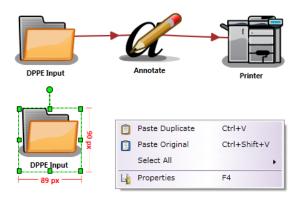
Edit Menu

The Edit menu includes many editing functions that are typical of Windows applications, including: *Undo, Redo, Cut, Copy, Paste, Delete, and Select All,*** and do exactly as expected to a selected object. These functions are also available via the context menu by right-clicking on an object. Other options on the Edit menu are:

- Select **Undo** to reverse the last action you performed. If, for example, you deleted a node by accident and need to get it back, you could use Undo.
- Select Redo (not enabled until you use the Undo function) to repeat the action that had been previously "undone."

Undo and Redo can be used on the following actions:

- Adding or deleting workflow elements (nodes, connectors, drawing objects)
- · Moving or resizing a workflow object
- · Cutting, copying and pasting workflow elements
- o Changing properties (color, font size, stroke)
- Select Cut to remove the selected element.
- Select Copy to copy the element to the clipboard.
- Select **Paste Duplicate** (only available if you copy a Node such as the Input or Output folder) to create an independent copy of the node with the same properties as the originally copied node. If you make changes to the duplicate copy, those changes will not affect the original, copied node.
- Select **Paste Original** (only available if you copy a Node such as the Input or Output folder) to create a pasted version of the same node. If changes are made to the pasted node, they will also be applied to the original node. In the following illustration, the Input Folder node was copied to the clipboard and has the following context menu options:

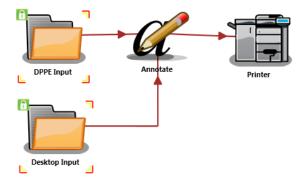


If you are copying any other element, such as rectangles, text boxes, circles, etc., or copying a mixture of nodes and objects, only the "Paste Duplicate" option will be available.

• Select **Lock/Unlock** to lock an object(s) to the canvas. When an object has been locked, a small lock icon will become visible in the upper left corner of the object when the node is highlighted. This is positional only for use with nodes and drawing objects; it has no effect on the attributes of the node.

Warning: Even if a node is locked, it can still be deleted! The "locking" is only positional with regard to the work area.

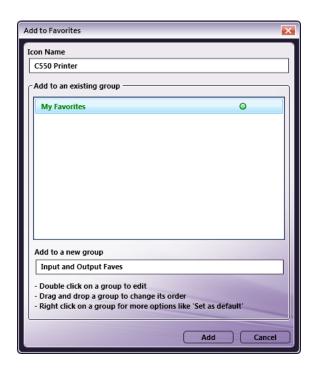
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- Select **Add to Favorites** to create your own custom nodes palettes for use with your workflows. To add a defined node to a "favorites" group, select the node; then do one of the following:
 - Select Add to Favorites... from the Edit menu. Or,
 - Right-click on the node and then select **Add to Favorites** from the context menu that appears. *Or*,
 - Click on the **heart icon** above an existing node (in a node palette).

Note: You can also save Grouped nodes as a Favorite.

The first time you add a favorite, you need to either add it to the default My Favorites group, or specify a new group to add it to, as in the following illustration:

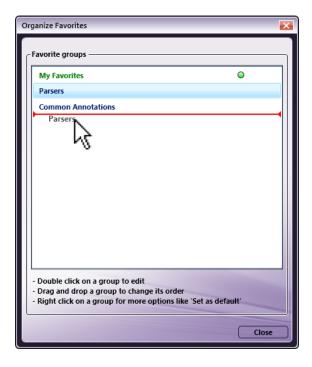


To remove a node from a Favorites group, click on the **heart x** icon in the upper left corner of a node in the group.

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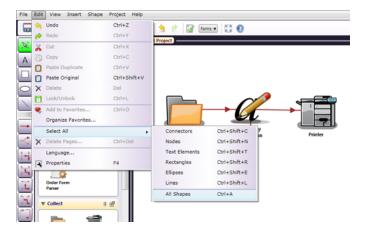


- To organize the nodes palettes if you have created more favorites groups, select **Organize Favorites...**. In the Organize Favorites window, you can do the following:
 - Drag the palettes in the order that you prefer, as in the following illustration:

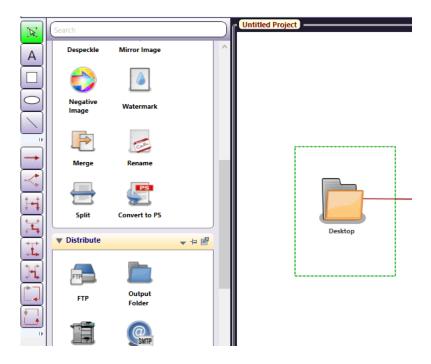


- Specify a default Favorites Group. Right-click on the group title; then choose Set as Default from the context menu.
- Rename a default Favorites Group. Right-click on the group title; then choose Rename from the context menu.
- Delete a default Favorites Group. Right-click on the group title; then choose Delete from the context menu.
- \bullet To select all similar shapes or all shapes at the same time, select **Select All** or press Ctrl + A.

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You can drag around the objects to be selected using the Select/Resize tool. To do this, choose the Select/Resize tool, click on the canvas above the objects, then hold down the mouse button and drag the mouse pointer around the multiple objects. Once selected, they can all be cut, copied, pasted, deleted or moved as a group. See the following illustration:



Language Manager

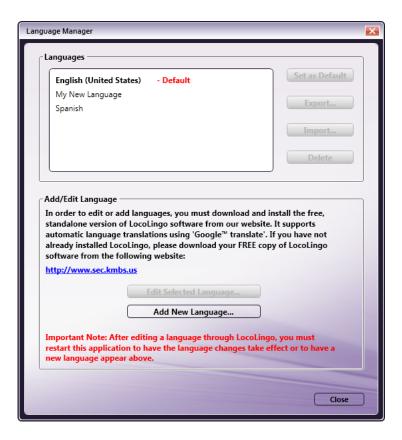
Note: Before you can use the Language Manager, you must have Konica Minolta's LocoLingo 3.0 application installed. This is provided for free on the SEC Website (http://sec.kmbs.us).

To open the Language Manager with LocoLingo installed, launch Dispatcher Phoenix and do one of the following:

- On the main screen, select **Language...** from the **Tools** pull-down menu.
- In the Workflow Builder, select ${\bf Language...}$ from the ${\bf Edit}$ pull-down menu.

The Language Manager's first screen lists any existing languages (English is the default) and allows you to **Edit** or **Add New Languages**. The initial screen, as in the following illustration, displays the **Edit Selected Language...** button grayed-out because you haven't yet selected a language for editing:

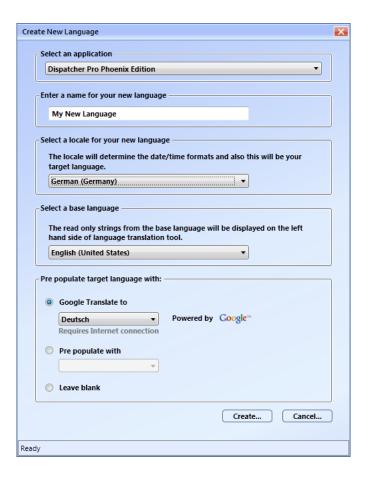
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Adding a New Language

To create a new language, select the **Add New Language** button on the Language Manager screen. The Create New Language window will open, as in the following illustration:

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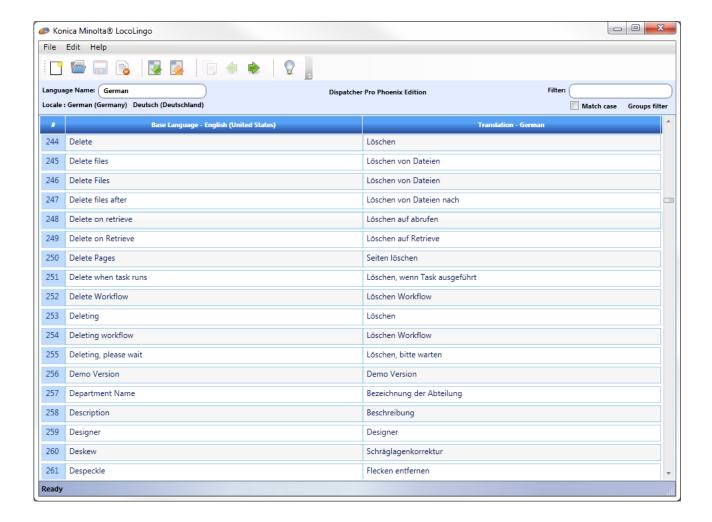


On this window, do the following:

- 1. In the Enter a name for your new language field, type in an appropriate name for the new language.
- 2. In the **Select a locale for your new language** drop-down box, select a geographical location. Locations are listed in both *English* and the *actual language*. You can only use one location per language, so you cannot create a new language using "English (United States)," because it is already used for the *default* language.
- 3. In the **Select a base** language drop-down box, select the base language with which to list the words and phrases to be translated. The base language that you choose will be used to list the words and phrases in the left column of the editing screen.
- 4. To pre-populate the translations using the Google Translate tool, select the **Google Translate to** radio button; then select the appropriate language in the drop-down box. The words and phrases will be translated for you, and a progress bar will display at the bottom of the screen. Note that some words or phrases, such as user-entered node names or technical phrases (ex: pixel or SMTP) will not be translated via this method; however, you can edit these phrases manually in the Language Manager.
- 5. To pre-populate the translations with language already available in the application, select the **Pre populate with** radio button; then choose the appropriate language in the drop-down box. If you choose this option, the window will open for you to enter the translations.
- 6. To enter all of your own translations, select the *Leave blank* radio button.
- 7. Select the *Create...* button when you are done.

Once translated, the Language Translation window will open with the base language on the left and the translations on the right side of the page, as in the following illustration:

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If you choose to pre-populate the translation fields, the window will open for you to enter the translations.

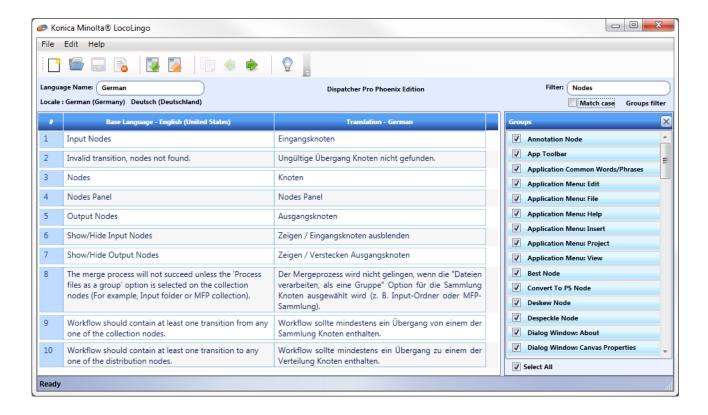
Filtering

Since there are so many words/phrases to translate, there are various filters you can use to narrow down the list.

- To narrow the list by group, click on the **Groups filter** button to select which phrases to show based on application function.
- To limit the words/phrases to a specific text string, use the **Filter** field. It will filter by the word(s) as you type. You can also specify whether or not to match the word/phrases by case by selecting the **Match case** checkbox.

In the illustration below, only words and phrases in the application that contain the word "Nodes" are displayed:

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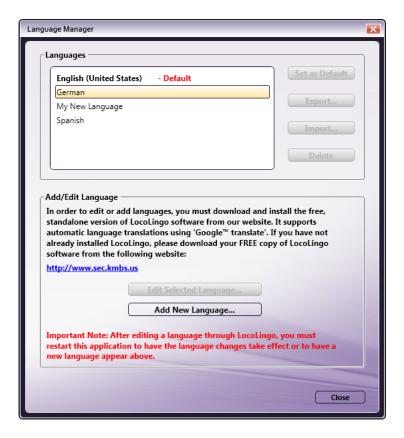
Applying Language Changes

To have the language changes take effect, close the Language Translation window and exit the Dispatcher Phoenix application completely.

If you were in the Workflow Builder, you must exit both the Workflow Builder and Dispatcher Phoenix in order for the changes to be put into effect.

In the following illustration, the new language has been added:

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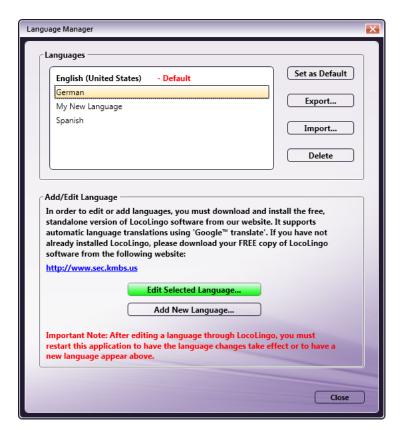


The Language Manager includes an automatic spell check function which uses the dictionaries from Microsoft Word. If you have MS Word installed on your PC, the Spell Checker will be automatically enabled for the following languages: English, French, German, and Spanish.

Editing an Existing Language

- $1. \ \, \text{To edit an existing language, select } \textbf{Language...} \ \, \text{from the } \textbf{Edit} \ \, \text{drop-down menu in the main application screen}.$
- 2. On the Language Manager window, choose the language that you want to edit; then select the **Edit Selected Language...** button, as in the following illustration:

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The Language Translation window will appear, with the words and phrases on the left and translated words and phrases on the right. If you select a word or phrase on the left, the same entry is selected on the right.

- 3. To enter or change the translation word/phrase that you want to use, type over the word on the right.
- 4. After you have edited at least one phrase, save your changes by clicking the **Save** icon (), as in the following illustration:



To have your changes take effect, restart the Dispatcher Phoenix application.

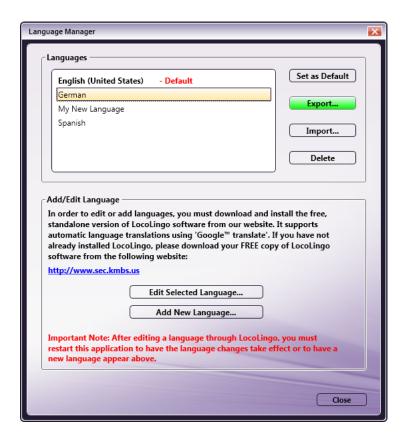
Important! After editing a language through LocoLingo, you must restart this application to have the language changes take effect or to have a new language appear in the list shown above.

Exporting/Importing Language

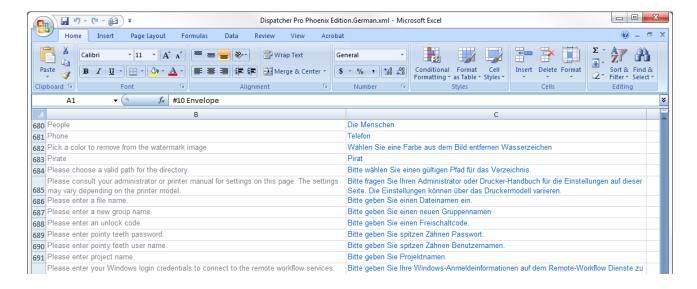
The *Language Manager* allows you to import or export a language. Exporting a language file allows you to navigate to, and open the language file in an *Excel* spreadsheet, or as a LocoLingo file, so you can perform the translations at your own pace.

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1. To export a language from the Language Manager window, choose a language and select the Export... button, as in the following illustration:

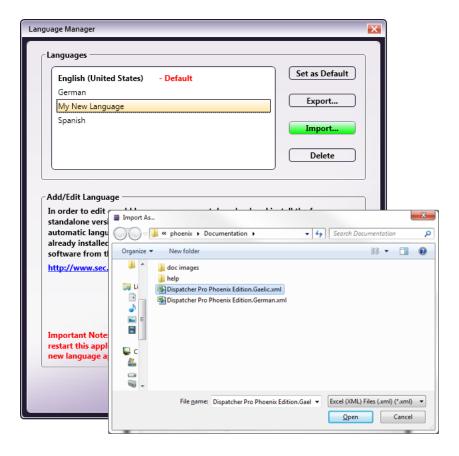


A message will display if your language file has been exported successfully. The following illustration shows an example of a language file successfully exported to, and opened in, an Excel spreadsheet:



2. When you finish translating all of the words and phrases in your exported file, open your application, and go to the Language Manager. Choose the language to be overwritten, and select the **Import**... button. The **Import As...** window will appear, as in the following illustration:

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3. On the Import As... window, choose the replacement language file; then select the *Open* button.

If it is desired to keep the current default language intact after importing an additional language, it will be necessary to create a new language to serve as the base language for the import.

Follow the steps detailed above to add a new language. The *Leave Blank* option may be selected to save time, since this language will be overwritten upon import. As described above, highlight the new language and click Import to select the new language file.

Once imported, this new language can be set as the default while leaving the original default language intact. Restart the application for the new language to take effect.

Note: If you import an incomplete translation file, the application will show asterisks for words and phrases that have not yet been translated.

As shown in the example above, select the language file to be imported, and select the *Open* button. A message will display if the file has been successfully imported.

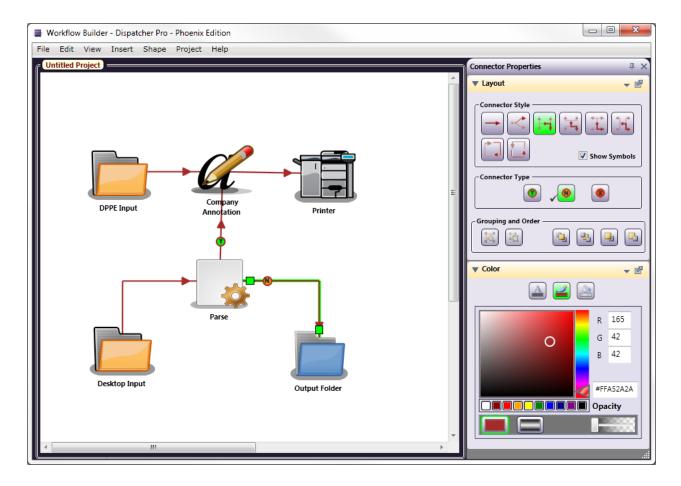
You can also Import a language file completed by someone else, if it is for the same application.

View Menu

• Select **Toolbars** to display or hide toolbars (the icons at the top of the canvas area), drawing tools, node panel, properties panel, and status bar.

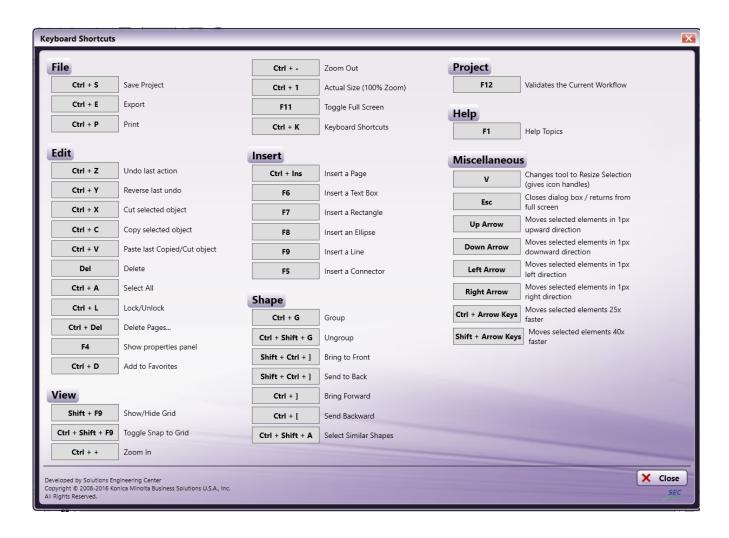
Hiding toolbars will give you more room to draw (the Insert menu can be used to create the drawing objects without using the drawing tool box). In the following illustration, no toolbars are displayed:

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- Select **Grid** to display or hide the grid. This function can also be performed using the Grid icon at the bottom of the screen (
- Select **Snap to Grid** to pull objects to the nearest grid line or not. This function can also be performed using the Snap to Grid icon at the bottom of the screen (
- Select **Zoom In** to magnify the view of the canvas (bring you closer to the canvas).
- Select **Zoom Out** to reduce the view of the canvas (take you farther from the canvas).
- Select Full Screen to have the Workflow Builder screen take up your entire monitor. Press F11 or the Esc key to return to the previous view.
- Select **Keyboard Shortcuts...** to open a window that lists the available keyboard shortcuts, as in the following illustration:

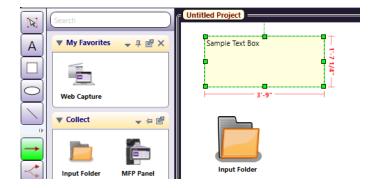
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Insert Menu

The *Insert* menu enables you to add a new page or a drawing object. You can use this menu at any time, but it is especially helpful when you are working in the application with the *Toolbars* hidden.

- Select New Page to add a new page to a Workflow Builder workflow project.
- Select **Text** to add a note, title, or any text in the canvas workflow area, as in the following illustration:



- 1. Select **Rectangle** to draw a rectangle or square around nodes (to visually group them). Rectangles and nodes can even be rotated using the small circle above the object.
- 2. Select **Ellipse** to draw an oval or circle around nodes.
- 3. Select **Line** to draw a line of the canvas.

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4. Select Connector to connect two nodes. Like a drawing object, the connectors can be different colors; however, unlike a drawing object, connectors can have more details assigned to them. Use the Layout section to show or hide symbols (arrows), to indicate an error, or even a Yes or No decision.

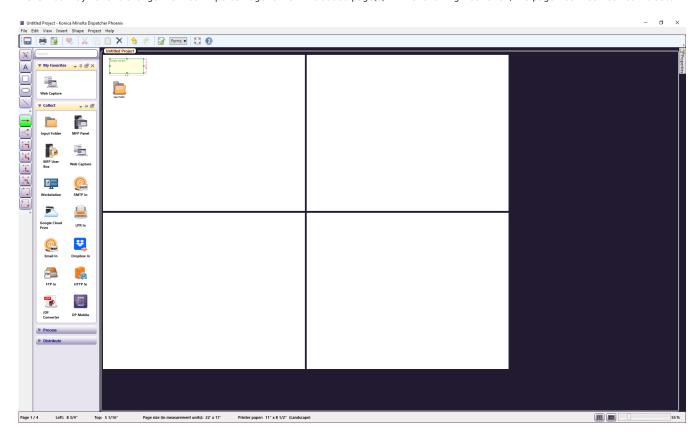
Notes:

- With the exception of Lines and Connectors, all drawing objects and icons work with snap-to-grid function to help you line up the objects in your workflow.
- All rectangles, ellipses, lines and text boxes can take advantage of the line styles, stroke thickness, opacity and colors under Properties.

Insert Multiple Pages

If your workflow turns out to be larger than you thought, use the **Insert** menu to add pages. To add a page, or pages, to an existing workflow, select **New Page** from the **Insert** pull-down menu.

Note: You may have to change the "zoom" percentage to view the added page(s). In the following illustration, the page was "zoomed" out to 55%:



Connecting Elements Over Multiple Pages

Multiple elements of a workflow can be copied and pasted from page to page. When you copy a node, **special paste options** become available: **Paste Original** and **Paste Duplicate**. Copying a node on one page and using **Paste Original** to paste it on another page is the equivalent of using a connector between two nodes on the same page.

Shape Menu

The Shape menu allows you to arrange the shapes drawn on the canvas.

- Select **Group** to group one or more shapes together.
- Select **Ungroup** to ungroup the grouped shapes.
- Select **Bring to Front** to place object(s) in front of other objects.
- Select Send to Back to place object(s) behind other objects.
- Select **Bring Forward** to place an object in front of other objects one level.
- Select **Send Backward** to place an object behind other objects one level.

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• To select similar shapes (ex: all rectangles or all circles), select one of the shapes on the canvas work area; then select **Select Similar Shapes**. This allows you to make the same changes to all of the shapes at once.

These menu options are also available in the Properties panel in the Layout section.

Project Menu

Select Validate to check that your workflow is logical and has followed all the rules of the application.

Help Menu

- Select **Help Topics** to access online help.
- Select Customer Feedback... to send us comments about the application or if you have experienced an error. The Konica Minolta Quality Feedback Agent window will appear.
- Select Check for Updates to check whether or not there are updates available.
- Select **About Dispatcher Phoenix...** to view information about your copy of the application.

Drawing Tools

The Tools and Connectors for drawing your workflow are described in this and subsequent sections.

Tools

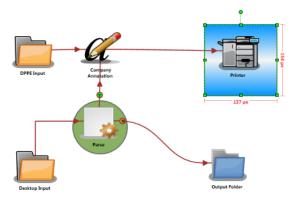
- Select/Resize. Use this tool to select objects on the canvas, and resize them by dragging the Handles to the desired size.
- Text Box. Inserts text on the canvas screen which you can use to add details to the flow.
- Rectangle. Draws a rectangle (or square) shape on the canvas work area.
- Circles/Ellipses. Allows you to add circles or ovals to your drawing.
- Line. Adds lines, of many styles and sizes, to the drawing.

Connectors

- Single. Connects objects with a straight line.
- Bezier Curve. Connects with a curved line.
- Right Left Up Down. Connector goes right or left then up or down with a right angle.
- Up Down Right Left. Connector goes up or down and then right or left with a right angle.
- Down Up 90 degrees Left Right. Goes down/up, left/right with another 90 degree angle.
- Left Right 90 degrees Down Up. Goes left/right, up/down with another 90 degree angle.
- Right Angles Connect Sides. Right angle lines connect to the Sides of the objects.
- Right angles connect Top or Bottom Right angled line connects to the top or bottom.

An example using several drawing tools follows:

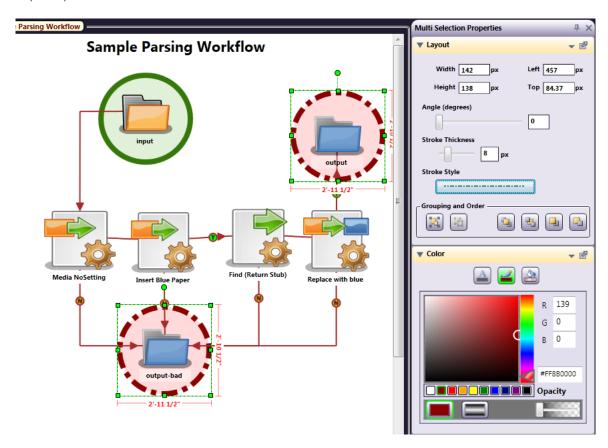
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Select and Resize

The *Select/Resize* tool is an arrow (with handles at each corner) used to select, resize, or move objects in the canvas work area. Click on the Select/Resize tool, click on a node to highlight it, and move it or drag the handles to make it larger or smaller.

Note: The Resize option, if used on a Group, resizes all of the objects in the group simultaneously. Font size is changed in the Text section of the Properties panel.

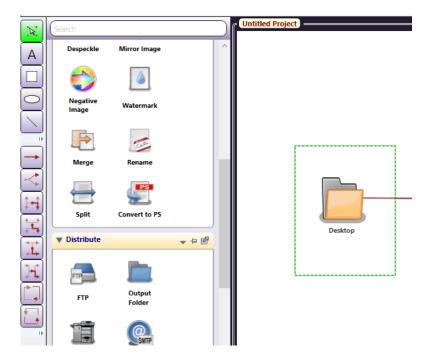


Multiple Select

There is more than one way to select multiple objects on the canvas:

- Click on the first object, hold down the **<Ctrl>** key, and click on the other objects to be selected, or
- Use the **Select/Resize** tool to click and drag around several objects at one time, selecting all of them, including the connectors, as show in the following illustration:

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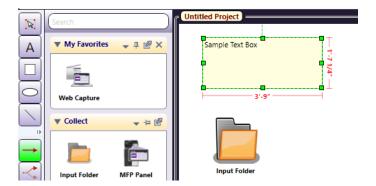


Hint: You can use the Edit > Select All, or the Shape menu, to select similar objects. Use <Ctrl> + A to select ALL objects on the canvas.

Text Box Drawing Tool

Workflows can have text boxes added to help explain the different details of the flow. Do the following:

- 1. Click on the **Text** tool, click on the canvas, and then drag the mouse to draw a text box. Do not worry too much about the size of the text box, as you can adjust it later.
- 2. Double-click on the text box and type the words you want included with the drawing. The text will wrap to the width of the box drawn.

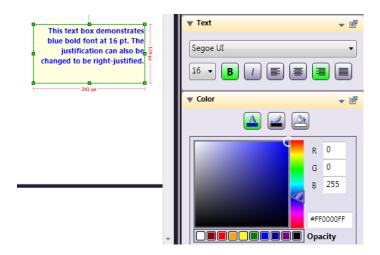


On the Properties panel, you can do the following:

- Use the **Text** section of the Properties panel to adjust the text to the size and style you want. You can change the size, make the text **Bold** or *Italic*, and set the alignment.
- $\circ~$ Use the Layout section to change the stroke thickness and style.
- $\circ~$ Use the different buttons to change the $\textbf{\textit{justification}}$ of the text.
- Use the **Grouping** and **Order** section to put the text box in the Front or Back.
- Use the **Color** section to change the text foreground, text background and text border.

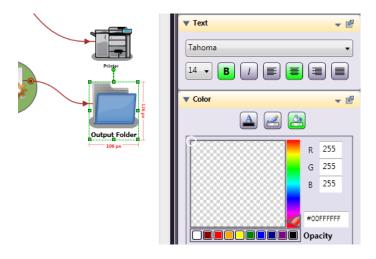
In the following illustration, the text box has been changed to **Bold**, 16 pt, with right alignment:

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To delete a text box or any object on the workflow, highlight the text box; then click on the **Delete** icon () on the menu bar, use the Delete key, or right-click and use the **Delete** option on the context menu.

The default font for a Text Box is the Windows default for your PC, but you can change this, by way of a drop-down list of fonts, as in the following illustration:



Note: An in-line spell check feature is included. If a word in either a text box or node label is misspelled, it will be underlined in red. Right-click on the word for a list of possible replacement words to correct the spelling.

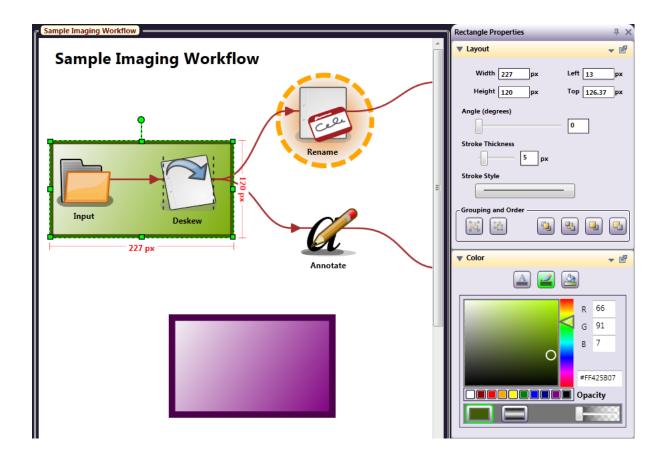
Rectangles and Circles

Circles and rectangles can visually associate multiple nodes, and colors can be used to represent areas of responsibility.

Follow the steps below to draw some objects using the tools on the left side of the screen.

- Click on the Rectangle or Ellipse drawing tool to select it; then click and drag to draw an object. With the object selected, click on the Properties panel (or press <F4>), go to the Color section and click on the "Fill Color" indicator.
- Within the Color section, click on the arrow slider and move it upward until the color indicator is in the desired range. Click inside the color indicator box and use the mouse pointer to move the color "picker" around until you find a shade that you like, and then let go of the mouse button.
- Use the Layout section to change the Stroke Thickness and Style for the Border of a drawing object. The stroke, or object border, can be solid, dashed, or dashed and dotted. You can also right-click or use the small menu to set Layout defaults.
- Use the Grouping and Order section to Bring objects to the Front, Send them to the Back, or somewhere in-between. Group objects for resizing, or just to have them stay together.

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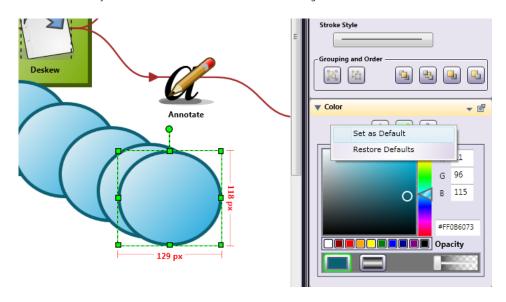


Note: Although nodes can be grouped, the connectors will not be part of that grouping.

Set Color Defaults

You can set color defaults for objects drawn on the canvas, and for the canvas area background and grid lines. To define colors for a rectangle, for example, highlight a rectangle, make its background and border the color you want, then right-click in the color section and choose Set as Default.

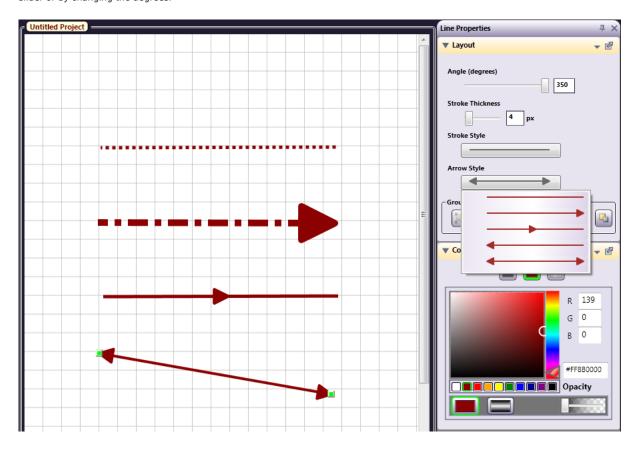
Note: Another way to set the default is to click on the small triangle in the section header to access the menu.



Lines and Arrows

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Line Properties, besides Stroke Thickness and Style, also include Color and Opacity. The thickness of the stroke can be changed using either the slider bar or by entering a numerical width, in pixels. Different styles of dotted lines can also be selected from a drop-down in the **Layout** section of the **Properties** panel. Arrows can be added to lines, at either end, at both ends, or in the center. **Lines** can also be assigned a specific angle using the slider or by changing the degrees.

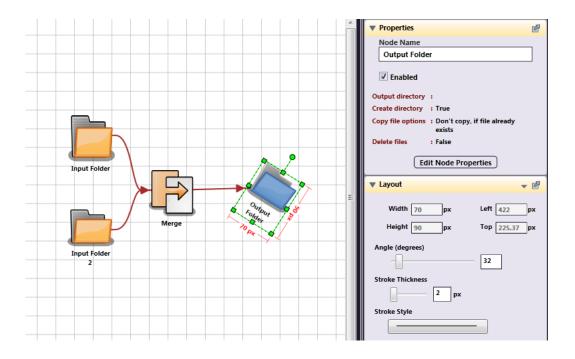


Note: Line angles cannot be set if changing the degree of angle would put the line off the canvas (i.e., the line is too close to the edge).

Rotate Shapes

Nodes and other objects drawn on the canvas can be rotated, using the mouse to move the circle above the center of the selected object, as in the following illustration:

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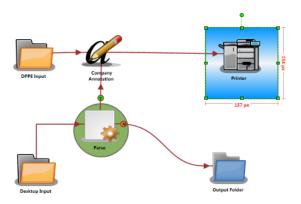


Connectors

Connectors are more than lines with arrows because they actually connect the nodes. After creating nodes, click on the desired connector, click on the originating node, and drag the connector to the next node, creating a *transition* between them.

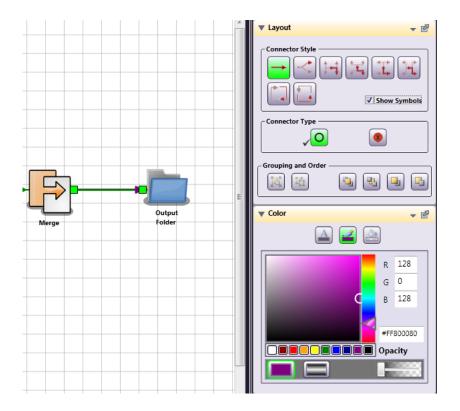
The Connector types are as follows:

- Straight Connector
- Bezier Curve
- · Horizontal bend to Vertical
- · Vertical bend to Horizontal
- Horizontal with additional 90 degree angle, continuing in a Horizontal direction
- Vertical with additional 90 degree angle, continuing in a Vertical direction
- Angled connector which snaps to the Sides of objects
- Angled connector which snaps to the Top or Bottom of an object

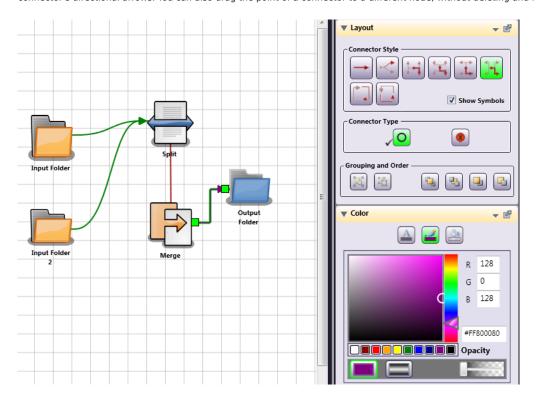


Although Connectors represent transitions from one node to another, they are visually like other drawing tools, in that they can be of different colors, opacity and gradient. Use the slider bar to find the Color "family" you want, and then the color picker to determine the exact shade. You may also choose one of the commonly used colors shown underneath the color picker area.

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Connectors can be different colors, if you so choose. Besides the Connector Style, you can uncheck the **Show Symbols** box if you'd like to hide the connector's directional arrows. You can also drag the point of a connector to a different node, without deleting and redrawing it.

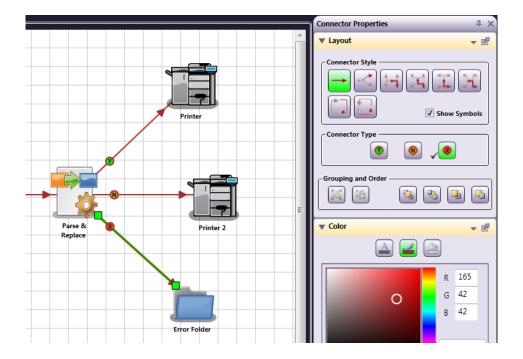


Note: Moving connected nodes very close together, even if those nodes are not touching, will result in the connector line not being visible.

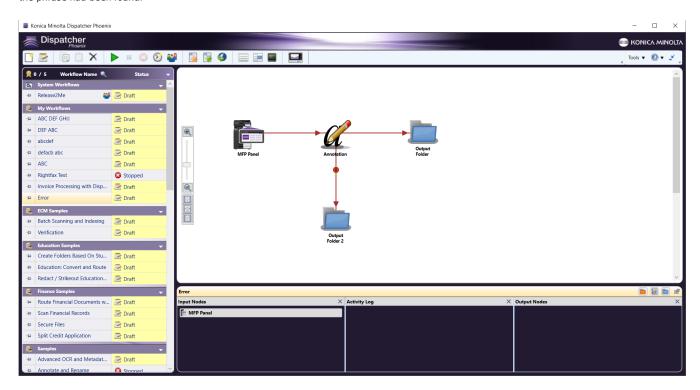
Connector Definition

Connectors of any type can have an Error path, and a connector in a Parse workflow can indicate Yes, No decisions, or an Error. You change the Connector Type under Layout, by selecting the connector and then the Type.

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Within a Parser node, the Connector Type can be determined by a True/False condition. For example, if a Parser Node contains a search for a specific phrase, but the phrase is not found, the workflow can be made to take a different path, transitioning to a different Distribution Point than it would if the phrase had been found.



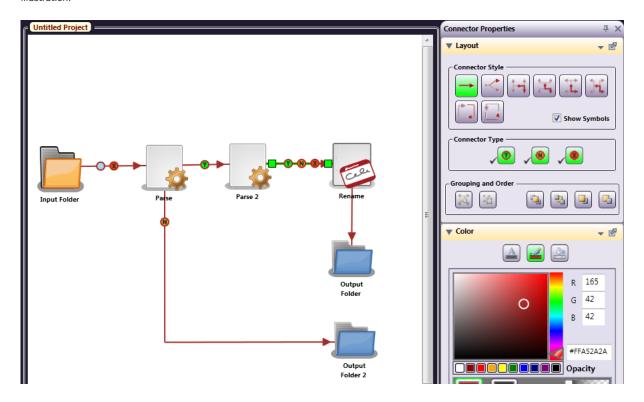
When a process fails, causing an error, the file is either passed to the connector that has the error connector type enabled and connected to the designated error location (typically, an Output folder), or the Default Error Node (if it is defined). If an error occurs and there is no connector with the error connector type enabled or defined Default Error Node, the file can be lost.

Multiple Connectors to the Same Output

When you are creating your workflow in the Workflow Builder, if you want your files to move to the next Node, regardless of the results of a Parser Rule, multiple Connectors can be drawn to the same Output Node. The connectors will be labeled **Y**, for Yes, then **N**, for No, and, if there is a third, **X**,

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for Error. You can manually label a Connector by selecting it and changing the **Connector Type, under Layout**. Please review the following illustration:



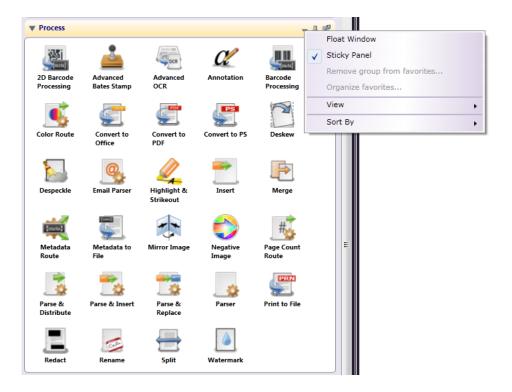
Multiple connections to the same Output Node, from a Regular Node (non-parser), can be labeled as Normal (a blank circle) or Error (red X in a circle). You can choose this Connector type manually, allow the Workflow Builder to label them in order, or de-select the **Show Symbols** check box so that no labels are shown. (Of course, if you hide the symbols, you won't be able to tell that there are two transitions outbound!)

Node Palettes

All nodes are organized into palettes: Collect, Process, Distribute, and Favorites palettes (if defined). With all of these palettes, there are various sorting options available for you so that you can customize the Workflow Builder to best suit your needs. Any changes that you make will be saved for the next time the Workflow Builder is launched.

These options can be accessed by clicking on the down arrow on the palette's title bar, as in the following illustration:

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Using this menu, you can do the following:

- Select **Float Window** to move the palette window anywhere around your Desktop.
- Select **Sticky Panel** to keep the palette open.
- Select Remove group from favorites.... to delete a Favorites grouping.
- Select Organize favorites... to open the Organize Favorites window.
- Select **View** to customize the appearance of the nodes within the palette.
- Select **Sort By** to customize the organization of the nodes within the palette. Options are:
 - $\circ~$ By name (alphabetical), which is the default setting
 - By type, separated by a line
 - By type with no separating line.

For example, all routing nodes (Color Route, Page Count Route, and Email Parser) can be grouped together. Similarly, all parsing nodes (Insert, Parser, Parse & Distribute, Parse & Replace, and Parse & Insert) can be grouped together. The following illustration is an example of sorting a palette by type with a separating line:

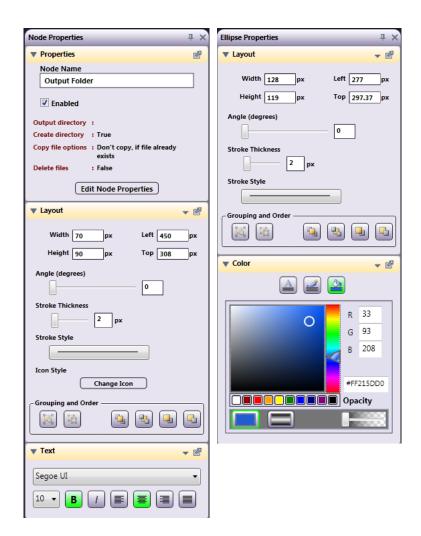
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Properties (Visual)

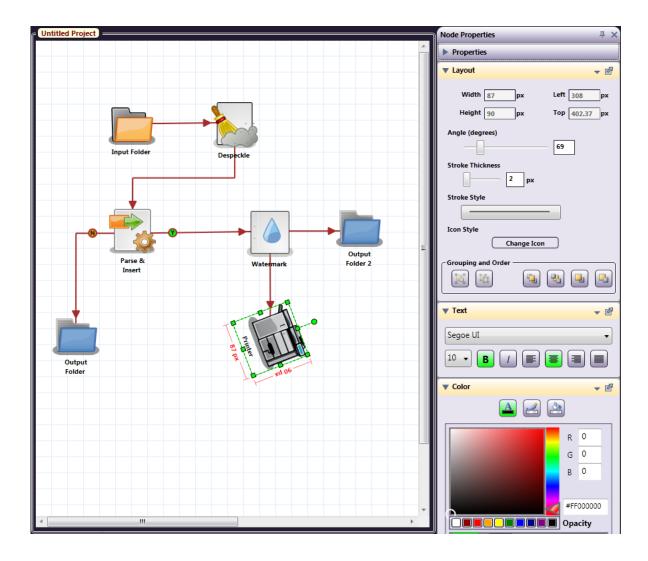
The visual aspects of nodes, shapes, and connectors are defined using the Properties panel. The Properties panel has up to four sections: Properties, Layout, Text, and Color, depending on what kind of object is selected.

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Right-click on a node, shape, or connector and select **Properties** to open the panel. The Layout, Text, and Color sections of the panel (shown below) can be used to change the "look" of the nodes.

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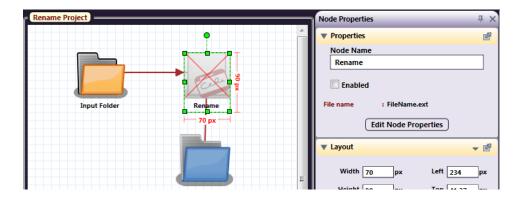
Node Properties

On the Properties section of the Properties panel, you can do the following:

- Edit or create a name for the node on the ${\bf Node\ Name}$ field.
- Enable or disable the node using the **Enabled** check box. When unchecked, the node will be ignored; documents will not be collected from, processed through, or distributed to this node location.

Note: If files are sent to a disabled output node, they will be lost.

A disabled node will be grayed-out with an X through it on the canvas, as in the following illustration:



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Node Layout

On the Layout section of the Properties panel, you can do the following:

- Define the size and position of the object as it appears on the Workflow Builder using the Width, Height, Left, and Top fields.
- Rotate the object on the Workflow Builder using the **Angle** sliding bar.
- · Choose a different image to represent the node.
- · Group and order the objects.

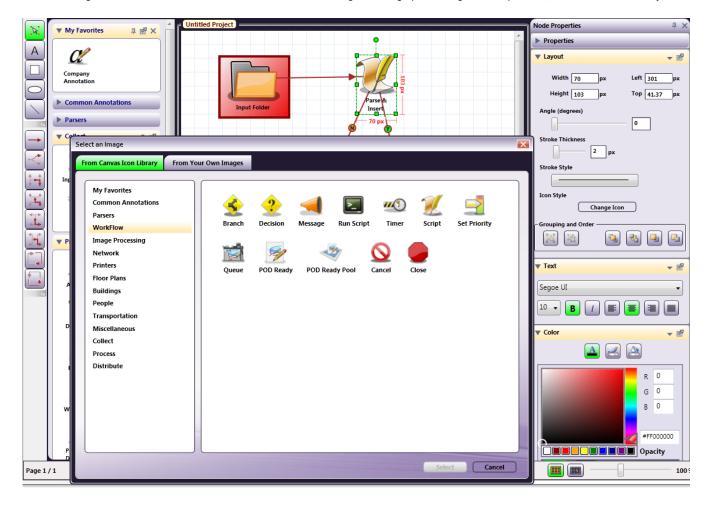
Change Icon

When a node is selected, the Icon style section under Layout has a **Change Icon** button, which allows you to choose an different image to represent the node. You can replace one or more nodes with any image file (BMP, JPEG, PNG, GIF).

- To change an icon, select a node; then select the **Change Icon** button to find and upload the image of your choice.
- On the Select an Image window, do one of the following:
 - Click on the From Canvas Icon Library tab to choose a different icon from the library, or
 - Click on the **From Your Own Images** tab to select an image from a file or the clipboard (assuming that you have copied an image to the clipboard previously).

Selecting From Canvas Icon Library

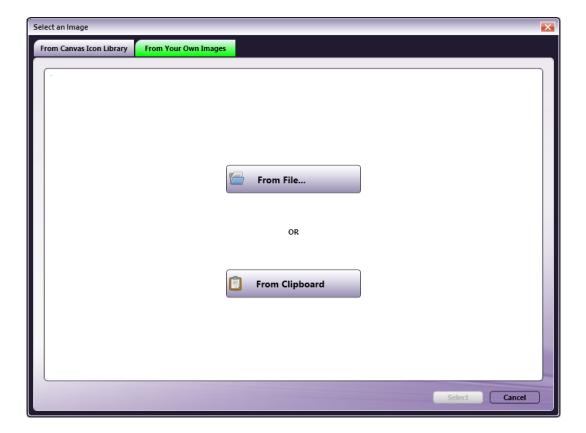
In the following illustration, a Parse & Insert Node was selected and changed to the graphical image of a Script node (from the Workflow library):



Selecting From Your Own Images

Once you have selected the **From Your Own Images** tab, you will be able to choose how to select your image (from a file or from the clipboard), as in the following illustration:

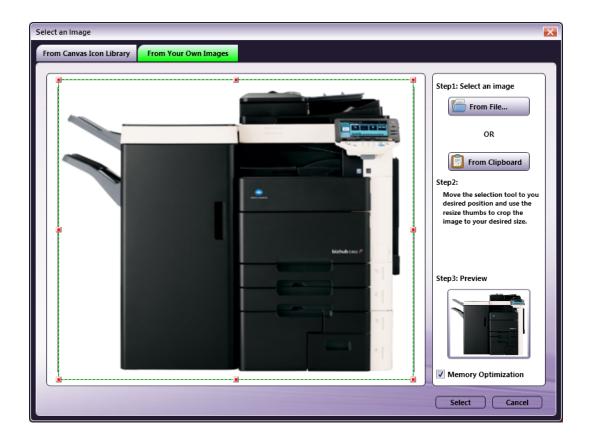
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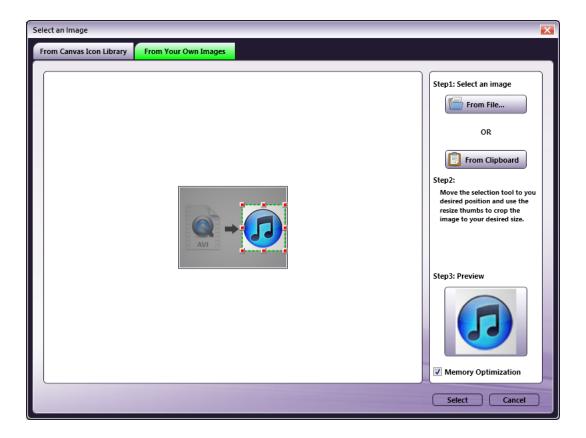
Do one of the following:

• To select an icon from a file, select the **From File...** button. The Select an Image window will appear on which you can find and specify the file that you would like to use. You can choose the part of the image that you want. Click and drag the small box by its handles to do this, as in the following illustration:

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• To select an icon from the clipboard, select the *From Clipboard* button. Instructions are included in the right pane. You can move and/or resize the square to determine which part of the copies image should be used; then select the *Select* button, as in the following illustration:



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A preview of the image you select is shown on the right (see the illustration above). The **Memory Optimization** checkbox is automatically checked for formatting the image for your computer.

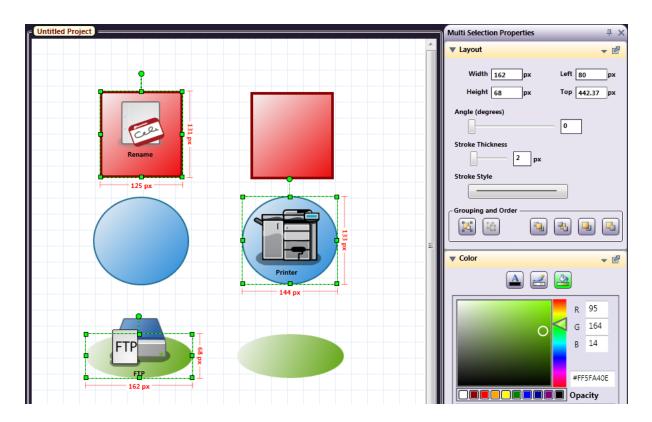
Caution! If you uncheck this box, the image will be enhanced, but it may increase memory usage enough to cause your system to slow down. To upload a picture with higher resolution, uncheck the box, but be aware that the better image will use more resources on your PC.

Note: In all the above mentioned cases, the image for the node is changed, but you have to change the label text yourself.

Grouping and Order

The Grouping and Order subsection allows you to arrange the nodes in the order you choose.

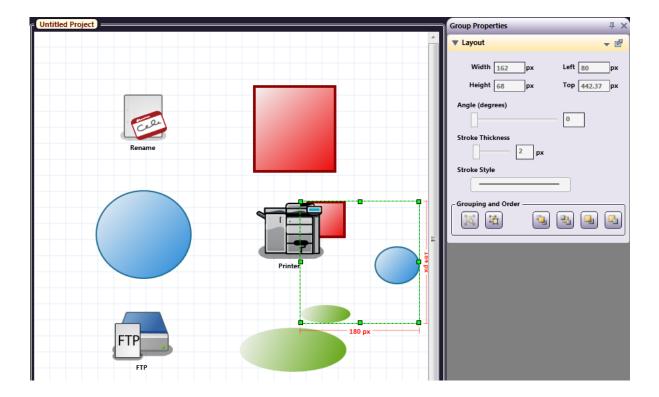
• To send drawing objects behind the nodes, select the object; then click on the **Send to Back** icon, as in the following illustration:



• To group multiple objects, select multiple objects and click on the **Group** icon (). When objects are grouped, they can be resized or moved simultaneously.

In the following illustration, the three objects that were sent to back (above) have been grouped:

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Node Text

On the Text section of the Properties panel, you can configure the font family, size, style, and alignment of the text.

Node Color

On the Color section of the Properties panel, you can configure the color for the text, line, or background of the object.

Copy and Paste Nodes

The following special paste options become available if you copy a Node (ex: the *Input* or *Output* folder): **Paste Duplicate** and **Paste Original**. You will get these special menu options, *only* when you select *Nodes* to Copy. Copying any other element, such as rectangles, text boxes, circles, etc. will allow for only the Paste Duplicate option. If you copy a mixture of nodes and objects, they will also be constrained to **Paste Duplicate**.

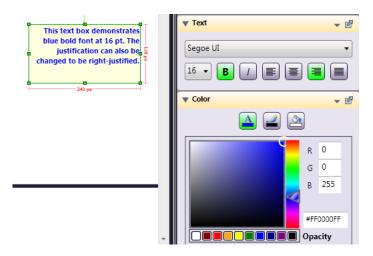
Paste Duplicate will create an independent copy of the node, which will have the same properties until you edit them to make a unique node. If you make a change to this duplicate copy, the changes will not affect the original, copied node.

Paste Original will create another of the same node. If changes are made to the pasted (reference) node, they will simultaneously be applied to the Original node.

Node Label or Text Box

The Text section of the Properties panel becomes available when you have selected either a node (which has a label), or a text box. Use the Text section to change the font, size, style, or justification.

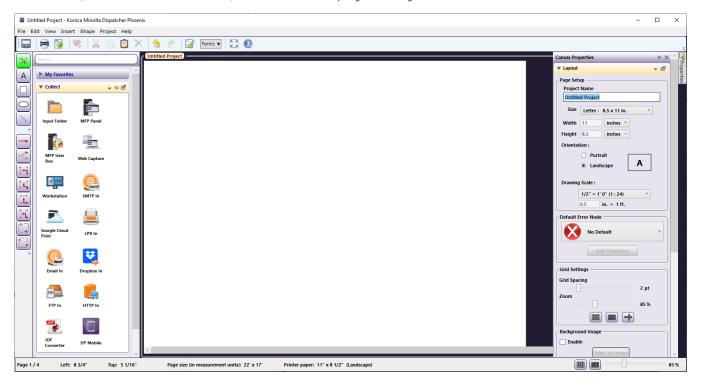
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Building a Workflow

The Workflow Builder is a customized version of Konica Minolta[®] Canvas, specifically for Dispatcher Phoenix, and provides a complete palette of graphical icons and drawing tools that allow you to create workflows.

When you select the **New Workflow** icon or edit an existing workflow from the main application screen, the Workflow Builder window will open. For new workflows, the initial "canvas" will be blank, with the default view opting to "Hide" grid lines.



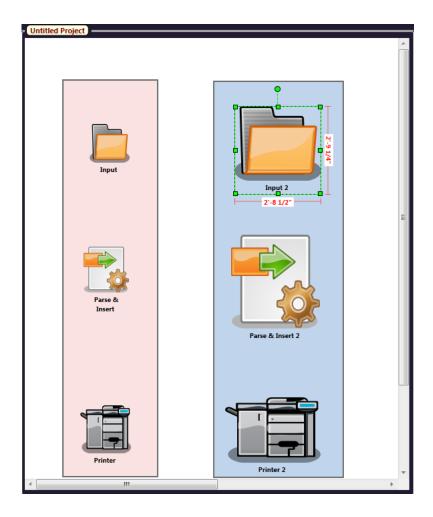
The left side of the (canvas) window contains node palettes. Click on the **pushpin** to keep a node palette open. The node palettes are divided into **Collect, Process**, and **Distribute** groups. In addition, you can add nodes to a **My Favorites** group for easy selection.

Note: When the Workflow Builder is open, the Dispatcher Phoenix functions are unavailable. To work with other workflows (Run, Pause, Stop, etc.) the Workflow Builder must be closed.

Create a Workflow

Nodes are either dropped on the canvas, or you can drag the node to the size you want. The following illustration displays three nodes dropped on the canvas (on the left) versus dragged to size (on the right):

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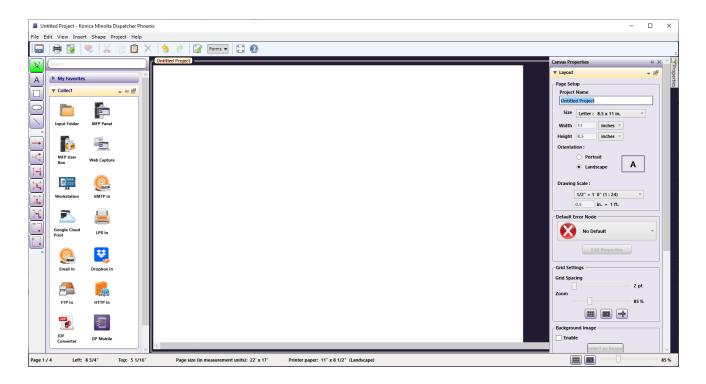


In preparation for creating your first workflow, you may want to create two folders on your desktop: one as Input and one as Output. Put some image files in the *Input* folder, with extensions such as .JPG, .TIF, and .PDF.

Note: If you already made two folders when following the sample exercise, you can use those again.

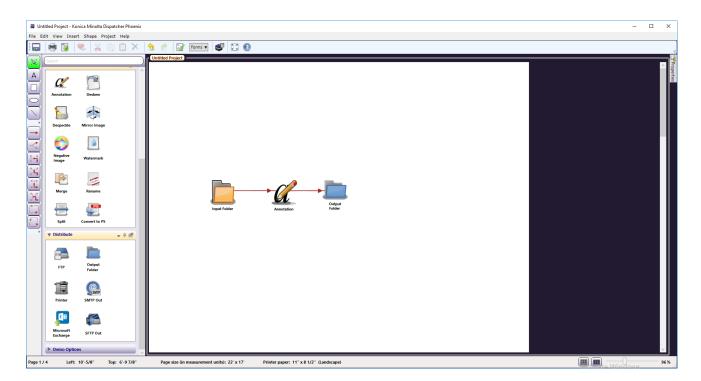
- 1. To begin, open the Collect nodes palette and click on an Input folder node. With the node selected, click on the canvas drawing area and drag the mouse to create and size the node.
- 2. Add a simple Process node for your first workflow, such as **Rename**.
- 3. Add an output folder as the Distribute node. Use the mouse with the gridlines and cross hairs to line up your nodes. Use the **Select/Resize** tool to make any node larger.
- 4. Double-click on the canvas work area to open the Properties panel and name your workflow, as in the following illustration:

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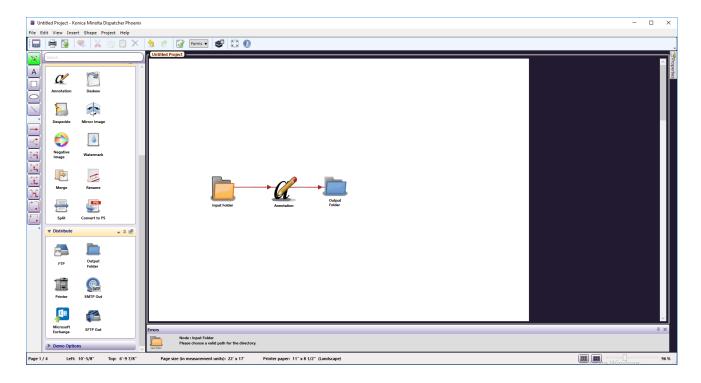
5. Click on a **Connector tool**; then click on the **Input Folder** and hold the mouse button down while dragging the connector from the first node to the next, and then to the last one.

The drawing should now look something like the illustration below with the three nodes connected.



- 6. Select the **Save** icon () or select **Save** from the **File** pull-down menu to save the workflow.
- 7. Select the **Validate** icon () or select **Validate** from the **Project** pull-down menu to validate the workflow (this can be done now or at a later time), as in the following illustration:

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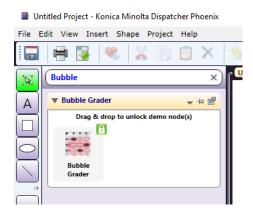
8. If you close the window, a message will appear telling you that the workflow did not pass validation, and asking if you want to fix it before closing the Workflow Builder. (If you haven't named it, it will ask you to do so. This is because we have only drawn the workflow, and haven't yet defined the individual nodes.)

Congratulations, you have created a basic Dispatcher Phoenix workflow! Now to define the different parts of the workflow.

Searching for Nodes

To make it easy to find the node that you would like to add to a workflow, a Search function is available from the **Edit** drop-down menu. Do the following:

1. Enter the name of the node that you are looking for in the empty field provided. This field includes type ahead search functionality so the node palettes that match your search criteria will automatically appear once you begin typing. In the example below, the user is searching for the Bubble Grader node:

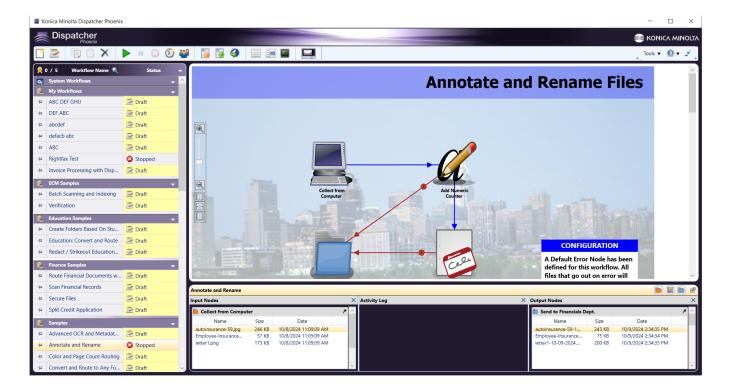


2. To return to the full node palette, click the Clear Search button at the far right of search bar.

Running Workflows

The first time you launch the application, there will be sample workflows for you to use, to get acquainted with the application. The screen will look similar to the one below.

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Using the pushpin to the left of the workflow name (in the Workflow List), you can decide whether to view the workflow steps in the large window on the right (not pinned, as above), or in a small view bottom left.

Both views have a tool bar for your viewing preferences, allowing you to Zoom In and Out, Fit to Width, show the Whole Page, or display as Two Pages (for a large workflow which actually uses at least 2 pages).

Workflow List, Preview and Activity Pane

Just after the menu icons (to the right of the clock icon) there are three icons for showing/hiding the Workflow List, the Workflow, or the Activity Pane for pinned workflows.

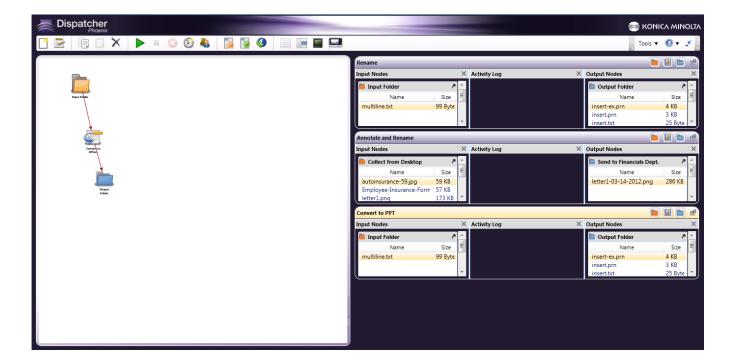


The Workflow List contains a column for Status. The Status column displays what the workflow is doing at the current time. Status options include:

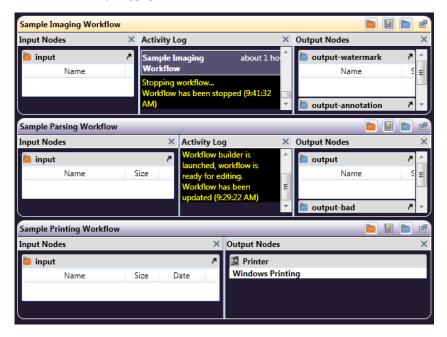
- Draft indicates a new workflow that has not yet been validated in the Workflow Builder
- Processing the workflow is active and running
- Stopped indicates that the workflow is not running or scheduled to run
- Scheduled tells you that the workflow is scheduled and activated
- Paused shows that a workflow is temporarily paused

This example shows the application window with the Workflow List hidden.

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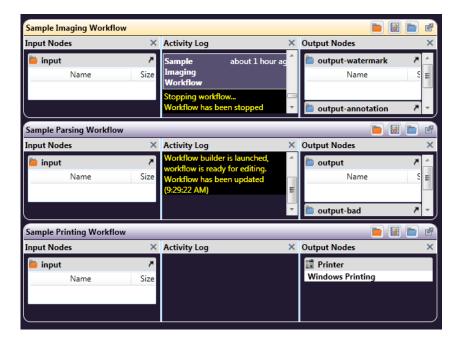


Pin the workflows and scroll through the Activity Pane of each of them, to review the Input, Activity Log, and Output. You can also stretch the length or width of a column, by dragging it to the desired size.

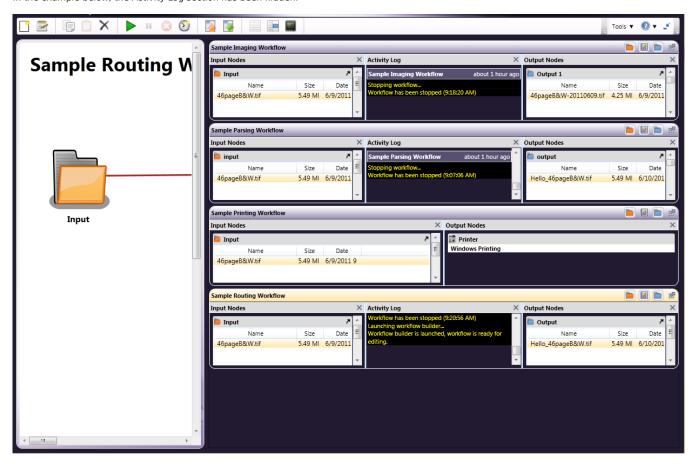


There are icons in the upper right of each workflow's Activity Pane. The first icon toggles the view of the *Input*, the second shows or hides the *Activity Log*, and the third toggles a view of the *Output*. Use the icon of an arrow coming out of a box to have the entire Activity Pane for a workflow "float" anywhere on the screen.

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In the example below, the Activity Log section has been hidden:



Run a Valid Workflow

If you know the workflows in the list are valid, select a workflow and click the **Run** icon (). When you do this, the workflow is read, validated, and then run. If the workflow is valid, the status of the workflow will change to *Running*, then *Processing*. The *Activity Log*, in the right pane, will display the workflow steps as they are performed.

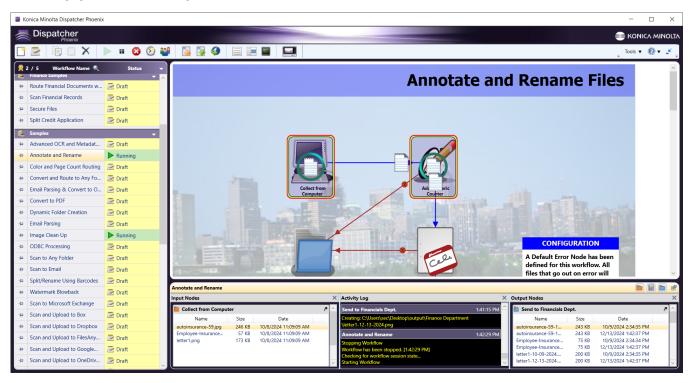
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When you click on the **Run** icon (), a *Starting workflow* notice will display.



Running Multiple Workflows: To run multiple workflows from the same or different Folders, select the workflows from the Workflow List; then click on the Start Workflow icon. All the workflows will be validated and then run. If one workflow fails validation, the rest of the workflows in the list will be stopped

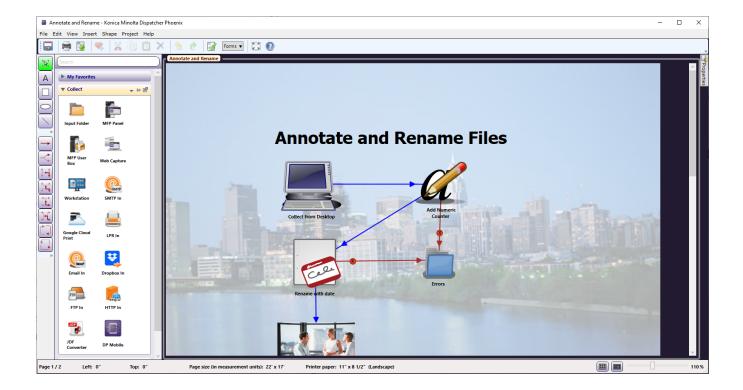
The following figure illustrates a running workflow:



Edit a Workflow

If you double-click on or select a stopped workflow in the list and click on the **Edit** icon, Dispatcher Phoenix will open it in the Workflow Builder so you can make any changes required. To *Edit* a running or scheduled workflow, it must first be stopped or de-activated. The Workflow Builder will open the selected workflow for editing.

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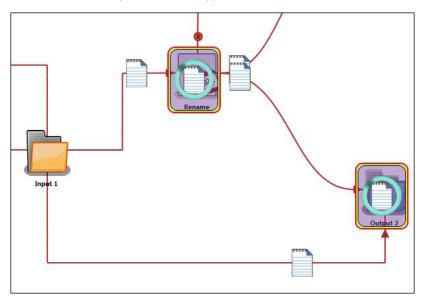


Saving the Workflow

Once you have edited the workflow, you should save it by either clicking on the **Save** icon or choosing **Save** from the **File** pull-down menu. Once the workflow has been saved, the Workflow Builder window closes, and you will return to the main application screen.

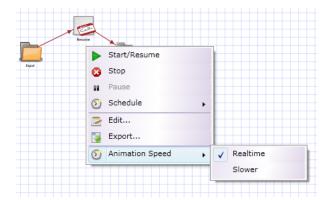
Workflow Animation

When a workflow is running, you will be able to see the nodes acting upon and transitioning files from one location to another. All activities can be viewed on the workflow pane on the main application screen.



Note: If the workflow window has been closed, you will not see the animation. However, it should also be noted that the animation does not run at all when not displayed and, thus, will not use any system resources.

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The workflow animation can be viewed either in real-time or slower. Some workflows are more processing-intensive than other others. For those "lighter" workflows, the animation may progress too quickly to effectively be seen on screen. To slow down the animation of a workflow, *right-click* on the workflow window. Select **Animation Speed > Slower**. Alternatively, you can select **Realtime** to set the speed back to the default.

You may elect not to show animations. From the **Tools** menu in the upper right, click **Enable Animations** to deselect the option (the checkmark will disappear). To re-enable animations, repeat this operation such that the checkmark beside **Enable Animations** reappears.

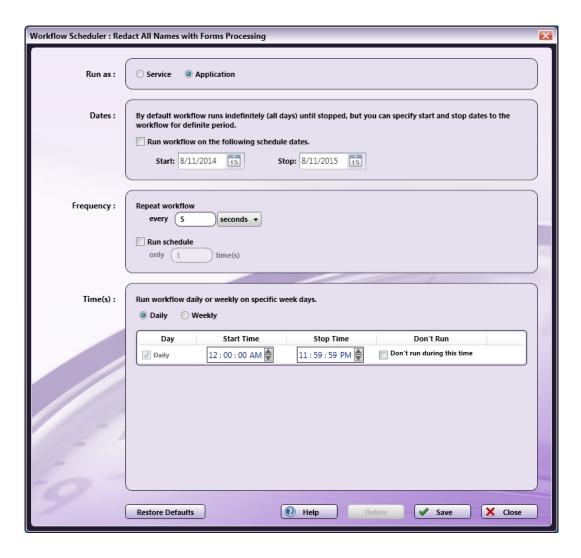
Schedule a Workflow

You can schedule when and how often you want a workflow to run, or even run a workflow as a Service.

Note: An activated, scheduled workflow will use up a license.

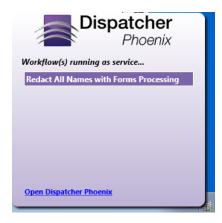
To schedule a workflow, click on the **Workflow Scheduler** button on the top tool bar of the main application screen. The Workflow Scheduler window appears, as in the following illustration:

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Do the following:

- Use the **Run as** section to specify how to run the workflow. Options are:
 - To run the workflow continually while the PC is on (whether the Dispatcher Phoenix application is open or not), select the Service radio button under Run as. An icon will appear in the System Tray while any workflows are set to run as a service. Clicking the icon in the system tray will bring up a list of all jobs currently set to run as a service. This list is not interactive, however, the application can be opened via the Open Dispatcher Phoenix link. If the computer is restarted, these jobs will continue running as soon as the computer is ready.



Note: You can run a workflow as a service without having to configure any dates/times.

- $\circ~$ To set up a schedule for the workflow, select the Application radio button.
- Use the **Dates** section to specify Start and End dates for the workflow. Do the following:

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- · Check the Run workflow on the following schedule dates box.
- Choose the start date by clicking on the **Start** calendar icon.
- Choose the end date by clicking on the **Stop** calendar icon.

Note: A new schedule will show the current date and time by default. However, a previously saved schedule will display the original set date and time, which will, likely, be in the past. This may need to be updated prior to running the workflow.

- Use the Frequency section to specify when and how often to run the workflow. You can:
 - Specify to run the workflow every "x" number of seconds, minutes, or hours using the **Repeat workflow every** fields.
 - Specify to run only "x" number of times by checking the Run schedule box and then entering a value in the blank field below. If you schedule the workflow to run only a certain amount of times within a scheduled time period, Dispatcher Phoenix will try and collect files during that time period; each collection attempt will decrement the "Run only" counter.
- Use the Time(s) section to specify a daily/weekly schedule for the workflow. Do the following:
 - Click the Daily radio button to specify a daily schedule for the workflow; then click on the two-digit hour, minutes, seconds, and AM/PM fields under Start Time and Stop Time and use the arrows to change the time.
 - Click the Weekly radio button to specify a weekly schedule for the workflow. Mark the day that you want to run the workflow using the Day boxes; then click on the two-digit hour, minutes, seconds, and AM/PM fields under Start Time and Stop Time and use the arrows to change the time.
 - **Don't Run during this time:** Check the **Don't run during this time** box to set a time period when the scheduled workflow should not run. For example, if you are scheduling a big job and you don't want to interfere with daily processes, you could set the Don't run time to between 08:00:00 AM and 05:00:00 PM.

Note: The counter will start over at the beginning of every period in which the workflow is scheduled to run. This means that if the workflow is scheduled to run a certain number of times, and also scheduled NOT to run at specific times, the counter will be reset after that restricted time is over.

- · When you have finished specifying scheduling options, do the following:
 - To restore defaults, select the Restore Defaults button.
 - To delete the schedule, select the Delete button.
 - To save and start the schedule for the workflow, select the **Save** button.
 - To exit the Workflow Scheduler without defining or saving a schedule, select the Close button.

Index Form Builder

Use the Index Form Builder to create interactive forms for use on the MFP panel. Using an indexing form at the MFP, you can enter identifying information about your scanned documents as well as choose additional options, such as conversion formats and specific scan destinations.

When designing a form using the Index Form Builder, you can define the following:

- Text, number, and password fields
- Check boxes
- Drop-down lists that display:
 - · Customized list items
 - Root folders and subdirectories for folder browsing
 - Database entries from an ODBC data source
- · Hidden fields that, although not visible on the MFP, can store values to be used by other fields on the form or nodes in the workflow.
- Labels, section headings, and page breaks

Important! The Index Form Builder creates forms that can be used in many different interfaces, including at the MFP, on a **mobile device**, and in **Dispatcher Web**. Some features available within the Index Form Builder may be restricted by limitations of the medium.

Note: Index forms running on an MFP's Native User Interface may display truncated field labels due to MFP limitations.

Accessing the Index Form Builder

You can access the Index Form Builder from either the **MFP Panel node**, **Workflow Builder**, or the **Main Application Screen**. You can also import existing forms into your workflow or MFP Panel node.

Creating New Index Forms Not Associated with a Specific Workflow

Select the Index Form Builder from the Tools menu on the Main Application Screen. A blank index form appears.

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This instance of the Index Form Builder is a standalone tool. You can import forms created using this tool into workflows at a later date.

Creating New Index Forms Associated with a Specific Workflow

Do the following:

- 1. Access the Index Form Builder by doing one of the following:
 - On the MFP Panel node's properties window, check the Attach Index Form box, then click on the + button. The Create New Index Form window appears.
 - From the Workflow Builder, select the **Forms** button. On the drop-down palette that appears, select the **Create new form** button to create a new form. The drop-down palette also lists any existing forms that are associated with the workflow. You can edit or remove these forms, using the icons listed next to the form, as in the following illustration:



2. On the Create New Index Form window, select the Blank Index Form button, as in the following illustration:



Importing an Existing Index Form

You can import existing index forms (*.wfxf files) into your MFP Panel node. Do the following:

- On the MFP Panel node's properties window, check the Attach Index Form box. Then click on the + button. The Create New Index Form window
 appears.
- On the Create New Index Form window, select the Import an existing file button.
- Choose the .wfxf file from the Open window that appears. Then select the **Open** button.

Editing an Existing Index Form from the MFP Panel Node

You can also edit existing index forms that are associated with your workflow. Do one of the following:

- 1. On the MFP Panel node's properties window, check the **Attach Index Form** box.
- 2. Select the appropriate workflow from the drop-down list. Then click on the ${\bf Edit}$ (${\it u}$) button.
- 3. From the Workflow Builder, select the **Forms** button. Then choose an existing workflow from the drop-down list.

Removing an Index Form from the MFP Panel Node

- 1. To remove an index form from a MFP Panel node, check the Attach Index Form box on the MFP Panel node properties window.
- 2. Select the appropriate workflow from the drop-down list. Then click on the Delete (imes) button.
- 3. Select **Yes** on the confirmation button that appears.

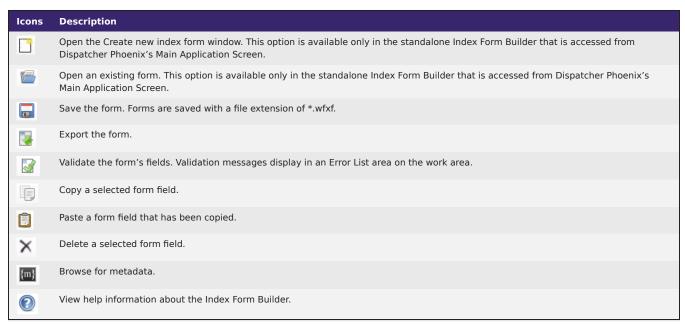
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Components of the Index Form Builder



Tool Bar

Using the tool bar, you can do the following:



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Index Fields

You can add the following fields to your form:

Fields	Description
A Text	A text field allows the user to input text about the scanned document(s), such as document name or vendor name.
17 Number	A number field allows the user to input a number, such as an invoice number or user ID.
*** Password	A password field allows the user to enter a password to be associated with the document. Anything entered into the Password field is automatically masked.
☐ CheckBox	A check box provides the user with a True/False option. For example, a user can choose whether or not to convert the document to Searchable PDF format. Because of the real estate limitations of the MFP control panel, check boxes are represented on the panel as two buttons.
■ Drop Down List	A drop-down list allows the user to choose an item from a list. This drop-down list can be automatically pre-populated with folders or database entries, or you can manually create the list with specific items.
C Date and Time	A date and time field allows the user to associate the date and/or time with the scanned documents.
[:] Hidden	A hidden field can be used to store the results of other fields or default values that need to be associated with the document but do not need to be displayed to the MFP user.
⊘ Label	A label is static text to be displayed on the form.
Section Break	A section break divides the index form into different headings.
Page Break	A page break divides the index form into different screens on the MFP.

Workflow Index Fields

When the Index Form Builder is launched from the Workflow Builder (either via the MFP Panel node or by selecting from the **Forms** button), buttons that represent nodes in the workflow appear in the **Workflow Index Fields** section. You can drag and drop those buttons onto the Index Form work area to add them to your form. For example, to allow the user to specify an output directory for their scanned documents, drag-and-drop the Output Folder button onto the Index Form work area.

One of the workflow index fields that you can define on your index form is for SharePoint. Once you drag-and-drop a SharePoint node button onto the Index Form work area, a list of SharePoint configuration fields appears that match the configuration fields in the SharePoint Distribution node. If the SharePoint Distribution node has already been configured, the fields in the Index Form will populate with default values.

Getting Started

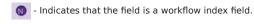
When you open a new index form, a blank form appears in the workflow with the default title of "New Index Form." To customize the name of the form, do one of the following:

- Click on the Form Properties tab and enter a name in the Form Title field, or
- Select the default title on the Index Form's work area. In the Page Title field, enter a name for the index form.

Adding Index Fields to the Work Area

You can begin adding fields to your form by dragging-and-dropping the buttons listed on the left hand side of the window into the Index Form Builder's work area. You can also double-click on the buttons to add them to the work area.

The following icons may appear next to fields in the work area:



- Indicates that an event is associated with the field.

Deleting Index Fields from the Work Area

Once in the work area, each index field includes a **Delete** button underneath it. To delete an index field from your form, select that **Delete** button. Then select **Yes** on the confirmation message that appears.

Moving Index Fields around the Work Area

You can rearrange the order of the index fields by dragging and dropping the fields on the work area.

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Configuring Index Fields

When you select a field on the Index Form Builder's work area, the properties for the selected field appear on the left-hand side of the window. This is where you can configure the field to suit your purposes.

Exporting Index Forms

You can export your index form to use in other workflows. This feature is available in the Index Form Builder that is launched from the Workflow Builder as well as the Index Form Builder that is used as a standalone tool. To export your index form, select the **Export** button on the Index Form Builder's tool bar.

Note: If the form includes any workflow fields, those fields will be converted to standard index fields when you export the index form. A warning message about this will appear before the export operation completes.

Adding a Text Field

To add a text field to your form, drag and drop the Text button to the Index Form's work area. To customize its properties, select the newly created text field.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the **Friendly Name** field, enter the text that will appear above the text field on the MFP. The Friendly Name will always be visible to users at the MFP.
- In the **Default Value** field, specify default text that will appear in the field when the form first loads.
- In the Min Length and Max Length fields, specify a minimum and maximum number of characters that can be entered.
- · In the Options area, you can specify the following:
 - Required Set as a mandatory input field.
 - Read only Set as a read only field that cannot be changed.
 - Sticky Keep values in the field across all documents in the batch.
 - Mask input Mask any text entered by the user.
 - **Allow duplicates** Allow the user to duplicate the field on the MFP panel. Once this option is enabled, a + button will appear next to the field in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.
 - Add action button Add a button to appear next to the field. You can define the behavior for this button when it is tapped on the MFP panel. Note that the Action button does not appear if the form is displayed on an MFP with a native User Interface, in this case, events are triggered when the user changes the contents of the field. When this option is enabled, you are allowed to modify the default text of "Caption" on the Action button by editing the text in the Action Button Caption field.
 - Add lookup Display tabular data with multiple columns while indexing. When this option is enabled, you can set up an ODBC lookup
 query, choose the columns to display, and then specify the sequence of steps to take once an item has been selected.

Important! The "Minimum length of text to trigger a lookup" feature is not supported at the MFP. The workflow will begin the lookup after the first keystroke.

• In the Add Events area, associate events with the field.

Adding a Number Field

To add a numeric field to your form, drag and drop the **Number** button to the Index Form's work area. To customize its properties, select the newly created number field.

You can do the following:

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• In the **Variable Name** field, enter an internal, identifying name for the field. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the **Friendly Name** field, enter the text that will appear above the number field on the MFP. The Friendly Name will always be visible to users at the MFP.
- In the **Default Value** field, specify the value that will appear in the field when the form first loads.
 - On the MFP Native User Interface: The field will be populated with 0 if a default value is not given.
 - On the MFP Graphical User Interface: The field will be left blank if a default value is not given.
- In the Min Value and Max Value fields, specify a minimum and maximum number of numbers that can be entered.
- In the **Options** area, you can specify the following:
 - Required Set as a mandatory input field.
 - · Read only Set as a read only field that cannot be changed.
 - Sticky Keep values in the field across all documents in the batch.
 - Mask input Mask any text entered by the user.
 - **Allow duplicates** Allow the user to duplicate the field on the MFP panel. Once this option is enabled, a + button will appear next to the field in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.
- In the Add Events area, associate events with the field.

Adding a Password Field

To add a password field to your form, drag and drop the **Password** button to the Index Form's work area. To customize its properties, select the newly created password field.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the Friendly Name field, enter the text that will appear above the password field on the MFP. The Friendly Name will always be visible to
 users at the MFP.
- In the Min Length and Max Length fields, specify a minimum and maximum number of characters that can be entered.
- In the Options area, you can specify the following:
 - Required Set as a mandatory input field.
 - Sticky Keep values in the field across all documents in the batch.
 - **Allow duplicates** Allow the user to duplicate the field on the MFP panel. Once this option is enabled, a + button will appear next to the field in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.
- In the Add Events area, associate events with the field.

Adding a Check Box

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To add a checkbox to your form, drag and drop the **Checkbox** button to the Index Form's work area. To customize its properties, select the newly created checkbox.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the **Friendly Name** field, enter the text that will appear above the check box on the MFP. The Friendly Name will always be visible to users at the MFP.
- Customize the labels for the buttons that will appear on the MFP in the True Button Label and False Button Label fields.
- In the **Options** area, you can specify the following:
 - Check by default Select the "True" button automatically when the form first loads.
 - Read only Set as read only buttons that cannot be changed.
 - Sticky Keep values in the field across all documents in the batch.
 - **Allow duplicates** Allow the user to duplicate the checkbox on the MFP panel. Once this option is enabled, a + button will appear next to the checkbox in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the checkbox buttons. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.

Adding a Drop-down List

To add a drop-down list to your form, drag and drop the **Drop Down List** button to the Index Form's work area. To customize its properties, select the newly created drop-down list.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

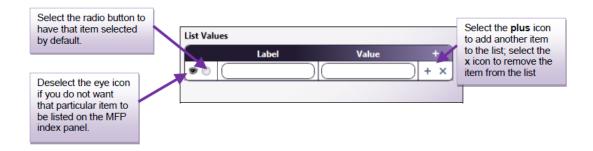
- In the **Friendly Name** field, enter the text that will appear above the drop-down list on the MFP. The Friendly Name will always be visible to users at the MFP.
- In the Options area, you can specify the following:
 - Required Set as a mandatory field.
 - **Read only** Set as a read only field that cannot be changed.
 - Sticky Keep values in the field across all documents in the batch.
 - **Allow duplicates** Allow the user to duplicate the field on the MFP panel. Once this option is enabled, a + button will appear next to the field in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Multi select Allow the MFP user to choose more than one item from the list at a time.
 - Buttons list Displays drop-down list items as buttons on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.
- In the **Add Events** area, associate events with the field.

Manually Adding List Items

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If you do not want to populate the drop-down list with folder locations or database entries, you can manually define the items to be displayed in the drop-down list by doing the following:

1. In the List Values area, click on the + button and an empty field will appear, as in the following illustration:



- 2. In the Label field, enter a 'friendly name' for the list item. This text will be visible to the user on the MFP panel.
- 3. In the Value field, enter a unique value for the list item. This value can be referenced in other nodes in the workflow.

For example:

- Converting scanned documents to other formats. You can allow users to choose from a wider range of file formats for their scanned documents, such as Microsoft Word, Microsoft Excel, and Microsoft PowerPoint. To do so, you would define list items for each file type. For the Word option, the label could be "MS Word" and the value could be "word." That value can be referenced in a Metadata Route node to route incoming files to the Convert to Office node.
- **Allowing user to scan to a limited list of directories.** Instead of using folder browsing, you could manually enter a limited number of available locations to which documents can be distributed. Again, the label would be friendly text for the user, such as "Desktop" and its value could be its corresponding directory path.

Adding Date/Time

To add a field for the user to enter the date and/or time at the MFP panel, drag and drop the **Date and Time** button to the Index Form's work area. This information will be associated with the file as metadata. To customize its properties, select the newly created date/time field.

You can do the following:

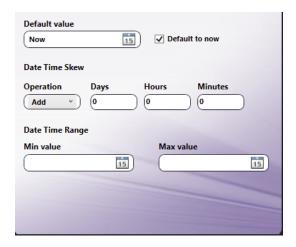
• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the **Friendly Name** field, enter the text that will appear above the date/time field on the MFP. The Friendly Name will always be visible to users at the MFP.
- From the Display type drop-down list, choose the type of information you are trying to gather: Time, Date, or Date and Time.
- From the **Return Format** drop-down list, choose the format to use when writing to the index file. You can also type a format directly into this field; however, it must be in a known format in order to validate.
- In the **Default Value** field, choose or enter a default value for the field. You can click on the calendar icon to access a pop-up calendar or time clock as in the following illustration.

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- If you check the **Default to now** box, the current date/time will be displayed, and the **Date Time Skew** will be enabled.
- In the Date Time Skew section, under Operation you can choose to either add or subtract days, hours or minutes from the Default value.
- In the **Date/Time range Min value and Max value** fields, you can specify minimum and maximum values for the date or time, using the calendar icons to access calendar or time clock pop-ups. You will not be allowed to scan outside of the maximum value range.
- In the Options area, you can specify the following:
 - · Required Set as a mandatory field.
 - Read only Set as a read only field that cannot be changed.
 - Sticky Keep values in the field across all documents in the batch.
 - **Allow duplicates** Allow the user to duplicate the field on the MFP panel. Once this option is enabled, a + button will appear next to the field in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.
- In the Add Events area, associate events with the field.

Adding a Hidden Field

To add a hidden field to your form, drag and drop the Hidden button to the Index Form's work area. To customize its properties, select the newly created hidden field.

Hidden fields are used as temporary variables to store values that can be re-used in the index form. For example, several connectors (e.g., Box Connector, SharePoint Connector) use the **AuthScheme** hidden field to track the type of authentication scheme that is supported by the server. Note that the AuthScheme field is used internally for communication and requires no user input.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax {form:name}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the **Default Value** field, specify the value that will appear in the field when the form first loads.
- In the **Options** area, you can specify the following:
 - Exclude from metadata Do not include the variable as metadata associated with the document.
 - In the Add Events area, associate events with the field.

Adding Static Text

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To add static text to the form, drag a **Label** icon onto your work area. Default text of "Label goes here" will appear. To customize this newly created element, select it and you can edit the text in the **Friendly Name** field.

Adding a Section Heading

To add a section heading to the form, drag a **Section Break** icon onto your work area. Default text of "Section Heading" will appear. To customize this newly created element, select it and you can edit the text in the **Section Heading** field. You can also enable the **Allow duplicates** option to allow the user to duplicate the section on the MFP panel. Once this option is enabled, a + button will appear next to the section in the Index Form Builder and on the MFP control panel. The MFP user would tap on the + button to duplicate the field. If a required field is duplicated, a red star (*) will not appear next to the duplicated field on the MFP panel.

Adding a Page Break

To add a new page to the form, drag a Page Break icon onto your work area. Default text of "Page Title" will appear. To customize this newly created element, select the page break.

You can do the following:

• In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users at the MFP. Spaces are not allowed and will be replaced by underscores (_) if entered. All variable names in an index form must be unique.

This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: {form:[name of variable]} (e.g., if the variable name is 'page1,' the variable name could be referenced in other nodes using this syntax {form:page1}).

The variable name will be listed to the right of the field in the Index Form Builder's work area.

- In the Page title field, enter the text that will appear at the top of the screen on the MFP.
- In the **Options** area, you can specify the following:
 - Hide back button Do not display the back arrow on this screen.
 - Hide next button Do not display the forward arrow on this screen.
 - Hide scan button Do not display the scan button on this screen.
 - Hide home button Do not display the home icon button on this screen.
 - Hide return button Do not display the button on this screen.
 - Hide page numbers Do not display the page number on this screen.
 - Add help text Supply help information about the field. This help information will be accessed on the MFP when the user taps a question mark icon next to the field. When this option is enabled, an "Edit help text" box will appear on which you can enter text.

Expand String Configuration

The Expand String configuration window is used to expand the value of variables listed in associated index fields. It does not require any special configuration; however, there is an option for customizing the Expand String query's friendly name.

To change the friendly name, enter a new name in the text field provided. Then select the Save button to close the window. Any changes made to the friendly name will be immediately reflect on the Index Form Builder.

Overview of Events

You can associate an event or sequence of events to occur under the following circumstances:

- On load An action or series of actions triggered when the form first loads onto the MFP panel.
- On notified An action or series of actions triggered when the field is notified by another field.
- On selection change An action or series of action triggered when a selection has been made at the MFP panel. Note that when a form is initially loaded on the MFP panel, the selection change event will not be triggered until the user actively changes a selection in a text box.
- **Prescan** An action or series of action triggered when the scan button is selected. This option is available from the **Form Properties** tab and is used to validate keywords entered for either SharePoint or OnBase.

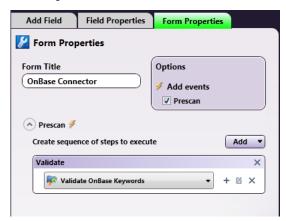
Defining a Prescan Event

To validate OnBase keywords that have been entered when the Scan button is selected, you can define a Prescan event for the form. Do the following:

- 1. Click on the Form Properties tab.
- 2. Check the **Prescan** box in the **Options** area.

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- 3. Choose Validate from the Add button's drop-down list.
- 4. Choose OnBase Data Source from the + button's drop-down list.
- 5. Configure the OnBase Data Source to Validate OnBase Keywords.



Adding an On Action Button Click Event

When defining a text field, you can add a button next to the field that allows the user to browse through folders or database entries, choose from a list of database entries, or perform another action based on user input to the text field.

To add an On Action Button Click Event, do the following:

- 1. Add a text field to your form.
- 2. On the text field's properties panel, check the **Add action button** box under Options. An empty On Action Button Click Event drop-down list will appear along with an On Action Complete drop-down list, as in the following illustration:



- $\ensuremath{\mathsf{3}}.$ You can associate the following with this button:
 - o Folder Browsing, or
 - Windows Explorer-like view of folders, or
 - Future actions to be performed based on user input to text field.

On Action Button Click - Browsing

To associate some kind of browsing with the Action button, do the following:

- 1. Select Show Folder Browser View or Show Explorer View from the Select an action drop-down list.
- Click on the + in the Select a data source to associate with the view box. Then select Folder Browser Data Source or SharePoint Data
 Source. This will open the specific Configuration window from which you can specify what you would like to display on the MFP panel (e.g.,
 folders, SharePoint libraries, etc.)

For Example:

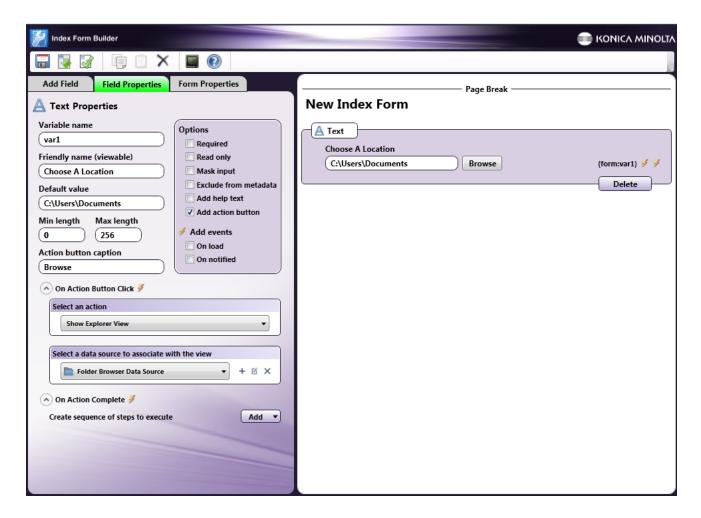
A text field can be defined with the following attributes:

- A label of "Choose A Location" (enter "Choose A Location" in the text field's Friendly Name field).
- An Action button labeled "Browse" (enable the **Add action button** option under the text field's Options and enter "Browse" in the **Action button caption** field).

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An Explorer Browser view with the Root Folder of C:/Users and a Default Folder of C:/Users/Documents (by choosing Show Explorer
View from the Select an action drop-down list. Then select Folder Browser Data Source from the Select a data source drop-down list.
This opens up the Folder Browser Configuration window).

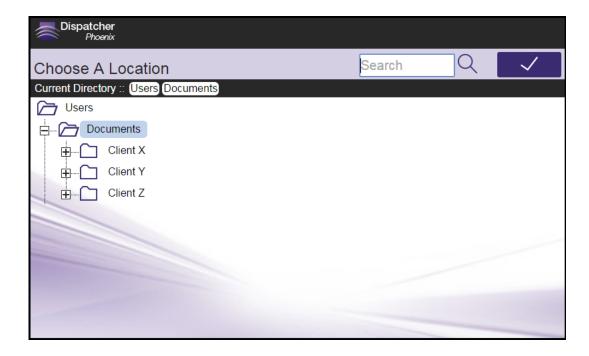
The Index Form would resemble the following illustration:



At The MFP Panel:

At the MFP panel, the user would see a screen with the text field and action button labeled Browse. When the user taps on the Browse button, another screen would appear, displaying the subfolders underneath the default folder. In this case, ClientX, ClientY, and ClientZ are subfolders on the default folder C:\Users\Documents. See the following illustrations:

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On Action Button Click - On Action Complete

To associate the Action Button with an action that will be performed based on user input in the text field, choose the **No action, continue with on action complete event** option. This option is used to populate other fields or drop-down lists based on what the user enters in the text field. For example, if the user enters an employee ID in the text field and taps on the Action button, another field could then be populated with the employee's last name, based on a database query.

Do the following:

- 1. Select No action, continue with on action complete event from the Select an action drop-down list.
- In the On Action Complete area, create the steps that should run once the user inputs text into the field and taps on the Action button. Triggers are:
 - Query Use to set up a query on a data source.
 - Notify Use to notify another field on the index form of a specific action or event.
 - Set Value Use to update a field based on user input or selection at the MFP.
 - Set List Use to populate a drop-down list with the results of a data source query.
 - · Goto Page Use to automatically display another page in the index form after a specific event occurs.
 - Show Alert Use to automatically display a warning message after a specific event occurs.
 - Expand Section Use to signify a placeholder for dynamically created fields (e.g., keywords in SharePoint).

For Example:

If you have a database with two columns (first and last) for first names and last names, you can set up your index form so that the first name of an employee is automatically populated on another field on the MFP panel based on what last name was entered at the panel.

In this case, two text fields should be set up: one for the last name (with a variable name of 'last') and one for the first name (with a variable name of 'first').

The 'last' text field can be defined with the following attributes:

- A label of "Last Name" (by entering "Last Name" in the text field's **Friendly Name** field)
- An Action button labeled "Look Up" (by enabling the Add action button option under the text field's Options and entering "Look Up" in the
 Action button caption field).
- The No Action, continue with on action complete event option enabled (by choosing from the Select an action drop-down list).
- An ODBC database query performed after On Action Complete (by choosing Add > Query in the On Action Complete area and then
 choosing an ODBC data source for the query. The SQL query should be set up to retrieve the first name that is associated with the last name
 that was entered at the MFP panel as follows:

SELECT [first] FROM [customers] WHERE last='{form:last}'

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Where:

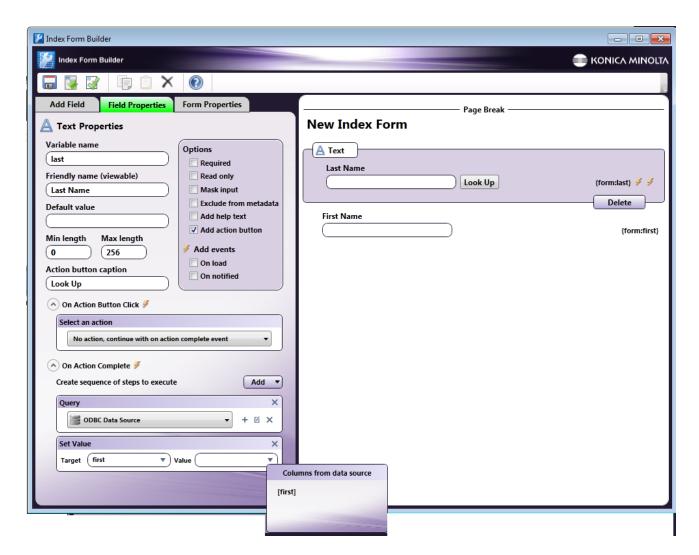
[first] is the name of the column that contains all first names

[customers] is the name of the table

last is the name of the column that contains all last names

{form:last} references what was entered at the MFP for the last name.

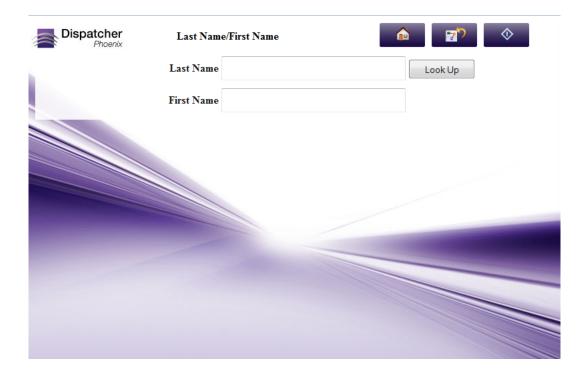
• A **Set Value** trigger that will populate the 'first' text field with the value pulled from the ODBC data source query. When defining the Set Value trigger, use the down arrows on the Target and Value fields to choose a field its corresponding value. See the following illustration:

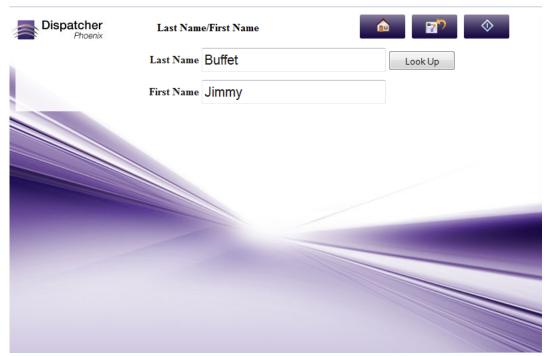


At The MFP Panel:

At the MFP panel, the user would see a screen with two text fields and an action button. When the user inputs a last name in the Last Name field and taps on Look Up, the First Name field would be automatically populated based on the database query. See the following illustrations:

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Defining a Query

One of the events that can be defined is a query. You can query:

- ODBC data sources
- LDAP servers for Email Lookup
- Folders
- Dynamic variables
- Microsoft SharePoint document management system
- Box.com

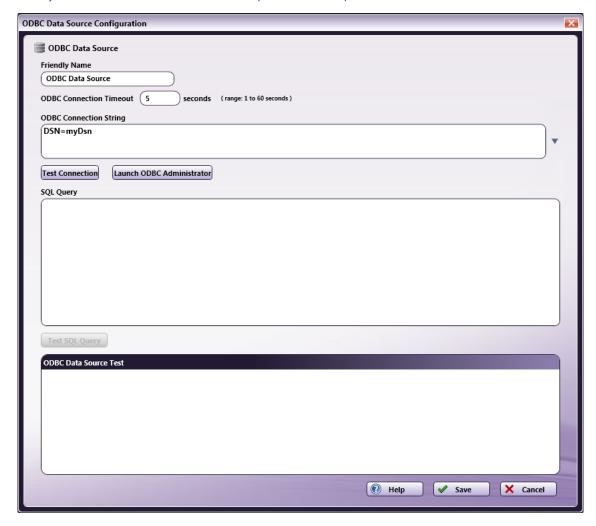
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- WebDAV Servers
- Dropbox
- OneDrive
- OneDrive for Business
- Google Drive
- Workshare
- FilesAnywhere
- FileAssist

To get started, choose Query from the Add button and clicking on the + icon in the Query box. A menu will then appear with these options.

Database Browsing - ODBC Database Configuration

Once you choose ODBC Data Source from the new Query drop-down list that appears, the ODBC Data Source Configuration window will appear, which allows you to connect to a database and run custom queries to retrieve specific records from the database.



On this window, do the following:

- Enter an identifying name for this specific data source query in the **Friendly Name** field.
- Specify a time period (in seconds) for the connection to be established before ending the attempt in the ODBC Connection Timeout field.
- Enter a connection string to connect to the appropriate data source in the **ODBC Connection String** area. The application comes with a list of default strings that you can select and then customize for your system. Click on the **down** arrow to view and select from a list of strings.
- To make sure that the connection string you entered is valid, select the **Test Connection...** button.
 - If the connection is valid, data will appear in the ODBC Data Source Test area.

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- If the connection is invalid, error messages will appear in the ODBC Data Source Test area.
- To manage database drivers and data sources, select the Launch ODBC Administrator button. Refer to Microsoft Windows documentation for more information on that dialog box.
- To submit SQL queries to the data source, enter SQL statements in the **SQL Query** area.
- To make sure your SQL statements are retrieving the correct records from the data source, select the **Test SQL Query** button. Note that you can add form variables to the SQL query.

For Example:

You can set up a database query to automatically populate a drop-down list with a list of values once the form is loaded on the MFP panel.

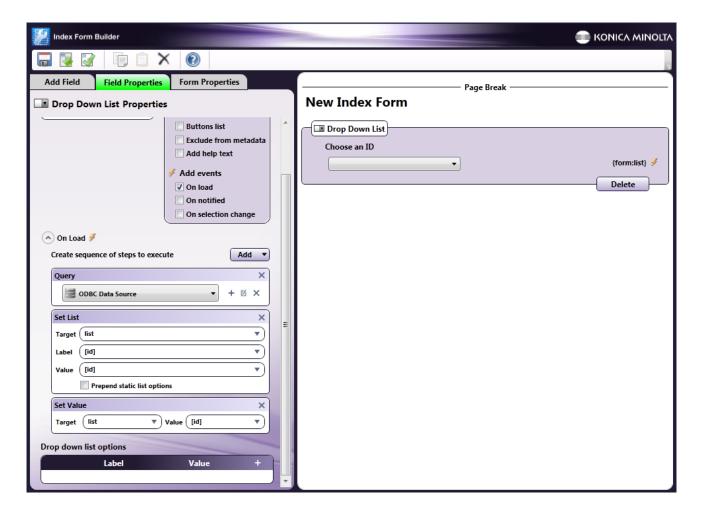
In this case, the drop-down list field can be defined with the following attributes:

- A variable name of 'list' (by entering 'list' into the Variable name field).
- A label of 'Choose an ID' (by entering 'Choose an ID' into the **Friendly name** field).
- An On Load event enabled (by checking the On Load box under the Add Events area).
- An ODBC data source query (by choosing Add > Query in the On Load section and then choosing an ODBC data source). The SQL Query should retrieve the 'id' column in the 'customers' data range of the table, using the following SQL statement:

SELECT [id] FROM [customers]

- A **Set List** trigger in which the drop-down list is populated with the results of the query. When defining the Set List trigger, you can use the down arrows to choose column names from the data source.
- A Set Value trigger that pre-selects the first item in the list when the form is first loaded. When defining the Set Value trigger, you can use
 the down arrows to choose column names from the data source.

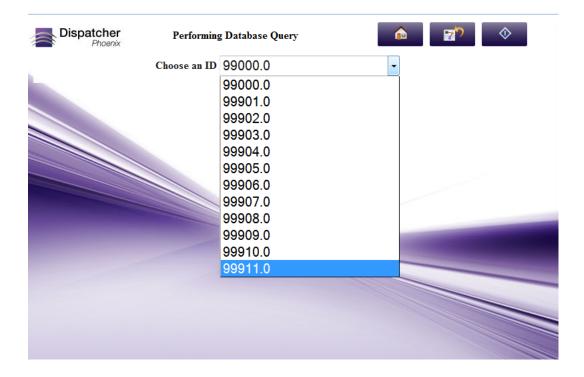
The Index Form Builder should resemble the following illustration:



At the MFP Panel:

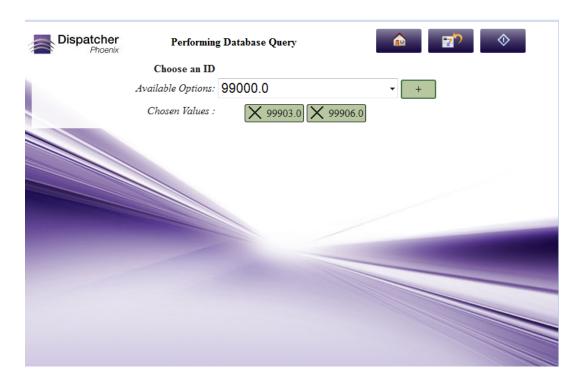
At the MFP panel, the user would see a drop-down list pre-populated with ID numbers, as in the following illustration:

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MULTI-SELECT EXAMPLE:

If you have specified a "Multi-Select" option for your drop-down list, the screen on the MFP will display a + sign to help you select multiple items from the list, as in the following illustration:



Creating an LDAP Query for Email Lookup

You can create an index form that allows users to easily enter or retrieve LDAP user email addresses at the MFP panel. These addresses can then receive scanned documents via email. This feature includes "type ahead" functionality, which automatically displays results from the LDAP server based on characters you enter into the field.

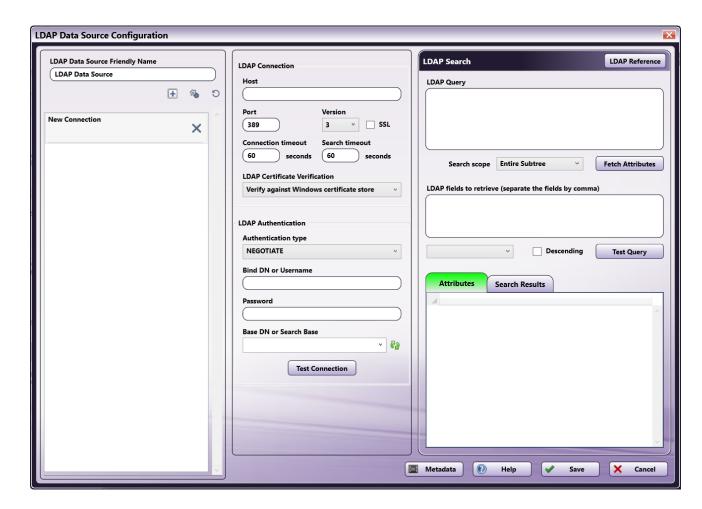
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To create this "Scan to Me" functionality with LDAP Email Lookup, you must configure your index form to perform an LDAP Query, which looks up the email address in the LDAP directory.

Configuring LDAP Data Source

First, add an LDAP Data Source Query to your index form. Do the following:

- 1. In the Index Form Builder, drag-drop a **Text field** onto the Canvas area.
- 2. Under Options, check the Add lookup box for that text field. The Lookup Query fields appear.
- 3. From the Query drop-down list, select the + (Add) button. Then, select LDAP Data Source from the drop-down list that appears.
- 4. The **LDAP Data Source Configuration** window appears. From this window, connect to the LDAP Server and set up your query parameters. See the following illustration:



The next sections describe how to set up the LDAP Data Source Configuration window. When done with LDAP configuration and queries, select the **Save** button.

Connections

When you open the window for the first time, an available "New Connection" will display in the left column. You may use the buttons at the bottom of the area to modify connections:

- Add Connection Add a new LDAP connection. Dispatcher Phoenix supports up to 10 separate connections.
- Save as Default Set Saves the current configuration as the default.
- Restore Defaults Resets the selected LDAP connection to the previously-selected default setting. Note that the Save as Default button must have been clicked first.

Each connection displays information about the connection and includes an **X** button to delete the connection. Connections can be reordered by dragging and dropping them within the Connections area.

LDAP Connection

In the LDAP Connection area, enter the information needed to connect to your company's LDAP server.

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- Host Enter the name of the server where LDAP is hosted.
- Port Enter the LDAP server port.
- **Version** Select the LDAP version from the drop-down list. Note that Version 3 (the default setting) is backward-compatible to versions 1 and 2. For this reason, we recommend you keep the default setting.
- SSL Select this box to require the LDAP server to make an SSL-encrypted connection.
- Connection timeout Enter the maximum number of seconds to establish an LDAP connection. If no connection is made in the allotted time, the connection terminates.
- Search timeout Enter the maximum number of seconds to search for LDAP data before abandoning the search.
- LDAP Certificate Verification If you check the box at the SSL field, use this field to specify your method of LDAP server certificate verification. You have the following options:
 - Verify against Windows certificate store This option verifies the LDAP server certificate using the certification authorities set in Windows. If you select this option, ensure a valid LDAP server certificate issued by a trusted certificate authority is installed on the domain server.
 - **Ignore verification, this is a trusted server** We recommend this option for self-signed certificates. This option accepts any certificate for a TLS connection.

LDAP Authentication

In the LDAP Authentication area, enter the LDAP account information and test the connection. Follow these steps:

- 1. Choose an authentication type for the LDAP connection from the **Authentication type** drop-down list. You have the following options:
 - DIGEST
 - KERBEROS
 - NEGOTIATE This is the default response. This option uses Microsoft Negotiate authentication for the connection.
 - NTLM
 - SIMPLE Note that due to Microsoft security enhancements, as of March, 2020, this option will not sustain a connection unless the **SSL** box is checked and a SSL certificate is installed on the domain server.
- 2. Enter the username of the user authenticating the LDAP connection in the Bind DN or Username field.
- 3. Enter the password associated with the LDAP user account in the **Password** field.
- 4. Click on the Refresh button next to the Base DN or Search Base field. If the authentication credentials provided are correct, the Base DN or Search Base drop-down will automatically populate. You can then choose the appropriate search starting point from the Base DN or Search Base drop-down list.
- 5. Select the **Test Connection** button to test the LDAP connection based on the connection/authentication details entered.

LDAP Query

In the LDAP Query area, enter the LDAP query search string that will be used to search for and return email addresses from the Directory based on what is entered at the MFP. There are two tools available to help you build your query:

- Adding Metadata: To add index form metadata to your query, select the Metadata button to open up the Metadata Browser window. Then drag-drop the appropriate metadata key into the query.
- Using Sample Queries: The LDAP Data Source Configuration window provides sample queries that you can use to configure the query. To view sample queries, select the LDAP Reference button. This brings up a list of Sample Queries (used to retrieve all user emails, user objects, or contact objects). You can then either copy a selected query into the LDAP Query box by selecting the Copy to Query button or copy a selected query to the clipboard for pasting later by selecting the Copy to Clipboard button. See the following illustration for more information:
- From the **Search scope** drop-down list, choose where to search for data (the entire subtree, just the entry requested, or the entries just below the requested entry).
- Select the **Fetch Attributes** button to retrieve all attributes found based on the query entered. The results will be displayed in the Attributes area

LDAP Fields to Retrieve

Now, using the attributes that have been returned from the LDAP query, you can choose which attributes to display about the user on the MFP panel. You can do one of the following:

- Either manually enter an LDAP attribute in the LDAP Fields to Retrieve box, OR
- Double-click an item listed in the Attributes area. That item will then automatically appear in the LDAP fields to retrieve box.

You can also sort your results by selecting an option from the **Sort Column** dropdown. This dropdown menu automatically populates with the items entered in the **LDAP Fields to Retrieve** field. Results will then be grouped by column and arranged alphanumerically. You can reverse the display order by selecting the **Descending** checkbox.

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Note: The attributes listed in this box must be separated by a comma.

Test the Query

You can test the query that you just created to see if the appropriate results are returned by LDAP (without needing to run this workflow on an MFP). To test the query, do the following:

- 1. Select the **Test Query** button. The Metadata Form window appears. This shows you the Index Form field that you just created and allows you to enter characters in the field for testing purposes.
- 2. On the Metadata Form window, enter the appropriate characters.
- 3. Select the \mathbf{OK} button. The results of your query will display in the Search Results area.

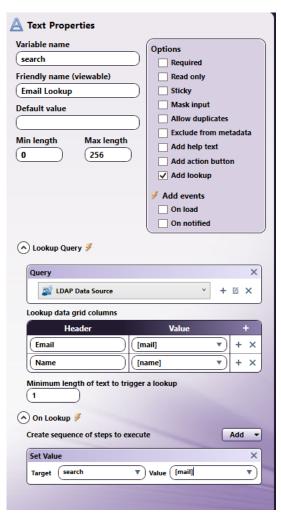
Define the Lookup Data Grids

Once the LDAP Data Source query has been configured, you must add elements to the index form that define the On Lookup behavior.

Do the following:

- 1. Save the LDAP Data Source Configuration window and return to the Index Form Builder tool.
- 2. In the Lookup data grid columns area, select the Add (+) button to add a blank row.
- 3. Specify what should appear when the email address(es) is returned on the MFP's Index Form. Enter a name for the columns in the **Header** fields and choose the values that should populate each column in the **Value** fields. The available values are those items that you specified as attributes in the **LDAP fields to retrieve** field in the LDAP Data Source Configuration window.
- 4. Since this feature supports type-ahead search functionality, enter a value for the minimum length of text that will need to be entered to start the lookup process in the **Minimum length of text to trigger a lookup** field.
- 5. In the On Lookup area, add a Set Value behavior and enter a Target field and value in the supplied fields.

In the following example, the email and user name will be returned from LDAP and displayed at the MFP once the user enters at least one character into the 'search' field. Once a selection is made, the email address of that LDAP user will be displayed in the 'search' field.



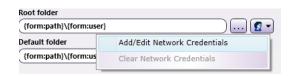
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Folder Browsing

Once you choose **Folder Browser Data Source** from the new **Query** drop-down list that appears, the Folder Browser Configuration window will appear, which allows you to choose which folders to display on the MFP panel.

On this window, do the following:

- In the Friendly Name field, enter a name to identify this specific configuration.
- In the **Root Folder** field, enter the root folder that should be displayed on the MFP panel. This setting will restrict the user's access to only those folders that are below the specified root folder. Click on the ellipsis button to browse and choose the correct folder.
- In the Default Folder field, enter the folder that will be selected by default on the MFP panel. Click on the ellipsis button to browse and choose
 the correct folder.
- When specifying the root folder, default folder, and favorite folders, you have the option of entering network credentials (username and password).
- If the specified path is a custom path, network credentials can still be specified for it. For example, if you are using metadata variables to create a folder on the network share (e.g., ||server|data|{email:to} or {form:path}|{form:user}), you can enter credentials for the path to ensure that the folder is dynamically created.
- To add or modify network credentials, select the Network Credentials button to the right of the ellipsis button. Then choose Add/Edit Network Credentials to open up the Network Credentials pop-up window.



On the Network Credentials window, you can select your username and enter the appropriate password.

Note: Passwords will be stored in encrypted format with the workflow. If the expanded path is an absolute path, network credentials will be ignored when the workflow is running.

This field will also accept and store the username and password as part of the path name. For example, if you enter:

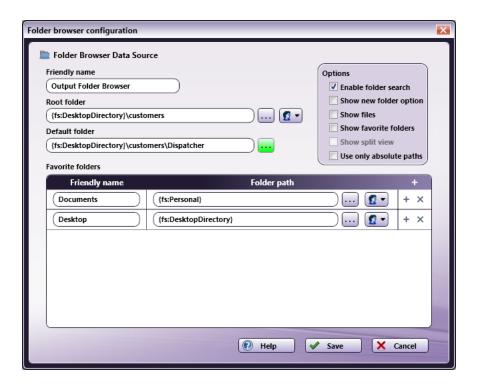
<file://test:test@servername/folder/user>, the username and password (test, test) will be used as the network credentials; in this case, any user-provided network credentials (entered on the Network Credentials window) will be ignored and the password will not be encrypted.

- In the **Options** area, you can do the following:
 - Uncheck the Enable Folder Search box to disable the default type ahead feature when searching for folders at the MFP panel.
 - Check the **Show new folder** box to allow the user to create a new folder on the MFP panel.

Note: This option is only available on MFPs running the Graphical User Interface (not Native).

- Check the **Show files** box to display any files in the Root Folder.
- Check the **Show favorite folders** box to display a list of favorite folders on the MFP panel. When you enable this option, the Favorite Folders area will no longer be grayed out. You can click on the + button in the Favorite Folders area, specify a "friendly name" that will be visible on the MFP panel, and then enter a folder path (or choose one using the ellipsis button) to specify favorite locations, as in the following illustration:

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- Check the **Show split view** box to display both the root folder and the favorite folders on the MFP panel. By default, if the Show favorite folders option is enabled, only the favorite folders are displayed.
- By default, the {fs:DesktopDirectory} variable is used to indicate the Desktop in the Root Folder and Default Folder fields. To make sure that only full paths are specified so that the output location never changes per user, check the **Use only absolute paths** box.

Note: If there is only one folder browsing field on the page, then the results of the folder browsing query will be displayed automatically at the MFP panel. If there are multiple fields on the page, the user will be presented with a screen that lists the multiple fields.

Note: If the file or folder name is too long to fit the display, the name will be truncated.

Type Ahead Folder Searching at MFP

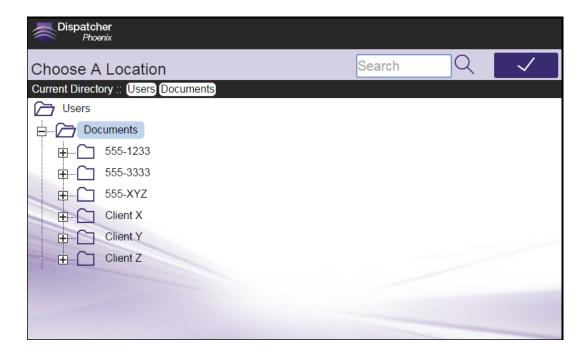
To provide a user-friendly experience and to save time while browsing through folders for a scan destination, Dispatcher Phoenix provides type ahead functionality for folder browsing at the MFP. For example, if a user needs to route a scanned file into a specific folder in a directory with thousands of different folders in it, the user could type in the first few letters of the folder name to filter the list of folders displayed.

Note: By default, only immediate children folders of the currently selected folder will be returned.

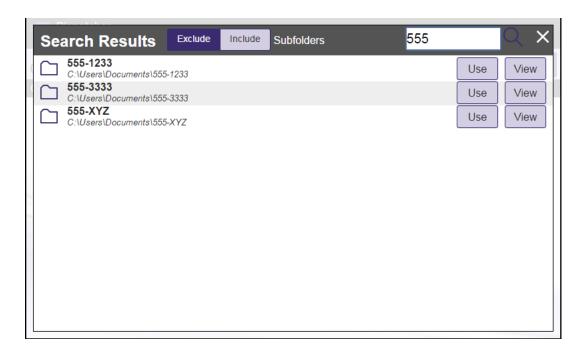
See the following illustrations for instructions on how to search for folders at the MFP:

- 1. On the main folder browsing screen, a **Search** field is provided for you to use to narrow the list of folders. You can enter text into this field. Then tap on the **Search** icon next to the field.
 - If text is entered, the Folder Search Results will return all folders that contain the specified text.
 - The search occurs from the directory you have selected (not the configured root directory).
 - A wildcard asterisk (*) can be used to represent more characters in a string of characters. For example, if entering inv* in the Search field, the folder results would display any folders that *begin* with those three letters (e.g., inv01, inv02, invoice, etc.). Or, if entering *inv in the Search field, the folder results would display any folders that *end* with those three letters (e.g., 01inv, 02inv, etc.)
 - A wildcard question mark (?) can be used to represent an arbitrary character. For example, if entering INV0? in the Search field, the folder results would display INV01, INV02, INV03, etc.

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For example, in the following illustration, the user enters "555" in the Search field with the following results (only those folders with "555" in them are displayed).



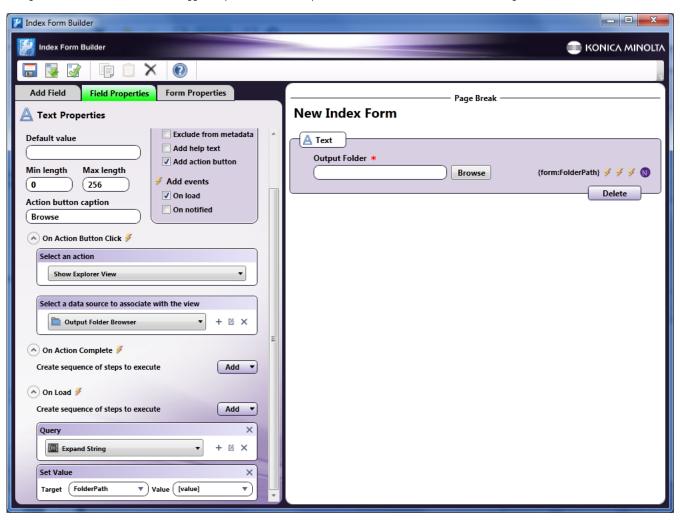
- 2. Once the folder list is filtered per your Search, you can do the following:
 - $\circ~$ Tap on the Use button to select that particular folder.
 - Tap on the **View** button to return to a directory structure view of that particular folder.
 - Release the filter by tapping on the **X** button next to the Search field.
 - $\circ \ \ \text{Include subfolder results in your filtered list by tapping on the \textbf{Include Subfolders} \ \text{button}.$

Expand String Queries

With the Expand String Query, any folder paths that contain dynamic variables are automatically expanded to their actual values once the form loads on the MFP.

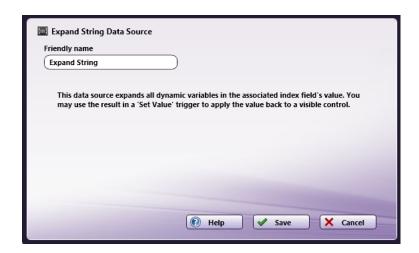
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When you add an Output Folder workflow index field to your index form, the Expand String Query will be automatically added as part of the field's configuration. In addition, a Set Value trigger is specified for the Output Folder's variable name, as in the following illustration:



If you are adding a folder browsing query manually, you must do the following:

- 1. Add an On Load action.
- 2. Specify an Expand String query by selecting **Query** from the **Add** button and then clicking on the + icon. Once selecting the **Expand String Data Source** option, the Expand string configuration window will appear, as in the following illustration:



3. Back on the Index Form Builder, add a **Set Value** trigger where the **Target** field is the variable name of the Output Folder and the **Value** is [value].

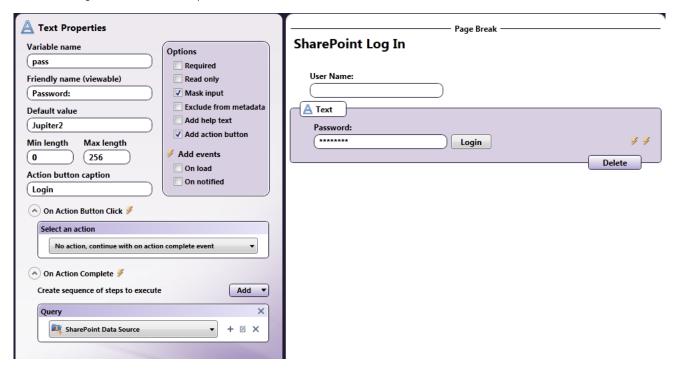
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Validate SharePoint Login Example

You can set up an index form that allows the user to log into SharePoint. Do the following:

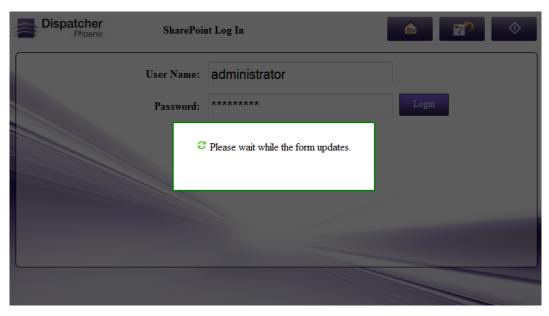
- Add one text field with a friendly name of "User Name."
- Add another text field with a friendly name of "Password." Make sure this field has the "Mask Input" option enabled.
- Associate an action button with the caption of "Login" with the Password field.
- Configure the action button with an On Action Complete event that queries SharePoint with the Validate SharePoint Login action.

See the following illustration for an example:



At The MFP Panel:

At the MFP panel, the user would see the Login credentials fields. When a user name and password is entered, the index form would perform the Validate SharePoint Login action, as in the following illustration:



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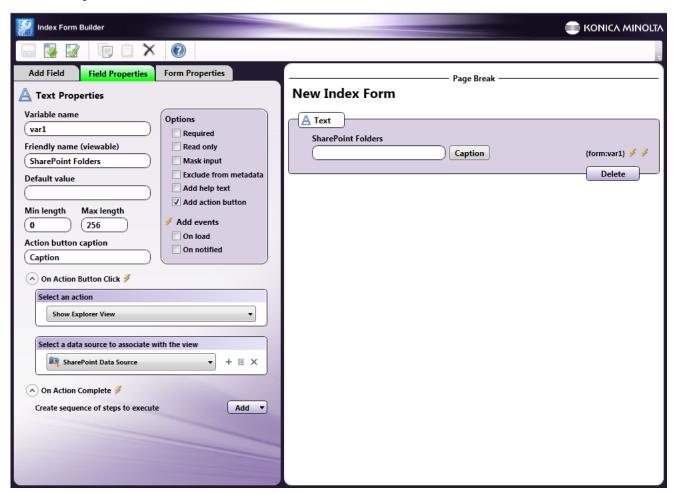
Get SharePoint Libraries/Folders Example

You could set up an index form to automatically display a Windows-Explorer like view of SharePoint libraries and folders.

In this case, configure a text field with an action button that has the following properties:

- On Action Button Click with an action of "Show Explorer View."
- Under the Select a data source to associate with the view, choose "SharePoint Data Source."
- On the SharePoint Data Source Configuration window, choose the "Get SharePoint Libraries/Folders" action.

See the following illustration:



Note: Since you are only defining one Get SharePoint Libraries/Folders field on the page, then the results of the SharePoint Libraries/Folder retrieval will be displayed automatically. If there are multiple fields on the page, the user will be presented with a screen that lists the multiple fields.

At The MFP Panel:

At the MFP panel, the user would see the specific libraries and folders within the SharePoint site, as in the following illustration:

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Defining a Set Value Trigger

Use the Set Value trigger to update a field based on what a user has selected or entered at the MFP. For example, you could use this trigger to populate a hidden field with a value that was selected from a list on the index form.

To define a Set Value trigger, do the following:

- 1. Choose Set Value from the Add button. An empty Set Value box will appear.
- 2. In the **Target** field, use the down arrow to choose from a list of variable names on the index form.
- 3. In the Value field, use the down arrow to choose from a list of column names that were returned from the query.

Important! When referencing columns in the data source, square brackets ([]) must be used around the column name. For example, if you need to access the 'client' column from the results of a SQL query, you must enter: [client]; if square brackets are not used, the text will be treated as static text.

Defining a Notify Trigger

Use the Notify trigger to alert a field of another action. This notification will trigger the field to perform another action or series of actions.

To define a Notify trigger, do the following:

 $1. \ \ Choose \ \textbf{Notify} \ \ from \ the \ \textbf{Add} \ \ button. \ An \ empty \ \ Notify \ box \ will \ appear, \ as \ in \ the \ following \ illustration:$



2. In the **Target** field, choose or enter the variable name of the field that you would like to notify. You can use the down arrow to choose from a list of variables in your form.

Defining a Set List Trigger

Use the Set List trigger to populate a drop-down list with the results of a query. To define a Set List trigger, do the following:

- 1. Choose Set List from the Add button. An empty Set List box will appear.
- 2. In the Target field, use the down arrow to choose the variable name of the drop-down list that you would like to update.
- 3. In the **Label** field, use the down arrow to choose from a list of columns returned from the query. The contents of the column that you choose will be displayed in the drop-down list.
- 4. In the **Value** field, use the down arrow to choose the value that needs to be associated with the label. The specified value can be used as a reference in other events within the form.

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Important! When referencing columns in the data source, you must use square brackets around the column name. For example, if you need to access the 'client' column from the results of a SQL query, you must enter: [client]; if square brackets are not used, the text will be treated as static text

5. To prepend the list with static text, check the **Prepend static list options** box. Then, in the Drop down list options area, enter your static text list item.

For Example (#1):

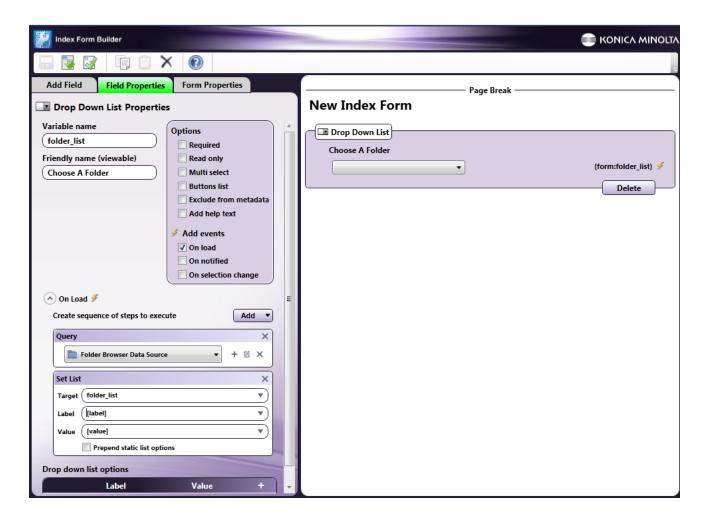
You can set up a folder browser to automatically populate a drop-down list with a list of folder path locations once the form is loaded on the MFP panel.

In this case, the drop-down list can be defined with the following attributes:

- A variable name of 'folder_list' (by entering 'folder_list' into the Variable name field).
- A label of 'Choose a Folder' (by entering 'Choose a Folder' into the Friendly name field).
- An On Load event enabled (by checking the On Load box under the Add Events area).
- A Folder Browsing query (by choosing Add > Query in the On Load section and then choosing Folder Browser Data Source). When setting up
 the Folder Browser configuration, make sure that the Show Files option is disabled.
- A Set List event targeting the 'folder_list' field, which references the results of the folder browser query (by choosing Add > Set List in the On Load section). Use the 'label' and 'value' variables to populate the drop-down list with a list of folder paths returned from the Folder Browser query.

Note: When using this variable name, the full path of the folder will not be displayed, only the child folder name. To display the full path, you would have to add it as static text before the variable name when defining the Label in the Set List event.

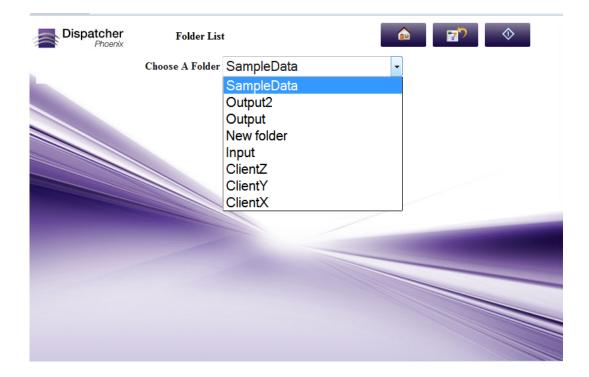
See the following illustration:



At The MFP Panel:

At the MFP panel, the user would see a drop-down list pre-populated with folder paths, as in the following illustration:

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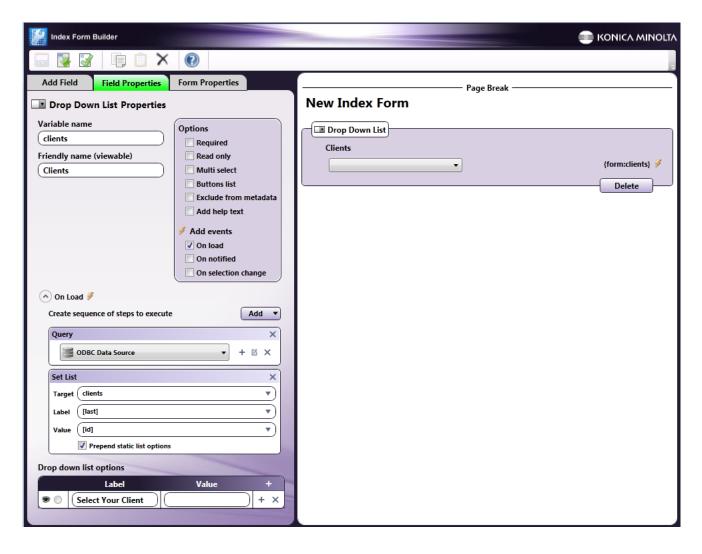
For Example (#2):

You can set up a drop-down list to include items of last names from a database query, with the static text of "Select Your Client" as the first item.

In this case, the drop-down list can be defined with the following attributes:

- A variable name of 'clients' (by entering 'clients' into the **Variable name** field).
- A label of 'Clients' (by entering 'Clients' into the **Friendly name** field).
- An On Load event enabled (by checking the **On Load** box under the **Add Events** area).
- An ODBC data source query (by choosing Add > Query in the On Load section and then choosing an ODBC data source).
- A Set List event in which the drop-down list is populated with the results of the query and the Prepend static list options box is enabled.
- A drop down list options item entered with the label of "Select Your Client" and an empty Value field, as in the following illustration:

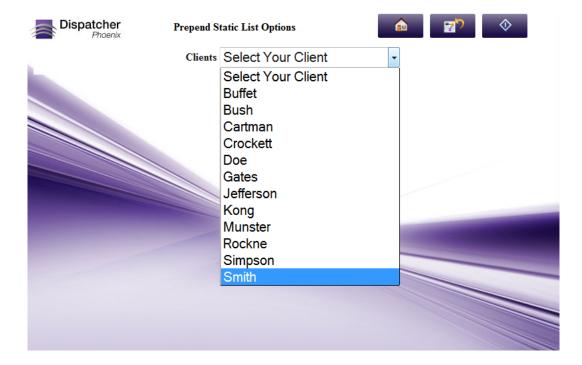
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At The MFP Panel:

At the MFP panel, the user would see a drop-down list pre-populated with client names with the top item being "Select Your Client," as in the following illustration:

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Defining a Goto Page Trigger

Use the Goto Page trigger to have another page in the index form automatically display after a specific event occurs. For example:

- · After the user makes a selection on the panel, the form automatically goes to a different page of the index form.
- The user logs into a document management system, such as OnBase, and, once validation is successful, another page on the index form automatically appears.

To define a Goto Page trigger, do the following:

- 1. Choose Goto Page from the Add button. An empty Goto Page box will appear.
- 2. In the **Target** field, use the down arrow to choose the variable name of the page that you would like to go to.
- 3. To limit Goto Page to be triggered *only* when a specific condition is met, check the **Condition** box. Two additional fields will appear: When and Equals.
- 4. In the When field, use the down arrow to choose from a list of conditions returned from the data source query.
- 5. In the **Equals** field, enter the specific result for the condition in brackets.

For Example:

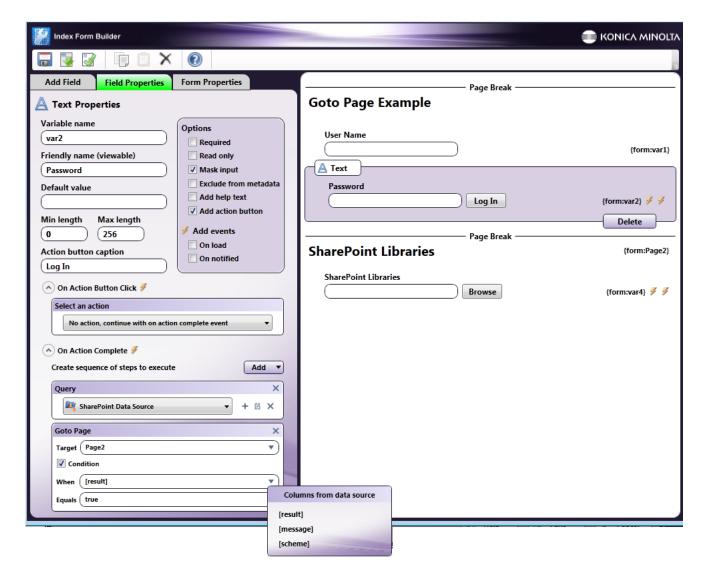
Set up an index form to go to the second page of an index form once the user has successfully logged into SharePoint at the MFP.

In this case, the index form would be set up with:

- Log in fields configured with the Validate SharePoint login action.
- A page break with the variable name of Page2.
- An Explorer-like view of SharePoint libraries and folders.
- A **Goto Page** trigger in which Page2 is displayed once validation is successful. Note that the **Conditions** box is enabled, and the **When** field returns [result], [message], and [scheme]. Choose [result] from the list.

See the following illustration:

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At The MFP Panel:

At the MFP panel, the user would see a login screen. Once the user enters the correct login credentials, the second page would automatically appear. See the following illustrations:

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Defining a Show Alert Trigger

Use the Show Alert trigger to display an alert message automatically after a specific event occurs. For example, if login validation fails, an error message can be displayed. The message can either be pulled from the data source or entered directly into the Index Form Builder for display on the MFP.

To define a Show Alert trigger, do the following:

- 1. Choose Show Alert from the Add button. An empty Show Alert box will appear.
- 2. In the **Message** field, use the down arrow to choose from a list of column names returned from the data source query, or type the text that you want to appear in the alert box. To limit the Show Alert to be triggered *only* when a specific condition is met, check the **Condition** box. Two additional fields will appear: When and Equals.

For Example:

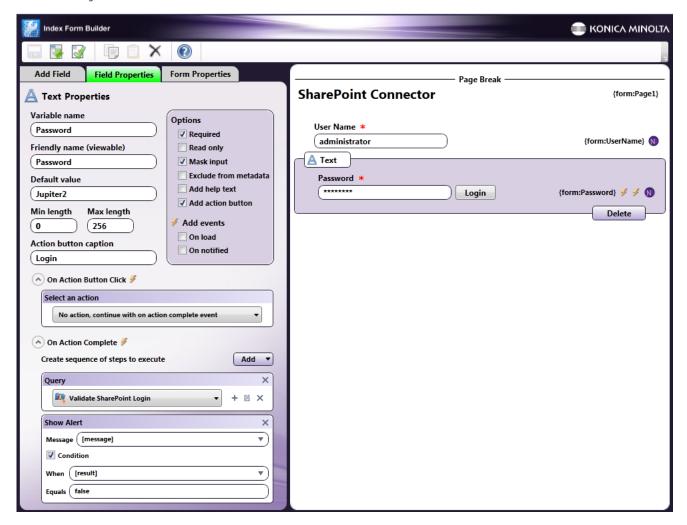
You can set up an index form to allow the user to log into SharePoint. If login is unsuccessful, you can display an alert message coming from SharePoint.

In this case, the index form would be set up with:

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- Log in fields configured with the Validate SharePoint login action.
- A **Show Alert** trigger in which a message from SharePoint appears once login fails to validate. Note that the **Conditions** box is enabled, and the **When** field is specified with [message] which retrieves data from the message column in the data source.

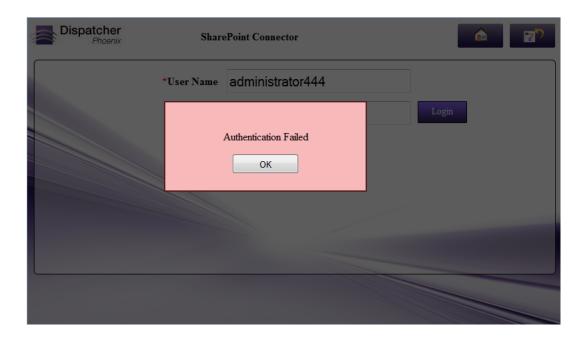
See the following illustration:



At The MFP Panel:

At the MFP panel, the user would see the following message alert once invalid login credentials are entered:

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Defining an Expand SectionTrigger

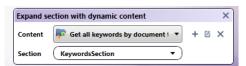
To display dynamic fields from a data source such as OnBase, SharePoint, and Worldox define a placeholder using the Expand Section trigger.

To define an Expand Section Trigger, do the following:

- 1. Choose Expand Section from the Add button. An empty Expand Section box will appear.
- 2. Specify the content for the section by clicking on the + icon next to the **Content** drop-down list. You can get content from any data source, such as ODBC, OnBase, and SharePoint.
- 3. In the **Section** field, enter or choose the section in which you want the fields to appear.

For Example:

You can set up the index form to allow the user to display keywords from OnBase in another section of the index form based on the Document Type that was selected at the MFP. In the following example, the Expand Section box would be customized as in the following illustration:



Installing Demo Nodes

To allow you to experience and experiment with the full power of the Dispatcher Phoenix platform, trial licenses are available for all Dispatcher Phoenix features for you to install and use for 30 days. For example, if you are a current user of Dispatcher Phoenix and interested in automated Bates stamping, you can add a 30-day trial license of the Advanced Bates Stamping process node to your current installation. All demo nodes are allowed for commercial use and include the same functionality as a fully licensed node.

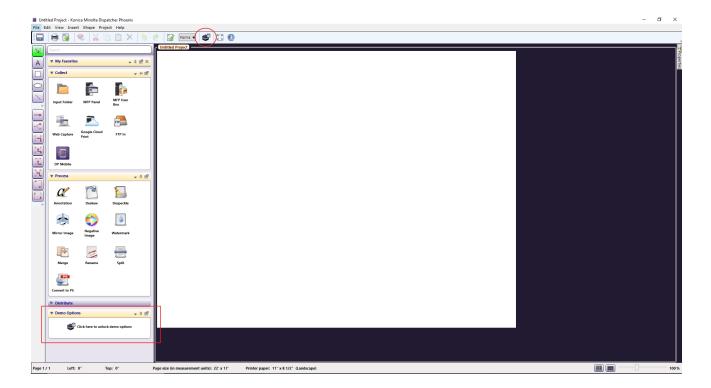
Note: Demo nodes are available only for **Dispatcher Phoenix**. They are not available for **Dispatcher Phoenix ScanTrip** and **Dispatcher Phoenix** Release2Me+.

Installing a Demo Node

To install a demo license of a Dispatcher Phoenix node, do the following:

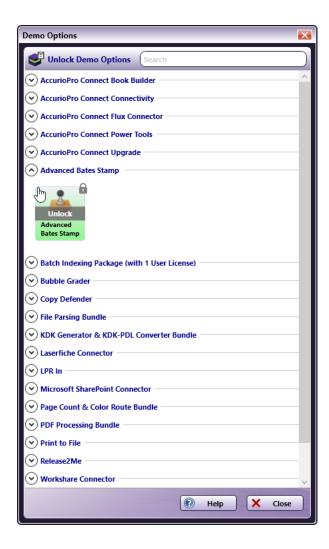
- 1. Open the Workflow Builder Tool. You can create a new workflow by selecting the **New Workflow** button on the Dispatcher Phoenix client application, or edit an existing workflow by double-clicking on the workflow in the **Workflow List**.
- 2. To view and install a demo node, select the **Click here to unlock demo options** button in the **Demo Options** palette, below the standard **My Favorites**, **Collect**, **Process** and **Distribute** palettes on the left side of the Workflow Builder tool.

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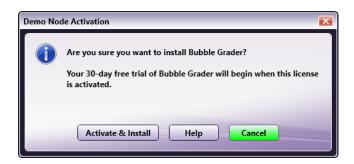
- 3. Alternatively, you can click the **Unlock Demo Options** icon, (), from the toolbar.
- 4. The demo nodes are organized by the purchasable bundles that they belong to. To view the nodes included within a bundle, click the bundle name or the down arrow to expand the node palette. The lock icon in the upper right corner of the node icon signifies that this feature is available for demo.
- 5. To install a demo node, mouse over the node and select **Unlock**. A confirmation window will appear.

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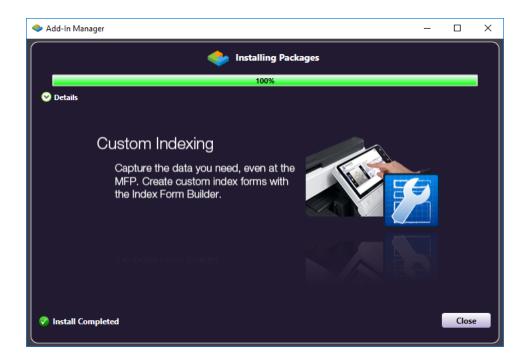
6. To activate the 30-day trial license, select Activate & Install on the confirmation window. To cancel the activation, select Cancel.

Note: All nodes within the bundle will be installed when you activate a trial license for one of the nodes in the bundle. The license will expire 30 days from the day the node(s) are activated. There is no limit on how many Dispatcher Phoenix bundles can be demoed concurrently.



7. Upon confirmation, a **User Account Control** window may appear asking for permission for Add-In Manager to make changes to your system. Select **Yes**. The Add-In Manager will launch to automatically activate and install all demo nodes belonging to the selected bundle.

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- 8. Once Add-In Manager has completed the installation, select the Close button. After a Demo node is activated, the following occurs:
 - The node is added to the **Demo Options** node palette in the Workflow Builder Tool.



• The Demo node is identified on the workflow canvas area with an orange **Demo** label across the node icon as in the following illustration:

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Managing Demo Nodes

Once the 30-day trial ends, the following will occur:

- The Demo label text will change from "Demo" to "Expired."
- · The Demo label will turn red.
- The workflow will stop running and will not be able to start again until the required nodes are fully licensed.

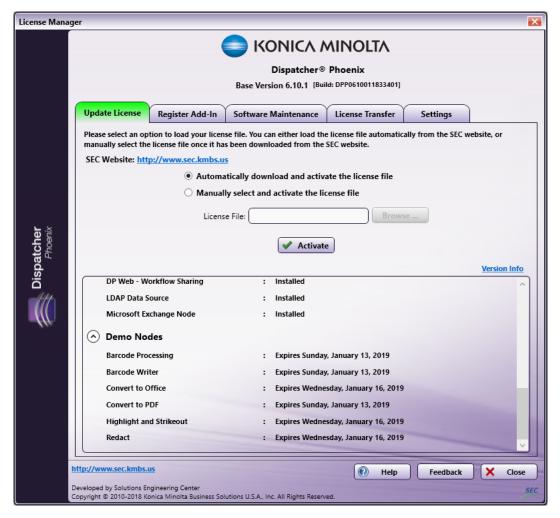
Note: Expired demo nodes will still be available for use from your node palette. The functionality of the node will update when updates are released to allow you to preview the settings. However, you will be unable to use the node in an active workflow once your trial license has expired.

Viewing Demo Node Expiration Dates

You can monitor the expiration dates of your trial licenses via the License Manager. Do the following:

- 1. Navigate to the Help drop down in the upper right corner of the Dispatcher Phoenix client application. Select License Manager.
- 2. On the Update License or Register Add-In tab, use the scroll bar on the right side of the window to navigate to Demo Nodes

All currently installed demo nodes with their expiration dates will be listed, as in the following illustration:

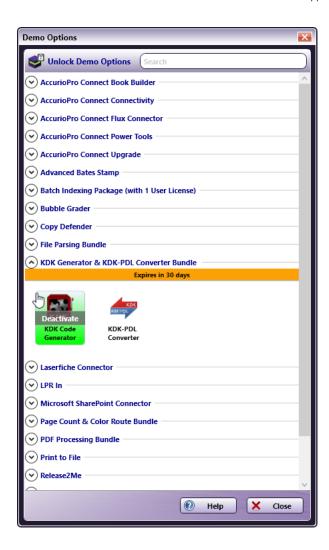


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Deactivating a Demo Node License

To remove a demo node from the **Demo Options** node palette:

- 1. Select the Click here to unlock demo options button.
- 2. Find the desired demo node & mouse over the icon. Click **Deactivate**. Alternatively, right-click on the demo node within the node palette and select **Deactivate & Remove**. A confirmation window will then appear. To cancel the deactivation, select **Cancel**.



3. Upon confirmation, a **User Account Control** window may appear asking for permission for Add-In Manager to make changes to your system. Select **Yes**. The Add-In Manager will launch to automatically deactivate and uninstall the selected demo node.

To remove a bundle of nodes from the **Demo Options** node palette:

- 1. Select the Menu arrow next to Demo Options.
- 2. Navigate to **Sort By**, then **Type with separator**.
- 3. Click the **X** in the upper right corner next to the bundle name. A confirmation window will then appear. To cancel the deactivation, select **Cancel**.
- 4. Upon confirmation, a **User Account Control** window may appear asking for permission for Add-In Manager to make changes to your system. Select **Yes**. The Add-In Manager will launch to automatically deactivate and uninstall the selected bundle.

Converting a Demo Node License

To convert a demo node to a fully licensed feature, you will need to purchase the appropriate Dispatcher Phoenix node bundle; then register the add-in module. See the **Register Add-In** section for more information.

Once a Demo license has been converted to a fully licensed feature, the purchased node(s) will move from the Demo node palette to the appropriate Collect, Process, or Distribute folder.

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Release2Me System Workflow

The **Release2Me System Workflow** provides you with an easy-to-use, simple way to hold print jobs in a queue for release at an MFP by an authenticated user.

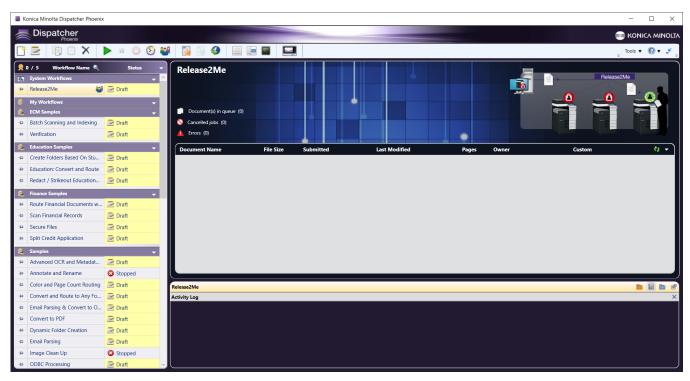
Dispatcher Phoenix will automatically install the Dispatcher Phoenix Release2Me printer, which uses the Dispatcher Phoenix Printer Driver. You should use the Release2Me printer from other Windows applications to print directly to this Release2Me System Workflow. If you want to use another printer, you must change the LPR queue name to match the LPR queue name of the other printer. You can edit the LPR queue name in the LPR Queue Name field from the Release2Me System Workflow configuration window.

Release2Me also comes with print reporting and print delegation features to help monitor printer usage and secure printouts.

Note: Accessing the Release2Me feature is only supported on MFPs running a Graphical User Interface.

Getting Started

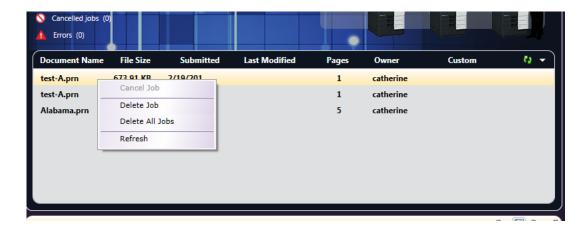
After installing the Release2Me package, a shared, system-defined workflow for **Release2Me** will automatically be installed and appear under a newly created folder called "System Workflows" in the Workflow List of the Dispatcher Phoenix main application screen, as in the following illustration:



In the Workflow Preview area, an interactive panel for Release2Me will appear. On this panel, you can do the following:

- View how many documents are currently in queue. The print jobs are listed and the number of print jobs in queue is displayed next to the "Document(s) in queue" text.
- Select the Cancelled jobs link to view/access the print jobs that have been canceled and sent to an Output Folder.
- Select the Errors link to view/access print jobs that have gone out on error and sent to an Output Folder.
- Cancel or delete print jobs listed in the queue by right-clicking on the print job and choosing from the menu that appears, as in the following illustration:

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- Choose the Cancel Job option to cancel that specific print job. The file will go out on the No transition.
- Choose the **Delete Job** option to permanently delete that specific print job.
- Choose the **Delete All Jobs** option to permanently delete all existing print jobs held in the Print Queue.
- Choose the **Refresh** button to refresh the contents of the print queue list. You can also refresh the print queue by selecting the **Refresh** button on the upper right hand side, as in the following illustration:



• View the Activity Log of the system workflow. The Activity Log appears by default; however, you can also view Inputs and Outputs in that area using the folder icons on the right-hand side of the Activity Panel.

Note: Unlike other Dispatcher Phoenix workflows, LiveFlo animations are not available in the Release2Me's Workflow Preview area.

Using the System Workflows Folder

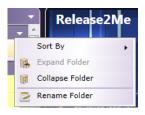
The System Workflows folder in the Workflow List differs from other folders in the Workflow List. Some of the capabilities available for other folders are not enabled for System Workflows, including:

- · Export the folder
- · Copy/Paste workflows in the folder
- · Delete the folder
- Launching of the Workflow Builder tool
- Shifting workflows to and from this folder
- Creating a new workflow in this folder
- Deleting the folder

Click on the down arrow in the System Workflows menu to do the following:

- $\bullet\,$ Sort workflows within the folder by Name or Status.
- Expand or collapse the folder.
- Rename the folder.

See the following illustration:



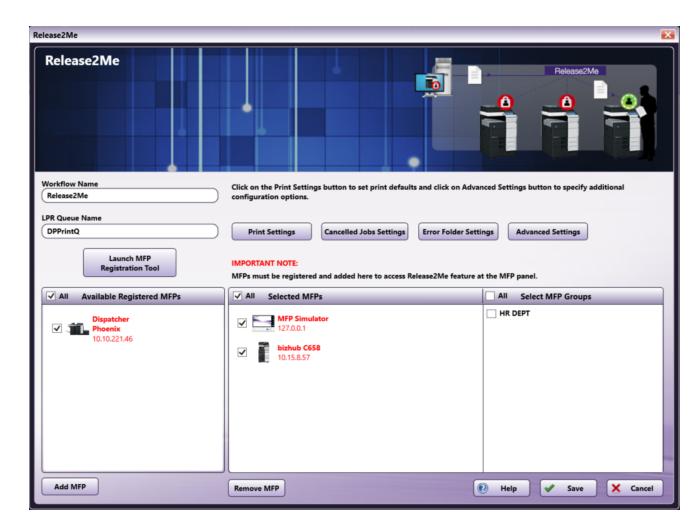
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Note: The System Workflows folder will always appear on top of the Workflow List, as the first folder listed.

Configuring for Release2Me

To start using the Release2Me feature on your MFPs, do the following:

- 1. Edit the Release2Me workflow by either double-clicking on the workflow in the System Workflows folder or by selecting it and clicking on the **Edit** icon.
- 2. The Release2Me System Editor will appear, as in the following illustration:



3. The Available Registered MFPs area will display all of the MFP devices that have been registered for use with Release2Me and other workflows. You can access the MFP Registration tool directly from the Release2Me node by clicking on the **Launch MFP Registration Tool** button.

Move the MFP icon(s) from the Available Registered MFPs area to the Selected MFPs box by doing one of the following:

- Drag-drop the MFP icons.
- Check the boxes next to one or more MFP icons; then select the **Add MFP** button.
- Check the All box to select all MFPs listed; then select the Add MFP button.
- 4. Select the **Save** button to save your changes.

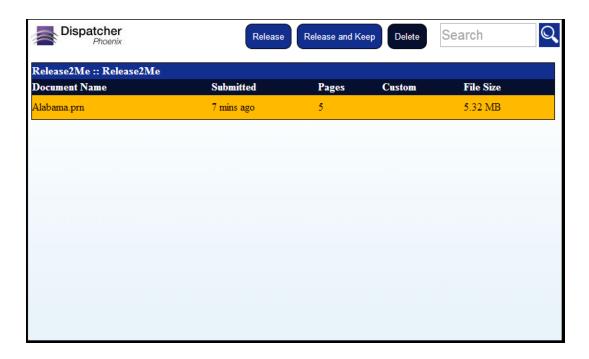
Running Release2Me

Once your system defined workflow has been configured with the correct MFPs, you can start using Release2Me functionality with your print jobs. Do the following:

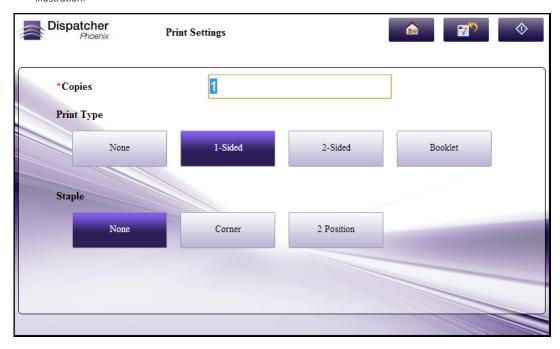
- 1. Ensure that the Release2Me workflow is running.
- 2. Print a document using the Dispatcher Phoenix Release2Me Printer that is installed as part of the Release2Me solution.
- ${\it 3. The print job will appear listed in the Release 2 Me panel in the Dispatcher Phoenix main application.}\\$

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4. Authenticate at the MFP to access your Release2Me queue, which resembles the following illustration:



- 5. Select the **Release** button to print the file and remove it from the Release2Me queue.
- 6. Select the **Release and Keep** button to print the file but keep a duplicate copy of it in the Release2Me queue for future use. This means that the file will stay in the Release2Me queue until it has either been released or deleted at a later date.
- 7. Select the **Delete** button to remove the file from the Release2Me queue without printing it.
- 8. You can also use the **Search** field with type ahead functionality to filter the list of print jobs that are displayed. Begin typing characters into the Search field and the list of print jobs will be automatically and instantly filtered based on what you entered.
- 9. Once you **Release** or **Release and Keep** a print job, you can specify print preferences for the job, using a screen that resembles the following illustration:



Note: The print preferences fields that appear are customizable.

Configuring Release2Me Options - Print Settings

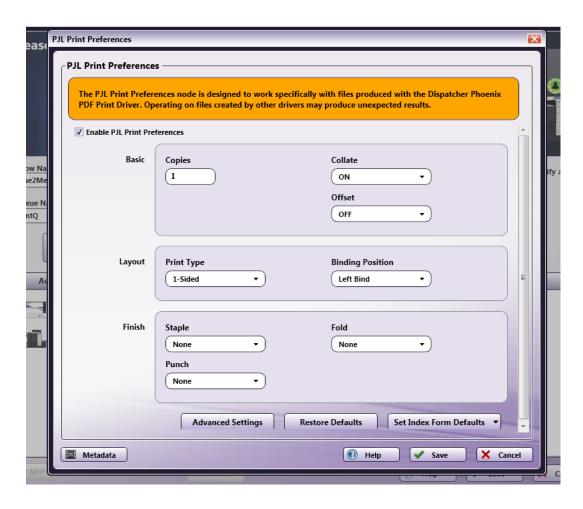
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By default, the system-defined workflow applies default print preferences to your print job, which can be customized at the panel after a job is released. You can disable this feature, customize the default print settings, customize the print settings fields that appear on the panel, and specify additional PJL headers.

Important! These settings are designed to work with the Dispatcher Phoenix Print Driver. Support for other drives will vary. Settings specified here will not necessarily override PS and PCL files.

Do the following:

- 1. Double-click on the Release2Me workflow to open it in the System Editor.
- 2. Select the **Print Settings** button. The following pop-up screen appears:

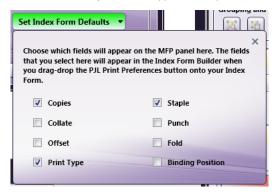


- 3. To prevent this form from appearing on the panel, uncheck the **Enable PJL Print Preferences** box. With this box disabled, the default print preferences will be applied to each released print job, and users will not be able to modify those default settings at the panel.
- 4. With PJL Print Preferences enabled, you can specify default settings for the following **Basic** settings:
 - Copies Enter the number of copies to print.
 - Collate Choose ON, OFF, or None to keep existing settings in incoming documents.
 - Offset Choose ON, OFF, or None to keep existing settings in incoming documents.
- 5. With PJL Print Preferences enabled, you can specify default settings for the following **Layout** printing preferences:
 - **Print Type** Choose 1-Sided, 2-Sided, Booklet, or None to keep existing settings in incoming documents.
 - Binding Position Choose Left Bind, Right Bind, Top Bind, or None to keep existing settings in incoming documents.
- 6. With PJL Print Preferences enabled, you can specify default settings for the following Finish printing preferences:
 - Staple Choose Corner, 2 Position, or None to keep existing settings in incoming documents.
 - Fold Choose Center Fold or None to keep existing settings in incoming documents.
 - Punch Choose 2 Hole, 3 Hole, or None to keep existing settings in incoming documents.

Note the following:

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- Booklet overrides Collate, Staple, and Punch settings. With the Booklet Layout, Staple and Punch are set to Off and Collate is set to On.
- Fold overrides Staple, Punch, Collate, and Offset settings. With the Fold Finish, Collate is set to On, Offset is set to Off, and Staple and Punch are set to Off.
- Staple overrides Offset. With the Staple Finish, Offset is set to Off.
- 1. To add custom PJL headers to incoming documents, select the Advanced Settings button.
- 2. To restore the PJL Print settings to their default values, select the Restore Defaults button.
- 3. By default, a screen will appear with the Copies, Print Type, and Staple fields after a print job has been released; however, you can customize the fields that appear at the panel by selecting the **Set Index Forms Defaults** button. A drop-down palette will appear, which allows you to choose the fields that you want to appear at the panel after a print job has been released. See the following illustration:



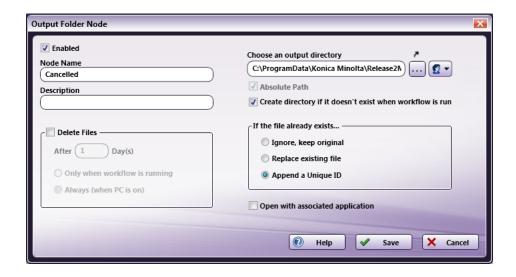
Note: If you choose three fields (or less), they will be displayed as buttons on the Index Form; however, if you choose more than three fields, they will be displayed in drop-down list format.

Configuring Release2Me Options - Cancelled Job Settings

You can configure settings for cancelled print jobs. Do the following:

- 1. Double-click on the Release2Me workflow to open it in the System Editor.
- 2. Select Cancelled Job Settings.

An Output Folder Node will open, as shown in the following illustration:



The box for **Absolute Path** is enabled by default and cannot be disabled. The output folder has to be an absolute path or else the files will be lost. If the error folder is configured, cancelled jobs will be sent to the error folder instead.

For more details on how to configure this node, please see the **Output Folder Node** page.

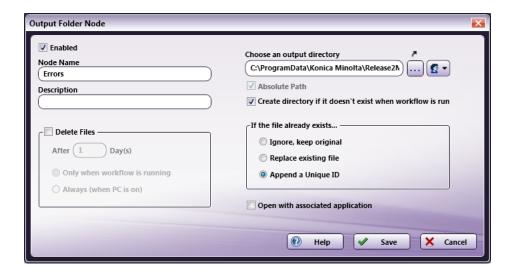
Configuring Release2Me Options - Error Folder Settings

You can configure settings for error print jobs. Do the following:

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- 1. Double-click on the Release2Me workflow to open it in the System Editor.
- 2. Select Error Folder Settings.

An Output Folder Node will open, as shown in the following illustration:



The box for Absolute Path is enabled by default and cannot be disabled. The output folder has to be an absolute path or else the files will be lost.

For more details on how to configure this node, please see the **Output Folder Node** page.

Configuring Release2Me Options - Advanced Settings

You can configure the following advanced settings:

- Whether or not Dispatcher Phoenix should delete unclaimed jobs in the queue automatically, and the number of days after which print jobs will be deleted from the queue.
- Additional information about each print job to be displayed in the Print Queue.

Do the following:

- 1. Double-click on the Release2Me workflow to open it in the System Editor.
- 2. Select the **Advanced Settings** button. The following pop-up screen appears:

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- 3. To have Dispatcher Phoenix automatically delete unclaimed jobs in the queue, check the **Delete Unclaimed Jobs** box; then enter the number of days after which your print jobs will be deleted form the queue.
- 4. By default, the Release2Me queue displays the file name, submitted date, total number of pages, and file size of each print job. You can add additional information about the print job using metadata. Do the following:
 - a. Click on the ${\bf Browse}$ for ${\bf metadata}$ button next to the ${\bf Custom}$ ${\bf Column}$ field.
 - b. The Metadata Browser window will appear. Find and select the metadata that you are interested in; then drag it over to the **Custom Column** field. You can add multiple metadata variables to this field.
- 5. Select the **Save** button to keep your changes.

Specifying Additional PJL Headers

You can also use this node to do the following:

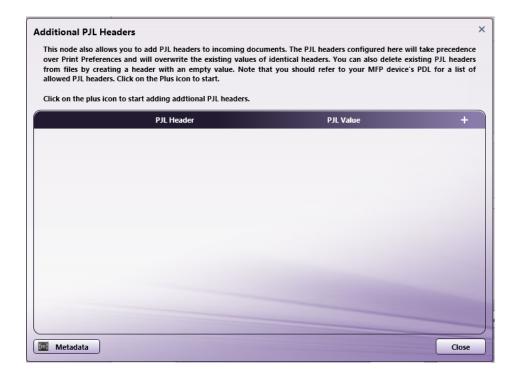
- Add additional PJL headers to incoming documents.
- Modify the values of existing PJL headers in incoming documents.
- Delete existing PJL headers from incoming documents.

Important! Adding custom PJL headers may cause the document to print incorrectly. Make sure you know which PJL headers are suitable for the specific device you are printing to.

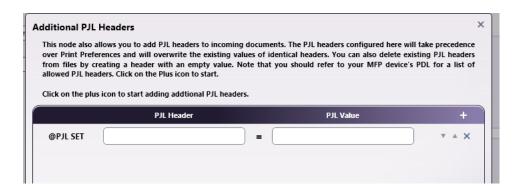
Do the following:

1. To get started, select the **Advanced Settings** button. The following palette will appear:

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2. Click on the + button. An empty row will appear, as in the following illustration:



- 3. Enter the name of the PJL Header next to the @PJL SET label and its corresponding value after the = sign.
- 4. Continue adding rows as necessary.
- 5. To delete a row, click the **X** button.
- 6. To move a row up or down in the list, click the **arrow** buttons.
- 7. If you create a PJL Header row with an empty value, that specific PJL Header in incoming documents will be removed.

Any value specified here will overwrite existing values for the same PJL Header in incoming documents.

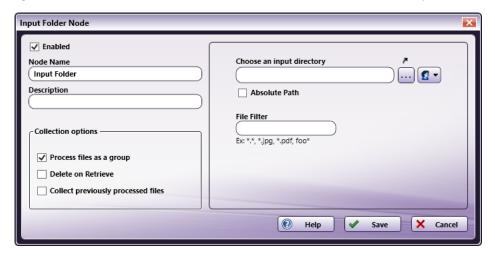
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Collection Nodes

Input Folder



Double-click on the Collect node (in this example: a folder) to open the *Input Folder - Node Properties* window. Use the Properties panel on the right side of the screen to define how the node looks in the workflow, and use the Node Properties window for the actual Input Folder definition.



On the Input Folder Node window, do the following:

- Make sure the Enabled box is checked to enable one or more collection points when there are multiple input sources (not needed on a single input source).
- In the **Node Name** field, enter a meaningful name for the Input Folder node.
- In the **Description** field, enter a description of the node. This is not required, but can be helpful with multiple collection points. If the description is long, you can hover the mouse over the field to read its entire contents.
- · Specify the following collection options:
 - **Process files as a group.** Check the **Process files as a group** box to have the application collect all files at once, before processing any of them. If left unmarked, each file will be collected, processed, and distributed individually.

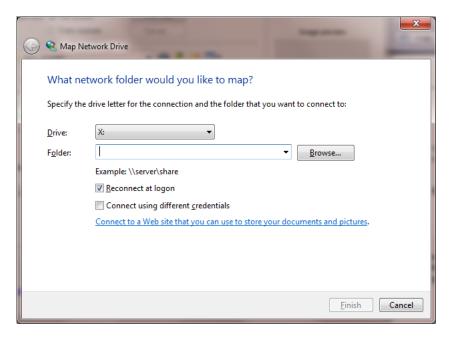
Note:

- **Delete on Retrieve.** Check the box to **Delete** the files retrieved. If they are not deleted, they will be processed again the next time the workflow is run using the same input source.
- **Collect previously processed files.** Check the **Collect previously processed files** box to allow documents to be collected every time the workflow executes. When this box is not checked, files will be processed once.
- In the **Choose an Input** directory field, click on the *ellipsis* button (....) to browse to and select an input location. Once a location is in the field, use the curved arrow to open an Explorer window. When specifying an input location, you can use **date, file system, and user dynamic variables**.

Notes:

When collecting from a new mapped network drive, make sure that the Reconnect at Logon box is checked when you specify the network
drive on the Map Network Drive window. When adding a new folder to an existing mapped network drive, you must disconnect from the mapped
network first (by right-clicking on the drive and selecting the Disconnect option) before reconnecting on the Map Network Drive window. At this
point, you may need to enter your network credentials again.

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• When creating an Input Folder that points to a network directory, you will need to enter network credentials. Select the **Network Credentials** button () to the right of the **ellipsis** button to access the Network Credentials window; on this window, you can select your username and enter the appropriate password.

Important! Dispatcher Phoenix only supports CIFS and SMB network shares.

- To make sure that the input location entered never changes per user, check the **Absolute Path** box. This option disables any kind of
 substitutions performed on the location. The default setting (unchecked) is to allow for replacing the path with predetermined file system
 variables.
- In the **File Filter** field, enter a file extension to define the file types to collect. (Leave this field blank to collect all files). Using the filter prevents a process node from trying to process the wrong type of file. For example, if you are using a Merge function, which only works with images (.jpg, .png, etc.), you could use the filter to prevent the application from trying to merge a Word document (.doc).
- For both single collection and group collection, the order in which the node collects files is not guaranteed to be sorted. Collection order depends on the file system and how it stores directory entries.

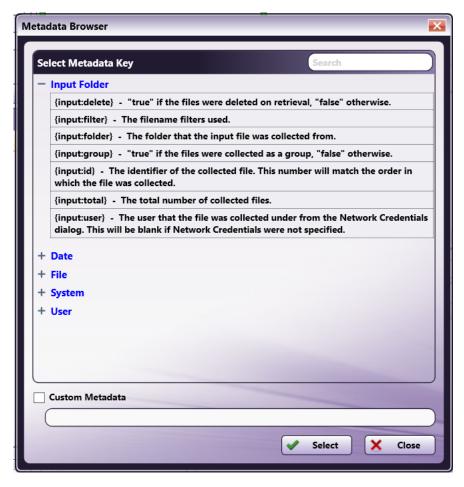
Buttons

- **Help** To access Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node configuration and exit the window, click this button.

Metadata Key Selection

When the Metadata Browser is open on any node, the following metadata keys can be exported by the Input Folder node onto each file:

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- {input:total}-The total number of collected files.
- {input:id}-The identifier of the collected file. This number will correspond to the order in which the files were collected.
- $\{input:folder\}$ -The folder path the files were collected from.
- {input:user}-The user that collected the files.
- {input:filter}-The filter applied to the filenames.
- {input:group}-"true" if files are being processed as a group, "false" otherwise.
- {input:delete}-"true" if files are being deleted on retrieval, "false" otherwise



Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix input folders. Dispatcher Phoenix uses SMB/CIFS protocols to access Windows directories. By default, SMB/CIFS requires a number of different ports depending on operating system and network requirements. If the connection fails, check the workflow log for the following message:

"Failed to access directory: '\\server\share\path\to\file' "

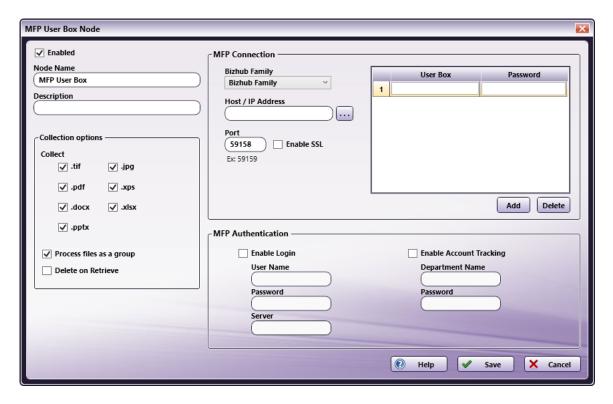
To allow Windows directories to be accessed properly, please consult your firewall application documentation to allow access by the workflow engine process, "blox-erl.exe."

Konica Minolta® MFP User Box



If you are using a User Box on a network multi-function printer (MFP) as your Input source, the node window will be different than that of a folder. Double-click on an MFP User Box Collect node to open the **MFP User Box Node** window, as in the following illustration:

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- Make sure the Enabled box is checked to use this location as an input source. This will also allow you to enable one or more Collection Points
 when there are multiple input sources. When unchecked, this input will be ignored; documents will not be collected from this node location.
- In the Node Name field, enter a meaningful name for the "Collect from" MFP User Box node.
- In the **Description** field, enter a description of the MFP User Box node. This is not required but it can make the node easier to recognize if there are multiples. If the description is long, you can hover the mouse over the field to read its entire contents.
- Specify the following collection options:
 - Collect. You can choose to collect TIFF, JPG, XPS, or PDF files. Remove the check from the box if you do not want to collect a particular type of image file.
 - Process all files as a group. Check the Process all files as a group box to have the application collect all files at one time, before
 processing any of them.
 - **Delete on Retrieve.** Check the **Delete on Retrieve** box to delete the files that have been collected. If they are not deleted, they will be processed again the next time the workflow is run using the same input.

Note: When scanning a multi-page document as a JPG, all pages will be collected as individual files and renamed. For example, when scanning a 10-page document, the names of the JPG files would be as follows: Filename_1_of_10.jpg, Filename_2_of_10.jpg...Filename_10_of_10.jpg.

- Define how to access the MFP in the **MFP Connection** section:
 - **Bizhub Family**. The most common family is Bizhub, but you may select another from the drop- down list of family types, depending on the MFP you are using. Choices include:

bizhub family - C754, C654, C364, C284, C224,C220, C280, C35, C360, C451, C452, C550, C552, C650, C652, 160, 181, 223,25,283, 361, 363, 421, 423, 501, 552, 601, 652, 751, 42/36, etc.

bizhub PRESS - C6000, C7000, C8000, etc.

Note: Only JPG files can be collected from bizhub PRESS machines.

bizhub PRO - 1051, 1200, 950, C5501, C6000L, C6501, etc.

Note: Only TIFF files can be collected from bizhub PRO machines.

bizhub family: C350, bizhub family: 200, bizhub family 250, and bizhub family: 350 - These Konica Minolta models must be selected from the menu for specific configuration. They also must have phase 2.5 firmware installed for them to work with the application.

legacy secured - These machines scan into boxes which may or may not require a password: Bizhub Pro 920, Bizhub Pro 1050, Konica 7145 (late firmware release).

legacy standard - These Konica machines generally scan into boxes that have no passwords: Konica 7020, 7022, 7025, 7030, 7033, 7040, 7045, 7075, 7085, 7130, 7135, 7145*, 7165, 7155, 7222, 7228, 7235, 7255, 7272.

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- Host/IP Address. Enter either a valid host name (i.e., mysubdomain.domain.com) or numeric IP address (i.e., 10.10.220.110) to be used for Collection or click the *ellipsis* button (....) to open the MFP Explorer tool to discover MFP devices on the network. The MFP Explorer will search the currently configured network for any MFP devices and then, once a device is selected, auto-populate the fields on the MFP User Box node properties window with the correct information; in this case, any existing settings on the MFP User Box node window will be overridden.
- **User Box/Password.** Enter the user box number or name (and password, if appropriate) in this area; select the **Add** button if you need to add additional user boxes.
- Port. This defaults to the typical port number for KMBS MFPs.
- Enable SSL. Uncheck this box only if SSL is not enabled on the MFP.
- MFP Authentication. If User Authentication and/or Account Tracking are enabled, additional details are required for MFP access.



- **Enable Login**. Enter an authorized **User Name** and **Password**. If the MFP is configured to connect to an external server for authentication, MFP User Box collection can be configured for the same server as well by entering the appropriate name in the **Server** field. The MFP Explorer tool will automatically detect any servers available and present you with a list to choose from.
- Enable Account Tracking. If Account Tracking is on and synchronization is not enabled, enter the appropriate Department Name and Password.

Important! On a Konica Minolta MFP panel, an authorized Administrator can login and turn on both *User Authentication* and *Account Tracking*, and enable synchronization. Synchronizing Users to Accounts allows them access via **one** login. If not synchronized, a user has to log in twice to use the MFP (as listed above under **MFP Authentication**). If synchronization is enabled, a login must be associated with an account **at the MFP panel** before remote logins are allowed. The steps at the MFP panel are:

- 1. Press Utility/Counter.
- 2. Select Administrator Settings.
- 3. Login with the Administrator password.
- 4. Select User Authentication/Account Track.
- 5. Select *General Settings*.
- 6. Set *User Authentication* to "ON (MFP)."
- 7. Set Account Tracking to "ON."
- 8. Set Synchronize User Authentication & Account Track to "Synchronize."

To require users to enter both login and account, follow the steps above, but turn 'Synchronize User Authentication & Account Track' to 'Do Not Synchronize.'

• When finished defining your MFP User Box Collection Point, select the Save button. You can also select the Help button to access online help about the node, and select the Cancel button to exit the window without saving any changes.

MFP Explorer

To make MFP setup easier and more accurate, **Dispatcher Phoenix** includes an MFP Explorer tool. To open the MFP Explorer, click on the **ellipsis** (....) button located next to the **Host / IP Address** field. When launched, the MFP Explorer will search the currently configured network for any MFP devices. All results are displayed in the window, as in the following illustration:

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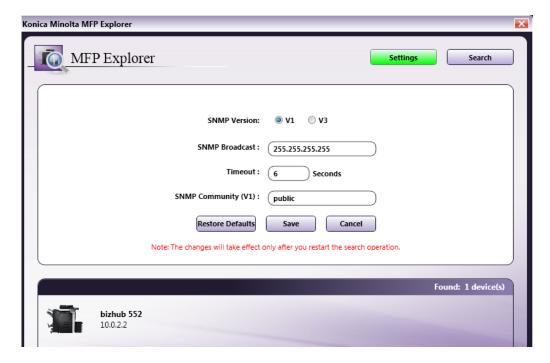


• To display details, click on an MFP device and details will display in a new pane on the window, as in the following illustration:



• To **change the settings** for the current network being searched, select the **Settings** button at the top of the window, as in the following illustration:

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The SNMP Broadcast tells the MFP Explorer on which network subnet to search for MFP devices. By default, this is set to 255.255.255.255 which will search on any and all accessible subnets. You may enter a more specific subnet to narrow the search.

The SNMP Community is similar to a passphrase given to each MFP. By default, Konica Minolta MFP devices have this phrase set to "public." If the MFP devices on your network have had this value changed, you may enter that passphrase here.

The Timeout may be set limit the amount of time the MFP Explorer will spend discovering MFPs on the network. If there are a small number of MFPs on your network, this number should be left low. However, if there are a large number of MFPs, it is recommended that this number be increased. By default, the Timeout is set at 6 seconds with a maximum value of 300 seconds (5 minutes).

Once the desired MFP device is found, click it to highlight it, then select the Select button at the bottom of the window. The selected MFP device information will populate the MFP User Box node properties panel automatically.

Note: Not all discovered MFP devices are compatible with Dispatcher Phoenix. For devices that are not fully compatible, only some information will be displayed on the node properties panel. In the event that there was already information entered on the form, that data will be cleared prior to the new partial MFP device information being displayed.



Firewall Note: Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix MFP User

Box nodes. In Version 1 and Version 2, the default is port 59159 and SSL is enabled. In Version 3, the default is port 59158 and SSL is not enabled. The port number is configurable, so it may differ if the number has been changed. If file collection fails, check the workflow log for a message similar to the following:

" Failed to connect to mfp.com:59159 (SSL:yes, type:16) "

To allow MFP User Box collection to function properly, please consult your firewall application documentation to either stop blocking port 59158 / 59159 or to allow access by the workflow engine process, "blox-erl.exe."

Upland InterFAX In

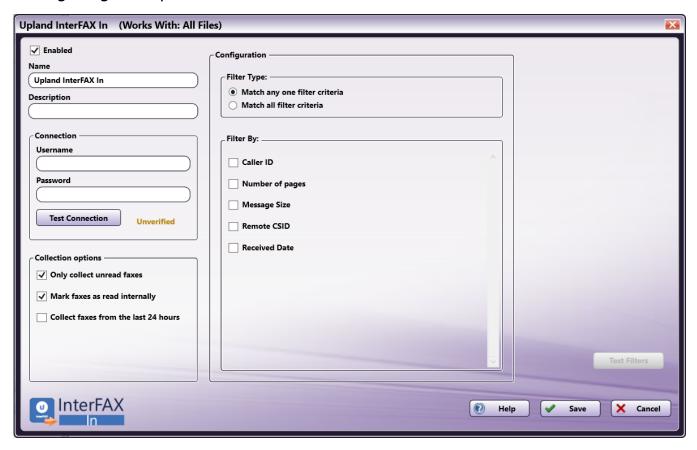


The **Upland InterFAX In** node is designed to allow new and existing Dispatcher Phoenix workflows to collect files from Upland's web-based InterFAX system.

Important! For more information about limitations of the Upland InterFAX service, see the Upland InterFAX documentation.

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Configuring the Upland InterFAX In Node



- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions. By default, nodes are enabled upon creation.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node definition and exit the window, click this button.

Application Setup

To open the **Upland InterFAX In** node configuration window, add a collection node for InterFAX, then double-click on it.

Connecting to Upland InterFAX

To connect to Upland InterFAX, do the following:

- 1. Enter the **Username** and **Password** for the Upland InterFAX.
- 2. Select **Test Connection** button. If the connection is successful, a confirmation message will appear, as in the following illustration:

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Collection Options

In the ${\bf Collection\ option}$ section, you have the following options:

- Only collect unread faxes This setting prevents the Upland InterFAX In node from collecting faxes that have been marked as read. When combined with the "Mark faxes as read internally" option, this prevents the node from processing the same fax more than once. By default, this option is selected.
- Mark faxes as read internally This setting marks any faxes that it collects as "read" internally. When combined with the "Only collect unread faxes" option, this prevents the node from processing the same fax more than once. By default, this option is selected.

Important! The "read" status is tracked separately in the InterFAX client and Dispatcher Phoenix. Selecting this option will update the status in the Dispatcher Phoenix, but faxes will still appear as "unread" within InterFAX.

• Collect faxes from the last 24 hours - This option extends the collection to any specified faxes from the previous 24 hours. This option is designed to help new workflows begin processing faxes.

Important! If both the "Only collect unread faxes" and "Mark faxes as read internally" options are unchecked, faxes will remain in your Upland InterFAX system and be reprocessed every time the node attempts to run. This can lead to slow processing.

Configuration

The Upland InterFAX In node has a number of configuration options.

Filter Type:

The Upland InterFAX In node supports using multiple filters together. Options include:

- Match any one filter criteria Selecting this option will allow the node to collect any fax that matches at least one of the specified criteria. By default, this option is selected.
- Match all filter criteria Selecting this option will limit the node to only collecting faxes that match all of the specified criteria.

Filter Area

The Filters area provides additional means by which you can limit the faxes that the node processes, described below. Faxes collected into a Dispatcher Phoenix workflow with the Upland InterFAX In node can be filtered by the following fields:

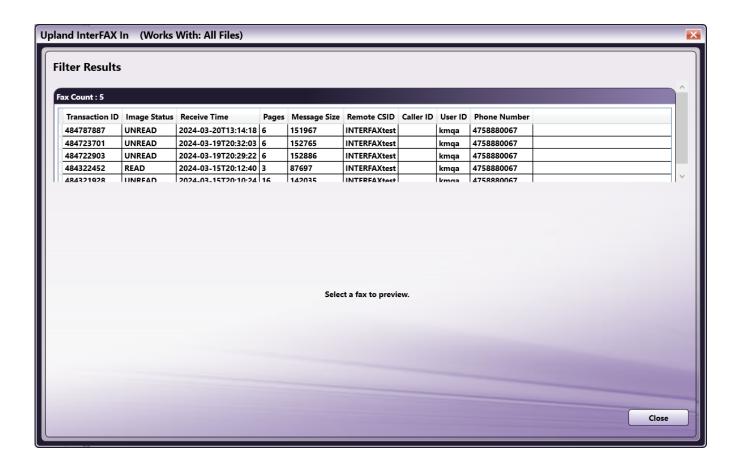
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Field	Description	Filter Type
Caller ID	The caller ID of sender.	Matches Does not match Contains Does not contain Starts with Ends with Regular expression Match Case
Number of pages	The number of pages in the fax.	Equal to Not equal to Greater than Less than Greater than or equal to Less than or equal to Less than or equal to In between
Message size	The total file size of the fax.	Equal to Not equal to Greater than Less than Greater than or equal to Less than or equal to In between Note: Message size can be measured in Bytes, KB, or MB.
Remote CSID	The Remote CSID of sender.	Matches Does not match Contains Does not contain Starts with Ends with Regular expression Match Case
Received date	The date the fax was received.	Newer than Older than In between Equal to Not equal to

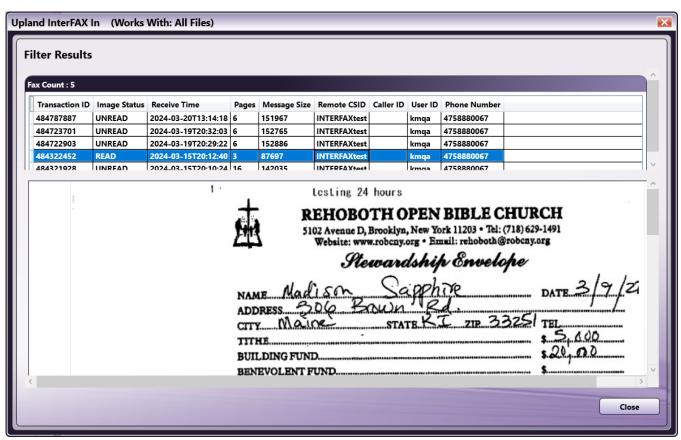
Test Filters

You can test your configured filters by selecting the **Test Filters** button. This will open a window with the top 25 results from those filters:

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You can select one of the available faxes to see a preview:



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Note: When using the filter testing feature, the Upland InterFAX In node will only display the first 25 items. There is no restriction on filters while the workflow is running.

Metadata

The following metadata is created in the Upland InterFAX In node:

Metadata Value	Description
{uplandinterfaxin:callerid}	The caller ID of the sender.
{uplandinterfaxin:getonlyunread}	"true" if only unread faxes were retrieved from server, "false" otherwise.
{uplandinterfaxin:imagestatus}	Indicates the status of the fax image, possible values are "UNREAD", "READ" and "DONT_EXIST".
{uplandinterfaxin:markasread}	"true" if the files were marked as already 'read' on retrieval, "false" otherwise.
{uplandinterfaxin:messagesize}	The size of the inbound fax image (in bytes).
{uplandinterfaxin:pages}	The number of pages received in this fax.
{uplandinterfaxin:phonenumber}	The phone number at which this fax was received.
{uplandinterfaxin:receivetime}	The date and time that the fax was received (formatted as yyyy-MM-ddThh:mm:ss). Times listed are GMT.
{uplandinterfaxin:remotecsid}	The CSID of the sender of the fax.
{uplandinterfaxin:transactionid}	The internal ID assigned for this fax transaction.
{uplandinterfaxin:userid}	The username that received this fax transaction.

Konica Minolta® MFP Panel Node



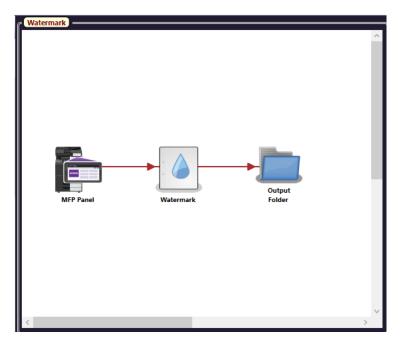
Dispatcher Phoenix can take advantage of Konica Minolta MFP devices which run bizhub Extended Solution Technology (bEST). The *MFP Panel* node allows you to submit documents directly into a workflow with preconfigured scan settings. Since the node is accessed from the device panel, the workflow runs immediately with no scheduling. The workflow must, however, be running in order to be accessible to the *MFP Panel* node.

Note: The MFP must have the WebDAV Client enabled in order to transmit documents to Dispatcher Phoenix.

Metadata included when scanning can be used in other nodes, such as the Output Folder node and the Email Out node.

Note: When the system is under heavy load, performance of external services may be impacted. As such, we recommend that heavy processing be done on a faster system with multiple cores.

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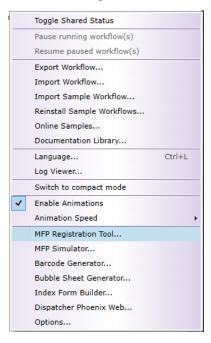
This node will not work if the Image Log Transfer setting is enabled on the MFP. To disable this setting, do the following on the device control panel:

- 1. Select **Utility**.
- 2. Select Administrator Settings.
- 3. Select Security Settings.
- 4. Make sure Image Log Transfer Settings is OFF.
- 5. Click **OK** when done.

MFP Registration

Before they can be used by a *MFP Panel* node, MFP devices must be registered through **Dispatcher Phoenix** so that the application recognizes the MFPs from which it can receive input. To launch the **MFP Registration Tool**, do one of the following:

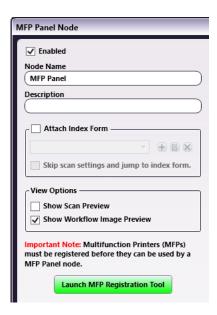
• Select MFP Registration Tool... from the Tools pull-down menu of the main application screen,



or

• Select the Launch MFP Registration Tool button from the MFP Panel node properties window.

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When Your IP Address Changes...

If your IP address changes after **Dispatcher Phoenix** installation, you must update the IP address before you can connect to Dispatcher Phoenix. To update, take the following steps:

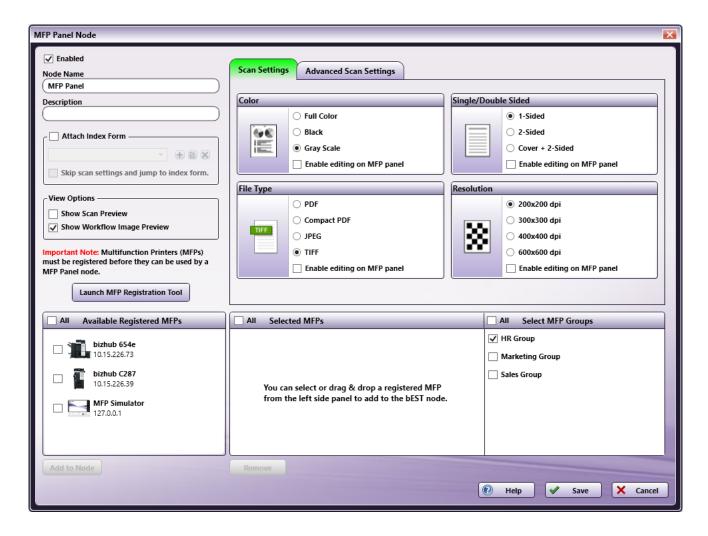
- 1. Open Dispatcher Phoenix Web and sign in with Administrator privileges.
- 2. Click on the **Devices tile**.
- 3. Click on the **Defaults button**.
- 4. Click the **Refresh** button next to the bEST Server Host Name / IP Address field.
- 5. Click **Save** to preserve your changes.

Note: Any changes made on the **Defaults** window are saved but not applied to or validated against any device until the device is either registered for the first time or unregistered and then registered again.

MFP Panel Node Setup

Once the MFP has been registered, you can use it with a *MFP Panel* node in **Dispatcher Phoenix**.

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- Make sure the **Enabled** box is checked to use this location as an input source. When unchecked, this input will be ignored; documents will not be collected from this node location.
- In the Node Name field, enter a name for the MFP Panel node.
- In the **Description** field, enter a description for the **MFP Panel** node. This is not required, but it can make the node easier to recognize when there are multiples. If the description is long, you can hover the mouse over the field to read its entire contents.
- To add an index form to the workflow, check the Attach Index Form box.
- If you would like to go directly to the Index Form when accessing your workflow at the device panel, check the Skip scan settings and jump to
 index form box.

With this setting enabled, you will not be able to modify any scan settings at the device panel; instead, you will go directly to the Index Form once you tap on the **Dispatcher Phoenix app** button (if the workflow is the only one running) or tap on the workflow in the **Workflow List screen** (if multiple workflows are running).

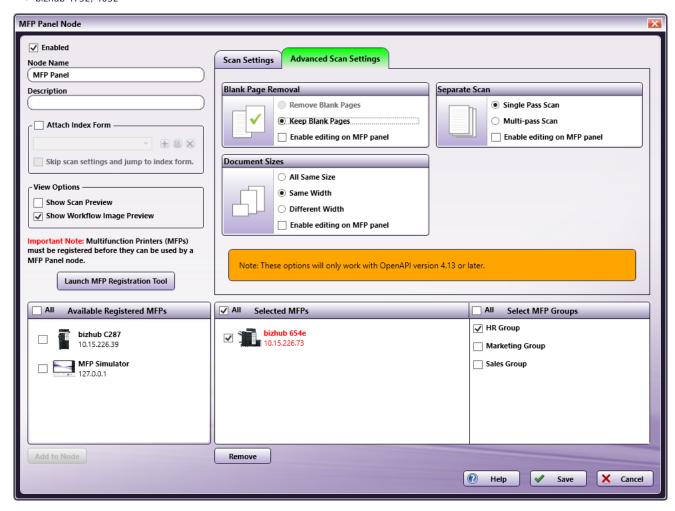
- In the View Options area, check the box for Show Scan Preview to view a preview of your scanned document at the MFP. Check the box for Show Workflow Image Preview to view a preview of your workflow image at the MFP.
- On the **Scan Settings** tab, predefine the settings for the MFP to use when scanning a document. These settings mirror those available to the user at the MFP. Not all scanning options are supported on all MFP devices. In these cases, such as color settings on a black and white MFP, the user settings here will be ignored.
- On the Advanced Scan Settings tab, you can select advanced settings for the MFP to use when scanning a document. Options are:
 - Blank Page Removal Choose whether to remove or keep blank pages.
 - Separate Scan Choose whether to scan as single pass or multi-pass.
 - Document Sizes Choose whether the documents being scanned will be the same size or different sizes.

Important! The additional scan functionality available via **Advanced Scan Settings** is only supported on devices with OpenAPI version 4.13 or higher as listed below:

bizhub C287, C227

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- bizhub 367, 287, 227
- bizhub C368, C308, C258
- bizhub 958, 808
- bizhub C658, C558, C458
- bizhub 558, 458, 368, 308
- bizhub 658e, 558e, 458e, 368e, 308e
- bizhub C759, C659
- bizhub C3851FS, C3851, C3351
- bizhub 4752, 4052



• To edit Scan Settings or Advanced Scan Settings at the device panel, check the **Enable editing on MFP panel** check box associated with the Scan Setting that you are interested in. If you do not enable this option, the Scan Setting will not be editable on the MFP.

Note: With the native interface, simplex/duplex options cannot be controlled from the MFP Panel node window. For example, if you would like to scan 2-sided, you must specify that setting on the device control panel, not on the MFP Panel node window. Simplex/duplex options can be changed on the control panel even if the Enable editing on MFP panel option is disabled.

- Available Registered MFPs This area contains all of the MFP devices that have been registered for use with *MFP Panel* nodes. To add certain MFP(s) to the *MFP Panel* node, you must move the MFP icon(s) from this box to the Selected MFPs box by doing one of the following:
 - Dragging-and-dropping the MFP icons.
 - Checking the All box to select all MFPs listed or checking the boxes next to the MFP icons; then clicking on the Add to Node button.

Once an MFP has been added to the node, it will no longer be listed in this box.

- Selected MFPs This area contains the registered MFPs that the MFP Panel node may scan from. To remove an MFP from this area, you can do one the following:
 - Drag-and-drop the MFP(s) back into the Available Registered MFPs box, or

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- Check the All box to select all MFPs listed or check the boxes next to the MFP icons; then click on the Remove button.
- Select MFP Groups This area allows you to add any pre-assembled MFP group you would like to any workflow without having to stop and edit anything.



- Help Access online help about the node.
- Save Keep the definition for this node.
- Cancel Exit the window without saving any changes.



Firewall Note

Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix *MFP Panel* nodes. By default, *MFP Panel* nodes use port 50808 (port 50809 for SSL connections). However, this port number is configurable, so it may differ if the number has been changed. If the connection fails, the following message will display on the device panel:

"Connecting to server..."

To allow *MFP Panel* nodes to connect properly, please consult your firewall application documentation to either stop blocking port 50808, port 50809, or to allow access by the workflow engine process, "blox-erl.exe."

Running a MFP Panel Node Workflow

Now that the MFP Panel node has been set up and included as part of a workflow, you can run a MFP Panel workflow from the device panel.

Note: Before workflows can be accessed at the MFP, they must be running in Dispatcher Phoenix. Make sure you click the Start button () to start any of your MFP Panel workflows that you would like to run from the device panel.

1. At the device panel, tap on the **App** button to see all registered applications, or the **Dispatcher Phoenix** button to go directly to your Dispatcher Phoenix workflows.

When starting the **application using an SSL connection**, the MFP may display the following message: "This page is protected. Information will be encrypted for sending and receiving." To hide this message, use the MFP web browser to go to a site that uses SSL (such as https://www.google.com) and select the checkbox labeled: "Do not show this message again" when the message is displayed.

2. You may have to log in at the MFP in order to access your Dispatcher Phoenix workflow (if you have **registered your MFP to prompt for user authentication**.

To log in to Dispatcher Phoenix at the device panel, enter your Windows login information in the required fields; then tap on the arrow button.

Note: If the computer that Dispatcher Phoenix is installed on belongs to an Active Domain, the default user name is assumed to belong to the domain. In this case, to log in with local user credentials, you will have to enter the computer name along with the local Windows user name (e.g., "local-pc\jane"). As a shortcut, you can substitute a "." as the computer name (e.g., ".\jane").

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• If you have configured the MFP with the "Show recent users" authentication option, a **User Search** button will appear to the right of the Username field, as in the following illustration:

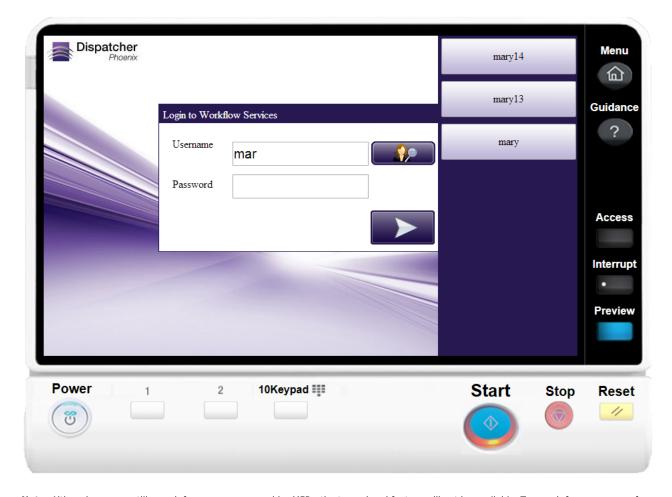


• You can enter a character or a string of characters in the **Username** field and a list of user names which match or include the characters entered will appear on the right-hand side of the screen. This **type ahead** feature is only available on newer MFP models.

Note: The list of recent users is cached at the MFP. Deleted users won't be reflected on the MFP until Dispatcher Phoenix is unregistered and then reregistered on the MFP.

In the following illustration, the user typed in "mar" and the user names that included those characters were automatically displayed:

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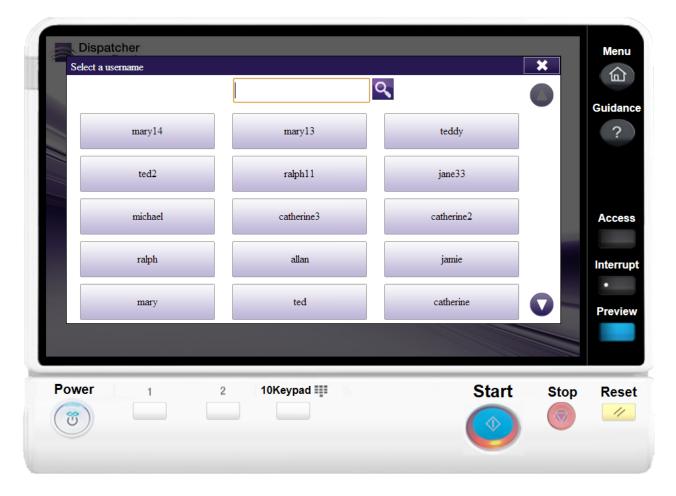


Note: Although you can still search for user names on older MFPs, the type ahead feature will not be available. To search for user names from the Login screen on older MFPs, enter a character or a string of characters in the Username field; then tap on the User Search button. You will then be directed to the User List screen, which displays the results of your filtered search.

• To view ALL recently logged-in users, tap on the User Name Search button next to the Username field or press Ctrl + F on the keyboard.

A list of previously logged-in users (up to 1000) will appear on a User List screen which has navigational arrows that allow you to scroll up and down, as in the following illustration:

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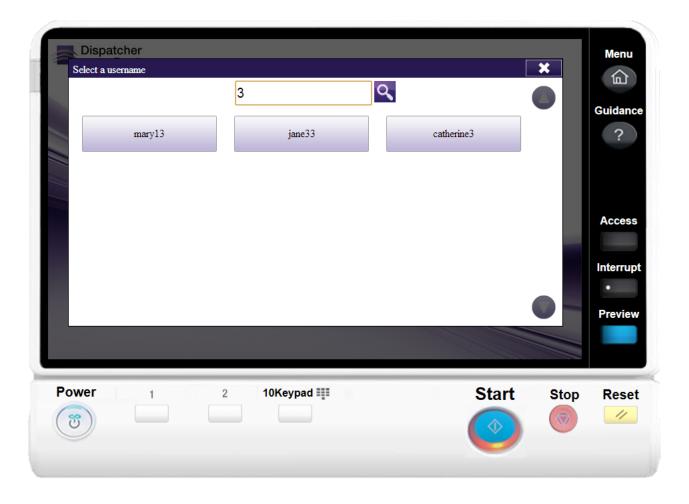
On this screen, you can do the following:

• Tap on the user name button that you want to use to log into Dispatcher Phoenix. You will be brought back to the Login screen with the user name that you selected automatically populated in the Username field,

or

- Narrow the list of user names currently displayed by entering a character or a string of characters in the empty Search field provided.
 - On newer MFP models, the filter will be automatically applied, as soon as you begin to enter characters in the **Search** field.
 - On older MFPs, enter a character or a string of characters in the empty Search field provided; then tap on the **Search** button to display the results of the filtered search.

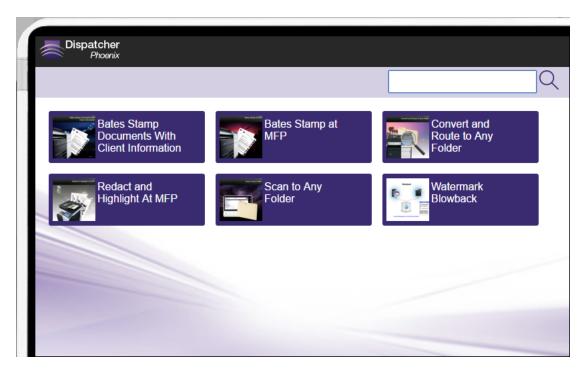
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- 3. Once you access the Dispatcher Phoenix application at the MFP, the Workflow List screen will appear, displaying an alphabetically sorted list of each MFP Panel node workflow that is currently running (if multiple workflows are running at the same time). On the Workflow List screen, select a workflow by tapping on the appropriate workflow button.
 - If only one workflow is running, this Workflow List screen will not appear; instead, the Workflow Details screen for the running workflow will automatically appear.
- 4. Depending on the configuration of the MFP, you will see either a graphical or native view of the Workflow List:

Workflow List - Graphical:

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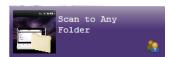
Workflow List - Native:



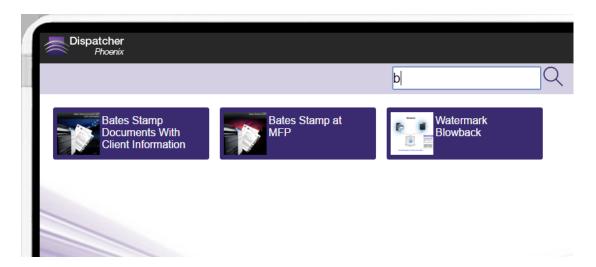
The graphical view of the Workflow List includes the following:

- Navigational arrows so you can scroll up and down.
- Icon to identify **shared** workflows on the lower right hand side of the workflow button, as in the following illustration:

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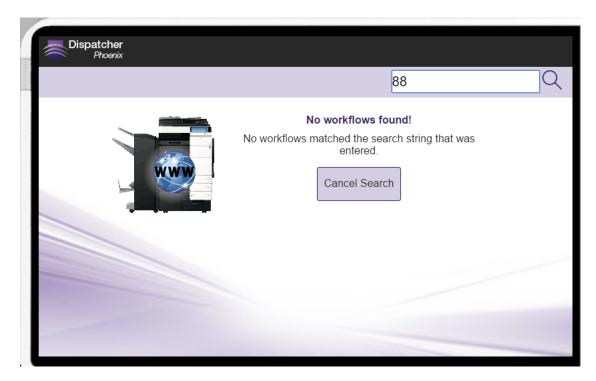


- A **Search** field that can be used to filter the workflows listed. Note that you can only search on the workflow's name, not any other attributes of the workflow. Press **Ctrl + F** to move the input focus to this field.
- 5. Use the Workflow List's Search field to narrow the list of workflows currently displayed. You can enter a character or a string of characters in the field and the filter will be automatically applied, as soon as you begin to enter characters.



Note: For older MFPs, you must tap on the Search button to begin the search.

If your search does not bring up any results, a message will appear on the MFP, similar to the following illustration:



Note: Tapping on the Dispatcher Phoenix logo at the top left hand side of the screen will clear the filtered results of your search.

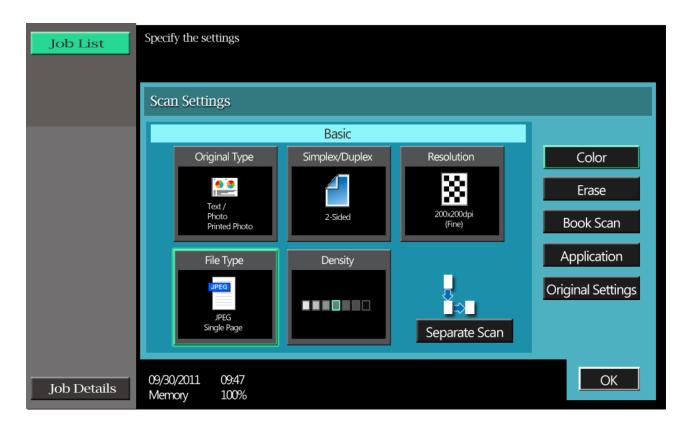
6. Once you choose a workflow, the Workflow Details screen will appear. Depending on the configuration of the MFP, you will see either a graphical or native view:

Workflow Details - Graphical:

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Workflow Details - Native:



• With the graphical view, icons will appear in the Workflow Customization area if the workflow includes an Index Form, customizable Advanced Bates Stamp nodes, Redact nodes, and/or Highlight/Strikeout nodes, as in the following illustration:

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· A red blinking star will appear next to the Index Form icon if the Index Form includes a required field, as in the following illustration:



This red blinking star will **not** appear if the Index Form includes a required field that is pre-populated when the Form first loads on the MFP (such as a drop-down list that is populated with entries from a database or an Output Folder field with a default value already configured in it).

7. Place your documents to be scanned in the document feeder of the MFP. You can either tap on the **Scan** button on the panel or press the blue **Start** button on the MFP to start the scan. If using the MFP's blue Start button, you will not receive a notification message on the panel that your document has been scanned and submitted to Dispatcher Phoenix.

If you have enabled the **Show Scan Preview** option, you will see a preview of the scanned document on the panel. On some MFPs, this option also allows you to select the direction of the document to be scanned. To enable/disable this Original Direction Confirmation screen, log into the MFP as Administrator and then go to the Preview Settings screen (**Utility > Administrator Settings > System Settings > Preview Settings**).

Note: The Show Scan Preview feature is only available on newer MFPs and supported only on MFPs with Graphical User Interfaces. In addition, this feature is not supported on the bizhub PRO 951.

When the **Show Scan Preview** option is enabled, you must tap on the **Send Now** button to send the document to the Dispatcher Phoenix workflow.

8. Press the **Home** button to cancel and return to the main Workflow List screen.

Note: Depending on the MFP model and firmware, the Scan Settings and/or Index Form data may not be retained between scans when using Dispatcher Phoenix via the MFP Native User Interface.

Running Dispatcher Phoenix on Native User Interface

When running Dispatcher Phoenix on MFPs with Native User Interfaces, please note the following limitations/exceptions:

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- Simplex/Duplex options cannot be controlled from the *MFP Panel* node properties window within the Dispatcher Phoenix application. For
 example, to scan 2-sided, you must specify that setting directly on the device control panel, not in the *MFP Panel* node window. Simplex/duplex
 options can be changed on the control panel even if the **Enable editing on MFP panel** option is disabled within the *MFP Panel* node window.
- Depending on MFP model and firmware, Scan Settings and/or Index Form data may not be retained between scans.
- Customizing Bates Stamps and Redact/Highlight/Strikeout search terms at the MFP is not supported.
- Due to MFP limitations, Index Form field labels may be truncated.
- · Index Forms do not use Action buttons; instead, events are triggered when the user changes the contents of the field.
- The ability to create a new folder at the MFP is not supported.
- The maximum number of controls (fields and labels) that can be added to an Index Form is 19.
- · Index Forms for connectors, such as Box and WebDAV, cannot include prepopulated default values for the user name and password fields.

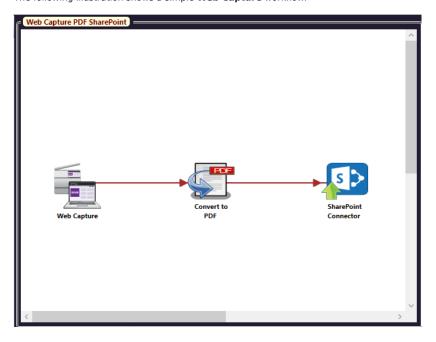
Web Capture Node



The **Dispatcher Phoenix Web Capture** node is a secure document scanning application that enables you to access and run **Dispatcher Phoenix** from any compatible web browser. In this way, you can scan documents into **Dispatcher Phoenix** workflows from any device containing a web browser. Similar to the **MFP Panel node**, the **Web Capture** node supports user authentication, folder browsing, document indexing, and more. For example, with **Web Capture** you can **index** and browse through folders in a document management system such as SharePoint or OnBase from any supported web browser interface. Since you access **Dispatcher Phoenix** from the web browser, files are processed immediately with no scheduling.

Note: Unlike the **MFP Panel** node, **Web Capture** cannot change scan settings via the web browser. Instead, the native MFP scan setting options may be accessible if using the Web Capture application on an MFP.

The following illustration shows a simple Web Capture workflow:



Requirements

Minimum Requirements for **Web Capture** are the following:

- HTML 4.01 Specification and above
- ECMAScript 5th Edition (Equivalent to JavaScript 1.85) and above
- Cascading Style Sheets Level 2 Revision 1 (CSS 2.1) Specification and above
- HTTP Communication protocol 1.1

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· Encrypted communication protocol TLS 1.1 or newer

Supported Browsers

Dispatcher Phoenix Web Capture officially supports the following web browsers, but all browsers that meet the above requirements should function properly as well.

- · Internet Explorer 11 or newer
- Firefox
- · Microsoft Edge
- Google Chrome
- Safari

Device Registration

Before devices can be used by a **Web Capture** node, they must be registered and added to a device group through the **Dispatcher Phoenix Web Devices Tool**. Unlike the **MFP Panel** node, which allows individual devices to be added to workflows, **Web Capture** requires devices to be included in a device group before they can be added to a workflow. In this way, the application recognizes the devices from which it can receive input.

When Your IP Address Changes

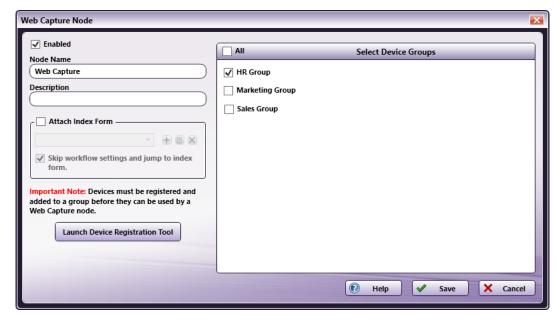
If your IP address changes after **Dispatcher Phoenix** installation, you must update the IP address before you can connect to Dispatcher Phoenix. To update, take the following steps:

- 1. Open Dispatcher Phoenix Web and sign in with Administrator privileges.
- 2. Click on the Devices tile.
- 3. Click on the **Defaults button**.
- 4. Click the **Refresh** button next to the bEST Server Host Name / IP Address field.
- 5. Click **Save** to preserve your changes.

Note: Any changes made on the **Defaults** window are saved but not applied to or validated against any device until the device is either registered for the first time or unregistered and then registered again.

Web Capture Node Setup

Once a device has been registered and added to a device group, you can use it with a **Web Capture** node in **Dispatcher Phoenix**. To begin, add a **Web Capture** node to a workflow, then double-click on the node to open its node properties window.



• **Enabled** - To use this node as an input source, check this box. If unchecked, the workflow ignores this input. While the workflow may still validate, disabled inputs do not collect documents.

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- Node Name Enter a name for this Web Capture node.
- **Description** Enter a description for the **Web Capture** node. While this is not a required field, a unique description can distinguish a node from others in the workflow. If the description is long, hover the mouse over the field to display its entire contents.
- Attach Index Form To add an index form to the workflow, check the Attach Index Form box.
- Skip workflow settings and jump to index form To go directly to the Index Form when accessing your workflow, check this box. If the workflow is the only one running, the Index Form appears directly. If multiple workflows are running, the Index Form appears once you select a workflow.
- Launch Device Registration Tool Click this button to access the Dispatcher Phoenix Web Devices Tool where you can register devices and define device groups.
- Select Device Groups Any existing device groups appear in the panel and are available for selection. Check the box next to one or more device groups containing the devices you want to include in the workflow. You can view the contents of each device group and/or define additional device groups by clicking on the Launch Device Registration Tool button.
- Help Accesses an Online Help topic describing the node.
- Save Saves the current settings and exits the node.
- Cancel Exits the window without saving any changes.

Web Capture Metadata

The following web-capture-specific metadata is created by the **Web Capture** node:

Metadata Value	Description
{webcapture:device_address}	The IP address of the device submitting files to the Web Capture node.
{webcapture:num_files}	The number of files submitted to the Web Capture node.
{webcapture:user_agent}	The user agent details from the web browser.

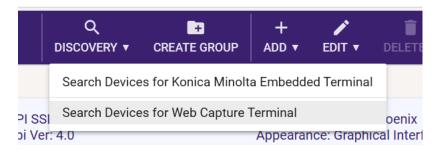
Using Dispatcher Phoenix from a Web Browser

To access **Dispatcher Phoenix** workflows on a web browser using the Web Capture node, take the following steps:

- 1. Open **Dispatcher Phoenix Web** and sign in with Administrator privileges.
- 2. Click on the **Devices tile** to open the Devices home page. Use the toolbar to do the following:

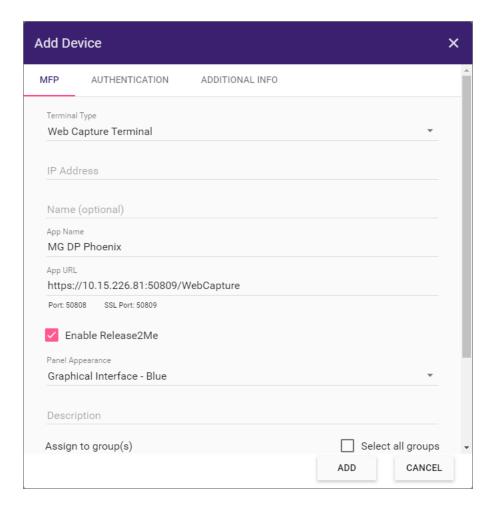


- a. Select **Create Group** to create a new device group for accessing Web Capture.
- b. Select **Discovery** to automatically discover all devices for Web Capture that are broadcast over SNMP. Select the **Search Devices for Web Capture Terminal** option from the drop-down.



c. Select Add to manually add the device for Web Capture. The Add Device window appears, as in the following illustration:

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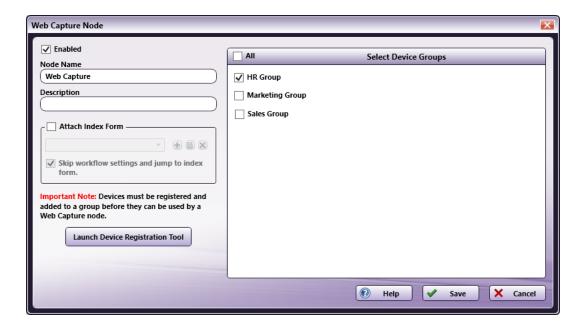


- 3. If using the Add Devices window, do the following:
 - Terminal Type Select Web Capture Terminal.
 - IP Address Enter the IP address of the device.
 - Name Provide a unique name for the app to distinguish it on the Dispatcher Phoenix Web Devices panel.
 - App Name Enter a unique name for your Web Capture application as you want it to appear on the device.
 - App URL The URL for the Web Capture server displays by default. Enter this URL into the web browser URL area to access your Dispatcher Phoenix workflows.
 - Enable Release2Me To access your Release2Me print queue from the web browser, check this box.
 - Assign to Groups Add the device to your groups.
 - Authentication Tab Specify your preferences for authentication.
 - Additional Info Tab Select this tab to add optional device information including Equipment ID, Service Agreement ID, Contact Person and Zip Code.
 - Add Save your changes and exit the Devices page.

Note: See the **Devices Tool** section for more information on the Devices tile.

- 4. Open **Dispatcher Phoenix**. From the Workflow Builder tool, do the following:
 - a. Add the **Web Capture** node to a workflow.
 - b. Attach an index form, if desired, by checking the Attach Index Form box and choosing the + button.

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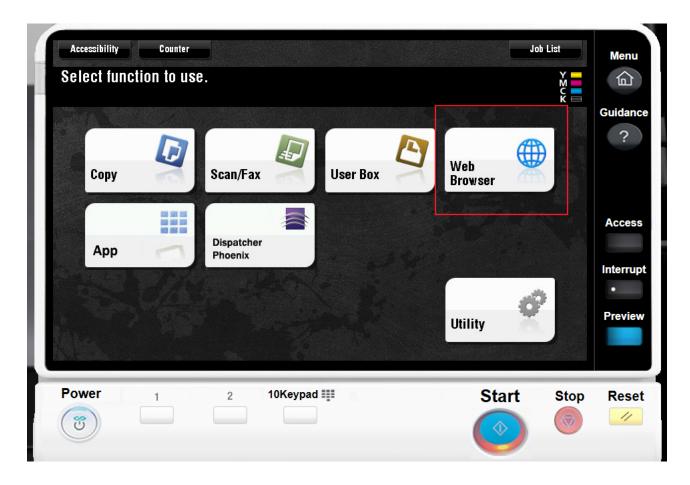
- c. In the **Select Device Groups** panel, select the device group containing your web capture device.
- d. Run the workflow.
- 5. Access the device on which you want to access the web browser. See below for more information.

Accessing Web Capture on a MFP

On a MFP device, do the following to open Dispatcher Phoenix in a web browser:

1. Start the web browser from the MFP control panel.

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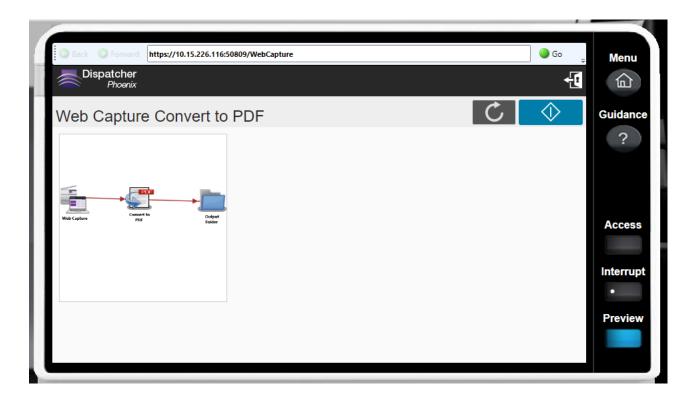


- 2. Tap the URL display area.
- 3. Enter the Web Capture URL. For example, https://10.15.226.116:50809/WebCapture. (Substitute your own IP address).



4. The panel opens and displays any running workflows.

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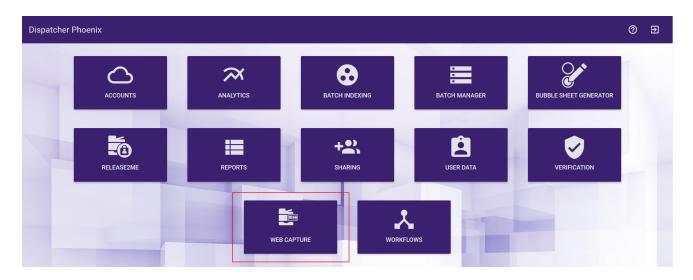


5. Bookmark the page for future use.

Accessing Web Capture on a Computer Device

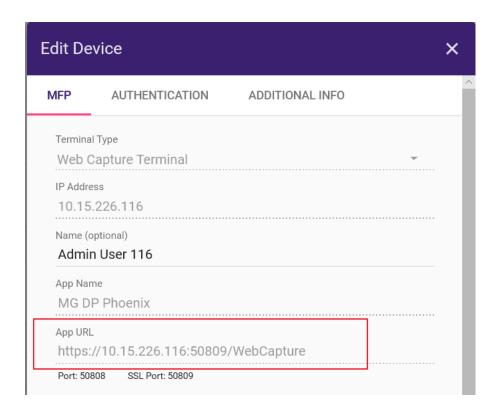
On a computer device, do the following to open Dispatcher Phoenix in a web browser:

 $1. \ \mbox{In Dispatcher Phoenix Web, on the Home page, click on the Web Capture tile.}$

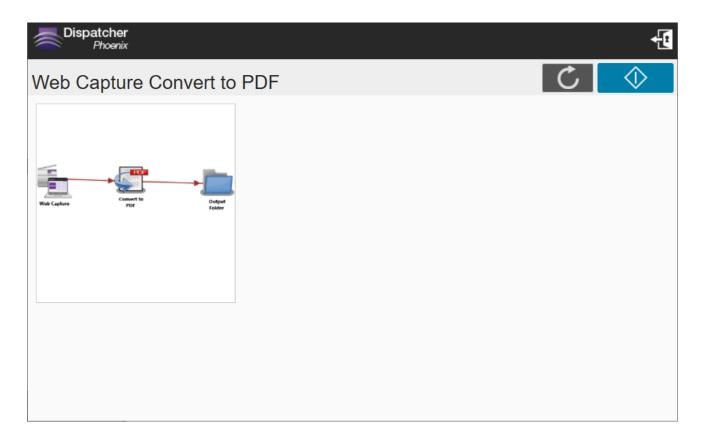


2. Instead of the Web Capture tile, you can also copy the App URL and paste it into the web browser. The App URL resides on the Dispatcher Phoenix Web Devices Tool. You must have Administrator privileges to access the Devices tile.

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3. A web browser window opens and displays any running workflows.



Dispatcher Phoenix Printer Driver

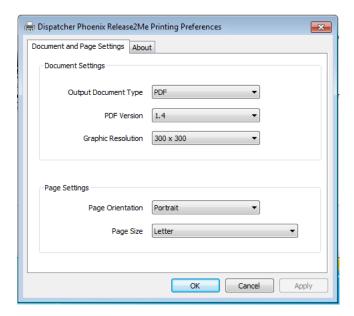
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The Dispatcher Phoenix Printer Driver is automatically installed with the Release2Me solution and is designed to be used by the Dispatcher Phoenix Release2Me node. This Printer Driver, which can be used in any application that is capable of Windows printing, supports printing documents in PDF or TIF format.

Setting Printing Preferences

To configure Dispatcher Phoenix Printer Driver printing preferences, do the following:

- 1. Go to **Devices and Printers** in the Windows Control Panel.
- 2. Right-click on the Dispatcher Phoenix Release2Me printer; then select **Printing Preferences**.



- 3. You can modify the following:
 - Output Document Type (PDF or TIF)
 - PDF version
 - Graphic resolution (please note that increasing the resolution will also increase the file size)
 - Page orientation
 - Page size

Manually Updating the DP Printer Driver

The Dispatcher Phoenix Printer Driver does not support automatic updates. To upgrade the Printer Driver, you must follow these steps (as administrator):

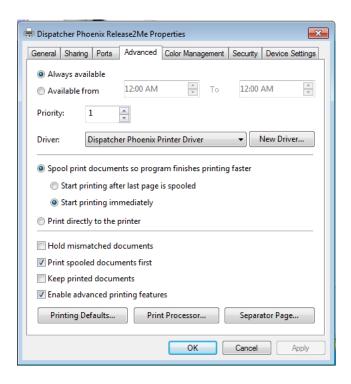
- 1. Delete the Dispatcher Phoenix Printer Driver from all existing printers.
- 2. Remove the Dispatcher Phoenix Printer Driver.
- 3. Install the updated Dispatcher Phoenix Printer Driver.
- 4. Attach the Dispatcher Phoenix Printer Driver to existing printers.

Deleting the DP Printer Driver from Existing Printers

To delete the Dispatcher Phoenix Printer Driver from existing printers, do the following:

- 1. Go to **Devices and Printers** in the Windows Control Panel.
- 2. Right-click on a printer that uses the Dispatcher Phoenix Printer Driver; then select the **Printer Properties** option.
- 3. On the printer's Properties window that appears, select the Advanced tab, as in the following illustration:

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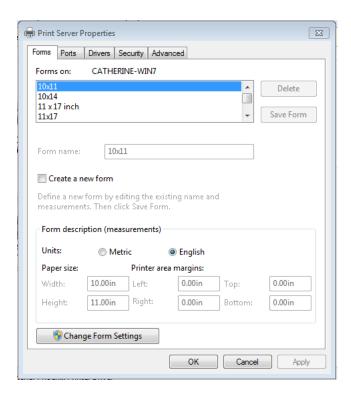
- 4. From the **Driver** pull-down menu, select any other printer; then select the **OK** button.
- 5. Repeat these steps for all printers that use the Dispatcher Phoenix Printer Driver.

Removing Dispatcher Phoenix Printer Driver

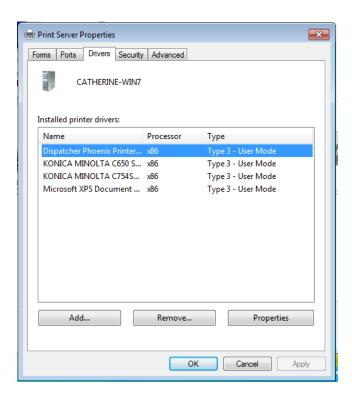
Next, you should remove the existing Dispatcher Phoenix Printer Driver by following these steps:

- 1. Go to **Devices and Printers** in the Windows Control Panel.
- 2. Select any printer listed.
- 3. Select the **Print server properties** button on the top menu bar. The Print Server Properties window will appear, as in the following illustration:

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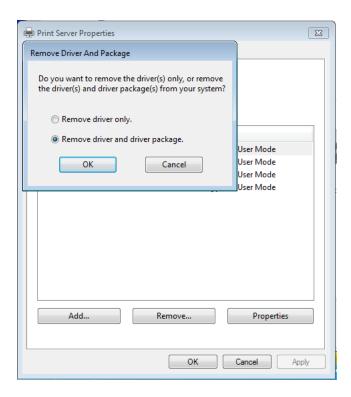


- 4. Select the **Change Form Settings** button.
- 5. Select the **Drivers** tab, as in the following illustration:



- $\hbox{6. Select the Dispatcher Phoenix Printer Driver from the list; then select the {\bf Remove} \ {\bf button}. \\$
- 7. On the Remote Driver And Package window that appears, select the **Remove Driver and Device Package** option; then select the **OK** button, as in the following illustration:

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- 8. Select **Yes** on the confirmation message that appears.
- 9. On the Remove Driver Package window, select the **Delete** button, as in the following illustration:



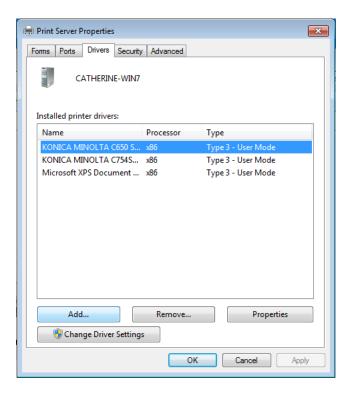
10. Although not a mandatory step, we recommend rebooting your system once the Dispatcher Phoenix Printer Driver has been removed.

Installing the Updated Dispatcher Phoenix Printer Driver

Next, you should install the updated Dispatcher Phoenix Printer Driver by following these steps:

- 1. Repeat Steps #1-4 from the "Removing Dispatcher Phoenix Printer Driver" section above.
- 2. Select the ${\bf Add}$ button, as in the following illustration:

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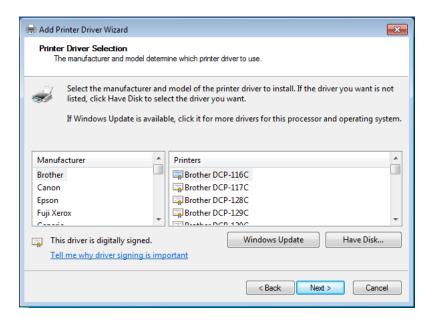


3. The Add Printer Driver Wizard will appear, as in the following illustration:



- 4. Select the **Next** button.
- 5. On the Processor and Operating System Selection window, select the Operating System; then select the **Next** button. The Printer Driver Selection window will appear.
- 6. On the Printer Driver Selection window, select the **Have Disk** button, as in the following illustration:

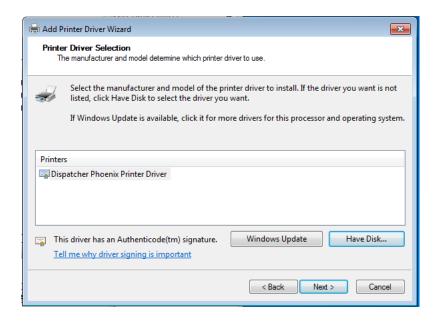
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- 7. On the Install From Disk, select the **Browse...** button.
- 8. Go to either:
 - · C:/ProgramData/Konica Minolta/blox/print-driver/dpp-printer-drivers/x64 for 64-bit Operating Systems,

or

- C:/ProgramData/Konica Minolta/blox/print-driver/dpp-printer-drivers/x86 for 32-bit Operating Systems
- 9. Select the kmdppdrv.inf file; then select the **Open** button.
- 10. On the Install from Disk window, you should see the directory path listed in the **Copy manufacturer's files from** field. Select the **OK** button to continue.
- 11. On the Printer Driver Selection window, you should see the Dispatcher Phoenix Printer Driver listed under Printers, as in the following illustration:



- 12. Select the **Next** button.
- 13. Select the Finish button on the Completing the Add Printer Driver Wizard window.

Attaching DP Printer Driver to Existing Printers

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As the last step, you should attach the updated DP Printer Driver to all existing printers by following these steps:

- 1. Go to Devices and Printers in the Windows Control Panel.
- 2. Right-click on a printer; then select the **Printer Properties** option.
- 3. On the printer's Properties window that appears, select the Advanced tab.
- 4. From the **Drivers** pull-down menu, select the Dispatcher Phoenix Printer Driver; then select **OK**.
- 5. Repeat these steps for all other printers that should use this driver.

Dispatcher Pro Port

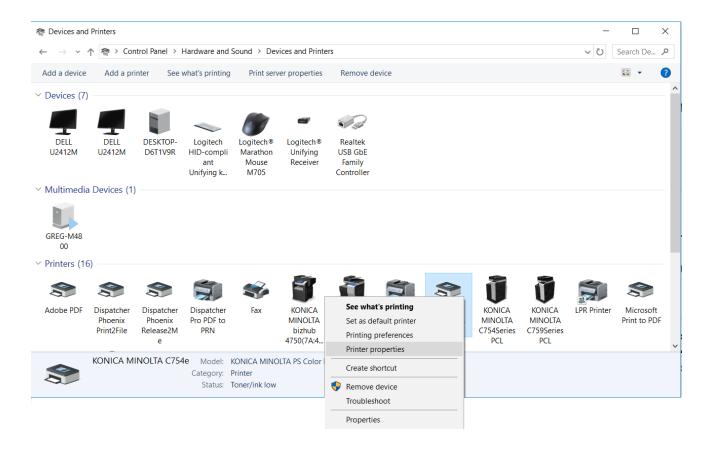
A Windows device driver will be installed with Dispatcher Phoenix, which creates a new printer port type called the *Dispatcher Pro Port*. The port supports the print-to-file feature for any Windows application, and requires a valid Dispatcher Phoenix license to access and use the port's functionality.

Note: If the language of the Operating System is not English, the driver and printer are not automatically installed with Dispatcher Phoenix. In this case, you must manually add the Dispatcher Pro Port to a new printer.

Setting up the Dispatcher Pro Port on Windows

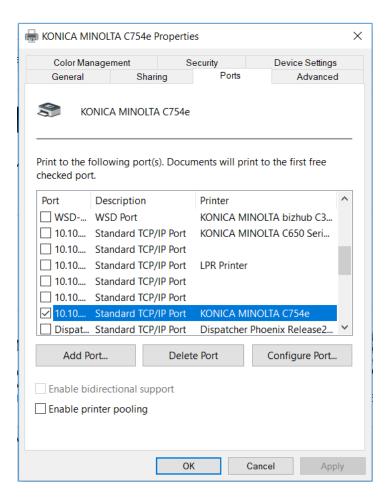
To set up Dispatcher Pro Port on an existing printer, do the following:

- 1. From the Start Menu, select Control Panel and open View Devices and Printers.
- 2. Right-click on any installed printer and select Printer Properties.



3. Click on the **Ports** tab.

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- 4. Select the Add Port... button.
- 5. Select **Konica Minolta Dispatcher Pro Port** from the available port types.
- 6. Select the **New Port...** button.
- 7. Select a directory for the output files, and click **OK**. Make a note of this special Output directory.
- 8. Click **Close** in the window. The new port will appear on the port tab list.
- 9. Select the newly created port and click Apply.

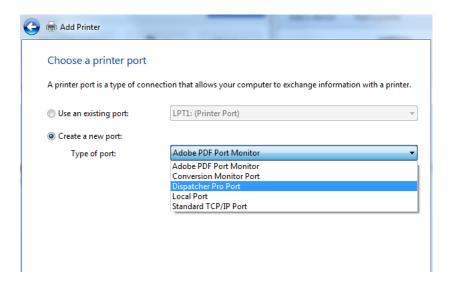
You can now use the selected printer with the Print-to-File feature with Print Nodes.

Adding Dispatcher Pro Port to a New Printer

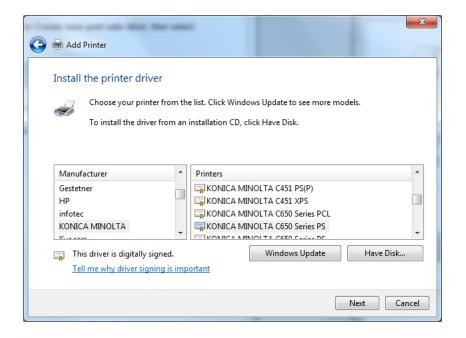
To add Dispatcher Pro Port to a new printer, do the following:

- 1. From the Windows Start menu, choose **Devices and Printers**.
- 2. On the Control Panel > Hardware and Sound > Devices and Printers window, choose the Add a printer option at the top of the screen.
- 3. In the Add Printer window that appears, select the ${\bf Add\ a\ local\ printer}$ option.
- 4. In the next window that appears, choose the Create new port radio button; then select Dispatcher Pro Port from the list.

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5. Select **Next** and a "Browse for Folder" pop-up window will appear, allowing you to choose a folder for output files that will be used by the Dispatcher Pro Port. Once you choose a folder and select the **OK** button, the Install the printer driver window will appear:



- 6. On this window, you should choose Konica Minolta as the manufacturer and choose any printer from the Printers column. Once you select the **Next** button, the Type a printer name window will appear.
- 7. On the Type a printer name window, enter a name for the **Dispatcher Pro Port** printer; then select the **Next** button.
- 8. In the Printer Sharing window, choose the **Do not share this printer** radio button; then select the **Next** button.
- 9. On the final window, select the **Finish** button.

LPR In Node



LPR In is an optional node that collects print jobs from an LPR Client like the Windows Printer Queue. Similar to the Print to File process, the LPR Client converts files into a format that can be used by other process nodes in the workflow. In other words, the LPR In Node allows the Dispatcher Phoenix application to appear like a network printer for job submissions. The data format of the converted files will depend on the print driver but, in most cases, is PCL or Postscript.

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Some imaging applications, such as Windows Picture and Fax Viewer, will rename output files when printing. In this case, to prevent files from overwriting each other, you may choose to either not use that application or add a rename process to your workflow. Microsoft Paint and Adobe Photoshop do not rename files.

In order for this node to work correctly, the port for LPR printing must be configured with a queue name that will also be specified in the LPR In node. Once the LPR port and the LPR In node have been set up correctly and Windows Services have been started, you can print from any application and the files will be sent directly to the LPR In node to initiate the workflow.

LPR Metadata included with the print job can be used in other nodes, such as the Output Folder node and the Email Out node.

Note: When the system is under heavy load, performance of external services may be impacted. As such, we recommend that heavy processing be done on a faster system with multiple cores.

Examples of use include:

- To parse for Postscript commands in the data files generated by the LPR print driver (using parsing nodes such as Parse and Insert to insert tray calls or other manufacturer commands); note that parsing the original content of these files may or may not be successful depending on the print driver selected.
- To avoid tying up your company's printer during optimal business hours and speed up the printer's output processing time since the LPR print driver spools first.
- To send documents collected from the LPR In node to two different places in the workflow: one branch leading to a printer and the other branch leading to an Output folder for archival purposes.
- · To print from multiple PCs to one workflow.

Important! If Windows LPD/LPR Service is installed, Dispatcher Phoenix's LPR Service will be incompatible with it since both services use Port 515. While Dispatcher Phoenix LPR Service is in use, you will need to stop (or uninstall) the Windows LPD/LPR Service. To stop the Windows LPD/LPR Service in, do the following:

1. Open up **Dispatcher Phoenix** and go to **Tools** on the right hand side of the top toolbar. Then select **Options** and the following image will appear:



2. Go down to **LPR Services** and then click on **Edit** in the settings box. A window will pop up asking to make changes. Click **Yes**, and then the following image will appear:

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3. Click Stop Service, and then you can close out.

Note: Enable "Broadcast on local network" only if you want others to be able to locate your LPR printer.

Using this Node

Using this node involves the following steps:

Step #1 Configuring the LPR Port

Step #2 Configuring the LPR In node

Step #3 Starting the Windows Service

Step #4 Starting the LPR Service



Third-party firewall applications, including some anti-virus software, may block the port used by Dispatcher Phoenix LPR In nodes. By default, the LPR In node uses port 515. To allow LPR In collection to function properly, please consult your firewall application documentation to either stop blocking port 515 or to allow access by the workflow engine process, "blox-erl.exe."

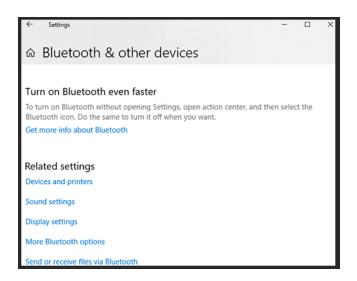
(These instructions are for Windows 10)

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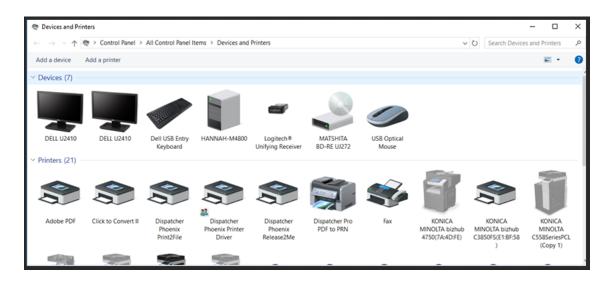
Step #1 Configuring The LPR Port

To use the LPR In node, you must first configure the LPR port, do the following:

1. Either go to your **Start** menu and click the **Settings** icon or look up **Bluetooth and other device settings** in the **Start** search bar. From here the following illustration will appear:

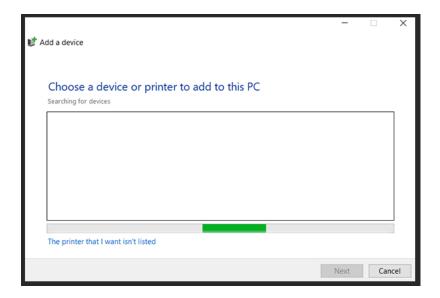


2. Click on **Devices and printers** under **Related settings**, and you will be brought to the following window:

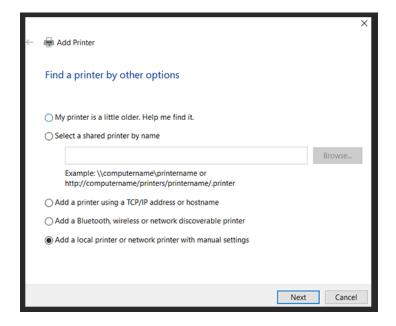


3. Click on **Add a printer** to choose a printer as shown in the following illustration. At the bottom, select **The printer that I want isn't listed** to manually add your printer.

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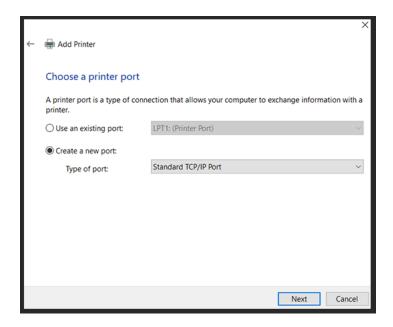


4. On the Add Printer menu, select the bottom circle next to **Add a local printer or network printer with manual settings** and click **Next** as shown in the following illustration:

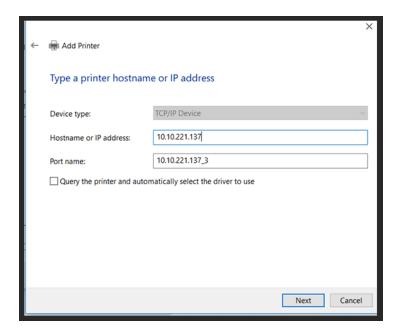


5. Select Create a new port and select Standard TCP/IP Port in the field next to it, as shown in the following illustration:

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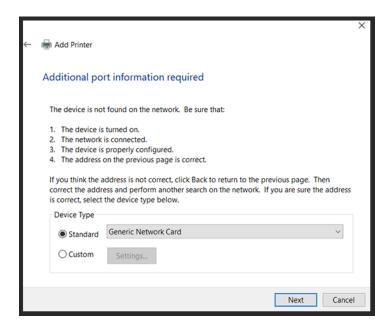
6. Type the Hostname or IP address, but don't check the box to query the printer. Then click Next as demonstrated in the following illustration:



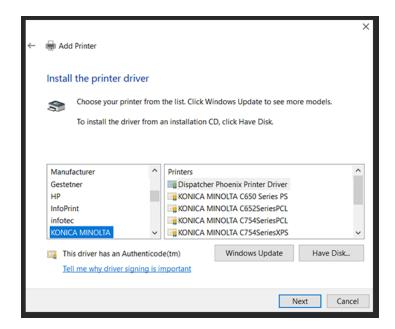
Note: If you're unsure of your IP address, type **Command Prompt** in the **Windows Start** menu and type in **ipconfig.** Hit **Enter** and then look for the numbers next to **IPv4 Address**.

7. The **Detecting TCP/IP port** message will appear, and once that is finished the **Additional port information required** window will appear. Leave everything as it appears with the **Standard Device Type** checked, and then click **Next** as shown in the following illustration:

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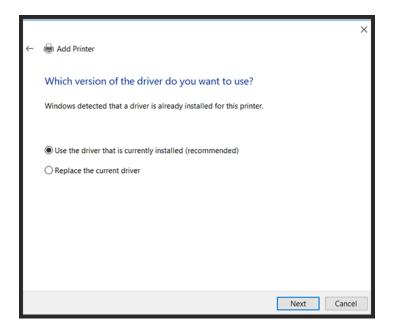


8. Select **KONICA MINOLTA** in the **Install the printer driver** window, and click on the printer you want to connect to. Then click **Next** as shown in the following illustration:

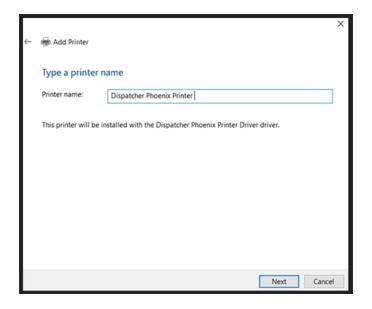


9. Use the driver that is currently installed, and then click Next as shown in the following illustration:

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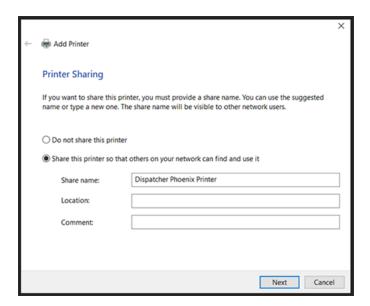


10. Enter a name for your printer and then click **Next** as shown in the following illustration:

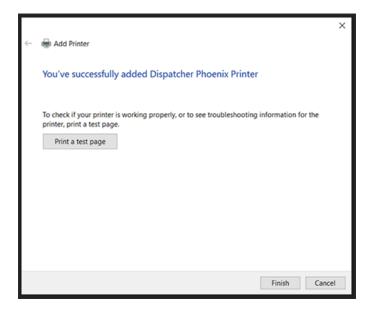


11. Share the printer and click Next as shown in the following illustration:

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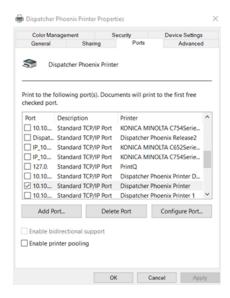


12. Print a test page or just click **Finish**.



13. Once the printer is added, go back to the **Devices and printers** page to find the printer you just added, right-click on it, and then select **Printer properties**. Go to **Ports** at the top and then click **Configure Port** at the bottom as shown in the following illustration:

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14. Select the LPR circle under Protocol and create a queue name. Then click OK as shown in the following illustration::



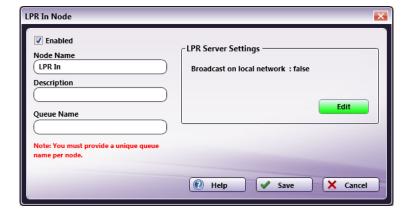
Note: The queue name must match the name you designate in the LPR node, and if your workflow contains multiple LPR In nodes, each queue name must be unique.

Step # 2 Configuring the LPR In Node

Now you can include the LPR In node as part of your workflow. Drag an **LPR In** node into the Workflow Builder canvas; then double-click on the icon to open the *LPR In Node* window. Use the *Properties* panel on the right side of the screen to define how the node looks in the workflow, and use the LPR In Node window for the actual *LPR In* definition.

The LPR In Node window resembles the following illustration:

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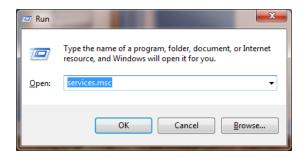
On the LPR In Node window, do the following:

- Make sure the Enabled box is checked. When unchecked, this input will be ignored and documents will not be processed from this input location.
- In the **Node Name** field, enter a meaningful name for the "Collect from" node.
- In the **Description** field, enter a description of the LPR In node. This is not required, but can be helpful with multiple collection points. If the description is too long, you can hover the mouse over the field to read its entire contents.
- In the Queue Name field, enter the same queue name that was specified for the LPR port.
- If you need to edit the settings of the LPR Service, select the **Edit** button to launch the LPR Manager.
- Select the *Save* button when you are done. You can also select the *Help* button to access online help, or select the *Cancel* button to exit the window without saving any changes.

Step # 3 Starting the Windows Service

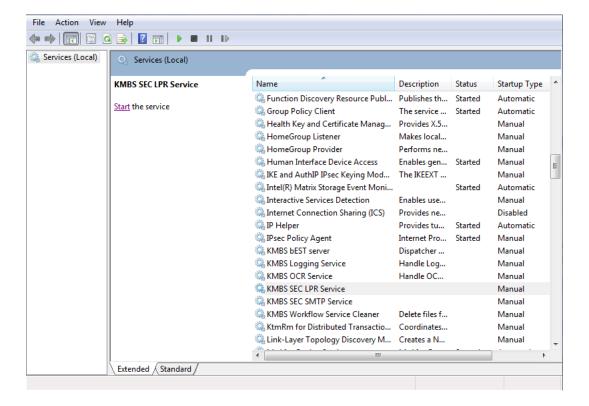
To start the Windows Service, do the following:

1. Access the Windows Run window by either searching for "Run" from the Start menu or by pressing the Windows Key + R. The Run window will appear, as in the following illustration:



2. On the Run window, enter **services.msc** in the Open field; then select the **OK** button. The Start Services window will appear, as in the following illustration:

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3. On the Start Services window, select the KMBS SEC LPR Service; then click the Start the service link.

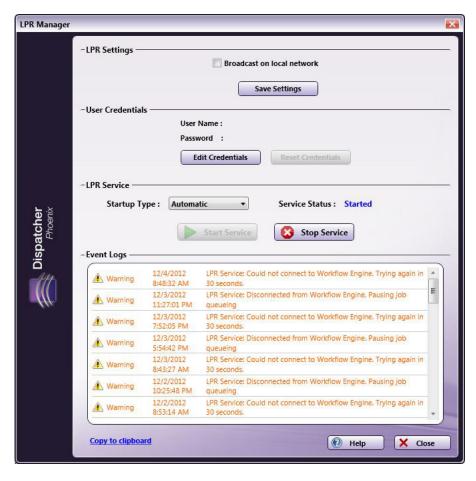
Step # 4 Starting the LPR Service

Make sure that the LPR Service is running before you run a workflow that contains an LPR In node. The LPR Service can be started by selecting the **Start Service** button on the **LPR Manager**, which is accessed from either the **LPR In** node or from the **Tools** menu on the main application screen.

Note: When LPR is installed separately (after the initial installation of the application), it will not be configured to start automatically. Additional configuration may be necessary before running the LPR Service successfully.

The LPR Manager resembles the following illustration:

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The LPR Manager allows you to edit LPR Service settings.

Note: In order for any changes to take effect, the service must be restarted.

LPR Settings

• Broadcast on local network. This check box allows you to enable or disable automatic discovery of the LPR print driver on the networks. When this option is enabled, the LPR printer will "announce" its presence on a local network. In this way, you could use a discovery tool like Bonjour for Windows to easily find the LPR printer. When using an mDNS client to install or configure a Windows printer, the LPR queue name may need to be configured separately to match the LPR In node's queue name.

Note: In order to use this option, you must have the Bonjour for Windows service installed on your system.

- Save Settings. Click on this button to save the LPR Settings you may have configured.

User Credentials

When Dispatcher Phoenix is first installed, this area appears blank, and the default user name and password for SEC Workflow Services is automatically used. The User name and Password areas only become populated if you change your user credentials for this service.

• If you need to change the credentials that are used to authenticate against the Workflow Services running (e.g., you have changed the Workflow Services password or want to use the Windows logged-in user's credentials), select the **Edit Credentials** button.

This will open the Windows Credential pop-up where you can choose a new user name and enter the appropriate password.

- To restore your changed credentials to use the default user name and password, select the **Reset Credentials** button. The user name and password will appear blank again.
- Restart the LPR Service after making any changes to your credentials.

LPR Service

This section of the LPR Manager allows you to activate inbound communication with the LPR driver.

- Startup Type Select how the LPR Service should start. These options are in sync with the Windows Services Manager. Options are:
 - Automatic (Delayed Start) The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots). This option is only available on Windows 8 and higher Operating Systems.
 - $\circ~$ Automatic The service starts when the system first starts.

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- Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
- Disabled The user is prevented from starting the service at any point.
- Start Service button. Select this button to start the LPR Service.
- Stop Service button. Select this button to stop the LPR Service. By default, the LPR Service will not be running when the application first starts.

Event Logs

This section of the LPR Manager displays the LPR Service's event logs.

• Copy to clipboard. Click this link to copy the event logs to the clipboard.

DSP Local In



The DSP Local In node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Local In Node

To open the DSP Local In node window, add a collection node for DSP Local In node and double-click on it.



There are several buttons and fields that appear, including:

- Enabled To enable this node in the current workflow, check the box at this field. When unchecked, this input will be ignored. While the workflow will still validate if there is at least one enabled collection node, documents will not be collected by the DSP Local In node if the Enabled box is unchecked.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

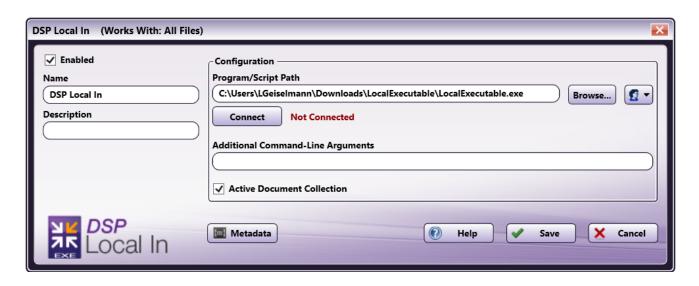
Application Setup

To use this with a DSP-developed local executable, you must configure the node to point to the executable's location (e.g., an accessible folder). After the desired application is saved in the accessible folder, you can direct the DSP Local In node to use it. To configure the node, do the following:

1. Double-click the DSP Local In node to open it.

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2. Enter the file path to the application. You can also use the **Browse** button to open a folder browser to find the application.



- The **Authorization** button allows you to enter or edit network credentials, if they are necessary to access the folder the application resides in
- 3. Select the **Connect** button. This will establish a connection between the DSP Local In node and the application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

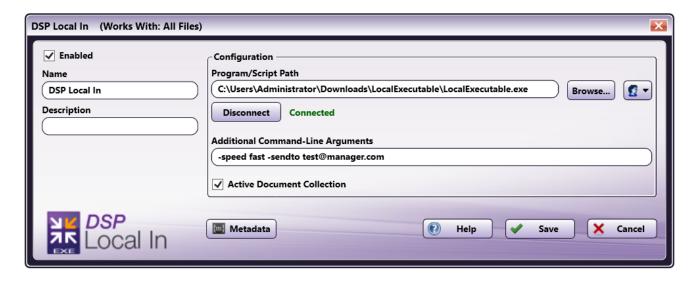


Important! If you have not successfully connected, the workflow cannot be properly validated.

Note: Any changes made to the Program/Script Path or Network Credentials will require you to select the **Connect** button to reestablish the connection.

4. Enter any **Additional Command-Line Arguments** in the field provided. Command-Line Arguments are additional coding commands outside the application, which can alter how the application performs. Any necessary command-line prompts will likely be provided along with the application; otherwise, this field can be left blank. This field is metadata compatible, meaning that you can use the **Metadata** button to drag and drop metadata gathered earlier in the workflow into this field.

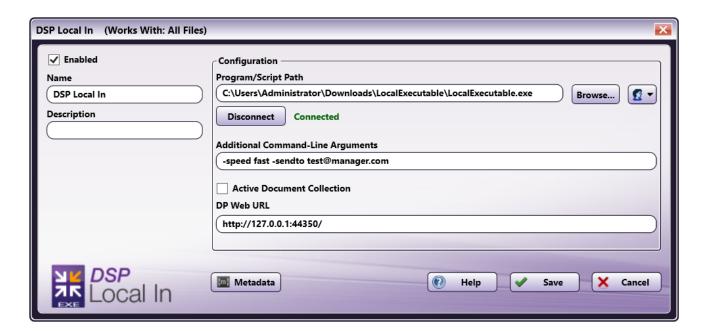
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Notes:

- When entering a singular argument that includes multiple words, you will need to enter the phrase within quotation marks. For example, if a connected program expects a folder path name and the name includes spaces, the argument would look like: "C:\Program Files\Konica Minolta".
- The DPS Local In node can process two types of double-quoted arguments:
 - Double quote (each with a backslash) in a double-quoted argument (i.e. "A \"quote\" within a quote.")
 - Single quote in a double-quoted argument (i.e. "A 'quote' within a quote.")
- When entering an argument that includes a single quotation mark ("), a single quote/apostrophe ('), or a backslash (\), you will need to enter a backslash (\) before each symbol in order to properly process the argument. For example, if the application were trying to send the name 0'Brien, you would need to enter the argument as 0\'Brien to include the single quotation mark.
- 5. For **Active Document Collection**, leave this box checked. This configuration allows the **DSP Local In** node to continually check for new documents. By unchecking the box, the node will no longer actively check for documents, but will wait for the executable to tell it there is a file waiting to be collected. If you uncheck the box, you must enter your Dispatcher Phoenix Web URL to ensure communication between the node and the executable.

Note: If the **Active Document Collection** box is unchecked, the Dispatcher Phoenix installation and local executable must be hosted on the same machine. Dispatcher Phoenix and the local executable do not need to be on the same machine if the **Active Document Collection** box is checked.



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6. Save and close the node.

Notes:

- The DSP Local In node will collect documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.
- The DSP Local In node has a maximum file size of 4 MB on most systems. For more information, please contact your Dispatcher Phoenix representative.

DSP Web In



The DSP Web In node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Web In Node

To open the DSP Web In node window, add a distribution node for DSP Web In node and double-click on it.



There are several buttons and fields that appear, including:

• Enabled - To enable this node in the current workflow, check the box at this field. When unchecked, this input will be ignored. While the workflow will still validate if there is at least one enabled collection node, documents will not be collected by the DSP Web In node if the Enabled box is unchecked.

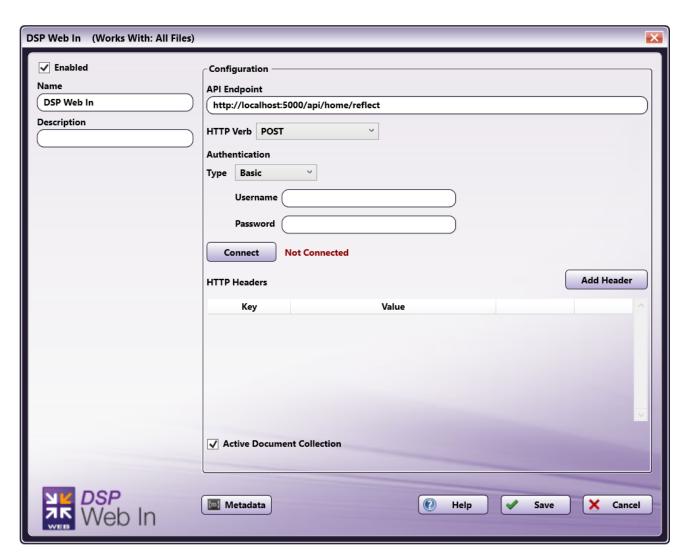
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- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

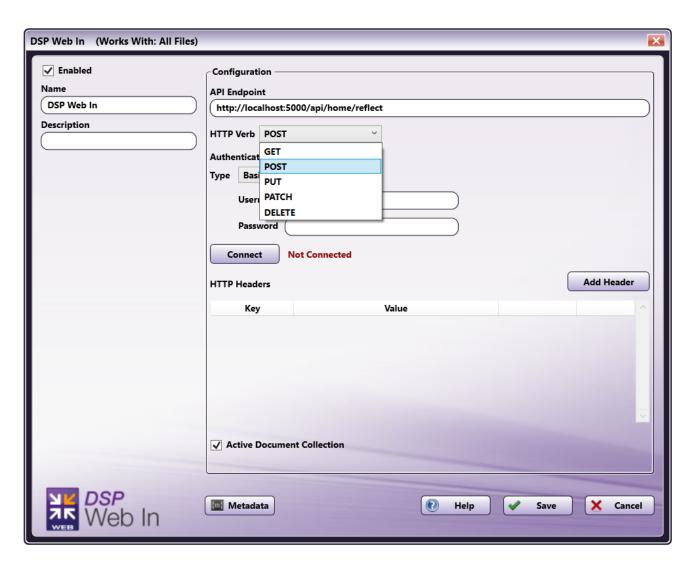
To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API's location (e.g., a URL). To configure the node, do the following:

- 1. Double-click the DSP Web In node to open it.
- 2. Enter the API Endpoint to the application.



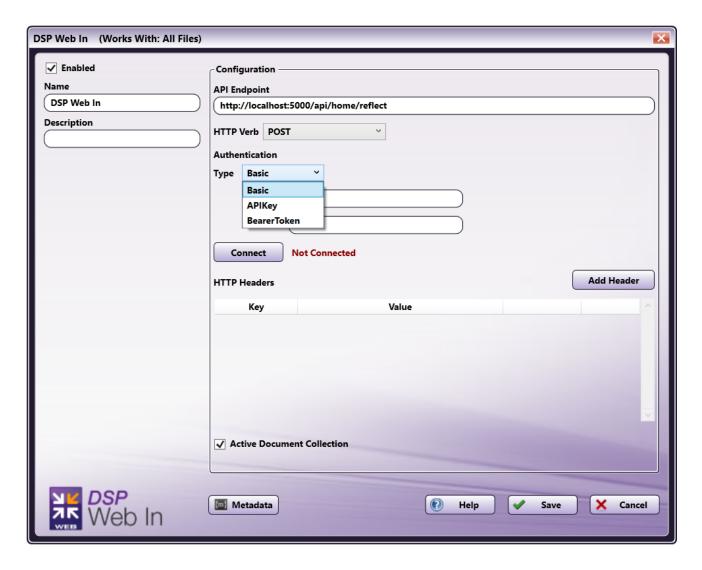
- 3. Select the \boldsymbol{HTTP} $\boldsymbol{Verb}.$ Options include
 - Get
 - Post
 - Put
 - Patch

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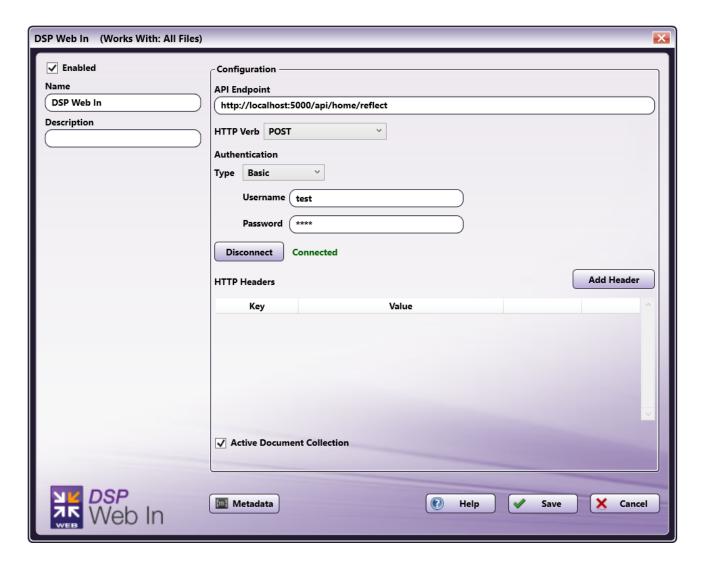
- 4. Select your **Authentication** type. Options include:
 - $\circ~$ Basic This will prompt you to enter your Username and Password.
 - APIKey This will prompt you to enter your **Key Name** and **Key Value**.
 - Bearer Token This will prompt you to enter your **Token**.

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5. Select the **Connect** button. This will establish a connection between the DSP Web In node and the application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

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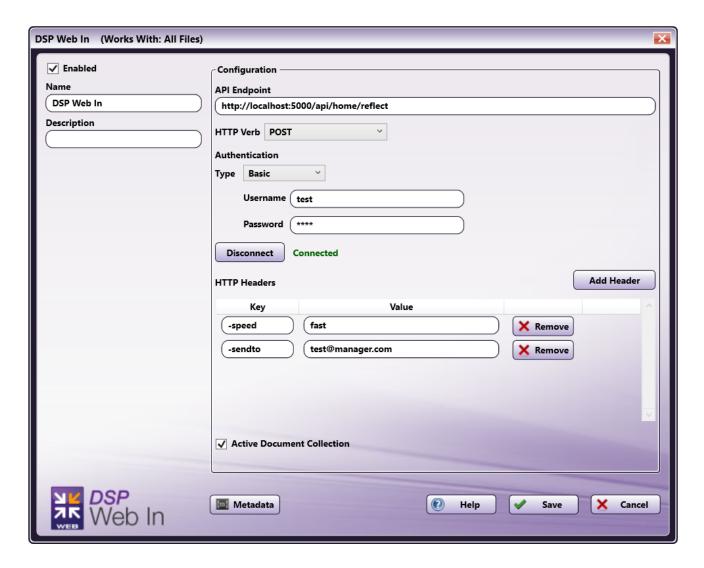


 $\textbf{Important!} \ \textbf{If you have not successfully connected, the workflow cannot be properly validated}.$

Note: Any changes made to the API field will require you to select the Connect button to reestablish the connection.

6. If needed, add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header. Headers are also metadata compatible. To add metadata to a Header, click the **Metadata** button and drag-drop the metadata key into the Header **Key** or **Value** field.

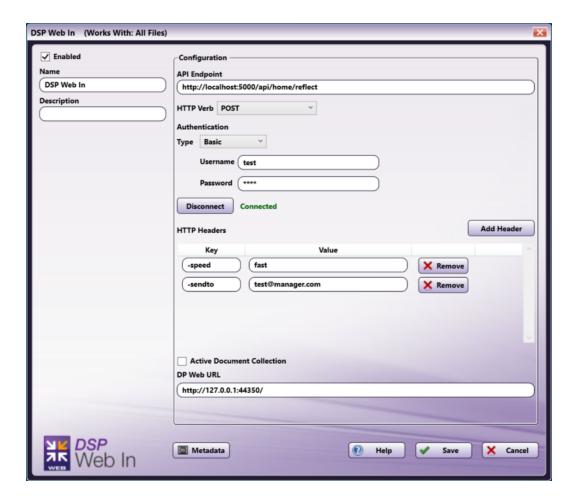
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7. For **Active Document Collection**, leave this box checked. This configuration allows the **DSP Web In** node to continually check for new documents. By unchecking the box, the node will no longer actively check for documents, but will wait for the web API to tell it there is a file waiting to be collected. If you uncheck the box, you must enter your Dispatcher Phoenix Web URL to ensure communication between the node and the web API.

Note: If the Dispatcher Phoenix installation and web API are hosted on devices with different IP addresses, you must configure the DSP Web In node with the full explicit DP Web URL in order for the third party application to reach your DP Web.

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8. Save and close the node.

Note: The DSP Web In node will collect documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

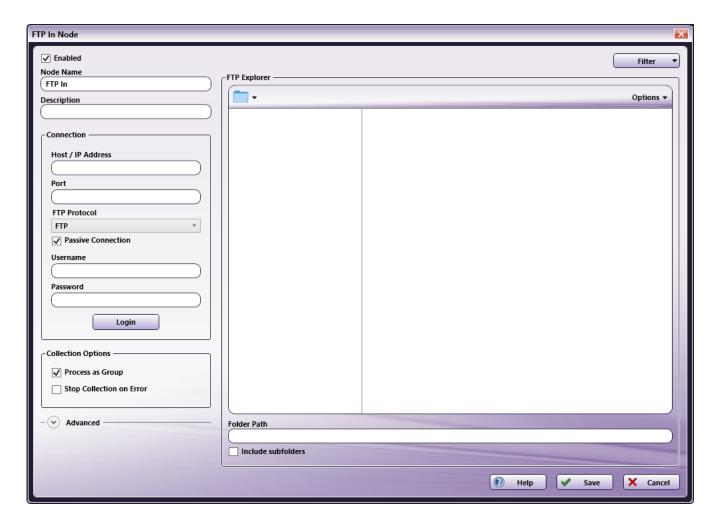
FTP In



The **FTP In** collection node connects to an FTP server to monitor a configured folder for new files at a regular interval. This collection node can also filter files by name, size, or modified date prior to passing documents along a workflow for processing and routing.

To open the FTP In node, add a collection node for FTP In to the workflow; then double-click on it.

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Do the following:

- 1. Make sure the **Enabled** box is checked. When unchecked, this input will be ignored. While the workflow will still validate, documents will not be collected and may be lost.
- 2. In the Node Name field, enter a meaningful name for the FTP In node.
- 3. In the **Description** field, enter a description for the FTP In node. Although this is not required, it can be helpful when you have more than one input. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. In the **Connection** area, enter the following settings to connect to an FTP server:
 - Host / IP Address: The address of the FTP server.
 - Port: The port of the FTP server.
 - **FTP Protocol**: The FTP protocol over which the connection will be made and the files will be transmitted. The options include: **FTP** or **FTPS** (FTP over SSL). FTPS can be implicit or explicit encryption.
 - Passive Connection: Select this check box when using a passive connection. With a passive connection the client establishes a command
 channel which prompts requests for the server to begin listening on a port. The client then opens a data connection with that open port.
 Otherwise, the connection to the FTP server will be by active connection meaning the client must establish a command channel while the
 server establishes a data channel.

Note: A passive connection may be required when there is a firewall present.

- 5. If authentication on the server is required, enter in the Username and Password associated with the FTP server in the Authentication area.
- 6. Use the **Login** button at the bottom of the Connection area to verify that Dispatcher Phoenix is communicating correctly with the FTP server.
- 7. In the ${\bf Collection\ Options}$ section, select the relevant options:
 - **Process as Group**: When this option is checked, files from the folder will be processed as a group. When this box is unchecked, files will be processed from the FTP server individually.
 - Stop Collection on Error: When this option is checked, file collection will be stopped when an error occurs.
- 8. In the **Advanced** section, configure the following options:

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- **Data Connection Timeout**: The time, in seconds, in which a data connection attempt will last before timing out and being counted as failing.
- Log All Communications: When this option is checked, the FTP In node will log all FTP communications in the Dispatcher Phoenix activity log (debug level logging required).
- 9. Once the connection with the FTP server has been established, use the **Filter** drop down in the upper, right-hand corner to identify the conditions, if any, for collecting files. When using filters, only files that meet the specified criteria will be collected from the FTP server.
 - Filter File Name: Check this box to enable the collection of files that match the identified file name, including the file extension.
 - In the File Name field, enter in the **File Name** that Dispatcher Phoenix should collect from the FTP server.
 - Select Regular Expression box to dynamically filter files using a pattern describing a certain amount of text.
 - Check the box next to **Match Case** if the file name is case sensitive.

Note: Only one of these options can be enabled at a time: Match Case or Regular Expression.

- Filter Folder Name: Check this box to enable the collection of files from folders that match the identified folder name.
 - In the Folder Name field, enter in the **Folder Name** that Dispatcher Phoenix should collect files from on the FTP server.
 - Select Regular Expression box to dynamically filter folders using a pattern describing a certain amount of text.
 - Check the box next to **Match Case** if the folder name is case sensitive.

Note: Only one of these options can be enabled at a time: Match Case or Regular Expression.

- Filter File Size: Check this box to select the size criteria the file should meet before it is pulled from the FTP server into a Dispatcher Phoenix workflow.
 - Use the file size dropdown to specify whether the file should be greater than, less than, equal, greater than or equal, less than or equal, or in between the specified value(s).
 - Enter the file size into the blank field.
 - Specify the file size measurement unit: bytes, KB, MB, GB or TB.
- Filter Modified Date: Check this box to enable filtering of files that have been modified before, after or on a specific date range.
 - Use the file size dropdown to specify whether the file's modified date should be newer than, older than, in between, or equal to the specified date.
 - Use the calendar to select the appropriate date or enter in the date using the following format: MM/DD/YYYY
- Filter Criteria
 - Match any one filter criteria: If one of the filter criteria is met, the file will be collected from the FTP server.
 - Match all filter criteria: If all of the filter criteria are met, the file will be collected from the FTP server.
- 10. Use the **Options** button in the upper-right corner of the FTP Explorer to adjust or configure the folder view.
 - Select **Show Tree View** to view the complete folder structure in a tree view.
 - · Use Show Files to show files within the folder browsing view.
 - Use the New Folder option to create a new folder in the currently selected folder path on the FTP server.
 - Refresh the folder browser tree view in the FTP Explorer.
- 11. The **Folder Path** field below the folder tree will auto-populate when you make your folder selection in the FTP Explorer. If you do not want to navigate the file explorer, you may manually enter the **Folder Path** in the field.
 - Select the check box next to Include Subfolders if Dispatcher Phoenix should also collect files from all of the subfolders located within the folder path.
- 12. Select the **Save** button to keep your FTP In node configuration. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Metadata

The following metadata is created in the FTP In node:

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Metadata Value	Description
{ftpin:count}	The total number of files collected from the FTP server.
{ftpin:filename}	The collected file name.
{ftpin:folder}	The name of the folder on the FTP server that files are collected from.
{ftpin:fullpath}	The full path (including filename) of the FTP file.
{ftpin:host}	The address of the FTP server.
{ftpin:path}	The path to the folder on the FTP server that files are collected from.

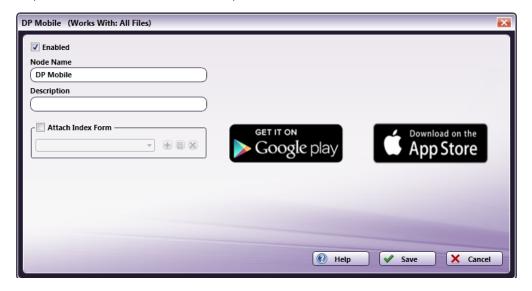
DP Mobile



The DP Mobile input node receives files from the mobile devices via the DP Mobile app. To submit files from your mobile device into Dispatcher Phoenix for processing/routing/printing, you must have at least one Dispatcher Phoenix workflow running that includes a **DP Mobile Input**.

For more information about the app and how to use it, please refer to the Dispatcher Phoenix Mobile User's Guide.

To open the *DP Mobile node* window, add an input node for *DP Mobile* and double-click on it.



- Make sure the **Enabled** box is checked to enable one or more collection points when there are multiple input sources (not needed on a single input source).
- In the **Node Name** field, enter a meaningful name for the DP Mobile node.
- In the **Description** field, enter a description for the DP Mobile node. This is not required, but can be helpful with multiple collection points. If the description is long, you can hover the mouse over the field to read its entire contents.
- Click on the **Google play** button to download the app from Google Play.
- Click on the App Store button to download the app from the App Store.
- Select the **Save** button to keep your DP Mobile input definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Creating a DP Mobile Index Form

If you want to access an index form on your mobile device using the DP Mobile app, you must associate that index form with the DP Mobile input node. Do the following:

- 1. Check the Attach Index Form box.
- 2. Click on the + button.

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- 3. On the Create New Index Form window, select the Blank Index Form button.
- 4. Add the fields that you want to appear on your mobile device. See the Index Form Builder section for more information on how to create an index form

SMTP In



The SMTP In node is an optional node that receives documents that have been scanned and sent as email from an MFP. These emails are then sent along in the workflow as attachments. Unlike other input nodes, the SMTP In node does not store documents; emails are processed once they come in

Before running a workflow that uses an SMTP In node, the SMTP Service must be started.

Note: When the system is under heavy load, performance of external services may be impacted. As such, we recommend that heavy processing be done on a faster system with multiple cores.

SMTP Header Metadata

The following header metadata can be included with the documents and can be used in other nodes, such as the Output Folder node and Email Out node.

Variable	Replaced By
from	The sender's mailbox (not necessarily the sender's email address). The mailbox address is wrapped in angle brackets (e.g., <user@example.com>).</user@example.com>
rcpt	The destination mailbox(es), one per recipient at the time of receipt. This will be set for all of the To, CC, and BCC mailboxes.

Note: To use smtp metadata as a dynamic variable, use the following format: {smtp:variable}. For example: {smtp:from}.

Using this Node

The SMTP In node is typically followed by an Email Parser node to extract the email attachment files for further imaging and printing processing; however, the SMTP In node also works directly with other routing, parsing, and output nodes (e.g., Metadata Routing, Output Folder, Parse & Distribute, Rename, FTP, etc.)

Using the SMTP In node is a multi-step process. You must:

Step #1. Configure your MFP to be used as a source for the SMTP In node

Step #2. Configure your SMTP In node in your workflow

 $\textbf{Step \#3.} \ \mathsf{Make} \ \mathsf{sure} \ \mathsf{that} \ \mathsf{the} \ \mathsf{SMTP} \ \mathsf{Service} \ \mathsf{is} \ \mathsf{running}$

Step #4. Scan your documents to email

Step #1 Configure Your MFP

To begin accepting scanned emails from an MFP into your workflow via the SMTP In node, you must first configure your MFP appropriately.

- 1. Select the **Utility/Counter** key on the MFP panel.
- 2. Press the Administrator Settings button on the Utilities screen. The Password screen will appear, as in the following illustration:

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- 3. Enter the administrative password; then press the **OK** button.
- 4. On the Administrator Settings screen, press the **Network Settings** button. The Network Settings screen will appear. On this screen, you should press the **E-Mail Settings** button (number 8 in the illustration below):



5. The Email Settings screen will now appear. On this screen, press the Email TX (SMTP) button (number 1 in the illustration below):



6. The Email TX screen will now appear. On this screen, press the Forward button (top right corner in the illustration below):

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7. The SMTP Server Address screen will now appear. Input the IP address of your host machine; then press the **OK** button when you are done.

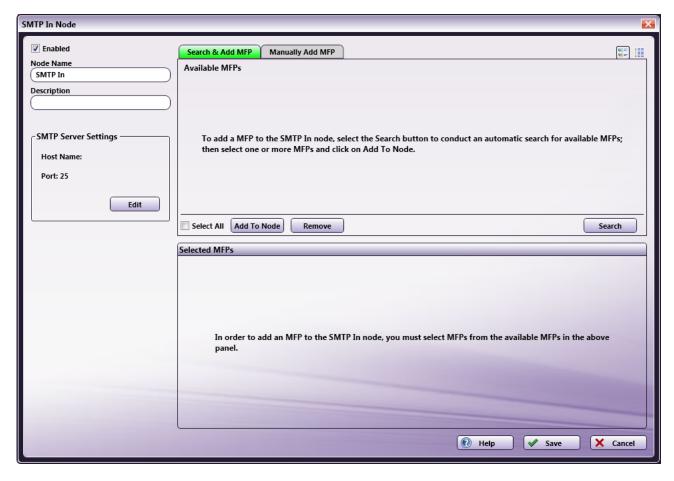


Step #2 Configure The SMTP In Node

To receive emails from an MFP as part of your workflow, drag an SMTP In node into the Workflow Builder canvas; then double-click on the icon to open the **SMTP In** window. Use the *Properties* panel on the right side of the screen to define how the node looks in the workflow, and use the Node Properties window for the actual *SMTP In* definition.

The SMTP In Node resembles the following illustration:

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On the SMTP In node window, do the following:

- Make sure the **Enabled** box is checked. When unchecked, this input will be ignored and documents will not be processed from this input location. If the only input node in the workflow is an SMTP In node, it must be enabled; otherwise, the workflow will not validate.
- In the Node Name field, enter a meaningful name for the "Collect from" node.
- In the **Description** field, enter a description of the SMTP In node. This is not required, but can be helpful with multiple collection points. If the description is too long, you can hover the mouse over the field to read its entire contents.
- The **SMTP Server Settings** area contains the system information for the SMTP server, including the identifying host name for the server and the port used by the server for SMTP communication (default is 25). To change these settings, select the **Edit** button to go to the SMTP Manager window. See the Dispatcher Phoenix User's Guide for more information on the SMTP Manager.
- Specify the MFP(s) that you want used to send emails into the workflow either by discovery using the MFP Explorer tool, or manually. The maximum number of devices that can be added is 100. See the sections below for more information.
- When finished defining this SMTP In collection point, select the **Save** button. You can also select the **Help** button to access online help, and select the **Cancel** button to exit the window without saving any changes.

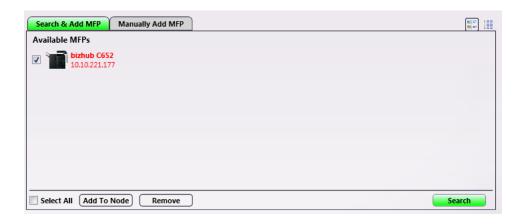
Note: The SMTP In node can only be in one activated workflow. In addition, you can only have one SMTP In node in a workflow, even if the other SMTP In node is disabled.

Search & Add MFP

To use the MFP Explorer tool to find the appropriate MFP device to use with this node, make sure that the **Search & Add MFP** tab is selected; then do the following:

- 1. Under the **Search & Add MFP** tab, select the **Search** button to open up the MFP Explorer. The MFP Explorer will discover MFP devices on the network.
- 2. Once you have selected the correct MFP(s) on the MFP Explorer window, it will appear under the **Available MFPs** area, as in the following illustration:

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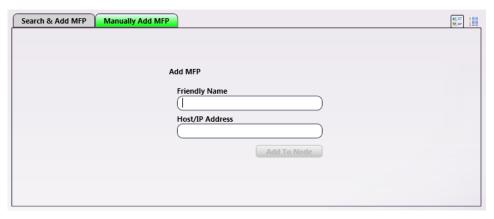
3. To add an MFP to the node, mark the checkbox next to it (or check the **Select All** box); then select the **Add To Node** button. The specified MFP(s) will now appear under the Selected MFPs area, as in the following illustration:



4. To remove an MFP from either the Available MFPs area or Selected MFPs area, mark the checkbox next to the appropriate MFP (or check the **Select All** box); then select the **Remove** button.

Manually Add MFP

If you know the information for a specific MFP that you would like to add to the node, click the **Manually Add MFP** tab.



Do the following:

- 1. In the **Friendly Name** field, enter a distinguishable name for the MFP to be added.
- 2. In the $\mbox{{\bf Host/IP}}$ $\mbox{{\bf Address}}$ field, enter the IP Address for the MFP device.
- 3. Select the **Add To Node** button when you are done.
- 4. Select the **Save** button to add the MFP to the node.

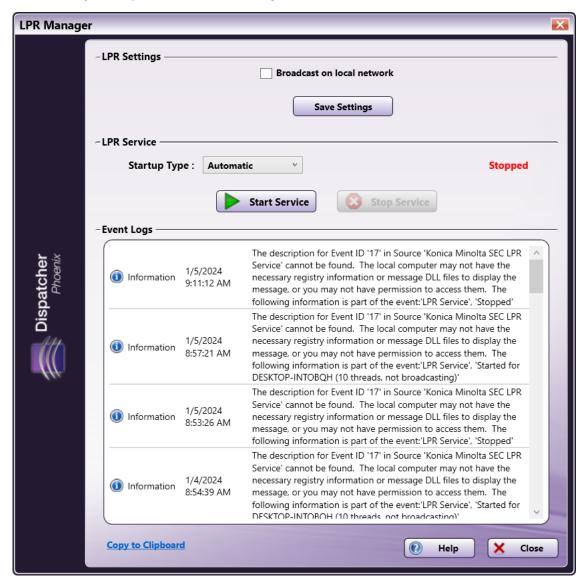
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Step #3 Run SMTP Service

In order for this node to work properly, the SMTP Service must be running. Select the Edit button under the SMTP Server Settings area to bring up the SMTP Manager. On the SMTP Manager, make sure that the **Start Service** button has been selected.

Note: When the SMTP Service is installed separately (after the initial installation of the application), it will not be configured to start automatically. Additional configuration may be necessary before running the SMTP Service successfully.

The SMTP Manager allows you to edit SMTP Service settings.



Note: In order for any changes to take effect, the service must be restarted.

SMTP Settings

- Host Name (optional). Edit the identifying host name for the server here.
- Port: Edit the port used by the server for SMTP communication here.
- Save Settings. Click on this button to save any changes you've made to SMTP settings.

SMTP Service

This section of the SMTP Manager allows you to activate inbound communication with the SMTP Service.

- Startup Type. Select how the SMTP Service should start. These options are in sync with the Windows Services Manager. Options are:
 - Automatic (Delayed Start) The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots). This option is available only on Windows 8 and higher Operating Systems.
 - Automatic The service starts when the system first starts.

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- Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
- Disabled The user is prevented from starting the service at any point.
- Start Service button. Select this button to start the SMTP Service.
- Stop Service button. Select this button to stop the SMTP Service. By default, the SMTP Service will not be running when the application first starts.

Event Logs

This section of the SMTP Manager displays the SMTP Service's event logs.

• Copy to clipboard. Click this link to copy the event logs to the clipboard.

Step # 4 Scan Documents To Email

Now you are ready to scan your document(s), sending as email into your workflow.

Note: Make sure that your workflow is running before beginning this process.

Do the following:

1. Change the mode by selecting the **Fax/Scan** key on the MFP touch panel; then select the **Direct Input** tab to select the destination. The Sending Method screen will appear. On this screen, press the **Email** button:



2. The Enter New Address>Email screen will appear. On this screen, enter the appropriate email address; then press the OK button when you are done. This email address is required even in cases where the only destination is a Dispatcher Phoenix workflow and no actual email is being sent to an email client.



3. Position the document to be emailed; then press the **Start** key on the MFP panel.

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Google Cloud Print



Notice: Dispatcher Phoenix Google Cloud Print Node has been Deprecated

As of January 1, 2021, Google deprecated the Google Cloud Print service. As such, all Dispatcher Phoenix workflows that currently contain the Google Cloud Print node are no longer functional. If you update Dispatcher Phoenix to the current version, all Google Cloud Print nodes in workflows will be replaced with a red, broken puzzle piece, indicating that these nodes are no longer functional. If you choose not to update to the current version, the nodes will appear unchanged in your workflows, but the workflows will not be functional.

HTTP In

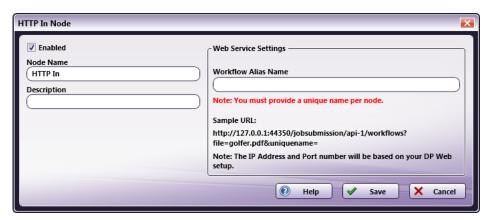


Note: This node works with all format file types.

The **HTTP In Node** receives documents that are uploaded through a web service. This node can run in multiple workflows but each node must have a unique **Workflow Alias Name**. The target workflow to which the documents are submitted is determined by that **Workflow Alias Name**, one of the request parameters specified in the URL. Any type of file may be submitted to this node.

Creating the HTTP In Node

Add the HTTP In Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the HTTP In Node:



- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the HTTP In Node.
- In the **Description** field, enter a description for the HTTP In Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Workflow Alias Name** field, enter a unique name for the HTTP In Node. This is used to identify which workflow needs to run when a file is uploaded.

Note: Only alphanumeric characters and two special characters ("-" and "_") are allowed in this field.

- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

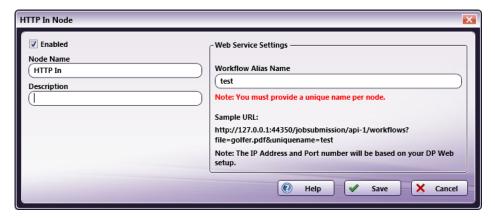
Note: The IP Address and Port number are the same used for the Dispatcher Phoenix Web install.

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Using the HTTP In Node

Use a third-party HTTP job submission application to send jobs to the HTTP In Node. This is done using Dispatcher Phoenix Web's web service.

On the HTTP In Node screen below, a sample URL is noted in the Web Services Settings box:



The sample URL value is the destination where the data (POST) is sent by the HTTP job submission application.

Using the third-party job submission application, specify the URL value (including the target file name and workflow Alias Name) to post the data via HTTP to the HTTP In Node.

The URL format should match the template that follows:

The values of the bracketed components are noted below:

- ipaddress: the IP Address of the server upon which Dispatcher Phoenix Web is running.
- port: the port used by the server upon which Dispatcher Phoenix Web is running.
- filename: the name of the file submitted by the third-party application
- Workflow Alias Name: The Workflow Alias Name value entered in the HTTP In Node settings screen. In the example above, that value is **test**. Set a workflow alias to the data acquisition destination (GET). This value is used as the destination to post the data via HTTP to the HTTP In Node.

Using the third-party application's configuration settings, the URL above is specified. Files may then be submitted to this workflow using this URL. The file is mapped to the workflow using the bracketed values.

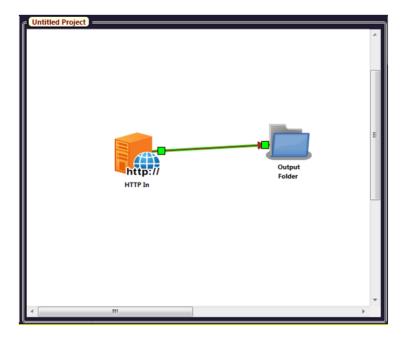
For more details about Web Site hosting on a Web Server, please refer the following: DP Web Hosting Options

Sample of an HTTP In Workflow

Once the HTTP In Node is created and the third-party application is configured with the correct URL information, jobs may then be sent to the workflow.

In the sample workflow, jobs from a third-party application are sent to the HTTP In Node, and then moved to an Output Folder:

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If the URL information entered via the third-party application contains the correct bracketed information for the Dispatcher Phoenix Web's workflow, this workflow will function as noted.

Sample Code for Uploading files

SAMPLE CURL COMMAND LINE CODE

The Curl Command Line code that follows can be used to upload a job using a workflow's HTTP In Node:

```
curl -i -X POST -H "Content-Type: application/pdf" "http://127.0.0.1:44350/jobsubmission/api-1/workflows?file=A4.pdf&uniquename=test" --data-binary "@./sample.pdf"
```

When using Curl Command, you must specify the correct URL as noted in Section Using the Http In Node above.

Use the following link to download the Curl Command Line tool:

https://winampplugins.co.uk/curl/

For more details about this tool, please check the website of any third-party application you use to send HTTP jobs to an HTTP In Node.

SAMPLE JAVA SERVER CODE

The Java Server code that follows can be used to upload a job to a workflow's HTTP In Node:

```
package httpnodes;
import java.io.File;
import java.io.IOException;
import java.io.OutputStream;
import java.io.OutputStreamWriter;
import java.io.PrintWriter;
import java.net.HttpURLConnection;
{\tt import java.net.MalformedURLException;}
import java.net.URL;
import java.net.URLConnection;
import java.nio.file.Files;
public class HttpIn {
                       public\ static\ void\ main(String\ args[])\ throws\ MalformedURLException,\ IOException\{
                                               //Update the URL as per your configuration below.
                                               String \ url = "http://127.0.0.1:44350/jobsubmission/api-1/workflows?file=sample.pdf&uniquename=test"; \\ and but it is a submission of the property of the p
                                               String charset = "UTF-8";
                                               //update the location of your file here.
                                               File sampleFile = new File("C:\\Users\\test.user\\Desktop\\Test\\input\\sample.pdf");
                                               String boundary = Long.toHexString(System.currentTimeMillis());
                                               String CRLF = "\r";
                                               URLConnection connection = new URL(url).openConnection();
                                               connection.setDoOutput(true);
                                               connection.setRequestProperty("Content-Type", "application/pdf; boundary=" + boundary);
```

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SAMPLE PHP SERVER CODE

The PHP Server code that follows can be used to upload a job to a workflow's HTTP In Node:

Note: Dispatcher Phoenix Web Server must be installed to use the HTTP In Node.

Note: The HTTP In Node does not support multiple files in a single request. Submit one file at a time to the node and wait a few seconds before submitting the next file.

IDF Converter



Note: This node works with Zip (JDF+PDF) files.

The **JDF Converter Node** is used to parse information from a JDF file then convert the parsed information into metadata. The node only accepts ZIP files that contain both a JDF and PDF file. Once a ZIP file is submitted, the JDF Converter Node unzips the file, performs the parsing operation, and then saves the job information as metadata. The parsed metadata information and PDF are then sent to the next node in the workflow.

It is recommended that the JDF submitted to the node be in AccurioPro Conductor's JDF format. If the input JDF file is not in the recommended format, the JDF Converter Node converts the input file into the correct JDF format and parses the file.

Note: This Help file contains detailed information about supported Job Ticket Metadata and the JDF XPaths and Value Ranges. Refer to **Job Ticket Metadata**.

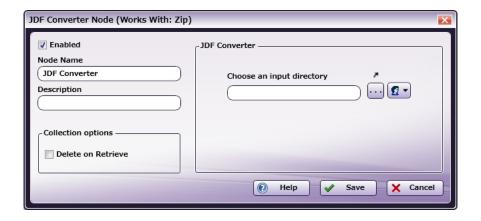
Currently, the JDF Converter Node supports the following third-party applications:

- · Agfa Apogee
- Screen EQUIOS

Using the JDF Converter Node

Add the JDF Converter Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the JDF Converter Node's window:

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- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the JDF Converter Node.
- In the **Description** field, enter a description for the JDF Converter Node. Although this is not required, it can be helpful to distinguish between multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Collection options panel, check the Delete on Retrieve checkbox to delete the input files from the input location.
- In the **JDF Converter** panel, the **Choose an Input directory** field displays the pathway to the ZIP files that will be submitted to the JDF Converter Node.
- Click the **ellipsis** button (...) to browse to and select an input location.
- Click the **Network Credentials** button (to add or clear the network credentials so that the Node can connect to the specified Input Directory.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

JDF Converter Metadata

Once the JDF Converter Node is added to a workflow, an entry named **Job Ticket** is shown in the Metadata Browser.

The syntax for the Job Ticket is {job:name of job ticket attribute}. Use the Metadata Browser window (as show in the screen capture below) to choose a Job Ticket variable:

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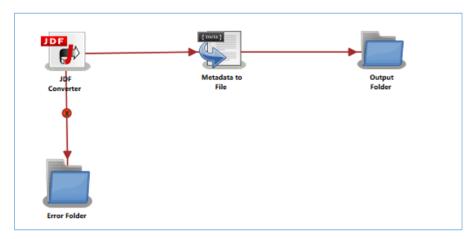


Note: This Help file contains detailed information about supported Job Ticket Metadata and the JDF XPaths and Value Ranges. Refer to **Job Ticket Metadata**.

Sample of a JDF Converter Workflow

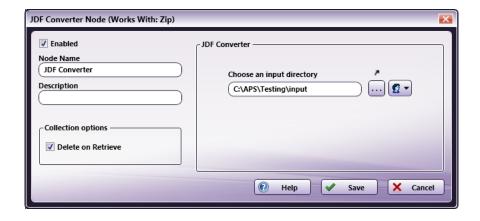
The purpose of this workflow is to parse the information in a JDF file, write the parsed information as metadata, and then send it to the **Output Folder**.

A detailed explanation of each node in the workflow below follows:



JDF Converter Node: Configure the node to collect zip files that contain PDF and JDF files. If a collected ZIP file is invalid, the file is moved to the **Error Folder**. All collected ZIP files are deleted from the configured path when the **Delete on Retrieve** checkbox is selected:

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When a file is sent to the JDF Converter Node, the Author Name is mandatory and must be included in the input JDF file's metadata.

Below is a sample JDF file that contains the Author Name. Use the following path to locate the JDF file:

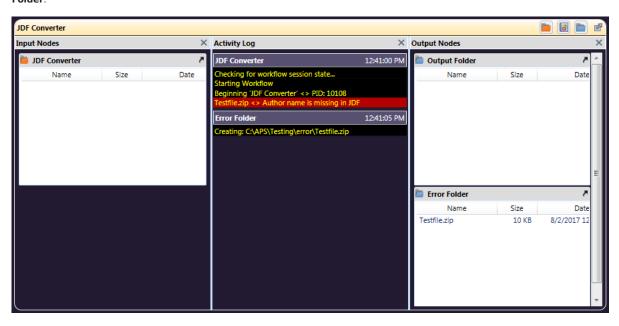
• /JDF/AuditPool/Created@AgentName XPath

```
<?xml version="1.0" encoding="UTF-8"?>
        <JDF Activation="Active" Category="DigitalPrinting"</pre>
        CommentURL="http://127.0.0.1" ICSVersions="IDP_L1-1.0 Base_L3-1.0"
        ID="n170802_114943875_000137" JobID="001"
        JobPartID="170802_114943875_000138" MaxVersion="1.3"
        SettingsPolicy="BestEffort" Status="Ready" Type="Combined"
        Types="LayoutPreparation Imposition Interpreting Rendering DigitalPrinting"
        Version="1.2" xmlns="http://www.CIP4.org/JDFSchema_1_1"
        xmlns:kmbs="http://www.konicaminolta.com/KMBS_JDFExtension_1_1"
        xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="Combined">
        <Comment/>
        <ResourcePool>
                <Media Class="Consumable" Dimension="612 792"
                        ID="r170802_114943875_000139" MediaColorName="Yellow" Status="Available">
                        <Location LocationName="AutoSelect"/>
                </Media>
                <LayoutPreparationParams Class="Parameter"</pre>
                        ID="r170802_114943875_000140" Sides="OneSidedFront" Status="Available"/>
                <RunList Class="Parameter" ID="r170802_114943876_000141" NPage="4" Status="Available">
                        <LavoutElement>
                        <FileSpec URL="Testfile.pdf"/>
                        </LayoutElement>
                <InterpretingParams Class="Parameter" ID="r170802_114943876_000142"</pre>
                        PrintQuality="Normal" Status="Available"
                      kmbs:EnableStrokeAdjust="False" kmbs:UseCIEColor="False" kmbs:UseDeviceToneCurve="False">
                        <ObjectResolution NoOp="true"/>
                </InterpretingParams>
                <RenderingParams Class="Parameter" ID="r170802_114943876_000143" Status="Available"/>
                <DigitalPrintingParams Class="Parameter" Collate="Sheet"</pre>
                         ID="r170802_114943877_000144" OutputBin="SystemSpecified"
                        PageDelivery="SameOrderFaceDown" Status="Available"
                         kmbs:ExternalFinisherInlineMode="false" kmbs:GlossMode="False">
                        <MediaRef rRef="r170802_114943875_000139"/>
                </DigitalPrintingParams>
                <Component Class="Quantity" ComponentType="FinalProduct"</pre>
                        ID="r170802_114943877_000145" Status="Unavailable"/>
                <kmbs:UserAuthentication kmbs:AuthenticationType="Public"/>
                <DensityMeasuringField Center="0 0" Class="Parameter" Density="0"</pre>
                        DescriptiveName="PGPrintDensity=Level6" Diameter="0" DotGain="0"
                        ID="r170802_114943880_000147" Percentage="0" Screen="'
                        Separation="" Status="Unavailable" ToleranceBlack="0 0"
                        ToleranceCyan="0 0" ToleranceDotGain="0 0" ToleranceMagenta="0 0" ToleranceYellow="0 0"/>
                <ColorantControl Class="Parameter" ID="r170802_114943880_000148"</pre>
                        ProcessColorModel="DeviceCMYK" Status="Available"/>
                <Component Class="Quantity" ComponentType="PartialProduct"</pre>
                        ID="r170802 114943880 000149" Status="Available"/>
                <kmbs:ImageQuality kmbs:ColorMode="BW"/>
        </ResourcePool>
        <ResourceLinkPool>
                <MediaLink CombinedProcessIndex="0" Usage="Input" rRef="r170802_114943875_000139"/>
                <LayoutPreparationParamsLink CombinedProcessIndex="0" Usage="Input" rRef="r170802_114943875_000140"/>
                <RunListLink CombinedProcessIndex="0 1" ProcessUsage="Document"</pre>
                        Usage="Input" rRef="r170802_114943876_000141"/>
```

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```
<InterpretingParamsLink CombinedProcessIndex="2" Usage="Input" rRef="r170802_114943876_000142"/>
                <RenderingParamsLink CombinedProcessIndex="3" Usage="Input" rRef="r170802_114943876_000143"/>
                <DigitalPrintingParamsLink CombinedProcessIndex="4" Usage="Input" rRef="r170802_114943877_000144"/>
                <ComponentLink Amount="3" CombinedProcessIndex="4" Usage="Output" rRef="r170802_114943877_000145"/>
                <DensityMeasuringFieldLink CombinedProcessIndex="2" Usage="Input" rRef="r170802_114943880_000147"/>
                <ColorantControlLink CombinedProcessIndex="4" Usage="Input" rRef="r170802_114943880_000148"/>
        </ResourceLinkPool>
        <AuditPool>
                <Created AgentName="AccurioPro Conductor" AgentVersion="1.0"</pre>
                        ID="a170802_114943878_000146" TimeStamp="2017-08-02T11:49:43-07:00"/>
        </AuditPool>
        <NodeInfo JobPriority="50" TargetRoute="" kmbs:DeviceIPAddress="Noset"</pre>
                kmbs:DeviceType="GENERIC" kmbs:DocRoute="" kmbs:EXPORT="true"/>
        <CustomerInfo BillingCode="" CustomerID="" CustomerJobName="Testfile.pdf">
                <Contact ContactTypes="Customer">
                        <Address City="" Country="" PostalCode="" Region="" Street=""/>
                        <Person FamilyName="" FirstName=""/>
                        <ComChannel ChannelType="Phone" Locator=""/>
                        <ComChannel ChannelType="Email" Locator=""/>
                        <ComChannel ChannelType="Fax" Locator=""/>
                        <Company OrganizationName=""/>
                </Contact>
        </CustomerInfo>
</JDF>
```

If the **Author Name** is not included, the node displays an error message in the **Activity Log** of the workflow and the file is moved to the **Error**



Use this process to create a zip file to submit to the JDF Converter node:

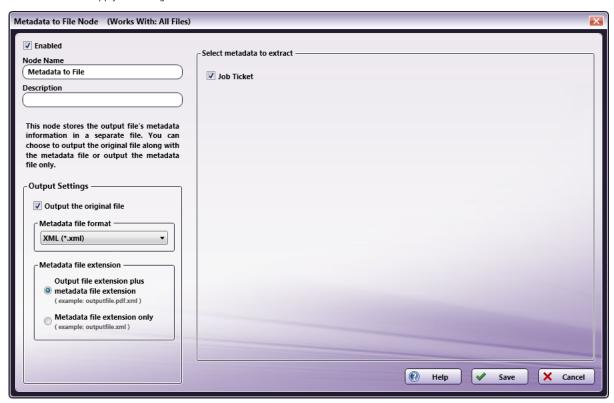
- 1. Using a text editor, copy the sample JDF file noted above.
- ${\it 2. Update the input PDF file name and number of pages in the PDF file at the following XPaths:}\\$
 - ${}_{\circ}\ \ /JDF/ResourcePool/RunList/LayoutElement/FileSpec/@URL ->\ PDF\ file\ Name}$
 - /JDF/ResourcePool/RunList/@NPage -> Number of pages in PDF file
- 3. Save the file locally as jdf_converter.jdf.
- 4. Zip together the saved JDF file and the test PDF file referenced in Step 3 above.

Metadata to File Node: This node extracts the configured metadata, saves it as an XML file, and then sends the file to the next node in the workflow. Follow these steps to configure the Metadata to File Node:

- 1. Open the Metadata to File Node by double-clicking the node's icon.
- 2. Make sure the **Enabled** checkbox is selected.
- 3. In the Output Settings panel, select the Output the original file checkbox, and then select XML (*.xml) from the Metadata file format drop-down.
- 4. In the Metadata file extension panel, select the Output File extension plus metadata file extension radio button.
- 5. In the **Select metadata to extract** panel, select the **Job Ticket** checkbox.

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6. Click Save to apply the changes.



Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<file size="19497" ctime="0" mtime="1501700034">
        <meta group="job" name="audit.agentname">
                <document>AccurioPro Conductor</document>
        <meta group="job" name="audit.agentversion">
               <document>1.0</document>
        </meta>
        <meta group="job" name="audit.timestamp">
                <document>2017-08-02T11:49:43-07:00</document>
        </meta>
        <meta group="job" name="collate">
                <document>ON</document>
        </meta>
        <meta group="job" name="colormode">
                <document>Color</document>
        </meta>
        <meta group="job" name="colormode.hq">
               <document>OFF</document>
        </meta>
        <meta group="job" name="copy">
               <document>3</document>
        <meta group="job" name="customer.commentURL">
                <document>http://127.0.0.1</document>
        </meta>
        <meta group="job" name="file.URL">
                <document>Testfile.pdf</document>
        </meta>
        <meta group="job" name="name">
                <document>Testfile.pdf</document>
        <meta group="job" name="offset">
               <document>OFF</document>
        </meta>
        <meta group="job" name="orientation">
               <document>Portrait</document>
        </meta>
        <meta group="job" name="paper.color">
                <document>Yellow</document>
```

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```
<meta group="job" name="paper.h">
                                                                                  <document>792</document>
                                         </meta>
                                         <meta group="job" name="paper.holetype">
                                                                                  <document>OFF</document>
                                         </meta>
                                         <meta group="job" name="paper.source">
                                                                                  <document>Auto</document>
                                         <meta group="job" name="paper.w">
                                                                                 <document>612</document>
                                         </meta>
                                         <meta group="job" name="pps">
                                                                                 <document>OFF</document>
                                         <meta group="job" name="printtype">
                                                                                  <document>One-Sided</document>
                                         <meta group="job" name="priority">
                                                                                  <document>Normal</document>
                                         </meta>
                                         <meta group="job" name="ringbinding">
                                                                                  <document>OFF</document>
                                         </meta>
                                         <meta group="job" name="ticket.file">
                                                                                 < document > C: \Pr{oran Data \setminus Konica Minolta \setminus conopsd \setminus var \mid blox \mid ode 2 \mid tmp.d \mid 00000Y \mid export 1501699783878 \mid 2.jdf < / document > C: \Pr{oran Data \mid blox 
</file>
```

Dispatcher Stratus In



The **Dispatcher Stratus In** node allows your Dispatcher Phoenix installation to collect documents and data from your Dispatcher Stratus tenant and associated **Dispatcher Phoenix Connector**. This allows you to combine the people-based workflow capabilities of Dispatcher Stratus with the powerful document processing capabilities of Dispatcher Phoenix.

Note: To use the Dispatcher Stratus In node, you must have a configured Dispatcher Stratus tenant (https://dispatcherstratus.com/).

Important! The Dispatcher Stratus In node automatically deletes documents from the Dispatcher Stratus repository after collection to prevent duplicate processing.

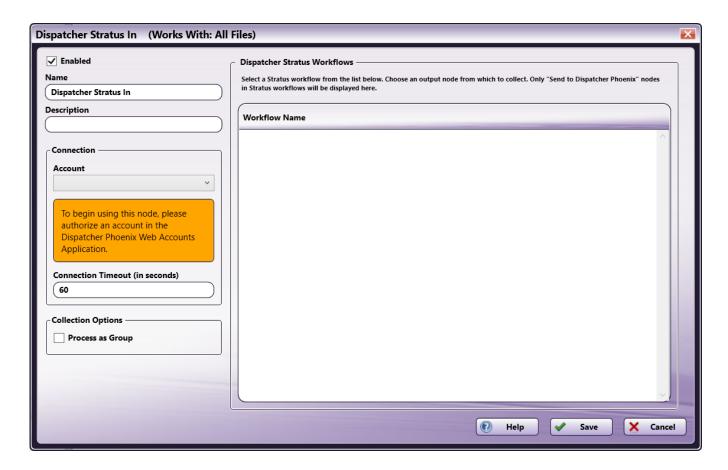
To open the **Dispatcher Stratus In** node's configuration window, drag and drop the node onto your workflow canvas and double-click on it.

Adding Your Dispatcher Stratus Account

To utilize the Dispatcher Stratus In node, the user must first add the Dispatcher Stratus tenant to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix Web Accounts** page.

Configuring the Dispatcher Stratus In Node

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- **Enabled** To enable this node in the current workflow, check the box at this field. When unchecked, this input will be ignored. While the workflow will still validate if there is at least one enabled collection node, documents will not be collected by this node if the **Enabled** box is unchecked.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

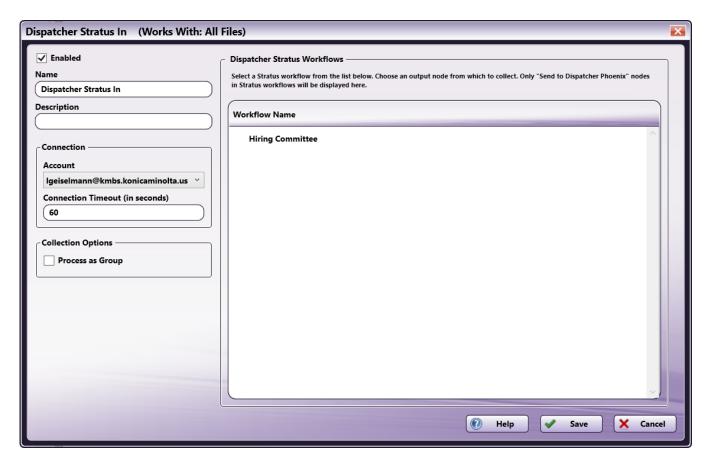
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node configuration and exit the window, click this button.

Connecting to Dispatcher Stratus

To connect to Dispatcher Stratus, do the following:

1. In the Connection area, select a Dispatcher Stratus account and tenant from the dropdown.

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Note: If you have not already set up a Dispatcher Stratus account through **Dispatcher Phoenix Web**, you must do this before it will appear in the dropdown.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Collection Options

In the **Collection option** section, you have the following options:

• **Process as group** - To process files from the selected workflow and Send to Dispatcher Phoenix node as a group, check this box. To process files individually, leave the box blank. By default, this option is not selected.

Application Setup

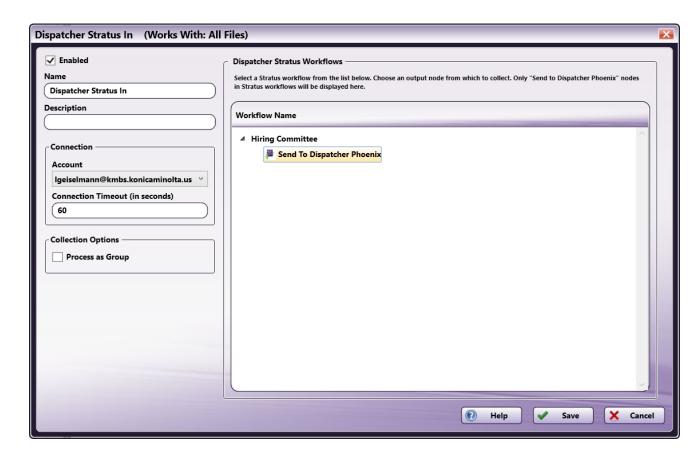
To configure the ${\bf Dispatcher\ Stratus\ In}$ node, do the following:

1. In the Workflow Name area, select the name of the workflow you would like to collect documents and data from.

Note: The Dispatcher Stratus In node will only display workflows that have a "Send to Dispatcher Phoenix" node.

2. After selecting the workflow name, all the available "Send to Dispatcher Phoenix" nodes available in that workflow will appear below. Select the one you would like associated with this Dispatcher Stratus In node.

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3. Select the **Save** button to keep your node configuration.

Metadata

The Dispatcher Stratus In node does not produce any metadata of its own. However it does pass along any metadata it recieves from Dispatcher Stratus. This metadata can be used by any node that can use metadata, but is not available in the Metadata Browser.

Important! Any metadata that passes through the Dispatcher Stratus In node is available in Dispatcher Phoenix, but must be entered manually.

Metadata Format

Metadata that contains a page number is in the following format:

 $\label{eq:file:META_GROUP>["<META_NAME>"][<PAGE_NUMBER - 1>].value} % \[\] $$ (ABC - 1) = (ABC - 1)$

Metadata that does not contain a page number is in the following format:

{file:<META_GROUP>.<META_NAME>}

Email In



The **Email In** node actively monitors incoming and existing emails from folders on an email server. Emails can be dynamically filtered by a variety of fields including To, From, CC, bcc, Date, Size, Body, Subject and Header data to ensure that Dispatcher Phoenix is collecting the content that needs to be processed within the workflow. Currently, the Email In node supports the IMAP protocol which must be enabled for the email server being monitored in the workflow.

Note: Dispatcher Phoenix connects with a variety of email servers. You will need to enable IMAP for your server and configure an app password for servers, such as Gmail, that require two-factor authentication. Some email clients may slow your connection down depending on network usage.

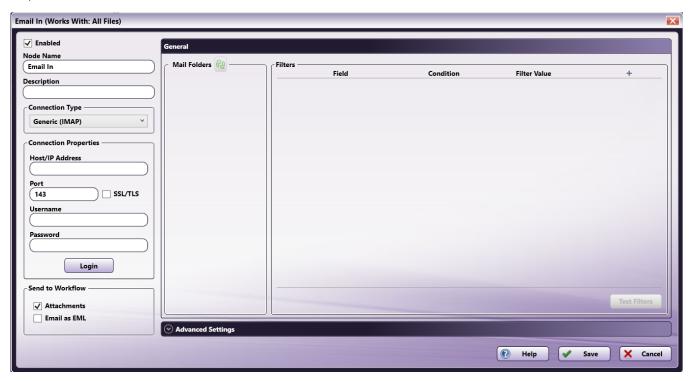
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Important! When upgrading from Dispatcher 8.6 or older to Dispatcher Phoenix 8.7 or newer, any workflows using an **Email In** node will need to have that node and any associated Index Forms replaced and configured before those workflows can be restarted.

Important! Beginning on June 3, 2024, Google will begin to forcibly expire all third-party access to GMail accounts every 6 months. In order to ensure continued access to Google Mail in Dispatcher Phoenix, users will need to log in to **DP Web**, then remove and re-add their Google Mail accounts. If they don't, Dispatcher Phoenix workflows that use the Email In or **Email Out** nodes to access Google Mail accounts will stop working.

Using the Email In Node

To open the Email In node, add an Email In collection node to the workflow and double-click on it.



There are several buttons and fields that appear, including:

- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

To use the **Email In** node, do the following:

- 1. Double-click the **Email In** node to open it.
- 2. In the **Connection Type** area, select an option from the dropdown.

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Notes:

- You must set up a Microsoft Exchange Online account or Google Mail account through Dispatcher Phoenix Web before it will appear in the dropdown.
- The Microsoft Exchange Online function works for both the Microsoft Exchange Online and Outlook.com email services.
- 3. If using the Microsoft Exchange Online or Google Mail connection, select the desired account from the dropdown.

If using the Generic (IMAP) connection, enter the system information for the email server:

- In the Host/IP Address field, enter the identifying host name for this server or its IP address.
- In the Port field, enter the port used by the server for the email server (default is 143).
- Check the SSL/TLS box to enable SSL or TLS security protocols.
- In the **Username** field, enter the user name needed to connect to the email server.
- In the **Password** field, enter the password needed to successfully log in to the email server (for Gmail users, this is your app password that is configured within your accounts security settings).
- Click the **Login** button to test the connection with the email server.

Note: To avoid temporarily locking yourself out of your Gmail account, don't exceed 2500 MB per day for IMAP downloads. Google recommends that if you're setting up a single IMAP account on multiple computers, wait for some time between each setup.

- 4. In the **Send to Workflow** area, do the following:
 - · Check the Attachments box to collect and process any attachments from an email through the workflow.
 - · Check the Email as EML box to send the contents of an email as an EML file through the workflow.
- 5. The **General** section will auto-populate with your Mail Folders once you have successfully completed the **IMAP Connection Properties** section. You can use the refresh button to repopulate the Mail Folders at any time.
 - In the Mail Folders area, select the folder(s) from which emails should be collected.
 - In the **Filters** area, select the criteria needed for the system to identify and collect all emails relevant to the workflow. To add a filter, use the + button in the upper right-hand corner. **Click here** for more information on creating and using filters.
- 6. The **Advanced Settings** section allows you to customize the actions taken by the email server once the email has been collected as well as specify which metadata should be extracted from emails.
 - Under After Collection, select the actions, if any, that should be taken when an email is collected by Dispatcher Phoenix. Options are:
 - Process as group Use this option to process emails in groups of 500 or less.
 - Mark as read Mark the email as read on the email server.

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- **Delete email from server** For Microsoft Exchange, emails are deleted, but are still accessible from within the Microsoft Exchange client. For Google Mail, emails are deleted, but are still accessible from this node and from within the Google Mail client. If the workflow is unexpectedly stopped, you may lose emails.
- Move to mail folder Select the folder where the email should be stored once it has been collected from the email server and
 processed through the workflow.
- Under Connection Timeout Setting, specify the number of seconds before a network connection times out (i.e., login or logout operations).
- Under Metadata Extraction, indicate what metadata should be extracted from an email that is collected by the Email In node.
- 7. Select the **Save** button to keep your Email In configuration. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Filter Logic

Emails collected into a Dispatcher Phoenix workflow with Email In can be filtered by the following fields:

Field	Description
Attachment Name	The name of each individual email attachment.
Attachment Size	The size of each individual email attachment.
Attachments	The presence of attachments in an email (i.e., has attachments or doesn't have attachments).
Bcc Address	The list of addresses that are blind carbon copied.
Body	The content included in the body of the email.
Cc Address	The list of addresses that are carbon copied.
Date	The time period in which the email was sent or received.
Email Size	The total size of the email including attachments.
From Address	The email address of the account that the email was sent from.
Headers	The header content of an email. At least one element of the header must match a filter value.
Read	The status of the email (i.e., read or unread).
Subject	The subject line of the email.
To Address	The recipient address of the email.
Total Attachment Size	The total size of all of the attachments included on an email.

For fields with customizable content, a variable Condition and Filter Value can be specified. Options for Conditions may include:

- Contains
- Doesn't Contain
- Ends With
- Is
- Regular Expression
- Starts With

After adding more than one filter to the node, you can define filter logic. For example, your node may include the following two filter conditions:

- 1. Subject contains: "Form"
- 2. From Address contains: "@company.com"

By default, the **AND** filter logic will be applied to these two filters. This means that any emails in your designated folder which have a subject that contains the word "Form" and that are from a person with an @company.com email address will be automatically pulled into the workflow.

Note: Filter values are not case sensitive.

In some cases, you may need to find emails by sender **OR** the subject of the email. In this case, you would change the filter logic selection to **OR**.

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Consecutive AND filters create a group of conditions while an OR separates filters from one another. For example:

(Filter 1 AND Filter 2) OR (Filter 3) OR (Filter 4 and Filter 5)



Metadata

The following metadata is created in the Email In node:

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Metadata Value	Description
{emailin:attachment_sizes}	A list of the size of each attachment with the email.
{emailin:bcc}	The list of addresses that are blind carbon copied.
{emailin:body}	The contents of the email body.
{emailin:cc}	The list of addresses that are carbon copied.
{emailin:date}	The sent or received date of the email.
{emailin:folder}	The folder an email was collected from.
{emailin:from}	The sender address of the email.
{emailin:headers}	Header's internal email metadata, such as IP addresses and encoding types.
{emailin:host}	The Host/IP Email Server address.
{emailin:subject}	The subject line of the email.
{emailin:to}	The recipient address of the email.
{emailin:total_attachment_size}	The total size of all attachments within the email.
{emailin:username}	The email address of the account that emails are collected from.

Microsoft Teams In



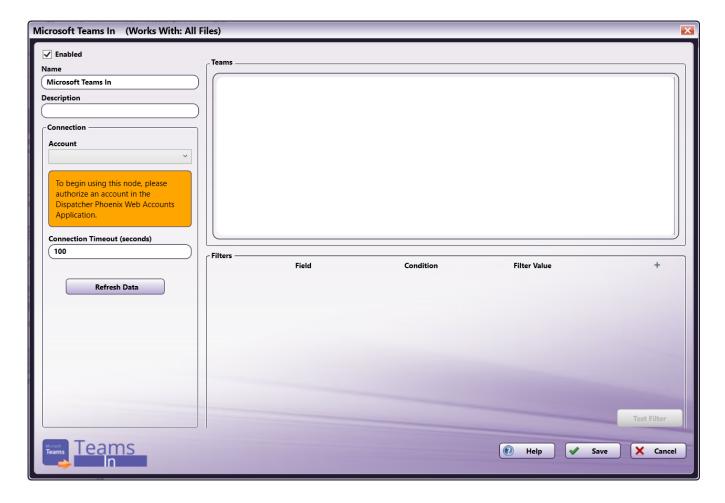
The **Microsoft Teams In** node actively monitors incoming messages and attachments from the connected Microsoft Teams account. Messages can be dynamically filtered by a variety of methods to ensure that Dispatcher Phoenix is collecting the content that needs to be processed within the workflow.

Adding Your Microsoft Teams Account

To utilize the Microsoft Teams In node, the user must first add the Microsoft Teams account to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix Web Accounts** page.

Configuring the Microsoft Teams In Node

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- Enabled To enable this node in the current workflow, check the box at this field. When unchecked, this input will be ignored. While the workflow will still validate if there is at least one enabled collection node, documents will not be collected by this node if the Enabled box is unchecked.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- ${\bf Save}$ To preserve your node configuration and exit the window, click this button.

Connection Setup

In the Connection area:

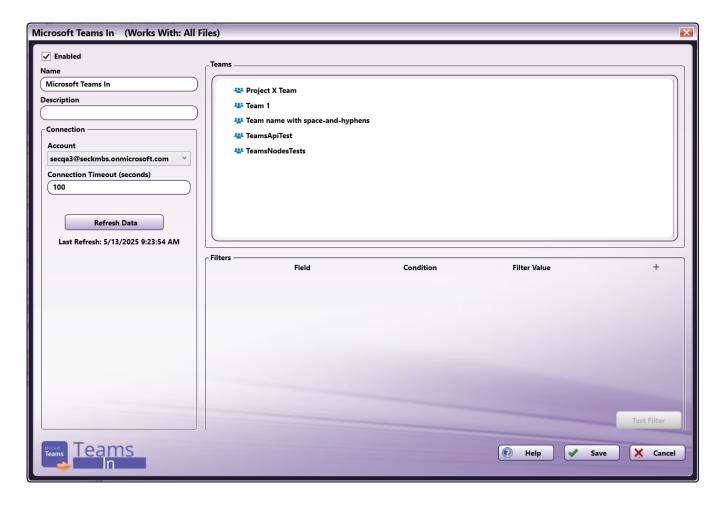
- Account Click the drop-down to see a list of authorized Microsoft Teams accounts. If no accounts appear, be sure the logon user accounts for Dispatcher Phoenix Web and Microsoft Teams must match.
- Connection timeout (in seconds) Specify the number of seconds you want to elapse before a network connection times out (i.e., for login or logout operations).
- Refresh Data Selecting this button will send a new request to Microsoft Teams to retrieve any updated teams and channels of the currently selected account.

Connecting to Microsoft Teams

To connect to Microsoft Teams, do the following:

1. In the Connection area, select a Teams account from the dropdown.

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Note: If you have not already set up a Teams account through Dispatcher Phoenix Web, you must do this before it will appear in the dropdown.

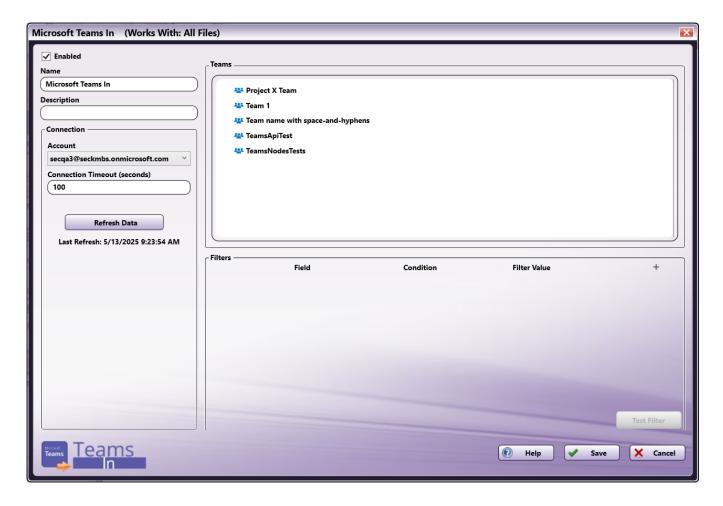
To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Node Configuration

To begin sending messages, do the following:

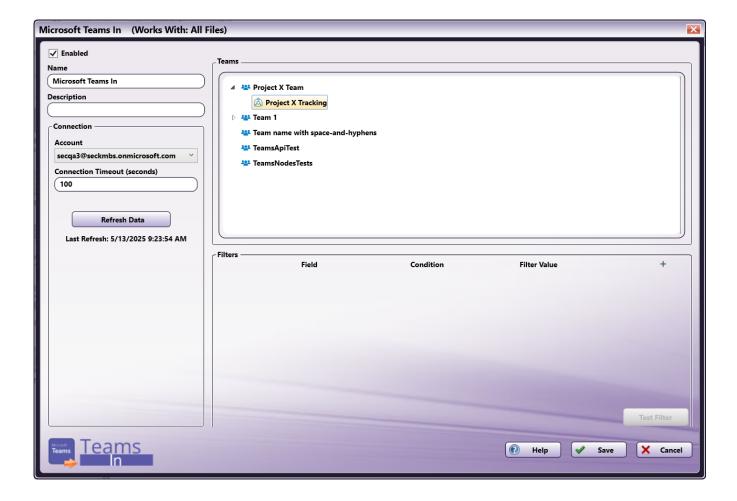
1. In the Teams area, select one of the available teams. This will show the available channels within that team.

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2. Select one of the available channels.

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Filters

To add one or more limits to the node, do the following:

- 1. In the **Filters** area, use the + button in the upper right corner to add a rule. You can add multiple filters this way. Each new filter is added at the end of the list. Each filter also has a + button; selecting this button inserts a new filter directly under the selected filter.
- 2. Select the Field and Condition. If necessary, enter a Filter Value.

Filter Logic

Messages collected into a Dispatcher Phoenix workflow with the Microsoft Teams In node can be filtered by the following fields:

Field	Description
Sender Name	The user account that sent the message.
Sender Email	The email address of the user who sent the message.
Subject	The subject line of the message.
Message	The content included in the message.
Attachment Name	The name of each individual message attachment.
Attachment Size	The size of each individual message attachment.
Total Attachment Size	The size of the message attachments added together.
Date	The time period in which the message was received.

For fields with customizable content, a variable Condition and Filter Value can be specified. Options for Conditions may include:

- Contains
- Doesn't Contain

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- Is
- Starts With
- Ends With
- Regular Expression

For fields that expect numbers, options for Conditions may include:

- Less than
- Greater than
- Equal to

In addition, you can configure the data unit. Options include:

- Bytes
- KB (Kilobytes)
- MB (Megabytes)

The Date field will search all Teams messages in the selected date range and all messages received in that Team going forward. Options include:

- Within 1 day
- · Within 3 days
- Within 1 week
- · Within 2 weeks
- Within 1 month
- Within 2 months
- Within 6 months
- · Within 1 year

Important! If you do not configure a Date filter, the workflow will only collect messages from the moment the workflow is started, not any past messages. If you would like to collect past messages, you must include a Date filter.

Using Multiple Filters

After adding more than one filter to the node, you can define filter logic. For example, your node may include the following two filter conditions:

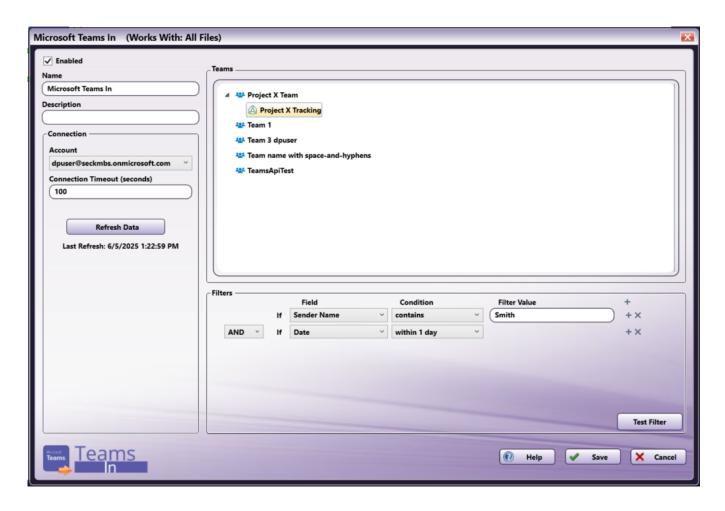
- 1. Subject contains: "Form"
- 2. Message starts with: "Project X"

By default, the **AND** filter logic will be applied to these two filters. This means that any messages that have a subject that contains the word "Form" and that have a message starting with "Project X" will be automatically pulled into the workflow.

Note: Filter values are not case sensitive.

In some cases, you may need to find messages by one criteria OR another. In this case, you would change the filter logic selection to OR.

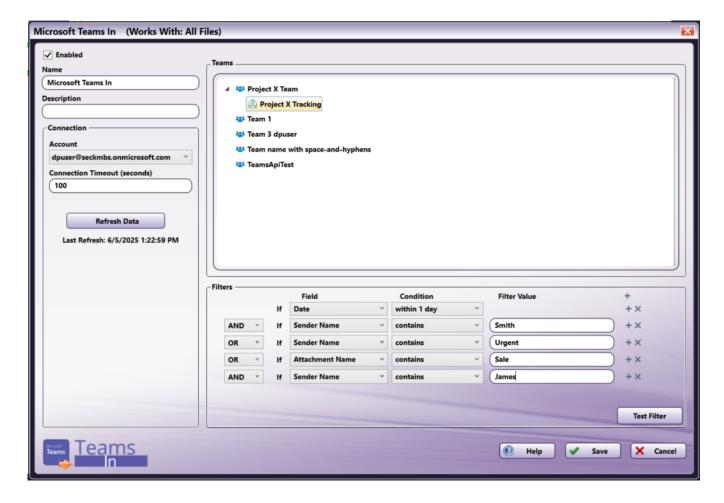
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Consecutive **AND** filters create a group of conditions while an **OR** separates filters from one another. For example:

(Filter 1 AND Filter 2) OR (Filter 3) OR (Filter 4 and Filter 5)

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Important!

- It is a best practice to organize Teams and Channels with unique names to avoid confusion when using Microsoft Teams and the Microsoft Teams In node; attempting to receive messages and documents to Teams or Channels with identical names can produce unexpected outcomes.
- The Teams In node may experience errors with Team or Channel names longer than 240 characters.

Metadata

The following metadata is created in the Microsoft Teams In node:

Metadata Value	Description
{Teams:channelid}	The ID value of the channel.
{Teams:channelname}	The name of the channel.
{Teams:datetime}	The date and time the message was received.
{Teams:emailaddress}	The email address associated with the sender.
{Teams:emailname}	The name associated with the sender.
{Teams:filename}	The name of the attachment.
{Teams:message}	The contents of the message.
{Teams:subject}	The subject line of the message.
{Teams:teamid}	The ID value of the team.
{Teams:teamname}	The name of the team.

Dropbox In

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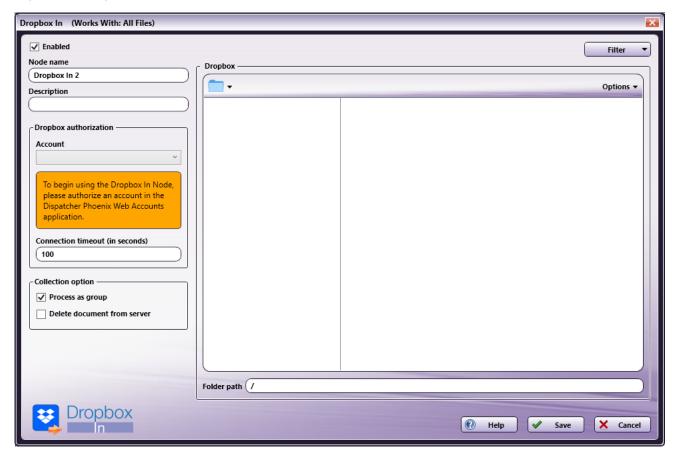
Use the **Dropbox In** collection node to connect to a Dropbox account, including a Dropbox Business Standard or Advanced account, to monitor the configured folder for new files at regular intervals. Dropbox is a file hosting service that offers Cloud storage and file synchronization.

Dropbox In supports Personal, Team, and Shared folders, and can filter files by name, size, or modified date prior to passing documents along a workflow for processing and routing.

Note: To use the Dropbox In node, you must first set up your Dropbox Account in Dispatcher Phoenix Web.

Configuring the Dropbox In Node

To open the Dropbox In node, drag-drop a Dropbox In node from the Collect panel to the workflow and then double-click on it. The Dropbox In Properties window opens.



The following options are available:

- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- $\mbox{\bf Save}$ To preserve your node definition and exit the window, click this button.

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• Cancel - To exit the window without saving any changes, click this button.

Dropbox Authorization

In the **Dropbox authorization** area:

- Account Click the drop-down to see a list of authorized Dropbox accounts. Select the Dropbox account containing the documents or folders you want the workflow to collect. If no accounts appear, be sure the Dispatcher Phoenix Web logon user account used to authorize the Dropbox account is the same as the current Dispatcher Phoenix logon user account. The logon user accounts must match for any Dropbox accounts to appear in Dispatcher Phoenix.
- Connection timeout (in seconds) Specify the number of seconds you want to elapse before a network connection times out (i.e., for login or logout operations).

Collection Option

In the Collection option section, you have the following options:

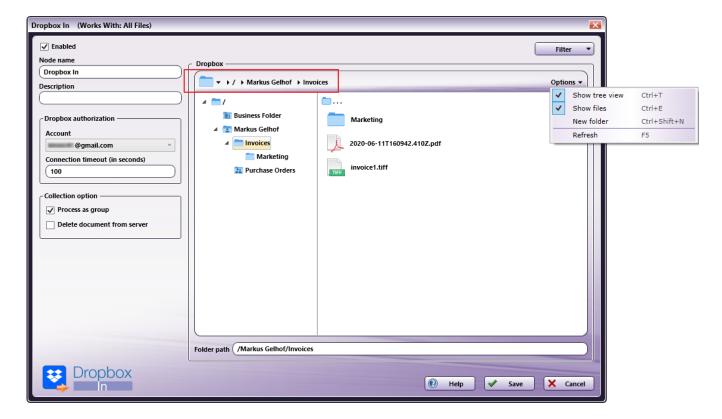
- Process as group To process files from the selected folder as a group, check this box. To process files individually, leave the box blank.
- Delete document from server To delete files from the Dropbox server on collection, check this box. Otherwise, leave the box blank.

Dropbox Explorer Area

Once the connection with Dropbox has been established, the **Dropbox** Explorer area populates with the folder structure of the selected Dropbox account. Select the Dropbox folder you want Dispatcher Phoenix to monitor.

The current folder path displays next to the folder icon at the top of the Dropbox area . You can use this folder path to navigate back through your folder structure. The **Folder Path** field below the explorer area also displays the current path.

In the following illustration, the folder path displays and the Dropbox area shows the Tree view as well as the files in the selected folder, as per the current selections from the Options menu:



Folder Types

The following folder types may appear in the Dropbox Explorer area, depending on your Dropbox version:

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Dropbox Team Member folder



Dropbox Shared folder

Filter

Use the **Filter** drop-down in the upper-right corner of the Properties window to specify the conditions, if any, for collecting files. For any filters you apply, the workflow collects only files from Dropbox that meet the specified criteria.

- Filter file name To filter files based on a specified file name, check the box. The following fields activate:
 - **File name** Enter the complete file name, including the file extension, that you want Dispatcher Phoenix to collect from Dropbox. You can use wildcards in the name you enter. For example entering *.jpg will return all files with an extension of "jpg".
 - Regular expression To dynamically filter files using a pattern describing a certain amount of text, check this box. Note that if you select this option, the Match case checkbox inactivates.
 - Match case If your search is case-sensitive, check this box. Note that if you select this option, the **Regular Expression** checkbox inactivates.
- Filter file size To filter files based on file size, check this box. If you check the box at this field, the following options activate:
 - File size Filter files relative to the size specified below. Select one of the following conditions:
 - Greater than
 - Less than
 - Equal
 - Greater than or equal
 - Less than or equal
 - in between (specify the low and high values in the range)

Specify a file size, and then specify the file size measurement unit. You have the following options:

- Bytes
- KB
- MB
- GB
- TB
- Filter file modified date To filter files based on the modified date, check the box at this field. The following fields activate:
 - File Date Filter files relative to the date specified below. Select one of the following conditions:
 - newer than
 - older than
 - in between (specify the low and high dates in the range)
 - equal
 - Select a date To specify a date, click the Calendar and select a date. You can also enter a date directly using one of the following formats:
 - MM/DD/YY
 - MM/DD/YYYY
 - MONTH DD, YYYY
- · Filter criteria
 - Match any one filter criteria If any one of the filter criteria is met, the file will be collected from Dropbox.

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• Match all filter criteria - If all of the filter criteria are met, the file will be collected from Dropbox. If any one of the filter criteria is not met, the file will not be collected from Dropbox.

Options

Use the **Options** button in the upper-right corner of the Dropbox Explorer area to configure the folder view or add a new folder. The drop-down menu includes a shortcut key for each option:

- **Show tree view** To view the complete folder structure in a tree view, select this option.
- Show files To show files within the folder browsing view, select this option.
- New folder To create a new folder in the currently selected folder path on Dropbox, select this option. The Create New Folder window appears.
- Refresh To refresh the folder browser view (Show tree view or Show files) in Dropbox Explorer, select this option.

Folder Path

The **Folder path** field below the folder tree auto-populates when you make your folder selection in the Dropbox Explorer. If you do not want to navigate the file explorer, you can manually enter the folder path in this field.

Metadata

The following metadata is created in the Dropbox In node:

Metadata Value	Description
{dropboxin:count}	The number of collected files per folder.
{dropboxin:date}	The last modified date of the file collected from Dropbox.
{dropboxin:file}	The name of the file collected.
{dropboxin:filesize}	The size of the file collected.
{dropboxin:folder}	The name of the folder the file was collected from.
{dropboxin:fullpath}	The full file path including file name.

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Process Nodes

Processes

A palette of Process nodes are available for use in the **Workflow Builder**. **Base nodes** are standard in **Dispatcher Phoenix**. **Optional nodes** are available via the **Add In Manager**.

Supported Files for Imaging Processes

Imaging processes such as annotate, deskew, despeckle, merge, split, and watermark work on a select number of file types. Dispatcher Phoenix supports any image format supported by Windows Imaging Components (WIC). These file formats include the following:

- BMP
- GIF
- JPG
- PNG
- TIFF

Since WIC can support additional formats through the use of codecs, Dispatcher Phoenix has the *potential* to support many more image formats. However, no other formats have undergone thorough testing for use in Dispatcher Phoenix. Thus, if using any other image format than the five listed above, your results may be unpredictable.

Note: Unsupported file types coming into image processing nodes will go out on error.

Node Order in Workflow

Make sure that the nodes are placed in the correct order within your workflow to ensure that it runs correctly. For example, if you want your documents to be Bates stamped with OCR metadata, you must make sure that either Forms Processing or Advanced OCR, which have been set up for zonal extraction, is placed before the Bates Stamp node in the workflow. At the time a node is being processed, metadata needs to be available for that node to use.

Advanced Routing

Color Route



Color Route

The Color Route process routes incoming PDFs and images based on the number of color pages in the document or the percentage of pages in the document with color.

This node works with PDF, TIFF, JPG, GIF, PNG, and BMP files.

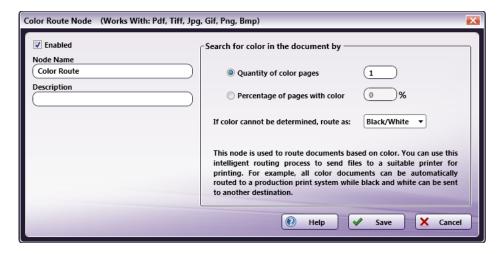
Note: This node does not support AES (Advanced Encryption Standard) PDFs.

This node can have the following outbound connectors:

- Yes If the color page count or percentage matches the specified value.
- $\mbox{\bf No}$ If the color page count or percentage does not match the specified value.
- Error If the document type is not supported, or the document contains an unknown color space.

To open the Color Route Node window, add a process node for Color Route and double-click on it.

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- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Color Route node.
- In the **Description** field, enter a description for the Color Route node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- To route files based on the number of color pages that they contain, select the **Quantity of color pages** radio button and then enter a value in the adjacent field.
- To route files based on the percentage of pages that have color, select the **Percentage of pages with color** radio button and then enter a value in the adjacent field.
- To define how your file will be routed if the quantity or percentage of color pages cannot be determined, use the drop-down list at the **If color** cannot be determined, route as: field. Routing options are:
 - Color ("Yes" Transition)
 - o Black/White ("No" Transition)
 - Error ("Error" Transition)
- Select the **Save** button to keep your Color Route definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Email Parser



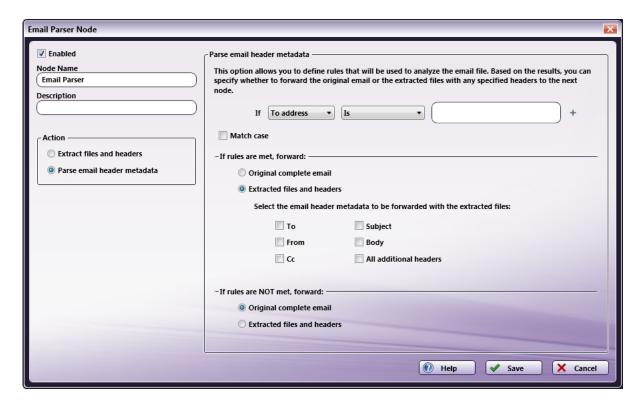
Email Parser is an optional node that is used to perform file extraction and/or routing of emails based on specified conditions. It can work in conjunction with the Email Out node. Email header metadata can be attached to extracted attachments before they are passed along to (and subsequently used by) the Email Out node.

Note: Only MIME-encoded emails are supported by Email Parser.

Using the Email Parser Node

To open the Email Parser Node window, add a process node for Email Parser Node and double-click on it.

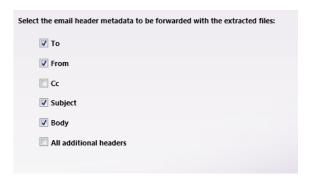
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- Enabled Check this box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Emails will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions
- Node Name Enter a meaningful name for the Email Parser node.
- **Description** Enter a description for the Email Parser node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Action In this area, you can specify how to process the emails coming through the node. Your choices are:
 - Extract files and headers Select this option to extract the email's attachments and header metadata. Then specify the appropriate options on the right-hand side of the window.
 - Parse email header metadata Select this option to separate out the email's metadata. Then specify the appropriate options on the right-hand side of the window.
- Save Saves your Email Parser definition.
- Help Accesses the Dispatcher Phoenix Online Help file.
- Cancel Exits the window without saving any changes.

Extracting Attachment Files and Headers

If you want to extract files that are attached to the email(s) being processed in this node, select the **Extract files and headers** radio button from the **Action** area on the left-hand side of the window. At this point, you will have the option of specifying which, if any, header metadata should be added to the extracted attachments by clicking on the appropriate check boxes. This information will be used later by the Email Out node. If you do not want any metadata included with the extracted files, the boxes should be left unchecked. To use additional email header metadata, check the **All** additional headers box.



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For example: If you want the Email Out node to use the original email's subject line, click the Subject check box to make sure that information is passed on along with the extracted attachments.

Note: When you select this option, the original MIME email will be discarded and only its attachments are processed/forwarded to the Email Out node

Parsing Email Header Metadata

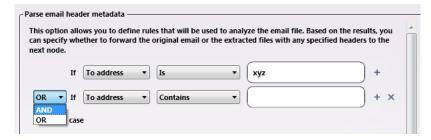
If you want to route along either the original email or the original email's attachments including specific header metadata, based on specified rules met or not met, select the **Parse email header metadata** radio button from the **Action** area on the left-hand side of the window.

Setting Up Rules

You will need to set up conditional rules to be met or not met for the documents to be passed forward. Do the following:

- 1. Select the appropriate header metadata (To address, From address, Cc address, Subject, or Body).
- 2. Select the appropriate option (Is, Contains, Regular expression).
- 3. Input the appropriate filter text in the blank field provided.
- 4. Check the Match case box to include only emails that have header metadata that matches the specific case entered.
- 5. To add another rule (using the AND or OR operation), click on the + sign next to the input field. To remove a rule, click on the X next to the input field.

If you specify more than one rule, you can choose a logical operation (AND or OR) to use, as in the following illustration:



Note: You can specify as many rules as you want.

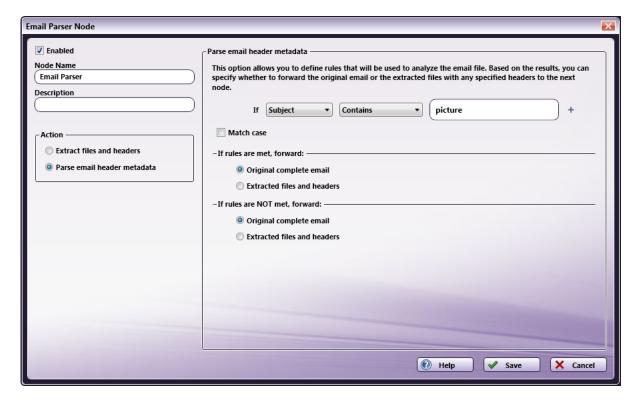
If Rules Are Met/Not Met

Once you have defined rules, you must specify what should happen next.

- To forward only the original email which follows the rule(s) that you've specified, click the **Original complete email** radio button in the **If rules** are met, forward: area. The following will occur:
 - If the next node is an Email Out node, the original email will be attached to the new email.
 - If the next node is an Output folder, the email file will be deposited in the folder.
 - If the next node is a Printer node, the email file will be sent to the printer.
 - If the next node is an FTP node, the email file will be sent to the FTP server.

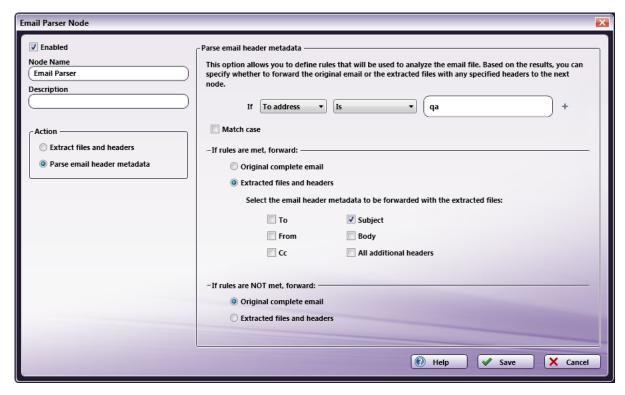
In the following illustration, only emails that have subject lines containing the word "picture" will be passed along:

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• To forward the extracted attachments and header metadata of emails which follow the rule(s) that you've specified, click the **Extracted files** and headers radio button in the **If rules are met, forward:** area. At this point, you can specify which, if any, email header metadata that you would like passed on along with the extracted files. This information will be used later by the Email Out node.

In the following illustration, the user has chosen to forward the Subject line information from email(s) which contain the letters "qa" in their To address:



You can also define what to do if your rules are not met. You can choose to pass along the original complete email by clicking the Original
complete email radio button in the If rules are NOT met, forward: area, OR pass along extracted files and metadata information by clicking
the Extracted files and headers radio button in the If rules are NOT met, forward: area and marking the appropriate metadata via the
supplied check boxes.

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Page Count Route



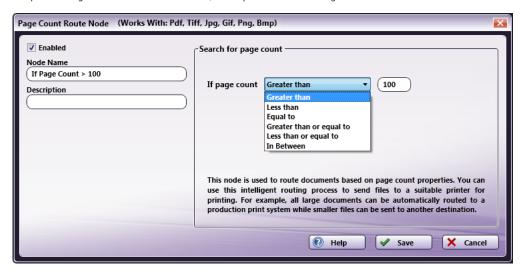
The Page Count Route process routes incoming images and PDFs based on a specific page count set by the user. This node can have the following outbound connectors:

- Yes If the number of pages is within the specified range.
- No If the number of pages is not within the specified range.
- Error If the document type is not supported.

This node works with PDF, TIFF, JPG, GIF, PNG, and BMP files.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the Page Count Route Node window, add a process node for Page Count Route and double-click on it.



- **Enabled** Check this box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- Node Name Enter a meaningful name for the Page Count Route node.
- **Description** Enter a description for the Page Count Route node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- If page count Use the drop-down list to specify the rule for this node. Options include:
 - Greater than
 - Less than
 - Equal to
 - o Greater than or equal to
 - · Less than or equal to
 - In Between If you select this option, two fields appear. Enter the range. See the example in the following illustration.



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For all other options besides **In Between**, once you have selected the appropriate operator, enter a corresponding value in the field provided. For example, to route files that have more than 100 pages to a certain printer, choose **Greater than** and then enter 100 in the field.

Barcode

2D Barcode Processing



2D Barcod Processing

2D Barcode Processing is an optional node that recognizes and extracts information from 2D barcodes on scanned documents. Use this node to automate the process of splitting, indexing, or routing documents based on the barcodes contained in the documents. With this process node, zones are created to capture 2D barcode metadata information. The zones are represented by light-blue re-sizable boxes. This node works with the following file types:

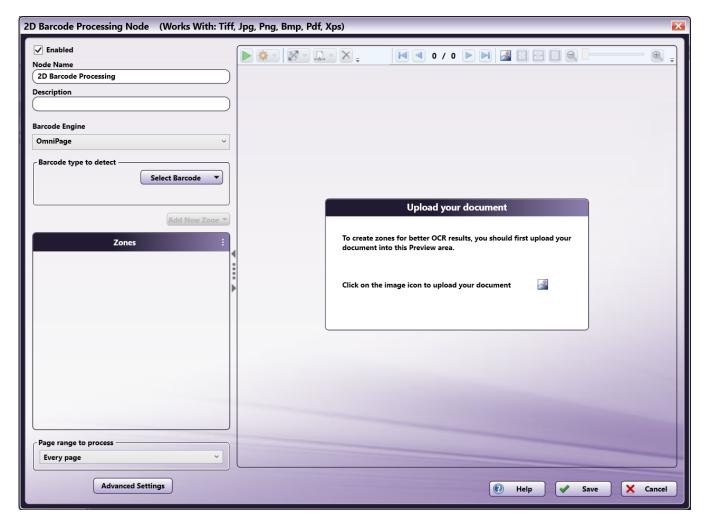
- TIFF
- JPG
- PNG
- BMP
- PDF
- · XPS OmniPage only

Note: This node includes the ZXing barcode engine. The OmniPage OCR Engine is available as a separate add-on.

Using the 2D Barcode Processing Window

To open the 2D Barcode Processing Node window, add a process node for 2D Barcode Processing and double-click on it. Then, upload a document for which to create zones. Follow the instructions on the screen, as in the following illustration:

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On the 2D Barcode Processing window, you can fully define and customize zones for your 2D barcode processing. When setting up this window, you have the following options:

- **Enabled** To enable this node in the current workflow, check this box. If you leave the box blank, the workflow ignores the node and documents will pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. If the workflow contains multiple processes, a description can help to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Advanced Settings To access the Advanced Settings for the barcode engine you have selected, click this button. Advanced Settings for OmniPage are detailed here. Advanced Settings for ZXing are detailed here.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Barcode Engine

The 2D Barcode Processing node supports two barcode engines: OmniPage and ZXing. If **multiple barcode engines** are licensed and installed in Dispatcher Phoenix, a dropdown menu appears from which you can select the engine you want to use. If only one engine is available on your system, the name of the engine displays at this field.

Note: If you change to a different barcode engine, all configuration settings except the **Enabled** checkbox and **Node Name** are discarded and set back to the default settings.

Barcode Type to Detect

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To specify the types of barcodes to detect in incoming documents, click on the **Select Barcode** button. A drop-down palette will appear that lists all the recognized barcodes. Select the barcodes that you want the application to detect. Options include:

Barcode Type	ZXing	OmniPage
All Barcodes	Yes	No
PDF 417 Code	Yes	Yes
QR Code	Yes	Yes
Data Matrix	Yes	Yes
Micro QR Code	Yes	No
rMQR Code	Yes	No
Aztec	Yes	No

Notes:

- Both barcode engines can detect multiple barcodes in a single zone.
- The ZXing barcode engine can detect multiple types of barcodes within each defined zone.
- The OmniPage barcode engine can only detect one type of barcode per node. If your document has multiple barcode types and you are using OmniPage, you will need to configure a separate 2D Barcode Processing node for each barcode type.

Tool Bar

Use the toolbar at the top of the Preview area to further define the zone as well as customize the view of the node properties window.

When using the drop-down palettes on the tool bar, pressing the **Enter** key or clicking anywhere outside of the palette applies those changes to the zone.

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Tool Bar Icons	Description
•	Run Zone Test - Click to test the zones that you have defined.
* -	Zone Test Configuration icon - Click to change the seconds allotted for the time without communication before a timeout occurs. Note that this is disabled for the ZXing engine.
Coordinates (in plank) : Lan Worth Top Height	Zone Coordinates icon - Click to define specific coordinates for the zone. You can change the size of the zone by entering values (in pixels) in the Width and Height fields. You can also move the position of the zone by entering values (in pixels) in the Left and Top fields.
Zone Page Range : On All poops within allowable range Only three pages from allowable range To the pages from allowable range To the pages from allowable range The pages from allowable	 Zone Page Range icon - Use this drop-down palette to specify the pages to which to apply the zone. Options are: All pages within allowable range - Select this radio button to apply the zone to all pages within the specified range. This means that zones configured on the first page of a document are automatically applied to the rest of the pages in the document (if the specified Page range to process is "Every page").
	• Only these pages from allowable range - Select this radio button to apply the zone to only a specific range of pages within the allowable range. Enter the page range in the field provided. For example, for a five-page document, any of the following are acceptable entries: "1-3", "1,2,5", "1&4", "1-3, 5".
	These settings can also be set when first creating a zone in the Add New Zone palette.
×	Delete icon - Click to delete a selected zone.
1/2	Pages icon - Click on the arrows to navigate through multiple pages of the sample document (if available).
<u></u>	Sample Image icon - Click find and upload another sample image to use in the Preview area.
静	Actual Size icon - Click to revert the preview sample document to its original size.
=	Fit to Width icon - Click to stretch the sample document to fit the width of the Preview area.
	Whole Page icon - Click to fit the sample document completely in the Preview area.
e — e	Zoom controls - Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Uploading a Sample Document

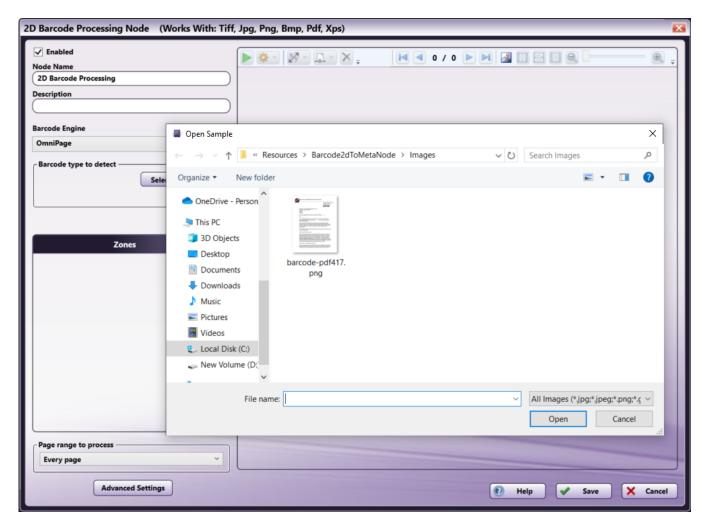
To proceed with the node configuration, you must first upload a sample document to display in the Preview Area. The document should resemble the document(s) you intend to search with the node. Do the following:

Upload - Click this icon to access the Open Sample browse folder. The icon appears in the following places on the page. Click on one.

- On the toolbar.
- In the Upload your document box in the Preview area.

In the Open Sample browse folder, you can choose from the sample documents provided by the application or navigate to another folder to select your own sample document.

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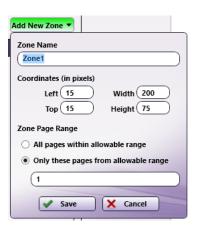
Notes:

- You can replace the sample file at any time by clicking the Sample Document icon [3] in the Preview area's toolbar. If you previously uploaded a sample document using the node properties window, Dispatcher Phoenix automatically opens the most recent folder you used when selecting a sample file. For more information about the Preview area's toolbar, see the **Toolbar** section below.
- The Preview function does not support XPS files; XPS files process as expected when the workflow is running.

Creating Zones

Zones are borders that define certain areas of the page for the OCR engine and can be created either manually or automatically. For precise control over how documents are handled, you can manually create zones by doing the following:

1. **Add New Zone** - Select this button to display a drop-down palette, as in the following illustration:



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- 2. On the Add New Zone drop-down palette, do the following:
 - Zone Name Enter an identifying name for the zone.
 - Left and Top Enter a value (in pixels) to position the zone from the left and top of the document.
 - Width Enter a value (in pixels) to define an appropriate width for the zone.
 - **Height** Enter a value (in pixels) to define an appropriate height for the zone.
 - **Zone Page Range** Specify the pages to which to apply the zone. Options include:
 - All pages within allowable range Select this radio button to apply zones to all pages within the specified range. This means that
 zones configured on the first page of a document are automatically applied to the rest of the pages in the document (if the specified
 Page range to process is "Every page").
 - Only these pages from allowable range Select this radio button to apply the zones to only a specific range of pages within the allowable range. Enter the page range in the field provided. For example, for a five-page document, any of the following are acceptable entries:
 - **1**-3
 - **1,2,5**
 - **1**&4
 - **1**-3,5
 - **1**-3, 5
- 3. Save Click this button to preserve your settings and exit the window. The zone will appear in the specified location on the Preview area.

Note: The content of this barcode can now be used by other nodes in the workflow. For more information, see the "2D Barcode Metadata" section.

4. Cancel - Select this button to exit the drop-down palette without saving any changes.

Note: At minimum, you must define at least one zone and specify its page range.

Zone List

This area displays all the defined zones for the node. In this area, you can do the following:

To access additional options for Zones, open the "More Actions" menu by clicking the : icon at the upper right of the Zones area.

Clicking the three dots in the **Zones** area will open up context menu that allows you to:

Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a "hidden" icon on next to each zone in the list when it is hidden. If the current selection includes a mix of zones that are shown and hidden, clicking this option will hide all zones.	F6 Delete all zones

Clicking the three dots next to a zone allows you to:

Menu Option	Menu Action	Keyboard Shortcut
Show / Hide zone	See next table	See next table
Delete	Delete a single zone from the Zone Editor / Canvas.	Del
Rename	Rename a zone from a right click context menu.	F2
Test this zone	Run and test a single zone, to help users test and debug individual zones.	F5

There is a second menu for **Show / Hide Zone** with more options:

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Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a "hidden" icon onext to each zone in the list when it is hidden. If the current selection includes a mix of zones that are shown and hidden, clicking this option will hide all zones.	F6
Show / Hide this zone	Toggle the visibility of a zone on the Canvas.	F7
Hide all zones but this	Hide all zones on the Canvas except the selected zone.	F9

The node also supports additional actions:

Menu Option	Menu Action	Keyboard Shortcut
Test selected zones	Run and test more than one selected zones, to help users test and debug multiple selected zones at a time.	F5
Copy zone value to the Windows Clipboard	Copy the detected zone value to the Windows clipboard. You can access this command from the right click context menu on the zone result.	Ctrl+C
Delete selected zones	Delete selected zones from the Zone Editor / Canvas.	Del

Note: You can also **Rename**, **Delete**, and/or **Show / Hide** the properties of individual zones by right-clicking them in either the Zones List area or the Preview area and selecting an option from the context menu that appears.

Preview Area

The Preview area displays a sample document as well as any defined zones. Using the Preview area, you can do the following:

- Resize a zone's bounding box by selecting the bounding box and dragging the appropriate handles until the box is the desired size.
- Reposition a zone by clicking on the bounding box and then dragging the box to its desired position.
- Select multiple zones by clicking and dragging the mouse over the zones that you want to select. Start from any white space. You can also select multiple zones by selecting one zone, holding down the Shift key, and selecting another.
- Delete a zone by selecting it and pressing the Delete key on the keyboard. A confirmation message will appear.
- **Upload a different sample document** by clicking on the **Upload** icon on the tool bar and selecting another document. If you have defined any zones for the original document, a pop-up window appears after you select the new document and you must choose whether to preserve or abandon the zones.

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	SAMPLE GOVERNMENT HEALTH AGENCY	^
	HEALTH ADMINISTRATION 370 Georgia Avenue Washington, D.C. 20447	
GI Ad Ad Ci	RANTEE AUTHORIZED REPRESENTATIVE RANTEE AGENCY NAME ddress 1 ddress 2 ity, State ssets for Independence Program Grant Number: 90EI0	
De	ear: is my pleasure to inform you that the Office of Community Services (OCS) has	
(Å Er As Co	AFI) Program funding. Inclosed please find official grant award documentation, including the Financial ssistance Award notice, the Standard Terms and Conditions and Special Terms and onditions. Please review and become familiar with these documents, as they, together	
in Ti	ith your organization's proposal, are the framework for the project and grant inplementation. the following paragraphs provide details about the AFI Resource Center and ACF points contact for this grant.	
O pr A	raining and Technical Assistance CS is committed to working in close partnership with all AFI Program grantees to roduce the best possible outcomes for grantees and their participants. We manage the FI Resource Center in order to ensure that all grantees have access to an array of aining and technical assistance services and opportunities. The program webpage at	~

Testing Zones

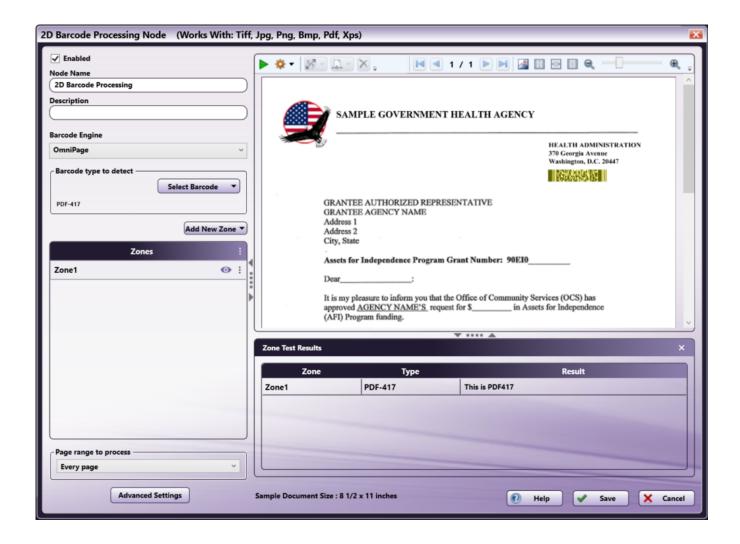
Once you create a zone and select a barcode type, you can test the zone using the **Run Zone Test** icon on the toolbar. The test returns information about the zone including the following, as shown in the illustration below:

- **Zone** The zone name
- $\ensuremath{\mathbf{Type}}$ The barcode type within the zone
- Result The result of the barcode

You can copy the value of any zone with a detected barcode value by right clicking it and selecting copy. When using the Test feature, you can test individual zones or multiple zones, either by selecting them and clicking the **Test Zone** button or by selecting them, right clicking, and selecting **Test Zone**. Multiple zones can be selected two ways:

- 1. Click and drag the mouse to highlight multiple zones at once
- 2. Use CTRL+Click to select multiple zones

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Specifying Page Ranges to Process

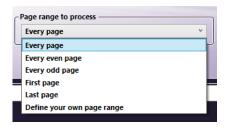
Use the Page range to process area to specify which pages to process during barcode zone processing. Options include:

- Every page Process every page.
- Every even page Process even pages.
- Every odd page Process odd pages.
- First page Process the first page only.
- Last page Process the last page only.
- **Define your own page range** Process a custom page range. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to process pages 1, 2, 5, 6, and 7.
 - Specify a specific processing sequence within a range of pages by using parentheses. For example, enter 1-10(3) to process every third
 page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to process pages 15-20 of a 20-page document.

Other examples include:

- To process pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).
- To process pages 10-15 of a 20-page document, enter: 10-end(-5).
- To process every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).
- $\circ~$ To process pages 15-20 of a 25-page document, enter: end(-10)-end(-5).
- $\circ~$ To process pages 10-20 of a 20-page document, enter: end(-10)-end.

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Note: If the page range you specify does not correspond to the number of pages in the incoming document (e.g., processing pages 10-20 for a three-page document), the file will go out on error.

2D Barcode Metadata

Once you define a 2D barcode zone, other nodes in the workflow can reference it.

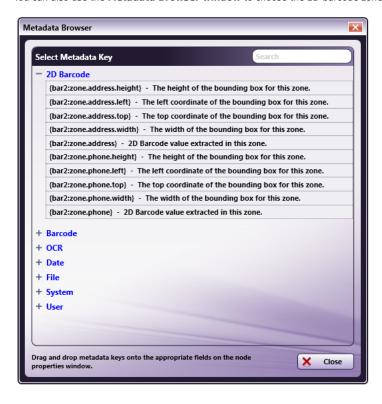
The syntax for OCR zone referencing is the following. It provides the value extracted in this zone.

{bar2:zone.nameofzone.[<page>]}

The syntax for where the OCR application found any values in the zone is the following, where [zonecoordinate] is either top, left, width, or height, as defined in pixels.

{bar2:zone.nameofzone.[zonecoordinate]}

You can also use the Metadata Browser window to choose the 2D barcode zone variable, as in the following illustration:



Barcode Generator

The Barcode Generator is a stand-alone tool that generates barcode cover pages (with or without descriptive information) or a multi-column page of barcodes for label printing. You can use the generated barcode(s) in your workflow to split and route documents or extract important metadata information associated with documents. The Barcode Generator can produce barcodes of varying size, type, and value, and output those barcodes in a variety of image file formats.

The Barcode Generator can be accessed from the following locations:

- Windows Start menu (it will be listed underneath the Konica Minolta folder).
- Tools menu from Dispatcher Phoenix main application screen.
- Barcode Processing node properties window.

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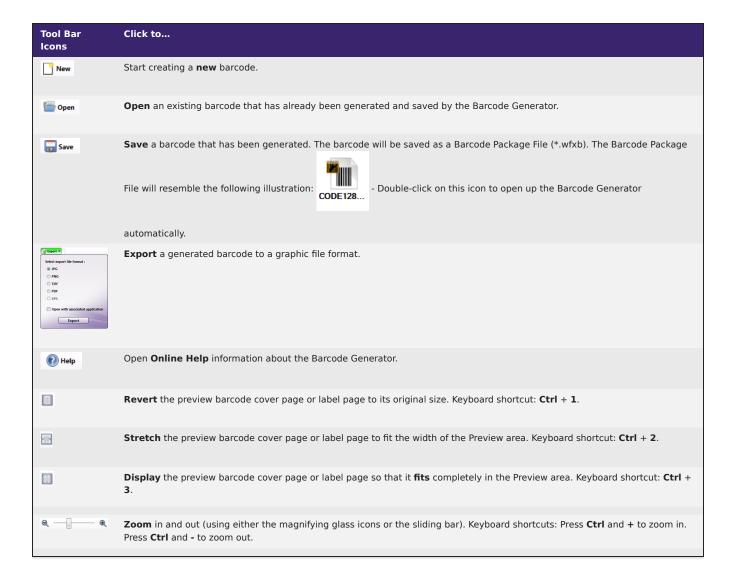
• By double-clicking on a saved Barcode Generator file.



Using the Tool Bar

The menu items and icons on the tool bar can assist you when generating barcodes.

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Creating a Barcode

To create a barcode, you need to choose the barcode type, enter the barcode value, and choose the barcode output using the **Barcode Details** section of the window. When you are done, select the **Generate** button and the generated barcode will appear on the Preview area.

Do the following:

- Choose a type of barcode from the **Barcode Encoding Type** drop-down list. The Barcode Generator supports the most popular barcode types, including Code 39, Code 128, Interleaved 2 of 5, EAN8, EAN13, UPC-A, UPC-E, Codabar, PostNet.
- Enter a corresponding value for the barcode in the **Barcode Value** field. Correct values depend on the barcode type specified. For example, an EAN-13 barcode type requires 12-13 numbers. Note the following:
 - Code 39 supports up to 58 characters. The Code 39 character set can only contain uppercase letters (A through Z), numeric digits (0 through 9) and a number of special characters (-, ., \$, /, +, %, and space).
 - Code 128 and Interleaved 2 of 5 support up to 100 characters.
- To generate a unique value for the barcode, click on the **Unique Value** button and the Barcode Value field will be automatically populated with an application-generated value. This button will only be available for those barcodes that accept unique values.
- To display the specified value below the barcode, check the Show Label box. The UPC-A, EAN 8, and EAN 13 barcodes produce check digits; you will notice their check digits appear separated by a space.
- Choose the barcode output from the Page Layout drop-down list. Options are:
 - Cover page Generates a cover page with the specified barcode. Default Konica Minolta logos will be included.
 - Cover page with info Generates a cover page with the specified barcode, as well as customized information. Default Konica Minolta logos will be included. See below for more information.

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- Labels Avery Form 5161 Generates a sheet of barcode labels that will be pre-formatted to work with Avery Form 5161 sheets. With this option, you will not be able to change the page size.
- Labels Custom Layout Generates a sheet of barcode labels with a layout that you can customize. See below for more information.

Note: To change the default logos provided when generating a cover page, select the Browse button next to the Upload logo image field and find a suitable image. Supported formats are JPG, PNG, and GIF.

• Choose the size of the cover or label page from the **Page Size** drop-down list.

Specifying Cover Page with Info

If you choose to create a cover page with descriptive information on it, additional fields will appear below the Page Layout drop-down list, as in the following illustration:



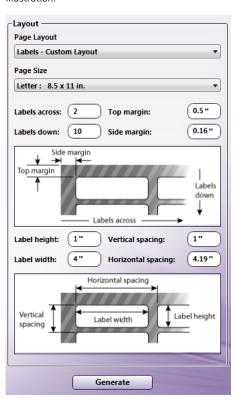
Use the **Label** and **Value** fields to enter specific information (e.g., Date and Author). To add another row of empty fields, click on the + icon. To delete a row, click on the **X** icon. This information will appear below the generated barcode, as in the following illustration:

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Specifying Labels with Custom Layout

If you want to create a sheet of barcodes that will print out as labels and you want to customize the layout, choose the **Labels - Custom Layout** option from the **Page Layout** drop-down list. Additional fields will appear (along with a visual representation) in the Layout area, as in the following illustration:



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Do the following:

- 1. Use the **Labels across** field to enter the number of labels to place across the page.
- 2. Use the **Labels down** field to enter the number of labels to place down the page.
- 3. Use the **Top margin** and **Side margin** fields to enter any margin specifications.
- 4. Use the **Label height** and **Label width** fields to enter the exact height and width measurements of a single label.
- 5. Use the **Vertical spacing** and **Horizontal spacing** fields to adjust the spacing between the labels on the page.

Note: All measurements are in inches.

Exporting a Barcode

Once the label has been generated, you can export a barcode cover page or label page. Select the **Export** button on the Tool Bar. You can export to the following file formats:

- JPG
- PNG
- TIFF
- PDF
- XPS

You can also choose to open the barcode in its associated application when the barcode is generated. Once you choose the appropriate file format, click on the **Export** button. A Windows Explorer window appears, allowing you to save the exported file in the correct location. By default, the file name will be the name of the barcode type (e.g., EAN13.png). A Konica Minolta logo will be included at the top of the exported page, as well as a "Powered by Barcode Generator" icon at the bottom of the page.

Barcode Processing



Barcode Processing

Barcode Processing is an optional node that recognizes and extracts information from barcodes on scanned documents and is used to automate the process of splitting, renaming, annotating, stamping, indexing, or routing documents based on the barcodes that are contained in the documents. With this process node, zones are created to capture barcode metadata information. The minimum length of a valid barcode is three digits. This node works with the following file types:

- TIFF
- JPG
- PNG
- BMP
- PDF
- XPS OmniPage only

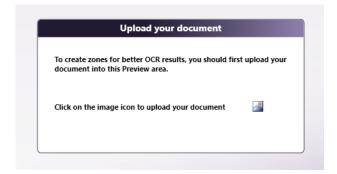
Notes:

- When extracting barcode metadata from PDF files, the PDF must be a PDF Searchable or PDF Image Only file type, and optimized for quality.
- This node includes the ZXing barcode engine. The OmniPage OCR Engine is available as a separate add-on.

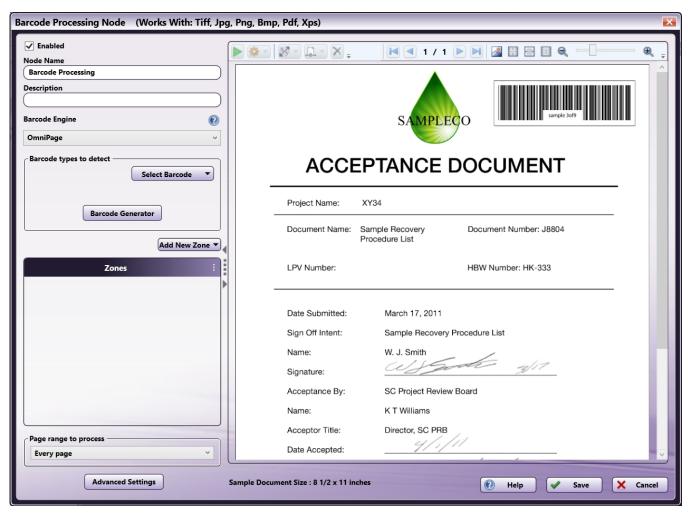
Using the Barcode Processing Node

To open the Barcode Processing Node window, add a process node for Barcode Processing and double-click on it. First, upload a document for which to create zones. Follow the instructions on the screen, as in the following illustration:

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On the Barcode Processing window, you can fully define and customize zones for your barcode processing.



Click for more information on any of the following:

- Using the Barcode Processing Node
- Using the Barcode Processing Window
- Barcode Engine
- Barcode Types to Detect
- Tool Bar
- Uploading a Sample Document
- Creating a Zone
- Zone List
- Preview Area

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- · Testing Zones
- Specifying Page Ranges to Process
- Barcode Metadata

Using the Barcode Processing Window

On the Barcode Processing window, you can fully define and customize zones for your barcode processing. When setting up this window, you have the following options:

- Enabled To enable this node in the current workflow, check this box. If you leave the box blank, the workflow ignores the node and documents will pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. If the workflow contains multiple processes, a description can help to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Advanced Settings To access the Advanced Settings for the barcode engine you have selected, click this button. Advanced Settings for OmniPage are detailed here. Advanced Settings for ZXing are detailed here.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Note: To save this node, you must create at least one zone.

To configure the Barcode Processing node properties window, you must do the following:

- 1. Choose the types of barcodes to detect.
- 2. Define zones manually.
- 3. Specify a page range.

Barcode Engine

The Barcode Processing node supports two barcode engines: OmniPage and ZXing. If **multiple barcode engines** are licensed and installed in Dispatcher Phoenix, a dropdown menu appears from which you can select the engine you want to use. If only one engine is available on your system, the name of the engine displays at this field.

Note: If you change to a different barcode engine, all configuration settings except the **Enabled** checkbox and **Node Name** are discarded and set back to the default settings.

Barcode Types to Detect

To specify the types of barcodes to detect in incoming documents, click on the **Select Barcode** button. A drop-down palette will appear that lists all the recognized barcodes. Mark the checkboxes next to the barcodes that you want the application to detect.

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Barcode Type	ZXing	OmniPage
All Barcodes	Yes	No
Code 39	Yes	Yes
Code 39 with check digit control and transmission	No	Yes
Code 39 with start-stop characters transmission	No	Yes
Code 39 full ASCII mode	No	Yes
Code 93	Yes	Yes
Code 128	Yes	Yes*
Code 128 with check digit transmission	No	Yes*
GS1-128 (also known as UCC Code 128)	No	Yes*
UPC-A	Yes	Yes
UPC-E (6-digit)	Yes	Yes
Codabar	Yes	Yes
Codabar without start-stop characters transmission	No	Yes
EAN 8/13	Yes	Yes
EAN/UPC with 2 and 5-digit supplement	No	Yes
ITF/ITF (Interleaved 2 of 5)	Yes	Yes
ITF with check digit control and transmission	No	Yes
Postnet Code	No	Yes
DataBar	Yes	No
DataBar Extended	Yes	No

*You can select only one of these options at a time when using the OmniPage engine (UCC Code 128, Code 128, and Code 128 with check digit transmission).

Note: If Code 128 with check digit transmission is selected, any detected Code 128 barcode will be reported with the check digit. The check digit, used to check for an error in scanning, becomes the last digit of the barcode. Dispatcher Phoenix's Barcode Generator only produces Code 128 barcodes without the check digit so you will have to select the Code 128 option for any Code 128 barcodes generated by the Barcode Generator.

Once you have selected a barcode type, it will be listed in the **Barcode Types to Detect** area on the node properties window.

Tool Bar

The toolbar at the top of the window allows you to further define the zone as well as customize the view of the node properties window.

When using the drop-down palettes on the tool bar, pressing the **Enter** key or clicking anywhere outside of the palette will apply those changes to the zone.

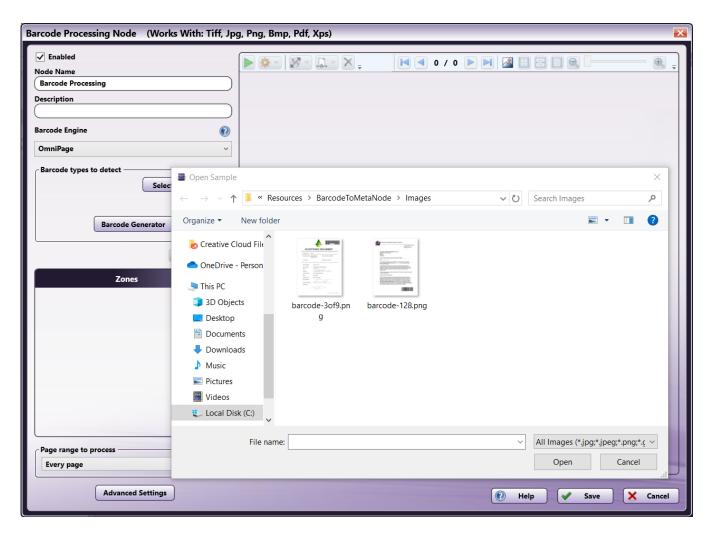
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Tool Bar Icons	Description
•	Run Zone Test Icon - Click to test the zones that you have defined.
* -	Zone Test Configuration Icon - Click to change the seconds allotted for the time without communication before a timeout occurs. Note that this is disabled for the ZXing engine.
Coordinates (in plants) : Lant Width Top Meight	Zone Coordinates Icon - Click to define specific coordinates for the zone. You can change the size of the zone by entering values (in pixels) in the Width and Height fields. You can also move the position of the zone by entering values (in pixels) in the Left and Top fields.
Zene Page Zenge: On All pages wither althought range Only three segues trees althought range () Only three segues trees althought range	 Zone Page Range Icon. Use this drop-down palette to specify the pages to which to apply the zone. Options are: All pages within allowable range - Select this radio button to ensure that the zone will be applied to all pages within the specified range. This means that a zone configured on page 1 will automatically be applied to the rest of the pages in the document (if the specified page range to process is Every Page).
	 Only these pages from allowable range - Select this radio button to ensure that the zone will be applied to only a specific range of pages within the specified range. Next, enter the page range in the empty field provided.
	These settings can also be set when first creating a zone in the Add New Zone palette.
×	Delete icon - Click to delete a selected zone.
1/2	Pages icons - Click on the arrows to navigate through multiple pages of the sample document (if available).
<u></u>	Sample Document icon - Click to find and upload another sample document to use in the Preview area.
*	Actual Size icon - Click to revert the preview sample document to its original size.
=	Fit to Width icon - Click to stretch the sample document to fit the width of the Preview area.
	Whole Page icon - Click to fit the sample document completely in the Preview area.
Q — Q	Zoom controls - Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Uploading a Sample Document

Clicking on the **Upload** icon on the tool bar allows you to upload your own sample document on which you can create your zones. When you click on the **Upload** icon, an "Open Sample" browse folder appears from which you can choose the appropriate document, as in the following illustration:

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Creating a Zone

Zones are borders that define certain areas of the page for the OCR engine and can be created either manually or automatically. For precise control over how documents are handled, you can manually create zones by doing the following:

1. **Add New Zone** - Click this button to display a drop-down palette, as in the following illustration:



- 2. On the Add New Zone drop-down palette, do the following:
 - $\circ~$ Zone Name Enter an identifying name for the zone.
 - Left and Top Enter a value (in pixels) to position the zone from the left and top of the document.
 - Width Enter a value (in pixels) to define an appropriate width for the zone.

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- **Height** Enter a value (in pixels) to define an appropriate height for the zone.
- Zone Page Range Specify the pages to which the zone will be applied. Options include:
 - All pages within allowable range Select this radio button to apply zones to all pages within the specified range. This means that a zone configured on the first page of a document will automatically be applied to the rest of the pages in the document (if the specified page range to process is Every Page).
 - Only these pages from allowable range Select this radio button to apply the zones to only a specific range of pages within the allowable range. Enter the page range in the field provided. For example, for a five-page document, any of the following are acceptable entries:
 - **1**-3
 - **1,2,5**
 - **1**&4
 - **1**-3,5
 - **1**-3, 5
- 3. Save Click this button to preserve your settings and exit the window. The zone will appear in the specified location on the Preview area.
- 4. Cancel Select this button to exit the drop-down palette without saving any changes.

Zone List

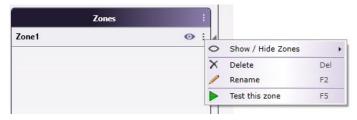
This area displays all the defined zones for the node. In this area, you can do the following:

To access additional options for zones, open the "Context Menu" menu by clicking the : icon at the upper right of the Zones List area, as shown below:



Clicking the three dots in the **Zones** area will open up context menu that allows you to:

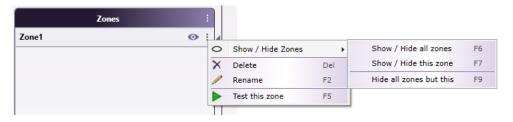
Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a "hidden" icon onext to each zone in the list when it is hidden. If the current selection includes a mix of zones that are shown and hidden, clicking this option will hide all zones.	F6
Delete all zones	Delete all zones from the Zone Editor / Canvas.	Ctrl+Shift+Del



Menu Option	Menu Action	Keyboard Shortcut
Show / Hide zone	See next table	See next table
Delete	Delete a single zone from the Zone Editor / Canvas.	Del
Rename	Rename a zone from a right click context menu.	F2
Test this zone	Run and test a single zone, to help users test and debug individual zones.	F5

There is a second menu for **Show / Hide Zone** with more options:

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Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a "hidden" icon onext to each zone in the list when it is hidden. If the current selection includes a mix of zones that are shown and hidden, clicking this option will hide all zones.	F6
Show / Hide this zone	Toggle the visibility of a zone on the Canvas.	F7
Hide all zones but this	Hide all zones on the Canvas except the selected zone.	F9

The node also supports additional actions:

Menu Option	Menu Action	Keyboard Shortcut
Test selected zones	Run and test more than one selected zones, to help users test and debug multiple selected zones at a time.	F5
Delete selected zones	Delete selected zones from the Zone Editor / Canvas.	Del

Note: You can also access the **Show / Hide, Delete, Rename, Test this zone** options by right-clicking a zone in the Preview area and selecting an option from the menu that appears.

Preview Area

The Preview area displays a sample document on which the defined zones appear. Using the Preview area, you can do the following:

- 1. Resize a zone's bounding box by selecting the bounding box and dragging the appropriate handles until the box is the desired size.
- 2. **Reposition** a zone by clicking on the bounding box and then dragging the box to its desired position.
- 3. **Select multiple zones** in a rectangular area by dragging a marquee over the zones that you want to select using your mouse. To do this, you must start from any white space. Alternatively, you can select multiple stamps by selecting one stamp, holding down the Shift key, and selecting another.
- 4. **Delete** a zone by selecting it and pressing the Delete key on the keyboard. A confirmation message will appear.
- 5. **Upload a different sample document** by clicking on the **Upload** icon on the tool bar and selecting another document. If you have defined any zones for the original document, a pop-up window appears after you select the new document and you must choose whether to preserve or abandon the zones.

Note: The Preview function does not support XPS files; XPS files process as expected when the workflow is running.

Testing Zones

Once a zone has been created and a barcode type has been selected, you can test the zone using the **Test All Zones** icon on the toolbar. This returns information about the zone including the following:

- Zone name
- Barcode type within the zone
- · Result of the barcode

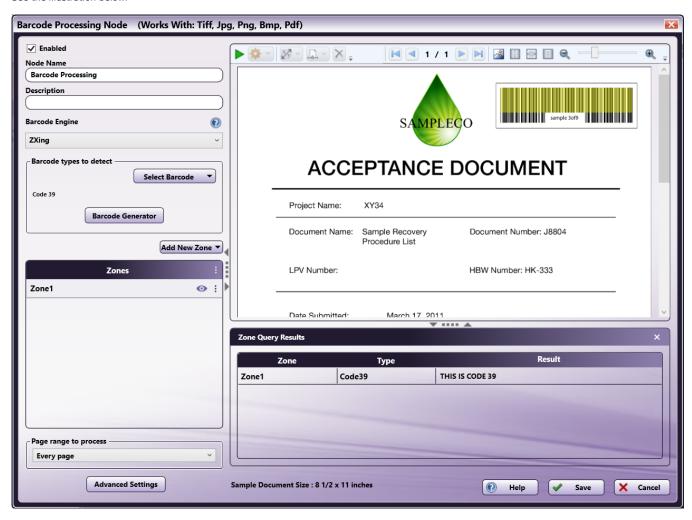
You can copy the value of any zone with a detected barcode value by right clicking it and selecting copy.

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When using the Test feature, you can test individual zones or multiple zones, either by selecting a zone, right clicking a zone and selecting **Test this Zone** or by selecting multiple zones, right clicking, and selecting **Test selected zones** or clicking the **Test All Zones** button on the toolbar. Multiple zones can be selected two ways:

- 1. Click and drag the mouse to highlight multiple zones at once
- 2. Use CTRL+Click to select multiple zones

See the illustration below:



There are two ways to copy the value of a tested zone:

- 1. You can right click on the zone and select Copy barcode Value.
- 2. You can right click on the zone result in the zone results query section and select **Copy**.

Menu Option	Menu Action	Keyboard Shortcut
Copy zone value to the Windows Clipboard	Copy the detected zone value to the Windows clipboard. You can access this command from the right click context menu on the zone result.	Ctrl+c

Notes:

- You can see the value of a tested zone by hovering the mouse over the zone.
- You can adjust the size of the preview section and the zone results query section by clicking and dragging the edges of the area.

Specifying Page Ranges to Process

The Page Range Process area allows you to specify which pages to process during barcode zone processing. Options include:

• Every page - Process every page.

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- Every even page Process even pages.
- Every odd page Process odd pages.
- · First page Process the first page only.
- · Last page Process the last page only.
- **Define your own page range** Process a custom page range. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to process pages 1, 2, 5, 6, and 7.
 - Specify a specific stamping sequence within a range of pages by using parentheses. For example, enter 1-10(3) to process every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to process pages 15-20 of a 20-page document.

Other examples include:

- To process pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).
- To process pages 10-15 of a 20-page document, enter: 10-end(-5).
- To process every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).
- To process pages 15-20 of a 25-page document, enter: end(-10)-end(-5).
- To process pages 10-20 of a 20-page document, enter: end(-10)-end.

Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., processing pages 10-20 for a three-page document), then the file will go out on error.

Barcode Metadata

Once a barcode zone has been defined, it can be referenced by other nodes in the workflow.

The syntax for barcode zone referencing is {bar1:zone.nameofzone.[<page>]}, which will provide the value extracted in this zone.

The syntax for where the OCR application found any values in the zone is {bar1:zone.nameofzone.[zonecoordinate]}, where [zonecoordinate] is either top, left, width, or height, as defined in pixels.

You can also use the Metadata Browser window to choose the barcode zone variable, as in the following illustration:



Barcode Writer

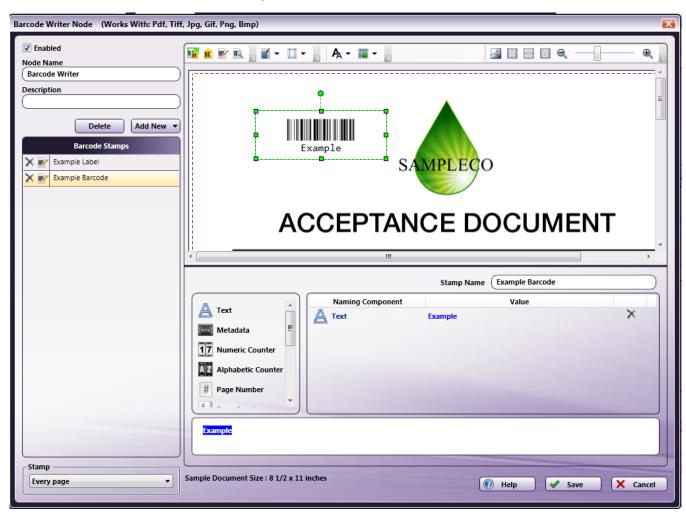
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The Barcode Writer node is used to create one or more customized barcodes and barcode labels and position them on scanned image files. You have the option of creating Code 3 of 9 and Code 128 barcodes. The barcode fonts needed for this node are installed automatically with the Barcode Writer module.

With this node, barcodes can be positioned vertically or horizontally anywhere on the page. You can also rotate barcodes at 90° angles. Other advanced positioning and formatting options are also available, including shrinking the size of the page content and shifting the content's position on the page to make room for barcodes. This node works with TIFF, JPG, GIF, PNG, BMP, and PDF files.

To open the Barcode Writer node properties window, add a process node for **Barcode Writer** onto the Workflow Builder canvas and double-click on it. The Barcode Writer node window resembles the following illustration:



Barcode Stamps List

In the Barcode Stamps list area, you can do the following:

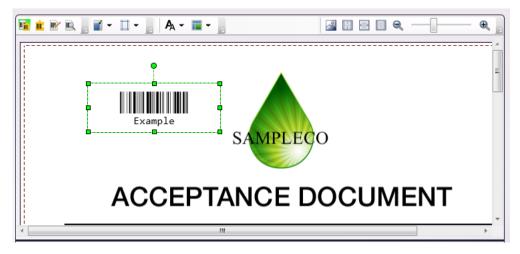
- Arrange the order of the barcodes/labels. When working with multiple barcodes and/or barcode labels that overlap each other on the page, you can change their order by dragging-and-dropping the barcode/labels listed.
- Edit the name of a Barcode or Barcode Label. To change the name used to identify a barcode or barcode label, either click on the Edit icon next to its name, or double-click on the name.
- **Delete the defined barcode or barcode label.** Either click on the **Delete** icon next to the name, or select the barcode or barcode label in the Barcode Stamps list and press the **Delete** key on your keyboard. A confirmation message will appear to ensure that you really want to delete the barcode/label.



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Edit Barcodes Area

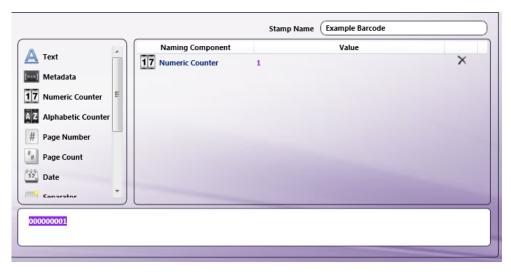
The Edit Barcodes area displays a sample document on which the defined barcodes/labels appear. On the sample document, margins are displayed in red. By default, the Barcode Writer node comes pre-populated with a defined Code 128 Barcode that has a value of "Example" and a Barcode Label that lists the sample barcode's value, as in the following illustration:



You can do the following:

- Resize the bounding box by selecting the bounding box in the Edit Barcodes area and dragging the appropriate handle(s) until the box is the desired size
- Rotate the bounding box in 90° increments by clicking on the bounding box in the Edit Barcodes area and dragging the rotation handle at the top of the box until the box is correctly angled.
- Move the bounding box to a new location by clicking on the bounding box in the Edit Barcodes area and then dragging the box to its desired position. You can also select the barcode or barcode label and then use the arrow keys on your keyboard to move it.
- Select multiple barcodes/labels in a rectangular area by dragging a marquee over the ones that you want to select using your mouse. Note that you must start this from either outside the sample document, or, if page content has been shifted, from any white space. Alternatively, you can select multiple barcodes/barcode labels by selecting one, holding down the Shift key, and selecting another.
- To select all the objects in a rectangular area, use the Selection tool to drag a marquee over the objects you want to select.
- Delete a barcode/barcode label by selecting it and pressing the Delete key on the keyboard. A confirmation message will appear.
- Shift the sample content by selecting the sample document and dragging it with your mouse (or using the arrow keys on your keyboard to move it).
- View your barcodes/labels on a different sample document by clicking on the **Upload** icon on the tool bar.

Components Area



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The Components area is the section of the Barcode Writer node window where barcodes and barcode labels can be designed. All of the naming components that can be used to create a barcode or barcode label are listed as icons on the left-hand side. In addition, this area includes a **Stamp Name** field in which you can edit the name of the barcode or barcode label, if necessary. Drag and drop icons from the list to the main part of the Components area to design your barcode or barcode label.

A results area, provided at the bottom of the window, allows you to see the components that you've already defined, as in the following illustration:



Tool Bar

The tool bar at the top of the window allows you to configure the appearance of the barcode or barcode label, the appearance of the page content, and the properties of the actual window itself. Any changes you make to the view of the window will remain in effect the next time you open this window.

When using the drop-down palettes on the tool bar, pressing the **Enter** key or clicking anywhere outside of the palette will save those changes in the Edit Barcodes area. Note that some of the options available on the tool bar are designed to be used with the Edit Barcodes area; the Components area will not be affected by them.

Tool Bar Icons	Click to
Lic.	Show both Edit Barcodes and Component areas. This is the default setting.
ú:	Show the Component area only in the window.
W	Show the Edit Barcodes area only in the window.
III)	Show Print Preview . Clicking on this icon displays what the final output of the barcode/barcode label on the sample document would look like. The content of the barcode/barcode label(s) cannot be formatted in Print Preview.
* •	Shrink and shift the content of the page.
□ -	Specify margins for the page.
Code 128 v 35 v	Customize the font by choosing from the Font drop-down palette. You can choose the size of the barcode or barcode label font, the justification of the barcode or barcode label within the bounding box (left, center, right), and the alignment of the barcode or barcode label within the bounding box (top center, center, bottom center).
Worth SE2 Lant 234.4 Height 22 trop 14 Anystal 8 June 144.4 Anystal 8 June 144.4 Anystal 9 June 144.6 And 9 June 144.	Customize the layout of the bounding box by specifying various options on the Layout drop-down palette. Note that these changes can also be made manually by resizing or moving the bounding box in the Edit Barcodes area. • To specify the width of the bounding box, enter the correct value in pixels in the Width field.
	• To specify the height of the bounding box, enter the correct value in pixels in the Height field.
	 To specify the placement of the bounding box from the left and/or top of the document, enter the correct values in pixels in the Left and/or Top fields.
	• To specify the angle for the bounding box, use the Angle sliding bar or enter the correct value in the blank field provided.
	Find and upload another sample document to use in the Edit Barcodes area.
*	Revert the preview sample document to its original size. Keyboard shortcut: Ctrl + 1 .
	Stretch the sample document to fit the width of the Edit Barcodes area. Keyboard shortcut: Ctrl + 2 .
	Display the sample document so that it fits completely in the Edit Barcodes area. Keyboard shortcut: Ctrl + 3 .
e — e	Zoom in and out (using either the magnifying glass icons or the sliding bar). Keyboard shortcuts: Press Ctrl and + to zoom in. Press Ctrl and - to zoom out.

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Using the Barcode Writer Window

On the Barcode Writer window, you can fully customize and organize barcodes and barcode labels. When setting up the node, make sure you do the following:

- Check the **Enabled** box so that the node will be processed when the workflow runs. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not be checked for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Barcode Writer node.
- In the **Description** field, enter a description for the Barcode Writer node. This field is not required; however, it can be useful for clarification. If the description is long, you can hover the mouse over the field to read its entire contents.
- When you are done customizing the node, select the **Save** button to keep your barcode(s) and label(s). You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

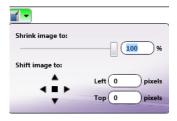
Uploading Sample Documents

Clicking on the **Upload** icon on the tool bar allows you to upload your own sample document to use as a preview when configuring your barcodes and labels. The application provides you with five sample documents of various sizes (**A4**, **Letter-Portrait**, **Letter-Landscape**, **Legal**, **and Tabloid**) that you can also use. If you are uploading your own document, note that PDF files cannot be used as sample documents.

When you click on the Upload icon, a "Select an image" browse folder will appear from which you can choose the appropriately sized document.

Note: The sample document must be at least ½ inch by ½ inch.

Shrinking and Shifting The Content Of The Page



To make sure that the barcodes or labels do not obscure important information on the page, it may be necessary to shrink and shift the contents of the page.

- To shrink the content of the page, click on the **Shrink** icon on the tool bar; then use the **Shrink image to** sliding bar to specify the percentage that the contents should shrink to. You can also enter a percentage amount in the field to the right of the sliding bar.
- To shift the position of the content, use the **Shift image to: up, down, left, right arrows**, enter an amount (in pixels) for the positions in the **Left** and **Top** fields, or select the content and drag using the mouse. To center the content on the page, click the **square in the center**. Shifting positions will clip the content when it goes outside the page boundaries.
- Clicking once on an arrow moves the content one pixel at a time. However, if you'd like to move faster, you can click on an arrow and hold the
 left mouse button down. To increase your speed again, hold the left mouse button down after clicking on an arrow and press either the Ctrl or
 Shift key. The fastest way to shift content is to click on an arrow, keep the left mouse button down, and press both the Ctrl + Shift keys.

Specifying Margins

If you want to change the margins of your documents, click on the **Margins** icon from the tool bar to enter new values in the **Top, Bottom, Left, Right** fields. Note that you can position a barcode or label beyond the limits of these page margins if desired. Margins are provided for reference, and also are useful when determining the layout of your barcodes and labels. The unit of measurement for margins is inches.

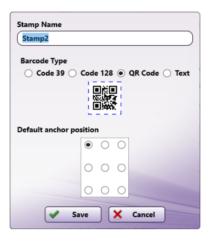
Note: If an incoming document contains pages that are smaller than the specified page margins on this node, the file will go out on error if those pages are selected to be stamped with the barcode/label.

Inserting A Barcode / Barcode Label

To customize the node to insert a barcode/barcode label into a document, do the following:

- 1. In the Barcode Stamps area, do **one** of the following:
 - Select the "Example Barcode" barcode or "Example Label" label that has been pre-defined in the node, or
 - Select the Add New button.
 - 2. If you select the Add New button, a drop-down palette will appear, as in the following illustration:

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On the Add New palette, do the following:

- In the **Stamp Name** field, enter a name for the barcode or barcode label (so that you can identify it in the node). Note that this name can also be edited in the **Components** area.
- Using the **Barcode Type** radio buttons, choose the type of barcode that you want to insert (Code 3 of 9, UTF 128 B or QR Code) or choose **Text** to insert a barcode label.
- Using the radio buttons underneath the Default anchor position box, choose a starting position for the barcode/label. Note that, once
 defined, you can modify this location by either using the Layout drop-down palette or moving the bounding box with your mouse in the Edit
 Barcodes area.
- When you are done, select the Save button.

If you choose to position a new barcode or barcode label in the same location as an existing one, the new barcode/label will be placed immediately below the existing one.

- 3. Specify the pages that should be stamped with the barcode or label using the **Stamp** pull-down menu. Options include:
 - Every page Insert the barcode/label on every page.
 - Every even page Insert the barcode/label on even pages.
 - Every odd page Insert the barcode/label on odd pages.
 - First page Insert the barcode/label on the first page only.
 - Last page Insert the barcode/label on the last page only.
 - **Define your own page range** Define a custom page range for the barcode/label. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to signify pages 1, 2, 5, 6, and 7.
 - Specify a specific stamping sequence within a range of pages by using parentheses. For example, enter 1-10(3) to insert barcodes/labels every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to insert barcodes/labels on pages 15-20 of a 20-page document.

Other examples include:

To add barcodes/labels to pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).

To add barcodes/labels to pages 10-15 of a 20-page document, enter: 10-end(-5).

To add barcodes/labels to every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).

To add barcodes/labels to pages 15-20 of a 25-page document, enter: end(-10)-end(-5).

To add barcodes/labels to pages 10-20 of a 20-page document, enter: end(-10)-end.

Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., adding barcodes/labels to pages 10-20 for a 3 page document), then the file will go out on error.

4. Customize the barcode or barcode label by dragging and dropping naming components into the Components main area. They can be reordered at any time by dragging-and-dropping them in this area.

Barcode Metadata

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Once a barcode has been created, it can be referenced by other nodes in the workflow. The syntax for Barcode Writer referencing is {bar: name of barcode [<page>]}.

Note: Barcode label metadata is not captured.

You can also use the Metadata Browser window to choose the Barcode Writer variable, as in the following illustration:



Positioning and Sizing Barcodes For Different Document Sizes

When configuring barcodes and labels, keep in mind that the *margins* and *font size* that you specified will remain the same, regardless of the dimensions of the images that the barcodes will be applied to; however, the size and position of the barcode/label's bounding box, which indicates the maximum area in which text can be placed, will be adjusted proportionally to the document size.

For example, a barcode with a font size of 12 pt. that is centered in a 180 x 50 pixel bounding box and positioned at the top left of an 8 $\frac{1}{2}$ x 14 sample document will appear much differently when applied to a 5 x 7 document. The bounding box will shrink and the barcode/label will no longer fit completely inside the box.

On the other hand, a QR Code is not re-sized by the font. Rather, the QR Code itself is responsive. The size of a QR Code cannot be changed by increasing or decreasing the font size. The minimum size for a QR Code is 29px x 29px.

To support a wide range of different-sized documents, try the following:

- Layout your barcodes/labels on a variety of documents by uploading other sample documents into the Edit Barcodes area. The sample image should be representative of the documents which are to be processed.
- Adjust the layout of the bounding box's height and width to ensure that the bounding box remains large enough to display all of the barcode/label. If you want to make sure that your text always remains visible, stretch the height of the bounding box to fit the document's height.

Specifying Absolute Measurements For The Bounding Box

To ensure that the bounding box is the same size and position regardless of the document being processed, check the **Use Absolute**Measurements box on the Layout palette. Once this option is enabled, the barcode/label will not scale but will remain the same. Note that this may mean that if a document with a different layout orientation or size is processed, the barcode/label may be positioned off the page.

Barcode Naming Components

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Naming Component

Description



Text - Adds text to your barcode value. Once you drag-and-drop the **Text** icon to the Naming Components main area, double-click on the icon to enter the appropriate text.

- 1. There are no standard character limits on the text component for a regular barcode. The maximum number of character is governed by the page size.
- 2. When assigning a text value to a Code 39 barcode the following restrictions apply:
 - Allowed: A-Z [UPPERCASE only], 0-9, space, -, ., \$, /, +, %
 - Max: None
- 3. When assigning a text value to a Code 128 barcode the following restrictions apply:
 - Allowed: a-z, A-Z, 0-9, space, !, ", #, \$, %, &, ', (,), *, +, ,, -, ., /, [, ,], ^, _, ', .
 - Max: None
- 4. When assigning a text value to a QR Code the following character restrictions apply:
 - Numeric
 - Allowed: 0-9
 - Max: 5,597
 - Alphanumeric
 - Allowed: 0-9, A-Z [UPPERCASE ONLY], space, \$, %, *, +, -, ., /, :
 - Max: 2,411
 - Binary
 - Max: 1,166
 - Kanii
 - Max: 778



Metadata - Adds metadata to your barcode value from other nodes in the workflow as well as system-defined metadata such as date, file, and system variables. Once you drag-and-drop the **Metadata** icon to the Naming Components main area, double-click on the icon and then click on the **Select Metadata Key** button to access the Metadata Browser.



Numeric Counter - Adds a numeric, sequential counter to your barcode value. Once you drag-and-drop the **Numeric Counter** icon to the Naming Components main area, double-click on the icon to customize the counter. On the fields that appear, do the following:

- 1. Enter an appropriate starting value for the counter in the **Start Value** field. The Start Value supports up to 255 characters.
- 2. Enter an appropriate ending value for the counter in the **End Value** field. The End Value supports up to 255 characters.
- 3. Choose either **Increment By** or **Decrement By** in the drop-down list to specify whether or not the counter should increase or decrease as the node is processed; in the empty field next to it, enter the appropriate value by which the counter should increment or decrement. Note that if you select the **Increment By** option, the **End Value** must be greater than the **Start Value**, and if you select the **Decrement By** option, the **Start Value** must be greater than the **End Value**.
- 4. To pad the counter with leading characters, such as spaces, zeros, or other symbols, choose from the **Leading Character** drop-down list.
- 5. To disable the counter from cycling, uncheck the **Cycles** box. This means that the counter will not cycle automatically, and the file(s) will go out on error once the specified End Value has been reached. At this point, the counter's status changes to EXPIRED.
- 6. To change how the counter will be determined, you can check the **Document Level Counter** box. With this option enabled, the counter will continue with each successive document rather than each page. The default behavior applies a sequential counter to each page of each document.
- 7. The **Counter Status** area displays the current status of the counter, with its current value. To reset a counter to its original "Start Value" after the workflow has run at least once, select the **Reset** link. To lock a counter so that it cannot be reset, select the **Lock** link.

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Naming Description Component Alphabetic Counter - Adds an alphabetic counter to your barcode value. Once you drag-and-drop the Alphabetic Counter icon ΑZ to the Naming Components main area, double-click on the icon to customize the counter. On the fields that appear, do the following: 1. Enter an appropriate starting value for the counter in the **Start Value** field. The Start Value supports up to 255 characters. 2. Enter an appropriate ending value for the counter in the End Value field. The End Value supports up to 255 characters. 3. Choose either Increment By or Decrement By in the drop-down list to specify whether or not the counter should increase or decrease as the node is processed; in the empty field next to it, enter the appropriate value by which the counter should increment or decrement. This field only accepts numeric input. For example, specifying an increment of 2 with a "Start Value" of A and an End Value of "Z" would produce "A, C, E, G, I..., etc." Note that if you select the Increment By option, the End Value must be greater than the Start Value, and if you select the Decrement By option, the Start Value must be greater than the End Value. 4. To pad the counter with leading characters, such as spaces, zeros, or other symbols, choose from the Leading Character drop-down list. 5. To disable the counter from cycling, uncheck the Cycles box. This means that the counter will not cycle automatically, and the file(s) will go out on error once the specified End Value has been reached. At this point, the counter's status changes to EXPIRED. 6. To specify that the alphabetic counter be displayed in lowercase, check the **Lowercase Output** box. 7. To change how the counter will be determined, you can check the Document Level Counter box. With this option enabled, the counter will continue with each successive document rather than each page. The default behavior applies a sequential counter to each page of each document. 8. The Counter Status area displays the current status of the counter, with its current value. To reset a counter to its original "Start Value" after the workflow has run at least once, select the Reset link. To lock a counter so that it cannot be reset, select the **Lock** link. With both the Reset and Lock actions, you will receive confirmation messages. Page Number - Adds the page number to the barcode value by dragging-and-dropping the Page Number icon to the Naming # Components main area. Page Count - Adds the total number of pages to the barcode value by dragging-and-dropping the Page Count icon to the Naming Components main area. Date - Adds the current date to the barcode value. Once you drag-and-drop the Date icon to the Naming Components main area, 12 double-click on the icon to customize the date's appearance. • To add the month, date, and year, select the MM-dd-yyyy radio button. • To add the month only, select the MM radio button. • To add the day only, select the **dd** radio button. • To add the year only, select the yyyy radio button. Time - Adds the current time to the barcode value. Please note this component is not available for Code 3 of 9 barcodes. Once (3) you drag-and-drop the Time icon to the Naming Components main area, double-click on the icon to customize the time's appearance. • To add the hour, minutes, and seconds, select the **HH:mm:ss** radio button. • To add the hour only, select the **HH** radio button. • To add the minutes only, select the **mm** radio button. • To add the seconds only, select the ss radio button.

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Naming Component	Description
	Separators - Adds a wide variety of separators to the barcode value. Once you drag-and-drop the Separator icon to the Naming Components main area, double-click on the icon to choose the appropriate separator from the drop-down list. Options include: • Space
	• Colon (:)
	Semi-colon (;)
	Comma (,)
	• Tilde (~)
	Exclamation point (!)
	At sign (@)
	Pound sign (#)
	Dollar sign (\$)
	• Percent sign (%)
	• Period (.)
	• Period (.) • Dash (-)
	Plus sign (+) Underscore ()
	• Officerscore (_)
	File Name - Adds the name of the file to the barcode value by dragging-and-dropping the File Name icon to the Naming Components main area.
Зуz	File Extension - Adds the extension of the file to the barcode value by dragging-and-dropping the File Extension icon to the Naming Components main area.
<u>5</u> _5	File Size - Adds the size of the file (in bytes) to the barcode value by dragging-and-dropping the File Size icon to the Naming Components main area.
<u>=</u>	Image Width - Adds the width of the image to the barcode value by dragging-and-dropping the Image Width icon to the Naming Components main area.
	Image Height - Adds the height of the image to the barcode value by dragging-and-dropping the Image Height icon to the Naming Components main area.

Note: QR Codes have a built in Level M error correction feature. The error correction rate for Level M is 15%.

Barcode Label Components

At Text - Adds text to your barcode label. Once you drag-and-drop the **Text** icon to the Naming Components main area, double-click on the icon to enter the appropriate text.

Barcode Value - Adds a barcode value to your barcode label. Once you drag-and-drop the **Barcode Value** icon to the Naming Components main area, double-click on the icon to select the barcode that you want to use.

Editing A Barcode/Label

Once a barcode or barcode label has been created, you can edit it by doing one of the following:

- Select it from the ${\bf Barcode\ List},\ or$
- Select the bounding box on the **Edit Barcode** area.

Database

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ODBC



ODBC

The ODBC process node allows you to do the following:

- Retrieve data from an ODBC (Open Database Connectivity) data source and associate it with the file as metadata (e.g., {odbc:column name}).
- · Use existing metadata associated with a file or workflow in order to update data in the ODBC data source.

Note: ODBC metadata variables are case-sensitive. When using ODBC metadata in your workflow, make sure that you use the appropriate case.

Drivers

In order to use this node, the appropriate ODBC driver must be installed on the same PC as Dispatcher Phoenix. There are ODBC drivers for every major database system. Go to the SEC web site for links to some of the available drivers: https://www.sec.kmbs.us/version2/products/dppe/odbc.html.

Important!

- With 32-bit Operating Systems, you must use 32-bit Drivers.
- On 64-bit platforms, the driver's architecture must match the software's architecture. If you want the ODBC node to work within a 64-bit installation of Dispatcher Phoenix, you should find a 64-bit ODBC Driver.
 - If you have installed a 32-bit version of Microsoft Office on a 64-bit Operating System, you will not be able to install the 64-bit Access
 - If you cannot access any 64-bit ODBC Drivers, you can uninstall the 64-bit version of Dispatcher Phoenix and install the 32-bit version of the
 application on your 64-bit Operating System; however, this should *only* be considered as a last step (if you cannot install a 64-bit version of
 Microsoft Office or any 64-bit Drivers).

Overview of ODBC

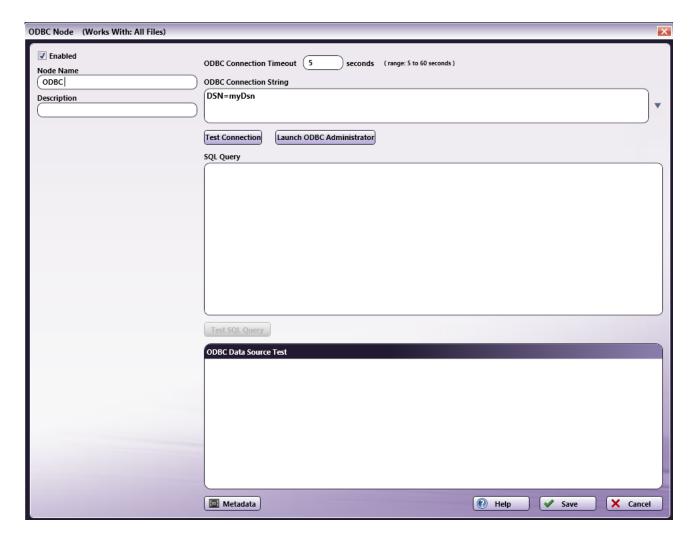
The following section provides brief definitions of ODBC and its infrastructure.

- **ODBC.** ODBC is the open standard method for connecting applications to database servers for the purposes of accessing data. For example, ODBC allows Dispatcher Phoenix users to connect transparently to a data source at the MFP panel.
- Data Source. Data that is used by an application. Examples include a SQL Server database or a Microsoft Access database.
- **ODBC Drivers.** In order for databases to be accessible to applications like Dispatcher Phoenix, drivers must be installed on the client system where the application resides. The ODBC driver connects to the data source, translates the standard SQL statements into syntax that the data source can process, and returns any requested data to the application. When you connect to a data source from an application through an ODBC driver, the driver makes the connection for you, either locally or across a network.

Using the Dispatcher Phoenix ODBC Node

The ODBC node resembles the following illustration:

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Do the following:

- Enter a name to identify this specific configuration in the Node Name field.
- Enter a description for the node in the **Description** field.
- Specify a time period (in seconds) for the connection to be established before ending the attempt in the ODBC Connection Timeout field.
- Enter a connection string to connect to the appropriate data source in the **ODBC Connection String** area. The application comes with numerous sample connection strings that you can use to help you get started. Click on the **down** arrow to view and select from a list of strings. If you are uncertain about how to enter this information, refer to the documentation for your ODBC Driver and/or database.
- To make sure that the connection string you entered is valid, select the Test Connection... button.
- If the connection is valid, data will appear in the ODBC Data Source Test area.
- If the connection is invalid, error messages will appear in the ODBC Data Source Test area.
- To manage database drivers and data sources, select the **Launch ODBC Administrator** button. Refer to Microsoft Windows documentation for more information on that dialog box.
- To submit SQL queries to the data source, enter SQL statements in the **SQLQuery** area.

Note: While SQL is standardized, there may be driver-specific deviations to account for how one database operates.

- You can use metadata within your SQL queries. To help you integrate these variables, you can click on the Metadata button, which will open up
 the Metadata Browser window. The Metadata Browser window lists all metadata included in the workflow. From the Metadata Browser window,
 you can drag-and-drop metadata into the ODBC window.
- To make sure your SQL statements are retrieving the correct records from the data source, select the **Test SQL Query** button. Note that you can add form variables to the SQL query.

Associating Data from an ODBC Data Source to a File

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You can retrieve data from an ODBC data source to be associated with incoming files using the SELECT statement in your SQL query. You can also retrieve specific data from a data source based on the results of a query that uses metadata from the workflow, such as OCR zones, Bates stamps, barcodes, and index form fields. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Once the data is retrieved from the data source, it is attached to the files as ODBC metadata for future use in the workflow.

Syntax for ODBC metadata is {odbc:[name of variable[page number]]} (e.g., {odbc:address[1]}). When referencing workflow metadata in SQL queries, you must specify a page number in brackets.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

To retrieve all records:

```
SELECT \* from [table name]
```

To retrieve select records based on a specific condition:

```
SELECT [column] FROM [table name] WHERE [column]='[metadata]'
```

Note: Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the SELECT statement:

Sample Data Source:

Last - First - Address

```
Doe - John - jdoe@gmail.com

Doe - Jane - janedoe@gmail.com

Smith - Jane - jsmith@hotmail.com

Crockett - Davey - dcrockett@aol.com
```

An OCR zone named "last" has been created to extract last names from incoming documents (using the Advanced OCR node). With the ODBC node, you can retrieve the email address found in a data source for the last name that appears on the document (extracted using the Advanced OCR process). The email address that is found via the ODBC node is attached to the file as ODBC metadata and can then be used in the Email Out node to send the documents to the correct email destination.

To retrieve the email address found in the Address column when the "last" OCR zone metadata {zone:ocr.last} returns "Doe," use the following statement:

```
SELECT [address] FROM [customers] WHERE [Last]='{ocr:zone.last[1]}'
```

Updating Data Within an ODBC Data Source

Useful for record keeping, you can also update data in an ODBC data source based on other metadata in the workflow, such as OCR zones, Bates stamps, barcodes, and index form fields, using the UPDATE statement in your SQL query. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

Syntax to use for Update statements:

```
UPDATE [table] SET [column]= 'metadata' WHERE [column name]='metadata';
```

Notes:

- Update statements do not produce metadata.
- When referencing workflow metadata in SQL queries, you must specify a page number in brackets (e.g., {bates.YourStamp[1]}.
- Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the UPDATE statement:

Sample Data Source:

File - Count

xyz - 1

abc - 2

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```
rty - 3
```

vui - 4

You can update a column in the 'customers' table when the file name of the incoming document matches another column in the table. For example, every time the "xyz" file is scanned, the count in the "Count" column increases by 1 to record how many times that file has been scanned.

Use the following statement:

```
UPDATE customers SET count=count+1 WHERE file='{file:name}';
```

Inserting Data Into an ODBC Data Source

You can also insert new records into an ODBC data source based on other metadata in the workflow using the INSERT INTO statement in your SQL query. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

Syntax to use for Insert Into statements:

```
INSERT INTO [table] [column1, column2,...] VALUES [value1, value2, ...];
```

Notes:

- · Insert statements do not produce metadata.
- When referencing workflow metadata in SQL queries, you must specify a page number in brackets (e.g., {bates.YourStamp[1]}.
- · Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the INSERT statement:

Sample Data Source (table name is 'files'):

File - Count

abc - 1

def - 2

ghi - 3

jkl - 4

You can insert a new record with the following data of 'mno' and '5' into the 'files' table, using the following statement:

```
INSERT INTO files (File, Count) VALUES ('mno', 5);
```

Document Manipulation

Advanced Bates Stamp



Advanced

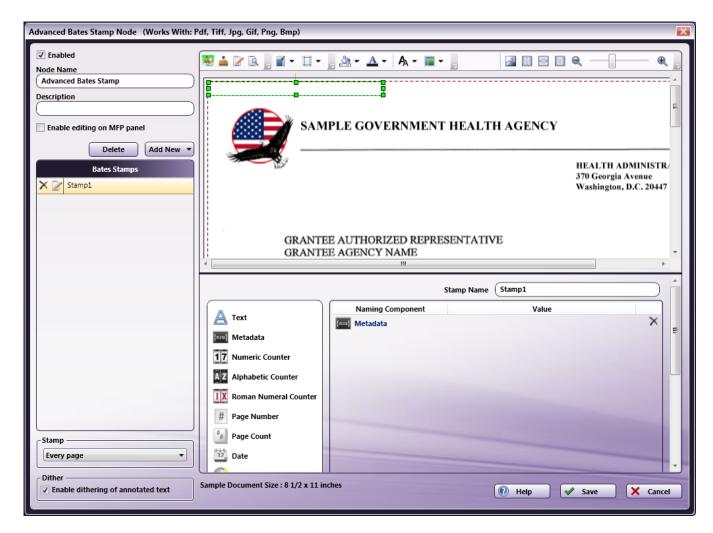
The Advanced Bates Stamp node is used to create one or more customized stamps and position them on scanned image files. These stamps can include combinations of a wide variety of naming components, such as sequential numbers, text, dates, time, metadata, etc.

With this node, stamps can be positioned vertically or horizontally anywhere on the page. Other advanced positioning and formatting options are also available, including shrinking the size of the page content and shifting the content's position on the page to make room for stamps. This node works with TIFF, JPG, GIF, PNG, BMP, and PDF files.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the Advanced Bates Stamp Node properties window, add a process node for **Advanced Bates Stamp** onto the Workflow Builder canvas and double-click on it. The Advanced Bates Stamp node window resembles the following illustration:

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Click for more information on...

The Bates Stamp List

The Edit Stamps area

The Components area

Tool bar icons

Creating a Bates Stamp

Bates Stamp naming components

Editing a Bates Stamp

Bates Stamp List

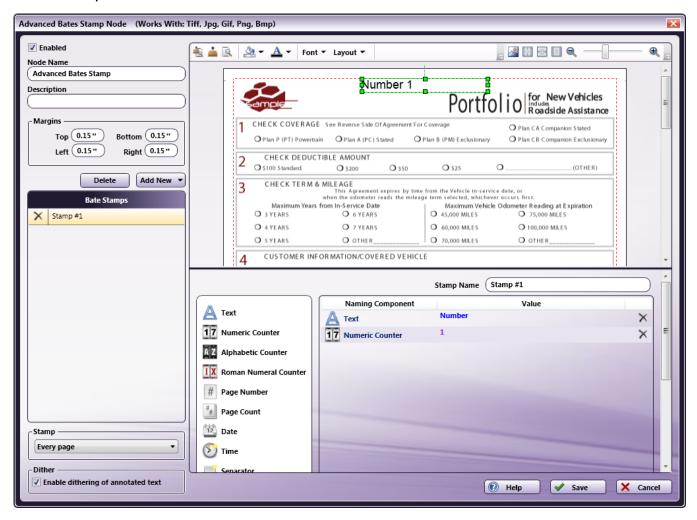
In the Bates Stamp list area, you can do the following:

- Arrange the order of the stamps. When working with multiple stamps that overlap each other on the page, you can reorder the stamps by dragging-and-dropping the stamps listed.
- Edit the name of a stamp. To change the name of a stamp, either click on the Edit icon next to the stamp's name, or double-click on the name.
- **Delete the defined stamp.** To delete the stamp, either click on the **Delete** icon next to the stamp's name, or select the stamp in the Bates Stamp List and press the **Delete** key on your keyboard. A confirmation message will appear to ensure that you really want to delete the stamp.



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Edit Stamps Area



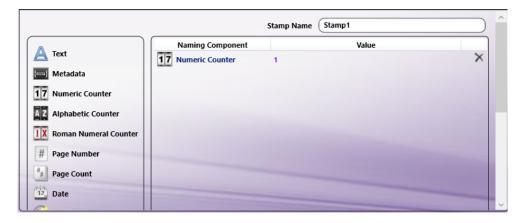
The Edit Stamps area displays a sample document on which the defined Bates Stamps appear. On the sample document, margins are displayed in red and the page borders are displayed in blue. The icons on the top left hand side of the tool bar can be used to customize stamps. You can also do the following:

- Resize a stamp's bounding box by selecting the bounding box in the Edit Stamps area and dragging the appropriate handle(s) until the box is the desired size.
- Rotate a stamp's bounding box by clicking on the bounding box in the Edit Stamps area and dragging the rotation handle at the top of the box until the box is correctly angled.
- Move a stamp's bounding box to a new location by clicking on the bounding box in the Edit Stamps area and then dragging the box to its desired position. You can also select the stamp and then use the arrow keys on your keyboard to move it.
- Select multiple stamps in a rectangular area by dragging a marquee over the stamps that you want to select using your mouse. Note that you must start this from either outside the sample document, or, if page content has been shifted, from any white space. Alternatively, you can select multiple stamps by selecting one stamp, holding down the Shift key, and selecting another.
- To select all the objects in a rectangular area, use the Selection tool to drag a marquee over the objects you want to select.
- Delete a stamp by selecting it and pressing the Delete key on the keyboard. A confirmation message will appear.
- Shift the sample content by selecting the sample document and dragging it with your mouse (or using the arrow keys on your keyboard to move it).
- · View your stamps on a different sample document by clicking on the Upload icon on the tool bar.

Note: All images in this area are displayed at 96 dpi. If a high-resolution image is uploaded as a sample document, you might notice a difference in the quality of the document when previewing it in this window.

Components Area

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The Components area is the section of the Advanced Bates Stamp node window where Bates Stamps can be designed. All of the naming components that can be used to create a Bates Stamp are listed as icons on the left-hand side. Drag and drop these icons from the list to the main part of the Components area to design your stamp. In addition, this area includes a **Stamp Name** field in which you can edit the name of the stamp if necessary.

A results area, provided at the bottom of the window, allows you to see the components that you've already defined, as in the following illustration:



Note: Roman Numeral counters are displayed as numeric values in the results area; however, converted Roman Numeral numbers are displayed correctly in the Edit Stamps area.

Tool Bar

The tool bar at the top of the window allows you to configure the appearance of the stamp, the appearance of the page content, and the properties of the actual window itself. Any changes you make to the view of the window will remain in effect the next time you open this window.

When using the drop-down palettes on the tool bar, pressing the **Enter** key or clicking anywhere outside of the palette will save those changes in the Edit Stamps area. Note that some of the options available on the tool bar are designed to be used with the Edit Stamps area; the Components area will not be affected by them.

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Icons	Descriptions
4	Show both Edit Stamps and Component areas. This is the default setting.
<u></u>	Show the Component area only in the window.
<u></u>	Show the Edit Stamps area only in the window.
2	Show Print Preview . Clicking on this icon displays what the final output of the stamp on the sample document would look like. The content of the stamp cannot be formatted in Print Preview.
*	Shrink and shift the content of the page.
□-	Specify margins for the page.
	Choose a color for the background of the stamp by choosing from the drop-down color palette or entering a hexadecimal color code in the blank field provided. In addition, you can use the Opacity sliding bar to specify the transparency of the background color.
Constant Con	Choose a color for the text by choosing on the drop-down color palette or entering a hexadecimal color code in the blank field provided. In addition, you can use the Opacity sliding bar to modify the transparency of the text. A fully transparent (invisible) text color is useful if you want to add an incremental counter without modifying the actual document.
To a second	Customize the text by choosing various options on the Font drop-down palette. You can choose font type, font size, whether the font is bold and/or italicized, the justification of the text within the bounding box (left, center, right), and the alignment of the text within the bounding box (top center, center, bottom center). In addition, you can specify the orientation of the text by choosing either the Horizontal or Vertical radio button.
The second secon	Customize the layout of the bounding box by specifying various options on the Layout drop-down palette. Note that these changes can also be made manually by resizing or moving the bounding box in the Edit Stamps area. To specify the width of the bounding box, enter the correct value in pixels in the Width field. To specify the height of the bounding box, enter the correct value in pixels in the Height field. To specify the placement of the bounding box from the left and/or top of the document, enter the correct values in pixels in the Left and/or Top fields. To specify the angle for the bounding box, use the Angle sliding bar or enter the correct value in the blank field provided.
<u>~</u>	Find and upload another sample document to use in the Edit Stamps area.
鬱	Revert the preview sample document to its original size. Keyboard shortcut: Ctrl + 1 .
	Stretch the sample document to fit the width of the Edit Stamps area. Keyboard shortcut: Ctrl + 2 .
	Display the sample document so that it fits completely in the Edit Stamps area. Keyboard shortcut: Ctrl + 3 .
a —] — a	Zoom in and out (using either the magnifying glass icons or the sliding bar). Keyboard shortcuts: Press Ctrl and + to zoom in. Press Ctrl and - to zoom out.

Note: If a stamp containing either a colored background or colored text is applied to a black and white document, the color will be converted to black and white on output (even though the color will appear in the Edit Stamps area).

Using the Advanced Bates Stamp Window

On the Advanced Bates Stamp window, you can fully customize and organize Bates Stamps. When setting up the Bates Stamps, make sure you do the following:

- Check the **Enabled** box so that the node will be processed when the workflow runs. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not be checked for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Advanced Bates Stamp node.

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- In the **Description** field, enter a description for the Advanced Bates Stamp node. This field is not required; however, it can be useful for clarification. If the description is long, you can hover the mouse over the field to read its entire contents.
- Check the Enable editing on MFP panel box to allow users to customize the Bates Stamp at the MFP Panel.
- When you are done defining or modifying the Bates Stamp, select the **Save** button to keep your Bates Stamp definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

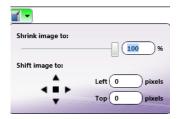
Uploading Sample Documents

Clicking on the **Upload** icon on the tool bar allows you to upload your own sample document to use as a preview when configuring your stamps. The application provides you with five sample documents of various sizes (**A4**, **Letter-Portrait**, **Letter-Landscape**, **Legal**, **and Tabloid**) that you can also use. If you are uploading your own document, note that PDF files cannot be used as sample documents.

When you click on the **Upload** icon, a "Select an image" browse folder will appear from which you can choose the appropriately sized document.

Note: The sample document must be at least ½ inch by ½ inch.

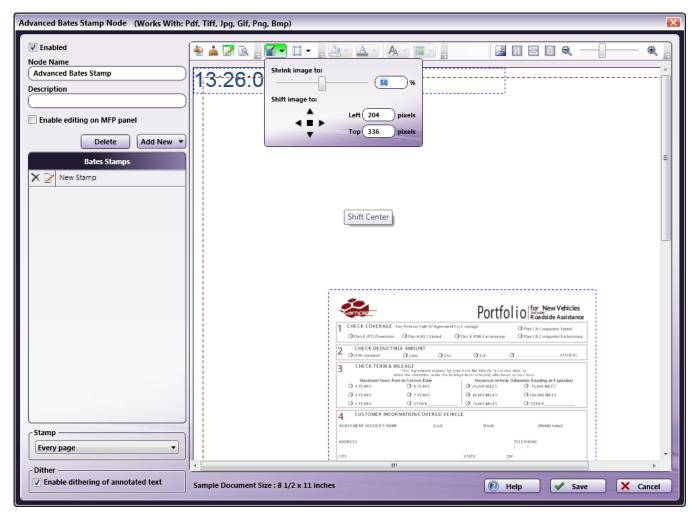
Shrinking and Shifting the Content of the Page



To make sure that the Bates Stamps do not obscure important information on the page, it may be necessary to shrink and shift the contents of the page when customizing your stamps.

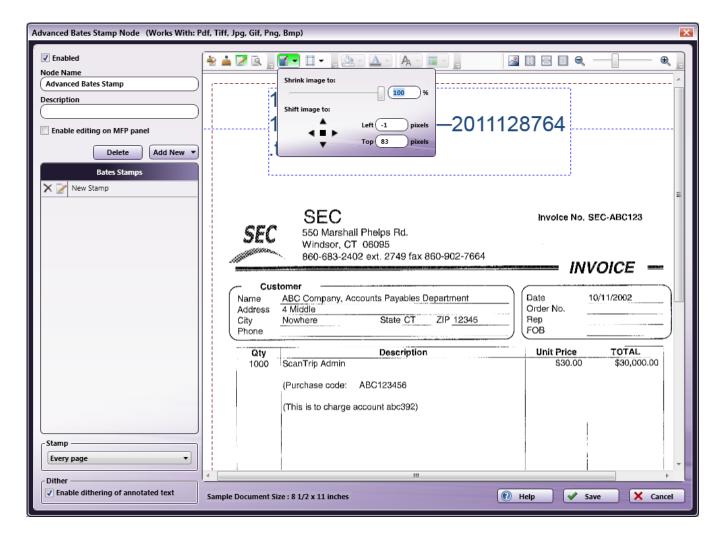
- To shrink the content of the page, click on the **Shrink** icon on the tool bar; then use the **Shrink image to** sliding bar to specify the percentage that the contents should shrink to. You can also enter a percentage amount in the field to the right of the sliding bar.
- To shift the position of the content, use the **Shift image to: up, down, left, right arrows**, enter an amount (in pixels) for the positions in the **Left** and **Top** fields, or select the content and drag using the mouse. To center the content on the page, click the **square in the center**. Shifting positions will clip the content when it goes outside the page boundaries.
- Clicking once on an arrow moves the content one pixel at a time. However, if you'd like to move faster, you can click on an arrow and hold the
 left mouse button down. To increase your speed again, hold the left mouse button down after clicking on an arrow and press either the Ctrl or
 Shift key. The fastest way to shift content is to click on an arrow, keep the left mouse button down, and press both the Ctrl + Shift keys.

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In the next illustration, the content was shifted down:

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Specifying Margins

If you want to change the margins of your documents, click on the **Margins** icon from the tool bar to enter new values in the **Top, Bottom, Left, Right** fields. Note that you can position a stamp beyond the limits of these page margins if desired. Margins are provided for reference, and also are useful when determining the layout of your stamp(s). The unit of measurement for margins is inches.

Note: If an incoming document contains pages that are smaller than the specified page margins on this node, the file will go out on error if those pages are selected to be stamped.

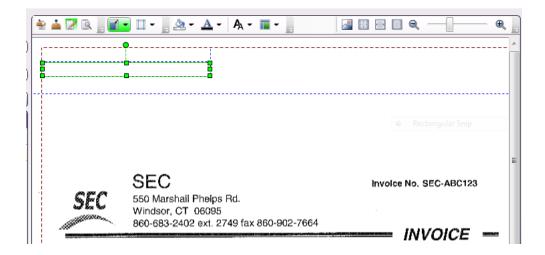
Creating a Bates Stamp

To create a Bates Stamp, do the following:

- 1. Select the Add New button. A drop-down palette will appear, on which you should do the following:
 - Enter a name for the stamp in the **Stamp Name** field. Note that this name can also be edited in the **Components** area.
 - Select a starting position for the stamp by choosing one of the nine predefined locations under **Default anchor position**. Note that, once defined, you can modify this location by either using the **Layout** drop-down palette or moving the bounding box with your mouse in the **Edit Stamps** area.

If you choose to position a new stamp in the same location as an existing stamp, the new stamp will be placed immediately below the existing one, as in the following illustration:

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- Select either the Horizontal or Vertical radio button to specify the orientation of the stamp's bounding box.
- Select the Save button when you are done. The newly created Bates Stamp will now appear in the Bates Stamp List.
- Select the Cancel button to exit the drop-down palette without saving any changes.
- 2. Specify the pages that should be stamped using the Stamp pull-down menu. Options include:
 - Every page Stamp on every page.
 - Every even page Stamp on even pages.
 - Every odd page Stamp on odd pages.
 - First page Stamp on the first page only.
 - Last page Stamp on the last page only.
 - **Define your own page range** Define a custom page range for the stamps. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to stamp pages 1, 2, 5, 6, and 7.
 - Specify a specific stamping sequence within a range of pages by using parentheses. For example, enter 1-10(3) to stamp every third
 page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to stamp pages 15-20 of a 20-page document.

Other examples include:

To stamp pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).

To stamp pages 10-15 of a 20-page document, enter: 10-end(-5).

To stamp every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).

To stamp pages 15-20 of a 25-page document, enter: end(-10)-end(-5).

To stamp pages 10-20 of a 20-page document, enter: end(-10)-end.

Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., stamping pages 10-20 for a 3 page document), then the file will go out on error.

- 3. Check the Enable dithering of annotated text box to improve the clarity of text, if necessary.
- 4. Customize the stamp by dragging and dropping naming components into the Components main area. They can be reordered at any time by dragging-and-dropping them in this area.

Bates Stamp Metadata

Once a Bates stamp has been created, it can be referenced by other nodes in the workflow. The syntax for Bates stamp referencing is {bates: name of stamp [<page>]}. You can also use the Metadata Browser window to choose the Bates stamp variable, as in the following illustration:

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Positioning and Sizing Bates Stamps for Different Document Sizes

When configuring Bates Stamps, keep in mind that the *margins* and *font size* that you specified will remain the same, regardless of the dimensions of the images that the stamps will be applied to; however, the size and position of the stamp's bounding box, which indicates the maximum area in which text can be placed, will be adjusted proportionally to the document size.

For example, a stamp with a font size of 12 pt that is centered in a 180 x 50 pixel bounding box and positioned at the top left of an 8 $\frac{1}{2}$ x 14 sample document will appear much differently when applied to a 5 x 7 document. The stamp's bounding box will shrink and the text will no longer fit completely inside the box.

In the following illustration, a stamp's bounding box was originally configured for an 8 $\frac{1}{2}$ x 11 document; once a much smaller document was processed through the Advanced Bates Stamp node, much of the stamp was lost:

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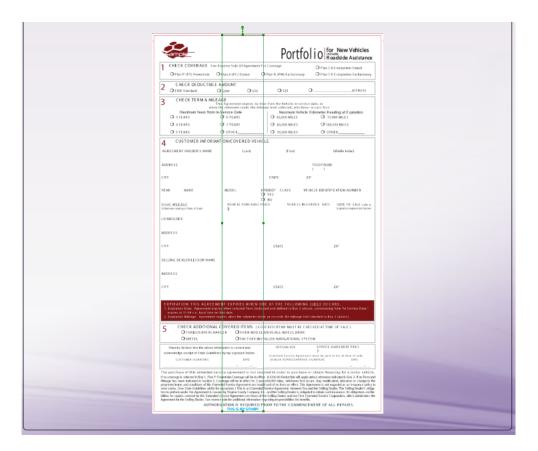


The stamp is cut off when applied to DOC #2, a smaller page size.

To support a wide range of different-sized documents, try the following:

- Layout your stamps on a variety of documents by uploading other sample documents into the Edit Stamps area. The sample image should be representative of the documents which are to be processed.
- Adjust the layout of the bounding box's height and width to ensure that the bounding box remains large enough to display all of the stamp's text. If you want to make sure that your text always remains visible, stretch the height of the bounding box to fit the document's height, as in the following illustration:

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Note: With this adjustment, adding color to the background of your stamp may be problematic since color would be applied to the entire area of the bounding box as it is resized proportionally.

Specifying Absolute Measurements for the Bounding Box

To ensure that the bounding box is the same size and position regardless of the document being processed, check the **Use Absolute**Measurements box on the Layout palette. Once this option is enabled, the stamp will not scale but will remain the same. Note that this may mean that if a document with a different layout orientation or size is processed, the stamp may be positioned off the page.

Bates Stamp Naming Components

Text

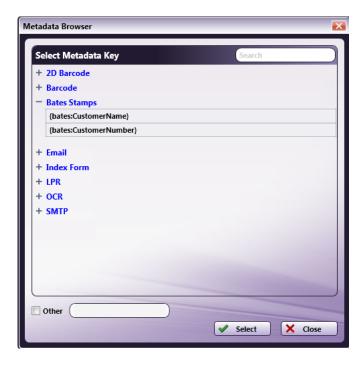
Adds text to your stamp. Once you drag-and-drop the Text icon to the Naming Components main area, double-click on the icon to enter the appropriate text.

Example: Type Document ID to include the static text of "Document ID" to the stamp.

Metadata

Adds metadata to your stamp from other nodes in the workflow as well as system-defined metadata such as date, file, and system variables. Once you drag-and-drop the Metadata icon to the Naming Components main area, double-click on the icon and then click on the Select Metadata Key button to access the Metadata Browser, as in the following illustration:

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Note: The Metadata Browser will only list system-defined variables and metadata from other nodes that are used in the workflow. If you have not added any other nodes, only system-defined variables (Date, File, System, User) will appear.

On the Metadata Browser, you can do the following:

• Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you are interested in LPR metadata, click on the + sign next to LPR and the following expandable list will appear:



- Collapse the list by clicking on the sign next to the appropriate metadata.
- Choose metadata to add to the stamp by clicking on the metadata and clicking on the Select button. At this point, the Metadata Browser will close and you will return to the Advanced Bates Stamp window.
- Specify a page-level and/or occurrence number for the metadata reference by clicking on the Custom Metadata check box, dragging-dropping the metadata from the list above into the empty field provided; then entering the correct syntax.
- Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.

Example: Add a stamp on every page with LPR metadata that lists the queue name of the LPR In node.

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Numeric Counter

Adds a numeric, sequential counter to your stamp. Once you drag-and-drop the Numeric Counter icon to the Naming Components main area, double-click on the icon to customize the counter. On the fields that appear, do the following:

- Enter an appropriate starting value for the counter in the Start Value field. The Start Value supports up to 255 characters.
- Enter an appropriate ending value for the counter in the End Value field. The End Value supports up to 255 characters.
- Choose either **Increment By** or **Decrement By** in the drop-down list to specify whether or not the counter should increase or decrease as the node is processed; in the empty field next to it, enter the appropriate value by which the counter should increment or decrement.

Notes:

- If you select the Increment By option, the End Value must be greater than the Start Value.
- · If you select the Decrement By option, the Start Value must be greater than the End Value.
- To pad the counter with leading characters, such as spaces, zeros, or other symbols, choose from the Leading Character drop-down list.
- To disable the counter from cycling, uncheck the **Cycles** box. This means that the counter will not cycle automatically, and the file(s) will go out on error once the specified End Value has been reached. At this point, the counter's status changes to EXPIRED.
- To change how the counter will be determined, you can check the **Document Level Counter** box. With this option enabled, the counter will
 continue with each successive document rather than each page. This is helpful if you want to generate the same unique ID for each page within
 a document. For example, with this option enabled, all pages in doc1 would be stamped with 0001, all pages in doc2 would be stamped with
 0002. etc.

The default behavior applies a sequential counter to each page of each document.

• The **Counter Status** area displays the current status of the counter, with its current value. To reset a counter to its original "Start Value" after the workflow has run at least once, select the **Reset** link. To lock a counter so that it cannot be reset, select the **Lock** link.

Example: Specify a stamp on every page with a numeric counter that starts with 1 and ends with 999999999 in increments of 10. Enable the Leading Zeros option. The third page of the processed file would have a stamp of 000000021.

Alphabetic Counter

Adds an alphabetic counter to your stamp. Once you drag-and-drop the Alphabetic Counter icon to the Naming Components main area, double-click on the icon to customize the counter. On the fields that appear, do the following:

- Enter an appropriate starting value for the counter in the Start Value field. The Start Value supports up to 255 characters.
- Enter an appropriate ending value for the counter in the End Value field. The End Value supports up to 255 characters.
- Choose either **Increment By** or **Decrement By** in the drop-down list to specify whether or not the counter should increase or decrease as the node is processed; in the empty field next to it, enter the appropriate value by which the counter should increment or decrement. This field only accepts numeric input. For example, specifying an increment of 2 with a "Start Value" of A and an End Value of "Z" would produce "A, C, E, G, I..., etc."

Notes:

- · If you select the Increment By option, the End Value must be greater than the Start Value.
- If you select the Decrement By option, the Start Value must be greater than the End Value.
- To pad the counter with leading characters, such as spaces, zeros, or other symbols, choose from the Leading Character drop-down list.
- To disable the counter from cycling, uncheck the **Cycles** box. This means that the counter will not cycle automatically, and the file(s) will go out on error once the specified End Value has been reached. At this point, the counter's status changes to EXPIRED.
- To specify that the alphabetic counter be displayed in lowercase, check the **Lowercase Output** box.
- To change how the counter will be determined, you can check the **Document Level Counter** box. With this option enabled, the counter will
 continue with each successive document rather than each page. This is helpful if you want to generate the same unique ID for each page within
 a document. For example, with this option enabled, all pages in doc1 would be stamped with 0001, all pages in doc2 would be stamped with
 0002. etc.

The default behavior applies a sequential counter to each page of each document.

• The **Counter Status** area displays the current status of the counter, with its current value. To reset a counter to its original "Start Value" after the workflow has run at least once, select the **Reset** link. To lock a counter so that it cannot be reset, select the **Lock** link. With both the Reset and Lock actions, you will receive confirmation messages.

Example: Specify a stamp on every page with an alphabetic counter that starts with A and ends with ZZZZZ at increments of 5. Disable the Lowercase Output option and enable the Leading Spaces option. The third page of the processed file would have a stamp of K (with four spaces before it).

Roman Numeral Counter

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Adds a Roman Numeral counter to your stamp. Once you drag-and-drop the Roman Numeral Counter icon to the Naming Components main area, double-click on the icon to customize the counter. On the fields that appear, do the following:

- Enter an appropriate starting value for the counter in the Start Value field. The Start Value supports up to 255 characters.
- Enter an appropriate ending value for the counter in the End Value field. The End Value supports up to 255 characters.
- Choose either **Increment By** or **Decrement By** in the drop-down list provided to specify whether or not the counter should increase or decrease as the node is processed; in the empty field next to it, enter the appropriate value by which the counter should increment or decrement.

Notes:

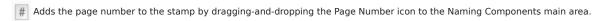
- If you select the Increment By option, the End Value must be greater than the Start Value.
- If you select the Decrement By option, the Start Value must be greater than the End Value.
- To pad the counter with leading characters, such as spaces, zeros, or other symbols, choose from the Leading Character drop-down list.
- To disable the counter from cycling, uncheck the **Cycles** box. This means that the counter will not cycle automatically, and the file(s) will go out on error once the specified End Value has been reached. At this point, the counter's status changes to EXPIRED.
- To specify that the Roman numeral counter be displayed in lowercase, check the Lowercase Output box.
- To change how the counter will be determined, you can check the **Document Level Counter** box. With this option enabled, the counter will
 continue with each successive document rather than each page. This is helpful if you want to generate the same unique ID for each page within
 a document. For example, with this option enabled, all pages in doc1 would be stamped with 0001, all pages in doc2 would be stamped with
 0002. etc.

The default behavior applies a sequential counter to each page of each document.

• The **Counter Status** area displays the current status of the counter, with its current value. To reset a counter to its original "Start Value" after the workflow has run at least once, select the **Reset** link. To lock a counter so that it cannot be reset, select the **Lock** link. With both the Reset and Lock actions, you will receive confirmation messages.

Example: Specify a stamp on every page with a Roman Numeral counter that starts with 20 and ends with 1 in decrements of 1. Disable the Lowercase Output option disabled. The third page of the processed file would have a stamp of XVIII.

Page Number



Example: For the fifth page in the processed file, the resulting stamp would be 5.

Page Count



🛂 Adds the total number of pages to the stamp by dragging-and-dropping the Page Count icon to the Naming Components main area.

Example: To add a stamp with the number of pages within the total number of pages in the processed file, use a combination of the Page Number, Text, and Page Count naming components. For the first page in a three page document, the resulting stamp would be 1 of 3.

Date

Adds the current date to the stamp. Once you drag-and-drop the Date icon to the Naming Components main area, double-click on the icon to customize the date's appearance.

- To add the month, date, and year, select the MM-dd-yyyy radio button.
- To add the month only, select the \boldsymbol{MM} radio button.
- To add the day only, select the **dd** radio button.
- To add the year only, select the **yyyy** radio button.

Example: If the MM option was selected and the file was processed in May, the resulting stamp would be 05.

Time

Adds the current time to the stamp. Once you drag-and-drop the Time icon to the Naming Components main area, double-click on the icon to customize the time's appearance.

- To add the hour, minutes, and seconds, select the **HH:mm:ss** radio button.
- To add the hour only, select the **HH** radio button.
- To add the minutes only, select the \boldsymbol{mm} radio button.

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- To add the seconds only, select the \boldsymbol{ss} radio button.

Example: If the HH option was selected and the file was processed at 2:00 p.m., the resulting stamp would be 14.

Separators

Adds a wide variety of separators to the stamp. Once you drag-and-drop the Separator icon to the Naming Components main area, double-click on the icon to choose the appropriate separator from the drop-down list. Options include:

Space
Colon (:)
Semi-colon (;)
Comma (,)
Tilde (~)
Exclamation point (!)
At sign (@)
Pound sign (#)
Dollar sign (\$)
Percent sign (%)
Period (.)

Example: Use a dash between a file name and a counter. The resulting stamp might be: doc1-00010.

File Name

Underscore (_)

Plus sign (+)
Dash (-)

Adds the name of the file to the stamp by dragging-and-dropping the File Name icon to the Naming Components main area.

Example: If the file name of the processed document was recordxxxx, the resulting stamp would be recordxxxx.

File Extension

Adds the extension of the file to the stamp by dragging-and-dropping the File Extension icon to the Naming Components main area.

Example: If the file extension of the processed document was JPG, the resulting stamp would include the words JPG.

File Size

Adds the size of the file (in bytes) to the stamp by dragging-and-dropping the File Size icon to the Naming Components main area.

Example: If the file size of the input file was 278KB, the resulting stamp would be 283926.

Image Width

Adds the width of the image to the stamp by dragging-and-dropping the Image Width icon to the Naming Components main area.

Example: If the width of the image file was 960 pixels in width, the resulting stamp would be 960.

Image Height

Adds the height of the image to the stamp by dragging-and-dropping the Image Height icon to the Naming Components main area.

Example: If the height of the image file was 300 pixels in height, the resulting stamp would be 300.

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Editing a Bates Stamp

Once a Bates Stamp has been created, you can select the Bates Stamp to edit by doing one of the following:

· Select it from the Bates Stamp List,

or

• Select the Bates Stamp's bounding box on the **Edit Stamps** area.

Advanced Bates Stamping at the Panel

Dispatcher Phoenix Bates stamps can be created and modified at the MFP panel. Any changes made to an existing Bates stamp at the panel will be automatically reflected in Dispatcher Phoenix as well.

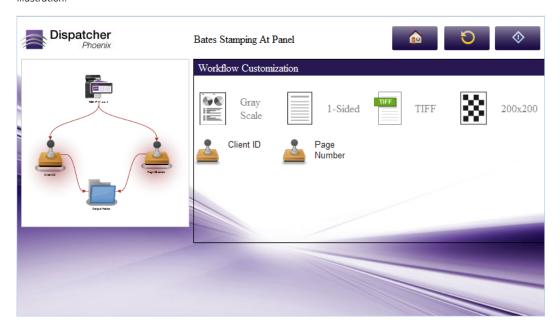
Note: Accessing the Advanced Bates Stamp feature is ONLY supported on MFPs running a Graphical User Interface.

Getting Started

To work with Bates stamps at the device panel, do the following:

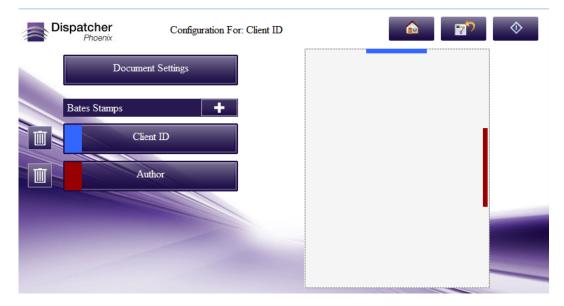
- 1. Configure your workflow to include a MFP Panel node and at least one Advanced Bates Stamp node. Make sure that the Advanced Bates Stamp node has the **Enable editing on MFP panel** option enabled.
- 2. Make sure that your workflow is running.

When you log into Dispatcher Phoenix and access the running workflow at the panel, you will see the Workflow Details screen, as in the following illustration:



To view, edit, and create new Bates stamps, tap on the icon of the Advanced Bates Stamp node that you are interested in. The Node Configuration screen will appear, as in the following illustration:

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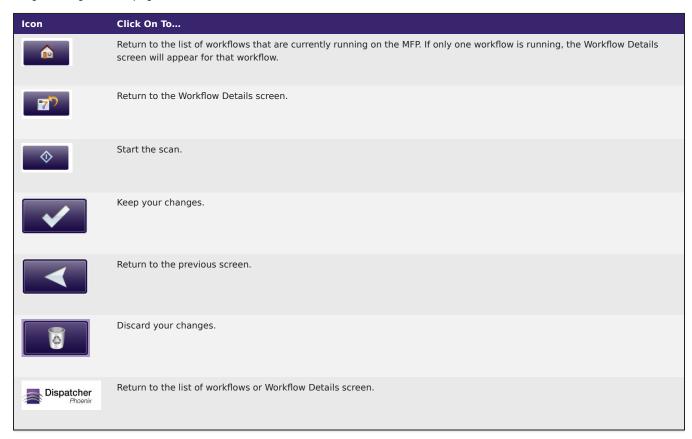
This screen displays the Bates stamps that have already been defined in the Advanced Bates Stamp node. A maximum of three Bates stamps are displayed on the screen. Up and down arrows are provided to navigate to additional Bates stamps.

On this screen, you can do the following:

- Tap the **Document Settings** button to modify the properties of the document and other stamping options.
- Tap the + button to add another stamp to the node.
- Tap on a specific **Bates stamp** to edit the components of an existing stamp.

Using Buttons

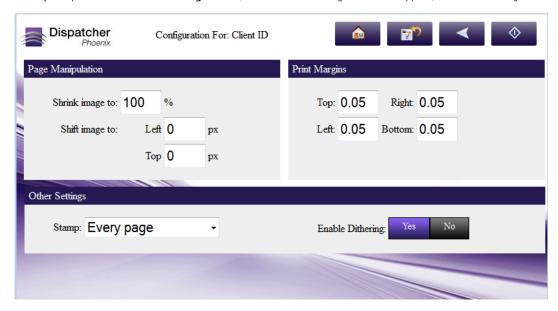
Most of the Advanced Bates Stamping screens on the MFP panel include buttons that will allow you to save or discard your changes, as well as navigate through the Stamping screens.



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Changing Document Settings

When you tap on the **Document Settings** button, the Document Settings screen will appear, as in the following illustration:



Do the following:

- To shrink the content of the page, enter the percentage that the contents should shrink to in the **Shrink Image to** box.
- To shift the position of the content, enter an amount, in pixels, for the positions in the **Left** and **Top** fields.
- To change the print margins of your documents, enter new values in the **Print Margins Top, Bottom, Left, Right** fields.
- Specify the pages that should be stamped using the **Stamp** pull-down menu. Options include:
 - **Every page** Stamp on every page.
 - **Every even page** Stamp on even pages.
 - Every odd page Stamp on odd pages.
 - First page Stamp on the first page only.
 - Last page Stamp on the last page only.
 - **Define your own page range** Define a custom page range for the stamps. Once you choose this option, an empty field will appear to enter the page range. See the "Advanced Bates Stamp" section for more information.
- Tap Dithering Yes or No buttons to enable or disable dithering.

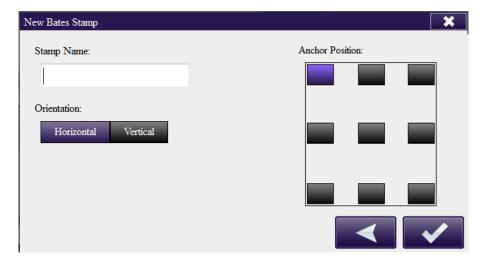
Configuring a Bates Stamp

You can add a new Bates stamp or edit an existing Bates stamp in the node.

Adding a New Bates Stamp

To configure a new Bates stamp, tap on the + button. The New Bates Stamp screen will appear, as in the following illustration:

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Do the following:

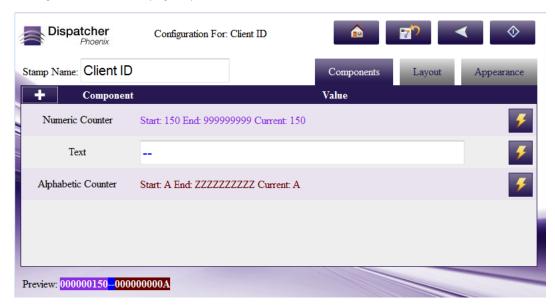
- In the **Stamp Name** field, enter a meaningful, identifying name for the Bates stamp.
- Specify the Bates stamp orientation using the Horizontal or Vertical buttons.
- In the Anchor Position box, tap on a button to specify a default anchor position for the newly added Bates stamp.

When done, a blank Stamp Configuration screen will appear. See the following section for more information on how to use that screen.

Editing an Existing Bates Stamp

To edit an existing Bates stamp, tap on a stamp listed under the Bates Stamp area on the Node Configuration screen.

The Stamp Configuration screen will appear. A maximum of five stamping components are displayed on the screen. Up and down arrows are provided to navigate to additional stamping components.



On this screen, you can either modify existing stamp components or add a new stamping component to the stamp.

On this screen, you can do the following:

- 1. Edit the name of the stamp in the **Stamp Name** field.
- 2. Select the **Layout** tab to modify the dimensions of the Bates Stamp.
- 3. Select the **Appearance** tab to modify the appearance of the Bates stamp.
- 4. Select the Action item icons next to each field to edit the component.
- 5. View a sample of what the defined Bates stamp would look like using the Preview area at the bottom of the screen.

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Edit Existing Stamp Components

To edit an existing stamp component, do one of the following:

• Tap on the component,

or

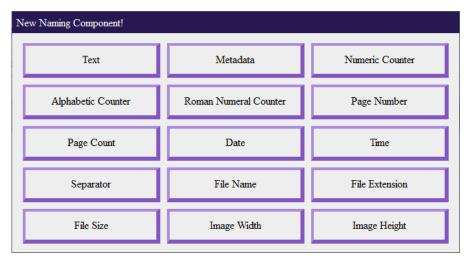
• Tap on the **Action** button.

When you tap on the **Action** button, a toolbar will appear, as in the following illustration:



Edit Existing Stamp Components

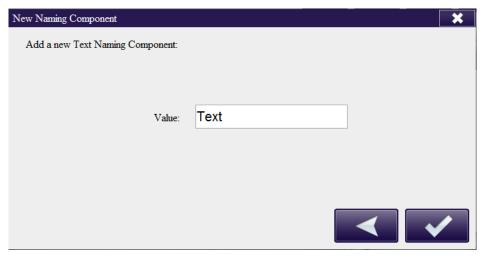
To add a new Bates stamp to the node, tap on the + icon. The New Naming Component screen will appear, listing all of the available stamp components that can be added to the Bates stamp, as in the following illustration:



Adding Text

To add text to the Bates stamp, do the following:

- 1. Tap on the **Text** button.
- 2. On the Text Component window, enter new text in the **Value** field.



Adding Metadata

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To add metadata to the Bates stamp, do the following:

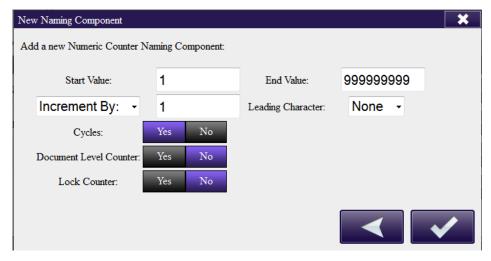
- 1. Tap on the Metadata button.
- 2. On the Metadata Component window, enter a variable in the Value field.



Adding a Numeric Counter

To add a new numeric counter to the Bates stamp, do the following:

- 1. Tap on the Numeric Counter button.
- 2. On the Numeric Counter window, do the following:
 - Enter an appropriate starting value for the counter in the **Start Value** field.
 - Enter an appropriate ending value for the counter in the **End Value** field.
 - Choose to either **Increment By** or **Decrement By** using the drop-down list provided; then enter the appropriate value by which the counter should increment or decrement.
 - $\circ \ \ \text{Pad a counter with leading characters by choosing from the \textbf{Leading Character} \ \text{drop-down list}.$
 - Choose whether or not the numeric counter should cycle automatically once the specified End Value has been reached by tapping on the Cycles Yes/No buttons.
 - Choose whether or not the counter should continue with each successive document or with each page by tapping on the **Document Level** Counter Yes/No buttons.
 - Choose whether or not to lock a counter so that it cannot be reset by tapping on the Lock Counter Yes/No buttons.

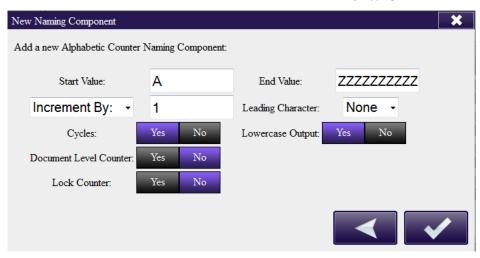


Adding an Alphabetic Counter

To add a new alphabetic counter to the Bates stamp, do the following:

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- 1. Tap on the Alphabetic Counter button.
- 2. On the Alphabetic Counter window, do the following:
 - Enter an appropriate starting value for the counter in the **Start Value** field.
 - Enter an appropriate ending value for the counter in the **End Value** field.
 - Choose to either **Increment By** or **Decrement By** using the drop-down list provided; then enter the appropriate value by which the counter should increment or decrement.
 - Pad a counter with leading characters by choosing from the Leading Character drop-down list.
 - Choose whether or not the alphabetic counter is displayed in upper or lowercase letters by tapping on the Lowercase Output Yes/No buttons.
 - Choose whether or not the numeric counter should cycle automatically once the specified End Value has been reached by tapping on the Cycles Yes/No buttons.
 - Choose whether or not the counter should continue with each successive document or with each page by tapping on the **Document Level** Counter Yes/No buttons.
 - Choose whether or not to lock a counter so that it cannot be reset by tapping on the Lock Counter Yes/No buttons.

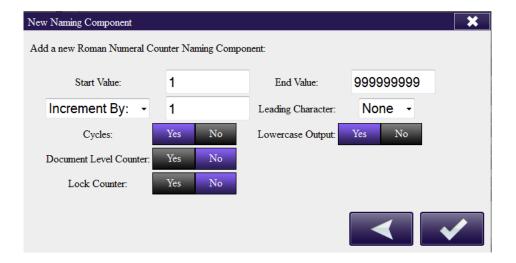


Adding a Roman Numeral Counter

To add a new Roman numeral counter to the Bates stamp, do the following:

- 1. Tap on the Roman Numeral Counter button.
- 2. On the Roman Numeral Counter window, do the following:
 - $\circ~$ Enter an appropriate starting value for the counter in the Start Value field.
 - $\circ~$ Enter an appropriate ending value for the counter in the ${\bf End~Value}$ field.
 - Choose to either Increment By or Decrement By using the drop-down list provided; then enter the appropriate value by which the counter should increment or decrement.
 - · Pad a counter with leading characters by choosing from the Leading Character drop-down list.
 - Choose whether or not the Roman numeral counter is displayed in upper or lowercase letters by tapping on the Lowercase Output Yes/No buttons.
 - Choose whether or not the numeric counter should cycle automatically once the specified End Value has been reached by tapping on the Cycles Yes/No buttons.
 - Choose whether or not the counter should continue with each successive document or with each page by tapping on the **Document Level** Counter Yes/No buttons.
 - Choose whether or not to lock a counter so that it cannot be reset by tapping on the Lock Counter Yes/No buttons.

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Adding a Page Number

To add a page number to the Bates stamp, do the following:

- 1. Tap on the ${\bf Page\ Number}$ button.
- 2. On the Page Number Component window, the {page:number} variable will be read-only.
- 3. Tap on the **Save** button to add a Page Number to the Bates stamp.

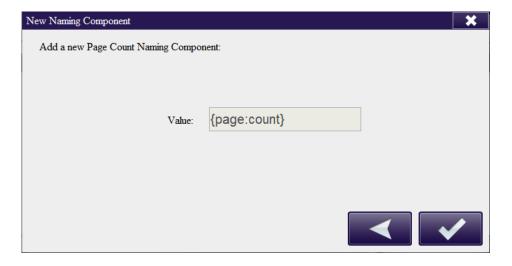


Adding a Page Count

To add the page count to the Bates stamp, do the following:

- 1. Tap on the Page Count button.
- 2. On the Page Count Component window, the {page:count} variable will be read-only.
- 3. Tap on the Save button to add the Page Count to the Bates stamp.

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Adding the Date

To add the date to the Bates stamp, do the following:

- 1. Tap on the **Date** button.
- 2. On the Date Component window, choose the appropriate format for the date from the **Value** drop-down list.

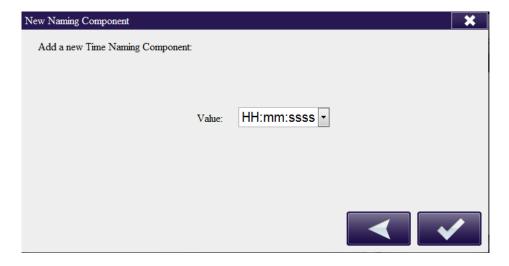


Adding the Time

To add the time to the Bates stamp, do the following:

- 1. Tap on the **Time** button.
- $2. \ \ On the \ Time \ Component \ window, \ choose \ the \ appropriate \ time \ format \ from \ the \ \textbf{Value} \ drop-down \ list.$

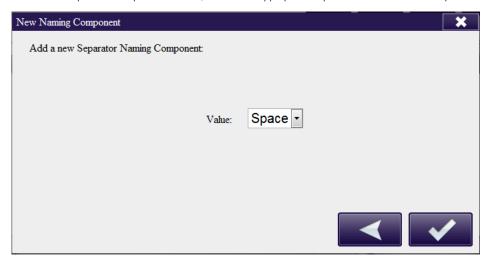
Konica Minolta 389 / 1597



Adding a Separator

To add a separator to the Bates stamp, do the following:

- 1. Tap on the **Separator** button.
- 2. On the Separator Component window, choose the appropriate separator from the Value drop-down list.



Adding File Name

To add a file name to the Bates stamp, do the following:

- 1. Tap on the ${\bf File\ Name}$ button.
- 2. On the File Name Component window, the {file:name} variable will be read-only.
- 3. Tap on the ${\bf Save}$ button to add the file name to the Bates stamp.

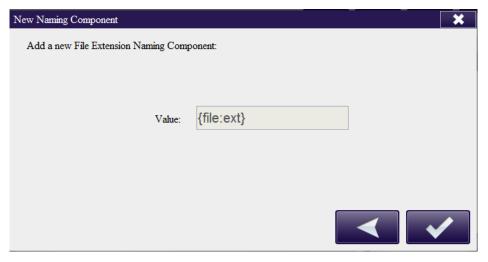
Konica Minolta 390 / 1597



Adding File Extension

To add a file extension to the Bates stamp, do the following:

- 1. Tap on the **File Extension** button.
- 2. On the File Extension Component window, the {file:ext} variable will be read-only.
- 3. Tap on the **Save** button to add the file extension to the Bates stamp.



Adding File Size

To add a file size to the Bates stamp, do the following:

- 1. Tap on the **File Size** button.
- 2. On the File Size Component window, the $\{\mbox{file:size}\}$ variable will be read-only.
- 3. Tap on the Save button to add the file size to the Bates stamp.

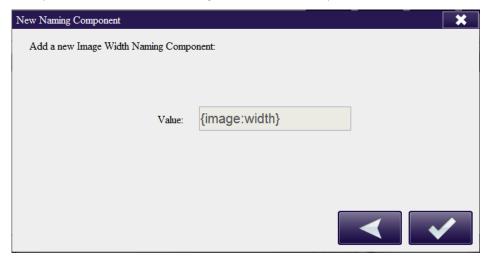
Konica Minolta 391 / 1597



Adding Image Width

To add the image width to the Bates stamp, do the following:

- 1. Tap on the $\pmb{\mathsf{Image Width}}$ button.
- 2. On the Image Width Component window, the {image:width} variable will be read-only.
- 3. Tap on the **Save** button to add the image width to the Bates stamp.



Adding Image Height

To add the image height to the Bates stamp, do the following:

- 1. Tap on the **Image Height** button.
- 2. On the Image Height Component window, the {image:height} variable will be read-only.
- 3. Tap on the Save button to add the image height to the Bates stamp.

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Modifying the Layout of the Bates Stamp

To modify the layout of the Bates stamp, tap on the Layout tab on the Node Configuration screen. The following screen will appear:



Do the following:

- In the **Height** and **Width** fields, enter an appropriate value (in pixels) for the stamp's bounding box.
- In the Location Top and Left fields, enter an appropriate value (in pixels) for the stamp's bounding box on the document.
- In the **Angle** field, enter a rotating angle for the stamp's bounding box.
- To ensure that the bounding box is the same size and position regardless of the document being processed, check the Use Absolute
 Measurements Yes/No buttons. Once this option is enabled, the stamp will not scale but will remain the same. Note that this may mean that if
 a document with a different layout orientation or size is processed, the stamp may be positioned off the page.

Modifying the Appearance of the Bates Stamp

To modify the appearance of the Bates stamp, tap on the **Appearance** tab on the Node Configuration screen. The following screen will appear:

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Do the following:

- · Specify color:
 - In the Background Color field, enter the value of the color that you'd like to see in the background of the stamp's bounding box.
 - In the Foreground Color field, enter the value of the color that you want for the content of the stamp.
 - For both Background and Foreground, enter its opacity (decimal value between 0-1) in their respective Opacity fields.
 - You can type any HTML color name into the field and it will be automatically converted to the appropriate HTML color code. Basic color names are aqua, black, blue, fuchsia, gray, green, lime, maroon, navy, olive, purple, red, silver, teal, white, and yellow.
- Using the **Horizontal Alignment** and **Vertical Alignment** buttons, choose the stamp content's horizontal and vertical alignments (Left/Center/Right or Top/Center/Bottom).
- In the Font drop-down lists, choose a font family and font size for the content of the stamp.
- Using the **Orientation** buttons, choose an orientation for the stamp (Horizontal or Vertical).
- Using the **Bold** and **Italic** Yes/No buttons, choose whether you'd like to bold or italicize the stamp's content.

Annotaate



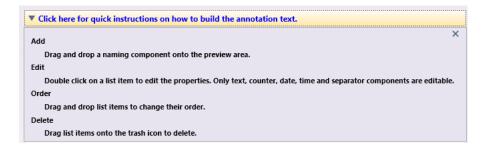
One of the many processes that can be performed automatically is **Annotation**. Annotation works with TIFF, JPG, GIF, PNG, BMP, and PDF files. You define exactly what is to be added to each file for annotation.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the **Annotation Node** window, add a process node for **Annotate** and double-click on it. The components on the left, similar to those used for **Renaming**, are dragged to the **Preview** pane to define the annotation text.

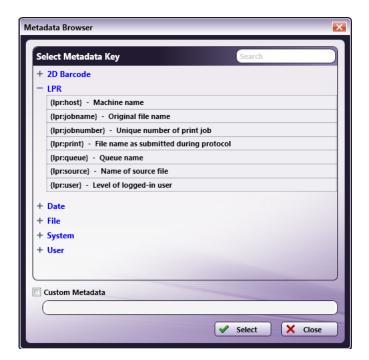
- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Annotate node.
- In the **Description** field, enter a description for the Annotate Node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- Click on the top menu bar above the Annotation area to get instructions on how to create the annotation text, as in the following illustration:

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Once you have found the information you need, click on the menu bar again to hide the instructions.

- In the Annotation Naming Components area, you can drag the following components to the Annotation area:
 - **Text*** Enter any text string you want included in the annotation. With this component, you can also use file level dynamic variables. For example, type {file:fullname} to include the file's entire file name in the annotation.
 - **Metadata** Double-click on the Metadata naming component and then click on the **Select Metadata Key** button to launch the Metadata Browser window, which displays system-defined variables and metadata from other nodes that are used in the workflow. If you have not added any other nodes, only system-defined variables (Date, File, System, User) will appear in the window. On the Metadata Browser, you can do the following:
 - Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you are interested in LPR metadata, click on the + sign next to LPR and the following expandable list will appear:

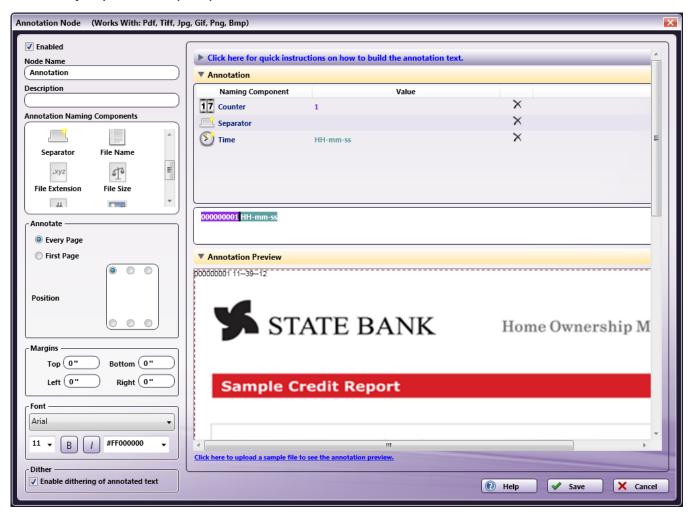


- \circ $\ensuremath{\textit{\textbf{Collapse}}}$ the $\emph{\textbf{list}}$ by clicking on the sign next to the appropriate metadata.
- Choose metadata to add to the annotation by clicking on the metadata and clicking on the Select button. At this point, the Metadata Browser will close and you will return to the Annotate window.
- **Specify a page-level and/or occurrence number** for the metadata reference by clicking on the Custom check box, dragging-dropping the metadata in the empty field provided, and entering the correct syntax.
- Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.
- Date Include the process date. (Double-click to choose the date format).
- Separator A drop-down list of separators available.
- **Time** Include the time within the annotation.
- Counter Add a sequential counter, with Start and Increment values. You can also specify a maximum value in the Max Value field and whether or not to include leading zeros (by checking the Leading Zeros box). The maximum number of digits for a numeric counter is 18.
 In order to maintain count integrity, the counter will no longer be editable once the workflow has run for the first time.

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- File Name Include the original file name in the annotation.
- File Extension Include the original file extension in the annotation.
- File Size Includes the file size in the annotation.
- Page Number, Image Width, Image Height Includes these details about the file. Width and Height are displayed in pixels.

*Text will only wrap if there are spaces present in the annotation.



- Drag elements to the Annotation area and reorder to create annotation text.
- In the Annotate area, select from the following options:
 - **Every page** Puts the annotation on every page.
 - $\circ~$ First Page If a file includes multiple pages, annotates the first page only.
 - Position Mark a button to identify the location where the annotation text is to be added.
- In the Margins area, enter new values for the default printer margins displayed in the Preview area using the **Top, Bottom, Left,** and **Right** fields. Margins are provided for reference, and also are useful when determining the layout of your annotation. The unit of measurement for margins is inches. If you make changes on any of these fields, the margins are immediately adjusted on the Annotation Preview area.
- In the Font area, specify the font, size, style, and color of the annotated text.
- Check the **Dither** box to improve clarity when text is opaque or colored on a black & white image.
- To delete already defined naming components, click on the **Delete** icon (**X**) next to the component you would like to remove.
- To view the results of the annotation process on a sample file, select the **Click here to upload a sample file to see the annotation preview** link on the bottom of the Preview area.

Note: PDF files cannot be used as sample documents.

Dispatcher Phoenix will read the resolution of your sample image and scale the annotation font size accordingly. If the resolution cannot be read, a resolution of 96 dpi is assumed for the sample displayed. Additionally, the original color palette and image format will be maintained. This is especially important to note when black and white or grayscale images are used. If the applied annotation contains colored text on a black and white

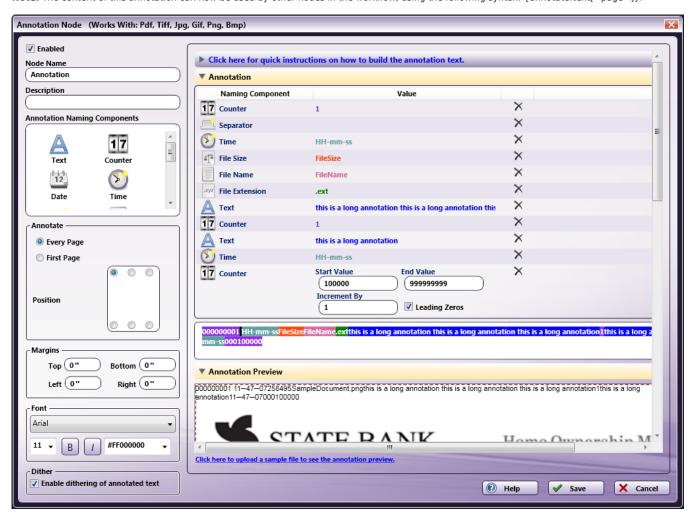
Konica Minolta 396 / 1597

document, the annotation color will be converted to black and white. The shade of the color used can have an effect on whether or not the annotation can be seen on the processed document as, for example, light colored text would be rendered as white and, thus, not visible on a white page.

Note: Even if you upload a sample document, the display may not match the actual results exactly. For a true result, run the workflow.

- When you have all of the annotation components specified, check the **Resulting Annotation Text** at the bottom of the preview pane to make sure it is what you want.
- Select the **Save** button to keep the Annotation definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Note: The content of this annotation can now be used by other nodes in the workflow, using the following syntax: {annotate:text[<page>]}.



Highlight/Strikeout



The Highlight/Strikeout process is used to either highlight important information or cross-out information (marking it for deletion). On this node, you enter the text to search for and highlight or strikeout and specify where/how often the text should have highlights or strikeouts applied. Multiple search terms can be specified. This process works with TIF/TIFF, PNG, JPG/JPEG, BMP, and PDF files. Note that GIF files can be processed by this node but the accuracy of the output may vary.

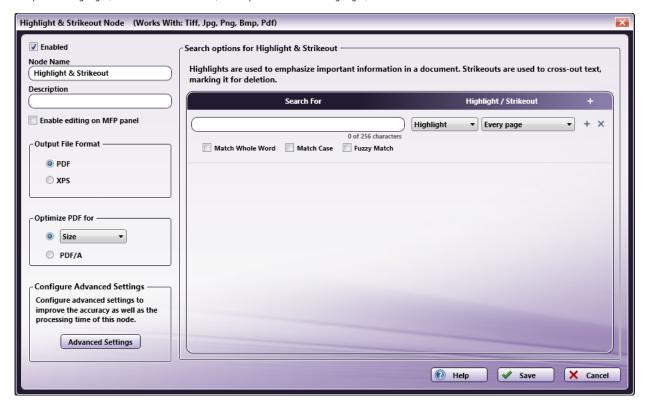
The maximum, allowable size for incoming documents is A0 (33.1" x 46.8"), and the maximum dpi is 2400. Any images exceeding those limits will not be processed. In addition, word processor formats (.doc and .rtf) have a length/height limit of 22".

Note: Some features of this node may not work correctly without Microsoft.NET Framework 3.5. You should install the framework from Windows Update or download it from the Microsoft web site.

Note: This nodes includes the OmniPage OCR engine.

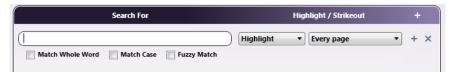
Konica Minolta 397 / 1597

To open the Highlight/Strikeout Node window, add a process node for Highlight/Strikeout and double-click on it.



- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Highlight/Strikeout node.
- In the **Description** field, enter a description for the Highlight/Strikeout node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Check the Enable editing on MFP panel box to allow users to customize the Highlight/Strikeout node at the MFP Panel.
- In the **Output File Format** area, you can choose the format you would like for the output. For more information on which file types are supported, please see the **OCR Settings** page.
- To further define the output file, do one of the following:
 - Optimize for size, quality, or various PDF versions by choosing from the **Optimize PDF For** drop-down list,
 - Optimize for archiving by choosing the PDF/A radio button. This will create a PDF/A compliant output file. PDF/A is the standard for long-term preservation of electronic documents and ensures that files will display identically regardless of the computer environment and remain readable throughout the years.
- Click the Advanced Settings button to adjust the accuracy and speed of the OCR process by configuring OCR settings.
- In the Search options for Highlight & Strikeout area, you can specify the word, text string, or phrase that you want to search for and either highlight or strikeout. Using this area, you can specify as many search text strings, words, or phrases as necessary. In order for this node to be saved, at least one search item must be specified. See the following section for more information.
- Select the **Save** button to keep your Highlight and Strikeout definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Search for Highlight and/or Strikeout



To search for text that needs to have highlights or strikeouts, do the following:

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1. Enter the appropriate text or block of text (up to 256 characters) in the empty field provided under the **Search for** column. You can also cut, copy and paste text into the field using Microsoft shortcut keys (**Ctrl+C**, **Ctrl+X**, **Ctrl+V**) or right-click on the field and choose from the context menu that appears, as in the following illustration:



Note: Text matching will not be performed across multiple lines. If your search phrase contains line breaks, make sure that the Fuzzy Match option is enabled.

2. Once you have specified text to search for, select any other options that you want using the check box(es) below the field:

Option	Description	Example
Match Case	Check this box if capitalization matters during your Search & Highlight/Strikeout. With this option enabled, highlight/strikeout will be applied to word(s) that match the case of the word or phrase that you entered.	If "MR. JONES" is searched for and this option was enabled, "Mr. Jones" will not be highlighted or have strikeouts applied in the processed document.
Match Whole Word	Check this box to search for and highlight/strikeout only complete words, and not words that merely <i>contain</i> what you've specified.	If "boat" is searched for and this option was NOT enabled, the words "boathouse" and "sailboat" would be partially highlighted or have partial strikeouts applied.
Fuzzy Match	Check this box to search for and highlight/strikeout words or text strings that either match or come close to matching what you entered. This option is provided to compensate for any OCR errors.	If "Turtle" is searched for and this option was enabled, the word "Hurtle" would also be highlighted or have strikeout applied to it in the document.

- 3. In the drop-down list next to the Search field, choose whether or not you want to highlight or strikeout the specified text.
- 4. In the next drop-down list, specify where to search and highlight or apply strikeouts. Options include:
 - **Every page** Highlight or strikeout text found on every page.
 - **Every even page** Highlight or strikeout text found on even pages.
 - Every odd page Highlight or strikeout text found on odd pages.
 - First page Highlight or strikeout text found on the first page only.
 - Last page Highlight or strikeout text found on the last page only.
 - **Define your own page range** Define a custom page range for the highlighted or strikeout text. Once you choose this option, an empty field will appear below the drop-down list in which you can enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to highlight text on pages 1, 2, 5, 6, and 7.
 - Specify a specific sequence within a range of pages by using parentheses. For example, enter 1-10(3) to strikeout text on every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to highlight text on pages 15-20 of a 20-page document.
- 5. Enter as many text strings, phrases, or words as you'd like to search for and highlight or strikeout. Click on the + sign to add an empty Search for row to the node. Click on the X sign to delete a Search for row (either empty or filled) from the node. See the following illustration for an example of multiple Search for options:

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Note: This node does not support empty Search for row fields. Once a Search for row has been created (by clicking on the + sign), the field must be filled with text in order for the node to be saved.

Examples of Search and Highlight/Strikeout

• To highlight one word or phrase, enter the text in one Search for row, as in the following illustration:



Original Document

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and a video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

"Well, a busload of *real* strange tourists just arrived across the street, all dressed sort of like you — I don't reckon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet – he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home and get it.

"But don't you dare eat my ice-cream while I'm gone!" he warned before disappearing.

A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we eat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turtle.

But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, "If you touch my ice-cream, I won't even set off!"

Highlighted Output

Konica Minolta 400 / 1597

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and a video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

"Well, a busload of real strange tourists just arrived across the street, all dressed sort of like you — I don't reekon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet – he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home and get it.

"But don't you dare eat my ice-cream while I'm gone!" he warned before disappearing.

A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we eat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turtle.
But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, "If you touch my ice-cream, I won't even set off!"

• To highlight **multiple words**, use separate Search for rows for each word. For example, to highlight the words "Father" and "Turtle," enter those words in two different rows, as in the following example:



Original Document

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and a video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

"Well, a busload of real strange tourists just arrived across the street, all dressed sort of like you — I don't reckon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet - he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home and get it.

"But don't you dare eat my ice-cream while I'm gone!" he warned before disappearing.

A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we eat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turtle. But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, "If you touch my ice-cream, I won't even set off!"

Highlighted Output

Konica Minolta 401 / 1597

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

'Well, a busload of real strange tourists just arrived across the street, all crossed sort of like you — I don't reckon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet – he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home and get it.

"But don't you dare eat my ice-cream while I'm gene!" he warned before disappearing.

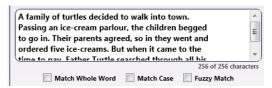
A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we cat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turde.
But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, "If you touch my ice-cream, I won't even set of?!"

• To **strikeout a block of text**, copy and paste the text into the Search for field (using the context menu that appears when you right-click on the field). Any time that block is found in the document, a strikeout is applied.



Original Document

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and a video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

"Well, a busload of *real* strange tourists just arrived across the street, all dressed sort of like you — I don't reckon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet - he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home

"But don't you dare eat my ice-cream while I'm gone!" he warned before disappearing.

A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we eat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turtle. But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, "If you touch my ice-cream, I won't even set off!"

Strikeout Output

Konica Minolta 402 / 1597

A STRAIGHT ANSWER

A tour bus arrived at a small sleepy town in the Midwest. The guide announced a five minute stop and the tourists poured out onto the street. One, with a particularly loud multi-colour shirt and a fifteen gallon hat, festooned with cameras and a video-recorder, wandered across the street. He met a local, smoking his pipe, resting in a hammock.

"Say, fella!" began the tourist, "What's the most interesting or unusual sight to be seen in this town?"

The old man puffed on his pipe philosophically and chewed the question over carefully before answering:

"Well, a busload of real strange tourists just arrived across the street, all dressed sort of like you — I don't reckon I've seen anything so unusual in this town in years!"

TURTLE TROUBLE

A family of turtles decided to walk into town. Passing an ice-cream parlour, the children begged to go in. Their parents agreed, so in they went and ordered five ice-creams. But when it came to the time to pay, Father Turtle searched through all his pockets, under his shell, everywhere. But he

couldn't find his wallet – he'd left it at home. They held a family conference and decided that the youngest (a mere thirty-year-old) should run home and get it.

"But don't you dare eat my ice-cream while I'm gone!" he warned before disappearing.

A week passed. Mother Turtle began to worry, "Oh, dear, what could have happened to Hurtle? It takes only two days to get home, two days to get back, and one to find the wallet. That's five. But he's been gone a week! What shall we do?"

They decided to wait, but the other children were eyeing Hurtle's ice-cream with growing desire. Another week passed. Father Turtle began to worry, "I wonder if a wild animal has caught him, or he's been run over by a steam-roller!". The children sat licking their lips gazing hypnotically and longingly at the uneaten ice-cream.

After three weeks they decided to give up waiting and form a search party. "Then can we eat his ice-cream?" chorused the other two children.

"Yes, all right!" said Mother Turtle. But then just as they started digging into the ice-cream, out popped Hurtle's head from behind a curtain and he screamed, ''If you touch my ice-cream, I won't even set off!"

 To strikeout all words that contain either a certain text string or something similar to it, use the Fuzzy Match option, as in the following illustration:



Original Document

Capitals C, G, Q and O: Queen Charlotte of Germany Often Charms Grecian Generals (normal). Queues for Greyhound Coach to Gotham City Questionea. (italic).

ANCONCAGUA CONQUERED BY TRAGIC GROUP OF GALLANT CLIMBERS COURAGEOUSLY CLINGING TO OUTER EDGE OF CRAGGY CLIFF FACE.

Strikeout Output

Capitals C, G, Q and 0: Queen Charlotte of Germany Often Charms Greeian Generals. (normal). Queens for Greyhound Ceach to Gotham City Questioned. italic).

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Highlight/Strikeout At The Panel

Dispatcher Phoenix users will now be able to edit the configuration of a Highlight/Strikeout node in a workflow directly from the MFP control panel. Any changes made to an existing Highlight/Strikeout node at the panel will be automatically reflected in Dispatcher Phoenix as well.

Note: The Highlight/Strikeout feature is not available on MFPs with Native User Interfaces.

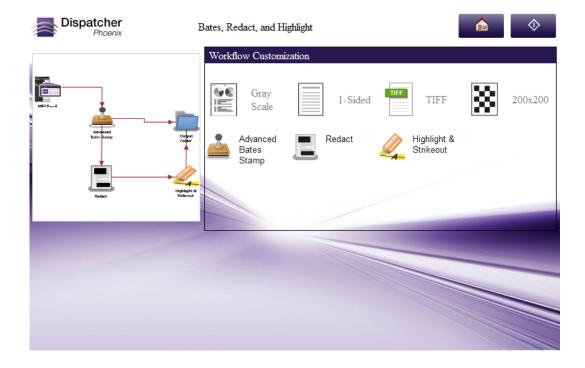
Getting Started

To modify your highlight/strikeout configuration at the device panel, do the following:

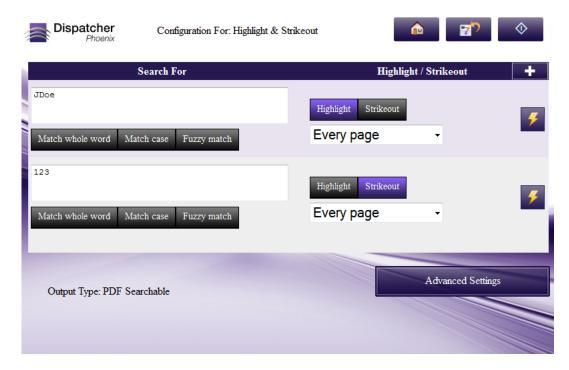
- 1. Configure your workflow to include a MFP Panel node and at least one Highlight/Strikeout node.
- 2. Make sure that your workflow is running.

When you log into Dispatcher Phoenix and access the running workflow at the panel, you will see the Workflow Details screen, as in the following illustration:

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To view or edit your Highlight/Strikeout node, tap on the icon of the Highlight/Strikeout node that you are interested in. The Node Configuration screen will appear, as in the following illustration:



This screen displays the search text strings that have already been defined for the Highlight/Strikeout node. Two search strings are displayed at a time. Up and down arrows are provided to navigate to additional search strings.

On this screen, you can do the following:

- Edit search text listed in the **Search For** fields.
- Specify whether or not to highlight or strikeout the specified search strings when they are found by tapping on the **Highlight** or **Strikeout** buttons.
- Modify highlight/strikeout options for each search string using the **Highlight/Strikeout** drop-down list. The options are the same as those found in the Highlight/Strikeout Node Properties window in Dispatcher Phoenix.

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- Tap on the Match whole word, Match case, and Fuzzy match buttons to enable these settings for each search string.
- Perform other actions on each search string by tapping on its **Action** icon.
- Tap the + button to add another search string to the Highlight/Strikeout node.

Using the Action Tool Bar

When you click on the **Action** icon, an Action tool bar for the specific search string will appear.



The Action Tool Bar provides the following functionality, from left to right:

- · Close tool bar
- · Move search string to top
- · Move search string up one
- Move search string down one
- Move search string to bottom
- · Delete search string

Specifying Advanced OCR Settings

To improve the accuracy of the redaction process as well as its performance time, you may choose to change the default settings of the OCR engine by selecting the **Advanced Settings** button to access the Advanced Settings screen.

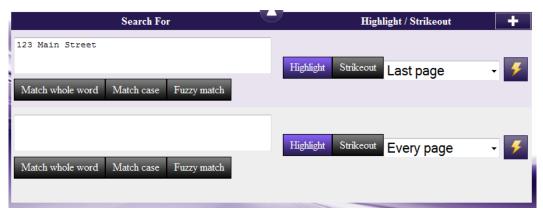
You can specify settings for:

- · Preprocessing
- · OCR recognition
- Output format

The settings available on the MFP panel are similar to the Advanced OCR Settings available from the Highlight/Strikeout node in Dispatcher Phoenix.

Adding a New Search String

To add a new search string to the Highlight/Strikeout node, tap on the + button. An empty input field will appear at the bottom of the list, as in the following illustration:



Do the following:

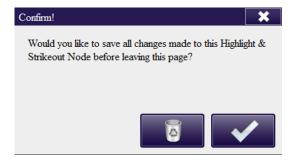
- Enter your search string in the **empty text field** that is provided.
- Tap either the Highlight or Strikeout button to specify whether to highlight or strikeout the search string once it is found.
- · Specify where to highlight or strikeout the search string using the Highlight/Strikeout drop-down list.
- Tap the Match whole word, Match case, and/or Fuzzy match buttons to narrow the search.

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• Use the **Action** bar to move or remove the new search string.

Saving Your Changes

When you are finished with your changes, tap on the Save icon. The following confirmation message will appear:



Redact



The Redact process is used to black out sensitive information on documents. On this node, you enter one or more search items to search for and redact, choose the format of the output file, and specify where/how often the text should be redacted.

The maximum, allowable size for incoming documents is A0 (33.1" x 46.8"), and the maximum dpi is 2400. Any images exceeding those limits will not be processed. In addition, word processor formats (.doc and .rtf) have a length/height limit of 22".

Important! Some features of this node may not work correctly without Microsoft.NET Framework 3.5. You should install the framework from Windows Update or download it from the Microsoft web site.

Note: This nodes includes the OmniPage OCR engine.

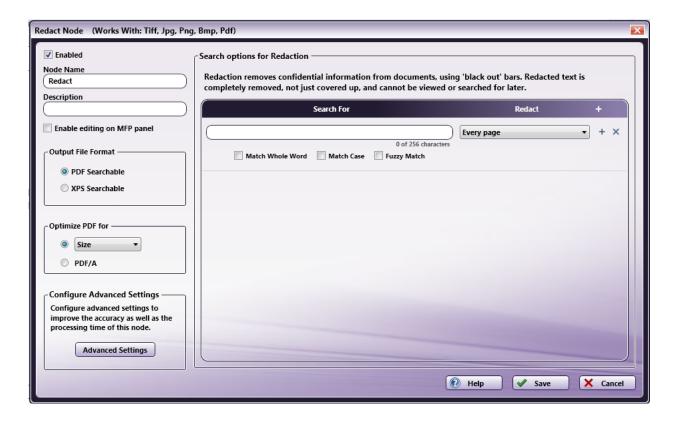
This node works on:

- Single- and multi-page documents, and
- TIF/TIFF, PNG, JPG/JPEG, BMP, and PDF file types.
- GIF files CAN be processed by this node but the accuracy of output may vary.

Best scan resolution: For most documents, 300 dpi is the best resolution; however, you should test your source documents first to confirm that redaction is working correctly.

To open the Redact Node window, add a process node for Redact and double-click on it.

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- Check the Enabled box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through
 as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Redact node.
- In the **Description** field, enter a description for the Redact node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Check the Enable editing on MFP panel box to allow users to customize this Redact node at the MFP Panel.
- In the **Output File Format** area, you can choose the format you would like for the output. For more information on which file types are supported, please see the **OCR Settings** page.
- To further define the output file, do one of the following:
 - Optimize for size, quality, or various PDF versions by choosing from the **Optimize PDF For** drop-down list, or
 - Optimize for archiving by choosing the PDF/A radio button. This will create a PDF/A compliant output file. PDF/A is the standard for long-term preservation of electronic documents and ensures that files will display identically regardless of the computer environment and remain readable throughout the years.
- Click the Advanced Settings button to adjust the accuracy and speed of the OCR process by configuring OCR settings.
- In the **Search options for Redaction** area, you can specify the word, text string, or phrase that you want to search for and redact. Using this area, you can specify as many text strings, words, or phrases as necessary. In order for this node to be saved, at least one search item must be specified. See the following section for more information.
- Select the **Save** button to keep your Redact definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Search For Redaction

To search for text that needs to be redacted, do the following:

1. Enter the appropriate text or copied block of text (up to 256 characters) in the empty field provided under the **Search for** column. The character count will appear below the field. You can also cut, copy and paste text into the field using Microsoft shortcut keys (**Ctrl+C**, **Ctrl+X**, **Ctrl+V**) or right-click on the field and choose from the context menu that appears, as in the following illustration:

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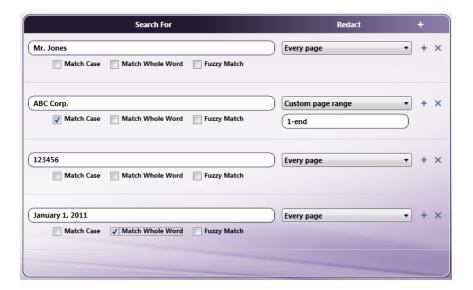
Note: Text matching will not be performed across multiple lines. If your search phrase contains line breaks, make sure that the Fuzzy Match option is enabled.

2. Once you have specified text to search for, select any other options that you want using the check box(es) below the field:

Option	Description	Example
Match Case	Check this box if capitalization matters during your Search & Redact. With this option enabled, redacted words will match the case of the word or phrase that you entered.	If "MR. JONES" is searched for and this option was enabled, "Mr. Jones" will not be redacted in the processed document.
Match Whole Word	Check this box to search for and redact only complete words, and not words that merely <i>contain</i> what you've specified.	If "boat" is searched for and this option was NOT enabled, the words "boathouse" and "sailboat" would be partially redacted.
Fuzzy Match	Check this box to search for and redact words or text strings that either match or come close to matching what you entered. This option is provided to compensate for any OCR errors.	If "Turtle" is searched for and this option was enabled, the word "Hurtle" would also be redacted in the document.

- 1. For each text string, phrase, or word that you enter, you can also choose where/how often to redact it from the drop-down list under the Redact column. Options include:
 - Every page Redact text found on every page.
 - Every even page Redact text found on even pages.
 - Every odd page Redact text found on odd pages.
 - First page Redact text found on the first page only.
 - Last page Redact text found on the last page only.
 - **Define your own page range** Define a custom page range for the redaction. Once you choose this option, an empty field will appear below the drop-down list in which you can enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to redact text on pages 1, 2, 5, 6, and 7.
 - Specify a specific sequence within a range of pages by using parentheses. For example, enter 1-10(3) to redact text on every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to redact text on pages 15-20 of a 20-page document.
- 2. Enter as many text strings, phrases, or words as you'd like to search for and redact. Click on the + sign to add an empty Search for row to the node. Click on the X sign to delete a Search for row (either empty or filled) from the node. See the following illustration for an example of multiple Search for options:

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Note: This node does not support empty Search for row fields. Once a Search for row has been created (by clicking on the + sign), the field must be filled with text in order for the node to be saved.

Examples Of Search And Redact

• To redact one word or phrase, enter the text in one Search for row, as in the following illustration:



• To redact **multiple words**, use separate Search for rows for each word. For example, to redact the words "Father" and "Turtle," enter those words in two different rows, as in the following example:



- To redact a **block of text**, copy and paste the text into the Search for field (using the context menu that appears when you right-click on the field). Any time that block is found in the document, it is redacted.
- To redact all words that either contain a certain text string or something similar to it, use the Fuzzy Match option, as in the following illustration:

quee			Every page	• + ×
Match Whole Word	Match Case	V Fuzzy Match		

For example:

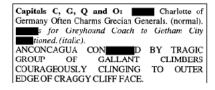
Original Document:

Capitals C, G, Q and O: Queen Charlotte of Germany Often Charms Grecian Generals. (normal). Queues for Greyhound Coach to Gotham City Questioned. (italic).

ANCONCAGUA CONQUERED BY TRAGIC GROUP OF GALLANT CLIMBERS COURAGEOUSLY CLINGING TO OUTER EDGE OF CRAGGY CLIFF FACE.

Redacted Document:

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Redact At Panel

Dispatcher Phoenix users can edit the configuration of a Redact node in a workflow directly from the MFP control panel. Any changes made to an existing Redaction node at the panel will be automatically reflected in Dispatcher Phoenix as well.

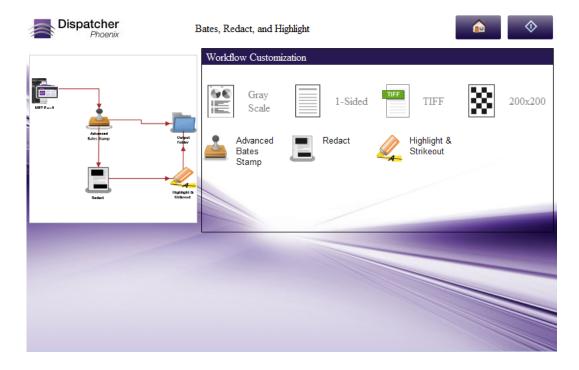
Note: The Redact feature is not available on MFPs with Native User Interfaces.

Getting Started

To modify your redaction configuration at the device panel, do the following:

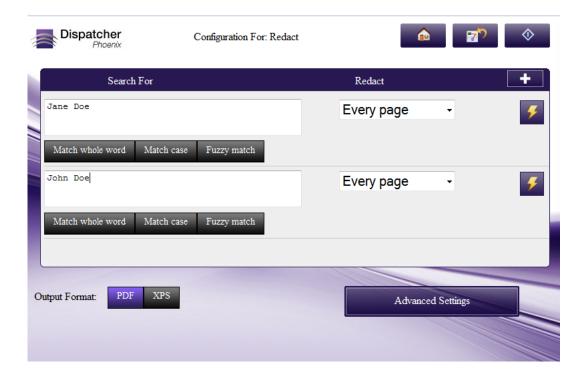
- 1. Configure your workflow to include a MFP Panel node and at least one Redact node. Make sure that the Redact node has the **Enable editing on MFP panel** option enabled.
- 2. Make sure that your workflow is running.

When you log into Dispatcher Phoenix and access the running workflow at the panel, you will see the Workflow Details screen, as in the following illustration:



To view or edit your Redaction node, tap on the icon of the Redaction node that you are interested in. The Node Configuration screen will appear, as in the following illustration:

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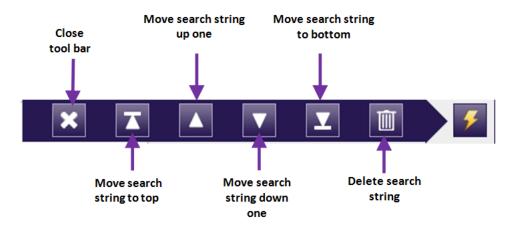
This screen displays the search text strings that have already been defined for the Redaction node. Two search strings are displayed at a time. Up and down arrows are provided to navigate to additional search strings.

On this screen, you can do the following:

- Edit search text listed in the **Search For** fields.
- Modify redact options for each search string using the **Redact** drop-down list. The options are the same as those found in the Redact Node Properties window in Dispatcher Phoenix.
- Tap on the Match whole word, Match case, and Fuzzy match buttons to enable these settings for each search string.
- Change the output format of the redacted file using the **Output Format** buttons (PDF or XPS).
- Perform other actions on each search string by tapping on its **Action** icon.
- Tap the + button to add another search string to the Redact node.
- Set Advanced Settings for the OCR process by tapping on the **Advanced Settings** button.

Using The Action Tool Bar

When you click on the Action icon, an Action tool bar for the specific search string will appear. The Action Tool Bar provides the following functionality:



Specifying Advanced OCR Settings

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To improve the accuracy of the redaction process as well as its performance time, you may choose to change the default settings of the OCR engine by selecting the **Advanced Settings** button to access the Advanced Settings screen.

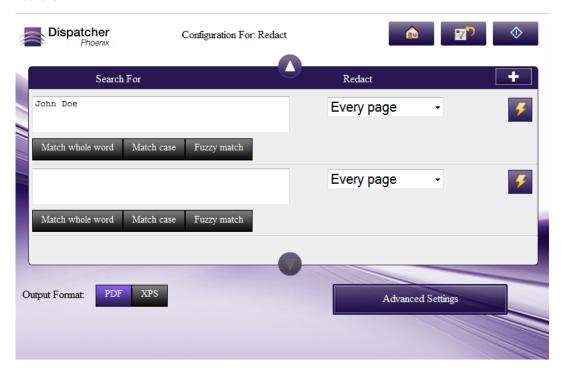
You can specify settings for:

- Preprocessing
- · OCR recognition
- · Output format

The settings available on the MFP panel are similar to the Advanced OCR Settings available from the Redact node in Dispatcher Phoenix.

Adding A New Search String

To add a new search string to the Redaction node, tap on the + button. An empty input field will appear at the bottom of the list, as in the following illustration:



Do the following:

- Enter your search string in the "New Rule" text field.
- Specify redaction options using the **Redact** drop-down list.
- Tap the Match whole word, Match case, and/or Fuzzy match buttons to narrow the search.
- Use the **Action** bar to move or remove the new search string.

Saving Your Changes

When you are finished with your changes, tap on the Workflow Details icon. The following confirmation message will appear:



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DSP

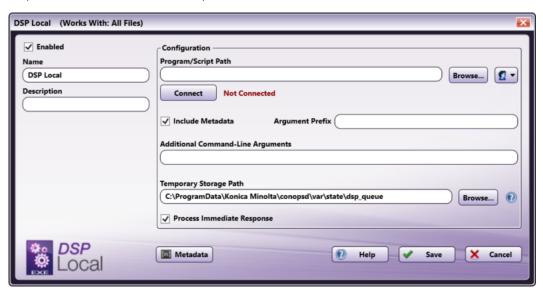
DSP Local



The DSP Local node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Local Node

To open the DSP Local node window, add a process node for DSP Local node and double-click on it.



There are several buttons and fields that appear, including:

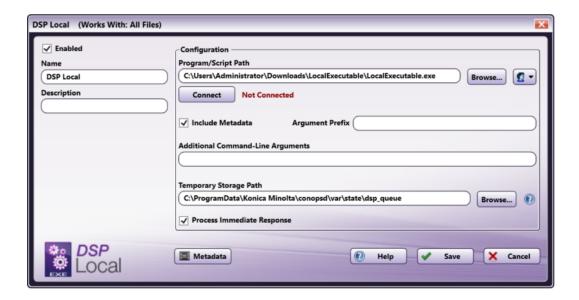
- Enabled Check this box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Files will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- Node Name Enter a meaningful name for the DSP Local node.
- **Description** Enter a description for the DSP Local node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

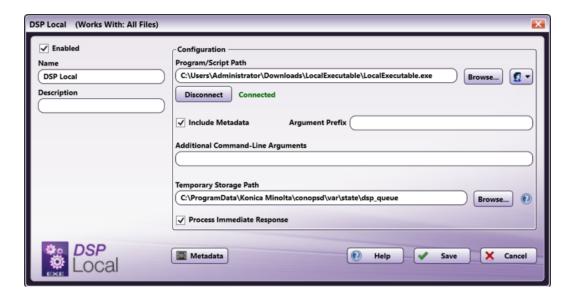
To use this with a DSP-developed local executable, you must configure the node to point to the executable's location (e.g., an accessible folder). After the desired application is saved in the accessible folder, you can direct the DSP Local node to use it. To configure the node, do the following:

- 1. Double-click the DSP Local node to open it.
- 2. Enter the file path to the application. You can also use the **Browse** button to open a folder browser to find the application.

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- The **Authorization** button allows you to enter or edit network credentials, if they are necessary to access the folder the application resides in.
- 3. Select the **Connect** button. This will establish a connection between the DSP Local node and the application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

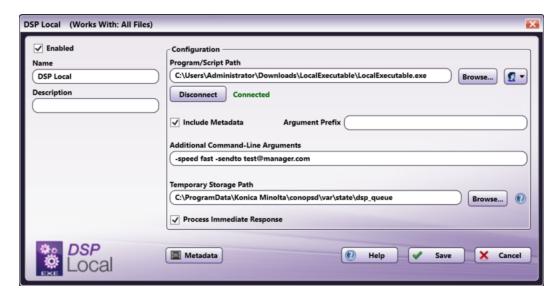


Important! If you have not successfully connected, the workflow cannot be properly validated.

Note: Any changes made to the Program/Script Path or Network Credentials will require you to select the **Connect** button to reestablish the connection.

- 4. Select whether you would like to **Include Metadata** when the document is distributed to the local executable. When this checkbox is selected, the node includes all metadata gathered from previous nodes in the workflow. If the box is checked, enter the necessary **Argument Prefix** in the field provided. These are added to the metadata to help the application distinguish metadata from other data.
- 5. Enter any **Additional Command-Line Arguments** in the field provided. Command-Line Arguments are additional coding commands outside the application, which can alter how the application performs. Any necessary command-line prompts will likely be provided along with the application; otherwise, this field can be left blank. This field is metadata compatible, meaning that you can use the **Metadata** button to drag and drop metadata gathered earlier in the workflow into this field.

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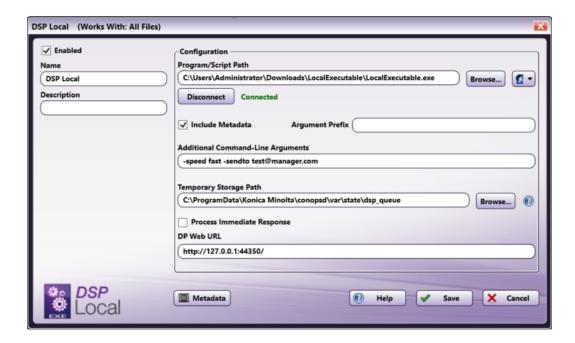


Notes:

- When entering a singular argument that includes multiple words, you will need to enter the phrase within quotation marks. For example, if a
 connected program expects a folder path name and the name includes spaces, the argument would look like: "C:\Program Files\Konica
 Minolta".
- The DPS Local node can process two types of double-quoted arguments:
 - Double quote (each with a backslash) in a double-quoted argument (i.e. "A \"quote\" within a quote.")
 - Single quote in a double-quoted argument (i.e. "A 'quote' within a quote.")
- When entering an argument that includes a single quotation mark ("), a single quote/apostrophe ('), or a backslash (\), you will need to enter a backslash (\) before each symbol in order to properly process the argument. For example, if the application were trying to send the name 0'Brien, you would need to enter the argument as 0\'Brien to include the single quotation mark.
- 6. If needed, edit the file path where you would like to keep temporary files. This is a temporary location used to store documents for processing by the designated application. You can change the default location as long as it is a shared folder or common folder path that can be accessed by all users. You can also use the **Browse** button to open a folder browser to select an appropriate location to store temporary files.
- 7. For **Process Immediate Response**, leave this box checked. This configuration configures the **DSP Local** node to send out a document to be processed by the local executable and to expect a document back almost immediately. By unchecking the box, the node will no longer expect a document to be returned immediately, but will wait for a message from Dispatcher Phoenix Web that the file ready to continue through the workflow. If you uncheck the box, you must enter your Dispatcher Phoenix Web URL to ensure communication between the node and the executable.

Note: If the Dispatcher Phoenix installation and local executable are hosted on devices with different IP addresses, you must configure the DSP Local node with the full explicit DP Web URL in order for the third party application to reach your DP Web.

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8. Save and close the node.

Notes:

- The DSP Local node will process documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.
- The DSP Local node has a maximum file size of 4 MB on most systems. For more information, please contact your Dispatcher Phoenix representative.

DSP Web



The DSP Web node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Web Node

To open the DSP Web node window, add a process node for DSP Web node and double-click on it.

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There are several buttons and fields that appear, including:

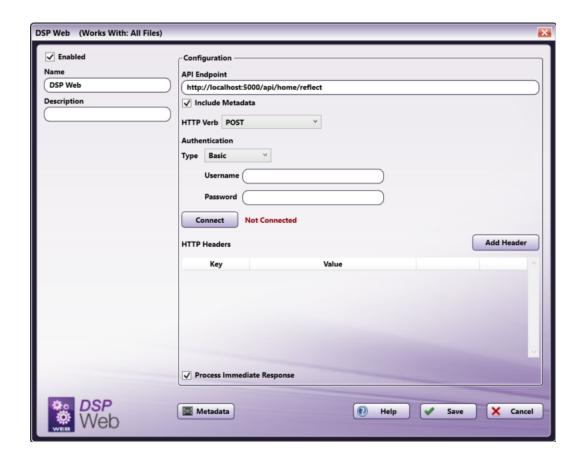
- Enabled Check this box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Files will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- Node Name Enter a meaningful name for the DSP Web node.
- **Description** Enter a description for the DSP Web node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API's location (e.g., a URL). To configure the node, do the following:

- 1. Double-click the DSP Web node to open it.
- 2. Enter the API Endpoint to the application.

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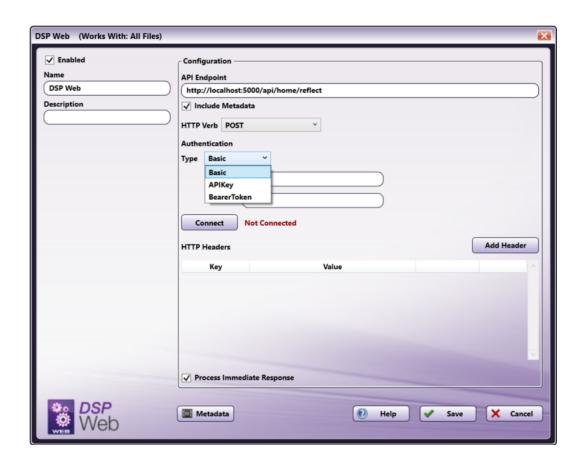
- 3. Select whether you would like to **Include Metadata**. When this checkbox is selected, the node includes all metadata gathered from previous nodes in the workflow.
- 4. Select the **HTTP Verb**. Options include
 - Get
 - Post
 - Put
 - Patch
 - Delete

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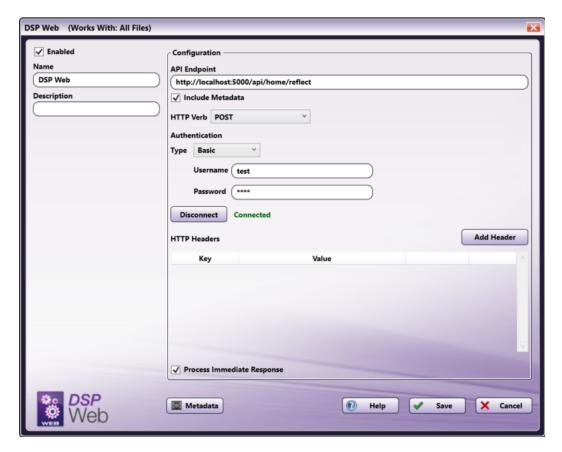
- 5. Select your **Authentication** type. Options include:
 - Basic This will prompt you to enter your **Username** and **Password**.
 - APIKey This will prompt you to enter your **Key Name** and **Key Value**.
 - Bearer Token This will prompt you to enter your **Token**.

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6. Select the **Connect** button. This will establish a connection between the DSP Web node and the web application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

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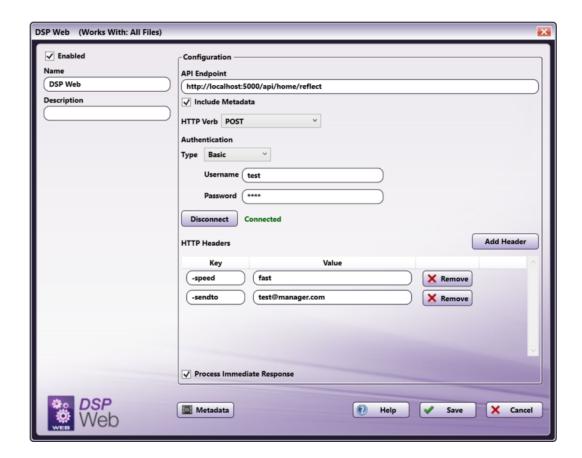


Important! You must select the Connect button in order to properly validate the workflow.

Note: Any changes made to the API field will require you to select the Connect button to reestablish the connection.

7. If needed, add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header. Headers are also metadata compatible. To add metadata to a Header, click the **Metadata** button and drag-drop the metadata key into the Header **Key** or **Value** field.

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8. For **Process Immediate Response**, leave this box checked. This configuration configures the **DSP Web** node to send out a document to be processed by the web API and to expect a document back almost immediately. By unchecking the box, the node will no longer expect a document to be returned immediately, but will wait for a message from Dispatcher Phoenix Web that the file ready to continue through the workflow. If you uncheck the box, you must enter your Dispatcher Phoenix Web URL to ensure communication between the node and the web API.

Note: If the Dispatcher Phoenix installation and web API are hosted on devices with different IP addresses, you must configure the DSP Web node with the full explicit DP Web URL in order for the third party application to reach your DP Web.

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9. Save and close the node.

Note: The DSP Web node will process documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

File Conversion

CDA Generator



The **CDA Generator** enables Dispatcher Phoenix to convert patient records and other clinical documents into standard HL7 CDA XML documents that will then be imported into a medical system such as an Electronic Health Record (EHR) application. The CDA Generator provides healthcare organizations with the interoperability they need to manage their patient records. This node creates an XML template that is ingested by an EHR vendor in order to view the patient's health record.

A CDA-formatted XML file uses a common design structure with the following six characteristics:

- ${\bf 1.} \ {\bf Persistence \ \ Remaining \ in \ use \ for \ a \ long \ period.}$
- 2. Stewardship Maintained by a trusted organization such as a hospital using CDA.
- 3. Potential for authentication Legal verification that the clinical information is accurate.
- 4. Context A default context is added to the record such as patient identity and who created the document.
- 5. Wholeness The full document can be authenticated.

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6. Human Readability - A person can read the material on a browser or mobile device.

Note: The CDA Generator node supports all file types. However, there may be issues when using the CDA Generator node with TIFF (Tag Image File Format) files.

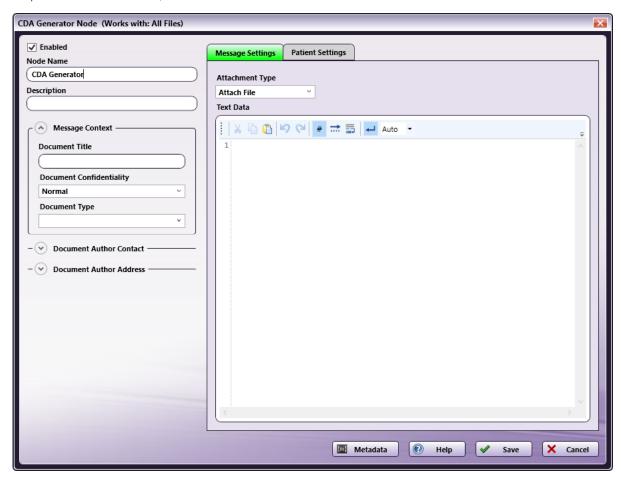
Setting Up the CDA Generator Workflow

Add a MFP Panel node, a CDA Generator node, and your chosen output to your workflow.



Configuring the CDA Generator Node

To open the CDA Generator node, double-click on it.



Do the following:

- 1. Make sure the **Enabled** box is checked. When unchecked, this process will be ignored. While the workflow will still validate, documents will not be processed and may be lost.
- 2. In the Node Name field, enter a meaningful name for the CDA Generator node.
- 3. In the **Description** field, enter a description for the CDA Generator node. This is not required, but it can be helpful when you have more than one processing node. If the description is long, you can hover the mouse over the field to read its entire contents.

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- 4. In the **Message Context** area, configure the following settings:
 - In the **Document Title** field, enter in a meaningful document title.
 - From the **Document Confidentiality** drop-down list, choose whether the document confidentiality level is Low, Moderate, Normal, Restricted, Unrestricted or Very Restricted.
 - From the **Document Type** drop-down list, indicate the document type being processed through the CDA Generator, such as Referral, Discharge, General Communication, Patient Initiated, Emergency Discharge, Inpatient Discharge, or Medication Management.

Note: All fields under **Message Context** accept Metadata. To browse for metadata to add to the fields, click on the **Metadata** button and the **Metadata Browser** window will appear. Using this window, you can drag-and-drop variable names from the **Metadata Browser** to the appropriate open text fields.

- 5. In the **Document Author Contact** section, configure the following information:
 - In the Organization field, enter the organization the document author is associated with.
 - In the First Name field, enter the first name of the document author.
 - In the Last Name field, enter the last name of the document author.
 - In the Phone Number field, enter the phone number for the document author.

Note: All fields under **Document Author Contact** accept Metadata, with the exception of Organization. To browse for metadata to add to the fields, click on the **Metadata** button and the **Metadata Browser** window will appear. Using this window, you can drag-and-drop variable names from the **Metadata Browser** to the appropriate open text fields.

- 6. In the **Document Author Address** section, configure the following fields:
 - In the Address field, enter the street address of the document author.
 - In the City field, enter the city associated with the street address of the document author.
 - In the **State** field, enter the state where the document author is located.
 - In the Zip Code field, enter the zip code of the city and state where the document author is located.
 - In the **Country** field, enter the country the document author resides in.
- 7. In the **Message Settings** tab, configure the following settings:
 - From the **Attachment Type** drop-down list, indicate the type of attachment being processed through the CDA Generator. The options are: No Attachment, Attach File, Attach Text.
 - In the Text Data area, enter the required text, if any, that will need to be included in the patient record. For example, you may include any
 doctor's notes or observations.
- 8. In the **Patient Settings** tab, configure the patient details. The patient details include:
 - Patient ID/MRN.
 - First Name. This field is required.
 - Middle Name.
 - · Last Name. This field is required.
 - Date of Birth (MM/DD/YYYY).
 - Gender.
 - Race.
 - Primary Care Provider.
 - Address.
 - City.
 - State.
 - · Zip Code.
 - · Country.
 - Phone Number.

Note: All fields under **Patient Settings** accept Metadata. To browse for metadata to add to the fields, click on the **Metadata** button and the **Metadata Browser** window will appear. Using this window, you can drag-and-drop variable names from the **Metadata Browser** to the appropriate open text fields.

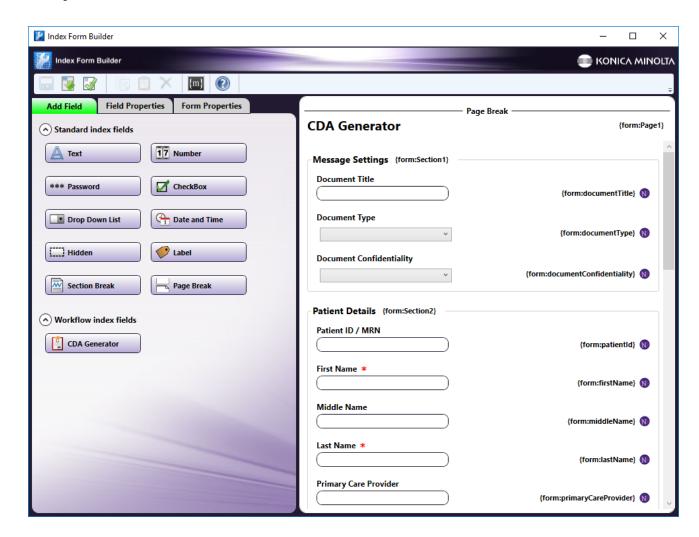
9. Select the **Save** button to keep the CDA Generator configuration. You can also select the **Help** button to access online help or select the **Cancel** button to exit the window without saving any changes.

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Creating a CDA Generator Index Form

You can create an index form that allows you to customize the CDA Generator process at scan time.

- 1. Add a MFP Panel node and CDA Generator node to your workflow.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see a CDA Generator button under the Workflow index fields area.
- 3. Drag and drop the **CDA Generator** button to the Index Form work area. A CDA Generator index form will automatically appear, as in the following illustration:



4. Save and close the Index Form Builder. Once the MFP user specifies patient data with the index form at the MFP, the CDA Generator node will be automatically populated with the index form metadata.

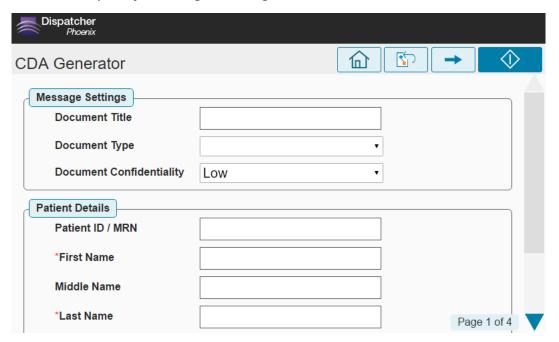
Using the CDA Generator at the MFP

Once an index form has been created and your output node defined, an MFP user can specify document settings at the MFP. See the following illustration for an example:

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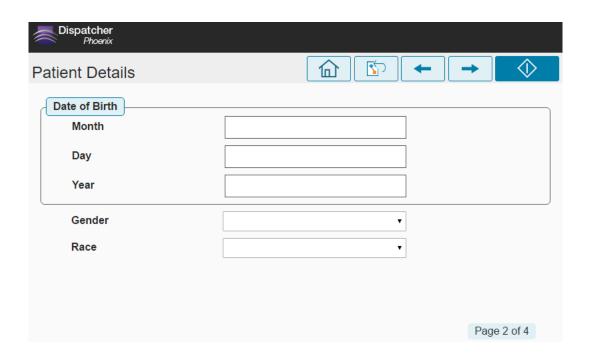


Screen 1: Specify Message Settings and Patient Details

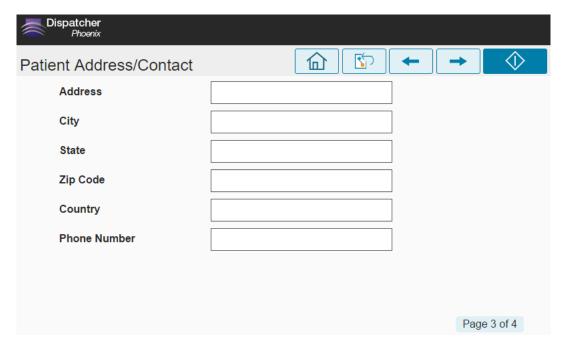


Screen 2: Enter the Patient's Date of Birth, Gender and Race

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Screen 3: Enter the Patient's Address and Other Contact Information



Screen 4: Enter the Document Author's Contact Information

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Dispatcher Phoenix				
Document Author Contact		☆	- (>
First Name				
Last Name				
Phone Number				
			Page 4 of 4	

Convert to Office



The Convert To Office process is an optional node you can use to convert image files and PDFs to standard Microsoft Office formats, such as the following:

- Word
- Excel
- Powerpoint

A scan of 300 DPI or higher is recommended for good output. This process works with the following file types:

- TIF/TIFF
- PNG
- JPG/JPEG
- BMP
- PDF

Note: This node can process GIF files. However, the accuracy of the output may vary.

Important! Some features of this node may not work correctly without Microsoft.NET Framework 3.5. You should install the framework from Windows Update or download it from the Microsoft web site.

Note: This nodes includes the OmniPage OCR engine.

Limits

For incoming documents, any images exceeding the following will not be processed:

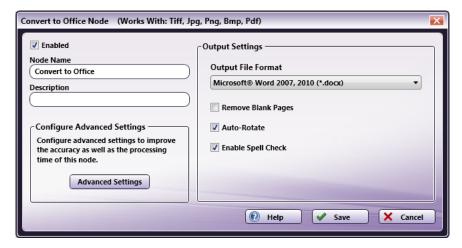
- Maximum allowable size: A0 (33.1" x 46.8")
- Maximum dpi: 2400

In addition, word processor formats (.doc and .rtf) have a length/height limit of 22".

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Configuring the Convert to Office Node

To open the Convert to Office node, drag-drop a **Convert to Office** node from the Distribution panel to the workflow and then double-click on it. The Convert to Office Properties window opens, as shown below:



The following options are available:

- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configure Advanced Settings

To adjust the accuracy and speed of the OCR process, click the **Advanced Settings** button to access the **OCR Settings** screen. For example, if the PDF conversion drastically changes the appearance of the output file, use this screen to adjust the OCR settings accordingly.

Output Settings

Use this section to specify your output settings.

• Output File Format - Choose the output file format. For more information on which file formats and types are supported, please see the OCR Settings page.

Note: For Microsoft Excel, if you process a file with multiple pages, the output will be one workbook file with tabs for each page.

Note: PowerPoint 97 files are outputted as .rtf files but can be opened in PowerPoint once the extension has changed to .ppt.

- Remove Blank Pages To remove any blank pages from the outputted PDF, check this box.
- Auto-Rotate The OCR engine automatically rotates the text appropriately when converting. To prevent any automatic rotation of text, leave
 this box blank.
- Enable Spell Check To achieve better accuracy during the OCR process by determining the acceptability of words and automatically correcting any misspellings, check this box. The default value is enabled. If you do not want incoming files to be automatically spell-checked, uncheck the box. Disabling Spell Check may speed up the OCR Process, but may affect the accuracy of the results.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Convert to PDF

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The Convert to PDF process node converts images and PDFs to different types of PDF documents, including PDF/A-compliant files. Output files can be searchable, editable, and viewable, depending on the settings you define. This node works with the following file types:

- TIF/TIFF
- PNG
- JPG/JPEG
- BMP
- PDF

Notes:

- This node can process GIF files. However, the accuracy of the output may vary.
- The recommended minimum DPI for scanned documents is 200. Better results can be expected for documents 300 DPI and above.
- This node includes the Tesseract OCR engine. You can also purchase a license for the OmniPage OCR engine.

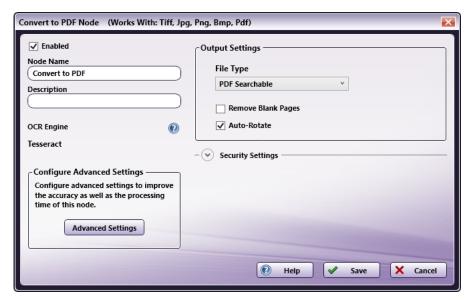
Limits

For incoming documents, any images exceeding the following will not be processed:

- Maximum allowable size: A0 (33.1" x 46.8")
- Maximum dpi: 2400

Configuring the Convert to PDF Node

To open the Convert to PDF node, drag-drop a Convert to PDF node from the Process panel to the workflow and then double-click on it. The Convert to PDF Properties window opens, as shown below:



The above illustration shows the default configuration for the Properties window, with Tesseract as the OCR engine and no selection options available. If you purchase the OmniPage for Convert to PDF add-on node, the OCR Engine field becomes a drop-down field, as in the following illustration:



The following options are available:

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- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- Node Name The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- OCR Engine If multiple OCR engines are licensed and installed in Dispatcher Phoenix, a dropdown menu appears from which you can select the engine you want to use. If only one engine is available on your system, the name of the engine displays at this field.

Note: If you select a different OCR engine, all configuration settings are discarded and set back to the default settings.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Configure Advanced Settings

To adjust the accuracy and speed of the OCR process, click the **Advanced Settings** button to access the **OCR Settings** window. For example, if the PDF conversion drastically changes the appearance of the output file, use this screen to adjust the OCR settings accordingly.

Output Settings

Use this section to specify your output settings.

• **File Type** - Choose the output file type. If you the click on the drop-down, a list of output options appears. The **OCR engine** can affect the list of options available at this field. If an option does not appear at the File Type field, it is not supported by the OCR engine. See the table below.

Output Option	OmniPage	Tesseract
PDF	Υ	N
PDF edited	Υ	N
PDF image only	Υ	Υ
PDF Searchable	Υ	Υ
PDF with image substitutes	Υ	N

Note: To preserve image clarity, including barcodes, select PDF Image Only or PDF Searchable.

- **PDF Version** To further define the output file, click the drop-down and select one of the following. Note that this field is not available for the Tesseract OCR engine.
 - Optimize for Quality
 - Optimize for Size
 - PDF 1.3
 - PDF 1.4
 - PDF 1.5
 - PDF 1.6
 - PDF 1.7
 - PDF/A-1a (will output a PDF version 1.4)
 - $\circ~$ PDF/A-2a (will output a PDF version 1.7)
 - PDF/A-3a (will output a PDF version 1.7)
 - PDF/A-1b (will output a PDF version 1.4)
 - PDF/A-2b (will output a PDF version 1.7)
 - PDF/A-3b (will output a PDF version 1.7)
 - PDF/A-2u (will output a PDF version 1.7)

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• PDF/A-3u (will output a PDF version 1.7)

Note: To preserve image clarity, including barcodes, select Optimize for Quality.

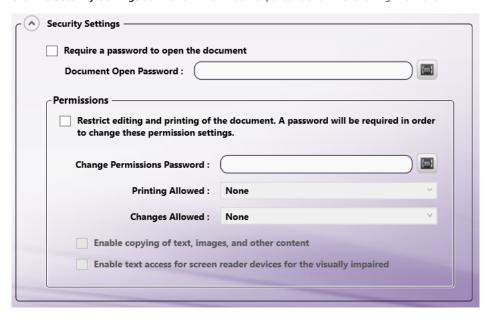
- Remove Blank Pages To remove any blank pages from the outputted PDF, check this box.
- Auto-Rotate The OCR engine automatically rotates the text appropriately when converting. To prevent automatic rotation of the text, leave the box blank

Security Settings

Use this area to specify security settings for your PDF documents (with the exception of PDF/A documents). You can use passwords to restrict users from opening, printing, and editing PDF documents.

Note: Password-protected PDFs cannot be printed from a Dispatcher Phoenix workflow.

Click the **Security Settings** down arrow. The window expands to show the following information:



- Require a password to open the document To require users to enter a password before opening the PDF, check this box.
- Document Open Password In this field, you can do one of the following:
 - Enter the password to be used.

OR

· Select the Metadata icon to open the Metadata Browser and create a password based on metadata in the document.

Permissions

In this area, you can specify which editing and printing options will be available when the PDF document is opened in another application, along with a permissions password that will be required to change these settings.

- Restrict editing and printing of the document To restrict editing and printing of the PDF in other applications, check this box. The fields and boxes in this area activate. This password will be required any time a user tries to change any printing and editing settings that you have set in this node.
- Change Permissions Password In this field you can do one of the following:
 - Enter the password to be used.

OR

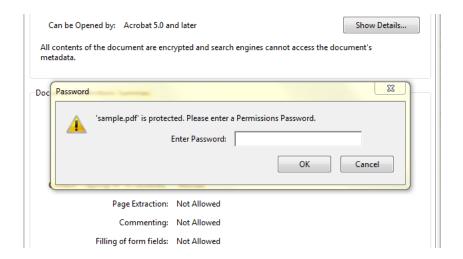
- Select the Metadata icon to open the Metadata Browser and create a password based on metadata in the document.
 - Printing Allowed
 - Low resolution (150 dpi) Allows users to print at no higher than 150 DPI resolution. Printing can be slower because each page is printed as a bitmap image.
 - **High resolution** Allows users to print at any resolution.
 - Changes Allowed

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- Inserting, Deleting, and Rotating Pages Allows users to insert, delete, and rotate pages, as well as create bookmarks and thumbnails.
- Filling In Form Fields and Signing Existing Signature Fields Allows users to fill in forms and add digital signatures. This option does not allow them to add comments or create form fields.
- Commenting, Filling In Form Fields, and Signing Existing Signature Fields Allows users to add comments and digital signatures, and fill in forms. This option does not allow users to move page objects or create form fields.
- Any Except Extracting Pages Allows users to edit the document, create and fill in form fields, and add comments and digital signatures.
- Enable Copying of Text, Images, and Other Content Allows users to select and copy the contents of a PDF.
- Enable Text Access For Screen Reader Devices For The Visually Impaired Allows visually impaired users to read the document with screen readers, but does not allow users to copy or extract the contents.

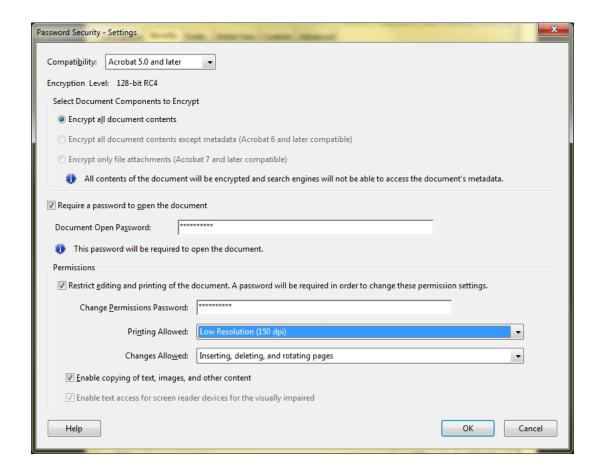
For example, if you specify that no printing is allowed and the permissions password is 'abcdefg,' a user would have to do the following to print that document in Adobe Acrobat:

- 1. Open up the PDF in Adobe Acrobat.
- 2. Choose Properties from the File menu.
- 3. Click on the Securities tab.
- 4. Click on the Change Settings button. A password prompt message box would appear, as follows:



5. Type "abcdefg" in the **Enter Password** field; then click the **OK** button. The following screen would appear:

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6. From the **Printing Allowed** drop-down list, select either **Low Resolution** or **High Resolution**; then select the **OK** button when you are done.

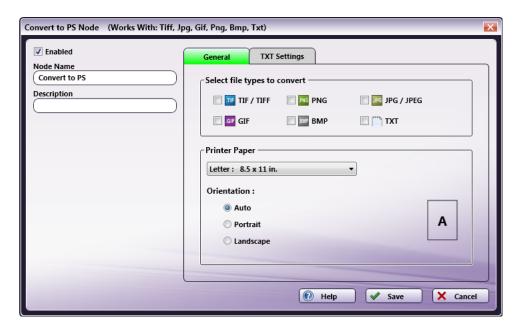
Note: These settings are not editable in Adobe Reader.

Convert to PS



The Convert to PS (PostScript) node enables you to convert images to PostScript format. Supported file types include: TIF/TIFF, PNG, JPG/JPEG, GIF, Text, and BMP. Once you have converted these images to PostScript, you can then either save the PostScript files in an Output folder, or send them to a Printer Distribution Point for printing. To open the Convert To PS Node window, add a process node for Convert to PS and double-click on it.

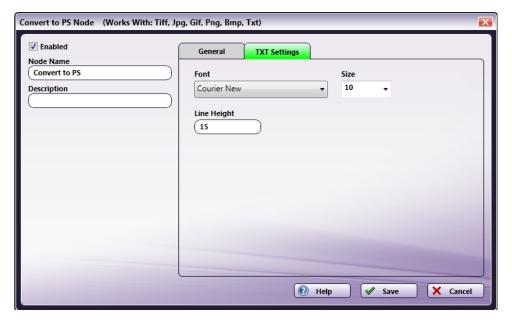
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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Convert To PS node.
- In the **Description** field, enter a description for the Convert To PS node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the Select file types to convert area, mark the image types that you would like to convert.
 - If you need more control over the outputted text when converting TXT files, check the TXT box; then select the TXT Settings tab.
- In the **Printer Paper** area, specify the paper size and orientation (auto, portrait, or landscape). Please note that images will be resized to fit the paper size that you select.
- Select the **Save** button to keep your Convert to PS definition. You can also select the **Help** button to access online help and select the *Cancel* button to exit the window without saving any changes.

TXT Settings

Using this tab, you can customize the font family, font size, and line height of the outputted text file.



Do the following:

• Choose a different font family from the **Font** pull-down list.

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- · Specify a font size using the Size pull-down list.
- Enter a new line height for the text in the Line Height field.

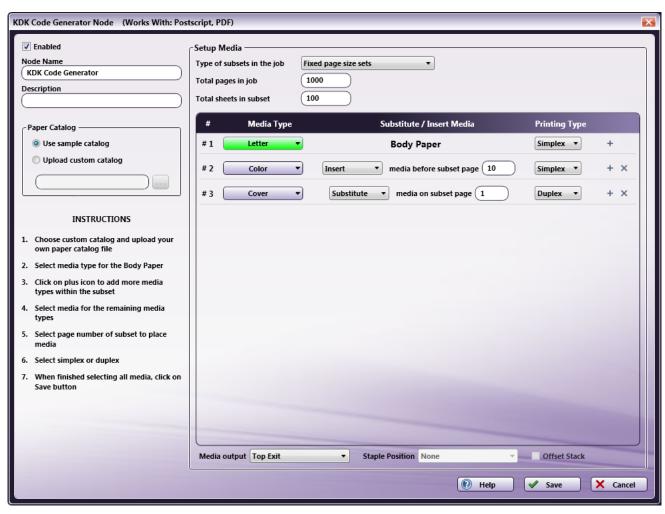
KDK Code Generator



The KDK Code Generator is an optional process that adds KDK/KDE code to incoming PDF or Postscript files to enable printing on a Kodak Digimaster. To customize this node, you must define the structure of the output file and define how the file will be processed on the Digimaster.

Note: After a PDF file is processed by this node, it becomes a PDF file with a Postscript header and will no longer be recognized as a true PDF file. The PDF file's file extension will change from *.pdf to *.ps to signify this change in file type.

To open the KDK Code Generator Node window, add a process node for KDK Code Generator and double-click on it.



- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the KDK Code Generator node.
- In the **Description** field, enter a description for the KDK Code Generator node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Select the **Save** button to keep your KDK Code Generator definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

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Defining Structure Of Output File

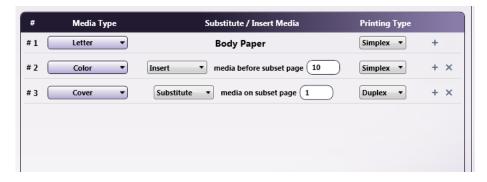
To define the structure of the output, do the following:

- 1. Specify which paper catalog to use by either selecting the **Use sample catalog** radio button to use the basic paper catalog that comes with the node, or selecting **Upload custom catalog** radio button to use another paper catalog from another Digimaster device. If you choose to upload a custom catalog, you must download the paper catalog from your Digimaster first.
- 2. Define the number of subsets that will be in the print file from the **Setup Media** drop-down list. Choices are **Fixed page size sets** and **Tag** delimited sets:
 - If you choose to define the number of pages within each subdocument, you must enter the total pages in the print file and the number of pages in the subdocuments using the **Total pages in job** field and **Total sheets in subset** field. Note that the number of pages for subdocuments must divide into the total page count evenly. For example, defining subdocuments of 100 pages in a document that has a total page count of 1000 is valid; however, a subdocument page count of 90 in a document with a total page count of 1000 would result in 11.11 sets, which is invalid.
 - To specify variable-sized subsets, you can use **Tag delimited sets**, defining each set based on a certain tag found in the file. Click on **Tag delimited sets** from the **Type of subsets in the job** pull-down menu; then enter the appropriate text in the **Tag value** field. This text string or word is case sensitive and regular expressions can be used. If you have specified a media type for a page that does not exist in the set, that media type will not be processed. For example, if the tag delimited set defines a set of 4 pages and a media type is set to occur on page 5, it will not be processed for that set. In addition, if the tag does not occur at the beginning of the document, the pages up to the tag will be routed to the default output of the Digimaster.

Note: When using Tag delimited sets, the input file must be Postscript.

- 3. On the #1 row, choose the primary media type for the body by clicking on the **Select Media** button and choosing a media type from the **Select Media** pop-up window that appears; then choose whether or not Body Paper will be printed simplex or duplex using the **Printing Type** drop-down list. This will be the default for the entire print file.
- 4. After the default is specified, you can define up to 11 additional media types for the file by clicking the + icon at the end of the row. Different media types will either be inserted before or will replace a certain page in a subdocument.

The following illustration is an example of what the node would look like when configured to insert a Color page before page 10 of each subdocument and a Cover page replacing page 1 of each document:



Defining Output Options

After the Media Types have been selected, you can specify the media output/finishing options from the **Media** output drop-down list. Choices are Top Exit, Finisher, Stacker, and Booklet Maker.

- If **Finisher** is selected, the user can customize the position of the staple from the **Staple Position** drop-down list. Choices are: None, Top, Bottom, Both.
- If either Finisher or Stacker is selected, the user can check the Offset Stack box to enable job offset.

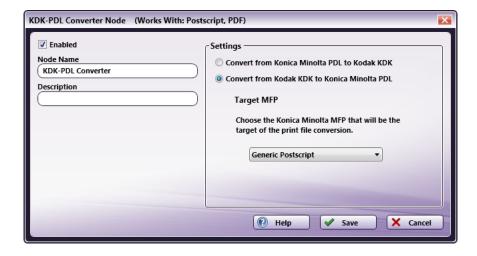
KDK-PDL Converter



The KDK-PDL Converter process is an optional node that converts incoming PDF or Postscript files from Kodak KDK/KDE commands to Konica Minolta Production Print PDL and from Konica Minolta Production Print PDL to Kodak KDK/KDE.

To open the KDK-PDL Converter Node window, add a process node for KDK-PDL Converter and double-click on it.

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- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the KDK Converter node.
- In the **Description** field, enter a description for the KDK Converter node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- To convert to Kodak KDK, select the Convert from Konica Minolta PDL to Kodak KDK radio button.
- To convert to Konica Minolta PDL, select the Convert from Kodak KDK to Konica Minolta PDL radio button. To perform this conversion, you must specify a target MFP to ensure that the correct Konica Minolta PDL is used during the conversion process. Choose the MFP from the Target MFP drop-down list. The default setting is "Generic Postscript," which includes the maximum amount of conversion capabilities.
- Select the **Save** button to keep your KDK Converter definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

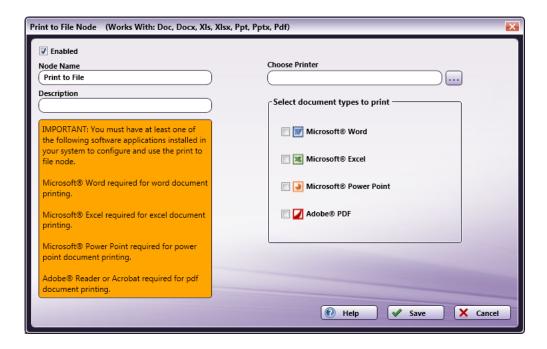
Note: Due to differences between the Kodak Digimaster and Konica Minolta Production Print MFPs, there could be printer commands that are not compatible between the two MFPs. In this case, the best possible alternative command will be used. If there is no alternative, the file(s) will go out on error. For this reason, you should always include an error path with a workflow that contains KDK nodes.

Print To File



The **Print to File** node enables Windows Application Printing, which will load an external application (Adobe Acrobat for PDF files and Office Automation for Microsoft Office documents) and create a PRN file via the associated print driver's default settings. To open the **Print to File Node** window, add a process node for **Print to File** and double-click on it.

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- 1. Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- 2. In the Node Name field, enter a meaningful name for the Print to File node.
- 3. In the **Description** field, enter a description for the Print to File node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. The **Choose Printer** field is not editable. Use the *ellipsis* button (....) to find and select the appropriate printer. Once the ellipsis button is selected, the Select A Printer window will appear, displaying as selectable only those printers that have been configured to print to the Dispatcher Pro Port. Windows Application Printing will generate a print file in the selected print driver's native PDL (PCL, EBCDIC, HP-GL, EPSON, etc.)
- 5. In the **Select document types to print** area, check the boxes for the document types to be converted. Supported file types include: Microsoft Office (Word, Excel, PowerPoint) 2003/2007/2010, Adobe Acrobat 2020/2023, Adobe Reader 2020/2023, and Foxit 12. If one of these programs has been installed but not yet run, Dispatcher Phoenix may report the application as "not installed."

Note: Due to updates in Adobe Reader 2023, you must uncheck the "Enable Protected Mode at startup" option in the Adobe Reader settings (Preferences > Security (Enhanced)) to use it with the Print to File node. Click **here** for more information

6. Select the **Save** button to keep your Print to File definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Note: If the Dispatcher Pro printer device has been removed or renamed, Print to File will not work. In addition, files that are not of a selected type, not supported, or do not convert due to an error are routed in the workflow according to the error condition from the node.

To guarantee output when converting PDF files, *Adobe Acrobat* can only have one instance of itself running at a time; as a result, other nodes may be halted temporarily while the *Print to File* process completes.

Supported Operating Systems

For more information about supported operating systems, see the **Requirements**.

File Parsing

Overview of Parsing

Parsing is a process performed on files based on pre-defined rules. A Parser Rule is a process within a workflow that performs a Search For, Distribute, Insert, or Replace operation, based on the conditions you define. Prior to setting up a Parser process, you need to configure a Parser Rule Node.

For a Rule Node, you can define the following:

- Search words or phrases.
- Search starting and end points (Search From and Search To).

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· Any text to be inserted or replaced at a specified location within the file.

Note: When defining line numbers as your search's starting and end points, be aware that the search will not include the ending line number. For example, if you create a Parse and Insert process that searches for a specific text string from Line Number 4 to Line Number 7, the search results will not include Line Number 7.

You can create multiple Rule Sets to apply to a text file, and each rule may have different words or phrases to be "Searched for" and "Inserted/Replaced," if each *Rule* is met. If you are familiar with printer description languages, such as PostScript and/or PCL, you can even create a rule that will modify the input file, and instruct a Konica Minolta MFP to perform a specific operation on that file.

There are four graphical nodes to represent the different types of Parser Rules:

- Parse Used to create a Search rule only, to be followed by another process.
- Parse & Insert Used to insert a text string after finding the object of a Search.
- Parse & Replace For replacing text found by a Search rule.
- Parse & Distribute Can be used to search for a keyword or text string within a file, not just in the file name, type or size, but to search the content of the file (metadata).

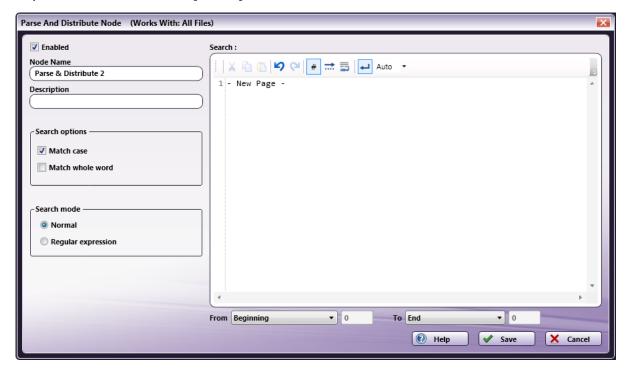
All Previous Occurrences Example

The Parse & Insert, Parse & Replace, and Parse & Distribute nodes offer a "All Previous Occurrences" search option. This ability to perform a secondary search on the results of a previous search is extremely useful and will give you the ability to perform complex operations using substantially shorter rules

In this example, certain occurrences of the word "white" in a text file need to be changed to "blue." Sounds simple? In most cases, you could use the Parse & Replace node to perform this operation (specifying "white" in the Search area and "blue" in the Replace area). However, in this case, the only time "white" needs to be changed is when it is the first occurrence in a subset of the phrase "- New Page - ."

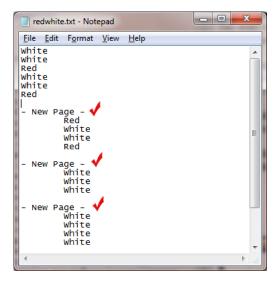
Your workflow would consist of a **Parse & Distribute** node searching for "- New Page - " followed by a **Parse & Replace** node searching for "White" in **all previous search occurrences** up to the first occurrence and replacing "White" with "Blue" in all occurrences.

Step #1: Define a search for "- New Page - " using the Parse & Distribute node, as follows:

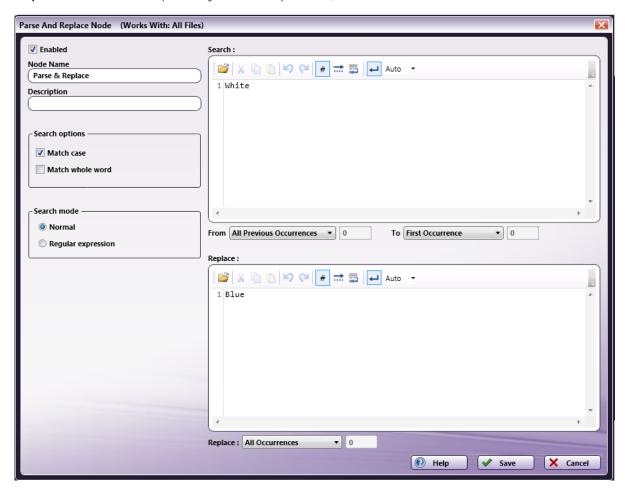


This search looks for each instance of "- New Page -" within the file. In the following illustration, a red check mark identifies the results of that search:

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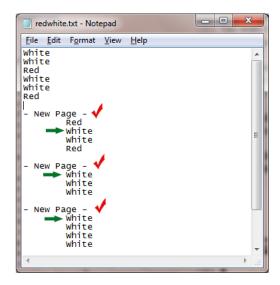


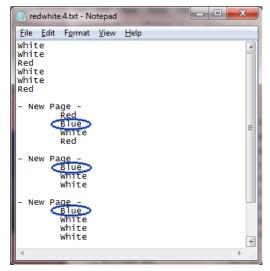
Step #2: Define a search and replace using the Parse & Replace node, as follows:



The Search operation will look through the content of each group that was found in the previous Parse & Distribute search. When the first occurrence of "White" in each group is found, it is replaced with "Blue." In the illustration on the left, a green arrow identifies the results of the search (starting from "All Previous Occurrences" to the "First Occurrence"). In the illustration on the right, the results of the "All Occurrences" replace operation are circled in blue:

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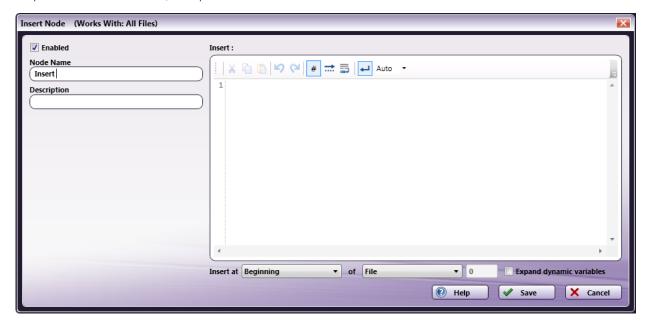


Insert



The **Insert** function is used to insert a text string at the beginning or end of a file or specific line number within the file. This process can be used with any files that have been converted to PS, PCL, or PRN file types. In addition, this process works with text files.

To open the *Insert Node* window, add a process node for *Insert* and double-click on it.

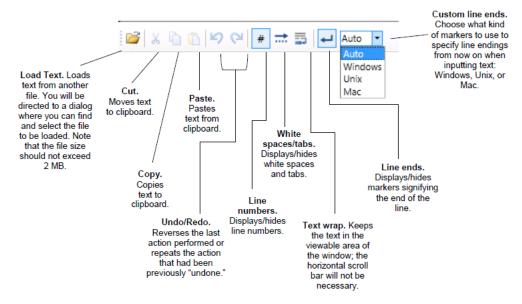


- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the $\bf Node\ Name$ field, enter a meaningful name for the Insert node.
- In the **Description** field, enter a description for the Insert node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the Insert the following box, enter the text string to be inserted.
- In the Insert at fields, specify the following:

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- **Beginning:** This option allows you to insert the text string at the beginning of a file or specific line number. Choose **File** or **Line Number** from the second drop-down list; if choosing Line Number, enter the number in the blank field provided.
- End: This option allows you to insert the text string at the end of a file or specific line number. Choose File or Line Number from the second drop-down list; if choosing Line Number, enter the number in the blank field provided.
- Check the **Expand dynamic variables** box to insert the full value of dynamic variables into the document. For example, to insert the incoming file's file name and extension, you could enter {file:fullname} in the Insert area. If the Expand box is not checked, the variable will not be expanded (i.e., the result would be {file:fullname} instead of postscript1.ps).
- Select the **Save** button to keep your Insert definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Using the tool bar, you can do the following:



Parse & Distribute

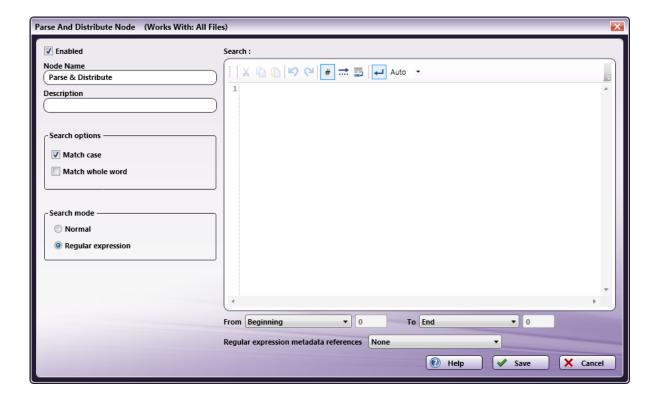


The Parse & Distribute function can be used to search for a keyword or text string within a file. If the text string is found within the file, the document will be routed to the specified destination location (defined by the Yes condition in the workflow). This is similar to other Parse processes, in that it can be Distributed based on Search results, but the Parse rule is limited to searching the file name, type, and size. The Parse & Distribute rule searches from and to a designated point within the file.

Note: This process can be used with any files that have been converted to PS, PCL, or PRN file types. In addition, this process works with text files.

To open the *Parse And Distribute Node* window, add a process node for *Parse & Distribute* and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Parse & Distribute node.
- In the **Description** field, enter a description for the Parse & Distribute node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Search options** area, do the following:
 - Check the **Match case** box to include in the results file names which match the case specified.
 - Check the Match whole word box to include in the results only the whole word specified.
- In the **Search mode** area, specify either:
 - Normal to search the file name for the exact text entered.
 - Regular expression to use regular expressions to search for a pattern, rather than just words or phrases.
- In the **Search for** box, enter the text string or expression that you want to use as your search criteria.
- In the **From/To** fields, specify your search STARTING and END points. Options include:

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From	То
Beginning	End - Search from the beginning of the file to the end of the file being parsed.
	Line Number - Search from the beginning of the file to a specific line number; enter a line number in the blank field provided.
	First Occurrence - Search from the beginning of the file to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from the beginning of the file to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from the beginning of the file to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
Line Number	End - Search from a specific line number (entered in the blank field provided) up to the end of the file being parsed.
	Line Number - Search from a specific line number (entered in the blank field provided) to a specific line number (entered in the blank field provided).
	First Occurrence - Search from a specific line number (entered in the blank field provided) to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from a specific line number (entered in the blank field provided) to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from a specific line number (entered in the blank field provided) to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
All Previous Occurrences*	First Occurrence - Search within all of the matching blocks of content within previous results up to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search within all of the matching blocks of content within previous results up to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search within all of the matching blocks of content within previous results up to a specific occurrence within the results. This field can accept a negative number to search for an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search to the fifth occurrence from the last. It will always return only one match.
	All Occurrences - Search within all of the matching blocks of content within previous results up to all occurrences of a match.
* The All Previous Occurrences option only works if the previous rule was a "Search for" operation and the matching results are your Start point.	

• Select the **Save** button to keep the Parse & Distribute definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Add References as Metadata

When you use regular expressions with subgroups within your search operation, you can create metadata out of the subgroup(s) for use in other parsing nodes in the workflow.

This is useful to capture pieces of data within a file during a search operation and then using that data later in the workflow.

Using the **Regular expression metadata references** drop-down list, which only becomes available when you select the **Regular expression** radio button under **Search** mode, you can specify how metadata is created:

- Choose **None** if you do not want referenced metadata to be available.
- Choose the **Add named references** option to create metadata from subgroups with "friendly names" only.
- Choose the **Add numbered references** option to create metadata from numbered subgroups only.
- Choose the **Add named and numbered references** option to create metadata from both named and numbered subgroups. Note that this option may produce duplicates since named references can also be accessed by numbers.

Examples

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The examples below use the following text file as the file being processed:

%!PS-Adobe-3.0

%%Driver Build: 07.01.00.0010
%%Title: (account_statement.pdf)

%%StartKPDComments

%EK-JSE-3-0-Build: 07.00.00.0000

%KDKBody: (Letter) on
%KDKPrintMethod: print
%KDKOutputMedia: stapler

%%Requirements: numcopies(2) staple(front) fold(none) duplex(on) collate jog(alternate)

%KDKRequirements: numcopies(2) staple(front) fold(none) duplex(longedge) collate jog(alternate) trim(off)

%KDKCovers: (Letter) none

%KDKRotation: 0

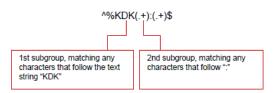
%KDKError: on (Letter)

%KDKPeSubset: 1 6

%KDKPeOutput: stapler 6

Example #1: To use the values found after all occurrences of %KDK in a file, you could do the following:

- 1. On the Parse and Distribute node, click the Regular Expression radio button in the Search Mode area.
- 2. Enter the following regular expression in the Search area:



- 3. Make sure that the Add numbered References option is selected from the Regular expression metadata references drop-down list.
- 4. In a subsequent Insert node, enter: {parse:1} to insert the value that was pulled from the first subgroup specified in the regular expression on the Parse and Distribute node. (Make sure that the **Expand Dynamic Variables** option is enabled on the Insert node window).

Results:

The inserted value would be: Body

(the first occurrence of the 1st reference group)

Example #2: You can also use a friendly name for your subgroup. As another example:

- 1. On the Parse and Distribute node, click the **Regular Expression** radio button in the **Search Mode** area.
- 2. Enter the following regular expressions in the Search area:

^%KDK(.+):(?<Value1>.+)\$

^%KDK(.+):(?<Value2>.+)\$

^%KDK(.+):(?<Value3>.+)\$

where <Value1>, <Value2>, and <Value3> are friendly names for the subgroups. The friendly name must be enclosed in angle brackets "<>"

- 3. Make sure that the Add named and numbered references option is selected from the Regular expression metadata references drop-down list.
- 4. In a subsequent Insert node, enter {parse:Value3} to insert the value of the Value3 subgroup. (Make sure that the **Expand Dynamic Variables** option is enabled on the Insert window).

The inserted value would be: stapler

Example #3: You can also extract results of regular expressions in a separate file using the Metadata File node. For example:

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- 1. On the Parse and Distribute node, click the Regular Expression radio button in the Search Mode area.
- 2. Enter the following regular expression in the Search area:

```
^%KDK(.+):(?<Value>.+)$
```

where <Value> is a friendly name for the subgroup

- 3. Make sure that the Add named and numbered references option is selected from the Regular expression metadata references drop-down list.
- 4. Add a Metadata to File node to your workflow.
- 5. On the Metadata to File node window, choose to extract Parse and Distribute metadata.

A new metadata file will be created, storing all the values found from the regular expression that you specified in the Parse and Distribute node window.

Using the Tool Bar

Using the tool bar, you can do the following:



- Load Text Loads text from another file. You will be directed to a window where you can find and select the file to be loaded. Note that the file size should not exceed 2 MB.
- Cut Moves text to clipboard.
- Copy Copies text to clipboard.
- Paste Pastes text from clipboard.
- Undo Reverses the last action performed.
- Redo Repeats the action that had previously been "undone."
- Line numbers Displays/hides line numbers.
- White spaces/tabs Displays/hides white spaces and tabs.
- Text wrap Keeps the text in the viewable area.
- Line ends Displays/hides markers signifying the end of the line.
- Custom line ends Choose what kind of markers to use to specify line endings from now on when inputting text: Windows, Unix, or Mac.

Parse & Insert

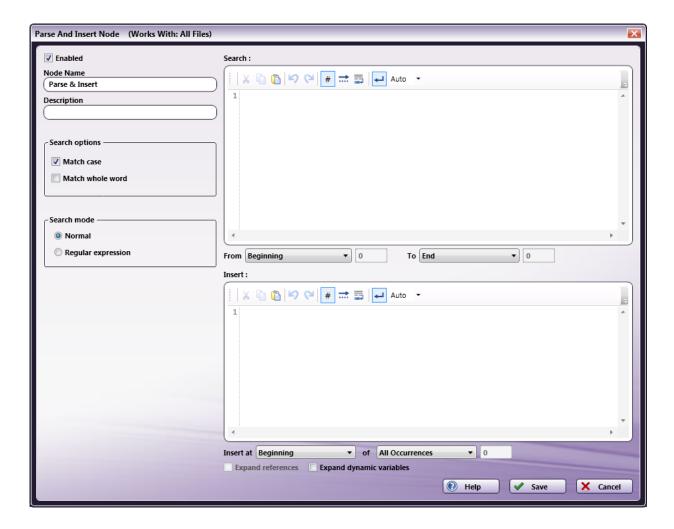


The **Parse & Insert** function is used to *insert* a keyword or phrase into a file after meeting your search criteria. You need to specify the **search** criteria in the upper portion of the window and then use the lower section to define where and when to **insert** the text string.

Note: This process can be used with any files that have been converted to PS, PCL, or PRN file types. In addition, this process works with text files.

To open the Parse And Insert Node window, add a process node for Parse & Insert and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Parse & Insert node.
- In the **Description** field, enter a description for the Parse & Insert node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Search options** area, do the following:
 - Check the **Match case** box to include in the results file names which match the case specified.
 - $\circ~$ Check the Match whole word~ box to include in the results only the whole word specified.
- In the **Search mode** area, specify either:
 - Normal to search the file name for the exact text entered.
 - Regular expression to use regular expressions to search for a pattern, rather than just words or phrases.
- In the **Search for** area, enter the text string or expression that you want to use as your search criteria; then identify where to search. Options include:

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From	То
Beginning	End - Search from the beginning of the file to the end of the file being parsed.
	Line Number - Search from the beginning of the file to a specific line number; enter a line number in the blank field provided.
	First Occurrence - Search from the beginning of the file to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from the beginning of the file to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from the beginning of the file to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
Line Number	End - Search from a specific line number (entered in the blank field provided) up to the end of the file being parsed.
	Line Number - Search from a specific line number (entered in the blank field provided) to a specific line number (entered in the blank field provided).
	First Occurrence - Search from a specific line number (entered in the blank field provided) to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from a specific line number (entered in the blank field provided) to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from a specific line number (entered in the blank field provided) to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
All Previous Occurrences*	First Occurrence - Search within all of the matching blocks of content within previous results up to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search within all of the matching blocks of content within previous results up to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search within all of the matching blocks of content within previous results up to a specific occurrence within the results. This field can accept a negative number to search for an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search to the fifth occurrence from the last. It will always return only one match.
	All Occurrences - Search within all of the matching blocks of content within previous results up to all occurrences of a match.
* The All Previous Occurrences option only works if the previous rule was a "Search for" operation and the matching results are your Start point.	

• In the **Insert with** area, enter the text string or expression that you want to insert; then identify where to insert the text string. Options include:

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Insert at:	of:
Beginning	File - Insert at the beginning of file.
	Line Number - Insert at the beginning of a specific line number in the file.
	All Occurrences - Insert at the beginning of all occurrences of a match.
	First Occurrence - Insert at the beginning of the first occurrence of a match.
	Last Occurrence - Insert at the beginning of the last occurrence of a match.
	Occurrence Number - Insert at the beginning of a specific occurrence within the results. This field can accept a negative number to insert at the beginning of an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will insert at the beginning of the fifth occurrence from the last.
End	File - Insert at the end of file.
	Line Number - Insert at the end of a specific line number in the file.
	All Occurrences - Insert at the end of all occurrences of a match.
	First Occurrence - Insert at the end of the first occurrence of a match.
	Last Occurrence - Insert at the end of the last occurrence of a match.
	Occurrence Number - Insert at the end of a specific occurrence within the results. This field can accept a negative number to specify an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will insert at the end of the fifth occurrence from the last.
Next Line	Line Number - Insert at the next line after a specific line number.
	All Occurrences - Insert at the next line after all occurrences of a match.
	First Occurrence - Insert at the next line after the first occurrence of a match.
	Last Occurrence - Insert at the next line after the last occurrence of a match.
	Occurrence Number - Insert at the next line after a specific occurrence within the results. This field can accept a negative number to insert at an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will insert at the next line after the fifth occurrence from the last.

• Select the **Save** button to keep the Parse & Insert definition, and add a transition to the next node. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Expand References

When you use regular expressions in your search operation, you can insert the value of a specific subgroup by using the **Expand References** checkbox.

To insert values from regular expression subgroups, you can use the following syntax:

(\)

or

g < > (when referencing friendly names or subgroup number)

Examples

The examples below use the following text file as the file being processed:

%KDKBody: (Letter) on

% KDKPrintMethod: print

%KDKOutputMedia: stapler

 $\%\% Requirements: numcopies (2) \ staple (front) \ fold (none) \ duplex (on) \ collate \ jog (alternate)$

 $\% KDKR equirements: numcopies (2) \ staple (front) \ fold (none) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ trim (off) \ duplex (longedge) \ collate \ jog (alternate) \ duplex (longedge) \ duple$

%KDKCovers: (Letter) none

%KDKRotation: 0

%KDKError: on (Letter)

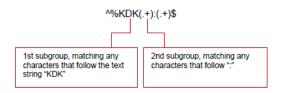
%KDKPeSubset: 1 6

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%KDKPeOutput: stapler 6

Example #1: To insert the value that was found after all occurrences of %KDK but before the colon (:), do the following:

- 1. On the Parse and Insert node, click the Regular Expression radio button in the Search Mode area.
- 2. Enter the following regular expression in the **Search** area:



3. Enter the following in the **Insert** area:

(1)

- 4. Make sure that the **Expand References** box is checked.
- 5. If the Insert at End of All Occurrences option was chosen, the result would be as follows (with the inserted text highlighted in red):

%KDKBody: (Letter) on (Body)

%KDKPrintMethod: print (PrintMethod)

%KDKOutputMedia: stapler (OutputMedia)

%KDKRequirements: numcopies(2) staple(front) fold(none) duplex(longedge) collate jog(alternate) trim(off) (Requirements)

%KDKCovers: (Letter) none (Covers)

%KDKRotation: 0 (Rotation)

%KDKError: on (Letter) (Error)

%KDKPeSubset: 1 6 (PeSubset)

%KDKPeOutput: stapler 6 (PeOutput)

Example #2: You can also use a friendly name for your subgroup. As another example:

- 1. On the Parse and Insert node, click the Regular Expression radio button in the Search Mode area.
- 2. Enter the following regular expression in the **Search** area:

^%KDK(.+):(?<Value1>.+)\$

 $where <\!\! \text{Valuel>} \text{ is the friendly name for the second subgroup. The friendly name must be enclosed in angle brackets "<\!\! \text{ >"}$

3. Enter the following in the **Insert** area:

\g<Value1>

- 4. Make sure that the Expand References box is checked.
- 5. If the **Beginning** of **File** option was chosen, the result would be as follows (with the inserted string highlighted in red):

Body %KDKBody: (Letter) on

%KDKPrintMethod: print

%KDKOutputMedia: stapler

% KDKR equirements: numcopies (2) staple (front) fold (none) duplex (longedge) collate jog (alternate) trim (off) and the property of the pr

%KDKCovers: (Letter) none

%KDKRotation: 0

%KDKError: on (Letter)
%KDKPeSubset: 1 6

%KDKPeOutput: stapler 6

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Expand Dynamic Variables

As well as expanded references, you can also choose to insert expanded dynamic variables during your Parse and Insert operation by checking the **Expand Dynamic Variables** box. You can also specify anything that was previously captured as metadata in the workflow, such as barcodes and OCR zones.

Example: To insert the file name and extension at the end of all occurrences of a particular string, you could add {file:fullname} in the Insert area.

Using the Tool Bar

Using the tool bar, you can do the following:



- Load Text Loads text from another file. You will be directed to a window where you can find and select the file to be loaded. Note that the file size should not exceed 2 MB.
- Cut Moves text to clipboard.
- · Copy Copies text to clipboard.
- Paste Pastes text from clipboard.
- Undo Reverses the last action performed.
- Redo Repeats the action that had previously been "undone."
- Line numbers Displays/hides line numbers.
- White spaces/tabs Displays/hides white spaces and tabs.
- Text wrap Keeps the text in the viewable area.
- Line ends Displays/hides markers signifying the end of the line.
- Custom line ends Choose what kind of markers to use to specify line endings from now on when inputting text: Windows, Unix, or Mac.

Note: After completing the Insert operation, all of the "Search For" results are cleared.

Parse & Replace

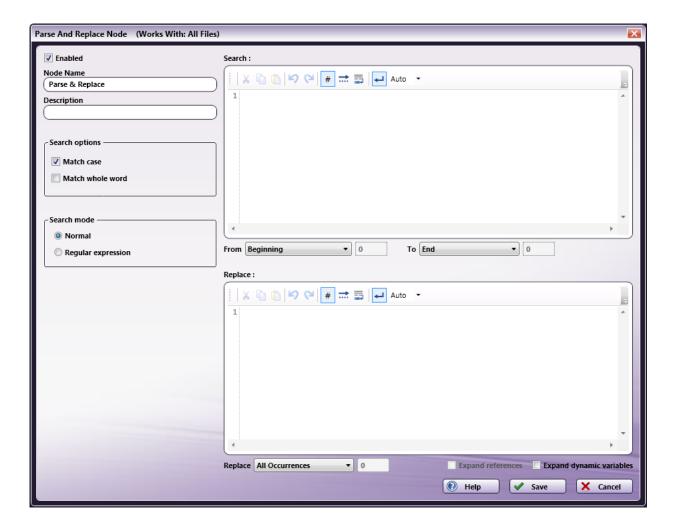


The Parse & Replace function is used to replace a keyword or phrase into a file after meeting your *Search* criteria. You need to specify the search criteria in the upper portion of the window, and then use the lower section to define where and when to *replace* the text string.

Note: This process can be used with any files that have been converted to PS, PCL, or PRN file types. In addition, this process works with text files.

To open the Parse And Replace Node window, add a process node for Parse & Replace and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Parse & Replace node.
- In the **Description** field, enter a description for the Parse & Replace node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Search options** area, do the following:
 - Check the **Match case** box to include in the results file names which match the case specified.
 - $\circ~$ Check the Match whole word~ box to include in the results only the whole word specified.
- In the **Search mode** area, specify either:
 - Normal to search the file name for the exact text entered.
 - Regular expression to use regular expressions to search for a pattern, rather than just words or phrases.
- In the **Search for** area, enter the text string or expression that you want to use as your search criteria; then specify the START and END points for your search in the **From** and **To** fields. Options include:

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From	То
Beginning	End - Search from the beginning of the file to the end of the file being parsed.
	Line Number - Search from the beginning of the file to a specific line number; enter a line number in the blank field provided.
	First Occurrence - Search from the beginning of the file to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from the beginning of the file to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from the beginning of the file to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
Line Number	End - Search from a specific line number (entered in the blank field provided) up to the end of the file being parsed.
	Line Number - Search from a specific line number (entered in the blank field provided) to a specific line number (entered in the blank field provided).
	First Occurrence - Search from a specific line number (entered in the blank field provided) to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search from a specific line number (entered in the blank field provided) to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search from a specific line number (entered in the blank field provided) to a specific occurrence within the results. This field can accept a negative number to search up to an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search up to the fifth occurrence from the last. It will always return only one match.
All Previous Occurrences*	First Occurrence - Search within all of the matching blocks of content within previous results up to the first occurrence of a match. It will always return only one match.
	Last Occurrence - Search within all of the matching blocks of content within previous results up to the last occurrence of a match. It will always return only one match.
	Occurrence Number - Search within all of the matching blocks of content within previous results up to a specific occurrence within the results. This field can accept a negative number to search for an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will search to the fifth occurrence from the last. It will always return only one match.
	All Occurrences - Search within all of the matching blocks of content within previous results up to all occurrences of a match.
* The All Previous Occurrences option only works if the previous rule was a "Search for" operation and the matching results are your Start point.	

- In the **Replace with** area, enter the text string that should replace a keyword or phrase at a position which you specify within a file. Replace options include:
 - All Occurrences: Replace a word or phrase at all occurrences of a match.
 - First Occurrence: Replace a keyword or phrase at the first occurrence of a match in your search results, with a new word or phrase.
 - Last Occurrence: Replace a keyword or phrase at the last occurrence of a match in your search results, with a new keyword or phrase.
 - **Occurrence Number:** Replace a word or phrase at a specified occurrence of a match to your search results, with a new word or phrase. This field can accept a negative number to replace at an occurrence that is a certain number from the last occurrence. For example, if you specify -5 in this field, you will replace the fifth occurrence from the last.
 - Select the **Save** button to keep your Parse & Replace definition, and add transitions to the next step in the workflow. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Expand References

When you use regular expressions in your search operation, you can replace the result of your search with the value of a specific reference group by using the **Expand References** checkbox.

To replace text with values from regular expression reference values, you can use the following syntax:

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```
(\)
```

01

g< > (when referencing friendly names or subgroup numbers)

Examples

The examples below use the following text file as the file being processed:

%KDKBody: (Letter) on

%KDKPrintMethod: print

%KDKOutputMedia: stapler

%%Requirements: numcopies(2) staple(front) fold(none) duplex(on) collate jog(alternate)

%KDKRequirements: numcopies(2) staple(front) fold(none) duplex(longedge) collate jog(alternate) trim(off)

%KDKCovers: (Letter) none

%KDKRotation: 0

%KDKError: on (Letter)
%KDKPeSubset: 1 6

%KDKPeOutput: stapler 6

To replace the "KDK" string with "KM" yet keep all the other values in each command line, do the following:

- 1. On the Parse and Replace node, click the Regular Expression radio button in the Search Mode area.
- 2. Enter the following regular expression in the **Search** area:

^%KDK(.+):(?<Value1>.+)\$

3. Enter the following in the **Replace** area:

 $KM\%\1:\g<Value1>$

- 4. Make sure that the **Expand References** box is checked.
- 5. If the Replace All Occurrences option was chosen, the result would be as follows (with the replaced text highlighted in red):

KM %KDKBody: (Letter) on

KM%PrintMethod: print

KM%OutputMedia: stapler

 $\textbf{KM} \\ \textit{Mequirements: numcopies(2) staple(front) fold(none) duplex(longedge) collate jog(alternate) trim(off) \\ \textit{fold(none) duplex(longedge) collate jog(alternate) trim(off)} \\ \textit{fold(none) dup$

KM%Covers: (Letter) none

KM%Rotation: 0

KM%Error: on (Letter)
KM%PeSubset: 1 6

KM%PeOutput: stapler 6

Expand Dynamic Variables

As well as expanded references, you can also choose to replace text with expanded dynamic variables during your Parse and Replace operation by checking the **Expand Dynamic Variables** box. You can also specify anything that was previously captured as metadata in the workflow, such as barcodes and OCR zones.

Example: To replace text with the file name and extension, you could add {file:fullname} in the Replace area.

Using the Tool Bar

Using the tool bar, you can do the following:

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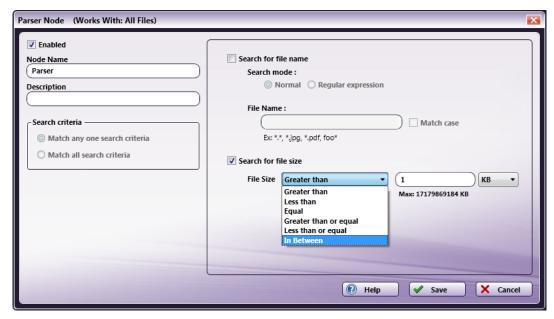
- Load Text Loads text from another file. You will be directed to a window where you can find and select the file to be loaded. Note that the file size should not exceed 2 MB.
- Cut Moves text to clipboard.
- Copy Copies text to clipboard.
- Paste Pastes text from clipboard.
- Undo Reverses the last action performed.
- Redo Repeats the action that had previously been "undone."
- Line numbers Displays/hides line numbers.
- White spaces/tabs Displays/hides white spaces and tabs.
- Text wrap Keeps the text in the viewable area.
- Line ends Displays/hides markers signifying the end of the line.
- Custom line ends Choose what kind of markers to use to specify line endings from now on when inputting text: Windows, Unix, or Mac.

Note: After completing the Insert operation, all of the "Search For" results are cleared.

Parse (Search)



The simplest parser process performs a *Search* operation. The *Parse* process only searches the file attributes, such as name, type and size. Based on the results, files are then passed on to destinations within the workflow depending on the set criteria. To open the *Parser Node* window, add a process node for *Parser* and double-click on it.



- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Parse node.

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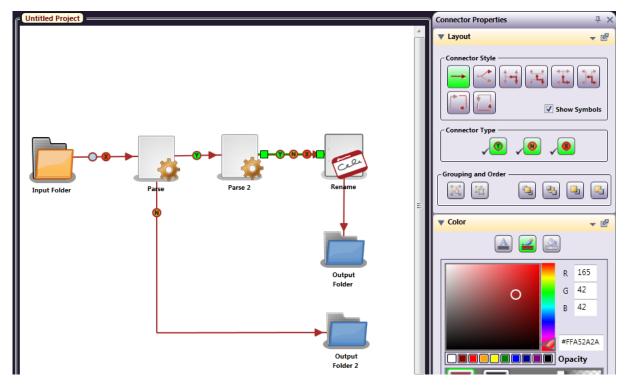
- In the **Description** field, enter a description for the Parse node. Although this is not required, it can be helpful in reminding you which *Process* is active in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the Search criteria box, specify whether the results should include files that match any of the search criteria (Match any one search criteria radio button) or should include files that match all of the search criteria (Match all search criteria radio button).
- To search by file name, check the **Search for file name** box; then do one of the following:
 - To search the file name for the exact text entered or for specific file types, such as JPG or PNG), select the Normal radio button; then specify
 the text or file types with an asterisk, separated by commas, in the File Name field. Check the Match case box to include only file names
 which match the case entered,

or

- To search for a pattern rather than words or phrases, select the Regular expression radio button; then specify the expression in the File Name field.
- To search by size, check the **Search for file size** box; then specify the size units and appropriate math operator. When you choose the **In Between** option, you will need to specify two values; those limits will be included in the search results.
- Select the **Save** button to keep the Parse definition and add a connector to the next node in the workflow. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Note: A connector from a Parse node has more details than a regular routing connector, implying set conditions.

With the Parse node saved and a connector to a printer distribution point, conditions for the transition must be defined. A parse node can have up to 3 outbound connectors, Yes, No, or Error, as shown in the following illustration. Regular (non-parser) nodes, can have two outbound transitions. These can be manually changed under *Layout Properties*.



Add References as Metadata

When using regular expressions with *named* subgroups within your search operation, you can create metadata out of the subgroup(s) for use in other nodes in the workflow. Note that metadata is not created for numbered references.

For example, to capture the value in the beginning of a file named "25-file.pdf," you could do the following:

- · Check the Search for File Name box.
- Click the **Regular Expression** radio button.
- In the File Name field, enter: ^(?<Count>.+)-

To reference the named subgroup, you would use the class of "parser" with the subgroup's friendly name, separated by a colon (:). In the example above, to reference the subgroup, you would use {parser:Count} to capture the value of "25."

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File Processing

Merge



Use the **Merge node** to combine two or more files into one or more output files. You can group, sort, and merge selected forms, and then output to TIFF/PDF files.

For example, the Merge node allows for the following sample workflow:

- 1. Automatically capture scanned documents from any Konica Minolta MFP, virtual printer queue, or other files via a Dispatcher Phoenix workflow.
- 2. Parse the files based on sequential file name or document metadata and convert the files to a single merged file.
- 3. Route merged files to one or more processing operations, including but not limited to:
 - Barcode Writer
 - CDA Generator
 - Deskew
 - Despeckle
 - Highlight/Strikeout
 - Metadata Route
 - Redact
 - Rename
- 4. Route processed documents to one or more distribution nodes, including but not limited to:
 - Output Folder
 - Email Out
 - HTTP Out
 - Google Drive Connector
 - Worldox Connector

Note: Workflows that use the Merge node require a collection node that can collect files as a group. In the collection node, be sure to check the box at the **Process files as a group** field (some nodes name this field **Process as group**). If you leave that box blank, the Merge process cannot merge the files. The following collection nodes can collect files as as group:

- Input Folder
- MFP User Box
- Email In
- Dropbox In
- FTP In

Using the Merge Node

The Merge node supports the following file formats:

- HD Photo
- TIFF
- JPG
- GIF
- PNG
- BMP

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• PDF (but does not support merging encrypted PDF files)

The Merge node executes operations in the following order:

- 1. Groups files
- 2. Sorts the files in the groups
- 3. Merges the files in the sorted groups

Merge node workflows generate a name for the output file. It consists of the following:

- 1. The name of the first file in the group, minus its extension (.JPG, .PNG, etc.).
- 2. An incremental counter number appended to that filename. The number increments automatically for each group of successfully merged files (e.g., report-1.tiff, somereport-2.tiff, etc.).

File size may change after the merge operation and the number of files does not necessarily equal the number of pages.

Files containing multiple pages cause some merged files to contain more pages than others. To ensure an equal number of pages, we recommend you run a **Split** process on files prior to merging.

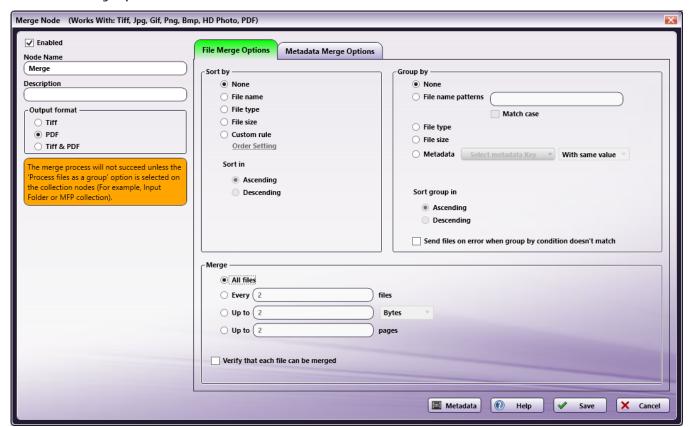
The Merge node can combine document-level and page-level **metadata** from incoming files. In this way, you can use metadata for processing/routing files in the workflow (e.g., renaming files, annotating files, etc.).

Additional merge options are available, including the ability to set the upper limit for merging according to the processing limit of the next node in the workflow

Configuring the Merge Node

To open the Merge node window, drag-drop a Merge node onto the workflow area and double-click on it. The Merge node window appears, containing the following tabs:

- File Merge Options
- · Metadata Merge Options



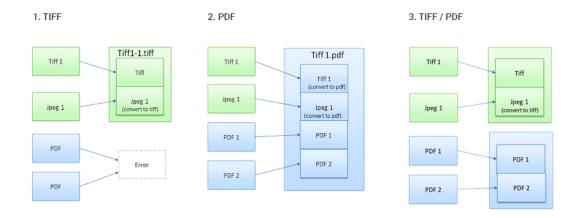
To the left of the tabs, the following fields appear:

• **Enabled** - To include this Merge node in the workflow, check the box at this field. Otherwise, the workflow ignores this node and documents pass through as if the node was not present. Note that disabled nodes do not check for logic or error conditions.

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- Node Name Enter a meaningful name for this Merge node.
- **Description** Enter a description for this Merge node.
- Output format Select the format for the outputted merge documents. You have the following options:
 - TIFF Merge multiple static image files into single TIFF files. This format does not support PDF files. PDF files are sent to the Error Path.
 - PDF Output supported file types to a PDF.
 - TIFF and PDF Output supported file types to TIFF and/or PDF. Static images are outputted as a merged TIFF file. PDF files are outputted as a merged PDF file.

See the following diagrams for illustrations of the output formats:



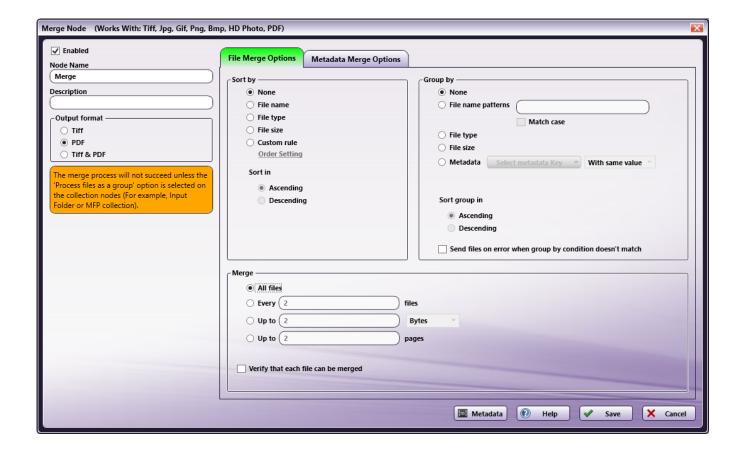
The following buttons appear on the bottom of the Merge node window:

- Help Click to access Online Help.
- Save Click to keep the Merge definition.
- Cancel Click to exit the window without saving any changes.

File Merge Options Tab

Use this tab to specify your preferences for sorting, grouping, and merging the files collected by your workflow.

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Sort by

Use this panel to set the order by which to merge the files collected by the previous input/processing node in the workflow. Note that before sorting, the Merge first applies any grouping configurations you specify. You have the following configuration options:

- None Do not sort documents.
- File Name Sort documents by file name.
- File type Sort documents by file type or extension.
- File size Sort documents by file size.
- Custom rules Control the merge order using metadata. Configure the order on the Sort by custom rules screen. See the Custom Rules section below for further information.
- Sort in If you choose to sort by one of the file attribute fields above, this field activates and you have the following options:
 - Ascending Sort the files so the lowest values are at the top of the list.
 - **Descending** Sort the files so the highest values are at the top of the list.

Custom Rules

To configure the merge order using metadata, select **Custom rule** in the **Sort by** panel, then click on **Order Setting**. The **Sort by custom rules** window appears.

Use the **Sort by custom rules** window to create a table of rules to determine the merge order. To add a rule, click on the + button on the right of the Header bar.



Once the rule appears in the table, you have the following configuration options:

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- Metadata Key Click on the drop-down to access the Metadata Browser window, from which you can select a metadata key.
- Sort by Specify the sort order. You have the following options:
 - **Ascending** Sort the files so the lowest metadata values are at the top (special [#, \$, etc.] -> numeric [0-9] -> alphabetic [A-Z]). If the same metadata key exists in multiple files, the original records order establishes the order.
 - **Descending** Sort the files so the highest metadata values are at the top (alphabetic [Z-A] -> numeric [9-0] -> (special [\$, #, etc.]). If the same metadata key exists in multiple files, the original records order establishes the order.
 - Custom rule Configure a custom rule string to determine the sort order. When you select this option, the Custom rule field activates
 where you can specify a rule consisting of one or more comma-separated values (CSV). Ordering compares the string to the metadata value.
 Any unmatched metadata is ordered to the end.
- · Move Up/Down Change the custom rule sorting order using the Up arrow and Down arrow buttons.
- + Use the + and X buttons in this column to add or remove a rule, respectively. The + button on the Header bar inserts a new rule at the top of the list.



Note: When working with multiple rules, once the first custom rule executes, the second custom rule then runs on each individual group of files created by the first rule, the third rule runs on files created by the second rule, and so on. For example, if Rule 1 sorts files by file extension and Rule 2 sorts by file name, Rule 2 will run on each group of files that have the same file extension, not the entire group of files.

Group By

Use this panel to specify criteria to separate the collected files into groups prior to merging. For each group created by your configuration, the node creates a separate output file containing the merged files. Files that do not match the criteria are placed in a "not match" group.

You have the following configuration options:

- None Process documents as a single group.
- File name patterns Group files using naming rules. If you select this option, the associated field activates and you can enter one or more comma-separated values (CSV) to identify your groups, for example the following:
 - *_book.png
 - *.jpeg
 - Match case If you select the File name patterns option, this field activates. To require your CSV values to match the upper and/or
 lower case letters of the file names before adding them to the group, check the box. Otherwise, leave the box blank.
- File type Group files by file extension.
- File size Group files using the original file size:
 - Tiny (less than 100 KB)
 - Medium (from 100 KB to 1 MB)

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- Large (from 1 MB to 16 MB)
- Huge (over 16 MB)
- Metadata Group files by metadata values using the metadata's key value (document & page level). For example, you can choose to group by all invoices from the same company (requires OCR). If a document has multiple same metadata key values, this option uses the first one found.

If you select this option, the **Select Metadata Key** button activates. Click on this button to access the **Metadata Browser window** where you can select a metadata key to establish your group criteria. Files that do not include the specified metadata are placed at the end of the sorted files list.

After you select a metadata key, click on the drop-down to the right and select a **condition**. Several of the conditions require you enter a **condition string** defining your search criteria. You can select any of the following conditions:

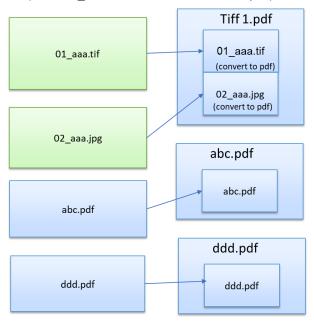
- With same value Group by the same metadata key's value.
- Is Group by matching specified condition strings to the metadata values.
- Contains Group by the metadata value containing a specified condition string.
- Regular expression Group by matching the metadata value with a regular expression.
- Exist Group files if the metadata key exists.
- Has value Group files if the specified metadata key has any value.
- Isn't Group by not matching specified condition strings to the metadata values.
- Does not contain Group files by the metadata key's value not containing a specified condition string.
- Does not have value Group files if the metadata key does not have any value.
- Does not exist Group files if the metadata key does not exist.
- Sort group in If you choose a Group by option, this field activates and you can specify an order in which to sort the groups (not the files in the groups). Options are:
 - Ascending Sort the groups so the lowest values are at the top.
 - **Descending** Sort the groups so the highest values are at the top.
- Send files on error when group by condition doesn't match To send files out on error if documents don't match the grouping rules, check the box at this field. Otherwise, leave the box blank.

See the following diagrams for illustrations of the grouping options:

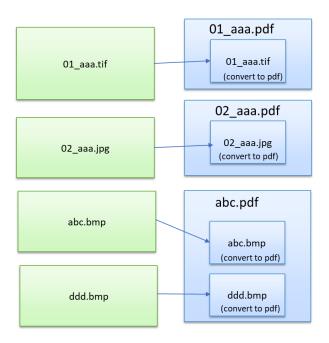
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1. File name patterns

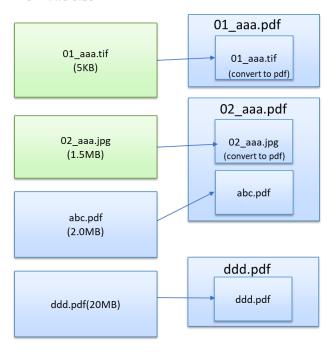
(Rule 1:*_aaa.*, Rule 2: abc.* Rule 3:*.pdf)



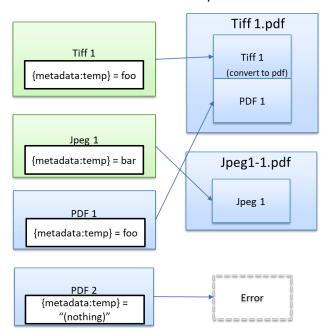
2. File type



3. File Size



4. Same value of metadata key



Condition Strings

When grouping files by metadata, several conditions require you enter a condition string in the associated field to define your search criteria. You can enter one or more comma-separated values into the field. If the search finds multiple matches in a file's metadata key value, it groups the file based on the first match found.

For example, assume you want to group your collected files based on whether they contain the metadata values "ab,abc,abcd". Take the following stens:

- 1. Select the metadata key containing the values you want to search for.
- 2. Select "Contains" as your condition.

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3. Enter a condition string of "ab,abc,abcd".

This configuration groups together all files containing the first metadata value (ab), even if they also contain instances of "abc" and/or "abcd". With all files containing the first metadata value (ab) having been grouped together, the node now groups together all files containing the next metadata value (abc), even if they also contain instances of "abcd". This process continues until all metadata values have been examined.

Merge

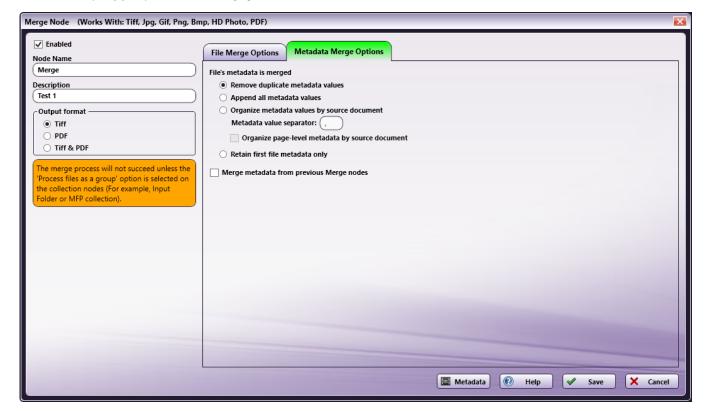
Use this panel to specify your preferences for merging. You have the following options:

- All Files Merge all files.
- Every x files Specify how many single files to merge into a merged file before moving on to another output file. You can merge up to 100,000 files into a single merged file.
- **Up to x bytes** Specify the maximum file size for single files being merged into a merged file. The maximum file size for the merged file is 4 GB. Note that this option may decrease performance as it creates a temporary file which is a converted output format for estimating merged file size.
- **Up to x pages** Specify how many pages to merge from the single files into a larger file. You can merge up to 100,000 pages into a single merged file.
- Verify that each file can be merged To verify a document can be merged before attempting to merge it, check the box at this field. If you choose this option, files that cannot be merged (for example, encrypted PDF files) are ignored by the merge file counting process. To always attempt to merge each document, leave the box blank. If you choose this option, files that cannot be merged are still counted by the merge process.

For example, assume you are set to merge every two files. If you check the box and the second file cannot be merged, the second file will be skipped and third file will merge with the first file. If you leave the box blank, the second file will be counted even though it cannot be merged and the third file will be added to the next sequential merge file.

Metadata Merge Options Tab

Use this tab to specify your preferences for merging metadata from collected files.



Use the following fields to configure how to handle existing metadata upon merge.

- Remove duplicate metadata values Remove any document-level metadata keys that have the same values. For example, you can select this if you are interested only in unique values associated with a specific metadata key. Click here for an example.
- Append all metadata values Merge all metadata keys that match between documents and keep all values. Click here for an example.

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- Organize metadata values by source document Combine metadata keys containing multiple values in each document, separated by a user-specified separator symbol. The default separator is a comma. The files list in the same order they were merged, per the merge:input.fullname metadata key. For example, you can select this option if the workflow needs to tie the source of a metadata value to its value in the merged document. Click here for an example.
 - Organize page-level metadata by source document Index the page-level metadata in the same way as the document-level
 metadata, preserving the indexing from the merge:input metadata lists. If you do not select this option, page-level metadata is merged into
 the resulting document as-is. Page-level metadata does not conflict with a merged document in the way that a document-level metadata
 can.
- Retain first file metadata only Copy the metadata for the merged file from the first file and discard metadata from all other files. This setting ignores not only the Merge node's metadata, but also the previous node's metadata. Click here for an example.
- Merge metadata from previous Merge nodes When multiple Merge nodes occur in a workflow, select this option to carry over and update the following data:
 - merge:input.fullname The full file names (name and extension) from the previous merge operation are preserved and the file names from this merge operation are appended in the order they were merged.
 - *merge:input.name* The file names (extension not included) from the previous merge operation are preserved and the file names from this merge operation are appended in the order they were merged.
 - merge:input.ext The file extensions from the previous merge operation are preserved and the file extensions from this merge operation are appended in the order they were merged.
 - merge:input.size The file sizes from the previous merge operation are preserved and the file sizes from this merge operation are appended in the order they were merged.
 - merge:total The total number of merged files is updated with the previous number of merged files added to the new number of merged files

Note: If you do not select this option and multiple merge nodes occur in a workflow, metadata generated from the previous Merge node (e.g., all metadata starting with *merge:*) are removed and not carried over.

Merge Node Metadata

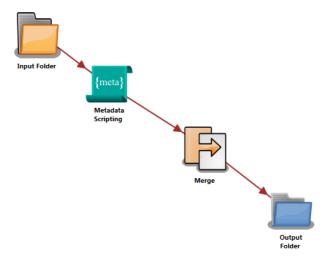
The following metadata is created by the Merge node:

Metadata	Description
merge:input.fullname:	The names and extensions of the files that were merged to create the output document. The file names appear in the order in which they were merged. This metadata key can be used to determine the origin of metadata information when the Organize metadata values by source document option is selected.
merge:input.name:	The names (excluding file extension) of the files that were merged to create the output document. The file names appear in the order in which they were merged. This metadata key can be used to determine the origin of metadata information when the Organize metadata values by source document option is selected.
merge:input.ext:	The file extensions of the files that were merged to create the output document. The merge:input.fullname and merge:input.name metadata can be used to determine the original document that the extension is associated with.
merge:input.size:	The file size of the files that were merged to create the output document. The merge:input.fullname and merge:input.name metadata can be used to determine the original document that the size is associated with.
merge:input.from:	The page numbers in the merged document of the first page of each merged file. merge:input.fullname and merge:input.name metadata can be used to determine the original document that the page number is associated with.
merge:input.to:	The page numbers in the merged document of the last page of each merged file. Page numbers are inclusive. The merge:input.fullname and merge:input.name metadata can be used to determine the original document that the page number is associated with.
merge:total.pages:	The total number of pages that were merged.
merge:total.files:	The total number of files that were merged.
merge:id:	The unique identifier of the merge operation.

Merge Node Metadata Examples

The examples in this section are based on the following sample workflow:

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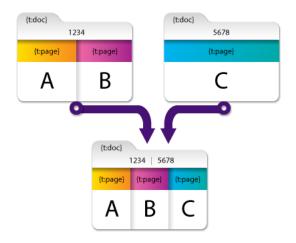
In this workflow:

- 1. The **Input Folder** collects two or more images.
- 2. The Metadata Scripting node adds:
 - A single document-level metadata value to each image using the {t:doc} metadata key.
 - Page-level metadata to each page of each image using the {t:page} metadata key.
- 3. The Merge node merges these two documents and their metadata together.
- 4. The **Output Folder** distributes the newly merged document in a folder.

Remove Duplicate Metadata Values Example

This section provides an example of the effects of the **Remove Duplicate Metadata Values** field. If you select this option, then when documents are merged, document-level and page-level metadata are merged while redundant values for metadata keys are removed by default.

Example 1:



In this example, the first document contains the following metadata:

- Document-level metadata: {t:doc} with a value of '1234'.
- Page-level metadata:
 - On first page: {t:page} with a value of 'A
 - $\circ~$ On second page: {t:page} with a value of 'B'

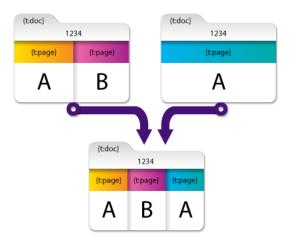
The second document contains the following metadata:

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- Document-level metadata: {t:doc} with a value of '5678'.
- Page-level metadata on its (only) page: {t:page} with a value of 'C'

Although both of these documents contain the same metadata key ({t:doc}), their values are unique and are carried over into the resulting merged documents. ({t:doc} now contains two values: '1234' and '5678'). Their page-level metadata is also merged.

Example 2

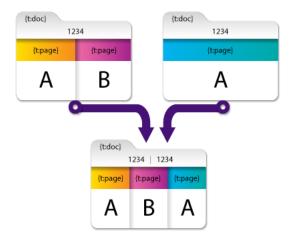


In this example, the first and second document have a document-level metadata key ({t:doc}) with the SAME value ('1234'). With the **Remove duplicate metadata values** option enabled, the redundant value for {t:doc} is removed from the merged document, resulting in a single value of '1234.'

Note: The page-level metadata of {t:page} is not removed even though the first document's first page and the second document's first page have the same metadata key and value ('A'). This is because the values are on different pages and are, therefore, not considered redundant.

Append All Metadata Values Example

This section provides an example of the effects of the **Append all metadata values** field. Select this option if you are interested in all values associated with a specific metadata key (e.g., counting the number of occurrences of a particular metadata value).

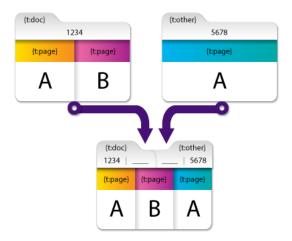


In this example, both of the values of the {t:doc} metadata key are retained and the resulting merged document has two values for {t:doc}: '1234' and '1234'.

Organize Metadata Values by Source Document Example

This section provides an example of the effects of the **Organize metadata values by source document** field. This option handles metadata differently than the other options, as in the following illustration:

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In the above example, document-level metadata is padded with blanks. This is because document-level metadata in Dispatcher Phoenix is accessed using the following format:

\ : \ (e.g., {t:doc})

which is short for the following format:

\ : \ [0] [value index]

This format is also used for page-level metadata, for example, in the above illustration:

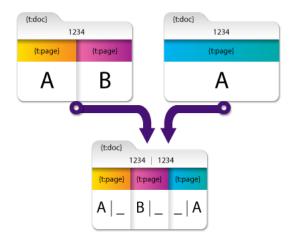
- For page 1 of the merged document, "A" can be accessed using {t:page [1] [1]}
- For page 2 of the merged document, "B" can be accessed using {t:page [2] [1]}
- For page 3 of the merged document, "A" can be accessed using {t:page [3] [1]}

In the resulting merged document in the above example:

- {t:doc[0] [1]} contains the value from the first document and contains a blank in {t:doc[0] [2]} because the second document did not contain that key.
- {t:other[0] [1]} is blank because the first document did not contain a value for this key but {t:other [0] [2]} contains the value from the second document.

This allows the origin of a particular metadata value to be identified by cross referencing the index of the value with the index of the document name.

If you select the Organize page-level metadata by source document option, the result is as follows:



Now, the resulting merged document has page-level metadata blanks that indicate the document from which the metadata originated:

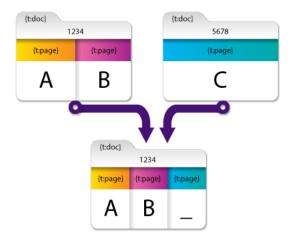
- $\bullet \ \ \{\text{t:page[1] [1]}\} \ \, \text{and} \ \, \{\text{t:page[2] [1]}\} \ \, \text{contain the values "A" and "B" since they originated from the first document.}$
- {t:page[3] [2]} contains the value "A" since it originated from the second document.

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With these options, document-level and page-level metadata can be mapped with its source.

Retain First File Metadata Only Example

This example illustrates the effects of the Retain first file metatdata only field.



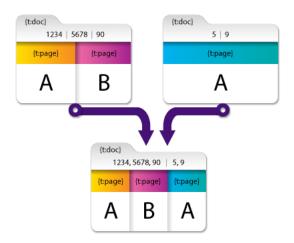
In this example, the two files to be merged each have their own metadata:

- document-level (denoted by numbers "1234" & "5678" in the diagram)
- page-level (A, B, and C in the diagram)

With the **Retain first file metadata only** field selected, the two files merge but only the metadata from the first file are retained ("1234" & "A, B") while the metadata from the second file ("5678" & "C") are stripped out.

Aggregating Metadata

When there are multiple metadata values for a single key in a single document, the values are combined together into a single index and separated (by the user-specified separator that was defined during node configuration). See the following illustration for an example:



In the first document, {t:doc} contains three values, and in the second document, {t:doc} contains two values. In the resulting merged document, the {t:doc[0] [1]} Metadata Key contains the value '1234,5678,90' and {t:doc[0] [2]} contains the value '5,9.'

Split

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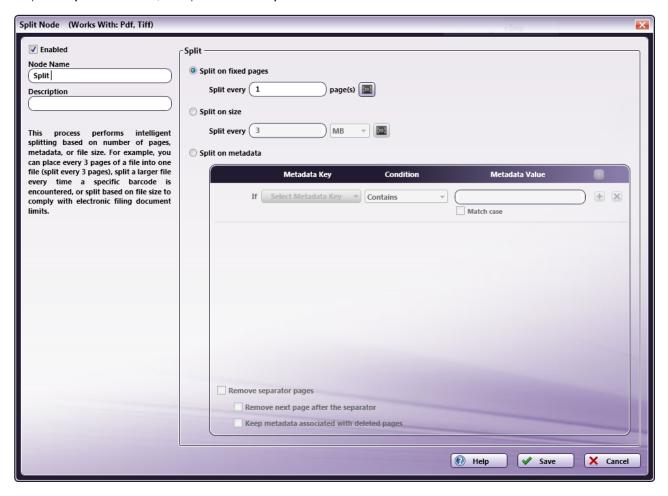


The **Split** process splits multi-page image files into individual files based on a user-defined number of pages, file size, or specific metadata conditions. This node works with PDFs and TIFFs.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

After a split image process is run, the resulting filenames will be derived from the original filename plus the addition of a hyphen and a sequence of numbers, -1, -2, -3 etcetera. For example, if the original filename was "MyFileOne" and it was split into two images, the resulting filenames will be "MyFileOne-1" and "MyFileOne-2."

To open the **Split Node** window, add a process node for **Split** and double-click on it.



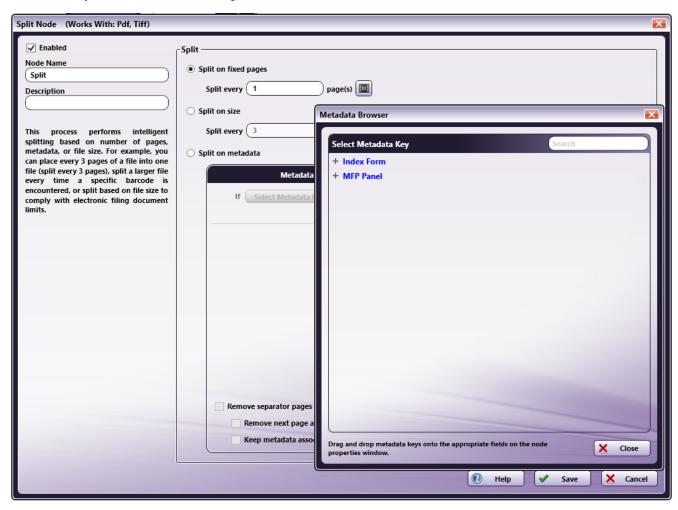
- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Split node.
- In the **Description** field, enter a description for the Split node. Although this is not required, it can be helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- Select the **Save** button to keep the Split definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Split On Fixed Pages

To split the incoming file based on pages, select the **Split on fixed pages** radio button; then enter how often you want the incoming file split into smaller files. For example, enter 3 to separate 1 file into multiple 3 page files.

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You can use a metadata value in this field by clicking on the **Metadata Browser** button to open up the Metadata Browser window and drag-dropping the metadata key into the field, as in the following illustration:



To specify a page-level and/or occurrence number for the metadata reference, enter the correct syntax after drag-dropping the metadata into the field.

Split On Size

To split the incoming file based on size, do the following:

- 1. Select the **Split on size** radio button.
- 2. Specify the **maximum file size** for each document in the entry field provided.
- 3. You can use a metadata value in this field by clicking on the Metadata Browser button to open up the Metadata Browser window and drag-dropping the metadata key into the field. See the illustration above for an example of the Metadata Browser window. To specify a page-level and/or occurrence number for the metadata reference, enter the correct syntax after drag-dropping the metadata into the field.
- 4. Choose the appropriate size units (bytes, KB, MB, GB).

For example, if you choose to split every 5 megabytes, all output files will be less than or equal to 5 MB.

Split On Metadata

To split the incoming file on metadata that meets specific conditions, select the Split on metadata radio button; then do the following:

- 1. Select which metadata to use as a condition using the **Select Metadata Key** drop-down list.
 - Note: The Select Metadata Key window will not display Date, File, or File System dynamic variables since files cannot be split on those variables.
- 2. Specify a condition and metadata value using the **Condition** drop-down list and **Metadata Value** input field. Check whether or not you want to match the case of the Metadata Value entered using the **Match case** box.
- 3. Remove page(s) that triggered the split by checking the Remove separator pages box. This is an optional step.

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When you are done, you can click on the **plus icon** to add more conditions, or click on the **X icon** to delete a condition.

Step #1: Selecting Metadata

You can choose to use any metadata associated with documents in the workflow. When you click on the **Select Metadata Key** button, the Metadata Browser will appear, listing all of the metadata available, categorized by metadata type. For example, if you have created a zone in an Advanced OCR node, that zone would be listed in the pop-up window, under the OCR heading. On the Metadata Browser, you can do the following:

• Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you are interested in LPR metadata, click on the + sign next to LPR and the following expandable list will appear:



- Collapse the list by clicking on the sign next to the appropriate metadata.
- Choose metadata to use as the split trigger by clicking on the metadata and clicking on the Select button. At this point, the Metadata Browser will close and you will return to the Split window.
- Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.

Step #2: Specifying Conditions And Values

Next, you can choose the appropriate option from the **Condition** drop-down list. Options are: Is, Contains, Regular Expression, and Exists. If you choose **Exists**, then the **Metadata Value** field will disappear. Otherwise, enter the appropriate value in the **Metadata Value** field. In the following illustration, a rule has been set up to split documents every time an invoice containing '195' is encountered:



Step #3: Remove Separator Pages

As an option, you can choose to remove the separator page(s) containing barcodes or other metadata that met the specified rules and were used to split the file. For example, this option is useful to remove any barcode separator sheets. Do the following:

- Check the Remove Separator Pages box.
- To accommodate for any front-and-back printed pages, check the Remove next page after the separator box.
- When specifying that pages be removed, you may still want to keep the metadata that is associated with them (e.g., if you want the barcode that triggered the split to still be referenced later in the workflow). In this case, check the **Keep metadata associated with deleted pages** box.

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Since the page that the metadata referred to will no longer exist in the output document, this metadata can be referenced by using a page number of "0," which means document-level.

Split Metadata

Once a Split node is defined in a workflow, it can be referenced by other nodes in the workflow. You can use the Metadata Browser window to choose the Split metadata key. Split metadata includes:

- {split:errors} The number of recoverable errors encountered while processing the input document. The following errors are considered "recoverable":
- **Split on metadata** with the **Remove Separator Pages** option results in a 0 page document (e.g., the workflow splits on a barcode cover sheet but the user scans two sheets as duplex, or the cover sheet is the last page).
- Split on size cannot fulfill the requirements (e.g., even after splitting into a one-page document, the file is larger than the target page size).

If no errors are encountered during processing, {split:errors} metadata will NOT be added to the output files.

- {split:from} The page number of the input file that is used as the first page of the new document.
- {split:id} The index of the output document. (e.g., the "2" in "2 of 5").
- {split:input.ext} The input file's extension (file name starting from the last period and going to the end).
- {split:input.fullname} The input file's name and extension.
- {split:input.name} The input file's name (up to the last period and not including the file extension).
- {split:input.size} The input file's size (in bytes).
- {split:to} The page number of the input file that is used as the last page of the new document.
- {split:total} The number of files that were generated by the split of the input file (e.g., the "5" in "2 of 5"). When Dispatcher Phoenix is set to collect all files at once ("as a group"), the total value will be for the number of total files per group. For example, when processing a group of 5 10-page files set to split every 1 page, Split will output 50 files; the {split:total} will be 10 for all 50 files.
- {split:unmodified} This metadata key exists only if the input file remains unchanged (no split was performed).

Important! Fatal errors that cause the Split node to output the input file on Error will NOT add any split metadata to the input file (e.g., if the file format is not supported).

Grading

Bubble Grader



Grader

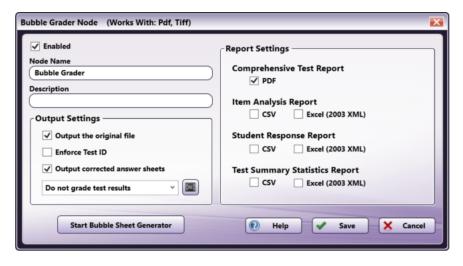
The Bubble Grader process is part of the overall test grading and assessment solution for educators and administrators in K-12 as well as colleges and universities. With the Bubble Grader process, Optical Mark Recognition (OMR) bubble sheets are automatically graded and reports are generated.

Notes:

- This node works only with tests, weight sheets, and answer keys that have been created by the Bubble Sheet Generator Tool.
- This node supports only TIFF and PDF file formats. Please note that the following PDF compression methods are not supported:
 - CCITTFaxDecode
 - JBIG2Decode
 - JPXDecode
 - Crypt
- When complete, the test packet will be in the following order:
 - answer key
 - o optional weight sheets
 - student answer sheets

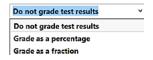
To open the Bubble Grader Node window, add a process node for Bubble Grader and double-click on it.

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Do the following:

- 1. Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- 2. In the **Node Name** field, enter a meaningful name for the Bubble Grader node.
- 3. In the **Description** field, enter a description for the Bubble Grader Node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. In the Output Settings area, choose which files you want to be outputted. Options are:
 - Output the original file This box should be enabled in order to output the original files along with the corrected tests.
 - **Enforce Test ID** This box should be enabled if teachers want to ensure that they've collected the right group of tests. When enabled, the Test ID on the answer sheets and optional weight sheets MUST match the Test ID on the answer key in order for processing/grading to occur. In addition, if the Test ID listed on an answer sheet does not match the Test ID on the answer key, processing will not occur.
 - Output corrected answer sheets This box should be enabled in order to output corrected tests.
 - Grade test results This drop-down gives you the option to display the test score on each of the students' answer sheets.



- Do not grade test results This is the default setting if you choose not to have the test score displayed on the printed Student Answer Sheets.
- Grade as a percentage This option allows you to display test scores in the form of a percent on the Student Answer Sheets.
- Grade as a fraction This option allows you to display test scores in the form of a fraction on the Student Answer Sheets.
- 5. In the Reports Settings area, choose which reports you want to generate as well as their file format. Options are:
 - · Comprehensive Test Report (PDF only)
 - Item Analysis Report (CSV or Excel 2003 XML)
 - Student Response Report (CSV or Excel 2003 XML)
 - Test Summary Statistics Report (CSV or Excel 2003 XML)
- 6. Select the **Start Bubble Sheet Generator** button to create your own answer key/answer sheets.

Test Requirements

When filling out the Student Answer Sheets, test-takers should:

- Use black/blue ballpoint pen or #2 pencil to completely fill out the bubbles.
- Avoid partially filling out bubbles. Do not leave the center of the bubble empty.
- Mark responses only in the space provided for that purpose. No other areas of the answer sheets should be written on.
- · Completely erase any changed answers.

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Corrected Tests

Bubble Grader automatically grades the student answer sheets, as follows:

• Right answers are circled in green. In the following illustration, E was answered correctly by the student:









• Wrong answers are marked with a red X and the correct answer is circled in red. In the following illustration, E was answered incorrectly by the student and the correct answer is C:











• Test grades can be displayed as either a percent or a fraction at the top right corner of the page as shown below:



Generated Reports

Bubble Grader can generate the following reports:

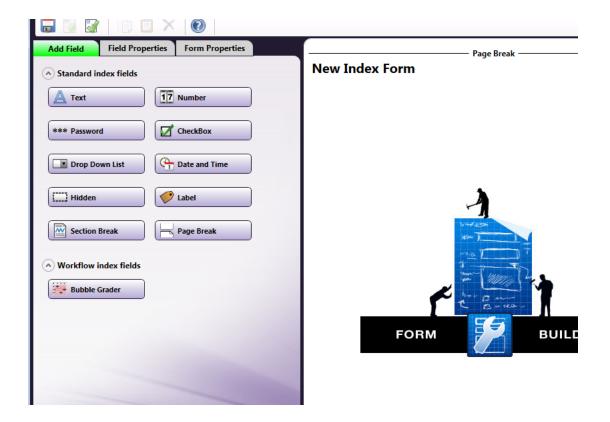
- Comprehensive Test Report This report combines all data in an all-encompassing PDF report.
- Item Analysis Report This report provides a breakdown of each item and the frequency/percentage of students that responded to each question correctly and incorrectly.
- Student Response Report This report provides data on each individual student's responses to each question.
- Test Summary Statistics Report This summary report gives basic statistics on test grades as a class overall. Statistics include mean, median, standard deviation and range.

Creating a Bubble Grader Index Form

The Bubble Grader process can be set up to run automatically or you can create a Bubble Grader Index Form to allow the MFP user to specify Bubble Grader settings directly at the MFP. To create a Bubble Grader index form, do the following:

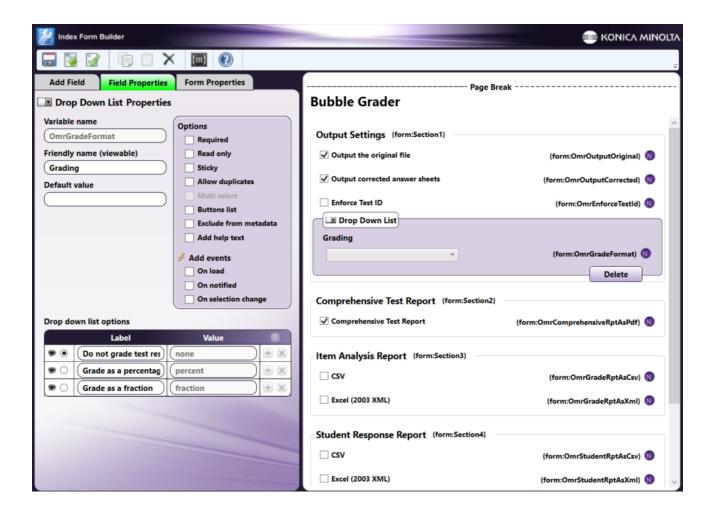
- 1. Add a MFP Panel node to your workflow.
- 2. Double-click on the **MFP Panel** node to open up its node properties window.
- 3. Check the **Attach Index Form** button; then click on the + icon to create a new Index Form.
- 4. On the Create new index form window, select the **Blank Index Form** button.
- 5. On the Index Form Builder, you should see a button for **Bubble Grader** on the bottom left hand side of the window, as in the following illustration:

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6. Drag-drop the **Bubble Grader** button to the canvas area of the Index Form Builder window. Bubble Grader fields will be automatically created, allowing the MFP user to specify Bubble Grader settings. Refer to the following illustration for an example:

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Bubble Grader Metadata

The Bubble Grader process outputs the following metadata:

Document Level

Document level metadata is added to all documents that leave the Bubble Grader process on a "Normal" transition.

- {omr:questions} Number of questions graded
- {omr:students} Number of tests graded
- {omr:teacher} Teacher ID, if set
- {omr:test} Test ID from Answer Key, if set
- {omr:course} Course Code from Answer Key, if set
- {omr:total_points} Total number of points on test
- {omr:stats.max} Maximum score (if number of tests graded is greater than/or equal to 1)
- $\bullet \ \ \{ omr: stats.min \} \ \, \hbox{- Minimum score (if number of tests graded is greater than/or equal to 1)} \\$
- $\bullet \ \ \{ omr: stats.mean.raw \} \ \ \, \text{Mean score (if number of tests graded is greater than/or equal to 1)} \\$
- $\bullet \ \ \{ omr: stats.mean.percent \} \ \ Mean \ percent \ score \ (if \ number \ of \ tests \ graded \ is \ greater \ than/or \ equal \ to \ 1)$
- {omr:stats.range} Range of scores (if number of tests graded is greater than/or equal to 1)
- {omr:stats.deviation} Standard deviation (if number of tests graded is greater than/or equal to 1)
- $\bullet \ \ \{ omr: stats.variance \} \ \ \, \text{Variance (if number of tests graded is greater than/or equal to 1)} \\$

Page Level

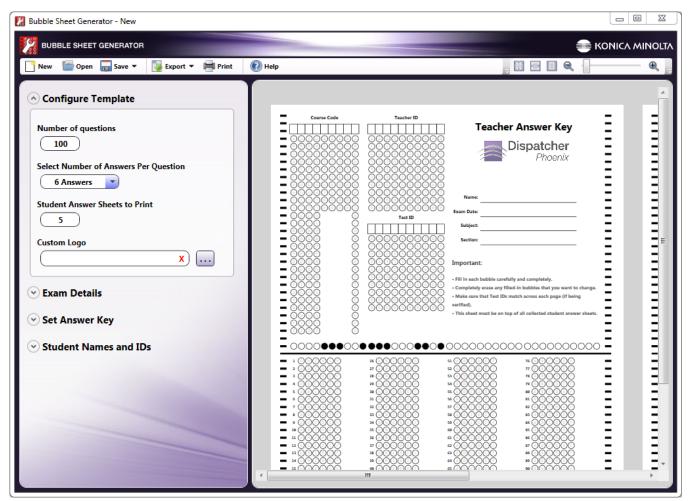
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Student-specific metadata is added to outputted student test sheets.

- {omr:student.correct[page]} Total
- {omr:student.grade[page]} Percent (without percent sign)
- {omr:student.id[page]} Student ID, if set
- {omr:student.first_name[page]} First name, if set
- {omr:student.last_name[page]} Last name, if set
- {omr:student.num_correct} Total number of correct answers
- {omr:student.unanswered} Unanswered questions (if number is greater than/or equal to 1)

Desktop Bubble Sheet Generator

The **Bubble Sheet Generator** is a tool for creating bubble sheet answer keys and student answer sheets for automatic grading and report generation.



Using the Bubble Sheet Generator, you can do the following:

- $\bullet\,$ Customize the number of questions and the number of responses per question.
- Configure how many student answer sheets to print.
- · Customize the Bubble Sheets with a logo.
- Save a customized template.
- Export a customized template as TIFF, PDF, or XPS.
- · Print a customized template.
- Configure the Bubble Sheet tests with course and teacher details.

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- Fill in the answer key.
- · Customize the student answer sheets with individual names and IDs.

Note: Most of the changes that you make will be reflected automatically in the Preview area.

Accessing the Bubble Sheet Generator

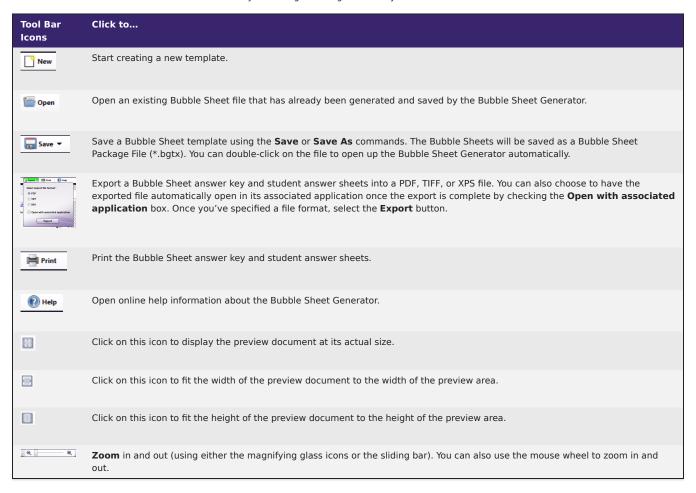
The Bubble Sheet Generator Tool is available from:

- The Windows Start menu (it will be listed underneath the Konica Minolta/Dispatcher Phoenix folder).
- The **Tools** menu from the Dispatcher Phoenix main application screen.
- · The Bubble Grader Processing node properties window.
- The SEC website.

In addition, you can open up the Bubble Sheet Generator tool by double-clicking on a saved Bubble Sheet Generator file (*.bgtx).

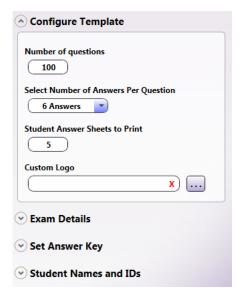
Using the Tool Bar

The menu items and icons on the tool bar can assist you when generating answer keys and student answer sheets.



Configure Template

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In the Configure Template area, you can do the following:

• In the **Number of questions** field, enter the number of questions for the bubble sheet.

Note: The minimum number of questions is one and the maximum number of questions is 200.

• Use the Select Number of Answers Per Question drop-down list to select the number of responses per question.

Note: The maximum number of answers per question is 6. If you have more than 150 questions, you will only be able to select a maximum of 4 answers per question.

- In the Student Answer Sheets to Print field, enter the number of student answer sheets that you want to print.
- If you want to customize the answer key and student answer sheets with a logo to replace the Dispatcher Phoenix logo, do one of the following:
 - Click on the Browse button next to the Custom Logo field. A Windows Explorer window will open, allowing you to browse for and select the logo image that you want to use.
 - Paste a URL for the image in the **Custom Logo** field.

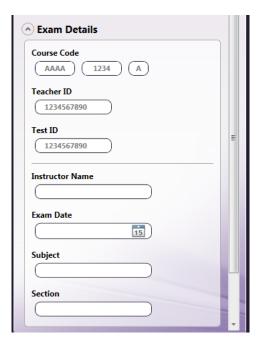
Once you specify a custom logo, the image will appear in the Preview area and also below the **Custom Logo** field, as in the following illustration:



Exam Details

When you click on the down arrow next to **Exam Details**, additional fields will appear, allowing you to customize the answer key, as in the following illustration:

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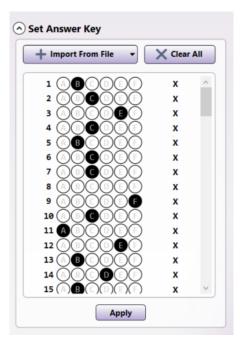
You can do the following:

- In the **Course Code** fields, enter a course code. This will be added to the answer key and student answer sheets. Please note this field only accepts alphanumeric characters.
- In the **Teacher ID** field, enter an ID for the teacher. This will be added to the answer key. Please note this field only accepts alphanumeric characters.
- In the **Test ID** field, enter an ID for the test. This will be added to the answer key and student answer sheets. Please note this field only accepts alphanumeric characters.
- In the **Instructor Name** field, enter the name of the teacher/professor that is giving the test. This will be added to the answer key and student answer sheets.
- In the **Exam Date** field, specify the date of the exam. This will be added to the answer key and student answer sheets. You can use the calendar icon to pop-up a representation of a calendar to easily select a date.
- In the **Subject** field, enter the test subject. This will be added to the answer key.
- In the **Section** field, enter a class section, if necessary. This will be added to the answer key.

Set Answer Key

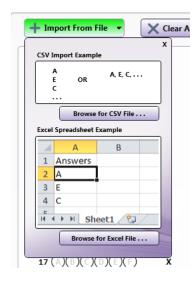
When you click on the down arrow next to **Set Answer Key**, additional fields will appear, allowing you to fill in the answer key with the correct answers, as in the following illustration:

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Do one of the following:

- With your mouse, click on the correct numbered bubbles in the list. Once you click on a bubble, it will automatically be filled in; to clear the selection, click on the x button in the specific row. Once you are done making your selections, select the **Apply** button. The Answer Key in the Preview area will reflect your changes.
- Select the Import From File button to import a CSV or Excel file that has a list of correct answers. The following drop-down palette will appear:



Select the Browse for CSV File... or Browse for Excel File... button to find the correct file. Once you select the correct file for import, correct answers will be automatically reflected in the drop-down palette. You should select the Apply button when you are done; the Answer Key in the Preview area will then reflect your changes.

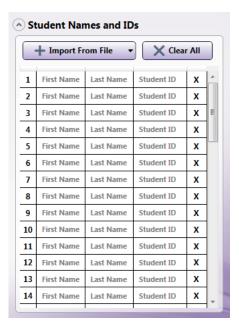
Note: The data imported from the file will be trimmed for content that cannot be bubbled in. For example, if there is more than one letter in a row in the Excel or CSV file, then the entire row in the answer sheet will be left blank.

• Select the Clear All button to clear all selections made.

Student Names and IDs

When you click on the down arrow next to **Student Names and IDs**, additional fields will appear, allowing you to customize the student answer sheets, as in the following illustration:

Konica Minolta 484 / 1597

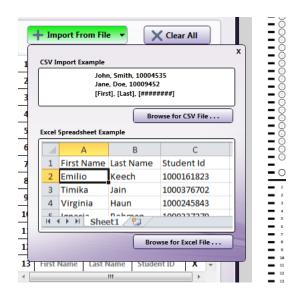


Any information entered here will appear on the student answer sheets only when they are printed or exported.

Note: These fields only accept alphanumeric characters.

Do one of the following:

- With your mouse, enter the student first name, last name, and ID for each student answer sheet. To clear your information, click on the x button in the specific row.
- Select the **Import From File** button to import a CSV or Excel file that has a list of student names and IDs. The following drop-down palette will appear:



Select the Browse for CSV File... or Browse for Excel File... button to find the correct file. Once you select the correct file for import, student information will be reflected in the drop-down palette.

Note: The data imported from the file will be trimmed for content that cannot be bubbled in. For example, if the file contains a student name of "h3i," only "hi" will be bubbled in.

• Select the Clear All button to clear all selections made.

DP Web Bubble Sheet Generator

The Dispatcher Phoenix Web **Bubble Sheet Generator** is the online version of the stand-alone client application for creating Bubble Sheet Answer keys and Student Answer Sheets for automatic grading and report generation. The web version allows you to access the software from any computer

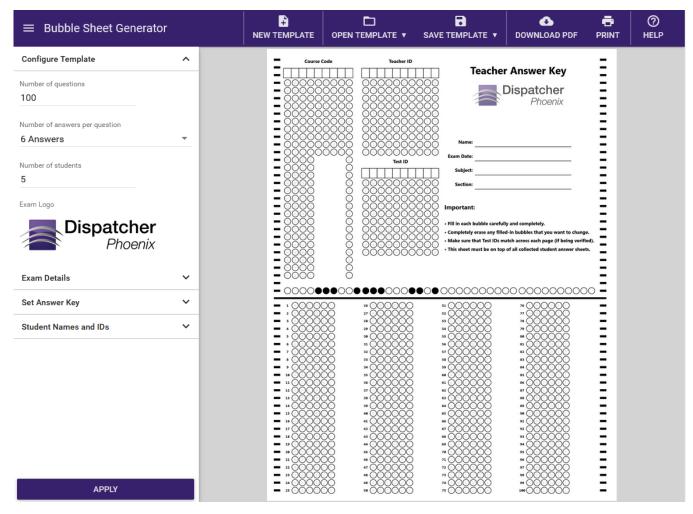
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at any time. This is done by by logging into Dispatcher Phoenix Web with valid Dispatcher Phoenix Web credentials to a computer with a Bubble Grader license.

The Bubble Sheet Generator allows you to:

- Customize the number of questions and the number of possible answers per question.
- Configure how many Student Answer Sheets to print.
- Customize the Bubble Sheets with a logo.
- Save a customized template to the web or download it as a pdf.
- Open a saved template.
- · Import and Export templates.
- Import Teacher Answer Keys and Student Names and IDs.
- · Print a customized template.
- · Configure the Bubble Sheet tests with course and teacher details.
- Fill in the Answer Key.
- Customize the Student Answer Sheets with individual names and IDs.
- Combine existing first name and last name fields into a single field.
- · Assign weighted point values to individual questions.
- Allow multiple correct answers for each question.

Note: Any changes made will be reflected automatically in the Preview area after clicking on the APPLY button.



Accessing the Bubble Sheet Generator

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The Bubble Sheet Generator Tool is available from Dispatcher Phoenix Web with a Dispatcher Phoenix Education License.

• To access the Bubble Sheet Generator app, select the Bubble Sheet Generator tile on Dispatcher Phoenix Web's home page, as shown in the following illustration.



Using the Tool Bar

Everything needed to manage your template can be found in the **Bubble Sheet Generator toolbar:**

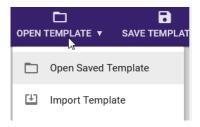


New Template:

This resets your Bubble Sheet template to the default settings of the Bubble Sheet Generator, clearing the current state of the template.

Open Template:

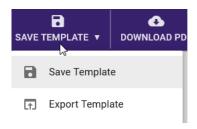
A drop-down menu appears with the options to either open a saved template or import one, as shown in the following illustration:



- Open Saved Template: Allows you to open an existing Bubble Sheet file that has already been generated and saved by the Bubble Sheet Generator so that you can modify or use as needed.
- Import Template: Allows you to select an exported file for import.

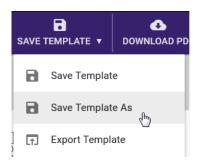
Save Template:

A drop-down menu appears with the options to either save a template or export a template as a .bgtx file as shown in the following illustration:

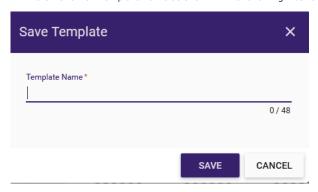


- Save Template: Allows you to save your work to Dispatcher Phoenix Web Storage. Unlike exporting a .bgtx file, the saved templates are not downloaded to the local computer. Therefore, saved templates will be accessible from your account on any computer with **Bubble Sheet**Generator. This option allows you to either overwrite an existing template or save a new one.
- Export Template: Allows you to save a template (.bgtx file) to your computer.

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• Save Template As: This will only be available if the current template has already been saved or imported. Selecting this option will prompt you to enter a new template name as shown in the following illustration:



• If the name is valid it will be saved to your DP Web Storage, and you will be able to access and open previously saved templates without having to upload a .bgtx file.

Download PDF:

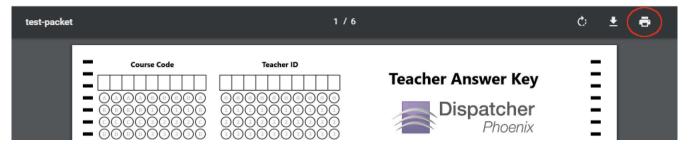
Downloads the current opened template as a PDF file for using/printing at a later date.

Note: When either exporting a template or downloading a PDF, files will be automatically downloaded to your "Downloads" folder if you do not have your browser configured to ask where to save the file before downloading.

Print:

Allows you to print your Bubble Sheet Answer Key, optional Weighted Sheets, and Student Answer Sheets.

Note: If your web browser does not allow pop ups for DP Web then the printable test packet will open in the current browser tab. Additionally, if a print dialog is not automatically displayed simply click the printer icon on the header of the print preview window as shown in the figure below.



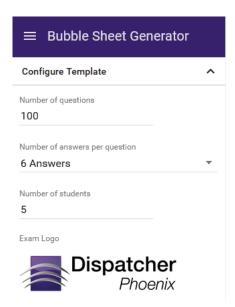
Help:

Opens online help information about the Bubble Sheet Generator.

Configure Template

When you click on Configure Template, additional fields will appear allowing you to design your test template.

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• In the **Number of Questions** field, enter the number of questions for the bubble sheet.

Note: The minimum number of questions is 1 and the maximum number of questions is 200.

• In the Number of Answers Per Question field, use the drop-down list to select the number of responses per question.

Note: The maximum number of answers per question is 6. If you have more than 150 questions, you will only be able to select a maximum of 4 answers per question.

• In the Number of Students field, enter the number of Student Answer Sheets that you want to print.

Note: You will only be able to enter a maximum of 50 students.

• In the **Exam Logo** section, you can upload your own custom image. Simply hover over the Dispatcher Phoenix logo and select the edit icon and navigate to your image.



• To delete an existing logo, hover over the Exam Logo section and click the X (Reset Exam Logo) icon, as shown in the following illustration:

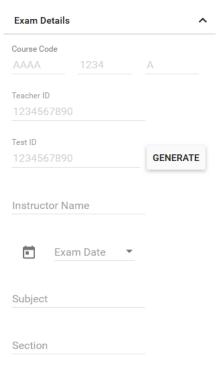


• Once you upload your custom logo, the image will appear in the Preview area and in the **Exam Logo** section.

Exam Details

When you click on Exam Details, additional fields will appear, allowing you to customize the answer key, as in the following illustration:

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Here you can do the following:

• In the Course Code fields, enter a course code. This will be added to the Teacher Answer Key and Student Answer Sheets.

Note: This field accepts alphanumeric characters.

- In the Teacher ID field, enter an ID for the teacher. This will be added to the Teacher Answer Key.
 - The **GENERATE** button next to the Test ID field allows you to automatically generate a test ID when a unique identifier is desired but a specific number scheme is not required.

Note: This field only accepts numeric characters.

• In the Test ID field, enter an ID for the test. This will be added to the Teacher Answer Key and Student Answer Sheets.

Note: This field only accepts numeric characters.

- In the **Instructor Name** field, enter the name of the teacher/professor that is giving the test. This will be added to the Teacher Answer Key and Student Answer Sheets.
- In the **Exam Date** field, specify the date of the exam. This will be added to the Teacher Answer Key and Student Answer Sheets. You can use the calendar icon to pop-up a representation of a calendar to easily select a date.
- In the **Subject** field, enter the test subject. This will be added to the Teacher Answer Key.
- In the **Section** field, enter a class section, if necessary. This will be added to the Teacher Answer Key.

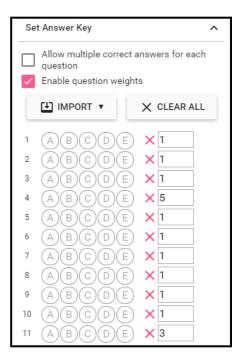
Set Answer Key

When you click on **Set Answer Key**, additional fields will appear, which will allow you to set point values to individual questions and fill in the Teacher Answer Key with the correct answers.

Weighted Questions

When certain questions have more importance than others on a test, instructors can assign weighted point values relative to the weight of their value, as shown in the following illustration:

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To assign weights to the questions, do the following:

- 1. Check the ${\bf Enable}$ question weights box.
- 2. When the weight boxes appear, all questions will be assigned a default point value of 1.
- 3. Type in point values for each question that will carry a weight higher than 1.

Weight Sheets

Weight sheets are extentions to the answer keys and are automatically generated by the Bubble Sheet Generator when weights are assigned to questions. The weight sheets assign point values to questions through the use of Point Groups. This is what will be used along with the answer key by Dispatcher Phoenix to grade the tests.

- Each point value assigned to questions on a test is assigned to a Point Group. In turn, each question using that point number will be assigned to that Point Group.
- Points are assigned to each question that corresponds with that group, labeled A F. There are seven bubbles for each weight group, and each bubble is assigned a value to add up to the correct point value. The bubble values are: A=1, B=2, C=4, D=8, E=16, F=32, and G=64. For example, if a weight group was to be assigned a value of five, bubbles A and C would be selected. (Bubble A=1 point, and bubble C=4 points, adding up to a value of 5). The largest value that can be assigned to a weight group is 100.
- The number of groups per weight sheet are limited to:
 - $\circ~$ Six groups for 150 or fewer questions.
 - Four groups for 151 or more questions.
- Additional weight sheets are created if not enough groups exist on a single weight sheet to accommodate all weight values. The bubble sheet
 generator automatically generates the number of weight sheets needed to accommodate the number of different weights entered. The
 maximum number of weight sheets for each test is 15.
- The following figure is an example of a weight sheet, with 15 questions listed and three Weight Groups used. Weight Group A has a value of 1, Weight Group B has a value of 5, and Weight Group C has a value of 3. Weight Groups D F are not used. All questions except two have a value of 1 because they are assigned to Weight Group A, which has a weight value of 1. The exceptions are Question 4, assigned to Weight Group B and carrying a weight value of 5; and Question 11, assigned to Weight Group C and carrying a weight value of 3:

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Test ID 2 2 9 6 5 6 5 6 0 8 - 0 0 0 0 0 0 0 - 0 0 0 0 0 0 - 0 0 0 0	Weight Sheet Dispatcher Phoenix Name: Exam Date: Subject:
Weight Groups A	Section: Important: Fill in each bubble carefully and completely. Completely erase any filled-in bubbles that you want to change. Make sure that Test IDs match across each page (if being verified). Weight sheets must immediately follow answer key in test packet.
1	

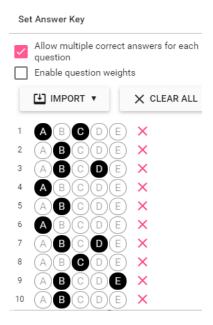
Assigning Answers

- To assign answers, click on the correct bubble letter(s) associated with that question. To clear the selection, click on the **X** button in the specific row. Once you are done making your selections, click the **Apply** button. The Answer Key in the Preview area will reflect your changes.
- Click the **Import** button to import a CSV or Excel (.xlsx) file that has a list of correct answers. The Windows file explorer pop-up window will open to select the Teacher Answer Key import file.
 - Excel Column A should contain the correct answers (single or multiple) with the heading of "Answers" in Line 1.
 - CSV The first line should have a header of "Answers" followed with the correct answer(s) in each line.
- Click the Clear All button to clear all selections made.

Multiple Answers

• When questions include more than one correct answer, check the box next to **Allow multiple correct answers for each question**. With your mouse, click on all possible correct bubbled letters associated with that question, as shown in the following illustration

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- Click the **Import** button to import a CSV or Excel (.xlsx) file that has a list of correct answers. The Windows file explorer pop-up window will open to select the Teacher Answer Key import file.
 - Excel Column A should contain the correct answers (single or multiple) with the heading of "Answers" in Line 1. Column B should contain the weight values with the heading of "Weights" in Line 1.
 - **CSV** The first line should have a header of "Answers" followed by a comma and then the header of "Answers" with no space. Each line following should contain the correct answer(s) for each question, followed by the value of the weight with no space. The following image displays a CSV file containing multiple answers and weight values:

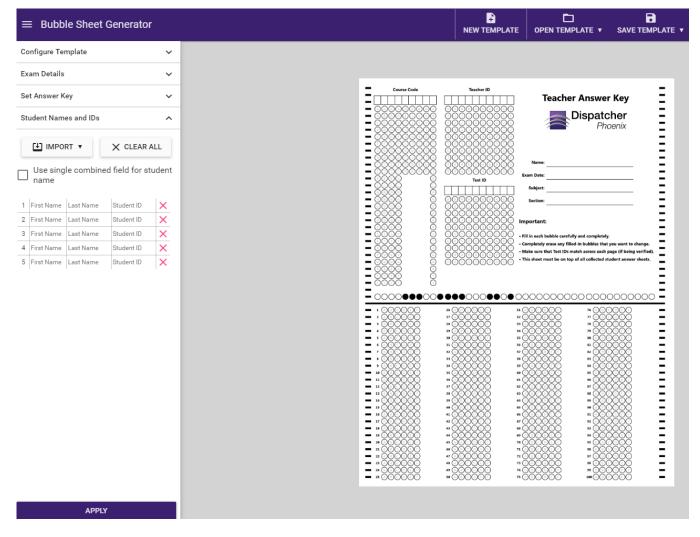
Answers,Weights
AB,1
AC,1
D,1
BC,1
C,2
BD,2
B,2
AD,2

• The CLEAR ALL button allows you to easily clear out all the bubbles you have filled in and start a fresh Student Answer Sheet.

Student Names and IDs

When you click on the down arrow next to Student Names and IDs, additional fields will appear, allowing you to customize the Student Answer Sheets with the student's first and last name as well as the student's ID, as in the following illustration:

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- Any information entered here will appear on the Student Answer Sheets only when they are printed or exported.
- Click the **Use single combined field for student name** check box to eliminate the separator between the first name and last name, affording the flexibility of providing more characters for students with long names.
 - Use a blank space to distinguish between the first name and the last name.
 - If only one name is specified with no spaces, it will be stored in the Last Name field.
- Enter the student's first name, last name, and ID for each Student Answer Sheet. To clear your information, click on the X button in a specific row, or select the Clear All button to clear out all the student information.
- The first and second fields only accept letters, the last field only accepts numeric values.
- Click the Import button to import an Excel (.xlsx) file that has a list of student names and IDs, and apply the following formatting rules:
 - First and Last Name Separated
 - First row contains "First" header in Column A, "Last" header in Column B, and "Id" header in Column C.
 - Each row following carries information for one student, containing the student's first name in Column A, the student's last name in Column B, and the student's ID in Column C.
 - First and Last Name Combined
 - First row contains "Fullname" header in Column A, and "Id" header in Column B.
 - Each row following carries information for one student, containing the student's last name, a space, and first name in Column A; and the student's ID in Column B.
- Click the Import button to import a CSV file that has a list of student names and IDs, and apply the following formatting rules:
 - · First and Last Name Separated
 - First row contains "First" header, a comma with no space, "Last" header, a comma with no space, and "Id" header.

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- Each row following carries information for one student, containing the student's first name, a comma with no space, the student's last name, a comma with no space, and the student's ID.
- · First and Last Name Combined
 - First row contains "Fullname" header, a comma with no space, and "Id" header.
 - Each row following carries information for one student, containing the student's last name, a space, the student's first name, a comma with no space, and the student's ID.
- The following image displays a CSV file containing separated student names and IDs:

First,Last,Id John,Smith,1 Helen,Reddy,2 Albert,Camus,3

• Click **Apply** to see your selections displayed in the Preview area.

APPLY

Image Processing

Deskew



Deskew

The image process node for **Deskew** corrects the angle of a scanned image when it is not lined up with the paper. Deskew works by detecting possible lines of text in an image, running either horizontally or vertically. Note that OCR is not performed during the deskew process, and heavily graphical documents may not deskew as expected.

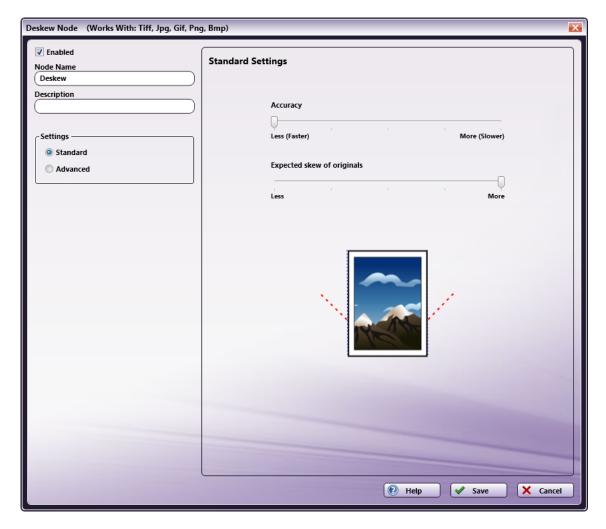
The Deskew node offers both standard and advanced settings. To open the Deskew Node window, add a process node for **Deskew** and double-click on it.

- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Deskew node.
- In the **Description** field, enter a description for the Deskew node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- Select the **Save** button to keep the Deskew definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Deskew - Standard Settings

As a default, you will see the Standard settings first.

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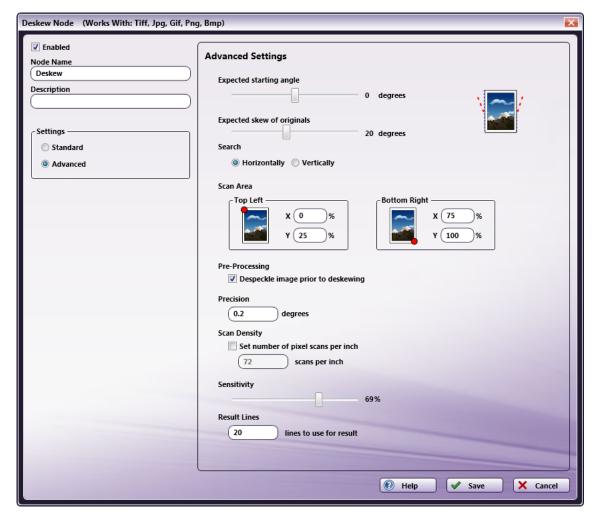


- Use the **Accuracy** sliding bar to specify whether you want accurate deskewing results (More) or faster processing time (Less).
- Use the **Expected skew of originals** sliding bar to define the range that should be used for deskewing. "More" will indicate a larger skewed angle and "Less" will indicate a smaller skewed angle. For a visual representation, the red dotted lines coming out of the thumbnail image of the right hand side will adjust accordingly.

Deskew - Advanced Settings

To customize the deskew process further, click on the **Advanced** radio button in the Settings area. This is useful if you have a variety of differently skewed documents, and need to adjust the deskew performance. The Advanced Settings view resembles the following illustration:

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- Use the Expected starting angle and Expected skew of originals sliding bars to further define the scope of deskewing.
 - Specify the degrees of the skew angle using the **Expected starting angle** sliding bar. This will be the starting point for the deskew process and will tell the application to start with the assumption that the images are approximately this many degrees rotated. The default of 0 means that there is no assumption. For a visual representation, the thumbnail image on the right hand side will rotate accordingly.
 - Specify the range for the deskewing using the **Expected skew of originals** sliding bar. For example, if you indicate 5 degrees for the Expected starting angle with an Expected skew of originals of 15, the application will correct the document up to 20 degrees. For a visual representation, the red dotted lines coming from the thumbnail image of the right hand side will adjust accordingly.
- Use the **Search Horizontally** or **Search Vertically** radio buttons to specify whether the application will look for horizontal or vertical lines during the deskew process. **Search Vertically** is useful if you have a document with vertical text or one that was scanned in as landscape. See the following illustrations for more information:

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- The **Scan Area** defines the zone (area of the page) that is used for the deskewing process. The default scan area is the center half of the page. To change this setting, enter percentage values for X and Y starting from the top left side down to the bottom right side of the document. Note that the larger scan area that is defined, the longer the deskew process will take.
- By default, images are despeckled before the deskewing process begins. Although this does not visually affect the output, it may strengthen the lines and help with edge detection during the deskew process. Uncheck the **Despeckle image prior to deskewing** box if you want to disable this option (and speed up your deskew processing time).
- Use the **Precision** field to define the increments in which the document's skew angle is checked and corrected. For example, if you enter .5, the application will correct the document's skew angle at each .5 degrees. Note that the smaller the increment chosen for accuracy, the longer the image file will take to deskew.
- As another performance modification, you can change the **Scan Density** setting. The default setting is to downscale the image to 72 dpi. You can increase the maximum dpi to improve accuracy; however, the deskew processing time will be slower.
- The **Sensitivity** sliding bar controls the level of contrast that will be used to detect lines during the deskew process. A lower sensitivity value will pick up more lines than a higher value.

Despeckle



Despeckle

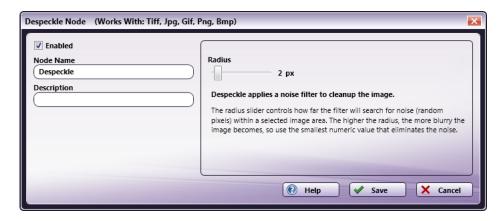
Sometimes a scanned photograph might pick up dust or smudges from the scanning surface. The *Despeckle* process removes any stray spots on the scanned image. When this operation is chosen, "noise" spots on the image are removed by applying a filter that blurs or blends the pixels within a selection to achieve a balance between sharpening the image and hiding the defects.

Notes:

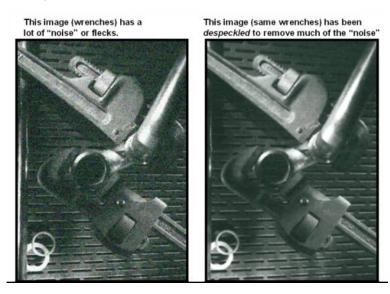
- Despeckling is recommended primarily for analog images, such as scanned photographs. Due to significantly sharper contrast lines, despeckling is not recommended for digital images.
- Be aware that despeckling can have adverse effects on text legibility, whether analog or digital. For best results, it is recommended that you test the effects of your settings on a representative sample document prior to putting the despeckle process into full use.
- Despeckling does not work with images that have transparent pixels.

To open the **Despeckle Node** window, add a process node for **Despeckle** and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Despeckle node.
- In the **Description** field, enter a description for the Despeckle node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- Using the **Radius** slide bar, specify how far the filter will search for noise within a selected image area. Most images clean up nicely using a Radius of 1 or 2, without distorting the picture. The following example shows two pictures of wrenches, with the second sample having been despeckled:



• Select the **Save** button to keep the Despeckle definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Mirror Image

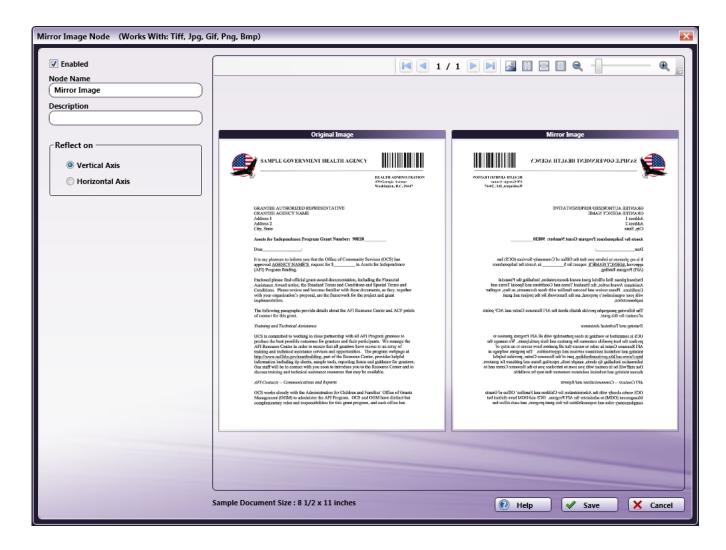


The Mirror Image process is an optional node that flips the image across an invisible axis that you specify (either horizontal or vertical). The node includes a preview area to help you visualize your mirroring results. This node works with TIFF, JPG, GIF, PNG, and BMP files.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the Mirror Image Node window, add a process node for Mirror Image and double-click on it.

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- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Mirror Image node.
- In the **Description** field, enter a description for the Mirror Image node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Reflect on** area, select the axis across which you want the object to be reflected. Choices are:
 - $\circ~$ Vertical Axis - The left and right parts of the image are interchanged.
 - $\circ~$ Horizontal The image is turned upside down.

The preview area will reflect an example of the mirror process that you have chosen.

• Select the **Save** button to keep your Mirror Image definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Using The Tool Bar

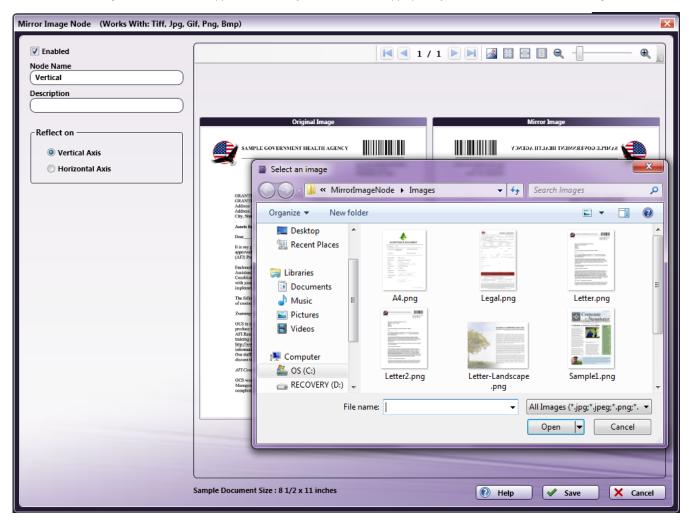
Use the tool bar to manipulate or change the Preview area.

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lcon	Description
M 1/2 F M	Pages icons. Click on the arrows to navigate through multiple pages of the sample document (if available).
	Sample Document icon. Click on this icon to find and upload another sample document to use in the Preview area.
	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon to fit the sample document completely in the Preview area.
e, —]—— e,	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area. You can zoom to the location of the mouse cursor by using Ctrl + Mouse Wheel. You can also pan around the document by using Ctrl + Space + Mouse Left Button Click

Uploading Another Sample Document

Clicking on the **Upload** icon on the tool bar allows you to upload your own sample document to use as a preview when defining your mirror image process. In addition, the application provides you with five sample documents of various sizes that you can also use. When you click on the **Upload** icon, a "Select an image" browse folder will appear from which you can choose the appropriately sized document, as in the following illustration:



Negative Image



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The Negative Image process is an optional node that creates a negative of an incoming document (i.e., converts light area to dark and vice versa). The node includes a preview area to help you visualize your processing results. This node works with TIFF, JPG, GIF, PNG, and BMP files.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the Negative Image Node window, add a process node for **Negative Image** and double-click on it. The preview area will reflect the results of the conversion process.



- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Negative Image node.
- In the **Description** field, enter a description for the Negative Image node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Select the **Save** button to keep your Negative Image definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Using The Tool Bar

Use the tool bar to manipulate or change the Preview area.

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lcon	Description
M 1 / 2 F M	Pages icons. Click on the arrows to navigate through multiple pages of the sample document (if available).
<u>~</u>	Sample Document icon. Click on this icon to find and upload another sample document to use in the Preview area.
	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
=	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon to fit the sample document completely in the Preview area.
Q — Q	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area. You can zoom to the location of the mouse cursor by using Ctrl + Mouse Wheel. You can also pan around the document by using Ctrl + Space + Mouse Left Button Click.

Uploading Another Sample Document

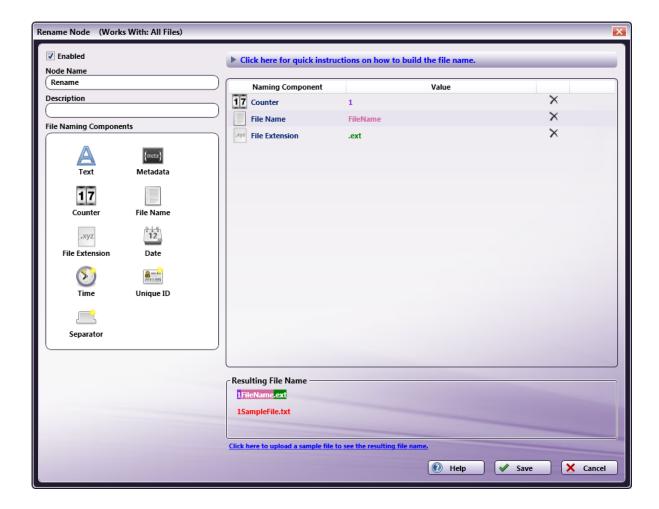
Clicking on the **Upload** icon on the tool bar allows you to upload your own sample document to use as a preview when defining your mirror image process. In addition, the application provides you with five sample documents of various sizes that you can also use. When you click on the **Upload** icon, a "Select an image" browse folder will appear from which you can choose the appropriately sized document.

Rename



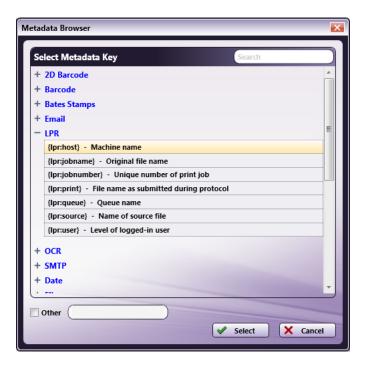
The Rename process will change the file name to whatever you define it to be in the *Rename Node* window. To open the Rename Node window, add a process node for *Rename* and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Rename node.
- In the **Description** field, enter a description for the Rename node. Although this is not required, it can be helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **File Naming Components area**, you can customize the following components to rename your files. Note that the length of the file name cannot exceed 255 characters (a Windows limit).
 - **Text**: Drag-and-drop this icon into the Naming Components area; then double-click on it to enter any text string you want included in the new file name. With this component, you can also use file level dynamic variables. For example, type {file:fullname} to include the file's entire file name in the rename process.
 - **Metadata** Double-click on the Metadata naming component and then click on the **Select Metadata Key** button to launch the Metadata Browser window, which displays system-defined variables and metadata from other nodes that are used in the workflow. If you have not added any other nodes, only system-defined variables (Date, File, System, User) will appear in the window. On the Metadata Browser, you can do the following:
 - Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you are interested in LPR metadata, click on the + sign next to LPR and the following expandable list will appear:

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- Collapse the list by clicking on the sign next to the appropriate metadata.
- Choose metadata to add to the new name by clicking on the metadata and clicking on the Select button. At this point, the Metadata Browser will close and you will return to the Rename window.
- Specify a page-level and/or occurrence number for the metadata reference by clicking on the Other check box and entering the
 correct syntax in the empty field provided.
- Search for metadata by entering the appropriate text string in the empty Search field on the left-hand side of the window.
- **Counter**: Drag-and-drop this icon into the Naming Components area to add a sequential counter to the new file name; then double-click on it to customize the counter (defining the start number, the maximum value, the number by which the counter should be incremented, and whether or not to use leading numbers). The maximum value for incrementing is 4 billion.

Note: In order to maintain count integrity, once the workflow is run for the first time, the counter will no longer be editable.

- **Date**: Drag-and-drop this icon into the Naming Components area to include the process date in the new file name; then double-click on it to choose the date format (MM-DD-YYYY, MM, dd, or yyyy).
- **Time**: Drag-and-drop this icon into the Naming Components area to include the time in the new file name; then double-click on it to choose the time format (HH-mm-ss. HH, mm. or ss).
- **Separator**: Drag-and-drop this icon into the Naming Components area to include a separator in the new file name; then double-click on it to view a list of available separators.

In addition, the following components can be added to the new file name but not modified:

- File Name: Drag-and-drop this icon into the Naming Components area to include the original file name in the new file name.
- **Unique ID**: Drag-and-drop this icon into the Naming Components area to include a unique identifier to the new file name (if not selected, files with the same name will be merged into a single file).
- File Extension: Drag-and-drop this icon into the Naming Components area to include the original file extension in the new file name.

Note: It is necessary to include the 'File Extension' option to the Rename Process if the output files are to be viewed.

- In the Resulting File Name area, view the file name that you have created during the Rename process.
- To view the results of the Rename process on a sample file, select the Click here to upload a sample file to see the resulting file name link
 on the bottom of the Preview area.
- To delete already defined naming components, click on the **Delete** icon (**X**) next to the component you would like to remove.
- Select the Save button to keep the Rename definition. You can also select the Help button to access online help and select the Cancel button to exit the window without saving any changes.

Watermark

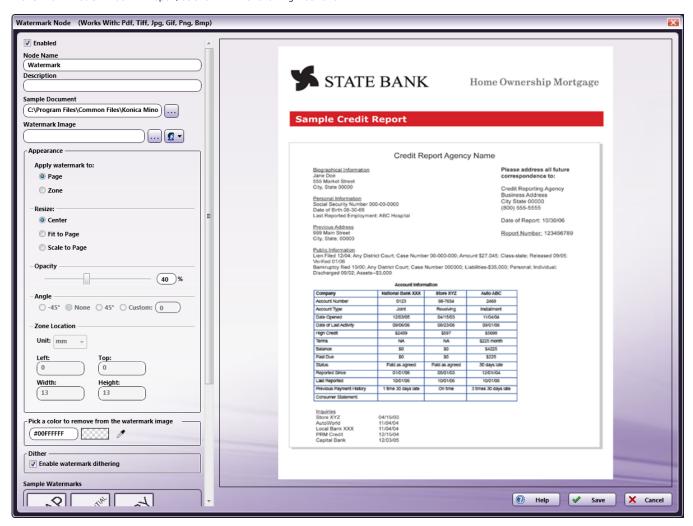
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The **Watermark Node** applies a watermark to an image file. Acceptable file types for the **Watermark Node** include: PDF, TIFF, JPG, GIF, PNG, and BMP. Note that the **Watermark Node** does not support AES (Advanced Encryption Standard) PDFs.

Note: When building a workflow with other OCR process nodes (e.g., Convert to PDF, Redact, etc.) the Watermark Node must be the last process node in the workflow.

To open the **Watermark Node** window, add a process node for **Watermark** to the Workflow Builder canvas, then double-click on the node. The **Watermark Node** window will open, as shown in the following illustration:



- To enable the node, check the **Enabled** box. When this box is unchecked, this process node will be ignored and documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter an alternative name for the **Watermark Node**. Although this is not required, it can be helpful if you have multiple **Watermark Nodes** in a workflow.
- In the **Description** field, enter a description for the **Watermark Node**. Although this is not required, it can be helpful in reminding you which process is active in the workflow. If the length of the description exceeds the amount of space in the field, you can hover the mouse over the field to read the entire description.
- In the **Sample Document** field, specify a different sample document to use to preview the results of your watermark process. Note that even if you upload a sample document, the display may not match the actual results exactly. For a true result, you must run the workflow. Note that PDFs cannot be used as sample documents.
- In the **Watermark Image** field, specify a different watermark image to use in the watermark process. Several **Sample Watermarks** are included in PNG format and can be used for the watermark process. Click on the **Sample Watermark** that you want to use under **Sample**

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Watermarks, or click on the ellipsis button (...) to browse and use one of your own images. If you choose to use one of the many common watermarks included with this node, they all have transparent backgrounds and will output the same image shown in the preview (as shown in the above illustration). When using a watermark image that resides on a network directory, you will need to enter network credentials. Select the Network Credentials button to the right of the ellipsis button to access the Network Credentials window; on this window, you can select your username and enter the appropriate password.

- In the **Appearance** area you can select various options to modify the appearance of the watermark.
 - Apply watermark to:
 - Page Select this radio button to apply the watermark to the entire page.
 - Zone Select this radio button to apply the watermark within a zone on the page. With this option, you can move, resize, and rotate the zone.

Note: You can use the keyboard arrow keys to move the zone around the preview of the document. Holding down the Shift key or the Ctrl key at the same time allows for faster movement.

- Resize Select a radio button to determine how the watermark image will resize on the page:
 - Center Center the watermark image to the input document. Note that the watermark image will take on the DPI of the input document and this may change its apparent height and width. For example, if a 300x300 pixel watermark is applied to a 400 dpi image, the watermark will appear to be 3/4" x 3/4".
 - **Fit to Page/Zone** Resize both the height and width of the image until the entire page is covered. Note that this will not resize the image proportionally and the resulting image could look distorted.
 - Scale to Page/Zone Resize the height and width of the image proportionally as large as the page can hold without distorting the
 aspect ratio of the image.
- Opacity Use the slider bar or enter a value in the percentage field to set the opacity level for the watermark.
- Angle Select a radio button to modify the angle of the watermark. You can also enter a custom angle by selecting the Custom radio button and entering a value in the Custom field. The Angle option is only available if you have selected Apply watermark to zone.
- Zone Location Select a unit of measurement (millimeters, inches, or points), then enter values in the fields below. Left and Top refer to
 the distance from the left and top of the page, respectively. Width and Height refer to the size of the watermark zone. The Zone Location
 option is only available if you have selected Apply watermark to zone.
- Pick a color to remove from the watermark image Enter the color code of a color you do not want included on the watermark. You can also use the eye dropper to mark any color you do not want included on the watermark.
- Dither Check the Enable watermark dithering box to speckle the watermark image overlay. This is useful for improving transparency when watermarking black & white or limited-index color format images.
- Sample Watermarks Various common watermarks are available to use on your document.

Note: You can use Ctrl + mouse wheel to zoom in/out on the preview of the document.

• Select the **Save** button to keep the Watermark definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Note: Special considerations should be taken when watermarking black and white TIFF images. This is due to the very limited color depth (black or white pixels only) of the image. As a result, it is recommended that the watermark brightness be set to 100% and that the watermark image be transparent, or to select a background color. This will result in an opaque stamp of the watermark over the black and white source document.

Metadata

HL7 Parser



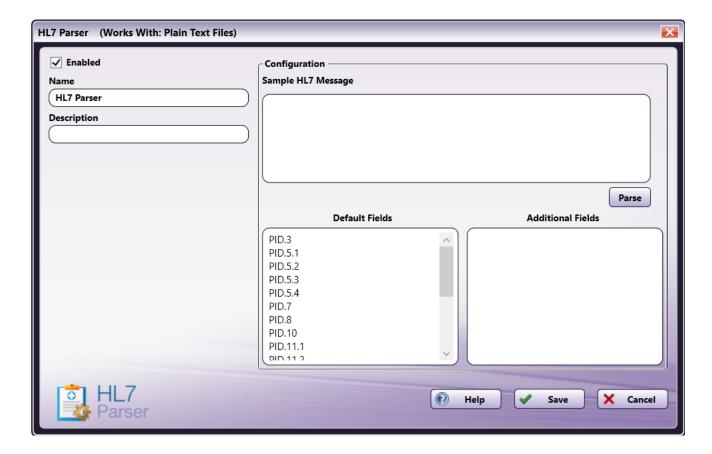
HL7 (Health Level 7) is a standard of communication across the Healthcare market. The **HL7 Parser** allows Dispatcher Phoenix customers to parse HL7 messages into document metadata for use within Dispatcher Phoenix and extracts documents imbedded within HL7 messages. For more information about HL7 messages, see the Overview of HL7 or visit https://hl7-definition.caristix.com/v2/HL7v2.8/Segments/.

Important! The **HL7 Parser** node is configured to best parse **HL7 v2.8** messages, but is capable of parsing any **HL7 v2.x** messages. When parsing older versions of HL7 v2.x, parsed data may not appear as expected, including data being parsed with slightly different segment names, parsed in separate or combined subsegments, etc. For more information about parsing older versions of HL7 v2.x, contact Dispatcher Phoenix Engineering Services

Configuring the HL7 Parser

To open the HL7 Parser node's properties window, add the Process node called "HL7 Parser" to your workflow and double-click on it.

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- **Enabled** To enable this node in the current workflow, ensure the **Enabled** checkbox is clicked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it, and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

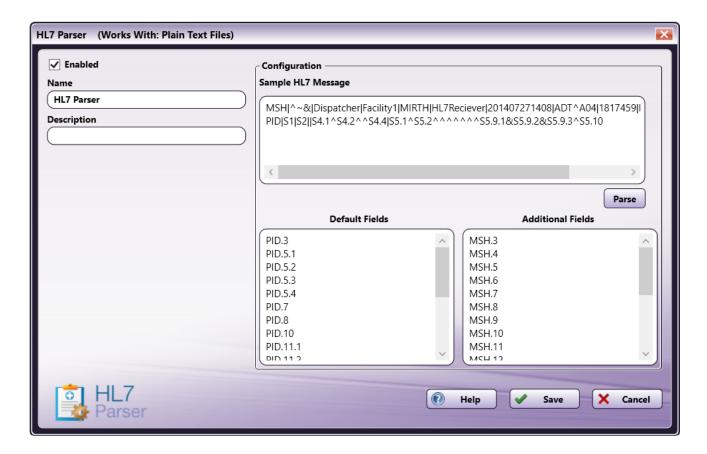
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node definition and exit the window, click this button.

Sample HL7 Message

The **HL7 Parser** node allows you to input a sample HL7 message to determine which HL7 message segments are typically used by your organization. To parse a sample message, do the following:

- 1. Enter or paste a copied HL7 message into the Sample HL7 Message field.
- 2. Select the "Parse" button.
- 3. The **HL7 Parser** node will then separate all HL7 message segments and subsegments and compare them to the Default Fields. Any Additional Fields will automatically populate in the **Additional Fields** area, as in the following illustration:

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Important! To maintain security and compliance, the **Sample HL7 Message** section automatically deletes any information in that area after the node is closed. This information in this section is not saved in any way, even if you select the **Save** button.

Notes:

- The HL7 Parser will not parse any HL7 messages that do not contain the MSH segment at the beginning of the message.
- When using the **Sample HL7 Message** parser to add segments to the **Additional Fields** area, the node will always add to the segments already defined. It will not delete existing entries.

Default Fields

The **HL7 Parser** is configured to automatically parse several Default Fields of the HL7 message, which represent the most commonly-used segments of typical HL7 messages. These are listed in the bottom left-hand box and include:

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ID	Description of Patient Information
PID.3	Patient identifier list
PID.5.1	Family name
PID.5.2	Given name
PID.5.3	Second and further given names or initials thereof
PID.5.4	Suffix
PID.7	Date and time of birth
PID.8	Administrative Sex
PID.10	Race
PID.11.1	Street address
PID.11.2	Other designation
PID.11.3	City
PID.11.4	State or province
PID.11.5	Zip or postal code
PID.11.6	Country
PID.13	Phone number - Home
PID.15	Primary language
PID.17	Religion
PID.19	SSN - Patient
PID.22	Ethnic group

Additional Fields

Additional Fields of the HL7 message can be added to the node configuration, by either using the **Sample HL7 Message** parsing feature described above or by typing them manually into the bottom right-hand box, labeled **Additional Fields**. Note that any Additional Fields can either be entered separated by a space or on their own line for the workflow to pass validation. Note that segments separated by a space will be placed on their own line after the node is saved.

For a segment with subsegments, the user has the ability to enter the top-level segment without specifying which subsegments to parse. In this case, the metadata generated will include **ALL** the data contained in each subsegment. For example, the user could enter "ABS.1" in the Additional Fields area. The metadata for "ABS.1" would include any values detected for "ABS.1.1" through "ABS.1.25", including any further subsegments, such as "ABS.1.23.1" through "ABS.1.23.22".

Notes:

- The HL7 Parser does not perform any data validation on parsed data. For example, "PID.7" refers to the patient date of birth. In the HL7 message, a birthdate of January 15, 2087 is written as "19870115". If the metadata needs to be converted to a different format, a Metadata Scripting node or similar can be used in the workflow.
- If the **HL7 Parser** is configured to parse information from an HL7 segment that does not have any data, the node will create metadata with a null value.

Important! HL7 segments must be in the format of XXX.#.#. Other formats, such as XXX-#.# will produce an error.

Extracting Documents from HL7 Messages

The **HL7 Parser** is capable of extracting imbedded documents from the HL7 message. These documents typically are located in the OBX.5 segment. The node will not parse the OBX.5 segment into metadata, but will instead take the information contained in this segment and create a document based on that information, which can be used later in the workflow. The type of document is determined by the data contained in the OBX.2 and OBX.5 segments.

Note: Because the **HL7 Parser** converts the OBX.5 segment into a document, it cannot be used for metadata. If the OBX.5 segment is added to the **Additional Fields** area, the node will not pass validation and the workflow will produce an error and not run.

Overview of HL7

HL7 is an international standard for transferring medical data between disparate healthcare systems. An HL7 message is comprised of one-character delimiters that separate the individual parts of the message.

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Delimiters:	
0x0D	Marks the end of each segment
^	Sub-composite delimiter
&	Sub-sub-composite delimiter
-	Separates repeating fields
١	Escape character

Sample HL7 Message

Below is an example of a an HL7 message:

 $\label{local-matrix} $$MSH|^-&\|Dispatcher|Facility1\|MIRTH\|HL7Reciever\|201407271408\|ADT^A04\|1817459\|D\|2.8\|123456\|ALPID\|S1\|S2\|S4.1^S4.2^S5.4.4\|S5.1^S5.2^A^A^AS5.9.1\&S5.9.2\&S5.9.3^S5.10$$

In this message, the **HL7 Parser** will extract the following information:

- PID.1 will produce a metadata value of "S1"
- PID.4 will produce a metadata value of "S4.1^S4.2^^S4.4"
- PID.4.2 will produce a metadata value of "S4.2"
- PID.5 will produce a metadata value of "S5.1^S5.2^^^^^S5.9.1&S5.9.2&S5.9.3^S5.10"
- PID.5.9 will produce a metadata value of "S5.9.1&S5.9.2&S5.9.3"
- PID.5.9.3 will produce a metadata value of "S5.9.3"

Metadata Browsing

Specifying Metadata Value from Metadata Browser

You can choose to use any metadata associated with documents in the workflow. When you click on the **Metadata** button within a node configuration window, the Metadata Browser will appear, listing all of the metadata available, categorized by metadata type as shown in the following illustration:

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On the Metadata Browser, you can do the following:

- 1. **Expand the list** by clicking on the + sign next to the metadata that you are interested in. For example, if you would like Date, click on the + sign next to Date and the expandable list in the above illustration will appear.
- 2. From the Metadata Browser, you can drag-drop metadata keys into the **Metadata Value** field.
- 3. Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.

Metadata for Dispatcher Phoenix and Dispatcher Stratus

Metadata keys generated in Dispatcher Phoenix and collected by Dispatcher Stratus must be manually edited for use in Dispatcher Stratus workflows. Metadata keys flowing from Dispatcher Stratus do not need to be modified in Dispatcher Phoenix.

Note: At this time, only file-level and page-level metadata is passed between Dispatcher Stratus and Dispatcher Phoenix.

When sharing metadata between Dispatcher Phoenix and Dispatcher Stratus, metadata keys generated by one system will not be available for selection in the other system's Metadata Browser or Metadata to File node. For example, when added to a Phoenix workflow, the Metadata to File node will list all metadata groups in the workflow (such as the OCR metadata group) except Stratus' Send to Dispatcher Phoenix and Collect from Dispatcher Phoenix nodes. However, in either situation, you can manually select the metadata groups.

Metadata keys generated in Dispatcher Phoenix and collected by Dispatcher Stratus must be manually edited in Dispatcher Stratus for use in workflows. Conversely, metadata keys flowing from Dispatcher Stratus do not need to be modified in Dispatcher Phoenix.

For any metadata keys collected from Dispatcher Phoenix, make the following adjustments before using them in a Stratus workflow:

- Prefix any metadata keys in the Stratus workflow with "file:".
- · Replace any colons in the metadata key with a period.

For example, assume the Dispatcher Phoenix workflow includes the Input Folder node. The Dispatcher Phoenix workflow will generate the metadata key {input:total} that represents the total number of collected files. In order to access that data in the Stratus workflow, you must modify the metadata key to {file:input.total}.

For page-level metadata, such as that generated by Forms Processing or Advanced OCR, you must encase some parts of the metadata key in square brackets and quotes. For example, if the Dispatcher Phoenix workflow includes an Advanced OCR node that includes a zone called ProjectName, then the Dispatcher Phoenix workflow will add a metadata key {ocr:zone.ProjectName}. Accessing it by page number in Dispatcher Phoenix involves adding

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the page number minus 1 to the key, {ocr:zone.ProjectName[0]} for page 1. To access the metadata in Stratus, modify the metadata key as such: {file:ocr["zone.ProjectName"][0].value}.

For metadata keys generated by Dispatcher Phoenix that contain periods, colons, and/or underscores in it's second half, you must encase the second part of the key in square brackets and quotes. For example, for an index form set up in Dispatcher Phoenix with a field that has a variable name "document_name", Dispatcher Phoenix will generate a metadata key {form:document_name}. Modify the corresponding metadata key in Stratus to: {file:form["document_name"]}.

Notes:

- In both Dispatcher Phoenix and Dispatcher Stratus, anything that gives the user friendly options to select known metadata keys will NOT show metadata generated by the other system.
- When sharing metadata between Dispatcher Phoenix and Dispatcher Stratus, metadata generated by one system will not display in the other system's:
 - Metadata to File node To use the generated data in your workflow, select "Custom" at the Metadata File Format field, then create a
 custom Lua script to export the metadata.
 - Metadata Browser To use the generated data in your workflow, manually enter the metadata key directly into the field you want to use it in. For example, in the Output Folder node, include the metadata key in your output path.
 - For example, when added to a Phoenix workflow, the Metadata to File node will list all metadata groups in the workflow (for example, the OCR metadata group) with the exception of the following Stratus nodes:
 - Dispatcher Stratus In
 - Collect from Dispatcher Phoenix

Metadata Route



The **Metadata Route Node** routes documents according to metadata-based search rules defined by the user. With this process, you can create routing conditions using any metadata that is associated with documents in the workflow. For example, if a Barcode Processing node has been added to the workflow, you can search for any barcode zones that were defined. Similarly, if an Advanced Bates Stamp node was included in the workflow, you can search for a specific Bates stamp that was defined. You can also search for any system defined variable. Once rules have been set up, the node routes documents based on whether or not they meet the conditions that you have specified.

This node can have the following outbound connectors:

- Yes If the metadata condition has been met.
- No If the metadata condition has not been met.
- Error If the document type is not supported.

To open the **Metadata Route Node** window, add a process node for **Metadata Route** to the Workflow Builder canvas,; then double-click on the node. The **Metadata Route Node** window will open, as shown in the following illustration:

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Using the Metadata Route Node Window

- Check the **Enabled** box so that the process will be run. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Metadata Route node.
- In the **Description** field, enter a description for the Metadata Route node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Select the **Save** button to keep your Metadata Route definition. Select the **Help** button to access online help. Select the **Cancel** button to exit the window without saving any changes.

Setting Up Metadata Rules



To set up a metadata rule, do the following:

Step 1: Selecting Metadata

You can choose to use any metadata associated with documents in the workflow. When you click on the **Select Metadata Key** button, the Metadata Browser will appear, listing all of the metadata available, categorized by metadata type. For example, if you have created a zone in an Advanced OCR node, that zone would be listed in the pop-up window, under the OCR heading. In addition, you can choose system-defined variables to use as conditions on this window. Note that no metadata key will appear unless you have set up a metadata key in another process node in the workflow. On the Metadata Browser, you can do the following:

• Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you are interested in LPR metadata, click on the + sign next to LPR and the following expandable list will appear:

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- Collapse the list by clicking on the sign next to the appropriate metadata.
- Choose metadata to add to the rule by clicking on the metadata and clicking on the Select button. At this point, the Metadata Browser will close and you will return to the Metadata Route window.
- Specify a page-level and/or occurrence number for the metadata reference by checking the Custom Metadata box and entering the correct syntax in the empty field provided.
- Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.

Step 2: Specifying Conditions

Next, do the following:

• Specify a **Condition** from the dropdown. Options are:

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Condition	Description	Allows Match Case	Requires Metadata Value
Is	The Metadata Key matches the Metadata Value exactly.	Yes	Yes
Contains	The Metadata Key contains the Metadata Value anywhere.	Yes	Yes
Is Less Than	The value of the Metadata Key is lower than the value entered in the Metadata Value .	No	Yes
Is Less Than or Equal To	The value of the Metadata Key is lower than or is the same as the value entered in the Metadata Value .	No	Yes
Is Greater Than	The value of the Metadata Key is higher than the value entered in the Metadata Value .	No	Yes
Is Greater Than or Equal To	The value of the Metadata Key is higher than or is the same as the value entered in the Metadata Value .	No	Yes
Is Between	The value of the Metadata Key is between the values entered in the two Metadata Value areas. The order of the two entries does not matter.	No	Yes
Is Equal to Or Between	The value of the Metadata Key is the same as either value or is between the values entered in the two Metadata Value areas. The order of the two entries does not matter.	No	Yes
Regular Expression	The value of the Metadata Key fits within the parameters described by the expression or selected pattern.	Yes	Yes
Exists	There is a Metadata Key for the file.	No	No
Has Value	The metadata extracted from the Metadata Key contains any value.	No	No

- Check the **Not** checkbox to search for the opposite of the selected **Condition**.
- Check the Match Case checkbox to search for the exact case of the Metadata Value entered.
- Add more conditions using the + icon, or click on the X icon to delete a condition.

In the following illustration, a rule has been set up to direct all documents that have an invoice number containing "195" to a certain folder:



In the following illustration, a rule has been set up to direct all documents that have an invoice number NOT containing "195" to a certain folder:



Note:

- The **Metadata Route** node rounds numbers at 16 digits when using numerical comparisons, which can impact document routing in certain circumstances.
 - For example, 21.00000000000001 (17 significant digits) will round to 21.0000000000000 (16 significant digits) and 21.00000000000000 (17 significant digits) will round to 21.0000000000001 (16 significant digits).

Step 3: Specifying Metadata Value from Metadata Browser

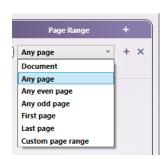
You can choose to use any metadata associated with documents in the workflow. When you click on the **Metadata** button, the Metadata Browser will appear, listing all of the metadata available, categorized by metadata type. On the Metadata Browser, you can do the following:

• Expand the list by clicking on the + sign next to the metadata that you are interested in. For example, if you would like Date, click on the + sign next to Date and the following expandable list will appear:

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- Search for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.
- Drag-drop metadata keys from the Metadata Browser window to the **Metadata Value** field.
- Specify a page-level and/or occurrence number for the metadata reference by entering the correct syntax in the Metadata Value field.



Using Pattern Matching with Regular Expression Condition

If you choose the Regular Expression condition, you can use the Pattern Matching Tool to define your regular expression.

Do the following:

1. Choose **Regular Expression** as a **Condition**. A Browse Patterns button will appear next to the Metadata Value field, as in the following illustration:

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- 2. Click on the **Browse Patterns** button to open the Pattern Matching Tool.
- 3. Use the Pattern Matching Tool to select or create a pattern; then select the **Save** button. The Pattern Matching Tool will close.
- 4. In the Metadata Value field, you will see the regular expression for the Pattern that you chose, as in the following illustration:



Step 4: Specifying Page Ranges For Processing

The Page Range Process area allows you to specify the range for the metadata rule. Options include:

- Document Metadata associated with the file.
- Any page Metadata associated with any page within the file.
- Any even page Metadata associated with any even pages within the file.
- Any odd page Metadata associated with any odd pages within the file.
- First page Metadata associated with the first page of the file.
- Last page Metadata associated with the last page of the file.
- **Define your own page range** Apply rule to a custom page range. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to specify pages 1, 2, 5, 6, and 7.
 - Specify a specific stamping sequence within a range of pages by using parentheses. For example, enter 1-10(3) to specify every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to specify pages 15-20 of a 20-page document.

Other examples include:

To specify pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).

To specify pages 10-15 of a 20-page document, enter: 10-end(-5).

To specify every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).

To specify pages 15-20 of a 25-page document, enter: end(-10)-end(-5).

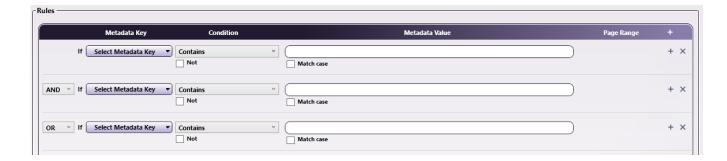
To specify pages 10-20 of a 20-page document, enter: end(-10)-end.

Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., processing pages 10-20 for a three-page document), then the file will go out on error.

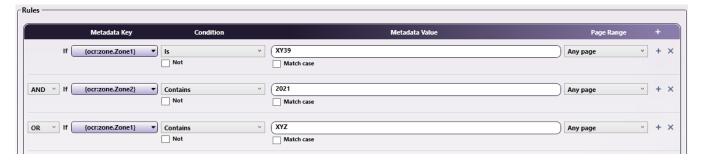
Setting Up Multiple Rules

The **Metadata Route** node supports multiple rules. When using multiple rules, they can be combined by selecting the **AND** and/or **OR** from the dropdown, as in the following illustration:

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Note: When using multiple rules, the node processes **AND** rules before processing **OR** rules. Any rule with **AND** selected will combine with the row above to form a single validation event. For example, in the following illustration, the node will check to see if the metadata for zone 1 is "XY39" and if the metadata for zone 2 contains "2021". If both are true, the document will be routed along the "Yes" workflow. If either of those conditions is not true, the node will check to see if the metadata for zone 1 contains "XYZ". If it does, the document will be routed along the "Yes" workflow. If either of the **AND** rules and the **OR** rule is false, the document will be routed along the "No" workflow.



Metadata Scripting



The Metadata Scripting node is an advanced process used to manage metadata associated with files in the workflow. With this node, you can modify, copy, delete, or add new metadata. For example, this node could be used to remove trailing spaces from metadata.

To open the Metadata Scripting window, add a process node for Metadata Scripting and double-click on it.

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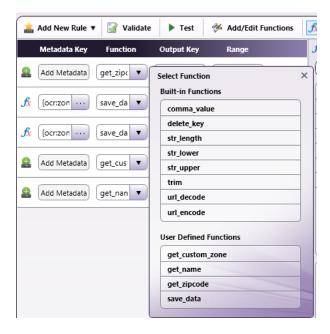
- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Metadata Scripting node.
- In the **Description** field, enter a description for the Metadata Scripting node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Check the **Enable verbose logging for rules** box to include more verbose logging messages in the Activity Log for debugging scripts.
- Select the Save button to keep your Metadata Scripting definition. You can also select the Help button to access online help and select the
 Cancel button to exit the window without saving any changes.

Creating Rules

To get started, you must build your metadata rule on the Metadata Rule Builder area of the Metadata Scripting node window. Do the following:

- 1. Add New Rule Select the Add New Rule button on the tool bar; then select the rule type from the drop-down palette that appears. The options are:
 - Modify Metadata This option is used to modify existing metadata.
 - Copy Metadata This option is used to copy existing metadata to a new metadata key.
 - Add Metadata This option is used to create new metadata. The value returned will be assigned to the new metadata key that is defined in the Output Key field.
 - Delete Metadata This option is used to delete the metadata key.
 - Call Function This option is used to perform a function on existing metadata and store the value for use in other function calls.
- 2. **Define Function** Once you've added a rule option, you can specify a function for the metadata under the **Function** column. You can use predefined functions that are listed in the Function Reference area on the right-hand side of the window or define your own function. Click the arrow next to the field to open up the Select Function palette, which displays the functions that are available for you to choose from, as in the following illustration:

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To create your own function, select the Add/Edit Functions button on the top tool bar to open the Lua Script Editor.

Note: The Delete Metadata option does not require a Function defined for it.

- 3. **Specify an Output Key** Under the **Output Key** column, define a new metadata key for the value that will be returned from the function. The Output Key can contain any group name (e.g., {myGroup:custom_zone}).
- 4. Specify a Range Under the Range column, define a page and occurrence range for the metadata rule.

For **Pages**, your options are:

- · Document Process metadata found in entire document
- $\circ\;$ All Pages Process metadata found on every page.
- All Even Pages Process metadata found on all even pages.
- All Odd Pages Process metadata found on all odd pages.
- First Page Process metadata found on the first page only.
- Last Page Process metadata found on the last page only.
- Custom Range Process metadata in custom page range. Once you choose this option, an empty field will appear to enter the page range.
 Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to process pages 1, 2, 5, 6, and 7.
 - Specify a specific processing sequence within a range of pages by using parentheses. For example, enter 1-10(3) to process every third page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to process pages 15-20 of a 20-page document.

Other examples include:

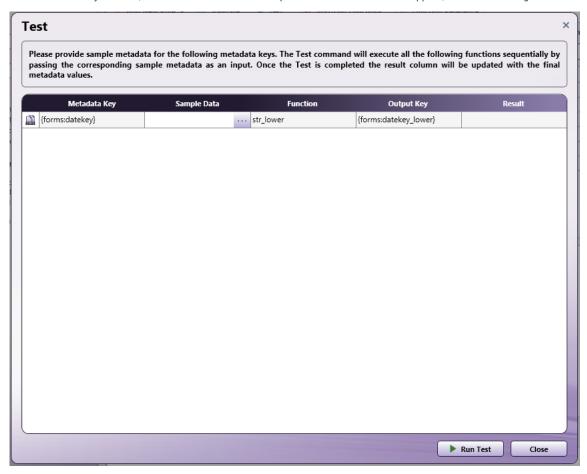
- To process pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).
- To process pages 10-15 of a 20-page document, enter: 10-end(-5).
- To process every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).
- To process pages 15-20 of a 25-page document, enter: end(-10)-end(-5).
- To process pages 10-20 of a 20-page document, enter: end(-10)-end.

For **Occurrences**, your options are:

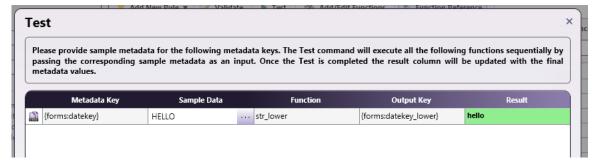
- All Occurrences Process all occurrences of metadata found.
- All Even Occurrences Process all even occurrences of metadata found on the page.
- $\circ~$ All Odd Occurrences Process all odd occurrences of metadata found on the page.
- $\circ~$ First Occurrence Process the first occurrence of metadata found found on the page.

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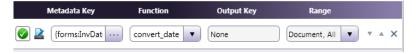
- Last Occurrence Process the last occurrence of metadata found on the page.
- Custom Range Process custom occurrence number for metadata found on the page. Once you choose this option, an empty field will appear to enter the page range. You can specify an occurrence range by using commas and/or dash signs counting from the start of the document. For example, enter 1-2 to process metadata occurrences 1 and 2.
- 5. **Validate** Once you are finished creating your rule, you can validate it by clicking the **Validate** button on the top tool bar. If the rule(s) do not validate successfully, error messages will display in red at the bottom of the screen.
- 6. **Test** To test your rules, click the **Test** button on the top tool bar. A Test window will appear, as in the following illustration:



• To run a test on the metadata rule, enter test data in the Sample Data column; then select the **Run Test** button. The results of your rule will be displayed in green under the Result column, as in the following illustration:



• Once you run a test on a rule, a **Show/Hide Test Result** icon will appear next to the rule listed in the Metadata Build Area of the node window, as in the following illustration:



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If you click on that icon, the results of the test will appear, as in the following illustration. To hide these results, either click on the **Show/Hide Test Result** icon again or click on the **X** in the green box.



Adding/Editing Functions

To create or edit unique LUA functions to suit your own business purposes, you can use the built-in Lua Script Text Editor, which is accessible by clicking on the **Add/Edit Functions** button on the top tool bar. The script editor supports full syntax highlighting for LUA scripting. It also provides the built-in function reference library that you can use to copy or insert into the text editor.

See the following illustration for an example:

```
Add/Edit Functions
                                                                                                                                                           ×
   1 -- [[ remove comma from numner values ]]
   3 function strip_comma(amount)
      local formatted = amount
        formatted, k = string.gsub(formatted, "^(-?%d+),(%d%d%d)", '%1%2')
        if (k==0) then
        break
end
      return formatted
  14 --[[ convert date from mm/dd/yy to yyyy-mm-dd ]]
  16 function convert_date(date_str)
      local formatted = date_str
      _, _, mm, dd, yy = string.find(string.lower(formatted), "^(-?%d+)/(-?%d+)/(-?%d+)")
     if (string.len(mm)<2) then
    mm = "0"..mm</pre>
      if (string.len(dd)<2) then
      if (string.len(yy)<2) then
      yy = "0"..yy
end
      if (string.len(yy)<4) then
        if (tonumber(yy)>40) then
yy = "19"..yy
         yy = "20"..yy
end
       formatted = yy.."-"..mm.."-"..dd
      return formatted
                                                                                                                                                 Ln: 4 Col: 27 Sel: 0
```

Using the Tool Bar



The tool bar icons allow you to do the following, from left to right:

- · Load contents of external LUA script into editor
- Save the contents of LUA script

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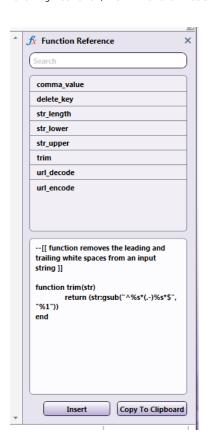
- Export the LUA script into a new file
- · Cut text
- · Copy text
- Paste text
- Undo last action
- Redo last Undo
- · Toggle line numbers
- Toggle white spaces/tabs
- · Text wrap
- Toggle integrate command shell for testing
- · Test functions
- Toggle built-in function library

Using the Function Reference Library

To help you get started, the Metadata Scripting node comes with a function reference library. You can browse through these standard functions and, if desired, copy or insert a specific function into the script editor to modify according to your business requirements.

Do the following:

1. To get started, select a function from the library; the function will then appear in the bottom of the function reference library panel. In the following illustration, the trim function was selected:



2. To insert the function into the LUA script editor, select the **Insert** button. The function will appear at the bottom of the script editor, as in the following illustration:

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```
function get_name()
return string.format("Hello-%s-END", trim(myData[1]))

end

function removes the leading and trailing white spaces from an input-string ]

function trim(str)
return (str:gsub("^%s*(.-)%s*$", "%1"))

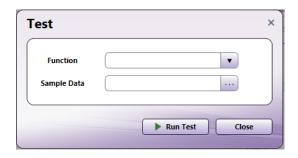
end
```

3. To copy the function to paste into the LUA script editor or another application, select the Copy to Clipboard button.

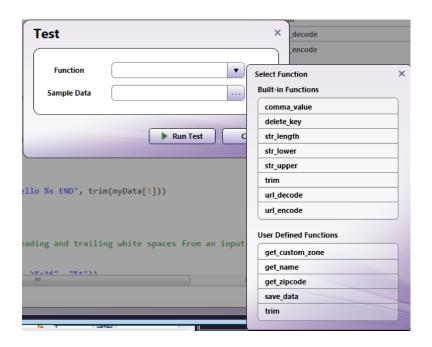
Testing Functions

Once you have created/modified a function, you can test it from within the LUA text editor. Do the following:

1. Click on the **Test** button on the tool bar. A Test pop-up window will appear, similar to the following illustration:



2. Click on the down arrow in the Function field to choose the function that you want to test. A drop-down palette will appear displaying all built-in functions that the Metadata Scripting node comes with as well as any custom functions that have been created. See the following illustration for an example:



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- 3. Enter sample data to test with in the Sample Data field. You can click on the ellipsis button next to the field to expand this field.
- 4. Select the **Run Test** button to begin the test.
- 5. The command shell will appear at the bottom of the screen, displaying the results of your test. See the following illustration for an example:

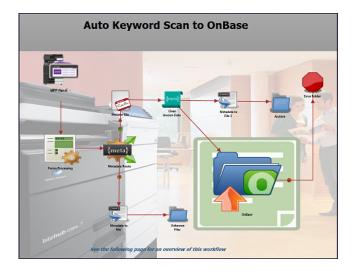
```
% 🛅 🖺 🦠 🙋 # 式 👼 🔳 ▶ Test
1 --[[ remove comma from numner values ]]
3 function strip_comma(amount)
    local formatted = amount
    while true do
      formatted, k = string.gsub(formatted, "^(-?%d+),(%d%d%d)", '%1%2')
      if (k==0) then
        break
      end
10
    end
    return formatted
11
12 end
13
14 --[[ convert date from mm/dd/yy to yyyy-mm-dd ]]
16 function convert_date(date_str)
17 local formatted = date str
    _, _, mm, dd, yy = string.find(string.lower(formatted), "^(-?%d+)/(-?%d+)/(-?%d+)")
    if (string.len(mm)<2) then</pre>
      mm = "0"..mm
    end
Output / Console
Running Test ...
Function: convert_date
Sample Data: 10/22/99
Result: 1999-10-22
Test Successful
LUA >
                                                                                                      Ln: 1 Col: 1 Sel: 0
```

Example

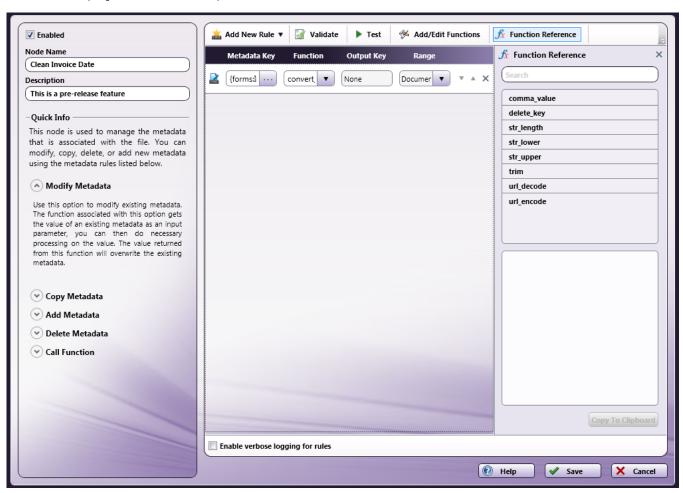
In the following workflow, the date, invoice number, vendor name, PO number, and invoice amount were extracted from incoming invoices and captured as metadata. All invoices were renamed with the vendor name and processed files and extracted metadata are stored in the OnBase content management system. However, the format of the extracted dates needs to change from mm/dd/yy to yyyy-mm-dd before being sent to OnBase.

Here is a graphical representation of this workflow:

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The Metadata Scripting node was used to manipulate the metadata as follows:



- A Modify Metadata rule was created, using the date metadata from the Forms Processing node (in this case, {forms:InvDate}.
- Using the LUA text editor, a user-defined function was created called convert_date that converts the date from mm/dd/yy to yyyy-mm-dd, as follows:

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```
1 --[[ convert date from mm/dd/yy to yyyy-mm-dd ]]
3 function convert_date(date_str)
    local formatted = date_str
    _, _, mm, dd, yy = string.find(string.lower(formatted), "^(-?%d+)/(-?%d+)/(-?%d+)")
    if (string.len(mm)<2) then
  mm = "0"..mm</pre>
10
11
    if (string.len(dd)<2) then
15
16
    if (string.len(yy)<2) then
17
     yy = "0"..yy
18
19
20
    if (string.len(yy)<4) then
      if (tonumber(yy)>40) then
yy = "19"..yy
        yy = "20"..yy
25
26
27
    formatted = yy.."-"..mm.."-"..dd
return formatted
30 end
31
                                                                                                 Ln: 31 Col: 1 Sel: 0
```

Metadata To File



Use the Metadata to File process node to extract metadata from incoming files and store that information in a separate file. You can output to a variety of metadata file formats or **create customized output file formats** to fit your own specific needs.

For each Metadata to File node you add to a workflow, you specify the following:

- Which metadata to extract. You can select one or more metadata types. The list below shows some possible selection options:
 - Bates stamp
 - SMTP
 - Email
 - LPR
 - Advanced OCR
 - Barcode (standard)
 - o 2D barcode
- The type of file in which to store that information.
- The format of the new metadata file's extension.

The following lists some of the uses for a newly created metadata file:

· Record keeping

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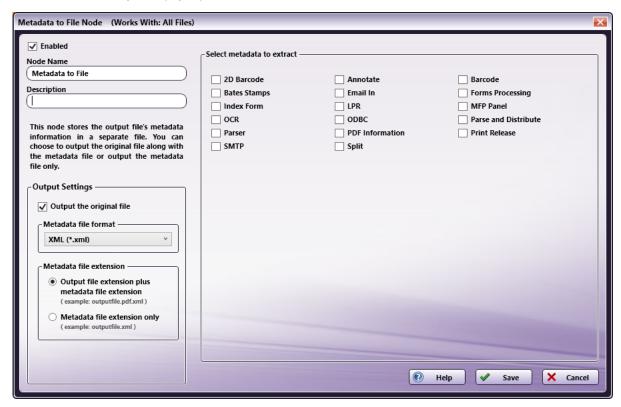
- Import into other systems for search purposes
- Routing in other nodes in a Dispatcher Phoenix workflow, for example the Parse & Distribute node.

Note: This process works with all file types.

Using the Metadata to File Node

To open the Metadata to File properties window, add a Metadata to File process node to a workflow and double-click on it. The following illustration shows the Metadata to File properties window.

Note: The illustration may not display all possible metadata.



General Settings

- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Output Settings

This area contains the following options:

- Output the original file To output the original file along with the newly created metadata file, check the box. To output only the metadata, leave the box blank.
- Metadata file format Choose the format of the file you want to store the metadata. You have the following options:
 - XML (Extensive Markup Language)
 - INI (Initialization)

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- CSV (Comma-Separated Values)
- JSON (JavaScript Object Notation)
- Custom For more information, see the Creating Custom Output Files section below.
- Custom (Batch) This option allows for the creation of a single CSV file that contains all metadata from all processed documents in the batch

Note: The Custom and Custom (Batch) output file format options are not available when used with the following Dispatcher Phoenix licenses:

- Dispatcher Phoenix ScanTrip
- Dispatcher Phoenix Release2Me+
- Metadata file extension Select the extension for the newly created metadata file. Choices are:
 - Output file extension plus metadata file extension This option includes the output file's extension along with the metadata file's extension. For example, if you enable this option and the node is processing a file named 123.TIFF and you chose to create an INI file, the newly created metadata file would be 123.TIFF.INI.
 - **Metadata file extension only** This option includes the metadata file's file extension. For example, if you enable this option and the node is processing a file named 123.TIFF and you chose to create an XML file, the newly created metadata file would be 123.XML.

Note: The newly created metadata file uses the same file name as the output file.

Select metadata to extract

This area lists all of the metadata types available within the workflow. For example, if you have added an Advanced OCR node to the workflow with zones defined, a check box for Advanced OCR will appear. Check the box next to one or more metadata you want to extract to a separate file. The following table lists some of the possible metadata types that may appear in this area:

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Metadata	Description	
2D Barcode	To extract 2D barcode metadata, a 2D Barcode Processing node must come before the Metadata to File process at some point in the workflow.	
Advanced OCR	To extract OCR metadata, an Advanced OCR node must come before the Metadata to File process at some point in the workflow. When defining the Advanced OCR node process, zones must be specified (either manually or automatically) and the "Original Document + Metadata" option must be chosen for the OCR output.	
Annotate	To extract Annotation metadata, an Annotate processing node must come before the Metadata to File process at some point in the workflow.	
Barcode	To extract standard barcode metadata, a Barcode Processing node must come before the Metadata to File process at some point in the workflow.	
Bates stamp	To extract Bates stamping metadata, an Advanced Bates Stamp node must come before the Metadata to File process at some point in the workflow.	
MFP Panel	To extract MFP Panel node metadata, a MFP Panel node must come before the Metadata to File process at some point in the workflow.	
Email	To extract email metadata, an Email Parser node must come before the Metadata to File process at some point in the workflow. When defining the Email Parser node process, you must choose which metadata will be forwarded along with the extracted email attachments.	
Forms Processing	To extract forms processing metadata, a Forms Processing node must come before the Metadata to File process at some point in the workflow. When defining Forms Processing zones, you must specify the Metadata Key for the zone.	
Index Form	To extract Index Form metadata, a MFP Panel node with an Index Form associated with it must come before the Metadata to File process at some point in the workflow.	
LPR In	All LPR metadata received at the time of submission will be extracted from the output file.	
ODBC	To extract ODBC metadata, an ODBC processing node must come before the Metadata to File process at some point in the workflow.	
Parse	To extract the values from regular expression search operations, a Parse node must come before the Metadata to File process at some point in the workflow.	
Parse and Distribute	To extract the values from regular expression search operations, a Parse and Distribute node must come before the Metadata to File process at some point in the workflow.	
PDF Data	To extract PDF metadata, a PDF Data Extraction node must come before the Metadata to File process at some point in the workflow.	
Release2Me	To extract Release2Me metadata, a Release2Me node must come before the Metadata to File process at some point in the workflow.	
SMTP	All SMTP metadata received at the time of submission will be extracted from the output file.	
Split	To extract Split metadata, a Split node must come before the Metadata to File process at some point in the workflow.	

Structure of XML File

XML files consist of one root element named <file/\> with the following required attributes:

- 1. name the name of the file that this XML document is associated with.
- 2. size the number of bytes of the 'name' file.
- 3. mtime the number of seconds from the UNIX epoch that the 'name' file was modified.

The < file / > element may contain one or more < meta / > elements. No other XML element may exist as a direct child of < file / >.

The <meta/\> element has two required attributes:

- 1. group A short but friendly descriptor used to separate where the variables came from.
- $\ensuremath{\mathsf{2}}.$ name The variable name, either defined by the system or by the Index Form designer.

The <meta/\> element may have one of two possible child elements:

- document Contains the variable's value.
- page This element contains the variable's value as it relates to specific pages.

Structure of an INI File

The format of an INI file follows this structure:

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```
[file]
name=sample-file.pdf
size=205491
ctime=0
mtime=1622651543

[group]
metadata-variable-name1=matadata-value1
metadata-variable-name2=matadata-value2
```

Note: ctime refers to the time the node took to create the file. mtime refers to the time the node took to modify the file.

Structure of a CSV File

The format of an CSV file follows this structure:

```
file, name, sample-file.pdf
file, size, 205491
file, ctime, 0
file, mtime, 1622651543
group, metadata-variable-name1, "matadata-value1"
group, metadata-variable-name2, "matadata-value2"
```

Structure of JSON File

The format of JSON files follow this structure:

```
{name:'', size:0, ctime:0, mtime:0, meta: [
{group:'', name:'', values: {
Document = {doc: %VALUE%}
Per Page = {%PAGE%: %VALUE%}
}
]
}
```

For example:

```
{
"name" : "pdf_form_maker1_new.pdf",
"size" : 58750,
"ctime" : 0,
"mtime" : 1427808953,
"meta" : [
{
   "group" : "pdf",
   "name" : "editable",
   "values" : {
   "doc" : "true"
}
}
}
]
]
}
```

Creating Custom Output Files

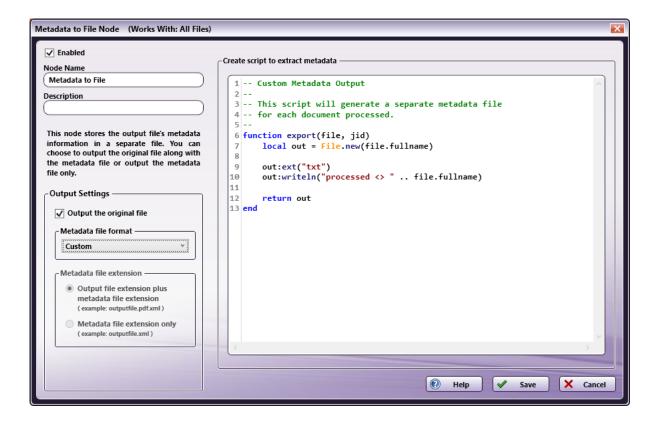
Dispatcher Phoenix also gives you the option to create your own file format in which to store metadata. This is useful if you need to control the output of the file to fit your system, for example when the other standard formats such as XML will not work with the content management system or other application that you are working with.

Note: The Custom and Custom (Batch) output file format options are not available when used with the following Dispatcher Phoenix licenses:

- Dispatcher Phoenix ScanTrip
- · Dispatcher Phoenix Release2Me+

To create a customized file format, choose the **Custom** option from the **Metadata file format** drop-down list. Once selected, the **Select metadata to extract** box containing the various metadata types disappears and is replaced by the **Create script to extract metadata** box. This text box is pre-populated with syntax highlighting for Lua (for more information about Lua, see the **Lua 5.3 Reference Manual**). You can use this very simple example to get started. See the following illustration:

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Export Function

The Lua script must implement a function called "export" that accepts the two arguments:

- The first argument (hereafter file) represents the basic file information and metadata
 - file.name
 - file.ext
 - file.fullname
 - file.size
 - file.mtime
 - file.ctime
 - file.contents
 - read(count)
 - readline()
 - seek(whence, offset)
 - lines([format])

Note: The optional format string can be "base64" to perform conversion.

- file.{metadata group name} (i.e., pdf, bates, ocr, etc.)
 - file.pdf.author
 - file.pdf['author']
 - file.bates.Stamp1
 - file.ocr['zone.MyZone'][1] = value of zone.MyZone on 1st page
 - file.ocr['zone.MyZone'][2] = value of zone.MyZone on 2nd page

Note: If the metadata contains periods, it must be wrapped in brackets and quotes, like ["zone.MyZone"].

- The second argument (hereafter \mathtt{jid}) represents user information
 - $\circ \ \, \mathsf{jid}.\mathsf{user}\,\mathsf{contains}\,\,\mathsf{all}\,\,\{\mathsf{user}\,{:}\,{}^{*\,*\,*\,*}\}\,\,\mathsf{values} \\$

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- Examples: jid.user.name, jid.user.domain, jid.user.email (if defined)
- jid.fs contains all {fs:****} values
 - Examples: jid.fs.DesktopDirectory, jid.fs.CommonApplicationData

The "Export" function should return an instance of 'File.new()' or 'nil'. Tocreate your output file, use the following syntax:

```
local out = File.new("my filename here")
Or
local out = File.new(file.fullname)
```

File Object Methods

Here are the file object methods that you can use:

- write("some data")
- writeln("some data that has a newline appended to it")
- ext("change file extension")
 - ext("txt")
 - ext("xml")
- eol("change newline character")
 - eol("\n")
 - eol("\r\n")

There is also a global function called 'Print' that can be used to log messages.

Example

In a workflow that extracts data from invoices, the following XML file is created:

```
invoice-2.jpg.xml 🖾
    <meta group="ocr" name="zone.Date">
          <page number="1">3/19/2004</page>
         </meta>
 5
        <meta group="ocr" name="zone.Name">
           <page number="1">John Doe</page>
 6
 8
         <meta group="ocr" name="zone.Number">
 9
           <page number="1">100200 </page>
 10
         </meta>
     </file>
 12
```

However, the format and content of this XML will not work with a customer's existing system. In this case, the following custom file was created:

The following custom script was used to create this custom file:

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```
Create script to extract metadata
  1 MONTHS = {}
  2 MONTHS[1] = "Jan"
  3 MONTHS[2] = "Feb"
  4 \text{ MONTHS}[3] = "Mar"
  5 MONTHS[4] = "Apr"
  6 MONTHS[5] = "May"
  7 MONTHS[6] = "Jun"
  8 MONTHS[7] = "Jul"
  9 MONTHS[8] = "Aug"
 10 MONTHS[9] = "Sep"
 11 MONTHS[10] = "Oct"
12 MONTHS[11] = "Nov"
 13 MONTHS[12] = "Dec"
 15 function export(file, jid)
 16
         local ocr = file.ocr
         local out = File.new(file.fullname)
         local names = string.split(tostring(ocr['zone.Name'][1]), " ")
 18
         local fname = names[1]
 19
 20
         local lname = names[2]
 21
         local pdate = string.split(tostring(ocr['zone.Date'][1]), "/")
         local year = pdate[3]
local month = MONTHS[tonumber(pdate[1])]
 22
 23
 24
 25
         -- log some values
print(tostring(ocr['zone.Name'][1]))
 26
         print(tostring(ocr['zone.Date'][1]))
print(tostring(ocr['zone.Number'][1]))
 30
          -- set file extension
         out:ext("bif")
         out:writeln("[Documents File]")
out:writeln("[documents]")
 35
 36
         -- Writes Document Line of BIF file, includes Document Type and Image File location
 37
         out:writeln("document1=City_Of_Atlanta\t" .. tostring(jid.fs.DesktopDirectory) .. "\\output\\ocr-forms\\" .. file.fullname)
 38
 39
         -- Enter index names for ViewWise Document Type Specified, these are case sensitive
 40
         -- and must match exactly as they exist in ViewWise.
 41
         out:writeln("doc1.fields=User|First Name|Last Name")
 42
 43
         -- Enter index value variables from RRT's
         out:writeln("doc1.field1=" .. tostring(orr['zone.Name'][1]))
out:writeln("doc1.field2=" .. tostring(fname))
out:writeln("doc1.field3=" .. tostring(lname))
 44
 45
 46
 47
         -- Writes out BIF file options as specified in beginning of this script out:writeln("doc1.location=City_Of_Atlanta/Gas/" .. year .. "/" .. month)
 48
 50
         out:writeln("doc1.create_location=True")
         out:writeln("doc1.append=False")
 51
         out:writeln("doc1.delete_images=True")
 53
 54
          -- return File or `nil` to bypass
 55
         return out
 56 end
```

PJL Print Preferences



The PJL Print Preferences process allows you to specify basic and advanced PJL print preferences for your job. These preferences can be applied automatically or specified directly at the MFP. This process is designed to be used as part of Dispatcher Phoenix's Release2Me solution.

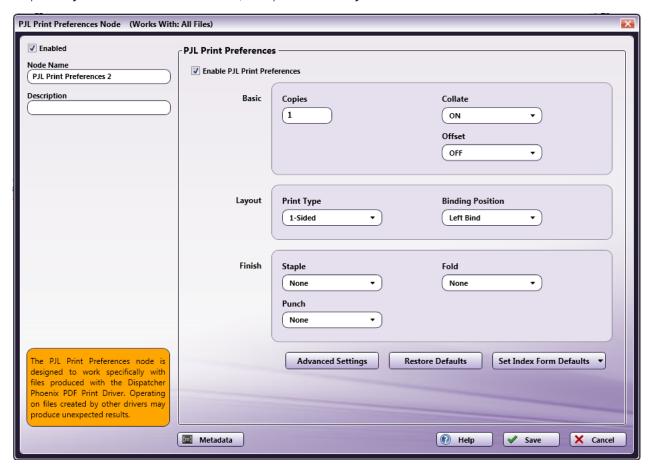
To allow users to specify print settings at the MFP after their print jobs have been released from the queue, you can attach a PJL Print Preferences index form to a Release2Me node. In this case, you must make sure that the PJL Print Preferences node comes *after* the Release2Me node in the workflow.

You can also use this node to add, replace, or remove advanced PJL headers from your print files.

Note: These print settings are designed to work with the Dispatcher Phoenix Print Driver. Support for other drivers will vary. Settings specified here will not necessarily override PS and PCL files.

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To open the PJL Print Preferences Node window, add a process node for PJL Print Preferences and double-click on it.



- Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node were not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the PJL Print Preferences node.
- In the **Description** field, enter a description for the PJL Print Preferences node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Specifying PJL Print Preferences

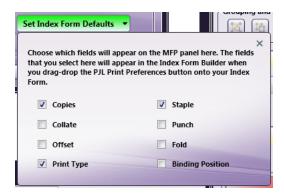
Using this node, you can do the following:

- 1. To modify PJL print preferences, make sure the **Enable PJL Print Preferences** box is enabled. To add customized PJL headers to incoming documents, uncheck this box.
- 2. Specify the following Basic settings:
 - Copies Enter the number of copies to print.
 - \circ **Collate** Choose ON, OFF, or None to keep existing settings in incoming documents.
 - Offset Choose ON, OFF, or None to keep existing settings in incoming documents.
- 3. Specify the following Layout printing preferences:
 - Print Type Choose 1-Sided, 2-Sided, Booklet, or None to keep existing settings in incoming documents.
 - Binding Position Choose Left Bind, Right Bind, Top Bind, or None to keep existing settings in incoming documents.
- 4. Specify the following Finish printing preferences:
 - Staple Choose Corner, 2 Position, or None to keep existing settings in incoming documents.
 - Fold Choose Center Fold or None to keep existing settings in incoming documents.
 - Punch Choose 2 Hole, 3 Hole, or None to keep existing settings in incoming documents.

Notes:

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- Booklet overrides Collate, Staple, and Punch settings. With the Booklet Layout, Staple and Punch are set to Off and Collate is set to On.
- Fold overrides Staple, Punch, Collate, and Offset settings. With the Fold Finish, Collate is set to On, Offset is set to Off, and Staple and Punch are set to Off.
- Staple overrides Offset. With the Staple Finish, Offset is set to Off.
- 5. To add custom PJL headers to incoming documents, select the **Advanced Settings** button.
- 6. To restore the PJL Print settings to their default values, select the Restore Defaults button.
- 7. This node can also be used in the Index Form Builder to allow users to access printing preferences directly at the MFP panel. By default, the Index Form will be created with the Copies, Print Type, and Staple options; however, you can customize the Index Form by selecting the **Set Index Forms Defaults** button. A drop-down palette will appear, which allows you to choose the fields that you want added automatically to the Index Form when you drag-drop a PJL Print Preferences node onto the Index Form Builder's canvas area. See the following illustration:



Note: If you choose three fields (or less), they will be displayed as buttons on the Index Form; however, if you choose more than three fields, they will be displayed in drop-down list format.

Specifying Additional PJL Headers

You can also use this node to do the following:

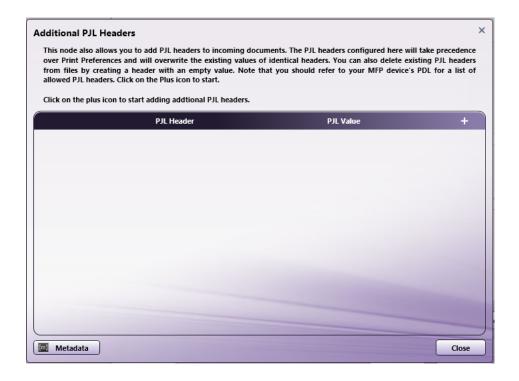
- Add additional PIL headers to incoming documents.
- Modify the values of existing PJL headers in incoming documents.
- Delete existing PJL headers from incoming documents.

Important! Adding custom PJL headers may cause the document to not print correctly. Make sure you know which PJL headers are suitable for the specific device you are printing to.

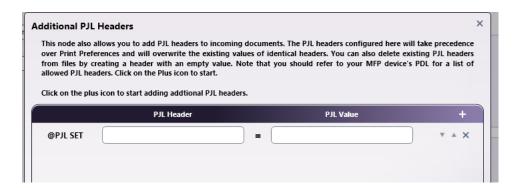
Do the following:

1. To get started, select the **Advanced Settings** button. The following palette will appear:

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2. Click on the + button. An empty row will appear, as in the following illustration:



- 3. Enter the name of the PJL Header next to the @PJL SET label and its corresponding value after the = sign.
- 4. Continue adding rows as necessary.
- 5. To delete a row, click the **X** button.
- 6. To move a row up or down in the list, click the **arrow** buttons.
- 7. If you create a PJL Header row with an empty value, that specific PJL Header in incoming documents will be removed.
- 8. Any value specified here will overwrite existing values for the same PJL Header in incoming documents.

OCR

Advanced OCR



Use the Advanced OCR process node to refine optical character recognition (OCR) results and extract metadata through the use of **zones**. Through zones, you can define how you want the **OCR engine** to recognize various elements on the page such as text, forms, tables, graphics, etc. For

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example, to capture invoice numbers from incoming documents, you can create a zone in the area of the document where invoice numbers appear. In addition, zones can extract metadata automatically and associate the metadata with the original document.

This node works with the following file types:

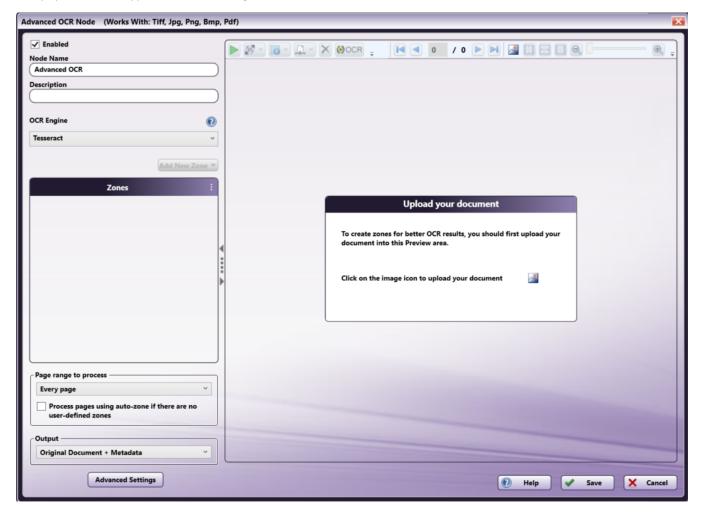
- TIFF
- JPG
- PNG
- BMP
- PDF

Notes:

- Some features of this node may not work correctly without Microsoft.NET Framework 3.5 or higher. We recommend you install the framework from Windows Update or download it from the Microsoft web site.
- The recommended minimum DPI for scanned documents is 200. Better results can be expected for documents 300 DPI and above.
- This node includes the Tesseract OCR engine. You can also purchase a license for the OmniPage OCR engine.

Properties Window

To configure the Advanced OCR process node, drag-drop the node on to the Workflow Builder's work area and double-click on it. The Advanced OCR node properties window appears, as in the following illustration:



The above illustration shows the default configuration for the Properties window, with Tesseract as the OCR engine.

If you have access to more than one OCR engine, the OCR Engine field will appear in a dropdown menu. Options include:

- Tesseract
- OmniPage

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On the Advanced OCR properties window, you can fully define and customize zones for your OCR processing. The window consists of the following areas:

- General Settings
- Preview Area
- ToolBar
- Zone List
- · Additional Settings

General Settings

- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- OCR Engine If multiple OCR engines are licensed and installed in Dispatcher Phoenix, a dropdown menu appears from which you can select the engine you want to use. If only one engine is available on your system, the name of the engine displays at this field.

Note: If you change to a different OCR engine, all configuration settings except the **Enabled** checkbox and **Node Name** are discarded and set back to the default settings.

Buttons

- Advanced Settings To access the Advanced OCR Settings window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

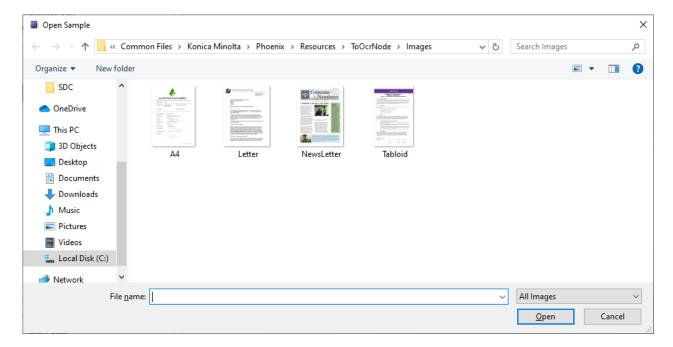
Preview Area

Use the Preview area to upload a sample document you can use to help define your zones. The document should resemble the documents you want to scan.

When you first open the Advanced OCR node properties window, the Preview area contains only the **Upload your document** window, and many options on the screen are inactive. Once you upload a document, the image appears in the Preview area and the options activate.

To upload a document, click on the icon in the **Upload your document** window or click on the **Upload** icon on the **Toolbar**. The Open Sample window appears from which you can choose a document. In addition, the application provides several sample documents of various sizes that you can also use. See the following illustration:

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Select a document and click **Open**. The sample document appears in the Preview area.

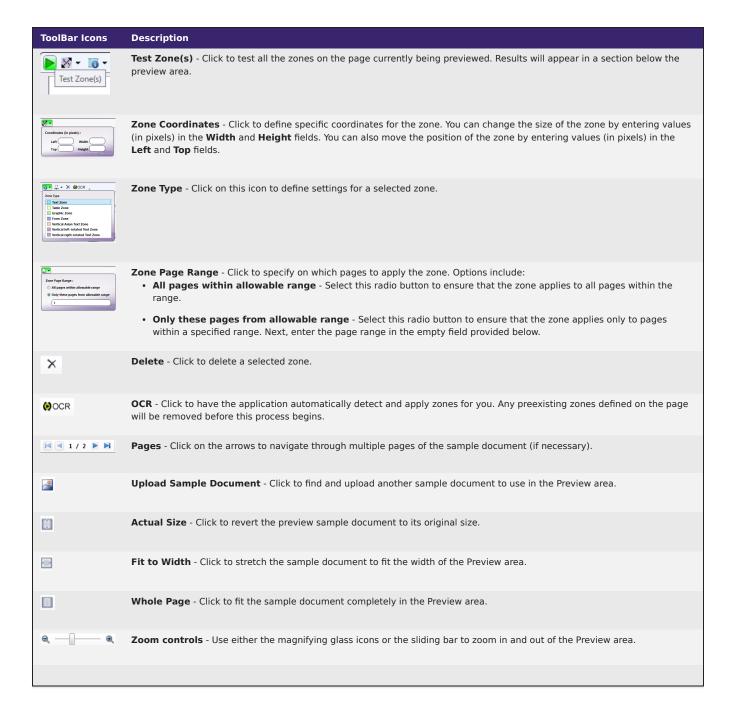
Note: Once you select a sample document, you can select a different document by clicking on the **Upload** icon on the Toolbar. If you have already created zones, once you select the new document a window appears and you choose to save or delete the existing zones.

ToolBar

Use the toolbar at the top of the window to further define the zone as well as customize the view of the node properties window. Note that many options on the Toolbar do not activate until you upload a sample document to the **Preview area**.

When using the drop-down palettes on the Toolbar, pressing the **Enter** key or clicking anywhere outside of the palette applies those changes to the zone.

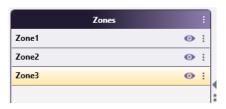
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Zone List

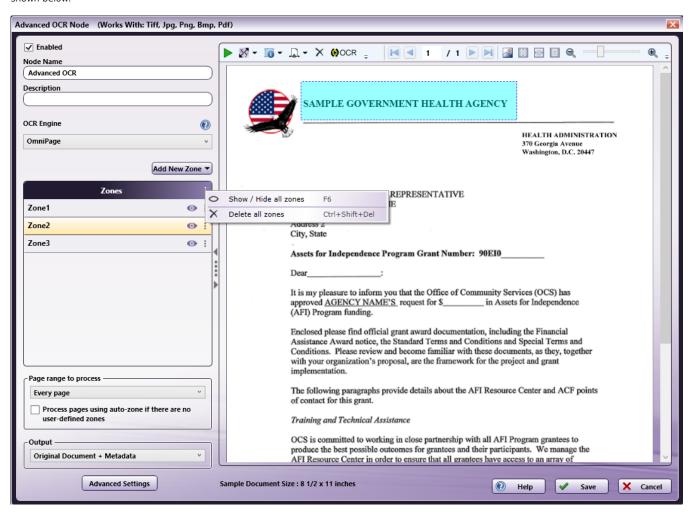
Use this area to create, edit, and delete detection zones. Zones define areas of an imaged document for use by the **OCR engine**, and they can output text from the document. You can **create zones manually** or you can configure the node to **create zones automatically**. For example, to capture invoice numbers from incoming documents, you can create a zone in the area of the document where invoice numbers appear.

Once you upload a document to the **Preview area**, the Zone List activates. All defined zones (if any) for the node appear in the list, as in the following illustration:

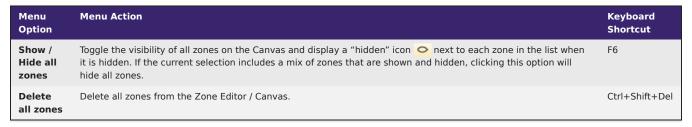


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To access additional options for zones, open the "More Actions Menu" menu by clicking the icon at the upper right of the Zones List area, as shown below:

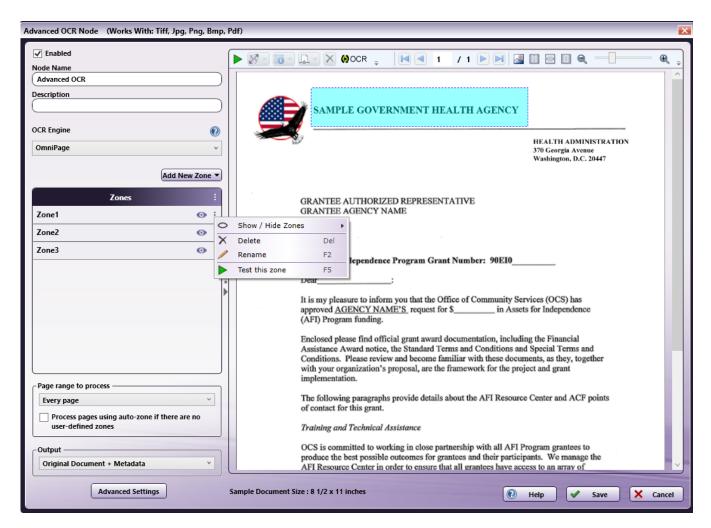


Clicking the three dots in the **Zones** area will open up the **More Actions Menu** that allows you to:



Clicking the three dots next to a zone allows you to:

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Menu Option	Menu Action	Keyboard Shortcut
Show / Hide zone	See next table	See next table
Delete	Delete the selected zone from the Zone Editor / Canvas.	Del
Rename	Rename the selected zone.	F2
Test this zone	Run and test a single selected zone, to help users test and debug individual zones.	F5

Notes:

- After successfully testing a zone, the zone results query section will appear at the bottom of the preview area with the values for all tested zones.
- You can adjust the size of the zone area, the preview area, and the zone results query section that appears after testing a zone by clicking and dragging the edges between two of those areas. For example, you can make the Zones area larger (and the preview area smaller) by dragging the border between the zones area and the preview area to the right.
- There are two ways to copy the value of a tested zone:
 - 1. You can right click on the zone and select ${\bf Copy\ zone\ value}.$
 - 2. You can right click on the zone result in the zone results query section and select Copy.

There is a second menu for **Show / Hide Zone** with more options:

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Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a "hidden" icon onext to each zone in the list when it is hidden. If the current selection includes a mix of zones that are shown and hidden, clicking this option will hide all zones.	F6
Show / Hide this zone	Toggle the visibility of the selected zone on the Canvas.	F7
Hide all zones but this	Hide all zones on the Canvas except the selected zone.	F9

The node also supports additional actions:

Menu Option	Menu Action	Keyboard Shortcut
Test selected zones	Run and test more than one selected zones, to help users test and debug multiple selected zones at a time.	F5
Copy zone value to the Windows Clipboard	Copy the detected zone value to the Windows clipboard. You can access this command from the right click menu on the zone result, which is produced after using the Test Zone(s) feature.	Ctrl+c
Delete selected zones	Delete selected zones from the Zone Editor / Canvas.	Del

Note: You can also **Rename**, **Delete**, and/or **Show / Hide** the properties of individual zones by right-clicking them in either the Zones List area or the Preview area and selecting an option from the menu that appears.

Multiple zones can be selected two ways:

- 1. Click and drag the mouse in the Preview area to highlight multiple zones at once
- 2. Use CTRL+Click to select multiple zones. This method works in the Zones area and in the Preview area.

If you have multiple zones selected, you must select the **More Actions** menu from any of the selected zones, and the options to modify or test multiple zones will appear.

Creating Zones Manually

To create zones manually, do the following:

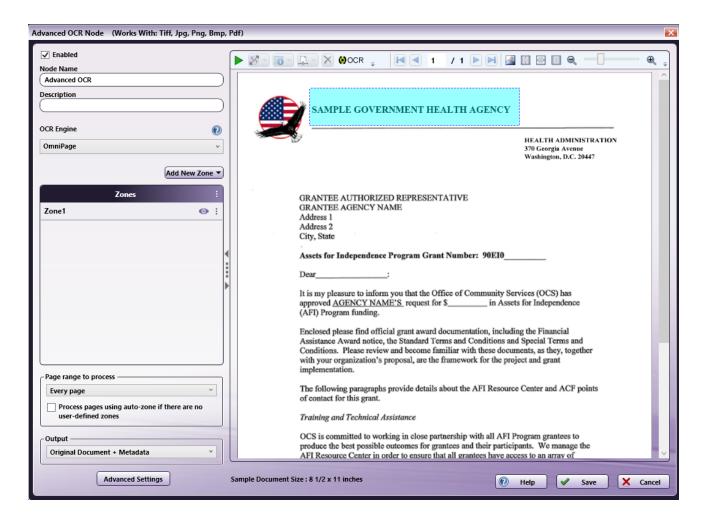
1. Add New Zone - Click this button to access a drop-down palette, as in the following illustration:



- 2. On the Add New Zone drop-down palette, do the following:
 - Zone Name Enter an identifying name for the zone (e.g., invoice or address). You can enter up to 15 characters.
 - Left and Top Enter a value (in pixels) to position the zone from the left and top of the document.
 - Width Enter a value (in pixels) to define an appropriate width for the zone.

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- Height Enter a value (in pixels) to define an appropriate height for the zone.
- Zone Page Range Specify the pages on which the zone will be applied. Options include:
 - All pages within allowable range Select this radio button to apply the zone to all pages within the specified range. This means that
 a zone configured on the first page of the document will automatically be applied to the rest of the pages in the document (if the
 specified page range to process is Every Page).
 - Only these pages from allowable range Select this radio button to apply the zone to only a specific range of pages within the specified range. Next, then enter the page range in the empty field provided.
- Save Click this button when you are done. The zone appears in the specified location on the Preview area. See the illustration below.
- Cancel Click this button to exit the drop-down palette without saving any changes.



Creating Zones Automatically

The Advanced OCR node can automatically detect zones, whether or not you upload a sample document. If you choose not to upload a sample document, you can use the **Page range to process** and **Output** fields to specify a page range and output format, respectively. Then select the **Save** button.

If you choose to upload a sample document, the OCR engine can divide the content of pages into ordered zones automatically. Do the following:

• OCR - To create zones automatically, click on the OOCR icon on the Toolbar. On a multi-page document, the zones appear on the page you are

currently previewing. For example, on a four-page document, if you click this button while previewing page 2, the zones appear on page 2. To apply zones to another page in multi-page document, preview that page then click on this button.

Editing Zones

To edit a zone, click on it in the Zone List or the Preview area. You have the following options for editing a selected zone:

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Preview area

- Re-locate Click on the zone and drag it to a new area on the palette.
- **Re-size** Click on one of the handles on the zone border and drag the edge to a new location on the palette. Note that the handles may not be available if you drastically change the size of the sample document. In such cases, click on the vicenomous icon on the Toolbar to use the Zone Coordinates option to re-size the zone.

Defining Type/Content for Zones

You can choose settings for each zone to match the specific format of your zone content. With the zone selected on the Preview area, click on the icon on the toolbar to display the Zone Type drop-down palette. Next, choose a type for the zone. The table below lists your options:

Note: The zone types available in the drop-down palette is determined by the **OCR engine**, based on the functional capabilities of the engine. The table below lists the options available for each OCR engine.

Zone Type	OmniPage	Tesseract
Text Zone - Zone contents will be treated as flowing text.	Υ	Υ
Table Zone - Zone contents will be treated as a table, with information expected in rows and columns.	Υ	Υ
Graphic Zone - Zone contents will be treated as an embedded image, and not as recognized text (e.g., photos, logos, and drawings).	Υ	Υ
Form Zone - Zone contents will be treated as form elements and contain a description of the form objects.	Υ	N
Vertical Asian Text Zone - Zone contents will be treated as vertical Asian text.	Υ	N
Vertical left-rotated Text Zone - Zone contents will be treated as vertical text that has been rotated left (e.g.,	Υ	N
Vertical right-rotated Text Zone - Zone contents will be treated as vertical text that has been rotated right (e.g.,	Υ	N

Note: Automatic Image Rotation conflicts with the Vertical left-rotated or Vertical right-rotated options. If selecting either one of these options, disable the default setting of Automatic Image Rotation.

OCR Metadata

Once you define an OCR zone, other nodes in the workflow can reference it.

- The syntax for OCR zone referencing is the following:
 - {ocr:zone.nameofzone.[<page>]}

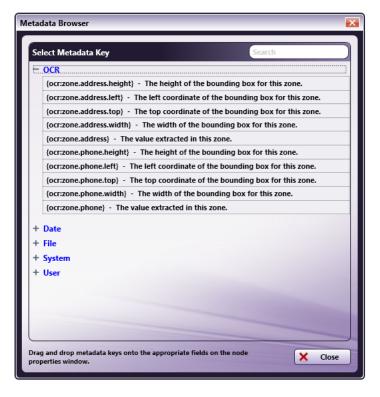
This provides the value extracted in this zone.

- The syntax for where the OCR application found any values in the zone is the following:
 - {ocr:zone.nameofzone.[zonecoordinate]}

[zonecoordinate] is either top, left, width, or height, as defined in pixels.

You can also use the Metadata Browser window to choose the OCR zone variable, as in the following illustration:

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Additional options for OCR Metadata include Specifying Page Level Metadata and Specifying Metadata Occurrence Number.

Additional Settings

You can specify which pages to include in the OCR process and the output format. These fields appear in the lower-left corner of the Advanced OCR Node properties window.

Specifying Page Ranges to Process

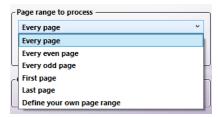
You can specify which pages to include in the OCR process. You have the following options:

- Page Range Process This area appears at the left of the page, below the Zone List. If you the click on the drop-down, the following options appear:
 - **Every page** Process every page.
 - Every even page Process even pages only.
 - Every odd page Process odd pages only.
 - First page Process the first page only.
 - Last page Process the last page only.
 - **Define your own page range** Process a custom page range. Once you choose this option, an empty field appears where you can enter the page range. You have the following options: Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to process pages 1, 2, 5, 6, and 7. Specify a specific sequence within a range of pages by using parentheses. For example, enter 1-10(3) to process every third page from pages 1 to 10. Specify the last page by using 'end.' For example, enter end(-5) end to process pages 15-20 of a 20-page document.

Other examples include:

- To process pages 1, 2, 5,6,7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1). - To process pages 10-15 of a 20-page document, enter: 10-end(-5). - To process every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2). - To process pages 15-20 of a 25-page document, enter: end(-10)-end(-5). - To process pages 10-20 of a 20-page document, enter: end(-10)-end.

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Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., processing pages 10-20 for a three-page document), the file will go out on error.

• Process pages using auto-zone if there are no user-defined zones - When processing multi-page documents, the default behavior is to process only those pages that have zones created on them. If your document includes multiple pages that do not have any zones defined on them, you can enable auto-zoning for those pages by checking the Process pages using auto-zone if there are no user-defined zones box. Zones will be automatically defined for the pages without zones. Note that blank pages will not have zones defined for them.

Note: If you check this option, {ocr:zone} will appear in the Metadata Browser window along with any available user-defined zones.

Choosing an Output Format

Use the Output field to specify the format of the output file. This area appears at the left of the page, below the Zone List.

At the Output field, if you the click on the drop-down, a list of output options appears. The **OCR engine** can affect the list of options available at this field. If an option does not appear at the Output field, it is not supported by the OCR engine. See the table below.

Note: All processed output files include only the content captured in the user-defined zones, with the following exceptions. These output formats include the original file along with the content captured in the zones:

- Original Document + Metadata
- · PDF Searchable

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Output Option	OmniPage	Tesseract
Original Document + Metadata - Outputs the original file along with metadata extracted from defined zones. This is the default setting and is necessary to use metadata in other nodes within the workflow, such as Metadata to File and Metadata Route, for further processing.	Υ	Υ
PDF - A highly configurable, general PDF output converter that supports many PDF features and relies heavily on the position of the recognized characters. The PDF will have a very similar look to the original document.	Υ	N
PDF Searchable - PDF output converter that retains the original image in the foreground with the recognized text hidden in the background (in the correct position). Recommended for archiving and indexing documents. With this format, the entire input document is included as output.	Υ	Y
PDF with image substitutes - Special PDF converter that covers suspect words with their images that have been cut out from the original image.	Υ	N
Microsoft Word options - Outputs the document to various versions of Word. Choices are Word 2000, XP; 97; 2003. Note that Microsoft Word has a length/height limit of 22".	Υ	N
Microsoft Excel - Outputs the document to various versions of Excel. Choices are Excel 2003, XP; 97.	Υ	N
Microsoft PowerPoint - Generates a plain and simple RTF file, which can be interpreted by Microsoft PowerPoint.	Υ	N
XPS Searchable - Outputs the document to an XPS file that is searchable. XPS is an XML-based, fixed-layout document format similar to PDF.	Υ	N
RTF options - Outputs the document to various versions of RTF. Choices are RTF Word 2000, 97, or Word 6.0/95; RTF 2000 Exact Word (renders pages more exactly in Microsoft Word). Note that Microsoft Word has a length/height limit of 22".	Υ	N
Text - Outputs the document to plain text (*.TXT) that can be read by most text editors and word processors.	Υ	Υ
Comma Separated Text - Outputs the document into a tabled text file that can be read by Excel (*.CSV).	Υ	Υ
Formatted Text - Outputs the document to a *.TXT file, trying to retain the layout of the page by inserting extra spaces.	Υ	N
Text with line breaks - Outputs the document to text with a line break after each line.	Υ	Υ
Unicode Text - Outputs the document to plain text, using two-byte Unicode characters.	Υ	Υ
Unicode Comma Separated Text - Outputs the document into a tabled text file using two-byte Unicode characters. The outputted file can be read by Excel.	Υ	Υ
Unicode Formatted Text - Outputs the document to formatted text, using two-byte Unicode characters.	Υ	N
Unicode Text with line breaks - Outputs the document to text with a line break after each line and uses two-byte Unicode characters.	Υ	Υ
XML - Outputs the document to an XML file format.	Υ	N
eBook - Uses the Open Ebook Specification 1.0 XML converter.	Υ	N

Forms Processing



Use the Forms Processing node to conduct advanced searches for unique identifiers in imaged documents via barcode or text searches. You can search for identifiers such as Social Security numbers and telephone numbers. You can extract and/or process (redact, highlight, or strikeout) information based on rules you define - without knowing the exact content of the information or even its exact position on the page.

For example, to redact all numbers found in an Invoice Number field on a form, you can set up rules in the Forms Processing node to automatically search for an Invoice Number label and then redact all numbers to the right of that label.

The Forms Processing node allows you to create rules to search for and process information in forms. You first define a "base rule". You can then associate one or more "subrules" with the base rule. For example, a base rule can search for the static text "Social Security number" on a field in a form and the subrule can find all social security numbers (using the pattern XXX-XXXXXX) after the base rule field. You can assign multiple base/sub rule combinations to a node.

The Forms Processing node can also search for barcodes on the page. You can define rules so that Dispatcher Phoenix uses the barcode data to search for other fields on the form.

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This node works with the following file types:

- TIFF
- JPG
- PDF

Note: The recommended minimum DPI for scanned documents is 200. Better results can be expected for documents 300 DPI and above.

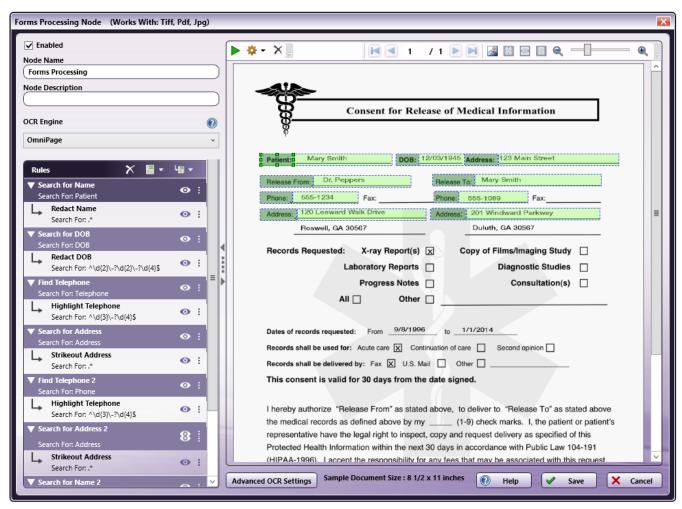
Note: This node includes the OmniPage and Tesseract OCR engines.

For more information, click on the following links to sections in this topic.

- · Using the Rules List Area (creating base rules and subrules)
- · Working with Rules and Zones
- · Using the Actions Tab
- Using the Preview Area
- Using the Toolbar
- · Searching Using Regular Expressions
- Using the Pattern Matching Tool
- Running Rule Configuration
- Regular Expression Examples

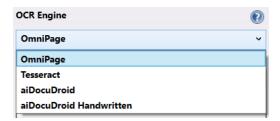
Opening the Forms Processing Node

To open the Forms Processing node properties window, add a process node for Forms Processing to a workflow and double-click on it. The following illustration shows the Forms Processing node:



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- Enabled To enable this node in the current workflow, check this box. If you leave the box blank, the workflow ignores the node and documents will pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. If the workflow contains multiple processes, a description can help to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- OCR Engine If multiple OCR engines are licensed and installed in Dispatcher Phoenix, a dropdown menu appears from which you can select the engine you want to use. If only one engine is available on your system, the name of the engine displays at this field.



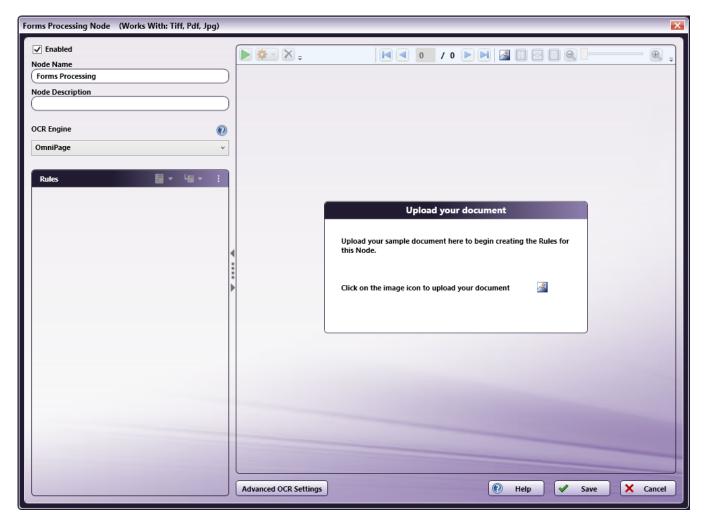
Buttons

- Advanced Settings To access the Advanced OCR Settings window, click this button.
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Uploading a Sample Document

When you first open the Forms Processing node properties window, the Preview area contains no sample document. See the following illustration:

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To proceed with the node configuration, you must first upload a sample document to display in the Preview Area. The document should resemble the document(s) you intend to search with the node. Do the following:

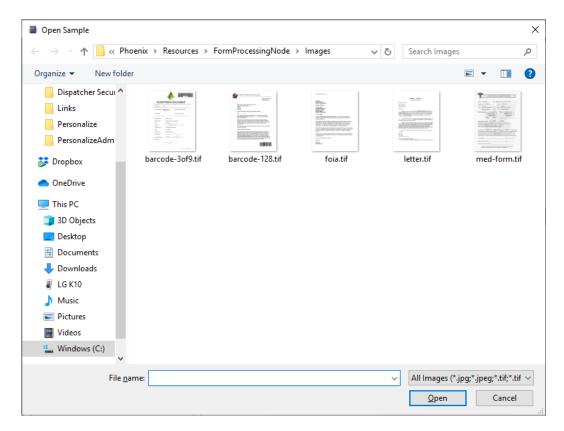
- **Upload** Click this icon to access the **Open Sample** browse folder. The icon appears in the following places on the page. Click on one.
 - o On the toolbar.
 - In the **Upload your document** box in the Preview area.

In the Open Sample browse folder, you have the following options to choose a sample document:

- Choose from several sample documents provided by the application. The documents are of various sizes and reside in the Images folder.
- Navigate to another folder to select your own sample document.

The following illustration shows the Images folder:

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Note: You can replace the sample file at any time by clicking the **Sample Document icon** are in the Preview area's **toolbar**. If you previously uploaded a sample document using the node properties window, Dispatcher Phoenix automatically opens the most recent folder you used when selecting a sample file. For more information about the Preview area's toolbar, see **Using the Toolbar**.

Using the Rules List Area

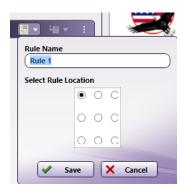
All defined rules display in the Rules List area on the left side of the node properties window. You can adjust the width of this area by clicking and dragging its right-hand border to the left or right.

You can add a rule, delete a rule, or add a new subrule using the toolbar at the top of the Rules List area:



Creating a Base Rule

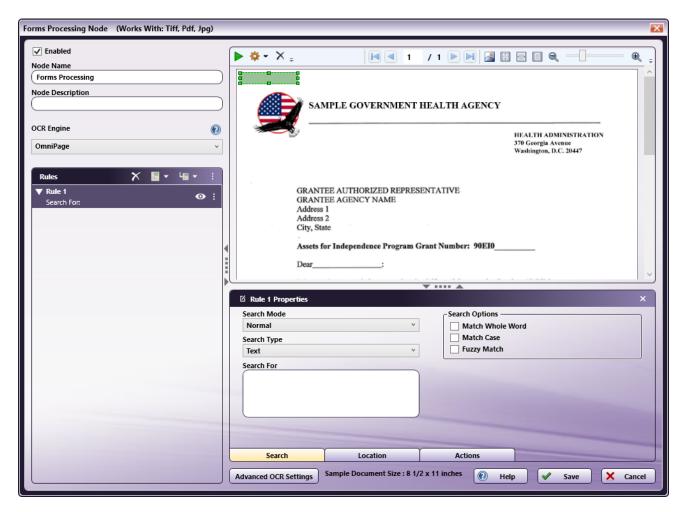
• Add New Rule - Select this button to add a base rule. A drop-down palette appears, as in the following illustration:



- Rule Name Enter a name for the rule. Base rule names are limited to 100 characters with no restrictions on the type of characters you can use.
- **Rule Type** Select Forms Processing or **Checkbox Detection**. Note that this option only appears when you are using the aiDocuDroid or aiDocuDroid Handwritten OCR engines (deprecated).

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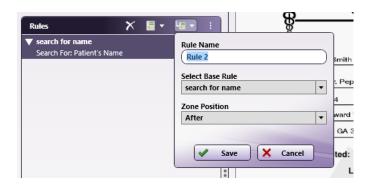
- Select Rule Location Choose a default location for the rule by marking a button in this area. You can adjust this location later by either using the Location tab in the Rule Properties panel or by dragging-dropping the rule's boundary box in the Preview area.
- Save Click this button when you are done. The rule's bounding box appears in the specified default location in the Preview area, as shown in the following illustration:



Note: Base rules appear as a dark-green box.

Creating a Sub Rule

• Add New Sub Rule - To create a subrule of a base rule or another subrule, click on this button. You cannot create subrules until you create a base rule first. A pop-up palette appears, as in the following illustration:



- Rule Name Enter a name for the subrule. Subrule names are limited to 100 characters with no restrictions on the type of characters you can use.
 - $\bullet \ \ \, \textbf{Select Base Rule} \, \cdot \, \\ \text{Select the base rule you to associate the subrule with using the drop-down list.} \\$

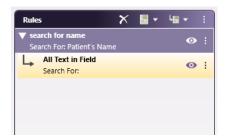
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- Zone Position Specify how to position the subrule zone using the drop-down list. Options are:
 - Absolute
 - Above
 - After
 - Below
 - Before

Zones with positions set to "Above," "After," "Below," or "Before" are called **relative zones**. A relative zone is positioned relative to the zone of the rule or subrule that precedes its subrule in the Rules List area. Conversely, zones configured with **absolute** positioning have locations that don't depend on the positions of other zones.

Note: You can adjust the location of a relative zone by dragging-dropping its boundary box in the Preview area; if a zone's position is set to "Absolute," you can move it either via dragging and dropping, or by using the Location tab in the Rule Properties panel. For more information about positioning different zone types, see **About Relative Zones** and **Using the Location Tab**.

• Save - Select this button when you are done. The subrule's bounding box appears in the specified default location in the Preview area. In addition, the subrule appears indented below its parent rule in the Rules List. In the following illustration, the "All Text in Field" rule is a subrule of the "search for name" rule:

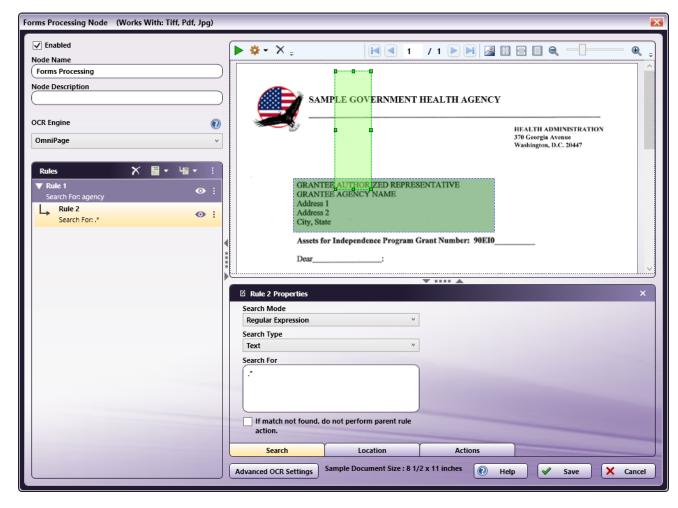


Note: Subrules appear as a light-green box. If a rule cannot complete its search using the criteria entered, and you attempt to create a subrule with a relative zone under this rule, the subrule will not be created. For example, in the rule configuration shown above, if the search for "Patient's Name" did not return any results, the subrule "All Text in Field" would not have been created. If this occurs, re-enter the search criteria for the rule, and then try to create the subrule again.

• **About Relative Zones** - If you configure your subrule as a **relative zone** (i.e., a zone positioned above, after, below, or before the zone of a base rule or another subrule), Dispatcher Phoenix automatically aligns the relative zone with the content specified as a search term in the base rule or subrule preceding it in the Rules List area. By default, the relative zone extends to the edge of the preview area to enable enhanced identification of content that matches your search criteria.

For example, the below image depicts a relative zone configured to search for text above the word "agency" in a sample file:

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Notes:

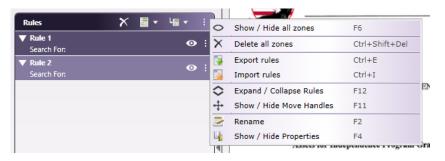
- Although the zone of the base rule extends across several lines of text, the subrule's relative zone aligns specifically with the text defined as the base rule's search term (e.g., "agency").
- Although relative zones automatically extend across a page, you can resize them by clicking and dragging their handles in the Preview area, or by changing their height and width using the Properties panel. For more information on the Preview area and Properties panel, refer to the sections that follow.

Rules Processing

When setting up your rules, note that processing will stop if the results of a rule do not match the Search criteria. For example, if you have a base rule and two subrules and the 1st subrule does not match, then the 2nd subrule will not be processed.

Working with Rules and Zones

To access additional options for rules and zones, open the "More Actions" menu by clicking the icon at the upper right of the Rules List area, as shown below:



The below table describes the options available in the "More Actions" menu:

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Menu Option	Menu Action	Keyboard Shortcut
Show/Hide all zones	Shows or hides all zones in the Preview area. Note that you can also choose to show or hide individual zones or groups of zones. See Showing or Hiding Zones for additional information.	F6
Delete all zones	Deletes all zones from the current node.	Ctrl+Shift+Del
Export rules	Exports rules in the current Rules List area to an XML file. See Importing and Exporting Rules for additional information.	Ctrl+E
Import rules	Imports rules from an XML file to the Rules List area. See Importing and Exporting Rules for additional information.	Ctrl+I
Expand/Collapse Rules	Expands or collapses the tree structure of rules and subrules in the Rules List area. You can also expand or collapse individual base rules and subrules by clicking the or warrow icons to the left of their names in the Rules List area.	F12
Show/Hide Move Handles	Shows or hides a handle tool for each rule or subrule. You can click and drag a handle to re-position a rule in the Rules List area. Note that if you move a base rule that has subrules, all of the subrules move along with the base rule. If you move a subrule that has other subrules to a different base rule, then all subrules under that subrule also move with it.	F11
Rename	Renames the currently selected rule or subrule to a value that you specify.	F2
Show/Hide Properties	Shows or hides the Properties panel for the selected rule or subrule. See Using the Properties Panel for additional information.	F4

Note: You can also rename, delete, and/or show or hide the properties of individual rules or zones by right-clicking them in either the Rules List area or the Preview area and selecting an option from the context menu that appears. You can additionally access this menu by clicking the right of individual rules in the Rules List area.

Showing or Hiding Zones

The Forms Processing node enables you to show or hide zones associated with each rule you create via several methods. You can access these options either from the Rules List area at the left of the screen, or through the Preview area. To show or hide a zone using the Rules List area, you can either:

- Click the "eye" icon o to the right of the name of its rule or subrule; or
- Select one of the options under the **Show/Hide Zones** menu.

To access the Show/Hide Zones menu, either open the "More Actions" menu by clicking the icon, or right-click a rule name, as shown in the image below. You can also access this menu by right-clicking a zone in the Preview area.



The below table lists the options available via the Show/Hide Zones menu. In addition to the methods described above, you can also access each option using keyboard shortcuts.

Menu Option	Menu Action	Keyboard Shortcut
Show/Hide all zones	Toggles the visibility of all zones on or off in the Preview area.	F6
Show/Hide this zone	Toggles the visibility of the selected zone on or off in the Preview area.	F7
Show/Hide zones from this group	Toggles the visibility of the zones associated with the selected base rule or subrule and all of its subrules on or off in the Preview area.	F8
Hide all zones but this	Hides all zones except the selected zone from view in the Preview area.	F9
Hide all zones but this group	Hides all zones except those associated with the selected base rule or subrule and all of its subrules from view in the Preview area.	F10

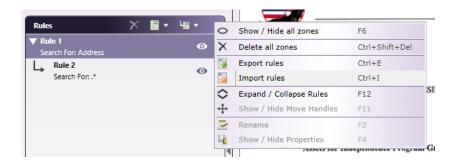
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Note: When a zone is visible in the Preview area, an "eye" icon 💿 appears to the right of its associated rule or subrule in the Rules List area.

Importing and Exporting Rules

In addition to creating rules and subrules, you can also use an XML file to **import** rules to the Rules List area. You can additionally **export** existing rules to an XML file for later use. To import rules, follow the steps below:

1. Click the "More Actions" menu, and select "Import Rules," as shown below:



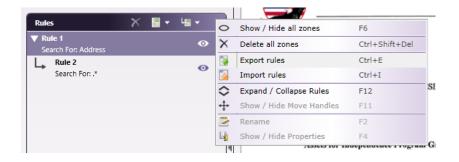
2. Navigate to the folder containing your rules file and open it. If no rules currently exist in the node, Dispatcher Phoenix imports your rules into the Rules List area. If rules are already present, the below dialog box appears:



- 3. If the above dialog box appears, select one of the following options:
 - a) To add the rules from your XML file to the existing set of rules in the Rules List area, click "Append."
 - b) To **replace all currently defined rules** with the rules from your XML file, click "Replace." Note that clicking "Replace" deletes all previously defined rules from the Rules List area.

To export rules, follow the steps below:

1. Click the "More Actions" menu, and select "Export Rules," as shown below:



2. Navigate to a folder in which to store your rules file. Select a name for your file and click the "Save" button. A preview of the XML content of your rules file appears in a browser window:

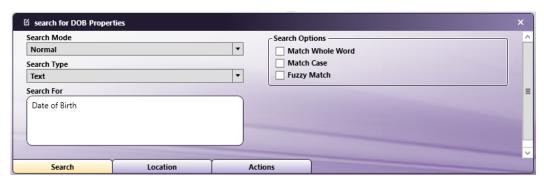
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```
<?xml version="1.0"?>
 <Node IsEnabled="true" Name="Forms Processing 3"
 Guid="d826af51f5224b29bbdf72435de4d23f" NameSpace="FormProcessing"
     <Rules>
      - <Rule IsEnabled="false" Name="Rule 1" Id="1">
           <TextSearch Text="Address"/2
           <Zone OcrRect="121.44,276.96,53.28,12.96" UserUnit="2" Unit="2"
              Width="0.8021" Height="0.25" y="2.8438" x="1.0834"
              Position="1"/>
           <PageRange Value="1..n" Type="1"/>
           <Redact/>
           <Rule Name="Rule 2" Id="2" Required="false">
               <TextSearch Regex=".*"/>
              <Zone UserUnit="2" Unit="2" Width="1.6251" Height="0.2396"
                 y="-0.0517" x="0.055" Position="3"
                 RelativePoint="180,272"/>
              <SearchAt Number="0" Occurrence="3"/>
           </Rule>
```

3. Close the preview window at any time, once you've finished using it. To access your exported XML file again, navigate to the folder in which it's stored.

Using the Properties Panel

The Properties Panel resembles the following illustration:



Editing Rule Names

On the Properties Panel title bar, you can rename the name of the rule by clicking on the **Edit Rule Name** button. The rule name becomes a text entry field, as in the following illustration:



Using The Search Tab



On the **Search Tab**, you can use the options provided under the **Search Mode** and **Search Type** menus to define your search criteria. Options available under the Search Mode menu include "**Normal**" (e.g., static text), "**Regular Expression**," or "**Pattern**." You can choose to apply these

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values either to a **text** or **barcode** search using the Search Type menu. For example, in the above image, a search is being conducted in Normal mode for the text value "Date of Birth."

For more information, see the following sections:

- · Searching For Static Text
- Searching For Barcodes
- · Searching Using Regular Expressions
- Using the Pattern Matching Tool

Making Subrule Matches Required

Subrules have an additional field on the Search tab that allows you to specify whether or not the subrule must be required to match in order for the previous rules to be acted upon.

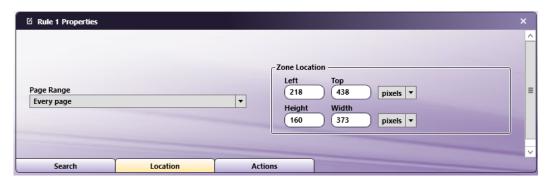
If you enable the **If match not found, do not perform parent rule action** option, the base rule will not be processed if the subrule is not found. See the following illustration:

If match not found, do not perform parent rule action.

Using the Location Tab

Use the Location tab to specify which pages to process and the location of the rule's zone on the page.

For Base Rules



For base rules, you can specify the page range to process and the zone's location/size. Do the following:

- Using the Page Range drop-down list, you can choose one of the following options:
 - Every page Process every page.
 - Every even page Process even pages.
 - Every odd page Process odd pages.
 - First page Process the first page only.
 - Last page Process the last page only.
 - **Define your own page range** Process a custom page range. Once you choose this option, an empty field will appear to enter the page range. Do the following:
 - Specify a page range by using commas and/or dash signs counting from the start of the document. For example, enter 1, 2, 5-7 to process pages 1, 2, 5, 6, and 7.
 - Specify a specific stamping sequence within a range of pages by using parentheses. For example, enter 1-10(3) to process every third
 page from pages 1 to 10.
 - Specify the last page by using 'end.' For example, enter end(-5) end to process pages 15-20 of a 20-page document.

Other examples include:

- To process pages 1, 2, 5, 6, 7, and 19 of a 20-page document, enter: 1,2,5-7, end(-1).
- To process pages 10-15 of a 20-page document, enter: 10-end(-5).
- To process every other page from pages 10-15 of a 20-page document, enter: 10-end(-5)(2).
- To process pages 15-20 of a 25-page document, enter: end(-10)-end(-5).

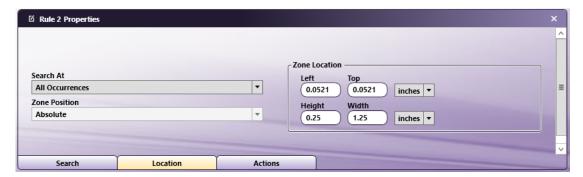
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■ To process pages 10-20 of a 20-page document, enter: end(-10)-end.

Note: If you specify a page range that does not correspond to the number of pages in the incoming document (e.g., processing pages 10-20 for a three-page document), then the file will go out on error.

- Using the **Left** and **Top** fields, you can configure the location of the zone by entering pixels, inches, or millimeters measurements.
- Using the **Height** and **Width** fields, you can change the size of the zone by entering pixels, inches, or millimeters measurements.

For Subrules

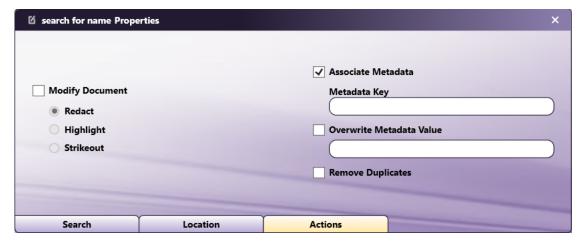


For subrules, you can specify where and when to search and the zone's location/size. Do the following:

- Specify when to search using the **Search At** drop-down list. Options are:
 - First Occurrence Search from the previous rule's zone to the first occurrence of the subrule.
 - Last Occurrence Search from the previous rule's zone to the last occurrence of the subrule.
 - All Occurrences Search from the previous rule's zone to all occurrences of the subrule.
 - Occurrence Number Search from the previous rule's zone to a specific occurrence within the subrule match results. Once you choose this option, a blank field will appear, allowing you to enter a number.
- Configure size and position settings for subrule zones using the Zone Location area or Zone Size area of the Properties panel. Options vary based on zone type, as described below.
 - If the Zone Position is set to "Absolute," the location of the subrule zone will always be at a fixed position. You can do the following:
 - Specify the Top/Left position of the zone using the Top and Left fields.
 - Specify the size of the zone using the Height and Width fields. You can also specify the size of the zone by dragging the zone's boundary box in the Preview area.
 - Customize the measurement units (pixels, inches, or millimeters) used for positioning.
 - You can also drag-drop the zone displayed on the Preview area to its appropriate position and the fields in the Rules Properties panel will change accordingly.
 - If the Zone Position is set to "Above", "After," "Below," or "Before," the subrule's zone is positioned relative to the position of the previous rule's zone. If one of these options is selected, you can do the following:
 - Specify the size of the zone using the **Height** and **Width** fields in the Zone Size area. Customize the measurement units (pixels, inches, or millimeters) used to indicate the zone size. You can also specify the size of the zone by dragging the zone's boundary box in the Preview area.
 - To change the **location** of a relative zone, click and drag it to a new position in the Preview area.

Using the Actions Tab

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Using the Actions tab, you can do the following:

 Select the process to perform on the search results by checking the Modify Document box and then selecting either Redact, Highlight, or Strikeout.

Note: You must check the Associate Metadata box first to enable the Overwrite Metadata Value and Remove Duplicates options.

- Associate metadata with the search results by checking the **Associate Metadata** box. You must also enter an identifying name for the metadata in the **Metadata Key** field. Note that the group name of the metadata will be "forms." For example, if you enter "names" in the Metadata Key field, the metadata can be referenced using the following variable: {forms:names}.
- You can choose to overwrite the metadata value with a hard-coded value by checking the Overwrite Metadata Value box and then entering a
 specific value in the empty box below. This is useful for routing files based on a specific value. For example, if you want to route all files that
 contain redacted text (regardless of the redacted text's value), you could enter a value of "redact" in this field and then set up a Metadata Route
 node to route files that contain a Forms metadata of "redact."
- You can choose to Remove Duplicates. By default, this option is unchecked for new workflows, so all metadata values associated with a
 metadata key are saved. Checking this box will cause the node to save ONLY the first metadata value associated with that metadata key and
 ignore any other values it finds during the OCR process.

Note: The **Remove Duplicates** option is new as of Dispatcher Phoenix 8.9.1. For workflows created before this release, the **Remove Duplicates** box is checked by default (ON) to maintain workflow functionality.

Using the Preview Area

The Preview area displays the rules' bounding boxes on a sample document.

Using the Preview area, you can do the following:

- Resize a rule's bounding box by selecting the bounding box and dragging the appropriate handle(s) until the box is the desired size.
- Reposition a rule by clicking on the bounding box and then dragging the box to its desired position.
- Define your zones on a different sample document by clicking on the Upload icon on the toolbar.

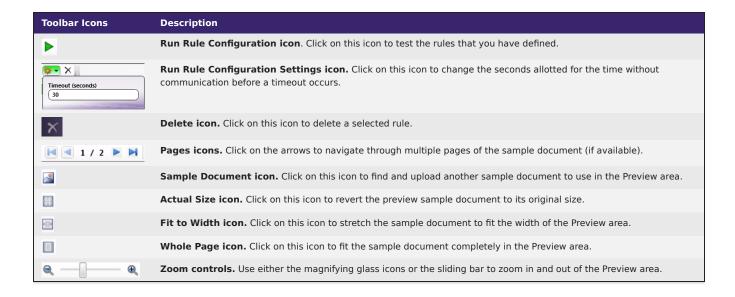
Tip: You can adjust the width and height of the Preview area by clicking and dragging its left and bottom borders.

Using the Toolbar

The toolbar at the top of the window allows you to customize the view of the node properties window.

When using the drop-down palettes on the toolbar, pressing the Enter key or clicking anywhere outside of the palette will apply those changes to the zone.

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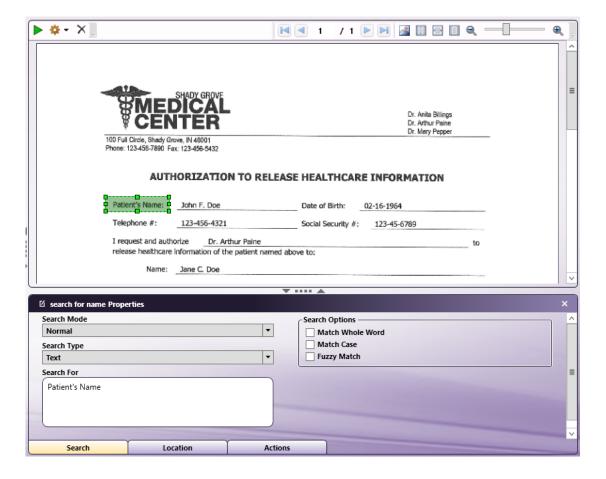
Searching for Static Text

To search for static text in a document, do the following:

- 1. Select Normal from the Search Mode drop-down list.
- 2. Select Text from the Search Type drop-down list.
- 3. Enter the static text to search for in the Search For field.
- 4. You can further refine your search by choosing the following **Search Options**:
 - Match Whole Word Check this box to search for complete words (not words that merely contain what you've specified).
 - Match Case Check this box if capitalization matters during your search operation.
 - Fuzzy Match Check this box to search for words or text strings that either match or come close to matching what you entered. This option is provided to compensate for any OCR errors.

In the following illustration, "Patient's Name" is being searched for:

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Searching for Barcodes

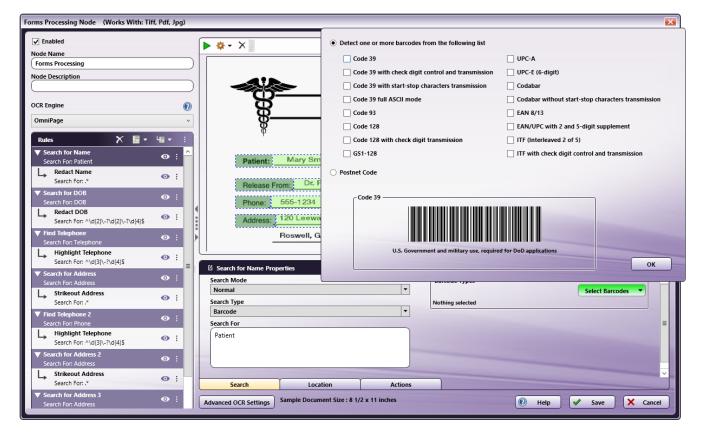
You can search for barcode values in a document using Normal, Regular Expression, or Pattern Searches.

Note: The TesseractOCR engine does not support this functionality.

Once you have chosen your Search Mode, do the following:

- 1. Select **Barcode** from the **Search Type** drop-down list.
- 2. Select the **Select Barcodes** button to choose the type of barcode to search for from the pop-up screen that appears. Check a box next to the barcode that you are interested in; then select the **OK** button. See the following illustration for an example:

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When searching for barcode values, the barcode will be treated as a single entity.

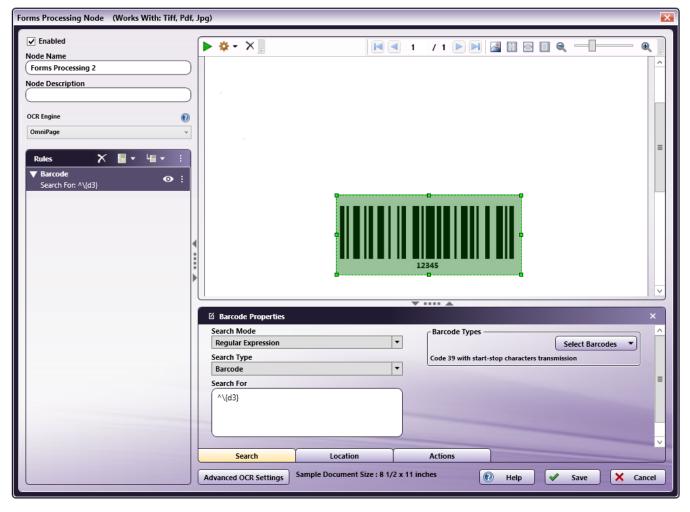
For example, if you set up a Regular Expression search that matches part of the barcode value, the entire barcode value will be processed (redacted/highlighted/strikeout) and extracted as metadata, as a result.

In the following example, a barcode value is '12345'. A regular expression search is set up to find '123', redact the barcode, and extract the barcode value as metadata. In this case, the entire barcode will be redacted and the metadata value for the barcode will be returned as '12345'.

See the following illustrations:

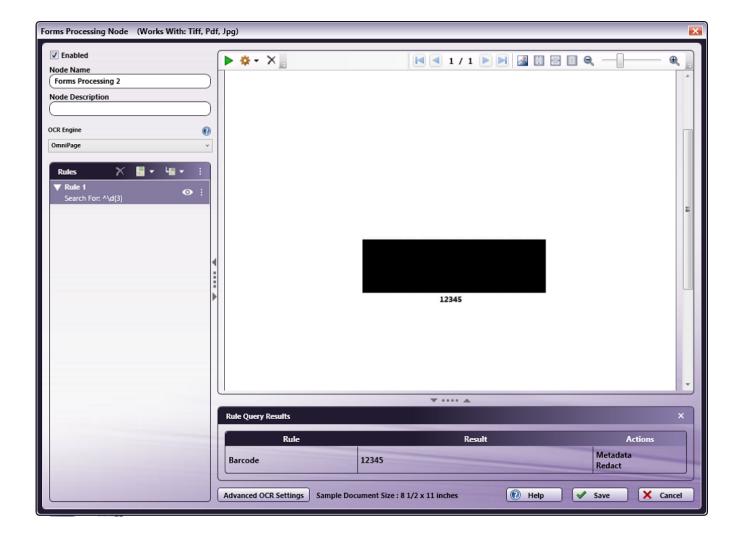
Barcode Search Rule Configuration:

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Result:

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Searching Using Regular Expressions

To use regular expressions in your search, do the following:

- 1. Select Regular Expression from the Search Mode drop-down list.
- 2. Select Text or Barcode from the Search Type drop-down list.
- 3. Enter the regular expression to use in the **Search For** field.

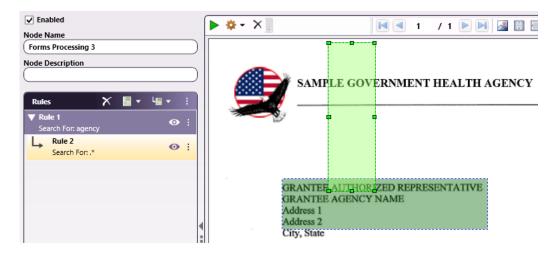
Changing the Search Criteria

In some cases, you may decide to change the search criteria for a rule or subrule to search for content that is located in a **different position** in your document. In this scenario, if you change the search criteria for a rule or subrule that precedes other subrules in the Rules List area and wish to detect content whose position aligns with content identified by the new search critera, you'll need to either:

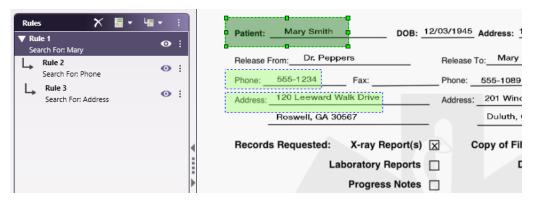
- re-create the subrules located under the rule or subrule for which the search criteria were changed; or
- manually resize and/or re-position the zones of the subrules below the rule or subrule for which the search criteria were changed.

For example, in the below image, Rule 1 is configured to search for the word "agency," and Rule 2 is configured to search for everything above this term. If the search term for Rule 1 is changed to "representative," Rule 2 would either need to be re-created or manually re-positioned in order to detect content located above the new search criteria.

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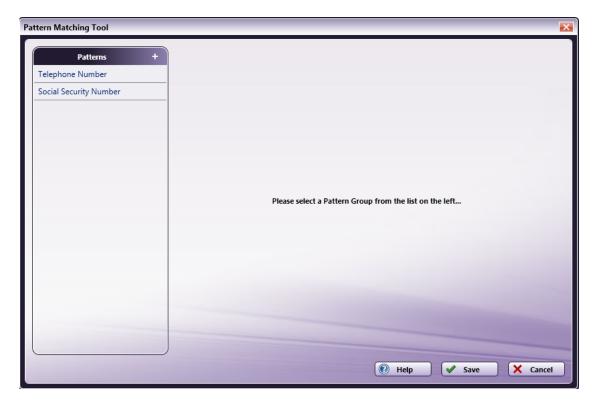
Note: if you change the search criteria for a rule or subrule that precedes other subrules with zones whose positions **don't** need to align with content that the search identifies, then you don't need to re-create or re-position the zones associated with these subrules. For example, in the configuration below, if you change Rule 1 to search for "Smith" rather than "Mary," you can continue to use Rule 2 and Rule 3 to detect "Phone" and "Address," if their zones don't need to specifically line up with the word "Smith."



Using the Pattern Matching Tool

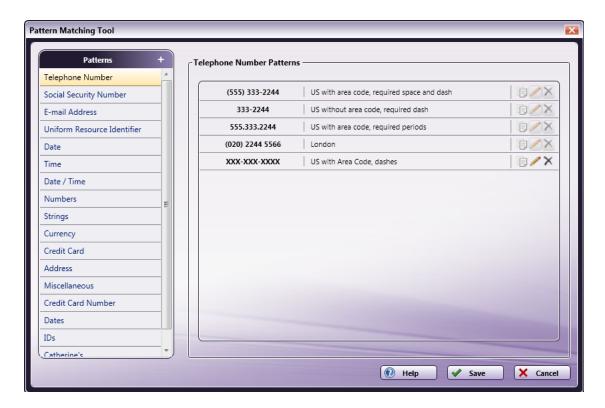
To use patterns in your advanced search, choose **Pattern** from the **Search Mode** drop-down list; then select the **Add/Edit Pattern** button in the Pattern Details area. The Pattern Matching Tool opens, as in the following illustration:

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On the Pattern Matching Tool, groups of predefined patterns are listed on the left-hand side of the window. You can do the following:

• To view the patterns within each group, select a specific category. The patterns will appear on the right hand side of the window. For an example, Telephone Number Patterns may resemble the following illustration:



- To add a pattern to the Forms Processing node, do the following:
 - Select a category from the **Patterns** list in the Pattern Matching Tool.
 - Check the box next to the pattern that you are interested in.
 - Select the **Save** button.

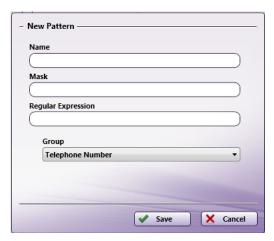
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• The Pattern Matching Tool will close and the regular expression associated with the pattern will appear in the Forms Processing node's **Search For** field, as in the following illustration:



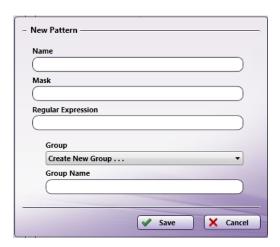
Creating a New Pattern

To create a new pattern, click on the + button in the Patterns area. The New Pattern window will appear, as in the following illustration:



Do the following:

- 1. Select a group for the new pattern using the **Group** drop-down list. If you want to create a new group, select the **Create New Group...** option.
 - a. If you select the Create New Group option, an empty **Group Name** field will appear underneath the **Group** drop-down list, as in the following illustration:



- b. You must enter a name for the new group in the Group Name field. The new group will appear under the Patterns list.
- 2. In the **Name** field, enter identifying text for the new pattern. This will appear in the Pattern Matching Tool window next to the newly created pattern.
- 3. In the **Mask** field, enter the masked characters that make up the new pattern.
- 4. In the **Regular Expression** field, enter the regular expression for the new pattern.
- 5. Select the Save button when you are done.

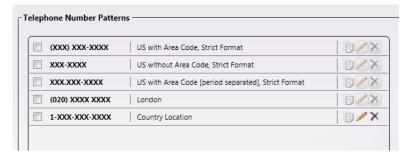
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The new pattern will then appear in Pattern Matching Tool window, categorized under the Group that you specified.

For example, if you want to create a pattern that searches for Telephone Numbers with the following format: (1) – XXX-XXX-XXXX, you could do the following:

- 1. Click the Add New Pattern icon to open the New Pattern window.
- 2. Choose Telephone Number from the **Group** drop-down list.
- 3. Enter a description for the new pattern in the **Description** field (i.e., Country Location).
- 4. Enter 1-XXX-XXX-XXXX in the Mask field
- 5. Enter 1- $\d{3}-\d{3}$ - $\d{4}$ in the **Regular Expression** field.
- 6. Select the **Save** button.

The new pattern would then be added to the Telephone Number patterns, as in the following illustration:



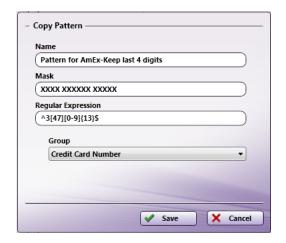
Working with Patterns

Each pattern listed in the Pattern Matching Tool window include copy, edit, and delete icons. Patterns that come standard with the application can only be copied (not edited or deleted). However, you can copy, edit, or delete patterns that you have created. See the following illustration:



Copying Patterns

To copy patterns, click on the **Copy Pattern** icon next to the pattern you are interested in copying. The Copy Pattern window will appear, as in the following illustration:

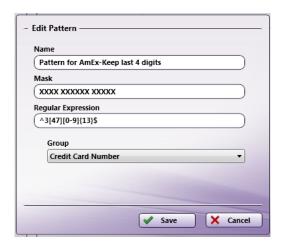


On this screen, you can modify the Group that the pattern is associated with, its name, mask and regular expression. When you are done, select the **Save** button. A copy of the original pattern will automatically appear at the end of the list in the Pattern Matching window.

Editing Patterns

To edit a pattern that you have created, click on the **Edit Pattern** icon next to the pattern you are interested in editing. The Edit Pattern window will appear, as in the following illustration:

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On this screen, you can change the Group that the pattern is associated with, its name, mask and regular expression. When you are done, select the **Save** button. The edited pattern will automatically appear at the end of the list in the Pattern Matching window.

Deleting Patterns

To delete a pattern that you have created, click on the **Delete Pattern** icon next to the pattern you are interested in removing. A message will appear, asking you to confirm the delete operation.

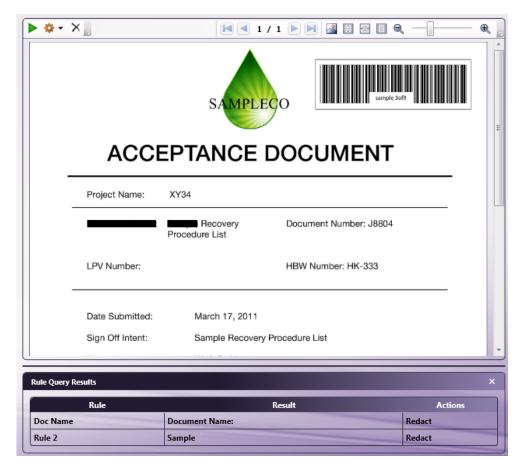
Running Rule Configuration

The Forms Processing node enables you to test rules and subrules you create before running your workflow—you can either choose to test all rules in the Rules List area, or a subset of rules that you select.

Testing All Rules

To test all rules, you can select the Rule Configuration button on the toolbar to see the results of your process. The Rule Query Results panel will appear at the bottom of the page, as in the following illustration:

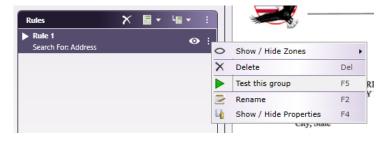
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Note: Running the Rule Configuration will return results for the current page being viewed only.

Testing a Specific Group of Rules

To test only a specific group of rules, right-click the base rule of the group in the Rules List area and select "**Test this group**," as shown below. You can also access the menu shown by clicking the icon to the right of the name of the base rule, or by pressing the **F5** key on your keyboard:



This action tests the base rule and all of its associated subrules—the results of the test will appear in the Preview area in a similar format to the example shown in the previous section for testing all rules configured in the node.

Regular Expression Examples

Matching Regular Expression

Email Addresses

To match an email, such as john@doe.com, the regular expression should be set up to match one or more lowercase letters, numbers, underscores, dots, or hyphens, following by the @ sign, and a domain name that can contain one or more lowercase letters, numbers, underscores, dots, or hyphens.

^([a-z0-9_\.-]+)@([\a-z0-9_\.-]+)\.([a-z\.]{2,6})\$

Where:

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^ indicates the beginning of the line

[a-z0-9_\.-] matches letters, numbers, underscores, dots, or hyphens in the user name or domain name

- + indicates one or more @ is the symbol that appears in every email address prior to the domain name
- . is the symbol that appears before the domain name extension

[a-z\.] matches letters or dots

{2,6} indicates 2 to 6 letters are allowed

\$ indicates the end of the line

For example: ^([a-z0-9_\.-]+)@([\da-z\.-]+)\.([a-z\.]{2,6})\$

Matches: john@doe.com

User Names

To match a user name, the regular expression should be set up to match letters, numbers, underscores, or hyphens.

For example:

/^[a-z0-9_-]{3,16}\$

Where:

^ indicates the beginning of the line

[a-z0-9_-] matches letters, numbers, underscores or hyphens

{3,16} indicates that there should be at least 3 of those characters but no more than 16

\$ indicates the end of the line

Matches my-us3r-n4m3

Credit Card Numbers

Credit cards adhere to a basic numbering scheme, which is an opening digit sequence followed by a specific number of digits. For example, MasterCard numbers are 16 digits, with the first digit always set at "5" and the second digit being between 1-5.

For example:

5[1-5]\d{14}

Where:

5 is the first digit

[1-5] matches a digit that is from 1 through 5

d{ 14} matches the next 14 digits.

Matches: 5212345678901234

Doc-Classifier



Doc-Classifier

Use the Doc-Classifier node to automatically categorize scanned documents, electronic files, etc., into pre-defined classes using Dispatcher Phoenix's Optical Character Recognition (OCR) capability. The node extracts information, matches it against pre-defined classification definitions, and produces the following metadata values:

- Classification The detected Classification Type or, if not detected, "other".
- Confidence Level A percentage rating indicating the probability the document was classified correctly.

Other processing nodes in the workflow can then use the metadata for processing/routing the files. This node replaces the process of manually categorizing and distributing documents.

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The Doc-Classifier node includes many pre-defined Classification Categories such as birth certificates, loan applications, and purchase orders. The categories contain keyword-based rules to extract information and produce metadata outputs of classification and confidence level information. However, the actual forms within the Classification Categories are hidden. That is, you can select categories for use but you cannot modify them.

This node works with the following file types:

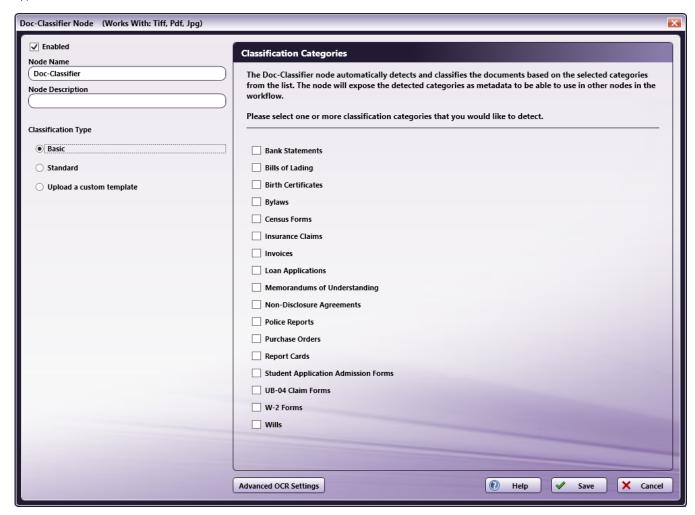
- TIFF
- JPG
- PDF

Notes:

- The Doc-Classifier node only supports files with a resolution of 300 dpi.
- The node does not permit any additional processing actions such as Highlight/Strikeout or Redact.
- The node collects data for which you can generate reports using the **Dispatcher Phoenix Web Report Generator Tool**.
- The node includes the OmniPage OCR engine.

Configuring the Doc-Classifier Node

To open the Doc-Classifier node, drag-drop the node from the Process list into a workflow and double-click on the node. The Properties window appears:



- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

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Buttons

- Advanced OCR Settings To access the OCR Settings window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Classification Type

For each Doc-Classifier node you add to a workflow, you must select a Classification Type. Each type applies a distinct detection method to imaged documents. Choose one of following options:

- Basic The "full-page" option, this Classification Type applies OCR zones to the entire page area and searches for keywords defined in the Classification Categories you select for the node. The search looks for the first keyword and, if found, searches for other document classification qualifiers via the full-page zones.
- **Standard** The "template-based" option, this Classification Type applies pre-defined templates to search for keywords defined in the Classification Categories you select for the node. Each template contains a set of OCR zones, rules, sub-rules, and regular expressions.
- **Upload a custom template** If the above detection methods do not adequately extract the information required to classify a particular document type, you can request the Solutions Engineering Center (SEC) to create a custom template for use with the document type. You use this option to apply the custom template to the node. For more information, contact SEC.

Note: Classification Types are constantly being refined and updated. When you select a Classification Type, if multiple template versions exist, a drop-down menu appears listing the available versions. Select the version you want to use. The default option is the most recent version, and the templates list in reverse-chronological order.

About Classification Types

- · All Classification Types create metadata. However, only the Standard type creates the Confidence Level metadata type.
- · When a keyword is not detected in a document, metadata is created to classify the document as Other.
- While you can apply only one Classification Type to a Doc-Classifier node, you can configure another Doc-Classifier node, apply a different Classification Type, and add it to the workflow. By setting up two nodes in one workflow, you can run additional classification processes as a check

Classification Categories

Each Classification Category contains a template that was created based on a sampling of documents associated with that category. For example, the template in the Purchase Order category was constructed based on a sampling of actual purchase orders. Each template contains a set of OCR zones, rules, sub-rules, and regular expressions. The template uses these elements to search for keywords in the scanned documents and classifies the documents based on the keywords detected (or not detected).

In addition, for each document scanned, the template calculates a "confidence level" and generates metadata based on that level. Basically, the greater the number of OCR zones in the category that detect the keyword, the higher the confidence level. You can then route documents in the workflow based on the confidence level.

Once you select a Classification Type, the Classification Categories area populates with available categories. Select one or more categories by which to classify documents in the workflow. Classification Categories are constantly being refined and new categories added. The following categories are currently available:

Category	Category
Bank Statements	Non-Disclosure Agreements
Bills of Lading	Police Reports
Birth Certificates	Purchase Orders
Bylaws	Report Cards
Census Forms	Student Application Admission Forms
Insurance Claims	UB-04 Claim Forms
Invoices	W-2 Forms
Loan Applications	Wills
Memorandums of Understanding	

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Confidence Level

To help you route documents accurately and with confidence, each Classification Category generates a confidence level - a percentage rating indicating the confidence level that the document was classified correctly. Keywords detected by a Classification Category produce confidence-level metadata, and you can then route documents based on the confidence level. For example, you can choose to route all documents that meet or exceed a confidence level of 90 to the selected Classification Category, and route all documents not exceeding 90 to the "Other" category where they can be reviewed and re-classified.

Each Classification Category consists of one or more search rules, and each rule applies an OCR zone used to detect the content in a specified area of the document. The greater the number of rules a Classification Category contains, and the more keywords the rules in those zones detect, the higher the confidence that the document was classified correctly.

Notes:

- Confidence levels are used only in the Classification Categories in the Standard Classification Type, and not in the Basic Classification Type.
- If multiple Classification Types are detected, a confidence level is produced for each and the document is routed to the highest level detected.
- To view the confidence level found for a classified document, you must add a **Metadata to File** node to the workflow and view the metadata section of the file generated by the workflow. See the workflow example 2 below.

Metadata

The following metadata is created in the Doc-Classifier node:

Metadata	Description
{sdc:classification}	Document-level metadata containing values for each Classification Category found.
{sdc:confidence}	Document-level metadata containing a confidence level (that is, a percentage rating indicating the confidence level that the document was classified correctly) for each Classification Category found.

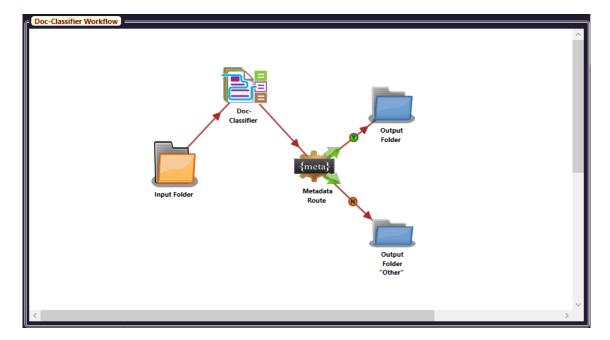
Note: The Doc-Classifier node creates only document-level metadata.

Sample Workflow 1

The following is a typical Doc-Classifier workflow to route documents by Classification Category:

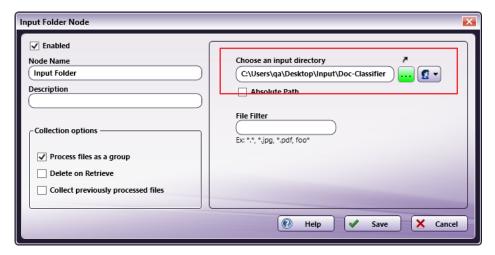
- 1. Collect documents from an input folder.
- 2. Process the documents against user-defined Doc-Classifier categories.
- 3. Output the document categories as metadata and send the metadata to the **Metadata Route** node.
- 4. Distribute all classified documents to an output folder.
- 5. Distribute all un-classified documents to another output folder.

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Step 1 - Add an Input Folder

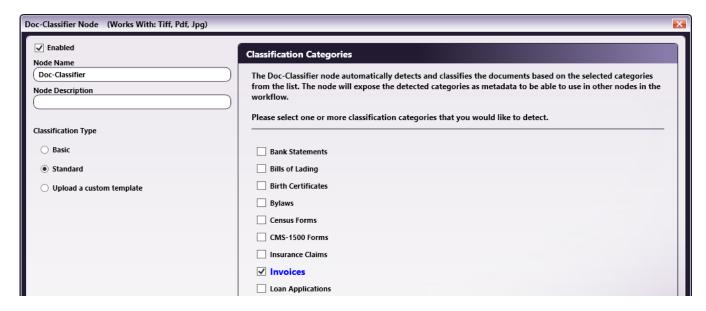
Add an Input Folder to the workflow and specify the input directory to be the folder containing the documents to classify.



Step 2 - Configure the Doc-Classifier Node

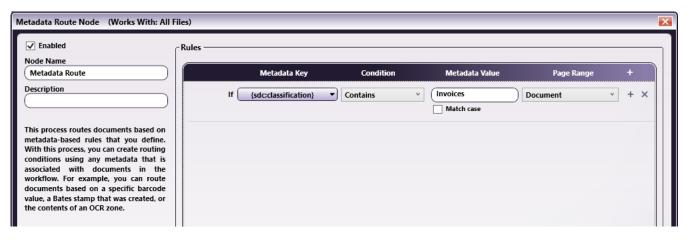
Add a Doc-Classifier node to the workflow. Select a Classification Type and one or more Classification Categories.

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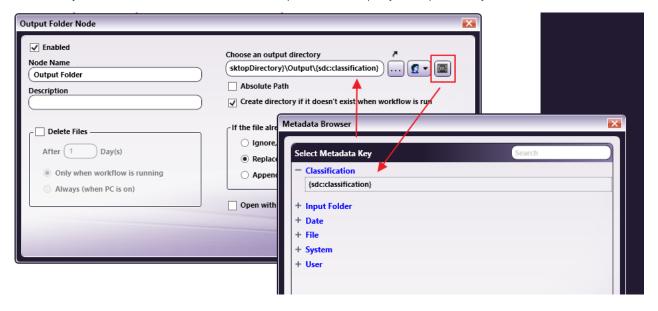
Step 3 - Configure the Metadata Route Node

Add a **Metadata Route** node to the workflow and configure it as in the following illustration:



Step 4 - Configure the Output Folders

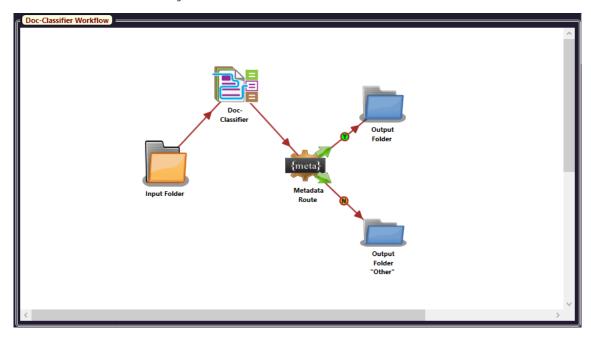
Add two Output Folder nodes to the workflow. For each Output Folder node, specify the output directory to be created based on the metadata.



Step 5 - Connect the Nodes in the Workflow

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Connect the nodes as in the following illustration:



Step 6 - Run the Workflow

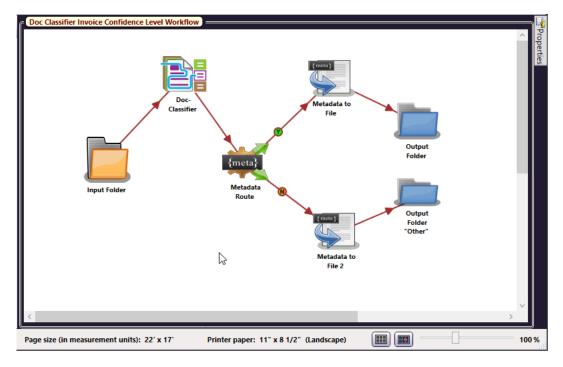
Run the workflow. The Doc-Classifier node creates classification metadata for all documents in the Input folder. All invoices are distributed to a named folder. All other documents are distributed to a folder called **Other**.

Sample Workflow 2

The following is a typical Doc-Classifier workflow designed to route documents by confidence level:

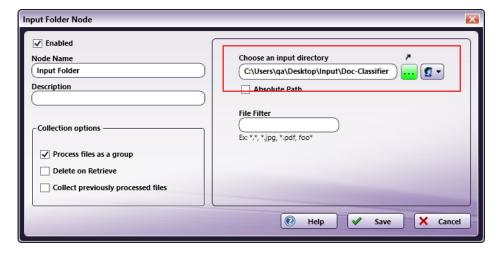
- 1. Collect documents from an input folder.
- 2. Process the documents against user-defined Doc-Classifier categories.
- 3. Output the document categories as metadata and send the metadata to the **Metadata Route** node.
- 4. Add two Metadata to File nodes to collect metadata in files for viewing.
- 5. Distribute all classified documents meeting a specified confidence level to an output folder.
- 6. Distribute all un-classified documents and all classified documents not meeting a specified confidence level to another output folder.

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Step 1 - Add an Input Folder

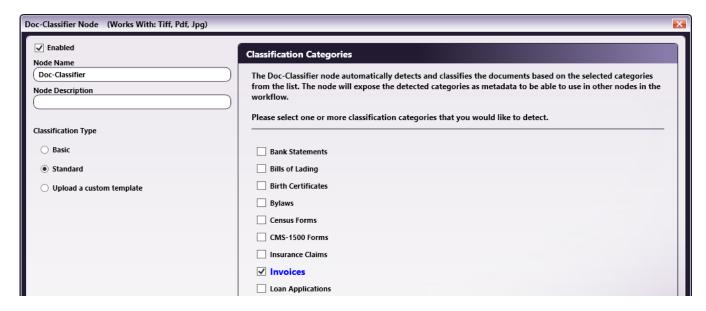
Add an Input Folder to the workflow and specify the folder containing the documents to classify as the input directory.



Step 2 - Configure the Doc-Classifier Node

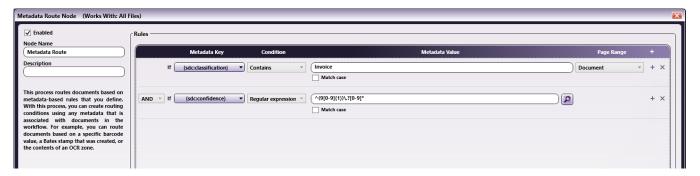
Add a Doc-Classifier node to the workflow. Select a Classification Type and one or more Classification Categories.

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Step 3 - Configure the Metadata Route Node

Add a **Metadata Route** node to the workflow and configure it as in the following illustration. In this example, the Confidence metadata expression will route all documents whose confidence level is greater than or equal to 90 to the detected category, and route all other documents to the "Other" folder.



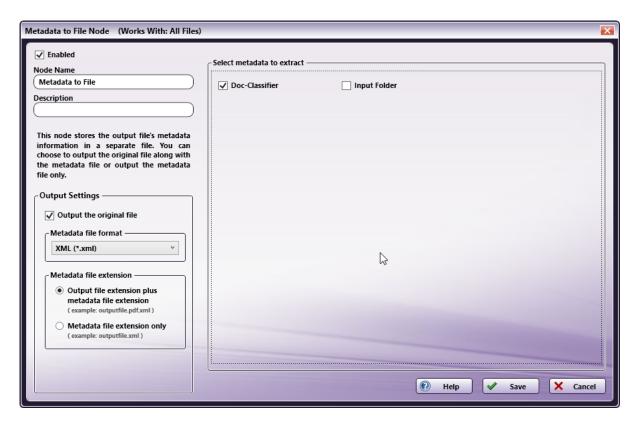
The following expressions can be used to route documents whose confidence level is greater than or equal to the confidence level indicated in the table below:

Confidence Level	Expression
Confidence >= 60	^(6[0-9]{1} [7-9]{1}[0-9]{1})\.?[0-9]*
Confidence >= 65	^(6[5-9]{1} [7-9]{1}[0-9]{1})\.?[0-9]*
Confidence >= 70	^(7[0-9]{1} [8-9]{1}[0-9]{1})\.?[0-9]*
Confidence >= 75	^(7[5-9]{1} [8-9]{1}[0-9]{1})\.?[0-9]*
Confidence >= 80	^(8[0-9]{1} 9[0-9]{1})\.?[0-9]*
Confidence >= 85	^(8[5-9]{1} 9[0-9]{1})\.?[0-9]*
Confidence >= 90	^(9[0-9]{1})\.?[0-9]*
Confidence >= 95	^(9[5-9]{1})\.?[0-9]*

Step 4 - Configure the Metadata to File Nodes

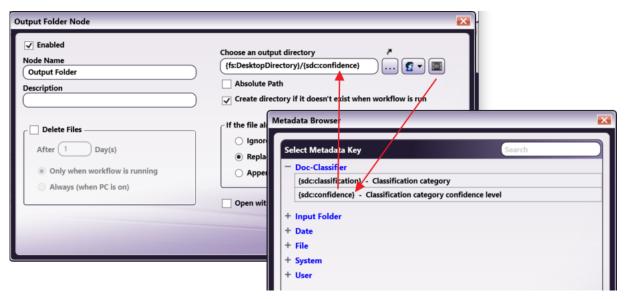
Add two Metadata to File nodes to the workflow. For each Metadata to File node, select the Doc-Classifier option as the metadata to extract.

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Step 5 - Configure the Output Folders

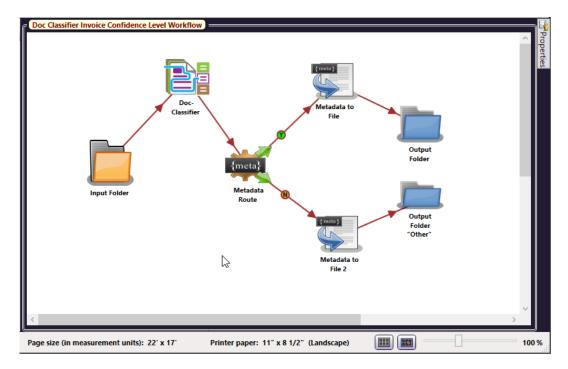
Add two Output Folder nodes to the workflow. For each Output Folder node, specify the output directory to be created based on the metadata.



Step 6 - Connect the Nodes in the Workflow

Connect the nodes as in the following illustration:

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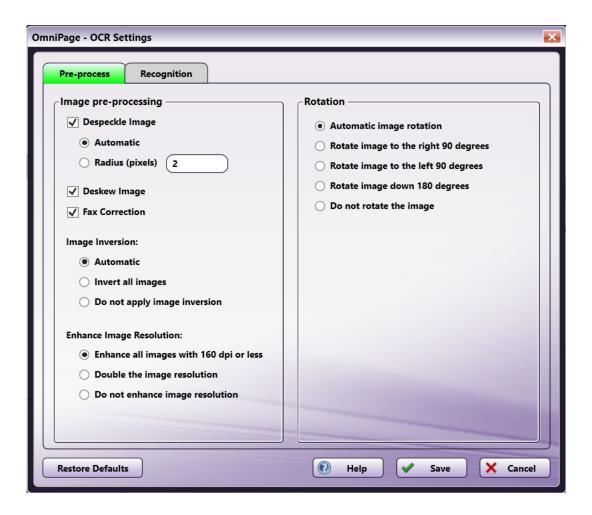
Step 7 - Run the Workflow

Run the workflow. The Doc-Classifier node creates Confidence metadata for all documents in the Input folder. All invoices meeting the Confidence criterion are distributed to a named folder. All other documents are distributed to a folder called **Other**.

OCR and Barcode Settings

This topic describes the OCR Settings window. This window is available in Dispatcher Phoenix nodes that support optical character recognition (OCR). These nodes contain the **Advanced Settings** button (sometimes called the **Advanced OCR Settings** button), which accesses the OCR Settings window. See the illustration below:

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Note: This page primarily applies to Tesseract and OmniPage. Settings for the ZXing barcode engine are explained below.

OCR Engines

Optical character recognition is driven by an OCR engine. Dispatcher Phoenix currently supports the following OCR engines:

- Tesseract
- OmniPage

Each OCR-capable node supports one or more OCR engines. If the node supports only one OCR engine, that engine defaults. For nodes that default to Tesseract, the OCR Engine field in the node's Properties window displays "Tesseract". However, for nodes that do not support Tesseract, OmniPage defaults but the OCR Engine field does not display "OmniPage".

If the node supports multiple engines, and you have licensed multiple engines, the **OCR Engine** field in the node includes a drop-down menu and you can select an engine.

When you access the OCR Settings window, the set of options that is available is determined by the OCR engine, based on the functional capabilities of the engine.

Note: For OCR-capable nodes, the OCR engine can also affect the list of output options that are available at the Output field in the node's Properties window.

OCR-Capable Nodes

The following Dispatcher Phoenix process nodes are equipped with OCR capability:

- 2D Barcode Processing
- Advanced OCR
- · Barcode Processing
- Convert to PDF
- Convert to Office

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- Doc-Classifier
- Forms Processing
- · Highlight/Strikeout
- Redact

OmniPage Nodes

All OCR-capable nodes support the OmniPage OCR engine. These nodes must be purchased as add-in nodes to the Dispatcher Phoenix base license or as part of a Dispatcher Phoenix vertical market package, with the following exceptions:

- Advanced OCR Advanced OCR is included in the Dispatcher Phoenix base license. It includes support for the Tesseract and OmniPage.
 OmniPage for Advanced OCR is available as a separate purchase.
- Convert to PDF Convert to PDF is included in the Dispatcher Phoenix base license. It includes support for Tesseract. OmniPage for Convert to PDF is available as a separate purchase.

Important! When using the OmniPage OCR engine to scan languages other than English, optimal results are returned when scanned strings contain 3 or more characters and each character is between 30x30 and 48x48 px.

All barcode-capable nodes support the OmniPage barcode engine:

- 2D Barcode Processing 2D Barcode Processing is included in the Dispatcher Phoenix base license with the ZXing barcode engine. 2D Barcode Processing with OmniPage is available as an add-in node.
- Barcode Processing Barcode Processing is included in the Dispatcher Phoenix base license with the ZXing barcode engine. Barcode Processing with OmniPage is available as an add-in node.

Tesseract Nodes

The following nodes support the Tesseract OCR engine:

- Advanced OCR Advanced OCR is included in the Dispatcher Phoenix base license. It includes support for Tesseract.
- Convert to PDF Convert to PDF is included in the Dispatcher Phoenix base license. It includes support for Tesseract.
- Forms Processing A purchase of the Forms Processing node includes support for the Tesseract and OmniPage.

Note: The Tesseract OCR engine includes an option to install additional languages for use in the OCR recognition process. These additional languages are included in the Tesseract OCR engine and require no additional licenses or purchases.

Multiple OCR Engine Nodes

This section contains a table for each Dispatcher Phoenix node that supports both the OmniPage and Tesseract OCR engines. The table lists the Dispatcher Phoenix functions and features supported by each OCR engine.

Advanced OCR Node - OCR Functionality Table

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OCR Feature/Function	OmniPage	Tesseract
Autozone	Yes	Yes
Page Range to Process	Every page Every even page Every odd page First page Last page Define your own page range	Every page Every even page Every odd page First page Last page Define your own page range
Output	Original document + Metadata PDF PDF Searchable PDF with image substitutes Microsoft Word 2000 XP (*.doc) Microsoft Word 2003 (WordML) Microsoft Word 2003 XP (*.xls) Microsoft Powerpoint 97 (*.ppt) XPS Searchable RTF Word 2000 Text Comma Separated Text Formatted Text Text with linebreaks Unicode Text Unicode Formatted Text Unicode Text with linebreaks XML eBook	Original document + Metadata PDF Searchable Text Comma Separated Text Text with linebreaks Unicode Text Unicode Comma Separated Text Unicode Text with linebreaks
Advanced Settings	Yes	Yes
Pre-Process	Despeckle Deskew Fax Correction image Inversion Enhanced Image Resolution Rotation	Deskew Rotation
Recognition	127 Languages 9 Dictionaries Spell Check Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Sipreadsheet - Form - Legal Pleading Optimize OCR process Specify maximum image size Timeout	113 Languages Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Spreadsheet Optimize OCR process Specify maximum image size Timeout
OCR Settings Output	Output formatting level Retain filled form data Retain inverted text Retain text and background color Blank page removal Unrecognized character substitution	None

Convert to PDF - OCR Functionality Table

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OCR Feature/Function	OmniPage	Tesseract
File Type	PDF PDF edited PDF Image Only PDF Searchable PDF with image substitutes	PDF Searchable PDF image only
PDF Version	Optimize for Quality Optimize for Size PDF 1.3 PDF 1.4 PDF 1.5 PDF 1.6 PDF 1.7 PDF/A-1a PDF/A-2a PDF/A-3a PDF/A-3b PDF/A-2b PDF/A-3b PDF/A-2u PDF/A-3u	None
Remove Blank Pages	Yes	Yes
Auto-Rotate	Yes	Yes
Security Settings	Yes	Yes
Advanced Settings	Yes	Yes
Pre-Process	Despeckle Deskew Fax Correction image Inversion Enhanced Image Resolution Rotation	Deskew Rotation
Recognition	127 Languages 9 Dictionaries Spell Check Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Spreadsheet - Form - Legal Pleading Optimize OCR process Specify maximum image size Timeout	113 Languages Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Spreadsheet Optimize OCR process Specify maximum image size Timeout
OCR Settings Output	Output formatting level Retain filled form data Retain inverted text Retain text and background color Blank page removal Unrecognized character substitution	Blank page removal

Forms Processing - OCR Functionality Table

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OCR Feature/Function	OmniPage	Tesseract
Run Rule Configuration	Yes	Yes
Advanced Settings	Yes	Yes
Pre-Process	Despeckle Deskew Fax Correction image Inversion Enhanced Image Resolution Rotation	Deskew Rotation
Recognition	127 Languages 9 Dictionaries Spell Check Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Spreadsheet - Form - Legal Pleading Optimize OCR process Specify maximum image size Timeout	113 Languages Layout Description: - Automatic - Single Column, no Table - Multiple Columns, no Table - Single Column with Table - Spreadsheet Optimize OCR process Specify maximum image size Timeout

Using the Advanced OCR Settings Window

The Advanced OCR Settings window contains settings you can use to adjust the accuracy of the OCR results as well as the performance time of the OCR process.

The Advanced OCR Settings window contains the following tabs, each with a set of related settings. You can specify settings for:

- Pre-processing
- · OCR recognition
- Output format (this tab appears only for nodes that convert documents to another format)

Buttons

The following buttons are available from each tab in the OCR Settings window:

- Restore Defaults To reset all customized settings to their default values, click this button.
- $\mbox{\bf Help}$ To access Online Help for this window, click this button.
- Save To preserve the current OCR Settings, click this button.
- Cancel To exit the OCR Settings window without saving any changes and return to the node properties window, click this button.

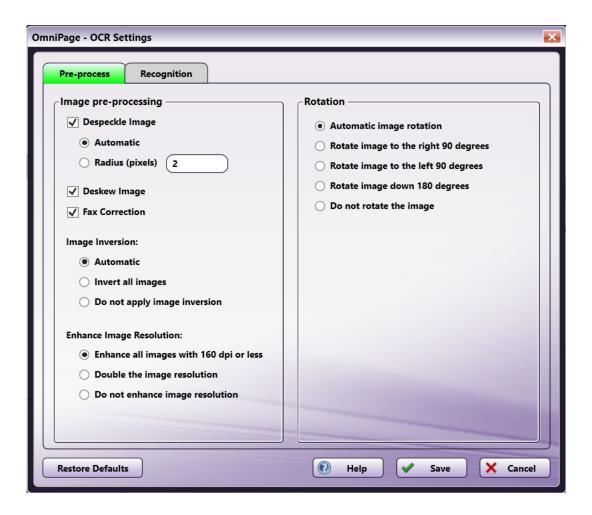
Pre-process Tab

Use this tab to set parameters specifying how to prepare and pre-process images before OCR analysis and recognition begins.

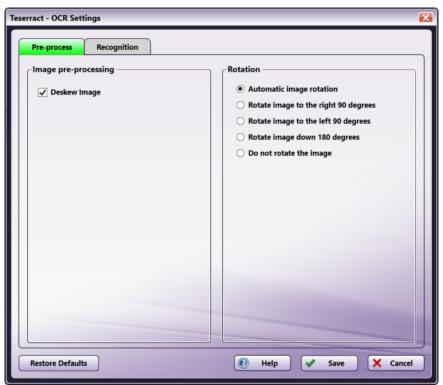
Note: The set of options available on this tab is determined by the **OCR engine**, based on the functional capabilities of the engine. If an option does not appear in the tab, it is not supported by the OCR engine. The illustrations below show the options available for the OmniPage and Tesseract OCR engines. All options are described in the section below the illustrations.

OmniPage Options

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Tesseract Options



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Image Pre-processing

Pre-processing procedures can be applied to images to enhance their quality before OCR recognition is performed. Enabling or disabling these options may improve the quality of your output and/or the performance time of the OCR process.

- **Despeckle Image** When this setting is enabled, images are automatically despeckled for OCR purposes during the preparation process. Although the OCR process tolerates low quality images, any spots or smudges should be removed from images for best results. Despeckle looks for "noise" on a scanned image and removes it. The default value is enabled.
 - · Automatic When this setting is enabled, the OCR engine automatically selects the pixel radius for despeckling.
 - Radius (Pixels) When this setting is enabled, the user sets the pixel radius that the OCR engine uses for despeckling.

Note: This option is only available for the 2D Barcode Processing, Advanced OCR, Barcode Processing, Convert to PDF, and Forms Processing nodes. This option is not available for the Convert to Office, Doc-Classifier, Highlight & Strikeout, and Redact nodes.

- Deskew Image When this setting is enabled, images that have been scanned in crookedly are automatically straightened during the
 preparation process. The default value is enabled.
- Fax correction When this setting is enabled, the resolution of faxed images will be doubled. The default value is enabled.

Note: Turning off the pre-processing options **Despeckle Image**, **Deskew Image**, or **Fax Correction** may cause the OCR process to fail. If you turn off these options, you may need to add the Despeckle and/or Deskew nodes to the workflow so that the document can be properly processed.

- Image Inversion Before performing OCR, images with white text against a dark background can be temporarily inverted during the preparation process to increase the accuracy of the OCR results. Options can be:
 - **Automatic** When this setting is enabled, the need for image inversion is detected and inversion is performed during pre-processing. *This enabled option is the default value.*
 - Invert all images When this setting is enabled, all images are automatically inverted, skipping the detection step.
 - **Do not apply image inversion** When this setting is enabled, incoming images are not inverted before the OCR process begins. Note that the accuracy of the OCR results may be affected with this option enabled.
- Enhance Image Resolution The resolution of incoming images can be temporarily enhanced during the preparation process to improve the accuracy of the OCR process. Options are:
 - Enhance all images with 160 dpi or less When this setting is enabled, image resolutions are detected and doubled if 160 dpi or less. This enabled option is the default value.
 - Double the image resolution When this setting is enabled, the image resolution is automatically doubled, skipping the detection step.
 - **Do not enhance image resolution** When this setting is enabled, the original image resolution will not change. Note that the accuracy of the OCR results may be affected with this option enabled.

Rotation

Before performing OCR, the application tries to detect and correct incorrectly oriented pages. If you already know the exact misalignment of incoming files and want to speed up processing time by avoiding this auto-detection process, you can choose specific options here.

- Automatic image rotation When this setting is enabled, the orientation of incoming images is detected and improperly oriented page images
 are automatically rotated (by 90, 180, or 270 degrees) before OCR takes place. This enabled option is the default value for rotation and
 mirroring; if you uncheck this box, the Auto-Rotate option on the process node window will also be unchecked.
- Rotate image to the right 90 degrees When this setting is enabled, improperly oriented page images are rotated by 90 degrees, clockwise.
- Rotate image to the left 90 degrees When this setting is enabled, improperly oriented page images are rotated by 90 degrees, counter-clockwise.
- Rotate image down 180 degrees When this setting is enabled, improperly oriented page images are turned upside down.
- Do not rotate the image When this setting is enabled, the image is not rotated.

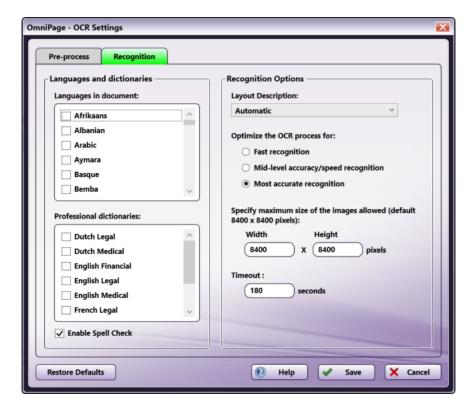
Recognition Tab

To improve OCR accuracy and processing time, you can specify specific settings to assist in the recognition process.

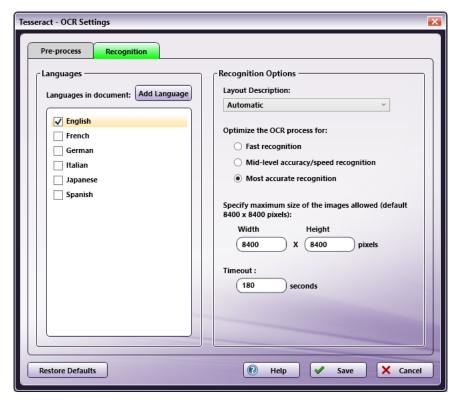
Note: The set of options available on this tab is determined by the **OCR engine**, based on the functional capabilities of the engine. If an option does not appear in the tab, it is not supported by the OCR engine. The illustrations below show the options available for the OmniPage and Tesseract OCR engines. All options, including the available languages for each OCR engine, are described in sections below the illustrations.

OmniPage Options

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Tesseract Options



Languages and dictionaries

• Languages in document - This window displays all languages currently loaded into your system. Check the box next to the languages you want to include in the OCR recognition process. You can select multiple languages, but you must select at least one. The default setting at this field reflects the default language for your operating system.

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- Add Languages This option appears only for the Tesseract OCR engine. The default Tesseract languages appear in the Languages in document window. To include other languages in the Tesseract OCR recognition process, click this button. The Add Language window appears. Check the box next to the languages you want to include, and click the Install button. You can install up to five languages at one time. When the installation is complete, the selected languages appear in the Languages in Document window.
- **Professional dictionaries** This panel appears only for the OmniPage OCR engine. It lists the available professional dictionaries. You can select multiple dictionaries. Check the box next to the dictionaries you want to use during the OmniPage OCR recognition process. The following table lists the available dictionary types and the languages supported for each.

Dictionary	Dutch	English	French	German
Financial	N	Υ	N	N
Legal	Υ	Υ	Υ	Υ
Medical	Υ	Υ	Υ	Υ

• Enable Spell Check - This option is available only for the OmniPage OCR engine. To enable spell checking during OCR recognition, check this box.

If you enable this setting, the spell-checker for OmniPage's OCR engine estimates unrecognizable words (usually on lower resolution scans). Note that spell check estimations do not change the length of the word. For example, 'optica' will not be changed to 'optical.' If you disable this setting, the Professional Dictionaries list becomes inactive and you cannot choose a dictionary.

OmniPage OCR Languages

The following table lists the languages supported by the OmniPage OCR engine:

Language	Language	Language	Language	Language
Afrikaans	Albanian	*Arabic	Aymara	Basque
Bemba	Blackfoot	Breton	Bugotu	Bulgarian (Cyrillic)
Byelorussian (Cyrillic)	Catalan	Chamorro	Chechen (Cyrillic)	Chuana (Tswana)
Corsican	Croatian	Crow	Czech	Danish
Dutch	English	Eskimo	Esperanto	Estonian
Faroese	Fijian	Finnish	French	Frisian
Friulian	Gaelic Irish	Gaelic Scottish	Galician	Ganda or Luganda
German	Greek	Guarani	Hani	Hawaiian
*Hebrew	Hungarian	Icelandic	Ido	Indonesian
Interlingua	Italian	*Japanese	Kabardian (Cyrillic)	Kashubian
Kawa	Kikuyu	Kongo	*Korean	Kpelle
Kurdish	Latin	Latvian	Lithuanian	Luba
Lule Sami	Luxembourgian	Macedonian (Cyrillic)	Malagasy	Malay
Malinke	Maltese	Maori	Mayan	Miao
Minangkabau	Mohawk	Moldavian (Cyrillic)	Nahuatl	Northern Sami
Norwegian	Nyanja	Occidental	Ojibway	Papiamento
Pidgin	Polish	Portuguese	Portuguese (Brazilian)	Provencal
Quechua	Rhaetic	Romanian	Romany	Ruanda
Rundi	Russian (Cyrillic)	Sami	Samoan	Sardinian
Serbian (Cyrillic)	Serbian (Latin)	Shona	*Simplified Chinese	Sioux
Slovak	Slovenian	Somali	Sotho	Southern Sami
Spanish	Sundanese	Swahili	Swazi	Swedish
Tagalog	Tahitian	*Thai	Tinpo	Tongan
*Traditional Chinese	Tun	Turkish	Ukrainian (Cyrillic)	Vietnamese
Visayan	Welsh	Wend	Wolof	Xhosa
Zapotec	Zulu			

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* Requires a purchase and installation of the Asian Font Pack add-in before the language can be activated.

Tesseract OCR Languages

The following table lists the languages supported by the Tesseract OCR engine:

Language	Language	Language	Language	Language
Afrikaans	Albanian	Amharic	Ancient Greek	Arabic
Armenian	Assamese	Azerbaijani	Azerbaijani - Cyrilic	Basque
Belarusian	Bengali	Bosnian	Breton	Bulgarian
Burmese	Catalan	Cebuano	Cherokee	Corsican
Croatian	Czech	Danish	Dutch	Dzongkha
English	Esperanto	Estonian	Faroese	Filipino
Finnish	French	Gaelic Irish	Galician	Georgian
German	Gujarati	Haitian	Hebrew	Hindi
Hungarian	Icelandic	Indonesian	Inuktitut	Italian
Japanese	Javanese	Kannada	Kazakh	Khmer
Korean	Kurmanji	Kyrgyz	Lao	Latvian
Lithuanian	Luxembourgish	Macedonian	Malay	Malayalam
Maltese	Maori	Marathi	Middle English	Middle French
Modern Greek	Mongolian	Nepali	Norwegian	Occitan
Oriya	Pashto	Persian	Polish	Portuguese
Punjabi	Quechua	Romanian	Russian	Sanskrit
Scottish Gaelic	Serbian	Serbian - Latin	Simplified Chinese	Sindhi
Sinhala	Slovak	Slovenian	Spanish	Sundanese
Swahili	Swedish	Syriac	Tajik	Tamil
Tatar	Telugu	Thai	Tibetan	Tigrinya
Tongan	Traditional Chinese	Turkish	Uighur	Ukrainian
Urdu	Uzbek	Uzbek - Cyrilic	Vietnamese	Welsh
Western Frisian	Yiddish	Yoruba		

Recognition Options

To improve recognition of text during the OCR process, you can provide a description of the original document's layout, reflecting how you want the layout to be handled.

Layout Description

- Automatic To auto-detect the layout (e.g., whether text is in columns, etc.), select this option. This option allows for the speediest processing time. This option is useful if:
 - You want to process your documents quickly.
 - $\circ~\mbox{Your documents}$ contain pages with different/unknown layouts.
 - Your documents have pages with multiple columns and a table.
 - $\circ\;$ Your document have pages containing more than one table.

Note: Forms are never automatically detected. To detect OCR forms, select Form as the layout.

- Single Column, no Table Enable this setting if your pages contain any of the following:
 - One column and no tables (e.g., business letters or pages from a book).
 - Words or numbers arranged in columns that should be organized into a single column.
- Multiple Columns, no Table Enable this setting if your pages contain text in columns that should be kept in separate columns, similar to the original layout. If table-like data is detected, it will be placed in columns, not in a gridded table.

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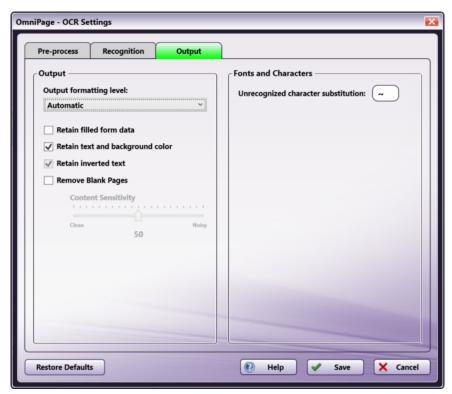
- Single Column with Table Enable this setting if your pages contain only one column of text and a table.
- Spreadsheet Enable this setting if your pages contain a table to be exported to a spreadsheet program or be treated as a table.
- Form Enable this setting if your pages contain forms. Form objects and elements will be detected.
- Legal Pleading Enable this setting if your pages contain legal pleading numbers. Once enabled, the following options will be available:
 - Remove legal pleading numbers Choose this option to remove all pleading numbers from incoming documents.
 - **Retain legal pleading numbers** Choose this option to keep all pleading numbers in incoming documents. In this case, the numbers will be visible, editable, and searchable.
- · Optimize the OCR process for:
 - Fast recognition Enable this setting to optimize the recognition process for speed. Although this setting produces the least accurate results, it can be useful when you know that your incoming documents are of good quality and can yield acceptable, accurate results. With this setting enabled, advanced formatting, such as colored text/background and inverted text, may not be retained.
 - Mid-level accuracy/speed recognition Enable this setting for a balance between speedy processing and accurate results.
 - Most accurate recognition Enable this setting to optimize the recognition process for accuracy.
- Specify maximum size of the images allowed Set a width and height limit (in pixels) for incoming images. All incoming images that exceed those specified values will not be processed. The default value is 8400 x 8400 pixels.
- Timeout Specify the time in seconds you want to elapse before the OCR recognition process times out.

Output Tab

You can also specify settings for the output of the OCR process. Note that the Output tab appears only for nodes that convert documents to another format. In addition, if you access this window from the Advanced OCR node and have specified Original Document + Metadata as the Output option, this tab does not appear.

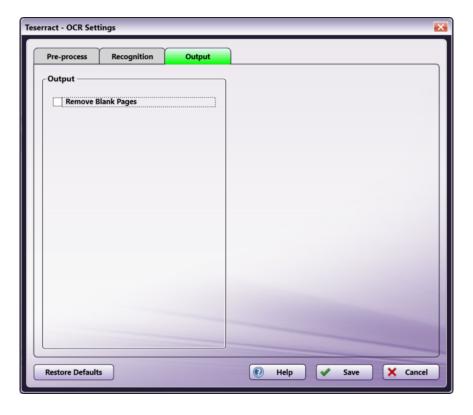
Note: The set of options available on this tab is determined by the **OCR engine**, based on the functional capabilities of the engine. If an option does not appear in the tab, it is not supported by the OCR engine. The illustrations below show the options available for the OmniPage and Tesseract OCR engines. All options are described in the section below the illustrations.

OmniPage Options



Tesseract Options

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Output

- · Output formatting level
 - **Automatic** When this setting is enabled, the OCR engine will automatically decide which output format to use based on the layout either specified or detected.
 - Plain Text When this setting is enabled, the OCR process will output plain, left-aligned text in a single column.
 - Formatted Text When this setting is enabled, the OCR process will output text with font and paragraph styling, along with graphics and tables

Note: When saving as an Excel file, each detected table or spreadsheet in a document will be saved in a separate worksheet.

- True Page When this setting is enabled, the original layout of the pages, including columns, will be retained on output, using text, picture and table boxes and frames.
- **Flowing Page** When this setting is enabled, the original layout of the pages, including columns, will be retained on output using, wherever possible, columns and indent settings (instead of text boxes or frames). Text flows from one column to the other.
- **Spreadsheet** When this setting is enabled, the results are output in tabular form, suitable for use in spreadsheet applications. Each page is placed in a separate worksheet.
- Retain filled form data When this setting is enabled, filled form data will be retained during the conversion process. This box is unchecked by
 default.
- Retain text and background color When this setting is enabled, colored text and backgrounds will be detected and available for output. Disable this setting if you want color pictures in the document but not colored text/backgrounds. This box is checked by default.
- Retain inverted text When this setting is enabled, inverted text (white or pale letters on a black/dark background) is maintained on output. Disable this setting to transform inverted text to normal text. This option is unavailable if the Optimize the OCR process for Fast recognition option is set.
- Remove Blank Pages When this setting is enabled, blank pages will not be included in the output file. This box is unchecked by default.
 - · Content Sensitivity Specify the threshold for sensitivity to marks and blemishes on blank pages.
 - Clean Move the slider towards Clean (100) to increase the sensitivity threshold.
 - Noisy Move the slider towards Noisy (0) to decrease the sensitivity threshold.

Output Formats/Types Supported by Dispatcher Phoenix

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Output Format/Type	Plain text	Formatted text	Spread Sheet	True Page	Flowing Page
eBook	YES	YES	NO	NO	NO
Microsoft Excel	YES	YES	YES	NO	NO
Microsoft PowerPoint / Microsoft Publisher	YES	YES	NO	NO	NO
Microsoft Word	YES	YES	NO	YES	YES
PDF	NO	NO	NO	YES	NO
PDF - Edited	YES	YES	NO	YES	NO
PDF with image on text or image substitutes	NO	NO	NO	YES	NO
RTF Word 2000	YES	YES	NO	YES	YES
WordPad	YES	YES	NO	NO	NO
WordPerfect 9, 10	YES	YES	NO	YES	YES
XML Paper Specification (XPS)	NO	NO	NO	YES	NO

Note: The default option for all output formats is "Automatic".

Fonts and Characters

Unrecognized character substitution - By default, unrecognizable characters found by the OCR engine will be represented in the output by a red tilde character (~). For example, if the OCR process could not recognize 'j' in 'reject,' the output would be: re~ect. You can specify your own character to use in this field.

Barcode Engines

Barcode recognition is driven by a barcode engine. Dispatcher Phoenix currently supports the following barcode engines:

- OmniPage
- ZXing

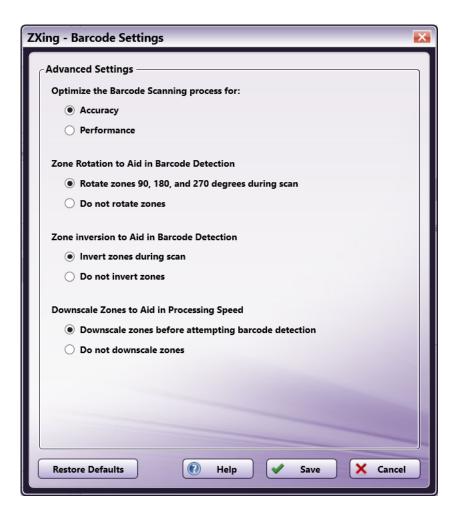
ZXing Nodes

The following nodes support the ZXing barcode engine:

- 2D Barcode Processing The 2D Barcode Processing node is included in the Dispatcher Phoenix base license with support for the ZXing engine. Support for the OmniPage can be purchased separately. Note that Advanced Settings for the ZXing engine are detailed below.
- Barcode Processing The Barcode Processing node is included in the Dispatcher Phoenix base license with support for the ZXing engine. Support for the OmniPage can be purchased separately. Note that Advanced Settings for the ZXing engine are detailed below.

Advanced Settings for ZXing

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Advanced options for the ZXing Barcode Engine include the following:

- Optimize the Barcode Scanning process for: This setting controls how the engine scans for barcodes.
 - Accuracy Enable this setting to optimize the recognition process for accuracy.
 - **Performance** Enable this setting to optimize the recognition process for speed. Although this setting potentially produces less accurate results, it can be useful when you know that your incoming documents are of good quality and can yield acceptable, accurate results.
- Zone Rotation to Aid in Barcode Detection Before scanning for barcodes, the application tries to detect and correctly orient zones for barcode detection. If you already know the exact misalignment of incoming files and want to speed up processing time by avoiding this auto-detection process, you can choose specific options here.
 - Rotate zones 90, 180, and 270 degrees during scan When this setting is enabled, the orientation of a zone is detected and
 improperly oriented zone images are automatically rotated (by 90, 180, or 270 degrees) before OCR takes place. This enabled option is the
 default value for rotation and mirroring.
 - **Do not rotate zones** When this setting is enabled, zones are not rotated.
- Zone inversion to Aid in Barcode Detection Before scanning for barcodes, barcode zones that are detected with white text against a dark background can be *temporarily* inverted during the preparation process to increase the accuracy of the OCR results.
 - Invert zones during scan When this setting is enabled, the need for color inversion is detected and inversion is performed on the zone during pre-processing. This enabled option is the default value.
 - **Do not invert zones** When this setting is enabled, zones are not inverted before the OCR process begins. Note that the accuracy of the OCR results may be affected with this option enabled.
- Downscale Zones to Aid in Processing Speed This setting controls how the engine scans for barcodes on large files.
 - **Downscale zones before attempting barcode detection** When this setting is enabled, the engine will attempt to *temporarily* downsize the zone to detect barcodes. This can lead to performance improvements.
 - **Do not downscale zones** When this setting is enabled, zones are not downscaled before scanning.

aiDocuDroid

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Important! As of the 9.7 release on October 3, 2024, aiDocuDroid is no longer available in Dispatcher Phoenix. As of this date, no new installations, upgraded installations, or transferred installations will include any aiDocuDroid capabilities. Workflows containing aiDocuDroid will need to be reconfigured to use the Tesseract or OmniPage OCR engines.

aiDocuDroid is a form automation and digitalization software for PDF and scanned form digital images featuring Al-based ICR/OCR, image processing and document layout analysis technology. aiDocuDroid works for a variety of form structures with contents filled in either printed or handwritten text in the same workflow. The following sections describe the usage of aiDocuDroid in Advanced OCR Node and Forms Processing Node.

Advanced OCR Node

Use the aiDocuDroid to refine optical character recognition (OCR) and intelligent character recognition (ICR) results and extract metadata through the use of zones. Through zones, you can define how you want the **aiDocuDroid engine** to recognize text on the page. For example, to capture invoice numbers from incoming documents, you can create a zone in the area of the document where invoice numbers appear. In addition, zones can extract metadata automatically and associate the metadata with the original document.

aiDocuDroid for Advanced OCR Node works with the following file types:

- TIFF
- JPG
- PNG
- BMP
- PDF

Forms Processing Node

Use aiDocuDroid for optical character recognition (OCR) and intelligent character recognition (ICR) results in order to conduct advanced searches for unique identifiers in imaged documents via text searches. You can extract and/or process (redact, highlight, or strikeout) information based on rules you define - without knowing the exact content of the information or even its exact position on the page.

aiDocuDroid for Forms Processing Node works with the following file types:

- TIFF
- IPG
- PDF

Notes:

- The document's images should be captured by scanner, not a camera.
- The recommended minimum DPI for scanned documents is 150 dpi and more.
- The documents should be printed with font size greater than 10pt and lower than 18pt.
- · Information on the form that needs to be extracted should not be damaged by noise and other artifacts.
- CPU version is workable but it is very slow. GPU is recommended for better performance. NVIDIA Geforce GTX 1650 (4GB, 10.2 CUDA support) or a more powerful, faster GPU card is recommended.
- aiDocuDroid engines are workable in 64-bit operating systems only, not supported in 32-bit operating systems.

AlDocuDroid Engines

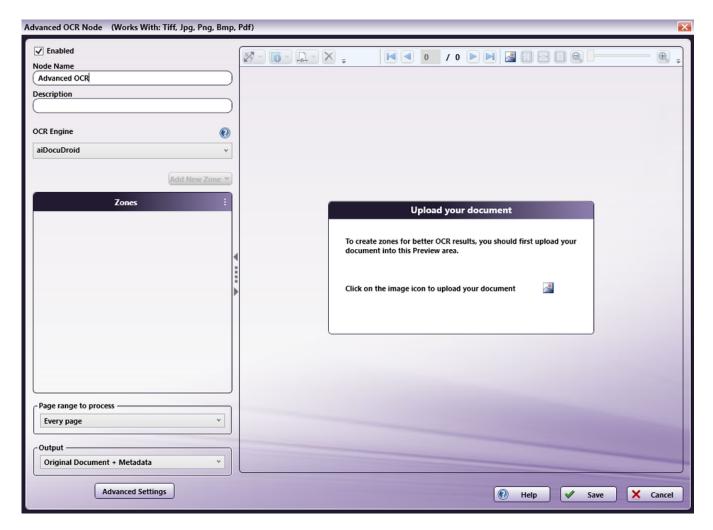
aiDocuDroid supports the following OCR/ICR engines in Advanced OCR and Forms Processing Nodes.

- aiDocuDroid (OCR)
- aiDocuDroid Handwritten (ICR)

Properties Window - Advanced OCR Node

To configure the aiDocuDroid in Advanced OCR Node, drag-drop the node on to the Workflow Builder's work area and double-click on it. The Advanced OCR Node properties window appears, as in the following illustration:

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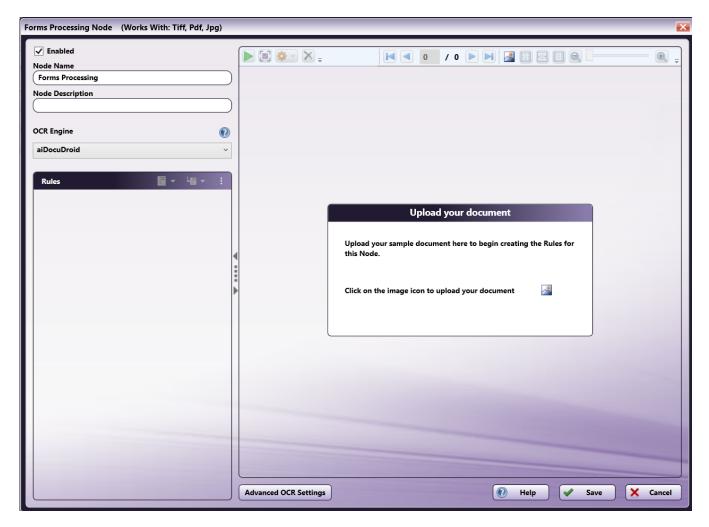
The above illustration shows the default configuration for the Properties window. You can change the OCR Engine between aiDocuDroid and aiDocuDroid Handwritten from the drop-down, as in the following illustration:



Properties Window - Forms Processing Node

To configure the aiDocuDroid in Forms Processing Node, drag-drop the node on to the Workflow Builder's work area and double-click on it. The Forms Processing Node properties window appears, as in the following illustration:

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The above illustration shows the default configuration for the Properties window. You can change the OCR Engine between aiDocuDroid and aiDocuDroid Handwritten from the drop-down, as in the following illustration:



Note: A sample image should be uploaded to the Forms Processing Node prior to executing the workflow. If a sample document is not associated with the node, then it is likely that rules created for the form will not trigger, despite the correct text being present.

General Settings - Advanced OCR Node

Defining Type/Content for Zones

You can choose settings for each zone to match the specific format of your zone content. With the zone selected on the Preview area, click on the icon on the toolbar to display the Zone Type drop-down palette. Next, choose a type for the zone. As of now, the aiDocuDroid engines support only Text Zone type.

Choosing an Output Format

Use the Output field to specify the format of the output file. This area appears at the left of the page, below the Zone List.

At the Output field, if you click on the drop-down, a list of output options appears. The **aiDocuDroid engines** can affect the list of options available in this field. If an option does not appear at the Output field, it is not supported by the engine. See the table below.

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Note: All processed output files include only the content captured in the user-defined zones, with the following exceptions. These output formats include the original file along with the content captured in the zones:

· Original Document + Metadata

Output Option	aiDocuDroid	aiDocuDroid Handwritten
Original Document + Metadata - Outputs the original file along with metadata extracted from defined zones. This is the default setting and is necessary to use metadata in other nodes within the workflow, such as Metadata to File and Metadata Route, for further processing.	Υ	Υ
Text - Outputs the document to plain text (*.TXT) that can be read by most text editors and word processors.	Υ	Υ
Comma Separated Text - Outputs the document into a tabled text file that can be read by Excel (*.CSV).	Υ	Υ
Formatted Text - Outputs the document to a *.TXT file, trying to retain the layout of the page by inserting extra spaces.	Υ	Υ
Text with line breaks - Outputs the document to text with a line break after each line.	Υ	Υ
Unicode Text - Outputs the document to plain text, using two-byte Unicode characters.	Υ	Υ
Unicode Comma Separated Text - Outputs the document into a tabled text file using two-byte Unicode characters. The output file can be read by Excel.	Υ	Υ
Unicode Formatted Text - Outputs the document to formatted text, using two-byte Unicode characters.	Υ	Υ
Unicode Text with line breaks - Outputs the document to text with a line break after each line and uses two-byte Unicode characters.	Υ	Υ
XML - Outputs the document to an XML file format.	Υ	Υ
PDF Searchable - PDF output converter that retains the original image in the foreground with the recognized text hidden in the background (in the correct position). PDF Searchable output files have a maximum of 8191 pages.	Υ	Υ

Creating Zones

The aiDocuDroid engines support manual zone creation only, automatic zone creation is not supported.

Notes:

• Test zone feature is also not supported by aiDocuDroid engines. The automatic zone creation icon (OCR) & Test Zone(s) icon (



🗇 from preview toolbar and **Test this zone** & **Test selected zones** options from Zone List will not be visible/enabled for the

aiDocuDroid engines.

• Created zones are intelligently adjusted for input document images of various sizes to ensure target text can be extracted.

General Settings - Forms Processing Node

The general settings when using aiDocuDroid with Forms Processing Node are mostly the same as with other OCR engines. The details can be found in Forms Processing Node

aiDocuDroid additionally offers the capability to process checkboxes. This results in some menus differing somewhat in their appearance and functions. These differences will be described below.

Forms Processing Checkbox Recognition

The aiDocuDroid engines support detection of various types of checkboxes in forms, along with recognition of whether the checkboxes are marked in input documents.

Checkboxes consist of elements of the form which can be indicated as true or false based on a simple marking in the image. Two general types of checkboxes are supported: standard and non-standard.

Standard Checkboxes

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Standard checkboxes consist of small squares or rectangles, typically adjacent to a text label:

Example of Square Checkboxes:

Reason for Referral: Non-participating Priority Health Provider Elective Procedure	☐ Outpatien
Example of Rectangular Chec	kboxes:
Marital Status: Single Married	

Non-Standard Checkboxes

Non-standard checkboxes encompass a number of styles, including circles, underlines, and brackets, again typically adjacent to a label. This also includes checkboxes in which the label itself is intended to be circled or otherwise marked:

Example of Circular Checkboxes:

0	Initial	Pres	ent	ation

Chief ComplaintSignificant Findings

Example of Underline Checkboxes:

Patient's	Sex:	M	F	

Examples of Bracket Checkboxes:

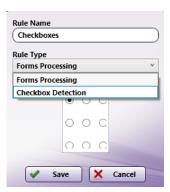
[1Continuing Care
() Payment of Claim

Example of Labels as Checkboxes:

WHO SENT YO	OU TO US OR FROM WH	AT SOURCE DID YOU	U GET OUR NAME?	(circle you choice
Physician	Family / Friend	Referral Service	Yellow Pages	Other

Auto detection of Checkbox Rules

Since forms can consist of a large number of checkboxes, an autodetection mechanism is in place to facilitate creation of checkbox rules. An additional option is available in the **Add New Rule** dialog, under **Rule Type**:

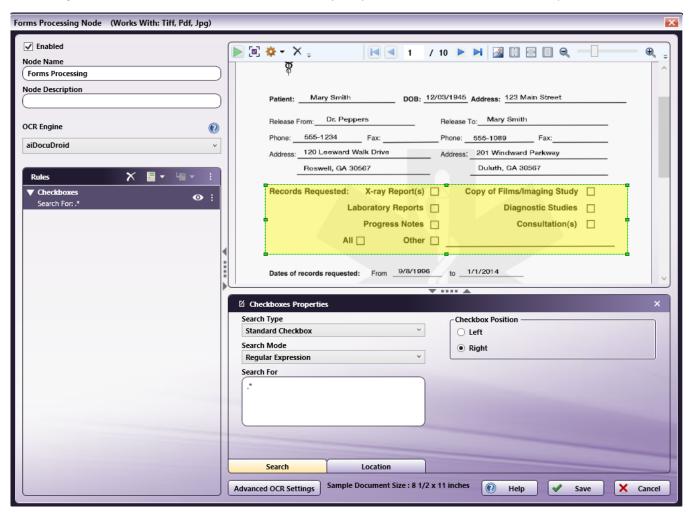


• Forms Processing: Use this option for creating a typical text-search rule, or to manually create a checkbox rule (described below.)

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• Checkbox Detection: Use this option to create a Region of Interest (ROI) for automatic checkbox rule creation.

After creating the Checkbox Detection rule, the dimensions can be adjusted just like other rules. There are a few extra options which can be set.

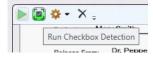


To configure the checkboxes which will be detected, the following settings can be configured:

- Search Type: There are two additional options, to detect either Standard or Non-Standard checkboxes. In this case, standard checkboxes will be detected.
- Search Mode and Search For: These options work exactly like they do in normal text-search Rules. They are used to limit the checkboxes that are detected. Only those checkboxes with labels that match the search settings will be created as rules. In the case of Normal search mode, multiple checkbox labels can be listed, one per line; any checkbox with a label in this list will be returned as a rule.
- Checkbox Position: This option is used to control how the checkbox itself is positioned relative to its associated label. Left indicates that the checkbox precedes the label; Right indicates that it comes after the label.

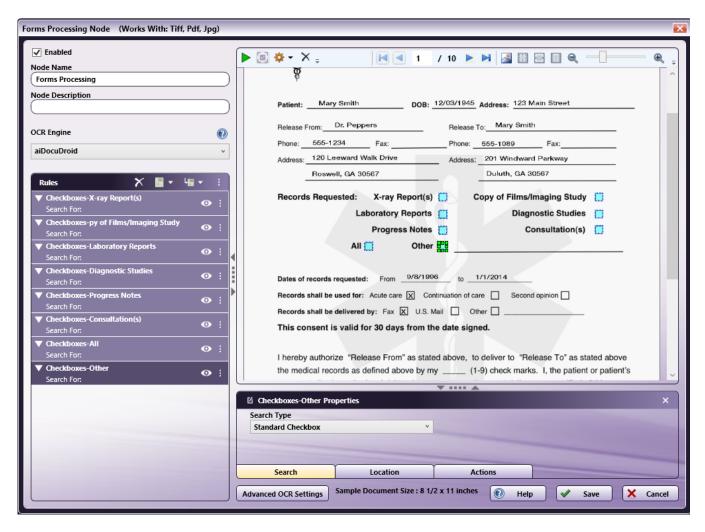
Automatic checkbox detection should be done with a blank template-one that is not already marked. Detection of checkboxes which already have markings is likely to fail. In such cases, checkboxes can be manually created for any that are not detected automatically.

Checkbox Detection rules can only be created as base rules, and cannot be created as sub rules. Multiple Checkbox Detection rules can be created. Once all desired rules are created, detection can be initiated by clicking the Run Checkbox Detection button:



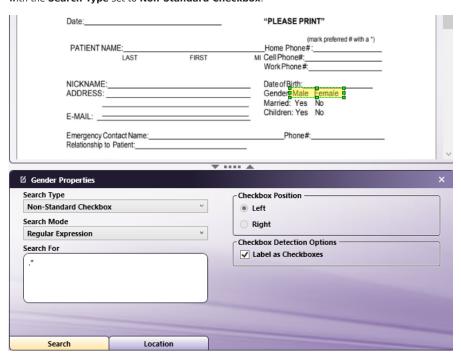
Upon completion of checkbox detection, the Checkbox Detection rule(s) will each be replaced by one or more checkmark rules.

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The names of the auto-generated rules will consist of the original **Checkbox Detection** rule name prepended to the label text detected for the checkbox.

Automatic detection of non-standard checkboxes is similar. A **Checkbox Detection** rule can be created which contains all desired checkboxes, but with the **Search Type** set to **Non-Standard Checkbox**:



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When detecting non-standard checkboxes, one additional option is available along with the **Checkbox Position**. If **Label as Checkboxes** is checked, then the text itself is treated as a checkbox. This is for the case in which labels are intended to be circled or underlined in order to indicate that an option is checked. When this option is selected, the **Checkbox Position** has no effect and is grayed out.

Autodetection results for non-standard checkboxes otherwise behave the same as for standard checkboxes.

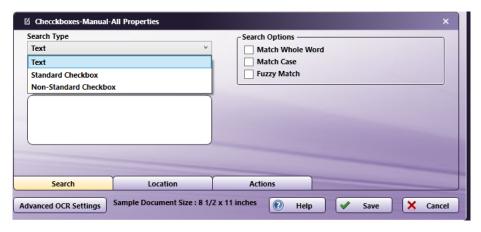
Manual Creation of Checkbox Rules

In some cases, it may be necessary to create checkbox rules without autodetection. This is mostly the case when unique characteristics of the form prevent proper autodetection of one or more checkboxes. Additionally, as noted above, **Checkbox Detection** rules cannot be created as sub rules. If checkmark recognition is desired to be done as a sub rule, it is necessary to create the rule manually.

Creating a checkbox rule is nearly identical to the creation of a normal text-search rule. When initially creating the rule, the **Rule Type** should be set to **Forms Processing**:



The Search Type for a manually-created checkbox rule must be set accordingly, to either Standard Checkbox or Non-Standard Checkbox.



When creating the rule boundaries, the dimensions should match up closely to the dimensions of the checkbox itself in order to facilitate checkmark recognition:



Metadata

When checkbox rules are automatically detected, the Metadata tab under **Actions** will also be automatically populated. The Metadata key will match the automatically generated rule name:

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When checkbox rules are manually created, the Metadata configuration is not automatically created. It is necessary to enter the desired **Metadata Key** manually:



Note that the Remove Duplicates option is only available if the manually created rule is a sub rule.

When processing a form with checkbox rules, if a checkmark is detected the Metadata value will be set to 1. Otherwise it is set to 0.

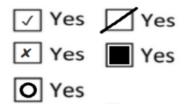
Recognition

When the workflow is executed, the checkbox rules will be processed according to the input file to determine if the checkbox is marked. Checkmark recognition can be sensitive to the mark type used. In general, a clear marking that does not overlap other page content will give the best results for recognition.

Checkmark detection is most effective when the workflow is configured with a blank template-one that has not been marked. If a marked template is used, then checkmark detection on the input file will be less accurate.

Supported Checkmarks

Some examples of supported checkmarks are:

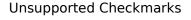


When the label itself is a checkbox, recognition is best when the label is circled completely:

WHO SENT YOU TO US OR FROM WHAT SOURCE DID YOU GET OUR NAME? (circle you choice)

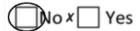
Physician Family / Friend Referral Service Yellow Pages Other

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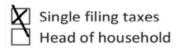




In this case, the checkbox is marked outside of the region specified for the rule:



In this case, although the top checkbox will likely be shown as marked as intended, the bottom checkbox will probably also show as marked which is likely unintended:



In this example, the marking is so minimal that it is unlikely to be indicated as marked:



Advanced Settings - Advanced OCR Node and Forms Processing Node

The aiDocuDroid engines use the advanced settings to adjust the accuracy of the OCR/ICR results as well as the performance time of the OCR/ICR process. The Advanced OCR and Forms Processing Nodes contains the Advanced Settings button, which accesses the OCR/ICR Settings window.

When you access the Advanced Settings window, the set of options that are available is determined by the aiDocuDroid engine, based on the functional capabilities of the engine.

The Advanced Settings window contains the following tabs, each with a set of related settings. You can specify settings for:

- Pre-process
- Recognition

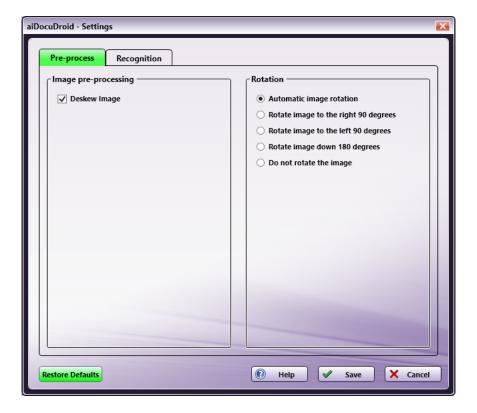
Note: aiDocuDroid engines do not support Output format settings for output document creation.

Pre-process Tab

Use this tab to set parameters specifying how to prepare and pre-process images before OCR/ICR analysis and recognition begins. The illustrations below show the options available for the **aiDocuDroid engines**. All options are described in the section below the illustrations.

aiDocuDroid Options

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aiDocuDroid Handwritten Options

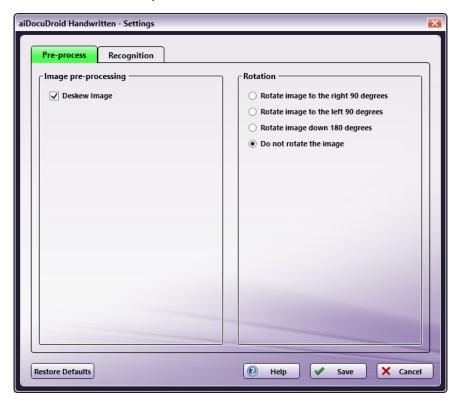


Image Pre-processing

Pre-processing procedures can be applied to images to enhance their quality before OCR/ICR recognition is performed. Enabling or disabling these options may improve the quality of your output and/or the performance time of the OCR/ICR process.

• **Deskew Image** - When this setting is enabled, images that have been scanned in crookedly are automatically straightened during the preparation process. The default value is enabled.

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Note: Turning off the **Deskew Image** pre-processing option may cause the OCR/ICR process to fail. If you turn off the option, you may need to add the Deskew node to the workflow so that the document can be properly processed.

Rotation

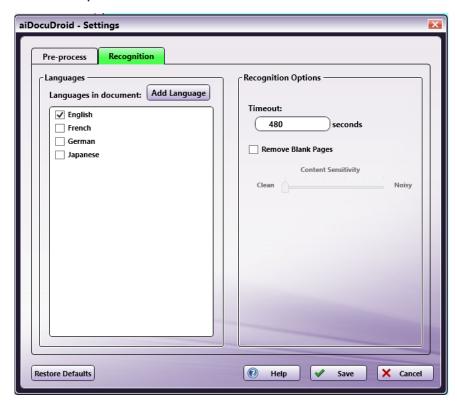
Before performing OCR/ICR, the application tries to detect and correct incorrectly oriented pages. If you already know the exact misalignment of incoming files and want to speed up processing time by avoiding this auto-detection process, you can choose specific options here.

- Automatic image rotation This option is available only for the aiDocuDroid engine. When this setting is enabled, the orientation of incoming images is detected and improperly oriented page images are automatically rotated (by 90, 180, or 270 degrees) before OCR takes place. This enabled option is the default value for rotation and mirroring.
- Rotate image to the right 90 degrees When this setting is enabled, improperly oriented page images are rotated by 90 degrees, clockwise.
- Rotate image to the left 90 degrees When this setting is enabled, improperly oriented page images are rotated by 90 degrees, counterclockwise.
- Rotate image down 180 degrees When this setting is enabled, improperly oriented page images are turned upside down.
- Do not rotate the image When this setting is enabled, the image is not rotated.

Recognition Tab

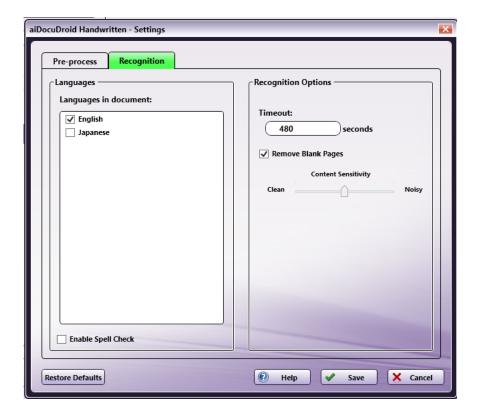
To improve OCR/ICR accuracy and processing time, you can specify specific settings to assist in the recognition process.

aiDocuDroid Options



aiDocuDroid Handwritten Options

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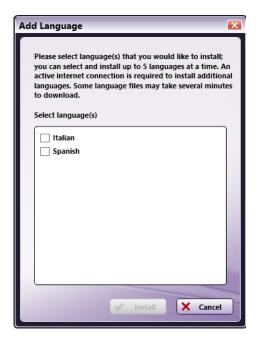
Languages

- Languages in document This window displays all languages currently supported by aiDocuDroid engines. Check the box next to the languages you want to include in the OCR/ICR recognition process. You must select at least one language. aiDocuDroid engines currently support English, French, German, Japanese, Italian, and Spanish languages for OCR; only English and Japanese are supported for handwritten recognition. English and Japanese can be selected together, but French, German, Italian, or Spanish cannot be selected in combination with another language. The default language is English.
- Enable Spell Check This option is available only for the aiDocuDroid Handwritten OCR English engine. To enable spell checking during OCR recognition, check this box.

Unlike suggestion-based spell checkers, the aiDocuDroid spell checker automatically corrects misspelled words (recognition errors) from recognition engine output in an unsupervised way. The aiDocuDroid spell checker is a deep learning model trained with over several million examples of possible misspelled words and corrected spelling pairs.

• Add Language - This button will cause a new window to be displayed, from which additional supported languages can be installed. Any available, but uninstalled, languages will be listed in this window. Upon installation, they will be available in the Languages in document window:

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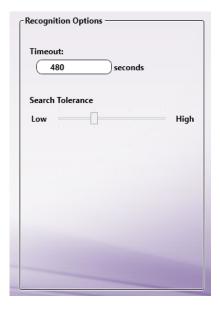
Recognition Options

- **Timeout** Specify the time in seconds you want to elapse before the OCR/ICR recognition process times out. The default timeout period is 480 seconds.
- Remove Blank Pages Specify whether blank pages in the input image should be detected and excluded from the output file. This will affect only those output types which are paginated, such as PDF Searchable.

When selected, the Content Sensitivity slider can be used to control how much extraneous content can be present on the page and still be considered "blank." Setting the slider to the "Clean" side will result in fewer pages being considered blank, while setting it to the "Noisy" side will allow for greater degrees of marking on the page while still being considered blank.

Additional Option for Forms Processing

When accessing this menu from a Forms Processing Node, a different option will be available in place of Remove Blank Pages.



• Search Tolerance - Allows for setting how strict matching is when "Fuzzy Search" is selected. By setting a higher tolerance, search results can be matched even when OCR results have errors. Setting this to a low tolerance can prevent false matches due to similar words. In particular, when searching for small words (fewer than four or five characters,) fuzzy search can indicate a high number of false results, so setting the tolerance low or disabling fuzzy search altogether may be optimal.

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Recognition of handwritten text can be particularly error prone. Therefore, it is strongly suggested to use fuzzy search for handwritten text, and to consider using a higher tolerance.

PDF Processing

PDF Data Extraction



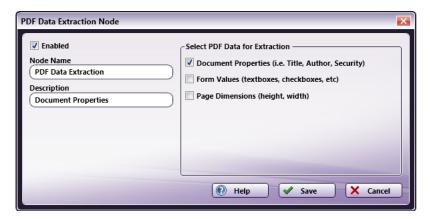
The PDF Data Extraction process is an optional node that extracts metadata from incoming PDF files for future use by other nodes in the workflow (i.e., routing on specific Document Properties, etc.) or for import into other systems for search purposes. With this process, the user must specify what metadata to extract. Files that cannot be opened as PDFs will leave this node on an "Error" transition.

Important! Metadata extracted from the PDF Data Extraction node is case sensitive. When using the metadata in your workflow, make sure that you use the appropriate case.

Sample Use Case: When batch processing PDF forms, data from the fields in the forms needs to be extracted and inserted into a database. A workflow that collects files from an Input Folder, processes them through the PDF Data Extraction and ODBC Processing nodes, and distributes them to an Output Folder automates this process.

Note: This node does not support AES (Advanced Encryption Standard) PDFs.

To open the PDF Data Extraction window, add a process node for PDF Data Extraction and double-click on it.



- Check the **Enabled** box when there are multiple processes in a workflow. If unchecked, this process will be ignored. Documents will pass through as if the node was not present. Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the PDF Data Extraction node.
- In the **Description** field, enter a description for the PDF Data Extraction node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- The Select PDF Data for Extraction area allows you to choose what PDF metadata should be extracted from the incoming document.

Note: Only Document Properties and Page Dimensions metadata will be listed in the Metadata Browser window for use by other nodes in the workflow.

You can choose to extract:

- **Document Properties** Information about the PDF, including the author, creator, subject, title, keywords, version, pages, and security options (whether or not it is encrypted, editable, printable, and enabled for high resolution printing).
- Form Values The values of form fields, such as text boxes, check boxes, radio buttons, etc. Values for PDF buttons are not extracted since
 buttons only have actions and labels associated with them (rather than values). Note that form values can only be extracted from PDF forms
 that have been created electronically and shared electronically. This means that Form values cannot be extracted from paper forms that
 have been scanned from the MFP as a PDF file type. To extract values from PDF image files, you must use the Advanced OCR node.

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- Page Dimensions The height and width of the document.
- Select the **Save** button to keep your PDF Data Extraction definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Important! Metadata from the **PDF Data Extraction** node is not inherently saved. Users must add an additional node, such as the **Metadata to File** to a workflow in order to capture the data extracted.

Crop PDF Pages

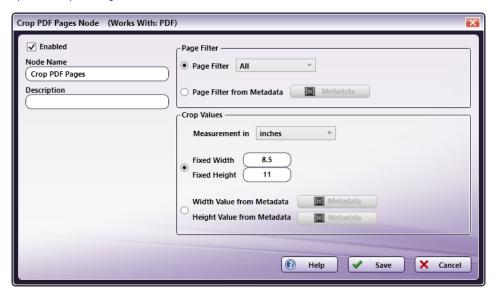


Note: This node works with PDF files (version 1.3 or later).

The **Crop PDF Pages Node** is a process node that can be used to crop PDF pages to a new size. Use the node to specify which pages are cropped as well as the crop size. Setting options also support setting some metadata values.

Using the Crop PDF Pages Node

Add the Crop PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Crop PDF Pages Node's window:



Specify the Crop PDF Pages properties in this window.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Crop PDF Pages Node.
- In the **Description** field, enter a description for the Crop PDF Pages Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

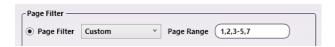
Page Filter

Use this panel to specify the pages to be cropped, based on ordinance, ranges, or per-document metadata properties.

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• Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

 Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more comma-separated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the **Select** button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]/,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

Crop Values

In this panel, the cropped page sizes may be entered using Fixed Values or by using metadata



- Measurement in: Use the drop-down to choose one of the three measurement units: PDF units, inches, or mm.
- Fixed Values: The target values for the new page size can be directly entered using the following input fields:
 - Fixed Width: Enter a crop Width to apply to a document's pages.
 - Fixed Height: Enter a crop Height to apply to a document's pages.

Note: The Crop PDF Pages Node can only be used to make the selected pages smaller. **Fixed Widths** or **Heights** larger than those of the input document are ignored.

Note: The Fixed Width and Height input fields only accept values above zero.

Note: The maximum accepted input for **the fixed height and width** is 199 inches, 5079 mm or 14399 pts. Larger values will generate an error message when the configuration values are saved.

- Values from Metadata: The Width and Height parameters may also be derived from page-level metadata. To support this option, there are two metadata buttons in the Crop Values panel:
 - Width Value from Metadata button: Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new Width value.
 - **Height Value from Metadata button:** Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new **Height** value.

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If incorrect metadata is selected or entered manually, the workflow will still run, but the pages will not be cropped. In such cases, a warning/error message is added to the Dispatcher Phoenix's error log.

Delete PDF Pages

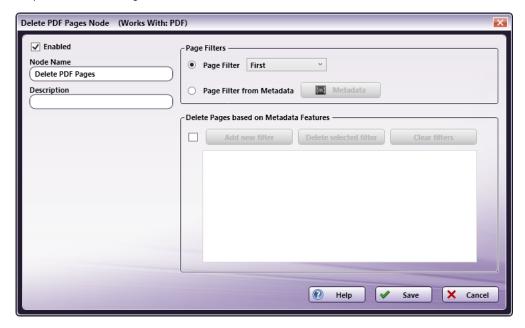


Note: This node works with PDF files (version 1.3 or later).

The **Delete PDF Pages Node** is a process node that can be used to delete specific pages from a PDF document. Use the node's setting window to specify either a fixed range of or specific pages that should be deleted.

Using the Delete PDF Pages Node

Add the Delete PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Delete PDF Pages Node's window:



- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Delete PDF Pages Node.
- In the **Description** field, enter a description for the Delete PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

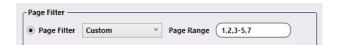
Page Filter

In this panel, specify the pages to be deleted, based on ordinance, ranges, or per-document metadata properties.



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Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and
Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

 Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

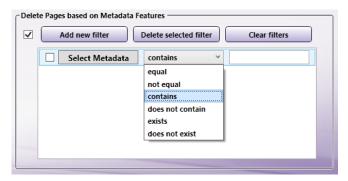
Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more commaseparated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]/,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

Delete PDF Pages based on Metadata Features

Use this panel to specify per-page metadata features of the pages to be deleted. Each document page matching these features is deleted.



- Checkbox: To use this page, select the checkbox.
- · Add new filter: Click this button to add a new per-page metadata filter. Edit this new filter by clicking on its fields.
 - Select Metadata: Click to open a Metadata browser window, in which either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.
 - Drop-down menu: Choose a value from the drop-down menu. Supported values are: Equal, Not Equal, Contains, Does Not Contain, Exists, or Does Not Exist.
 - Comparison value input field: All drop-down options, except for Exists and Does Not Exist require a value in this column.
- Delete selected filter: To remove a single per-page metadata filter, click on the filter's line the click the Delete Selected Filter button.
- Clear filters: Removes all per-page metadata filters.

Duplicate PDF Pages



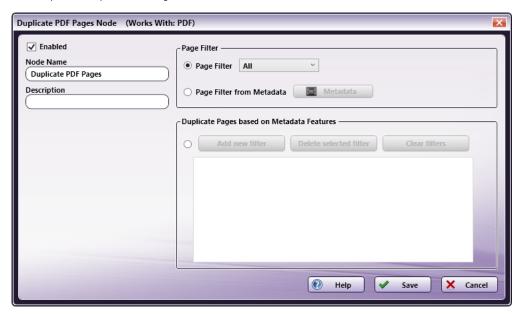
Note: This node works with PDF files (version 1.3 or later).

The **Duplicate PDF Pages Node** is a process node that can be used to duplicate pages in a PDF document. Use the node's setting window to specify either a fixed range of or specific pages that should be duplicated.

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Using the Duplicate PDF Pages Node

Add the Duplicate PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Duplicate PDF Pages Node's window:



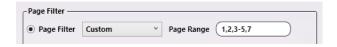
- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Delete PDF Pages Node.
- In the **Description** field, enter a description for the Delete PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Page Filter

In this panel, specify the pages to be duplicated, based on ordinance, ranges, or per-document metadata properties.



Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and
Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

• Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more comma-separated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

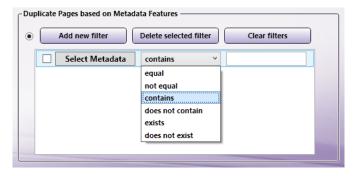
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• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]|,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

Duplicate PDF Pages based on Metadata Features

Use this panel to specify per-page metadata features of the pages to be deleted. Each document page matching these features is duplicated.



- Checkbox: To use this page, select the checkbox.
- · Add new filter: Click this button to add a new per-page metadata filter. Edit this new filter by clicking on its fields
 - Select Metadata: Click to open a Metadata browser window, in which either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.
 - Drop-down menu: Choose a value from the drop-down menu. Supported values are: Equal, Not Equal, Contains, Does Not Contain, Exists, or Does Not Exist.
 - Comparison value input field: All drop-down options, except for Exists and Does Not Exist require a value in this column.
- Delete selected filter: To remove a single per-page metadata filter, click on the filter's line the click the Delete Selected Filter button.
- Clear filters: Removes all per-page metadata filters.

Insert PDF Pages



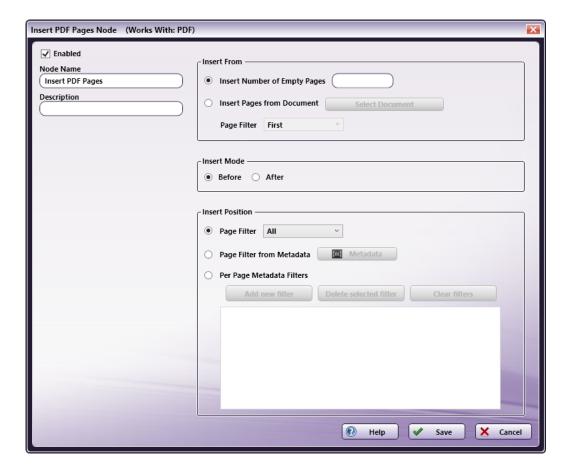
Note: This node works with PDF files (version 1.3 or later).

The **Insert PDF Pages Node** is a process node that can be used to insert blank pages or pages from another PDF file into a PDF document. Use the node's setting window to specify whether to insert the pages at fixed positions or insert them based on metadata values.

Using the Insert PDF Pages Node

Add the Insert PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Insert PDF Pages Node's window:

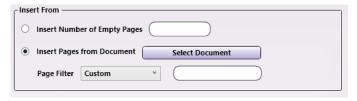
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- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Insert PDF Pages Node.
- In the **Description** field, enter a description for the Insert PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Insert From

In this panel, specify the pages to be inserted. One, multiple empty pages, or pages from another PDF document may be inserted using this node.



- Insert Empty Pages Number of Empty Pages: Enter the number of insertion pages to be added into the text field.
- Insert Pages from Document: Click the Select Document button to navigate to and then select the source document which contains the pages that are to be inserted. The Page Filter drop-down is then activated.
 - Page Filter: Select one of the Page Filter options from the drop-down. The options are: All, First, Last, Even, Odd, and Custom.

If **Custom** is selected, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 in-stead of 3,4,5 are accepted. A maximum of 100 characters may be entered in this field.

Insert Mode

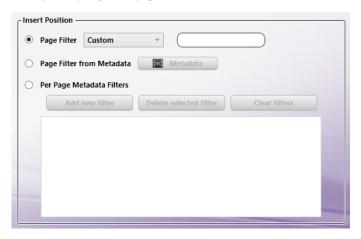
Click one of the radio buttons to determine whether the additional pages will be inserted before or after the existing pages.

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Insert Position

In this panel, specify where pages will be inserted.



• Page Filter: Choose one of the predefined page filters from the drop-down menu. The values are: All, First, Last, Even, Odd, and Custom.

If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

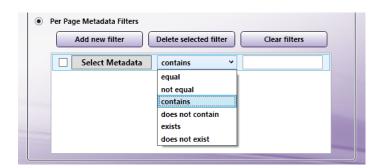
Note: The page number must not be greater than 2147483647.

 Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more commaseparated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]/,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.



- Checkbox: To use this page, select the checkbox.
- Add new filter: Click this button to add a new per-page metadata filter. Edit this new filter by clicking on its fields.
 - Select Metadata: Click to open a Metadata browser window, in which either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.
 - Comparator drop down menu: Choose a value from the drop-down menu. Supported values are: Equal, Not Equal, Contains, Does Not Contain, Exists, or Does Not Exist.
 - Comparison value input field: All drop-down options, except for Exists and Does Not Exist require a value in this column.

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- Delete selected filter: To remove a single per-page metadata filter, click on the filter's line the click the Delete Selected Filter button.
- Clear filters: Removes all per-page metadata filters.

Move PDF Pages

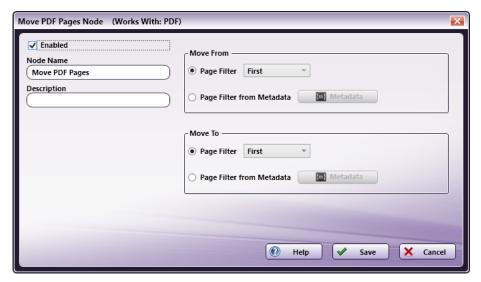


Note: This node works with PDF files (version 1.3 or later).

The **Move PDF Pages Node** is a process node that may be used to move pages within a PDF file. Use the node's setting window to specify which page to moves and as well as the new location of the pages in the document.

Using the Move PDF Pages Node

Add the Move PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Move PDF Pages Node's window:



- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Move PDF Pages Node.
- In the **Description** field, enter a description for the Move PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

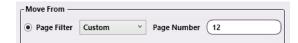
Move From

In this panel, the page movement specifics may be entered using Fixed Values or by using metadata.



• Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: First, Last, and Custom.

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If Custom is chosen, the Page Number input field appears. Only a single page number may be entered. Multiple pages or ranges of pages are not supported.

Note: The page number must not be greater than 2147483647.

Page Filter from Metadata: Use this option to select the page to move based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a Custom Page Number (see above).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.

All Metadata syntax specified in the Help topic Metadata Reference Information may be used.

Move To

In this panel, specify where the pages are moved based on ordinance or metadata properties.



• Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: First, Last, and Custom.

If Custom is chosen, the Page Number input field appears. Only a single page number may be entered. Multiple pages or ranges of pages are not supported.

Note: The page number must not be greater than 2147483647.

• Page Filter from Metadata: Use this option to select the page to move based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a Custom Page Number (see above).

Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the Select button to apply the metadata key.

All Metadata syntax specified in the Help topic Metadata Reference Information may be used.

Shift PDF Pages



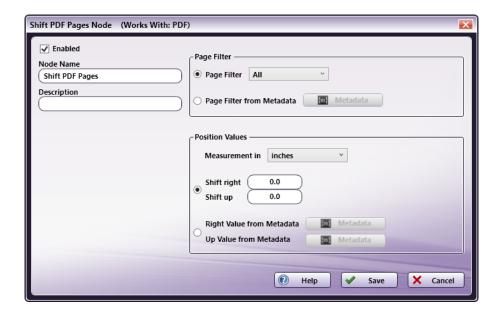
Note: This node works with PDF files (version 1.3 or later).

The Shift PDF Pages Node is a process node that can be used to shift the content of pages in a PDF document. Use the node's setting window to specify which pages are shifted and by how much they should be moved.

Using the Shift PDF Pages Node

Add the Shift PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Shift PDF Pages Node's window:

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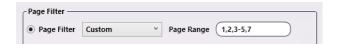
- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Shift PDF Pages Node.
- In the **Description** field, enter a description for the Shift PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Page Filter

In this panel, specify the pages to be shifted, based on ordinance, ranges or per-document metadata properties.



• Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

 Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more comma-separated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

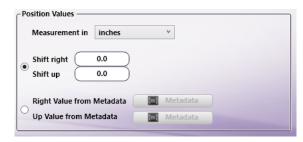
• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the **Select** button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]|,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

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Position Values

In this panel, the new page position may be entered using fixed values or by using metadata.



- Measurement in: Use the drop-down to choose one of the three measurement units: PDF units, inches, or mm.
- Fixed Values: The target values for the new position can be directly input into the following fields. The offset values may be positive or negative. There are no upper or lower limits.
 - Shift Right: Enter the number of measurement units the page contents are shifted right. To shift left, use negative numbers.
 - Shift Up: Enter the number of measurement units the page contents are shifted up. To shift down, use negative numbers.

Note: Shifting the page contents too far can lead to empty pages in the output document since the Shift PDF Pages Node does not alter the current Page Height or Page Width.

- Values from Metadata: The Shift Right and Shift Up parameters may also be derived from page-level metadata. To support this option, there are two metadata buttons in the Position Values panel:
 - **Right Value from Metadata button:** Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new **Right** value.
 - **Up Value from Metadata button:** Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new **Up** value.

If incorrect metadata is selected or entered manually, the workflow will still run, but the pages will not be shifted. In such cases, a warning/error message is added to the Dispatcher Phoenix's error log.

Resize PDF Pages



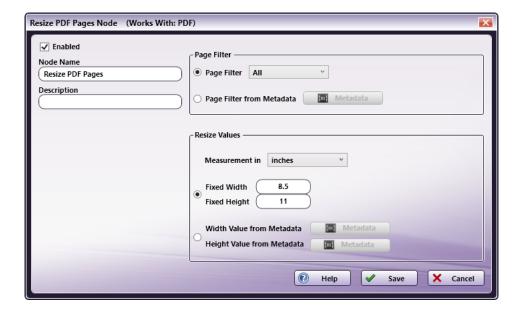
Note: This node works with PDF files (version 1.3 or later).

The **Resize PDF Pages Node** is a process node that can be used to change the size of PDF pages. Use the node's setting window to specify which pages to resize as well as the resize values.

Using the Resize PDF Pages Node

Add the Resize PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Resize PDF Pages Node's window:

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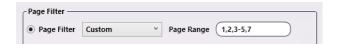
- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Resize PDF Pages Node.
- In the **Description** field, enter a description for the Resize PDF Pages Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Page Filter

In this panel, specify the pages to be resized, based on ordinance, ranges or per-document metadata properties.



• Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

 Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more comma-separated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the **Select** button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]|,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

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Resize Values

In this panel, the new page sizes may be entered using Fixed Values or by using metadata.



- Measurement in: Use the drop-down to choose one of the three measurement units: PDF units, inches, or mm.
- Fixed Values: The target values for the new page size can be directly entered using the following input fields:
 - Fixed Width: Enter a crop Width to apply to a document's pages.
 - Fixed Height: Enter a crop Height to apply to a document's pages.

Note: The Fixed Width and Height input fields only accept values above zero.

Note: The maximum accepted input for **the fixed height and width** is 199 inches, 5079 mm or 14399 pts. Larger values will generate an error message when the configuration values are saved.

- Values from Metadata: The Width and Height parameters may also be derived from page-level metadata. To support this option, there are two metadata buttons in the Resize Values panel:
 - Width Value from Metadata button: Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new Width value.
 - **Height Value from Metadata button:** Click on this button to open a Metadata browser window. Select either a metadata key by double-clicking on it, or type in a custom string. The metadata information is then used for the new **Height** value.

If incorrect metadata is selected or entered manually, the workflow will still run, but the pages will not be resized. In such cases, a warning/error message is added to the Dispatcher Phoenix's error log.

Rotate PDF Content



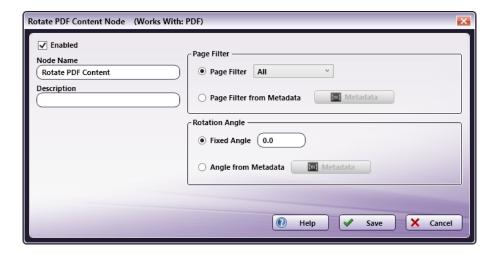
Note: This node works with PDF files (version 1.3 or later).

The **Rotate PDF Pages Node** is a process node that can be used to rotate the content of pages in a PDF document. Use the node's setting window to specify which pages are rotated and the rotation angle that should be applied.

Using the Rotate PDF Content Node

Add the Rotate PDF Pages Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Rotate PDF Pages Node's window:

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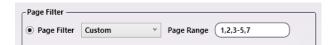
- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Shift PDF Pages Node.
- In the **Description** field, enter a description for the Shift PDF Pages. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select the **Save** button to apply the settings. Select the **Cancel** button to exit the window without saving any changes.
- Select the Help button to access online help.

Page Filter

In this panel, specify the pages to be rotated, based on ordinance, ranges, or per-document metadata properties.



 Page Filter: Choose one of the pre-defined page filters from the drop-down menu. The supported options are: All, First, Last, Odd, Even, and Custom.



If **Custom** is chosen, the **Page Range** input field appears. Use the field to enter a custom range of page numbers. Both comma-separated values and ranges (e.g., 3-5 instead of 3,4,5) are accepted. A maximum of 100 characters may be entered in the field.

Note: The page number must not be greater than 2147483647.

• Page Filter from Metadata: Use this option to select pages to process based on document-level metadata. Click on the Metadata Button (see below) to open the metadata browser.

Note: The result of the entered metadata expression must be a **Custom Page Filter** (see above), i.e. a string containing one or more comma-separated, single page numbers (e.g. 2) or page ranges (e.g. 3-5).

• Metadata Button: Click to open a Metadata browser window. Either a metadata key or a custom string value may be entered. To select a metadata key, double-click on it, and then click on the **Select** button to apply the metadata key.

All Metadata syntax specified in the Help topic **Metadata Reference Information** may be used. For example, if there are multiple document-level values containing page numbers for the metadata key {data:page}, use {data:page[]/,} as the page filter from metadata to concatenate them with commas in order to generate a valid page filter. For a single value, use {data:page[]}.

Rotation Angle

In this panel, the rotation angle may be entered using fixed values or by using metadata.

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• Fixed Angle: Enter the new rotation angle the node will apply to pages. Use positive values to rotate the page to the right, and negative values to rotate the page to the left.

Note: The Rotate PDF Content Node only rotates the page contents but does not change the page dimensions.

Note: The entered rotation angle is not limited to a specific range, but will always be taken as modulo 360.

Angle from Metadata: Click this button to open a metadata browser window. In it, select a metadata key by double-clicking on it, or type in a
custom string. The metadata information will then define the rotation angle of the pages (as described in the Fixed Angle section above). Only
page-level metadata may be used.

If incorrect metadata is selected or entered manually, the workflow will still run, but the pages will not be rotated. In such cases, a warning/error message is added to the Dispatcher Phoenix's error log.

Security

Copy Defender



Copy Defender helps prevent unauthorized copying of confidential and valuable documents. The Copy Defender process allows you to set up the following Copy Protection features:

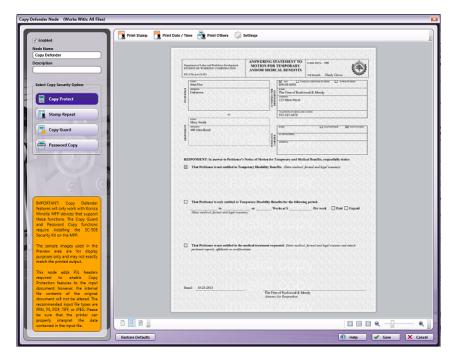
- **Copy Protect** Prints a copy security background pattern in the document. Text such as "Invalid Copy" or "Unauthorized" appears when the document is improperly copied. As an option, you can also add the date/time, distribution control number, serial number, and job number to the text, if needed. By printing text such as "Copy" or "Private" as a visible stamp, unauthorized copying is deterred.
- Stamp Repeat Adds stamps such as "Copy" and "Private" on the entire page.
- Copy Guard Embeds a copy restriction pattern on all printed sheets. If an attempt is made to copy a Copy Guard sheet on a device that supports this function, the copying process is canceled and the job is deleted.
- Password Copy Embeds a password on all printed sheets. If an attempt is made to copy a Password Copy sheet on a device that supports this
 function, the entry of a password is requested. Copying starts only if the correct password is entered.

Notes:

- This node works with all files.
- These features only work with Konica Minolta MFP devices that support Copy Protection.
- The sample images used in the Preview Area are for display purposes only and may not match the printed output exactly.
- Files processed by this node must be sent to Konica Minolta devices that support Copy Protection features via the Printer node. Make sure that the MFP has the PDF interpreter that supports the version of PDF that you are sending.
- You can print multiple stamps (e.g., preset stamp, registered stamp, date/time, job number, serial number) at a time; however, the number of stamps that can be printed may be limited depending on the type and angle of the selected stamps.
- The language of the stamps that are printed will depend on the language setting of the MFP.

To open the *Copy Defender Node* window, add a process node for *Copy Defender* and double-click on it. You will see a sample document displayed in the preview area with default Copy Defender settings applied to it, as in the following illustration:

Konica Minolta 630 / 1597



To get started with this node, do the following:

- 1. Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- 2. In the Node Name field, enter a meaningful name for the Copy Defender node.
- 3. In the **Description** field, enter a description for the Copy Defender Node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. To use this node, you can do the following:
 - Add Copy Protect features to the document. Konica Minolta's Copy Protect feature adds text such as "Copy" and "Private" in a background
 pattern as concealed text. When a copy-protected document is copied, the concealed security watermark appears on the entire page,
 indicating that it is an unauthorized copy.
 - Add Stamp Repeat features to the document. Konica Minolta's Stamp Repeat feature adds stamps such as "Copy" and "Private on the entire page.
 - Add Copy Guard features to the document. Konica Minolta's Copy Guard function prints concealed security watermarks such as "Private" or
 a date in the background to prevent unauthorized copying; in addition, a copy restriction pattern is embedded on all printed sheets. If an
 attempt is made to copy a Copy Guard sheet on a device that supports this function, the copying process is canceled and the job is deleted.
 - Add Password Copy features to the document. Konica Minolta's Password Copy function prints concealed security watermarks such as
 "Private" or a date in the background to prevent unauthorized copying; in addition, a password is embedded on all printed sheets. If an
 attempt is made to copy a Password Copy sheet on a device that supports this function, the entry of a password is requested. Copying starts
 only if the correct password is entered.
 - Display different sample documents in the Preview area.
- 5. When you are done, select the **Save** button to save your changes and close the node.

Specifying Copy Protect Settings

To specify Copy Protect settings, do the following:

- 1. Select Copy Protect from the Select Copy Security Option area on the left-hand side of the window.
- 2. To customize the default stamp that will reveal itself when the document is copied, select the **Print Stamp** button on the top menu bar; a drop-down palette will appear, allowing you to choose either preset stamps or custom stamps that have been defined on the MFP, as in the following illustration:

Konica Minolta 631 / 1597



Do the following:

- This feature is enabled by default. If you do not want any text printed on the document, uncheck the Enable this feature box.
- To choose a preset stamp, click on the Print Preset Stamp radio button; then choose one of the buttons listed: Invalid Copy, Copy, Invalid, Private, Unauthorized, Draft, Confidential, or Illegal Copy. The words that you selected will automatically appear on the sample document in the Preview Area.
- To choose a custom stamp that was defined on the MFP, click on the Print Registered Stamp radio button. The text registered on the MFP appears as "Machine Setting 1," "Machine Setting 2," etc. Choose one of the buttons listed. Although the sample document in the Preview Area will not display the correct stamp, the actual stamp corresponding to the Machine Setting that you selected will print on the document when the workflow runs.
- When done, click out of the drop-down palette or click on the **X** on the top right-hand side to close the palette.
- 3. To add a date/time stamp to the text that will reveal itself when the document is copied, select the **Print Date/Time** button on the top menu bar; a drop-down palette will appear, allowing you to choose and format the date/time for the document, as in the following illustration:

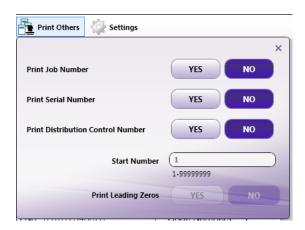


Do the following:

This feature is disabled by default. If you do want to add the date (optionally including the time as well) to the document, check the **Print Date** box. The Select Date Format buttons now become active. Choose a format for the date by selecting one of the buttons listed below. Note that the buttons reflect the current date.

Konica Minolta 632 / 1597

- After selecting a Date format, you can choose to add the Time as well. Check the **Print Time** box. The Select Time Format buttons now
 become active. Choose a format for the time by selecting one of the buttons listed. The settings that you choose will appear automatically
 on the sample document in the Preview Area.
- When done, click out of the drop-down palette or click on the X on the top right-hand side to close the palette.
- 4. To add the job number, serial number, and/or distribution control number to the document, select the **Print Others** button on the top menu bar; a drop-down palette will appear, as in the following illustration:



Do the following:

- To add the job number managed by the printer, select the Yes button next to Print Job Number.
- To add the serial number programmed on the printer, select the Yes button next to Print Serial Number.
- To add copy numbers when printing multiple sets of copies, select the Yes button next to Print Distribution Control Number. You can
 specify the starting number for this number in the Start Number field. You can also specify that zeros should be placed in front of the
 Distribution Control Number by selecting the Yes button next to Print Leading Zeros. The settings that you choose will appear
 automatically on the sample document in the Preview Area.
- When done, click out of the drop-down palette or click on the X on the top right-hand side to close the palette.
- 5. To modify settings for the stamps and background security pattern, select the **Settings** button on the top menu bar; a palette on the right-hand side of the window will appear, as in the following illustration:

Konica Minolta 633 / 1597



Note: Most of the changes that you make will be automatically applied to the sample document in the Preview Area.

Do the following:

- To modify the text size, select the Small, Standard, or Large button under Text Size.
- To modify the density of the background pattern, select the Light, Normal, or Dark button under Density.
- To select text and background colors, choose a color button (Black, Cyan, or Magenta) under Text / Background Color.
- To select whether the pattern is added to the background or foreground of the document, choose **Front** or **Back** under **Pattern Overwrite**. Note that these options will not be visible on the sample document in the Preview Area.
- To modify the angle of the text, choose the appropriate button (45 degrees, 0 degrees, -45 degrees) under Angle, as follows:



- To select the pattern to be applied when the document is improperly copied, choose a pattern button under **Background Patterns**.
- To specify the contrast of the background pattern, choose the following under **Pattern Style**:
 - Emboss Text Text pattern will appear embossed when the document is improperly copied.
 - Emboss Background Text pattern will appear as an outline when the document is improperly copied.
- To adjust the contrast between the background pattern and the text, choose a number button under **Pattern Contrast**.
- To close the palette, click on the ${\bf X}$ on the top right-hand side to close the palette.

Konica Minolta 634 / 1597

Specifying Stamp Repeat Settings

To specify Stamp Repeat settings, do the following:

- 1. Select Stamp Repeat from the Select Copy Security Option area on the left-hand side of the window.
- 2. Choose Print Stamp, Print Date/Time, Print Others, and Settings options from the top menu tool bar. Note that you will not be able to modify Background Patterns or Pattern Style/Contrast with this option.

Specifying Copy Guard Settings

To specify Copy Guard settings, do the following:

- 1. Select Copy Guard from the Select Copy Security Option area on the left-hand side of the window.
- 2. You can modify the following:
 - · Print Stamp
 - Print Date/Time
 - Print Others
 - Settings: Text size and color, Pattern contrast, background pattern

Specifying Password Copy Settings

To specify Password Copy settings, do the following:

1. Select **Password Copy** from the **Select Copy Security Option** area on the left-hand side of the window. New fields will appear, as in the following illustration:



- 2. Enter a 20 character password phrase that will be used to encrypt the user password in the Encryption Passphrase field.
- 3. Define the **same** encryption passphrase at the MFP by following these steps:
 - Press the **Menu** button on the MFP.
 - Tap on the **Utility** button.
 - Tap Administrator Settings. Enter the MFP's administrator password when prompted.
 - Tap Security Settings.
 - Tap Driver Password Encryption Setting.
 - Select User-Defined and then enter the same encryption passphrase in the Encryption passphrase field, as in the following illustration:

Konica Minolta 635 / 1597



- Tap on **OK** to set the encryption passphrase.
- 4. Enter a user password (up to 8 characters) that will be used to restrict copying in the **Password** field.
- 5. You can modify the following:
 - Print Stamp
 - Print Date/Time
 - Print Others
 - Settings: Text size and color, Pattern contrast, background pattern

Customize Preview Area

This node comes with two sample documents that are displayed in the Preview Area. The toolbar at the bottom of the window allows you to choose which sample document to preview. The blank page icon removes the sample document from Preview. The other two page icons are sample documents. See the following illustration:



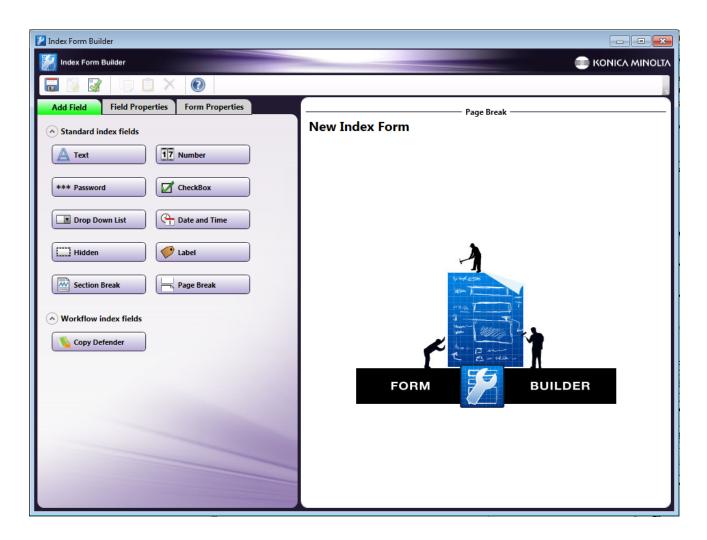
Using Copy Defender At The MFP

You can also modify Copy Defender settings at the MFP by first attaching a Copy Defender Index Form to the MFP Panel node in your workflow; then, at the MFP, you can access that workflow and specify new settings for the Copy Defender process.

Do the following:

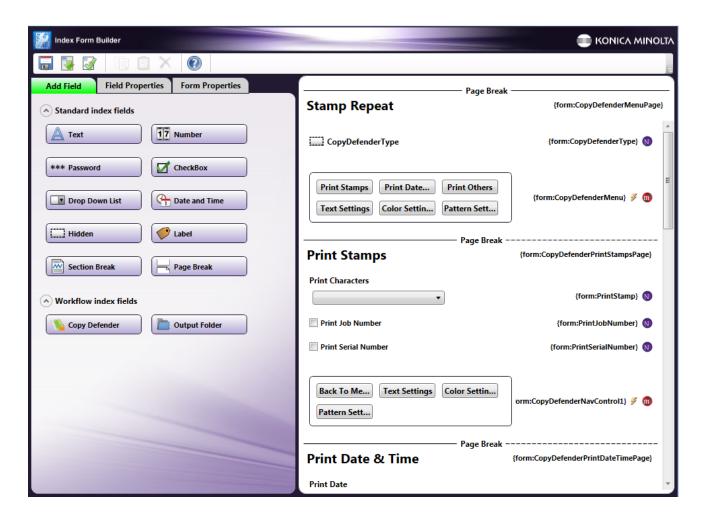
- 1. Set up a workflow with a MFP Panel node and Copy Defender node.
- 2. You can choose a Copy Security option by editing the Copy Defender node properties window.
- 3. Check the Attach Index Form box; then select the + icon (Add new index form).
- 4. When prompted, choose to Create New Blank Index Form.
- 5. You should see an **Copy Defender** button under the Workflow index fields area on the left-hand side of the Index Form Builder, as in the following illustration:

Konica Minolta 636 / 1597

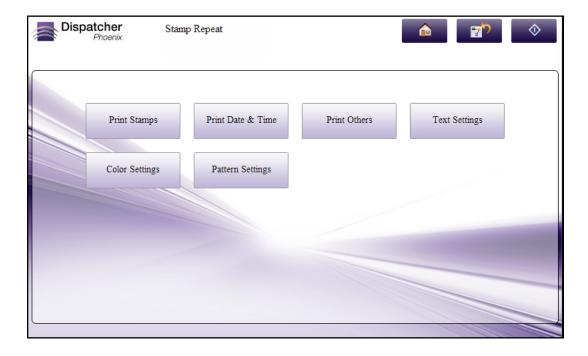


6. Drag-drop the **Copy Defender** button to the right-hand side of the Index Form Builder. The appropriate Index Form fields will automatically appear, depending on which Copy Security option was selected in the Copy Defender node. For example, in the following illustration, the Stamp Repeat option was selected in the Copy Defender node:

Konica Minolta 637 / 1597



7. At the MFP panel, run the Copy Defender workflow; then tap on the **Copy Defender** icon to customize Copy Defender settings. You should see the following screen:



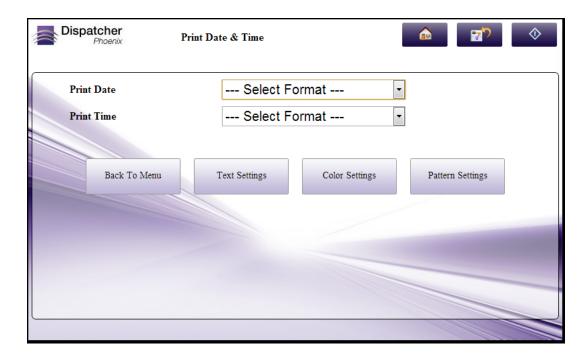
8. Here, you can do the following: $\frac{1}{2}$

Konica Minolta 638 / 1597

• Tap on **Print Stamps** to choose the text that you want added to the security pattern that is applied to the document, and whether or not to add the Job Number and Serial Number as well. See the following illustration:

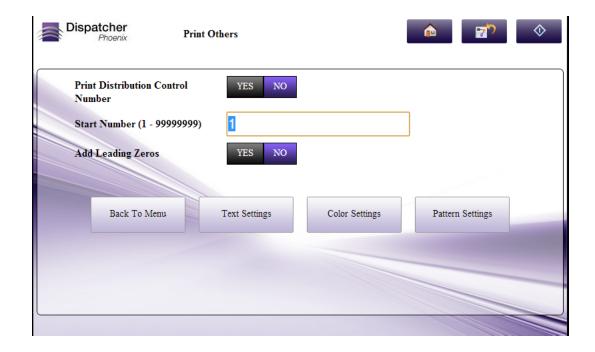


- When you are done, you can choose to return to the main menu screen or modify **Text Settings**, **Color Settings**, or **Pattern Settings** using the buttons at the bottom of the screen.
- Tap on **Print Date & Time** to add the Date (and Time, if necessary) to the security pattern that is applied to the document. See the following illustration:

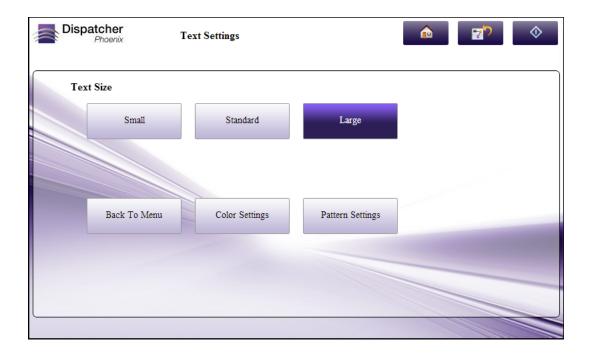


- When you are done, you can choose to return to the main menu screen or modify **Text Settings**, **Color Settings**, or **Pattern Settings** using the buttons at the bottom of the screen.
- Tap on **Print Others** to add the Distribution Control Number to the security pattern that is applied to the document. See the following illustration:

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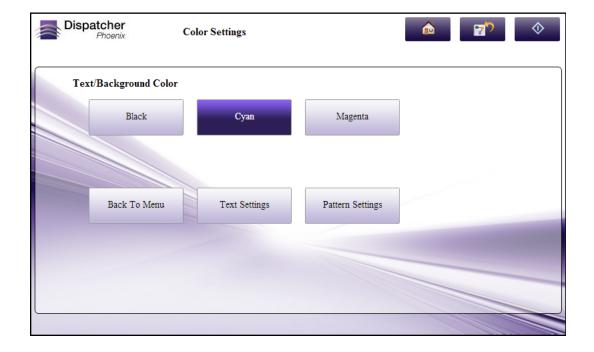


- When you are done, you can choose to return to the main menu screen or modify **Text Settings**, **Color Settings**, or **Pattern Settings** using the buttons at the bottom of the screen.
- Tap on **Text Settings** to format the size of the text. See the following illustration:

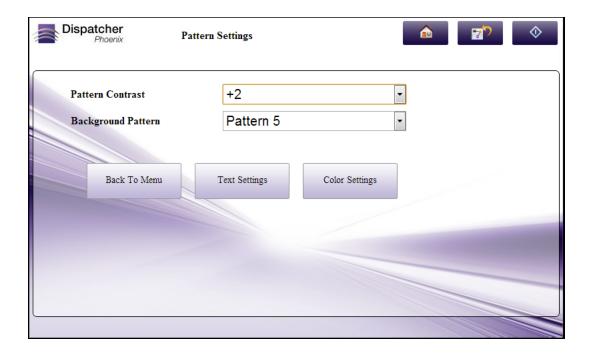


- When you are done, you can choose to return to the main menu screen or modify **Color Settings** or **Pattern Settings** using the buttons at the bottom of the screen.
- Tap on **Color Settings** to change the color of the text/background. See the following illustration:

Konica Minolta 640 / 1597



- When you are done, you can choose to return to the main menu screen or modify **Text Settings** or **Pattern Settings** using the buttons at the bottom of the screen.
- Tap on Pattern Settings to modify the background pattern and contrast. See the following illustration:



• When you are done, you can choose to return to the main menu screen or modify **Text Settings** or **Color Settings** using the buttons at the bottom of the screen.

Release2Me



Konica Minolta 641 / 1597

Although the Release2Me system workflow provides basic functionality for printing jobs to a queue for future release at an MFP, you also can create workflows with additional Dispatcher Phoenix functionality that also use Release2Me capabilities. In this case, instead of using the System Workflow, you can create your own Release2Me workflow using other processing nodes with the **Release2Me Node**.

Release2Me also comes with advanced print reporting and print delegation features to help monitor printer usage and secure printouts.

Note: Accessing the Release2Me feature is supported only on MFPs running a Graphical User Interface (GUI).

To open the Release2Me Node window, add a process node for Release2Me and double-click on it.



- **Enabled** To enable this node in the workflow, check the box here. To ignore this node, leave the box blank. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- Node Name Enter a meaningful name for the Release2Me node.
- **Description** Enter a description for the Release2Me node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the Release2Me Process Node

To configure the Release2Me node, you must specify which MFPs you would like to use with the Release2Me solution.

In addition, optional settings are also available. You can:

- Configure whether or not Dispatcher Phoenix should delete unclaimed jobs in the queue automatically, and the number of days after which print jobs will be deleted from the queue.
- · Customize the Print Queue with additional information about each print job.
- Associate an **Index Form** to be accessed at the panel after a print job is released.

Specifying MFPs for Release2Me

Konica Minolta 642 / 1597

To specify the MFPs to use for the Release2Me solution, do the following:

- Make sure your MFPs are registered using the MFP Registration Tool. You can access the MFP Registration tool directly from the Release2Me node by clicking on the Launch MFP Registration Tool button. The Available Registered MFPs area displays all of the MFP devices that have been registered for use with Release2Me and other workflows.
- 2. Move the MFP icon(s) from the **Available Registered MFPs** area to the **Selected MFPs** box by doing one of the following:
 - Drag-drop the MFP icons.
 - Select one or more MFP icons, then select the Add MFP button.
 - Check the All box to select all MFPs listed, then select the Add MFP button.
- 3. Select MFP Groups Use this area to add any pre-assembled MFP group to any workflow without having to stop and edit anything.

Advanced Settings

To configure optional advanced settings for the Release2Me node, select the **Advanced Settings** button. The following advanced settings are available:

- Delete Unclaimed Jobs To automatically delete unclaimed jobs in the queue, check the box. Otherwise, leave the box blank. If you check the box, the After __ Days field activates.
 - · After _ Days Specify the number of days after which print jobs will be deleted from the queue.
- Custom Column Use this field to display additional information about each print job in the Print Queue. By default, the Release2Me queue displays the following information for each print job:
 - · file name
 - · submitted date
 - o total number of pages
 - file size

You can use metadata to add additional information about the print job. Do the following:

Browse for metadata - Click on this button next to the **Custom Column** field. The Metadata Browser window appears. Find and select the metadata that you are interested in, and then drag it over to the **Custom Column** field. You can add multiple metadata variables to this field.

• Close - Click this button to keep your changes.

Associating an Index Form with Release2Me

You can also customize your workflow to allow the MFP user to access an **Index Form** at the panel after the print job has been released. For example, you may want to allow the MFP user to specify print settings at the panel. In this case, you would associate a PJL Print Preferences Index Form with the Release2Me node.

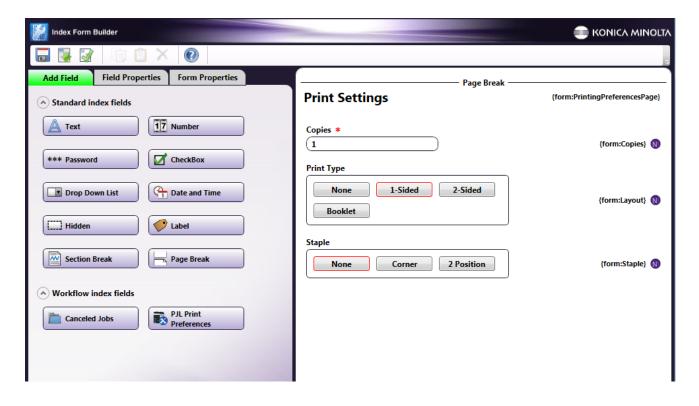
Do the following:

- 1. Check the Attach Index Form box.
- 2. Select the (+) button (Add new index form) to launch the Index Form Builder.
- 3. On the Create new index form pop-up window, select the Blank Index Form button.
- 4. The Workflow index fields area display all nodes available to automatically build your index form. For example, if you have a **PJL Print Preferences** node in the workflow, an associated button will appear in this area, as in the following illustration:

Konica Minolta 643 / 1597



5. Drag-drop the **PJL Print Preferences** button to the canvas area of the Index Form Builder. Pre-configured fields appear, as in the following illustration:



Building A Release2Me Workflow

Konica Minolta 644 / 1597

Along with a system-defined workflow, the Release2Me solution comes with an LPR In node, the PJL Print Preferences node, and Dispatcher Phoenix Release2Me Print Driver. Typically, a Release2Me workflow would include the following:

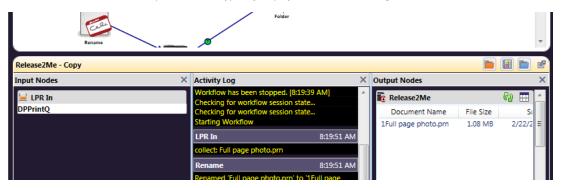
- An LPR In node, which has been customized with a Queue name of DPPrintQ.
- A Release2Me node.
- · A PJL Print Preferences node.
- A Printer node for distribution. To ensure that files are printed out on the MFP that the user is currently using, the Printer node should be customized with the {release:to} metadata.
- Another distribution node to collect canceled jobs.

The Release2Me process is a decision node, which means you need to set up Yes / No transitions from the Release2Me node to ensure that the documents, once released at the MFP, go to their correct destination.

- Once released, the document will go out on a Yes transition.
- If the user chooses to cancel the job, the document will follow the No transition.

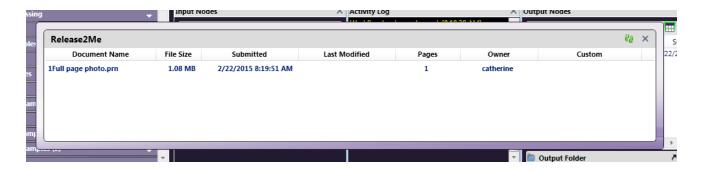
Release2Me Activity Panel

Once a workflow with Release2Me capabilities begins, the Print Queue is listed in the right-hand side of the Activity panel of the main application screen, where the rest of the Output Nodes are typically displayed, as in the following illustration:



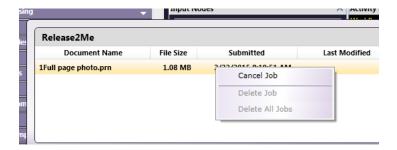
Do the following:

- Click on the **Refresh** button to update the print jobs that are listed in the Print Queue here.
- Click on the **Show Detailed Print Queue** button to display more information about the print jobs in a larger, detachable window, as in the following illustration:



- To close the **Detailed Print Queue** view, click on the **X** button on the top right hand corner of the window. You can also refresh the contents by clicking on the Refresh button.
- Right-click on a print job listed here to either cancel or delete that specific job from the Print Queue or delete ALL jobs from the Print Queue. See the following illustration:

Konica Minolta 645 / 1597



- Choose the Cancel Job option to cancel that specific print job. The file will go out on the No transition.
- Choose the **Delete Job** option to permanently delete that specific print job from the Print Queue.
- Choose the **Delete All Jobs** option to permanently delete all existing print jobs held in the Print Queue.

Note: Print jobs are automatically deleted from the Print Queue if the Release2Me node is deleted from the workflow, or the workflow with the Release2Me node is deleted from your system.

Release2Me at the MFP

Once your Release2Me workflow is running, you can send a print job into the workflow using the Dispatcher Phoenix Release2Me Printer. Then, at the MFP, you should see your workflow with all jobs held in queue.

Release2Me Metadata Variables

If your workflow contains a Release2Me node, you can access and use Release2Me variables in other nodes within the workflow. Release2Me variables have a group name of {release:}. The following are available via the Metadata Browser:

Metadata Value	Description
{release:from}	The IP address of the bEST server that the print job is releasing from.
{release:is_production}	This value will be true if the print job is released from a production print device.
{release:is_simulator}	This value will be true if the print job is released using the MFP Simulator.
{release:mac}	The MAC address of the MFP device.
{release:to}	The IP address of the device that the print job is releasing to.
{release:user}	The name of the user who is releasing the print job.
{release:source}	The value is either the bEST or DPP Client based on the User Interface that is used to release/cancel the job.

Release2Me Print Delegation

Release2Me includes a print delegation feature.

Rx Shield



Rx Shield provides a secure prescription printing solution that complies with federal mandates for tamper-resistant prescriptions. The Rx Shield process does the following:

- Adds a customizable Security Features Listing box to the bottom of the prescription.
- Prints a copy security background pattern in the document. Text such as "Invalid Copy" or "Unauthorized" appears when the prescription is improperly copied. As an option, you can also add the date/time, distribution control number, serial number, and job number to the text, if needed. Unauthorized copying is deterred when security warning text, such as "Copy" or "Private," appears as a visible stamp on the copied prescription.

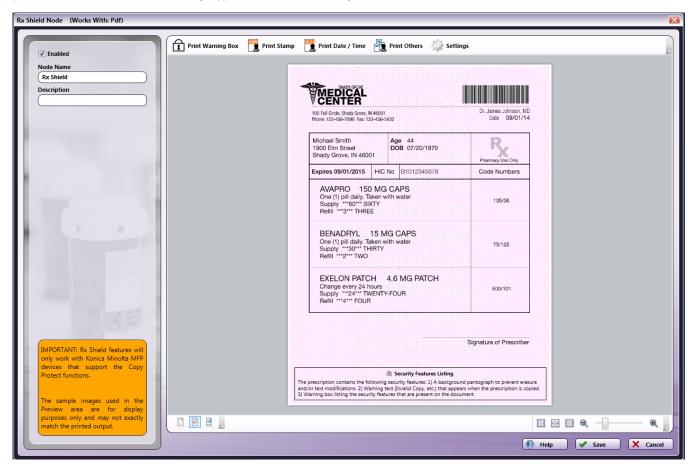
Files processed by this node must be sent to Konica Minolta devices that support Copy Protection features via the Printer node. Make sure that the MFP has the PDF interpreter that supports the version of PDF that you are sending.

Konica Minolta 646 / 1597

Notes:

- · This node works with PDF files.
- These features work only with Konica Minolta MFP devices that support Copy Protection.
- The sample images used in the Preview Area are for display purposes only and may not match the printed output exactly.
- You may have to tweak the Rx Shield settings for your specific MFP in order for the security warning text to appear properly once a prescription is illegally copied.

To open the *Rx Shield Node* window, add a process node for *Rx Shield* and double-click on it. You will see a sample prescription displayed in the preview area with default Rx Shield settings applied to it, as in the following illustration:



To get started with this node, do the following:

- 1. Check the **Enabled** box so that the process will be run. When unchecked, this process will be ignored. Documents will pass through as if the node was not present (i.e., continue along the default or 'positive' path). Note that a disabled node will not check for logic or error conditions.
- 2. In the **Node Name** field, enter a meaningful name for the Rx Shield node.
- 3. In the **Description** field, enter a description for the Rx Shield Node. This is not required, but helpful to distinguish one process from another. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. To use this node, you can do the following:
 - Customize the Security Features Listing Box. See below for more information.
 - Choose the stamp (either preset or registered on the MFP) that will appear when the prescription is improperly copied. The stamp that you
 specify will be printed in the background pattern as concealed text. When the prescription is copied, the concealed text appears on the
 entire page, indicating that it is an unauthorized copy.
 - Add the date (with time as an option) stamp to copied prescriptions. See the "Add Date/Time" section on page 381 for more information.
 - Add the Job Number, Serial Number, and Distribution Control Number stamp to copied prescriptions.
 - Customize the text/background pattern.
 - · Display different sample documents in the Preview area.

Konica Minolta 647 / 1597

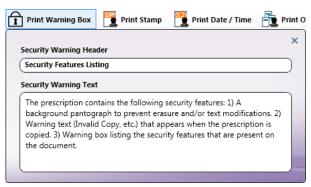
Note: You can print multiple stamps (e.g., preset stamp, registered stamp, date/time, job number, serial number) at a time; however, the number of stamps that can be printed may be limited depending on the type and angle of the selected stamps.

5. When you are done, select the **Save** button to save your changes and close the node.

Customize the Security Features Listing Box

One of the federal requirements for a secure prescription printing solution is to ensure that the prescription is counterfeit-resistant. To address this requirement, Rx Shield automatically prints a warning box at the bottom of the prescription. This box includes all the security features that have been added to the prescription by Rx Shield. You can customize the header and warning text in this box by doing one of the following:

 Select the Print Warning Box button on the top menu bar; a drop-down palette will appear, allowing you to edit the Security Warning Header and Security Warning Text, as in the following illustration:



The edited text will automatically appear on the preview sample document; when done, click out of the drop-down palette or click on the **X** on the top right-hand side to close it.

• Click in the Security Features Listing box displayed on the sample document in the Preview area; then edit the Security Warning Header (default is "Security Features Listing") and/or the Security Warning Text directly in the Preview area.

Note: If you remove all Security Warning Text from the sample document in the Preview area, you must select the Print Warning Box button on the top menu bar to enter new text.

Customize Stamps

To customize the default stamp that will reveal itself when the prescription is copied, select the Print Stamp button on the top menu bar; a drop-down palette will appear, allowing you to choose either preset stamps or custom stamps that have been defined on the MFP, as in the following illustration:



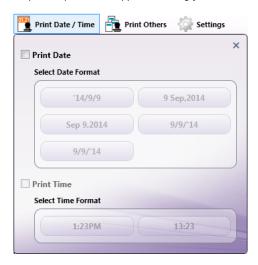
Do the following:

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- 1. This feature is enabled by default. If you do not want any text printed on the prescription, uncheck the **Enable this feature** box.
- To choose a preset stamp, click on the Print Preset Stamp radio button; then choose one of the buttons listed: Invalid Copy, Copy, Invalid,
 Private, Unauthorized, Draft, Confidential, or Illegal Copy. The words that you selected will automatically appear on the sample document
 in the Preview Area.
- 3. To choose a custom stamp that was defined on the MFP, click on the **Print Registered Stamp** radio button. The text registered on the MFP appears as "Machine Setting 1," "Machine Setting 2," etc. Choose one of the buttons listed. Although the sample document in the Preview Area will not display the correct stamp, the actual stamp corresponding to the Machine Setting that you selected will print on the document when the workflow runs.
- 4. When done, click out of the drop-down palette or click on the X on the top right-hand side to close the palette.

Add Date/Time

To add a date/time stamp to the text that will reveal itself when the prescription is copied, select the **Print Date/Time** button on the top menu bar; a drop-down palette will appear, allowing you to choose and format the date/time for the document, as in the following illustration:



Do the following:

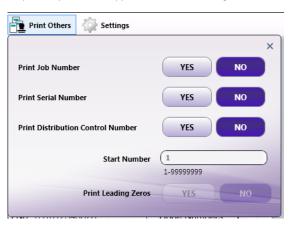
- 1. This feature is disabled by default. If you do want to add the date (optionally including the time as well) to the prescription, check the **Print Date** box. The Select Date Format buttons now become active. Choose a format for the date by selecting one of the buttons listed below. Note that the buttons reflect the current date.
- 2. After selecting a Date format, you can choose to add the Time as well. Check the **Print Time** box. The Select Time Format buttons now become active. Choose a format for the time by selecting one of the buttons listed.

The settings that you choose will appear automatically on the sample document in the Preview Area.

3. When done, click out of the drop-down palette or click on the ${\bf X}$ on the top right-hand side to close the palette.

Add Job Number, Serial Number, Distribution Control Number

To add the job number, serial number, and/or distribution control number to the document, select the **Print Others** button on the top menu bar; a drop-down palette will appear, as in the following illustration:



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Do the following:

- 1. To add the job number managed by the printer, select the Yes button next to Print Job Number.
- 2. To add the serial number programmed on the printer, select the Yes button next to Print Serial Number.
- 3. To add copy numbers when printing multiple sets of copies, select the Yes button next to Print Distribution Control Number. You can specify the starting number for this number in the Start Number field. You can also specify that zeros should be placed in front of the Distribution Control Number by selecting the Yes button next to Print Leading Zeros.

The settings that you choose will appear automatically on the sample document in the Preview Area.

4. When done, click out of the drop-down palette or click on the X on the top right-hand side to close the palette.

Customize Settings

To modify settings for the stamps and background security pattern, select the **Settings** button on the top menu bar; a palette on the right-hand side of the window will appear, as in the following illustration:



Note: Most of the changes that you make will be automatically applied to the sample document in the Preview Area.

Do the following:

- 1. To revert changes back to the default Color settings, select the **Color** button under **Click to restore defaults for**. Default color settings are: "Invalid Copy" stamp, Standard text size, Dark density, Magenta background, Pattern in front, 0° angle, Background Pattern #7, Embossed text, +2 pattern contrast.
- 2. To revert changes back to the default Black & White settings, select the **B&W** button under **Click to restore defaults for**. Default black and white settings are: "Invalid Copy" stamp, Standard text size, Dark density, Black background/text, Pattern in front, 0° angle, Background Pattern

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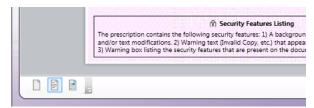
- #4, Embossed text, +2 pattern contrast.
- 3. To modify the text size, select the Small, Standard, or Large button under Text Size.
- 4. To modify the density of the background pattern, select the Light, Normal, or Dark button under Density.
- 5. To select text and background colors, choose a color button (Black, Cyan, or Magenta) under Text / Background Color.
- 6. To select whether the pattern is added to the background or foreground of the document, choose **Front** or **Back** under **Pattern Overwrite**. Note that these options will not be visible on the sample document in the Preview Area.
- 7. To modify the angle of the text, choose the appropriate button under **Angle**, as follows:



- 8. To select the pattern to be applied when the prescription is improperly copied, choose a pattern button under **Background Patterns**.
- 9. To specify the contrast of the background pattern, choose the following under Pattern Style:
 - Emboss Text Text pattern will appear embossed when the prescription is improperly copied.
 - Emboss Background Text pattern will appear as an outline when the prescription is improperly copied.
- 10. To adjust the contrast between the background pattern and the text, choose a number button under Pattern Contrast.
- 11. To close the palette, click on the ${\bf X}$ on the top right-hand side to close the palette.

Customize Preview Area

This node comes with two sample documents that are displayed in the Preview Area. The toolbar at the bottom of the window allow you to choose which sample document to preview. See the following illustration:



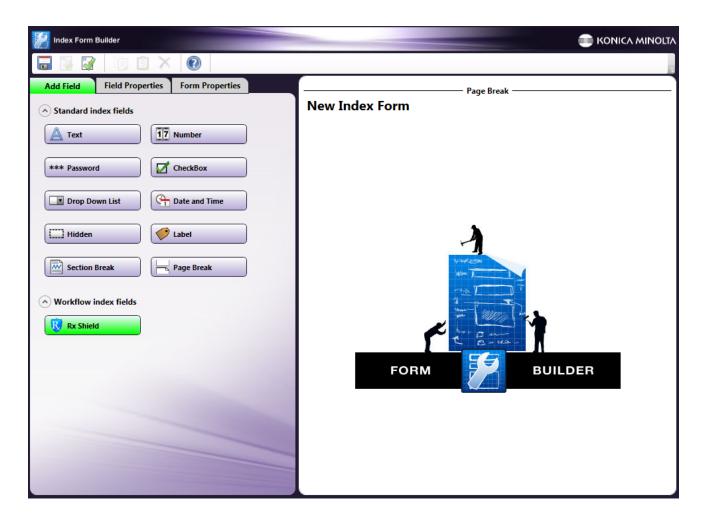
Using Rx Shield At The MFP

You can also modify Rx Shield settings at the MFP by first attaching an Rx Shield Index Form to the MFP Panel node in your workflow; then, at the MFP, you can access that workflow and specify new settings for the Rx Shield process.

Do the following:

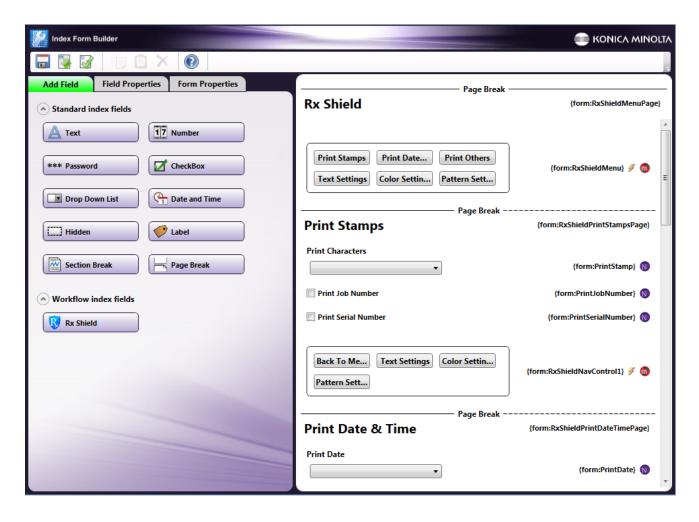
- 1. Set up a workflow with a MFP Panel node and Rx Shield node.
- 2. Check the Attach Index Form box; then select the + icon (Add new index form).
- 3. When prompted, choose to Create New Blank Index Form.
- 4. You should see an **Rx Shield** button under the Workflow index fields area on the left-hand side of the Index Form Builder, as in the following illustration:

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5. Drag-drop the **Rx Shield** button to the right-hand side of the Index Form Builder. The appropriate Index Form fields should automatically appear, as in the following illustration:

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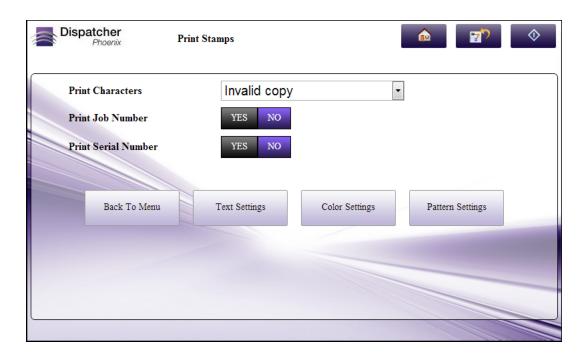
6. At the MFP panel, run the Rx Shield workflow; then tap on the **Rx Shield** icon to customize secure prescription printing settings. You should see the following screen:



7. Here, you can do the following:

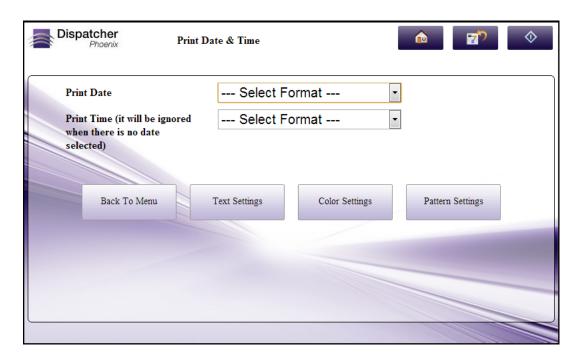
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• Tap on **Print Stamps** to choose the text that you want added to the security pattern that is applied to the document, and whether or not to add the Job Number and Serial Number as well. See the following illustration:



When you are done, you can choose to return to the main menu screen or modify Text Settings, Color Settings, or Pattern Settings using the buttons at the bottom of the screen.

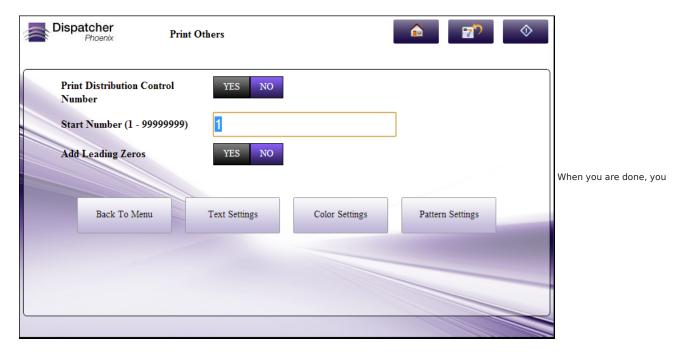
• Tap on **Print Date & Time** to add the Date (and Time, if necessary) to the security pattern that is applied to the document. See the following illustration:



When you are done, you can choose to return to the main menu screen or modify Text Settings, Color Settings, or Pattern Settings using the buttons at the bottom of the screen.

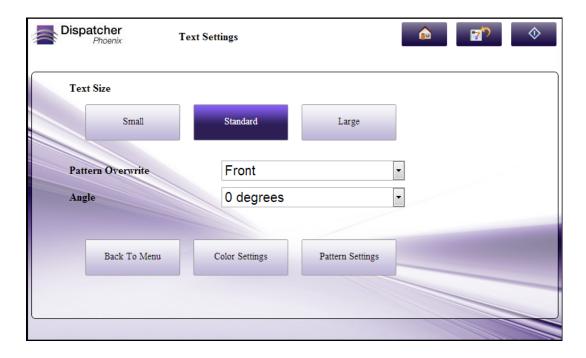
• Tap on **Print Others** to add the Distribution Control Number to the security pattern that is applied to the document. See the following illustration:

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can choose to return to the main menu screen or modify Text Settings, Color Settings, or Pattern Settings using the buttons at the bottom of the screen.

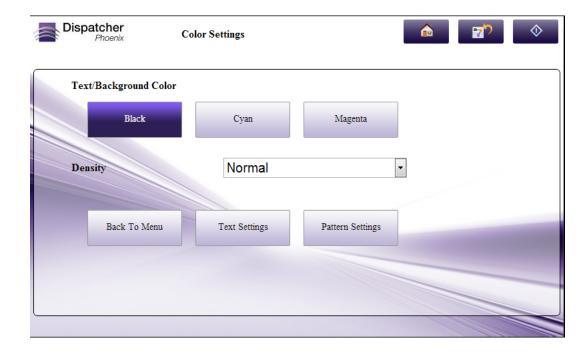
• Tap on **Text Settings** to format the text and pattern. See the following illustration:



When you are done, you can choose to return to the main menu screen or modify Color Settings or Pattern Settings using the buttons at the bottom of the screen.

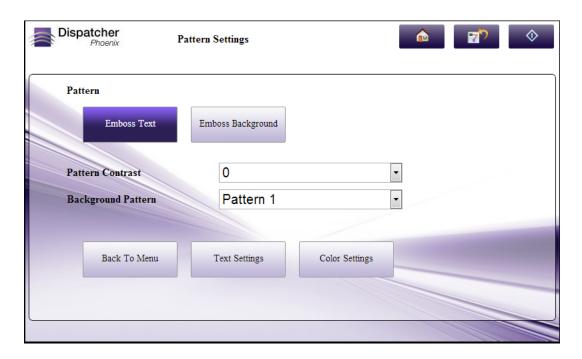
• Tap on Color Settings to change the color and density of the text and background. See the following illustration:

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When you are done, you can choose to return to the main menu screen or modify Text Settings or Pattern Settings using the buttons at the bottom of the screen.

• Tap on Pattern Settings to modify the background pattern. See the following illustration:



When you are done, you can choose to return to the main menu screen or modify Text Settings or Color Settings using the buttons at the bottom of the screen.

Production Print

Overview of Production Printing

Konica Minolta's Production Print feature provides an efficient and streamlined document capturing process to help organizations automate previously time-consuming tasks such as manually separating and distributing jobs through existing workflows and processes.

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Production Print includes a variety of processing tools to power both simple and custom workflows. Print operators can quickly and easily set up simple imposition workflows to automatically collect files from their web service to impose and print the correct quantity without manual intervention. Processes that normally take 10+ clicks or more to complete are now as simple as running a Production Print workflow.

You can create workflows to evaluate and customize print files. Jobs that normally involved several manual steps can now be automatically processed or routed based on the color content of the file, number of pages, and the metadata available. Preflight then automatically checks and troubleshoots a file while the JDF tools allow job ticket information to be converted, parsed, and modified before being transferred to another make-ready or output management platform.

Advanced, dynamic job-routing operations send files through appropriate processing tasks such as imposition, tab creation, inserting color bars, trim marks, etc. Production Print can send documents to a variety of other destinations, such as:

- Folders
- Production Presses for Printing
- FTP and SFTP servers
- Email recipients
- Popular document management systems such as Microsoft SharePoint®

This following table contains links to the various process nodes used in the Production Print process.

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Node	Description	
Bleed Tabs: Bookmarks	Adds bleed tabs to all pages in input PDF file based on PDF bookmarks.	
Bleed Tabs: Merge PDFs	Merges the given input PDF files in the same order as mentioned in metatdata and adds bleed tabs to all pages in each PDF file with file name as tab text.	
Bleed Tabs: User Defined	Adds bleed tabs to all pages in input PDF file per user intention.	
Collating Marks	Adds Collating Title and Collating Marks to inputs based on Imposition node metatdata and user settings.	
Color Bar	Inserts an image into the input document at a specified location.	
Color Route Vector PDF	Routes the PDF document to YES/NO outbound connectors based on the result of color pages condition check given by a user.	
Crop PDF Pages	Crops pages in a PDF document to a specified size.	
Delete PDF Pages	Deletes a fixed range of pages or pages from a PDF document based on the metadata.	
Duplicate PDF Pages	Duplicates specified pages in a PDF document.	
Excel Parser	Parses input Excel/CSV document based on user input condition and routes it to YES/NO outbound connectors based on the result of condition check given by user.	
Ganging	Places multiple printing jobs on a common paper sheet in order to reduce costs and paper waste.	
Imposition	Prints multiple pages of a smaller format on a device that allows a larger format printing in order to reduce the cost of printing and facilitate the making of booklets, business cards, greeting cards, etc.	
Insert PDF Pages	Inserts either pages from a PDF document or empty pages into another PDF document at specified positions.	
Job Ticket Editor	Gets job ticket information from a user and saves it to metatdata.	
Job Ticket Generator: JDF	Creates or updates JDF files with available metatdata values using mapping table file.	
Job Ticket Generator: JSON	Creates or updates JSON files with available metatdata values using mapping table file.	
Job Ticket Generator: XML	Creates or updates XML files with available metatdata values using mapping table file.	
Job Ticket Parser: CSV	Parses the job information in excel files and stores it into metatdata.	
Job Ticket Parser: JDF	Parses JDF files and updates the job ticket information to metatdata using mapping table file.	
Job Ticket Parser: JSON	Parses JSON files and updates the job ticket information to metatdata using mapping table file.	
Job Ticket Parser: XML	Parses XML files and updates the job ticket information to metatdata using mapping table file.	
Move PDF Pages	Moves specified pages in a PDF document to a different position.	
Page Size Route	Routes the PDF document to YES/NO outbound connectors based on the result of condition checks (Standard page dimension)Custom dimension) given by a user.	
Preflight	Performs various checks such as Acrobat Compliance, General, PDF Dialect Compliance and various fixups such as PDF/A, PDF/E, PDF/X Compliance, Digital Printing, Prepress to the input file.	
Resize PDF Pages	Resizes pages in a PDF document to a specified target size.	
Rotate PDF Content	Rotates pages in a PDF document by a specified angle.	
Shift PDF Pages	Shifts the content of pages in a PDF document by a specified amount.	

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Node	Description
Tabs: Bookmarks	Inserts a tab sheet before all the bookmarked pages with bookmark name as tab text.
Tabs: Insert	Inserts a tab sheet with user-specified tab information, which is then available in input metatdata.
Tabs: Merge PDFs	Merges the given input PDF files and inserts a tab sheet before each first page of the file with file name as tab text.
Tabs: Page Shift	Changes the specified pages to a tab sheet and shifts its contents by a user-defined distance.
Tabs: Predefined	Parses all pages in a PDF with the input tab page size and updates tab sheet information into metatdata.
Trim Mark	Adds trim marks to a PDF file to perform precise PostPress works.

Bleed Tabs: Bookmarks



Note: This node works with PDF files (version 1.3 or later) and is intended for use with PDF files that already contain bookmarks.

The **Bleed Tabs: Bookmark Node** takes input PDF files and looks for Tab Text metadata. Bleed Tabs are then added to all pages with the bookmark name Tab Text.

There are two types of bookmarks in a PDF file:

- Page Destination Bookmark: This bookmark points to the page number in the PDF document.
- Named Destination Bookmark: This bookmark points to the name which is defined globally and references a destination page in the PDF document.

If the Bleed Tab page size is not available in the metadata, then the first page size of the input PDF is taken as the Bleed Tab page size. If the document page size and Bleed Tab Page Size do not match, Bleed Tabs may not be added properly, so documents with mixed page sizes may not add Bleed Tabs as expected.

Use this node to specify the **Number of Tabs, Bleed Tab Text, Bleed Tab Height, Bleed Tab Width, Bleed Tab Border Width, Top** and **Gap** margins, **Minimum Bleed Tab Text Height**, and **Bleed Tab Text Gap** values. All changes appear in real-time in the Preview panel.

This node supports three metadata key-value pairs:

- job:tab.paper.w (Optional): The Paper Width of the Bleed Tab sheets.
- job:tab.paper.h (Optional): The Paper Height of the Bleed Tab sheets. Paper Width and Paper Height must be set together. If they are not, the Paper Size applied is based on the size of the first page size of the PDF file.
- job:printtype (Optional): The Print Type of the document (One-Sided or Double-Sided). This is applied to document-level metadata only.

Bleed Tab Order and Document Orientation: The Orientation of the Bleed Tabs defaults to the Orientation of the first page of the input PDF file. If the first page is **Portrait**, the Bleed Tabs are **Portrait**. If the first page is **Landscape**, the Bleed Tabs are **Landscape**. Default values may be modified using the **Bleed Tab Order** options on the settings screen.

Note: The **PDF Media Box** setting defines the page boundary. Bleed Tabs are added accordingly. For example, Letter PDF page (8.5 x 11 inches) is cropped by 2 inches on all four sides as shown below.

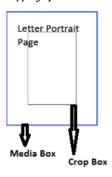
The blue border represents the media box on the PDF and the black box represents the crop box on the PDF page.

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Original Page



Cropping by 2 inches on all four sides



PDF page after the crop is applied

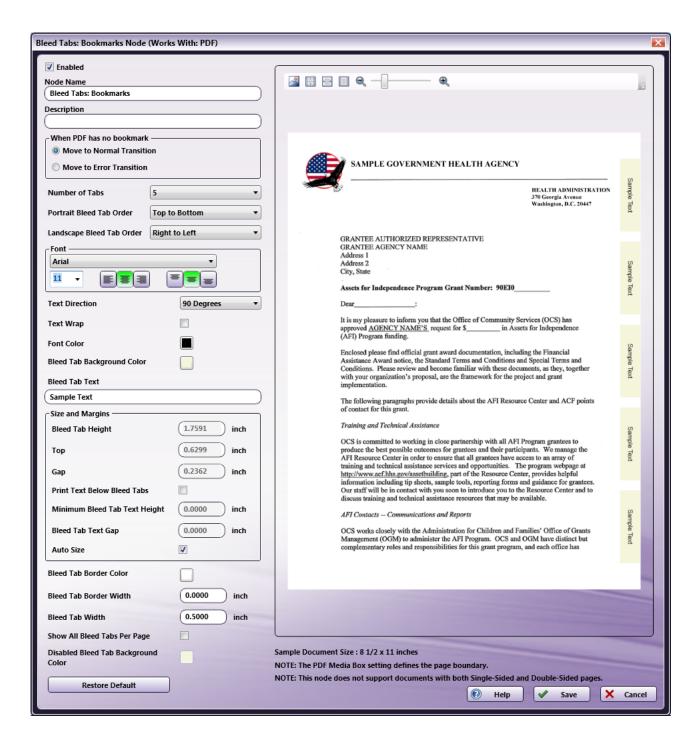


This node will use the **Media Box** boundary for Bleed Tab creation. If created Bleed Tabs fall outside of the crop box, then the Bleed Tabs will not be visible on the PDF page. When such a document is sent to the printer, the printer uses its own, printer-based settings (**Media Box** or **Crop Box**).

Using the Bleed Tabs: Bookmarks Node

Add the Bleed Tabs: Bookmarks Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Bleed Tabs: Bookmarks Node's window:

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Specify the Bleed Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Bleed Tabs: Bookmarks Node.
- In the **Description** field, enter a description for the Bleed Tabs: Bookmarks Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

Select Transition

If the Bleed Tabs: Bookmarks Node receives a PDF file that does not contain Bookmarks, use this setting to tell the workflow what to do with the file:

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- . Move to Normal Transition: even without Bookmarks, the file is sent to the next node in the workflow and processed normally.
- Move to Error Transition: Because the Bookmark application is integral to the processing of the job, files that lack Bookmarks are moved to an Error folder and must be processed manually.

Set the Bleed Tab and its Text Properties

The following sections describe the remaining setting options for the Bleed Tabs.

Number of Tabs

Specify the number of Bleed Tabs for the document from the drop-down.

Portrait Bleed Tab Order

Specify the Portrait Bleed Tab Order for a document using Portrait Orientation:



- Top to Bottom: If the document's Orientation is Portrait, Bleed Tabs are added from the top to the bottom.
- Bottom to Top: If the document's Orientation is Portrait, Bleed Tabs are added from the bottom to the top.

Landscape Bleed Tab Order

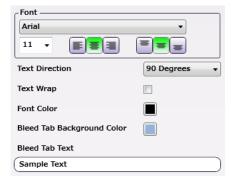
Specify the Landscape Bleed Tab Order for a document using Landscape Orientation:



- Right to Left: If the document's Orientation is Landscape, Bleed Tabs are added from the right to the left.
- Left to Right: If the document's Orientation is Landscape, Bleed Tabs are added from the left to the right.

Bleed Tab Text

In the Tab Text configuration panel, specify the following:



Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the Bookmarks in the original PDF file. If these bookmarks contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

• Font: Choose a Font name and size from the drop-downs. Use the first set of icons to specify the justification of the Bleed Tab text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the Bleed Tab text within the bounding box (top center,

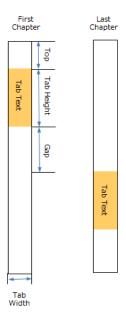
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center, bottom center).

- Text Direction: Specify the orientation of the Bleed Tab text by choosing an option from the drop-down menu.
- Text Wrap: Select the check box to wrap the Bleed Tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Background Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Text: A real-time preview of the Bleed Tabs: Bookmarks Node's text.

Note: The value entered in the **Bleed Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the PDF Bookmarks.

Size and Margins



Use this section to specify the **Height** of the tabs and the **Top** and **Gap** margin values. The **Preview** up-dates in real-time to show how the printed document will look.



- Bleed Tab Height: Specify the Height of the Bleed Tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first bleed tab.
- Gap: Specify the Gap margin value. This is the distance between each Bleed Tab.
- Print Text Below Bleed Tabs: Select the check box to enable printing text below the Bleed Tabs.
- Minimum Bleed Tab Text Height: Specify the minimum Bleed Tab text Height for text outside the Bleed Tab area.
- Bleed Tab Text Gap: Specify the gap between Bleed Tab text area and Bleed Tab area.
- Auto Size: Select to automatically update the values of Bleed Tab Height, Top and Gap when the Number of Tabs value is modified.

Note: If the Document page size and Bleed Tab Page size do not match or if the document has mixed page sizes, the Bleed Tabs might not be added properly.

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Note: If tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Bleed Tab



- Bleed Tab Border Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Border Width: Enter a value to specify a value.
- Bleed Tab Width: The width of the Bleed Tab.
- Show All Bleed Tabs Per Page: Select the check box to enable displaying all Bleed Tabs in the same page itself.

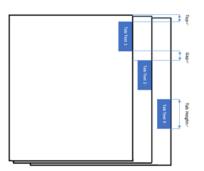
Note: Each page can display only a single Bleed Tab or all Bleed Tabs depending on this setting. When the **Show All Bleed Tabs Per Page** setting is selected, the active Bleed Tab color is different from the other Bleed Tabs.

• Disabled Bleed Tab Background Color: Click to open a color selection option, and then select a color value.

Based on the values of **Print Text Below Bleed Tabs** and **Show All Bleed Tabs Per Page** settings, there are four ways Bleed Tabs can be displayed.

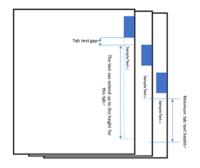
<View 1>

If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are disabled.



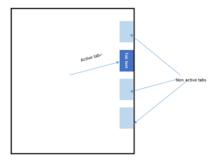
<View 2>

If Print Text Below Bleed Tabs is enabled and Show All Bleed Tabs Per Page is disabled.



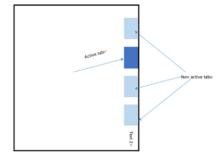
<View 3>

If Print Text Below Bleed Tabs is disabled and Show All Bleed Tabs Per Page is enabled.



<View 4>

If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are enabled.



Restore Default

Use the **Restore Default** button to restore all the default values of the Bleed Tab Settings.

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Print Type Handling

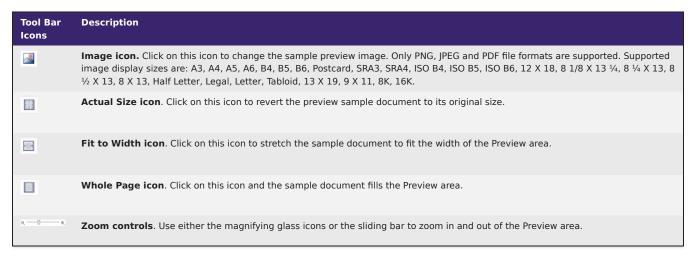
The position of the Bleed Tabs is based on the **Print Type** of the document-level's input metadata:

Orientation vs Print Type	Portrait	Landscape
One-Sided	Bleed Tabs are added at the Right side of the page.	Bleed Tabs are added at the Bottom of the page.
Double-Sided	Bleed Tabs are added at the Right side for odd pages and the Left side for even pages.	Bleed Tabs are added at the Bottom for odd pages and the Top for even pages.

Note: If a document-level **Print Type** value is not included with the input metadata, then the Bleed Tabs: Bookmarks node applies **One-Sided** to the job (**Print Type's** default value). If any mismatch is detected between the document-level and page-level **Print Type** input metadata values, then the Bleed Tabs: Bookmarks Node displays a message in the Activity Log and moves the PDF document to the node's Error folder.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

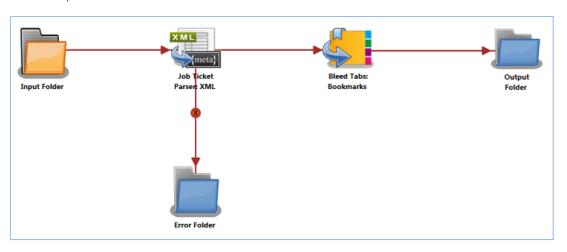


Sample of a Bleed Tabs: Bookmarks Workflow

The purpose of this is to receive XML files, parse the job ticket into XML metadata, and then add Bleed Tabs to all pages with the bookmark name Tab Text in the XML job ticket. The modified file is then sent to an Output Folder.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:



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Input Folder Node: Configure the Input Folder to collect XML job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded job ticket files contain the job ticket attribute information. They also contain the Bleed Tab information. This Bleed Tab information is used when the Bleed tabs are added in the Bleed Tabs: Bookmarks Node. Below is a sample job ticket that contains the Bleed Tab information:

Job Ticket Parser: XML Node: If a document is not formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. Save locally as XML_BleedTab_Bookmark.XML.
- 3. Double-click on the Job Ticket Parser: XML node. The settings screen opens.
- 4. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.

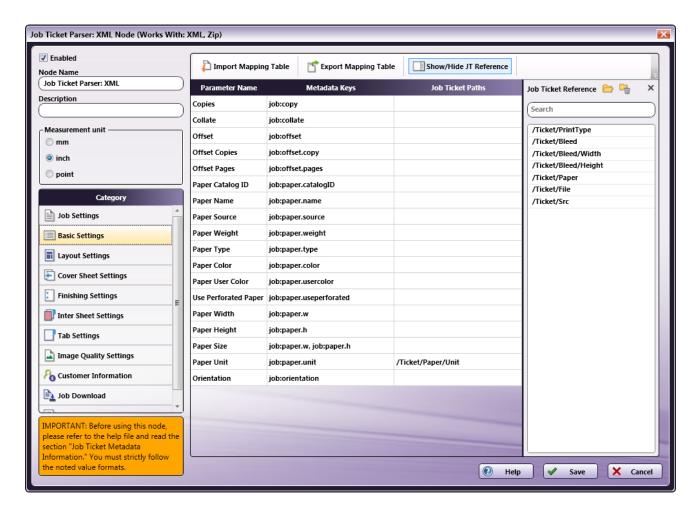
Note: The job ticket referenced above (XML_BleedTabs_Bookmarks.XML) has tab paper size in inches.

5. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:



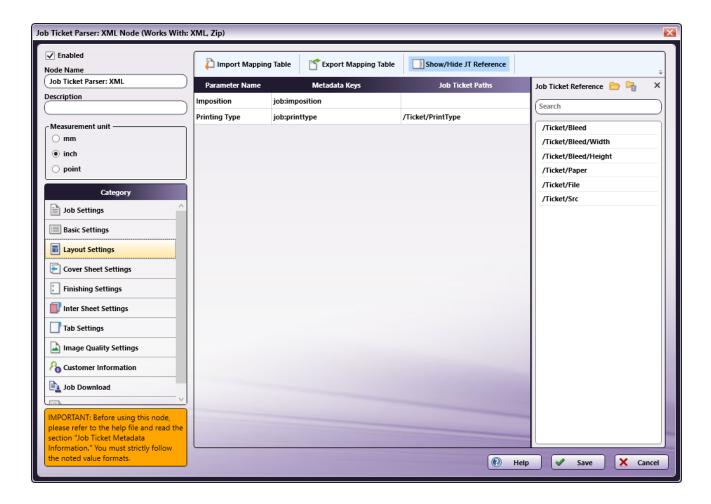
- 6. Click the icon. On the screen that opens, navigate to and select the file saved in Step 2 above (XML_BleedTab_Bookmark.XML).
- 7. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel (far-right).
- 8. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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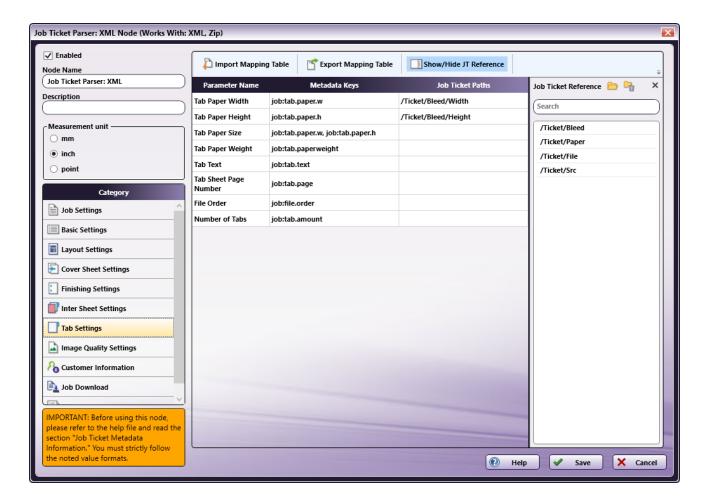
- 9. From the Job Ticket Reference panel, drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 10. In the Category panel (far-left), click on Layout Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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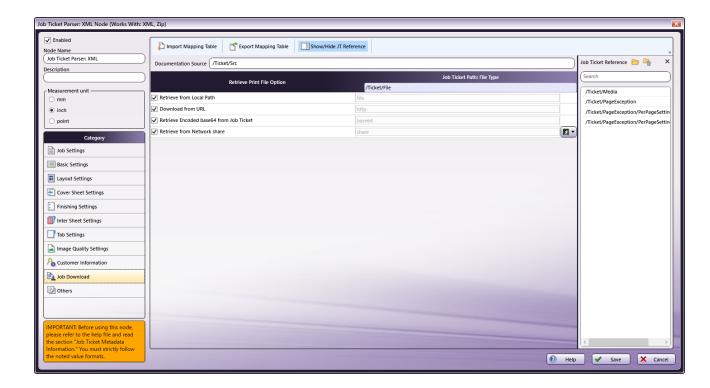
- 11. A value from the **Job Ticket Reference** panel needs to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 12. Drag-and-drop /Ticket/PrintType to the Job Ticket Paths cell of the Printing Type row.
- 13. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 14. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 15. Drag-and-drop /Ticket/Bleed/Width to the Job Ticket Paths cell of the Tab Paper Width row.
- 16. Drag-and-drop /Ticket/Bleed/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 17. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 18. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 19. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 20. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 21. Once these actions are completed, the screen will appear as shown in the image above.
- 22. Click Save to apply the changes to the node.

Bleed Tabs: Bookmarks: The Bleed Tabs: Bookmarks node adds Bleed Tabs to the input document based on the Tab Text metadata found in XML_BleedTabs_Bookmarks.XML.

As an example of how the operation is applied, a file enters the node. It has 10 pages. Page 2 and Page 6 each are assigned Bookmarks. In the output file, the node will place Bleed Tabs for the first bookmark on pages 2 – 5. The node will place Bleed Tabs for the second bookmark on pages 6 – 10.

Output Folder Node: The document (which includes its updated Bleed Tabs) is placed into the folder path that is configured in the Output Folder Node.

Bleed Tabs: Merge PDFs



Note: This node works with PDF files (version 1.3 or later).

The **Bleed Tabs: Merge PDFs Node** is used to merge selected files, and then add a Bleed Tab at the beginning of every merged file. If three original documents are merged into a single file (e.g., 1.PDF, 2.PDF, and 3.PDF), the default name assigned to the combined PDF file is 1.PDF, the name of the first PDF file of the merge. The name of each pre-merged file is used as the text that appears on the Bleed Tabs, so for this example, the Bleed Tabs text will be 1.PDF, 2.PDF, and 3.PDF.

If the Bleed Tab page size is not available in the metadata, then the first page size of the input PDF is taken as the Bleed Tab page size. If the document page size and the Bleed Tab Page Size do not match, Bleed Tabs may not be added properly, so documents with mixed page sizes may not add Bleed Tabs as expected.

Use this node to specify the **Number of Tabs, Bleed Tab Text, Bleed Tab Height, Bleed Tab Width, Bleed Tab Border Width, Top** and **Gap** margins, **Minimum Bleed Tab Text Height**, and **Bleed Tab Text Gap** values. All changes appear in real-time in the Preview panel.

This node supports four metadata key-value pairs:

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- job:file.order (Required): The list of PDF document paths to merge.
- job:tab.paper.w (Optional): The Paper Width of the Bleed Tab sheets.
- job:tab.paper.h (Optional): The Paper Height of the Bleed Tab sheets. Paper Width and Paper Height must be set together. If they are not, the Paper Size applied is based on the size of the first page size of the merged PDF file.
- job:printtype (Optional): The Print Type of the document (One-Sided or Double-Sided). This is applied to document-level metadata only.

Bleed Tab Order and Document Orientation: The Orientation of the Bleed Tabs defaults to the Orientation of the first page of the input PDF file. If the first page is **Portrait**, the Bleed Tabs are **Portrait**. If the first page is **Landscape**, the Bleed Tabs are **Landscape**. Default values may be modified using the **Bleed Tab Order** options on the settings screen.

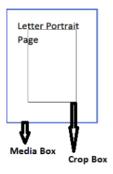
Note: The **PDF Media Box** setting defines the page boundary. Bleed Tabs are added accordingly. For example, Letter PDF page (8.5 x 11 inches) is cropped by 2 inches on all four sides as shown below.

The blue border represents the media box on the PDF and the black box represents the crop box on the PDF page.

Original Page



Cropping by 2 inches on all four sides



PDF page after the crop is applied

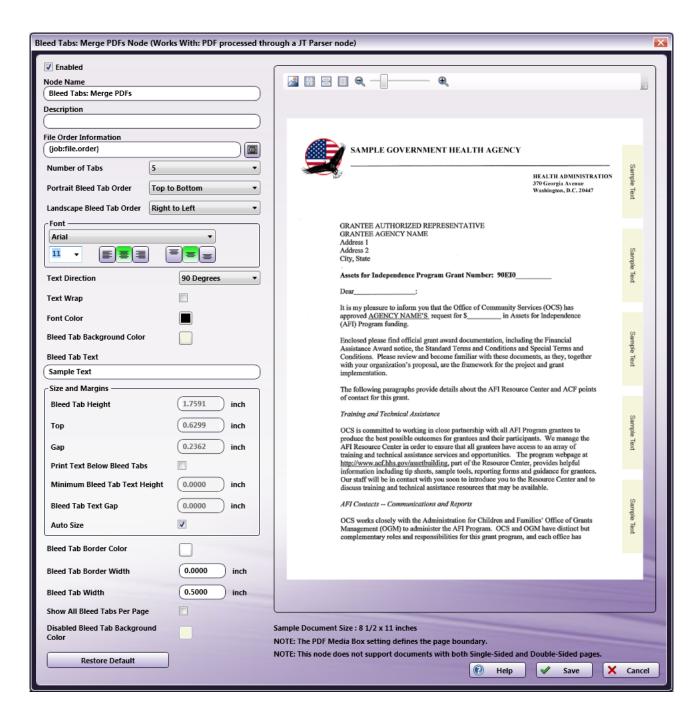


This node will use the **Media Box** boundary for Bleed Tab creation. If created Bleed Tabs fall outside of the crop box, then the Bleed Tabs will not be visible on the PDF page. When such a document is sent to the printer, the printer uses its own, printer-based settings (**Media Box** or **Crop Box**).

Using the Bleed Tabs: Merge PDFs Node

Add the Bleed Tabs: Merge PDFs Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Bleed Tabs: Merge PDFs Node's window:

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Specify the Bleed Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Bleed Tabs: Merge PDFs node.
- In the **Description** field, enter a description for the Bleed Tabs: Merge PDFs Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

File Order Information

Specify the metadata input for the File Order Information.

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Click the **Browse for metadata** button (), then drag and drop **{job:file.order}** metadata key onto the **File Order Information** field. The metadata key can also be manually entered.

Set the Bleed Tab and its Text Properties

The following sections describe the remaining setting options for the Bleed Tabs.

Number of Tabs

Specify the number of Bleed Tabs for the document from the drop-down.

Portrait Bleed Tab Order

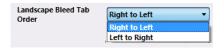
Specify the **Portrait Bleed Tab Order** for a document using **Portrait Orientation**:



- Top to Bottom: If the document's Orientation is Portrait, Bleed Tabs are added from the top to the bottom.
- Bottom to Top: If the document's Orientation is Portrait, Bleed Tabs are added from the bottom to the top.

Landscape Bleed Tab Order

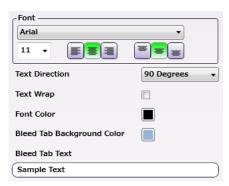
Specify the Landscape Bleed Tab Order for a document using Landscape Orientation:



- Right to Left: If the document's Orientation is Landscape, Bleed Tabs are added from the right to the left.
- · Left to Right: If the document's Orientation is Landscape, Bleed Tabs are added from the left to the right.

Bleed Tab Text

In the Tab Text configuration panel, specify the following:



Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the names in the original PDF files. If these names contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

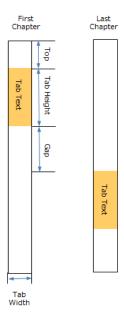
- **Font**: Choose a Font name and size from the drop-downs. Use the first set of icons to specify the justification of the Bleed Tab text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the Bleed Tab text within the bounding box (top center, center, bottom center).
- Text Direction: Specify the orientation of the Bleed Tab text by choosing an option from the drop-down menu.

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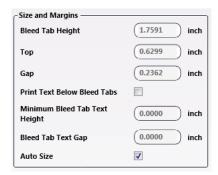
- Text Wrap: Select the check box to wrap for Bleed Tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Background Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Text: A real-time preview of the Bleed Tabs: Merge PDFs Node's text.

Note: The value entered in the **Bleed Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the file names in the input PDF files.

Size and Margins



Use this section to specify the **Height** of the tabs and the **Top** and **Gap** margin values. The **Preview** updates in real-time to show how the printed document will look.



- Bleed Tab Height: Specify the Height of the Bleed Tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first Bleed Tab.
- Gap: Specify the Gap margin value. This is the distance between each Bleed Tab.
- Print Text Below Bleed Tabs: Select the check box to enable printing text below the Bleed Tabs.
- Minimum Bleed Tab Text Height: Specify the minimum Bleed Tab text Height for text outside the Bleed Tab area.
- Bleed Tab Text Gap: Specify the gap between the Bleed Tab text area and the Bleed Tab area.
- Auto Size: Select to automatically update the values of Bleed Tab Height, Top and Gap when the Number of Tabs value is modified.

Note: If the Document page size and the Bleed Tab page size do not match or if the document has mixed page sizes, the Bleed Tabs might not be added properly.

Note: If tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Bleed Tab

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- Bleed Tab Border Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Border Width: Enter a Bleed Tab Border Width value.
- Bleed Tab Width: Enter a Bleed Tab Width value.
- Show All Bleed Tabs Per Page: Select the check box to enable displaying all Bleed Tabs in the same page itself.

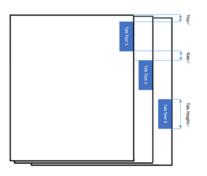
Note: Each page can display only a single Bleed Tab or all Bleed Tabs depending on this setting. When the **Show All Bleed Tabs Per Page** setting is selected, the active Bleed Tab color is different from the other Bleed Tabs.

• Disabled Bleed Tab Background Color: Click to open a color selection option, and then select a color value.

Based on the selected values for the setting options **Print Text Below Bleed Tabs** and **Show All Bleed Tabs Per Page**, there are four different ways the Bleed Tabs will display:

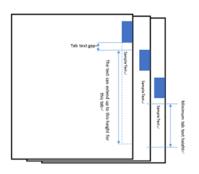
<View 1>

If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are disabled.



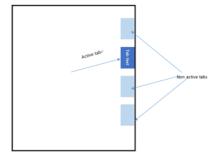
<View 2>

If Print Text Below Bleed Tabs is enabled and Show All Bleed Tabs Per Page is disabled.



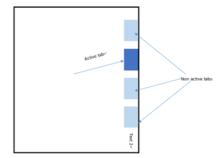
<View 3>

If Print Text Below Bleed Tabs is disabled and Show All Bleed Tabs Per Page is enabled.



<View 4>

If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are enabled.



Restore Default

Use the **Restore Default** button to restore all the default values of the Bleed Tabs: Merge PDFs Node.

Print Type Handling

The position of the Bleed Tabs is based on the **Print Type** value set in the document-level's input metadata:

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Orientation vs Print Type	Portrait	Landscape
One-Sided	Bleed Tabs are added at the Right side of the page.	Bleed Tabs are added at the Bottom of the page.
Double-Sided	Bleed Tabs are added at the Right side for odd pages and the Left side for even pages.	Bleed Tabs are added at the Bottom for odd pages and the Top for even pages.

Note: If a document-level **Print Type** value is not included with the input metadata, then the Bleed Tabs: Merge PDFs Node applies **One-Sided** to the job (**Print Type's** default value). If any mismatch is detected between the document-level and page-level **Print Type** input metadata values, then the Bleed Tabs: Merge PDFs Node displays a message in the Activity Log and moves the PDF document to the node's Error folder.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

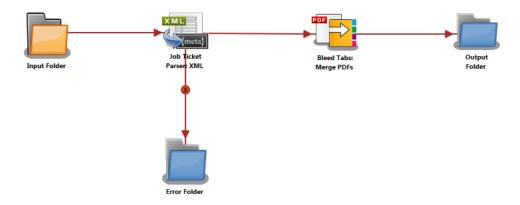
Tool Bar Icons	Description
	Image icon. Click on this icon to change the sample preview image. Only PNG, JPEG and PDF file formats are supported. Supported image display sizes are: A3, A4, A5, A6, B4, B5, B6, Postcard, SRA3, SRA4, ISO B4, ISO B5, ISO B6, 12 X 18, 8 1/8 X 13 1/4, 8 1/4 X 13, 8 1/2 X 13, 8 X 13, Half Letter, Legal, Letter, Tabloid, 13 X 19, 9 X 11, 8K, 16K.
***	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
8	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon and the sample document fills the Preview area.
Q Q	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Sample of a Bleed Tabs: Merge PDFs Workflow

The purpose of this workflow is to receive multiple files then merge them, parse the job ticket into XML metadata, and then add Bleed Tabs to the file in the locations where each merged file begins. Bleed Tabs names are taken from the Chapter Names. The modified file is then sent to an Output Folder.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:



Input Folder Node: Configure the Input Folder to collect job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded job ticket files contain the job ticket attribute information. They also contain the processing order for the submitted files. This order information is used when the files are merged in the Bleed Tabs: Merge PDFs Node. Below is a sample job ticket that contains the file order information:

<Ticket>

<PrintType>Double-Sided</PrintType>

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Job Ticket Parser: XML Node If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. Save locally as XML BleedTabs Merge PDFs.XML.
- 3. Double-click on the Job Ticket Parser: XML node. The settings screen opens.
- 4. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.

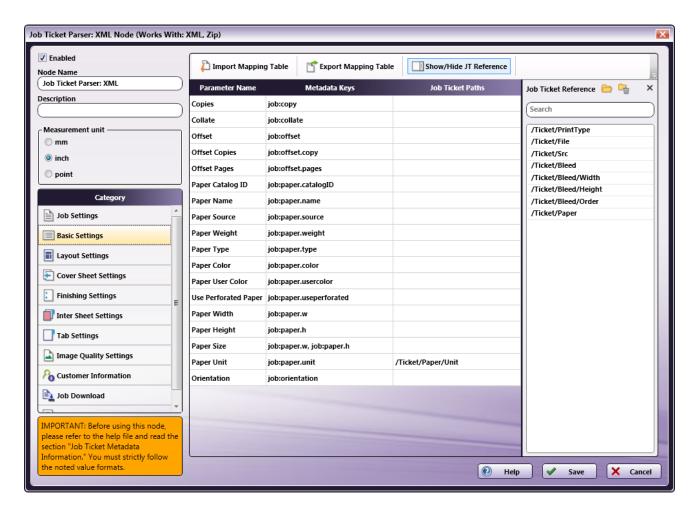
Note: The job ticket referenced above (XML_BleedTabs_Merge_PDFs.XML), has tab paper size in inches.

5. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:



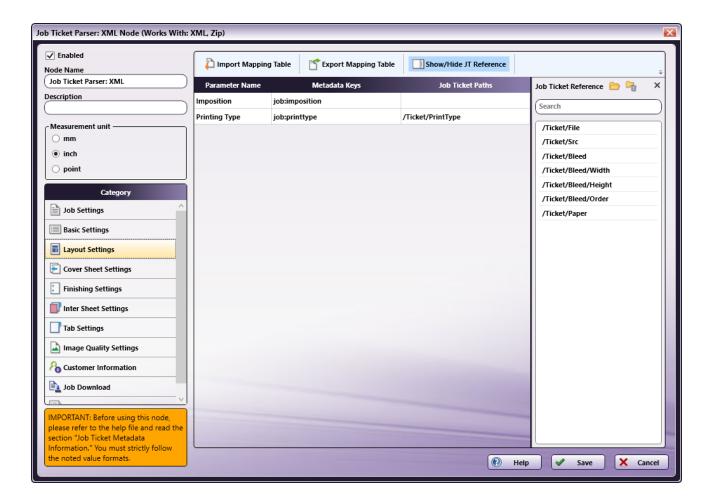
- 6. Click the icon. On the screen that opens, navigate to and select the file saved in Step 2 above (XML_BleedTabs_Merge_PDFs.XML).
- 7. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel (far-right).
- 8. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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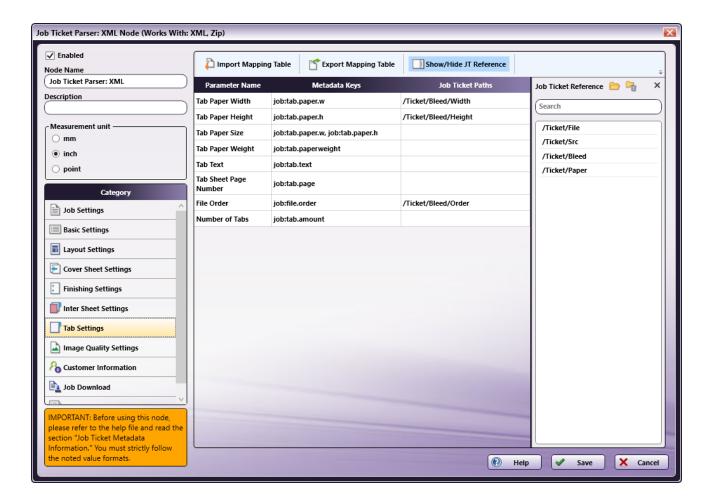
- 9. From the Job Ticket Reference panel, drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 10. In the **Category** panel (far-left), click on **Layout Settings.**The **Parameter Name, Metadata Keys,** and **Job Ticket Paths** columns display in the main panel:

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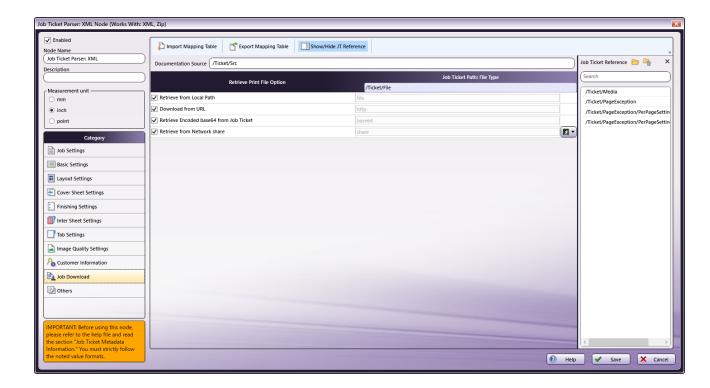
- 11. A value from the **Job Ticket Reference** panel needs to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 12. Drag-and-drop /Ticket/PrintType to the Job Ticket Paths cell of the Printing Type row.
- 13. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 14. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's Parameter Name.
- 15. Drag-and-drop /Ticket/Bleed/Width to the Job Ticket Paths cell of the Tab Paper Width row.
- 16. Drag-and-drop /Ticket/Bleed/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 17. Drag-and-drop /Ticket/Bleed/Order to the Job Ticket Paths cell of the File Order row.
- 18. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 19. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 20. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 21. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 22. Once these actions are completed, the screen will appear as shown in the image above.
- 23. Click Save to apply the changes to the node.

Bleed Tabs: Merge PDFs Node: The **Bleed Tabs: Merge PDFs Node** is used to merge selected files, and then add a Bleed Tab at the beginning of every merged file. If three original documents are merged into a single file (e.g., 1.PDF, 2.PDF, and 3.PDF), the default name assigned to the combined PDF file is 1.PDF, the name of the first PDF file of the merge. The name of each pre-merged file is used as the text that appears on the Bleed Tabs, so for this example, the Bleed Tabs text will be 1.PDF, 2.PDF, and 3.PDF.

Output Folder Node: The document (which includes its updated Bleed Tabs) is placed into the folder path that is configured in the Output Folder Node.

Bleed Tabs: User Defined



Note: This node works with PDF files (version 1.3 or later).

The **Bleed Tabs: User Defined Node** is used add Bleed Tabs to a PDF file. This node identifies the page numbers at the start of each chapter in the PDF file, and then adds a Bleed Tab at the beginning of each chapter. The page numbers of the start of each chapter as well as the Bleed Tab page settings are saved in the metadata.

If the Bleed Tab page size is not available in the metadata, then the first page size of the input PDF is taken as the Bleed Tab page size. If the document page size and the Bleed Tab Page Size do not match, Bleed Tabs may not be added properly, so documents with mixed page sizes may not add Bleed Tabs as expected.

Use this node to specify the **Number of Tabs, Bleed Tab Text, Bleed Tab Height, Bleed Tab Width, Bleed Tab Border Width, Top** and **Gap** margins, **Minimum Bleed Tab Text Height,** and **Bleed Tab Text Gap** values. All changes appear in real-time in the Preview panel.

This node supports five metadata key-value pairs:

• job:tab.page (Required): The list of pages where insert Bleed Tab sheets are added.

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- job:tab.text (Required): The list of Bleed Tab sheets and their text. The number of job:tab.text items must match the number of Bleed Tab pages.
- job:tab.paper.w (Optional): The Paper Width of the Bleed Tab sheets.
- job:tab.paper.h (Optional): The Paper Height of the Bleed Tab sheets. Paper Width and Paper Height must be set together. If they are not, the Paper Size applied is based on the size of the first page size of the PDF file.
- job:printtype (Optional): The Print Type of the document (One-Sided or Double-Sided). This is applied to document-level metadata only.

Bleed Tab Order and Document Orientation: The Orientation of the Bleed Tabs defaults to the Orientation of the first page of the input PDF file. If the first page is **Portrait**, the Bleed Tabs are **Portrait**. If the first page is **Landscape**, the Bleed Tabs are **Landscape**. Default values may be modified using the Bleed Tab Order options on the settings screen.

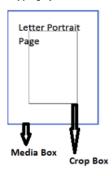
Note: The **PDF Media Box** setting defines the page boundary. Bleed Tabs are added accordingly. For example, Letter PDF page (8.5 x 11 inches) is cropped by 2 inches on all four sides as shown below.

The blue border represents the media box on the PDF and the black box represents the crop box on the PDF page.

Original Page



Cropping by 2 inches on all four sides



PDF page after the crop is applied

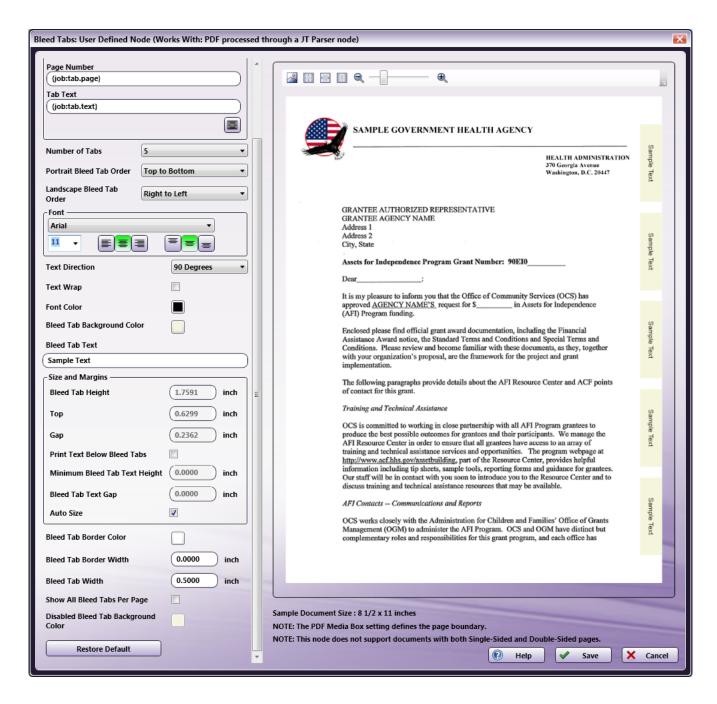


This node will use the **Media Box** boundary for Bleed Tab creation. If created Bleed Tabs fall outside of the crop box, then the Bleed Tabs will not be visible on the PDF page. When such a document is sent to the printer, the printer uses its own, printer-based settings (**Media Box** or **Crop Box**).

Using the Bleed Tabs: User Defined Node

Add the Bleed Tabs: User Defined Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Bleed Tabs: User Defined Node's window:

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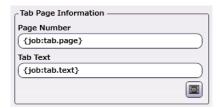
Specify the Bleed Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Bleed Tabs: User Defined node.
- In the **Description** field, enter a description for the Bleed Tabs: User Defined node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

Tab Page Information

Use the Tab Page Information panel to specify the **Page Number** and **Tab Text** metadata keys:

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- Page Number: Click the Browse for metadata button (), then drag-and-drop the {job:tab.page} metadata key onto the Page Number field. The metadata key can also be manually entered.
- Tab Text: Click the Browse for metadata button (), then drag-and-drop the {job:tab.text} metadata key onto the Tab Text field. The metadata key can also be manually entered.

Set the Bleed Tab and the Text Properties

The following sections describe the remaining setting options for the Bleed Tabs.

Number of Tabs

Specify the number of Bleed Tabs for the document from the drop-down.

Portrait Bleed Tab Order

Specify the **Portrait Bleed Tab Order** for a document using **Portrait Orientation:**



- Top to Bottom: If the document's Orientation is Portrait, Bleed Tabs are added from the top to the bottom.
- Bottom to Top: If the document's Orientation is Portrait, Bleed Tabs are added from the bottom to the top.

Landscape Bleed Tab Order

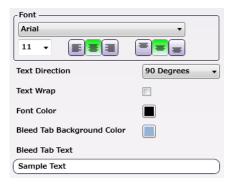
Specify the Landscape Bleed Tab Order for a document using Landscape Orientation:



- Right to Left: If the document's Orientation is Landscape, Bleed Tabs are added from the right to the left.
- Left to Right: If the document's Orientation is Landscape, Bleed Tabs are added from the left to the right.

Bleed Tab Text

In the **Tab Text** configuration panel, specify the following:



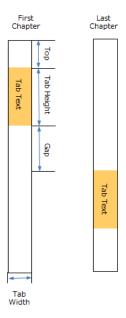
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Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the Chapter Name metadata. If these names contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

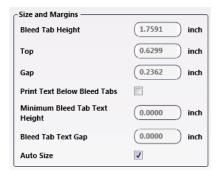
- **Font**: Choose a font name and size from the drop-downs. Use the first set of icons to specify the justification of the Bleed Tab text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the Bleed Tab text within the bounding box (top center, center, bottom center).
- Text Direction: Specify the orientation of the Bleed Tab text by choosing an option from the drop-down menu.
- Text Wrap: Select the checkbox to wrap the Bleed Tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Background Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Text: A real-time preview of the Bleed Tabs: User Defined Node's text.

Note: The value entered in the **Bleed Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the Bleed Tab Text metadata in the PDF file.

Size and Margins



Use this section to specify the **Height** of the tabs and the **Top** and **Gap** margin values. The **Preview** updates in real-time to show how the printed document will look.



- Bleed Tab Height: Specify the Height of the Bleed Tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first Bleed Tab.
- Gap: Specify the Gap margin value. This is the distance between each Bleed Tab.
- Print Text Below Bleed Tabs: Select the check box to enable printing text below bleed tabs.

Note: The Bleed Tab text can be displayed outside of the Bleed Tab area by selecting the **Print Text Below Bleed Tabs** checkbox. For **Portrait**-oriented pages, the Bleed Tab text always prints below the Bleed Tab area. For **Landscape**-oriented pages, the Bleed Tab text always prints to

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the right-side of the Bleed Tab area.

- Minimum Bleed Tab Text Height: Specify the minimum Bleed Tab text Height for text outside the Bleed Tab area.
- Bleed Tab Text Gap: Specify the gap between the Bleed Tab text area and the Bleed Tab area.
- Auto Size: Select to automatically update the values of Bleed Tab Height, Top and Gap when the Number of Tabs value is modified.

Note: If the Document page size and the Bleed Tab page size do not match or if the document has mixed page sizes, the Bleed Tabs might not be added properly.

Note: If tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Bleed Tab



- Bleed Tab Border Color: Click to open a color selection option, and then select a color value.
- Bleed Tab Border Width: Enter a Bleed Tab Border Width value.
- Bleed Tab Width: Enter a Bleed Tab Width value.
- Show All Bleed Tabs Per Page: Select the check box to enable displaying all Bleed Tabs in the same page itself.

Note:Each page can display only a single Bleed Tab or all Bleed Tabs depending on this setting. When the **Show All Bleed Tabs Per Page** setting is selected, the active Bleed Tab color is different from the other Bleed Tabs.

• Disabled Bleed Tab Background Color: Click to open a color selection option, and then select a color value.

Based on the selected values for the setting options **Print Text Below Bleed Tabs** and **Show All Bleed Tabs Per Page**, there are four different ways the Bleed Tabs will display:

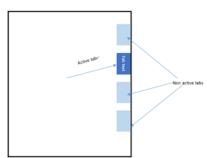
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<View 1> If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are disabled.

Tab feed 2 Tab feed 2

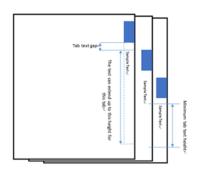
<View 3>

If **Print Text Below Bleed Tabs** is disabled and **Show All Bleed Tabs Per Page** is enabled.



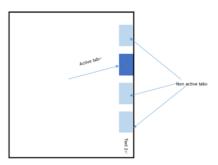
<View 2>

If Print Text Below Bleed Tabs is enabled and Show All Bleed Tabs Per Page is disabled.



<View 4>

If both Print Text Below Bleed Tabs and Show All Bleed Tabs Per Page are enabled.



Restore Default

Use the **Restore Default** button to restore all the default values of the Bleed Tabs: User Defined Node.

Print Type Handling

The position of the Bleed Tabs is based on the **Print Type** value set in the document-level's input metadata:

Orientation vs Print Type	Portrait	Landscape
One-Sided	Bleed Tabs are added at the Right side of the page.	Bleed Tabs are added at the Bottom of the page.
Double-Sided	Bleed Tabs are added at the Right side for odd pages and the Left side for even pages.	Bleed Tabs are added at the Bottom for odd pages and the Top for even pages.

Note: If a document-level **Print Type** value is not included with the input metadata, then the Bleed Tabs: User Defined Node applies **One-Sided** to the job (**Print Type's** default value). If any mismatch is detected between the document-level and page-level **Print Type** input metadata values, then the Bleed Tabs: User Defined Node displays a message in the Activity Log and moves the PDF document to the node's Error folder.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

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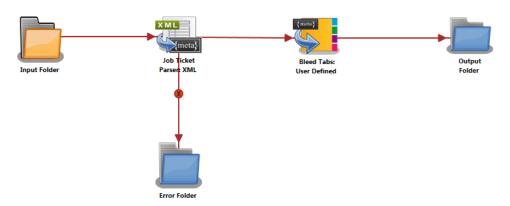
Tool Bar Icons	Description
	Image icon. Click on this icon to change the sample preview image. Only PNG, JPEG and PDF file formats are supported. Supported image display sizes are: A3, A4, A5, A6, B4, B5, B6, Postcard, SRA3, SRA4, ISO B4, ISO B5, ISO B6, 12 X 18, 8 1/8 X 13 1/4, 8 1/4 X 13, 8 1/2 X 13, 8 X 13, Half Letter, Legal, Letter, Tabloid, 13 X 19, 9 X 11, 8K, 16K.
	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon and the sample document fills the Preview area.
Q — — Q	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Sample of a Bleed Tabs: User Defined Workflow

The purpose of this workflow is to receive XML files, parse the job ticket into XML metadata, and then add Bleed Tabs to the file based on the chapter information contained in the XML job ticket. The modified file is then sent to an Output Folder.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:



Input Folder Node: Configure the Input Folder to collect job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded job ticket files contain the job ticket attribute information. They also contain the Bleed Tab information. This Bleed Tab information is used when the Bleed tabs are added in the Bleed Tabs: User Defined Node. Below is a sample job ticket that contains the Bleed Tab information:

```
<Ticket>
        <PrintType>Double-Sided</printType>
        <Bleed>
                <Width>8.5</Width>
                <Height>11</Height>
                <ChapterInfo>
                        <Chapter>1</Chapter>
                        <Chapter>4</Chapter>
                        </Page>
                        <Text>
                        <Chapter>Chapter1</Chapter>
                        <Chapter>Chapter2</Chapter>
                        </Text>
                </ChapterInfo>
        </Bleed>
        <Paper>
                <Unit>inch</Unit>
        </Paper>
        <File>file</File>
        <Src>C:\\test files\\10Pages_Letter.pdf</Src>
</Ticket>
```

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Job Ticket Parser: XML Node If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

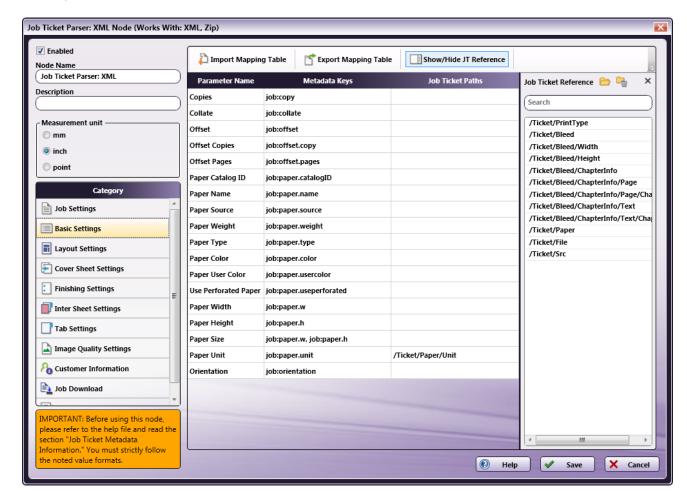
- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. Save locally as XML_BleedTabs_UserDefined.XML.
- 3. Double-click on the Job Ticket Parser: XML node. The settings screen opens.
- 4. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.

Note: The job ticket referenced above(XML_BleedTabs_UserDefined.XML) has tab paper size in inches.

5. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:



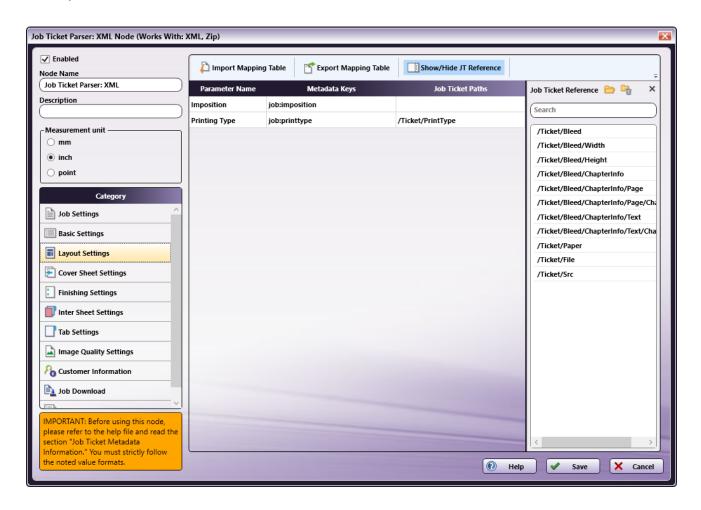
- 6. Click the icon. On the screen that opens, navigate to and select the file saved in Step 2 above (XML_BleedTabs_UserDefined.XML).
- 7. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel (far-right).
- 8. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



9. From the Job Ticket Reference panel, drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.

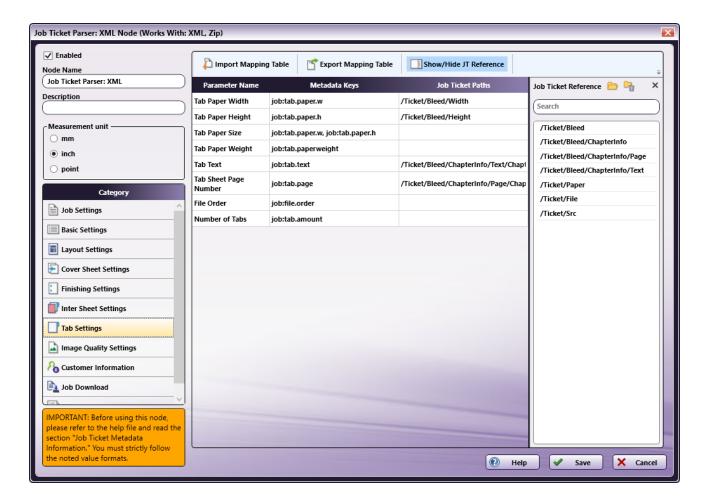
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10. In the Category panel (far-left), click on Layout Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



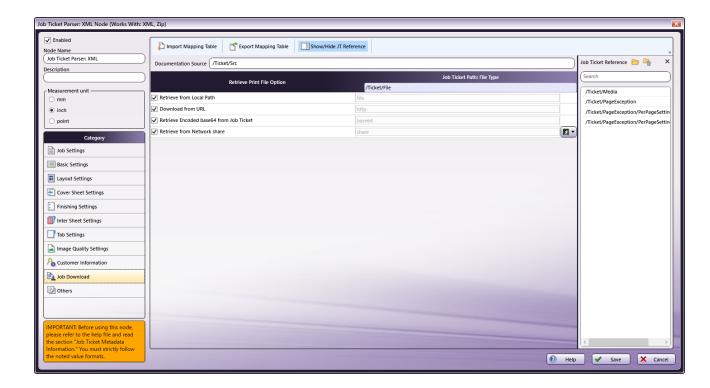
- 11. A value from the **Job Ticket Reference** panel needs to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 12. Drag-and-drop /Ticket/PrintType to the Job Ticket Paths cell of the Printing Type row.
- 13. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 14. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 15. Drag-and-drop /Ticket/Bleed/Width to the Job Ticket Paths cell of the Tab Paper Width row.
- 16. Drag-and-drop /Ticket/Bleed/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 17. Drag-and-drop /Ticket/Bleed/ChapterInfo/Text/Chapter to the Job Ticket Paths cell of the Tab Text row.
- 18. Drag-and-drop /Ticket/Bleed/ChapterInfo/Page/Chapter to the Job Ticket Paths cell of the Tab Sheets Page Number row.
- 19. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 20. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share
- 21. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 22. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 23. Once these actions are completed, the screen will appear as shown in the image above.
- 24. Click **Save** to apply the changes to the node.

Bleed Tabs User Defined Node: The Bleed Tabs: User Defined Node adds Bleed Tabs to the input document based on chapter information in *XML_BleedTabs_UserDefined.XML*. In the job ticket example noted at the beginning of this discussion, page1 and page4 are taken as the chapters and Bleed Tabs are applied accordingly. The file is then sent forward in the workflow.

Output Folder Node: The document (which includes its updated Bleed Tabs) is placed into the folder path that is configured in the Output Folder Node

Collating Marks



Note: This node works with PDF files (version 1.3 or later).

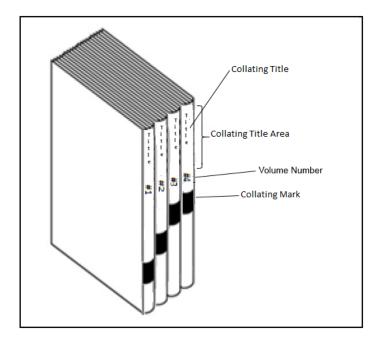
The **Collating Marks Node** is used to apply the Collating Title and Collating Mark values to a PDF file. This node must be used in a workflow that contains an Imposition Node. That node should precede the Collating Marks Node in the workflow. For Collating Marks Node to work as expected, set **Imposition Settings > Imposition Type** to **Booklet** in the Imposition Node. In the Collating Marks Node, set the metadata key value to *postpress:type* in **Line Settings > Print Type.**

Once the Collating Marks are applied to a PDF file, the job is moved to the next node in the workflow.

The image below shows four volumes that are collected together as a series. On the spines of each volume, a title appears at the top. Just below the title is a numeric value. On the lower portion of each spine is a series of ascending bands of color.

The title indicates the name of the series. The number indicates the sequential order of the volumes (Volume Number). The bands provide a graphic representation of the same relational value as the numbers, specifically, the lowest mark is the first in the series and each successive ascending mark provides a visual of the order in which the volumes should be read.

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Collating Mark Settings are specified using the **X Coordinate**, **Y Coordinate**, and **Length** of line segment values. These are specified in the Collating Marks Node UI, under the **Line Settings** section. The method of setting these values changes based on whether the **Use Metadata** checkbox is selected.

Once Line Settings are specified, the Collating Mark Settings may be entered. There are two setting options:

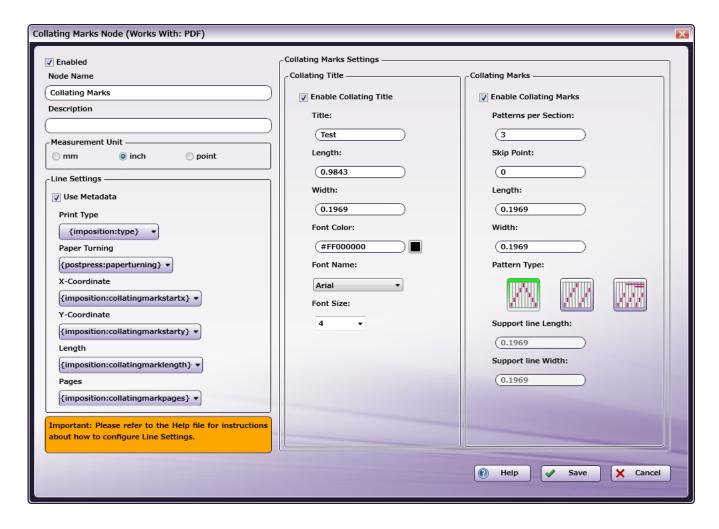
- Collating Title (includes numeric values or Volume Numbers)
- Collating Marks

The **Line Settings** values determine the limitations that apply to the **Collating Mark Settings**. The **Collating Title** (the upper title section of the spine notations) can occupy a maximum of 40% of the spine area. The **Collating Mark** (the lower section of the spine notations) can occupy a maximum of 60% of the spine area.

Using the Collating Marks Node

Add the Collating Marks Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Collating Marks Node's window:

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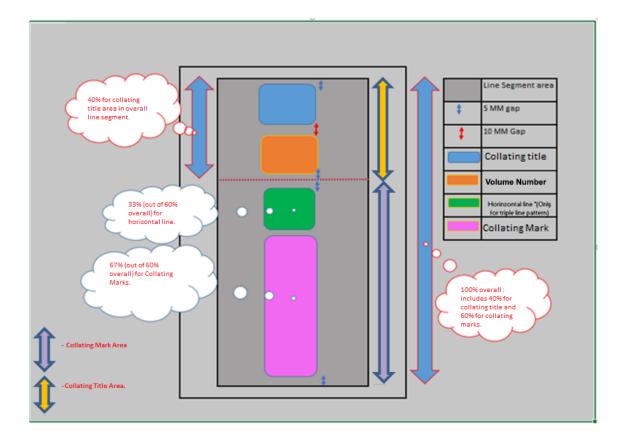
Use this window to specify the Collating Marks Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Collating Marks Node.
- In the **Description** field, enter a description for the Collating Marks Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Measurement Unit** panel, select a measurement unit radio button. Three types of measurement units are available: **mm, inch,** and **point.**
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Collating Marks: Operational Overview

The figure below illustrates the maximum size allowance for each section of the **Collating Marks.** It also shows how the **Collating Title** and **Collating Marks** are arranged on the spine area:

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- The **Line Settings** values determine the limitations that apply to the **Collating Mark Settings**. The Collating Title (the upper title section of the spine notations) can occupy a maximum of 40% of the spine area (and includes the **Volume Number**). The **Collating Mark** (the lower section of the spine notations) can occupy a maximum of 60% of the spine area.
- Volume Number refers to the numeric ID that appears just below the title.
- When the Collating Title and Collating Mark settings exceed the maximum area, the input file will be routed to an ERROR folder and a
 message will be added to the node's Activity log.
- When the **Font Size** does not fit in the **Collating Title** area, the title string is truncated.
- A 5-mm gap is inserted at the top and the bottom of the **Collating Title** area and a 10-mm gap is inserted in-between the **Volume Number** and the **Collating Title**.
- In the Collating Marks area, a 5-mm gap is inserted at the top and the bottom of the area. As a rule, 60% of the spine space is set aside for the **Collating Marks**. However, when the **Triple Line Pattern** is selected, the 60% is further sub-divided: 33% of the area is set for the horizontal line and 67% is set for the **Collating Marks**. For all other pattern options, all 60% of the designated space is used by the Collating Marks.
- The Collating Title Font, Length, Width, Font Color, and Font Size are used for the both the Collating Title and the Volume Number.
- For the Triple line pattern, a 2-mm gap is inserted between support lines.

Line Settings

Specify **Line Settings** using either metadata key values or by manually entering values. To use the metadata key values, select the **Use Metadata** checkbox.

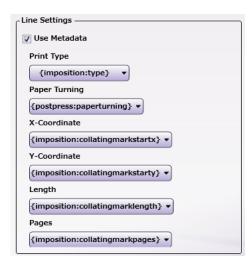


Configuring the Line Settings Using Metadata

Note: These settings only work if the workflow also contains an Imposition Node. That node should precede the Collating Marks Node in the workflow. For the Collating Marks Node to work as expected, set **Imposition Settings > Imposition Type** to **Booklet** in the Imposition Node then follow the setting directions in this sub-section.

When the Use Metadata checkbox is selected, the following UI displays:

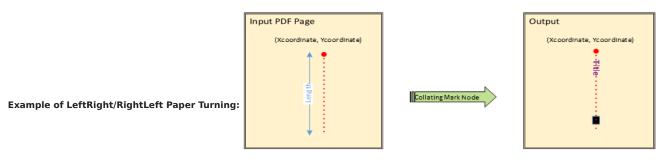
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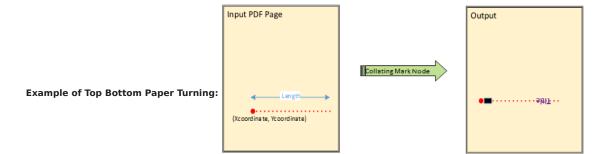


There are six setting values: **Print Type**, **Paper Turning**, **X Coordinate**, **Y Coordinate**, **Length**, and **Pages**. For each, click the **Select metadata key** button to launch a Metadata Browser window. From the window, select a metadata value. Note the following about each of the setting options:

- Print Type: Set the metadata key value to postpress:type.
- Paper Turning: Use to select a metadata key value for the method the paper should be turned to process the Binding settings. The following options are supported:
 - TopBottom: Select to apply Top to Bottom Binding.
 - · LeftRight: Select to apply Left to Right Binding.
 - · RightLeft: Select to apply Right to Left Binding.

The images below note how the metadata values will be applied for the **Paper Turning** values:





Note: The Red lines in the example above are for emphasis only and will not appear in the output.

- **X Coordinate:** Use to select a metadata key value for the line's **X Coordinate**. The metadata value is expressed in postscript points, e.g., 72. The metadata key value *imposition:collatingmarkstartx* must be selected.
- **Y Coordinate:** Use to select a metadata key value for the line's **Y Coordinate**. The metadata value is expressed in postscript points, e.g., 72. The metadata key value *imposition:collatingmarkstarty* must be selected.

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- Length: Use to select a metadata key value for the line's Length. The metadata value is expressed in postscript points, e.g., 72. The metadata key value imposition:collatingmarkslength must be selected.
- Pages: Use to enter the location where the spines are in the PDF file. It is on these pages that the Collating Marks will be placed. Use this to select a numeric value. For example, if a new volume begins every 25 pages, that is the value that should be entered here. The metadata key value imposition: collating markspages must to be selected.

Configuring the Line Settings Using Manual Input

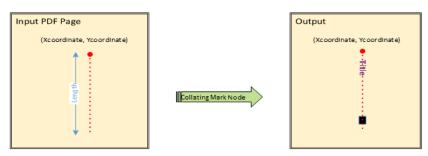
When the Use Metadata checkbox is not selected, the following Line Setting's UI displays:

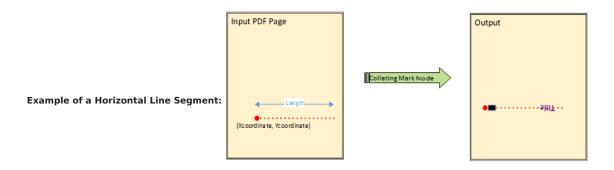


• Line Direction: Select a radio button to specify the direction of the line segment. Options are Horizontal and Vertical.

The images below note how the metadata values are applied for the Line Direction values:

Example of a Vertical Line Segment:



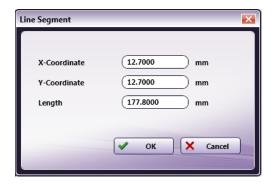


Note: The Red Lines in the example above are for emphasis only and will not appear in the output.

• Line Segment: Add a new Line Segment by clicking the [+] button. When saved, the new value appears in the table. Once a value appears in the table, click on it to select it. Use the **Edit** icon to modify the setting or **Delete** the icon to remove the setting from the table.

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• Add or Edit a Line Segment: When Add or Edit a Line Segment is selected, the following window opens:



Specify the following values:

• X Coordinate: Enter a value.

• Y Coordinate: Enter a value.

• Length: Enter a value.

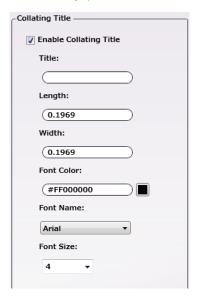
Click **OK** to save and apply the values or **Cancel** to cancel the requested changes.:

Note: The maximum of 4 line segments is supported

• Repeat Pages: Use these fields to specify the location where the spines are in the PDF file. For example, if a new volume begins every 25 pages, the **From** value should be 1 and the **Repeat** value should be 25. The Collating Marks will be added on every 25th page of the PDF file.

Setting the Collating Title Values

Use this setting option to enter the Title and Volume Number values used in the Collating field.



Note: The Collating Title Font, Length, Width, Font Color, and Font Size are used for the both the Collating Title and the Volume Number.

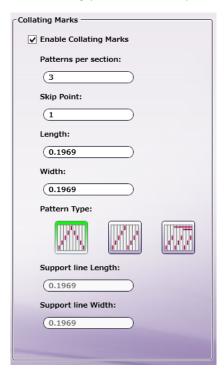
- Enable Collating Title: Select the checkbox to activate the setting's panel.
- Title: Enter the text value here.
- Length: Enter the Length value here.
- Width: Enter the Width value here.
- Font Color: Click to open a color selection option, and then select a color value.
- Font Name: Select a value from the drop-down. All system installed fonts are listed.
- Font Size: Select a font size value here.

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Setting the Collating Marks Values

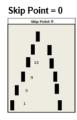
Use this setting option to enter the Collating Marks values used in the Collating field.

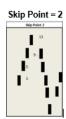
Note: A 5-mm gap is inserted at the top and the bottom of the Collating Marks area.



- Enable Collating Marks: Select the checkbox to activate the Collating Mark setting.
- Patterns per section: Specify the number of marks to be added in one vertical line.
- Skip Point: If pages are to be skipped, specify the Skip Point here. This setting will be applied regardless of the pattern selected.

Example of Skip Point Implementation





- Length: Specify the Length of the Collating Mark.
- Width: Specify the Width of the Collating Mark.
- Pattern Type: Select the Pattern Type of the Collating Marks. Supported Pattern Types are: V-Pattern, Double Line Pattern, and Triple Line Pattern.
 - Support line Length: This option is only available when the **Triple Line Pattern** is selected as the **Pattern Type**. Use this option to specify the **Line Length**.
 - Support line Width: This option is only available when the Triple Line Pattern is selected as the Pattern Type. Use option to specify the

Note: As noted earlier, 60% of the spine space is set aside for the **Collating Marks**. When the **Triple Line Pattern** is selected, the 60% is further sub-divided: 33% of the area is set for the horizontal line and 67% is set for the **Collating Marks**. For all other pattern options, all 60% of the designated space is used by the **Collating Marks**.

Limitations

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The following limitations exist:

1. If the Collating Title text contains anything other than English characters, then it (and the Volume Number) will be drawn as vertical text.

For example:

If the text contains only English characters, the output will be as follows.

Hello

If the text contains Non-

English characters, the output will be as follows.

J

W

10

ち

は

If the text contains both English & other Non-English characters, the output will be as follows

-

W

10

ち

は

K

M

Color Bar



Color Bar

Note: This node works with TIFF, JPG, PNG, BMP, and PDF files.

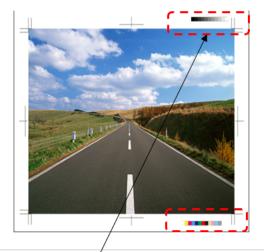
The **Color Bar node** is used to insert an image into a file.

- This node can be used to test the quality of a device's ink color by verifying the real-time output of the inserted image.
- The node can also be used to insert an image like a Company Logo.

This process takes supported file format input and processes the input file based on the defined settings. During workflow execution, this node will insert/merge the thumbnail image(s) with the original input document. The files are merged and the output is sent to the next node in the workflow, the color processes intact.

Sample Input Document (Before insertion of Thumbnail Images):

Sample Output Document (After insertion of Thumbnail images):



Here 2 thumbnail images were added. Typically, images are added in the Margin Area. This area is trimmed in post-process.

Note: The thumbnail image content overlaps the original document content in the output document.

Note: When one thumbnail image is placed over another thumbnail image, image overlap may occur.

Note: When the thumbnail image is bigger than the original document size OR if the thumbnail does not fit inside the original document, the image portion outside of the original document is cut and does not appear in the output document.

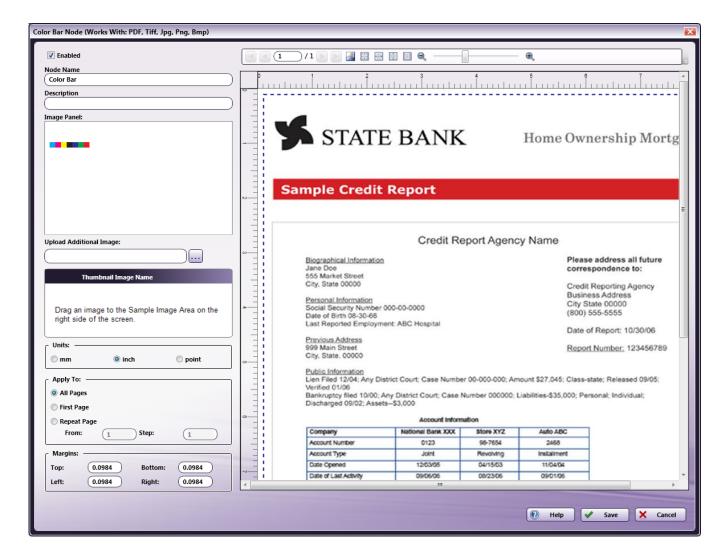
Note: When the Additional Thumbnail image is a TIFF or PDF with more than one page, only the first page will be inserted into the input document.

Note: When the thumbnail image is Color and the original document is B/W (Gray Scale/Monochrome), the output file defaults to B/W.

Using the Color Bar Node

Add the Color Bar Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Color Bar Node's window:

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Use this window to specify the Color Bar Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Color Bar Node.
- In the **Description** field, enter a description for the Color Bar Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Insert Image

Image Panel

The Image Panel displays the default images and any additional uploaded images. Use the ellipses (...) button to browse and upload additional images. A maximum of 256 images is supported.

Note: All images are common for all users and workflows.

Any of the following image file formats may be uploaded to the node:

• TIFF, IPG, PNG, BMP, and PDF

Drag-and-drop an image from the **Image Panel** to the **Sample Preview Panel**. Once the image displays in the **Sample Preview Panel**, Move, Resize, and Rotate operations may be applied to the image. Images moved to the **Sample Preview Panel** are inserted into the input document.

An image may also be inserted into the Sample Preview Panel using the Insert option, the action accessible via the right-click context menu.

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An image may be deleted from the **Image Panel** by right-clicking on it and then selecting **Delete** from the context menu. The **Delete** is only applied by clicking the Color Bar Node's **Save** button. If the node's **Cancel** button is clicked after a **Delete** operation, the **Delete** is NOT applied and the deleted setting remains in the **Image Panel**. When an image is deleted, the image is removed from its original location, the path selected when the image was uploaded to the Color Bar Node.

Note: Default images cannot be deleted. When a default image is selected, the Delete option is disabled.

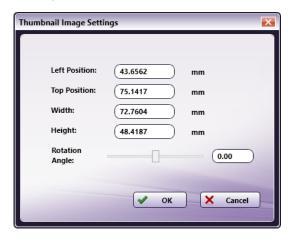


Thumbnail Image Name



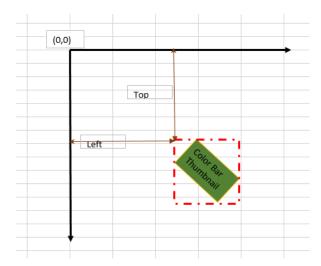
The **Thumbnail Image Name** panel lists the names of all the images displayed in the **Sample Preview Panel**. Select an item in the Thumbnail Images list, the corresponding thumbnail image will be selected in **Sample Preview Panel** and vice-versa.

Edit the **Thumbnail Image** using the **Edit** icon to the left of the file or by double-clicking on the image in the **Sample Preview Panel**. The Edit screen opens:



• In the Thumbnail Image Settings window, specify the **Left** and **Top** Positions, and the **Width**, and **Height** of the image. The **Left** and **Top** positions of the bounding rectangle are as noted in the image that follows:

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- Use the slider to automatically change the **Rotation Angle** or enter a precise value in the text field. Supported values are **-360 360**. If a numeric value outside the range is entered, the value defaults back to 0 degrees.
- An image may be deleted from the **Thumbnail Image Name** panel by using the **Edit** icon to the left of the file. A verification pop-up opens. Click **OK** to Delete the **Thumbnail Image Name** or **Cancel** to cancel the request.

Note: When a value is left blank, the option resets to the previous value once the screen is closed.

Note: If the *Thumbnail Image Name* is changed, this will only affect the Name displayed by the node. It does not change the file name in the *ThumbnailImages* folder.

Units

In the Units panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point

Note: By default, *inch* displays for all English locale systems. All other locales default to *mm*. Regardless of the default value, any of the available three values may be selected. Whenever the unit value is changed, it is applied throughout the application.

Apply to Setting



Choose one of the following options to specify where the image should be inserted:

- All Pages: The image is inserted in all pages of the Input document.
- First Page: The image is only inserted on the first page of the Input document.
- Repeat Page: The image is inserted based on the From and Step values.
 - From: For example, if the From value is 4 and the Step value is 6, then images are inserted at Pages 4, 10, 16, 22, etc.
 - Step: This is only enabled when the Repeat Page option is selected.

Margins



Use the **Margins** settings to preview the alignment of input files. There are four values that may be specified: **Top**, **Bottom**, **Left**, and **Right**. These margins are only for visual reference and do not affect the printed document. Based on the values set, the **Margins** (dotted lines) are updated in the **Sample Preview Panel**.

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Sample Preview Panel

The **Sample Preview Panel** provides a preview of the output file. Supported file types are TIFF, JPG, PNG, BMP, and PDF. The maximum dimension supported is 330.2 x 1200.0 mm. Only one image may be loaded at a time.

To load an image, drag-and-drop a single image from the **Image Panel** to the **Sample Preview Panel**. A maximum of 4 images may be dropped into the **Sample Preview Panel**.

Images may also be inserted to the **Sample Preview Panel** using the **Insert** option from the right-click context menu. When Insert is used, the image is inserted into the **Sample Preview Panel** and placed at the **Left=0**, **Top=0** coordinates. The images added to the **Sample Preview Panel** also appear in the **Thumbnail Image List**.

If a portion of an image is outside of the **Sample Preview Panel**, it is not shown. If the entire image is outside of the **Sample Preview Panel**, then the whole image is not shown and the image cannot be selected.

Once the image is added to the **Sample Preview Panel**, the following operations may be applied: **Copy**, **Move**, **Rotate**, **Resize**, **View**, **Edit**, and **Delete**.



Copy/Paste



Use the right-click context menu to apply Copy and Paste operations to a thumbnail image inside the Sample Preview Panel. When
 Copy is clicked, the settings of the current image are copied. When the Paste is clicked, the copied image is pasted in the selected position.

Move

- Select the image then use the ALT + ARROW keys, or select the image and then use the mouse to move the image inside the Sample Preview Panel.
- In the **Thumbnail Image Name** window, double-click on a thumbnail image and the settings screen opens. Enter values in the **Top** and **Left** fields. The image in the **Sample Preview Panel** is moved to the location specified by the two values.

Rotation

- Use the right-click context menu to rotate the thumbnail image by 90, 180, or 270 degrees.
- Use the mouse to rotate an image.
- In the Thumbnail Image Name window, double-click on a thumbnail image and the settings screen opens. Use the slider or enter numeric
 values. Enter values in the Top and Left fields. The image in the Sample Preview Panel is moved to the location specified by the two
 values.

Resize

- Click on an image and drag the corners or edges to resize the image.
- Select the image then use the **ALT + SHIFT + ARROW** keys to resize the image.
- In the Thumbnail Image Name window, double-click on a thumbnail image and the settings screen opens. Enter values in the Width and Height fields.

View/Edit

• Double click on the thumbnail image or click the Edit icon in the Thumbnail Images List to View/Edit properties.

Delete

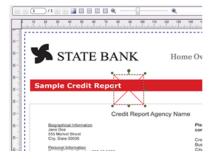
Click on one or more images to select them, and then use the **Delete** key or the context menu's **Delete** option. To select multiple items, click on a thumbnail image then press the **CTRL** key.

If a **Preview** image has not been added, a default image displays in the **Sample Preview Panel**.

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If any error occurs when uploading a preview image, a default image displays in the Sample Preview Panel.

When an added thumbnail image is deleted, an **X** cross-mark displays to show the previous location of the deleted image, as noted in the example that follows:



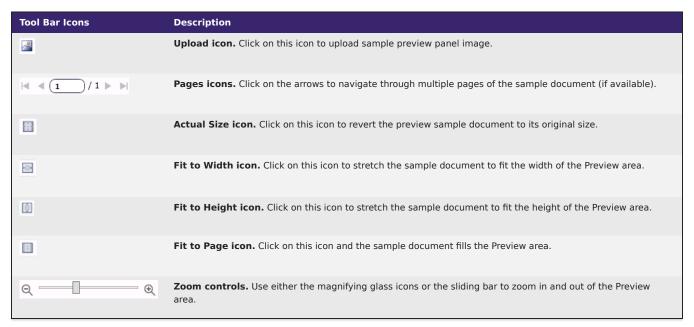
If the node setting's Save button is clicked and the node cannot locate an added Thumbnail Image, the following notification pop-up opens:



Click OK to close the pop-up.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.



Limitations

Important!

- ${\bf 1.} \ {\bf Only} \ the \ following \ format \ combinations \ support \ transparency:$
 - The Input file and the Image Panel are both PDFs. (The **Sample Preview Panel** will not match the output in this case. In areas where transparency is applied in the output file, white area(s) are instead displayed in the **Sample Preview Panel**.)

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- The image Panel is TIFF or PNG and the input file is TIFF, JPG, PNG, BMP format. (In case input file is PDF, transparent information is lost)
- 2. When the workflow contains a PDF-type thumbnail image with a transparent background, the **Sample Preview Panel** displays a white background but in the output PDF, the image is inserted against a transparent background.
- 3. Combining a PDF Input file with a TIFF transparency in the Image Panel will generate a processing error.

Color Route Vector PDF



Note: This node works with PDF files (version 1.3 or later).

Use the Color Route Vector PDF Node to route documents based on color. By default, Color Detection is only run on vector objects. If the **Process** both Raster and Vector objects radio button is selected, however, both vector and raster objects are considered when color detection is run.

If unsupported color space is found when color detection is run, the value specified in the **Undetected color space in Vector object will be treated as:** drop-down is applied. There are also settings that can program the way the node responds to undetected color space when it is detected when color detection is run.

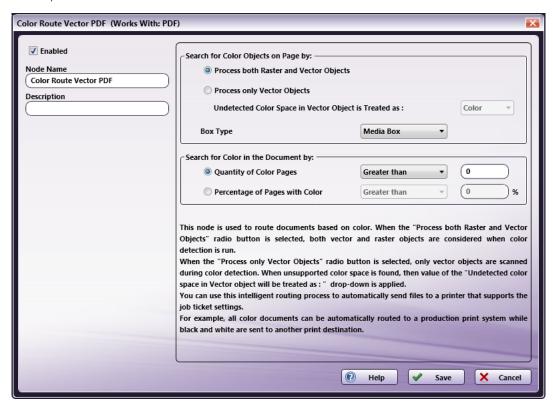
Once color is detected, use the node to automatically forward the file to a node that will send the job to a printer that supports the detected settings. For example, all color documents can be automatically routed to a production print system while black and white jobs can be sent to another print destination.

This node can have the following outbound connectors:

- Yes: If the color page condition has been met.
- No: If the color page condition has not been met.
- Error: If the document type is not supported.

Using the Color Route Vector PDF Node

Add the Color Route Vector PDF Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Color Route Vector PDF Node's window:

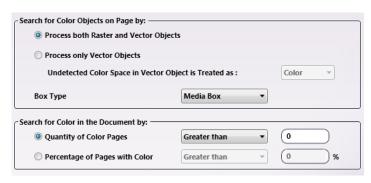


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Use this window to specify the Color Route Vector PDF Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Color Route Vector PDF Node.
- In the **Description** field, enter a description for the Color Route Vector PDF Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

Color Route Vector PDF Settings



 Process both Raster and Vector objects: When this radio button is selected, both Vector and Raster objects in the input file are processed during color detection.

When this radio button is selected, **Vector** objects are scanned first. If a **Color Vector** object is found, then the page is identified as **Color**. If no color **Vector** objects are found, then the page is rasterized and each pixel is scanned for color detection.

- Process only Vector objects: When the Process only Vector Objects radio button is enabled, only Vector objects identified in the input file
 are processed during color detection. If unsupported color space is found, the drop-down value specified in the Undetected color space in
 Vector object will be treated as: field is applied.
- **Undetected color space in Vector object will be treated as:** Select a value from the drop-down. When undetected space is identified, the selected value is applied as the color value of the space.
- **Box Type:** From the drop-down, select the type of box that needs to be detected. There are three options: **Media Box**, **Trim Box**, **Bleed Box**. The default value is **Media Box**. The **Media Box** conditions of the input PDF file are matched according to the setting.

Note: When a page doesn't contain a Trim/Bleed Box, then the value defaults to Media Box.

- Select either the **Quantity of Color pages** or **Percentage of Pages with Color** radio button. Once a radio button is chosen, select a supporting value from the corresponding drop-downs.
 - Quantity of Color Pages: Select a delimiter from the drop-down. The options are Equals, Less than, and Greater than.

Once the delimiter is chosen, enter a numeric value in the text field. For example, if the node should route files that have less than 10 color pages to a specific printer, select **Less than** and enter **10** in the text field.

Percentage of Pages with Color: Select a delimiter from the drop-down. The options are Equals, Less than, and Greater than.

Once the delimiter is chosen, enter a corresponding percentage in the text field. For example, if the node should route files that are made up of more than 30% color pages, select **Greater than** and enter **30** in the text field.

Excel Parser



Note: This node works with XLSX, and CSV files.

The **Excel Parser Node** is used as a decision node that takes an input file and processes it based on the defined settings of the node. Once processed, the file is routed to the appropriate output destination as configured in the workflow.

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Specifically, this node checks the UI Settings **Cell Number**, **Cell Value** and **Condition** against the input document. If a match is found, then the node moves the document to the **Yes** route. If not, the input file is moved to the **No** route.

This node supports only file types of XLSX, and CSV. All other file formats are routed to the outbound ERROR connector.

Using the Excel Parser Node

Add the Excel Parser Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Excel Parser Node's window:



Use this window to specify the Excel Parser Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Excel Parser Node.
- In the **Description** field, enter a description for the Excel Parser Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Set the Excel Parser Node Properties

Set the Excel Parser Node properties in the configuration window. By default, only one input condition is displayed.



• **Cell Number**: Specify the **Cell Number** or column in this field. The entered values input can be the in the same format used in Excel documents (e.g., A1 refers to the first row and the first column of an entry). 100 rows and 100 columns are allowed so the **Cell Number** can contain a maximum value of A1 to CV100.

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- Cell Value: Specify the Cell Value for the respective Cell Number in this field.
- Case-Sensitive: If the checkbox is selected, the character's case is considered when matching input data Cell Values.
- Condition: AND or OR may be specified as a delimiter. When only 1 input condition is entered, this setting is ignored. When more than 1 input condition is entered, the setting is ignored for the last row of the input file's data.
- + icon: Use this icon to add a new condition. Up to 40 conditions may be added. More than one condition with the same Cell Number may be added but the OR delimiter must be selected in such cases.
- X icon: To delete a condition from the table, select it then click this icon.

Limitations

- 1. The Excel Parser Node does not support password protected XLSX files.
- 2. The Excel Parser Node only accepts CR+LF or LF as newline code. If CR is used as newline code, this code must be converted to one of the supported values using conversion software.

Ganging



Note: *This node works with ZIP files that contain PDFs and CSV files.

The **Ganging Node** is used to combine multiple jobs that will be printed on larger sheets of paper. After printing, Ganged jobs are processed using a PostPress Machine (Cutter, Folder, Booklet Maker, etc.) to separate the individual jobs.

When a job is submitted to the Ganging Node, it must be a ZIP file that includes one or more print jobs (PDF files) and a CSV file that specifies the Ganging instructions.

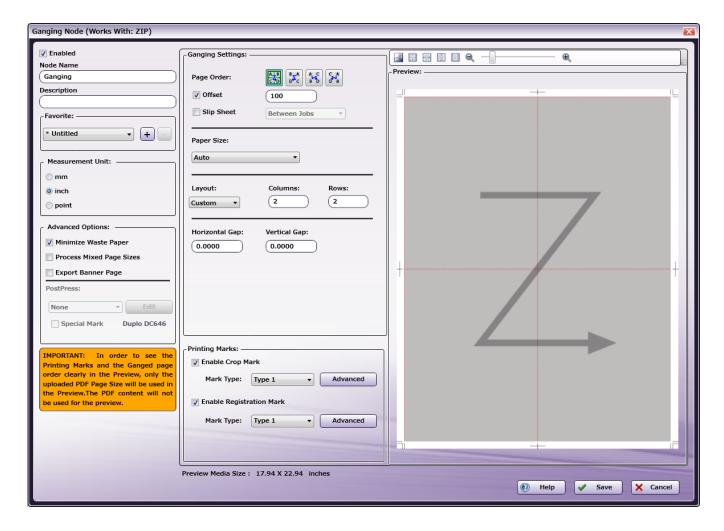
Note: For instructions about how to create the required ZIP file, please see the section **Basic Operation Procedure for the Ganging Job Submitter**.

The maximum number of jobs that the Ganging Node can accept is 1000.

Using the Ganging Node

Add the Ganging Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Ganging Node's window:

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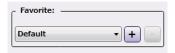


Use this window to specify the Ganging Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Ganging node.
- In the **Description** field, enter a description for the Ganging node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Favorite

In the Favorite area, create a template and save it. Saved templates may also be deleted.



To save selected settings as a **Favorite**, add a **Favorite Name** after all settings are chosen.

- Add a New Item: Click the [+] button and the Favorite pop-up opens. Enter a Favorite Name value. Click the Save button.
- Delete an Existing Item: Click the [-] button. A confirmation dialog opens. Click Yes to delete the Favorite Name:

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• Edit an Existing Item: Click the [+] button. Modify the setting's changes, as required. By default, the Favorite value will default to Untitled. To keep the original name, re-enter the old value by replacing Untitled. When finished, click the Save button. If the old name was re-entered, an overwrite verification pop-up opens. In it, click Yes to overwrite the old values.

Note: A maximum of 100 **Favorites** may be saved. When the **Favorite** count reached 100, new addition to **Favorite** is not allowed and following error message will be displayed to user.



Note: If a **Favorite** value other than **Default** is selected when the node opens, the **Favorite** drop-down displays a value of saved Favorite name if the saved Favorite is not deleted/modified by other Ganging node in a workflow.

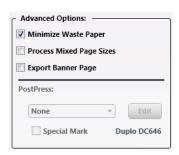
Note: If a **Favorite** value other than **Default** is selected and it is already deleted/modified when the node opens, the **Favorite** drop-down displays a value of [-].

Note: If a Favorite value is modified while the node is open, the Favorite drop-down displays a value of [*Untitled+].

Note: Favorite name can be a combination of any of the below characters.

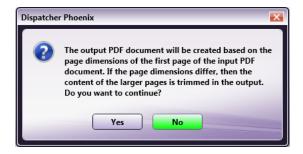
- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]
- Spaces
- Numbers(0 to 9)

Advanced Options



- Minimize Waste Paper: When the Minimize Waste Paper checkbox is selected, Ganging will minimize wasted paper as much as possible based on the ganging setting and size of the input jobs. If not selected, the output job will be printed without considering the issue of Waste Paper.
- Process Mixed Page Sizes: Select this checkbox if the job has multiple Page Sizes. When the value is selected, the following pop-up message opens:

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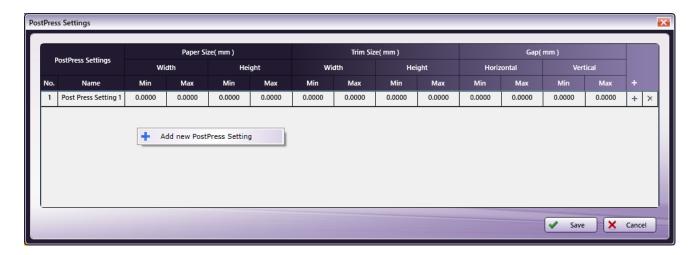
Click Yes to confirm or No to cancel the request.

• Export Banner Page: If this checkbox is selected, both a Marked document and a Banner Page are created. The Banner Page shows the types of marks being applied to the job (Trim, for example). The Banner Page is generated and sent along with the main job but as an independent job.

Note: In the generated Banner Page, the value "banner" is set as the value for the metadata key "ganging:jobtype".

- **PostPress**: After printing, Ganged jobs are processed using a PostPress machine (Cutter, Folder, Booklet Maker, etc.) to separate the individual jobs. Use this option to specify the type of PostPress finisher to be used for the processing. The default value of the drop-down is **None**.
- Edit: Click this button and the PostPress Settings window opens.

Note: The PostPress option is only available when a Paper Size other than Auto is selected.



• Add New PostPress Setting: Add a New PostPress Setting by clicking the [+] button or by using the context menu option Add New PostPress Setting, accessed by right-clicking in the PostPress Setting's window. Once saved, new settings are added to the table.

Note: PostPress Setting's Name*** *can be a combination of any of the below characters.

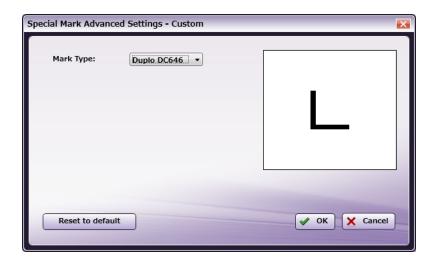
- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]
- Spaces
- Numbers(0 to 9)
- **Delete PostPress Setting:** To delete a saved setting, locate its row and then click the **X** at the far-right of the row. As an alternative method, right-click on the **No**. column of an item then select **Delete** from the menu. When either delete is initiated, a confirmation dialog opens:

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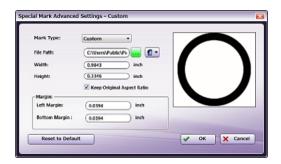
Click Yes to delete the setting or No to cancel the request.

- Select the Save button to keep the PostPress definition. Click the Cancel button to exit the window without saving the changes.
- **Special Mark**: When this checkbox is selected, the hyperlink to the right of the checkbox is activated. To change the special mark, click on the hyperlink to open the Special Mark Advanced Settings Custom dialog. Use that screen to select a new **Special Mark**.



 $\textbf{Note:} \ \ \textbf{The Special Mark} \ \ \textbf{option is only available when a Paper Size} \ \ \textbf{other than Auto} \ \ \textbf{is selected}.$

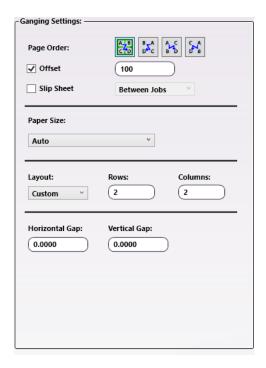
• Special Mark Advanced Settings - Custom: When Custom is selected as the Mark Type, the following UI opens. On it, specify the absolute dimension of the mark's Width and Height as well as the absolute position of the mark in relationship to the Left Margin and Bottom Margin.



Ganging Settings

Use the Ganging Settings panel to specify the page Layout:

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- Page Order Icons: Specify the output order of pages. There are four icon options (left to right): Horizontal, Horizontal Reversed, Vertical, or Vertical Reversed.
- Offset: When the checkbox is selected, Offset is enabled. The minimum value is 1, the maximum is 10,000, and the default is 100.
- Slip Sheet: Select the checkbox and select a drop-down value to insert a blank sheet Between Jobs or Between Sets when printing.
- Paper Size Drop-Down: The size of output paper used for printing (the Ganging sheet size). The default value of Paper Size is Auto. When a
 Paper Size other than Auto is selected, the following options are available:
 - Portrait/Landscape: Select the Orientation of the output paper.
 - Width: The Width of the output paper (or the Ganging sheet).
 - Height: The Height of the output paper (or Ganging sheet).

Note: For B paper sizes(e.g. B0, B1) supported in Imposition node, based on the Dispatcher Language, the **Paper Size** dimensions will be displayed either in JIS(Japanese Industrial Standard) or ISO (International Standard Organization) dimensions.

Note: For Dispatcher Language other than Japanese, B paper size dimension will be displayed in ISO dimensions. Otherwise it will be displayed in IIS dimensions.

 $\textbf{Note:} \ \ \text{For workflow execution the dimensions displayed in UI will be used}.$

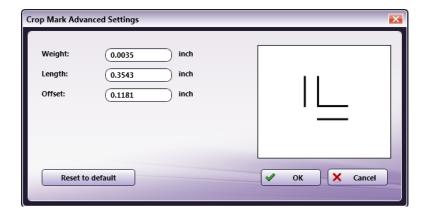
- Layout: Select Custom or Auto. When Custom is selected, the number of Ganging blocks will be produced based on the Column and Row values specified here. When Auto is selected, the Rows and Columns fields are disabled and are updated based on the Preview Image. If a Preview is not uploaded, the Preview Media Size noted at the bottom of the screen will display a value of " ".
- Horizontal Gap Setting: The horizontal interval between two Ganging blocks. The default value is 0.
- Vertical Gap Setting: The vertical interval between two Ganging blocks. The default value is 0.

Printing Marks

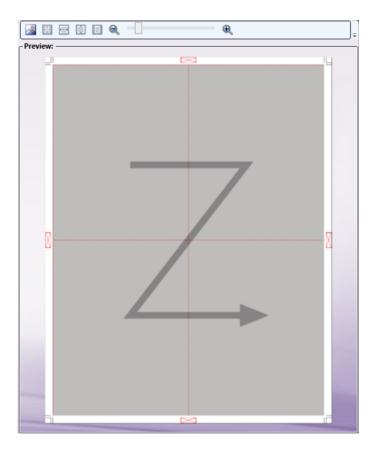


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- Enable Crop Mark: Select the checkbox to add Crop Marks.
 - Mark Type: Select the type of Crop Mark from three options: Type1, Type2 and Type3.
 - Advanced: Click the Advanced option to open a dialog where Custom Crop Mark values may be specified. When the Reset to Default button is clicked, all values are reset to their defaults.

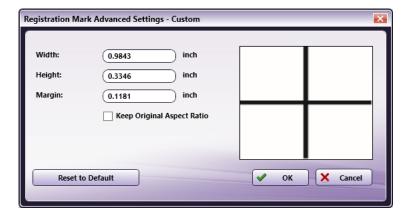


- Enable Registration Mark: Select the checkbox to add Registration Marks.
 - Mark Type: Select the type of registration mark from four options: Type 1, Type 2, Type 3, and Custom. If Custom is selected, the path
 to the image must be specified. Credentials need to be set up to support file access via the network. If the Custom Registration Mark File
 path is blank. Then an X-mark image will be shown in the Preview and the Registration Mark Advanced Setting Custom window.



• Mark Type Custom Settings: when Custom is selected, the setting screen opens:

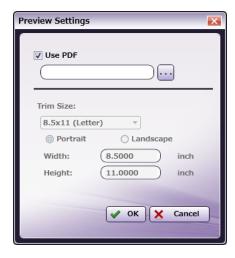
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- Custom Registration Mark Width, Height, and Margin settings are available to specify.
- If the Keep Original Aspect Ratio checkbox is selected, any change in one of the values will be automatically applied to the other values so that the Registration Mark maintains its original appearance. When the Reset to Default button is clicked, all values are reset to their defaults.

Preview Settings

Click the **Preview** icon <a>I to open the Preview Settings window:



- **Use PDF:** Select the checkbox to use the PDF file to generate the **Preview**. When the option is checked, more than 5,000 pages and up to a 500 MB file can be supported by **Import**.
- **Trim Size:** The Page Size after all excess material is trimmed off.
- Portrait/Landscape: Click a radio button to select the document's Orientation.
- Width and Height: These values reflect the trim Width and the trim Height. When a Custom Size is selected in the Trim Size Combo Box, then the Width and Height text boxes are enabled and values may be modified.

While the Preview Settings are being generated, a progress screen displays:



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If additional changes are made while the Preview is loading, they will be applied and the Preview that is loaded will be based on the last configured settings.

Notes:

- The Preview panel only supports PDF files.
- Only a file from the local drive is supported. Files from a network path are not supported.
- To see the Printing marks clearly in the **Preview** panel, only the uploaded PDF Page size is used to display the **Preview**. PDF content is displayed as a gray box in the **Preview** panel.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

Tool Bar Icons	Description
	Upload Preview icon. Click on this icon to upload a sample preview image. Only PDF preview is supported. 5,000 pages and up to a 500 MB file can be supported by Preview if the OS has at least 16 GB of RAM.
24	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
00	Fit to Height icon. Click on this icon to stretch the sample document to fit the height of the Preview area.
	Fit to Page icon. Click on this icon and the sample document fills the Preview area.
Q — Q	Zoom controls. Use either the magnifying glass icon or the sliding bar to zoom in and out of the Preview area.

Handling metadata

This node outputs the following metadata group categories.

Ganging, Job, Post Press.

Limitations

Important!

- 1. The Ganging Node does not work well with mixed page sizes. The recommended paper tolerance for optimum performance is ± 5 points.
- 2. The Ganging Node can support 1,000 jobs, if the system Dispatcher it is run on has a minimum of 16 GB RAM.
- 3. When **Auto Ganging** is used, the PDF image is repeated multiple times in the output document. If the **Bleed Boxes** of the file overlap, all the page's **Bleed Boxes** are reduced in size so that all the images fit on a single page. To avoid cutting errors in these cases, it is recommended that a **Horizontal** and **Vertical Gaps** be added using the **Ganging Settings** screen. This will provide enough of a gap to support proper cutting.
- 4. Network Credentials
 - Credentials are passed/written as is to Workflow/config XML.
 - When a workflow is EXPORTED and IMPORTED from a different machine, the Network credential may not work as expected. Credentials may need to be set/provided manually after importing the workflow.
- 5. There might be a performance issue/degrade when opening the workflow when the image is loaded from a Network path.
- 6. Only publicly shared network paths are supported for the **Use PDF** options in the **Preview panel**. Network paths that require credentials are not supported.

Imposition

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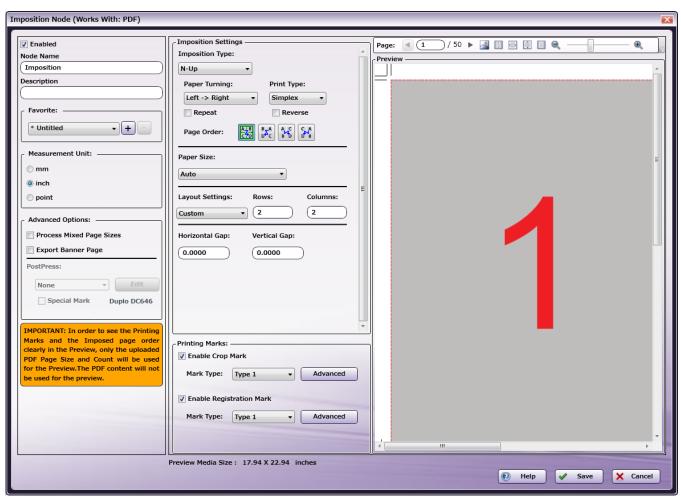
Note: This node works with PDF files (version 1.3 or later).

Smaller format jobs like business cards, booklets, and greeting cards may be sent to a printer that supports large format printing. By placing multiple copies of these smaller jobs onto a single page, production may be more efficient.

The Imposition Node takes the PDF files and then adds imposition settings to support large format digital printing.

Using the Imposition Node

Add the Imposition Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Imposition Node's window:



Use this window to specify the Imposition Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Imposition Node.
- In the **Description** field, enter a description for the Imposition Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Measurement Unit** panel, select a measurement unit radio button. Three types of measurement units are available: **mm**, **inch**, and **point**.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.

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· Click the Help button to access online help.

Favorite

In the Favorite area, create a template and save it. Saved templates may also be deleted.



To save selected settings as a Favorite, add a Favorite Name after all settings are chosen.

- Add a New Item: Click the [+] button and the Favorite pop-up opens. Enter a Favorite Name value. Click the Save button.
- Delete an Existing item: Click the [-] button. A confirmation dialog opens. Click Yes to delete the Favorite Name.



• Edit an Existing item: Click the [+] button. Modify the setting's changes, as required. By default, the Favorite value will default to Untitled. To keep the original name, re-enter the old value by replacing Untitled. When finished, click the Save button. If the old name was re-entered, an overwrite verification pop-up opens. In it, click Yes to overwrite the old values.

Note: A maximum of 100 **Favorites** may be saved. When the **Favorite** count reached 100, new addition to **Favorite** is not allowed and following error message will be displayed to user.



Note: If a **Favorite** value other than **Default** is selected when the node opens, the **Favorite** drop-down displays a value of saved Favorite name if the saved Favorite is not deleted/modified by other Imposition node in a workflow.

Note: If a **Favorite** value other than **Default** is selected and it is already deleted/modified when the node opens, the **Favorite** drop-down displays a value of [-].

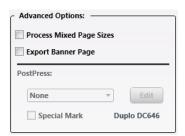
Note: If a Favorite value is modified while the node is open, the Favorite drop-down displays a value of [*Untitled+].

Note: Favorite name can be a combination of any of the below characters.

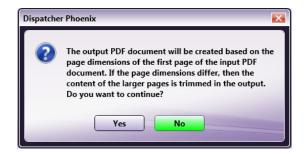
- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]
- Spaces
- Numbers(0 to 9)

Advanced Options

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• Process Mixed Page Sizes: Select this checkbox if the job has multiple Page Sizes. When the value is selected, the following pop-up message opens:



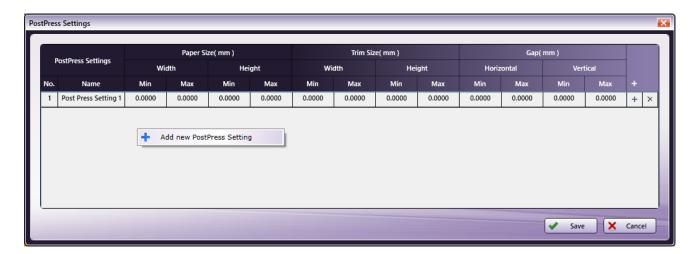
Click Yes to confirm or No to cancel the request.

• Export Banner Page: If this checkbox is selected, both a Marked document and a Banner Page are created. The Banner Page shows the types of marks being applied to the job (Trim, for example). The Banner Page is generated and sent along with the main job but as an independent job.

Note: In the generated Banner Page, the value "banner" is set as the value for the metadata key "imposition:jobtype".

- **PostPress:** After printing, Imposition jobs are processed using a PostPress machine (Cutter, Folder, Booklet Maker, etc.) to separate the individual jobs. Use this option to specify the type of PostPress finisher to be used for the processing. The default value of the drop-down is **None**.
- Edit: Click this button and the PostPress Settings window opens.

Note: The PostPress option is only available when a Paper Size other than Auto is selected.



Add New PostPress Setting: Add a New PostPress Setting by clicking the [+] button or by using the context menu option Add New
PostPress Setting, accessed by right-clicking in the PostPress Setting's window. Once saved, new settings are added to the table.

 $\textbf{Note:} \ \ \text{PostPress Setting's Name} \\ **** * \text{can be a combination of any of the below characters}.$

- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]
- Spaces

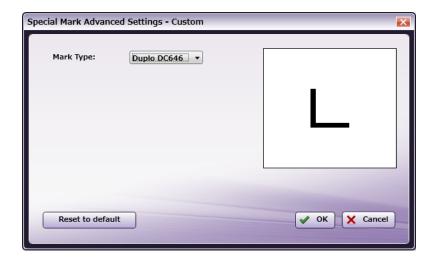
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- Numbers(0 to 9)
- **Delete PostPress Setting**: To delete a saved setting, locate its row and then click the **X** at the far-right of the row. As an alternative method, right-click on the **No.** column of an item then select **Delete** from the menu. When either delete is initiated, a confirmation dialog opens:



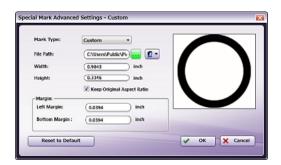
Click **Yes** to delete the setting or **No** to cancel the request.

- Select the Save button to keep the PostPress definition. Click the Cancel button to exit the window without saving the changes.
- **Special Mark**: When this checkbox is selected, the hyperlink to the right of the checkbox is activated. To change the special mark, click on the hyperlink to open the Special Mark Advanced Settings Custom dialog. Use that screen to select a new **Special Mark**.



Note: The Special Mark option is only available when a Paper Size other than Auto is selected.

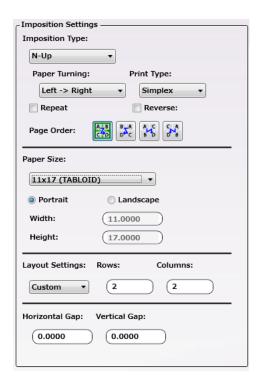
Special Mark Advanced Settings - Custom: When Custom is selected as the Mark Type, the following UI opens. On it, specify the absolute
dimension of the mark's Width and Height as well as the absolute position of the mark in relationship to the Left Margin and Bottom Margin.



Imposition Settings

Use the Imposition Settings panel to specify the page Layout:

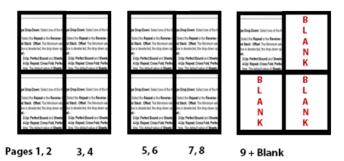
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Imposition Type Drop-Down: Select one of the following options:

- N-Up: Select the Repeat or the Reverse checkbox.
- Cut and Stack: Offset. The Minimum value is 1.The Maximum value is 10,000. By default, the Offset checkbox it is enabled and has a value of 100. When the Offset checkbox is deselected, the drop-down option it is not enabled.
- · Booklet:
 - 2-Up: Perfect Bound and Sheets per Section. The default value of Sheets per Section is 16.
 - 4-Up: Repeat, Cross Fold, Perfect Bound, and Sheets per Section. In Booklet 4-Up, the Repeat and the Cross Fold checkboxes are not available at the same time. The default value of Sheets per Section is 8.
 - 8-Up: Perfect Bound and Sheets per Section. The default value of Sheets per Section is 4.
 - 16-Up: Perfect Bound and Sheets per Section. The default value of Sheets per Section is 2.

When a **Booklet** value is selected, the printed pages can contain blank sections. For example, if a document with 9 pages has an **Imposition > Booklet** setting of 2-UP, two pages will print on the front and two pages on the back of the first two sheets. The final sheet, however, will only have output printed in the top half of one side of the sheet. The bottom half and the back of the sheet will remain empty:



This same type of processing is applied regardless of the N-Up settings so that in many cases, the final printed page will have blank sections. When PostPress cutting is applied, these blank sections are usually discarded.

• Perfect Bound: When selected, Sheets per Section also displays. The default value of Sheets per Section varies depending on the Imposition type (2-Up, 4-Up, 8-Up, or 16-Up). The minimum value of Sheets per Section is 1. The maximum value is 1,000.

Note: The Repeat checkbox of Booklet 4-Up is different from the Repeat checkbox of N-Up.

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Note: Perfect Bound and Sheets per Section of Booklet 4-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section of Booklet 2-Up are different from Perfect Bound and Sheets per Section from

- Paper Turning Drop-Down: Select a value from the drop-down to indicate the turn direction used when reading the document. There are three
 of options: Left->Right (Default), Right->Left (Japanese style), Top->Bottom (Calendar style).
- Print Type Drop-Down: Simplex or Duplex. When the Imposition type is N-Up or Cut and Stack, the value defaults to Simplex. When the Imposition Type is Booklet, the value defaults to Duplex.
- Page Order Icons: This option is applied when the Imposition Type is N-Up or Cut and Stack. Specify the output order of pages. There are four options: Horizontal, Horizontal Reversed, Vertical, or Vertical Reversed.

Paper Size Settings:

- Paper Size Drop-Down: The size of output paper used for printing (the Imposition sheet size). The default value of Paper Size is Auto. When a Paper Size other than Auto is selected, the following options are available:
 - Portrait/Landscape: Select the Orientation of the output paper.
 - Width: The Width of the output paper (or the Imposition sheet).
 - **Height:** The **Height** of the output paper (or Imposition sheet).

Note: For B paper sizes(e.g. B0, B1) supported in Imposition node, based on the Dispatcher Language, the **Paper Size** dimensions will be displayed either in JIS(Japanese Industrial Standard) or ISO (International Standard Organization) dimensions.

Note: For Dispatcher Language other than Japanese, B paper size dimension will be displayed in ISO dimensions. Otherwise it will be displayed in ISO dimensions.

Note: For workflow execution the dimensions displayed in UI will be used.

Layout Settings: Select **Custom** or **Auto**. When **Custom** is selected, the number of Imposition blocks will be produced based on the **Column** and **Row** values specified here. When **Auto** is selected, the **Rows** and **Columns** fields are disabled and are updated based on the Preview Image. If a Preview is not uploaded, the **Preview Media Size** noted at the bottom of the screen will display a value of " - ".

Horizontal Gap Setting: The horizontal interval between two Imposition blocks. The default value is 0.

Vertical Gap Setting: The vertical interval between two Imposition blocks. The default value is 0.

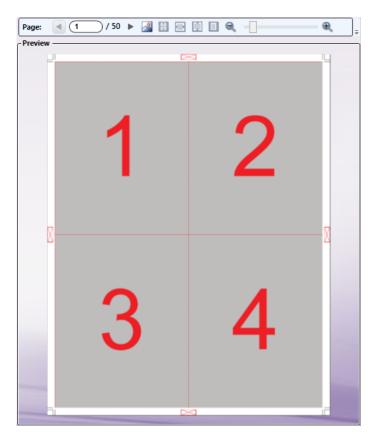
Spread Setting: This option is available when **Booklet** is selected as the **Imposition Type**. **Spread** is the space between two pages, printed on the same sheet to form a booklet. The minimum value of **Spread** is 0 mm. The maximum value of **Spread** is 10 mm.

Printing Marks

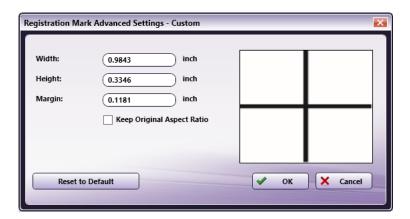


- Enable Crop Mark: Select the checkbox to add Crop Marks.
 - Mark Type: Select the type of Crop Mark from three options: Type 1, Type 2, and Type 3.
 - Advanced: Click the Advanced option to open a dialog where Custom Crop Mark values may be specified. When the Reset to Default
 button is clicked, all values are reset to their defaults.
 - ![Imposition Node](../kmi.imposition_media/f44afe08ea7938d061b080ee1e5aa40f.png)
- Enable Registration Mark: Select the checkbox to add Registration Marks.
 - Mark Type: Select the type of registration mark from four options: Type 1, Type 2, Type 3, and Custom. If Custom is selected, the path to the image must be specified. Credentials need to be set up to support file access via the network. If the Custom Registration Mark File path is blank. Then an X-mark image will be shown in the Preview and the Registration Mark Advanced Setting Custom window.

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 $\circ~$ Mark Type Custom Settings: When Custom is selected, the setting screen opens:

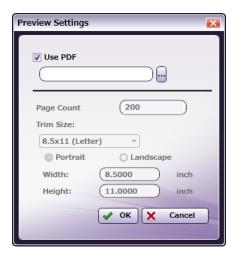


- Custom Registration Mark Width, Height, and Margin settings are available to specify.
- If the Keep Original Aspect Ratio checkbox is selected, any change in one of the values will be automatically applied to the other values so that the Registration Mark maintains its original appearance. When the Reset to Default button is clicked, all values are reset to their defaults.

Preview Settings

Click the **Preview** icon to open the Preview Settings window:

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- **Use PDF:** Select the checkbox to use the PDF file to generate the Preview. When the option is checked, more than 5,000 pages and up to a 500 MB file can be supported by **Import**.
- Page Count: This is the total number of pages the Preview will support. This option is available only when the Use PDF checkbox is unselected. Enter a value. The default value is 200 but up to 5,000 pages can be supported.
- Trim Size: The Page Size after all excess material is trimmed off.
- Portrait/Landscape: Click a radio button to select the document's Orientation.
- Width and Height: These values reflect the trim Width and the trim Height. When a Custom Size is selected in the Trim Size Combo Box, then the Width and Height text boxes are enabled and values may be modified.

While the Preview Settings are being generated, a progress screen displays:



If additional changes are made while the Preview is loading, they will be applied and the Preview that is loaded will be based on the last configured settings.

Notes:

- The **Preview** panel only supports PDF files.
- Only a file from the local drive is supported. Files from a network path are not supported.
- To see the Printing marks clearly in the **Preview** panel, only the uploaded PDF Page size is used to display the **Preview**. PDF content is displayed as a gray box in the **Preview** panel.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

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Tool Bar Icons	Description
	Upload Preview icon. Click on this icon to upload a sample preview image. Only PDF preview is supported. 5,000 pages and up to 500 MB file can be supported by Preview if the OS has at least 16 GB RAM.
鬱	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Fit to Height icon. Click on this icon to stretch the sample document to fit the height of the Preview area.
	Fit to Page icon. Click on this icon to fit the sample document completely in the Preview area.
€	Zoom controls. Use either the magnifying glass icon or the sliding bar to zoom in and out of the Preview area.
0 /0	Page Navigation. (when available) Click on the arrows to navigate through multiple pages of the sample document.

Handling metadata

This node outputs the following metadata group categories.

Imposition, Job, Post Press.

Limitations

Important!

- 1. The Imposition Node does not work well with mixed page sizes. The recommended paper tolerance for optimum performance is ± 5 points.
- 2. The Imposition Node can support 5,000 PDF pages and 500 MB in the Preview panel if the OS has a minimum of 16 GB RAM.
- 3. The Imposition Node can support up to 20,000 PDF pages during workflow execution if the OS has a minimum of 16 GB RAM.
- 4. Network Credentials
 - Credentials are passed/written as is to Workflow/config XML.
 - When a workflow is EXPORTED and IMPORTED from a different machine, the Network credential may not work as expected. Credentials may
 need to be set/provided manually after importing the workflow.
 - There might be a performance issue/degrade when opening the workflow when the image is loaded from a Network path.
- 5. Only public shared network paths are supported for the **Use PDF** options in the **Preview** panel. Network paths that require credentials are not supported.

Job Ticket Editor



Note: This node works with PDF files (version 1.3 or later).

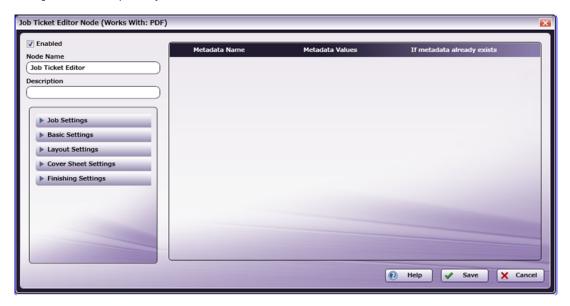
Use the **Job Ticket Editor Node** to modify job ticket information. Information set with this node is added to the metadata, and then carried forward to the next node in the workflow.

As an example, the Job Ticket Editor Node may be configured to change the **Copy** count of all jobs sent to the node to 25. When a job is sent to a Job Ticket Editor Node that includes this setting, the node modifies the job ticket's metadata for **Copy**, overwriting it with the new value of 25. For this example, all the other job ticket metadata values remain unchanged. The job is then sent forward in the workflow with only the **Copy** value modified.

Using the Job Ticket Editor Node

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Add the Job Ticket Editor Node to the workflow by dragging the Job Ticket Editor Node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Editor Node's window:



Click an option in the left-side panel and its setting options appear below the option.

The right-side panel contains a grid composed of four columns.

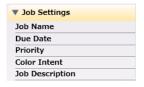
When setting options are displayed in the left panel, select an item, and then drag-and-drop it on the grid. A new row is added for each item moved. Once an item is in place, values may be edited for all four columns.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Job Ticket Editor Node.
- In the **Description** field, enter a description for the Job Ticket Editor Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Grid Setting Options

- Metadata Name: This column displays the Metadata Name of the item that is added when a value is dragged-and-dropped from the left column.
- Metadata Values: This column displays the Metadata value of the item that is added when a value is dragged-and-dropped from the left column. These values are determined by the element type. The value may be modified by selecting a new value from the list or manually editing the value in the field.
- If metadata already exists: This drop-down will display two or three options depending on the element type. Select an option to specify the action required to update the Job Ticket Editor settings.
 - Replace: Overwrite the value if the target metadata key exists. Otherwise, create a new metadata key value pair.
 - Ignore: Do nothing if the target metadata key exists. Otherwise, create a new metadata key value pair.
 - **Append**: Append the existing value if the target metadata key exists. Otherwise, create a new metadata key value pair.
- $\mbox{\bf Delete}:$ Click the $\mbox{\bf Delete}$ icon and the selected row is deleted from the grid.

Job Settings Options (Left-Side Panel)



• Job Name: The job ticket description.

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- Due Date: The Due Date of the job.
- Priority: The Priority of the job. The options are Normal or Rush.
- Color Intent: The color mode of the job. The options are B&W, Color, Color (High Chroma), Mixed, or Mixed (High Chroma).
- Job Description: A text entry field in which a relevant description of the job can be entered, when required.

Basic Settings Settings Options (Left-Side Panel)



- Copies: The Copy count of the job.
- Collate: The Collate setting of the job. The options are On or Off.
- Offset: The Offset printing setting of the job. The options are On or Off. When On is selected, two additional options appear. Either Offset
 Output Copies or Offset Output Pages must be selected.
- Paper Name: The name of the paper that should be loaded into the destination printer's tray to support the job.

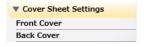
Note: Each printer that supports the **Paper Name** field may have rules or limitations regarding the characters that may be entered in this field. Please refer to a printer's user's guide for specific details about such **Paper Name** requirements.

Layout Settings Options (Left-Side Panel)



- 2-in-1:Use the setting to print two pages of a PDF file onto a single sheet of output paper. The options are Off, 2-in-1, 2 Repeat, 2 Repeat Reversal (L), 2 Repeat Reversal (D), or 2 Repeat Reversal (D).
- Printing Type: The Printing Type to be applied to the job. The options are Booklet, Double-Sided, One-Sided, or Adhesive Binding.

Cover Sheet Settings Options (Left-Side Panel)



- Front Cover: Add a Front Cover to the document. The options are Off, Blank, or Printed. When Blank or Printed is chosen, the Paper Name text field appears and a Paper Name may be entered.
- Back Cover: Add a back cover to the document. The options are Off, Blank, or Printed. When Blank or Printed is chosen, the Paper Name
 text field appears and a Paper Name may be entered.

Note: Each printer that supports the **Paper Name** field may have rules or limitations regarding the characters that may be entered in this field. The value entered in the **Paper Name Front Cover** and **Back Cover** fields must follow these rules and limitations. Please refer to a printer's user's guide for specific details about such **Paper Name** requirements.

Finishing Settings Options (Left-Side Panel)



- Binding: The Binding position of the document. The options are Auto, Left, Top, or Right.
- Saddle Stitch: Use to activate Saddle-Stitch for the document. The options are Off or On.

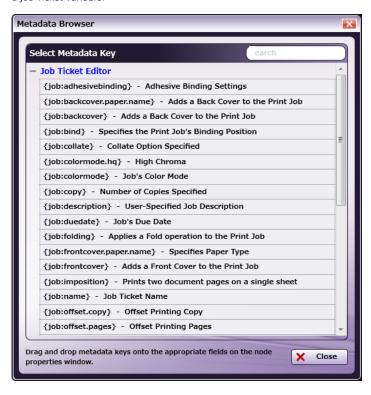
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- Trim: Use to activate post-print cutting to Saddle-Stitch and Center-Fold documents. The options are Off or On
- Staple: Use to staple the document. The options are Off, 1 Staple, 2 Staples, 2 Staples Narrow, or 2 Staples Narrow
- Punch: Use to apply punch holes to the document. The options are Off, 2 Holes, 3 Holes, 4 Holes, or Stream Punch.
- Fold: Use to apply a Fold operation to the document. The options are Off, Z-Fold (A3, B4, 11x17, 8K), Z-Fold (8 1/2x14), Half-Fold In, Half-Fold Out, Letter Fold In, Letter Fold Out, Zigzag Fold In, Zigzag Fold Out, Double Parallel Fold In, Double Parallel Fold Out, Gate Fold In, Gate Fold Out, Multi-Letter Fold Out, or Multi-Half Fold.
- Ring Binding: Use to activate Ring Binding for the document. The options are On or Off. When On is selected, two additional options appear. Choose either Inside or Outside for both Front Cover Print Side and Back Cover Print Side.

Job Ticket Metadata

Once the JDF Ticket Editor Node is added to a workflow, one entry named Job Ticket is shown in the Metadata Browser.

The syntax for the Job Ticket is {job:name of job ticket attribute}. Use the Metadata Browser window (as show in the screen capture below) to choose a Job Ticket variable:



Note: This Help file contains detailed information about supported Job Ticket Metadata and the JDF XPaths and Value Ranges. Refer to **Job Ticket Metadata Information** When launched, the Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User info), and the metadata values from the active node.

Job Ticket Parser: CSV



Note: This node works with CSV and Zip (PDF + CSV) files. The CSV file must be in UTF-8 format.

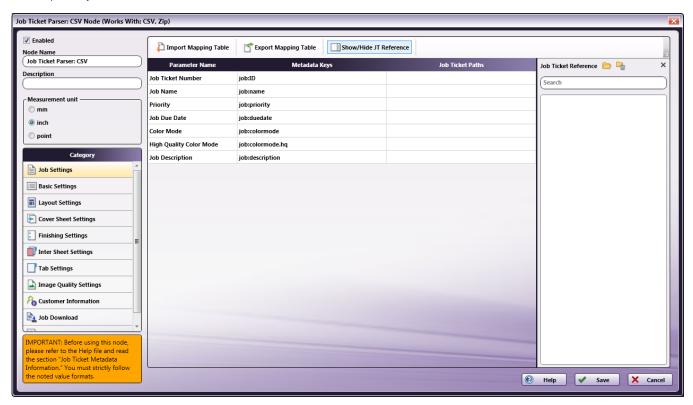
The **Job Ticket Parser: CSV Node** is used to parse the information in a CSV file, and then write the parsed information as metadata. The CSV file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

The PDF file location is noted in the CSV file's URL field and the PDF file is downloaded to the node using that information. If the input file is a ZIP file (CSV + PDF) then the file is unzipped, and then the CSV file is processed.

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Using the Job Ticket Parser: CSV Node

Add the Job Ticket Parser: CSV Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Parser: CSV Node:



Use this window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Job Ticket Parser: CSV Node.
- In the **Description** field, enter a description for the Job Ticket Parser: CSV Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Measurement Unit** panel, select a measurement unit radio button. Three types of measurement units are available: **mm**, **inch**, and **point**

Note: By default, inch displays for all English locale systems. All other locales default to mm. Regardless of the locale, any option may be selected.

- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:

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- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, Paper Unit, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- Finishing Settings: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- **Job Download**: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the **Others** Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:

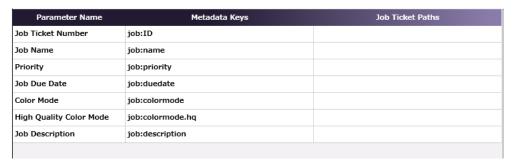


- · Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

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Mapping Table Panel

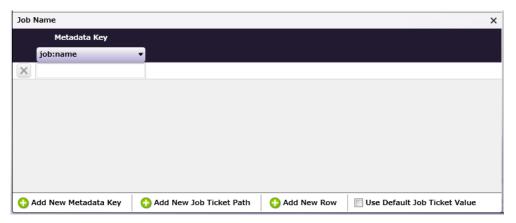
Use this panel to define the mapping values between the job ticket parameters and the **Dispatcher Metadata**. Click each category option to open the **Parameter Name/Metadata Key** values in the main panel.



- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the CSV Path that corresponds to each job ticket parameter.

Value Map Panel

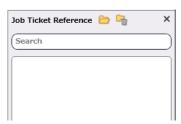
Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.



- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel



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To open a sample job ticket file, click the **Open** button —. Once a job ticket is selected, all possible CSV Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button $\stackrel{\frown}{=}$ to clean up the list.

Basic Operations of the Mapping Table

Job Ticket parameters often need to be converted into a different format, either for storage or so that a certain task may be performed on the job ticket. Conversion (or parsing) of a job ticket into metadata makes it possible for the job ticket to be read for such tasks. This node supports conversion to the CSV format.

Job Ticket File

Before starting to work with this node, a CSV job ticket file must be generated.

Note: Once the Job Ticket Parser: CSV Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

\Program Files\Common Files\Konica Minolta\Phoenix\Resources\JobTicketParserCSVNode

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

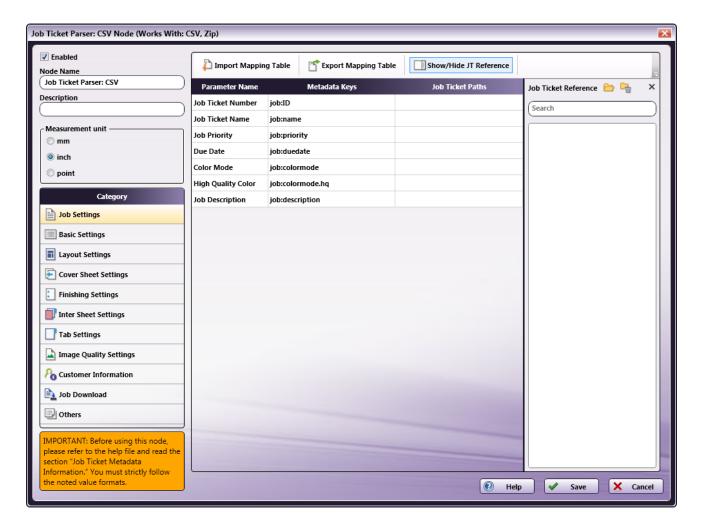
The Job Ticket Parser: CSV Node defines job ticket parameters using Document-and Per Page Settings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

JobName, Quantity, MediaColor, Duplex, File, Src, PPS PageRange, PPS PaperName SampleCSVJob, 1, yellow, On, file, C:\Temp\Testfile.pdf, 1, A4 ,,,,,"6-9,11", A5

Configure the Mapping Table Using the Job Ticket File

- 1. Using a text editor, copy the sample CSV file above.
- 2. The Source Path("Src") noted in the sample job ticket (explained in the example above), needs to be changed so that the path is valid.
- 3. Save the sample locally as csv_sample_jobticket_file.csv.
- 4. Double-click on the Job Ticket Parser: CSV node. The settings screen opens:

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- 5. In the left panel, set the following values:
 - Enabled checkbox: Select the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
 - Measurement unit: Select a radio button.

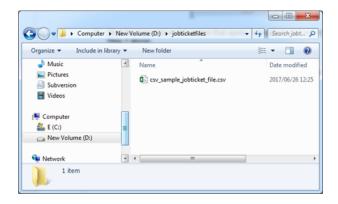
Note: If the metadata value {job:paper.unit} is included in the input Job Ticket, that value will overwrite any value selected in the **Measurement Unit** field.

6. In the **Job Ticket Reference** panel(far-right), locate the **Open** icon:



7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above*(csv_sample_jobticket_file.csv)*:

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8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel, as noted in the following image:



Note: When a job ticket is loaded, it needs to be mapped by dragging-and-dropping the correct values from the **Job Ticket reference** panel. If a value DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

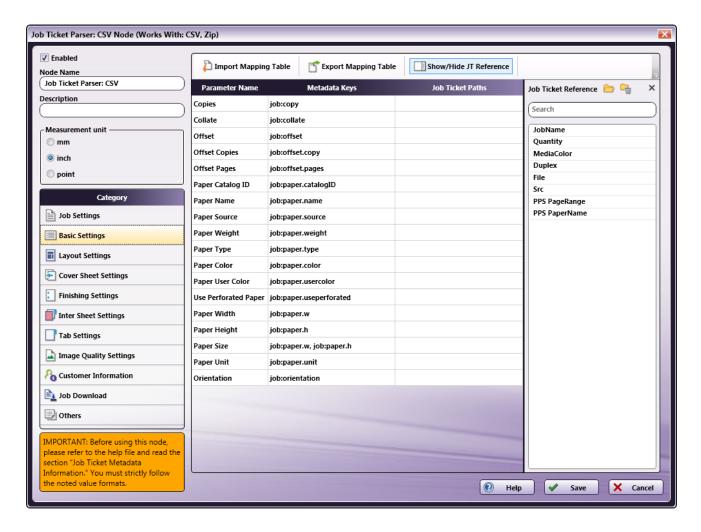
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

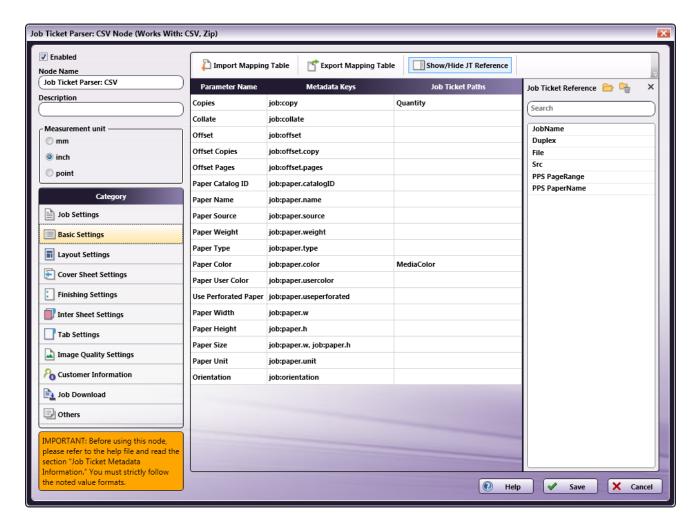
1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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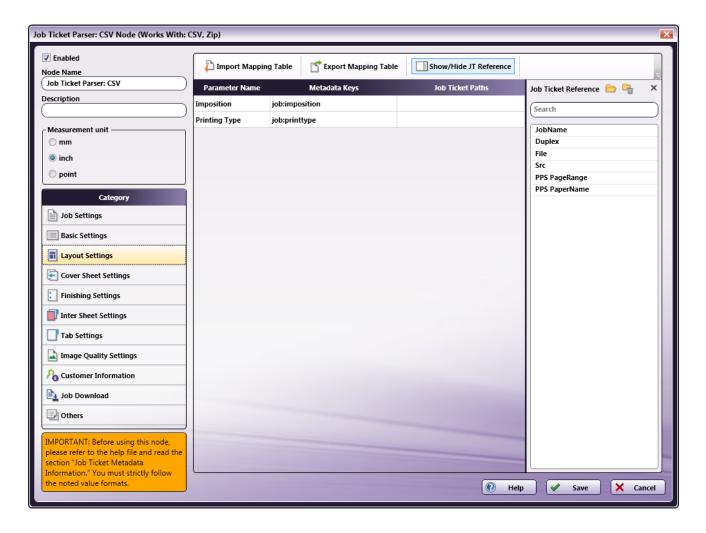
- 2. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- Drag-and-drop Quantity to the Job Ticket Paths cell of the Copies row. Drag-and-drop MediaColor to the Job Ticket Paths cell of the Paper Color row.
- $4. \ \ The \ values \ that \ were \ dragged-and-dropped \ are \ removed \ from \ the \ \textbf{\textit{Job Ticket Reference}} \ panel:$

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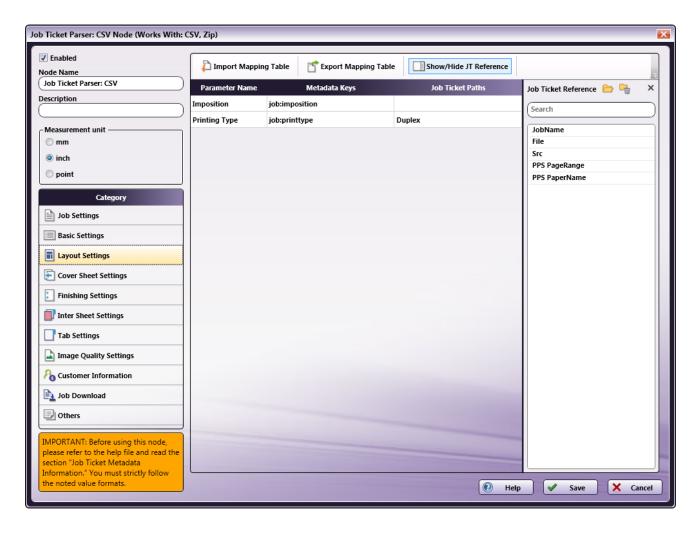
5. In the Category panel, click the Layout Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 6. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 7. Drag-and-drop **Duplex** to the **Job Ticket Paths** cell of the **Printing Type** row.

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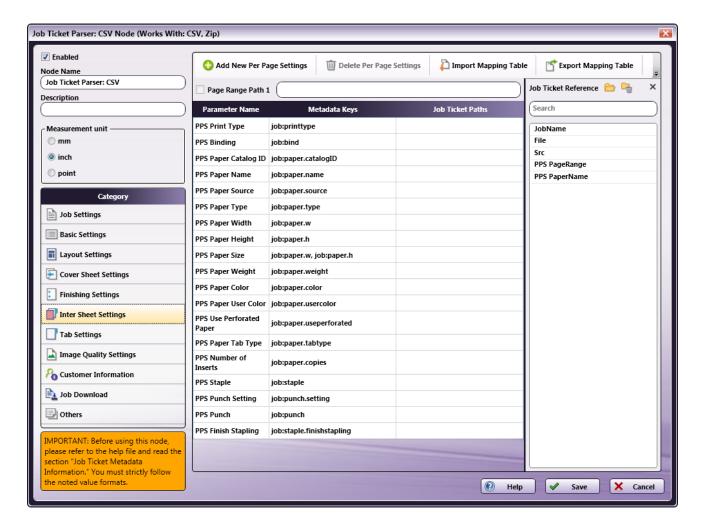
- 8. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 9. Repeat the same procedure for other **Category** options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The **Inter Sheet Settings Category** is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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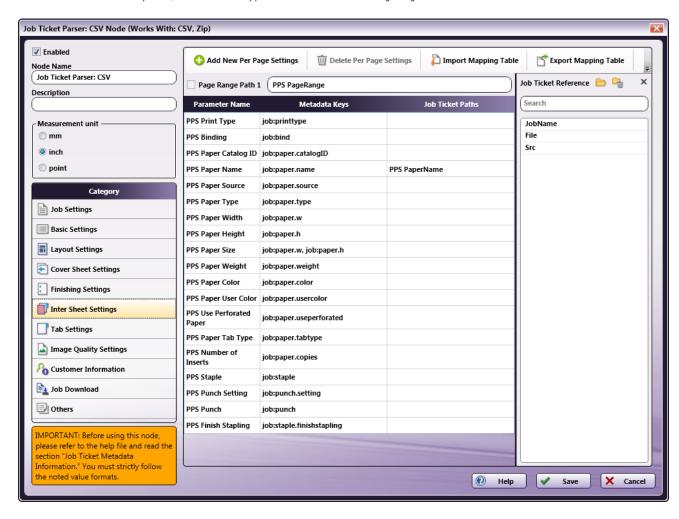
2. From the Job Ticket Reference panel, drag-and-drop PPS PageRange to the Page Range Path 1 text box.

Note: Page Range Path value should start with "PPS" pattern.

3. From the Job Ticket Reference panel, drag-and-drop PPS PaperName to the Job Ticket Paths cell of the PPS Paper Name row.

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4. Once these actions are completed, the screen will appear as shown in the following image:



- 5. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 6. Repeat the same procedure for other **Category** options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Four values are supported: **Retrieve from Local Path**, **Download from URL**, **Retrieve Encoded base64 from Job Ticket** (the PDF data in the form of embedded base64 format), and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample CSV job ticket files:

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- File,Src
- file,C:\Temp\Testfile.pdf

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- File,Src
- http,http://10.146.171.98/testapp8/sample.pdf

Note: The file type keyword "http" and the file type keyword written in the input job tick-et file must match.

Retrieve Encoded base64 from Job Ticket

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- File,Src
- base64,xxddgdfexdgfgngn...

Note: The file type keyword "base64" and the file type keyword written in the input job ticket file must match.

Retrieve from Network share

- File.Src
- share,\\11.12.13.14\Temp\Testfile.pdf

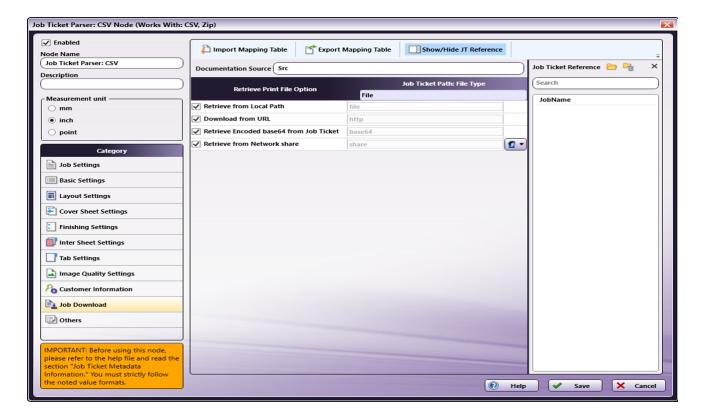
Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- 2. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 3. From the Job Ticket Reference panel, drag-and-drop File to the Job Ticket Path: File Type field.
- 4. From the Job Ticket Reference panel, drag-and-drop Src to the Documentation Source field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

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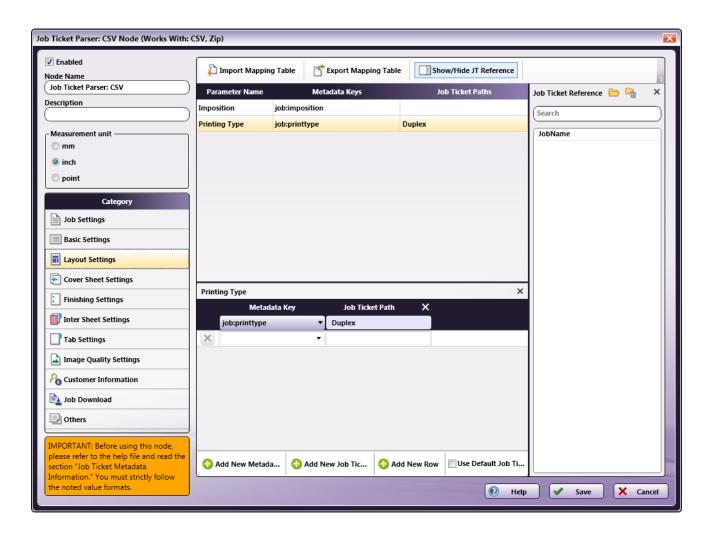
- 6. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 7. Repeat the same procedure for other **Category** options, as required.

Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **Duplex**.

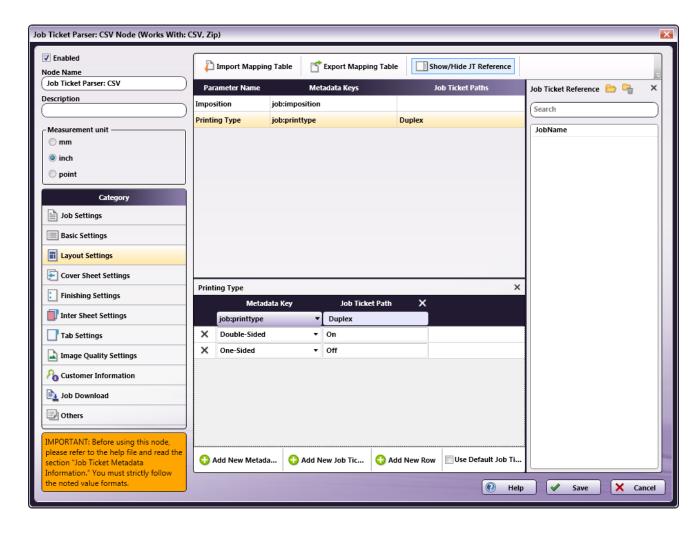
- 1. In the ${\bf Category}$ panel, click the ${\bf Layout~Settings}$ option.
- 2. Click on **Printing Type** row to open the **Value Map** panel:

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3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map row:

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- 4. In the first row, select Double-Sided from the Metadata Key drop-down menu and enter On for the Job Ticket Path.
- 5. If a job is sent to a node that has a **Duplex On** value and **Double-Sided** printing is selected, then **Double-Sided** printing is output in the metadata.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter Off for the Job Ticket Path.
- 7. If a job is sent to a node that has a **Duplex Off** value and **One-Sided** printing is selected, then **One-Sided** printing is output in the metadata.
- 8. When finished, click **Save**. To undo the changes, click **Cancel**.

Sample of a Job Ticket Parser: CSV Node Workflow



csv_sample_jobticket_file.csv) is moved to the Input Folder. This is sent to the Job Ticket Parser: CSV Node where the job ticket CSV is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: CSV Node's settings. When this is completed, the data is transferred to the Metadata to File Node where it is converted to an XML document. From there, the XML document is transferred to an Output Folder.

Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: CSV Node.

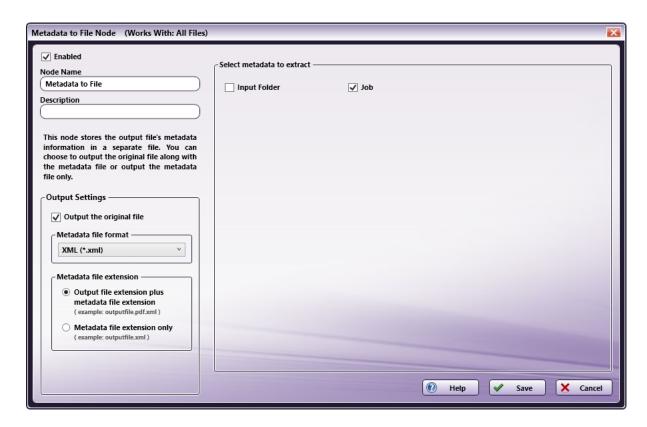
Job Ticket Parser: CSV Node: The purpose and instructions for setting up this node are noted in the discussion that precedes this section.

Metadata to File Node: This node extracts the configured metadata, saves it as an XML file, and then sends the file to the next node in the workflow. Follow these steps to configure the Metadata to File Node:

1. Open the Metadata to File Node by double-clicking the node's icon.

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- 2. Make sure the **Enabled** checkbox is selected.
- 3. In the Output Settings panel, select the Output the original file checkbox, and then select XML (*.xml) from the Metadata file format drop-down.
- 4. In the Metadata file extension panel, select the Output File extension plus metadata file extension radio button.
- 5. In the **Select metadata to extract** panel, select the **Job** checkbox.
- 6. Click **Save** to apply the changes.



Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<meta group="job" name="copy">
    <document>1</document>
</meta>
<meta group="job" name="file.URL">
    <document>C:\Temp\Testfile.pdf</document>
</meta>
<meta group="job" name="file.type">
    <document>file</document>
</meta>
<meta group="job" name="paper.color">
    <document>yellow</document>
<meta group="job" name="paper.name">
    <page number="1">A4</page>
    <page number="6">A5</page>
    <page number="7">A5</page>
    <page number="8">A5</page>
    <page number="9">A5</page>
    <page number="11">A5</page> </meta>
<meta group="job" name="printtype">
    <document>Double-Sided</document>
</meta>
```

Limitations

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Note: The ZIP file that can be input to this node should contain PDF and CSV files only. When folder containing PDF and CSV files is zipped and given as input, this type of ZIP file is not supported.

Job Ticket Parser: JDF



Note: This node works with JDF, MJM, and Zip (JDF + PDF) files.

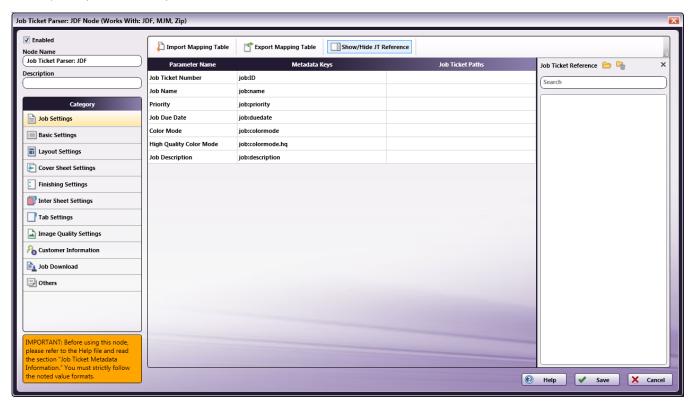
The **Job Ticket Parser: JDF Node** is used to parse the information in a JDF file, and then write the parsed information as metadata. The JDF file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

The input will be a JDF, ZIP (JDF + PDF), or MIME (MJM) file. The JDF and ZIP (JDF + PDF) contain the job ticket information in the form of job ticket fields and job ticket values. The MJM file contain the JMF, the JDF content (job ticket), and the PDF content. The extracted JDF (job ticket) and the PDF file are processed by the node.

Note: The job ticket information in the MJM file will contain JMF, JDF, and PDF content in the form of base 64. This node WILL NOT process the JMF content in the MJM file.

Using the Job Ticket Parser: JDF Node

Add the Job Ticket Parser: JDF Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Parser: JDF Node:



Use the window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Job Ticket Parser: JDF Node.
- In the **Description** field, enter a description for the Job Ticket Parser: JDF Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.

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· Click the **Help** button to access online help.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- Finishing Settings: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- **Job Download**: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the Others Category options are selected. The example below displays when the **Others** Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:



- Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.

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- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings
 category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table XML file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's XML file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

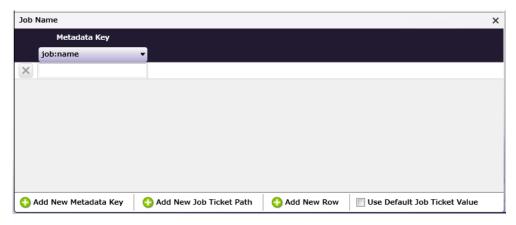
Use this panel to define the mapping values between the job ticket parameters and the **Dispatcher Metadata**. Click each category option to open the **Parameter Name/Metadata Key** values in the main panel.

Parameter Name	Metadata Keys	Job Ticket Paths
Job Ticket Number	job:ID	
Job Name	job:name	
Priority	job:priority	
Job Due Date	job:duedate	
Color Mode	job:colormode	
High Quality Color Mode	job:colormode.hq	
Job Description	job:description	

- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the JDF Path that corresponds to each job ticket parameter.

Value Map Panel

Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.

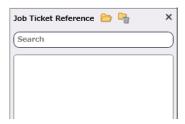


- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel

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To open a sample job ticket file, click the **Open** button (
). Once a job ticket is selected, all possible JDF Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of the Mapping Table

Job Ticket parameters often need to be converted into a different format, either for storage or so that a certain task may be performed on the job ticket. Conversion (or parsing) of a job ticket into metadata makes it possible for the job ticket to be read for such tasks. This node supports conversion to the JDF format.

Job Ticket File

Before starting to work with this node, a JDF job ticket file must be generated.

Note: Once the Job Ticket Parser: JDF Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

\Program Files\Common Files\Konica Minolta\Phoenix\Resources\JobTicketParserJDFNode

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

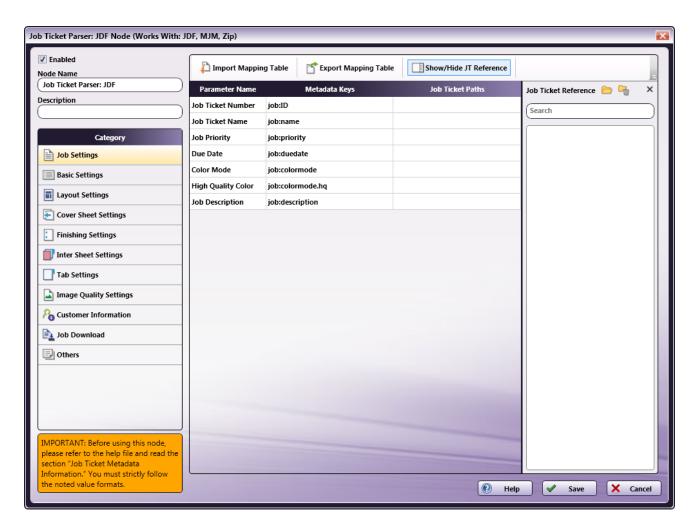
The Job Ticket Parser: JDF Node defines job ticket parameters using Document- and Per Page Settings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

```
<?xml version="1.0" encoding="UTF-8"?>
<JDF xmlns="http://www.CIP4.org/JDFSchema_1_1"</pre>
  xmlns:kmbs="http://www.konicaminolta.com/KMBS_JDFExtension_1_1"
 xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="Combined">
<ResourcePool>
    <Media Class="Consumable"
      ID="r170711 024318593 005119" MediaColorName="Yellow" Status="Available">
      <Location LocationName="AutoSelect"/>
    </Media>
    <LayoutPreparationParams Class="Parameter"</pre>
       ID="r170711 023611281 005743"
       Sides="TwoSidedFlipY" Status="Available">
       <LayoutPreparationParams RunIndex="0~4"</pre>
         kmbs:BindingEdge="Auto" kmbs:PerPageSet="Yes">
         <Media Class="Consumable" DescriptiveName="test">
            <Location LocationName="Auto"/>
         </Media>
       </LayoutPreparationParams>
    </LayoutPreparationParams>
    <RunList Class="Parameter" ID="r170707_053618136_000949" NPage="4"Status="Available">
    <LayoutElement>
         <FileSpec File="file" URL="c:\Temp\Testfile.pdf"/>
    </LayoutElement>
    <Component Class="Quantity" ComponentType="FinalProduct"
    ID="r170711_024318596_005125" Status="Unavailable"/>
</ResourcePool>
<ResourceLinkPool>
    <MediaLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_024318593_005119"/>
    <LayoutPreparationParamsLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_023611281_005743"/>
    <RunListLink CombinedProcessIndex="0 1" ProcessUsage="Document"</pre>
      Usage="Input" rRef="r170707_053618136_000949"/>
    <ComponentLink Amount="10" CombinedProcessIndex="4" Usage="Output"rRef="r170711_024318596_005125"/>
</ResourceLinkPool>
```

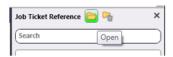
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Configure the Mapping Table Using the Job Ticket File

- 1. Using a text editor, copy the sample JDF file above.
- 2. The URL Path noted in the Layout Element, needs to be changed so that the path is valid.
- 3. Save the sample file locally as jdf_sample_jobticket_file.jdf.
- 4. Double-click on the Job Ticket Parser: JDF Node. The settings screen opens:



- 5. In the left panel, set the following values:
 - $\circ~$ Enabled checkbox: Select the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
- 6. In the **Job Ticket Reference** pane (far-right), locate the **Open** icon:

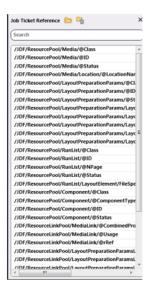


7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above (jdf_sample_jobticket_file.jdf).

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8. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel, as noted in the following image:



Note: When the JDF job ticket is loaded, some values are automatically mapped in the main panel. Remaining unmapped XPaths need to be manually mapped using drag-and-drop. The **Inter Sheet Settings** and Others' Path Range Paths and the must always be mapped manually.

Note: If a value is not automatically mapped or if a required option DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

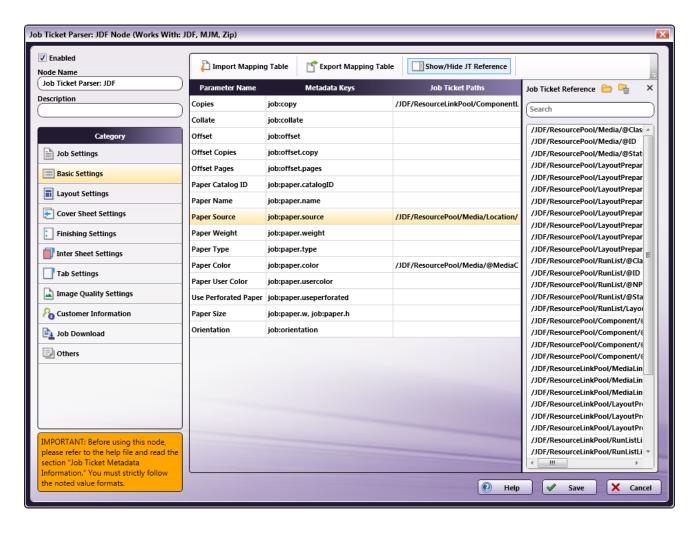
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

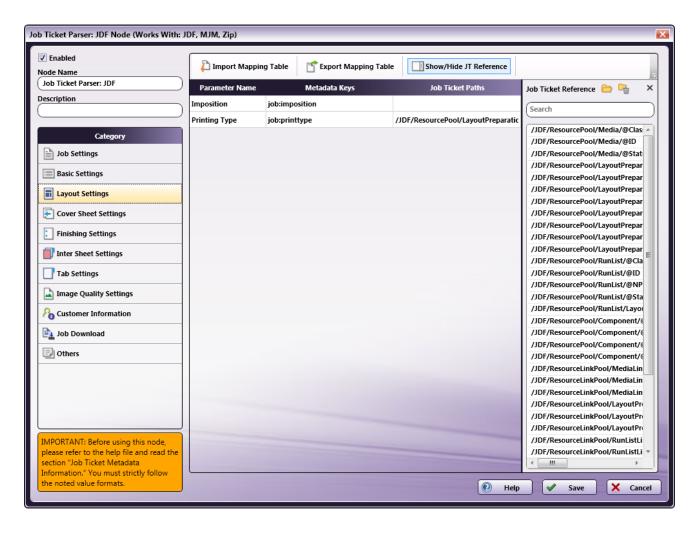
1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 2. The following values from the Job Ticket Reference panel are automatically moved to their Job Tickets Paths cells:
 - /JDF/ResourceLinkPool/ComponentLink/@Amount -> Copies
 - /IDF/ResourcePool/Media/Location/@LocationName -> Paper Source
 - /JDF/ResourcePool/Media/@MediaColorName -> Paper Color
- 3. If they are not automatically mapped:
 - Drag-and-drop /JDF/ResourceLinkPool/ComponentLink/@Amount to the Job Ticket Paths cell of the Copies row.
 - Drag-and-drop /JDF/ResourcePool/Media/Location/@LocationName to the Job Ticket Paths cell of the Paper Source row.
 - Drag-and-drop /JDF/ResourcePool/Media/@MediaColorName to the Job Ticket Paths cell of the Paper Color row.
- 4. The values that were either automatically moved or manually dragged-and-dropped are removed from the **Job Ticket Reference** panel.
- 5. In the Category panel, click the Layout Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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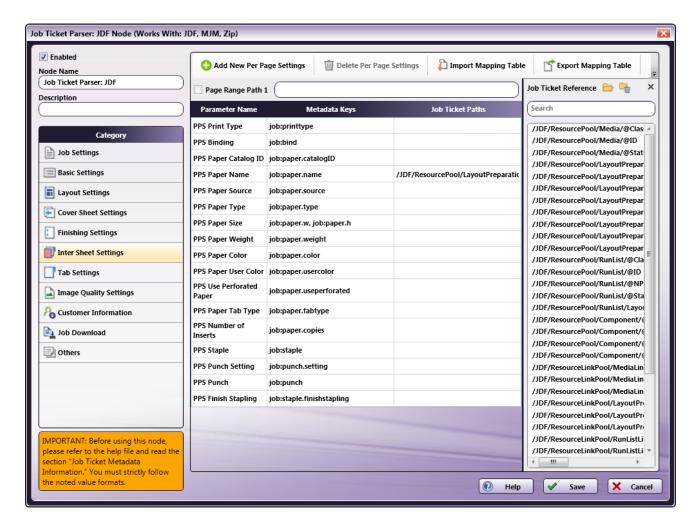
- 6. The following value from the Job Ticket Reference panel is automatically moved to its Job Tickets Paths cell:
 - /JDF/ResourcePool/LayoutPreparationParams/@Sides -> Printing Type
- 7. If they are not automatically mapped:
 - Drag-and-drop /JDF/ResourcePool/LayoutPreparationParams/@Sides to the Job Ticket Paths cell of the Printing Type row.
- 8. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 9. Repeat the same procedure for other **Category** options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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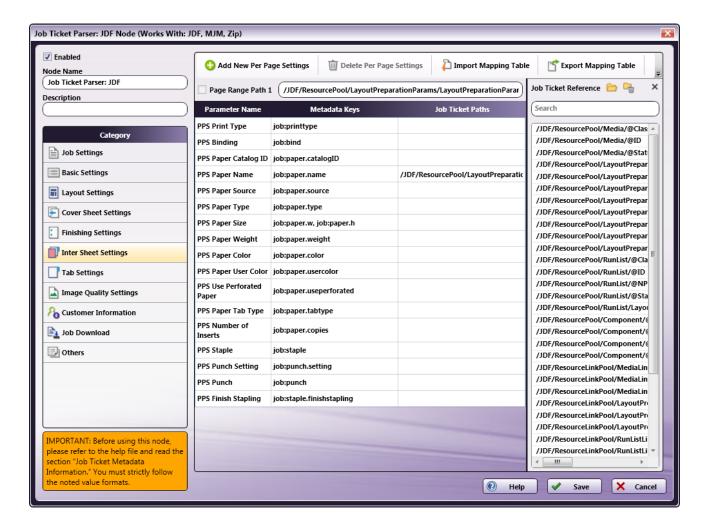


2. From the **Job Ticket Reference** panel, drag-and-drop **/JDF/ResourcePool/LayoutPreparationParams/LayoutPreparationParams/@RunIndex** to the **Page Range Path 1** text box.

Note: Page Range Path** value should start with "/JDF/" pattern.

- From the Job Ticket Reference panel, drag-and-drop /JDF/ResourcePool/LayoutPreparationParams/LayoutPreparationParams/Media/@DescriptiveName to the Job Ticket Paths field for PPS Paper Name.
- ${\bf 4.\ Once\ these\ actions\ are\ completed,\ the\ screen\ will\ appear\ as\ shown\ in\ the\ following\ image:}$

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- 5. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 6. Repeat the same procedure for other **Category** options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Three values are supported: **Retrieve from Local Path**, **Download from URL**, and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample JDF Job Ticket Files:

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- "File": "file"
- "URL": "C:\Temp\Testfile.pdf"

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- "File": "http"
- "URL": "http://10.146.171.98/testapp8/Testfile.pdf"

Note: The file type keyword "http" and the file type keyword written in the input job tick-et file must match.

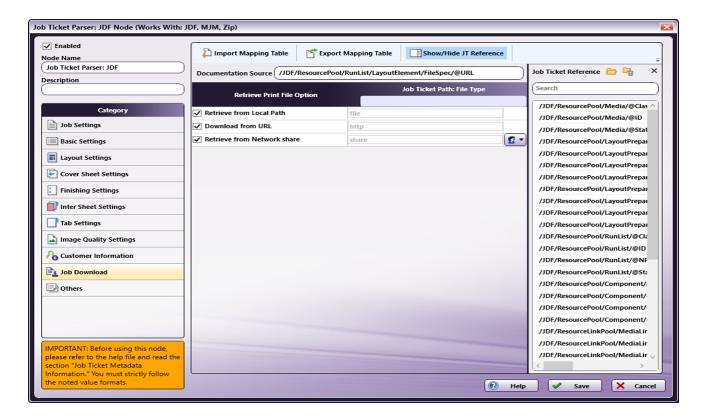
Retrieve from Network share

- "File": "share"
- "share": "\\11.12.13.14\Temp\Testfile.pdf"

Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

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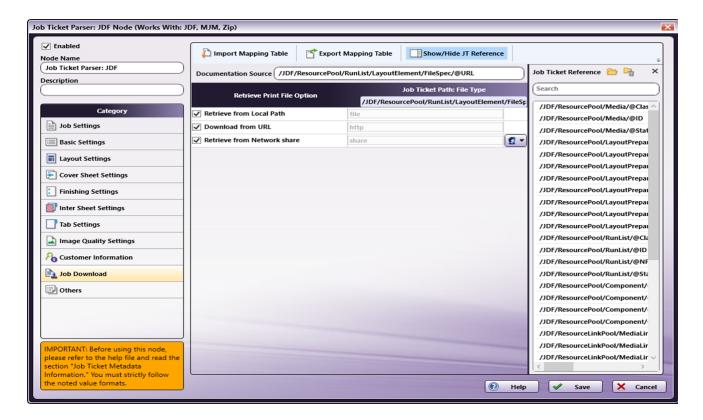
1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- 2. In the Retrieve from File Option column, select the checkboxes of all three options: Retrieve from Local Path, Download from URL, and Retrieve from Network share.
- 3. From the Job Ticket Reference panel, drag-and-drop /JDF/ResourcePool/RunList/LayoutElement/FileSpec/@URL to the Documentation Source field.
- 4. From the Job Ticket Reference panel, drag-and-drop /JDF/ResourcePool/RunList/LayoutElement/FileSpec/@File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

Note: If **Retrieve from Network share** is selected, you will need to enter network credentials. Select the Network Credentials button 2 to access the Network Credentials window; on this window, you can enter username and appropriate password.

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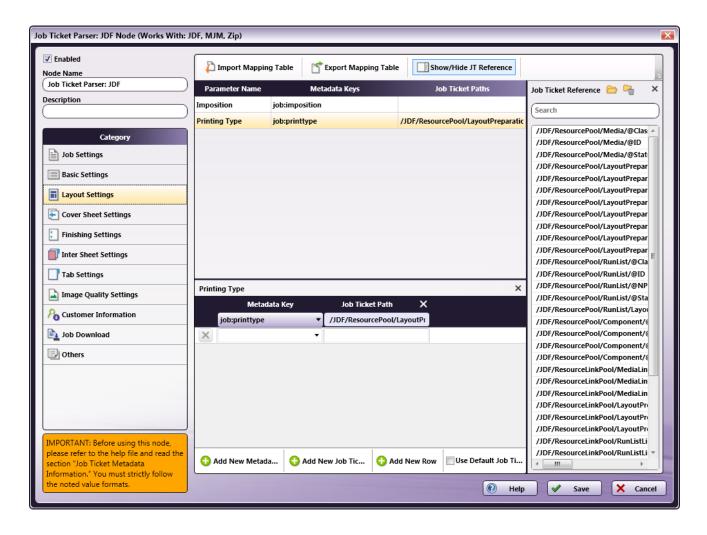
- 6. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 7. Repeat the same procedure for other **Category** options, as required.

Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **/JDF/ResourcePool/LayoutPreparationParams/@Sides**.

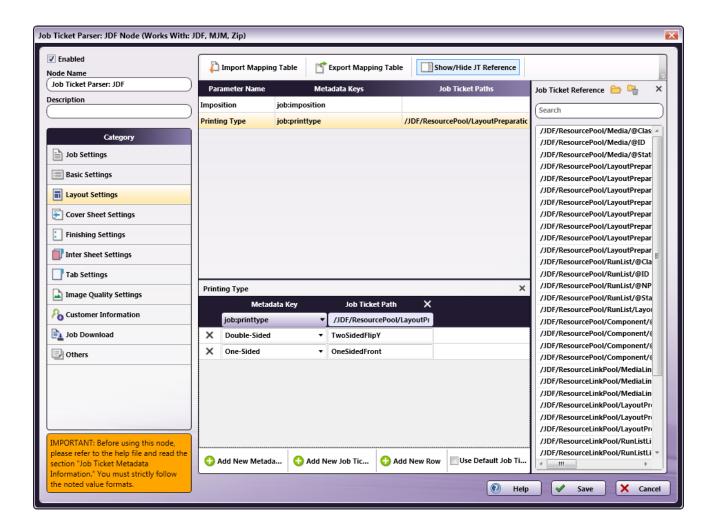
- 1. In the ${\bf Category}$ panel, click the ${\bf Layout~Settings}$ option.
- 2. Click on **Printing Type** row to open the **Value Map** panel:

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3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map row:

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- 4. In the first row, select Double-Sided from the Metadata Key drop-down menu and enter TwoSidedFlipY for the Job Ticket Path.
- 5. If the metadata's value is **Double-Sided**, the job ticket will write the value as **TwoSidedFlipY**.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter OneSidedFront for the Job ticket path.
- 7. If the metadata's value is **One-Sided**, the job ticket will write the value as @**Sides** as **OneSidedFront**.
- 8. When finished, click **Save**. To undo the changes, click **Cancel**.

Sample of a Job Ticket Parser: JDF Node Workflow



In the workflow above a job ticket file (e.g., jdf_sample_jobticket_file.jdf) is moved to the Input Folder. This is sent to the Job Ticket Parser: JDF Node where the job ticket JDF is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: JDF Node's settings. When this is completed, the data is transferred to the Metadata to File Node where it is converted to an XML document. From there, the XML document is transferred to an Output Folder.

Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: XML Node.

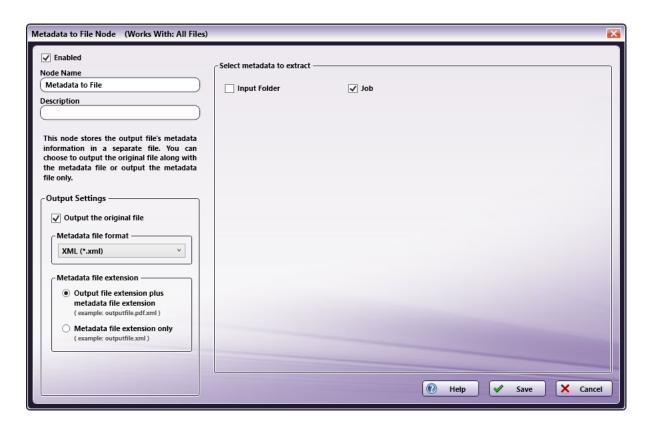
Job Ticket Parser: JDF Node: The purpose and instructions for setting up this node are noted in the discussion that precedes this section.

Metadata to File Node: This node extracts the configured metadata, saves it as an XML file, and then sends the file to the next node in the workflow. Follow these steps to configure the Metadata to File Node:

1. Open the Metadata to File Node by double-clicking the node's icon.

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- 2. Make sure the **Enabled** checkbox is selected.
- 3. In the Output Settings panel, select the Output the original file checkbox, and then select XML (*.xml) from the Metadata file format drop-down.
- 4. In the Metadata file extension panel, select the Output File extension plus metadata file extension radio button.
- 5. In the **Select metadata to extract** panel, select the **Job** checkbox.
- 6. Click **Save** to apply the changes.



Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<meta group="job" name="copy">
   <document>10</document>
</meta>
<meta group="job" name="file.URL">
   <document>c:\Temp\Testfile.pdf </document>
<meta group="job" name="name">
   <document>JDF job</document>
</meta>
<meta group="job" name="paper.color">
   <document>Yellow</document>
</meta>
<meta group="job" name="paper.name">
    <page number="1">test</page>
    <page number="2">test</page>
   <page number="3">test</page>
    <page number="4">test</page>
   <page number="5">test</page>
<meta group="job" name="printtype">
   <document>Double-Sided</document>
</meta>
<meta group="job" name="ticket.file">
   < document > C: \Pac a minolta \\ conops d var blox \\ node = 2 tmp. d 170711153423.042 \\ = 000001jdf_sample\_jobticket\_file.jdf </br>
```

Limitations

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Important!

1. The ZIP file that can be input to this node should contain PDF and JDF files only. When folder containing PDF and JDF files is zipped and given as input, this type of ZIP file is not supported.

Job Ticket Parser: JSON



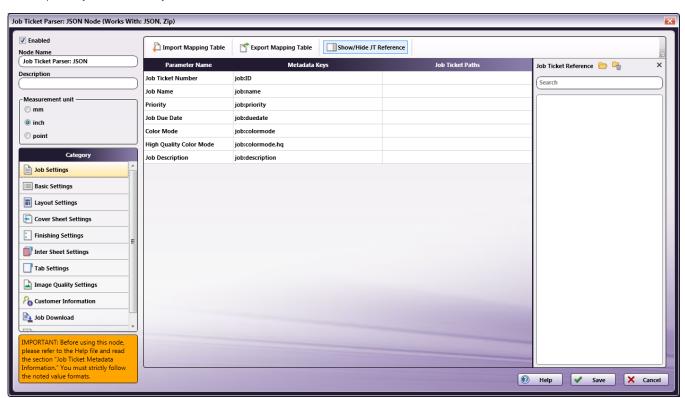
Note: This node works with JSON and Zip (JSON+PDF) files. The JSON file must be in UTF-8(No BOM) format.

The **Job Ticket Parser: JSON Node** is used to parse the information in a JSON file, and then write the parsed information as metadata. The JSON file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

The PDF file location is noted in the JSON file's URL field and the PDF file is downloaded to the node using that information. If the input file is a ZIP file (JSON + PDF), the file is unzipped, and then the JSON file is processed.

Using the Job Ticket Parser: JSON Node

Add the Job Ticket Parser: JSON Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Parser: JSON Node:



Use the window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Job Ticket Parser: JSON Node.
- In the **Description** field, enter a description for the Job Ticket Parser: JSON Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.

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Note: By default, inch displays for all English locale systems. All other locales default to mm. Regardless of the locale, any option may be selected.

- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, Paper Unit, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- Finishing Settings: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- **Job Download**: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the Others Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:



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- Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings
 category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

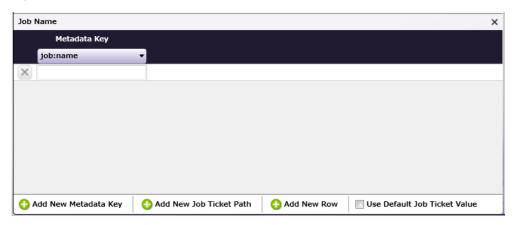
Use this panel to define the mapping values between the job ticket parameters and the **Dispatcher Metadata**. Click each category option to open the **Parameter Name/Metadata Key** values in the main panel.

Parameter Name	Metadata Keys	Job Ticket Paths
Job Ticket Number	job:ID	
Job Name	job:name	
Priority	job:priority	
Job Due Date	job:duedate	
Color Mode	job:colormode	
High Quality Color Mode	job:colormode.hq	
Job Description	job:description	

- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the JSON Path that corresponds to each job ticket parameter.

Value Map Panel

Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.



- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

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Job Ticket Reference Panel



To open a sample job ticket file, click the **Open** button (<u>></u>). Once a job ticket is selected, all possible JSON Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of the Mapping Table

Job Ticket parameters often need to be converted into a different format, either for storage or so that a certain task may be performed on the job ticket. Conversion (or parsing) of a job ticket into metadata makes it possible for the job ticket to be read for such tasks. This node supports conversion to the ISON format.

Job Ticket File

Before starting to work with this node, a JSON job ticket file must be generated.

Note: Once the Job Ticket Parser: JSON Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

\Program Files\Common Files\Konica Minolta\Phoenix\Resources\JobTicketParserJSONNode

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

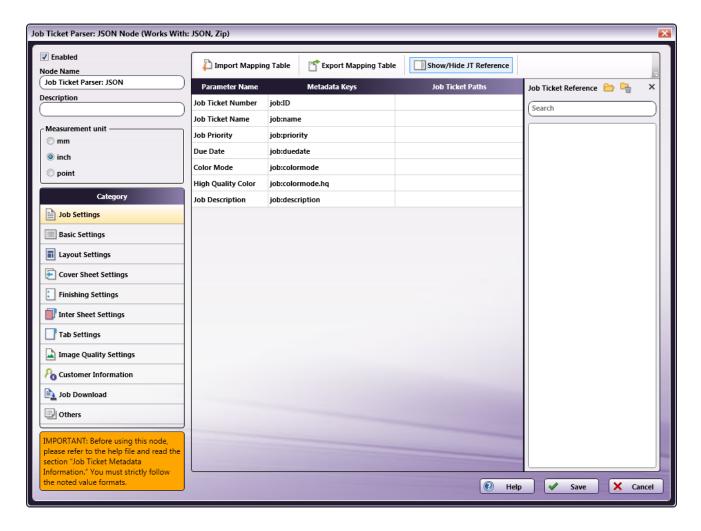
The Job Ticket Parser: JSON Node defines job ticket parameters using Document- and Per Page Settings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

```
"Ticket": {
        "Name": "Sample JSON Job",
        "Quantity": 5,
        "Duplex": "On",
        "Media":{
            "Color": "Yellow"
        "File": "file",
        "Src": "C:\Temp\Testfile.pdf",
        "PageException": [
            {
                 "Range": "1-5",
                "Media": {
                     "PaperName": "A4"
            }
        ]
}
```

Configure the Mapping Table Using the Job Ticket File

- 1. Using a text editor, copy the sample JSON file above.
- 2. The Source Path("Src") noted in the sample job ticket (explained in the example above), needs to be changed so that the path is valid.
- 3. Save the sample locally as <code>json_sample_jobticket_file.json</code>.
- 4. Double-click on the Job Ticket Parser: JSON Node. The settings screen opens:

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- 5. In the left panel, set the following values:
 - Enabled checkbox: Select the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
 - Measurement unit: Select a radio button.

Note: If the metadata value {**job:paper.unit**} is included in the input Job Ticket, that value will overwrite any value selected in the **Measurement Unit** field.

6. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:

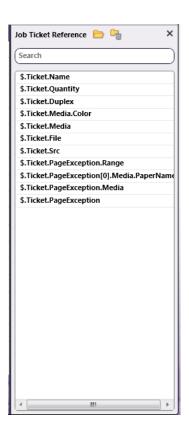


7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above_(json_sample_jobticket_file.json)_.

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8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel, as noted in the following image:



Note: When a job ticket is loaded, it needs to be mapped by dragging-and-dropping the correct values from the **Job Ticket reference** panel. If a value DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

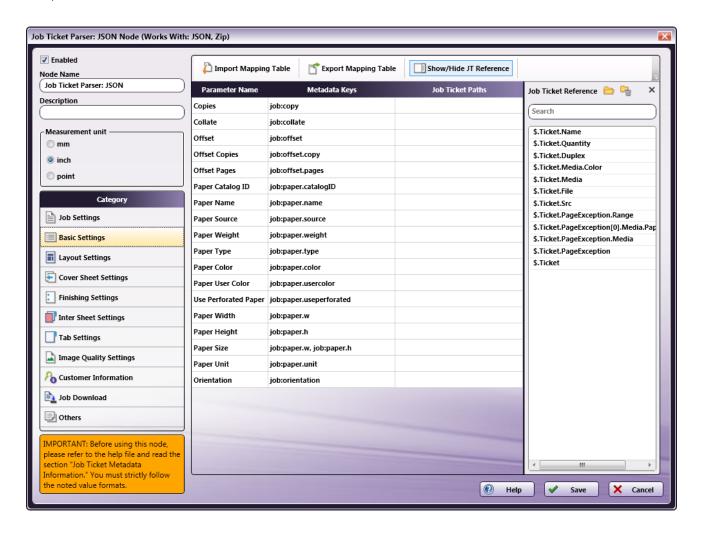
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

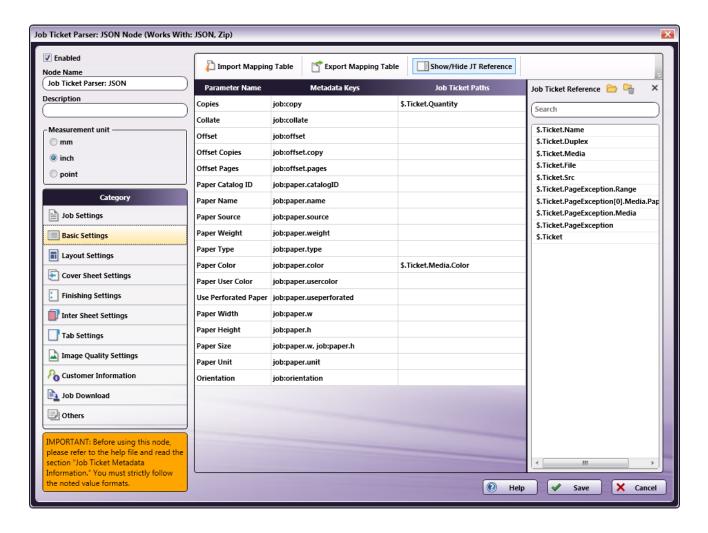
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1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



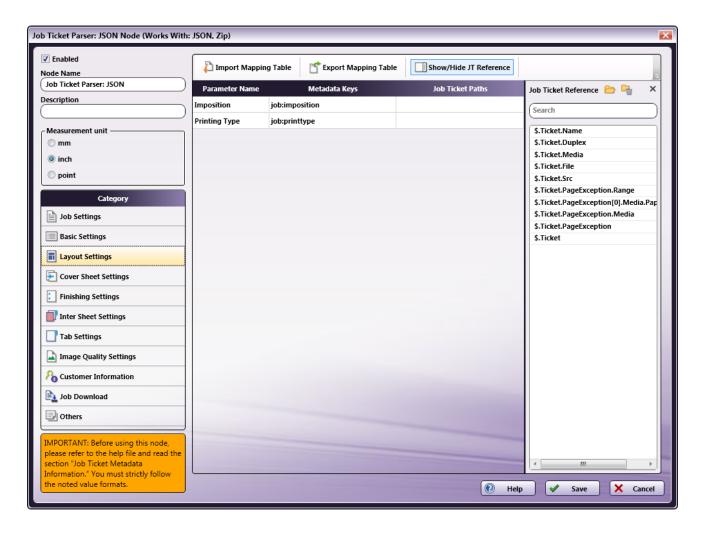
- 2. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 3. Drag-and-drop \$.Ticket.Quantity to the Job Ticket Paths cell of the Copies row. Drag-and-drop \$.Ticket.Media.Color to the Job Ticket Paths cell of the Paper Color row.
- 4. The values that were dragged-and-dropped are removed from the **Job Ticket Reference** panel:

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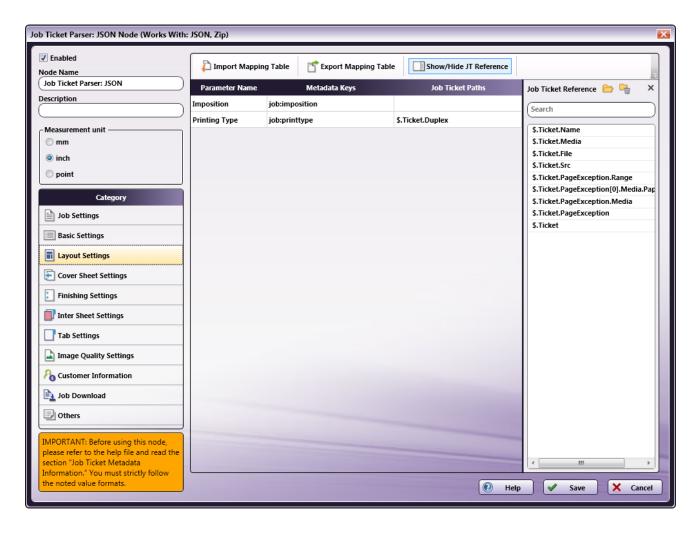
5. In the Category panel, click the Layout Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 6. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 7. Drag-and-drop **\$.Ticket.Duplex** to the **Job Ticket Paths** cell of the **Printing Type** row.

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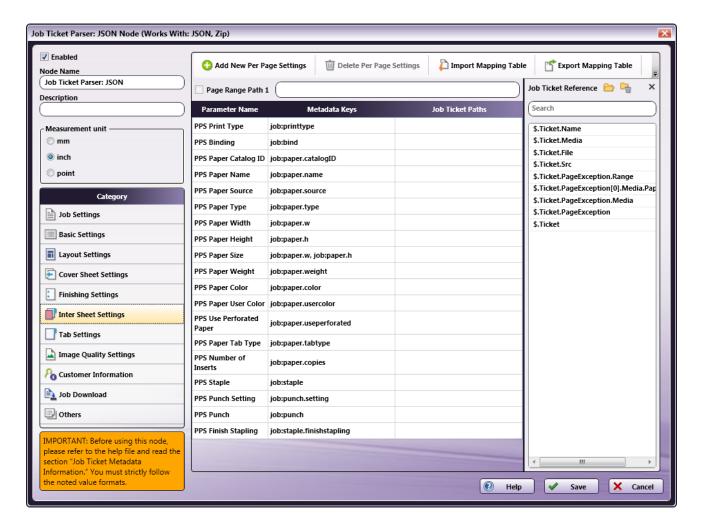
- 8. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 9. Repeat the same procedure for other **Category** options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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2. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.PageException.Range to the Page Range Path 1 text box.

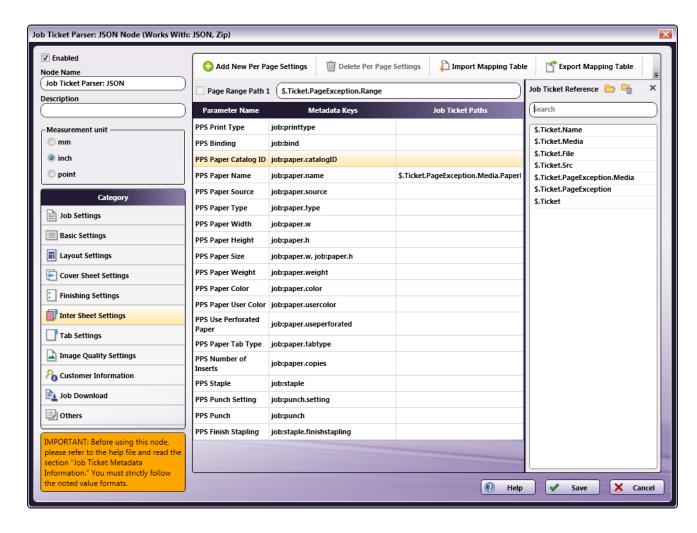
Note: Page Range Path value should start with "\$." pattern.

3. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.PageException[0].Media.PaperName to the Job Ticket Paths cell of the PPS Paper Name row.

 $\textbf{Note:} \ \mathsf{Change} \ \mathsf{PageException}[0] \ \mathsf{to} \ \mathsf{PageException}.$

 ${\bf 4.\ Once\ these\ actions\ are\ completed,\ the\ screen\ will\ appear\ as\ shown\ in\ the\ following\ image:}$

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- 5. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 6. Repeat the same procedure for other **Category** options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Four values are supported: **Retrieve from Local Path**, **Download from URL**, **Retrieve Encoded base64 from Job Ticket** (the PDF data in the form of embedded base64 format), and **Retrieve from Network share**.

Sample JSON job ticket files:

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- "File": "file"
- "Src": "C:\Temp\Testfile.pdf"

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- "File": "http"
- "Src": "http://10.146.171.98/testapp8/Testfile.pdf"

Note: The file type keyword "http" and the file type keyword written in the input job ticket file must match.

Retrieve Encoded base64 from Job Ticket

• "File": "base64"

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• "Src": "xxddgdfexdgfgngn..."

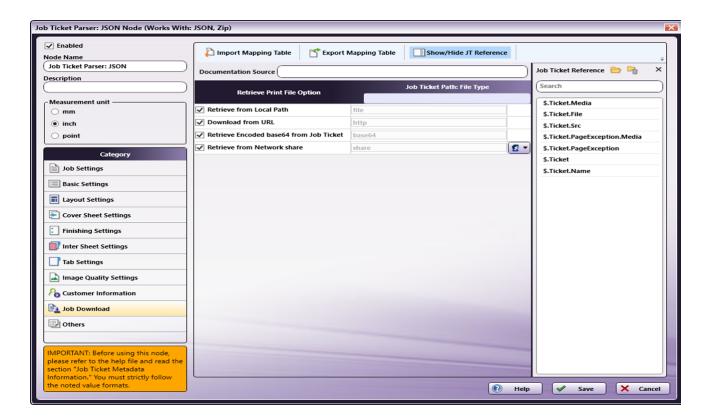
Note: The file type keyword "base64" and the file type keyword written in the input job ticket file must match.

Retrieve from Network share

- "File": "share"
- "Src": "\\11.12.13.14\Temp\Testfile.pdf"

Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

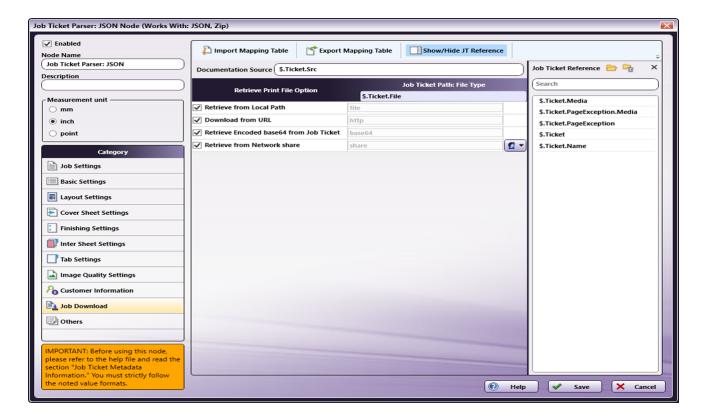
1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- 2. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 3. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.Src to the Documentation Source field.
- 4. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

Note: If **Retrieve from Network share** is selected, you will need to enter network credentials. Select the Network Credentials button to access the Network Credentials window; on this window, you can enter username and appropriate password.

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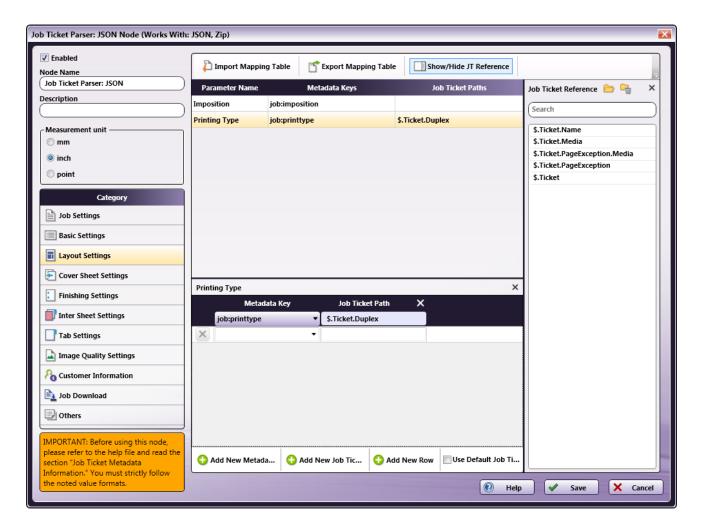
- 6. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 7. Repeat the same procedure for other **Category** options, as required.

Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **Duplex**.

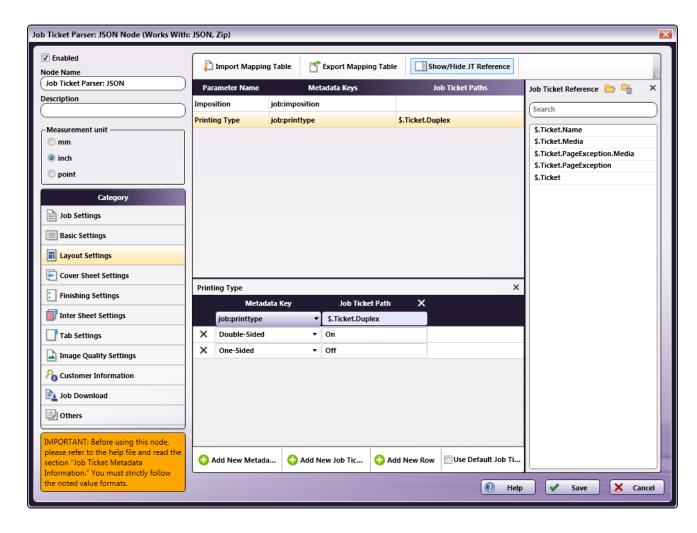
- 1. In the ${\bf Category}$ panel, click the ${\bf Layout~Settings}$ option.
- 2. Click on the $\bf Printing\ Type$ row to open the $\bf Value\ Map$ panel:

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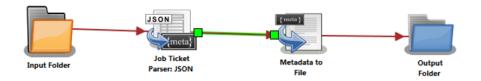
3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map

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- 4. In the first row, select Double-Sided from the Metadata Key drop-down menu and enter On for the Job Ticket Path.
- 5. If a job is sent to a node that has a **Duplex On** value and **Double-Sided** printing is selected, then **Double-Sided** printing is output in the metadata.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter Off for the Job Ticket Path.
- 7. If a job is sent to a node that has a **Duplex Off** value and **One-Sided** printing is selected, then **One-Sided** printing is output in the metadata.
- 8. When finished, click **Save**. To undo the changes, click **Cancel**.

Sample of a Job Ticket Parser: JSON Node Workflow



In the workflow above, a job ticket file (e.g., json_sample_jobticket_file.json) is moved to the Input Folder. This is sent to the Job Ticket Parser: JSON Node where the JSON job ticket is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: XML node's settings. When this is completed, the data is transferred to the Metadata to File Node where it is converted to an XML document. From there, the XML document is transferred to an Output Folder.

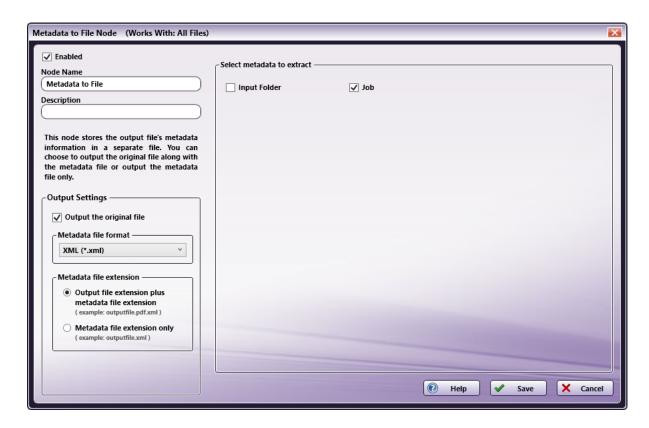
Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: JSON Node.

Job Ticket Parser: JSON Node: The purpose and instructions for setting up this node are noted in the discussion that precedes this section.

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Metadata to File Node: This node extracts the configured metadata, saves it as an XML file, and then sends the file to the next node in the workflow. Follow these steps to configure the Metadata to File Node:

- 1. Open the Metadata to File Node by double-clicking the node's icon.
- 2. Make sure the **Enabled** checkbox is selected.
- 3. In the Output Settings panel, select the Output the original file checkbox, and then select XML (*.xml) from the Metadata file format drop-down.
- 4. In the Metadata file extension panel, select the Output File extension plus metadata file extension radio button.
- 5. In the **Select metadata to extract** panel, select the **Job** checkbox.
- 6. Click **Save** to apply the changes.



Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<meta group="job" name="copy">
   <document>5</document>
</meta>
<meta group="job" name="file.URL">
   <document>C:\Temp\Testfile.pdf</document>
</meta>
<meta group="job" name="file.type">
   <document>file</document>
<meta group="job" name="paper.color">
   <document>Yellow</document>
</meta>
<meta group="job" name="paper.name">
   <page number="1">A4</page>
    <page number="2">A4</page>
    <page number="3">A4</page>
    <page number="4">A4</page>
    <page number="5">A4</page>
</meta>
<meta group="job" name="printtype">
   <document>Double-Sided</document>
<meta group="job" name="ticket.file">
```

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 $< document > C: \Pr{ogramData\Konica\Minolta\conopsd\var\blox\node_4\tmp.d\170711124550.049_000001json_sample_job_ticket_file.json</document > </meta > (meta > 0.00001json_sample_job_ticket_file.json</meta > (meta > 0.00001json_sample_job_ticket_file.jso$

Limitations

Important!

1. The ZIP file that can be input to this node should contain PDF and JSON files only. When folder containing PDF and JSON files is zipped and given as input, this type of ZIP file is not supported.

Job Ticket Parser: XML



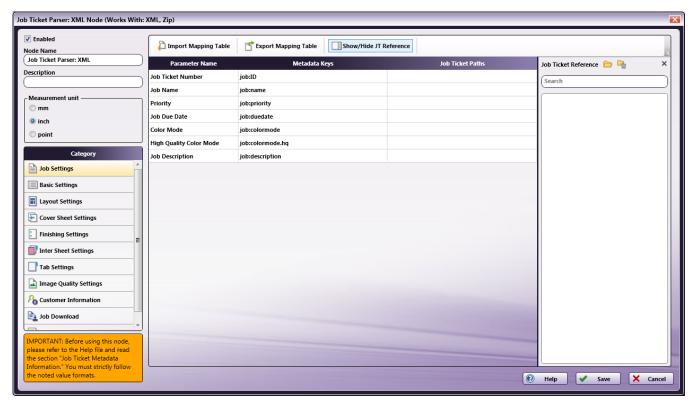
Note: This node works with XML and Zip (XML+PDF) files.. The XML file must be in UTF-8 format.

The **Job Ticket Parser: XML Node** is used to parse the information in an XML file, and then write the parsed information as metadata. The XML file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

The PDF file location is noted in the XML file's URL field and the PDF file is downloaded to the node using that information. If the input file is a ZIP file (XML + PDF), the file is unzipped, and then the XML file is processed.

Using the Job Ticket Parser: XML Node

Add the Job Ticket Parser: XML Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Parser: XML Node:



Use the window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the $\bf Node\ Name$ field, enter a meaningful name for the Job Ticket Parser: XML Node.

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- In the **Description** field, enter a description for the Job Ticket Parser: XML Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.

Note: By default, inch displays for all English locale systems. All other locales default to mm. Regardless of the locale, any option may be selected.

- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, Paper Unit, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- **Finishing Settings**: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- **Job Download**: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the **Others** Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:

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- Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

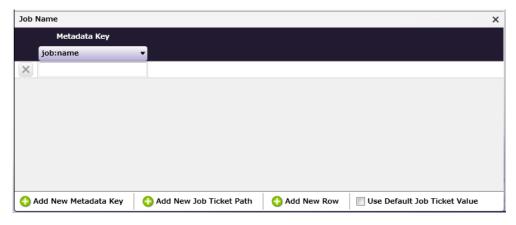
Use this panel to define the mapping values between the job ticket parameters and the **Dispatcher Metadata**. Click each category option to open the **Parameter Name/Metadata Key** values in the main panel.

Metadata Keys	Job Ticket Paths
job:ID	
job:name	
job:priority	
job:duedate	
job:colormode	
job:colormode.hq	
job:description	
	job:name job:priority job:duedate job:colormode job:colormode.hq

- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the XML Path that corresponds to each job ticket parameter.

Value Map Panel

Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.

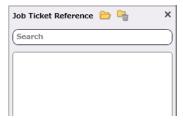


- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

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Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel



To open a sample job ticket file, click the **Open** button (). Once a job ticket is selected, all possible XML Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of the Mapping Table

Job Ticket parameters often need to be converted into a different format, either for storage or so that a certain task may be performed on the job ticket. Conversion (or parsing) of a job ticket into metadata makes it possible for the job ticket to be read for such tasks. This node supports conversion to the XML format.

Job Ticket File

Before starting to work with this node, an XML job ticket file must be generated.

Note: Once the Job Ticket Parser: XML Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

\Program Files\Common Files\Konica Minolta\Phoenix\Resources\JobTicketParserXMLNode

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

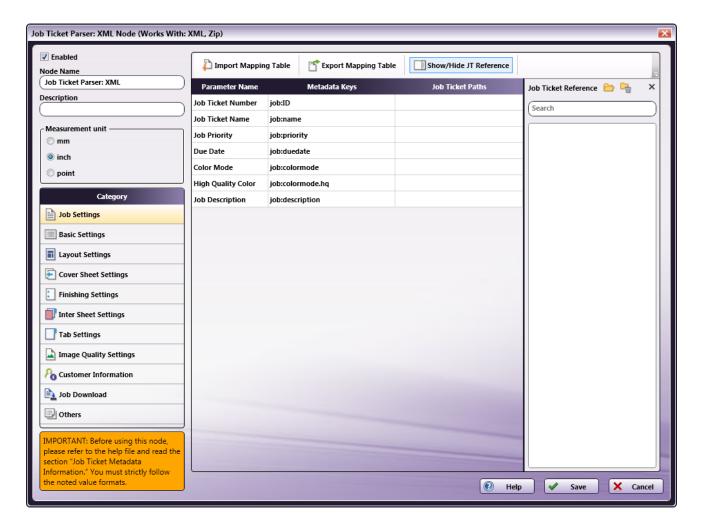
The Job Ticket Parser: XML Node defines job ticket parameters using Document- and Per Page Settings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

```
<Ticket>
    <Name>Sample XML Job</Name>
    <Quantity>5</Quantity>
    <Duplex>On</Duplex>
    <Media>
       <Color>Yellow</Color>
    <Src>C:\Temp\Testfile.pdf</Src>
    <File>file</File>
    <PageException>
        <PerPageSetting>
          <PageRange>1-5</PageRange>
          <Media>
            <PaperName>A4</PaperName>
          </Media>
        </PerPageSetting>
    </PageException>
</Ticket>
```

Configure the Mapping Table Using the Job Ticket File

- 1. Using a text editor, copy the sample XML file above.
- 2. The Source Path("Src") noted in the sample job ticket (explained in the example above), needs to be changed so that the path is valid.
- 3. Save the sample locally as xml_sample_jobticket_file.xml.
- 4. Double-click on the Job Ticket Parser: XML Node. The settings screen opens:

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- 5. In the left panel, set the following values:
 - Enabled checkbox: Select the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
 - Measurement unit: Select a radio button.

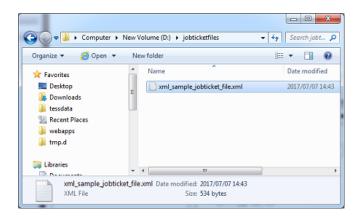
Note: If the metadata value {job:paper.unit} is included in the input Job Ticket, that value will overwrite any value selected in the **Measurement Unit** field.

6. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:



7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above (xml_sample_jobticket_file.xml).

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8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel, as noted in the following image:



Note: When a job ticket is loaded, it needs to be mapped by dragging-and-dropping the correct values from the **Job Ticket reference** panel. If a value DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

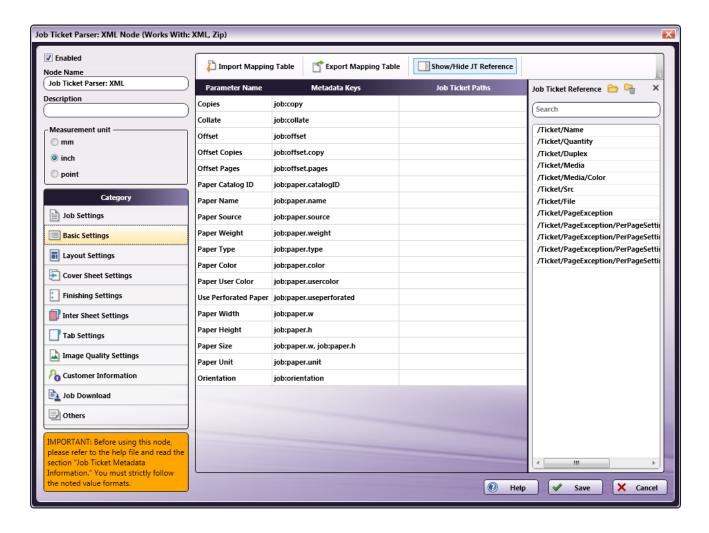
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

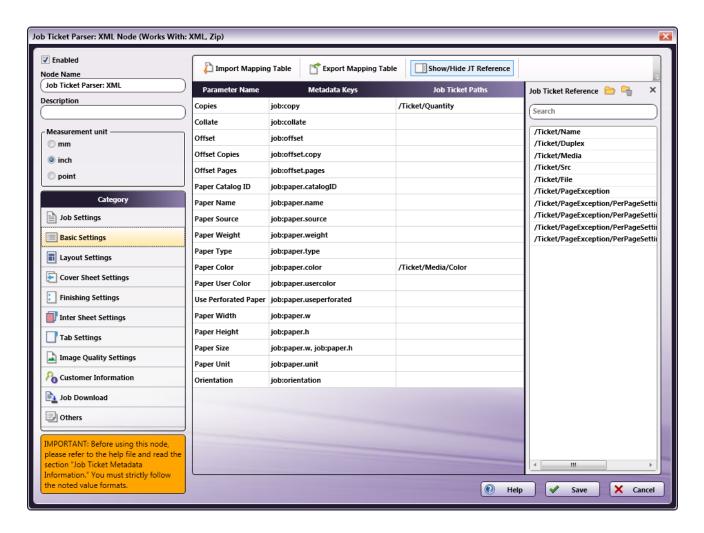
1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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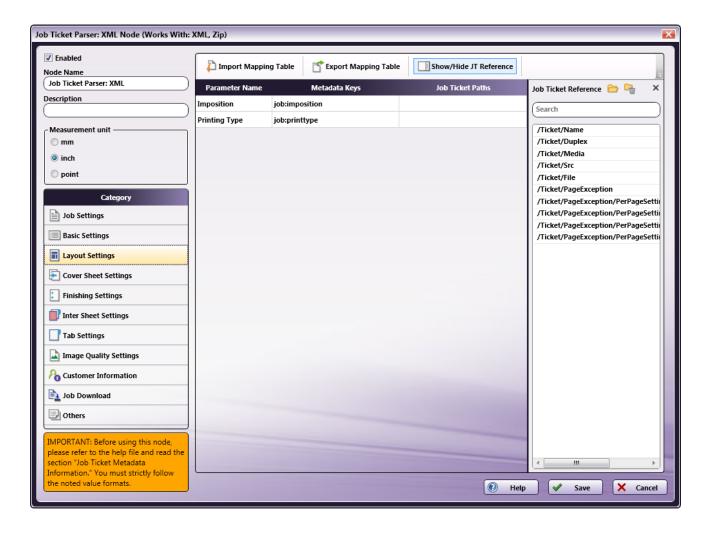
- 2. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 3. Drag-and-drop /Ticket/Quantity to the Job Ticket Paths cell of the Copies row. Drag-and-drop /Ticket/Media/Color to the Job Ticket Paths cell of the Paper Color row.
- $4. \ \ The \ values \ that \ were \ dragged-and-dropped \ are \ removed \ from \ the \ \textbf{\textit{Job Ticket Reference}} \ panel:$

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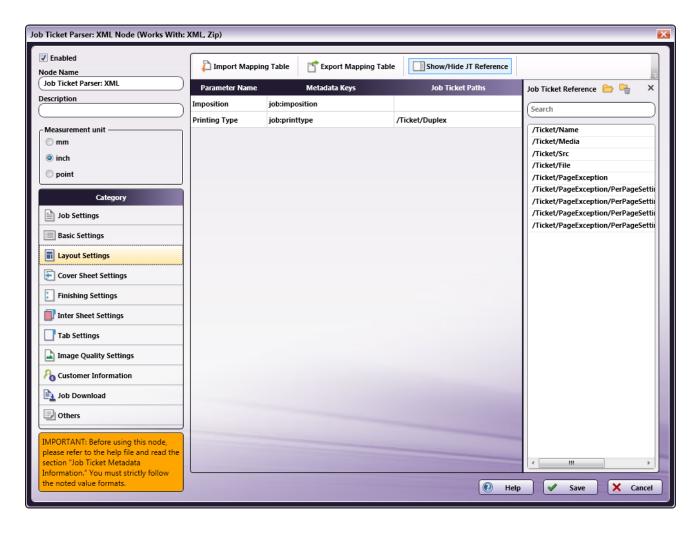
5. In the Category panel, click the Layout Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 6. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 7. Drag-and-drop /Ticket/Duplex to the Job Ticket Paths cell of the Printing Type row.

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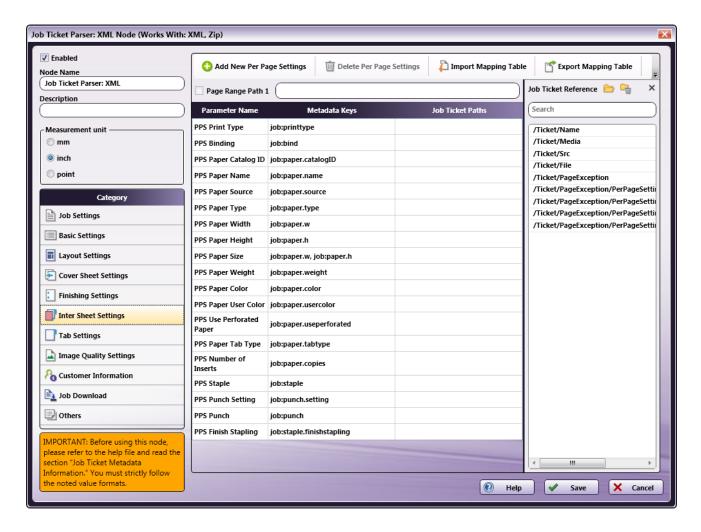
- 8. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 9. Repeat the same procedure for other **Category** options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable, and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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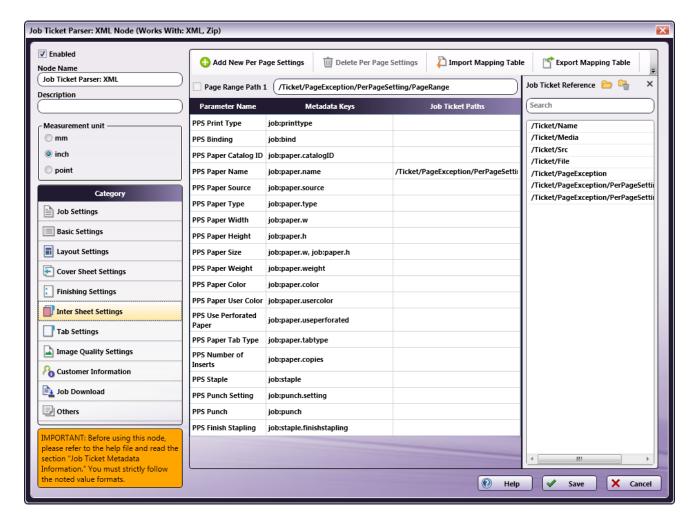


2. From the **Job Ticket Reference** panel, drag-and-drop /**Ticket/PageException/PerPageSetting/PageRange** to the **Page Range Path 1** text

Note: Page Range Path value should start with "/Ticket/" pattern.

- 3. From the Job Ticket Reference panel, drag-and-drop /Ticket/PageException/PerPageSetting/Media/PaperName to the Job Ticket Paths cell of the PPS Paper Name row.
- 4. Once these actions are completed, the screen will appear as shown in the following image:

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- 5. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 6. Repeat the same procedure for other **Category** options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Four values are supported: **Retrieve from Local Path**, **Download from URL**, **Retrieve Encoded base64 from Job Ticket** (the PDF data in the form of embedded base64 format), and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample XML Job Ticket Files:

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- <Src>C:\Temp\Testfile.pdf</Src>
- <File>file</File>

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- <Src>http://10.146.171.98/testapp8/Testfile.pdf</Src>
- <File>http</File>

Note: The file type keyword "http" and the file type keyword written in the input job tick-et file must match.

Retrieve Encoded base64 from Job Ticket

- <Src>xxddgdfexdgfgngn...</Src>
- <File>base64</File>

Note: The file type keyword "base64" and the file type keyword written in the input job ticket file must match.

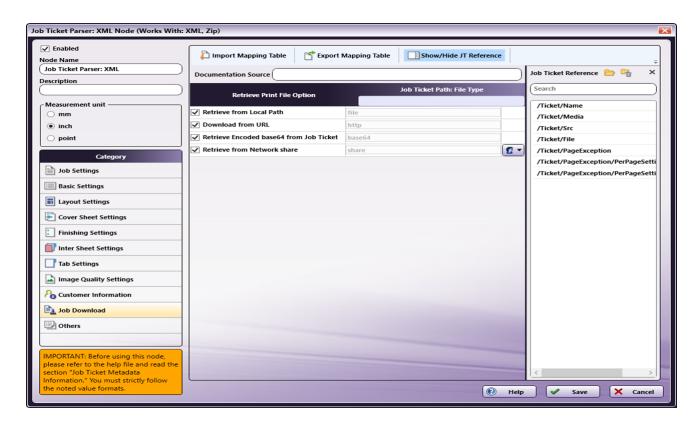
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Retrieve from Network share

- <Src>\\11.12.13.14\Temp\Testfile.pdf</Src>
- <File>share</File>

Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

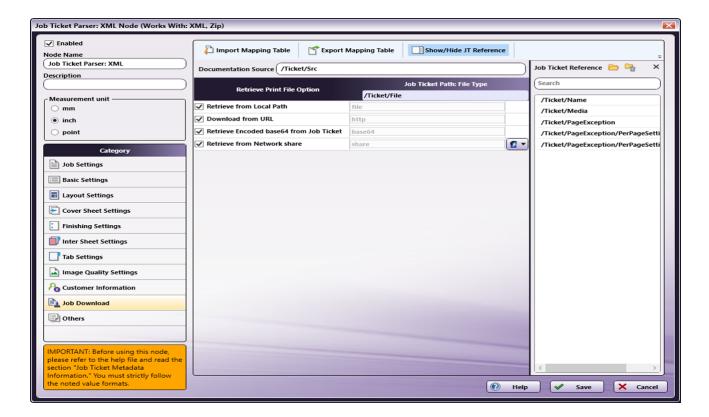
1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- 2. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 3. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 4. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

Note: If **Retrieve from Network share** is selected, you will need to enter network credentials. Select the Network Credentials button to access the Network Credentials window; on this window, you can enter username and appropriate password.

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- 6. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 7. Repeat the same procedure for other **Category** options, as required.

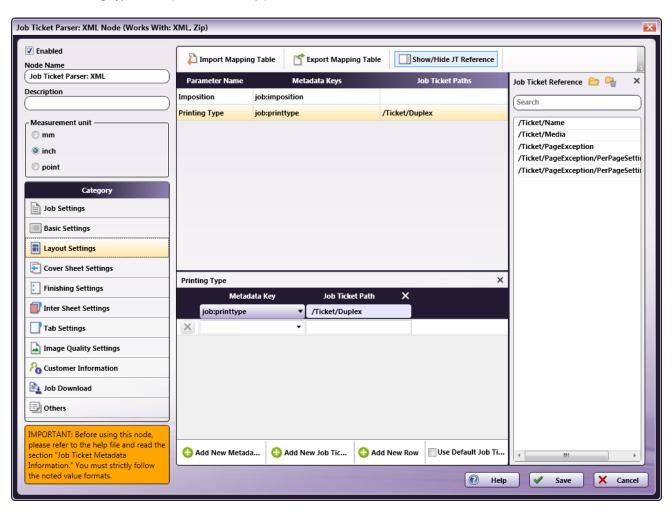
Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **Duplex**.

1. In the Category panel, click the Layout Settings option.

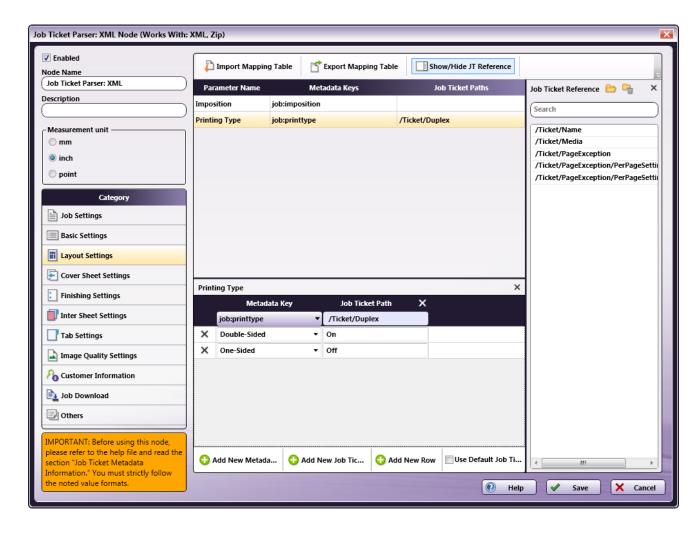
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2. Click on the **Printing Type** row to open the **Value Map** panel:



3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map

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- 4. In the first row, select Double-Sided from the Metadata Key drop-down menu and enter On for the Job Ticket Path.
- 5. If a job is sent to a node that has a **Duplex On** value and **Double-Sided** printing is selected, then **Double-Sided** printing is output in the metadata.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter Off for the Job Ticket Path.
- 7. If a job is sent to a node that has a **Duplex Off** value and **One-Sided** printing is selected, then **One-Sided** printing is output in the metadata.
- 8. When finished, click Save. To undo the changes, click Cancel.

Sample of a Job Ticket Parser: XML Node Workflow



ticket file (e.g., xml_sample_jobticket_file.xml) is moved to the Input Folder. This is sent to the Job Ticket Parser: XML Node where the job ticket XML is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: XML Node's settings. When this is completed, the data is transferred to the Metadata to File Node where it is converted to an XML document. From there, the XML document is transferred to an Output Folder.

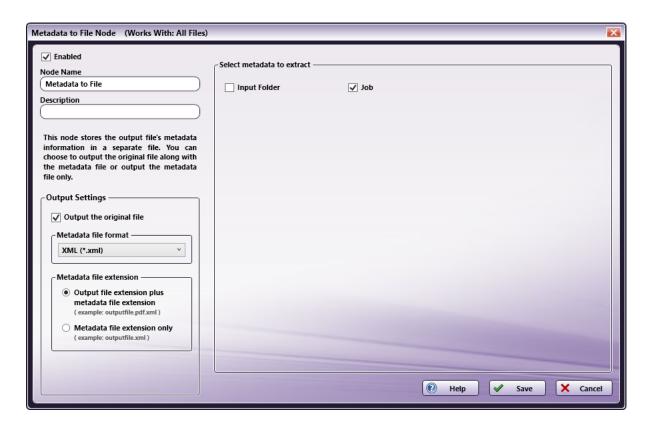
Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: XML Node.

Job Ticket Parser: XML Node: The purpose and instructions for setting up this node are noted in the discussion that precedes this section.

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Metadata to File Node: This node extracts the configured metadata, and then sends the file to the next node in the workflow. Follow these steps to configure the Metadata to File Node:

- 1. Open the Metadata to File Node by double-clicking the node's icon.
- 2. Make sure the **Enabled** checkbox is selected.
- 3. In the Output Settings panel, select the Output the original file checkbox, and then select XML (*.xml) from the Metadata file format drop-down.
- 4. In the Metadata file extension panel, select the Output File extension plus metadata file extension radio button.
- 5. In the **Select metadata to extract** panel, select the **Job** checkbox.
- 6. Click **Save** to apply the changes.



Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<meta group="job" name="copy">
    <document>5</document>
</meta>
<meta group="job" name="file.URL">
    <document>C:\Temp\Testfile.pdf</document>
<meta group="job" name="file.type">
    <document>file</document>
</meta>
<meta group="job" name="paper.color">
    <document>Yellow</document>
<meta group="job" name="paper.name">
    <page number="1">A4</page>
    <page number="2">A4</page>
    <page number="3">A4</page>
    <page number="4">A4</page>
    <page number="5">A4</page>
</meta>
<meta group="job" name="printtype">
    <document>Double-Sided</document>
```

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Limitations

Important!

1. The ZIP file that can be input to this node should contain PDF and XML files only. When folder containing PDF and XML files is zipped and given as input, this type of ZIP file is not supported.

Job Ticket Generator: JDF



Note: This node works with PDF files (version 1.3 or later).

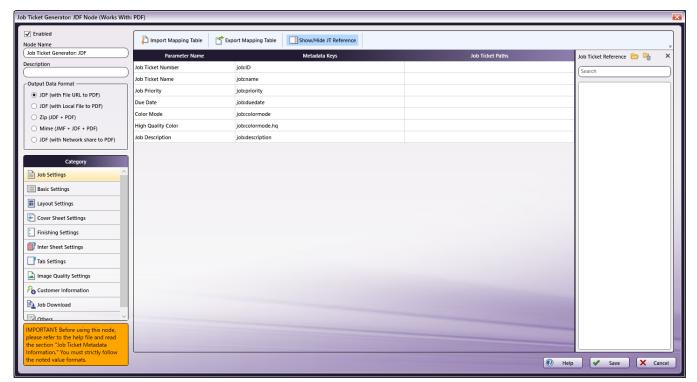
Use the **Job Ticket Generator: JDF Node** to create or update a JDF file with the corresponding metadata values of Dispatcher by using a Mapping Table file. If the JDF file path exists, the existing JDF file is updated with the corresponding metadata. If the JDF file path does not exist, the Job Ticket Generator: JDF Node loads the JDF file (IDP) and updates it with the corresponding metadata values.

If the submitted job ticket is either a ResourcePool or ResourceLinkPool item, the node will create the corresponding ResourceLinkPool or ResourcePool item (if it does not already exist). Both are then linked with a unique reference ID. If the value of JDF/@Type is Combined (IDP), the node will update the CombinedProcessIndex attribute of the ResourceLinkPool element based upon the suitable process type located in JDF/@Types. If a suitable process does not exist in JDF/@Types, the node will append a suitable process to JDF/@Types and update the corresponding CombinedProcessIndex.

The default *Usage* attribute value updated for any *ResourceLinkPool* item is *Input*, unless explicitly mentioned in the mapping table or when the element is already present in the input IDF file.

Using the Job Ticket Generator: JDF Node

Add the Job Ticket Generator: JDF Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Generator: JDF Node:



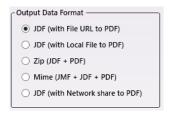
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Use this window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Job Ticket Generator: JDF Node.
- In the **Description** field, enter a description for the Job Ticket Generator: JDF Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the **Help** button to access online help.

Output Data Format

In the **Output Data Format** area, select the node output format:



The following options are supported:

- JDF (with File URL to PDF): A local PDF's URL is included in the generated job ticket's JDF file.
- JDF (with Local File to PDF): A local PDF file path is included in the generated job ticket's JDF file.
- ZIP (JDF+PDF): The node generates a JDF and a PDF file.
- Mime (JMF+JDF+PDF): The node generates a Mime (MJM) file.
- JDF (with Network share to PDF): Network shared PDF file path is included in the generated job ticket's JDF file.

Note: The MJM file contains the job ticket information and PDF content. The extracted job ticket file and PDF file are processed. The job ticket information in the MJM file contains JMF, JDF, and PDF content in the form of base 64.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, or Orientation.

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- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- **Finishing Settings**: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- **Job Download**: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the **Others** Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:



- · Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings
 category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

Use this panel to define the mapping values between the job ticket parameters and the **Dispatcher Metadata**. Click each category option to open the **Parameter Name/Metadata Key** values in the main panel.

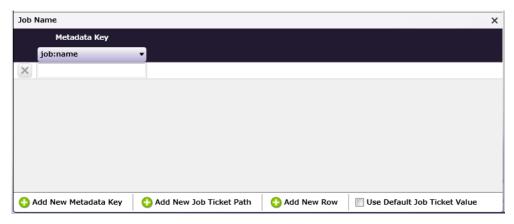
Parameter Name	Metadata Keys	Job Ticket Paths
Job Ticket Number	job:ID	
Job Name	job:name	
Priority	job:priority	
Job Due Date	job:duedate	
Color Mode	job:colormode	
High Quality Color Mode	job:colormode.hq	
Job Description	job:description	

- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the JDF Path that corresponds to each job ticket parameter.

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Value Map Panel

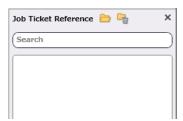
Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.



- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel



To open a sample job ticket file, click the **Open** button (). Once a job ticket is selected, all possible XML Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of the Mapping Table

Job Ticket File

The Job Ticket Generator: JDF Node converts metadata to a JDF job ticket file.

Note: Once the Job Ticket Generator: JDF Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

 $\verb|\Program Files|\Common Files|\KonicaMinolta|\Phoenix|\Resources|\JobTicketGeneratorJDFNode|\LocalFiles|\Resources|\LocalFiles|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\LocalFiles|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Resources|\Res$

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

The Job Ticket Generator: JDF Node defines job ticket parameters using Document- and Per Page Set-tings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

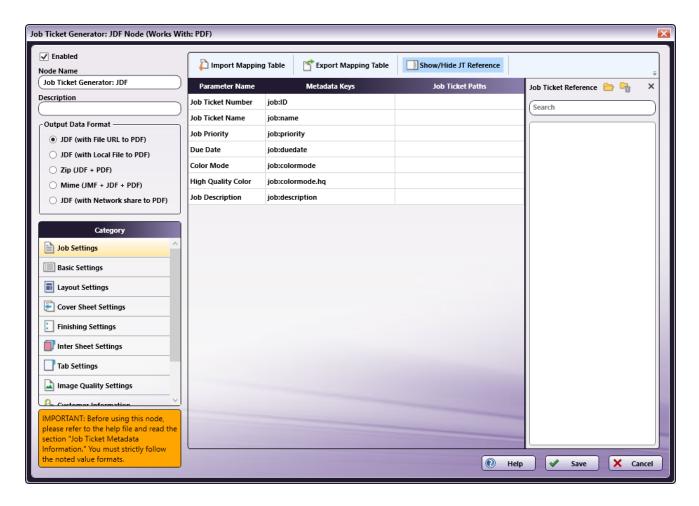
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```
<?xml version="1.0" encoding="UTF-8"?>
<JDF xmlns="http://www.CIP4.org/JDFSchema_1_1"</pre>
  xmlns:kmbs="http://www.konicaminolta.com/KMBS JDFExtension 1 1"
     xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="Combined">
  <ResourcePool>
    <Media Class="Consumable"
     ID="r170711 024318593 005119" MediaColorName="Yellow" Status="Available">
     <Location LocationName="AutoSelect"/>
    </Media>
    <LayoutPreparationParams Class="Parameter"</pre>
     ID="r170711_023611281_005743"
     Sides="TwoSidedFlipY" Status="Available">
     <LayoutPreparationParams RunIndex="0~4"</pre>
        kmbs:BindingEdge="Auto" kmbs:PerPageSet="Yes">
        <Media Class="Consumable" DescriptiveName="test">
         <Location LocationName="Auto"/>
        </Media>
     </LayoutPreparationParams>
    </LayoutPreparationParams>
        <RunList Class="Parameter" ID="r170707_053618136_000949" NPage="4" Status="Available">
      <LavoutElement>
        <FileSpec File="file" URL=" C:\Temp\Testfile.pdf "/>
      </LayoutElement>
    <Component Class="Quantity" ComponentType="FinalProduct"
     ID="r170711_024318596_005125" Status="Unavailable"/>
  </ResourcePool>
    <MediaLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_024318593_005119"/>
    <LayoutPreparationParamsLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_023611281_005743"/>
    <RunListLink CombinedProcessIndex="0 1" ProcessUsage="Document"</pre>
 Usage="Input" rRef="r170707_053618136_000949"/>
    <ComponentLink Amount="10" CombinedProcessIndex="4" Usage="Output" rRef="r170711_024318596_005125"/>
  </ResourceLinkPool>
  <CustomerInfo BillingCode="" CustomerID="" CustomerJobName="JDF job"/>
```

Configure the Mapping Table Using the Job Ticket File

- 1. Using a text editor, copy the sample JDF file above.
- 2. The URL Path noted in the Layout Element (explained in the example above), needs to be changed so that the path is valid.
- 3. Save the sample locally as $jdf_sample_jobticket_file.jdf$.
- 4. Double-click on the Job Ticket Generator: JDF Node. The settings screen opens:

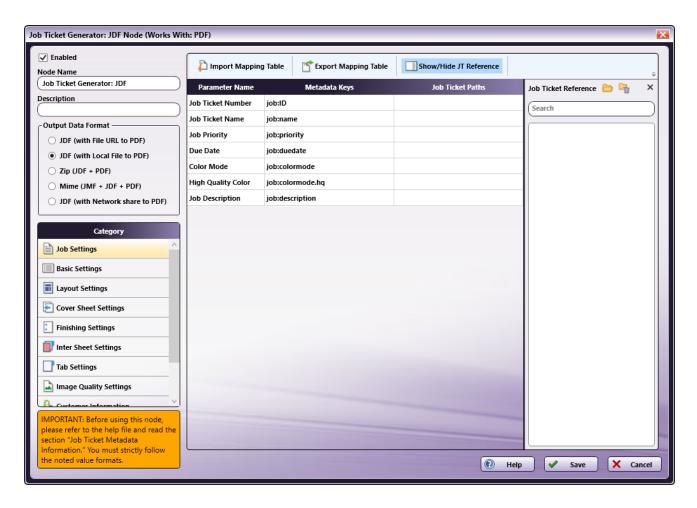
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5. In the left panel, set the following values:

- $\circ~$ Enabled checkbox: Select the checkbox so that the process will run.
- Node Name: Assign a name value to the node in the text field.
- Output Data format: Select the JDF (with Local File to PDF) radio button.

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6. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:

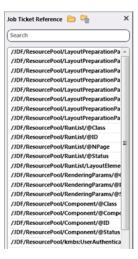


7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above (jdf_sample_jobticket_file.jdf).



8. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel, as noted in the following image:

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Note: When the JDF job ticket is loaded, some values are automatically mapped in the main panel. Remaining unmapped XPaths need to be manually mapped using drag-and-drop. The **Inter Sheet Settings and Others' Path Range Paths** and the must always be mapped manually.

Note: If a value is not automatically mapped or if a required option DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

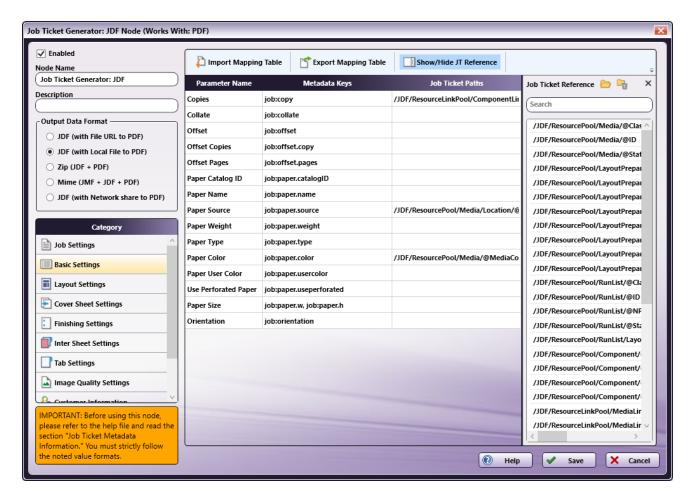
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

1. In the Category panel, click the **Basic Settings** option. The **Parameter Name**, **Metadata Keys**, and **Job Ticket Paths** columns display in the main panel:

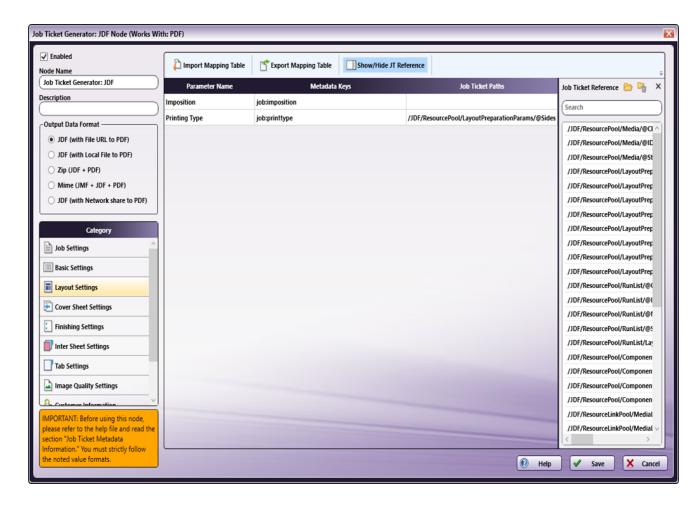
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- 2. The following values from the **Job Ticket Reference** panel are automatically moved to their **Job Tickets Paths** cells:

 - /JDF/ResourcePool/Media/Location/@LocationName -> Paper Source
 - /JDF/ResourcePool/Media/@MediaColorName -> Paper Color
- 3. If they are not automatically mapped:
 - $\circ \ \ \mathsf{Drag-and-drop} \ \ \mathsf{/JDF/ResourceLinkPool/ComponentLink/@Amount} \ \ \mathsf{to} \ \ \mathsf{the} \ \mathsf{Job} \ \ \mathsf{Ticket} \ \mathsf{Paths} \ \mathsf{cell} \ \ \mathsf{of} \ \mathsf{the} \ \ \mathsf{Copies} \ \mathsf{row}.$
 - Drag-and-drop /JDF/ResourcePool/Media/Location/@LocationName to the Job Ticket Paths cell of the Paper Source row.
 - Drag-and-drop /JDF/ResourcePool/Media/@MediaColorName to the Job Ticket Paths cell of the Paper Color row.
- 4. The values that were either automatically moved or manually dragged-and-dropped are removed from the **Job Ticket Reference** panel.
- 5. In the Category panel, click the Layout Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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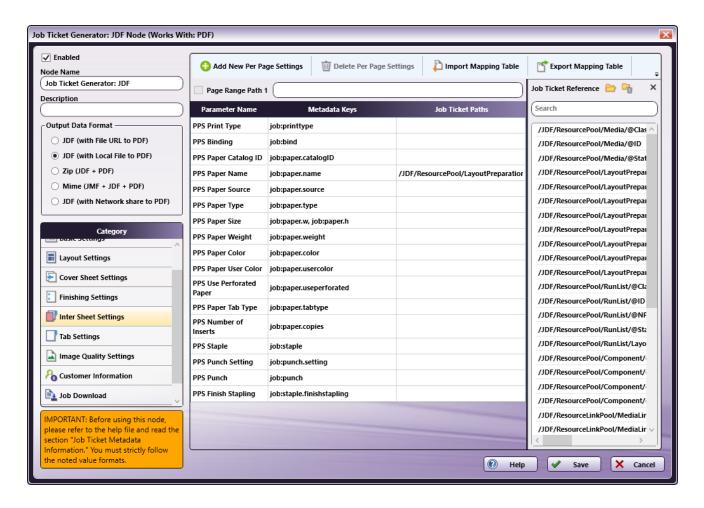
- 6. The following value from the Job Ticket Reference panel is automatically moved to its Job Tickets Paths cell:
 - /JDF/ResourcePool/LayoutPreparationParams/@Sides -> Printing Type
- 7. If they are not automatically mapped:
 - Drag-and-drop /JDF/ResourcePool/LayoutPreparationParams/@Sides to the Job Ticket Paths cell of the Printing Type row.
- 8. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 9. Repeat the same procedure for other **Category** options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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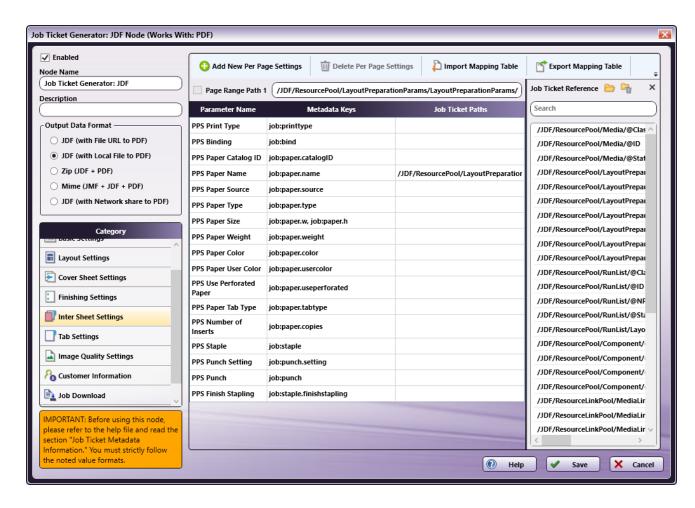


2. From the **Job Ticket Reference** panel, drag-and-drop /JDF/ResourcePool/LayoutPreparationParams/LayoutPreparationParams/@RunIndex to the **Page Range Path 1** text box.

Note: Page Range Path value should start with "/JDF/" pattern.

- 3. From the **Job Ticket Reference** panel, drag-and-drop /JDF/ResourcePool/LayoutPreparationParams/LayoutPreparationParams/Media/@DescriptiveName to the **Job Ticket Paths** field for **PPS Paper Name**.
- 4. Once these actions are completed, the screen will appear as shown in the following image:

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- 5. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 6. Repeat the same procedure for other ${\bf Category}$ options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Three values are supported: **Retrieve from Local Path**, **Download from URL** and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample JDF Job Ticket Files

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- "File": "file"
- "URL": "C:\Temp\Testfile.pdf"

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- "File": "http"
- "URL": "http://10.146.171.98/testapp8/Testfile.pdf"

Note: The file type keyword "http" and the file type keyword written in the input job ticket file must match.

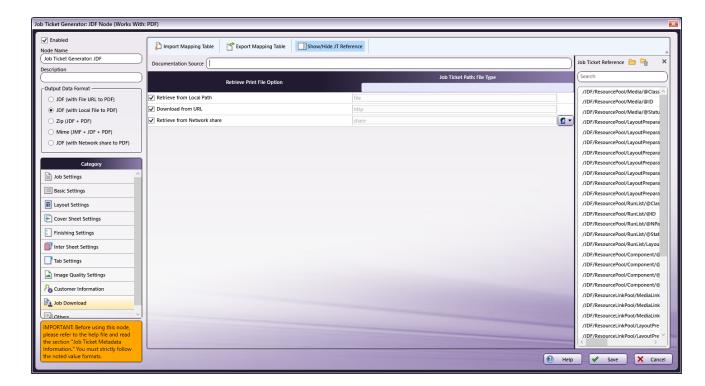
Retrieve from Network share

- "File": "share"
- "Src": "\\11.12.13.14\Temp\Testfile.pdf

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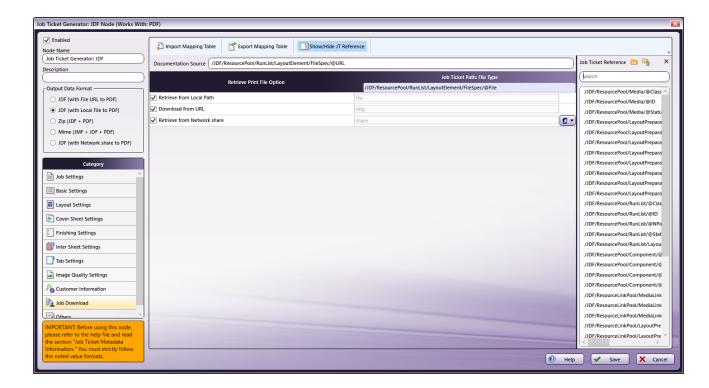
Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- In the Retrieve from File Option column, select the checkboxes of 3 options: Retrieve from Local Path, Download from URL and Retrieve from Network share.
- 3. From the **Job Ticket Reference** panel, drag-and-drop /JDF/ResourcePool/RunList/LayoutElement/FileSpec/@URL to the **Documentation Source** field.
- From the Job Ticket Reference panel, drag-and-drop /JDF/ResourcePool/RunList/LayoutElement/FileSpec/@File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

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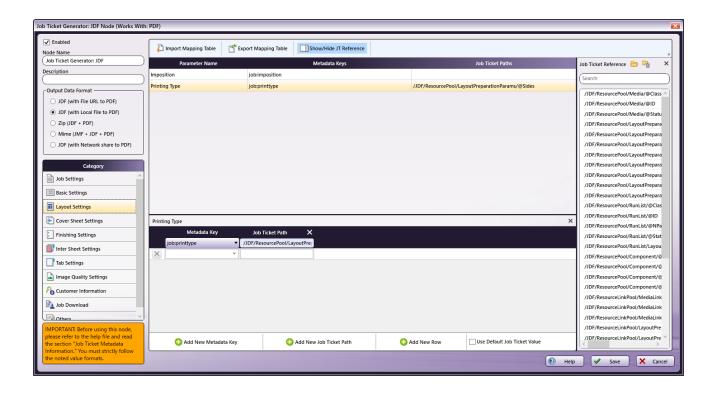
- 6. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 7. Repeat the same procedure for other **Category** options, as required.

Value Map Configuration

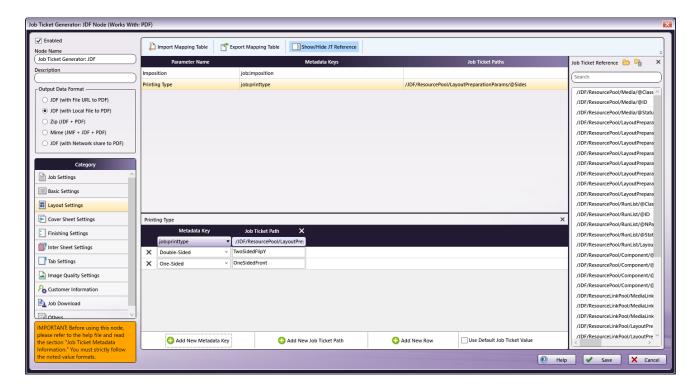
Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for /JDF/ResourcePool/LayoutPreparationParams/@Sides.

- 1. In the Category panel, click the Layout Settings option.
- 2. Click on the **Printing Type** row to open the **Value Map** panel:

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3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map row:



- 4. In the first row, select Double-Sided from the Metadata Key drop-down menu and enter TwoSidedFlipY for the Job Ticket Path.
- 5. If the metadata's value is **Double-Sided**, the job ticket will write the value as **TwoSidedFlipY**.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter OneSidedFront for the Job ticket path.
- 7. If the metadata's value is One-Sided, the job ticket will write the value as @Sides as OneSidedFront.
- 8. When finished, click **Save**. To undo the changes, click **Cancel**.

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Sample of a Job Ticket Generator: JDF Node Workflow



In the workflow above a job ticket file (e.g., jdf_sample_jobticket_file.jdf) is moved to the Input Folder. This is sent to the Job Ticket Parser: JDF Node where the JDF job ticket is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: JDF Node's settings. When this is completed, the data is transferred to the Job Ticket Editor Node where the Copies value is changed to 100. From there, the job moves to the Job Ticket Generator: JDF Node where a JDF job ticket file is generated from the metadata. Depending upon the Output Format specified, the converted file is then sent to an Output folder.

Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: JDF Node.

Job Ticket Parser: JDF Node: The Job Ticket Parser: JDF Node is used to parse the information in a JDF file then write the parsed information as metadata. The JDF file should contain a job ticket field and a job ticket value. The node reads the job ticket field and its corresponding job ticket values then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

The input will be a JDF, Zip (JDF+PDF), or MIME (MJM) file. The JDF and ZIP (JDF+PDF) contain the job ticket information in form of job ticket field and job ticket value. The MJM file contains the JMF, JDF content (job ticket), and PDF content and it will process the extracted JDF (job ticket) and PDF file.

For complete details, see the Job Ticket Parser: JDF Node topic in this Help file.

Job Ticket Editor Node: Use this node to modify the Copy count of the job:

1. Double-click the ${\bf Job\ Ticket\ Editor}$ node to view the settings:



- 2. From the left panel, select Basic Settings.
- 3. Click on **Copies** and drag it to the right-side panel:

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- 4. Change the Metadata Values to 100.
- 5. From the If metadata already exists drop-down, select Replace.



6. Click $\bf Save$ to apply the change.

Job Ticket Generator: JDF Node: The purpose and instructions for setting up this node are provided in the discussion that precedes this section.

Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<JDF xmlns="http://www.CIP4.org/JDFSchema 1 1" xmlns:kmbs="http://www.konicaminolta.com/KMBS JDI</pre>
```

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<JDF xmlns="http://www.CIP4.org/JDFSchema_1_1" xmlns:kmbs="http://www.konicaminolta.com/KMBS_JDFExtension_1_1" xmlns:xsi="http://www.w3.org/2001
<ResourcePool>

```
<Media Class="Consumable" ID="r170711_024318593_005119" MediaColorName="Yellow" Status="Available">
       <Location LocationName="AutoSelect"/>
    </Media>
    <LayoutPreparationParams Class="Parameter" ID="r170711_023611281_005743" PartIDKeys="RunIndex" Sides="TwoSidedFlipY" Status="Available">
        <LayoutPreparationParams RunIndex="0~4" kmbs:PerPageSet="Yes">
            <Media DescriptiveName="test"/>
        </LayoutPreparationParams>
    </LayoutPreparationParams>
    <RunList Class="Parameter" ID="r170707_053618136_000949" NPage="4" Status="Available">
            <FileSpec File="file" URL="C:\ProgramData\Konica Minolta\conopsd\var\blox\node_4\tmp.d\Testfile.pdf"/>
        </LavoutElement>
    </RunList>
    <Component Class="Quantity" ComponentType="FinalProduct" ID="r170711_024318596_005125" Status="Unavailable"/>
<ResourceLinkPool>
    <MediaLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_024318593_005119"/>
    <LayoutPreparationParamsLink CombinedProcessIndex="0" Usage="Input" rRef="r170711_023611281_005743"/>
    <RunListLink CombinedProcessIndex="0 1" ProcessUsage="Document" Usage="Input" rRef="r170707_053618136_000949"/>
    <ComponentLink Amount="100" CombinedProcessIndex="4" Usage="Output" rRef="r170711_024318596_005125"/>
</ResourceLinkPool>
<CustomerInfo BillingCode="" CustomerID="" CustomerJobName="JDF job"/>
```

Job Ticket Generator: JSON



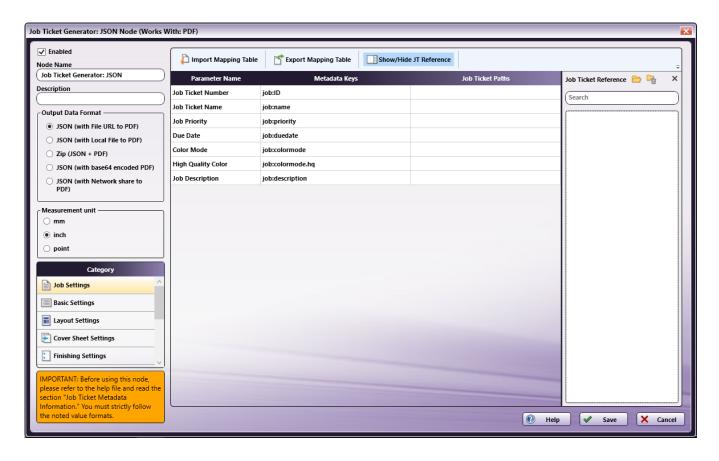
Note: This node works with PDF files (version 1.3 or later).

Use the **Job Ticket Generator: JSON Node** to create or update a file with the corresponding metadata values of Dispatcher by using a Mapping Table file. If the JSON file path exists, the existing JSON file is updated with the corresponding metadata. If the JSON file path does not exist, the Job Ticket Generator: JSON Node will create a new JSON file, and then update it with the corresponding metadata values.

Using the Job Ticket Generator: JSON Node

Add the Job Ticket Generator: JSON Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Generator: JSON Node:

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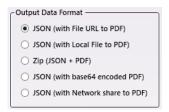


Use this window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Job Ticket Parser: JSON Node.
- In the **Description** field, enter a description for the Job Ticket Parser: JSON Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Output Data Format

In the Output Data Format area, select the node output format:



The following options are supported:

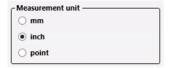
- JSON (with File URL to PDF): A local PDF's URL is included in the generated job ticket's JSON file.
- JSON (with Local File to PDF): A local PDF file path is included in the generated job ticket's JSON file.
- **ZIP (JSON+PDF):** The node generates a JSON and a PDF file.
- JSON (with base 64 encoded PDF): The output is base64 encoded PDF data in a JSON file.

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• JSON (with Network share to PDF): Network shared PDF file path is included in the generated job ticket's JSON file.

Measurement Unit

Use this option to specify measurement unit.



There are three options:

- mm
- inch
- point

Note: By default, inch displays for all English locale systems. All other locales default to mm. Regardless of the default value, the user may change to any of the available three values.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, Paper Unit, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- Finishing Settings: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.
- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's

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Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.

- Job Download: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the **Others** Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:



- · Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

In this panel user defines the mapping values between the job ticket parameters and the Dispatcher Metadata. It consists of three columns.

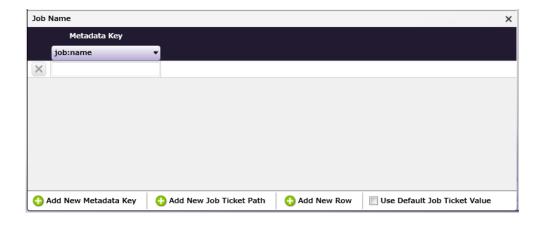
Parameter Name	Metadata Keys	Job Ticket Paths
Job Ticket Number	job:ID	
Job Name	job:name	
Priority	job:priority	
Job Due Date	job:duedate	
Color Mode	job:colormode	
High Quality Color Mode	job:colormode.hq	
Job Description	job:description	

- $\bullet \ \ \textbf{Parameter Name} : \textbf{This column notes user-friendly names for the job ticket parameters}.$
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the JSON Path that corresponds to each job ticket parameter.

Value Map Panel

Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.

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- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- · Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel



To open a sample job ticket file, click the **Open** button (<u>></u>). Once a job ticket is selected, all possible JSON Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of the Mapping Table

Job Ticket File

The Job Ticket Generator: JSON Node is used to convert metadata to a JSON job ticket file.

Note: Once the Job Ticket Generator: JSON Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

\Program Files\Common Files\Konica Minolta\Phoenix\Resources\JobTicketGeneratorJSONNode

The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

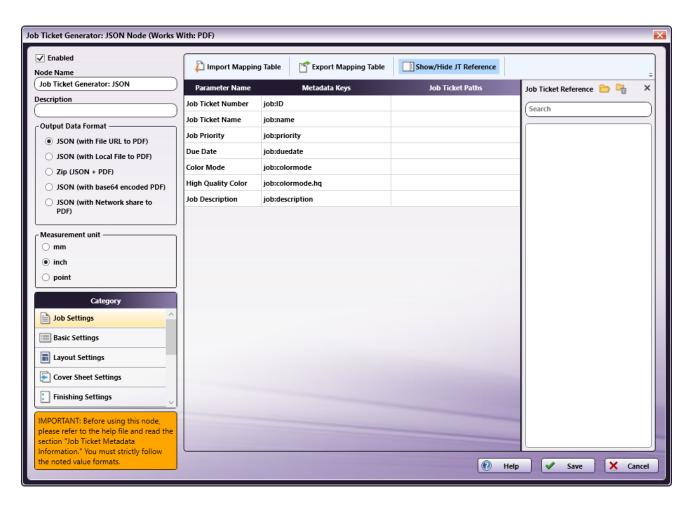
The Job Ticket Generator: JSON Node defines job ticket parameters using Document and Per Page Settings level values. For the discussion that follows, a sample job ticket is modified with simple Document and Per Page Settings level values. This sample job ticket is used for the discussion that follows:

```
"Ticket": {
  "Name": "Sample JSON Job",
  "Quantity": 5,
  "Duplex": "On",
  "Media": {
      "Color": "Yellow"
},
  "File": "file",
```

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Configure the Mapping Table Using the Job Ticket File

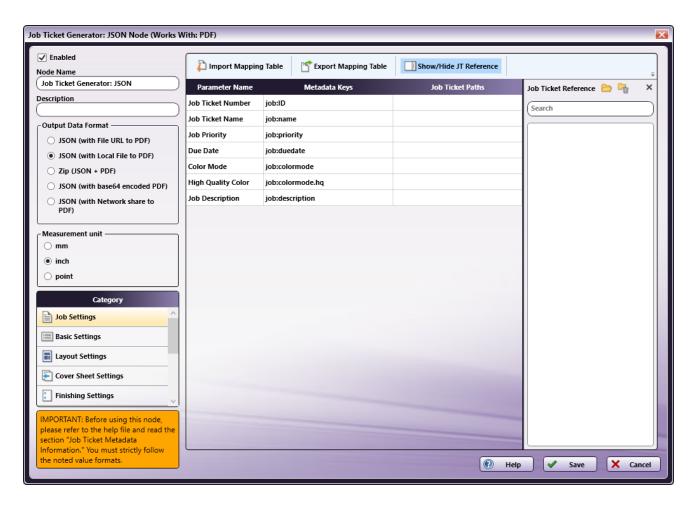
- 1. Using a text editor, copy the sample JSON file above.
- 2. The **Source Path ("Src")** element noted in the sample job ticket (as explained in the example above), needs to be changed so that the path is valid.
- 3. Save the sample locally as <code>json_sample_jobticket_file.json</code>.
- 4. Double-click on the Job Ticket Generator: JSON node. The settings screen opens:



- 5. In the left panel, set the following values:
 - **Enabled** checkbox: Select the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
 - Output Data format: Select the JSON (with Local File to PDF) radio button.
 - **Measurement unit**: Select a radio button.

Note: If the metadata value_{job:paper.unit}_is included in the input Job Ticket, that value will overwrite any value selected in the **Measurement Unit** field.

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6. In the **Job Ticket Reference** pane (far-right), locate the **Open** icon:



7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above (json_sample_jobticket_file.json).



8. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel, as noted in the following image:

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Note: When a job ticket is loaded, it needs to be mapped by dragging-and-dropping the correct values from the **Job Ticket reference** panel. If a value DOES NOT appear in the **Job Ticket Reference** panel, manually enter the value noted in the instructions in this Help file.

Mapping XPaths

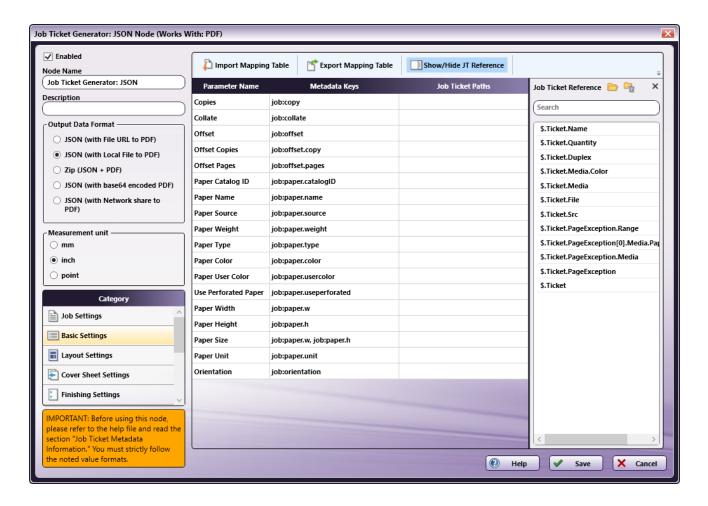
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

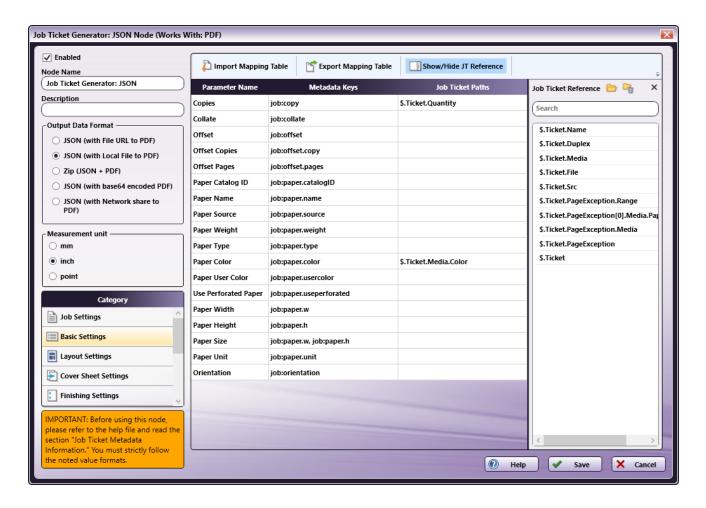
1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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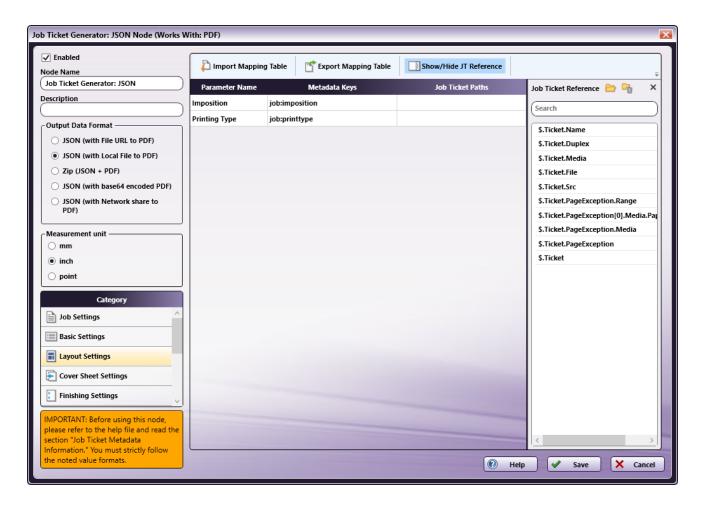
- 2. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 3. Drag-and-drop \$.Ticket.Quantity to the Job Ticket Paths cell of the Copies row. Drag-and-drop \$.Ticket.Media.Color to the Job Ticket Paths cell of the Paper Color row.
- 4. The values that were dragged-and-dropped are removed from the **Job Ticket Reference** panel:

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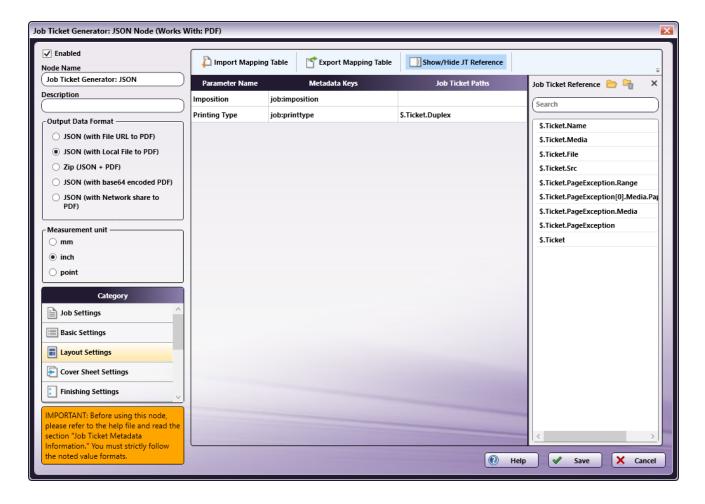
5. In the Category panel, click the Layout Settings option. The Parameter Name/Metadata Keys, and Job Ticket Paths fields display in the main panel:

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- 6. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 7. Drag-and-drop **\$.Ticket.Duplex** to the **Job Ticket Paths** cell of the **Printing Type** row.

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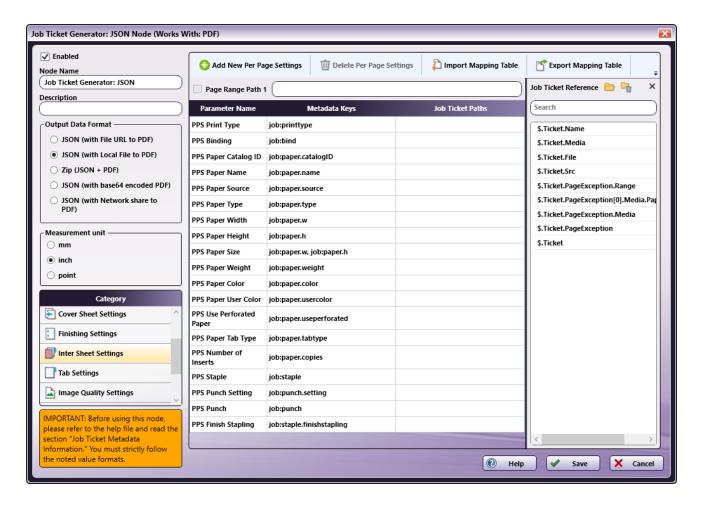
- 8. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 9. Repeat the same procedure for other ${\bf Category}$ options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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2. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.PageException.Range to the Page Range Path 1 text box.

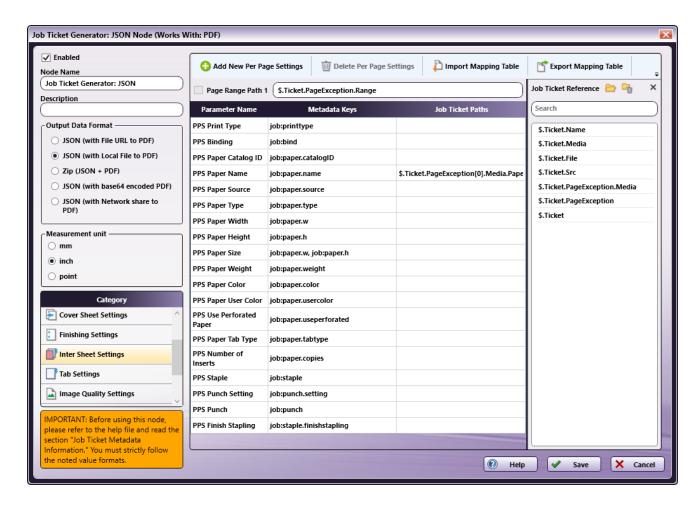
Note: Page Range Path value should start with "\$." pattern.

3. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.PageException[0].Media.PaperName to the Job Ticket Paths cell of the PPS Paper Name row.

Note: Change PageException[0] to PageException.

 $4. \ \, \text{Once these actions are completed, the screen will appear as shown in the following image:}$

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- 5. All values that were dragged-and-dropped from the Job Ticket Reference panel are removed from the panel.
- 6. Repeat the same procedure for other ${\bf Category}$ options, as required.

Mapping Job Download Parameter Name/Metadata Key Values

Use the **Job Download Category** to enable the input source from which a job's PDF file can be received. Four values are supported: **Retrieve from Local Path**, **Download from URL**, **Retrieve Encoded base64 from Job Ticket** (the PDF data in the form of embedded base64 code), and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample JSON Job Ticket Files

The following examples show how the code will display the PDF file for each of the job download options:

Retrieve from Local Path

- "File": "file"
- "Src": "C:\Temp\Testfile.pdf"

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- "File": "http"
- "Src": "http://10.146.171.98/testapp8/sample.pdf

Note: The file type keyword "http" and the file type keyword written in the input job ticket file must match.

Retrieve Encoded base64 from Job Ticket

• "File": "base64"

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• "Src": "xxddqdfexdqfqnqn..."

Note: The file type keyword "base64" and the file type keyword written in the input job ticket file must match.

Retrieve from Network share

- "File": "share"
- "Src": "\\11.12.13.14\Temp\Testfile.pdf"

Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

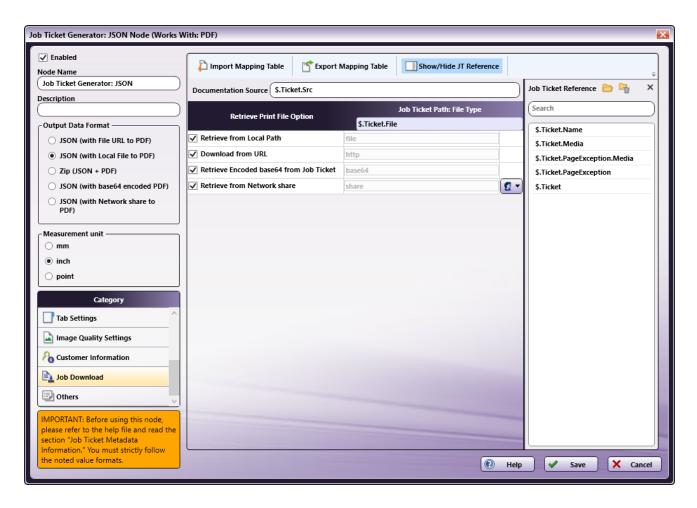
Based on the UI output data format selection, File and Src values are updated in the generated JSON job ticket file as noted above.

1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- 2. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket and Retrieve from Network share.
- 3. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.Src to the Documentation Source field.
- 4. From the Job Ticket Reference panel, drag-and-drop \$.Ticket.File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

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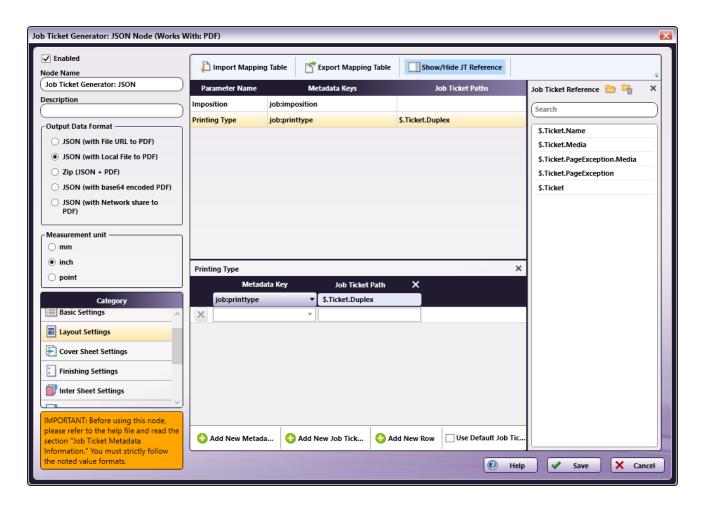
- 6. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 7. Repeat the same procedure for other ${\bf Category}$ options, as required.

Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **Duplex**.

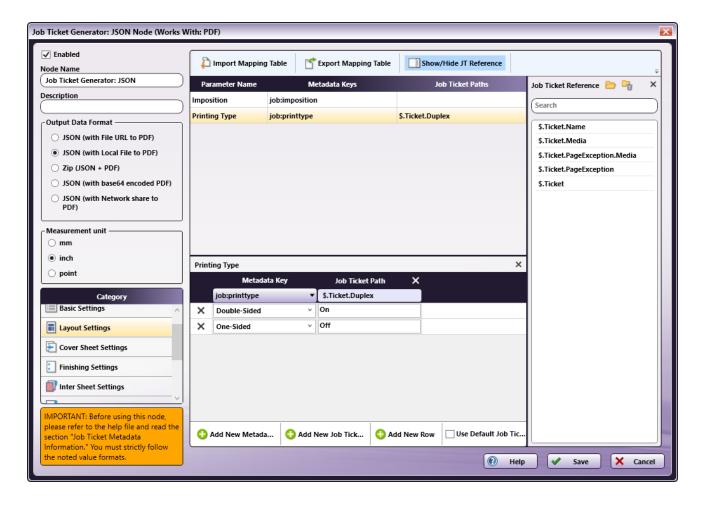
- 1. In the Category panel, click the Layout Settings option.
- 2. Click on the **Printing Type** row to open the **Value Map** panel:

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3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add a second value map row:

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- 4. In the first row, select **Double-Sided** from the **Metadata Key** drop-down menu and enter On for the **Job Ticket Path**.
- 5. If a job is sent to a node that has a **Duplex On** value and **Double-Sided** printing is selected, then **Double-Sided** printing is output in the metadata.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter Off for the Job Ticket Path.
- 7. If a job is sent to a node that has a Duplex Off value and One-Sided printing is selected, then One-Sided printing is output in the metadata.
- 8. When finished, click Save. To undo the changes, click Cancel.

Sample of a Job Ticket Generator: JSON Node Workflow



In the workflow above, a job ticket file (e.g., json_sample_jobticket_file.json) is moved to the Input Folder. This is sent to the Job Ticket Parser: JSON node where the JSON job ticket is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: JSON Node's settings. When this is completed, the data is transferred to the Job Ticket Editor Node where the **Copies** value is changed to 100. From there, the job moves to the Job Ticket Generator: JSON Node where a JSON job ticket file is generated from the metadata. Depending upon the Output Format specified, the converted file is then sent to an Output folder.

Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: JSON Node.

Job Ticket Parser: JSON Node is used to parse the information in a JSON file, and then write the parsed information as metadata. The JSON file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

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The PDF file location is noted in the JSON file's URL field and the PDF file is downloaded to the node using that information. If the input file is a ZIP file (JSON + PDF) then the file is unzipped, and then the JSON file is processed.

For complete details, see the **Job Ticket Parser: JSON Node** topic in this Help file.

Job Ticket Editor Node: Use this node to modify the **Copy** count of the job:

1. Double-click the **Job Ticket Editor** node to view the settings:



- 2. From the left panel, select Basic Settings.
- 3. Click on **Copies** and drag it to the right-side panel:



- 4. Change the Metadata Values to 100.
- 5. From the If metadata already exists drop-down, select Replace

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6. Click Save to apply the change.

Job Ticket Generator: JSON Node: The purpose and instructions for setting up this node are provided in the discussion that precedes this section.

Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
{
  "Ticket" : {
    "Name" : "Sample JSON Job",
    "Quantity" : 100,
    "Duplex" : "On",
    "Media" : {
        "Color" : "Yellow"
    },
    "File" : "file",
    "Src" : "C:\ProgramData\Konica Minolta\conopsd\var\blox\node_4\tmp.d\Testfile.pdf ",
    "PageException" : [
        {
            "Range" : "1-5",
            "Media" : {
            "PaperName" : "A4"
        }
     }
     }
}
```

Job Ticket Generator: XML



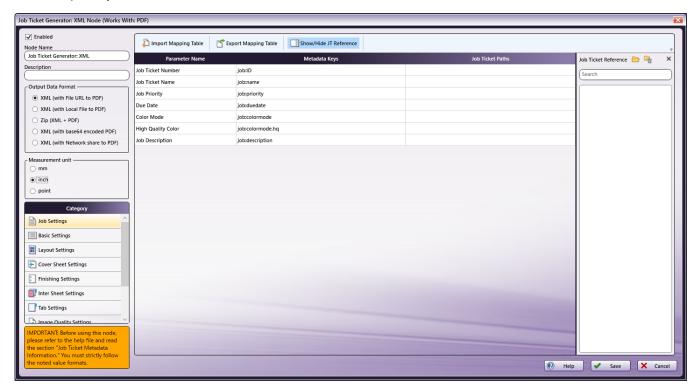
Note: This node works with PDF files (version 1.3 or later).

Use the **Job Ticket Generator: XML Node** to create or update an XML file with the corresponding metadata values of Dispatcher by using a Mapping Table file. If the file path exists, the existing XML file is updated with the corresponding metadata. If the XML file path doesn't exist in the metadata, Job Ticket Generator: XML Node will create a new XML file, and then update it with the corresponding metadata values

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Using the Job Ticket Generator: XML Node

Add the Job Ticket Generator: XML Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Job Ticket Generator: XML Node:

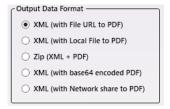


Use this window to create or import a mapping table by using a dependent UI component mapping table editor.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Job Ticket Parser: XML Node.
- In the **Description** field, enter a description for the Job Ticket Parser: XML Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

Output Data Format

In the Output Data Format area, select the node output format:



The following options are supported:

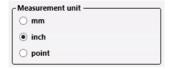
- XML (with File URL to PDF): A local PDF's URL is included in the generated job ticket's XML file.
- XML (with Local File to PDF): A local PDF file path is included in the generated job ticket's XML file.
- **ZIP (XML+PDF):** The node generates an XML and a PDF file.

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- XML (with base 64 encoded PDF): The output is base64 encoded PDF data in an XML file.
- XML (with Network share to PDF): Network shared PDF file path is included in the generated job ticket's XML file.

Measurement Unit

Use this option to specify measurement unit.



There are three options:

- mm
- inch
- · point

Note: By default, inch displays for all English locale systems. All other locales default to mm. Regardless of the default value, the user may change to any of the available three values.

Category Panel

There are eleven job ticket parameter Categories (all noted in the image below). To display the setting values of a Category, click one of the eleven options:



- Job Settings: Select this option to edit the job ticket parameters of the following values: Job Ticket Number, Job Ticket Name, Job Priority, Due Date, Color Mode, High Quality Color, or Job Description.
- Basic Settings: Select Basic Settings to edit the job ticket parameter of Copies, Collate, Offset, Offset Copies, Offset Pages, Paper Catalog ID, Paper Name, Paper Source, Paper Weight, Paper Type, Paper Color, Paper User Color, Use Perforated Paper, Paper Size, Paper Unit, or Orientation.
- Layout Settings: Select this option to edit the job ticket parameters of the following values: Imposition, or Printing Type.
- Cover Sheet Settings: Select this option to edit the job ticket parameters of the following values: Front Cover, Front Cover Paper Name, Back Cover, or Back Cover Paper Name.
- Finishing Settings: Select Finishing Settings to edit the job ticket parameter of Binding Position, Saddle Stitch, Trim, Staple, Punch, Folding, Perfect Binding, Perfect Binding Mode, Perfect Binding Tray, Perfect Binding Duplex, Perfect Binding Spine, Perfect Binding Cover Size, Perfect Binding Cover Weight, Ring Binding, Ring Binding Front Cover, or Ring Binding Back Cover.
- Inter Sheet Settings: Select Inter Sheet Settings to edit the job ticket parameter of PPS Print Type, PPS Binding, PPS Paper Catalog ID, PPS Paper Name, PPS Paper Source, PPS Paper Type, PPS, PPS Paper Size, PPS Paper Weight, PPS Paper Color, PPS Paper User Color, PPS Use Perforated Paper, PPS Paper Tab Type, PPS Number of Inserts, PPS Staple, PPS Punch Setting, PPS Punch, or PPS Finish Stapling.
- Tab Settings: Select Tab Paper Size, Tab Paper Weight, Tab Text, Tab Sheet Page Number, File Order, or Number of Tabs.
- Image Quality Settings: Select this option to edit the job ticket parameters of the following value: Resolution.

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- Customer Information: Select this option to edit the job ticket parameters of the following values: Comment URL, Customer's First Name, Customer's Last Name, Customer's Address 1, Customer's Address 2, Customer's City, Customer's State, Customer's Zip Code, Customer's Country, Customer's Company, Customer's Phone, Customer's Fax, Customer's Email, or Job Created By.
- Job Download: Select this option to specify which Print File Option will be used to retrieve a print file: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket or Retrieve from Network share.
- Others: Select this option to if a job contains a custom job ticket parameter that cannot be found in any of categories. Add a new field for this option using the Others Category.

Tool Bar

The Tool Bar only appears when the **Inter Sheet Settings** and the **Others** Category options are selected. The example below displays when the Others Category option is selected. The Inter Sheet Settings Tool Bar varies from this example. All available Tool Bar options are noted below:



- Add New: Use this option to add a new entry parameter and define its conversion rule. This is only available in the Others category.
- Delete: Use this option to delete a parameter entry. This is only available in the Others category.
- Add New Per Page Settings: Use this option to add another set of Per Page Settings. This is only available in the Inter Sheet Settings
 category.
- Delete Per Page Settings: Use this option to delete a Per Page settings entry. This is only available in the Inter Sheet Settings category.
- Import Mapping Table: Click to open a file dialog then select a mapping table xml file to import.
- Export Mapping Table: Use this function to save any configuration changes applied to the external mapping table's xml file.
- Show/Hide JT Reference: Use this option to show or hide the Job Ticket Reference Panel.

Mapping Table Panel

In this panel user defines the mapping values between the job ticket parameters and the **Dispatcher Metadata.** It consists of three columns.

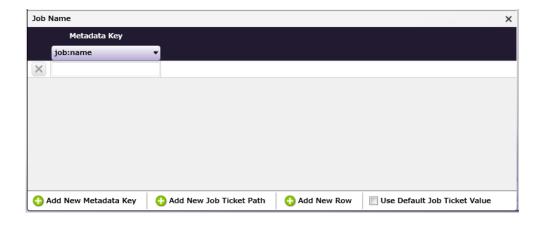
Parameter Name	Metadata Keys	Job Ticket Paths
Job Ticket Number	job:ID	
Job Name	job:name	
Priority	job:priority	
Job Due Date	job:duedate	
Color Mode	job:colormode	
High Quality Color Mode	job:colormode.hq	
Job Description	job:description	

- Parameter Name: This column notes user-friendly names for the job ticket parameters.
- Metadata Key: This column notes the Dispatcher Metadata Keys for each parameter name.
- Job Ticket Paths: This column is initially blank. In it, enter the XML Path that corresponds to each job ticket parameter.

Value Map Panel

Click on the table above to display the Metadata Key panel. Use this panel to define the conversion rules between the **Metadata** and **Job Ticket** values. Enter the values into the table. **Metadata Key(s)** and **Job Ticket Path(s)** are listed in a header. Entries may be added or deleted, as required.

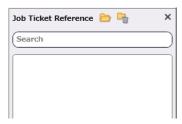
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- Add New Metadata Key: Click this button to add a new Metadata Key.
- Add New Job Ticket Path: Click this button to add a new Job Ticket Path.
- · Add New Row: Click this button to add a new value map Row.
- Use default Job Ticket Value: If this is enabled, values in the Job Ticket remain with their corresponding Metadata Keys and are saved without any conversion being applied.

Note: The check box is only available in the case of 1-to-1 mapping. In all other conditions, this option is grayed out and cannot be enabled.

Job Ticket Reference Panel



To open a sample job ticket file, click the **Open** button (<u>C</u>). Once a job ticket is selected, all possible XML Paths are listed in the table. Drag-and-drop items in the list to the desired **Job Ticket Paths** column in the **Mapping Table Panel**.

Click the **Clear** button () to clean up the list.

Basic Operations of Mapping Table

Job Ticket File

The Job Ticket Generator: XML Node is used to convert metadata to an XML job ticket file.

Note: Once the Job Ticket Generator: XML Node has been added to Dispatcher Phoenix via the add-in manager, sample job ticket files are available for viewing. Use the path below to locate them:

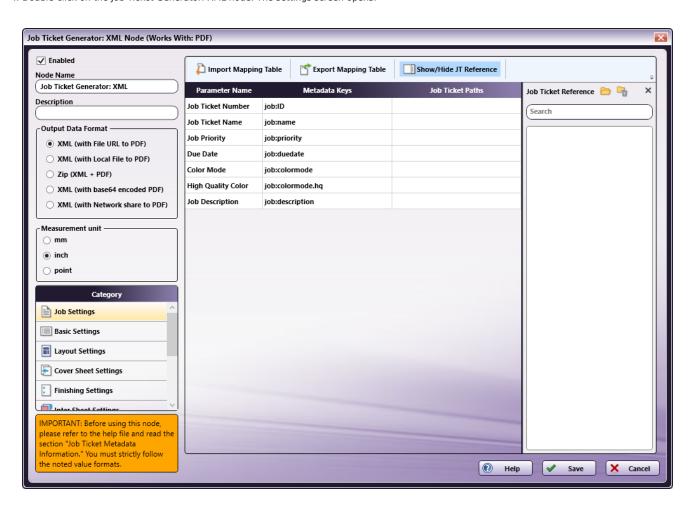
The sample job ticket noted above contains all possible job ticket parameters. The sample job ticket can be modified so it contains the parameters required to support a file. A job ticket file can also be generated using an external, third-party application. This job ticket file may then be used as a sample file.

The Job Ticket Generator: XML Node defines job ticket parameters using Document- and Per Page Set-tings-level values. For the discussion that follows, a sample job ticket is modified with simple Document-and Per Page Settings-level values. This sample job ticket is used for the discussion that follows:

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Configure the Mapping Table Using the Job Ticket File

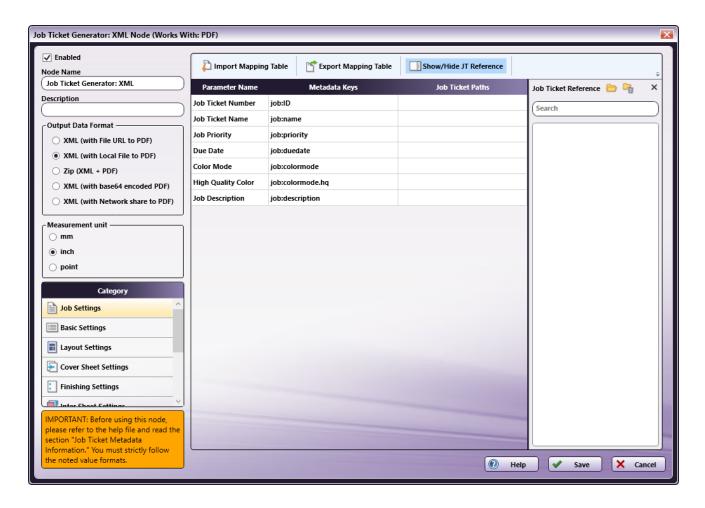
- 1. Using a text editor, copy the sample XML file above.
- 2. The **Source Path <Src>** element noted in the sample job ticket (as explained in the example above), needs to be changed so that the path is valid.
- 3. Save the file locally as xml_sample_jobticket_file.xml.
- 4. Double-click on the Job Ticket Generator: XML node. The settings screen opens:



- 5. In the left panel, set the following values:
 - **Enabled** checkbox: the checkbox so that the process will run.
 - Node Name: Assign a name value to the node in the text field.
 - Output Data format: Select the XML (with Local File to PDF) radio button.
 - Measurement unit: Select a radio button.

Note: If the metadata value_{job:paper.unit}_is included in the input Job Ticket, that value will overwrite any value selected in the **Measurement Unit** field.

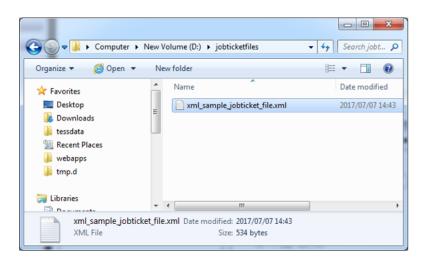
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6. In the ${\bf Job\ Ticket\ Reference}$ Panel (far-right), locate the ${\bf Open}$ icon:



7. Click the icon and on the screen that opens, navigate to and select the file saved in Step 3 above (xml_sample_jobticket_file.xml).



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8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel, as noted in the following image:



Mapping XPaths

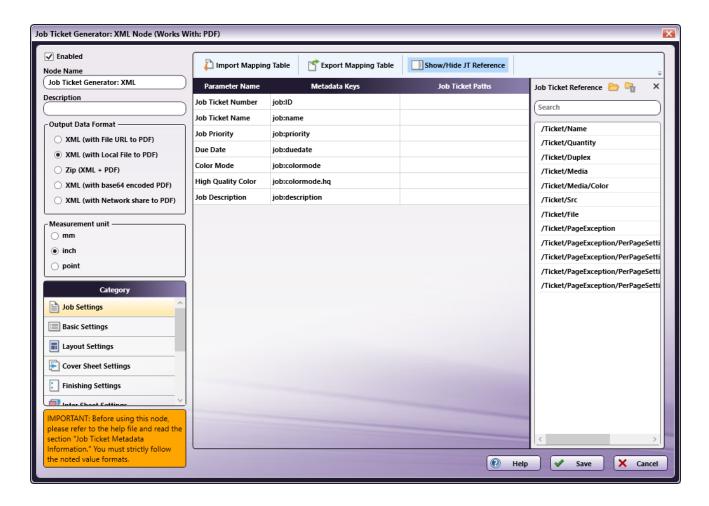
Once the XPath values are available, they need to be mapped to the **Parameter Name/Metadata Key** values in the main panel. Do this by clicking on a value in the **Job Ticket Reference** panel, and then dragging the value to the corresponding **Job Ticket Paths** cell in the main panel.

The **Category** panel is available to the left and contains several options. Click a category option. The **Parameter Name/Metadata Key** values it contains display in the main panel.

Mapping Basic Parameter Name/Metadata Keys Values

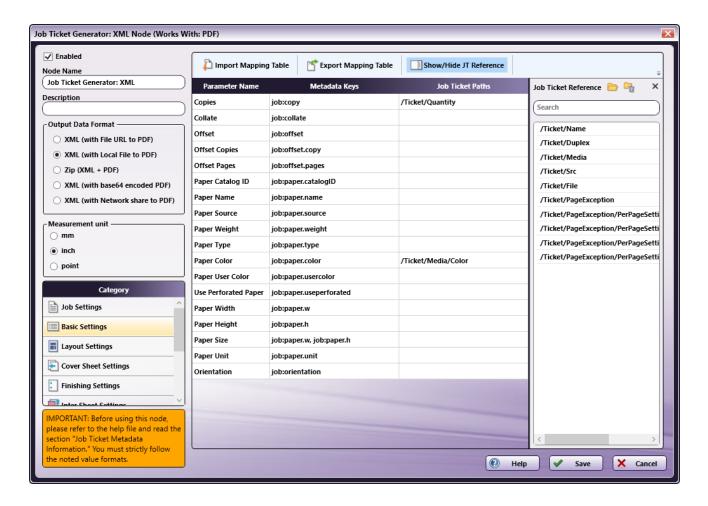
1. In the Category panel, click the Basic Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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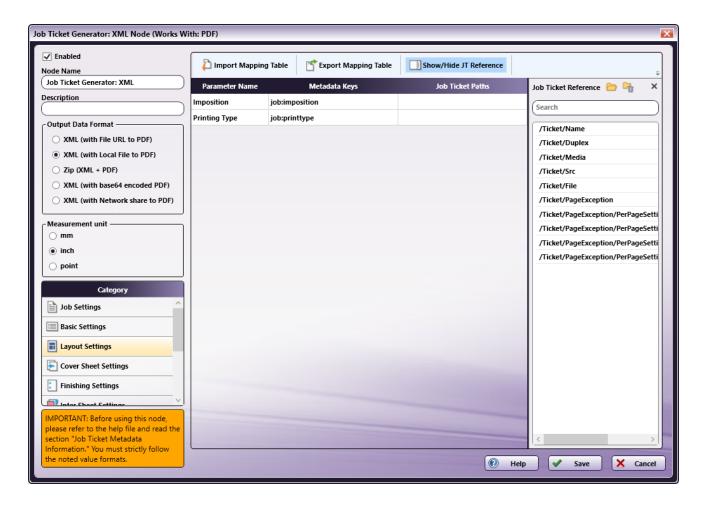
- 2. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 3. Drag-and-drop /Ticket/Quantity to the Job Ticket Paths cell of the Copies row. Drag-and-drop /Ticket/Media/Color to the Job Ticket Paths cell of the Paper Color row.
- 4. The values that were dragged-and-dropped are removed from the **Job Ticket Reference** panel:

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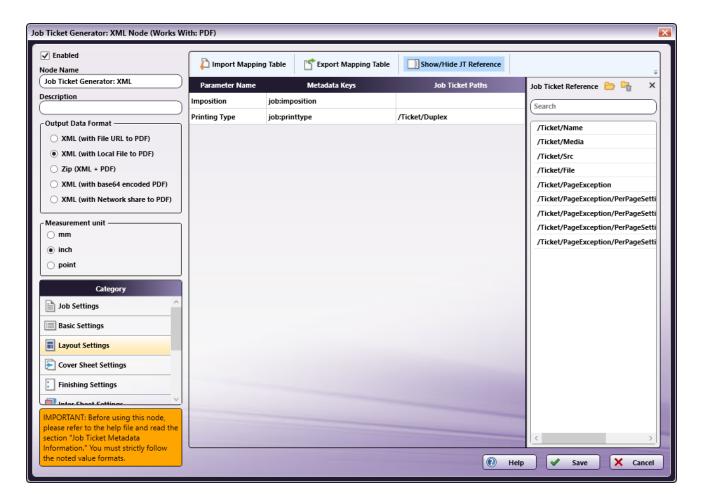
5. In the Category panel, click the Layout Settings option. The Parameter Name/Metadata Keys, and Job Ticket Paths fields display in the main panel:

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- 6. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 7. Drag-and-drop /Ticket/Duplex to the Job Ticket Paths cell of the Printing Type row.

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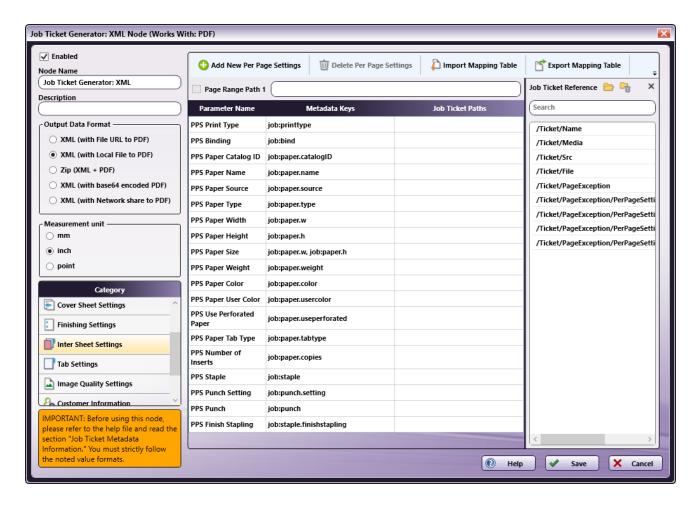
- 8. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 9. Repeat the same procedure for other ${\bf Category}$ options, as required.

Mapping Inter Sheet Settings Parameter Name/Metadata Keys Values

The Inter Sheet Settings Category is used to configure Per Page Settings. Enable and then map the XPath values to activate these settings. These Inter Sheet Settings generate page-level metadata.

1. In the Category panel, click the Inter Sheet Settings option. The Page Range Path 1 field and the Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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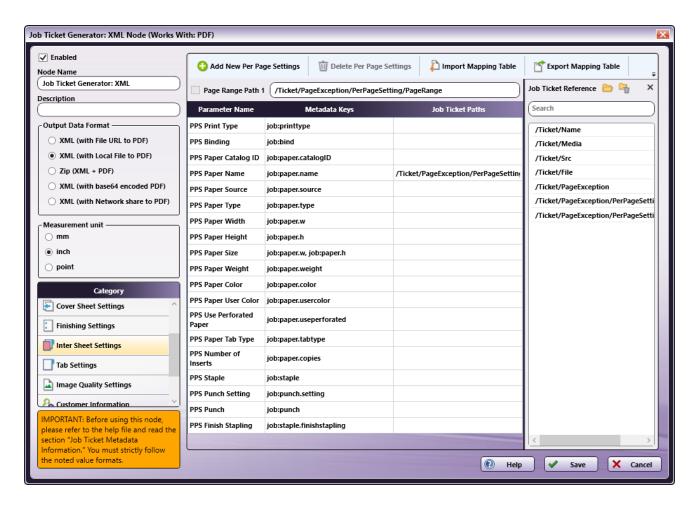


2. From the Job Ticket Reference panel, drag-and-drop /Ticket/PageException/Range to the Page Range Path 1 text box.

Note: Page Range Path value should start with "/Ticket/" pattern.

- 3. From the **Job Ticket Reference** panel, drag-and-drop /**Ticket/PageException/Media/PaperName** to the **Job Ticket Paths** cell of the **PPS Paper Name** row.
- 4. Once these actions are completed, the screen will appear as shown in the following image:

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- 5. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 6. Repeat the same procedure for other **Category** options, as required.

Mapping Job Download Parameter Name/Metadata Keys Values

The **Job Download Category** is used to enable the input sources from which a job's PDF file can be received. Four values are supported: **Retrieve from Local Path**, **Download from URL**, **Retrieve Encoded base64 from Job Ticket** (the PDF data in the form of embedded base64 code) and **Retrieve from Network share**.

Enable and then map the XPath values to activate these settings.

Sample XML Job Ticket Files

The following examples show how the code will display the PDF file for each of the job download options.

Retrieve from Local Path

- <Src>C:\Temp\Testfile.pdf</Src>
- <File>file</File>

Note: The file type keyword "file" and the file type keyword written in the input job ticket file must match.

Download from URL

- <Src>http://10.146.171.98/testapp8/Testfile.pdf</Src>
- <File>http</File>

Note: The file type keyword "http" and the file type keyword written in the input job ticket file must match.

Retrieve Encoded base64 from Job Ticket

<Src>xxddgdfexdgfgngn...</Src>

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• <File>base64</File>

Note: The file type keyword "base64" and the file type keyword written in the input job ticket file must match.

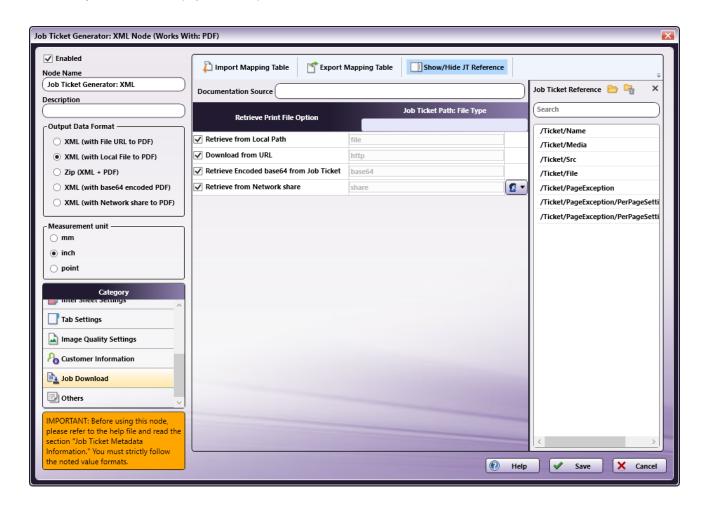
Retrieve from Network share

- <Src>\\11.12.13.14\Temp\Testfile.pdf</Src>
- <File>share</File>

Note: The file type keyword "share" and the file type keyword written in the input job ticket file must match.

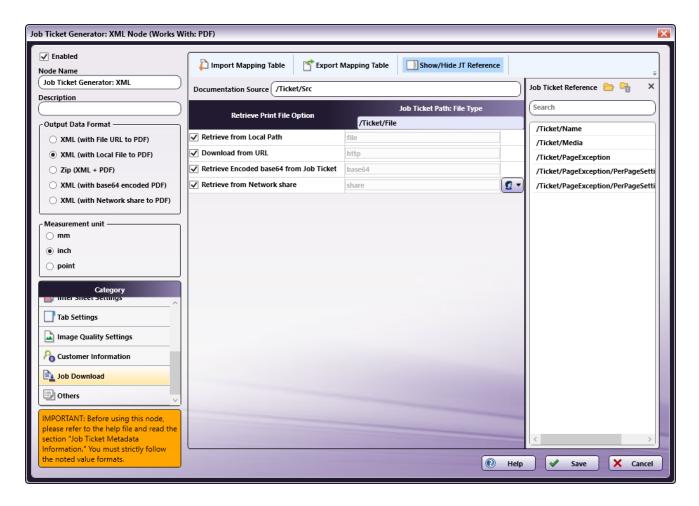
Based on the UI output data format selection, @File and @Src values are updated in the generated XML job ticket file as noted above.

1. In the Category panel, click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:



- In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket and Retrieve from Network share.
- ${\it 3. From the \textbf{Job Ticket Reference}\ panel,\ drag-and-drop\ \textbf{/Ticket/Src}\ to\ the\ \textbf{Documentation\ Source}\ field.}$
- 4. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 5. Once these actions are completed, the screen will appear as shown in the following image:

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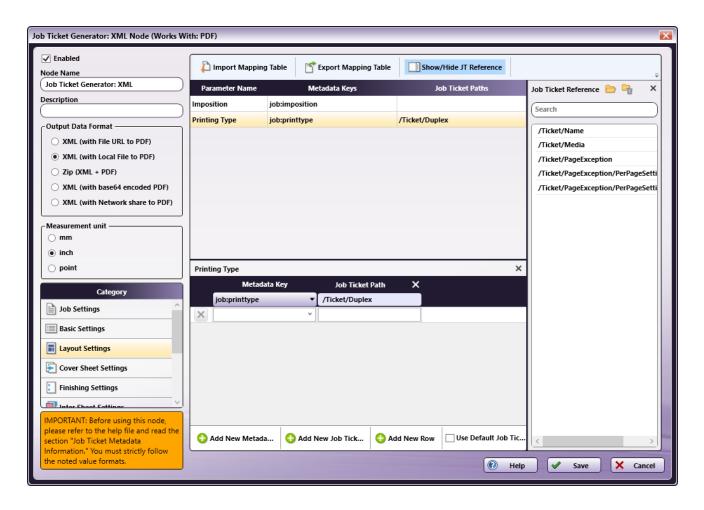
- 6. All values that were dragged-and-dropped from the **Job Ticket Reference** panel are removed from the panel.
- 7. Repeat the same procedure for other ${\bf Category}$ options, as required.

Value Map Configuration

Use this feature to configure one or more values for job ticket paths. In the example that follows, **Printing Type's** XPath value is mapped. Once that is completed, the setting is then edited to specify the value map for **Duplex**.

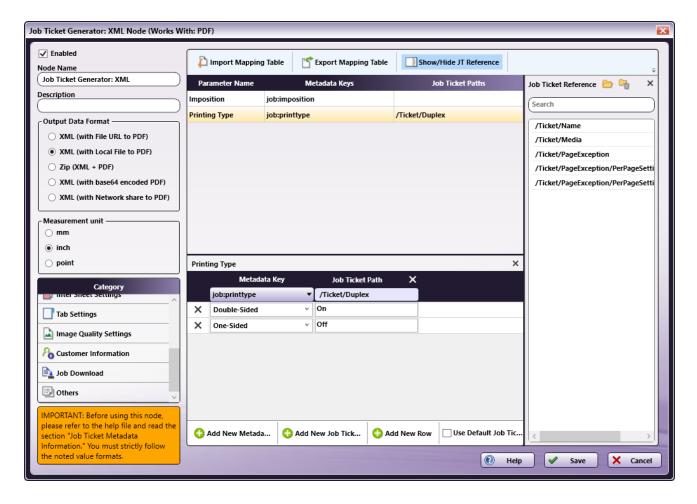
- 1. In the Category panel, click the Layout Settings option.
- 2. Click on the **Printing Type** row to open the **Value Map** panel:

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3. By default, a single value map row displays. Since there are two values that need to be mapped, click **Add New Row** to add the second value map row:

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- 4. In the first row, select **Double-Sided** from the **Metadata Key** drop-down menu and enter **On** for the **Job Ticket Path**.
- If a job is sent to a node that has a Duplex On value and Double-Sided printing is selected, then Double-Sided printing is output in the metadata.
- 6. In the second row, select One-Sided from the Metadata Key drop-down menu and enter Off for the Job Ticket Path.
- 7. If a job is sent to a node that has a Duplex Off value and One-Sided printing is selected, then One-Sided printing is output in the metadata.
- 8. When finished, click Save. To undo the changes, click Cancel.

Sample of a Job Ticket Generator: XML Node Workflow



In the workflow above a job ticket file (e.g., xml_sample_jobticket_file.xml) is moved to the Input Folder. This is sent to the Job Ticket Parser: XML node where the XML job ticket is converted to job ticket metadata using the mapped values that have been created using the Job Ticket Parser: XML Node's set-tings. When this is completed, the data is transferred to the Job Ticket Editor Node where the Copies value is changed to 100. From there, the job moves to the Job Ticket Generator: XML Node where an XML job ticket file is generated from the metadata. Depending upon the Output Format specified, the converted file is then sent to an Output folder.

Input Folder Node: Configure the Input Folder to collect files and forward them to the Job Ticket Parser: XML Node.

Job Ticket Parser: XML Node: The Job Ticket Parser: XML Node is used to parse the information in a XML file then write the parsed information as metadata. The XML file should contain a job ticket field and a job ticket value field. The node reads the job ticket field and its corresponding job ticket values, and then updates the metadata. A mapping table is used to map the job ticket data to the metadata values.

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The PDF file location is noted in the XML file's URL field and the PDF file is downloaded to the node using that information. If input file is a ZIP file (XML + PDF) then the file is unzipped, and then the XML file is processed.

For complete details, see the **Job Ticket Parser: XML Node** topic in this Help file.

Job Ticket Editor Node: Use this node to modify the Copy count of the job:

1. Double-click the **Job Ticket Editor** node to view the settings:



- 2. From the left panel, select Basic Settings.
- 3. Click on **Copies** and drag it to the right-side panel:



- 4. Change the Metadata Values to 100.
- 5. From the If metadata already exists drop-down, select Replace.

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6. Click **Save** to apply the change.

Job Ticket Generator: XML Node: The purpose and instructions for setting up this node are provided in the discussion that precedes this section.

Output Folder Node: Once all workflow processes have been successfully applied, a job is routed to the folder path configured in the Output Folder Node.

The output metadata that follows is based upon the settings noted in the previous sections of this document:

```
<Name>Sample XML Job</Name>
    <Quantity>100</Quantity>
    <Duplex>On</Duplex>
    <Media>
        <Color>Yellow</Color>
    <Src>C:\ProgramData\Konica Minolta\conopsd\var\blox\node_4\tmp.d\Testfile.pdf</Src>
        <File>file</File>
    <PageException>
        <PerPageSetting>
                <PageRange>1-5</PageRange>
            <Media>
                <PaperName>A4</PaperName>
            </Media>
        </PerPageSetting>
    </PageException>
</Ticket>
```

Page Size Route



Note: This node works with PDF, TIFF, JPG, PNG and BMP files.

The Page Size Route NODE is used to match the input file against specified conditions (Standard page dimension /Custom dimension) so that the file may then be moved to the appropriate node in the workflow. Set the Page Size Condition using the Page Size Route NODE.

This node can have the following outbound connectors:

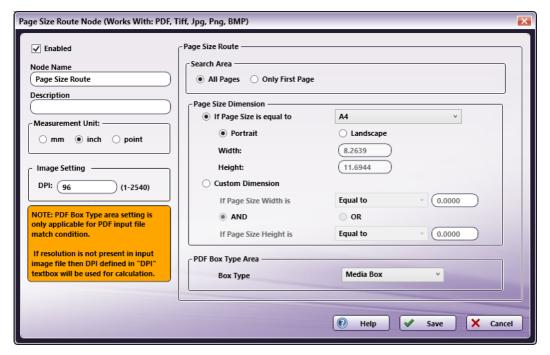
- Yes: If the page size matches the specified condition.
- No: If the page size does not match the specified condition.

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• Error: If the document type is other than PDF, TIFF, JPG, PNG and BMP.

Using the Page Size Route Node

Add the Page Size Route Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Page Size Route Node's window:



- Select the Enabled checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were
 not present (i.e., continue along the default or positive path). Note that a disabled node will not check for logic or error conditions.
- In the $\bf Node\ Name$ field, enter a meaningful name for the Page Size Route node.
- In the **Description** field, enter a description for the Page Size Route node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point
- In the **DPI** field, enter a DPI value for **Image Setting**. If the DPI value is not present in the input image files then it will consider user configured DPI value for image paper size calculation. DPI value support range is 1 to 2540 and the default value is 96.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved
- Select the **Help** button to access online help.

Page Size Route

Search Area

In the **Search Area**, specify the page(s) to which the search is applied.



- All Pages: The condition check is applied to all pages of the input document.
- Only First Page: The condition check is applied to only the first page of the input document.

Page Size Dimension

In the Page Size Dimension area, delimit the search by selecting one of two radio buttons.

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- If Page Size is equal to: select a standard Paper Size from the drop-down.
 - Choose **Portrait** or **Landscape** page orientation.
 - Width: The Width of selected paper size.
 - Height: The Height of selected paper size.
- Custom Dimension:
 - If Page Size Width is: select a delimiter from the drop-down. The options are: Equal To, Less Than, or Greater Than.
 - Enter the **Paper Size Width** value in the adjoining text box.
 - If Page Size Height is: select a delimiter from the drop-down. The options are: Equal To, Less Than, or Greater Than.
 - Enter the Paper Size Height value in the adjoining text box.
 - Choose AND to specify that both the Page Width and Height criteria must be met or choose OR to specify that either the Page Width or Height criteria must be met.

PDF Box Type Area

In the PDF Box Type Area, choose the type of box that needs to be detected: Media Box, Bleed Box, or Trim Box.



Based on the value selected, the node matches the Standard /Custom size against the input PDF **Box Type** accordingly. If the input PDF **Box Type** matches the values set for the Standard/Custom size, the input PDF is routed to the **YES** connector. If it does not match, the input PDF is routed to the **NO** connector. If **Bleed Box** or **Trim Box** are not detected, **Media Box** is used.

Preflight



Preflight

Note: This node works with PDF files (version 1.3 or later).

When a job is sent to the **Preflight Node**, it applies various Preflight checks including **General Checks** and **Compliance/Fixes**. The node will identify **General Check**-type issues and run **Compliance** checks and fix such errors that are identified. Finally, this node will produce a report (in PDF format) that contains the details of the check results and fixes.

Notes:

- (See Principal Functions later in this document for more details about the General Checks and Compliance/Fixes supported.)
- When creating a workflow that includes the Preflight Node, the Yes, No, and Error routes must be included as a part of the node's functionality for the following processing to work correctly.

With the workflow structured as noted above, the following functionality is supported:

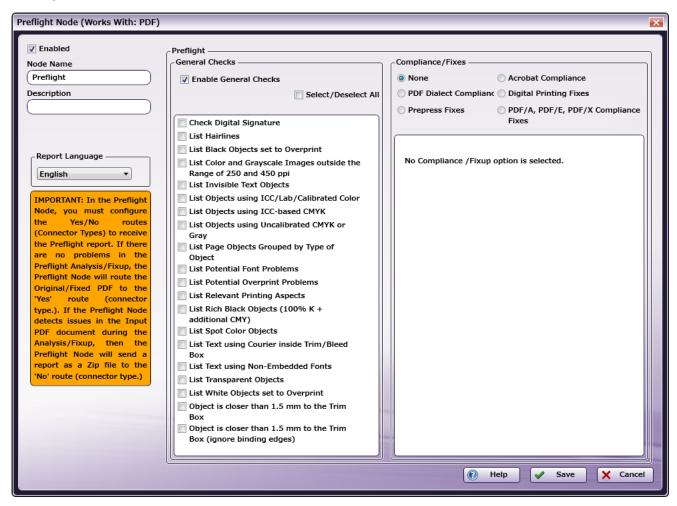
1. If there is an error processing the original PDF file, the file is moved to the **ERROR** route.

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- If the Enabled General Checks checkbox and/or one Compliance/Fixes option is selected, the check/analysis is run. If there are no
 warnings/errors detected, the analysis report is compressed into a ZIP file and moved to the NO route AND the original PDF is moved through the
 YES route.
- 3. If the **Enabled General Checks** checkbox and/or one of the **Compliance/Fixes** options is selected, the check/analysis is run. If there are any warnings/errors detected and/or there are compliance issues that cannot be repaired, the original PDF file and the analysis report are compressed into a ZIP file and moved to the **NO** route.
- 4. If only the **Enabled General Checks** checkbox is selected, the check/analysis is run. If warnings/errors are detected, the original PDF file and the analysis report are compressed into a ZIP file and moved to the **NO** route.
- 5. If only one **Compliance/Fixes** option is selected, the check/analysis is run. If issues are found and corrected, the analysis report is compressed into a ZIP file and moved to the **NO** route AND the original PDF is moved through the **YES** route. If fixes are found that cannot be applied, the original PDF file and the analysis report are compressed into a ZIP file and moved to the **NO** route.
- 6. The analysis/fixup report is always moved to the **NO** route.

Using the Preflight Node

Add the Preflight Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Preflight Node's window:



Use this window to specify the Preflight Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Preflight Node.
- In the **Description** field, enter a description for the Preflight node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Select a value from the **Report Language** drop-down. The following languages are supported: **English, French, German, Italian, Spanish, Traditional Chinese, Simplified Chinese**, and **Japanese**.

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Note: By default, the **Report Language** is selected based upon the language settings of the local system upon which Dispatcher Phoenix is installed.

- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

The Preflight Node's Principal Functions

The following functions are supported.

General Checks

From the ${\bf General\ Checks}$ panel, specify which checks the node should conduct.

- Enable General Checks: Select the checkbox to activate the General Checks options. Once activated, the following General Checks are supported:
 - Check Digital Signature
 - List Hairline
 - List Black Objects set to Overprint
 - List Color and Grayscale Images outside the Range of 250 and 450 ppi
 - · List Invisible Text Objects
 - List Objects using ICC/Lab/Calibrated Color
 - List Objects using ICC-based CMYK
 - List Objects using Uncalibrated CMYK or Gray
 - List Page Objects Grouped by Type of Object
 - List Potential Font Problems
 - List Potential Overprint Problems
 - List Relevant Printing Aspects
 - \circ List Rich Black Objects (100% K + additional CMY)
 - List Spot Color Objects
 - List Text using Courier inside Trim/Bleed Box
 - List Text using Non-Embedded Fonts
 - List Transparent Objects
 - List white Objects Set to Overprint
 - Object is closer than 1.5 mm to the Trim Box
 - Object is closer than 1.5 mm to the Trim Box (ignore binding edges)
- Select/Deselect All: If Select/Deselect All is checked, all General Check options are selected and will be conducted on all jobs sent through the node. When Select/Deselect All is deselected, all General Check options are deselected.

Compliance/Fixes

From the **Compliance/Fixes** panel, specify which compliance check/fix should be applied. Only one radio button may be selected. If multiple options are required, create multiple Preflight Nodes for the workflow, once for each Compliance/Fix.

- None: This is the default value. When selected, no Compliance/Fixes checks are applied.
- Acrobat Compliance: Select the Acrobat compliance version the node supports.
- PDF Dialect Compliance: Select the PDF Standard compliance option the node implements.
- Digital Printing Fixes: Select this option to optimize digital printing.
- Pre-press Fixes: Select this option to apply a PrePress Fix.
- PDF/A, PDF/E, PDF/X Compliance Fixes: Select this option to apply the fix to jobs that pass through the node.

Preflight Node's PDF File Report

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The report is generated in PDF format, in the language selected from the drop-down. By default, the **Report Language** is selected based upon the language settings of the local system upon which Dispatcher Phoenix is installed.



The PDF File Report report contains the following data:

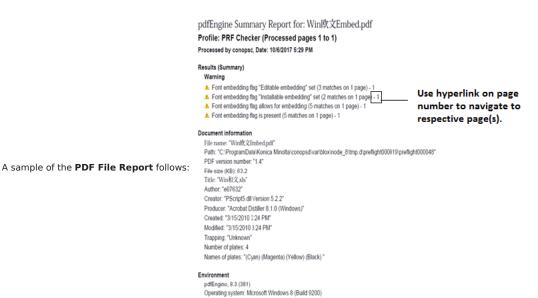
- · Information page:
 - Header: PDF File Name, Profile Name
 - Document information: File Name, Path, PDF Version, File Size, Title, Author, Creator, Producer, Created, Modified, Keywords, Trapping, PDF/X Version, Number of Plates, Names of Plates.
 - · Summary about Info, Warnings and Errors: Item Name, Number of Hits, Number of Hit Pages, List of Hit Pages

Notes:

- The Summary info is provided for each page of the original PDF file; however, the list is limited to the Page Width of the PDF File Report.
- Navigate to an individual page by selecting its page number in the Summary section. Detailed Warning and Error information is available in Adobe Acrobat's Layers option. Access the Layers option via View > Show/Hide > Navigation Panes > Layers menu.
- The report only supports Adobe Acrobat and Adobe Pro products.
- Marked PDF pages: Marked PDF pages are copies of the pages of the PDF input document that identify the hit object located during processing. The following Color Code is used to mark hit objects:

Info: BlueWarning: Yellow

• Error: Red



Limitations

Important!

1. The Preflight Node supports a maximum input file size of 1.2 GB. The current ZIP library supports a maximum file size up to 2 GB. When a file larger than 1.2 GB is used, there are issues producing the (report + file) ZIP file.

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- 2. The Preflight Node supports an input file with a 20k pages; however, based on the latest testing estimates, it will take up to 10 hours to process a file of this size.
- 3. Password Protected PDF files will not be processed by the node.

Tabs: Bookmarks



Note: This node works with PDF files (version 1.3 or later), and is intended for use with PDF files that already contain bookmarks.

The **Tabs: Bookmarks Node** is used to insert tab sheets before all the bookmarked pages. The inserted tab sheet information is updated in the metadata and carried with the file to the next node of the workflow.

There are two types of bookmarks in PDF files:

- Page Destination Bookmark: This type of bookmark points to a page number in the PDF document.
- Named Destination Bookmark: This type of bookmark points to a name that is defined globally and references a destination page in the PDF document.

This node supports three metadata key-value pairs. These key-value pairs are set (predefined) in the PDF prior to being input to this mode:

- job:tab.paper.w (Optional): The Paper Width of the tab sheets.
- job:tab.paper.h (Optional):The Paper Height of the tab sheets. Paper Width and Paper Height must be set together. If they are not, the Tab Paper Size applied is based on the size of the first page size of the PDF file.
- job:tab.paperweight (Optional): The Paper Weight of the tab sheets. If the Tab Paper Weight metadata is invalid then the Tabs: Bookmarks Node displays a message in the Activity Log of the workflow and moves the PDF document to the node's Error folder.

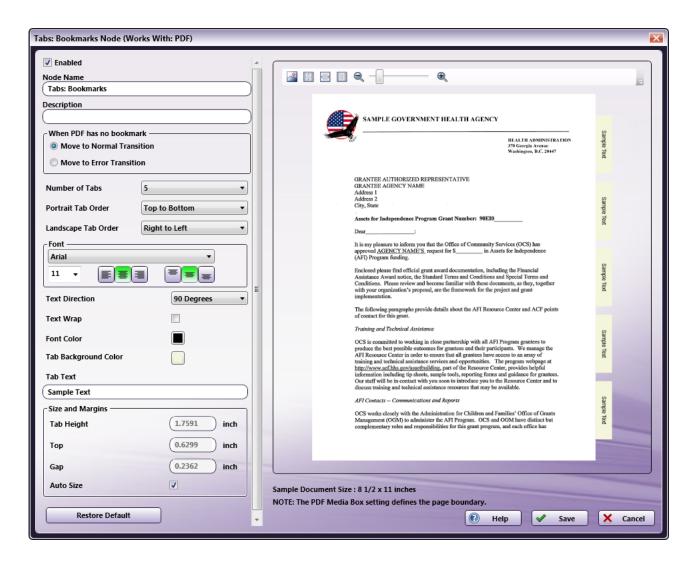
Notes:

- This Help file contains detailed information about supported Tab Paper Weights. Refer to Job Ticket Metadata. When launched, the
 Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User
 info), and the metadata values from the active node.
 - The Orientation of the Tab Sheet is based on the first page of the merged input PDF. When the first page of the merged input PDF is Portrait, the tab sheet inserted will be Portrait and the value entered in the Tab Order field is applied. When the first page of the merged input PDF is Landscape, the tab sheet inserted will be Landscape and the value entered in the Tab Order field is applied.

Using the Tabs: Bookmarks Node

Add the Tabs: Bookmarks Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Tabs: Bookmarks Node's window:

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Specify the Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Tabs: Bookmarks Node.
- In the **Description** field, enter a description for the Tabs: Bookmarks Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

Select Transition

If the Tabs: Bookmarks Node receives a PDF file that does not contain Bookmarks, use this setting to tell the workflow what to do with the file:



- Move to Normal Transition: even without Bookmarks, the file is sent to the next node in the workflow and processed normally.
- Move to Error Transition: Because the Bookmark application is integral to the processing of the job, files that lack Bookmarks are moved to an Error folder and must be processed manually.

Set the Bookmark and its Text Properties

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The following sections describe the remaining setting options for the Bookmark Tabs.

Number of Tabs

Specify the number of tabs for the document from the drop-down.

Portrait Tab Order

Specify the Tab Order for Tab Sheets using Portrait Orientation.



- Top to Bottom: If the document's Orientation is Portrait, Tabs are added from the top to the bottom.
- Bottom to Top: If the document's Orientation is Portrait, Tabs are added from the bottom to the top.

Landscape Tab Order

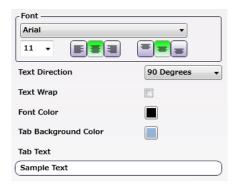
Specify the Landscape Tab Order for Tab Sheets using Landscape Orientation.



- Right to Left: If the document's Orientation is Landscape, Tabs are added from the right to the left.
- Left to Right: If the document's Orientation is Landscape, Tabs are added from the left to the right.

Tab Text

In the Tab Text configuration panel, specify the following:



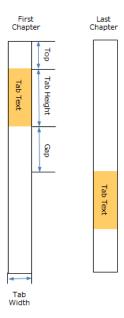
Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the Bookmarks in the original PDF file. If these bookmarks contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

- **Font:** Choose a font name and size from the drop-downs. Use the first set of icons to specify the justification of the text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the text within the bounding box (top center, center, bottom center).
- Text Direction: Specify the orientation of the tab text by choosing an option from the drop-down menu.
- **Text Wrap:** Select the checkbox to apply this function to the tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Tab Background Color: Click to open a color selection option, and then select a color value.
- Tab Text: A real-time preview of the Tabs: Bookmarks Node's text.

Note: The value entered in the **Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the PDF Bookmarks.

Size and Margins

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Use this section to specify the **Height** of the tabs and the **Top** and **Gap** margin values. The **Preview** up-dates in real-time to show how the printed document will look.



- Tab Height: Specify Height of the tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first tab.
- Gap: Specify the Gap margin value. This is the distance between each tab.
- Auto Size: Select to automatically update the values of Tab Height, Top and Gap when the Number of Tabs value is modified.

Note: If tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Restore Default

Use the **Restore Default** button to restore all the default values of the Tab: Bookmarks Node.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.

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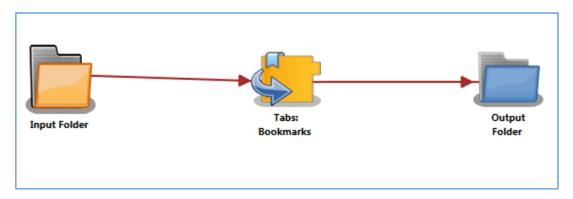
Tool Bar Icons	Description
	Image icon. Click on this icon to change the sample preview image. Only PNG, JPEG and PDF formats are supported. Supported image display sizes are: A3,A4,A5,B4,B5,Half Letter,Letter, and Tabloid.
**	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon and the sample document fills the Preview area.
€	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Sample of a Tabs: Bookmarks Workflow

The purpose of this workflow is to receive PDF files, and then add tabs to a PDF file based on the bookmarks contained in the input PDF file. The modified PDF file is then sent to an Output folder.

Note: When a workflow includes the Tab: Bookmarks Node there is no need to add the Tabs: Predefined Node to the workflow. This is because the Tabs: Bookmarks node adds tab sheets into the PDF document and the tab information is added to the output metadata.

A detailed explanation of each node of the workflow follows:



Input Folder Node: Configure the Input Folder to collect PDF files with bookmarks and forward them to the Tabs: Bookmarks Node in the workflow.

Tabs: Bookmarks: The Tabs: Bookmarks Node will add tabs to the input PDF document based on bookmarks in the input PDF file, and then send the file forward in the workflow.

As an example of how the operation is applied, a PDF file enters the node. It has 10 pages. Page 2 and Page 6 each are assigned Bookmarks. In the output file, the tab sheets are inserted before page 2 and page 6.

Output Folder Node: The document (which includes its updated tabs) is placed into the folder path that is configured in the Output Folder Node.

Tabs: Insert



Note: This node works with PDF files (version 1.3 or later).

The Tabs: Insert Node is used to insert Tab sheets into a file. The inserted Tab sheet information is saved in the metadata and carried with the job to the next node of the workflow.

This node supports five metadata key-value pairs:

• job:tab.page (Required): The list of pages where insert Tab sheets are added.

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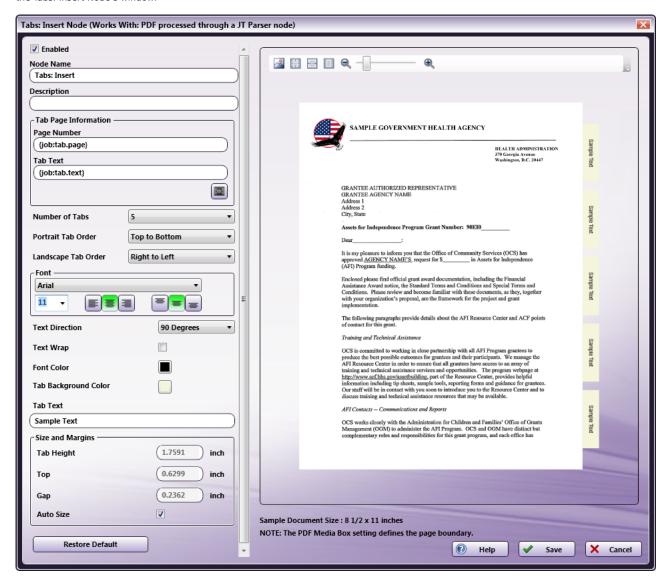
- job:tab.text (Required): The list of Tab sheets and their text. The number of job:tab.text items must match the number of Tab pages.
- job:tab.paper.w (Optional): The Paper Width of the Tab sheets.
- job:tab.paper.h (Optional): The Paper Height of the Tab sheets. Paper Width and Paper Height must be set together. If they are not, the Paper Size applied is based on the size of the first page size of the PDF file.
- job:tab.paperweight (Optional): The Paper Weight of the Tab sheets. If the Tab Paper Weight metadata is invalid then the Tabs: Insert Node displays a message in the Activity Log of the workflow and moves the PDF document to the node's Error folder.

Notes:

- This Help file contains detailed information about supported Tab Paper Weights. Refer to Job Ticket Metadata. When launched, the
 Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User
 info), and the metadata values from the active node.
- The Orientation of the Tab Sheet is based on the first page of the merged input PDF. When the first page of the merged input PDF is
 Portrait, the Tab sheet inserted will be Portrait and the value entered in the Tab Order field is applied. When the first page of the merged input PDF is Landscape, the Tab sheet inserted will be Landscape and the value entered in the Tab Order field is applied.

Using the Tabs: Insert Node

Add the Tabs: Insert Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Tabs: Insert Node's window:



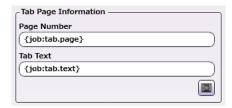
Specify the Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

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- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Tabs: Insert Node.
- In the **Description** field, enter a description for the Tabs: Insert Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

Tab Page Information

Use the Tab Page Information panel to specify the Page Number and Tab Text metadata keys:



- Page Number: Click the Browse for metadata button (), and then drag-and-drop the {job:tab.page} metadata key onto the Page Number field. The metadata key can also be manually entered.
- Tab Text: Click the Browse for metadata button (), and then drag-and-drop the {job:tab.text} metadata key onto the Tab Text field.

 The metadata key can also be manually entered.

Set the Tabs and the Text Properties

The following sections describe the remaining setting options for the Tabs.

Number of Tabs

Specify the number of Tabs for the document from the drop-down.

Portrait Tab Order

Specify the Tab Order for Tab Sheets using Portrait Orientation.



- Top to Bottom: If the document's Orientation is Portrait, Tabs are added from top to bottom.
- Bottom to Top: If the document's Orientation is Portrait, Tabs are added from bottom to top.

Landscape Tab Order

Specify the **Tab Order** for **Tab Sheets** using **Landscape Orientation**.

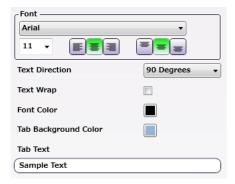


- Right to Left: If the document's Orientation is Landscape, Tabs are added from right to left.
- Left to Right: If the document's Orientation is Landscape, Tabs are added from left to right.

Tab Text

In the Tab Text configuration panel, specify the following:

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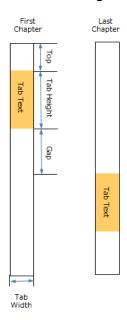


Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the Chapter Name metadata. If these names contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

- Font: Choose a font name and size from the drop-downs. Use the first set of icons to specify the jus-tification of the Tab text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the Tab text within the bounding box (top center, center, bottom center)
- Text Direction: Specify the orientation of the Tab text by choosing an option from the drop-down menu.
- Text Wrap: Select the checkbox to wrap the Tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Tab Background Color: Click to open a color selection option, and then select a color value.
- Tab Text: A real-time preview of the Tabs: Insert Node's text.

Note: The value entered in the **Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the Tab Text metadata in the PDF file.

Size and Margins



Use this section to specify the Height of the Tabs and the Top and Gap margin values. The Preview updates in real-time to show how the printed document will look.

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- Tab Height: Specify the Height of the tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first Tab.
- Gap: Specify the Gap margin value. This is the distance between each Tab.
- Auto Size: Select to automatically update the values of Tab Height, Top and Gap when the Number of Tabs value is modified.

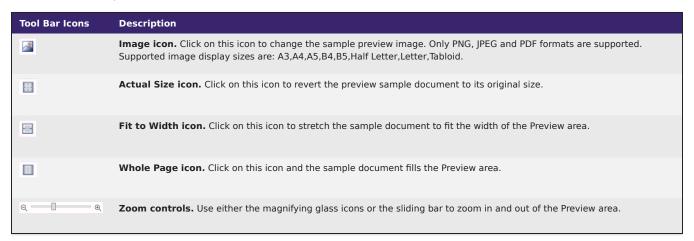
Note: If Tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Restore Default

Use the Restore Default button to restore all the default values of the Tabs: Insert Node.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.



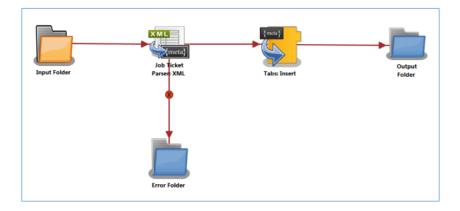
Sample of a Tabs: Insert Node Workflow

The purpose of this workflow is to receive XML files, parse the job ticket into XML metadata, and then add Tabs to the file based on the chapter information contained in the job ticket. The modified file is then sent to an Output Folder.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:

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Input Folder Node: Configure the Input Folder to collect job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded job ticket files contain the job ticket attribute information. This order information is used when Tabs are added to the files in the Tabs: Insert Node. Below is a sample job ticket that contains the file order information:

```
<Ticket>
        <Media>
        <Width>8.5</Width>
        <Height>11</Height>
        </Media>
        <Paper>
                <Unit>inch</Unit>
        </Paper>
        <Width>9</Width>
        <Height>11</Height>
                <Weight>60</Weight>
        <ChapterInfo>
                <Page>
                        <Chapter>1</Chapter>
                        <Chapter>4</Chapter>
                </Page>
                <Text>
                        <Chapter>Chapter1</Chapter>
                        <Chapter>Chapter2</Chapter>
                </Text>
        </ChapterInfo>
        </Tab>
        <File>file</File>
        <Src>C:\\test files\\10Pages_Letter.pdf</Src>
```

Job Ticket Parser: XML Node: If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

- ${\bf 1.}\ {\bf Open\ a\ text\ editor\ then\ copy\ the\ sample\ XML\ code\ noted\ is\ the\ sample\ job\ ticket\ above.}$
- 2. Save locally as XML_Tabs_Insert.XML.
- 3. Double-click on the Job Ticket Parser: XML Node.The settings screen opens.
- 4. In the left panel, set the following values:
 - $\circ~$ Enabled checkbox: Select to enable the node to accept jobs
 - $\circ~$ Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.

Note: The job ticket referenced above (XML_Tabs_Insert.XML), has Tab paper size in inches.

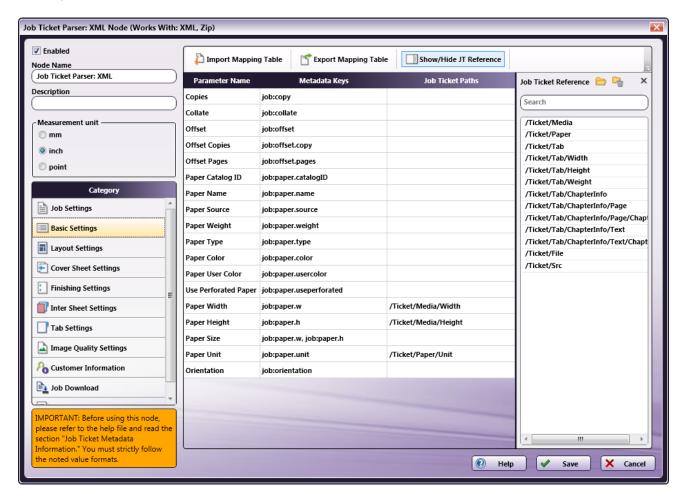
5. In the Job Ticket Reference panel (far-right), locate the Open icon:



6. Click the icon. On the screen that opens, navigate to and select the file saved in Step 2 above (XML Tabs_Insert.XML).

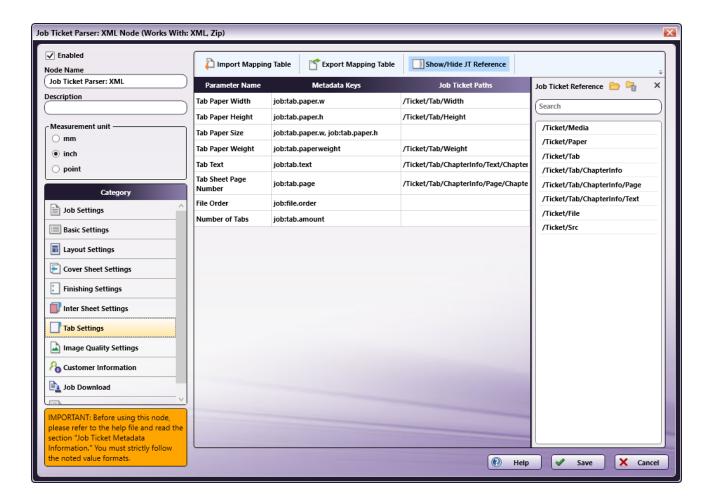
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- 7. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference panel** (far-right).
- 8. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



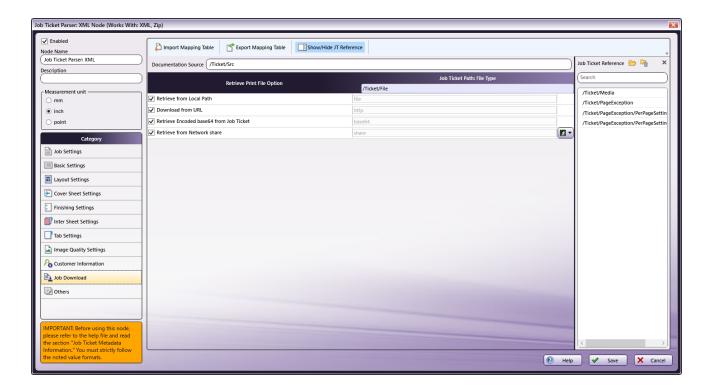
- 9. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 10. Drag-and-drop /Ticket/Media/Width to the Job Ticket Paths cell of the Paper Width row.
- 11. Drag-and-drop /Ticket/Media/Height to the Job Ticket Paths cell of the Paper Height row.
- 12. Drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 13. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 14. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- $15. \ \mathsf{Drag\text{-}and\text{-}drop} \ \textit{\textbf{/}Ticket/Tab/Width} \ \mathsf{to} \ \mathsf{the} \ \textit{\textbf{Job}} \ \mathsf{\textbf{Ticket}} \ \mathsf{\textbf{Paths}} \ \mathsf{cell} \ \mathsf{of} \ \mathsf{the} \ \mathsf{\textbf{Tab}} \ \mathsf{\textbf{Paper}} \ \mathsf{\textbf{Width}} \ \mathsf{row}.$
- 16. Drag-and-drop /Ticket/Tab/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 17. Drag-and-drop /Ticket/Tab/Weight to the Job Ticket Paths cell of the Tab Paper Weight row.
- 18. Drag-and-drop /Ticket/Tab/ChapterInfo/Text/Chapter to the Job Ticket Paths cell of the Tab Text row.
- 19. Drag-and-drop /Ticket/Tab/ChapterInfo/Page/Chapter to the Job Ticket Paths cell of the Tab Sheet Page Number row.
- 20. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 21. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 22. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 23. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 24. Once these actions are completed, the screen will appear as shown in the image above.
- 25. Click **Save** to apply the changes to the node.

Tabs: Insert Node: The Tabs: Insert Node will insert Tabs to the PDF document based on the chapter information in *XML_Tabs_Insert.XML*. Inserted Tab sheet information is added to the metadata, and then the file is sent forward in the workflow. In the job ticket example noted at the beginning of this discussion, page1 and page4 are taken as chapters and at the beginning of each, a Tad Sheet is inserted.

Output Folder Node: The document (which includes its updated Tabs) is placed into the folder path that is configured in the Output Folder Node.

Tabs: Merge PDFs



Note: This node works with PDF files (version 1.3 or later).

The **Tabs: Merge PDFs Node** is used to merge all input PDF files and insert a tab sheet before the first page of every PDF file. If three original documents are merged into a single file (e.g., 1.PDF, 2.PDF, and 3.PDF), the default name assigned to the combined PDF file is 1.PDF, the name of the first PDF file of the merge. Each PDF file name is used as the Tab's text. The name of each pre-merged file is used as the text that appears on the Tabs, so for this example, the Tabs text will be 1.PDF, 2.PDF, and 3.PDF.

This node supports four metadata key-value pairs. These key-value pairs are set (predefined) in the PDF prior to being input to this node:

- job:file.order (Required): The list of PDF document paths to merge.
- job:tab.paper.w (Optional): The Paper Width of the tab sheets.
- job:tab.paper.h (Optional): The Paper Height of the tab sheets. Paper Width and Paper Height must be set together. If they are not, the Tab Paper Size applied is based on the size of the first page size of the merged PDF file.
- job:tab.paperweight (Optional): The Paper Weight of the tab sheets. If the Tab Paper Weight metadata is invalid then the Tabs: Merge PDFs node displays a message in the Activity Log of the workflow and moves the PDF document to the node's Error folder.

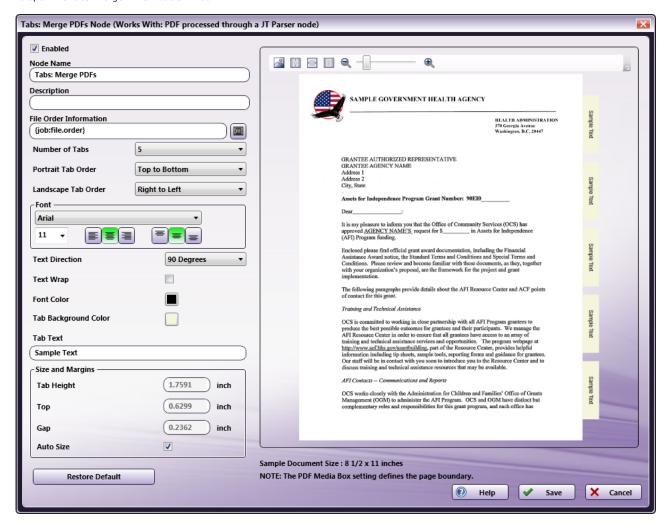
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Notes:

- This Help file contains detailed information about supported Tab Paper Weights. Refer to Job Ticket Metadata. When launched, the
 Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User
 info), and the metadata values from the active node.
- The Orientation of the Tab Sheet is based on the first page of the merged input PDF. When the first page of the merged input PDF is
 Portrait, the tab sheet inserted will be Portrait and the value entered in the Tab Order field is applied. When the first page of the merged input PDF is Landscape, the tab sheet inserted will be Landscape and the value entered in the Tab Order field is applied.

Using the Tabs: Merge PDFs Node

Add the Tabs: Merge PDFs Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Tabs: Merge PDFs Node's window:



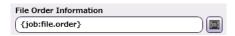
Specify the Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Tabs: Merge PDFs Node.
- In the **Description** field, enter a description for the Tabs: Merge PDFs Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

File Order Information

Specify the metadata input for the File Order Information.

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Click the **Browse for metadata** button (), then drag-and-drop the **{job:file.order}** metadata key onto the File Order Information field. The metadata key can also be manually entered.

Set the Tab and its Text Properties

Set the Tab properties and its text properties in the configuration window.

Number of Tabs

Specify the number of tabs for the document from the drop-down.

Portrait Tab Order

Specify the Portrait Tab Order for Tab Sheets that have a Portrait Orientation.



- Top to Bottom: If the document's Orientation is Portrait, Tabs are added from the top to the bottom.
- Bottom to Top: If the document's Orientation is Portrait, Tabs are added from the bottom to the top.

Landscape Tab Order

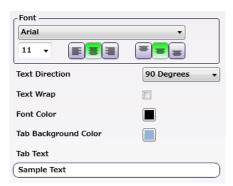
Specify the Landscape Tab Order for Tab Sheets that have a Landscape Orientation.



- Right to Left: If the document's Orientation is Landscape, Tabs are added from the right to the left.
- · Left to Right: If the document's Orientation is Landscape, Tabs are added from the left to the right.

Tab Text

In the **Tab Text** configuration panel, specify the following:



Note: When a tabbed document is printed, the text that prints in the Tab area, comes from the names in the original PDF files. If these names contain Japanese characters that the selected Font does not support, the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.

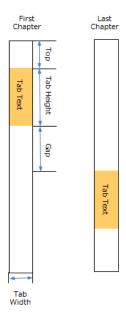
- **Font**: Choose a font name and size from the drop-downs. Use the first set of icons to specify the justification of the tab text within the bounding box (left, center, right). Use the second set of icons to specify the alignment of the tab text within the bounding box (top center, center, bottom center)
- Text Direction: Specify the orientation of the tab text by choosing an option from the drop-down menu.

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- Text Wrap: Select the checkbox to wrap the tab text.
- Font Color: Click to open a color selection option, and then select a color value.
- Tab Background Color: Click to open a color selection option then select a tab background color value.
- Tab Text: A real-time preview of the Tabs: Merge PDFs Node's text.

Note: The value entered in the **Tab Text** field displays in the Sample Preview as a visual aid but has no bearing on the output job when the job prints. The actual tab data printed comes from the file names in the input PDF files.

Size and Margins



Use this section to specify the **Height** of the tabs and the **Top** and **Gap** margin values. The **Preview** updates in real-time to show how the printed document will look.



- Tab Height: Specify the Height of the tab.
- Top: Specify the Top margin value. This is the distance between the top of the document and the first tab.
- Gap: Specify the Gap margin value. This is the distance between each tab.
- Auto Size: Select to automatically update the values of Tab Height, Top and Gap when the Number of Tabs value is modified..

Note: If tab text is too long to display in the text field, the characters are cut based on the selected horizontal and vertical text alignments.

Restore Default

Use the **Restore Default** button to restore all the default values of the Tab: Merge PDFs Node.

Tool Bar

Use the toolbar at the top of the window to customize the **Preview** window.

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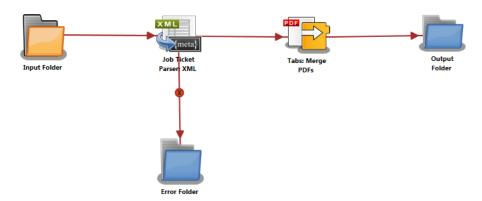
Tool Bar Icons	Description
	Image icon. Click on this icon to change the sample preview image. Only PNG, JPEG and PDF formats are supported. Supported image display sizes are: A3, A4, A5, B4, B5, Half Letter, Letter, and Tabloid.
**	Actual Size icon. Click on this icon to revert the preview sample document to its original size.
	Fit to Width icon. Click on this icon to stretch the sample document to fit the width of the Preview area.
	Whole Page icon. Click on this icon and the sample document fills the Preview area.
Q — • •	Zoom controls. Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

Sample of a Tabs: Merge PDFs Workflow

The purpose of this workflow is to receive XML files, parse the job ticket into XML metadata, combine PDF files into a single document, and then create and add a tab at the start of each PDF file. The modi-fied file is then sent to an Output Folder.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:



Input Folder Node: Configure the Input Folder to collect XML job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded job ticket files contain the job ticket attribute information. They also contain the processing order for the submitted files. This order information is used when the files are merged in the Tabs: Merge PDFs Node. Below is a sample job ticket that contains the file order information:

```
<Ticket>
<File>file</File>
<Src>C:\\test files\\1.pdf</Src>
<Tab>
<Width>9</Width>
<Height>11</Height>
<Weight>40</Weight>
<Order>1.pdf</Order>
<Order>C:\\test files\\2.pdf</Order>
</Tab>
<Paper>
</Paper>
</Paper>
</Paper>
</Picket>
```

Job Ticket Parser: XML Node: If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. The Source Path <Src> noted in the sample job ticket needs to be changed so that the path is valid.

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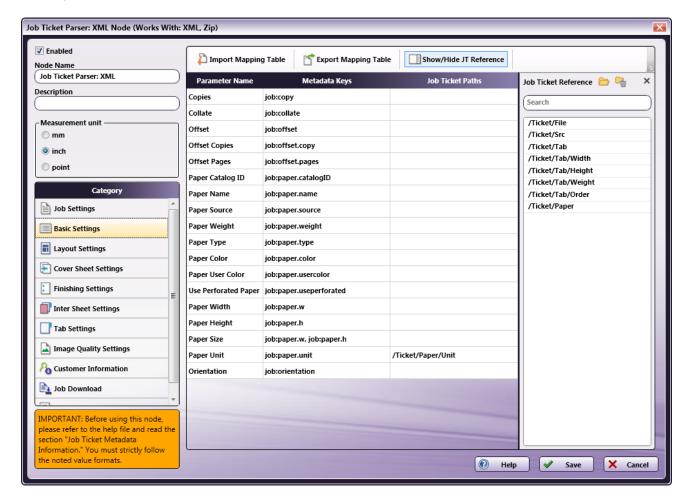
- 3. Save locally as XML_Tabs_Merge_PDFs.XML.
- 4. Double-click on the Job Ticket Parser: XML Node. The settings screen opens.
- 5. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.

Note: The job ticket referenced above(XML_Tabs_Merge_PDFs.XML) has tab paper size in inches.

6. In the **Job Ticket Reference** panel (far-right), locate the **Open** icon:

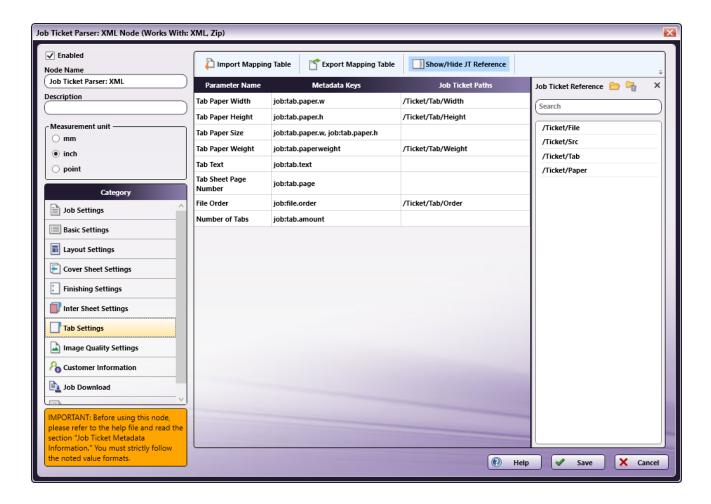


- 7. Click the icon. On the screen that opens, navigate to and select the file saved in Step 3 above (XML Tabs Merge PDFs.XML).
- 8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel (far-right).
- 9. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



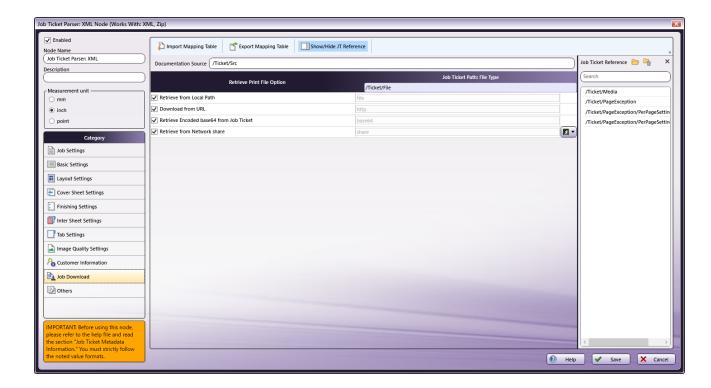
- 10. From the Job Ticket Reference panel, drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 11. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata keys, and Job Ticket Paths columns display in the main panel:

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- 12. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 13. Drag-and-drop /Ticket/Tab/Width to the Job Ticket Paths cell of the Tab Paper Width row.
- 14. Drag-and-drop /Ticket/Tab/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 15. Drag-and-drop /Ticket/Tab/Weight to the Job Ticket Paths cell of the Tab Paper Weight row.
- 16. Drag-and-drop /Ticket/Tab/Order to the Job Ticket Paths cell of the File Order row.
- 17. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 18. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 19. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 20. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 21. Once these actions are completed, the screen will appear as shown in the image above.
- 22. Click Save to apply the changes to the node.

Tabs: Merge PDFs Node: The Tabs: Merge PDFs Node is used to merge all input PDF files and insert a tab sheet before the first page of every PDF file. If three original documents are merged into a single file (e.g., 1.PDF, 2.PDF, and 3.PDF), the default name assigned to the combined PDF file is 1.PDF, the name of the first PDF file of the merge. Each PDF file name is used as the Tab's text. The name of each pre-merged file is used as the text that appears on the Tabs, so for this example, the Tabs text will be 1.PDF, 2.PDF, and 3.PDF.

Output Folder Node: The document (which includes its updated tabs) is placed into the folder path that is configured in the Output Folder Node.

Tabs: Page Shift



Note: This node works with PDF files (version 1.3 or later).

The **Tabs: Page Shift Node** is used to change the specified pages to tab sheets. This node supports only Letter Tab or A4 Tab page sizes. If Letter Tab is selected, the Page Size must be Letter. If A4 Tab is selected, the Page Size must be A4.

The inserted tab sheet information is updated in the metadata and carried with the job to the next node of the workflow.

This node supports two metadata key-value pairs. These key-value pairs are set (predefined) in the PDF prior to being input to this mode:

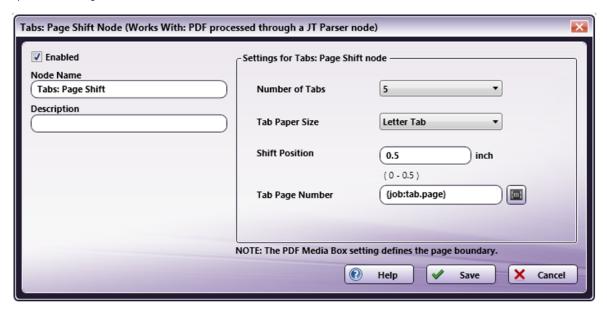
- job:tab.page (Required): The list of page(s) to which the tab shift should be applied.
- job:tab.paperweight (Optional): The Paper Weight of the tab sheets. If the Tab Paper Weight metadata is invalid then the Tabs:Page Shift Node displays a message in the Activity Log of the workflow and the file is moved to the Error Folder.

Note: This Help file contains detailed information about supported Job Ticket Metadata and the JDF XPaths and Value Ranges. Refer to **Job Ticket Metadata**. When launched, the Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User info), and the metadata values from the active node.

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Using the Tabs: Page Shift Node

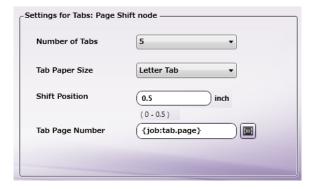
Add the Tabs: Page Shift Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Tabs: Page Shift Node's window:



- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Tabs: Page Shift Node.
- In the **Description** field, enter a description for the Tabs: Page Shift Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

Settings for Tabs: Page Shift Node

In the Settings for Tabs: Page Shift node panel, specify the following:



- Number of Tabs: Select the number of Tabs from the drop-down. Tab height is delimited based on the number of Tabs selected.
- Tab Paper Size: Specify the size of the tab sheet from the drop-down options: Letter Tab, A4 Tab (12.7mm), or A4 Tab (15.0mm) from the second drop-down menu.
- **Shift Position:** Use this option to specify the position of the content of the tab pages. The contents of the specified page are shifted based on the value entered here.

Note: When the Orientation is Portrait, the shift is to the right. If the Orientation is Landscape, the shift is to the bottom.

• Tab Page Number: Specify the metadata input for the Tab Page Number. Click the Browse for metadata button ([[[]]]), then drag-and-drop a metadata keys onto the Tab Page Number field. Only one value may be entered. The metadata key may also be manually entered.

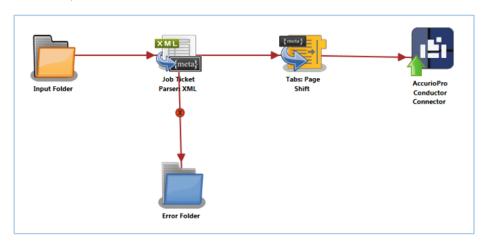
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Sample of a Tabs: Page Shift Workflow

The purpose of this workflow is to receive XML files, parse the job ticket into XML metadata, add tabs to the file based on the chapter information contained in the XML job ticket, and then send the modified document to AccurioPro Conductor for printing. When the job prints, the tabs are included.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:



Input Folder Node: Configure the Input Folder to collect XML job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded XML job ticket files contain the job ticket attribute information. They also contain the chapter information for tab creation which will be used in the Tabs: Page Shift Node. Below is a sample job ticket that contains the chapter information:

```
<Ticket>
 <Media>
        <Weight>40</Weight>
        <Width>8.5</Width>
        <Height>11</Height>
</Media>
<Paper>
        <Unit>inch</Unit>
</Paper>
<Tab>
        <Weight>40</Weight>
        <ChapterInfo>
          <Page>
            <Chapter>1</Chapter>
            <Chapter>4</Chapter>
          </Page>
        </ChapterInfo>
</Tab>
<File>file</File>
<Src>C:\\test files\\10Pages_Letter.pdf</Src>
</Ticket>
```

Job Ticket Parser: XML Node: If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

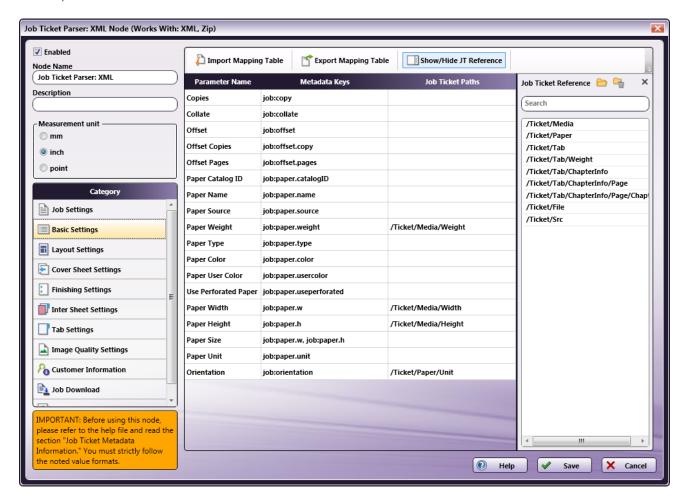
- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. The Source Path <Src> noted in the sample job ticket needs to be changed so that the path is valid.
- 3. Save locally as XML_Tabs_Shift.XML.
- 4. Double-click on the Job Ticket Parser: XML Node. The settings screen opens.
- 5. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node

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6. In the **Job Ticket Reference** panel (far-right), locate the Open icon:

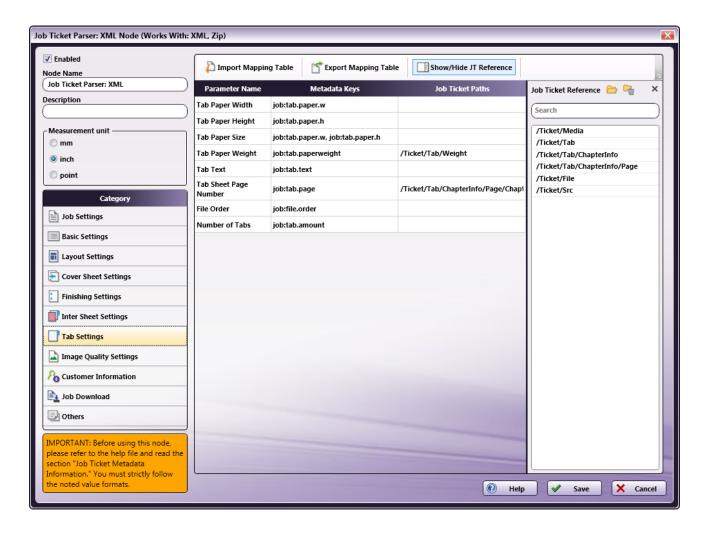


- 7. Click the icon. On the screen that opens, navigate to and select the file saved in Step 3 above (XML_Tabs_Shift.XML).
- 8. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel (far-right).
- 9. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:



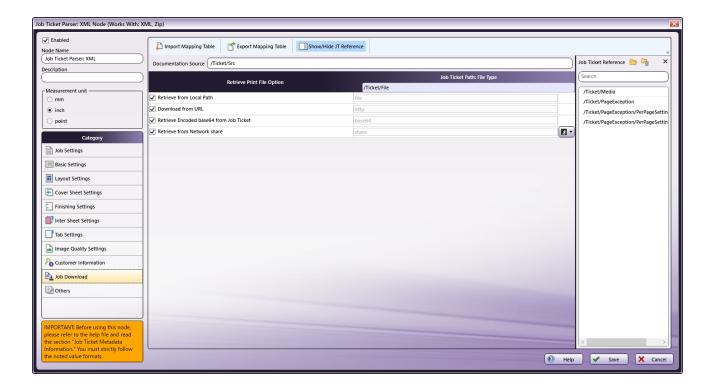
- 10. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 11. Drag-and-drop /Ticket/Media/Weight to the Job Ticket Paths cell of the Paper Weight row.
- 12. Drag-and-drop /Ticket/Media/Width to the Job Ticket Paths cell of the Paper Width row.
- 13. Drag-and-drop /Ticket/Media/Height to the Job Ticket Paths cell of the Paper Height row.
- 14. Drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 15. In the Category panel (far-left), click on the Tab Settings option. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 16. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 17. Drag-and-drop /Ticket/Tab/Weight to the Job Ticket Paths cell of the Tab Paper Weight row.
- 18. Drag-and-drop /Ticket/Tab/ChapterInfo/Page/Chapter to the Job Ticket Paths cell of the Tab Sheet Page Number row.
- 19. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 20. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 21. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 22. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 23. Once these actions are completed, the screen will appear as shown in the image above.
- 24. Click Save to apply the changes to the node.

Tabs: Page Shift Node: The Tabs: Page Shift Node will identify chapter break information in a file (e.g., XML_Tabs_Shift.XML), and then add tab pages as chapter markers. This information is then added to the file's metadata and the file is sent forward in the workflow. In the job ticket example noted at the beginning of this discussion, the first and fourth pages are recognized as chapter breaks and changed to Tab sheets in the document.

AccurioPro Conductor Connector Node: The document (and its Tabs) are sent to the AccurioPro Conductor Connector Node. From there, the documents may be printed.

Tabs: Predefined



Note: This node works with PDF files (version 1.3 or later).

The Tabs: Predefined Node parses all the pages of an input PDF file, and then searches for tab pages. The page numbers of sheets that have tab pages are saved in the metadata and carried with the PDF file to the next node of the workflow.

This node supports three metadata key-value pairs. These key-value pairs are set (predefined) in the PDF prior to being input to this mode:

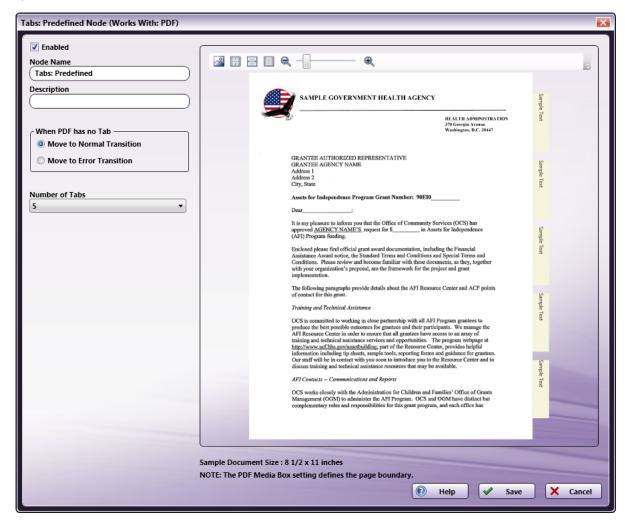
- job:tab.paper.w (Optional) The Paper Width of the tab sheets.
- job:tab.paper.h (Optional) The Paper Height of the tab sheets. Paper Width and Paper Height must be set together. If they are not, the **Tab Paper Size** applied is based on the size of the first page size of the PDF file.
- Job:tab.paperweight (Optional) The Paper Weight of the tab sheets. If the Tab Paper Weight metadata is invalid then the Tabs: Predefined Node displays a message in the Activity Log of the workflow and moves the PDF document to the node's Error folder.

Note: This Help file contains detailed information about supported Tab Paper Weights. Refer to Job Ticket Metadata. When launched, the Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User info), and the metadata values from the active node.

Konica Minolta 882 / 1597 **Note:** The **Orientation** of the **Tab Sheet** is based on the first page of the input PDF. When the first page of the input PDF is **Portrait**, the tab sheet inserted will be **Portrait** and the value entered in the **Tab Order** field is applied. When the first page of the input PDF is **Landscape**, the tab sheet inserted will be **Landscape** and the value entered in the **Tab Order** field is applied.

Using the Tabs: Predefined Node

Add the Tabs: Predefined Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Tabs: Predefined Node's window:



Specify the Tab and Text properties in this window. The Preview panel provides a real-time image of how the selected settings will look on the printed version of the document.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Tabs: Predefined Node.
- In the **Description** field, enter a description for the Tabs: Predefined Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Number of Tabs** field, select the number of tabs from the drop-down option.
- Select the Save button to apply the Tabs: Predefined settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Note: Tab Page Size is determined by the first page of the submitted PDF file. The following sizes are supported: A3, A4, A5, B4, B5, Half Letter, Letter, Tabloid. If the first page doesn't match any of the supported paper sizes, then a "Tab Sheet is not supported" error message is displayed and the PDF file is moved to the Error Folder.

Select Transition

If the Tabs: Predefined Node receives a PDF files that does not contain Tabs, use this setting to tell the workflow what to do with the file:

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- Move to Normal Transition: even without Tabs, the file is sent to the next node in the workflow and processed normally.
- Move to Error Transition: Because the Tab application is integral to the processing of the job, files that lack Tabs are moved to an Error folder and must be processed manually.

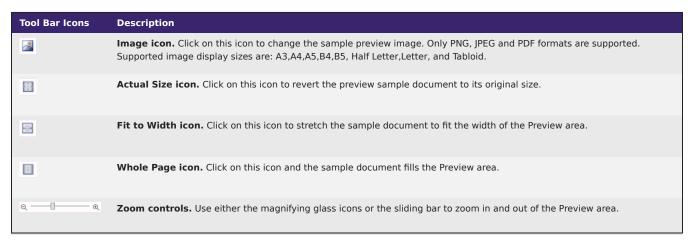
Number of Tabs

Use this drop-down to specify the number of tabs in the document. The value entered here will be converted to metadata. If additional Tab page settings are included, these settings are also added to the metadata. This metadata can then be used in the AccurioPro Conductor Connector Node.

A job can enter this node with the **Number of Tabs** value already specified. If that happens, the value is identified using the metadata key *{job:tab.amount}*. When a job that includes this metadata key enters the Tabs: Predefined Node, any UI values set using this option are ignored and will be overwritten by the metadata value.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.



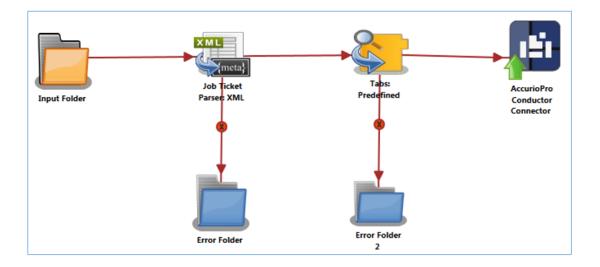
Sample of a Tabs: Predefined Workflow

The purpose of this workflow is to receive XML files, parse the job ticket into XML metadata, extract the predefined tab information, save the extracted information to metadata, and then send the modified document and the extracted tab information to the AccurioPro Conductor for printing. When the job prints, the tabs are included.

Note: This node produces metadata output with key name as "Job".

A detailed explanation of each node of the workflow follows:

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Input Folder Node: Configure the Input Folder to collect XML job tickets and forward them to the **Job Ticket Parser: XML** node in the workflow. The forwarded XML job ticket files contain the tab information. Below is a sample job ticket that contains the tab information:

```
<Ticket>

<Tab>

<Width>9</Width>

<Height>11</Height>

<Weight>40</Weight>

</Tab>

<paper>

<Unit>inch</Unit>

</Paper>

<File>file</File>

<Src>C:\\test files\\Letter_Tab.pdf</Src>
</Ticket>
```

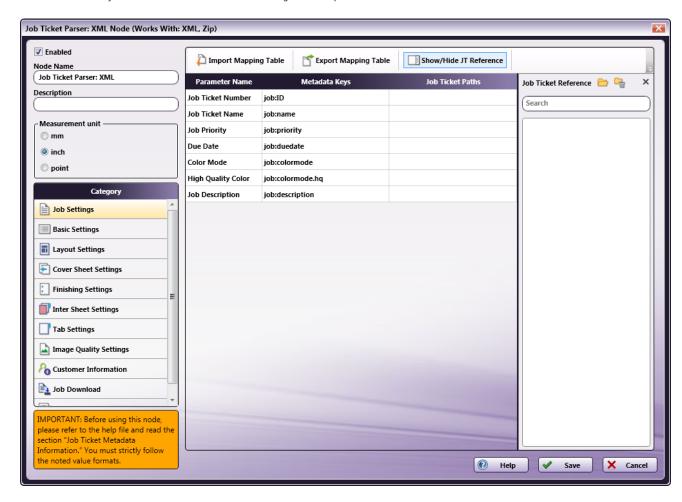
Job Ticket Parser: XML Node: If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

- $1. \ \, {\rm Open} \ \, {\rm a} \ \, {\rm text} \ \, {\rm editor} \ \, {\rm then} \ \, {\rm copy} \ \, {\rm the} \ \, {\rm sample} \ \, {\rm XML} \ \, {\rm code} \ \, {\rm noted} \ \, {\rm is} \ \, {\rm the} \ \, {\rm sample} \ \, {\rm job} \ \, {\rm ticket} \ \, {\rm above}.$
- 2. The Source Path **<Src>** noted in the sample job ticket needs to be changed so that the path is valid.
- 3. Save locally as XML_Tabs_Pre.xml.

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4. Double-click on the Job Ticket Parser: XML Node. The settings screen opens.

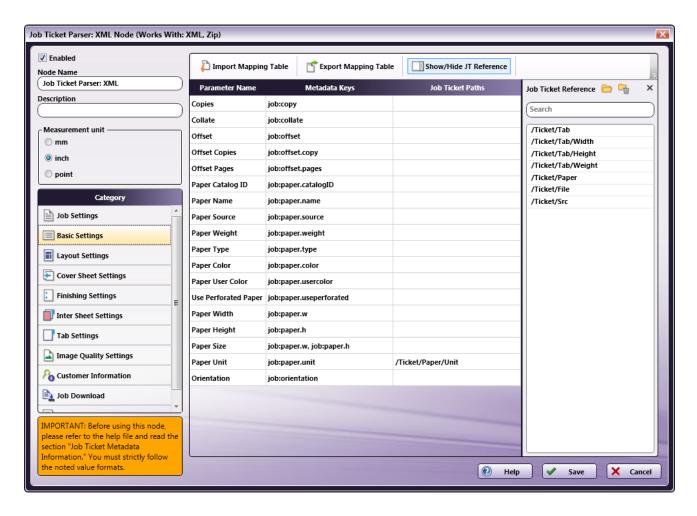


- 5. In the left panel, set the following values:
 - Enable checkbox: Select to enable the node to accept jobs
 - $\circ~$ Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node
- 6. In the Job Ticket Reference panel(far-right), locate the Open icon:



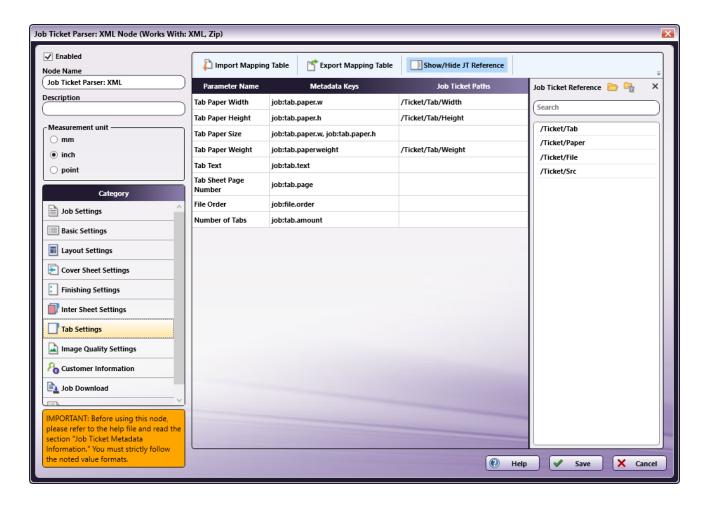
- 7. Click the icon.On the screen that opens, navigate to and select the file saved in Step 3 above (XML_Tabs_Pre.xml).
- 8. When the file opens, its contents (or XPaths) display in the **Job Ticket Reference** panel (far-right).
- 9. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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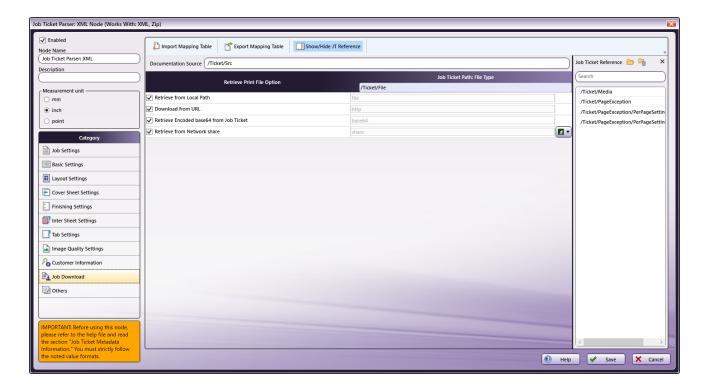
- 10. From the Job Ticket Reference panel, drag-and-drop /Ticket/Paper/Unit to the Job Ticket Paths cell of the Paper Unit row.
- 11. In the Category panel (far-left), click on Tab Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- 12. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 13. Drag-and-drop /Ticket/Tab/Weight to the Job Ticket Paths cell of the Tab Paper Weight row.
- 14. Drag-and-drop /Ticket/Tab/Width to the Job Ticket Paths cell of the Tab Paper Width row.
- 15. Drag-and-drop /Ticket/Tab/Height to the Job Ticket Paths cell of the Tab Paper Height row.
- 16. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 17. In the Retrieve from File Option column, select the checkboxes of all four options: Retrieve from Local Path, Download from URL, Retrieve Encoded base64 from Job Ticket, and Retrieve from Network share.
- 18. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 19. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 20. Once these actions are completed, the screen will appear as shown in the image above.
- 21. Click Save to apply the changes to the node.

Tabs: Predefined Node: The Tab Predefined Node will parse all tab pages in the input document based on the tab page settings, and then add the parsed tab page information to the metadata.

The Tabs: Predefined Node can be connected to the rest of the nodes via Yes and No transitions.

- Regardless of whether a document contains Tab pages, the **Move to Normal Transition** radio button can be selected to route all documents forward in the workflow.
- If a document does not have Tab pages, the **Move to Error Transition** radio button can be selected to route only documents without Tabs to an **Error Folder 2**. Documents with Tabs move forward in the workflow.

AccurioPro Conductor Connector Node: The document (and its Tabs) are sent to the AccurioPro Conductor Connector Node. From there, the documents may be printed.

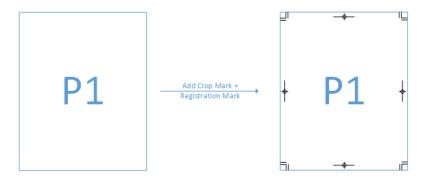
Trim Mark



Note: This node works with PDF files (version 1.3 or later).

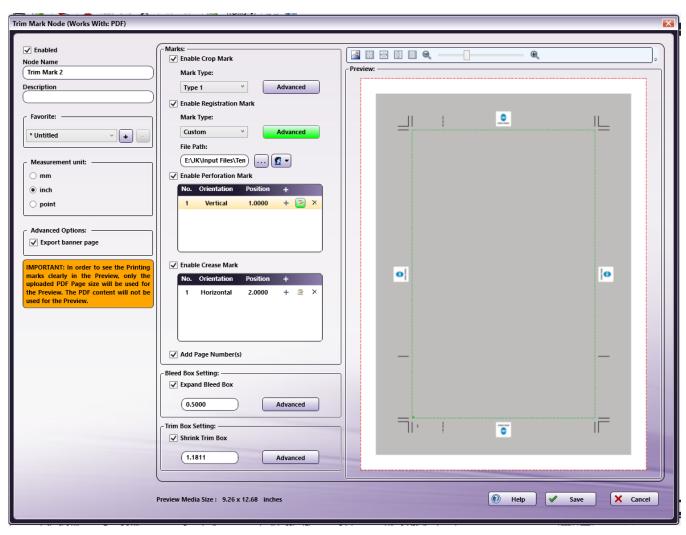
The **Trim Mark Node** is used to printing marks to a PDF file to support precise PostPress work. A PDF file with printing marks is created when the Trim Mark Node is executed.

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Using the Trim Mark Node

Add the Trim Mark Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the Trim Mark Node's window:



Use this window to specify the Trim Mark Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the Trim Mark Node.
- In the **Description** field, enter a description for the Trim Mark Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.

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- In the **Measurement Unit** panel, select a measurement unit radio button. Three types of measurement units are available: **mm**, **inch**, and **point**.
- In the **Advanced Options** panel, select the **Export Banner Page** checkbox so that both the Trim Marked document and a Banner Page are created. The Banner Page shows the types of Trim Marks being applied to the job. The Banner Page is generated and sent along with the main job as an independent job.

Note: In the generated Banner Page, the value "banner" is set as the value for the metadata key "trim:jobtype".

- · Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the Help button to access online help.

Favorite

In the Favorite area, create a template and save it. Saved templates may also be deleted.



To save selected settings as a **Favorite**, add a **Favorite Name** after all settings are chosen.

- Add a New Item: Click the [+] button and the Favorite pop-up opens. Enter a Favorite Name value. Click the Save button.
- Delete an Existing Item: Click the [-] button. A confirmation dialog opens. Click Yes to delete the Favorite Name:



• Edit an Existing Item: Click the [+] button. Modify the setting's changes, as required. By default, the Favorite value will default to Untitled.

To keep the original name, re-enter the old value by replacing Untitled. When finished, click the Save button. If the old name was re-entered, an overwrite verification pop-up opens. In it, click Yes to overwrite the old values.

Note: A maximum of 100 **Favorites** may be saved. When the **Favorite** count reached 100, new addition to **Favorite** is not allowed and following error message will be displayed to user.



Note: If a **Favorite** value other than **Default** is selected when the node opens, the **Favorite** drop-down displays a value of saved Favorite name if the saved Favorite is not deleted/modified by other Trim Mark node in a workflow.

Note: If a **Favorite** value other than **Default** is selected and it is already deleted/modified when the node opens, the **Favorite** drop-down displays a value of [-].

Note: If a Favorite value is modified while the node is open, the Favorite drop-down displays a value of [*Untitled+].

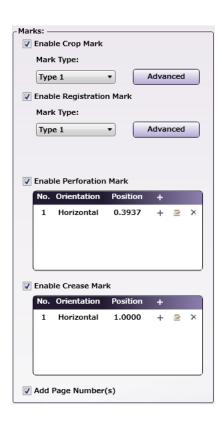
Note: Favorite name can be a combination of any of the below characters.

- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]

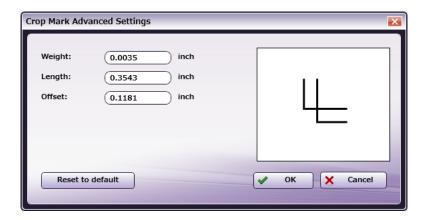
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- Spaces
- Numbers(0 to 9)

Printing Marks

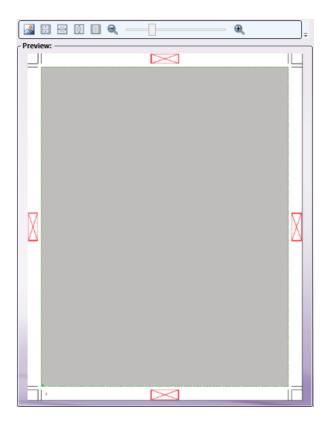


- Enable Crop Mark: Select the checkbox to add Crop Marks.
 - Mark Type: Select the type of Crop Mark from three options: Type 1, Type 2, and Type 3.
 - Advanced: Click the Advanced option to open Crop Mark Advanced Settings screen. Use this screen to specify Custom Crop Mark values for Weight, Length, and Offset. When the Reset to Default button is clicked, all values are reset to their defaults:

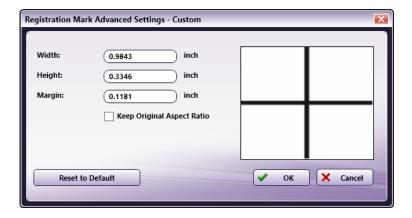


- Enable Registration Mark: Select the checkbox to add Registration Marks.
 - Mark Type: Select the type of registration mark from four options: Type 1, Type 2, Type 3, and Custom. If Custom is selected, the path
 to the image must be specified. Credentials need to be set up to support file access via the network. If the Custom Registration Mark File
 path is blank, the X-mark image is shown in the Preview and Registration Mark Advanced Settings Custom window:

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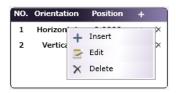
Advanced: Click the Advanced option to open Registration Mark Advanced Settings screen. Use this screen to specify Custom
Registration Mark values for Width, Height, and Margin. When the Reset to Default button is clicked, all values are reset to their
defaults:



• Enable Perforation Mark: Select the checkbox to add a Perforation Mark. When checked, a set of Perforation Marks indicate where to perforate the document. These are displayed as dashed lines on the Preview and the output document. These lines help in the PostPress process.

The Perforation Mark list can contain a maximum of 100 marks, but only 4 rows are displayed in the list.

Use the right-click context menu to **Insert**, **Edit**, or **Delete Perforation Marks**. As an alternative, **Perforation Marks** may be added by clicking on the add (+) icon, and deleted by clicking on the delete (\times) icon.



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• Enable Crease Mark: Select the checkbox to add a Crease Mark. When checked, a set of Crease Marks are displayed as solid-lines on the Preview and the output document. These lines help in the PostPress process.

The Crease Mark list can contain a maximum of 100 marks, but only 4 rows are displayed in the list.

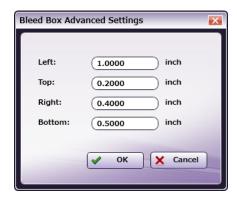
Use the right-click context menu to **Insert**, **Edit**, or **Delete Crease Marks**. As an alternative, **Crease Marks** may be added by clicking on the add (+) icon, and deleted by clicking on the delete(×) icon.

• Add Page Number(s): Select the checkbox to add Page Numbers. When checked, Page Numbers are added at the bottom-right of the output pages using the font: Times New Roman, 6 point.

Bleed Box Settings



- **Expand Bleed Box**: By default, the checkbox is not selected. In this situation, the output document retains the value set in the input document. When the checkbox is selected, an expanded **Bleed Box** value must be specified in the text box.
- Advanced: Click this button to open the Bleed Box Advanced Settings screen. There, change the Left, Top, Right, and Bottom values:



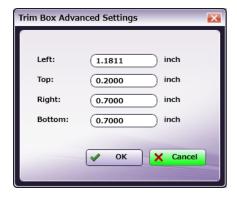
 ${\sf Click}\ {\bf OK}\ {\sf to}\ {\sf apply}\ {\sf and}\ {\sf Save}\ {\sf changes}\ {\sf or}\ {\bf Cancel}\ {\sf to}\ {\sf cancel}\ {\sf the}\ {\sf request}.\ {\sf The}\ {\sf changes}\ {\sf are}\ {\sf applied}.$

Trim Box Setting

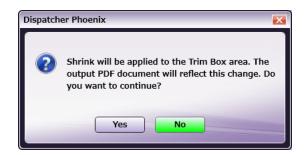


- Shrink Trim Box: By default, the checkbox is not selected. In this situation, the output document retains the value set in the input document. When the checkbox is selected, a custom Shrink Trim Box value must be specified in the text box.
- Advanced: Click this button to open a settings screen. There, change the Left Bleed, Right Bleed, Top Bleed, and Bottom Shrink Trim Box values:

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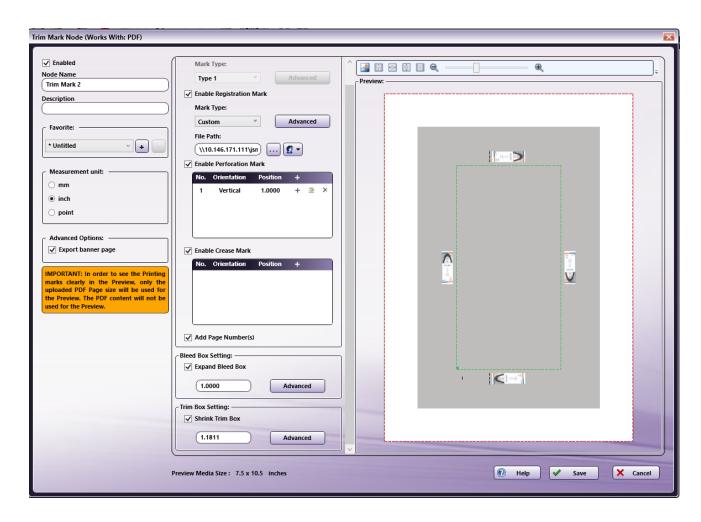
Click **OK** to apply the changes or **Cancel** to cancel the request. If **OK** is selected, the following verification pop-up opens:



Click \boldsymbol{Yes} to apply the changes or \boldsymbol{No} to cancel the request.

If the changes are saved, the Preview screen will display as noted in the following screen:

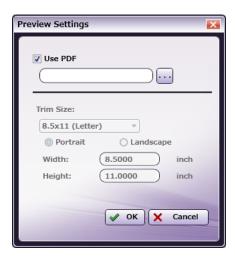
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The green border box notes the applied **Shrink** settings.

Preview Settings

Click the **Preview** icon <a> Image: Review Settings window:



- **Use PDF:** Select the checkbox to use the PDF file to generate the **Preview**. When the option is checked, more than 5,000 pages and up to a 500 MB file can be supported by **Import**.
- Trim Size: The Page Size after all excess material is trimmed off.

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- Portrait/Landscape: Click a radio button to select the document's Orientation.
- Width and Height: These values reflect the trim Width and the trim Height. When a Custom Size is selected in the Trim Size Combo Box, then the Width and Height text boxes are enabled and values may be modified.

While the Preview Settings are being generated, a progress screen displays:



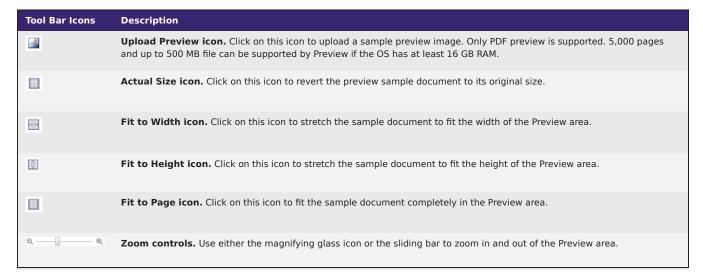
If additional changes are made while the Preview is loading, they will be applied and the Preview that is loaded will be based on the last configured settings.

Notes:

- · The Preview panel only supports PDF files.
- · Only a file from the local drive is supported. Files from a network path are not supported.
- To see the Printing marks clearly in the **Preview** panel, only the uploaded PDF Page size is used to display the **Preview**. PDF content is displayed as a gray box in the **Preview** panel.

Tool Bar

The Toolbar is at the top of the window. Use it to customize the Preview.



Handling metadata

This node outputs the following metadata group categories.

Trim Mark. Post Press.

Limitations

Important!

- 1. Network Credentials
 - a. Credentials are passed/written as is to Workflow/config XML.
 - b. When a workflow is EXPORTED and IMPORTED from a different machine, the Network credential may not work as expected. Credentials may need to be set/provided manually after importing the workflow.

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2. Only publicly shared network paths are supported for the **Use PDF** options in the **Preview** panel. Network paths that require credentials are not supported.

Worksheet Normalizer



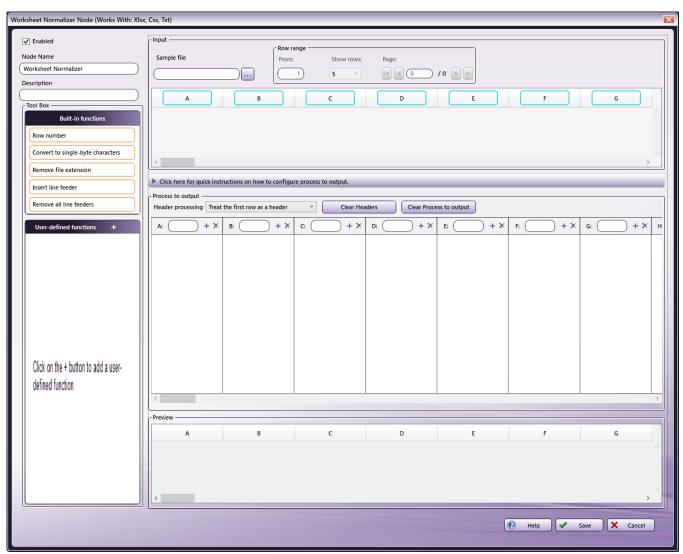
Note: This node works with XLSX, CSV and TXT files.

Note: Refer to Limitations later in this document for more details about the limitations of each file format.

The **Worksheet Normalizer** node edits a given worksheet file based on defined conversion rules and creates a CSV file. The following features can be defined in conversion rules:

- Adding/Deleting/Rearranging columns.
- Merging contents in cells by column.
- Adding/Replacing the text in cells.

Add the Worksheet Normalizer node to the workflow by dragging the **Worksheet Normalizer** node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the **Worksheet Normalizer** node's window.



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- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the Worksheet Normalizer Node.
- In the **Description** field, enter a description for the **Worksheet Normalizer** Node. This is not required, but can be helpful to distinguish between multiple processes. If the description is long, you can hover the mouse over the field to read its entire contents.
- Click the Save button to save the Worksheet Normalizer definitions. If Cancel is selected and the window is closed, the changes are not saved.
- · Click the Help button to access online help.

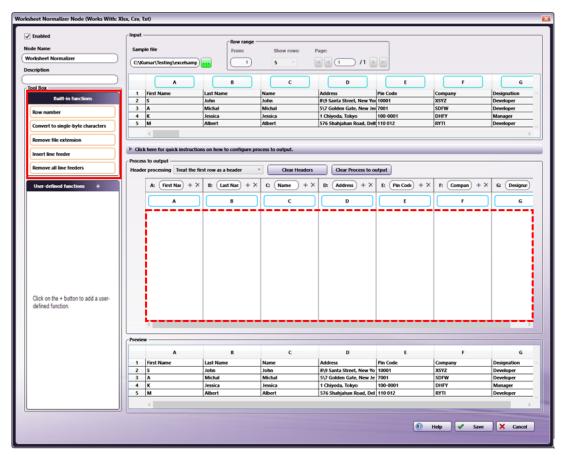
Using the Functions

Two types of functions are supported with the Worksheet Normalizer node, "Built-in functions" and "User-defined functions".

You can use these functions to configure the **Process to output** setting.

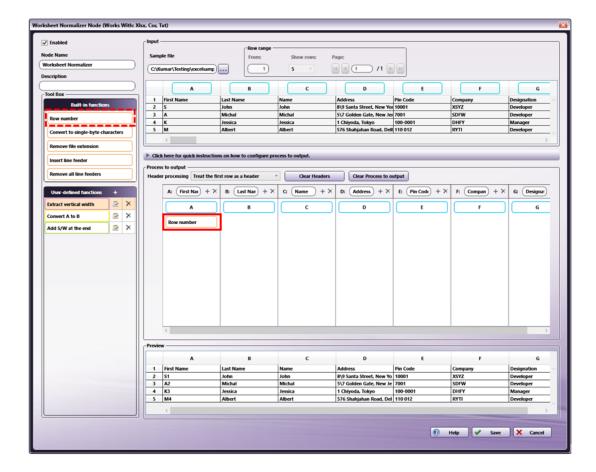
Built-in functions

Built-in functions are functions that have pre-defined conversion rules defined in the **Worksheet Normalizer** node. To use the built-in function, dragand-drop the function to the **Process to output** area.



The following is an example that the Row number is dragged and dropped from the Built-in functions to column A in the Process to output area.

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The Worksheet Normalizer node supports following Built-in functions.

- Insert the row number of the cell.
- Convert to single-byte characters: Convert multi-byte alphanumeric characters and symbols into single-byte characters. For example, "1 2 3 x y z" will be converted into "123xyz".
- Remove file extension: Remove the file extension (such as .pdf or .csv) of a file. For example, "JOB0001.csv" will be processed as "JOB0001".
- Insert line feeder: Insert a new line into all cells in a column.
- Remove all line feeders: Removes all new lines from the cell

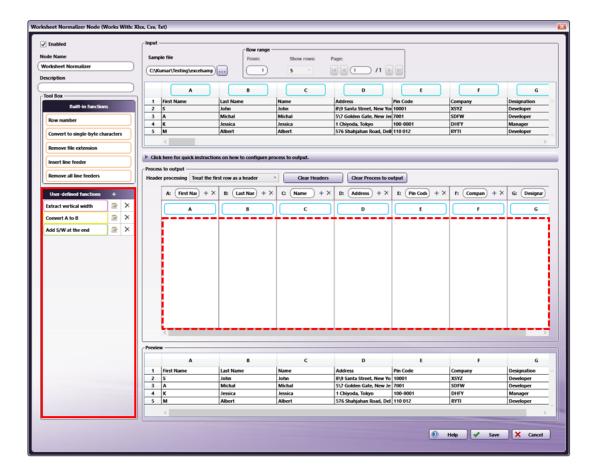
Note: You cannot edit or delete any of the Built-in functions.

 $\label{process} \mbox{ Built-in functions placed in the $\textbf{Process to output}$ area will be highlighted with light orange color box.}$

User-defined Functions

To use a User-defined function, add a User-defined function to the node and drag-and-drop the added function into Process to output area.

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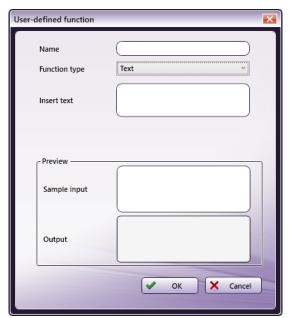
Adding User-defined functions

To add a new user-defined function, click the \blacksquare button in the **User-defined functions** header.

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The $\mbox{\bf User-defined function}$ window will be displayed.



- In the ${\bf Name}$ field, enter the name of the user-defined function.
- In the **Function type**, select the function type from the drop-down.

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Note: Refer to the User-defined Function types later in the document for more details about the types of user-defined functions.

• Enter a sample value in the **Sample input** field within the **Preview** section. When a sample value is entered, the result of processing the sample input value will be displayed in the **Output** field as a preview reference to the user.

Note: Sample input field is not mandatory.

• Click the **OK** button to save the user-defined function. A new user-defined function will be added as below.



• If the **Cancel** or the **x** button is clicked, the window is closed and the changes are not saved.

To add more user-defined functions, click the + (Add) button in the User-defined functions header.

The display order of the user-defined function in the list can be changed by dragging and dropping the added one within the list.

Note: A maximum of 30 User-defined functions can be added.

Editing User-defined functions

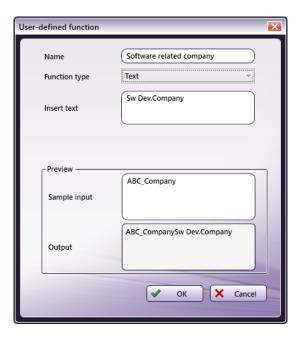
Click the [2] (Edit) button in a previously registered user-defined function to edit that user-defined function.

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The **User-defined function** window will be displayed in which you can edit the user-defined functions. For more information on items, see **Adding User-defined functions** above in this document.

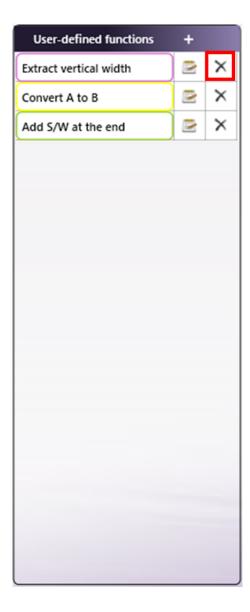
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Deleting User-defined functions

Click the X (Delete) button of a previously registered user-defined function to delete that user-defined function. As an alternative, use the right-click context menu in the **User-defined functions** and select "**Delete all functions**" to delete all current **User-defined functions**.

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- When the user-defined function is not used in the table of the Process to output panel, the message "Do you want to delete the selected user-defined function?" is displayed. Click the **Yes** button to delete the user-defined function.
- When the user-defined function is used in the table of the Process to output panel, the message "Do you want to delete the selected user-defined function? It will also remove the reference in the Process to output section." is displayed. Click the **Yes** button to delete the user-defined function from **Process to output** table and **User-defined functions** panel.

Note: In case a user-defined function used in the table of the **Process to output** area is deleted from **User-defined functions** panel, then the user-defined function will be deleted from the **Process to output** table as well.

User-defined Function types

The **Worksheet Normalizer** node supports **Text**, **Replace** and **Regex** as User-defined function types. Select a **Function type** in the **User-defined function** window. Each user-defined function type is described below.

Text

The Text function type appends the text specified in the Insert text field to the output.

Select Text as the Function type in the User-defined function window to use the Text function type.

The **Text** function type in the **User-defined functions** panel will be highlighted with green color box.

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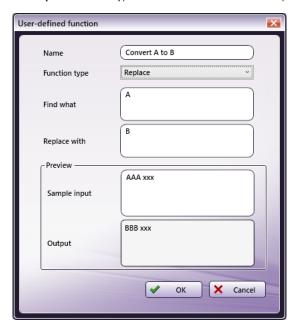
Important! A maximum of 250 characters can be entered in the Insert text field.

Replace

The Replace function type replaces the value specified in the Find what field with the value specified in the Replace with field.

Select Replace as the Function type in the User-defined function window to use the Replace function type.

The Replace function type in the User-defined functions panel will be highlighted with yellow color box.



- In the **Find what** field, enter the text string to be replaced.
- In the **Replace with** field, enter what the text string should be replaced with.

Important! A maximum of 250 characters can be entered in the Find what and Replace with text fields.

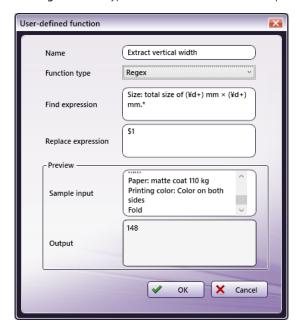
Regex

The Regex function type extracts a string by a regular expression pattern, or replaces the extracted string with a specified string.

Select **Regex** as the **Function type** in the **User-defined function** window to use the **Regex** function type.

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The Regex function type in the User-defined functions panel will be highlighted with purple color box.



In the **Find expression<** field, enter a regular expression for finding a matching string from input data.

Enter a Regex representing a pattern for extracting or replacing matched strings in the Replace expression field.

If matching string is not found, the value of Sample input field will be displayed as it is in the Output field.

Examples of string extraction with regex are shown below.

Example 1: Extract required data

Input Data	Regex	Expected Output
"Offset printing/Leaflet or flier printing/A6 leaflet or flier Delivery date: 4 business days after receipt of order (ship on November 1, 2017) Size: total size of 148 mm × 105 mm Paper: matte coat 110 kg Printing color: Color on both sides Folding process: None"	 Find expression .*Size: total size of (\d+)mm × (\d+)mm.* Replace expression: \$1 	148

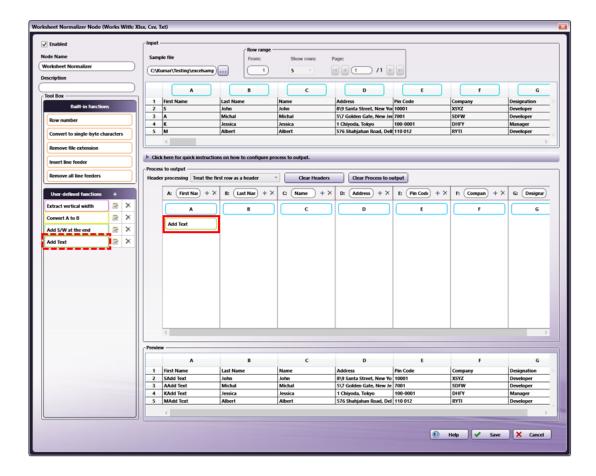
Example 2: Replace required data

Input Data	Regex	Expected Output
"Authorities announced that people need to keep the street clean. They also decided to decorate main street side-walks with sculptures."	 Find expression (.*)(street)(.*)(street)(.*) Replace expression: \$1road\$3road\$5 	"Authorities announced that people need to keep the road clean. They also decided to decorate main road sidewalks with sculptures."

Please refer to $\ensuremath{\textbf{this page}}$ for more information about regular expressions.

The following is an example that the User-defined functions Add Text is dragged and dropped to column A in the Process to output area.

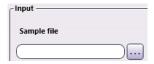
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Note: The User-defined function works only for the column placed.

Input

Upload a sample file in the **Input** field to input a file into the **Worksheet Normalizer** node.



In the **Sample file** field, click on the *ellipsis* button to browse to and select the file to be uploaded. As an alternative, user can manually input the file path of sample file to be uploaded.

Any of the following file formats may be uploaded to the node: XLSX, CSV and TXT.

The selected file will be displayed in the **Sample file** field.

Notes:

- If an unsupported file is given as input, an error will occur.
- If you try to upload a new sample file when there is already a function or column item configured in the Process to output area, a confirmation
 message of overwriting the Process to output setting will be displayed. Based on your selection as below, the Process to output setting will
 be maintained or overwritten with a new sample file.
- Click Yes to clear the current Process to output setting.
- Click No to maintain the current Process to output setting.
- Click Cancel to cancel uploading a new sample file.

Specifying Row range

By configuring the Row range, it is possible to specify the number of rows to be displayed out of the uploaded file.

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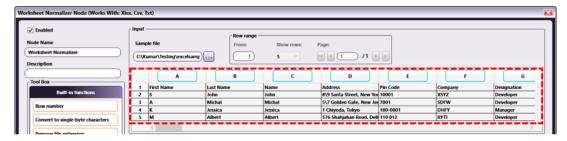
- In the **From** field, enter the starting row to be displayed in the Input area. Note that only numbers are allowed as input in the **From** field and that a maximum of 10000 can be given as input.
- In the **Show rows** drop-down, select the number of rows to be displayed in the Input area. By default, the number of rows that will be displayed is 5. For example, if "Show rows" value is selected as "10", then 10 rows will be displayed in the **Input** and **Preview** area.
- Maximum number of rows that can be displayed per page is 100.
- Page Navigation: Click on the arrows to navigate through multiple pages if the uploaded file has more than 5 rows and "Show rows" value is less than the total number of rows in uploaded sample file.
- Total number of pages displayed and navigated depends on the number of rows in the uploaded sample file and value of "Show rows". For example, if uploaded sample file has 1000 rows and value of "Show rows" is selected as "5", then total number of pages that can be displayed and navigated will be 200.
- In addition, when the From rows are specified, the total number of Page is the number of rows specified from the From to divided by Show rows.
- Only numerical values can be entered in page navigation field. If the value entered in page navigation field is greater than total number of pages that can be displayed, then the **Input** and **Preview** area will be navigated to the last page. For example, if total number of pages that can be displayed is "200" and if any value greater than "200" is entered, then the **Input** and **Preview** area will navigate to page number "200".
- Page navigation will be disabled when number of rows in uploaded sample file is less than or equal to the selected "Show rows" value. For
 example, if uploaded sample file has 8 rows and "Show rows" value is selected as "10", all rows will be displayed in one page and page
 navigation will be disabled.

Notes:

- If value "0" is entered in page navigation text field, then the Input and Preview area will navigate to first page.
- button navigates to previous page or next page
- | button navigates to first page or last page.

Input Area

When a sample file is uploaded to the **Input** area, the data in the file will be displayed in the **Input** area.



- The Input is a read-only table.
- After uploading the sample file, based on **Show rows** drop-down value and sample file data, the **Input** table displays the input data.
- The header columns ("A", "B", "C" and so on in the blue frame in the example UI) in the Input table can be used as setting item by dragging and dropping to the **Process to output** area.



Note: Items other than column IDs cannot be dragged and dropped to the Process to output.

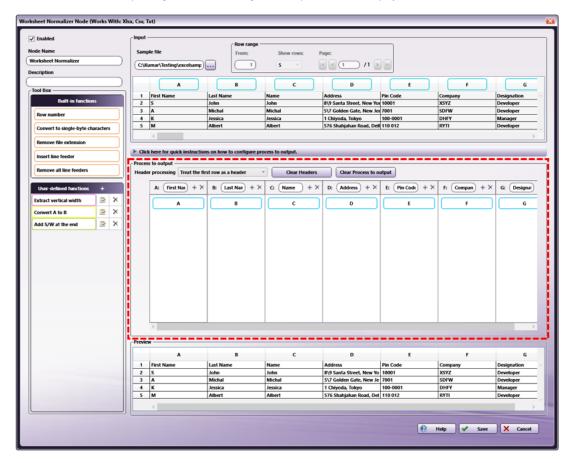
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Process to output

The Worksheet Normalizer node generates a CSV file as an output based on the Process to output settings.

In the **Process to output**, you can add new columns to the input file or delete any columns. In addition, you can configure the column settings for the change to be made on the input file by applying the built-in functions and the user-defined functions.

By default, columns A to CV are displayed in the **Process to output** table. If the input file contains fewer columns than the range of A to CV, then the number of columns corresponding to the column range of the input file will be displayed.



Add / delete columns

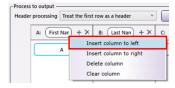
To add a new column to the **Process to output** table, click on the + Add icon in the column header. Alternatively, you can add a column to the right or left side of the selected column by selecting **Insert column on right** or **Insert column on left** from the context menu displayed by right-clicking the column header

To delete a column, click on the Delete X icon in the column header. Alternatively, you can delete the selected column by selecting **Delete column** from the context menu displayed by right-clicking the column header.

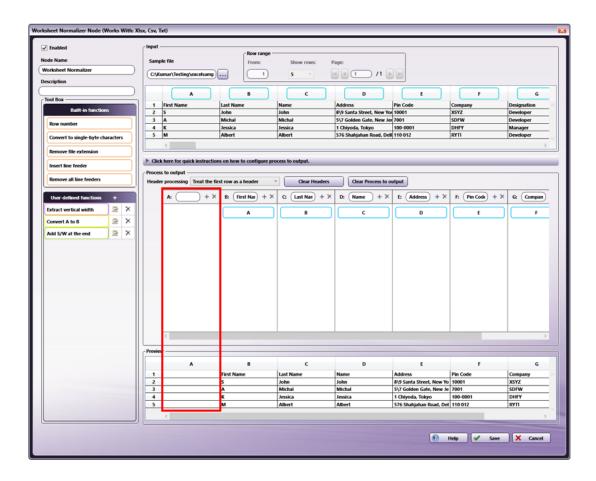
You can clear Items configured in the selected column by selecting **Clear column** from the context menu displayed by right-clicking the column header.

The case of adding a column to the left of column A

- 1. Right click on the header of column A
- 2. Click Insert column to left from the context menu



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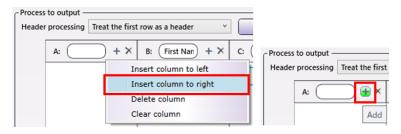


The case of adding a column to the right of column A

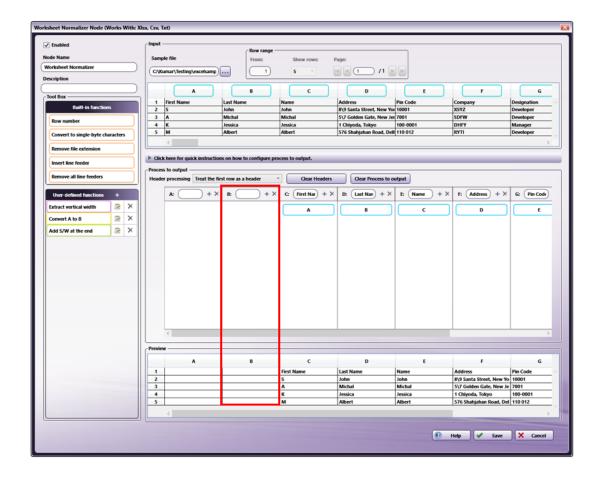
- 1. Right click on the header of column A
- $2. \quad \hbox{Click $Insert$ column to $right$ from the context menu}\\$

Or

Click on the **Add** button in the header of column A.



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Add / Edit / Delete Functions in Process to output area.

Items such as **Built-in functions**, **User-defined functions**, and **Column headers** in the Input table can be added to the **Process to output** table and configure it.

Built-in function and User-defined function when added to a column is applied to every cell in that particular column of Process to output table.

To add an Item to the **Process to output** table, select the function or the column ID to be added and drag-and-drop it to the desired column in the **Process to output** table.

The display location and order of the added items can be changed.

To change the display location or order of the added items, select the item and drag-and-drop to the desired location.

User-defined function added to the **Process to output** table can be modified directly by using mouse double click on selected User-defined function item in **Process to output** table.

To apply the added item to all the columns, right-click on the item and select **Apply item to all columns** from the context menu displayed. This will apply the settings of the selected item to all columns.

To delete the added item, right-click on the item and select **Delete item** from the context menu displayed. As an alternative, use keyboard "Delete" key to delete the selected item from **Process to output** table.

To delete item settings from all columns, right-click on the item and select **Delete item from all columns** from the context menu displayed. This allows item settings to be deleted from all columns.

For example:

1. Drag-and-drop the Insert line feeder from the Built-in functions area to column A in the Process to output area.

Worksheet Normalizer Node

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2. To apply the function to all columns, right-click on the function and select Apply item to all columns from the context menu.

Worksheet Normalizer Node

For example, when the selected function applied to all columns:

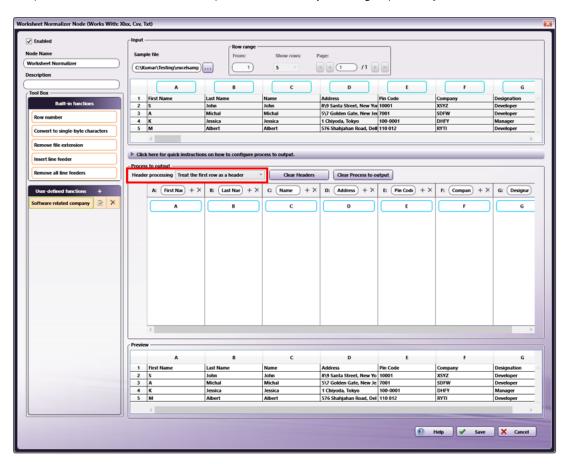
Worksheet Normalizer Node

Note: The total number of functions that can be set to the **Process to output** is up to 300. It is the sum of the functions set for all column cells. Column IDs are also included in the total. The maximum number of functions that can be set for each column is 10. If you try to add more than the maximum number of functions, an error message is displayed and cannot be added.

Worksheet Normalizer Node

Header Handling

Set up a method to handle headers of the output file in the **Header processing** drop-down. By default, this is **Treat the first row as a header**.



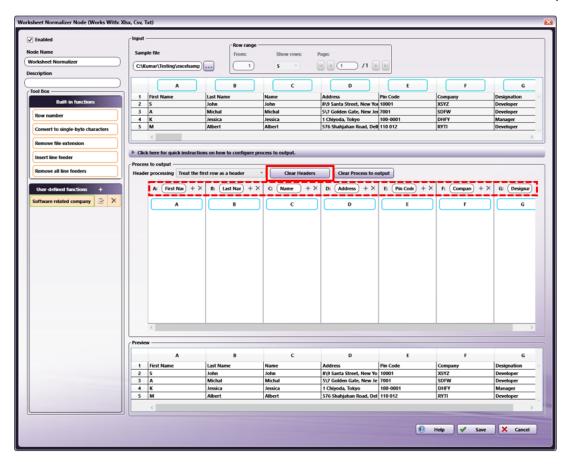
Function	Description
Treat the first row as a header	Edit the first row of the input file and use the edited row as the header for the output.
Add a new header at the beginning	Define a new first row for the input file, and use this newly defined row for the headers in the output. The existing first row will be treated as data and will be processed in the output.

Note: The header from the input file will not be the header used for the output of the file. The header of the generated output file will be the contents set in the header text within the "**Process to output**" *section of the configuration window.

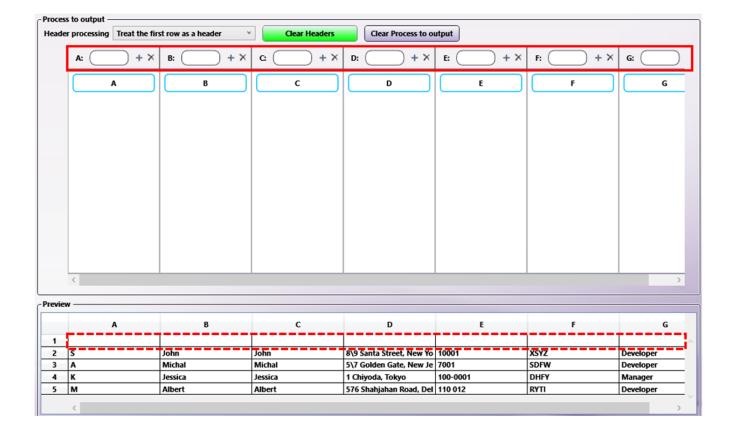
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Clear Process to output header

Click the Clear Headers button to clear the header text that has been entered in the header form in the Process to output area.



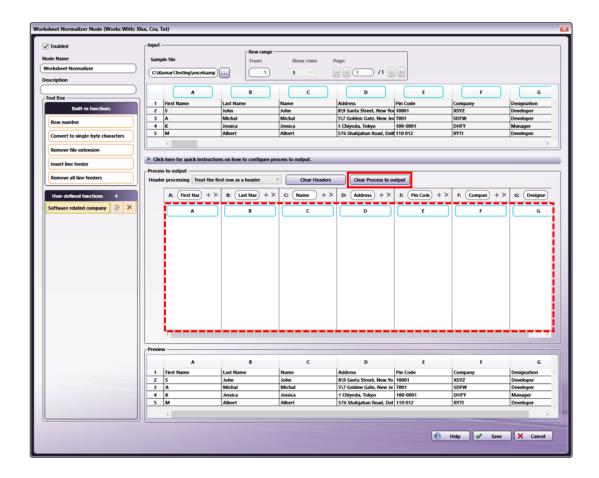
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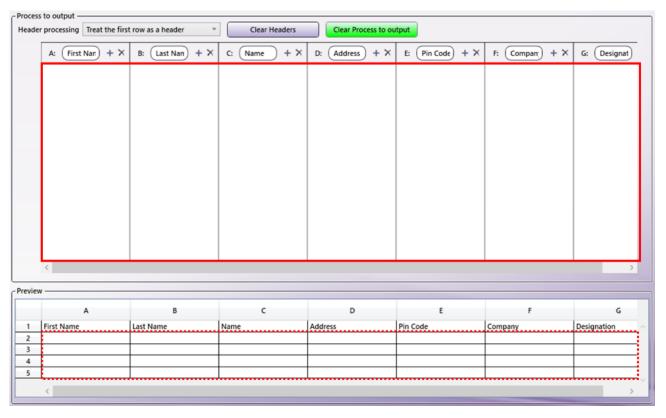
Clearing Configured Items in the Process to output area

To clear the items that have been configured in the **Process to output** area, click the **Clear Process to output** button.

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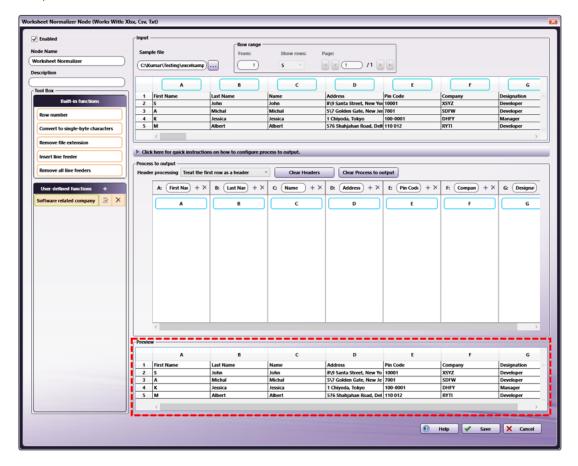
For example, when all items set in the ${\bf Process}\ {\bf to}\ {\bf output}$ area are cleared:



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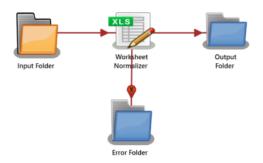
Preview

The **Preview** area displays a preview of the output result. Output result is generated by applying the configuration of the **Process to output** table to the input data.



- · Based on Show rows drop-down selection and Sample file data, the Preview table displays a preview data.
- · Preview data will only be displayed in the Preview table when an input file has been uploaded.

Sample Workflow with the Worksheet Normalizer Node



In this sample workflow, the **Worksheet Normalizer** node is configured to insert text strings to the specified cells of the input CSV file and generate a new file as an output.

The files collected from the **Input Folder** node are forwarded to the **Worksheet Normalizer** node. The files processed by the **Worksheet Normalizer** node are output to the **Output Folder** node.

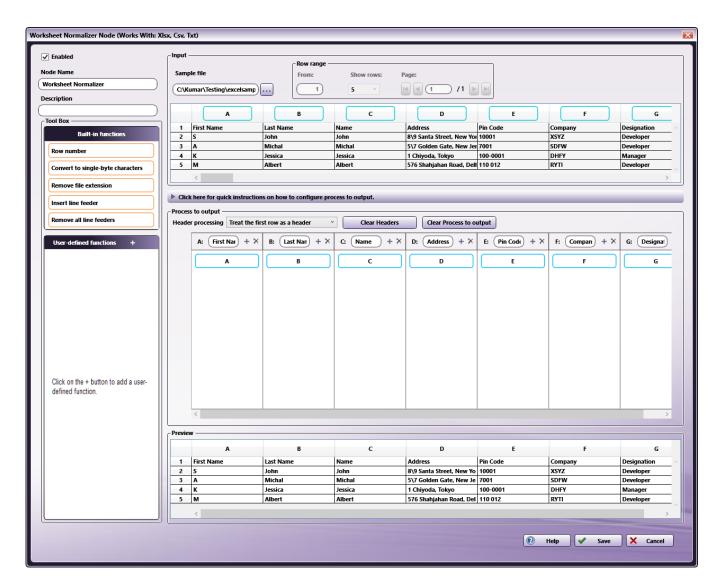
Input Folder: Configure the **Input Folder** to collect CSV, XLSX and TXT files from the **Input Folder** node and forward them to the **Worksheet Normalizer** node.

An example is shown below for processing the following CSV data. The CSV file is saved locally as "Worksheet_sampledata.csv."

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First Name,Last Name,Name,Address,Pin Code,Company,Designation S,John,John,"8\9 Santa Street, New York ",10001,XSYZ,Developer A,Michal,Michal,"5\7 Golden Gate, New Jersey ",7001,SDFW,Developer K,Jessica,Jessica,"1 Chiyoda, Tokyo ",100-0001,DHFY,Manager M,Albert,Albert,"576 Shahjahan Road, Delhi ","110 012",RYTI,Developer

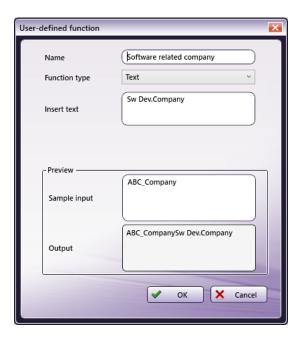
Worksheet Normalizer: Upload the sample file (Worksheet_sampledata.csv) to the Worksheet Normalizer node. During the upload, all the headers in the sample file will be copied to the **Process to output** table



Use the following procedure to process the file with the **Worksheet Normalizer** node. In this example, it is configured to add the string "Sw Dev.Company" as the type of company after the company name.

- 1. Click on ₹ in the **User-defined functions** header to create a user-defined function "Software related company".
- 2. Configure the "Software related company" function with the following details:

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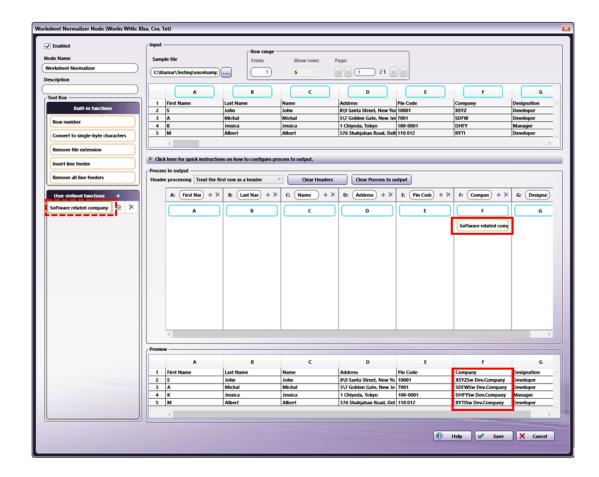
- Name: Enter "Software related company" as the name for the user-defined function.
- Function type: Select "Text" as the function type.
- Insert Text: Enter "Sw Dev.Company" as the text string to append to the output.
- Sample input: When a sample value is entered in the Sample input field, the output result applied the defined function will be displayed in the Output field. In this example, it is illustrated the case that "ABC_Company" is entered as an input value, and then the "Sw Dev.Company" will be appended to the input value as defined by the user-defined function.

3. Click the **OK** button.

The "Software related company" function will be added to the User-defined functions area.

Configure the **Process to output** table to append the string "Sw Dev.Company" to the values in the column "F" of Company data in the **Input** table as defined by the user-defined function created in the step 2. Drag-and-drop the "Software related company" from the **User-defined functions** area to column "F" (Company) in the **Process to output** table.

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Output Folder: Configure the **Output Folder** node, then save and validate the workflow. When the work-flow is executed, as shown below, a file is generated in which the text value "Sw Dev.Company" is appended after the cell values of the company name in column F of the input sample file as defined by the user-defined function in the **Worksheet Normalizer** node.

First Name,Last Name,Name,Address,Pin Code,Company,Designation S,John,John,"8\9 Santa Street, New York ",10001,XSYZSw Dev.Company,Developer A,Michal,Michal,"5\7 Golden Gate, New Jersey ",7001,SDFWSw Dev.Company,Developer K,Jessica,Jessica,"1 Chiyoda, Tokyo ",100-0001,DHFYSw Dev.Company,Manager M,Albert,Albert,"576 Shahjahan Road, Delhi ","110 012",RYTISw Dev.Company,Developer

Limitations

Important!

- Maximum file size supported by this Node is shown in below.
 - Preview output:
 - Up to 10,000 rows and 100 columns, as well as less than 10 MB in file size.
 - Workflow execution:
 - Up to 75,000 rows and 100 columns, as well as less than 30 MB in file size.
- Only UTF-8 encoding is supported for CSV and TXT files.
- The following limitations apply to XLSX files.
 - The XLSX file encrypted with password is not supported.
 - If there are multiple sheets in the XLSX file, only the leftmost sheet is processed and the other sheets is ignored.

VDP

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Note: This node works with XLSX and CSV files that contain up to 75,000 records. The CSV file must be in UTF-8 format.

VDP is a form of digital printing in which elements such as text, Image and Vector fields are merged/inserted into an input file. The **VDP Node** applies this process to any XLSX/CSV files it receives.

During workflow execution, this node will insert/merge elements (text, image, vector) into the original input document, and then output the merged file to the next node in the workflow. The node does the following:

- Input: A file is submitted to the node. This node supports only CSV or XLSX files. Additionally, the file cannot contain more than 75,000 records. If any file is submitted to the node that violates these limitations, the file will be routed to an ERROR outbound connector.
- **Process:** Once a valid VDP file is received, the node inserts the variable data and produces a single PDF, PDF VT, or PPML output format file. The type of file generated is specified using the node's settings.
- Output: A single PDF, PDF VT, or PPML output file with the variable data inserted is then sent on to the next node in the workflow.

Using the VDP Node

Add the VDP Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the VDP Node's window:



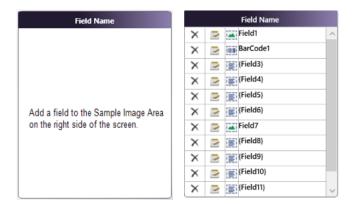
Use this window to specify the VDP Node's settings.

- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the VDP node.

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- In the **Description** field, enter a description for the VDP Node. This is not required, it can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In Measurement Unit panel, select a measurement unit radio button. Three types of measurement units are available: mm, inch, and point.
- In the General setting field, check the Match Case checkbox to enable case-sensitive recognition.
- Select the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- · Select the Help button to access online help.

Field Name



The **Field Name** panel lists the names of all the fields displayed in the current page **Sample Preview Panel**. Select an item in the Field Name list, the corresponding Field image will be selected in **Sample Preview Panel** and vice-versa.

Edit the Field using the Edit icon to the left of the list or by double-clicking on the field in the Sample Preview Panel.

Delete the Field using the Delete icon X to the left of the list. As an alternative, use keyboard "Delete" key to delete the selected Field.

Template

Use this setting to select, create, edit, or delete a Template:

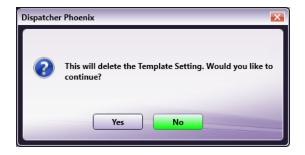


A list of saved templates is available from the drop-down. When a value is selected from the drop-down, the corresponding settings are loaded.

To save selected settings as a **Template**, add a **Template Name** after all settings are chosen.

- Add a New Template using the [+] Button: Click this button to open the New Template window. When prompted, enter a Template Name.

 The Template Name cannot exceed 100, alphanumeric characters. No special characters are supported. Use this option to save the current settings. The value is added to the drop-down and available for use.
- Delete a Template using the [-] Button: Select a value from the drop-down and then click this button. A confirmation pop-up opens:



Click **Yes** to delete the Template or **No** to cancel the request.

• Edit a Template: Select the Template then click the [+] button. Modify the changes, as required. By default, the Template Name value will default to Untitled. To keep the original name, re-enter the old value by replacing Untitled. When finished, click the OK button. If the old name was reentered, an overwrite verification pop-up opens. In it, click Yes to overwrite the old values.

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Notes:

- Templates are specific to each install.
- A maximum of 100 **Templates** may be saved. When the **Template** count reaches 100, new addition to **Template** is not allowed and following error message will be displayed to user.



- If a Template value other than Default is selected when the node opens, the Template drop-down displays a value of saved Template
 name if the saved Template is not deleted/modified by other VDP node in a workflow.
- If a **Template** value other than **Default** is selected and it is already deleted/modified when the node opens, the **Template** drop-down displays a value of [-].
- If a Template value is modified while the node is open, the Template drop-down displays a value of [*Untitled+].
- Template name can be a combination of any of the below characters.
- One byte characters [English characters etc.] (a to z & A to Z)
- Double byte characters [Japanese, Chinese Characters etc.]
- Spaces
- Numbers(0 to 9)

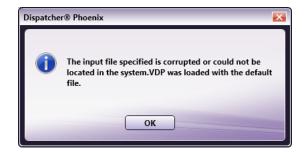
Input File



- **Upload Button:** Use this to upload an input file. Text, Image, and Vector fields are merged/inserted into the input file. The Input File field supports the following formats: **PDF**, **JPEG**, **GIF**, **PNG**, **BMP**, **TIFF**. Once the input file is selected, the path appears in the **File Path** field. As an alternative, user can manually input the file path of input file to be uploaded.
- Enter Network Credentials Button: If the entered file path is on a network that requires user credentials, click the button, and then enter the required values.

Note: If the selected input file cannot be located, a default **Template** file is loaded when the VDP Node opens. As well, workflow validation will fail due to this issue.

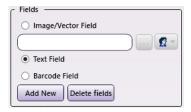
A pop-up message provides an alert if this situation occurs. To resolve this, upload a new file.



Fields

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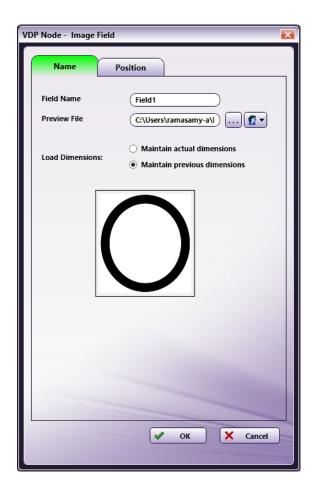
A new Image/Vector Field or Text Field may be added. These additions are applied to files that are processed through the node.



Image/Vector Field Option

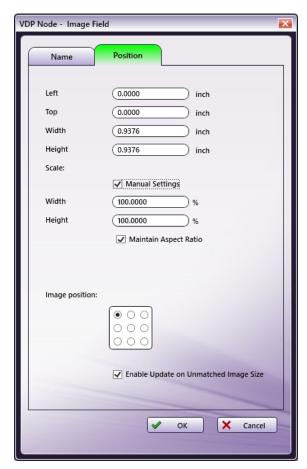
When an **Image Field** is added, **Image/Vector** data from the variable data file (XLSX/CSV) is inserted. When a **Vector Field** is added (vector here refers to the PDF file), the variable data contains a path to the image/PDF file and the content of that file is inserted in the place of the newly added **Image/Vector** field.

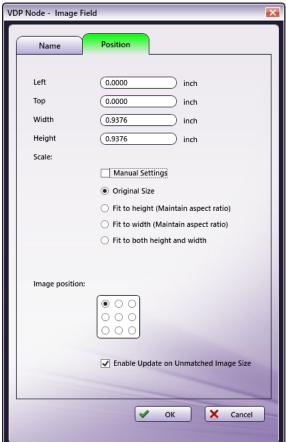
- 1. Click the Add New button. The VDP Node Image Field pop-up opens.
- 2. Click the Name Tab to open it. Use this tab to specify details about the Field Name and the Preview File.
 - Field Name: A running number is appended to the Field, e.g., Field 1, Field 2. This field can contain only alphanumeric values and spaces.
 - **Preview File:** Click the ellipses (...) button to upload a new **Preview File**. As an alternative, user can manually input the file path of **Preview File** to be uploaded.
 - Load Dimensions:
 - Maintain actual dimensions: When uploading a new preview file by clicking on ellipses (...) button, new preview will be loaded with actual/original dimensions.
 - Maintain previous dimensions: When uploading a new preview file by clicking on ellipses (...) button, new preview file will be loaded with previous/existing dimensions.



3. Click the **Position Tab** to open it. Specify the position where the field is shown. There are four options: **Left, Top, Width, and Height** for Field scaling and two options: **Scale and Image position** for Image scaling inside the field.

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- 4. Scale includes below options:
- Manual settings:
 - Manual settings (Checked): Allows to specify scaling Width/Height in terms of percentage. Original image will be scaled to defined Width/Height percentage.

If the Maintain Aspect Ratio checkbox is selected, any change in one of the values will be automatically applied to the other values.

· Manual settings (Unchecked): Select one of four options: Original Size, Fit to height, Fit to width, Fit to both height and width.

Original Size: Image will be displayed with original dimensions.

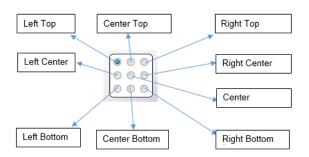
Fit to height: Stretch the image to fit the height of the field area.

Fit to width: Stretch the image to fit the width of the field area.

Fit to both height and width: Image fills the field area and no aspect ratio will be maintained.

5. Image position: Allows to align image in different positions with respect to field: LeftTop, CenterTop, RightTop, LeftCenter, Center, RightCenter, LeftBottom, CenterBottom, RightBottom.

If image dimensions are greater than field dimensions, excess part of image will not be shown.



6. **Enable Update on Unmatched Image Size:** When the checkbox is selected, the VDP Node routes input files to an error folder if the image size does not match the size specified on the **Position Tab**. When unselected, the node ignores such errors and continues to process the file

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without routing it to an error folder.

- 7. Once the settings are specified, save the values by clicking the **OK** button. If **Cancel** is clicked, no changes are saved. If **OK** is clicked, the settings specified are then displayed in the **Preview** area of the VDP Node window.
- 8. To **Delete** the settings, click the **Delete Fields** button. A confirmation pop-up opens:



9. Click Yes to delete all field values or No to cancel the request.

Notes

- At least one field must be added to save the changes. A maximum of 20 fields per page are allowed as well as a maximum of 100 Fields for
 a single setting. When either of these values are exceeded, a warning pop-up opens stating that the field will not be added.
- Refer to the XLSX/CSV Input Data Configuration section later in this document for a sample illustration of variable data and UI configuration.

PDF Image Handling

The VDP Node inserts the vector image (PDF image) as noted below:

- The backend determines whether to insert the whole PDF page or just the image inside the PDF.
- The backend supports the insertion of one PDF page (but not multiple PDF pages).

Text Field Option

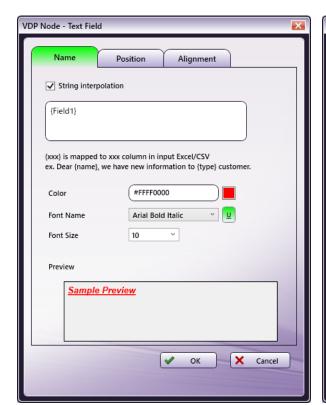
When a **Text Field** is added, **Text Field** data from the variable data file (XLSX/CSV) is inserted.

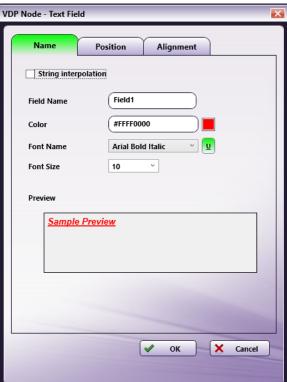
- 1. Click the Add New button. The VDP Node Text Field pop-up opens.
- 2. Click the Name Tab to open it. Use this tab to specify details about the Field Name.
 - **String Interpolation:** When String interpolation is checked, field name can be given as a formatted string, e.g.. Dear {StudentName}, this is to certify that you have successfully completed {CourseName} on March 2017.

Notes:

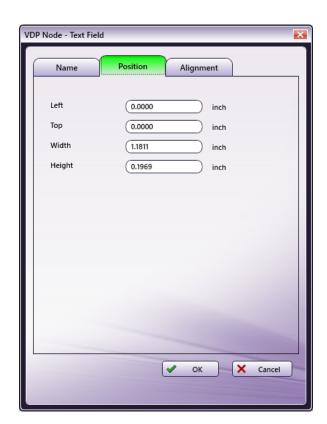
- In the above mentioned example {StudentName} and {CourseName} are variable fields.
- If formatted string has only right-to-left characters (e.g. Arabic character), the **Field Name** should also have the same type of font, i.e., should not contain left-to-right characters (e.g. English character).
- When String interpolation is unchecked, Field Name need to be mapped.
- When setting a Barcode Field, you can link it to the Text Field name registered without checking String Interpolation.
- Color: This is a read-only field that displays the text value of the Color. Click the color selection option, and then select a color value.
- Font Name: Select a value from the drop-down. The drop-down lists all available system fonts. Click the icon to add underlining to the text value.
- Font Size: Select a value from the drop-down. Decimal values are supported.
- **Preview:** A real-time image displays the selected settings.

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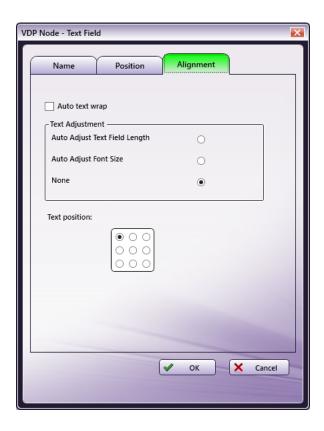


3. Click the Position Tab to open it. Specify the position where the text field is shown. There are four options: Left, Top, Width, Height.



4. Click the Alignment Tab to open it. Use this tab to specify alignment details for the Field Name/ Interpolated String.

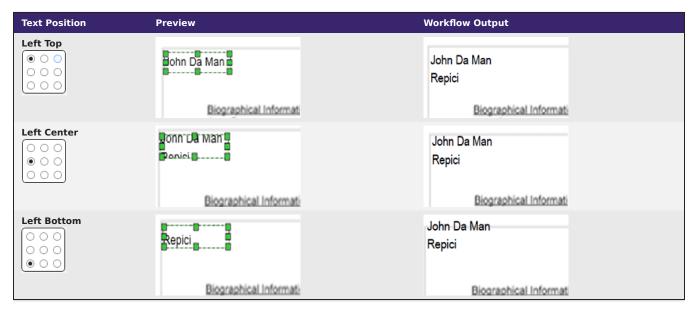
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- 5. Auto text wrap: Check/ Uncheck to wrap text. When Auto text wrap is ON then Text will only wrap if there are spaces present in the given text.
- 6. Text Adjustment: Select one of three radio buttons: Auto Adjust Text Field Length, Auto Adjust Font Size, or None.
- Auto Adjust Text Field Length: Dimensions (Width or Height) of the Text Field will be adjusted to fit the given text in the output file. When Auto text wrap is checked, height of the Text Field will be adjusted. When Auto text wrap is unchecked, width of the Text Field will be adjusted.

Note: The text displayed in Preview area will not match the output, when the text given in Input XLSX or CSV file does not fit within the dimensions of **Text Field**. Especially when the user wants to verify the output in Preview area using some variable data, the following difference could occur.

Auto Adjust Text Field Length - ON & Auto text wrap - ON:



Auto Adjust Text Field Length - ON & Auto text wrap - OFF:

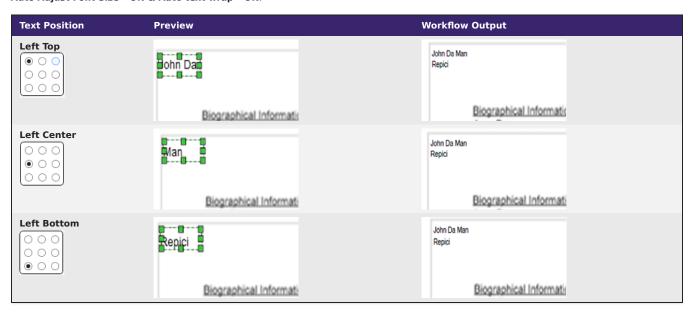
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Text Position	Preview	Workflow Output
Left Top O O O O O O O O O O O O O O O O O O O	dohn Da Man d	John Da Man Repici
	Biographical Information	Biographical Informati
Center Top		
000	in Da Man Rei	John Da Man Repici
	Biographical Informatic	Biographical Information
Right Top O O O	Da Man Repion	ohn Da Man Repici
	Biographical Informati	Biographical Informati

• Auto Adjust Font Size: Font size of the text will be adjusted to fit the given text in the output file. Dimensions (Width and Height) of **Text Field** will not change.

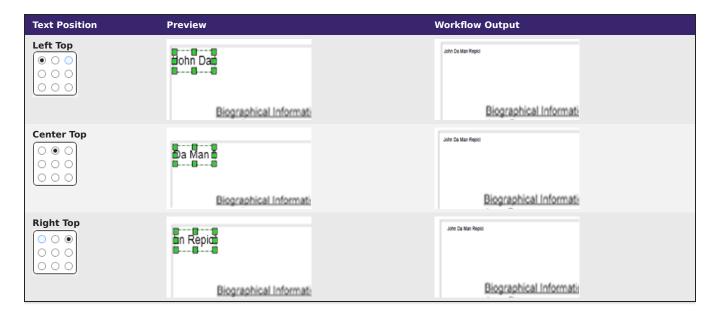
Note: The Font size of text displayed in Preview area will not match the output, when the text given in Input XLSX or CSV file does not fit within the Text Box with the given Font size in UI. Especially when the user wants to verify the output in Preview area using some variable data, the following difference could occur.

Auto Adjust Font Size - ON & Auto text wrap - ON:

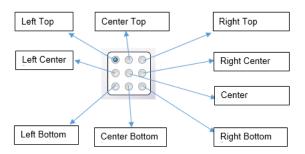


Auto Adjust Font Size - ON & Auto text wrap - OFF:

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7. Text position: Allows to align text in different positions with respect to field: LeftTop, CenterTop, RightTop, LeftCenter, Center, RightCenter, LeftBottom, CenterBottom, RightBottom.



- 8. Once the settings are specified, save the values by clicking the **OK** button. If **Cancel** is clicked, no changes are saved. If **OK** is clicked, the settings specified are then displayed in the **Preview** area of the VDP Node window.
- 9. To **Delete** the settings, click the **Delete Fields** button. A confirmation pop-up opens.



10. Click **Yes** to delete all field values or **No** to cancel the request.

Notes:

- At least one field must be added to save the changes. A maximum of 20 fields per page are allowed as well as a maximum of 100 Fields for
 a single setting. When either of these values are exceeded, a warning pop-up opens stating that the field will not be added.
- Refer to the XLSX/CSV Input Data Configuration section later in this document for a sample illustration of variable data and UI configuration.

Barcode Field Option

When a Barcode Field is added, Barcode data from the variable data file (XLSX/CSV) is inserted.

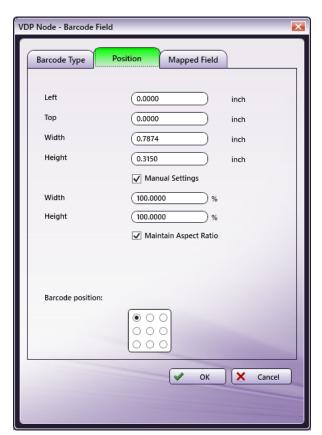
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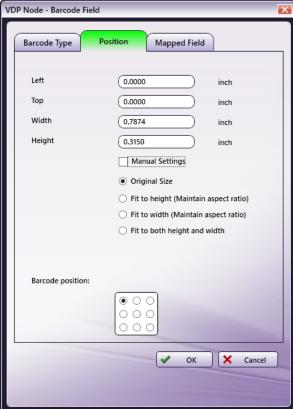
- 1. Click the **Add New** button. The VDP Node **Barcode Field** pop-up opens.
- 2. Click the **Barcode Type Tab** to open it. Use this tab to specify details about the **Barcode Type**.
 - Category: Select the barcode Category from the drop-down.
 - $\bullet \ \ \, \textbf{Type:} \ \, \textbf{Select a barcode} \ \, \textbf{Type} \ \, \textbf{that supports the selected} \ \, \textbf{category} \ \, \textbf{value from the drop-down}. \\$
 - **Preview:** A real-time image displays the selected settings.



3. Click the **Position Tab** to open it. Specify the position where the barcode is shown. There are four options: **Left, Top, Width, Height** for Field scaling and two options: **Manual Setting [Check/Uncheck] and Barcode position** for Barcode scaling inside the field.

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· Manual settings:

 Manual settings (Checked): Allows to specify scaling Width/Height in terms of percentage. Original image will be scaled to defined Width/Height percentage.

If the Maintain Aspect Ratio checkbox is selected, any change in one of the values will be automatically applied to the other values.

· Manual settings (Unchecked): Select one of four options: Original Size, Fit to height, Fit to width, Fit to both height and width.

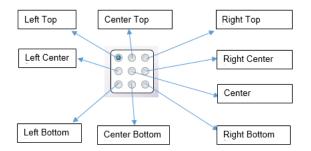
Original Size: Image will be displayed with original dimensions.

Fit to height: Stretch the image to fit the height of the field area.

Fit to width: Stretch the image to fit the width of the field area.

Fit to both height and width: Image fills the field area and no aspect ratio will be maintained.

4. Barcode position: Allows to align image in different positions with respect to field: LeftTop, CenterTop, RightTop, LeftCenter, Center, RightCenter, LeftBottom, CenterBottom, RightBottom. If image dimensions are greater than field dimensions, excess part of image will not be shown.



- 5. Click the Mapped Fields Tab to open it. Use this tab to specify Barcode Mapping details.
 - Available Fields: Select registered Text Field Name or Custom from the drop-down.
 - Custom Field Name: Enter the Name that will be used to map the field during barcode processing.

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- 6. Once the settings are specified, save the values by clicking the **OK** button. If **Cancel** is clicked, no changes are saved. If **OK** is clicked, the settings specified are then displayed in the **Preview** area of the VDP Node window.
- 7. To **Delete** the settings, click the **Delete Fields** button. A confirmation pop-up opens.



8. Click **Yes** to delete all field values or **No** to cancel the request.

Notes:

- During workflow execution, if non-supported barcode data is found in the VDP file the node displays an error message in the Activity Log of the workflow and the file is moved to the Error Folder.
- Refer to the Barcode Data Input Formats section later in this document for a list of the supported Type/Format options.

Copy/Paste/Replace

Using the right-click context menu, the **Copy** and **Paste** options can be used to add fields inside the **Preview** panel. When **Copy** is clicked, the settings of the currently selected field are copied.

When **Paste** is clicked, the copied field will be pasted in the selected field. Any changes made to the original field after the **Copy** operation has been completed are not applied to the copied version.

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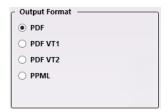




When Replace is clicked currently selected field will be replaced with copied field. Replace will be enabled only if a single field is copied.

Output Format

In the Output Format section, choose the format for the output file. There are four options: PDF, PDF VT1, PDF VT2, or PPML.



Notes:

- PDF VT1 and PDF VT2 are special PDF formats. These types of files are assigned the PDF extension.
- The following metadata will be added at the file-level for all PDF VT2 output format:
- pdfvt2:content (to route content files)
- pdfvt2:reference (to route image files)
- For **PDF VT2** output format, VDP Node produces UI **Input File** and variable data file as separate PDF files as workflow output. Please refer **Limitations** section for more information.
- To integrate and print the PDF VT2 output file, use the print system that support PDF VT2 format. For example, AccurioPress C6100 IC-604.

Page Navigation and Zoom

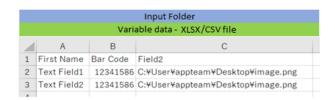
Navigate through the pages of the input file and control the **Zoom** ratio by using these functions, located at the bottom of **Preview** panel:



- Page Navigation: Click on the arrows to navigate through multiple pages of the sample document (when available).
- Zoom Control: Use either the sliding bar or input a numeric value to Zoom in and out of the Preview panel.

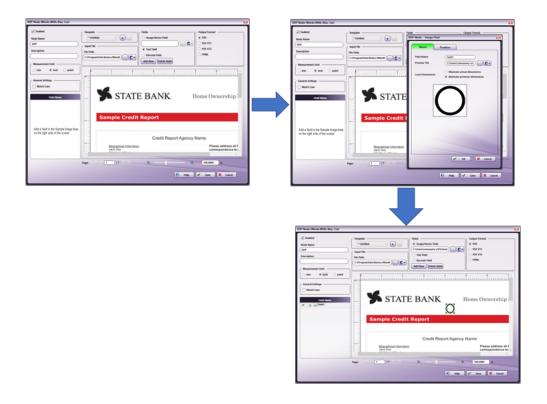
XLSX/CSV Input Data Configuration

1. An input folder may be configured using variable data as noted in the example below

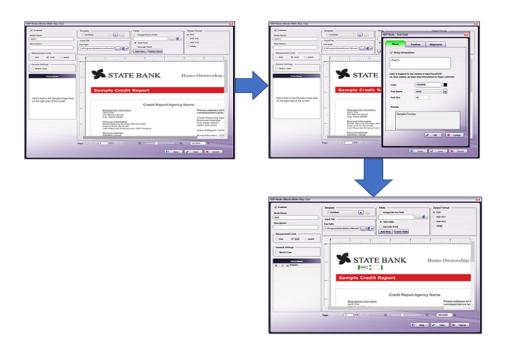


- 2. Drag and drop the VDP Node and configure the **Field Settings** as noted in the UIs below:
 - Image/Vector Field setting in UI

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Text Field setting in UI



 $\circ~$ Bar Code Field setting in UI

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- 3. Using the VDP Node settings, 3 **Image/Vector** fields were added in the processes noted above. When a VDP + PDF/image file is moved to the node, data to fill these **Image/Vector** fields are pulled from the VDP file and added to the document.
- 4. The following output is generated:



5. This single PDF, PDF VT, or PPML file is then moved on to the next node in the workflow.

Notes:

 $\circ~$ If the input file is PDF, Image/Vector Field Types will only support a one-page PDF file.

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• Refer to the Barcode Data Input Formats section that follows to configure data input formats for Variable Data.

Barcode Data Input Formats

The barcode types and data input format supported by the VDP node are noted below:

Note: If the selected barcode **Type** requires a **Check Digit** value, the input data must include this value (relevant values noted in the table that follows):

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Category	Туре	Data input format	Check Digit
Linear codes	Code 128	ABC-abc-1234	
	Code 11	0123-45678-	Yes (2 digits)
	Code 2of5 Interleaved	1234567890	
	Code 39	ABC-1234	
	Code 39 Full ASCII	Aa-1234	
	Code 93	ABC-1234-/+aC	Yes (2 digits)
	Flattermarken	123456789	
	GS1 128(UCC/EAN-128)	[01]98898765432106[3202]012345[15]991231	
	MSI	012345674	Yes (1 digit)
	Pharma 1 Track	123456	
	Pharma 2 Track	123456	
	Telepen	ABC-abc-1234	
PostalCodes	DAFT	DAFTFDATATFDTFAD	
	Japanese Postal	1234567	
	Korean	1234569	
	Planet Code	123456789014	Yes (1 digit)
	Royal Mail	1234567ABCM	Yes (1 digit)
	Postnet 6	123455	Yes (1 digit)
	Postnet 10	1234567895	Yes (1 digit)
	Postnet 12	123456789014	Yes (1 digit)
GS1 DataBar	GS1 Databar	01234567890128	Yes (1 digit)
	GS1 Databar Stacked	12345678901231	Yes (1 digit)
	GS1 Databar Stacked Omni	12345678901231	Yes (1 digit)
	GS1 Databar Limited	01234567890128	Yes (1 digit)
	GS1 Databar Expanded	[01]90012345678908[3103]001750	Yes (1 digit)
	GS1 Databar Expanded Stacked	[01]98898765432106[3202]012345[15]991231	Yes (1 digit)
	GS1 128 Composite	[01]01234567890128&&[10]1234567ABCDEFG	Yes (1 digit)
	GS1 Databar Composite	12345678901231&&[11]990102	Yes (1 digit)
	GS1 Databar Stacked Limited Composite	12345678901231&&[17]010200	Yes (1 digit)
	GS1 Databar Expanded Composite	[01]01234567890128[3103]001234&&[91]1A2B3C4D5E	Yes (1 digit)
EAN/UPC	EAN 8	90311017	Yes (1 digit)
	EAN 13	9780201379624	Yes (1 digit)
	EAN 8 Composite	76543210+54321	Yes (1 digit)
	EAN 13 Composite	2109876543210+54321	Yes (1 digit)
	UPC A	725272730706	Yes (1 digit)
	UPC E	01234565	Yes (1 digit)
	UPC A Composite	123456789012+12345	Yes (1 digit)
	UPC E Composite	12345670+54685	Yes (1 digit)
2D BarCodes	QR Code	123456ABDC	
	Data matrix	123456ABDC	
	Aztec	123456ABDC	
	Maxicode	123456ABDC	
	Micro PDF	123456ABDC	
	PDF 417	123456ABDC	

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Category	Туре	Data input format	Check Digit
	Micro QR	ABC-abc-1234	
ISBN Codes	ISBN 13	9781234567897	Yes (1 digit)

Limitations

Important!

- 1. Transparency is only supported when both the input file and the **Image Field** variable data are in PDF format. The transparent portion is displayed as white in the preview.
- 2. If a multi-TIFF file containing variable data is submitted to an **Image Field**, only the data from the first page is inserted into the output. The other page data is ignored.
- 3. An **Image Field** only supports a single-page PDF file. If a multi-page PDF is submitted to an **Image Field**, the VDP Node displays an error message.
- 4. The text box of the VDP UI may allow invalid/lengthy input. Click off the field and Dispatcher will auto-correct such entries by truncating them to either the minimum or the maximum value of characters the text box supports. This is the default behavior of the application.
- 5. The VDP Node will not support a mixed page size Template file.
- 6. A multi-Tiff file with JPEG compression is not supported in VDP node because the PoDoFo library for PDF manipulation does not support this file.
- 7. The VDP Node cannot process multi-line text for the **Text Field** so it should not be included in the XLSX/CSV file.
- 8. The VDP node cannot support text Transparency, since the PoDoFo functionality cannot properly preserve the graphic state of the text to render its transparency.
- 9. The VDP node supports a maximum input of 110 MB (for all variable data files and Template files).
- 10. The VDP Node can support up to a 100 page Template; however, there are restrictions to the input record and the output page support. The table

Template Page Count **Excel Records** Total Page support 75000 75000 75000 2 37500 5 15000 75000 75000 10 7500 1500 75000 50 100 75000 750

that follows provides specifics:

Note: Page Support = Template Page Count. Records should be less than or equal to 75,000 pages.

- 11. The current Version of VDP writes to the ENVIRONMENT variable for ZINT library dependency. A restart is required after the installation of VDP to perform Barcode insertion correctly.
- 12. For composite data, variable data should contain primary data and other data combined by &&. Since && is used to combine data, any primary data/other data that contains && will not be processed correctly.
- 13. If the input Check Digit value is invalid, the value is automatically corrected by the ZINT library. This will cause the output to be different from the input.
- 14. The VDP library only accepts CR+LF or LF as newline code. If CR is used as newline code, this code must be converted to one of the supported values using conversion software.
- 15. Template files must be PDF version 1.3 and above.
- 16. Text wrap in text field can be applied only of the string contains a space in between.
- 17. Replace is applicable only when a single field is copied.
- 18. VDP doesn't support format of date/time/currency or etc. of XLSX file cell.
- 19. Variable data PDF file produced in PDF VT2 format is applicable only to Image Field type configured. Text Field and Barcode Field variable data is directly embedded to Input File and produced as output PDF.

Distribution Nodes

Connectors

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3rd Party Connectors

Dispatcher Phoenix offers a number of connectors to third-party applications, including:

- Box.com
- DocRecord
- DocuSign
- Dropbox
- Epic
- FileAssist
- FilesAnywhere
- Google Drive
- Guardian
- OnBase Content Management System by Hyland Software
- Laserfiche
- M-Files
- Microsoft Exchange
- Microsoft OneDrive
- Microsoft OneDrive for Business
- Microsoft Teams Connector
- Paragon Cloud Fax
- RightFax
- · SharePoint by Microsoft Corporation
- · SharePoint Online by Microsoft Corporation
- Upland InterFAX
- WebDAV server
- Windows Fax
- Workshare
- Worldox

Note: When creating your workflow, make sure that your output nodes are enabled. If files are sent to a disabled output node, they will be lost.

Proxy Settings

Dispatcher Phoenix can honor proxy settings for the FilesAnywhere, FilesAssist, Dropbox, Box, OneDrive, OneDrive for Business, Google Drive, OnBase, SharePoint, SharePoint Online, and WebDAV connectors. To set up for proxy settings on the system that is running Dispatcher Phoenix, do the following:

- Configure the proxy from Internet Explorer (Tools > Internet Options > Connections > LAN Settings). Please consult the IT specialist for information on how to configure proxy settings for both external access and proxy bypass addresses.
- 2. Configure the proxy for Dispatcher Phoenix using the DP Web System Settings Application

Note: SharePoint and WebDAV do not support NTLM/Negotiate authentication with a proxy server that requires authentication.

Box Connector



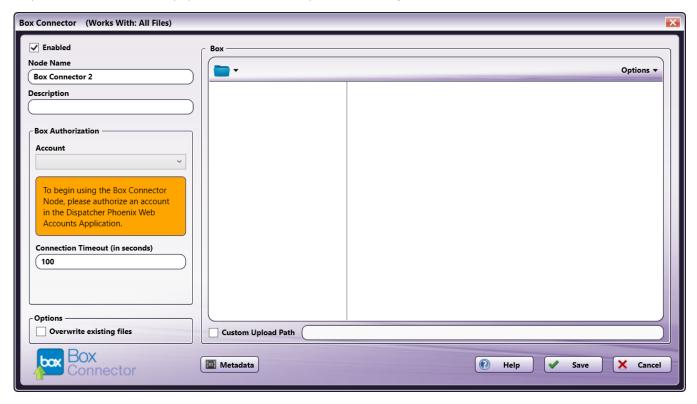
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The Box Connector node allows you to distribute documents to Box.com, an online file sharing and Cloud content management service for businesses. Documents can be sent to Box via an automated workflow, or you can log into Box directly at the MFP panel.

Notes:

- To use the Box Connector, you must have a Box account.
- The maximum file size for uploading documents to Box is 200 MB.

To open the Box Connector Node properties window, add an output node for Box to your workflow and double-click on it.



- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the Box Connector node.
- In the **Description** field, enter a description for the Box Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- When the **Overwrite existing files** box is checked it will allow you to upload the same file more than once to your Box.com account. The file will have an icon next to the file name with a number representing the number of times that file has been uploaded, clicking on that icon will show the other versions of that file. This functionality is only available from Box.com with an account level of "Pro" and higher, standard Box account users will not be able to view file versions.

Configuring the Box Connector

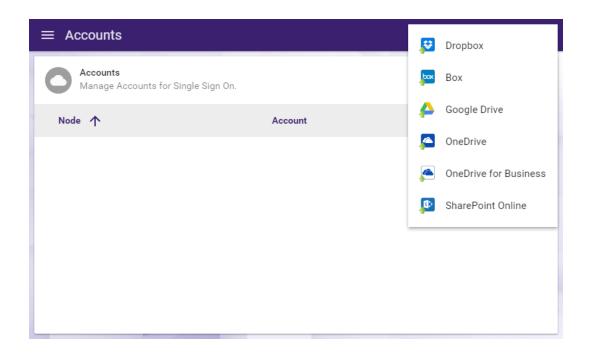
To configure the Box Connector, you must first log into your Box account via Dispatcher Phoenix Web's Authentication Manager. Once this initial set up is completed, logging into Box within the node or at the MFP panel is no longer necessary, providing an optimized single sign on experience.

Set Up

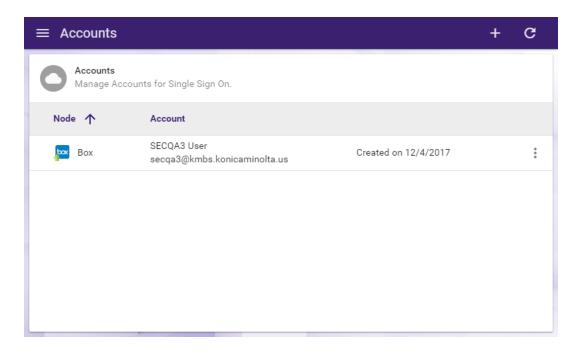
To begin, you must first log into Box via the Dispatcher Phoenix Web's Authentication Manager. Do the following:

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the **Accounts** tool on the Home page.
- 3. On the Accounts page, select the + button and choose the **Box** option. See the following illustration:

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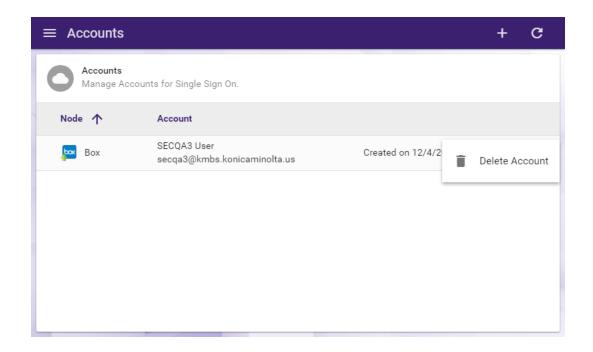


- 4. Log into Box using your account credentials (email address/Box account username and password).
- 5. Select **Yes** if asked for permission to let the application access your info.
- 6. The Box account will now be listed on the Accounts page. See the following illustration for an example:



7. If you need to delete the account, select the vertical ellipsis button and choose **Delete Account**, as in the following illustration:

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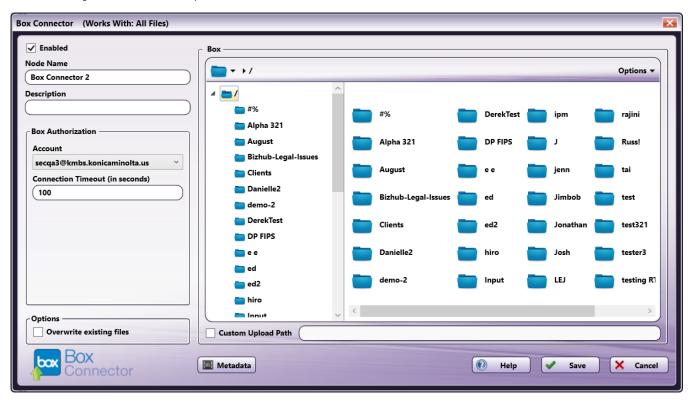


8. If you add multiple accounts, the first account you added will be marked as the Primary Account with a star icon. The benefit of a primary account is that when you sign into the MFP, you will have immediate access to this account. You can switch to a different account at the MFP by selecting the check icon, then selecting the back arrow icon on the next screen. You can also switch your primary account by selecting the vertical ellipsis button and selecting **Enable Primary Account**. You can also **Disable Primary Account** to always be prompted with the account screen at the MFP.

Customizing the Box Connector Node

Once connected, the right hand side of the Box node properties window displays a tree-view of your folders, sub-folders, and files in Box. You can use this area to browse through your Box folder structure and choose a folder to store your documents in.

See the following illustration for an example:



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To choose another Box account, choose the account from the Account drop-down list.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Sending Documents to a New Folder

To create a new folder in Box to scan to, select the New folder option from the Options drop-down menu or press Ctrl + Shift + N.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view.

Sending Documents to a Custom Path Using Metadata

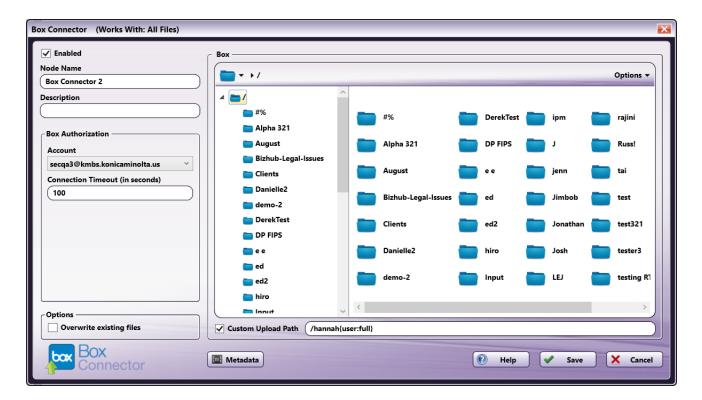
You can also upload documents automatically to a folder that is defined in the Box node's configuration window. To get started, do the following:

- Check the Custom Upload Path box: Enter the folder path that your scanned documents are uploaded to. You can create a new folder dynamically by entering the name of the folder you want created.
- This path name can also include metadata, if necessary. Folders will be created if the path does not already exist.

Note: You cannot create a folder within a folder that does not already exist. For example, you cannot use two different metadata variables to create a folder within a folder (e.g., {bates:Counter}/{file:name}).

- To add metadata to the custom upload path, do the following:
 - 1. Click on the Metadata button to open up the Metadata Browser.
 - 2. On the Metadata Browser window, select the metadata variable you are interested in.
 - 3. Drag-drop the metadata variable from the Metadata Browser window to the Custom Upload Path field.

See the following illustration for an example:



File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)

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• Do not use < > : " / \ | ? *

View Options

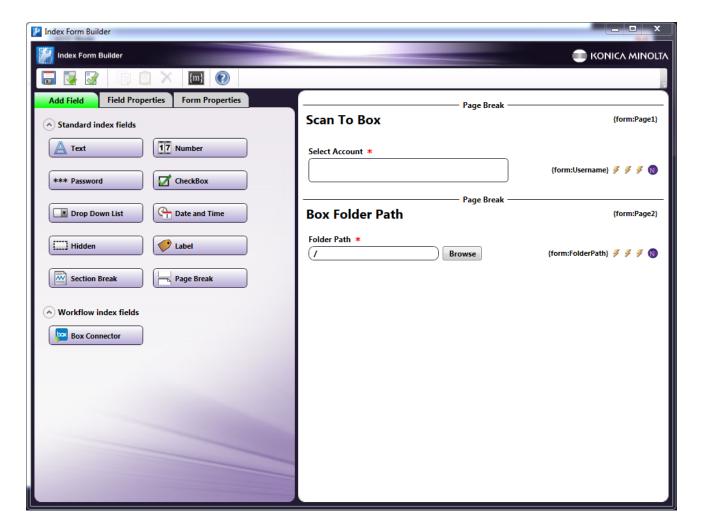
You can adjust the default view of your Box folders in the node properties window by using the Options button on the top right hand side of the window. Choose the following items from the Options pull-down menu:

- To turn off the default view, uncheck the **Show tree view** option or press **Ctrl + T**.
- To hide the files stored in Box folders, uncheck the Show files option or press Ctrl + E.
- To refresh the current view with the most up-to-date folders/files, select the Refresh option or press F5.

Creating a Box Connector Index Form

You can create an index form that allows you to log into Box automatically at the MFP. Do the following:

- 1. Make sure that you have logged into Box from Dispatcher Phoenix Web's Account Manager.
- 2. Make sure that your workflow includes a MFP Panel node and Box Connector node.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a Box Connector button under the Workflow Index Fields area.
- 4. Drag and drop the **Box Connector** button to the Index Form work area. A Scan to Box index form will automatically appear, as in the following illustration:



- 5. Save and close the Index Form Builder.
- 6. The Box Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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Box Index Form on MFP

At the MFP, the Box Index Form will appear as follows:

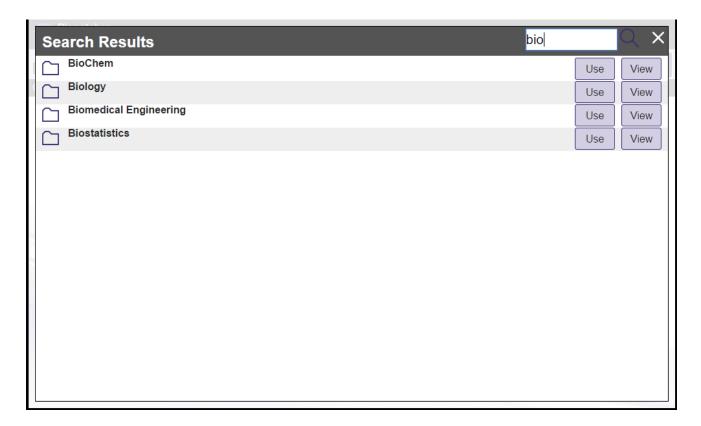


A **Search** field is provided for you to use to narrow the list of folders. This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly. The search operation will be conducted on any folders and sub-folders within the root directory.

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Notes:

- Wildcard characters (*, %) are not supported.
- Box search matches from the beginning of the item name.
- If a file or folder name is a compound word using CamelCase (e.g., "MyFolder") or the file or folder name contains spaces (e.g., "My Folder"), the search will be conducted on the separate word components (e.g., "My" and "Folder"); otherwise the search will be conducted on the entire name (e.g., A search on "folder" will not return the "Myfolder" folder).



Once the folder list is filtered per your search, you can do the following:

- $\circ~$ Tap on the Use button to select that particular folder.
- $\circ~$ Tap on the View button to return to a directory structure view of that particular folder.
- \circ Release the filter by tapping on the ${\bf X}$ button next to the Search field.
- Tap on the **Search** icon next to the field to submit the search criteria again.

Database Browsing - Box Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from Box.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose Box Data Source from the Query drop-down list.
- 4. The Box Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Box.

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Do the following:

- In the **Friendly Name** field, enter an identifying name for the Box data source configuration.
- In the Action area, you can choose what kind of action to perform on the Box data source. Options include:
 - Get Primary Box Account This option returns the primary Box account for the user.
 - Get Box Accounts This option returns all the Box accounts for the user.
 - **Get Box Folders** Use this action to display a list of folders within a specific Box Folder Path. When you select the Get Box Folders item, new fields will appear for configuration, as in the following illustration:



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- Folder Path Enter the folder ID of the Box root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new Box folder at the MFP.
 - Show files Check this option to display files in Box folders at the MFP.

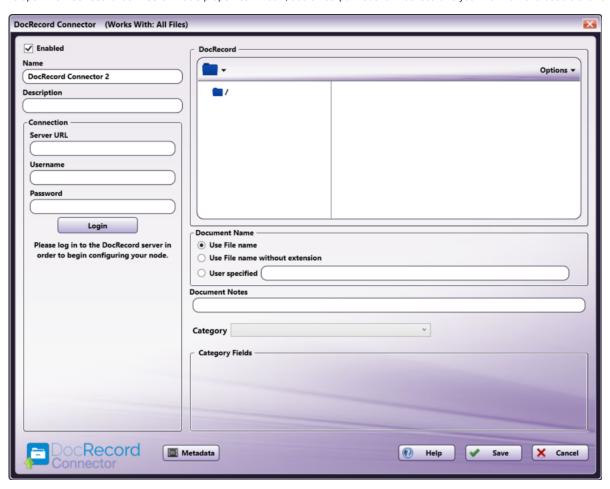
DocRecord Connector



The DocRecord Connector node allows you to distribute documents to DocRecord, a popular ECM service. Documents can be sent to DocRecord via an automated workflow, or you can log into DocRecord directly at the MFP panel.

Note: To use the DocRecord Connector, you must have a DocRecord account.

To open the DocRecord Connector Node properties window, add an output node for DocRecord to your workflow and double-click on it.



- **Enabled** To enable this node in the current workflow, ensure the **Enabled** box is checked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it. While the workflow will still validate, documents will not be output and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.

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• **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Connecting to DocRecord

To begin, you must first connect to the DocRecord Server. In the Connection area, do the following:

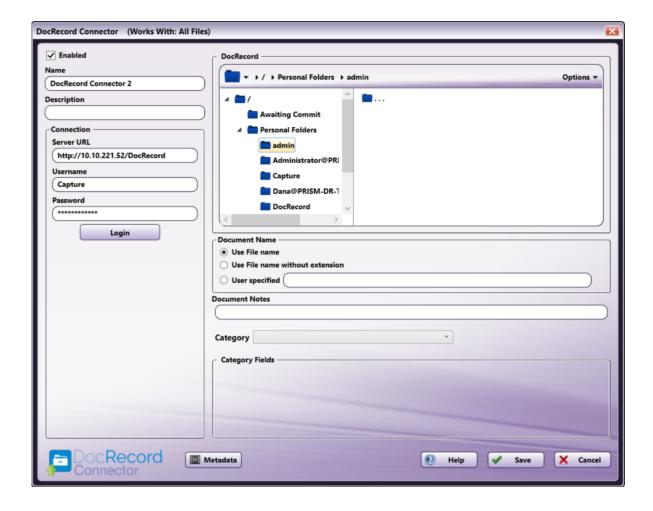
- 1. In the Server URL field, enter the URL address of your DocRecord Server.
- 2. Enter your DocRecord Server user credentials in the **Username** and **Password** fields.
- 3. When you are done, select the **Login** button to connect to your DocRecord Server.



Selecting A Folder

Once connected, the right hand side of the DocRecord node properties window displays a tree-view of your DocRecord folders that allows you to browse through your DocRecord folders and select a folder for your documents. The DocRecord Connector features tree-view that can be hidden or shown (shown by default) by accessing the **Options** dropdown menu.

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Sending Documents To A New Folder

You can also choose to create a new folder in DocRecord to send documents to. Do one of the following:

- Select the **Create New folder** option from the **Options** drop-down menu.
- Use the keyboard shortcut of Ctrl + Shift + N to create a new folder.

For both methods, a Create New Folder window appears. Enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear.

Note: DocRecord adds a unique number to any folder with the same name as a previously-created folder. For example, if you create a folder named "Invoices" and there is already a folder named "Invoices" in that folder, DocRecord will rename the new folder to "Invoices1", assuming that folder name is not itself a duplicate.

Document Name

The Document Name area allows the user to specify that parameters of document naming within the DocRecord Connector. Options include

- Use File name The document uploaded to DocRecord will have the same name as the document coming in to the node. This includes the file extension.
- **Use File name without extension** The document uploaded to DocRecord will have the same name as the document coming in to the node, but does not include the file extension.
- User specified You can enter a specific document name to associate with the document as it is uploaded to DocRecord.

Notes:

- This field supports metadata.
- DocRecord allows the creation of multiple documents with the same name.

File Name Restrictions

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The following restrictions apply to file names:

• Non-printable characters cannot be included in a file name (tabs, newlines, etc.)

View Options

You can adjust the default view of your DocRecord folders in the node properties window by using the Options button on the top right hand side of the window. Do the following:

• Click on the **Options** button. The following drop-down menu will appear:



• To turn off the default view, uncheck the **Show tree view** option.

See the following illustrations for comparison on the different folder views available:

Tree View ON



Tree View OFF



 $\bullet \ \ \, \text{To refresh the current view with the most up-to-date folders/files, select the } \textbf{Refresh} \ \text{option}.$

Document Notes

 $\label{localization} \mbox{Documents can have notes associated with them in DocRecord. Use this field to add {\bf Document Notes}.$

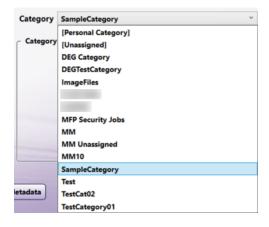
Note: This field supports metadata.

Category

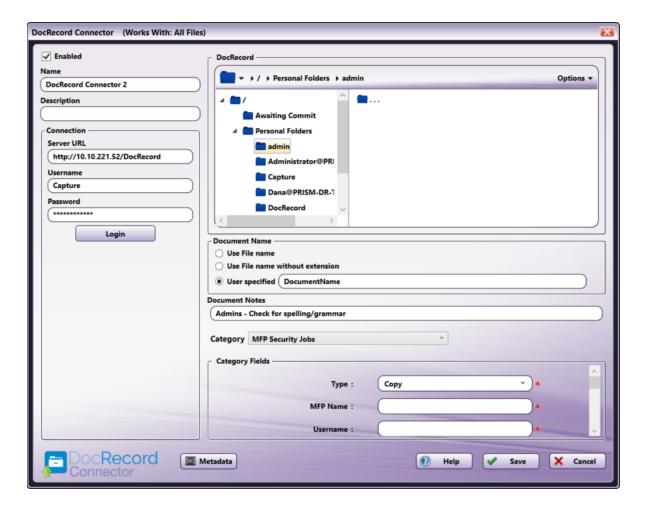
Documents can have Categories associated with them in DocRecord. To add Categories, do the following:

 $1. \ \, \text{Select a Category from the \textbf{Category dropdown}}. \ \, \text{This dropdown populates with the Categories associated with the Folder selected above}.$

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2. After selecting a Category, the Category Fields area populates with the associated fields. Enter any information in the Category Fields area that you would like associated with the document.



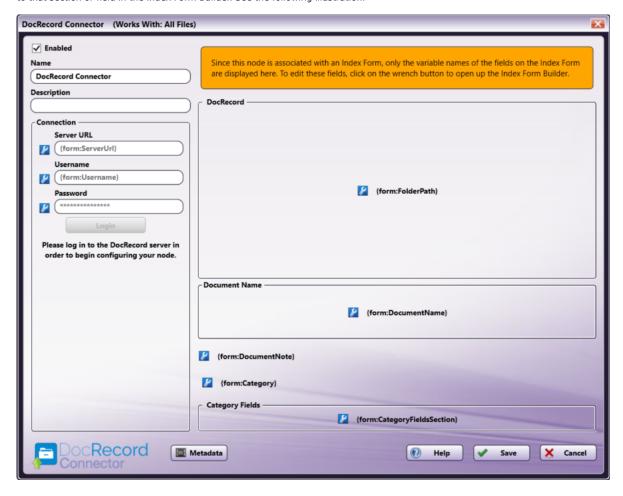
Notes:

- Required category fields are marked with a red asterisk.
- The DocRecord Connector does not support Table category fields. These fields will not appear as options.
- Category Fields support metadata.

Using with Index Form

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When using the DocRecord Connector node on an Index Form, the DocRecord Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:



Creating A DocRecord Server Index Form

When the workflow is configured with an Index Form, you will be prompted to log into your DocRecord account at the MFP before you begin scanning and sending. To create an Index Form that allows you to customize your **DocRecord Connector** node at the MFP, do the following:

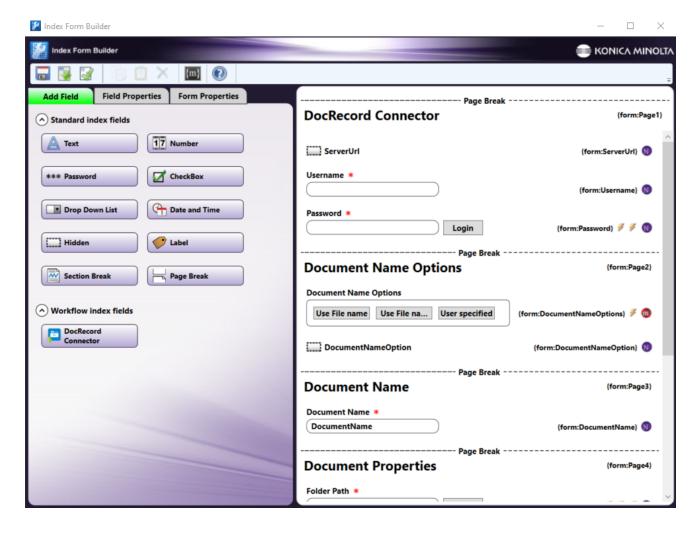
- 1. Make sure that your workflow includes a **DocRecord Connector** node.
- 2. Click on the Forms dropdown in the toolbar and select Create New Index Form to open the Index Form Builder, as in the following illustration:

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3. Select the **Blank Index Form** option in the pop-up. Then, drag the **DocRecord Connector** icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

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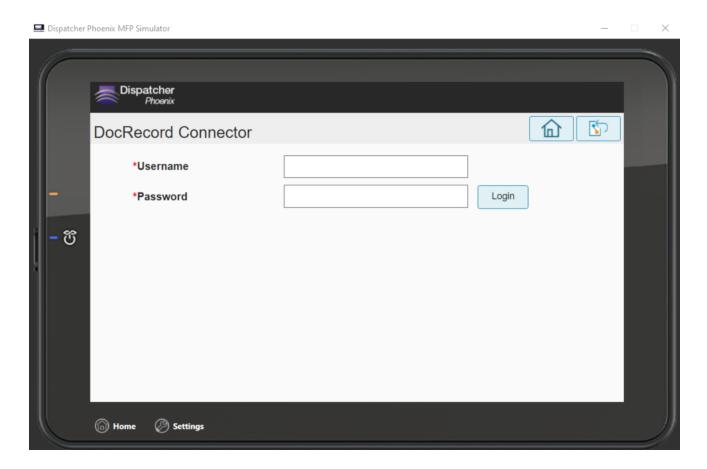
- 4. Select the ServerURL component and enter the server URL for the DocRecord installation in the Default value field.
- 5. Enter any additional information, such as **Username**, **Password**, **Document Name**, etc.
- 6. Validate, Save, and close the Index Form Builder.
- 7. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.

DocRecord Index Form On MFP

When the DocRecord Connector is configured with an Index Form, the user will be able to enter their account credentials, browse through folders, and add any necessary additional information. To use the DocRecord Connector at the MFP Panel, do the following:

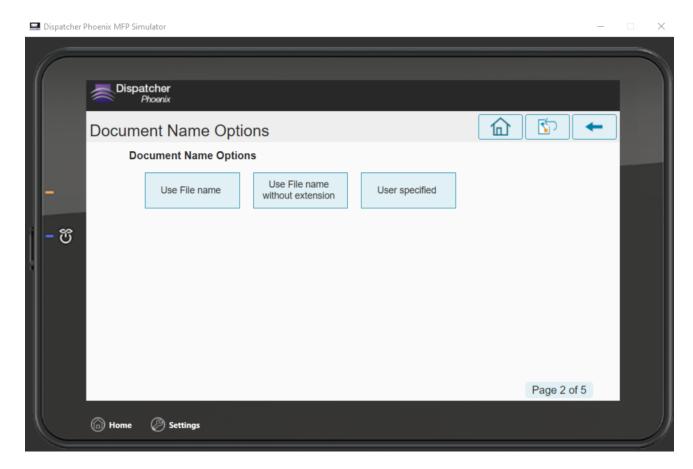
1. At the MFP, open the workflow containing the DocRecord Connector and the node associated with the Index Form that you have already configured. The DocRecord Connector will appear, as in the following illustration:

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- 2. If you have preconfigured the DocRecord Connector with a Username and Password, they will appear automatically. If not, enter them now and select **Login**.
- 3. Select the Document Name Option, as in the following illustration:

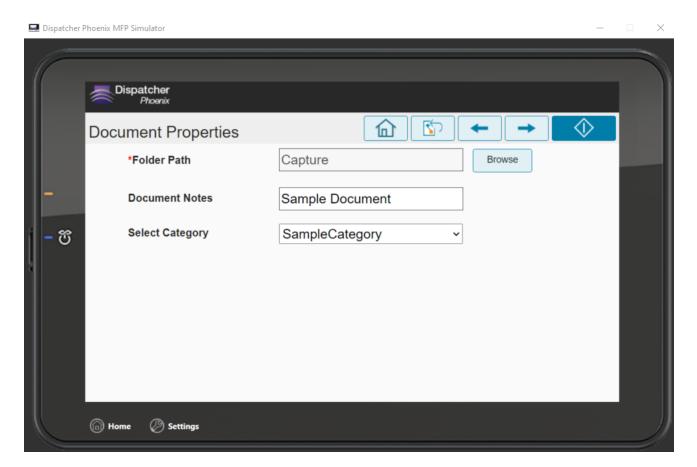
Konica Minolta 958 / 1597



If you select the **User specified** option, you will have the opportunity to enter the **Document Name** on the next screen.

4. Browse for the DocRecord folder you would like to save to, enter any Document Notes, and select an option from the **Select Category** dropdown menu, as in the following illustration:

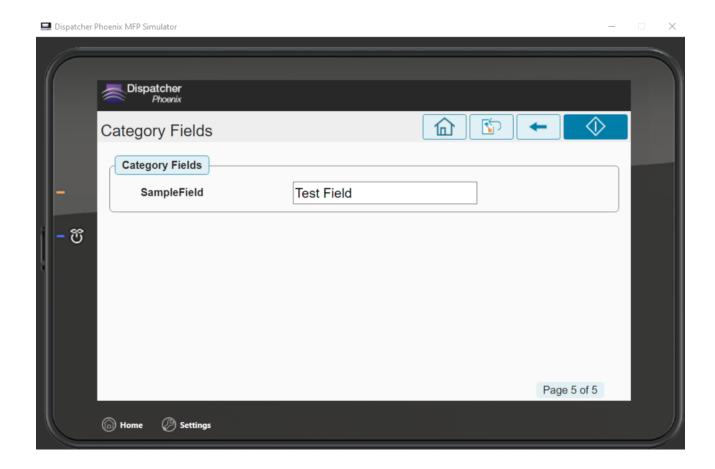
Konica Minolta 959 / 1597



Note: The MFP screen updates immediately after selecting a Category. If you need to edit the Category, you can navigate back to this Index Form page with the arrows at the top of the MFP screen.

5. Enter any information needed in the **Category Fields**, as in the following illustration:

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DocuSign Connector



Use the DocuSign Connector node to distribute documents to DocuSign, an online file sharing and Cloud content management service for businesses. The connector allows you to send documents to DocuSign via an automated workflow, or you can access DocuSign directly at the MFP panel.

Note: To use the **DocuSign Connector** node, you must have a DocuSign account.

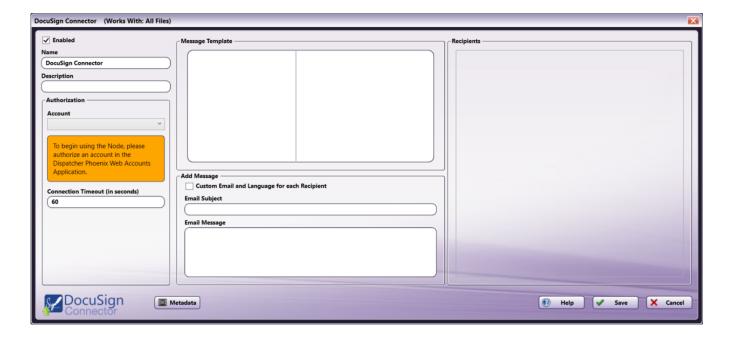
To open the DocuSign Connector node's configuration window, add a Distribution node for DocuSign to your workflow and double-click on it.

Adding Your DocuSign Account

To utilize the DocuSign Connector, the user must first add the DocuSign Account to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix Web Accounts** page.

Configuring the DocuSign Connector

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- **Enabled** To enable this node in the current workflow, ensure the **Enabled** box is checked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it. While the workflow will still validate, documents will not be output and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

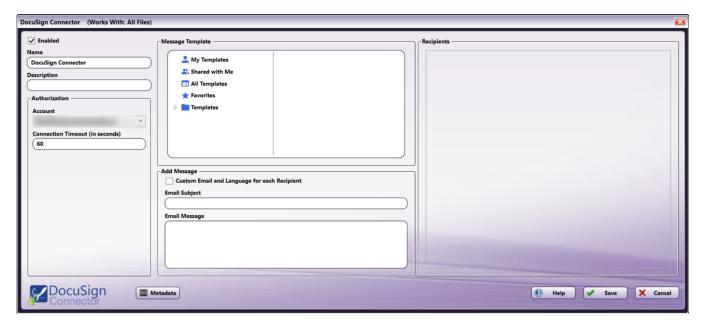
- Help To access Dispatcher Phoenix Online Help, click this button.
- Metadata To access the Metadata Browser window, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node configuration and exit the window, click this button.

Connecting to DocuSign

To connect to DocuSign, do the following:

1. In the Authorization area, select a Docu Sign account from the dropdown.

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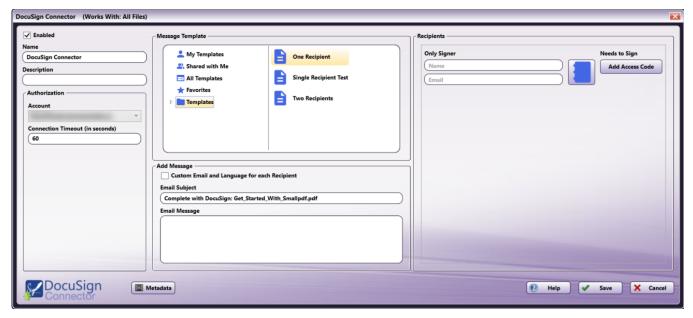
Note: If you have not already set up a DocuSign account through Dispatcher Phoenix Web, you must do this before it will appear in the dropdown.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Message Template

The Message Template area displays the available Message Templates for the selected account, as well as four common queries: My Templates, Shared with Me, All Templates, and Favorites. To select a Message Template, do the following:

- 1. Select a folder or query in the left-hand column.
- 2. After selecting a folder or query, the templates associated with it will appear in the right-hand column. Select the template you would like to use.



3. After selecting a Template, the Recipients area will populate with any of the preconfigured recipients associated with that Template.

Recipients

The Recipients area shows all of the preconfigured Recipients associated with the document template. Field options include:

- Name The name of the recipient
- Host The host name of the email service

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- Email or Host Email The email address of the recipient or email host
- Access Code A security code associated with opening the document
- Notary Name The name of the notary associated with the recipient
- Notary Email The email address of the notary associated with the recipient

For templates that don't have preconfigured Recipient contact information, the fields are blank. All blank Recipient fields are editable. Additionally, Recipient contact information can be entered using the **Address Book and User Directory** described below.

For templates that do have preconfigured Recipient contact information, text in those fields is greyed out, and those fields are not editable.

Clicking the **Add Access Code** button will cause the Access Code field to appear for that Recipient. If the Access Code field is present, the button will display **Remove Access Code**, which removes the field.

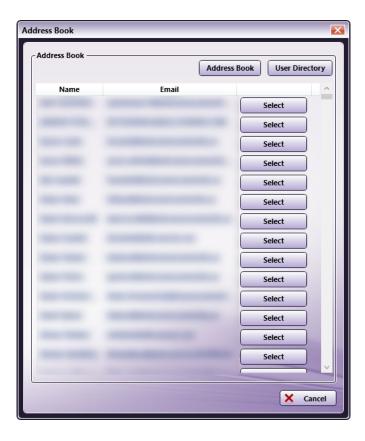


Note: The Access Code field can accept a blank access code (no characters).

Address Book

Clicking the blue Address Book button opens a window with the Address Book and User Directory options.

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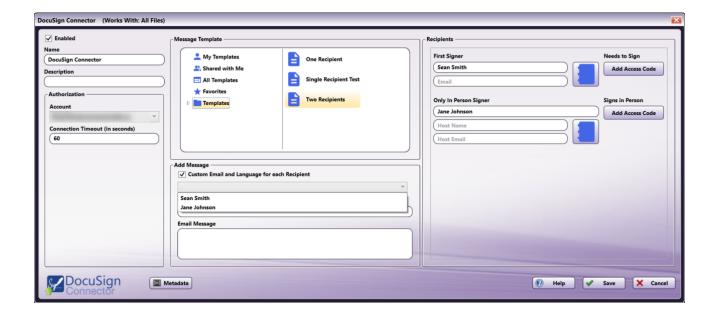


The Address Book is a list of manually added contacts, and the User Directory is a list of all of the users at your company with a DocuSign account. By default, the Address Book opens first. If there are no contacts in the Address Book, you will be directed to the User Directory.

Add Message

The Add Message area allows you to add a message along with documents being uploaded to DocuSign. Options include:

• Custom Email and Language for each Recipient - Selecting this checkbox enables a dropdown with the name of each Recipient, allowing you to enter a custom Email Subject and Email Message for each. Note that any Recipients who do not have preconfigured names will appear as blank options in the dropdown menu.



- Email Subject This field allows you to enter an email subject line for the email sent along with the document
- Email Message This field allows you to enter content for the body of an email for the email sent along with the document

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Creating the DocuSign Index Form

A DocuSign Index Form allows you to enter Recipient information at the MFP panel. To create an Index Form that allows you to customize your DocuSign upload node at the MFP, do the following:

- 1. Make sure that your workflow includes a **DocuSign Connector** node.
- 2. Configure the **DocuSign Connector** as described above, including adding and selecting an account and selecting a Template.

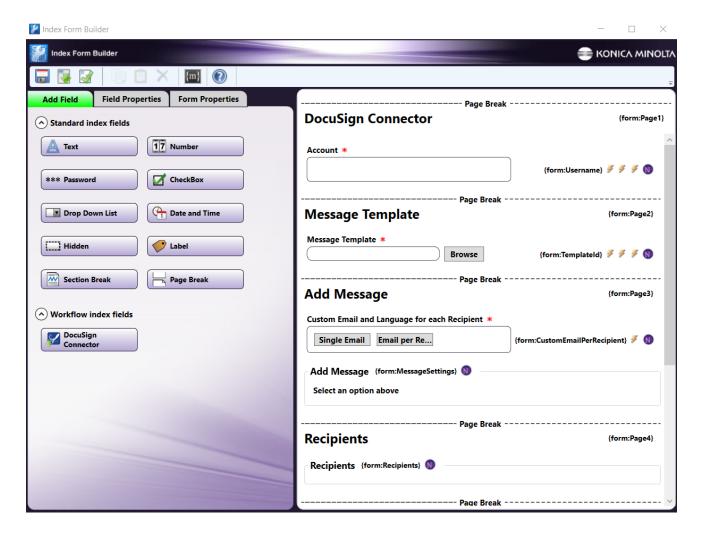
Important! These fields are required for workflow validation and must be configured in the node before creating the Index Form.

3. Click on the Forms dropdown in the toolbar and select Create New Index Form to open the Index Form Builder, as in the following illustration:



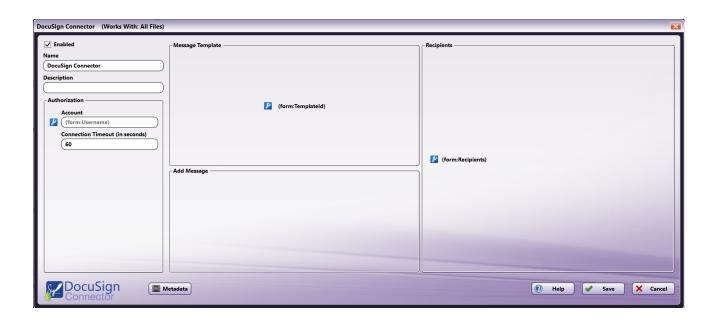
4. Select the **Blank Index Form** option in the pop-up. Then, drag the **DocuSign Connector** icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

Konica Minolta 966 / 1597



- 5. Validate, Save, and close the Index Form Builder.
- 6. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.
- 7. The **DocuSign Connector** node properties window will automatically populate with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

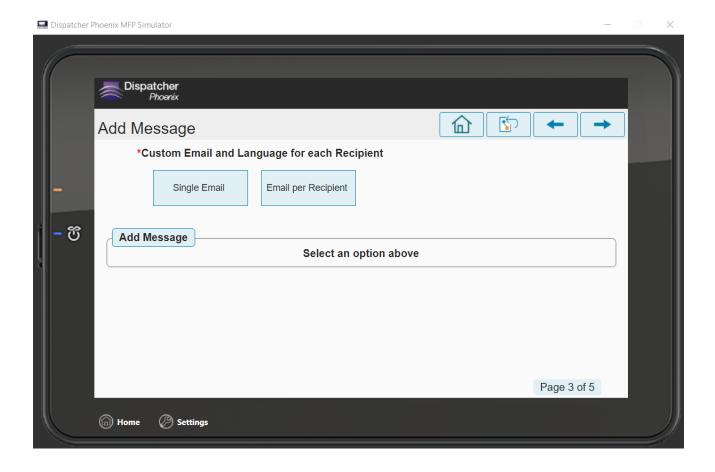
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DocuSign Connector at the MFP

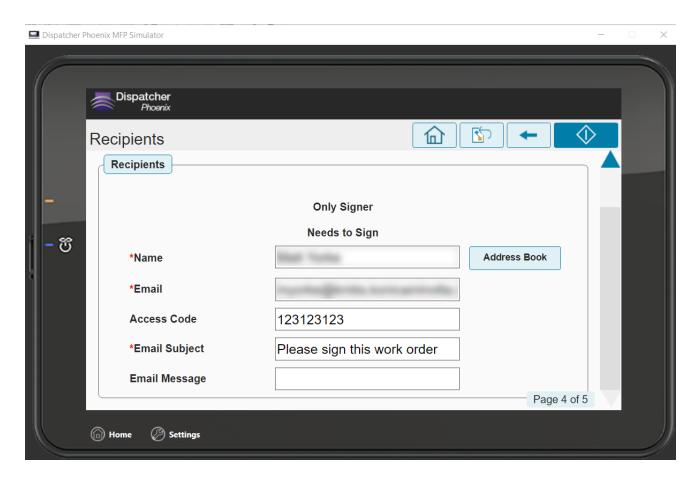
At the MFP, take the following steps:

- 1. **Select your workflow** If only one Dispatcher Phoenix workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
- Select Add Message options You will be prompted to select whether you would like a Single Email or an individual Email per Recipient. If you select Single Email, the area below the buttons will populate with field for Email Subject and Message for you to fill out. If you select Email per Recipient, the fields for Email Subject and Message will be on a new page for each Recipient.



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3. **Enter recipient information** - You will be prompted to enter the recipient information for each recipient. You can access the Address Book and Directory by tapping the **Address Book** button.



4. Select the "Scan" button - This will send the scanned document to the intended recipients via DocuSign.

Dropbox Connector



Use the **Dropbox Connector node** to connect to a Dropbox account, including a Dropbox Business Standard or Advanced account, to distribute documents to Dropbox. Dropbox is a file hosting service that offers Cloud storage and file synchronization. Using the Dropbox Connector node, you can distribute documents to Dropbox accounts and also view Personal, Team, and Shared folders at the MFP panel.

Dispatcher Phoenix workflows that contain the Dropbox Connector node can:

- Collect files from various input sources. For example, you can use the Dropbox Connector index form to dynamically select an account/folder path. You can also use metadata for the folder path in the Dropbox Connector configuration.
- Perform powerful image processing operations and complex routing logic on these files.
- Distribute the files to Dropbox folders.

You can share Dropbox files directly from the MFP control panel via email and control editing access to the scanned document via email addresses.

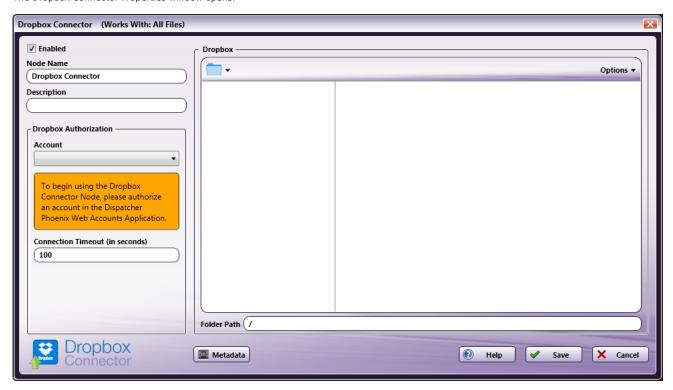
Notes:

- To use the Dropbox Connector, you must have a Dropbox account and you must set up your Dropbox Account in Dispatcher Phoenix Web.
- The maximum file size for uploading documents to Dropbox is 149 MB.

Configuring the Dropbox Connector Node

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To open the Dropbox Connector node, drag-drop a **Dropbox Connector** node from the Distribution panel to the workflow and then double-click on it. The Dropbox Connector Properties window opens.



Configure the following:

- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Dropbox Authorization

Use the **Dropbox authorization** area to configure the following settings:

- Account Click the drop-down to view a list of authorized Dropbox accounts. Select the Dropbox account containing the documents or folders you want the workflow to collect. If no accounts appear, be sure the Dispatcher Phoenix Web logon user account that was used to authorize the Dropbox account is the same as the current Dispatcher Phoenix logon user account. The logon user accounts must match for any Dropbox accounts to appear in Dispatcher Phoenix.
- Connection timeout (in seconds) Specify the number of seconds you want to elapse before a network connection times out (i.e., for login or logout operations).

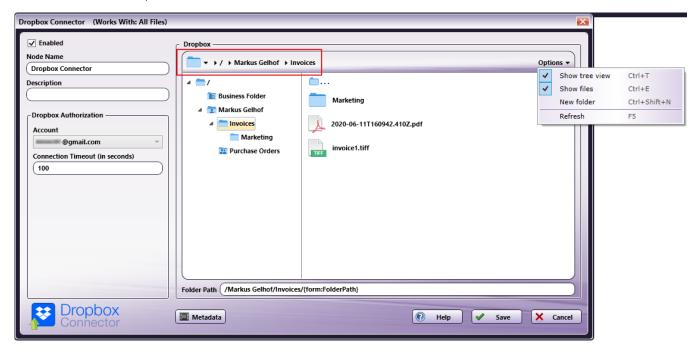
Dropbox Explorer Area

Once the connection with Dropbox has been established, the right side of the Properties window displays the **Dropbox** Explorer area containing a tree-view of your Dropbox folders, sub-folders, and files. Use this area to browse through your Dropbox folder structure and choose a folder in which to store your documents.

The current folder path displays next to the folder icon at the top of the Dropbox area _____. You can use this folder path to navigate back through your folder structure. The **Folder Path** field below the explorer area also displays the current path.

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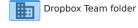
In the following illustration, the folder path displays and the Dropbox area shows the Tree view as well as the files in the selected folder, as per the current selections from the Options menu:



Folder Types

The following folder types may appear in the Dropbox Explorer area, depending on your Dropbox version:









Options

Use the **Options** button in the upper-right corner of the Dropbox Explorer area to configure the folder view or add a new folder. The drop-down menu includes a shortcut key for each option:

- Show tree view To view the complete folder structure in a tree view, select this option.
- Show files To show files within the folder browsing view, select this option.
- New folder To create a new folder in the currently selected folder path on Dropbox, select this option. The Create New Folder window
 appears.
- Refresh To refresh the folder browser view (Show tree view or Show files) in Dropbox Explorer, select this option.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.).
- Do not use any of the following:

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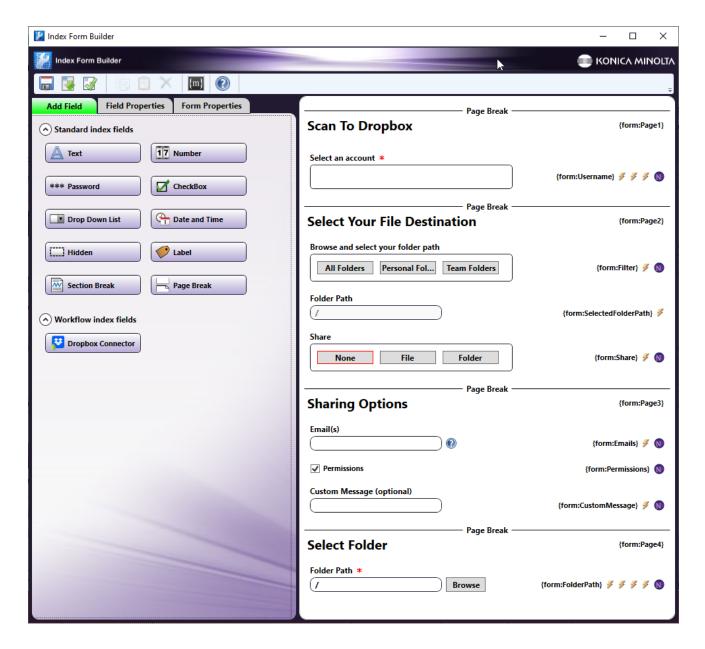
Folder Path

The **Folder path** field below the folder tree auto-populates when you make your folder selection in the Dropbox Explorer area. If you do not want to navigate the file explorer, you can manually enter the folder path in the field instead.

Creating a Dropbox Connector Index Form

You can create an index form that enables you to log into Dropbox automatically at the MFP. Do the following:

- 1. Make sure you are logged into Dropbox from the **Dispatcher Phoenix Web Account Manager**.
- 2. Make sure your workflow includes a MFP Panel node and a Dropbox Connector node.
- 3. From the MFP Panel node, open the Index Form Builder. The Dropbox Connector button appears under the Workflow Index Fields area.
- 4. Drag and drop the **Dropbox Connector** button to the Index Form work area. A Scan to Dropbox index form appears, as in the following illustration:



5. Save and close the Index Form Builder.

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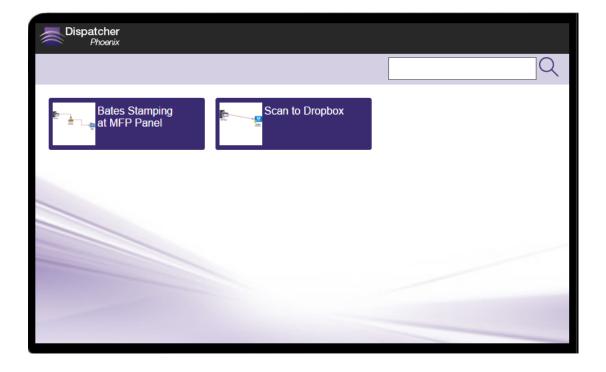
6. The Dropbox Connector node properties window populates automatically with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:



Dropbox Index Form on MFP

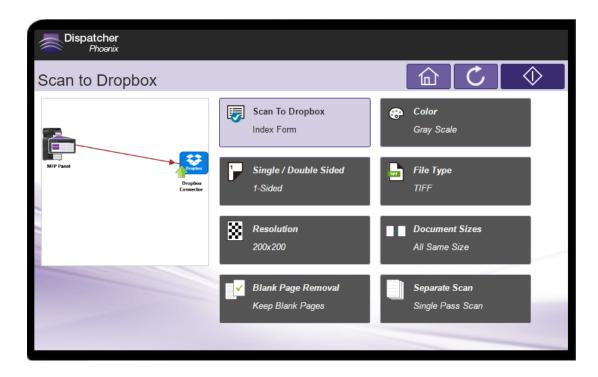
At the MFP, take the following steps:

1. **Select your workflow** - If only one Dispatcher Phoenix workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow. See the following illustration:



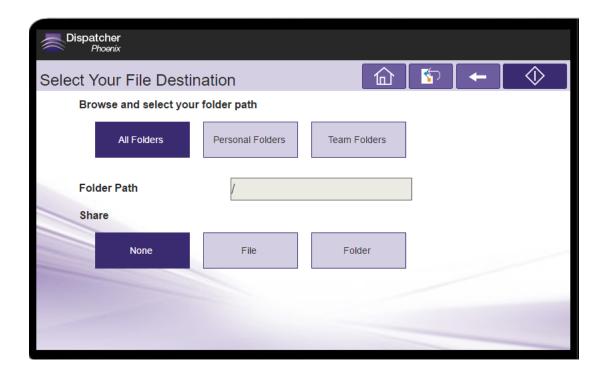
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2. **Select the index form** - When your workflow appears on the screen, select the index form.



Note: If you have multiple Dropbox accounts registered and none are configured as the primary account in the **Dispatcher Phoenix Web Account Manager**, the Account Selection screen appears where you must select the account containing the folder you want to process.

3. **Select your File Destination** - When you select the index form on the Selection screen, the Select Your File Destination screen appears. Use this screen to select a destination folder and/or share the file with team members. See the following illustration:

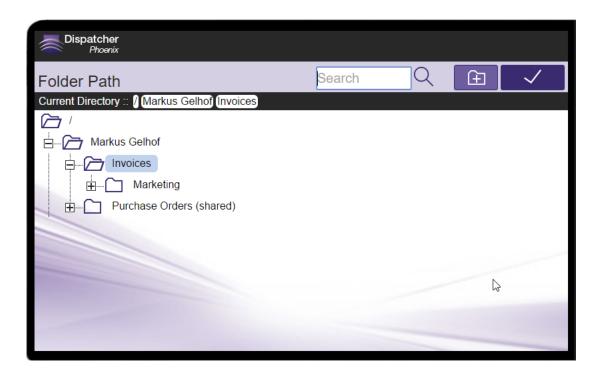


The **Folder Path** field displays the current folder path of the destination folder.

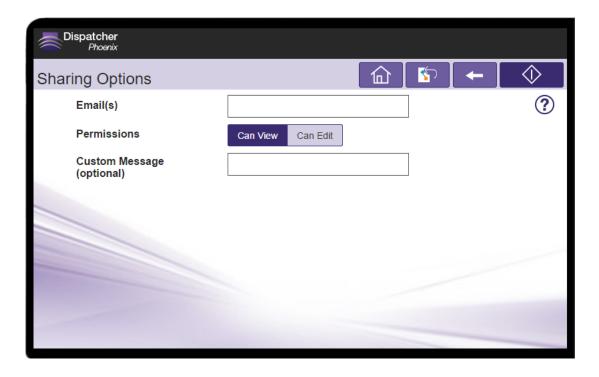
1. **Browse and select your folder path** - To change the folder path, click on a filtering option at this field to access the Folder Path screen. The filtering option you select here restricts the list of folders that displays on the Folder Path screen, shown below. The **All Folders** option applies no restriction.

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On the Folder Path screen, click the + and/or - boxes in the folder tree structure until the desired destination folder appears. Be sure the folder is highlighted, then click the **Checkmark** button to return to the Select Your File Destination screen where the selected folder path displays in the **Folder Path** field.



- 2. Folder Path The current folder path of the destination folder displays.
- 3. Share Share a file or folder with one or more team members, if desired. The Sharing Options screen appears:



You have the following options:

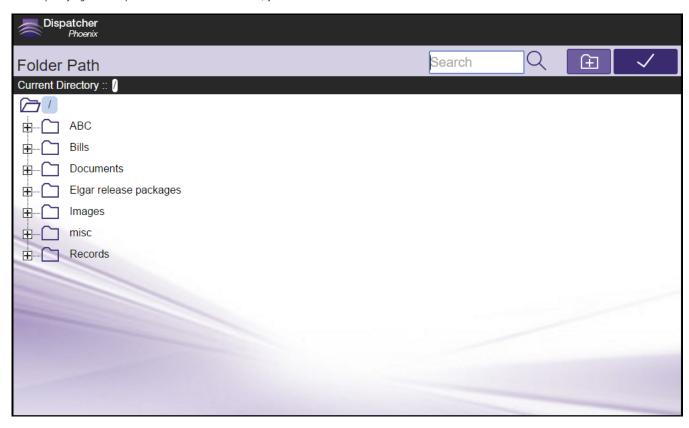
- Email(s) Enter one or more e-mail addresses, separating each address with a comma delimiter.
- **Permissions** Specify View or Edit access for the team members. **Note:** Not all file types are editable. If you select "Can Edit" for a file type that cannot be edited, Dispatcher Phoenix will log an error regarding the permission, but will upload the document as expected.

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- Custom Message (optional) Enter a custom message to include in the email, if desired.
- 4. Once you have made your selections, initiate the scan. The scanned documents are sent to the Dropbox destination folder and shared to the specified team members (if any).

The Search Field

When specifying a folder path on the Folder Path screen, you can use the Search field to narrow the list of folders.

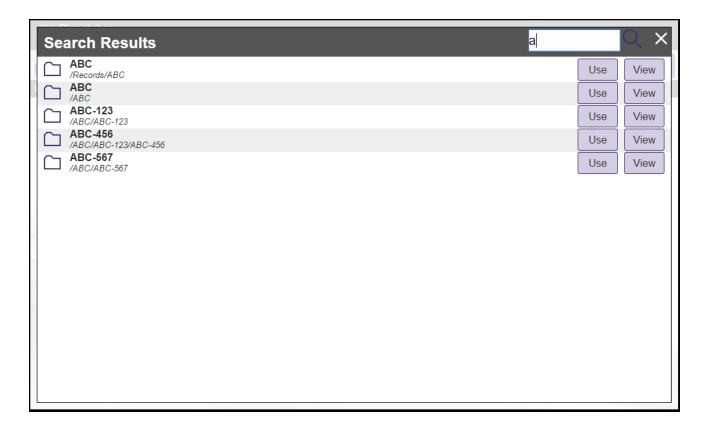


This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly. The search operation will be conducted on any folders and sub-folders within the root directory.

Notes:

- Wildcard characters (*, %) are not supported in this search.
- The Search attempts to produce results as soon as you begin entering search criteria.
- If a folder name is a compound word using CamelCase (e.g., "MyFolder") or the folder name contains spaces (e.g., "My Folder"), the search will be conducted on the separate word components (e.g., "My" and "Folder"). Otherwise, the search will be conducted on the entire name (e.g., a search on "folder" will not return the "Myfolder" folder).

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Once the folder list is filtered per your search, you can do the following:

- $\circ~$ Use - To select a particular folder, tap this button.
- **View** To return to a directory structure view of a particular folder, tap this button.
- $\circ~\textbf{X}$ To release the filter, tap on this button next to the Search field.
- **Search** To submit the search criteria again, tap this icon next to the field.

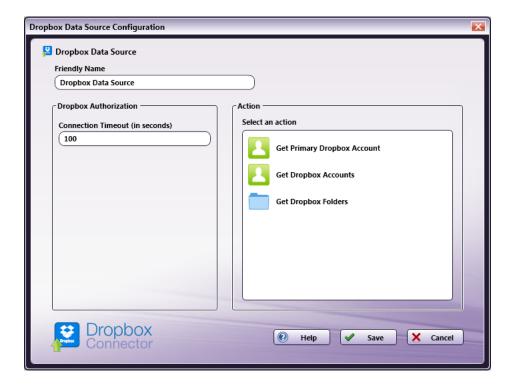
Database Browsing - Dropbox Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from Dropbox.

Using the $\bf Index\ Form\ Builder,\ do\ the\ following:$

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field. Then, add a **Query**.
- 3. Choose Dropbox Data Source from the Query drop-down list.
- 4. The Dropbox Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Dropbox.

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Do the following:

- Friendly Name Enter an identifying name for the Dropbox data source configuration.
- Action In this area, you can choose what kind of action to perform on the Dropbox data source. Options include:
 - Get Primary Dropbox Account This option returns the primary Dropbox account for the user.
 - **Get Dropbox Accounts** This option returns all the Dropbox accounts for the user.
 - **Get Dropbox Folders** Use this action to display a list of folders within a specific Dropbox folder path. When you select the Get Dropbox Folders item, new fields will appear for configuration, as in the following illustration:



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- Folder Path Enter the folder ID of the Dropbox root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new Dropbox folder at the MFP.
 - Show files Check this option to display files in Dropbox folders at the MFP.
 - Enable folder search Check this options to enable folder search at the MFP.

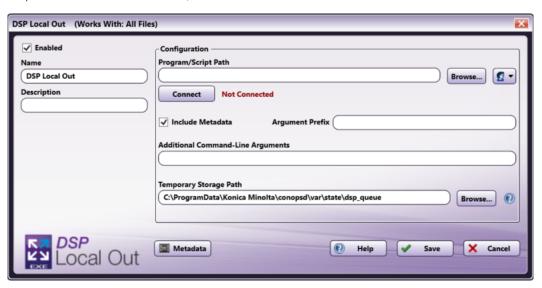
DSP Local Out



The DSP Local Out node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Local Out Node

To open the DSP Local Out node window, add a distribution node for DSP Local Out node and double-click on it.



There are several buttons and fields that appear, including:

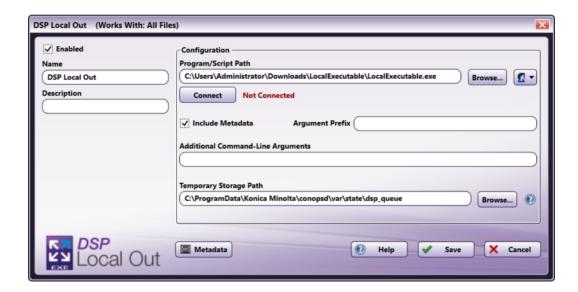
- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

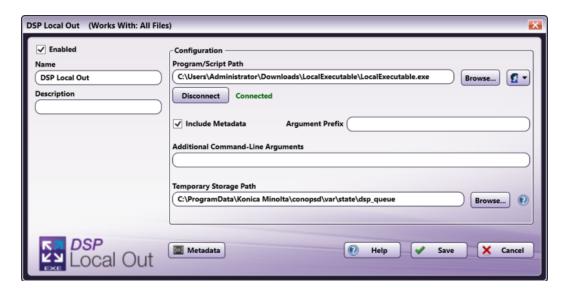
To use this with a DSP-developed local executable, you must configure the node to point to the executable's location (e.g., an accessible folder). After the desired application is saved in the accessible folder, you can direct the DSP Local Out node to use it. To configure the node, do the following:

- 1. Double-click the DSP Local Out node to open it.
- 2. Enter the file path to the application. You can also use the **Browse** button to open a folder browser to find the application.

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- The **Authorization** button allows you to enter or edit network credentials, if they are necessary to access the folder the application resides in.
- 3. Select the **Connect** button. This will establish a connection between the DSP Local Out node and the application. This will also confirm that the application is properly registered with a valid DSP license key.

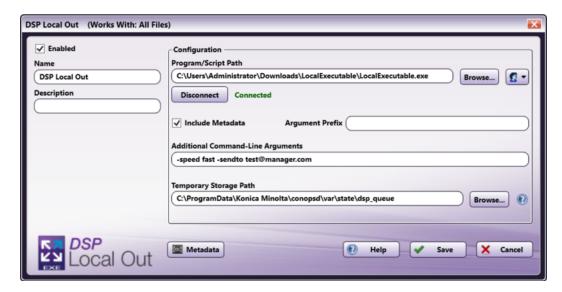


Important! If you have not successfully connected, the workflow cannot be properly validated.

Note: Any changes made to the Program/Script Path or Network Credentials will require you to select the **Connect** button to reestablish the connection.

- 4. Select whether you would like to **Include Metadata** when the document is distributed to the local executable. When this checkbox is selected, the node includes all metadata gathered from previous nodes in the workflow. If the box is checked, enter the necessary **Argument Prefix** in the field provided. These are added to the metadata to help the application distinguish metadata from other data.
- 5. Enter any **Additional Command-Line Arguments** in the field provided. Command-Line Arguments are additional coding commands outside the application, which can alter how the application performs. Any necessary command-line prompts will likely be provided along with the application; otherwise, this field can be left blank. This field is metadata compatible, meaning that you can use the **Metadata** button to drag and drop metadata gathered earlier in the workflow into this field.

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Notes:

- When entering a singular argument that includes multiple words, you will need to enter the phrase within quotation marks. For example, if a connected program expects a folder path name and the name includes spaces, the argument would look like: "C:\Program Files\Konica Minolta".
- The DPS Local Out node can process two types of double-quoted arguments:
 - Double quote (each with a backslash) in a double-quoted argument (i.e. "A \"quote\" within a quote.")
 - Single quote in a double-quoted argument (i.e. "A 'quote' within a quote.")
- When entering an argument that includes a single quotation mark ("), a single quote/apostrophe ('), or a backslash (\), you will need to enter a backslash (\) before each symbol in order to properly process the argument. For example, if the application were trying to send the name o'Brien, you would need to enter the argument as o\'Brien to include the single quotation mark.
- 6. If needed, edit the file path where you would like to keep temporary files using the Temporary Storage Path field. This is a temporary location used to store documents for processing by the designated application. You can change the default location as long as it is a shared folder or common folder path that can be accessed by all users. You can also use the **Browse** button to open a folder browser to select an appropriate location to store temporary files.
- 7. Save and close the node.

Note: The DSP Local Out node will distribute documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

DSP Web Out

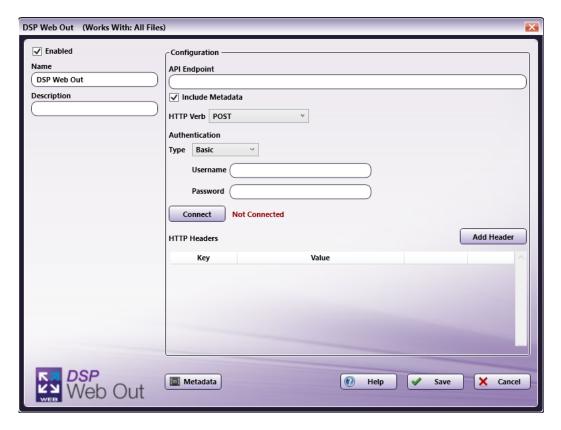


The DSP Web Out node is designed for use with applications/features that have been developed by members of the Dispatcher Phoenix Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Using the DSP Web Out Node

To open the DSP Web Out node window, add a distribution node for DSP Web Out node and double-click on it.

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There are several buttons and fields that appear, including:

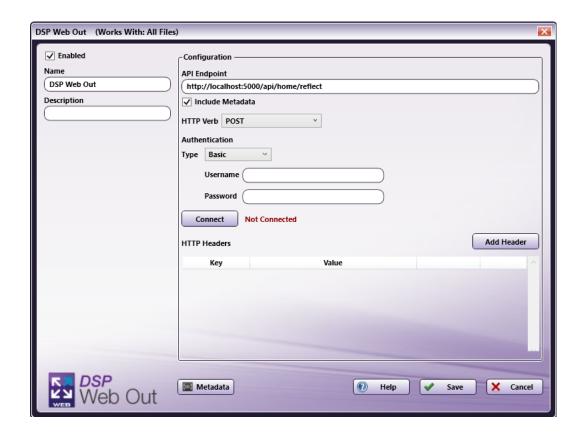
- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API's location (e.g., a URL). To configure the node, do the following:

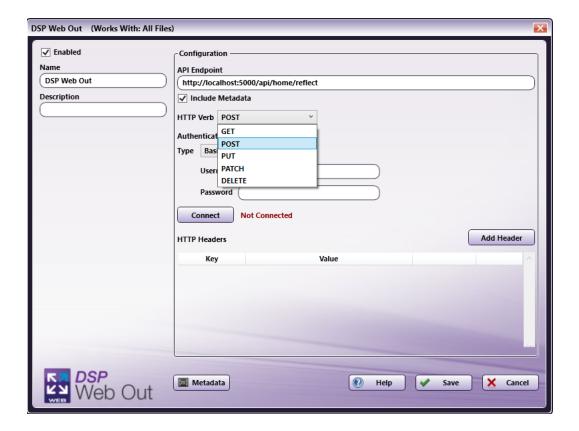
- 1. Double-click the DSP Web Out node to open it.
- 2. Enter the API Endpoint to the application.

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- 3. Select whether you would like to **Include Metadata**. When this checkbox is selected, the node includes all metadata gathered from previous nodes in the workflow.
- 4. Select the **HTTP Verb**. Options include
 - Get
 - Post
 - Put
 - Patch
 - Delete

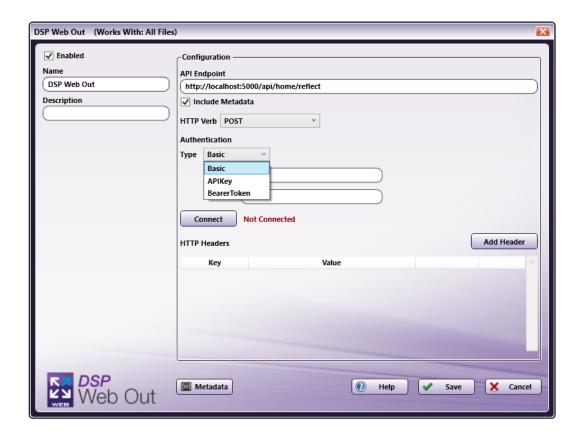
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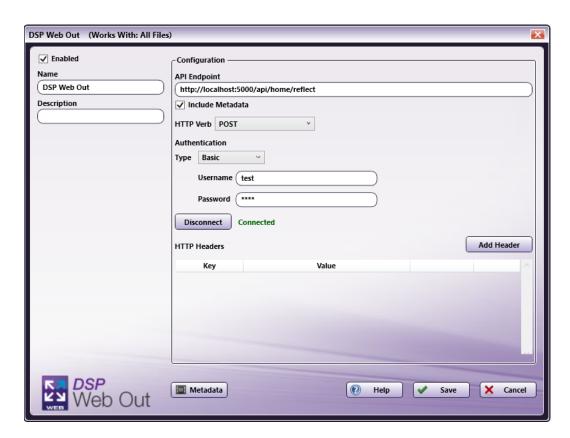
5. Select your **Authentication** type. Options include:

- $\circ~$ Basic This will prompt you to enter your Username and Password.
- APIKey This will prompt you to enter your **Key Name** and **Key Value**.
- $\circ~$ Bearer Token This will prompt you to enter your Token.

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6. Select the **Connect** button. This will establish a connection between the DSP Web Out node and the application. This will also confirm that the application is properly registered with a valid DSP license key.

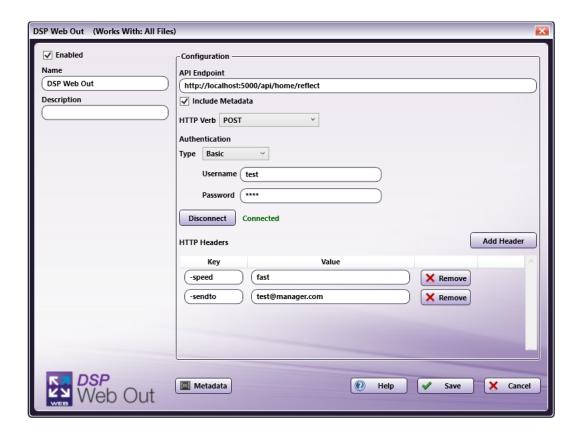


 $\textbf{Important!} \ \textbf{If you have not successfully connected, the workflow cannot be properly validated}.$

Note: Any changes made to the API field will require you to select the **Connect** button to reestablish the connection.

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7. If needed, add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header. Headers are also metadata compatible. To add metadata to a Header, click the **Metadata** button and drag-drop the metadata key into the Header **Key** or **Value** field.



8. Save and close the node.

Note: The DSP Web Out node will distribute documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

Dispatcher Stratus Connector



The **Dispatcher Stratus Connector** allows your Dispatcher Phoenix installation to distribute documents and data to Dispatcher Stratus and an associated **Collect from Dispatcher Phoenix** node. This allows you to combine the powerful document processing capabilities of Dispatcher Phoenix with the people-based workflow capabilities of Dispatcher Stratus.

Note: To use the Dispatcher Stratus Connector , you must have a configured Dispatcher Stratus tenant (http://dispatcherstratus.com/).

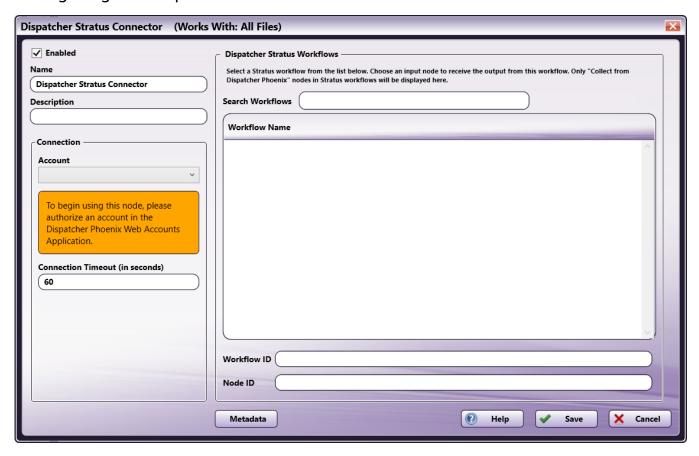
To open the Dispatcher Stratus Connector node's configuration window, drag and drop the node onto your workflow canvas and double-click on it.

Adding Your Dispatcher Stratus Account

To utilize the Dispatcher Stratus Connector, the user must first add the Dispatcher Stratus tenant to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix Web Accounts** page.

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Configuring the Dispatcher Stratus Connector



- **Enabled** To enable this node in the current workflow, ensure the **Enabled** box is checked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it. While the workflow will still validate if there is at least one enabled distribution node, documents will not be output by this node and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

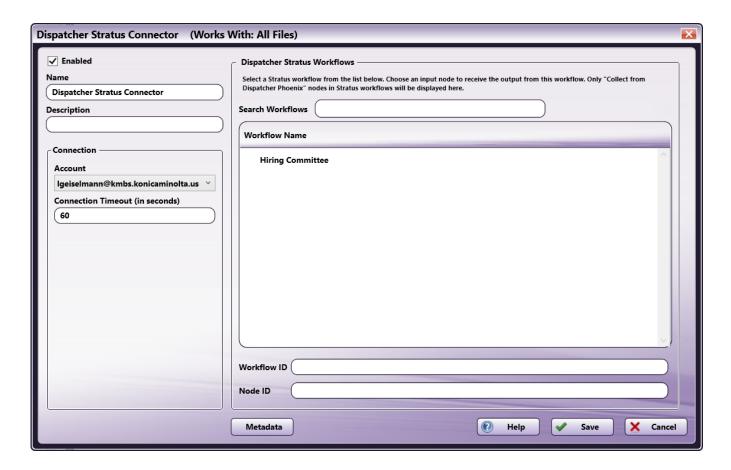
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- ${\bf Save}$ To preserve your node configuration and exit the window, click this button.

Connecting to Dispatcher Stratus

To connect to Dispatcher Stratus, do the following:

 $1. \ \ In the \ Connection \ area, \ select \ a \ Dispatcher \ Stratus \ account \ and \ tenant \ from \ the \ dropdown.$

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Note: If you have not already set up a Dispatcher Stratus account through **Dispatcher Phoenix Web**, you must do this before it will appear in the dropdown.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Application Setup

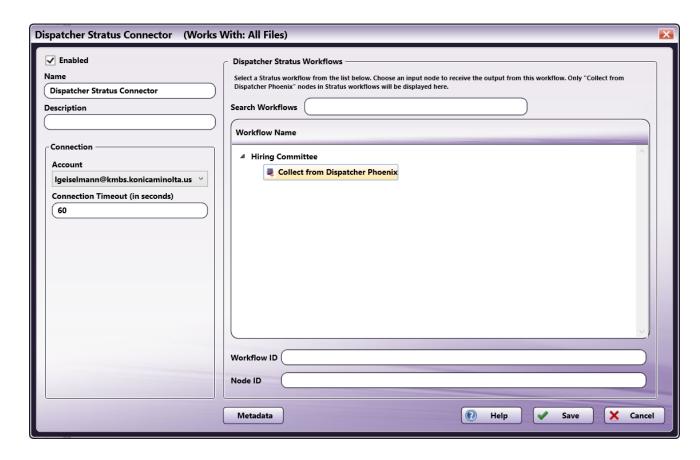
To configure the **Dispatcher Stratus Connector** , do the following:

1. In the Workflow Name area, select the name of the workflow you would like to send documents and data to.

Note: The Dispatcher Stratus Connector will only display workflows that have a "Collect from Dispatcher Phoenix" node.

2. After selecting the workflow name, all the available "Collect from Dispatcher Phoenix" nodes available in that workflow will appear below. Select the one you would like associated with this Dispatcher Stratus In node.

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3. Select the **Save** button to keep your configuration.

Using a Workflow ID and Node ID

The node can also be configured to automatically select a workflow and node using metadata. Do the following:

- 1. Enter a metadata key that you would expect to result in a Workflow ID in the Workflow ID field.
- 2. Enter a metadata key that you would expect to result in a Node ID in the Node ID field.

Important! These fields only accept metadata. If you attempt to manually enter a Workflow ID and Node ID, the fields will automatically clear themselves when the workflow is saved.

3. Select the Save button.

Search Workflows

To aid in finding the correct workflow, you can search for it using the Search Workflows field at the top of the node configuration window.

Using the Dispatcher Stratus Connector

When the Dispatcher Stratus Connector processes a document, it attempts to connect to the selected "Collect from Dispatcher Phoenix" node and workflow. If the workflow is not running or the node is not available for some reason, the Dispatcher Stratus Connector will produce an error and send the processed document to any configured error nodes.

Documents are sent to Dispatcher Stratus once only, meaning they are not saved in a queue to be picked up later.

Metadata

The Dispatcher Stratus Connector node does not produce any metadata of its own. However it does pass along any metadata it recieves from the rest of the Dispatcher Phoenix workflow. This metadata can be used in Dispatcher Stratus by any node that can use metadata, but is not available in the Metadata Browser.

Important! Any metadata that passes through the Dispatcher Stratus Connector node is available in Dispatcher Stratus, but must be entered manually.

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Metadata Format

Metadata that contains a page number is in the following format:

{file:<META_GROUP>["<META_NAME>"][<PAGE_NUMBER - 1>].value}

Metadata that does not contain a page number is in the following format:

{file:<META_GROUP>.<META_NAME>}

Epic Connector



The Epic Connector node for Dispatcher Phoenix allows for seamless connection with Epic, a leading healthcare and patient information software company. The Epic Connector node accelerates document management while maintaining the high levels of information security needed for HIPAA compliance.

This guide provides a step-by-step description of how to set up the node, its typical use cases, and basic troubleshooting.

Public Key and Client Secret Generation

Dispatcher Phoenix and Epic use public/private keys to properly communicate. To set up these keys, do the following:

- 1. After downloading the Epic Connector and updating to Dispatcher Phoenix 8.10 or newer, a post-install script will run that generates the public and private keys in the C:\ProgramData\Konica Minolta\Epic directory.
- 2. Download the Dispatcher Phoenix Epic Connector from the Epic App Market. This will download two applications:
- Dispatcher Phoenix Epic Connector Back End
- Dispatcher Phoenix Epic Connector Front End This will generate the client secret.
- 3. During the configuration of the Back End application, you will be prompted to input the JWT Signing Public Key. Upload the EpicKeyPublic.pem file, located in the C:\ProgramData\Konica Minolta\Epic directory.

Adding Your Epic Account

To utilize the Epic Connector, the user must first update the System Settings for the Epic installation and add the Epic Account to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix System Settings** and **Dispatcher Phoenix Web Accounts** pages.

Note: You will need the Client Secret generated by the Dispatcher Phoenix Epic Connector Front End.

Using the Epic Connector

To open the Epic Connector node window, add a distribution node for Epic Connector node and double-click on it.

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There are several buttons and fields that appear, including:

- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- Name The node name defaults into this field. This name appears in the workflow under the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- **Save** To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Application Setup

To use the **Epic Connector**, do the following:

- 1. Double-click the **Epic Connector** node to open it.
- 2. In the Epic Authorization area, select an Epic account from the dropdown.

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Note: If you have not already set up an Epic account through Dispatcher Phoenix Web, you must do this before it will appear in the dropdown.

Using the Epic Connector with Patient Lookup

To configure the Epic connector to send all incoming documents to a single patient's file, you must first enter a patient's information. This can be done manually or by using the Patient Lookup feature.

Manual Patient Information Entry

Patient information can be entered manually. At minimum, you will need to enter the following patient information:

• Account (the dropdown on the left)

and one of the following:

- Patient Identifier
- Last Name, Date of Birth
- Last Name, Gender, Phone
- Document Date (in the Message Settings section on the right)

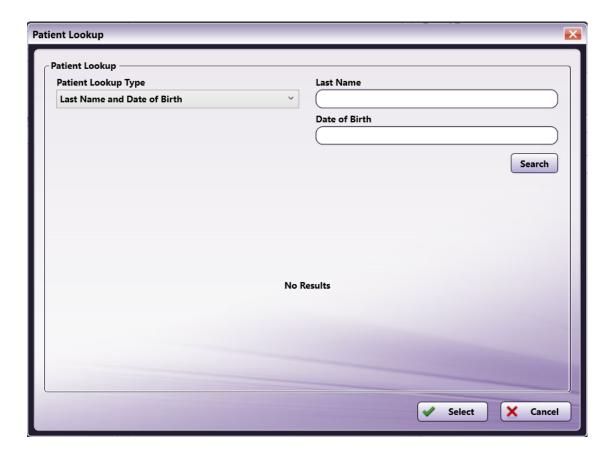
Note: Due to limitations of the HL7 format, the following characters cannot be used and will produce workflow validation errors: ^ ~ \ & | .

Populating Patient Information with Patient Lookup

To use the Patient Lookup feature, do the following:

 $1. \ {\it Click the \ {\bf Patient \ Lookup \ button.}} \ {\it This opens the \ Patient \ Lookup \ window, as in the following illustration:} \\$

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- 2. Select one of the three ways to look up a patient's information:
- Patient Identifier
- Last Name and Date of Birth
- Last Name, Gender and Phone

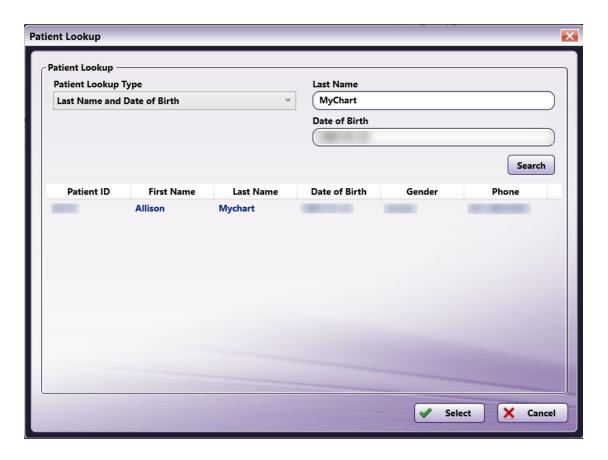
Note: The Patient Identifier field only supports exact matches. For the other field options, exact match is recommended, but may not be required for patient lookup.

3. After selecting one of these options from the **Patient Lookup Type** dropdown, the fields on the right side update accordingly, as in the following illustration:

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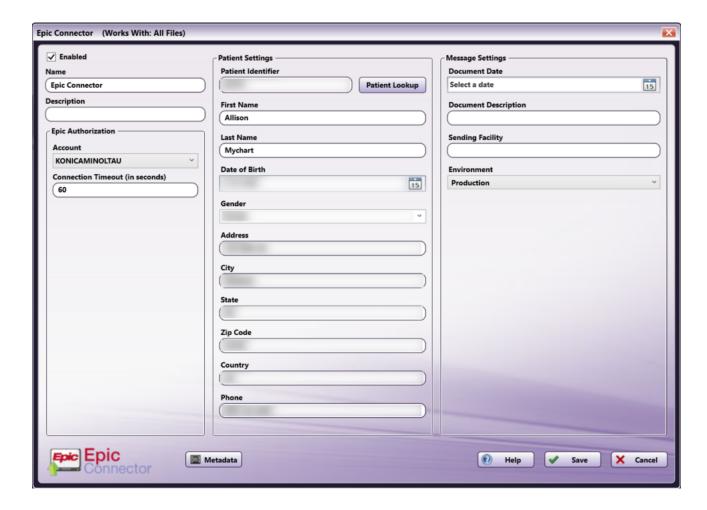


4. After entering the patient's information, select the **Search** button. This will display any valid search results and allow you to choose the correct patient, as in the following illustration:



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5. Select the correct patient, then select the **Select** button. This will populate the Patient Settings with the patient's information, as in the following illustration:



Message Settings

To complete setup, you may select or enter additional information for the uploaded documents in the Message Settings section, including:

- Document Date (Required)
- Document Description
- Sending Facility
- Environment (Note that this will likely always be set to Production)

When complete, the Epic Node can be saved, as in the following illustration:

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Using the Epic Connector with an Index Form

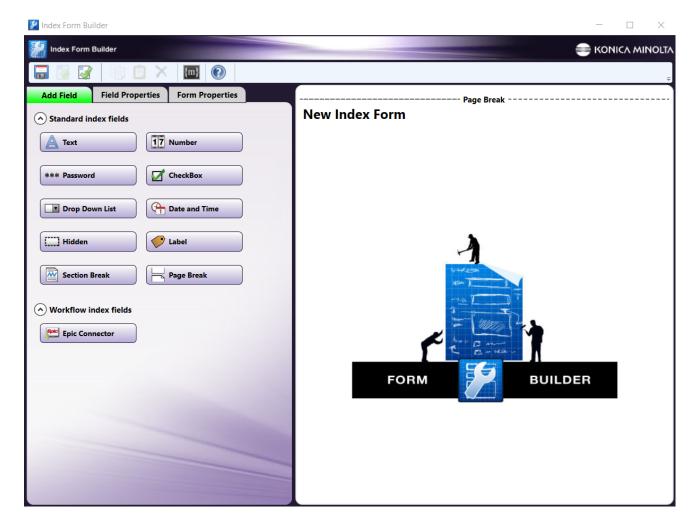
The Epic Connector is also capable of using an attached Index Form at the MFP to allow for more individual control over patient records. \

Important! When using the Epic Connector and an Index Form with one of the supported collection nodes (**MFP Capture**, **Web Capture**, **Dispatcher Phoenix Mobile**, **Batch Indexing**), the user who is signed on to the device will need to have an Epic account registered in Dispatcher Phoenix Web in cases where the workflow is shared.

To set up the Epic Connector with an attached Index Form, do the following:

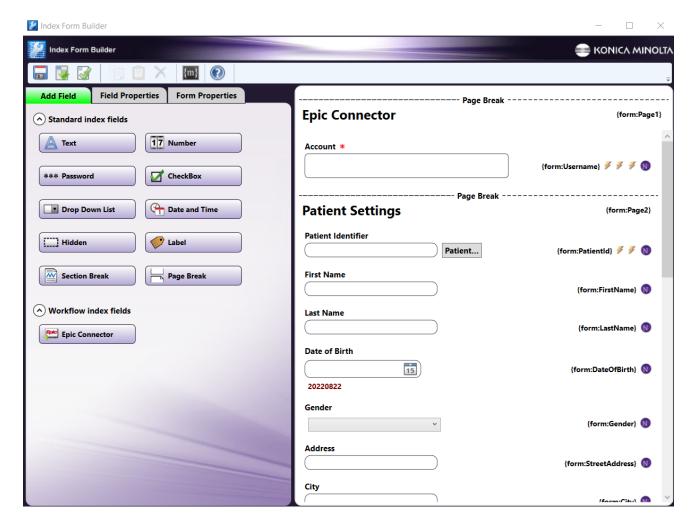
- 1. Add a node that is capable of attaching an Index Form (e.g. MFP Panel) to your workflow by dragging and dropping it into the Workflow Builder area, and connect it to the Epic Connector.
- 2. Configure the Epic Connector node according to the Application Setup section.
- 3. Open the node associated with the Index Form.
- 4. Click the **checkbox** next to Attach Index Form and then the + icon to open the Index Form Builder. Then, select the **Blank Index Form** option in the pop-up, as in the following illustration:

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5. Drag the **Epic Connector** icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

Konica Minolta 997 / 1597



6. Validate, Save, and close the Index Form Builder.

Uploading Documents with the Epic Connector

When documents are uploaded to Epic through the Epic Connector, there are three possibilities, based on the accuracy of the patient information provided:

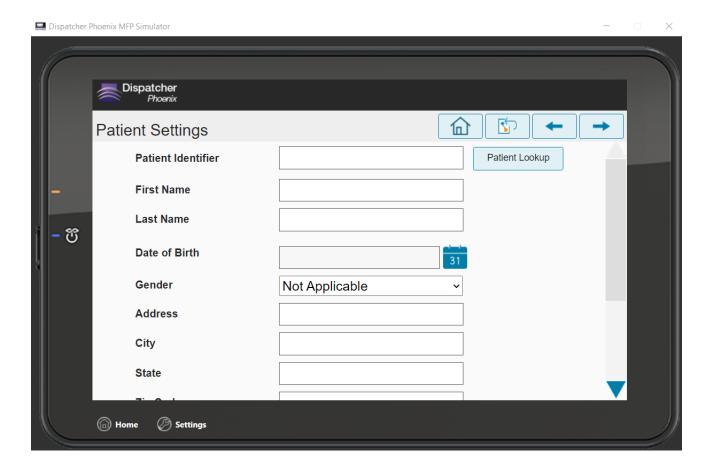
- 1. If the patient information matches a single patient in the Epic server, the node will upload the files.
- 2. If the patient information matches multiple patients in the Epic server, the node will upload the files and produce a warning in the log messages.
- 3. If the patient information does not match any patient in the Epic server, the node will send the files to the error path instead of uploading them and produce an error in the log messages.

Epic Connector at the MFP

When the Epic Connector is configured with an Index Form, the user will be able to enter their account credentials and perform patient lookup at the MFP at the time of document scanning. To use the Epic Connector at the MFP Panel, do the following:

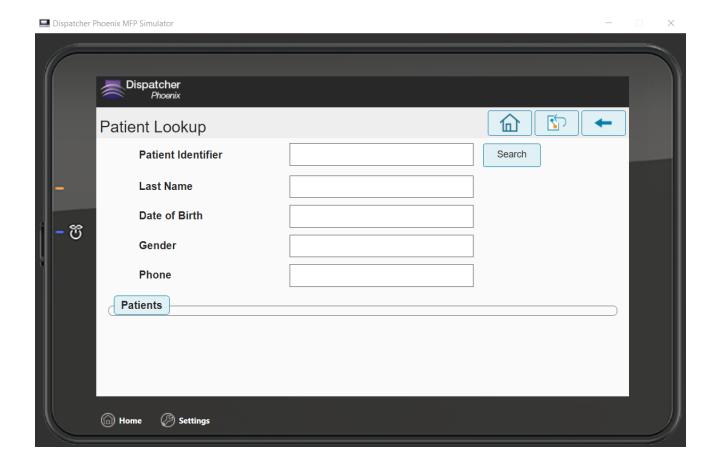
1. At the MFP, open the workflow containing the Epic Connector and the node associated with the Index Form that you have already configured. The Epic Connector will appear, as in the following illustration:

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2. If you would like to use the Patient Lookup feature, tap the **Patient Lookup** button. This will open the Patient Lookup screen, as in the following illustration:

Konica Minolta 999 / 1597



3. Enter the patient's information, as needed. At minimum, you will need to enter:

• Patient ID

OR

· Last Name and Date of Birth

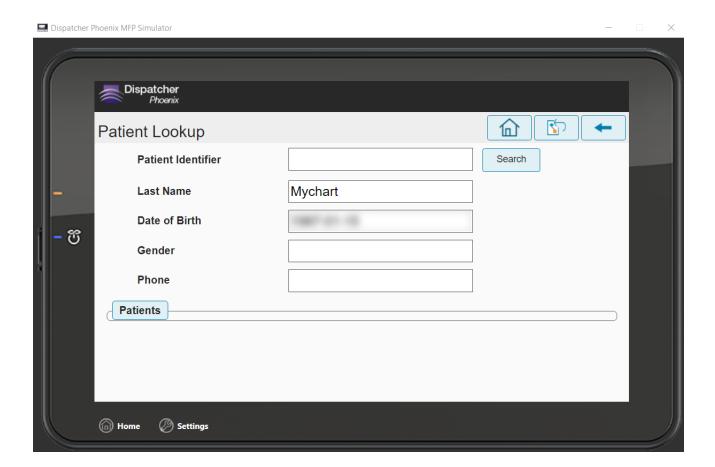
OR

• Last Name, Gender, and Phone

Note: For each option, all fields must be properly filled out to successfully look up patient records.

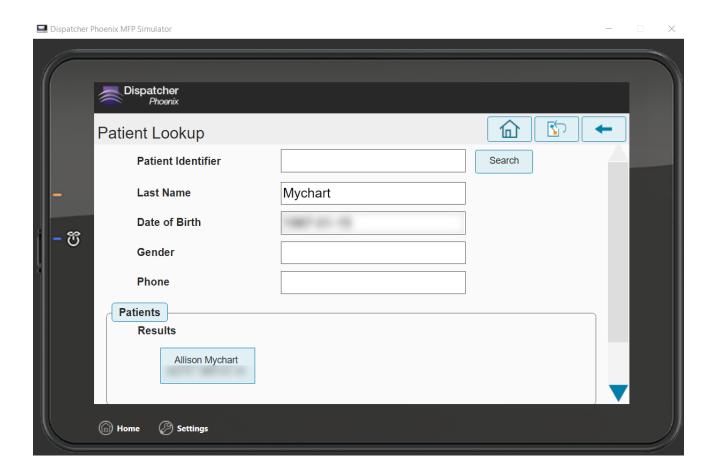
4. Then, tap the Search button, as in the following illustration:

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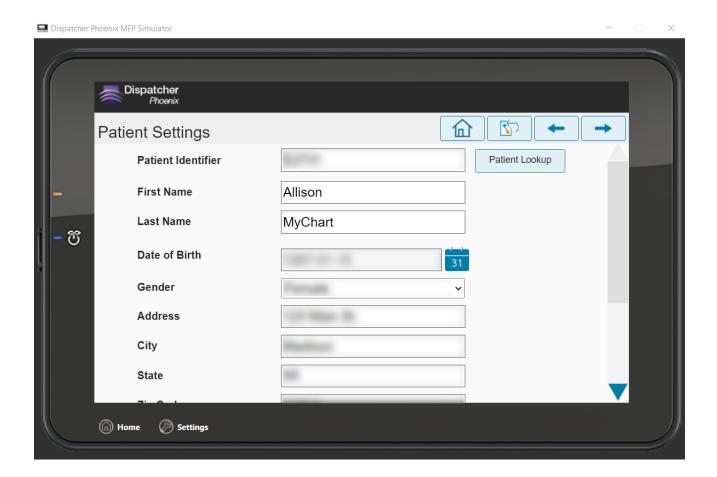
5. If there are any patients whose information matches the information entered, they will appear as buttons at the bottom of the screen, as in the following illustration:

Konica Minolta 1001 / 1597



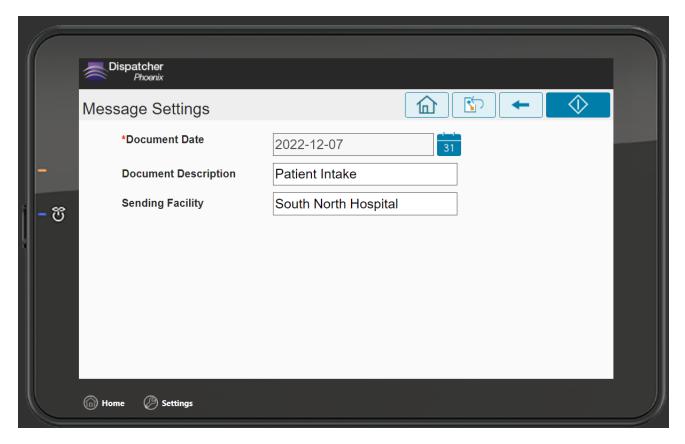
6. This will provide a list of all patients who fit the criteria entered. Tap the one you would like, as in the following illustration:

Konica Minolta 1002 / 1597



7. After selecting the patient or entering a patient's information manually, you can enter any additional information about the document, as in the following illustration:

Konica Minolta 1003 / 1597



Note: The **Document Date** field is required.

FileAssist Connector

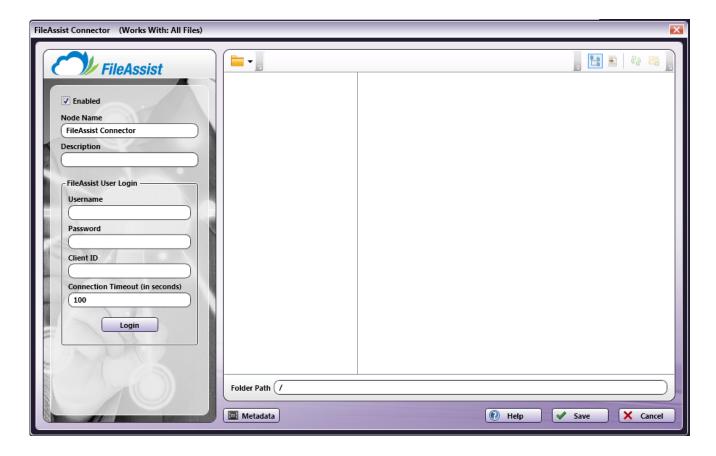


The FileAssist Connector node allows you to distribute documents to FileAssist, Konica Minolta's file hosting service that offers Cloud storage and file synchronization. Documents can be sent to FileAssist via an automated workflow, or you can access FileAssist directly at the MFP panel.

 $\textbf{Note:} \ \ \text{To use the FileAssist Connector, you must have an account with FileAssist.}$

To open the FileAssist Connector node's properties window, add an output node for FileAssist to your workflow and double-click on it.

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- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the FileAssist Connector node.
- In the **Description** field, enter a description for the FileAssist Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the FileAssist Connector

To configure the FileAssist Connector, you must first receive an authorization token from FileAssist to connect to your account; this is done by entering your FileAssist credentials in the node properties window.

Connecting To FileAssist

To begin, you must first enter FileAssist credentials. Do the following:

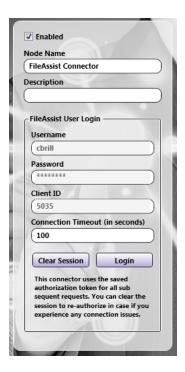
1. In the FileAssist Authorization area's **Username** and **Password** fields, enter your FileAssist credentials (the username used when setting up the account and your FileAssist password) and the Client ID that was assigned to your company.

Note: The Client ID field is required.

When creating an automated workflow (e.g., uploading files from Input Folder to FileAssist automatically), you must log into FileAssist at least once from the FileAssist node properties window in order to receive a valid token from FileAssist.

- 2. Change the seconds allotted for the time without communication (after the initial connection to the server) before a timeout occurs using the **Connection Timeout** field, if necessary. The default timeout value is 60 seconds.
- 3. When you are done, select the **Login** button. Once authorization is successful, a new **Clear Token** button will appear, as in the following illustration:

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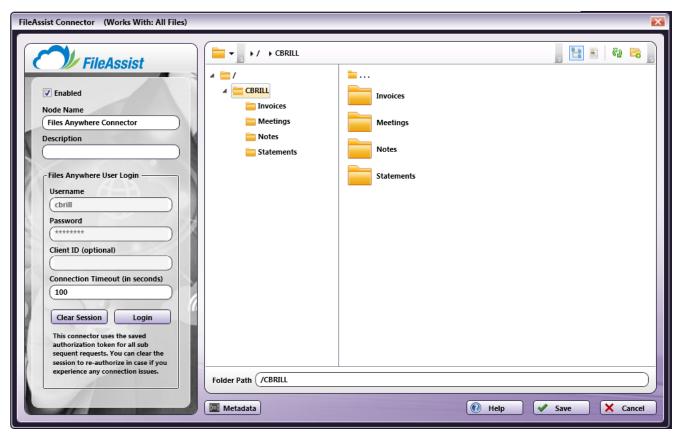


If the token is no longer valid, select the Clear Session button; then select the Login button again.

Selecting A Folder

Once connected, the right hand side of the FileAssist node properties window displays a tree-view of your folders, sub-folders, and files in FileAssist. You can use this area to browse through your FileAssist folder structure and choose a folder to store your documents in.

See the following illustration for an example:



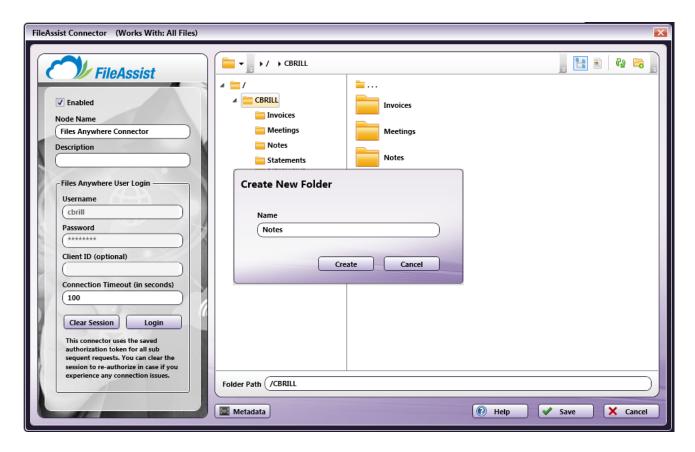
Konica Minolta 1006 / 1597

Sending Documents To A New Folder

You can also choose to create a new folder in FileAssist to send documents to. Do one of the following:

• Select the New folder icon on the top right-hand side of the window (🛜) or press Ctrl + Shift + N.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view. In the following illustration, a new folder called "Notes" is being created:



- Enter a new folder name in the Folder Path field.
- Use metadata to specify a folder path at run time.

For example, you could use zonal OCR to extract client names from incoming documents and then use that OCR metadata in the Folder Path field. In this case, a folder name with the client name will be created in FileAssist and documents will be automatically uploaded to that new folder at run time.

Note: You cannot create a folder within a folder that does not already exist. For example, you cannot use two different metadata variables to create a folder within a folder (e.g., {bates:Counter}/{file:name}).

To use metadata, do the following:

- 1. Select the **Metadata** button to open up the Metadata Browser window.
- 2. On the Metadata Browser window, select the metadata variable you are interested in; then drag-drop it to the Folder Path field.

You may have to manually add the metadata's page number to the variable. For example: $\{ocr:zone.Name\setminus[1\setminus]\}$ would find the metadata on the 1st page. Or, you could add empty brackets (e.g., $\{ocr:zone.Name\setminus[1]\}$) to find the first document-level occurrence of the metadata.

3. Select the Close button on the Metadata Browser window.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)

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• Do not use <> : " / \ | ? *

View Options

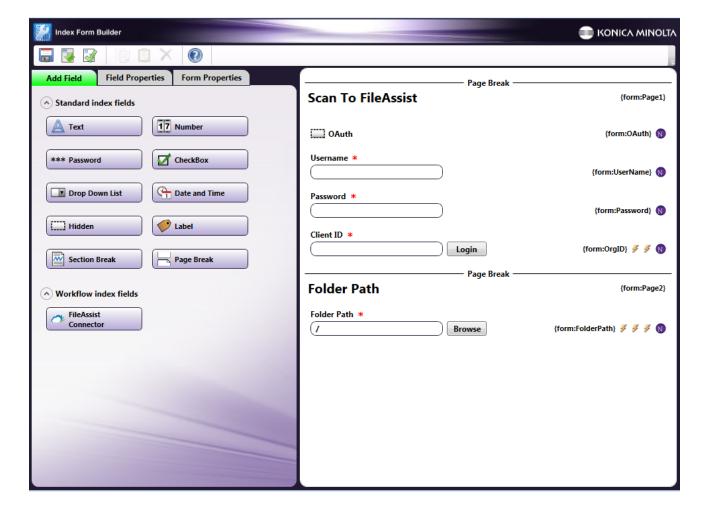
You can adjust the view of your FileAssist folders/files in the node properties window by using the icons on the top right-hand side of the window. Do the following:



Creating A FileAssist Connector Index Form

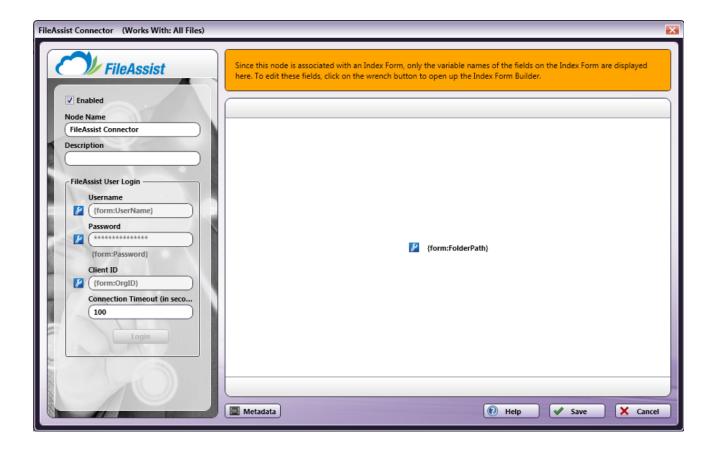
You can create an index form that allows you to log into FileAssist at the MFP and upload scanned documents to FileAssist. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and FileAssist Connector node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see a FileAssist Connector button under the Workflow Index Fields area.
- 3. Drag and drop the **FileAssist Connector** button to the Index Form work area. A Scan to FileAssist index form will automatically appear, as in the following illustration:



- 4. Save and close the Index Form Builder.
- 5. The FileAssist Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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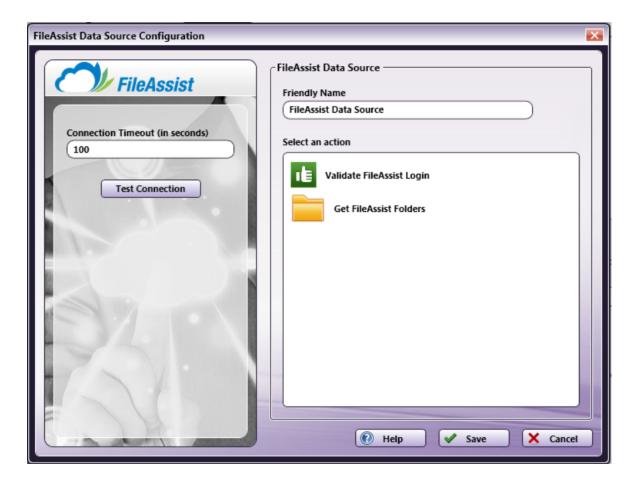
FileAssist Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from FileAssist.

Using the Index Form Builder, do the following:

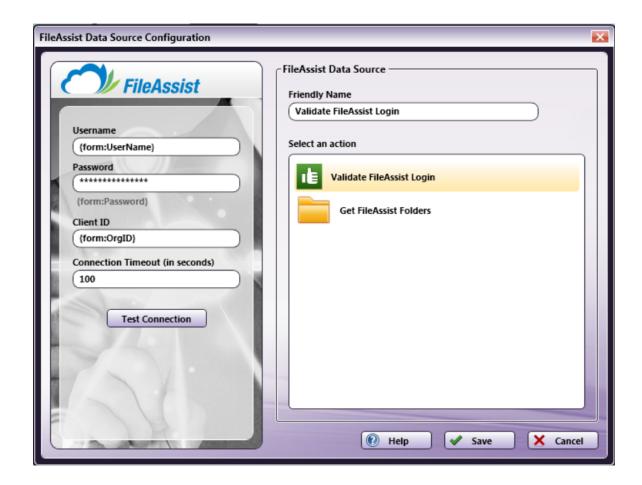
- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose FileAssist Data Source from the Query drop-down list.
- 4. The FileAssist Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from FileAssist.

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- In the **Friendly Name** field, enter an identifying name for the FileAssist data source configuration.
- In the **Action** area, you can choose what kind of action to perform on the FileAssist data source. Options include:
 - Validate FileAssist Login Once you click on this option, you will see Username, Password, and Client ID fields appear in the left-hand side of the window. In the following illustration, these fields are already filled out with Index Form metadata:

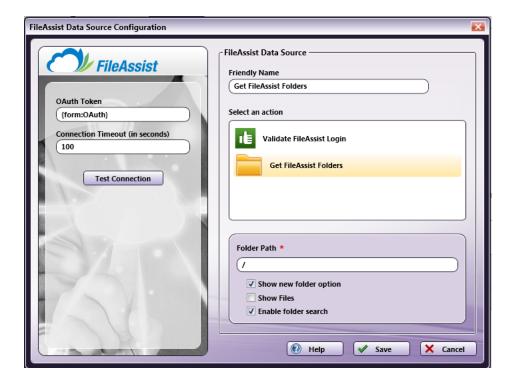
Konica Minolta 1010 / 1597



This option is designed to validate the login credentials that are entered at the MFP (FileAssist Username, Password, and Client ID) against the FileAssist data source. This action returns the following records:

- [result] The result of the login: true or false
- [message] Text regarding a successful or unsuccessful login.
- Get FileAssist Folders Use this action to display a list of folders within a specific FileAssist Folder Path. When you select the Get FileAssist Folders item, new fields will appear for configuration, as in the following illustration:

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- Folder Path Enter the name of the FileAssist root folder that you want displayed at the MFP panel.
- Show new folder option Check this option to allow the user to create a new FileAssist folder at the MFP.
- Show files Check this option to display files in FileAssist folders at the MFP.
- Enable folder search Check this option to display a Search field that can be used to filter the list of FileAssist folders displayed on the panel. Note that the Search field includes type ahead functionality. This option is enabled by default.
- You can select the **Test Connection** button to make sure that you are connected properly to FileAssist.

Using FileAssist Connector Index Form With Multiple Inputs

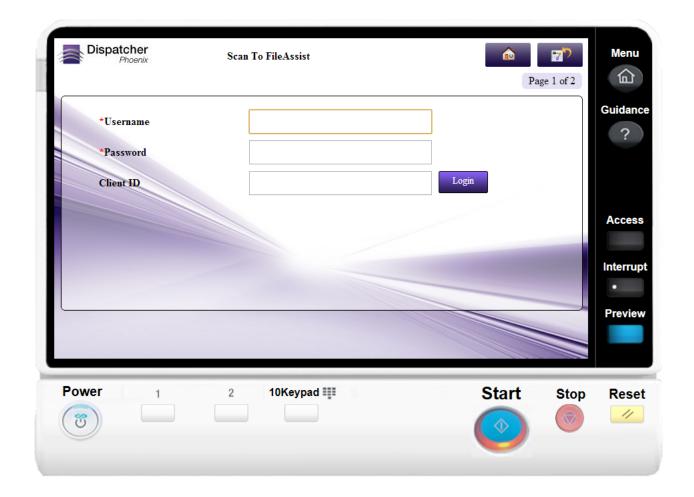
Once you associate your FileAssist Connector node with a MFP Panel node's index form, all the information necessary to connect and route to FileAssist is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed FileAssist Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new FileAssist node that is not connected to an Index Form.

FileAssist Index Form On MFP

At the MFP, the FileAssist Index Form will be separated into three separate screens, as follows:

1st screen: FileAssist Log In

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2nd screen: Choosing A FileAssist Folder / Creating a new FileAssist Folder

Konica Minolta 1013 / 1597



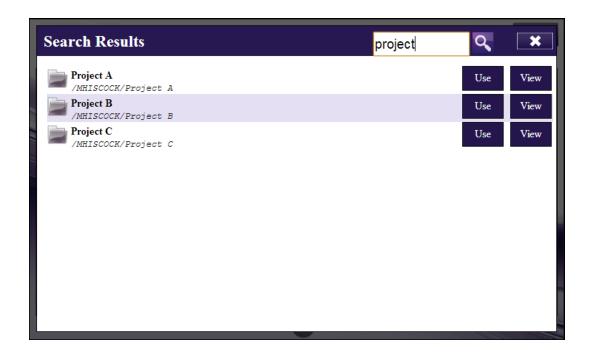
A **Search** field is provided for you to use to narrow the list of folders. This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly. The search operation will be conducted on any folders and sub-folders within the root directory.

- A wildcard asterisk (*) can be used to represent more characters in a string of characters. For example, if entering inv* in the Search field, the folder results would display any folders that *begin* with those three letters (e.g., inv01, inv02, invoice, etc.). Or, if entering *inv in the Search field, the folder results would display any folders that *end* with those three letters (e.g., 01inv, 02inv, etc.)
- A wildcard question mark (?) can be used to represent an arbitrary character. For example, if entering INV0? in the Search field, the folder results would display INV01, INV02, INV03, etc.

Once the folder list is filtered per your search, you can do the following:

- Tap on the **Use** button to select that particular folder.
- Tap on the View button to return to a directory structure view of that particular folder.
- Release the filter by tapping on the **X** button next to the Search field.
- Tap on the **Search** icon next to the field to submit the search criteria again.

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FilesAnywhere Connector

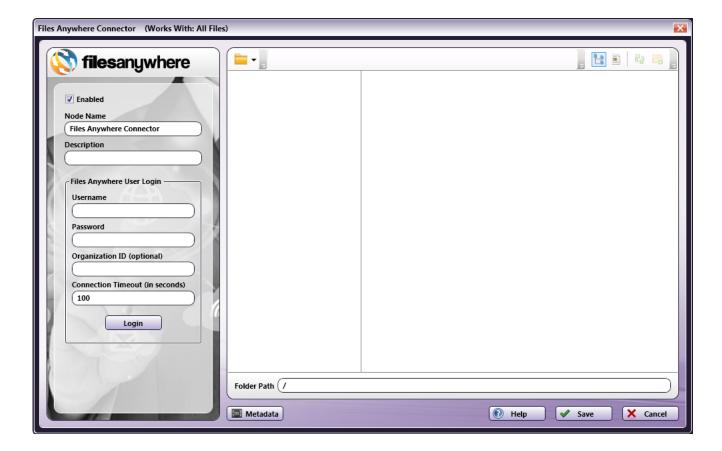


The FilesAnywhere Connector node allows you to distribute documents to FilesAnywhere, a file hosting service that offers Cloud storage and file synchronization. Documents can be sent to FilesAnywhere via an automated workflow, or you can access FilesAnywhere directly at the MFP panel.

Note: To use the FilesAnywhere Connector, you must have an account with FilesAnywhere.

To open the FilesAnywhere Connector node's properties window, add an output node for FilesAnywhere to your workflow and double-click on it.

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- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the $\bf Node\ Name$ field, enter a meaningful name for the FilesAnywhere Connector node.
- In the **Description** field, enter a description for the FilesAnywhere Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the Files Anywhere Connector

To configure the FilesAnywhere Connector, you must first receive an authorization token from FilesAnywhere to connect to your account; this is done by entering your FilesAnywhere credentials in the node properties window.

Connecting to FilesAnywhere

To begin, you must first enter FilesAnywhere credentials. Do the following:

1. In the **FilesAnywhere Authorization area's Username** and **Password** fields, enter your FilesAnywhere credentials (the username used when setting up the account and your FilesAnywhere password) and the Client ID that was assigned to your company.

Note: If you are using a personal FilesAnywhere account, you do not need to enter the Client ID.

When creating an automated workflow (e.g., uploading files from Input Folder to FilesAnywhere automatically), you must log into FilesAnywhere at least once from the FilesAnywhere node properties window in order to receive a valid token from FilesAnywhere.

- 2. Change the seconds allotted for the time without communication (after the initial connection to the server) before a timeout occurs using the **Connection Timeout** field, if necessary. The default timeout value is 60 seconds.
- 3. When you are done, select the **Login** button. Once authorization is successful, a new **Clear Session** button will appear, as in the following illustration:

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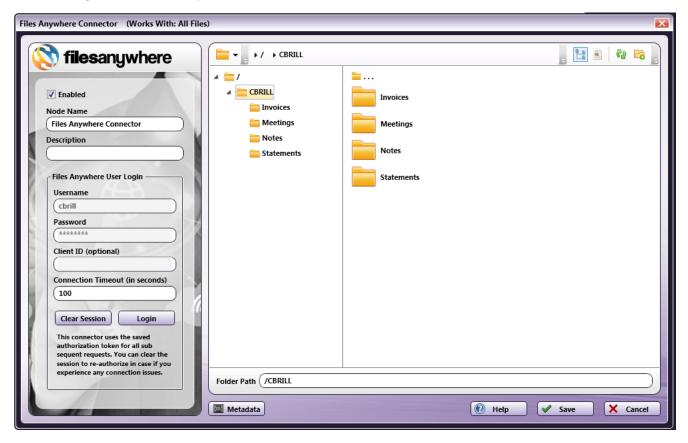


If the token is no longer valid, select the **Clear Session** button; then select the **Login** button again.

Selecting a Folder

Once connected, the right hand side of the FilesAnywhere node properties window displays a tree-view of your folders, sub-folders, and files in FilesAnywhere. You can use this area to browse through your FilesAnywhere folder structure and choose a folder to store your documents in.

See the following illustration for an example:

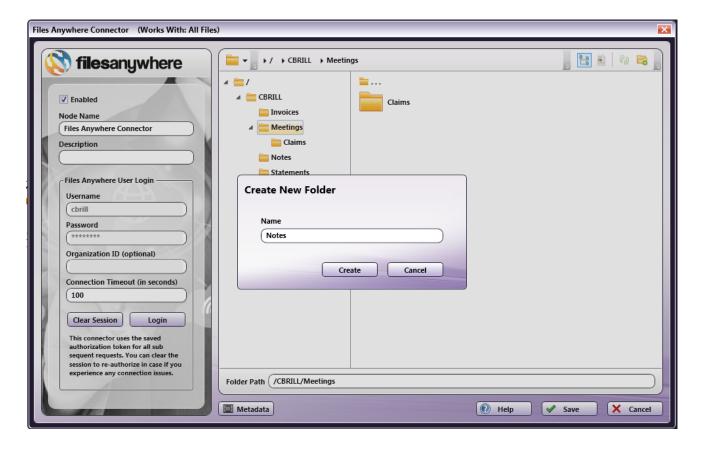


Sending Documents to a New Folder

You can also choose to create a new folder in FilesAnywhere to send documents to. Do one of the following:

• Select the **New folder** icon on the top right-hand side of the window (or press **Ctrl** + **Shift** + **N**. In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view. In the following illustration, a new folder called "Notes" is being created:

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- · Enter a new folder name in the Folder Path field.
- Use metadata to specify a folder path at run time. For example, you could use zonal OCR to extract client names from incoming documents and then use that OCR metadata in the Folder Path field. In this case, a folder name with the client name will be created in FilesAnywhere and documents will be automatically uploaded to that new folder at run time.

Note: You cannot create a folder within a folder that does not already exist. For example, you cannot use two different metadata variables to create a folder within a folder (e.g., {bates:Counter}/{file:name}).

To use metadata, do the following:

- 1. Select the **Metadata** button to open up the Metadata Browser window.
- 2. On the Metadata Browser window, select the metadata variable you are interested in; then drag-drop it to the Folder Path field. You may have to manually add the metadata's page number to the variable. For example: {ocr:zone.Name[1]} would find the metadata on the 1st page. Or, you could add empty brackets (e.g., {ocr:zone.Name[]}) to find the first document-level occurrence of the metadata.
- 3. Select the Close button on the Metadata Browser window.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *

View Options

You can adjust the view of your FilesAnywhere folders/files in the node properties window by using the icons on the top right-hand side of the window. Do the following:



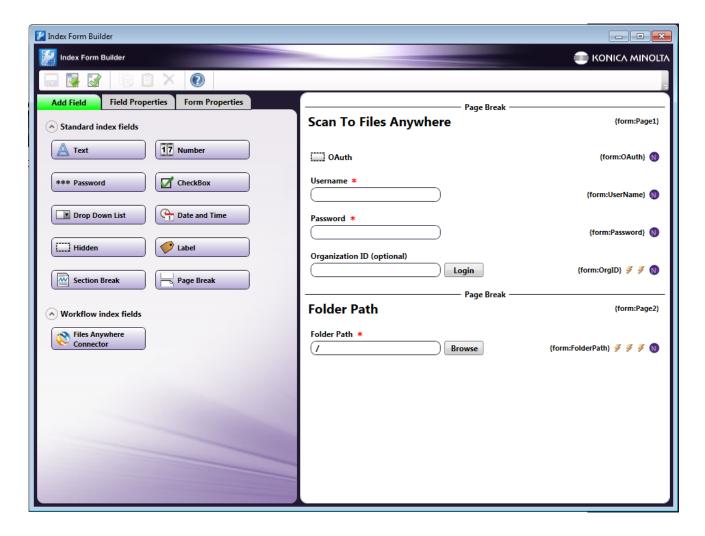
Konica Minolta 1018 / 1597



Creating a FilesAnywhere Connector Index Form

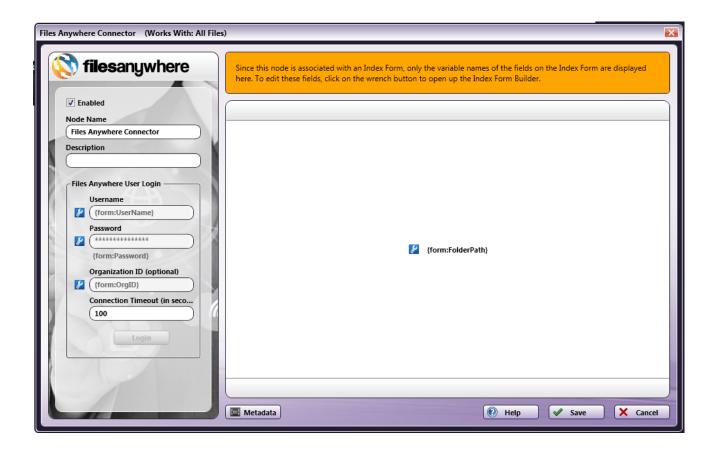
You can create an index form that allows you to log into FilesAnywhere at the MFP and upload scanned documents to FilesAnywhere. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and FilesAnywhere Connector node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see a FilesAnywhere Connector button under the Workflow Index Fields area.
- 3. Drag and drop the **FilesAnywhere Connector** button to the Index Form work area. A Scan to FilesAnywhere index form will automatically appear, as in the following illustration:



- 4. Save and close the Index Form Builder.
- 5. The FilesAnywhere Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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FilesAnywhere Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from FilesAnywhere.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an $\bf On\ Load$ event for the field; then add a $\bf Query.$
- 3. Choose FilesAnywhere Data Source from the Query drop-down list.
- 4. The FilesAnywhere Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from FilesAnywhere.

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- In the Friendly Name field, enter an identifying name for the FilesAnywhere data source configuration.
- In the Action area, you can choose what kind of action to perform on the FilesAnywhere data source. Options include:
- Validate FilesAnywhere Login Once you click on this option, you will see Username, Password, and Client ID fields appear in the left-hand side of the window. In the following illustration, these fields are already filled out with Index Form metadata:



This option is designed to validate the login credentials that are entered at the MFP (FilesAnywhere Username, Password, and Client ID) against the FilesAnywhere data source. This action returns the following records:

- $\[\text{result}\]$ The result of the login: true or false
- \[message\] Text regarding a successful or unsuccessful login.

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Get FilesAnywhere Folders - Use this action to display a list of folders within a specific FilesAnywhere Folder Path. When you select the
Get FilesAnywhere Folders item, new fields will appear for configuration, as in the following illustration:



- Folder Path Enter the name of the FilesAnywhere root folder that you want displayed at the MFP panel.
- Show new folder option Check this option to allow the user to create a new FilesAnywhere folder at the MFP.
- Show Files Check this option to display files in FilesAnywhere folders at the MFP.
- Enable folder search Check this option to display a Search field that can be used to filter the list of FilesAnywhere folders displayed on the panel. Note that the Search field includes type ahead functionality. This option is enabled by default.
- You can select the **Test Connection** button to make sure that you are connected properly to FilesAnywhere.

Using FilesAnywhere Connector Index Form with Multiple Inputs

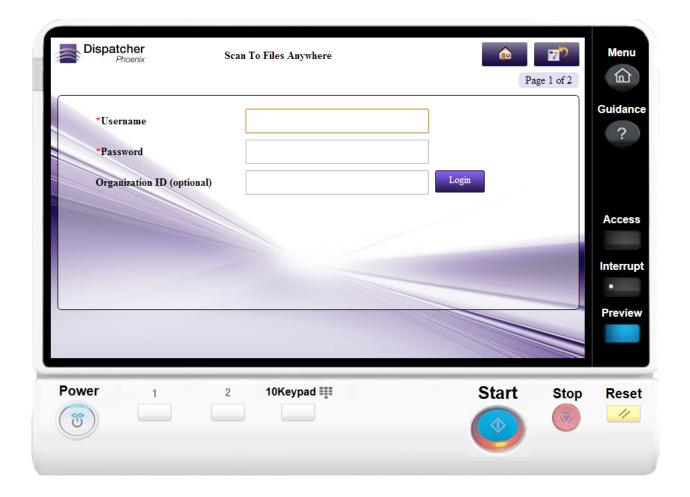
Once you associate your FilesAnywhere Connector node with a MFP Panel node's index form, all the information necessary to connect and route to FilesAnywhere is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed FilesAnywhere Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new FilesAnywhere node that is not connected to an Index Form.

FilesAnywhere Index Form on MFP

At the MFP, the FilesAnywhere Index Form will be separated into three separate screens, as follows:

1st screen: FilesAnywhere Log In

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2nd screen: Choosing a FilesAnywhere Folder / Creating a New FilesAnywhere Folder

Konica Minolta 1023 / 1597

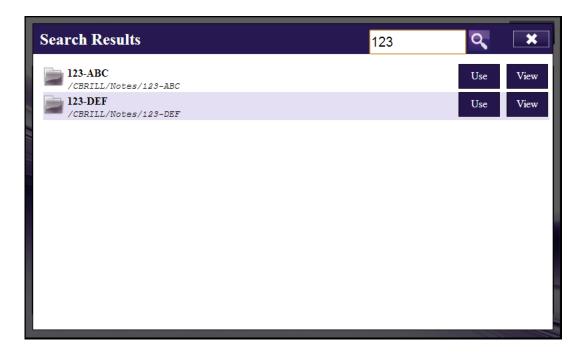


A **Search** field is provided for you to use to narrow the list of folders. This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly. The search operation will be conducted on any folders and sub-folders within the root directory.

- A wildcard asterisk (*) can be used to represent more characters in a string of characters. For example, if entering inv* in the Search field, the folder results would display any folders that *begin* with those three letters (e.g., inv01, inv02, invoice, etc.). Or, if entering *inv in the Search field, the folder results would display any folders that *end* with those three letters (e.g., 01inv, 02inv, etc.)
- A wildcard question mark (?) can be used to represent an arbitrary character. For example, if entering INV0? in the Search field, the folder results would display INV01, INV02, INV03, etc.

3rd screen: Viewing Search Results

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Once the folder list is filtered per your search, you can do the following:

- Tap on the **Use** button to select that particular folder.
- Tap on the **View** button to return to a directory structure view of that particular folder.
- Release the filter by tapping on the ${\bf X}$ button next to the Search field.
- Tap on the **Search** icon next to the field to submit the search criteria again.

Google Drive Connector

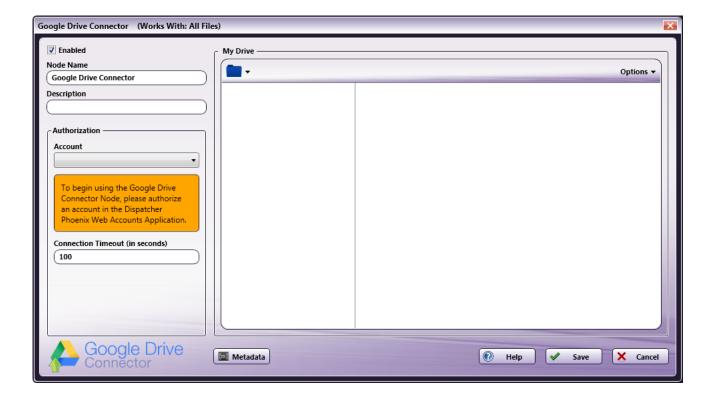


The Google Drive Connector node allows you to distribute documents to Google Drive, a file storage and synchronization service created by Google. Documents can be sent to Google Drive via an automated workflow, or you can access Google Drive directly at the MFP panel.

Note: To use the Google Drive Connector, you must have a Google Drive account.

To open the Google Drive Connector node's properties window, add an output node for Google Drive to your workflow and double-click on it.

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- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the Google Drive Connector node.
- In the **Description** field, enter a description for the Google Drive Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the Google Drive Connector

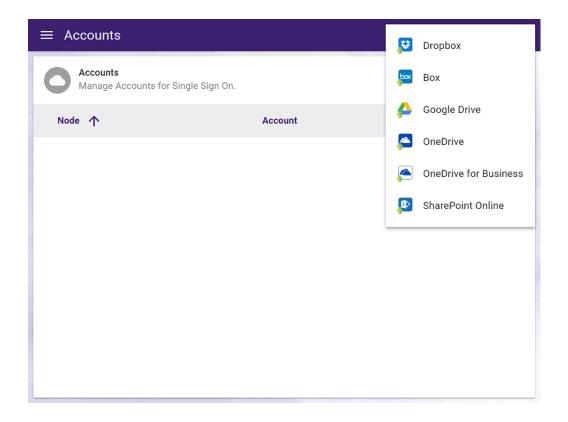
To configure the Google Drive Connector, you must first log into your Google Drive account via Dispatcher Phoenix Web's Authentication Manager. Once this initial set up is completed, logging into Google Drive within the node or at the MFP panel is no longer necessary, providing an optimized single sign on experience.

Set Up

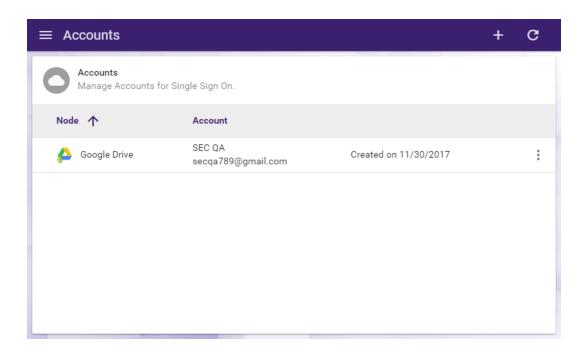
To begin, you must first log into Google Drive via the Dispatcher Phoenix Web's Authentication Manager. Do the following:

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the **Accounts** tool on the Home page.
- 3. On the Accounts page, select the + button and choose the **Google Drive** option. See the following illustration:

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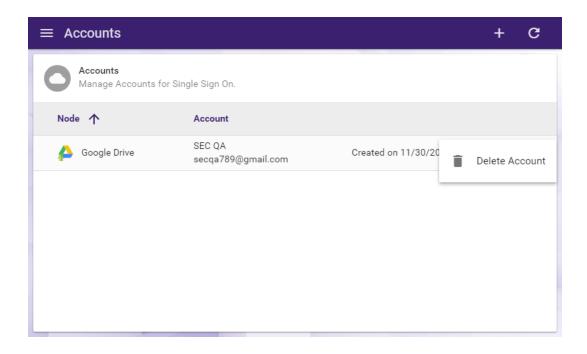


- 4. Log into Google Drive using your account credentials (email address/Google Drive account username and password).
- 5. Select **Yes** if asked for permission to let the application access your info.
- 6. The Google Drive account will now be listed on the Accounts page. See the following illustration for an example:



7. If you need to delete the account, select the vertical ellipsis button and choose **Delete Account**, as in the following illustration:

Konica Minolta 1027 / 1597

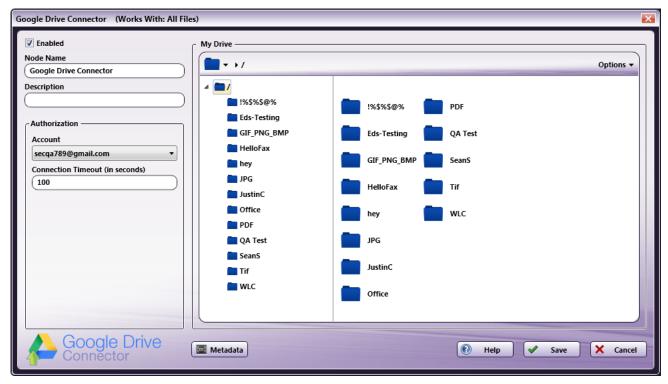


8. If you add multiple accounts, the first account you added will be marked as the Primary Account with a star icon. The benefit of a primary account is that when you sign into the MFP, you will have immediate access to this account. You can switch to a different account at the MFP by selecting the check icon, then selecting the back arrow icon on the next screen. You can also switch your primary account by selecting the vertical ellipsis button and selecting **Enable Primary Account**. You can also **Disable Primary Account** to always be prompted with the account screen at the MFP.

Customizing the Google Drive Connector Node

Once connected, the right hand side of the Google Drive node properties window displays a tree-view of your folders, sub-folders, and files in Google Drive. You can use this area to browse through your Google Drive folder structure and choose a folder to store your documents in.

See the following illustration for an example:



To choose another Google Drive account, choose the account from the **Account** drop-down list.

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To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Sending Documents to a New Folder

To create a new folder in Google Drive to scan to, select the New folder option from the Options drop-down menu or press Ctrl + Shift + N.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view.

File Name Restrictions

The following restrictions apply to file names:

- · File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *

View Options

You can adjust the default view of your Google Drive folders in the node properties window by using the Options button on the top right hand side of the window. Choose the following items from the Options pull-down menu:

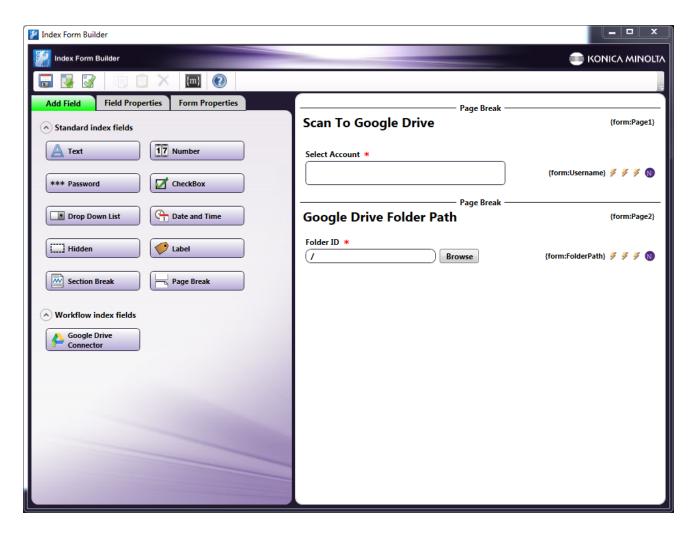
- To turn off the default view, uncheck the **Show tree view** option or press **Ctrl + T**.
- To hide the files stored in Google Drive folders, uncheck the Show files option or press Ctrl + E.
- To refresh the current view with the most up-to-date folders/files, select the Refresh option or press F5.

Creating a Google Drive Connector Index Form

You can create an index form that allows you to log into Google Drive automatically at the MFP. Do the following:

- 1. Make sure that you have logged into Google Drive from Dispatcher Phoenix Web's Account Manager.
- 2. Make sure that your workflow includes a MFP Panel node and Google Drive Connector node.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a Google Drive Connector button under the Workflow Index Fields area.
- 4. Drag and drop the **Google Drive Connector** button to the Index Form work area. A Scan to Google Drive index form will automatically appear, as in the following illustration:

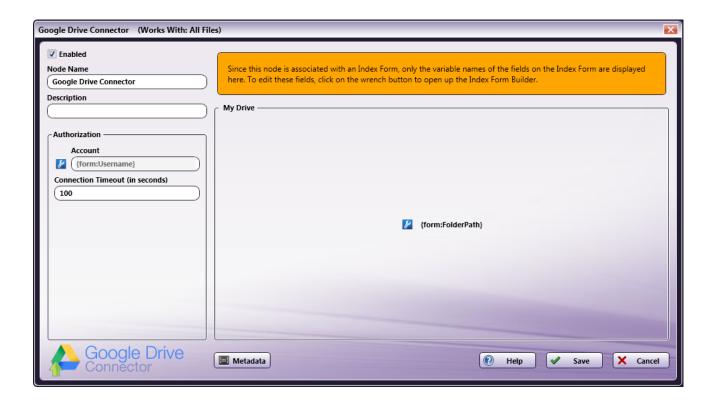
Konica Minolta 1029 / 1597



- 5. Save and close the Index Form Builder.
- 6. The Google Drive Connector node properties window will be automatically populated with the variable names of the fields on the Index Form.

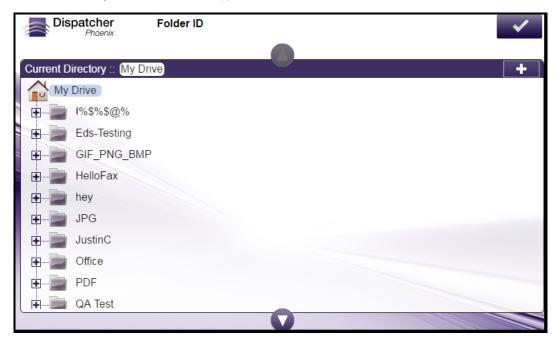
 Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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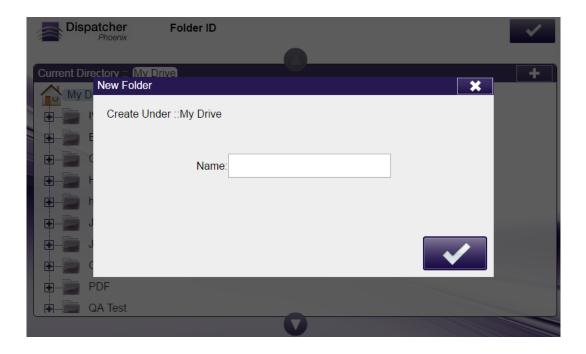
Google Drive Index Form on MFP

At the MFP, the Google Drive Index Form will appear as follows:



You can add a new folder by selecting the + icon at the top of the screen. The **New Folder** window will appear, as shown in the following illustration:

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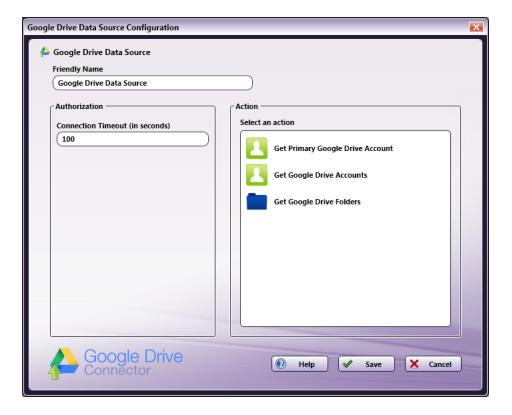
Database Browsing - Google Drive Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from Google Drive.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field; then add a **Query**.
- 3. Choose Google Drive Data Source from the Query drop-down list.
- 4. The Google Drive Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Google Drive.

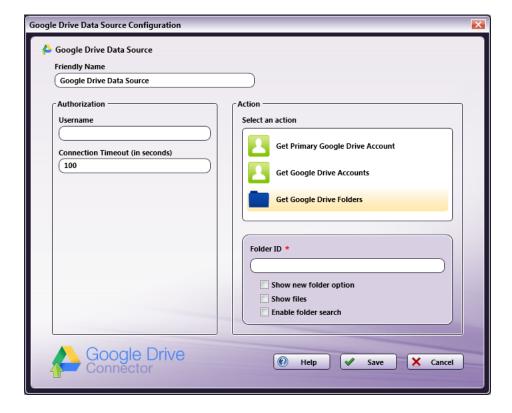
Konica Minolta 1032 / 1597



Do the following:

- In the **Friendly Name** field, enter an identifying name for the Google Drive data source configuration.
- In the Action area, you can choose what kind of action to perform on the Google Drive data source. Options include:
 - Get Primary Google Drive Account This option returns the primary Google Drive account for the user.
 - Get Google Drive Accounts This option returns all the Google Drive accounts for the user.
 - **Get Google Drive Folders** Use this action to display a list of folders within a specific Google Drive Folder Path. When you select the Get Google Drive Folders item, new fields will appear for configuration, as in the following illustration:

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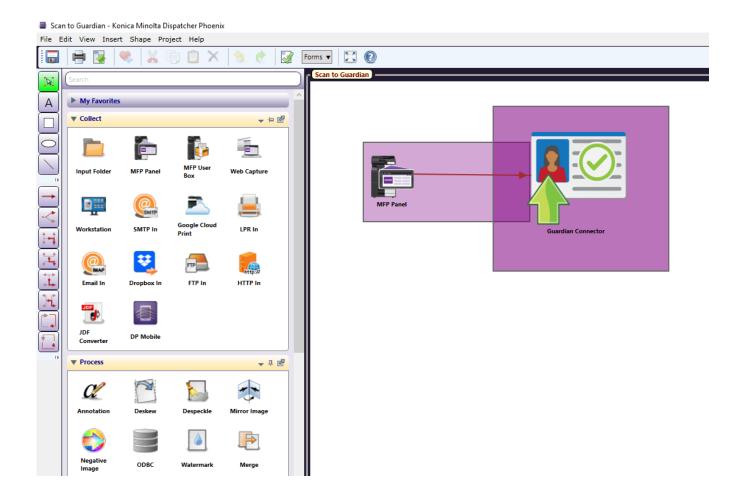
- Folder Path Enter the folder ID of the Google Drive root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new Google Drive folder at the MFP.
 - Show files Check this option to display files in Google Drive folders at the MFP.
 - Enable folder search Check this options to enable folder search at the MFP.

Guardian Connector



The **Guardian Connector** node is used to distribute scanned documents directly to an employee's electronic I-9 record in the Guardian database. Guardian is a solution by LawLogix that helps businesses eliminate audit risk by converting paper I-9 records into electronic I-9 records and storing them in Guardian's online platform for central management. An I-9 form is a government form that must be completed by all employers to document new hires' eligibility to work in the U.S. With Guardian, Human Resources managers can easily track and manage pending I-9s, new employees without I-9s, pending re-verifications and much more. The Guardian Connector should be used in conjunction with a **MFP Panel** collection node, as shown in the illustration below:

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Setting Up the Guardian Connector Workflow

Add a MFP Panel node and Guardian Connector node to your workflow.

Step 1: Configuring The Guardian Connector Node

To open the **Guardian Connector** node, double-click on it.

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Do the following:

- 1. Make sure the **Enabled** box is checked. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be distributed and may be lost.
- 2. In the **Node Name** field, enter a meaningful name for the Guardian Connector node.
- 3. In the **Description** field, enter a description for the Guardian Connector node. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. In the Guardian Connection Settings area, enter the system information for your company's guardian account:
 - In the Connection URL field, enter the identifying URL for your organization's Guardian account.
 - In the Company ID field, enter in your company's unique Guardian ID.
 - In the Company Password field, enter the password needed to successfully login to Guardian.
 - Click the **Test Connection** button to test the connection with Guardian.
- 5. Select the **Save** button to keep your Guardian Connector settings. You can also select the **Help** button to access online help or select the **Cancel** button to exit the window without saving any changes.

Step 2: Create a Guardian Connector Index Form

Next, create a Guardian index form. This allows users to scan into Guardian from an MFP. Do the following:

- 1. Make sure that you have configured your Guardian Connector node with the Connection URL, Company ID, and Company Password.
- Open up the Index Form Builder from the MFP Panel node and select Blank Index Form. You should then see two Guardian Connector buttons under the Workflow index fields area:
 - Use the Guardian Connector index form to allow a user to view a comprehensive list of pending I-9's at the MFP.
 - Use the **Guardian Connector with I-9 Lookup** index form to allow a user to search the Guardian database for the pending I-9 record at the MFP.
- 3. Drag and drop a **Guardian Connector** index form to the Index Form work area. A Scan to Guardian index form will automatically be created, as in the following illustration:

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The Guardian Connector node properties for **Connection URL**, **Company ID**, and **Company Password** will be auto-populated in the index form.

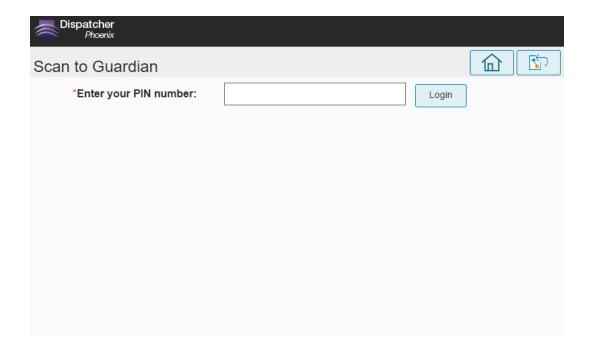
4. Save and close the Index Form Builder.

Step 3: Scanning to Guardian from the MFP

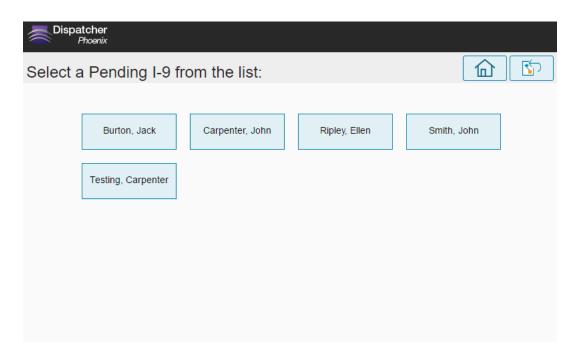
At the MFP, users can log into Guardian and scan their pending I-9 documents. Do the following:

- 1. Access your Scan to Guardian workflow.
- 2. Enter your Guardian PIN #.

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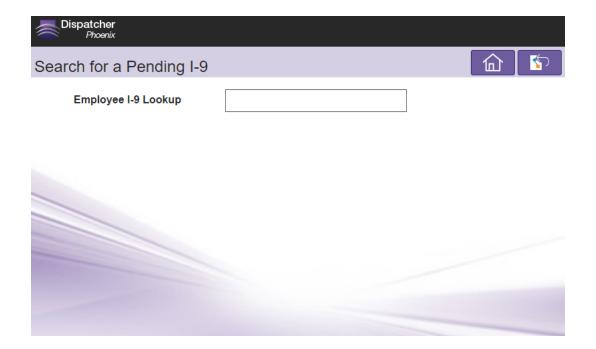


3. Select the employee record for which you'd like to upload an I-9 document. If using the **Guardian Connector** index form, pending I-9 records are automatically displayed for the user who as authenticated into the MFP, as seen in the following illustration:

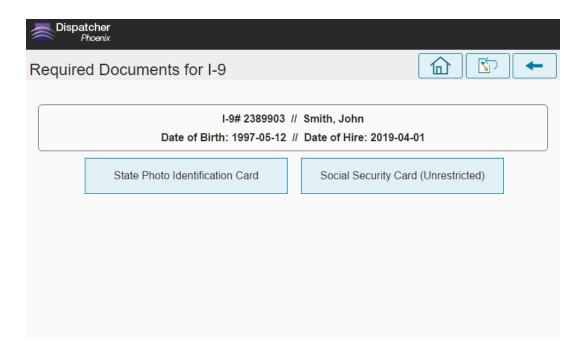


4. If the **Guardian Connector with I-9 Lookup** index form is being used, the user will be prompted to Search Guardian for the pending I-9 record, as in the following illustration:

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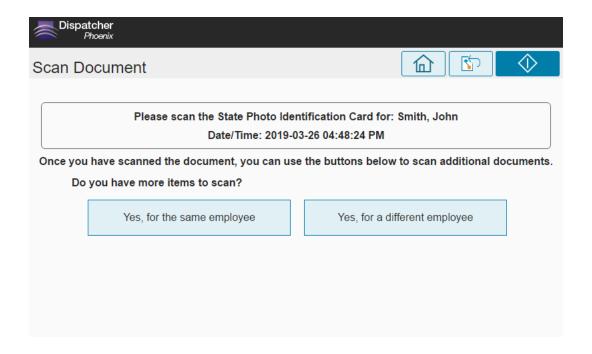


5. Select the document type that you will scan for upload to Guardian. A document that has been previously uploaded to the platform will show a green check mark icon (check) next to the document name. A document that has been scanned and is in the process of being uploaded to Guardian will show an hourglass icon ().



6. Once the scan operation has been completed, you can choose to navigate back to the same employee record to upload another document using the **Yes, for the same employee** button. Or, use the **Yes, for a different employee** button to navigate back to the list of pending I-9s as shown in the following illustration:

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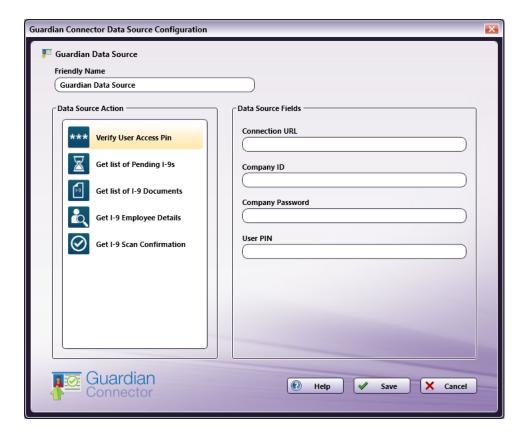
Configure for Database Browsing

You can also manually configure a query to retrieve data (e.g., list of pending I-9's, I-9 documents, I-9 employees details, etc.) from Guardian.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Notified** and **On Selection Change** event for the field; then add a **Query**. For more information on building custom index forms, **click here**.
- 3. Choose **Guardian Data Source** from the **Query** drop-down list.
- 4. The Guardian Connector Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Guardian. See the following illustration for an example:

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- 5. In the Friendly Name field, enter an identifying name for the Guardian data source configuration.
- 6. In the Data Source Action area, you can choose what kind of action to perform on the Guardian data source. Options include:
 - Verify User Access Pin This option enables authentication by a user at the MFP.
 - Get List of Pending I-9's This option returns all of the Guardian record's pending I-9 information.
 - Get list of I-9 Documents Use this action to display a list of I-9 documents needed for a particular employee's record.
 - Get I-9 Employee Details This option returns the relevant employee details prior to the scan operation.
 - Get I-9 Scan Confirmation Use this action to display a list of options once an I-9 Document is scanned.
- 7. Select the **Save** button to keep your Guardian Connector Data Source Configuration. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Laserfiche Connector



The **Laserfiche Connector** node is used to distribute processed documents into a monitored folder for collection by Laserfiche's Enterprise Content Management (ECM) platform. The node creates an LST file that captures document information formatted in XML along with a copy of the original document. These files are then stored in a folder that is monitored by Laserfiche.

An LST file is a Data List file and pertains to various kinds of information used by multiple types of programs, including Laserfiche. A typical LST file contains a list of information, separated by line breaks, and are normally viewable in plain text format which allows them to be edited by a basic text editor. The files exported by Dispatcher Phoenix will contain data that will be transferred to Laserfiche.

Note: On some operating systems, the UTF16 encoding does not allow users to open the created XML files from the Laserfiche Connector in Google Chrome or Internet Explorer.

To open the **Laserfiche Connector** node, add a distribution node for Laserfiche to the workflow, then double-click on it.

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Do the following:

- 1. Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- 2. In the Node Name field, enter a meaningful name for the Laserfiche Connector node.
- 3. In the **Description** field, enter a description for the Laserfiche Connector node. Although this is not required, it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. In the **Monitored Folder File Settings** area, select the box next to **Overwrite Output File** to overwrite files with the same name in the Monitored Folder.
- 5. In the **Output Actions** area, specify the following options:
 - From the **On Document Conflict** drop-down list, choose the action Laserfiche will perform if a document in Laserfiche already exists with the outgoing document's name. Options are:
 - Overwrite the existing document with the new document.
 - Merge the two documents together.
 - Make Unique to store the document with a new, unique name.
 - From the On Folder Conflict drop-down list, choose the action Laserfiche will perform if a folder in Laserfiche already exists with the same name as the target folder.
 - Overwrite the existing folder with the new folder.
 - Merge the two folders together.
 - Make Unique to create a folder with a new, unique name.
 - From the **Output Type** drop down, select how files are submitted to the Laserfiche Import Agent. Options are:
 - A Batch LST file will be created containing information on all of the submitted files.
 - An Individual List (LST) file type will be created for each file going through the Dispatcher Phoenix Workflow.
- 6. In the **OCR Settings** section, select the box next to **Enable OCR**. By selecting this option, Laserfiche will OCR the document when it is imported by the Laserfiche Import Agent.
- 7. In the **Monitored Folder and Repository Setup** area, specify the following configuration:
 - In the Laserfiche Monitored Folder Path field, choose the Windows directory to which the generated LST files containing Laserfiche XML data will be sent to.
 - In the Laserfiche Target Repository field, enter the path to the target folder in the Laserfiche repository to which the document will be
 uploaded.
- 8. In the $\bf Metadata~\bf Settings$ area, do the following:

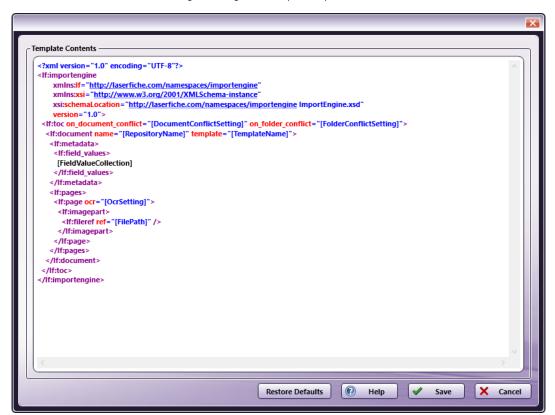
Konica Minolta 1042 / 1597

- In the **Template Name** field, enter the name of the Laserfiche template to be used. This template must already exist on the Laserfiche server.
- Click the + button to add a field entry to the template.
- In the field **Name**, enter a relevant name for the document/entry field. This is the document metadata. Names of fields are defined in the template.
- In the field Value, enter a value for the field. Or, use the Metadata button at the button of the configuration window to open the Metadata Browser. Then, drag-and-drop the metadata key into the field value.
- In the field Type, use the drop down to select the type of the value being entered into the field. Options are:
 - Text
 - Number
 - Currency
 - Date
 - Phone
- 9. Select the Manage Template button to enter custom changes to your Laserfiche template or restore the template to its default settings.
- 10. Select the **Send Test File** button to generate a sample LST file containing a sample document and send it to the configured monitored folder to verify that both Dispatcher Phoenix and the Laserfiche applications are configured correctly.
- 11. Select the **Save** button to keep your Laserfiche Connector settings. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Managing Laserfiche Templates

To successfully route files to Laserfiche from a Dispatcher Phoenix workflow, an XML template is required. This XML template contains all of the information Laserfiche will need in order to properly index and store the document within your content structure.

Each Laserfiche Connector node will begin with a generic template to pass information to Laserfiche, as illustrated below:



To edit this template:

- Select the ${\bf Manage\ Template}$ button from the Laserfiche Connector configuration window.
- Enter custom changes using XML to your Laserfiche template.

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- If you'd made changes by mistake or wish to restore the template to its default settings, click the Restore Defaults button at the bottom of the Template Contents window.
- Select the **Save** button to keep your Laserfiche Connector settings. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

M-Files Connector



M-Files Connector

The M-Files Connector node for Dispatcher Phoenix allows for a seamless connection with M-Files, a unique intelligent information management solution that improves how businesses secure, process, and manage data and content. The M-Files Connector node accelerates document management at the MFP by allowing users to easily:

- · upload documents
- · add class descriptions
- · add document properties, and more

This guide provides a step-by-step description of how to set up the node, several typical use cases, and basic troubleshooting.

M-Files is unique in its approach to document storage. Unlike most information management solutions, M-Files does not utilize folder trees; all documents are stored on the same level. M-Files documents contain additional information, called classes and properties, which are added by the user. Users can then search and sort documents by their class and property.

There are four main ways to set up an M-Files workflow:

- 1. **Fully-Automated** All settings are pre-configured. The user can only scan a single document type and cannot change properties at the MFP panel.
- 2. **Department or M-Files Service User Indexing** Most settings are pre-configured. The user can specify the document Class and specify the pre-configured document Properties at the MFP panel.
- 3. **User Account Indexing** Some settings are pre-configured. The user must sign in at the MFP to select their Vault, document Class, and to specify pre-configured document Properties at the MFP panel.
- 4. **Custom Indexing** Similar to Fully-Automated in that all settings are pre-configured, but with pre-configured default and Additional Properties that can be added and modified to meet the needs of your document uploads.

The M-Files Connector also supports Workflows and Workflow States. If an M-Files Document has a required Workflow, it is automatically selected for you. Workflows are editable, even when they are configured as "required" and prefilled. The M-Files Connector automatically sends the document to the first Workflow State. You can also select the Workflow and Workflow State during node configuration or at the MFP at scan time.

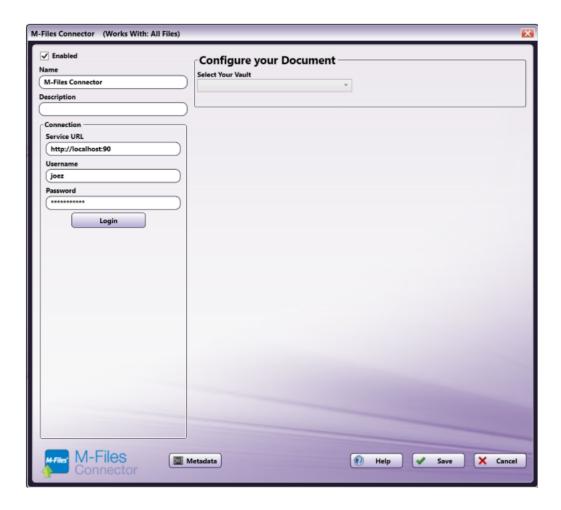
Note: You may only select a Workflow State that is considered a "first step." Generally, there is only one "first step" to select for the Workflow State.

Configuring an M-Files Server

To utilize the M-Files Connector, the user must first connect to the M-Files server. Do the following:

- 1. Open the M-Files node.
- 2. In the Connection area, enter the following information:
 - In the M-Files "Server URL" field, enter the URL of the M-Files server.
 - In the "Username" and "Password" fields, enter the username and password that is used to connect to the M-Files server.
 - Click the **Login** button to verify the connection credentials.
- 3. If the connection is successful, the "Configure your Document" area appears, as in the following illustration:

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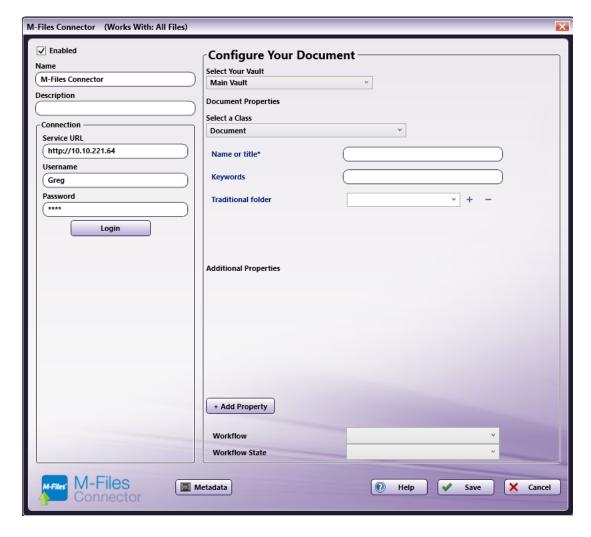


Fully-Automated Workflow Configuration

With a fully-automated workflow configuration, an administrator would configure the M-Files Connector to scan documents to a specific location in M-Files with standard document classes and properties. The user would scan their document into a pre-configured workflow and would not have the capability to specify a vault or edit the document class or properties at the MFP panel. This will most commonly be used for repetitive scanning and uploading tasks with no customization needed. To set up a fully-automated workflow configuration, do the following:

- 1. Open the M-Files node.
- 2. Select the Vault from the drop-down list of all available Vaults. If only one Vault is available, the configuration for the Vault is static.
- 3. Select a document **Class** from the drop-down list of all available document Classes. The list of Classes is pre-configured by the M-Files administrator. After selecting the Class, the document **Properties** will populate, as in the following illustration:

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Notes:

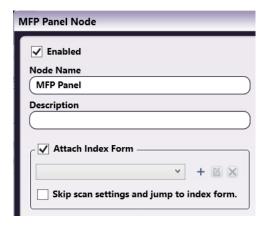
- · Properties marked with an asterisk are required.
- Document Properties are dependent on the document Class and will only populate after the Class has been selected.
- For this case, since the Properties are pre-configured, the user is not able to add any additional properties at the MFP. Users will only be able to add information to the Properties that have been pre-configured.
- 4. Select the **Workflow** and **Workflow State** from the dropdown, if needed. After selecting a **Workflow**, the first **Workflow State** will automatically populate, though you can select a different state as needed.
- 5. Click **Save** to save the configuration and close the node.

Department or M-Files Service User Indexing Workflow Configuration

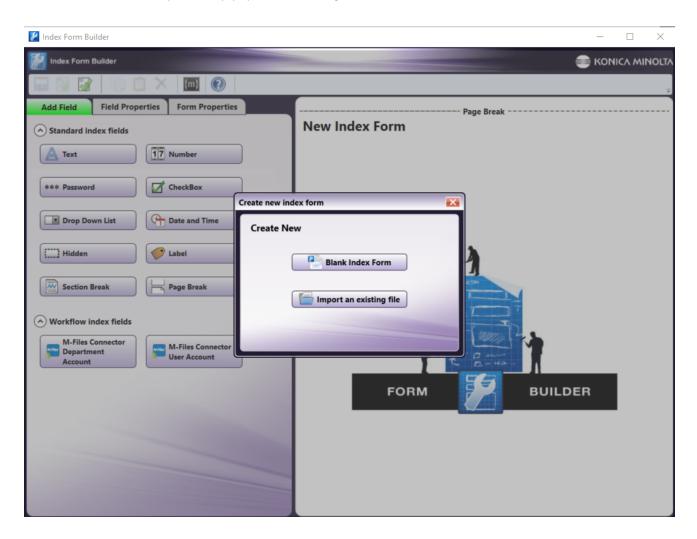
In the department indexing configuration, the administrator will configure the M-Files Connector node with an M-Files Service account to capture scanning documents and their associated properties. Utilizing this configuration, users will not be prompted to log in to their M-Files Account at the MFP Panel. The user will also be able to configure the document Class and Properties at the MFP Panel during the scanning process. To set up a department indexing workflow, do the following:

- 1. Create a new workflow with an MFP Panel node and the M-Files Connector.
- 2. Configure the M-Files node according to the Configuring an M-Files Server section.
- 3. Open the $\boldsymbol{\mathsf{MFP}}$ $\boldsymbol{\mathsf{Panel}}$ node.
- 4. Click the **checkbox** next to Attach Index Form and then the + icon to open the Index Form Builder, as in the following illustration:

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5. Select the **Blank Index Form** option in the pop-up, as in the following illustration:



6. You will then see the Blank Index Form Builder, as in the following illustration:

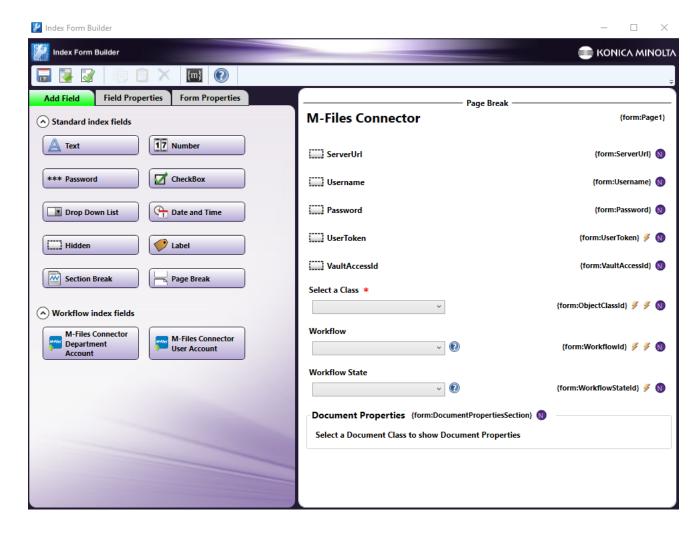
Konica Minolta 1047 / 1597



Note: The M-Files Workflow index fields will only populate if the M-Files Connector is placed in the workflow prior to opening the Index Form Builder. The M-Files Connector Department Account Index Form will only appear after an administrator has entered the ServerURL, username, and password and selected the appropriate Vault for the department/service user in the M-Files node.

7. Drag the **M-Files Connector Department Account** icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

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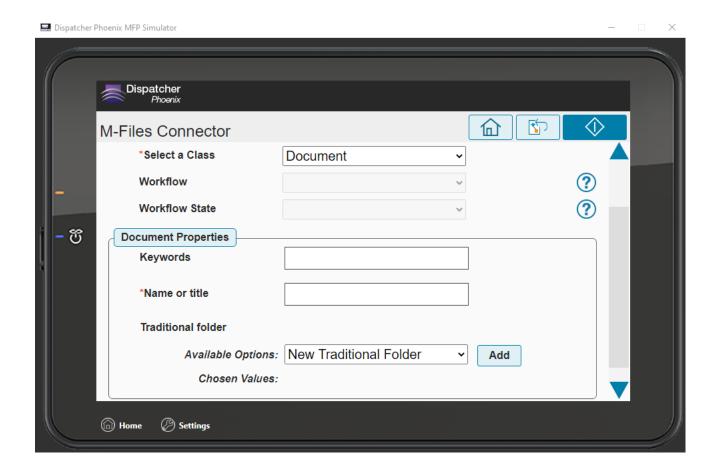


Note: Fields with the dotted outline - such as ServerUrl, Username, Password, UserToken, and VaultAccessId in the illustration - are hidden fields. They are pre-configured by the M-Files Administrator in the M-Files node and will not appear on the MFP to the user.

8. Validate, Save, and close the Index Form Builder.

Note: At the MFP panel, the user will have the ability to select a **Class** from a preconfigured list, which will populate fields for **Keywords**, **Workflow, Workflow State**, and **Name**, as in the following illustration:

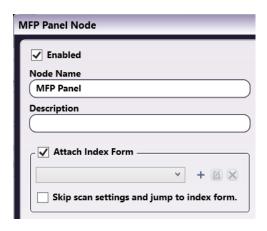
Konica Minolta 1049 / 1597



User Account Indexing Workflow Configuration

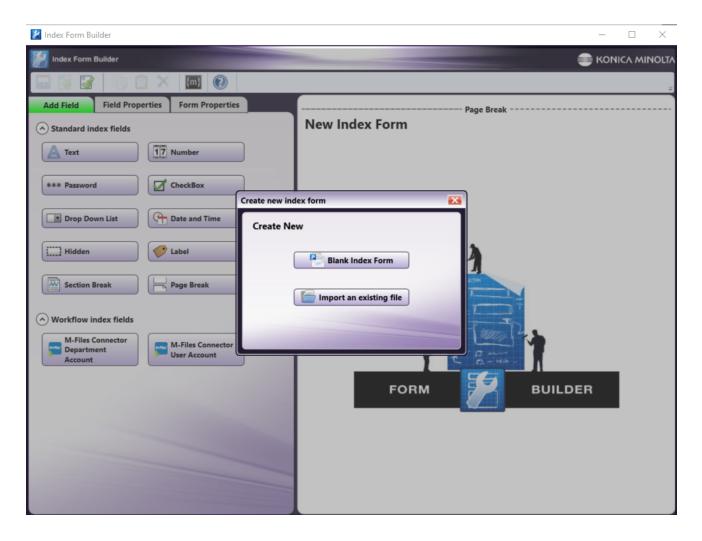
In the user account indexing configuration, the user will utilize the User Account Index form, which will convert the standard node configuration values to metadata that is entered by the user at the MFP panel. For this configuration, the user will be prompted to log into their M-Files account at the MFP before they begin their scanning and indexing. To set up a user account workflow, do the following:

- 1. Create a new workflow with an MFP Panel node and the M-Files Connector.
- 2. Configure the M-Files node according to the Configuring an M-Files Server section.
- 3. Open the **MFP Panel** node.
- 4. Click the checkbox next to "Attach Index Form" and then the + icon to open the "Index Form Builder", as in the following illustration:



5. Select the $\bf Blank\ Index\ Form\$ option in the pop-up, as in the following illustration:

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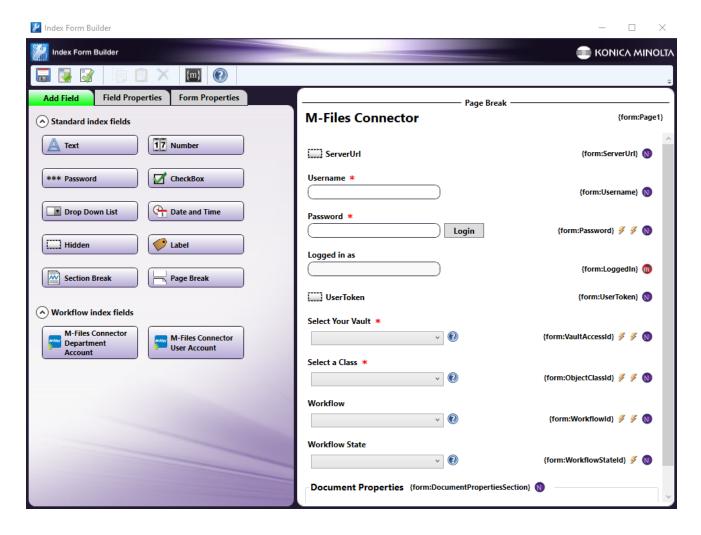
 ${\bf 6.}$ You will then see the Blank Index Form Builder, as in the following illustration:

Konica Minolta 1051 / 1597



7. Drag the **M-Files Connector User Account** icon to the "New Index Form" Form Builder area. Several fields will populate, as in the following illustration:

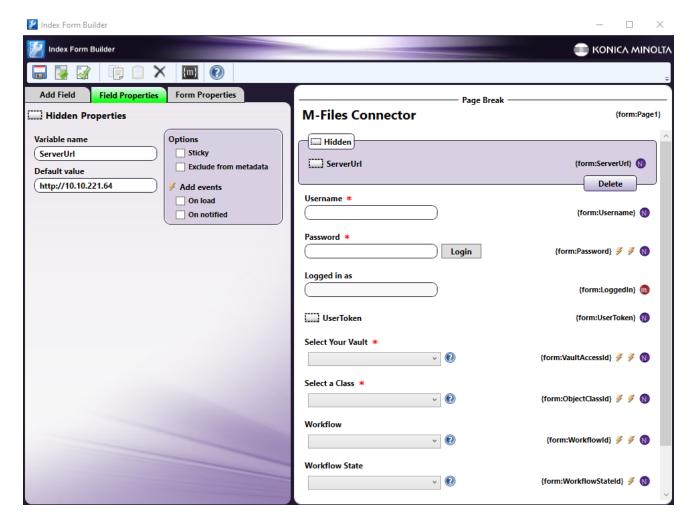
Konica Minolta 1052 / 1597



Note: Fields with the dotted outline - such as ServerUrl in the illustration - are hidden fields set up by the M-Files Administrator. They will not appear on the MFP to the user.

8. Click the **ServerURL** area to open the "Field Properties" editor. Enter the M-Files server URL into the "Default Value" field, as in the following illustration:

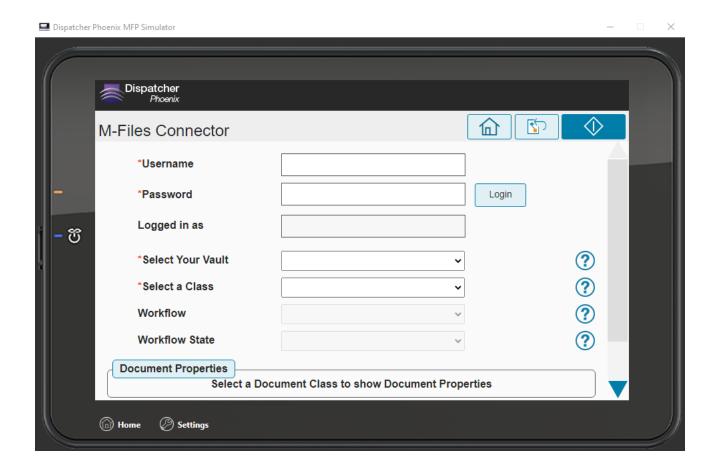
Konica Minolta 1053 / 1597



9. Validate, Save, and close the Index Form Builder.

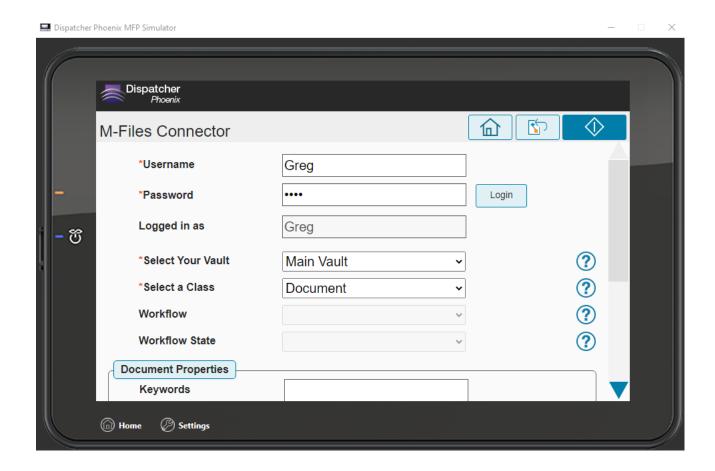
Note: At the MFP panel, the user will be prompted to sign in using their M-Files Username and Password, as in the following illustration:

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Note: The user will enter their **Username** and **Password** in the required fields and click **Login**. After a successful login, the username will populate in the "Logged in as" field. The user will then be able to select their **Vault** and **Class**. After selecting a Class, the document **Properties** will populate, including **Workflow** and **Workflow State**, as in the following illustration:

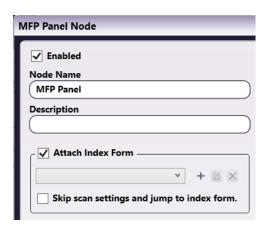
Konica Minolta 1055 / 1597



Custom Indexing Workflow Configuration

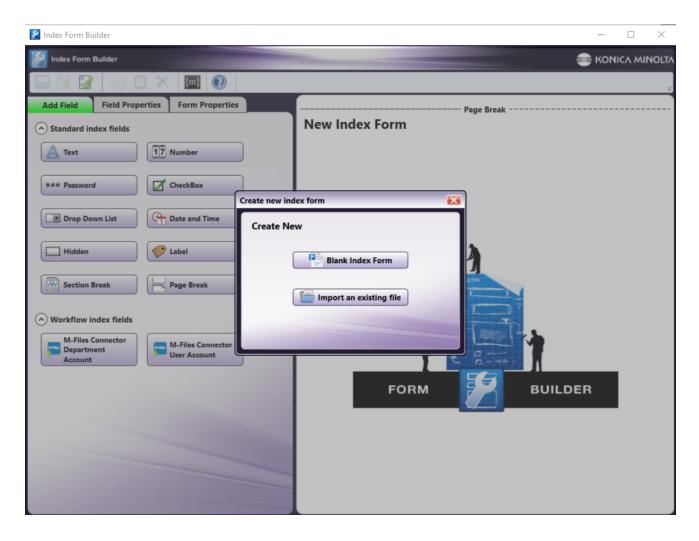
Utilizing a custom indexing workflow, the administrator will be able to create a unique indexing experience for the users. In this case, the administrator will configure the M-Files Connector node to accept Document Property and Additional Property values via metadata. The user will be able to enter all M-Files Document Property information at the MFP panel. To set up a custom workflow, do the following:

- 1. Create a new workflow with an MFP Panel node and the M-Files Connector.
- 2. Configure the M-Files node according to the Configuring an M-Files Server section.
- 3. Open the MFP Panel node.
- 4. Click the checkbox next to "Attach Index Form" and then the + icon to open the "Index Form Builder", as in the following illustration:



5. Select the **Blank Index Form** option in the pop-up, as in the following illustration:

Konica Minolta 1056 / 1597



6. Click **Blank Index Form**. You will see the Blank Index Form Builder, as in the following illustration:

Konica Minolta 1057 / 1597

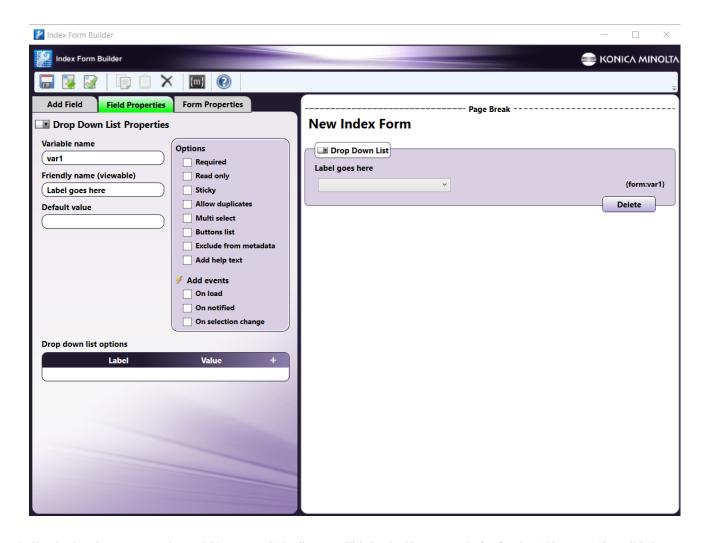


7. Drag a **Drop Down List** to the "New Index Form" Form Builder area.

Note: The instructions below (Steps 8-15) will demonstrate the process of adding fields that populate with metadata. Specifically, the user will be able to add up to two Additional Classes to a document. Exact form setup will vary based on use case.

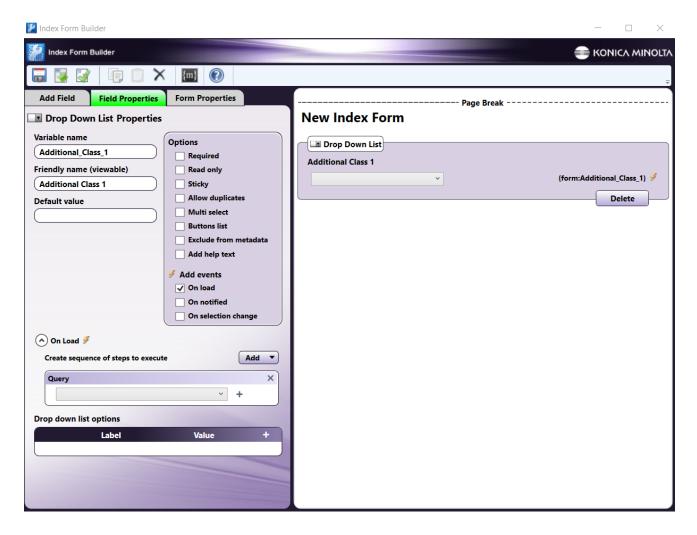
8. Click the **Drop Down List** to open its Field Properties, as in the following illustration:

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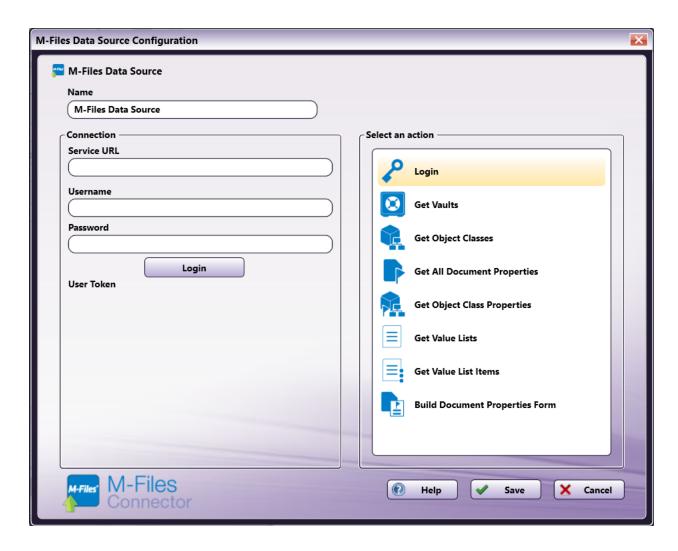
9. Give the drop-down an appropriate Variable name and Friendly name. Click the checkbox next to **On load** under "Add events." Then, click the **Add** drop-down menu and select **Query**, as in the following illustration:

Konica Minolta 1059 / 1597



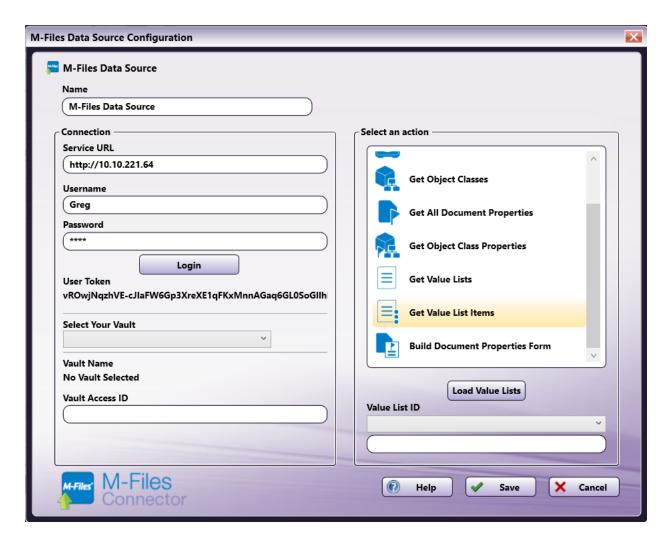
10. Click the + icon next to the Query drop-down (as shown in the previous illustration), and select **M-Files Data Source**. This will open the "M-Files Data Source Configuration" window, as in the following illustration:

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11. Enter the Service URL, Username, and Password, and click the **Login** button. This will generate a User Token. In the "Select an action" area, select **Get Value List Items**, as in the following illustration:

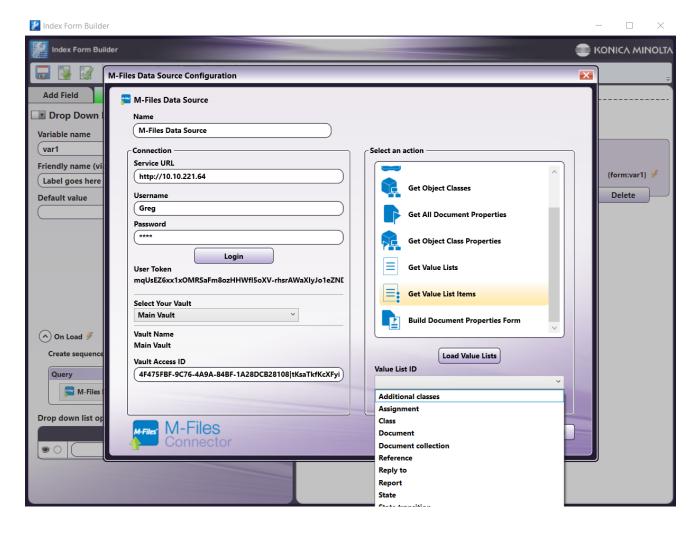
Konica Minolta 1061 / 1597



Note: Users may have to reselect the item when selecting an action.

12. Select your Vault from the "Select Your Vault" drop-down menu. Then, click **Load Value Lists** to populate the Value List ID. Select the **Value List ID** you wish to add, as in the following illustration:

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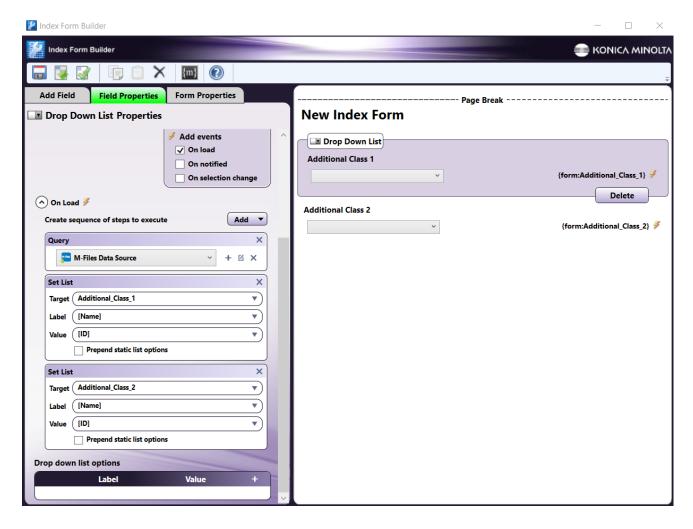


13. Click Save to save and close the M-Files Data Source Configuration window.

Note: If you save the configuration and reopen the Query to edit it, you will have to login again.

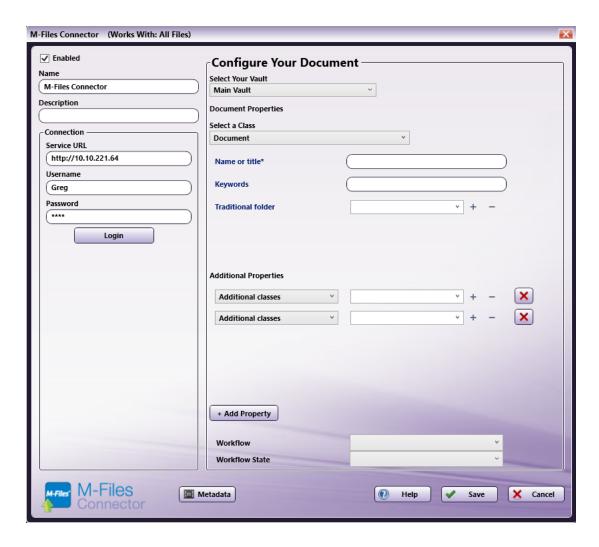
14. In the Index Form Builder, click the **Add** drop-down again and select **Set List**. Do this a second time to add a second set list. Set the Targets to the Variable names of the two drop-downs, set the Label to [Name], and set the Value to [ID], as in the following illustration:

Konica Minolta 1063 / 1597



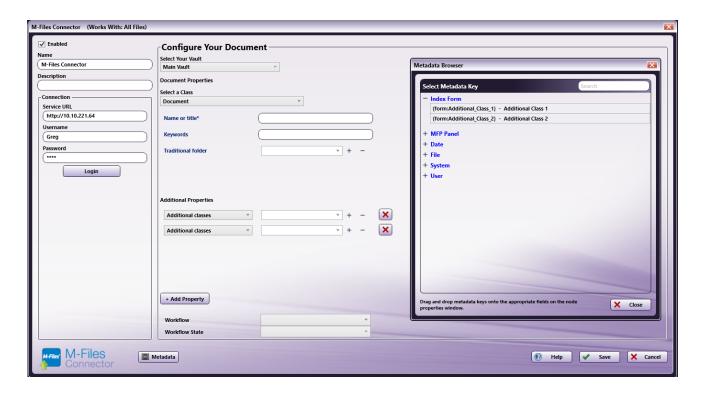
- 15. Validate and save the Index Form Builder.
- 16. Double-click the M-Files Connector to open it.
- 17. Enter your login credentials and select the same vault you selected in step 12.
- 18. In the "Additional Properties" section, click the + Add Property button twice.
- 19. In the dropdown for each Additional Property, select "Additional Classes."

Konica Minolta 1064 / 1597

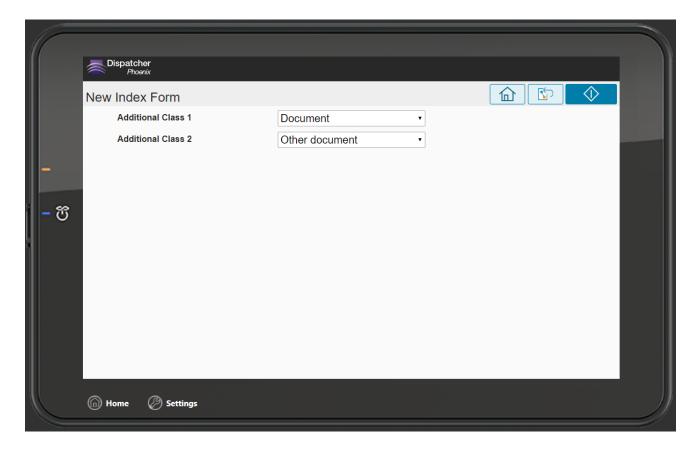


20. Click the **Metadata** button at the bottom of the window. This will open the Metadata Browser. Click **Index Form** and drag the first metadata variable to the empty space next to the first "Additional Classes" property in the M-Files Connector window. Drag the second metadata variable into the empty space next to the second "Additional Classes" property.

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- 21. Save your changes, validate the workflow, save and exit the workflow.
- 22. At the MFP panel, the user will be able to add up to two different Additional Classes from drop-down menus, as in the following illustration:



Notes:

• The M-Files Connector also supports metadata from OCR nodes in all lookup fields.

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- When performing the lookup to create a dropdown list within M-Files using OCR metadata, the node will automatically trim leading and trailing whitespace from the metadata value and the property from the M-Files server, convert them both to lowercase, and compare the OCR metadata value to the M-Files property data to find the most accurate match.
- If an appropriate property cannot be found in the M-Files server, either because one does not exist or because of spelling differences, then the workflow will log a warning and attempt to upload the document without that property. This may potentially generate an error if the field is marked as **Required**.
- Since M-Files stores Properties based on ID numbers, it is possible that a Property Name that is numeric can have the same value as a
 different Property ID. In this case, the M-Files Connector will default to match the ID number and display the Property associated with that
 ID.
- If there are multiple Properties with the same name, each will have a different ID associated with it. In this case, the M-Files Connector will default to using the data associated with the numerically first ID.
- It may be useful to configure the Index Form in a similar manner to the User Account Indexing Index Form. However, it is important to not use that pre-built form as a basis, as the Additional Properties and other features are turned off for the pre-built index forms. The administrator setting up the workflow must start from a Blank Index Form.
- If an administrator creates a new M-Files Vault or adjusts a user's permissions, the changes may take up to 24 hours to appear in the M-Files Node or in the Index Form Builder. However, these changes will be reflected in the M-Files Node and in the Index Form Builder after an administrator restarts the M-Files web service within IIS.

OnBase Connector



The OnBase Connector node allows you to store and retrieve documents and other data to an OnBase database. Documents can be sent to OnBase via an automated workflow, or you can log into OnBase, set OnBase attributes, and enter keywords for the documents directly at the MFP panel.

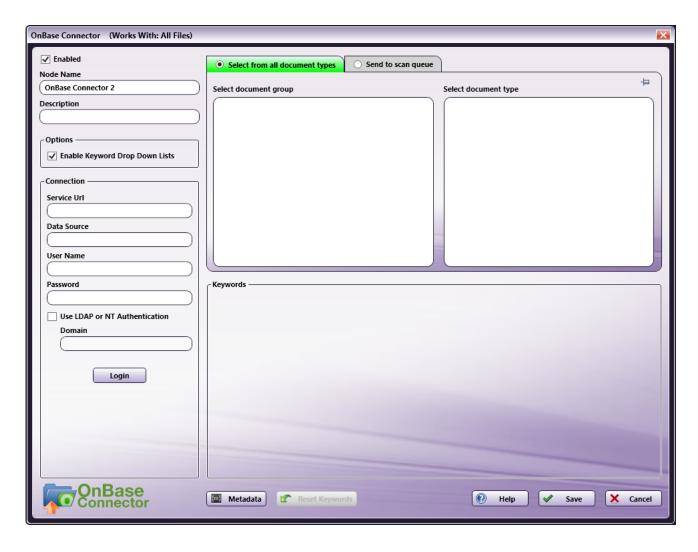
Requirements include:

- Supported Versions: Hyland OnBase Server Components version 12.0.3.227 and above.
- License Installed: The "Integration for Konica Minolta Dispatcher Phoenix" license must be purchased from Hyland Software and installed into the OnBase database.
- Scan Size: The maximum scan size supported is 100 MB. If the scanned document exceeds this maximum, a message will appear, alerting the user of this limit.

Important! Please ask your OnBase Administrator to confirm the version of Hyland OnBase Server Components installed since the version of your OnBase Client or OnBase Unity Client could be different. If you have any questions, please contact your OnBase Administrator or Hyland Support Representative.

To open the OnBase node's properties window, add an output node for OnBase to your workflow and double-click on it.

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- Check the **Enabled** box when using this node. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the OnBase node.
- In the **Description** field, enter a description for the OnBase node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Options** area, check the **Enable Keyword Drop Down Lists** box to display a drop down list for Keyword Types configured as drop down lists on the OnBase server. This box is checked by default. Note that this option can only be enabled/disabled while not logged in.

Connecting to OnBase

To begin, you must first connect to OnBase. In the Connection area, do the following:

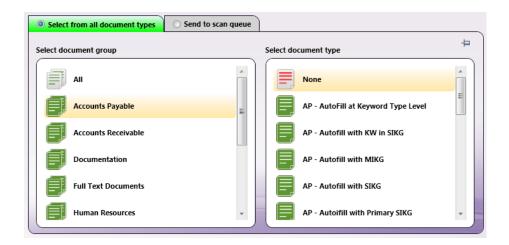
- 1. In the **Service URL** field, enter the URL of the OnBase application server.
- 2. In the **Data Source** field, enter the name of the ODBC data source used by the OnBase application server to connect with the OnBase database. This field is optional.
- 3. In the User Name and Password fields, enter the user name and password that is used to connect to the OnBase server.
- 4. Check the Use LDAP or NT Authentication box to enable LDAP/NT authentication.
- 5. If LDAP/NT authentication is enabled, you must enter the domain to use when logging onto OnBase via LDAP/NT authentication in the **Domain** field.
- Select Login to verify the connection credentials. If the credentials are correct, the available document groups will appear in the Select document group box.

Classifying Documents

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• Select from all document types - If this tab/radio button is selected, available document groups will appear in the Select document group box. Document groups are used in OnBase to organize similar document types together and are usually associated with an organizational unit or department within an organization.

Once you select a document group, a list of associated document types will appear in the adjacent column, as in the following illustration. The document type controls the keyword fields that are available for indexing. Once you select a document type, a list of associated keyword fields that are available for that specific document type will appear, and the Select document group and Select document type boxes will automatically collapse.



You can disable the auto-collapse feature for these two boxes by clicking the thumbtack icon

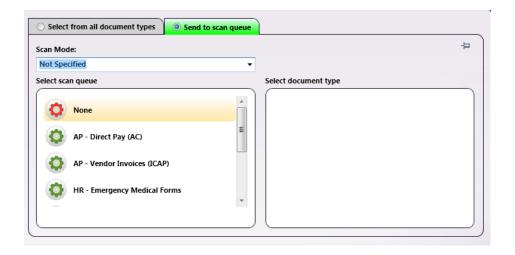
Note: Mandatory OnBase fields will not be displayed as "required" in Dispatcher Phoenix for both "Manager" and "Admin" users since they have privileges for those kind of keywords (required, hidden, and read-only).

See the following illustration for an example:



• Send to scan queue - If this tab/radio button is selected, available scan queues will appear in the Select scan queue box. An OnBase scan queue is predefined for specific document processing and indexing. See the following illustration:

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For OnBase 16 or newer servers, you can choose a scan mode from the **Scan Mode** drop-down list, allowing you to configure the initial indexing status of documents that are entering a scan queue. You can choose:

• **Not Specified.** If this option is selected, no Scan Mode will be sent to the OnBase Server. The OnBase server will then use the default scan mode of "Full Index." This option should be used for OnBase Servers version 15 or older.

Note: If you choose any scan mode option other than "Not Specified" for OnBase 15 or older, the workflow will fail to process the document.

- No Index. Select this option to perform manual indexing after documents have been scanned to OnBase. The uploaded documents will be
 in OnBase's Awaiting Index state without a document type or keywords associated to them. If this option is selected, the Select document
 type and Keywords section will be empty (since they are not applicable).
- **Pre-Index.** If this option is selected, you can specify the Document Type and enter Keywords. The uploaded documents will be in OnBase's Awaiting Index state.
- **Full Index.** If this option is selected, you can specify the Document Type and enter Keywords; however, the uploaded documents will bypass any indexing queues and move to OnBase's Awaiting Commit state. This is the default behavior.

Note: The states listed above are based on a default configuration. The actual state may change based on the OnBase configuration (e.g., selecting the Full Index option may send uploaded documents to the Awaiting Advanced Capture state if that option is selected for the Scan Queue).

- The Scan Mode feature supports metadata. Users can enter a metadata key manually or by dragging-dropping metadata from the Metadata Browser window onto the field. You can open up the Metadata Browser by clicking on the **Metadata** button at the bottom of the window. The metadata selected must contain one of the following values:
 - NotSpecified (for the Not Specified scan mode option)
 - NoIndex (for the No Index scan mode option)
 - PreIndex (for the Pre-Index scan mode option)
 - FullIndex (for the Full Index scan mode option)
- Once you select a scan queue from the Select scan queue column, a list of associated document types will appear in the adjacent column.
 Once you select a document type, a list of associated keyword fields that are available for that specific document type will appear, and the Select scan queue and Select document type boxes will automatically collapse. To disable this auto-collapse feature, click on the thumbtack icon on the left-hand side of the screen.

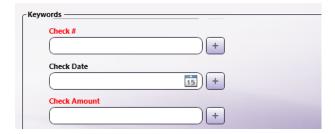
Keywords

You can enter values for keyword fields that are associated with the document type that you've selected.

Notes:

- Metadata You can click on the Metadata button to open up the Metadata Browser window and drag-and-drop metadata variables into the Keyword fields, if desired.
- Required keywords Required keywords are displayed in red, as in the following illustration:

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- Duplication/Cloning You can duplicate keyword fields numerous times in Dispatcher Phoenix's OnBase Connector node and also at the MFP
 panel. Do the following:
 - To duplicate a keyword field in Dispatcher Phoenix, put the cursor in the keyword field that you would like duplicated and either click the + button or press **F6**.
 - To duplicate a keyword field on the MFP panel, press the + button next to the field.

Duplicating Fields In Dispatcher Phoenix:



Duplicating Fields On MFP:



• Autofill - OnBase can auto populate keyword fields based on the first value entered. For example, if a keyword is entered at the MFP panel, other keywords associated with that document type can be auto-populated based on a query that uses the first field's values.

Keyword fields that can be used to auto-populate other fields will have an **Autofill** button next to them. You can enter a specific value in that keyword field; then click the **Autofill** button to auto populate other keyword fields. See the following illustrations:

Autofill In Dispatcher Phoenix:



Autofill on MFP:



• **Nested sections** - Keywords can be grouped into sections that can be expanded and collapsed by clicking on the arrow button next to the section name. Sections can be duplicated by clicking on the + button next to the section name. See the following illustration of a nested section on the Dispatcher Phoenix OnBase node properties window:

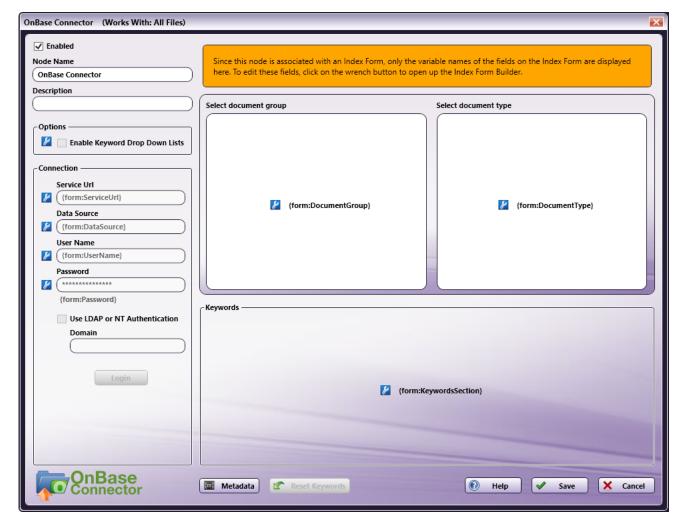
Konica Minolta 1071 / 1597



- Reset Keywords Click on the Reset Keywords button to clear all the keyword entries that have been entered.
- Validate Keywords When you click on the Save button in Dispatcher Phoenix or the Scan button on the MFP, the keywords will be validated against the OnBase server. If a validation error occurs, OnBase will return an error message. Note that this validation will not occur in Dispatcher Phoenix if metadata is used.
- Date Keywords Date keywords require a date format of YYYY-MM-DD. For example, 2013-03-01 is March 1, 2013.

Using with Index Form

When using the OnBase node on an Index Form, the window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:



Using OnBase Index Form with Multiple Inputs

Konica Minolta 1072 / 1597

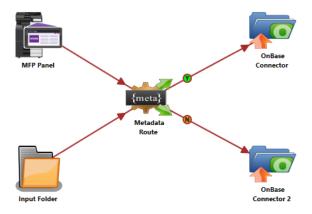
Once you associate your OnBase Connector node with a MFP Panel node's index form, all the information necessary to connect and route to OnBase is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed OnBase Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new OnBase node that is not connected to an index form. See the following illustrations for examples:

Example 1. In this illustration, OnBase configuration is entered at the MFP panel AND files are automatically collected from an Input Folder and routed to a predefined OnBase server:





Example 2. In this illustration, the Metadata Route node is used to determine which OnBase node the files should go to. All files that come from the MFP Panel node automatically go to the indexed OnBase node; all other files are routed to the other OnBase node:

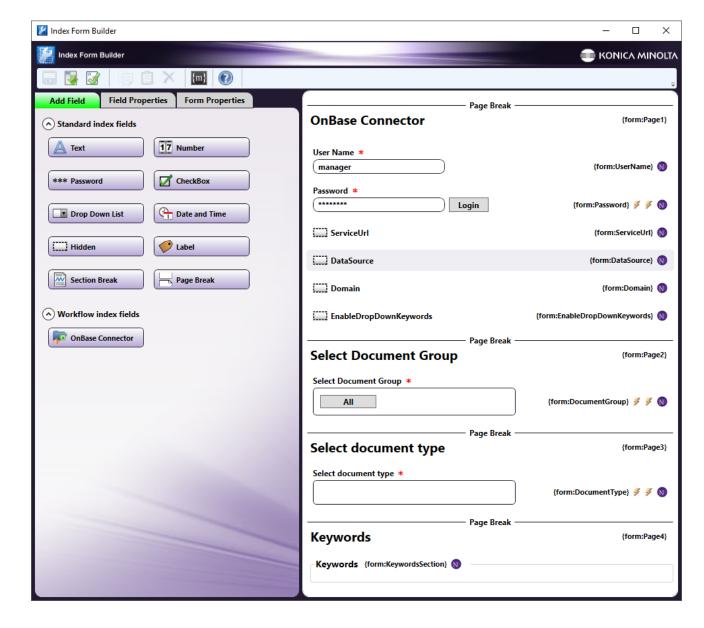


Creating an OnBase Index Form

You can create an index form that allows you to upload scanned documents to OnBase at the MFP. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and OnBase node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see an OnBase Connector button under the Workflow Index Fields area.
- 3. Drag and drop the **OnBase Connector** button to the Index Form work area. If the OnBase Connector node has already been configured, an index form with pre-populated fields will appear; otherwise, an index form with blank fields will appear, as in the following illustration:

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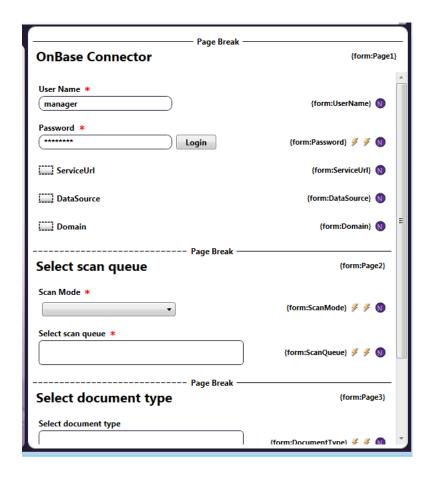
4. Assign default values to the $\textbf{Service URL},\,\textbf{Data Source},\, \text{and }\, \textbf{Domain}$ fields.

Creating an OnBase Index Form for Scan Queues

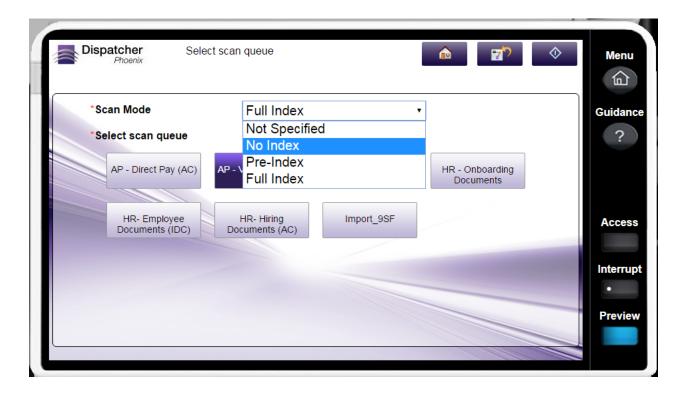
You can also create an Index Form for sending documents to OnBase Scan Queues. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and OnBase node.
- 2. Configure your OnBase node with connection details; then choose the Send to scan queue tab.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see an **OnBase Connector** button under the Workflow Index Fields area.
- 4. Drag and drop the **OnBase Connector** button to the Index Form work area. An Index Form with fields for specifying the Scan Mode, Scan Queue, Document Type, and Keywords will appear, as in the following illustration:

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5. The MFP User can then choose a Scan Mode at the control panel. If "Not Specified," "Pre-Index" or "Full Index" is selected, the User will also be able to specify a Document Type and enter keywords at the panel. See the following illustration for an example of what the MFP interface looks like:

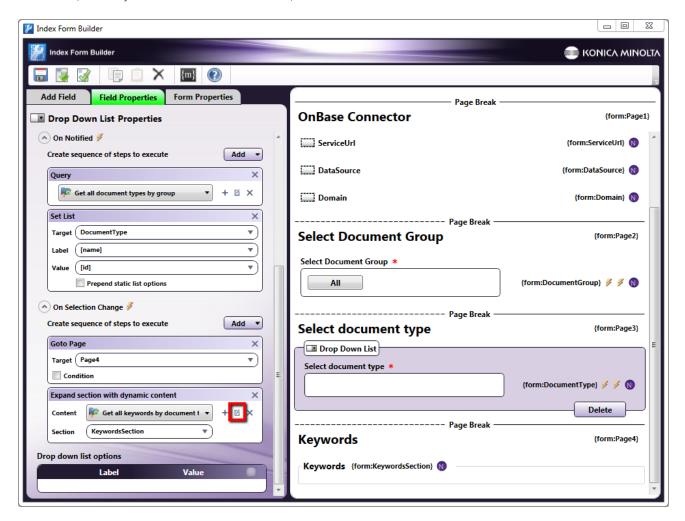


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Enabling Keyword Drop Down Lists for Workflows Created Prior to Dispatcher Phoenix 6.3.4

If you created your workflow prior to the release of Dispatcher Phoenix version 6.3.4, follow these steps to enable keyword drop down lists:

- 1. Stop the workflow.
- 2. Edit the workflow.
- 3. On the Workflow Builder toolbar, click Forms.
- 4. Click the OnBase Index Form.
- 5. In the Index Form Builder, click Select Document Type field.
- 6. On the left side of the window, under the **Field Properties** tab, scroll down to **Expand section with dynamic content** area and select the **Edit** button. (outlined by the red box in the illustration below)



7. On the OnBase Data Source Configuration window, check the box for Enable Keyword Drop Down Lists as shown in the illustration below:

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OnBase Index Form on MFP

At the MFP, the OnBase Index Form will be separated into four separate screens, as follows:

1st screen: User logs into OnBase



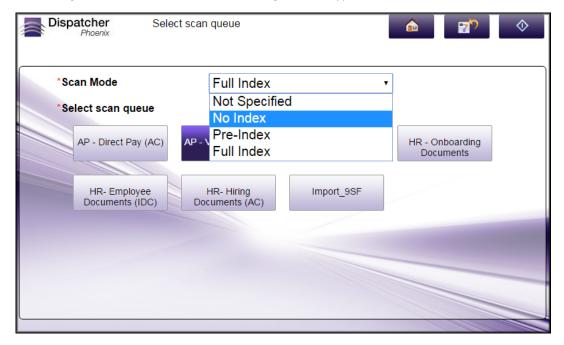
2nd screen: User selects a Document Group

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Scan Queues

If distributing files to an OnBase Scan Queue, the following screen will appear, which allows the MFP User to choose a Scan Mode and a Scan Queue.

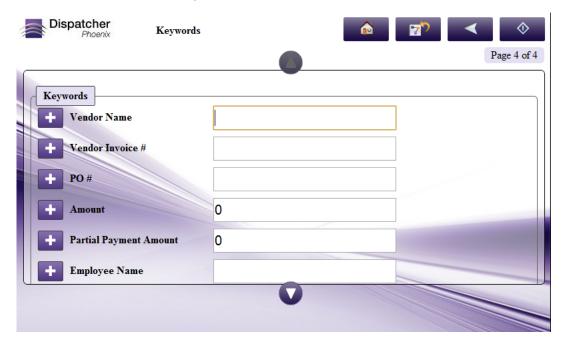


3rd screen: User selects a Document Type

Konica Minolta 1078 / 1597



4th screen: User enters keywords for the documents

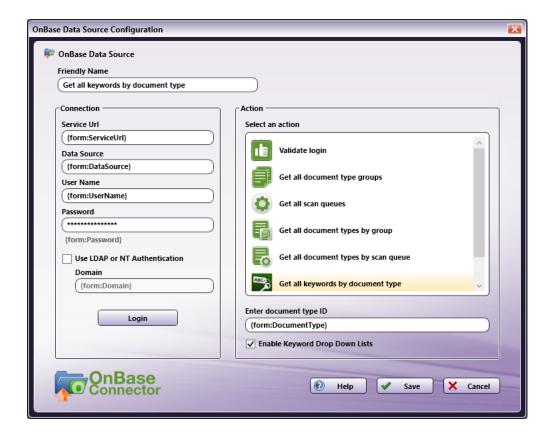


Database Browsing - OnBase Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from OnBase. Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field; then add a **Query**.
- 3. Choose ${\bf OnBase\ Data\ Source}$ from the ${\bf Query\ drop\text{-}down\ list}.$
- 4. The OnBase Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from OnBase.

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Do the following:

- In the **Friendly Name** field, enter an identifying name for the OnBase data source configuration.
- In the Connection area, provide the information necessary to connect to OnBase.
- Select the **Login** button to make sure that you are connected properly to OnBase.
- In the **Action** area, choose what kind of action to perform on the OnBase data source. Options include:
 - Validate login Use this action to validate the login credentials that are entered at the MFP (user name and password) against the OnBase data source. This action returns the following records:
 - [result] The result of the login: true or false
 - [message] Text regarding a successful or unsuccessful login.
 - Get all document type groups Use this action to display a list of the document type groups available within OnBase.
 - Get all scan queues Use this action to display a list of all scan queues available within OnBase.
 - Get all document types by groups Use this action to display a list of all document types associated with a specific document group within OnBase. You will need to enter an ID to specify which document group to use.
 - Get all document types by scan queue Use this action to display a list of document types associated with a specific scan queue within OnBase. You will need to enter an ID to specify which scan queue to use.
 - Get all keywords by document type Use this action to display a list of keywords associated with a specific document type within OnBase. You will need to enter an ID to specify which document type to use. Check the Enable Keyword Drop Down Lists box to display a drop down list for Keyword Types configured as drop down lists on the OnBase server. This box is checked by default.
 - Validate keywords Use this action to validate the keywords that are entered at the MFP against the OnBase data source.

OneDrive Connector



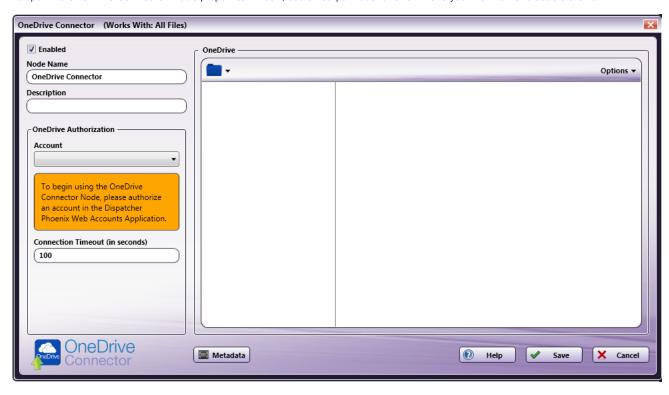
Konica Minolta 1080 / 1597

Use the **OneDrive Connector Node** to distribute documents to Microsoft OneDrive, a file hosting service that allows users to upload and sync files to cloud storage. The connector allows you to send documents to OneDrive via an automated workflow, or you can access OneDrive directly at the MFP panel.

Notes:

- To use the OneDrive Connector, you must have a OneDrive account.
- The maximum file size for uploading documents to OneDrive is 250 GB.

To open the OneDrive Connector Node properties window, add an output node for OneDrive to your workflow and double-click on it.



- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Configuring the OneDrive Connector

To configure the OneDrive Connector, you must first log into your OneDrive account via **Dispatcher Phoenix Web's Authentication Manager**. Once this initial set up is complete, logging into OneDrive within the node or at the MFP panel is no longer necessary, providing an optimized single-sign-on experience.

Note: If your organization has configured Microsoft Azure to require Admin permission for application registration at the machine, your administrator can override this restriction and allow users to register without an Admin present when creating accounts for OneDrive Connector. If you choose to configure OneDrive Connector in this way, we recommend the Admin log in first and grant consent before other users attempt to create their accounts. Otherwise, any account created for OneDrive Connector via Dispatcher Phoenix Web's Authentication Manager will require Admin credentials and the Admin will be the user registered.

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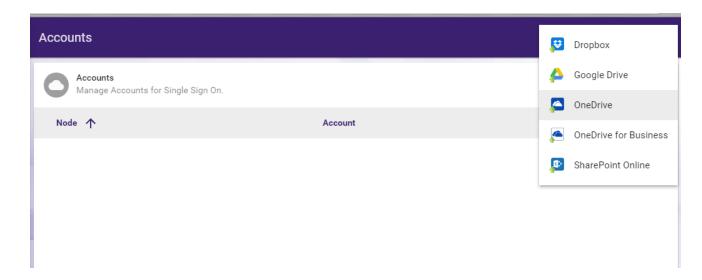
To override the Admin permission requirement when creating a OneDrive Connector account, follow the steps in the Set Up section below. In Step 4, log in using Admin credentials. If this is the first time the Admin logged in, the "Consent on behalf of your organization" checkbox will appear. Check the box at this field, then proceed to the next step in the Set Up procedure.

Important! The "Consent on behalf of your organization" option appears only the first time the Admin logs in. To regain this option, Dispatcher Phoenix must be removed from the Enterprise Applications list in Azure. The next time the Admin logs in, the option will appear.

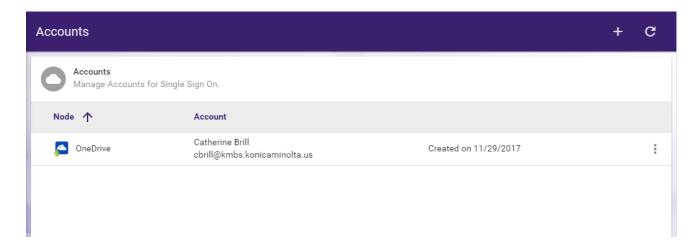
Set Up

To begin, you must first log into OneDrive via the Dispatcher Phoenix Web's Authentication Manager. Do the following:

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the **Accounts** tool on the Home page.
- 3. On the Accounts page, select the + button and choose the **OneDrive** option. See the following illustration:

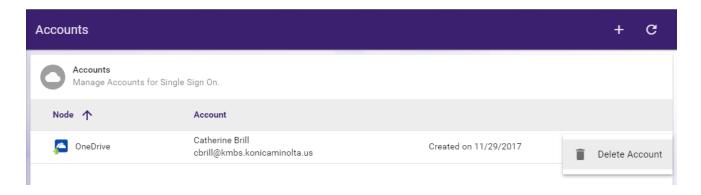


- 4. Log into OneDrive using your account credentials (email address/OneDrive account username and password).
- 5. Select **Yes** if asked for permission to let the application access your info.
- 6. The OneDrive account will now be listed on the Accounts page. See the following illustration for an example:



7. If you need to delete the account, select the vertical ellipsis button and choose **Delete Account**, as in the following illustration:

Konica Minolta 1082 / 1597

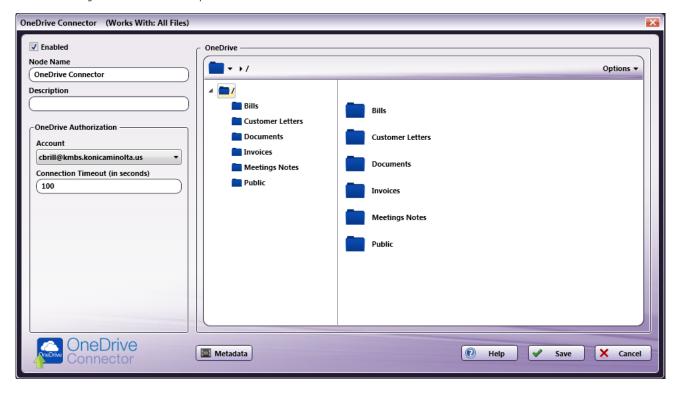


8. If you add multiple accounts, the first account you added will be marked as the Primary Account with a star icon. The benefit of a primary account is that when you sign into the MFP, you will have immediate access to this account. You can switch to a different account at the MFP by selecting the check icon, then selecting the back arrow icon on the next screen. You can also switch your primary account by selecting the vertical ellipsis button and selecting **Enable Primary Account**. You can also **Disable Primary Account** to always be prompted with the account screen at the MFP.

Customizing the OneDrive Connector Node

Once connected, the right hand side of the OneDrive node properties window displays a tree-view of your folders, sub-folders, and files in OneDrive. You can use this area to browse through your OneDrive folder structure and choose a folder to store your documents in.

See the following illustration for an example:



To choose another OneDrive account, choose the account from the **Account** drop-down list.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Sending Documents to a New Folder

To create a new folder in OneDrive to scan to, select the New folder option from the Options drop-down menu or press Ctrl + Shift + N.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view.

Konica Minolta 1083 / 1597

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use <> : " / \ | ? *

View Options

You can adjust the default view of your OneDrive folders in the node properties window by using the Options button on the top right hand side of the window. Choose the following items from the Options pull-down menu:

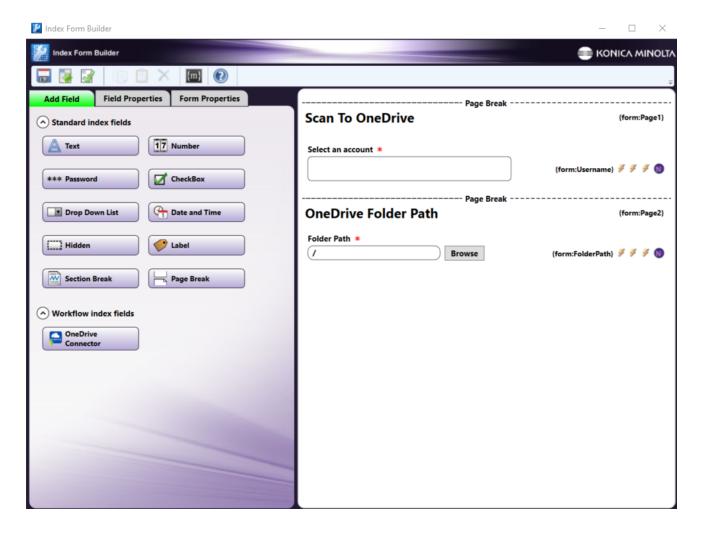
- To turn off the default view, uncheck the **Show tree view** option or press **Ctrl + T**.
- To hide the files stored in OneDrive folders, uncheck the Show files option or press Ctrl + E.
- To refresh the current view with the most up-to-date folders/files, select the Refresh option or press F5.

Creating a OneDrive Connector Index Form

You can create an index form that allows you to log into OneDrive automatically at the MFP. Do the following:

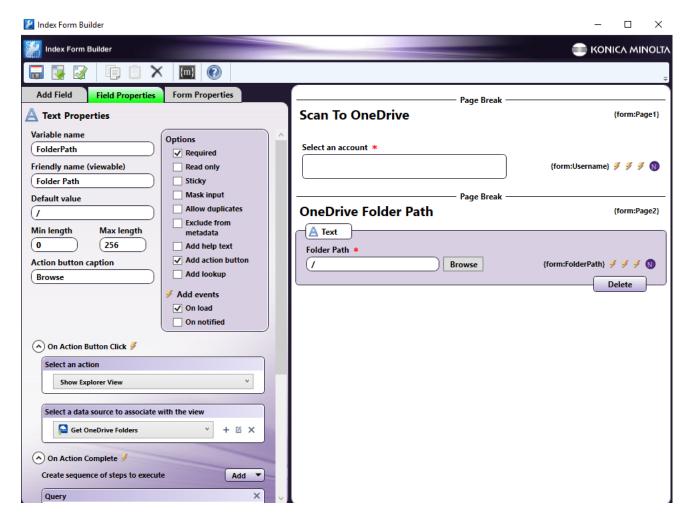
- 1. Make sure that you have logged into OneDrive from Dispatcher Phoenix Web's Account Manager.
- 2. Make sure that your workflow includes a MFP Panel node and OneDrive Connector node.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a OneDrive Connector button under the Workflow Index Fields area.
- 4. Drag and drop the **OneDrive Connector** button to the Index Form work area. A Scan to OneDrive index form will automatically appear, as in the following illustration:

Konica Minolta 1084 / 1597



Note: The OneDrive Connector defaults to displaying 200 folders during folder browsing. To update this default, Select the **Folder Path** field and then the **Edit** button next to the **Get OneDrive Folders** dropdown, as in the following illustration:

Konica Minolta 1085 / 1597



- 5. Save and close the Index Form Builder.
- 6. The OneDrive Connector node properties window will be automatically populated with the variable names of the fields on the Index Form.

 Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

Konica Minolta 1086 / 1597



OneDrive Index Form on MFP

At the MFP, the OneDrive Index Form will appear as follows:



Database Browsing - OneDrive Configuration

Konica Minolta 1087 / 1597

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from OneDrive.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose OneDrive Data Source from the Query drop-down list.
- 4. The OneDrive Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from OneDrive.



Do the following:

- In the **Friendly Name** field, enter an identifying name for the OneDrive data source configuration.
- In the Action area, you can choose what kind of action to perform on the OneDrive data source. Options include:
 - Get Primary OneDrive Account This option returns the primary OneDrive account for the user.
 - Get OneDrive Accounts This option returns all the OneDrive accounts for the user.
 - **Get OneDrive Folders** Use this action to display a list of folders within a specific OneDrive Folder Path. When you select the Get OneDrive Folders item, new fields will appear for configuration, as in the following illustration:

Konica Minolta 1088 / 1597



- Folder Path Enter the folder ID of the OneDrive root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new OneDrive folder at the MFP.
 - Show files Check this option to display files in OneDrive folders at the MFP.

OneDrive for Business Connector



Use the OneDrive for Business Connector node to distribute documents to OneDrive for Business, Microsoft's cloud storage service that allows organizations to provide each team member with a storage place. The connector allows you to send documents to OneDrive for Business via an automated workflow, or you can access OneDrive for Business directly at the MFP panel.

Notes:

- To use the OneDrive for Business Connector, you must have a OneDrive account.
- The maximum file size for uploading documents to OneDrive for Business is 250 GB.

To open the OneDrive for Business Connector node's properties window, add an output node for OneDrive for Business to your workflow and double-click on it.

Konica Minolta 1089 / 1597



- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Metadata To access the Metadata Browser window, click this button.
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Configuring the OneDrive for Business Connector

To configure the OneDrive for Business Connector, you must first log into your OneDrive for Business account via **Dispatcher Phoenix Web's Authentication Manager**. Once you complete this initial set up, logging into OneDrive for Business within the node or at the MFP panel is no longer necessary, providing an optimized single-sign-on experience.

Note: If your organization has configured Microsoft Azure to require Admin permission for application registration at the machine, your administrator can override this restriction and allow users to register without an Admin present when creating accounts for OneDrive for Business Connector. If you choose to configure OneDrive for Business Connector in this way, we recommend the Admin log in first and grant consent before other users attempt to create their accounts. Otherwise, any account created for OneDrive for Business Connector via Dispatcher Phoenix Web's Authentication Manager will require Admin credentials and the Admin will be the user registered.

To override the Admin permission requirement when creating a OneDrive for Business Connector account, follow the steps in the Set Up section below. In Step 4, log in using Admin credentials. If this is the first time the Admin logged in, the "Consent on behalf of your organization" checkbox will appear. Check the box at this field, then proceed to the next step in the Set Up procedure.

Important! The "Consent on behalf of your organization" option appears only the first time the Admin logs in. To regain this option, Dispatcher Phoenix must be removed from the Enterprise Applications list in Azure. The next time the Admin logs in, the option will appear.

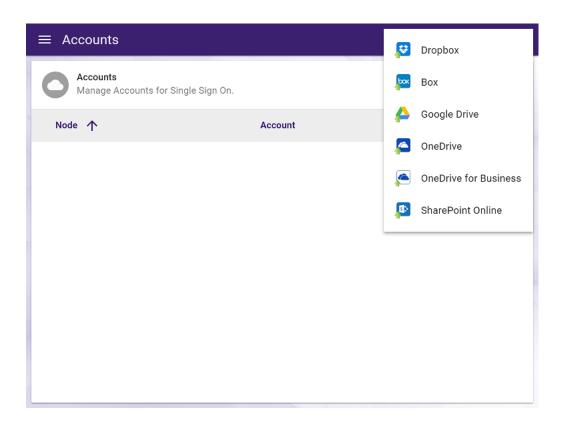
Set Up

To begin, you must first log into OneDrive for Business via the Dispatcher Phoenix Web's Authentication Manager. Do the following:

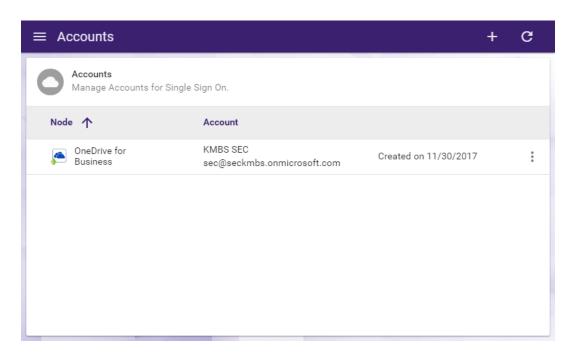
1. Log into Dispatcher Phoenix Web.

Konica Minolta 1090 / 1597

- 2. Select the **Accounts** tool on the Home page.
- 3. On the Accounts page, select the + button and choose the OneDrive for Business option. See the following illustration:

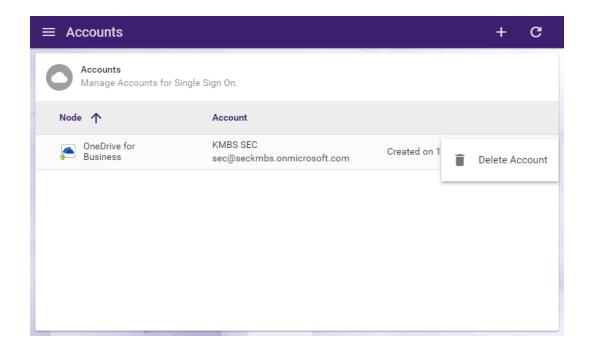


- 4. Log into OneDrive for Business using your account credentials (email address/OneDrive for Business account username and password).
- 5. Select \boldsymbol{Yes} if asked for permission to let the application access your info.
- 6. The OneDrive for Business account will now be listed on the Accounts page. See the following illustration for an example:



7. If you need to delete the account, select the vertical ellipsis button and choose **Delete Account**, as in the following illustration:

Konica Minolta 1091 / 1597

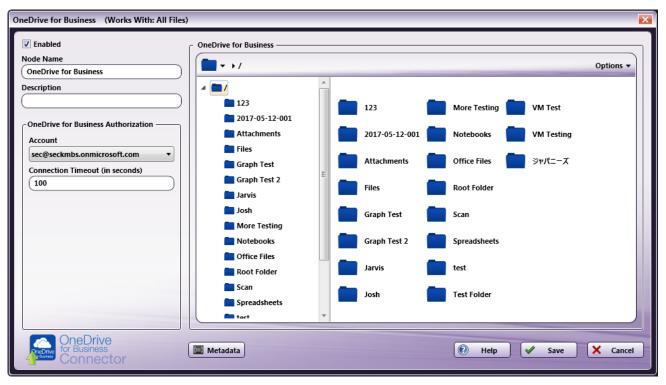


8. If you add multiple accounts, the first account you added will be marked as the Primary Account with a star icon. The benefit of a primary account is that when you sign into the MFP, you will have immediate access to this account. You can switch to a different account at the MFP by selecting the check icon, then selecting the back arrow icon on the next screen. You can also switch your primary account by selecting the vertical ellipsis button and selecting **Enable Primary Account**. You can also **Disable Primary Account** to always be prompted with the account screen at the MFP.

Customizing the OneDrive for Business Connector Node

Once connected, the right hand side of the OneDrive for Business node properties window displays a tree-view of your folders, sub-folders, and files in OneDrive for Business. You can use this area to browse through your OneDrive for Business folder structure and choose a folder to store your documents in.

See the following illustration for an example:



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To choose another OneDrive for Business account, choose the account from the **Account** drop-down list.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Sending Documents to a New Folder

To create a new folder in OneDrive for Business to scan to, select the **New folder** option from the **Options** drop-down menu or press **Ctrl** + **Shift** + **N**.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *

View Options

You can adjust the default view of your OneDrive for Business folders in the node properties window by using the Options button on the top right hand side of the window. Choose the following items from the Options pull-down menu:

- To turn off the default view, uncheck the **Show tree view** option or press **Ctrl + T**.
- To hide the files stored in OneDrive for Business folders, uncheck the Show files option or press Ctrl + E.
- To search for a specific folder, select **Search** or press **Ctrl + S**. Searches are always performed from the root folder. Search results are limited to the first 200 results (this can be adjusted up to 2000 folders when using an Index Form). If the search returns a large number of folders, it is recommended that the user enter more specific search criteria to narrow down the search results.

Notes:

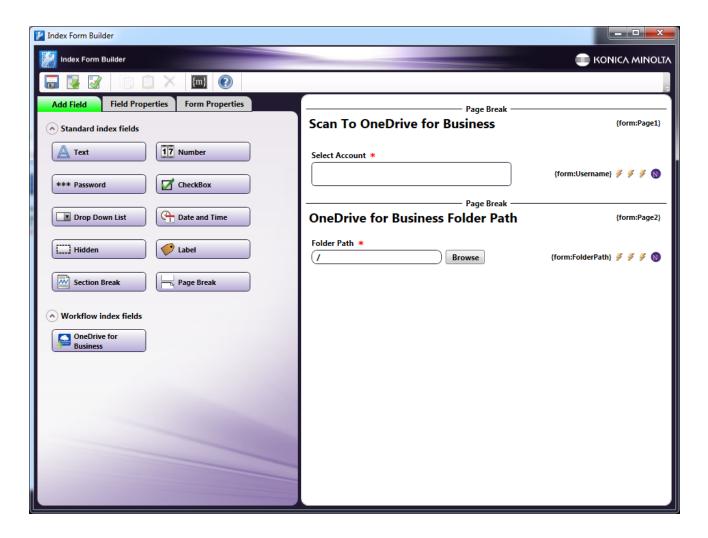
- Symbols are not supported in the search string.
- $\circ~$ Folder paths are limited to 400 characters.
- To refresh the current view with the most up-to-date folders/files, select the **Refresh** option or press **F5**.

Creating a OneDrive for Business Connector Index Form

You can create an index form that allows you to log into OneDrive for Business automatically at the MFP. Do the following:

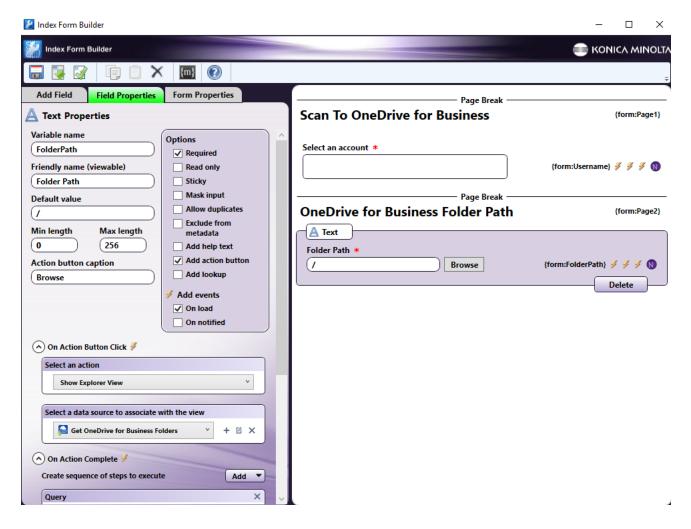
- 2. Make sure that you have logged into OneDrive for Business from Dispatcher Phoenix Web's Account Manager.
- 3. Make sure that your workflow includes a MFP Panel node and OneDrive for Business Connector node.
- 4. Open up the Index Form Builder from the MFP Panel node. You should see a OneDrive for Business Connector button under the Workflow Index Fields area.
- 5. Drag and drop the **OneDrive for Business Connector** button to the Index Form work area. A Scan to OneDrive for Business index form will automatically appear, as in the following illustration:

Konica Minolta 1093 / 1597



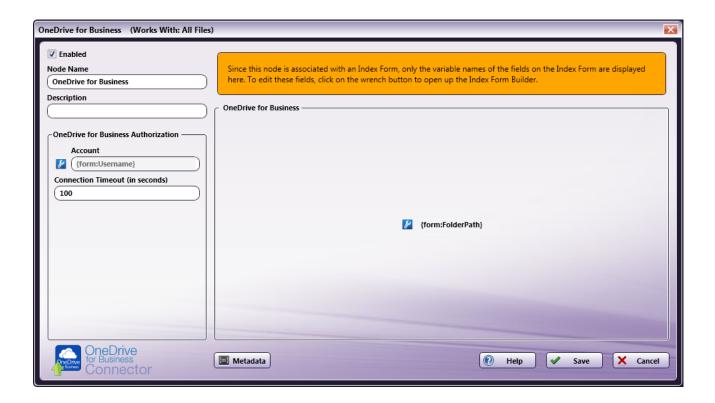
Note: The OneDrive for Business Connector defaults to displaying 200 folders during folder browsing. To update this default, Select the **Folder Path** field and then the **Edit** button next to the **Get OneDrive Folders** dropdown, as in the following illustration:

Konica Minolta 1094 / 1597



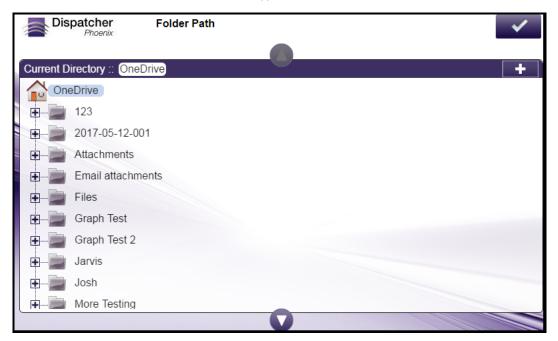
- 6. Save and close the Index Form Builder.
- 7. The OneDrive for Business Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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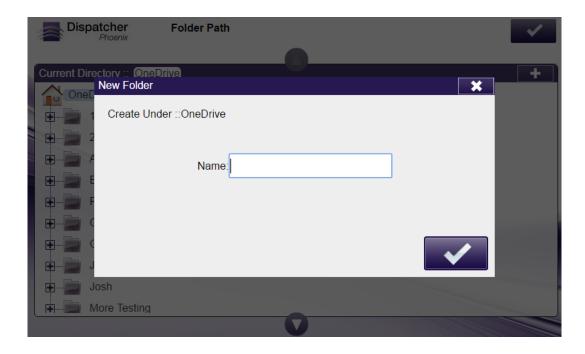
OneDrive for Business Index Form on MFP

At the MFP, the OneDrive for Business Index Form will appear as follows:



You can add a new folder by selecting the + icon at the top of the screen. The **New Folder** window will appear, as shown in the following illustration:

Konica Minolta 1096 / 1597

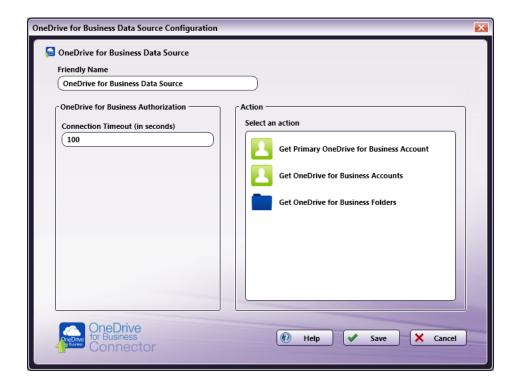


Database Browsing - OneDrive for Business Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from OneDrive for Business.

Using the Index Form Builder, do the following:

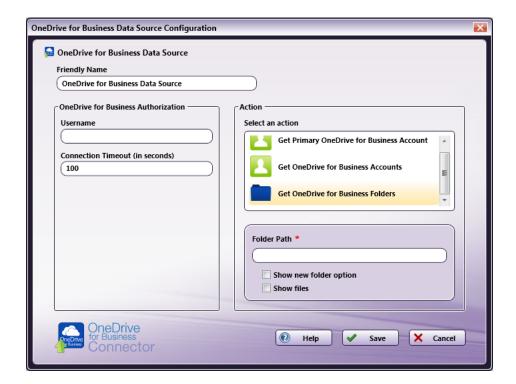
- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose OneDrive for Business Data Source from the Query drop-down list.
- 4. The OneDrive for Business Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from OneDrive for Business.



Do the following:

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- In the **Friendly Name** field, enter an identifying name for the OneDrive for Business data source configuration.
- In the **Action** area, you can choose what kind of action to perform on the OneDrive for Business data source. Options include:
 - Get Primary OneDrive for Business Account This option returns the primary OneDrive for Business account for the user.
 - Get OneDrive for Business Accounts This option returns all the OneDrive for Business accounts for the user.
 - Get OneDrive for Business Folders Use this action to display a list of folders within a specific OneDrive Folder Path. When you select the Get OneDrive for Business Folders item, new fields will appear for configuration, as in the following illustration:



- Folder Path Enter the folder ID of the OneDrive for Business root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new OneDrive for Business folder at the MFP.
 - Show files Check this option to display files in OneDrive for Business folders at the MFP.

Paragon Cloud Fax

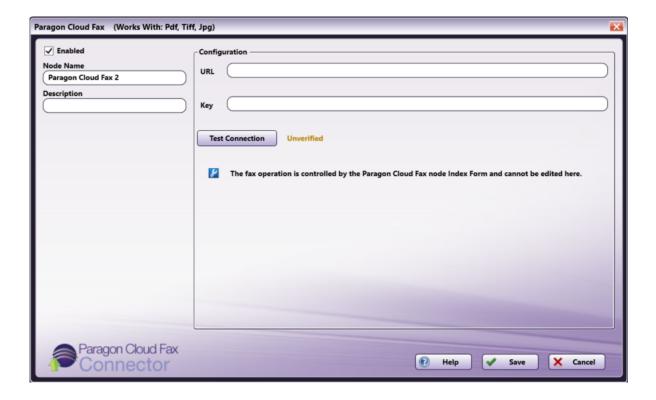


The **Paragon Cloud Fax** node allows users to send documents from a Dispatcher Phoenix workflow directly to through the Dispatcher Paragon cloud-based online fax service.

Important! The Paragon Cloud Fax node must be installed separately. Use Add-In Manager and follow these installation instructions. In addition, the Paragon Cloud Fax node works ONLY when combined with the MFP Panel or Web Capture nodes and the fax connection capabilities of Dispatcher Paragon. For more information about Dispatcher Paragon's Cloud Fax feature, including configuration and administration, click here.

Configuring the Paragon Cloud Fax Node

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- **Enabled** To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions. By default, nodes are enabled upon creation.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

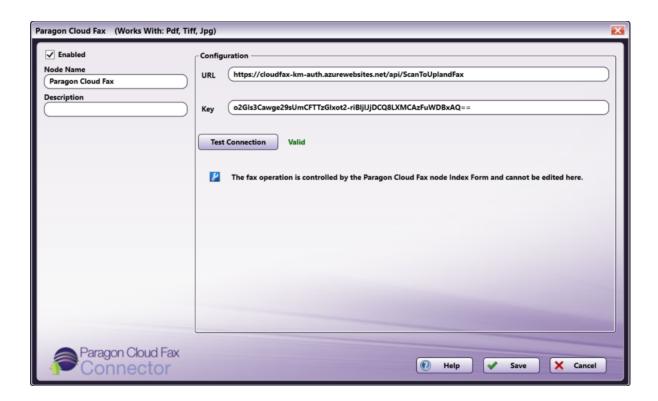
- **Help** To access Dispatcher Phoenix Online Help, click this button.
- ${\bf Cancel}$ To exit the window without saving any changes, click this button.
- **Save** To preserve your node definition and exit the window, click this button.

Connecting to Paragon Cloud Fax

To begin, you must first connect to the Paragon Cloud Fax Server. In the Configuration area, do the following:

- 1. In the $\boldsymbol{\mathsf{URL}}$ field, enter the URL address of your Paragon Cloud Fax server.
- 2. In the **Key** field, enter the Key provided with your Paragon Cloud Fax server for authentication.
- 3. When you are done, select the **Test Connection** button to connect to your Paragon CloudFax Server.

Konica Minolta 1099 / 1597

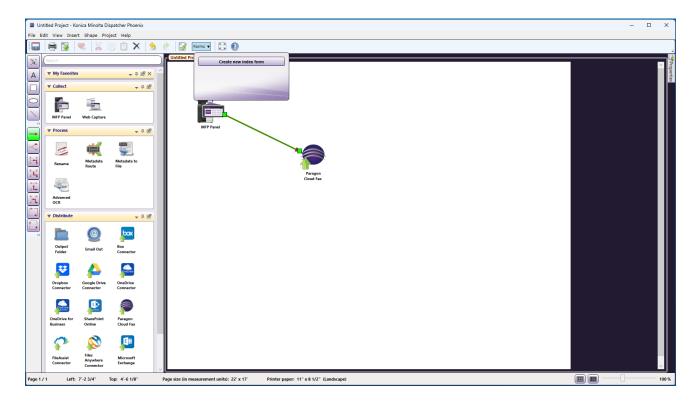


Note: The node does not have any settings the user needs to configure and is intended to be used with an attached Index Form.

Configuring the Paragon Cloud Fax Index Form

You can create an index form that allows you to connect to Dispatcher Paragon Cloud Fax automatically at the MFP. Do the following:

- 1. Make sure that your workflow includes a **MFP Panel node** and **Paragon Cloud Fax** node.
- 2. Click on the Forms dropdown in the toolbar and select Create New Index Form, as in the following illustration:



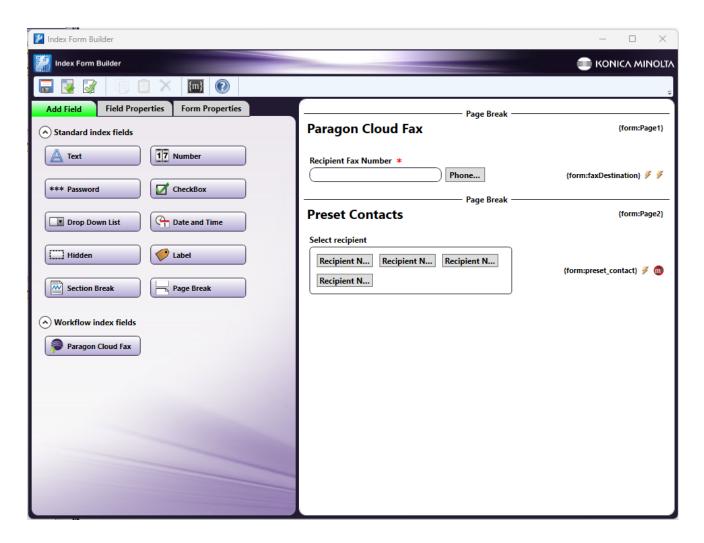
Konica Minolta 1100 / 1597

3. Select **Blank Index Form**, as in the following illustration:



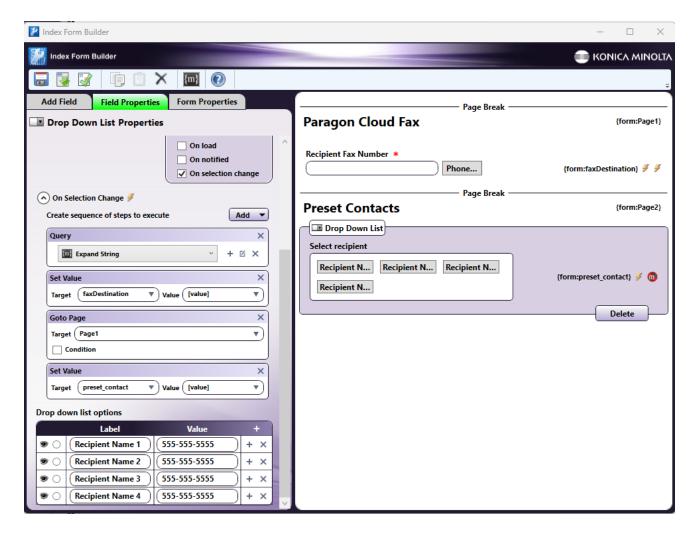
4. Then, drag and drop the **Paragon Cloud Fax** button to the Index Form work area. A Paragon Cloud Fax index form will automatically appear, as in the following illustration:

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5. To update the contacts in the Phone Book, click the **Drop Down List** area and edit the **Label** and **Value** fields that appear on the left, as in the following illustration:

Konica Minolta 1102 / 1597



6. Save and close the Index Form Builder.

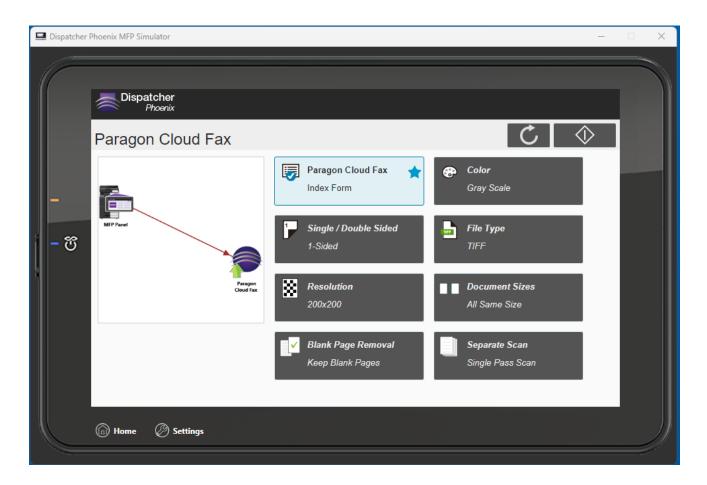
For more information, see the Index Form Builder page.

Paragon Cloud Fax at the MFP

At the MFP, take the following steps:

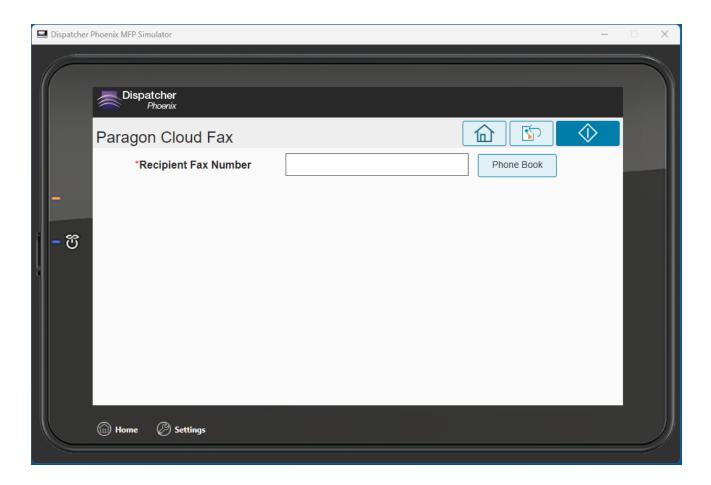
- 1. **Select your workflow** If only one Dispatcher Phoenix workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
- 2. Select the index form When your workflow appears on the screen, select the index form.

Konica Minolta 1103 / 1597



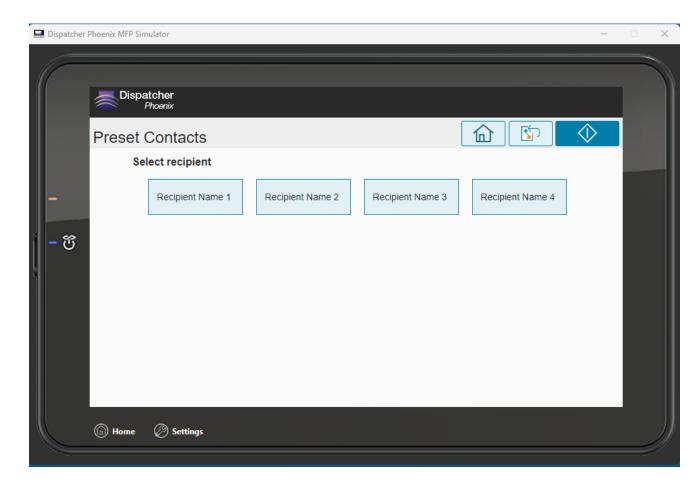
3. Enter the recipient's fax number - This can be accomplished manually or by tapping the Phone Book button.

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Tapping the **Phone Book** button brings you to the pre-configured phone book, as in the following illustration:

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4. Scan your document - Your document will be automatically sent to the selected fax number.

RightFax Connector



The **RightFax Connector** node is designed to allow new and existing Dispatcher Phoenix workflows to distribute files via RightFax's digital fax system. Using the RightFax Connector, you can do the following:

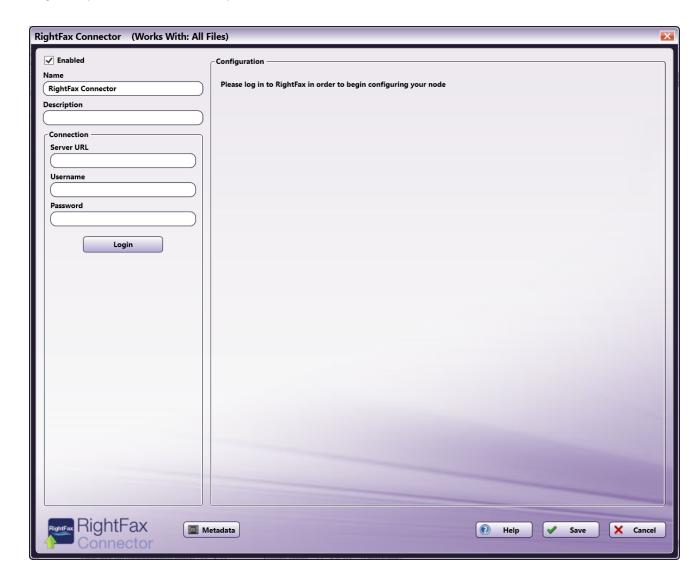
- Connect to a RightFax server.
- Enter specific recipients during node configuration for an automated workflow.
- Use workflow metadata to specify fax recipients.
- Enter specific recipients using an **Index Form** directly at the MFP during scan time.
- Attach a preconfigured cover page.
- Add a note along with the fax.
- Select a Billing Code.
- · Choose a Date and Time to send a fax, either through the node configuration or at scan time via an Index Form.
- Send faxes as other users.

Node Properties

To use the RightFax Connector, you must first create it. Do the following:

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1. Drag and drop the connector node from the panel on the left into the Workflow Builder area; then double-click on it.



- 2. Make sure the **Enabled** box is checked. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be distributed and may be lost.
- 3. In the **Node Name** field, enter a meaningful name for the RightFax Connector.
- 4. In the **Description** field, enter a description for the RightFax Connector. Although this is not required, it can be helpful to distinguish between multiple distribution points. If the description is long, you can hover the mouse over the field to read its entire contents.

There are several other buttons within the RightFax Connector:

- Metadata Opens the Metadata Browser window.
- Help Opens Dispatcher Phoenix Online Help.
- Save Preserves the current state of the node.
- Cancel Exits the window without saving any changes.

Connecting to the RightFax Server

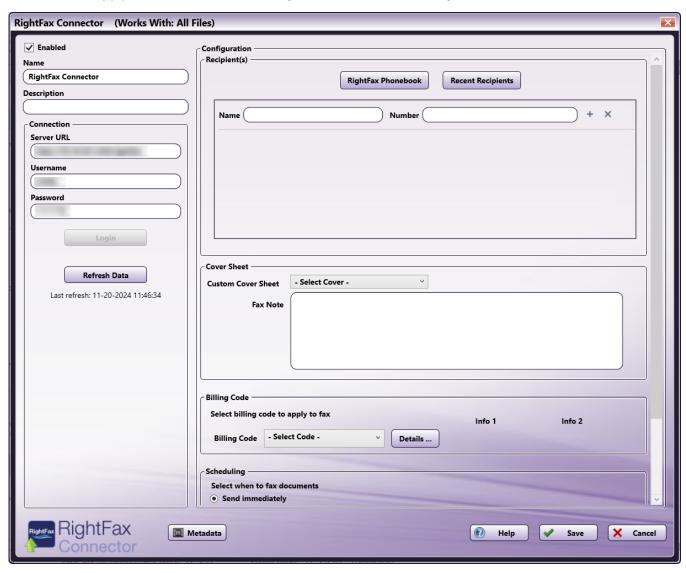
To connect to the RightFax Connector, do the following:

- $1. \ \ \hbox{In the \textbf{Connection}} \ \ \hbox{area, enter the URL of the RightFax server in the \textbf{ServerURL field}}.$
- 2. In the Username and Password fields, enter the username and password that is used to connect to the RightFax server.
- 3. Select the **Login** button to verify the system is properly configured to distribute documents via RightFax.

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This will automatically populate the rest of the fields for the RightFax Connector, as in the following illustration:



After login, a button will appear called **Refresh Data**. Clicking this button will reload the data for Cover Sheets, Billing Codes, and Users (for the Send as Other User feature).

Configuring the RightFax Connector

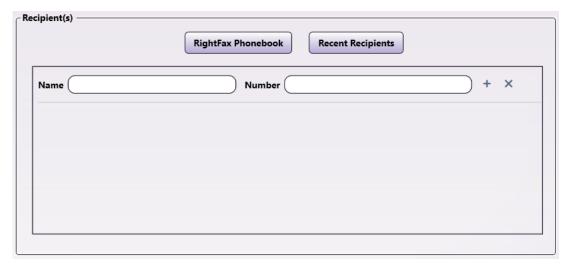
The **Configuration** section includes fields that allow you to specify the Recipient Name, Recipient Number, Fax Settings, and more. These fields can also be accessed and filled out at the MFP during scan time.

Note: The Configuration section of the RightFax Connector node will not populate until you've successfully logged into the RightFax server.

Recipient(s)

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The Recipient(s) area allows you to configure the Name and Number of the person or people you would like to recieve the faxes you send.



- Recipient Name: Enter the name of the recipient the fax is for.
- Recipient Number: Enter the recipient number where the fax should be sent. You may search for a recipient number through the connected RightFax Phonebook or through the Recent Recipients list.
 - **RightFax Phonebook** Clicking on this button will open a window that displays the first fifty (50) contacts in your RightFax phonebook. Contacts are listed alphanumerically by contact Name. You can also search for individual contacts by typing in the search bar at the top of the window, which will search the entire RightFax phonebook and display the first fifty (50) results.



Notes:

- When using the Phonebook search function, RightFax will search the entire phonebook entry for the entered string, which can return results where that string is not present in the Name or Number that display, but is present in other fields for that entry.
- If "Must Select Recipients from Phonebook" is enabled within the RightFax server configuration, the **Recent Recipients** node button will not appear. At the MFP, clicking **Recent Recipients** will produce an error message. You must select a recipient from the

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Phonebook. The selection cannot be edited, though you can select a different recipient from the phone book if necessary.

- The RightFax Connector automatically filters out any Phonebook contacts that do not have a Recipient Name or a Recipient Number to ensure faxes are correctly uploaded to the RightFax server.
- When using the Search function within the Phonebook at the MFP, searching for and selecting a new recipient will delete any previously searched-for and selected recipients.
- Recent Recipients Clicking on this button will open a window with the fax numbers of the last ten (10) unique numbers who received faxes from this account.



To add multiple recipients, click the + button next to one of the recipient rows.

To delete a recipient, click the **X** button next to the recipient you would like to remove.

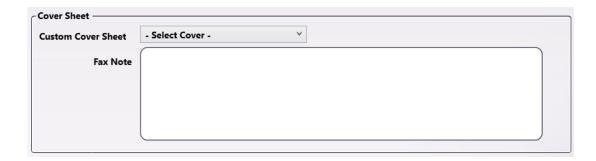
Notes:

- The RightFax Connector requires, at minimum, both a Recipient Name and a Recipient Number to send faxes through RightFax.
- The Recipient Name and Recipient Number fields accept Metadata. Click on the **Metadata** button to open the **Metadata Browser** window. You can then drag-and-drop metadata variables from the **Metadata Browser** into the appropriate open text fields.
- The Recipient Number field accepts either metadata or a string of numbers. Recipient Numbers with symbols, letters, etc. are not accepted.
- If a configuration field contains the curly bracket character ({) that is not a metadata key, then the administrator must add an additional curly bracket next to it to prevent the node from attempting to read the entry as metadata. For example, a contact named "Cynthia {ABC Corp}" would need to be entered as "Cynthia {{ABC Corp}}".
- Recipient Name has a maximum length of 60 characters. Recipient Number has a maximum length of 256 characters.

Cover Sheet

The RightFax Connector supports the addition of a cover sheet on all outgoing faxes.

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To add a cover sheet, do the following:

1. Select your Custom Cover Sheet from the drop-down list of available options.

Note: The drop-down list displays cover sheets that have already been added to the RightFax server.

2. Enter any additional text in the **Fax Note** field.

Note: This field accepts metadata.

Billing Code

The RightFax Connector fully supports RightFax billing codes.



To select a Billing Code, do the following:

- 1. Select your Billing Code. This can be accomplished in two ways:
 - Select the Billing Code from the drop-down menu

OR

• Select the **Details** button. Then, select the Billing Code from the available options with the **Select** button.

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After selecting your Billing Code, the Billing Code Information 1 and Billing Code Information 2 for that Billing Code will appear in the areas labeled Info 1 and Info 2, respectively.

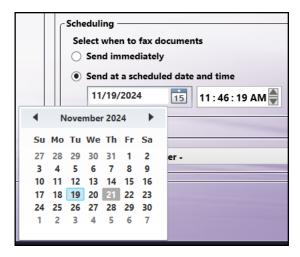


Scheduling

The RightFax Connector supports scheduling faxes at future dates. To schedule a fax, do the following:

- 1. **Select when to fax documents** Select the radio button for:
 - Send Immediately The fax will be sent as soon as the file is successfully uploaded to the RightFax server.
 - Send at a scheduled date and time Select a specific date and time when the fax should be sent to the recipient.

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Note: If the node is configured to send documents at a date and time that is in the past, the node will process those faxes immediately.

Send as Other User

RightFax admins have the ability to send faxes as though they were another user. Select from the available drop-down list the user you would like faxes to be sent as. By default, the Current User is the sender.



If you select the **Metadata** option from the drop-down menu, a field will appear that you can drag and drop metadata into from the **Metadata Browser**.



When you are finished configuring the node, select the Save button to keep the RightFax Connector node configuration.

Using the RightFax Connector with an Index Form

To set up the RightFax Connector with an attached Index Form, do the following:

- 1. Make sure that your workflow includes a RightFax Connector node.
- 2. Click on the Forms dropdown in the toolbar and select Create New Index Form to open the Index Form Builder, as in the following illustration:

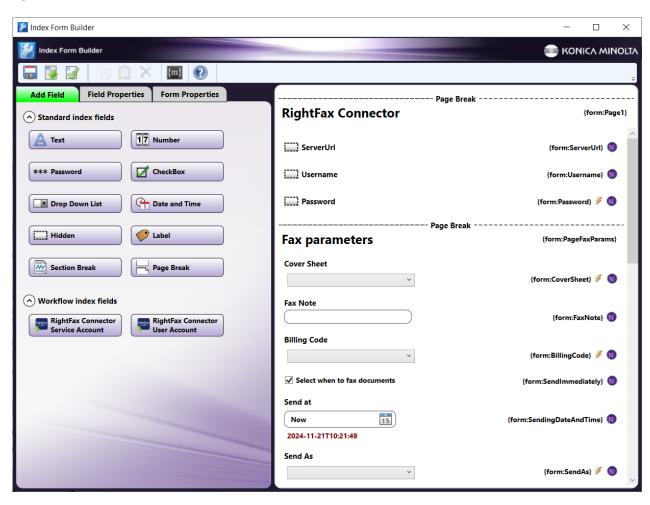
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3. Select the **Blank Index Form** option in the pop-up. Then, drag either the **RightFax Connector Service Account** button or the **RightFax Connector User Account** button to the Index Form Builder working area. Several fields will populate, as in the following illustration:

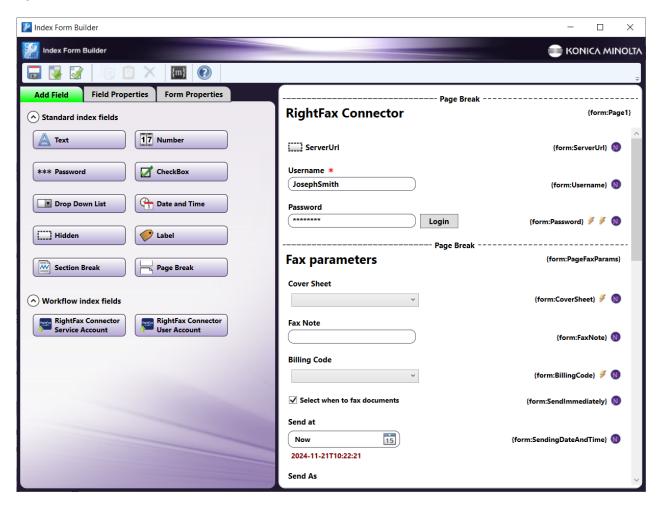
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• RightFax Connector Service Account



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· RightFax Connector User Account



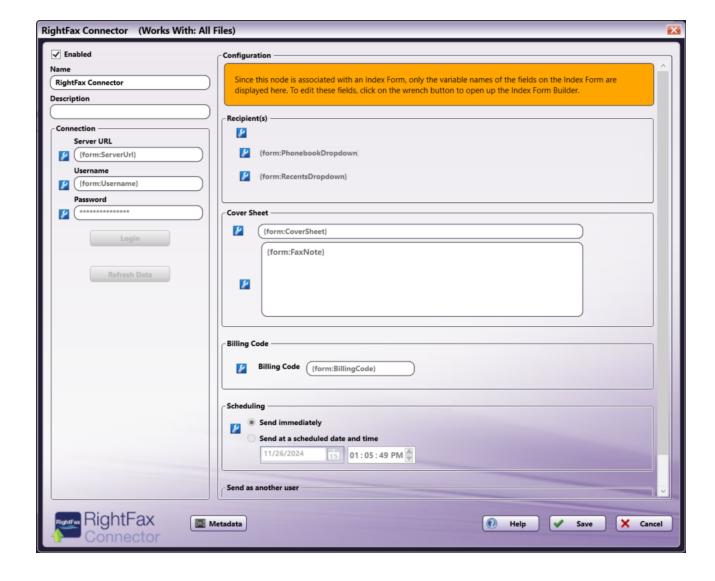
Notes:

- The RightFax Connector Service Account is designed for multiple users to login with the same credentials. The RightFax Connector User Account is designed for multiple users to login with their own credentials.
- Fields with the dotted outline, such as ServerUrl in the illustration, are hidden fields set up by the RightFax administrator. They will not appear on the MFP.
- 4. Select the ServerURL component and enter the server URL for the RightFax server in the Default value field.

Note: If the RightFax connector is already configured with a ServerURL, Username, and/or Password, those will automatically populate here as defaults.

- 5. If the index form is being configured with the Service Index Form, the user will need to enter the Username and Password credentials.
- 6. Make any additional selections or enter additional information, such as configuring a default fax note or scheduling faxes. Many options will only be configurable by the user at the MFP.
- 7. Validate, Save, and close the Index Form Builder.
- 8. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.
- 9. The **RightFax Connector** node properties window will automatically populate with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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Using the RightFax Connector Index Form with Multiple Inputs

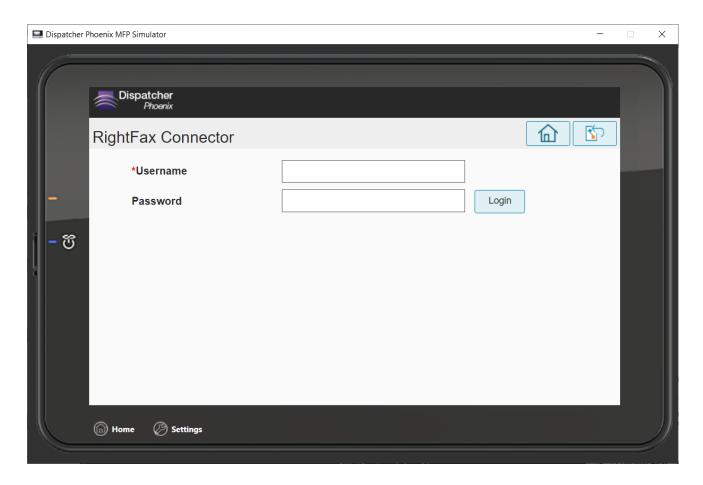
Once you associate your RightFax Connector node with a MFP Panel or Web Capture node's index form, all the information necessary to connect and route to Fax is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed RightFax Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new RightFax Connector node that is not connected to an Index Form.

RightFax Connector Index Form on MFP

At the MFP, you will be able to use a workflow with a RightFax Connector configured with an Index Form like so:

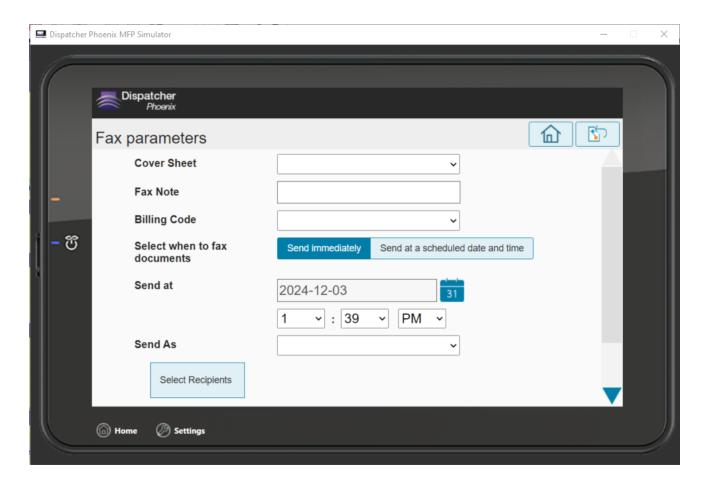
- 1. At the MFP, open the workflow containing the RightFax Connector and the node associated with the Index Form that you have already configured.
- 2. If the Index Form was built using a properly preconfigured Service Account form, you will be automatically logged in. If the Index Form was built using a User Account form, you will need to provide the Username and Password, if they have not been preconfigured. Then, select **Login**.

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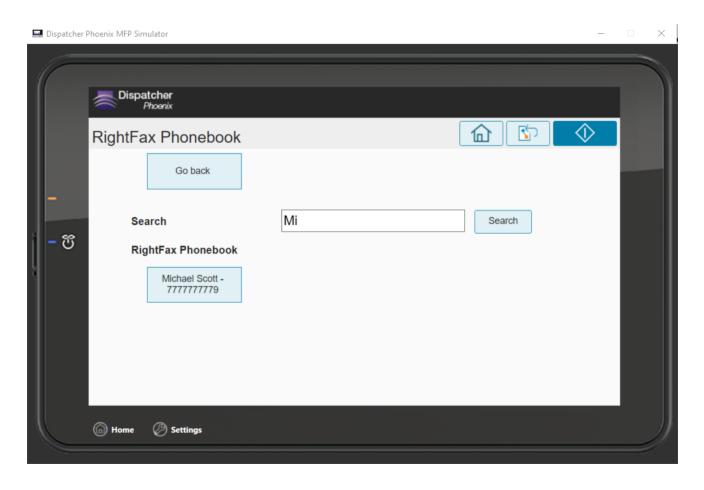
- 3. Use the drop-down menus and fields to:
 - Select a preconfigured Cover Sheet
 - Add a fax note
 - Select a preconfigured Billing Code
 - Select when to fax documents
 - Select another user to send faxes as (Admin only)

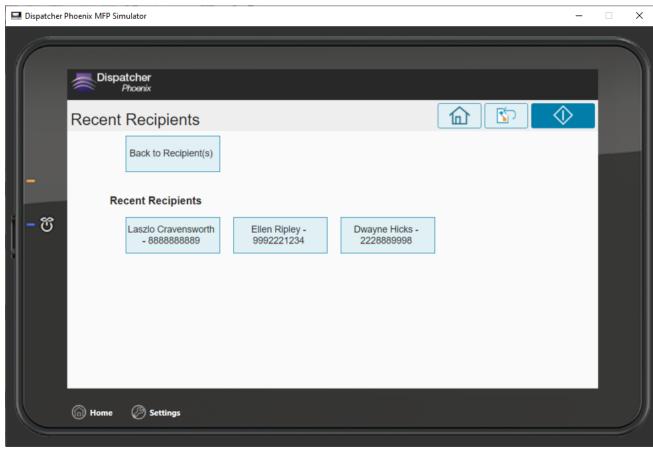
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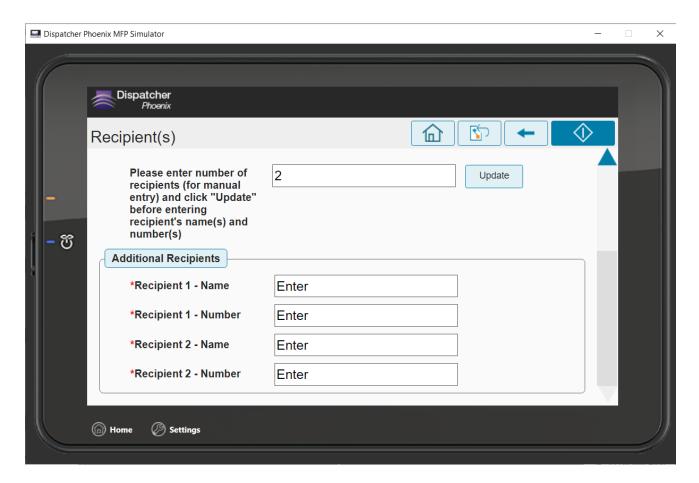
- 4. Select the **Select Recipients** to continue
- 5. Use the Phonebook or the Recent Recipients list to select fax recipients. If needed, you can enter a number of additional recipients, select the **Update** button, and enter the name and number for those recipients manually.

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6. Scan the document.

SharePoint Connector



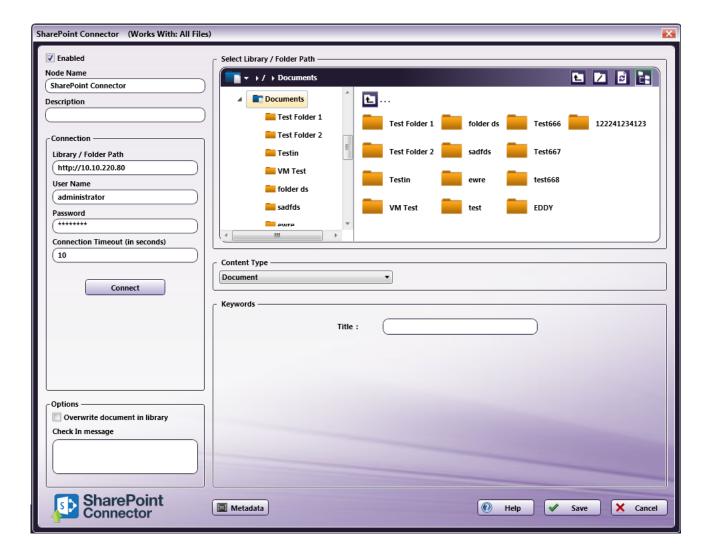
The SharePoint Connector allows you to connect to a SharePoint site to store documents within the specified SharePoint repository.

Important! The SharePoint Connector supports Microsoft SharePoint 2016, 2013, 2010, 2007, and SharePoint Online, with Windows SharePoint Services v3. In addition, the SharePoint Connector supports the following authentication schemes:

- Basic authentication over both HTTP or HTTPS
- NTLM
- Negotiate

To open the SharePoint node's properties window, add an output node for **SharePoint** to your workflow and double-click on it.

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- Check the **Enabled** box so that the process will be run. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the SharePoint node.
- In the **Description** field, enter a description for the SharePoint node. Although this is not required, it can be helpful to distinguish multiple processes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.
- Click on the Metadata button to open up the Metadata Browser window and add metadata variables to the fields in this window.

Configuring the SharePoint Server

To begin, you must first connect to a SharePoint library. In the Connection area, do the following:

- 1. In the ${\bf Library/Folder\ Path}$ field, enter the URL of the SharePoint site
- 2. In the User Name and Password fields, enter the user name and password that is used to connect to the specific SharePoint server.
- 3. Change the seconds allotted for the time without communication (after the initial connection to the server) before a timeout occurs using the **Connection Timeout** field, if necessary. When loading large documents, the connection timeout value should increase (e.g., to upload a 25-page document, a timeout value of 100 seconds would be suitable).
- 4. When done, select the Connect button to connect to SharePoint.

See the following illustration for an example:

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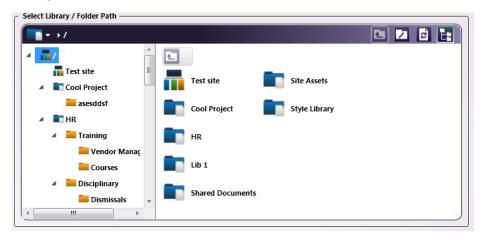


Navigating through SharePoint Sites/Libraries/Folders

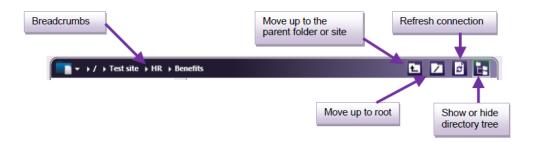
Once connected, the right hand side of the SharePoint node properties window displays the SharePoint site that you have specified. Underneath the site, you will see a visual representation of the libraries within the site and the folders/subfolders within each library.

In order to share files, SharePoint uses libraries. A library is a location on a SharePoint site where files can be collected, created, updated, and managed. Each library displays a list of files and key information about the files, also known as keywords.

In order to set up the SharePoint node correctly, you must specify which library and/or folder the documents should be distributed to. See the following illustration:



Navigation is similar to Windows Explorer where you can click on a site to see the libraries within it, click on a library to view the folders within it, and click on a folder to view the subfolders within it. Other navigation tools are provided on the top of the section, as in the following illustration:



Specifying Content Type

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In the Content Type area, you can use the drop-down list to choose a pre-defined default content type for files uploaded to this library. Choosing a different content type will change the fields in the Keywords area below.

Note: If your workflow was created prior to the release of Dispatcher Phoenix version 6.3.4, you will need to create a new workflow in order to access the SharePoint content types functionality. Simply updating Dispatcher Phoenix and replacing the SharePoint Connector node will not work.

Specifying Keywords

In the Keywords area, a list of blank Keyword entry fields will appear for you to tag the documents for organization purposes within the repository. Each library has its own collection of keywords. Enter appropriate text into these fields to suit your purposes. For example, if the library has a "Title" keyword, you can enter a title to tag the document with an appropriate title.

You can click on the **Metadata** button to open up the Metadata Browser window and drag-and-drop metadata variables into the Keyword fields, if desired.

Note: Date keywords require a date format of YYYY-MM-DD. For example, 2013-03-01 is March 1, 2013.

Specifying Other Options

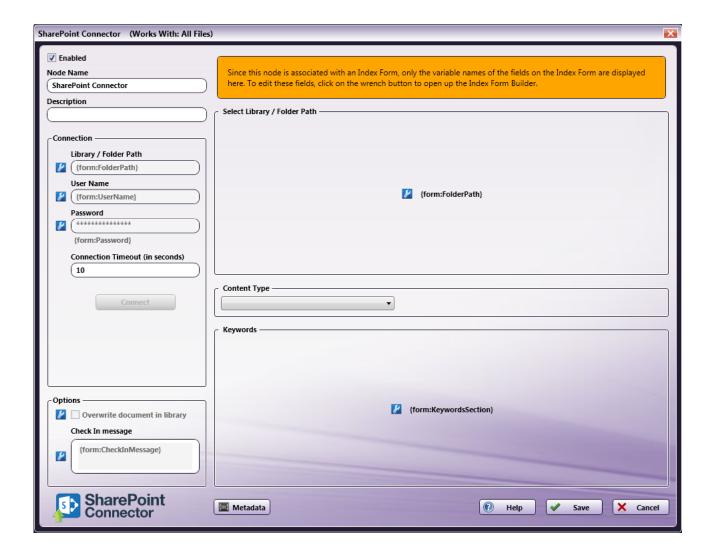
In the Options area, you can do the following:

- Check the Overwrite document in library box to replace the existing document in the library.
- In the **Check in message** area, you can enter a comment that will be included with the document when it is checked into the repository. This field is optional. In order for this message to be sent, the SharePoint server must be configured to support check-in messages (configured per library).

Using with Index Form

When using the SharePoint node on an Index Form, the window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

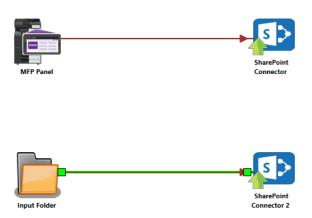
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Using SharePoint Index Form With Multiple Inputs

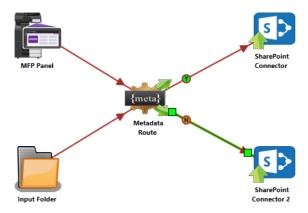
Once you associate your SharePoint node with a MFP Panel node's index form, all the information necessary to connect and route to a SharePoint site is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed SharePoint node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new SharePoint node that is not connected to an index form. See the following illustrations for examples:

Example 1. In this illustration, SharePoint configuration is entered at the MFP panel AND files are automatically collected from an Input Folder and routed to a predefined SharePoint site:



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Example 2. In this illustration, the Metadata Route node is used to determine which SharePoint node the files should go to. All files that come from the MFP Panel node automatically go to the indexed SharePoint node; all other files are routed to the other SharePoint node:

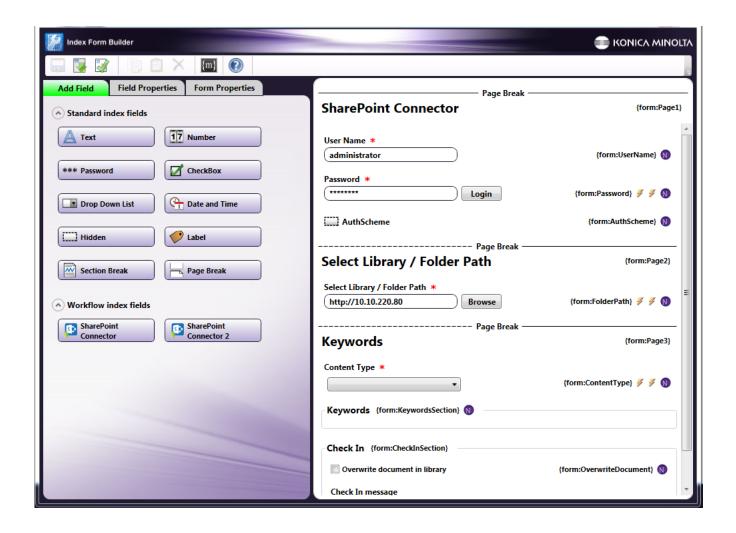


Creating A SharePoint Index Form

You can create an index form that allows you to upload scanned documents to SharePoint repositories at the MFP. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and SharePoint node.
- 2. Configure the SharePoint node to connect to the appropriate SharePoint server and libraries.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a SharePoint button under the Workflow Index Fields area.
- 4. Drag and drop the SharePoint button to the Index Form work area. If the SharePoint node has already been configured, an index form with prepopulated fields will appear; otherwise, an index form with blank fields will appear, as in the following illustration:

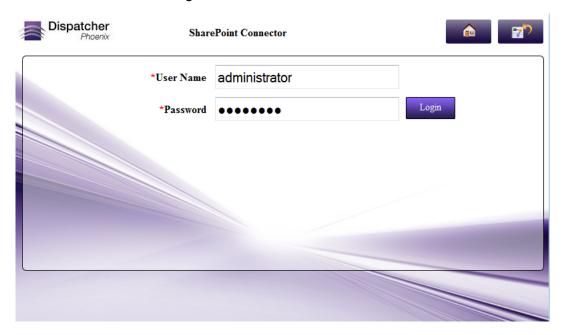
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SharePoint Index Form On MFP

At the MFP, the SharePoint Index Form will be separated into three separate screens, as follows:

1st screen: SharePoint Log In

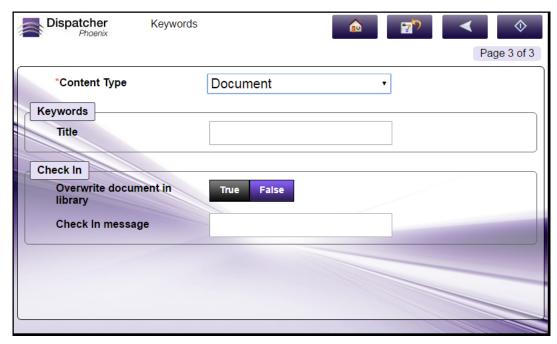


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2nd screen: SharePoint Libraries/Folders Displayed



3rd screen: SharePoint Keywords Displayed



Database Browsing - SharePoint Configuration

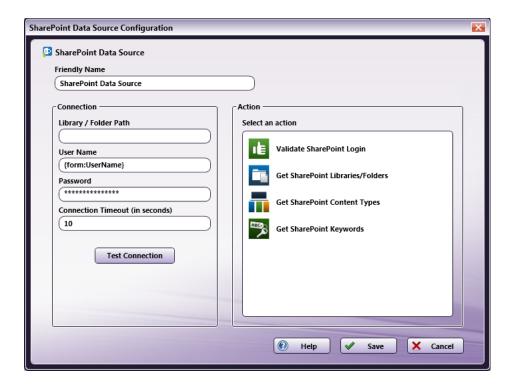
You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from SharePoint.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field; then add a **Query**.
- 3. Choose **SharePoint Data Source** from the **Query** drop-down list.

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4. The SharePoint Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from SharePoint.



Do the following:

- In the Friendly Name field, enter an identifying name for the SharePoint data source configuration.
- In the Connection area, provide the information necessary to connect to the SharePoint server.
- Select the **Test Connection** button to make sure that you are connected properly to SharePoint.
- In the Action area, choose what kind of action to perform on the SharePoint data source. Options include:
 - Validate SharePoint login Use this action to validate the login credentials that are entered at the MFP (user name and password) against the SharePoint data source. This action returns the following records:
 - [result] The result of the login: true or false
 - [message] Text regarding a successful or unsuccessful login.
 - Get SharePoint Libraries/Folders Use this action to display a list of the libraries and folders within the SharePoint site that you specified.
 - Get SharePoint Content Types Use this action to display a list of content types within the SharePoint site that you specified.
 - **Get SharePoint Keywords** Use this action to display the list of keywords belonging to the library that was selected. Since this retrieves dynamically created for fields, only use this action with the Expand Section Trigger.

You can click on the **Metadata** button to open up the Metadata Browser window and drag-and-drop metadata variables into the Keyword fields, if desired.

SharePoint Online Connector



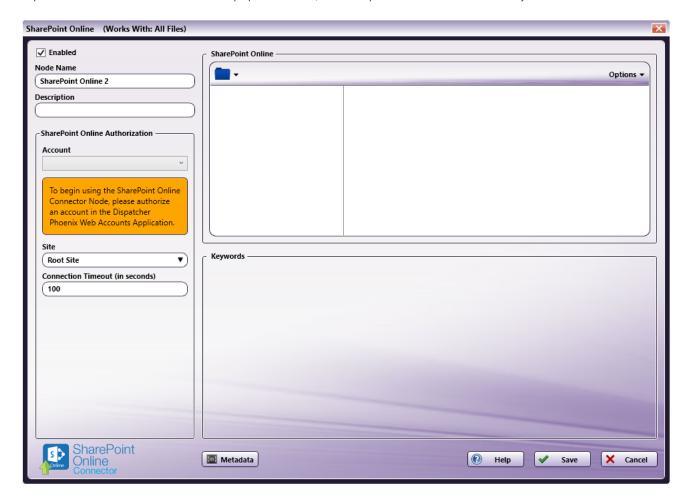
Use the SharePoint Online Connector node to distribute documents to SharePoint Online, Microsoft's platform that extends the functionality of existing "on-premises" SharePoint deployments using a cloud-based service. The connector allows you to send documents SharePoint Online via an automated workflow, or you can access SharePoint Online directly at the MFP panel.

Notes:

- $\bullet\,$ To use the SharePoint Online Connector, you must have a SharePoint Online account.
- The maximum file size for uploading documents to SharePoint Online is 250 GB.

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To open the SharePoint Online Connector node's properties window, add an output node for SharePoint Online to your workflow and double-click on it.



- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Configuring the SharePoint Online Connector

To configure the SharePoint Online Connector, you must first log into your SharePoint Online account via **Dispatcher Phoenix Web's Authentication Manager**. Once you complete this initial set up, logging into SharePoint Online within the node or at the MFP panel is no longer necessary, providing an optimized single-sign-on experience.

Note: If your organization has configured Microsoft Azure to require Admin permission for application registration at the machine, your administrator can override this restriction and allow users to register without an Admin present when creating accounts for SharePoint Online Connector. If you choose to configure SharePoint Online Connector in this way, we recommend the Admin log in first and grant consent before other users attempt to create their accounts. Otherwise, any account created for SharePoint Online Connector via Dispatcher Phoenix Web's Authentication Manager will require Admin credentials and the Admin will be the user registered.

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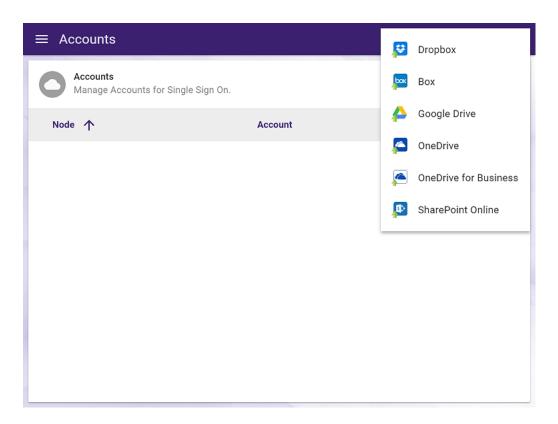
To override the Admin permission requirement when creating a SharePoint Online Connector account, follow the steps in the Set Up section below. In Step 4, log in using Admin credentials. If this is the first time the Admin logged in, the "Consent on behalf of your organization" checkbox will appear. Check the box at this field, then proceed to the next step in the Set Up procedure.

Important! The "Consent on behalf of your organization" option appears only the first time the Admin logs in. To regain this option, Dispatcher Phoenix must be removed from the Enterprise Applications list in Azure. The next time the Admin logs in, the option will appear.

Set Up

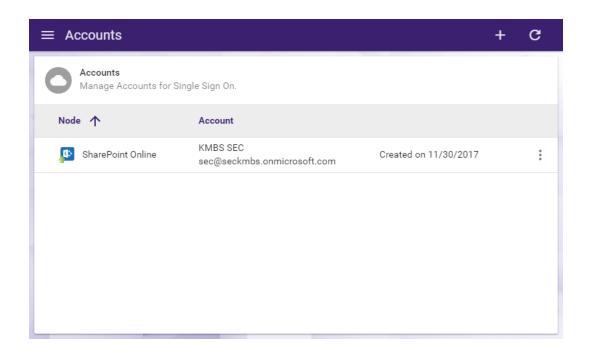
To begin, you must first log into SharePoint Online via Dispatcher Phoenix Web's Authentication Manager. Do the following:

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the **Accounts** tool on the Home page.
- 3. On the Accounts page, select the + button and choose the **SharePoint Online** option. See the following illustration:

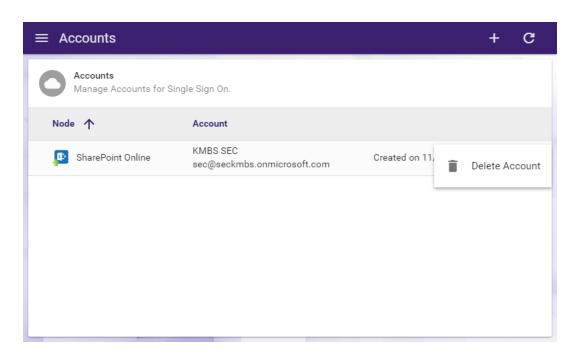


- 4. Log into SharePoint Online using your account credentials (email address/SharePoint Online account username and password).
- 5. Select **Yes** if asked for permission to let the application access your info.
- 6. The SharePoint Online account will now be listed on the Accounts page. See the following illustration for an example:

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7. If you need to delete the account, select the vertical ellipsis button and choose **Delete Account**, as in the following illustration:



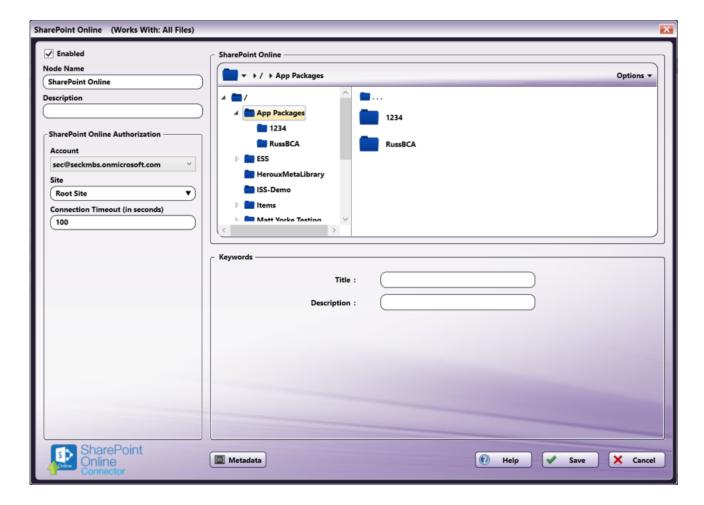
8. If you add multiple accounts, the first account you added will be marked as the Primary Account with a star icon. The benefit of a primary account is that when you sign into the MFP, you will have immediate access to this account. You can switch to a different account at the MFP by selecting the check icon, then selecting the back arrow icon on the next screen. You can also switch your primary account by selecting the vertical ellipsis button and selecting **Enable Primary Account**. You can also **Disable Primary Account** to always be prompted with the account screen at the MFP.

Customizing the SharePoint Online Connector Node

Once connected, the right hand side of the SharePoint Online node properties window displays a tree-view of your folders, sub-folders, and files in SharePoint Online. You can use this area to browse through your SharePoint Online folder structure and choose a folder to store your documents in.

See the following illustration for an example:

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To choose another SharePoint Online account, choose the account from the **Account** drop-down list.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Keywords

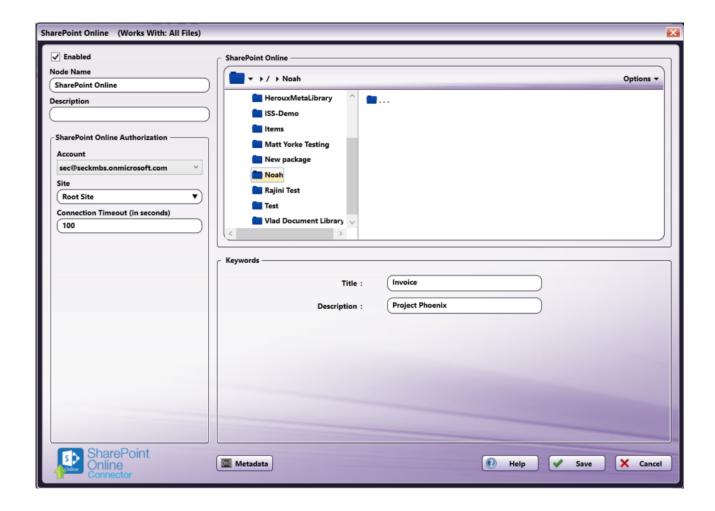
Below the SharePoint Online folder window is a window displaying Keywords, which are metadata tags used within SharePoint Online. Users can configure Keywords in two ways: during workflow setup and at the MFP panel through an Index Form.

Pre-Configured Keywords

Users can pre-populate Keyword fields and save the Keyword metadata. This will automatically apply those Keywords to any documents that pass through the SharePoint Online Connector.

See the following illustration for an example:

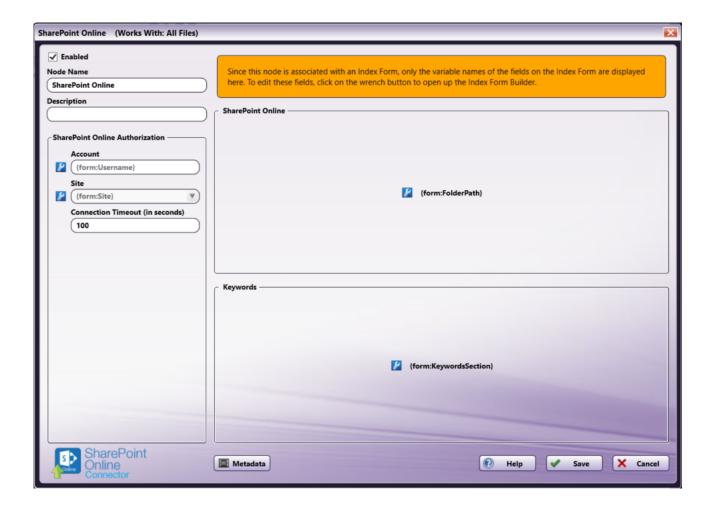
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Index Form Configuration

Users can also attach Keywords to documents as they are scanned through an attached Index Form. This Keywords area in the SharePoint Online Connector will display the connection to the Index Form. At the MFP, the Index Form automatically populates with the Keywords associated with the selected folder. Keywords have been integrated with the SharePoint Online Index Form and are pulled from the pre-set keywords associated with the selected folder. See the **Creating a SharePoint Online Connector Index Form** section below for more information.

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Supported Keywords

Below is a comprehensive list of the user-generated Keywords that the SharePoint Online Connector supports:

Column Property Name	Description	Supported?	
Name	Name of the column property	Yes. Shows as the label on the field	
Description	The user-facing description of the column	Yes. Shows as help text on the field	
Required	Whether the field is required to have a value	Yes	
Default Value	A value to prefill the field with	Yes	
Calculated Value	Whether the field uses other values to calculate its value	No	
Max Length	The maximum number of characters allowed in this field	Yes	
Enforce Unique Values	Whether the field is required to have unique values among all files in the list	Yes	
Column Validation Formula	Custom validation formulas validated by Sharepoint	Partial. Configured, Managed, and Enforced by Sharepoint, not DP	
Show Linked Columns	For multipart columns (such as Location), show parts of the value (such as City or Street) as other columns	Partial. Configured and managed by Sharepoint. Not shown in DP	
Min/Max Value	The minimum/maximum number allowed in this field	Yes	
Include Time	Whether to include time in a date field, making it a date/time field	Yes	
Friendly Format	Formats the date in a friendlier way	No	
Add Values Manually	Whether the user can add new values to a Choice dropdown	No	

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Column Property Name	Description	Supported?
Dropdown vs Radio	Whether the Choice will appear as a dropdown or radio buttons	No
Currency Format	How to format currency values	No
Multiselect	Whether dropdown fields allow for multiple selections	Yes. Renders in the node window as a list of checkboxes

Data Property Name	Description	Supported?
Text Single Line	This column stores a single line of text	Yes
Text Multi Line	This column stores multiple lines of text	Partial. Shows as single line text input
Choice	This column stores data from a list of choices	Yes
Number	This column store a number	Yes
Currency	This column stores a currency value	Yes
Date/Time	This column stores a date or a date/time	Yes
Lookup	This column's data is looked up from another source in the site	No
Yes/No	This column stores a yes/no (boolean) value	Yes. Shows as a checkbox
Person or Group	This column stores Person or Group values	No
Hyperlink or Picture	This column stores a URL	No
Calculated	This column shows a calculated value based on other columns	No
Image	This column stores an uploaded image file	No
Task Outcome	This column shows a task outcome value	No
External Data	This column shows data from an external data source	No
Managed Metadata	This column shows one or more terms set up in the Term Store Management Tool in Sharepoint	No
Location	This column shows address information	No

Notes:

- The SharePoint Online Connector does not support keyword indexing for the three SharePoint-controlled columns: Name, Modified or Modified By.
- The Currency keyword does not support minimum/maximum constraints.
- When using the Choice keyword, the SharePoint Online Connector will always upload a custom value, including metadata, even if the SharePoint Online account is set to not allow "fill-in" choices for this keyword.

Sending Documents to a New Folder

To create a new folder in SharePoint Online to scan to, select the New folder option from the Options drop-down menu or press Ctrl + Shift + N.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *
- Folder names are limited to 400 characters.

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View Options

You can adjust the default view of your SharePoint Online folders in the node properties window by using the Options button on the top right hand side of the window. Choose the following items from the Options pull-down menu:

- To turn off the default view, uncheck the **Show tree view** option or press **Ctrl + T**.
- To hide the files stored in SharePoint Online folders, uncheck the Show files option or press Ctrl + E.
- To create a new folder in SharePoint Online, select the New Folder option or press Ctrl + Shift + N.
- To search for a specific folder, select **Search** or press **Ctrl + S**. Searches are always performed from the root folder. Search results are limited to the first 1000 results. If the search returns a large number of folders, it is recommended that the user enter more specific search criteria to narrow down the search results.

Notes:

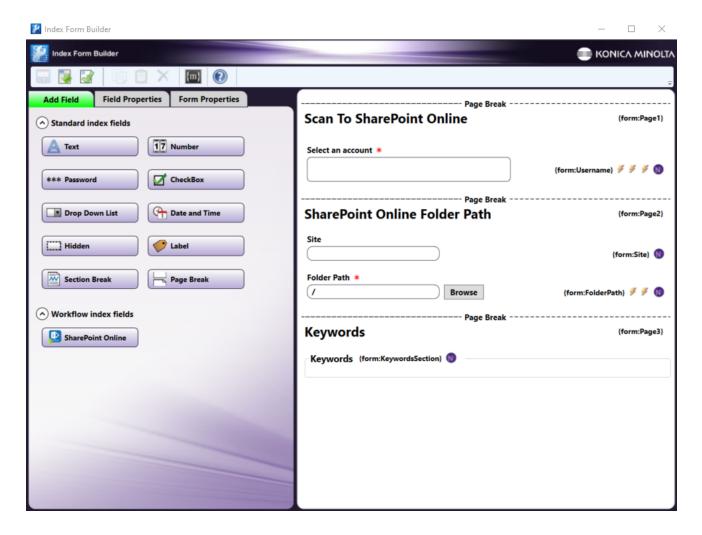
- · Symbols are not supported in the search string.
- Folder paths are limited to 400 characters.
- To refresh the current view with the most up-to-date folders/files, select the Refresh option or press F5.

Creating a SharePoint Online Connector Index Form

You can create an index form that allows you to log into SharePoint Online automatically at the MFP. Do the following:

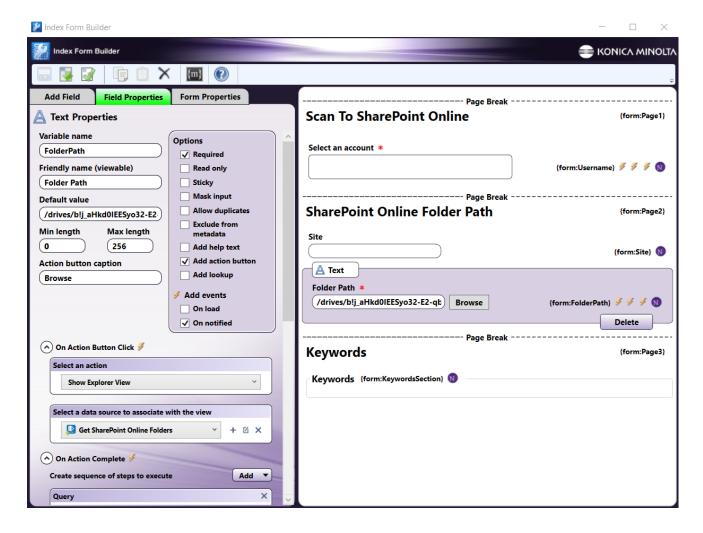
- 1. Make sure that you have logged into SharePoint Online from Dispatcher Phoenix Web's Account Manager.
- 2. Make sure that your workflow includes a MFP Panel node and SharePoint Online Connector node.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a SharePoint Online Connector button under the Workflow Index Fields area.
- 4. Drag and drop the **SharePoint Online Connector** button to the Index Form work area. A Scan to SharePoint Online index form will automatically appear, as in the following illustration:

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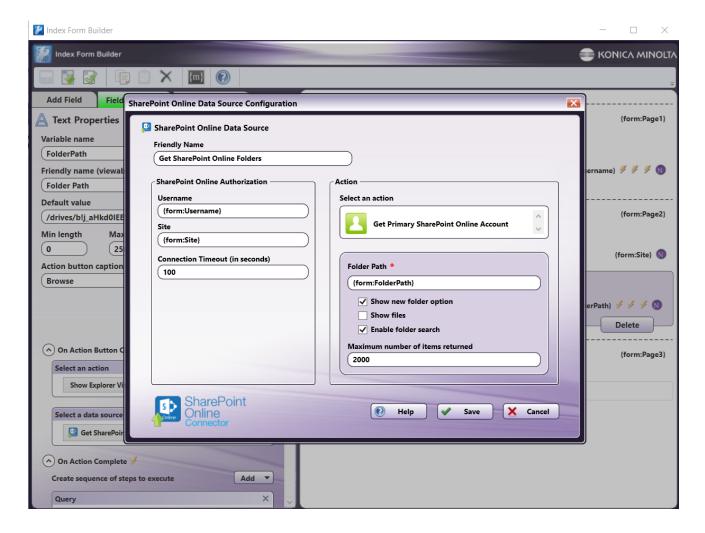
5. Make any updates or changes to the default settings by selecting a field. For example, you can enable folder search and folder browsing at the MFP by selecting the **Folder Path** field, as in the following illustration:

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Then, select the **Edit** icon next to the **Get SharePoint Online Folders** dropdown. On the following screen, check the box next to **Enable folder search** and update the **Maximum number of items returned** field, as shown in the following illustration:

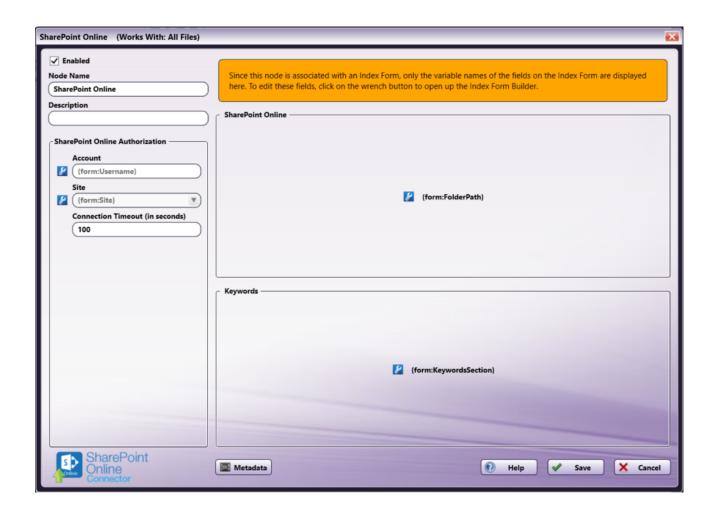
Konica Minolta 1139 / 1597



Note: The maximum number of folders returned during folder browsing is 2000.

- 6. Save and close the Index Form Builder.
- 7. The SharePoint Online Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

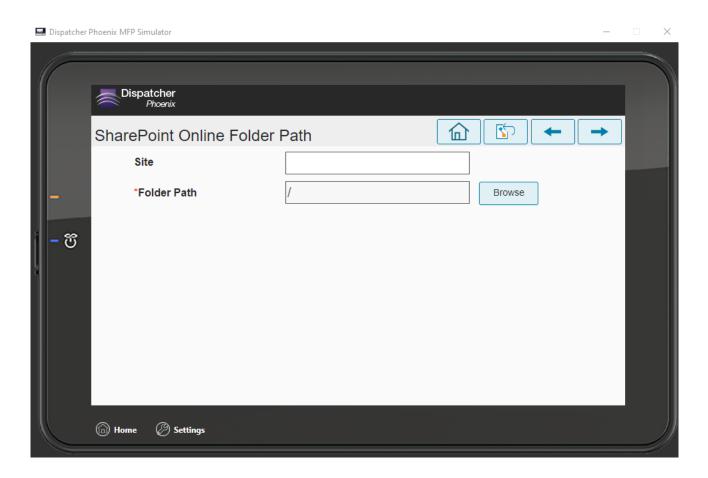
Konica Minolta 1140 / 1597



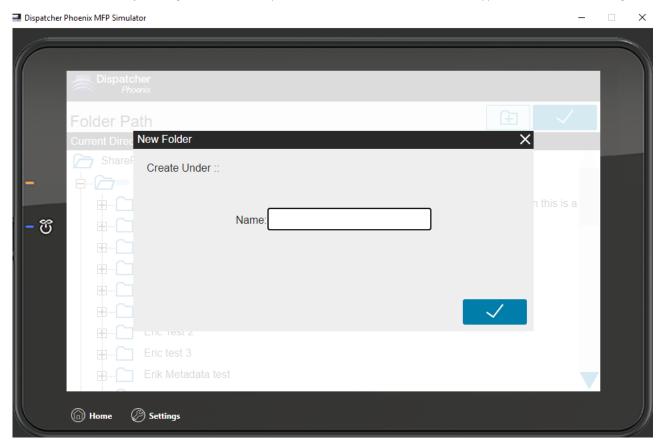
SharePoint Online Index Form on MFP

At the MFP, the SharePoint Online Index Form will appear as follows:

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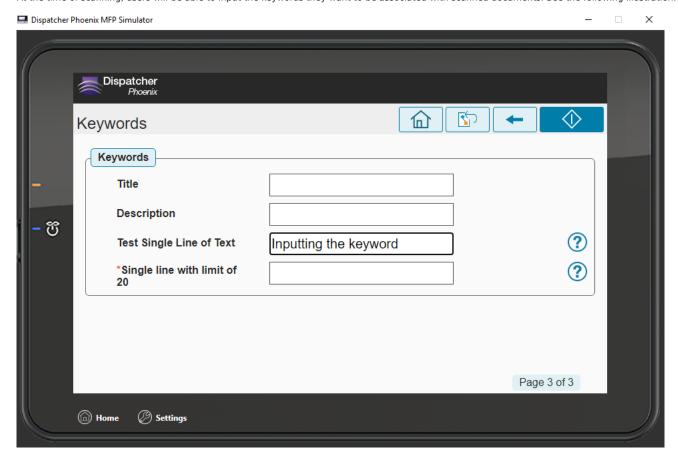


You can add a new folder by selecting the + icon at the top of the screen. The **New Folder** window will appear, as shown in the following illustration:



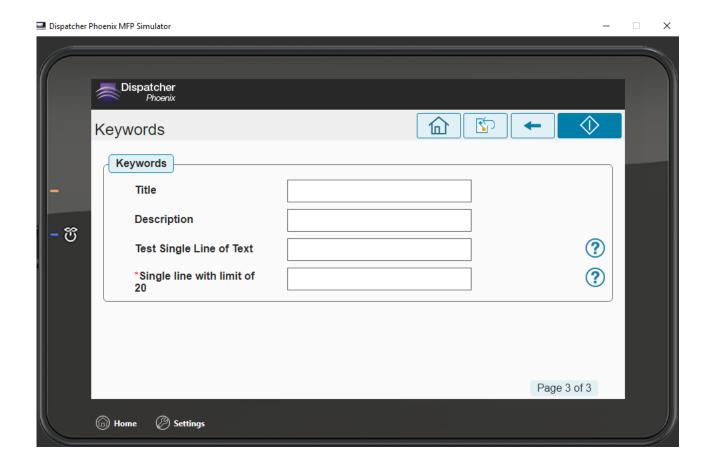
Konica Minolta 1142 / 1597

At the time of scanning, users will be able to input the keywords they want to be associated with scanned documents. See the following illustration:



Note: Keyword fields marked with an asterisk are required, as shown in the following illustration:

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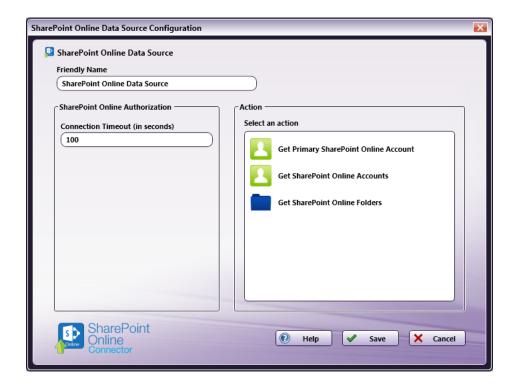
Database Browsing - SharePoint Online Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from SharePoint Online.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field; then add a **Query**.
- 3. Choose **SharePoint Online Data Source** from the **Query** drop-down list.
- 4. The SharePoint Online Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from SharePoint Online.

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Do the following:

- In the Friendly Name field, enter an identifying name for the SharePoint Online data source configuration.
- In the Action area, you can choose what kind of action to perform on the SharePoint Online data source. Options include:
 - Get Primary SharePoint Online Account This option returns the primary SharePoint Online account for the user.
 - Get SharePoint Online Accounts This option returns all the SharePoint Online accounts for the user.
 - Get SharePoint Online Folders Use this action to display a list of folders within a specific SharePoint Online Folder Path. When you select the Get SharePoint Online Folders item, new fields will appear for configuration, as in the following illustration:



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- Folder Path Enter the folder ID of the SharePoint Online root folder that you want displayed at the MFP panel.
- Show new folder option Check this option to allow the user to create a new SharePoint Online folder at the MFP.
- Show files Check this option to display files in SharePoint Online folders at the MFP.

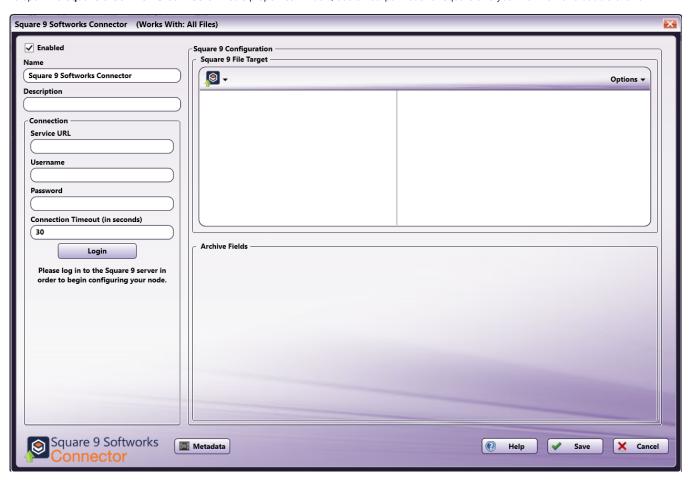
Square 9 Softworks Connector



The Square 9 Connector node allows you to distribute documents to Square 9, a popular Al-powered document processing platform. Documents can be sent to Square 9 via an automated workflow, or you can log into Square 9 directly at the MFP panel.

Note: To use the Square 9 Softworks Connector, you must have a Square 9 account.

To open the Square 9 Softworks Connector Node properties window, add an output node for Square 9 to your workflow and double-click on it.



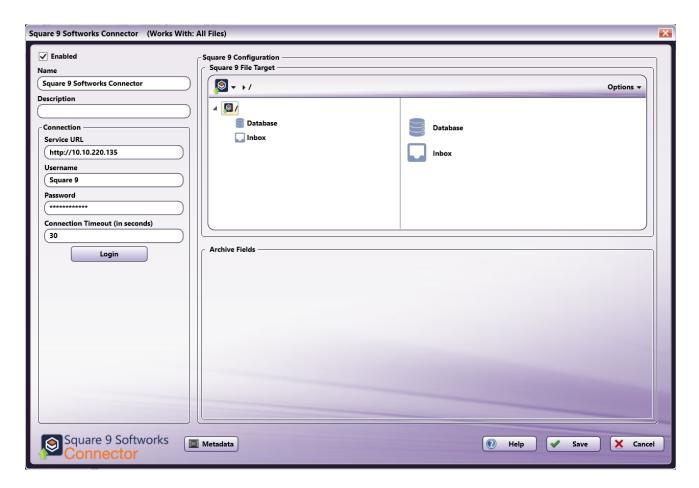
- **Enabled** To enable this node in the current workflow, ensure the **Enabled** box is checked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it. While the workflow will still validate, documents will not be output and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

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Connecting to Square 9

To begin, you must first connect to the Square 9 Server. In the Connection area, do the following:

- 1. In the Server URL field, enter the URL address of your Square 9 Server.
- 2. Enter your Square 9 Server user credentials in the Username and Password fields.
- 3. When you are done, select the **Login** button to connect to your Square 9 Server.



Configuring the Square 9 Softworks Connector

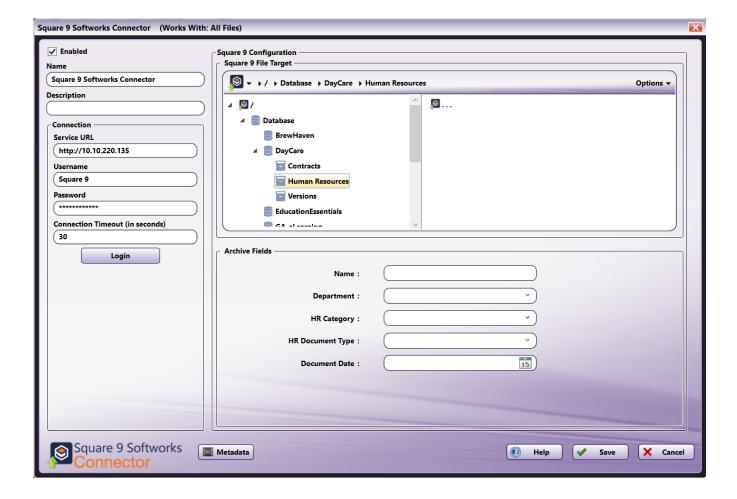
Once connected, the right hand side of the Square 9 Softworks Connector properties window displays a tree-view and listed view of your Square 9 Databases and Inboxes. The tree view is **optional** and can be turned off.

Selecting a Database or Inbox

Square 9 organizes documents in two ways: Databases and Inboxes. Databases are how Square 9 typically stores documents. Archives exist within databases and act much like folders. Inboxes are temporary repositories where documents can be reviewed by relevant parties before being indexed in a database.

After connecting to the Square 9 server, the Databases, Archives, and Inboxes available to the user will appear in the Configuration area. Navigate to the repository you would like to save documents to. Note that you must select an Archive or Inbox; selecting a database is not a valid configuration.

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Archive Fields

If you selected an archive to save documents to, the Archive Fields area will populate with the associated fields. Archive Fields contain additional information that is uploaded with the document.

Note: Archive Fields support a single line of text. The maximum length is defined within GlobalSearch.

Options

You can adjust the default view of your Square 9 archives in the node properties window by using the Options button on the top right hand side of the window. Do the following:

• Click on the **Options** button. The following drop-down menu will appear:

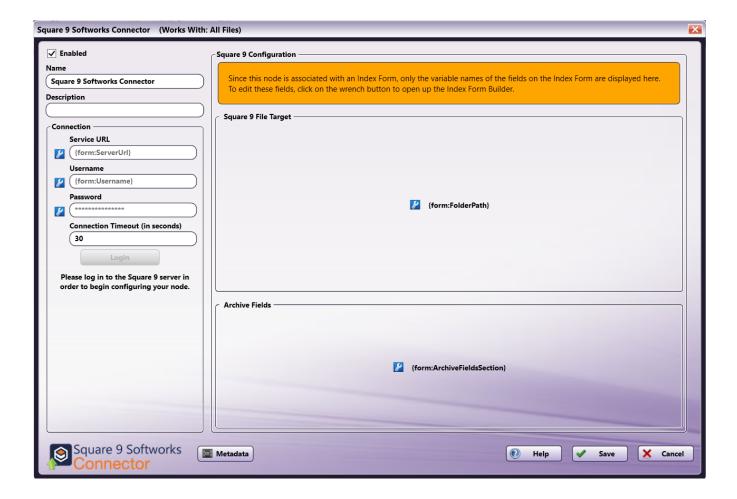


- To turn off the default view, uncheck the **Show tree view** option.
- To refresh the node's configuration area and display the most up-to-date databases, archives, and inboxes from Square 9, select the **Refresh** option. This will also refresh the Archive Fields section.

Using with Index Form

When using the Square 9 Softworks Connector node on an Index Form, the Square 9 Softworks Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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Creating a Square 9 Service Account Index Form

When the workflow is configured with a Service Account Index Form, users will be automatically logged into a single Square 9 account before they begin scanning. To create an Index Form that allows you to customize your **Square 9 Softworks Connector** node at the MFP, do the following:

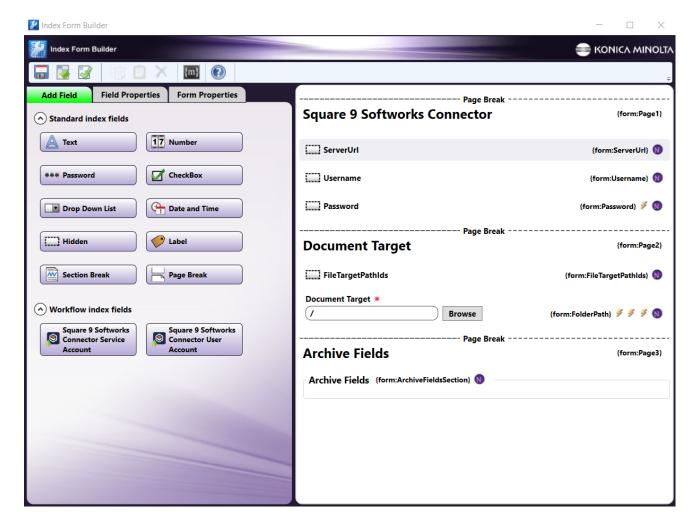
- 1. Make sure that your workflow includes a **Square 9 Softworks Connector** node.
- 2. Click on the Forms dropdown in the toolbar and select Create New Index Form to open the Index Form Builder, as in the following illustration:

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3. Select the **Blank Index Form** option in the pop-up. Then, drag the **Square 9 Softworks Connector Service Account** button to the Index Form Builder working area. Several fields will populate, as in the following illustration:

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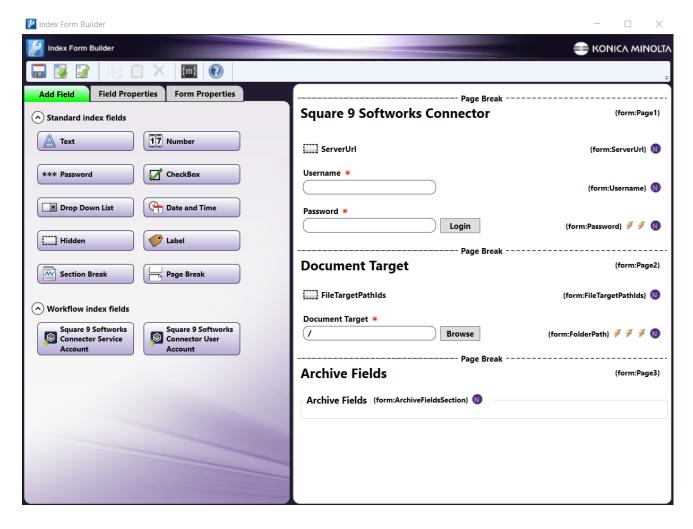
- 4. Select the ServerURL component and enter the server URL for the Square 9 installation in the Default value field.
- 5. Enter any additional information, such as **Username**, **Password**, any preconfigured Archive Fields, etc.
- 6. Validate, Save, and close the Index Form Builder.
- 7. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.

Creating a Square 9 User Account Index Form

When the workflow is configured with a User Account Index Form, you will be prompted to log into your Square 9 account at the MFP before you begin scanning and sending. To create an Index Form that allows you to customize your **Square 9 Softworks Connector** node at the MFP, do the following:

1. Follow steps 1 through 4 from the **Creating a Squre 9 Service Account Index Form**, except you click and drag the **Square 9 Softworks Connector User Account** button to the Index Form Builder working area.

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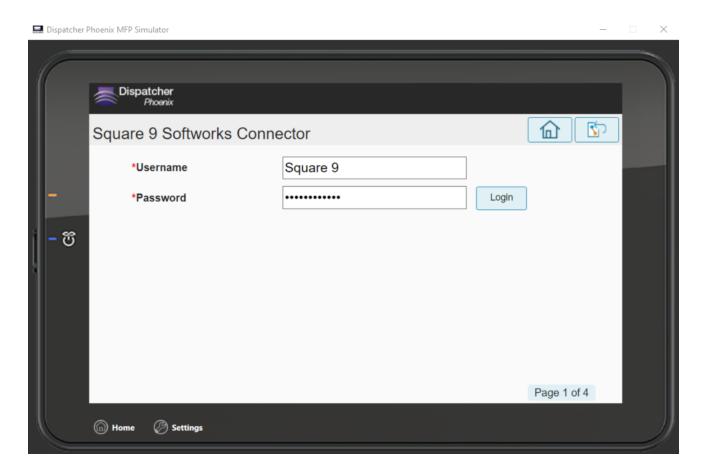
- 2. Enter any additional information, such as preconfigured Archive Fields.
- 3. Validate, Save, and close the Index Form Builder.
- 4. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.

Square 9 Index Form On MFP

When the Square 9 Softworks Connector is configured with an Index Form, the user will be able to enter their account credentials, browse through archives, and add any necessary additional information. To use the Square 9 Softworks Connector at the MFP Panel, do the following:

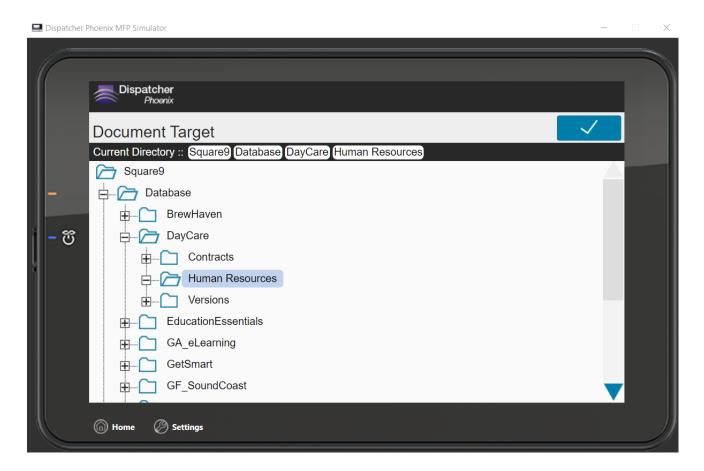
- 1. At the MFP, open the workflow containing the Square 9 Softworks Connector and the node associated with the Index Form that you have already configured.
- 2. If the Index Form was built using a properly preconfigured Service Account form, you will be automatically logged in. If the Index Form was built using a User Account form, you will need to provide the Username and Password, if they have not been preconfigured. Then, select **Login**.

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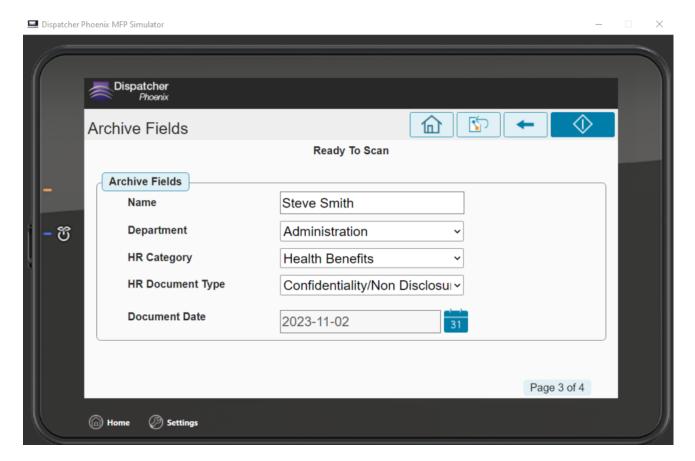
3. Browse for the Square 9 Document Target you would like to save to (Database/Archive or Inbox), as in the following illustration:

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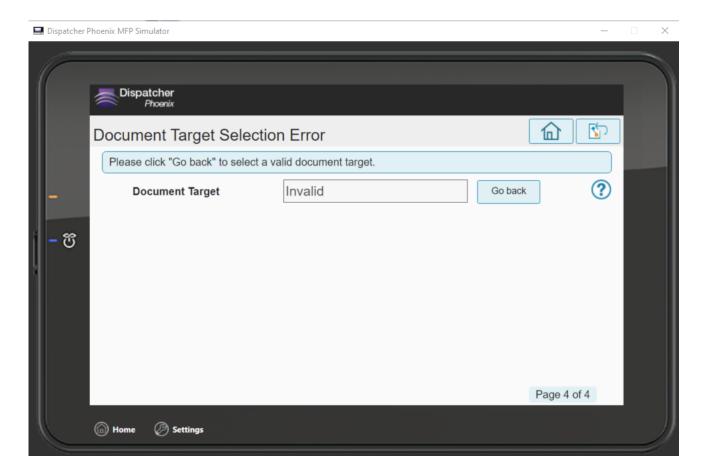
4. Enter any information needed in the **Archive Fields**, as in the following illustration:

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The workflow will only process documents if a valid Document Target is selected. For example, selecting a Database with no Archives (an invalid selection) within it will cause an error, as in the following illustration:

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Microsoft Teams Connector



Use the Microsoft Teams Connector node to distribute documents to Teams, an online file sharing and Cloud content management service for businesses. The connector allows you to send documents to Teams via an automated workflow, or you can access Teams directly at the MFP panel.

Note: To use the Microsoft Teams Connector node, you must have a Teams account.

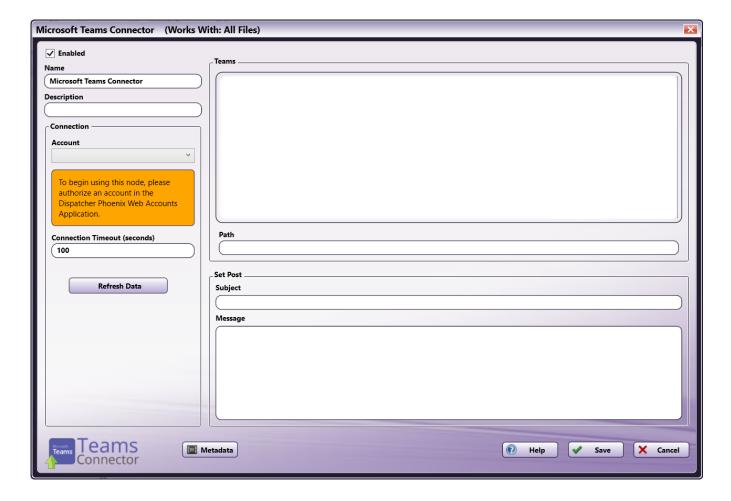
To open the Microsoft Teams Connector node's configuration window, add a Distribution node for Teams to your workflow and double-click on it.

Adding Your Teams Account

To utilize the Microsoft Teams Connector, the user must first add the Teams Account to Dispatcher Phoenix Web. For more information, see the **Dispatcher Phoenix Web Accounts** page.

Configuring the Microsoft Teams Connector

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- **Enabled** To enable this node in the current workflow, ensure the **Enabled** box is checked. By default, nodes are enabled upon creation. If you disable the node, the workflow will ignore it. While the workflow will still validate, documents will not be output and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Help To access Dispatcher Phoenix Online Help, click this button.
- Metadata To access the Metadata Browser window, click this button.
- Cancel To exit the window without saving any changes, click this button.
- ${\bf Save}$ To preserve your node configuration and exit the window, click this button.

Connection Setup

In the Connection area:

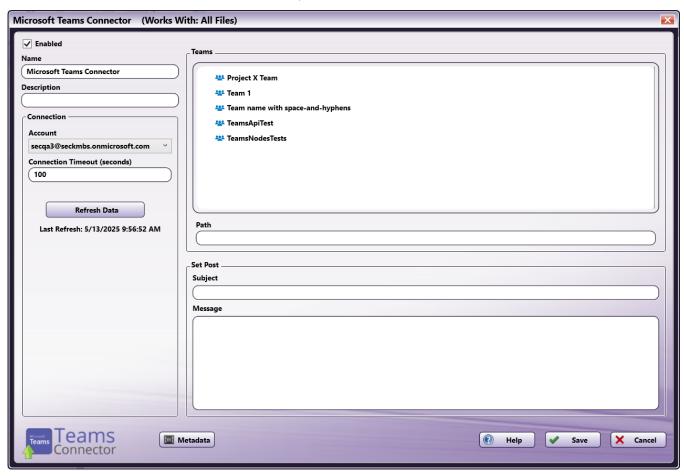
- Account Click the drop-down to see a list of authorized Microsoft Teams accounts. If no accounts appear, be sure the logon user accounts for Dispatcher Phoenix Web and Microsoft Teams must match.
- Connection timeout (in seconds) Specify the number of seconds you want to elapse before a network connection times out (i.e., for login or logout operations).
- Refresh Data Selecting this button will send a new request to Microsoft Teams to retrieve any updated teams and channels of the currently selected account.

Connecting to Teams

To connect to Microsoft Teams, do the following:

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1. In the Connection area, select a Teams account from the dropdown.



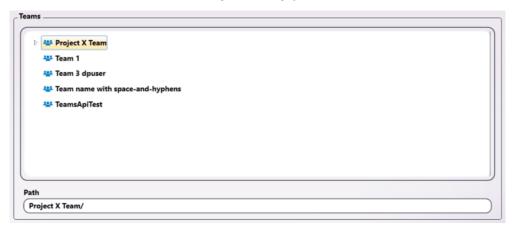
Note: If you have not already set up a Teams account through Dispatcher Phoenix Web, you must do this before it will appear in the dropdown.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Node Configuration

To begin sending messages, do the following:

1. In the Teams area, select one of the available teams. This will show the available channels within that team. Alternatively, you can enter the Team and Channel into the **Path** field using the following syntax: TeamName/ChannelName.

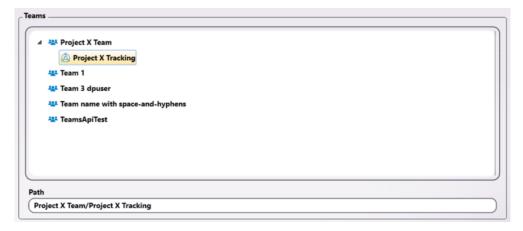


Notes:

 $\bullet~$ The ${\bf Path}$ field automatically populates with the Team and Channel as you select them.

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- The Path, Subject and Message fields support metadata. To add metadata to these fields, click on the Metadata button to open the **Metadata Browser** window. You can then drag-and-drop metadata variables into the appropriate fields.
- 2. Select one of the available channels.



- 3. In the Set Post area, enter the subject of the message in the Subject field.
- 4. Enter the message contents in the Message field.
- 5. Select the **Save** button to save the node configuration and close the node.

Important!

- It is a best practice to organize Teams and Channels with unique names to avoid confusion when using Microsoft Teams and the Microsoft Teams Connector; attempting to send messages and documents to Teams or Channels with identical names can produce unexpected outcomes.
- The Microsoft Teams Connector may experience errors with Team or Channel names longer than 240 characters.
- The Microsoft Teams Connector will upload 1 file per post even if the Input node has the "Process files as a group" option enabled.

Creating the Microsoft Teams Index Form

To set up the Microsoft Teams Connector with an attached Index Form, do the following:

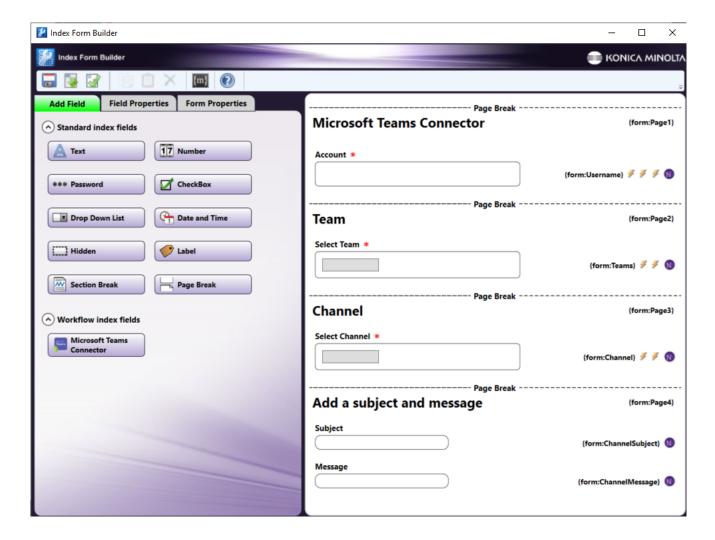
- 1. Add a node that is capable of attaching an Index Form (e.g. MFP Panel) to your workflow by dragging and dropping it into the Workflow Builder area, and connect it to the Microsoft Teams Connector.
- 2. Configure the Microsoft Teams Connector node according to the Application Setup section.
- 3. Open the node associated with the Index Form.
- 4. Click the **checkbox** next to Attach Index Form and then the + icon to open the Index Form Builder. Then, select the **Blank Index Form** option in the pop-up, as in the following illustration:

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5. Drag the Microsoft Teams Connector icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

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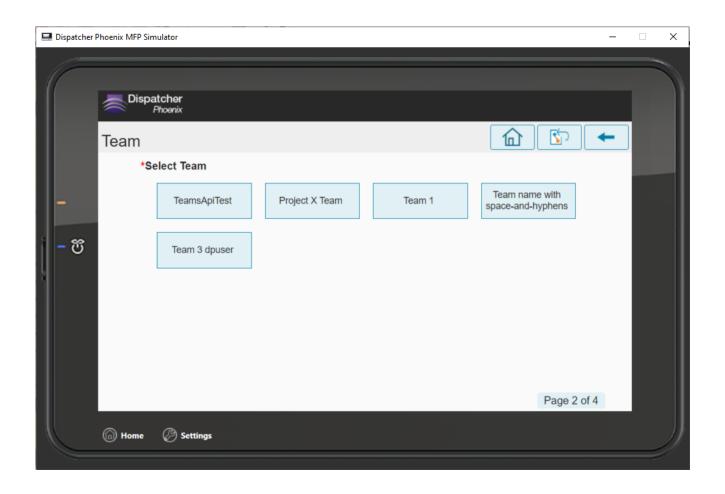
6. Validate, Save, and close the Index Form Builder.

Accessing Microsoft Teams on MFP

When the Microsoft Teams Connector is configured with an Index Form, the user will be automatically logged into the connected account when accessing the workflow from the MFP. To use the Microsoft Teams Connector at the MFP Panel, do the following:

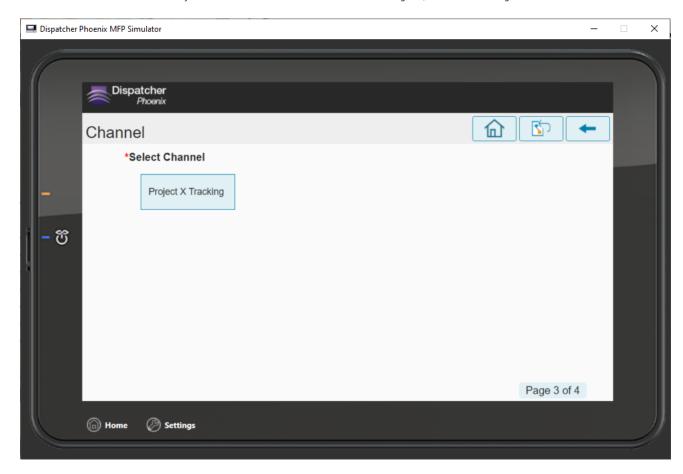
1. At the MFP, open the workflow containing the Microsoft Teams Connector and the node associated with the Index Form that you have already configured. Select the Team you would like to connect to, as in the following illustration:

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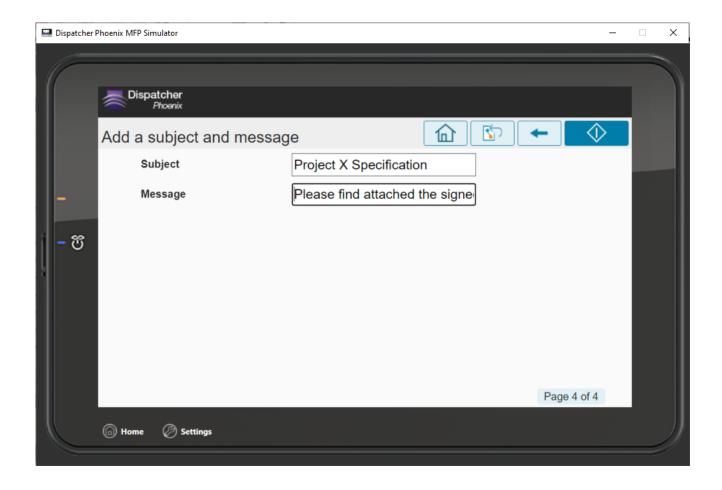
Konica Minolta 1162 / 1597

2. Select the Channel within that Team you would like to send the document and message to, as in the following illustration:



3. Enter a subject and message to be sent along with your attached file, as in the following illustration:

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Upland InterFAX Connector

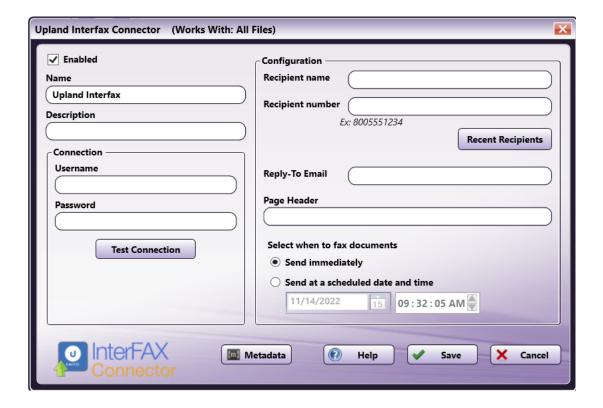


The **Upland InterFAX Connector** node is designed to allow new and existing Dispatcher Phoenix workflows to distribute files via Upland's webbased InterFAX system. Any documents routed through the **Upland InterFAX Connector** can be sent to a recipient specified by the node configuration window, node metadata, or data input at the MFP.

Important! For more information about limitations of the Upland InterFAX service, see the Upland InterFAX documentation.

Configuring the Upland InterFAX Connector

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- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions. By default, nodes are enabled upon creation.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- Metadata To access the Metadata Browser window, click this button.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Cancel To exit the window without saving any changes, click this button.
- Save To preserve your node definition and exit the window, click this button.

Application Setup

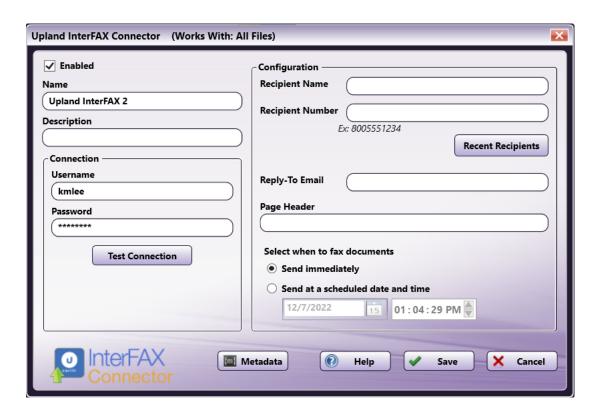
To open the **Upland InterFAX Fax Connector** node configuration window, add a distribution node for InterFAX, then double-click on it.

Connecting to Upland InterFAX

To connect to Upland InterFAX, do the following:

 $1. \ \, \text{Enter the } \textbf{Username} \ \, \text{and } \textbf{Password} \ \, \text{for the Upland InterFAX, as in the following illustration:}$

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2. Then, select **Test Connection**. If the connection is successful, a confirmation message will appear, as in the following illustration:



Configuring the Upland InterFAX Connector

After connecting to Upland InterFAX, you will be able to enter more information about the recipient and the documents to be faxed. To configure the **Upland InterFAX Connector**, do the following:

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1. Enter the **Recipient name** and **Recipient number** in the fields. These fields are required to successfully upload a document to the Upland InterFAX system.

Notes:

- The **Recipient number** field only accepts numbers or metadata. The node can be saved with other characters in this field, but the workflow will fail to validate. To add metadata to these fields, click on the **Metadata** button to open the Metadata Browser window. You can then drag-and-drop metadata variables into the appropriate fields.
- If a configuration field contains the curly bracket character ({), then the administrator must add an additional curly bracket next to it to prevent the node from attempting to read the entry as metadata. For example, a contact named "Cynthia {ABC Corp}" would need to be entered as "Cynthia {{ABC Corp}"
- · Recipient Name and Recipient Number fields have a maximum length of 100 characters.

You can also use the **Recent Recipients** button to open a window containing the fax information for up to ten (10) of the most recent numbers faxed to. These numbers are displayed chronologically with the most recent number at the top. Use the **Clear Recent Recipients** button to delete all recent recipients.

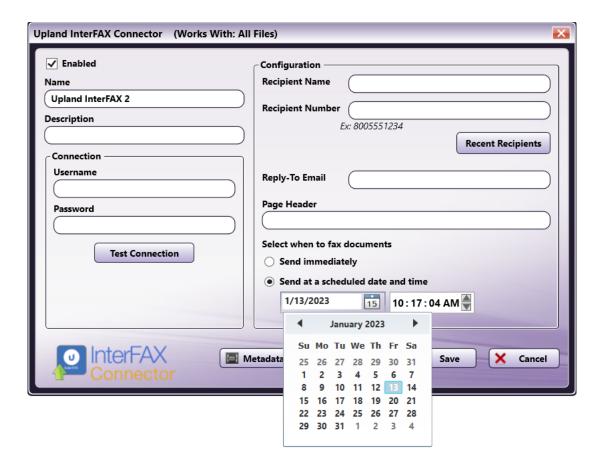


- 2. You can also enter a Reply-To Email and Page Header, if necessary.
- 3. Select when you would like documents sent via InterFAX.
 - Send immediately This faxes documents as soon as they are uploaded to InterFAX.
 - Send at a scheduled date and time Enter or select a date and time that InterFAX will send the uploaded documents.

Note:

- If you attempt to send documents at a scheduled date/time that has already passed, the documents will be faxed immediately.
- Sending a fax can delay until after the specified date and time. Fax submission into the system can be delayed for up to 30 days.

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Creating the Upland InterFAX Index Form

When the workflow is configured with an Index Form, you will be prompted to log into your Upland InterFAX account at the MFP before you begin scanning and sending. To create an Index Form that allows you to customize your **Upland InterFAX Connector** node at the MFP, do the following:

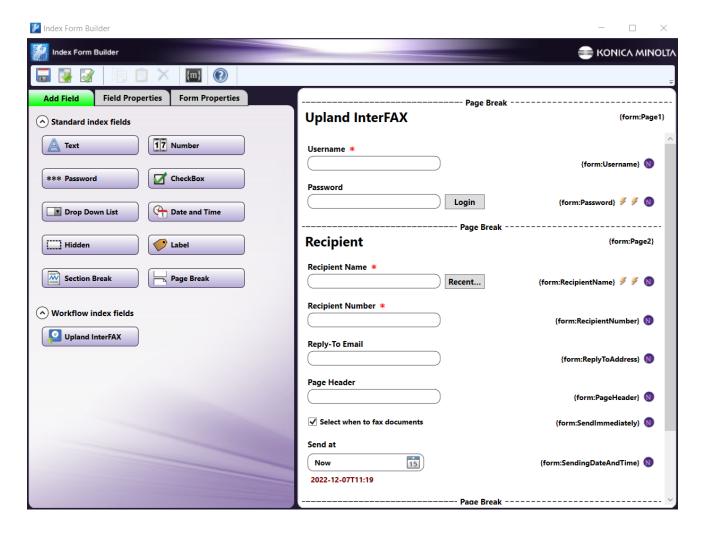
- $1. \ \ \text{Make sure that your workflow includes a } \textbf{Upland InterFAX Connector} \ \ \text{node}.$
- 2. Click on the Forms dropdown in the toolbar and select Create New Index Form to open the Index Form Builder, as in the following illustration:

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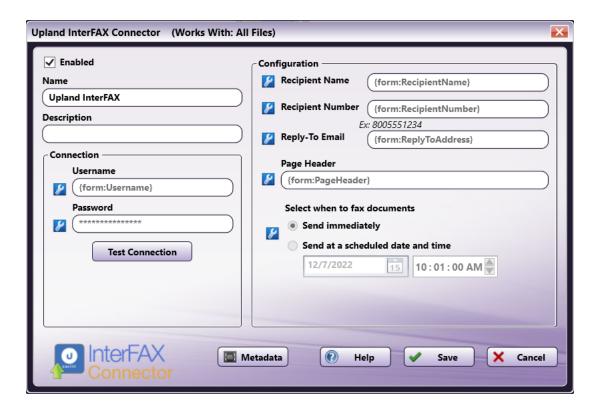
3. Select the **Blank Index Form** option in the pop-up. Then, drag the **Upland InterFAX Connector** icon to the Index Form Builder working area. Several fields will populate, as in the following illustration:

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- 4. Validate, Save, and close the Index Form Builder.
- 5. Attach the Index Form to a node that supports Index Forms, such as the MFP Panel node, Web Capture node, or Release2Me node.
- 6. The **Upland InterFAX Connector** node properties window will automatically populate with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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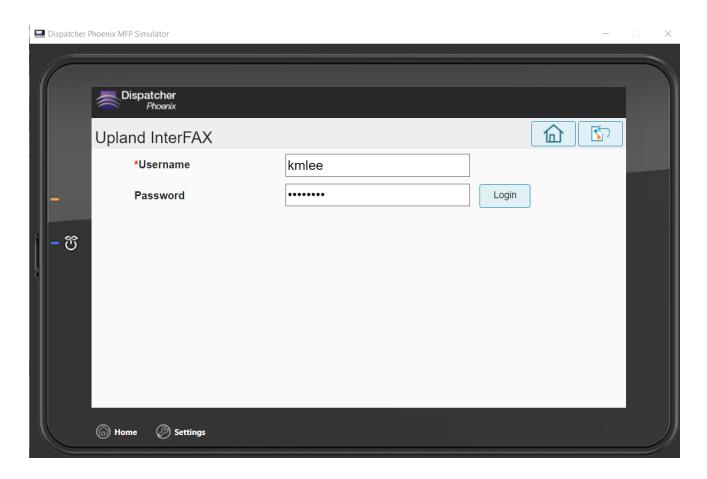


Accessing InterFAX on MFP

At the MFP, take the following steps:

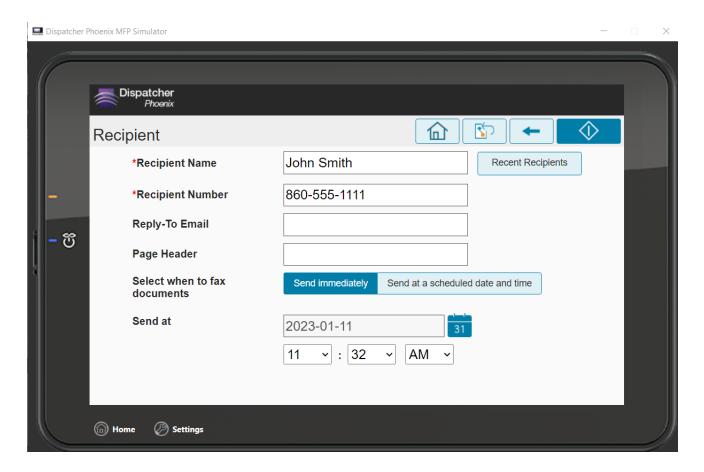
- 1. **Select your workflow** If only one Dispatcher Stratus workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
- 2. Enter your login credentials If an InterFAX account has not been configured during node setup, you will need to enter your account information.

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3. Enter the Recipient Information - When you are logged in, you can enter the name and fax number of the intended fax recipient. If necessary, you can also enter the Reply To Email and Page Header and update the fax time, if necessary. See the following illustration:

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4. Once you have entered the necessary information, select the "Scan" button to initiate the scanning process. The scanned documents are sent to the Upland InterFAX service and faxed immediately or at the selected date and time.

WebDAV Connector

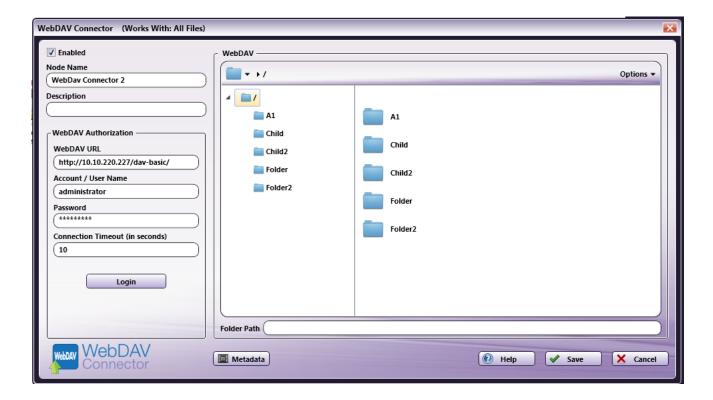


WebDAV (Web-based Distributed Authoring and Versioning) is a standard protocol allowing users to access files on remote web servers. The Dispatcher Phoenix WebDAV Connector allows you to browse folders and upload files on a WebDAV Server. Documents can be sent to a WebDAV Server via an automated workflow, or you can log into the WebDAV Server directly at the MFP panel.

 $\textbf{Note:} \ \ \textbf{To} \ \ \textbf{use the WebDAV Connector, you must have access to a WebDAV Server.}$

To open the WebDAV Connector node's properties window, add an output node for WebDAV to your workflow and double-click on it.

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- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the Node Name field, enter a meaningful name for the WebDAV Connector node.
- In the **Description** field, enter a description for the WebDAV Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the WebDAV Connector

To configure the WebDAV Connector, you must first connect to your WebDAV Server; then you can specify an existing WebDAV folder or create a new folder to send files to.

Connecting To WebDAV

To begin, you must first connect to the WebDAV Server. In the WebDAV Authorization area, do the following:

- 1. In the WebDAV URL field, enter the URL address of your WebDAV Server.
- 2. Enter your WebDAV Server user credentials in the Account / User Name and Password fields.
- 3. Change the seconds allotted for the time without communication (after the initial connection to the server) before a timeout occurs using the **Connection Timeout** field, if necessary. The default timeout value is 30 seconds.
- 4. When you are done, select the **Login** button to connect to your WebDAV Server.

Selecting A Folder

Once connected, the right hand side of the WebDAV node properties window displays a tree-view of your WebDAV folders and documents that allows you to browse through your WebDAV folders and select a folder for your documents.

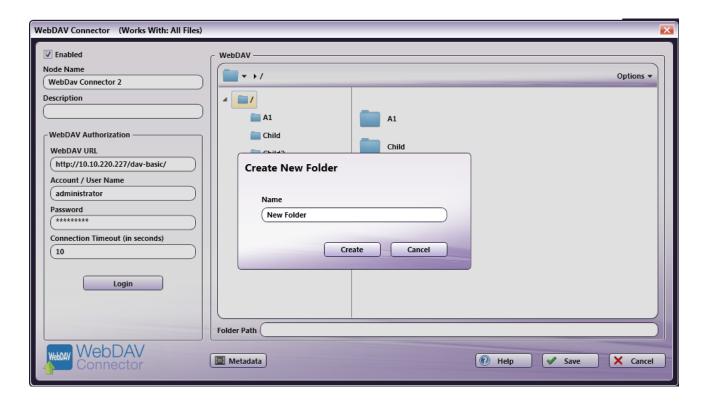
Sending Documents To A New Folder

You can also choose to create a new folder in WebDAV to send documents to. Do one of the following:

• Select the **New folder** option from the **Options** drop-down menu.

In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view. In the following illustration, a new folder called "New Folder" is being created as a subfolder within the Financial Documents folder.

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- Enter a new folder name in the Folder Path field.
- Use metadata to specify a folder path at run time.

For example, you could use zonal OCR to extract client names from incoming documents and then use that OCR metadata in the Folder Path field. In this case, a folder name with the client name will be created on the WebDAV Server and documents will be automatically uploaded to that new folder at run time.

Note: You cannot create a folder within a folder that does not already exist. For example, you cannot use two different metadata variables to create a folder within a folder (e.g., {bates:Counter}/{file:name}).

To use metadata, do the following:

- 1. Select the **Metadata** button to open up the Metadata Browser window.
- 2. On the Metadata Browser window, select the metadata variable you are interested in; then drag-drop it to the Folder Path field.
- 3. Select the Close button on the Metadata Browser window.

File Name Restrictions

The following restrictions apply to file names:

- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *

View Options

You can adjust the default view of your WebDAV folders in the node properties window by doing the using the Options button on the top right hand side of the window. Do the following:

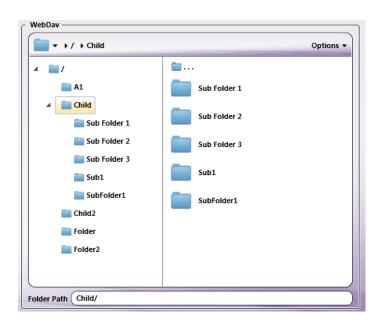
• Click on the **Options** button. The following drop-down menu will appear:

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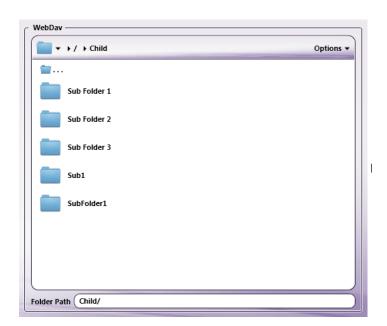


To turn off the default view, uncheck the **Show tree view** option.
 See the following illustrations for comparison on the different folder views available:

Tree View ON



Tree View OFF



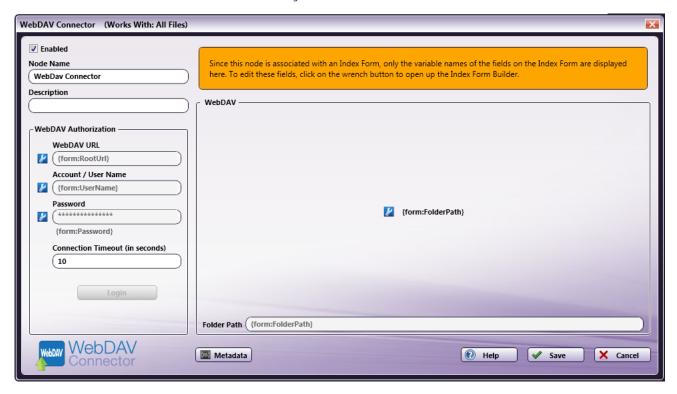
- To hide the files stored in WebDAV folders, uncheck the $\bf Show\ files$ option.

 $\bullet \ \, \text{To refresh the current view with the most up-to-date folders/files, select the } \textbf{Refresh} \ \text{option}.$

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Using with Index Form

When using the WebDAV Connector node on an Index Form, the WebDAV Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:



Using WebDAV Connector Index Form With Multiple Inputs

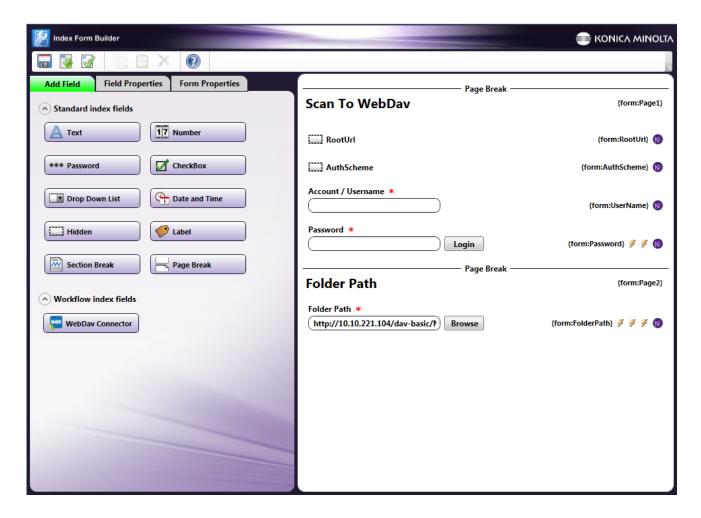
Once you associate your WebDAV Connector node with a MFP Panel node's index form, all the information necessary to connect and route to WebDAV is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed WebDAV Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new WebDAV node that is not connected to an index form.

Creating A WebDAV Server Index Form

You can create an index form that allows you to upload scanned documents to a generic WebDAV server at the MFP. Do the following:

- 1. Make sure that your workflow includes a MFP Panel node and WebDAV Connector node.
- 2. Configure the WebDAV Connector node to connect to the appropriate WebDAV server and folders.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a WebDAV Connector button under the Workflow Index Fields area.
- 4. Drag and drop the **WebDAV Connector** button to the Index Form work area. A Scan to WebDAV index form will automatically appear, as in the following illustration:

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5. Save and close the Index Form Builder.

Note: As an alternative, you can create a WebDAV Index Form without customizing the WebDAV Connector first. In this case, do the following:

- 1. Create a workflow with a MFP Panel node and WebDAV Connector node.
- 2. Customize the MFP Panel node with a blank Index Form.
- 3. Drag-drop the $\mbox{WebDAV Connector}$ button to the Index Form Builder's work area.
- 4. Configure the **Default value** field for the **RootURL** hidden field with the WebDAV Server's URL. Note that you must include "http://" or https:// as part of the URL address.
- 5. Configure the WebDAV Data Source Configuration window's Folder Path field with the complete path of the WebDAV Server's folder.
- 6. Save the Index Form Builder.

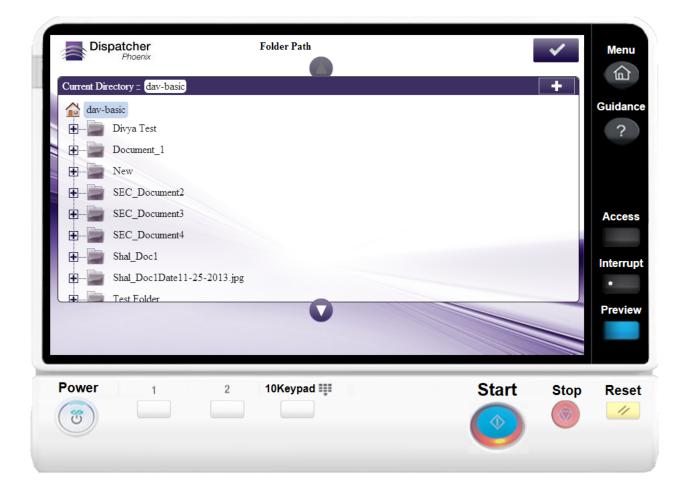
WebDAV Index Form On MFP

At the MFP, the WebDAV Index Form will be separated into three separate screens, as follows:

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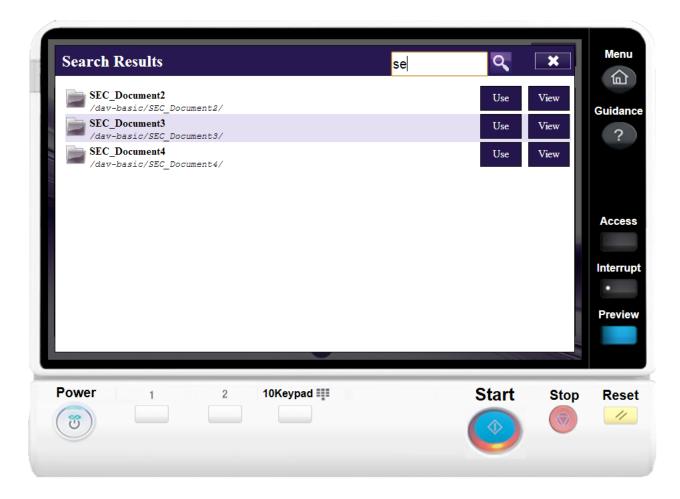
Konica Minolta 1179 / 1597



A **Search** field is provided for you to use to narrow the list of folders. This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly (searching only the first level of sub-folders from the current path).

- A wildcard asterisk (*) can be used to represent more characters in a string of characters. For example, if entering inv* in the Search field, the folder results would display any folders that *begin* with those three letters (e.g., inv01, inv02, invoice, etc.). Or, if entering *inv in the Search field, the folder results would display any folders that *end* with those three letters (e.g., 01inv, 02inv, etc.)
- A wildcard question mark (?) can be used to represent an arbitrary character. For example, if entering INV0? in the Search field, the folder results would display INV01, INV02, INV03, etc.

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Once the folder list is filtered per your search, you can do the following:

- Tap on the **Use** button to select that particular folder.
- Tap on the **View** button to return to a directory structure view of that particular folder.
- $\circ~$ Release the filter by tapping on the \boldsymbol{X} button next to the Search field.
- $\circ~$ Tap on the Search icon next to the field to submit the search criteria again.

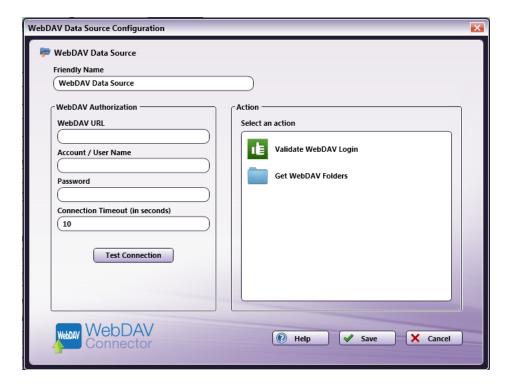
Database Browsing - WebDAV Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from a WebDAV Server.

Using the Index Form Builder, do the following:

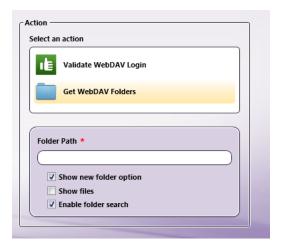
- 1. Add a new field, such as a drop-down list.
- 2. Define an ${f On\ Load}$ event for the field; then add a ${f Query}$.
- 3. Choose $\mbox{\bf WebDAV}$ $\mbox{\bf Data Source}$ from the $\mbox{\bf Query}$ drop-down list.
- 4. The WebDAV Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from the WebDAV Server.

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Do the following:

- In the **Friendly Name** field, enter an identifying name for the WebDAV data source configuration.
- In the WebDAV Authorization area, provide the information necessary to connect to the WebDAV Server.
- Select the **Test Connection** button to make sure that you are connected properly to the WebDAV Server.
- In the **Action** area, choose what kind of action to perform on the WebDAV data source. Options include:
 - Validate WebDAV Login Use this action to validate the login credentials that are entered at the MFP (user name and password) against the WebDAV data source. This action returns the following records:
 - [result] The result of the login: true or false
 - [message] Text regarding a successful or unsuccessful login.
 - Get WebDAV Folders Use this action to display a list of folders with a given WebDAV Server root path. When you select the Get WebDAV Folders item, you can configure the following fields:



- Enter the WebDAV Server's root path in the **Folder Path** field
- Check the **Show new folder** option if you want to be able to create a new folder to scan your documents to at the MFP panel.
- Check the **Show files** option to view a list of files that are included in each subfolder at the MFP panel.

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• Enable folder search - Check this option to display a Search field that can be used to filter the list of WebDAV folders displayed on the panel. Note that the Search field includes type ahead functionality. This option is enabled by default.

Windows Fax Connector

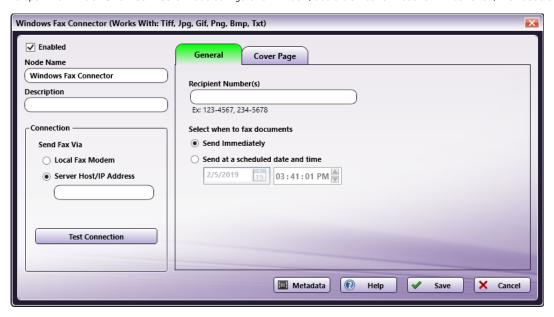


The **Windows Fax Connector** node is designed to allow new and existing Dispatcher Phoenix workflows to distribute files via a local fax modem. Any documents routed through the Fax Distribution Node can be sent to a recipient specified by the node configuration window, node metadata, or data input at the MFP. Optionally, a cover sheet can be included with each item that is faxed, which will contain additional metadata pertaining to the faxed document, such as the sender's name, recipient's name, and any other additional notes.

Prior to configuring the **Windows Fax Connector** node, please ensure your fax modem or server are configured according to the Windows Fax and Scan user guide. In addition, open **Windows Fax and Scan Setup**. Then, go to **Fax Setup** and select your fax medium, either modem or server, to complete the pre-configuration process.

By default, when using a fax modem the Windows Fax service only allows administrators to send faxes on some operating systems. To enable single-user access or additional group access you will need to grant permission to all fax components in Microsoft Fax Service Manager.

To open the Windows Fax Connector node configuration window, add a distribution node for Windows Fax, then double-click on it.



Do the following:

- 1. Make sure the **Enabled** box is checked. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be distributed and may be lost.
- 2. In the ${\bf Node\ Name}$ field, enter a meaningful name for the Windows Fax Connector.
- 3. In the **Description** field, enter a description for the Windows Fax Connector. Although this is not required, it can be helpful to distinguish between multiple distribution points. If the description is long, you can hover the mouse over the field to read its entire contents.
- 4. In the **Connection** area, select how to send your fax:
 - Local Fax Modem: Select to send documents out of the workflow using a fax modem and phone line connected to your PC.
 - Sever Host/IP Address: Select to use a fax server to distribute files via fax.
- 5. Use the **Test Connection** button to verify the system is properly configured to distribute documents via fax.
- 6. The **General** tab includes fields that allow you to specify the Recipient Number(s) and Fax Settings. These fields can also be accessed and filled out at the MFP during scan time.
 - Configure Fax Settings:

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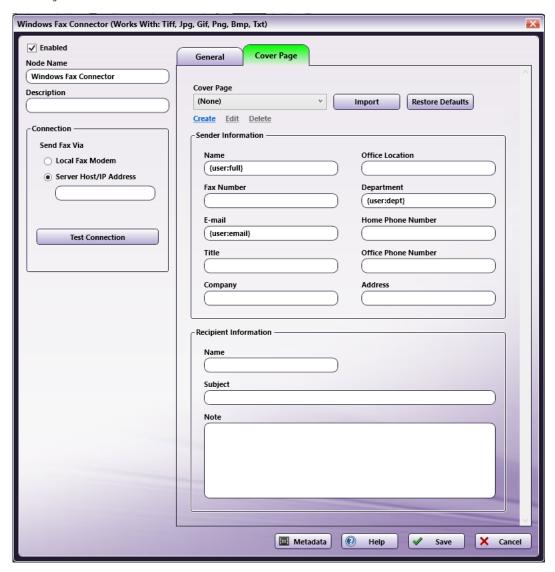
- Recipient Number(s): enter in the recipient number(s) where the fax should be sent. This field can be configured with a single fax number for can contain a comma-separated list of several numbers Ex. 1-555-123-4567, 1 5551234567 or 4567.
- Select when to fax documents: Select the radio button for:
 - Send Immediately The fax will be sent as soon as the file is outputted through the Windows Fax Connector.
 - Send at a scheduled date and time Select a specific date and time when the fax should be sent to the recipient.
- 7. The Cover Page tab includes fields that allow you to select and customize the Cover Page which can be included with the fax.

Note: All the fields on the Cover Page tab, and the Recipient Number(s) field on the General tab accept Metadata. To browse for Metadata to add to the field, click on the **Metadata** button and the **Metadata Browser** window will appear. Using this window, you can drag-and-drop metadata variables from the **Metadata Browser** into the appropriate open text fields.

8. Select the **Save** button to keep the Windows Fax Connector Out node configuration. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

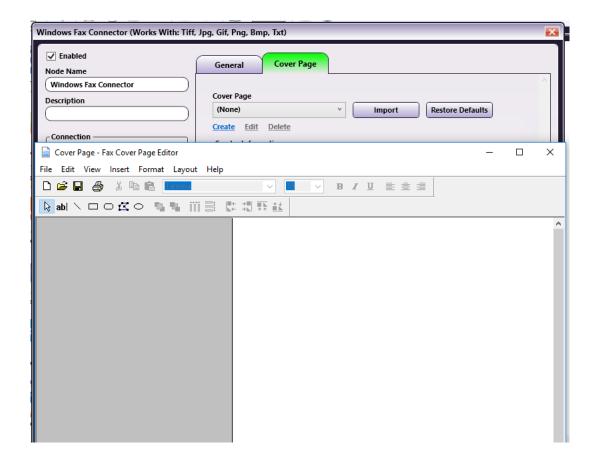
Inserting a Cover Page

To insert a cover page that will be send with the faxed document, open the **Windows Fax Connector** node and navigate to the **Cover Page** tab on the configuration window.



- 1. From the **Cover Page** dropdown, select the template you wish to use for the cover page. By default, the Windows Fax Connector comes with the following Microsoft Fax Cover Pages: FYI, Urgent, Generic and Confident.
 - To create a new cover page template, Click Create from beneath the cover page dropdown. The Cover Page Editor will open in a separate
 window. The Cover Page Editor is a Windows Fax and Scan tool that allows you to create and edit Cover Pages for use with your
 outgoing Windows Faxes.

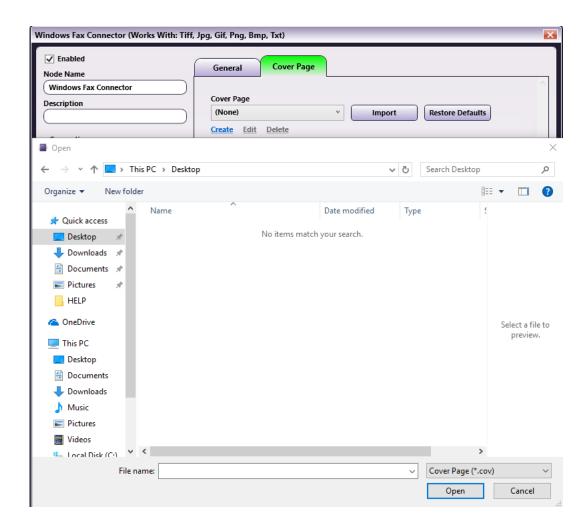
Konica Minolta 1184 / 1597



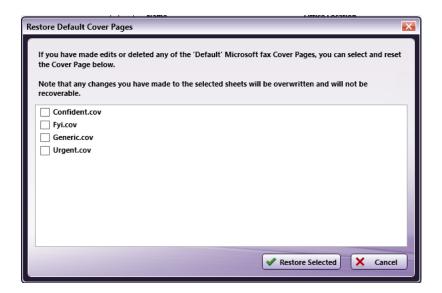
Note: New cover pages created in the Cover Page Editor will be automatically saved to the folder located at the following path: C:\Users\QA\Documents\Fax\Personal CoverPages. Cover pages saved at this location will automatically be copied to the program data for Dispatcher Phoenix and available in the cover page dropdown. For this reason, cover pages saved to any other location will need to be imported to the Dispatcher Phoenix Windows Fax Connector.

- $\circ~$ To edit an existing template, select the template from the dropdown and click on Edit.
- $\circ~$ To delete a template from the available cover page template list, click on Delete.
- To import a new or custom cover page to the drop-down list, click the **Import** button. Then, select the cover page from the file explorer and click **Open**.

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• To restore a cover page template to its default configuration, select the **Restore Defaults** button. Then, select the desired cover page(s) from the list and click **Restore Selected** as illustrated below:



- 2. In the **Sender Information** area, configure your personal information for the cover page.
 - Name By default, this field is auto-populated with the system metadata key for the full name of the user who is logged into Windows.
 - $\circ~$ Fax Number Specify the fax number from which the fax is being sent.

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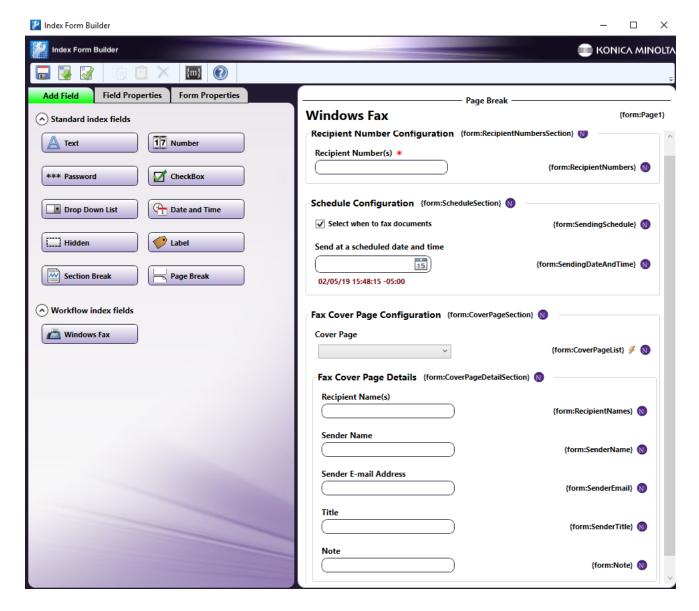
- E-mail By default, this field is auto-populated with the system metadata key for the email address of the user who is logged into Windows.
- Title Enter in the sender's job title.
- Company Specify the organization where the fax is being sent from.
- Office Location If the organization has multiple locations, specify the location using this field.
- **Department** By default, this field is auto-populated with the system metadata key for the department of the user who is logged into Windows.
- Home Phone Number Enter in the home phone number for the sender.
- Office Phone Number Enter the work phone number for the sender.
- Address Specify the physical address for the sender.
- 3. In the **Recipient Information** area, enter in the recipient's information to be listed on the cover page.
 - Name Enter in the name of the recipient.
 - Subject Specify a subject for the outgoing fax.
 - Note Add a note to the outgoing fax.

Creating a Windows Fax Connector Index Form

You can create an index form that allows you to customize your Windows Fax Connector node at the MFP. Do the following:

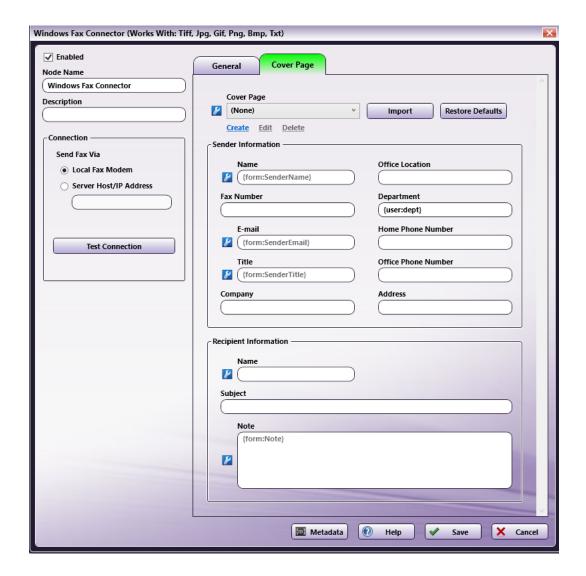
- 1. Make sure that your workflow includes a MFP Panel node and a Windows Fax Connector node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see a Windows Fax button under the Workflow index fields area.
- 3. Drag and drop the Windows Fax button to the Index Form work area. A default Windows Fax Connector Properties index form will automatically appear, as in the following illustration:

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- 4. Save and close the Index Form Builder.
- 5. The **Windows Fax Connector** node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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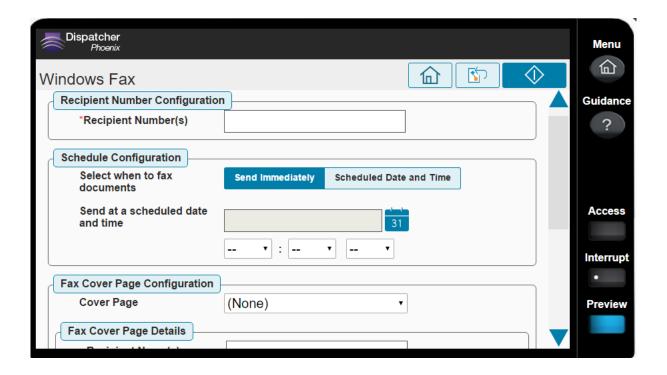
Using Windows Fax Connector Index Form with Multiple Inputs

Once you associate your Windows fax Connector node with a MFP Panel node's index form, all the information necessary to connect and route to Fax is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed Windows fax Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new Windows Fax Connector node that is not connected to an Index Form.

Windows Fax Connector Index Form on MFP

At the MFP, the Windows Fax Index Form will appear as follows:

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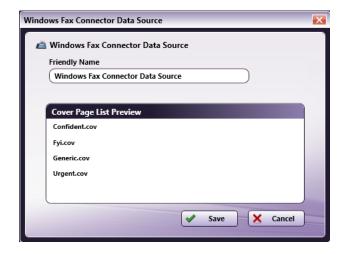


Database Query

You can also manually configure a query to retrieve cover page templates from Windows Fax.

Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Add the Windows Fax Connector Data Source from the Query list.
- 4. The Windows Fax Connect Data Source Configuration window appears as in the following illustration:



5. Click **Save**. Then, save and close the **Index Form Builder Tool**.

Workshare Connector

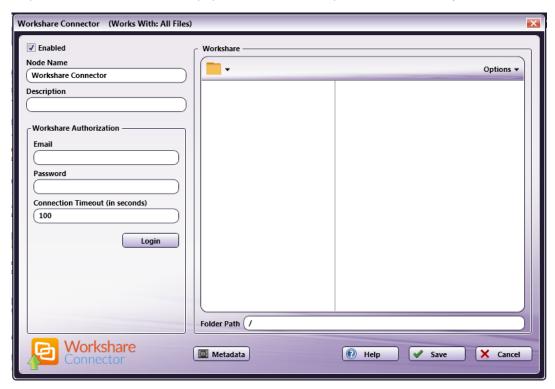
Konica Minolta 1190 / 1597



The Workshare Connector node allows you to distribute documents to Workshare, a file sharing and collaboration application. Documents can be sent to Workshare via an automated workflow, or you can access Workshare directly at the MFP panel.

Note: To use this Connector, you must have an account with Workshare.

To open the Workshare Connector node's properties window, add an output node for Workshare to your workflow and double-click on it.



- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the Workshare Connector node.
- In the **Description** field, enter a description for the Workshare Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Configuring the Workshare Connector

To configure the Workshare Connector, you must first receive an authorization token from Workshare to connect to your account; this is done by entering your Workshare credentials in the node properties window.

Connecting To Workshare

To begin, you must first enter Workshare credentials. Do the following:

1. In the **Workshare Authorization** area's **Email** and **Password** fields, enter your Workshare credentials (the email address used when setting up the account and your Workshare password). If your authorization request is successful and a token has been received from Workshare, you do not need to re-enter credentials again to perform folder operations, such as folder browsing or creating new folders, until the token is no longer valid (e.g., it has expired).

When creating an automated workflow (e.g., uploading files from Input Folder to Workshare automatically), you must log into Workshare at least once from the Workshare node properties window in order to receive a valid token from Workshare.

2. Change the seconds allotted for the time without communication (after the initial connection to the server) before a timeout occurs using the **Connection Timeout** field, if necessary. The default timeout value is 100 seconds.

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3. When you are done, select the **Login** button. Once authorization is successful, a new **Clear Session** button will appear, as in the following illustration:



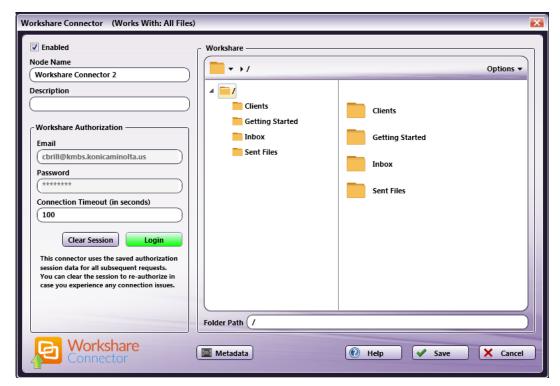
The Clear Session button can be used when the authorization data is no longer valid. In this case, do the following:

- 1. Select the Clear Session button.
- 2. Enter Workshare credentials again using the Email and Password fields.
- 3. Select the **Login** button when you are done.

Selecting A Folder

Once connected, the right hand side of the Workshare node properties window displays a tree-view of your folders, sub-folders, and files in Workshare. You can use this area to browse through the folder structure and choose a folder to store your documents in.

See the following illustration for an example:



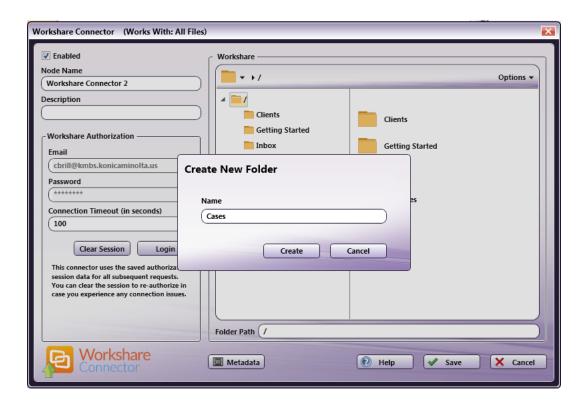
Sending Documents To A New Folder

You can also choose to create a new folder in Workshare to send documents to. Do one of the following:

• Select the New folder option from the Options drop-down menu or press Ctrl + Shift + N.

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In the Create New Folder window that appears, enter the name for the new folder in the **Name** field; then select the **Create** button. The newly created folder will now appear in the Folder view. In the following illustration, a new folder called "Cases" is being created:



- Enter a new folder name in the Folder Path field.
- Use metadata to specify a folder path at run time.

For example, you could use zonal OCR to extract client names from incoming documents and then use that OCR metadata in the Folder Path field. In this case, a folder name with the client name will be created in Workshare and documents will be automatically uploaded to that new folder at run time.

Note: You cannot create a folder within a folder that does not already exist. For example, you cannot use two different metadata variables to create a folder within a folder (e.g., {bates:Counter}/{file:name}).

To use metadata, do the following:

- 1. Select the Metadata button to open up the Metadata Browser window.
- 2. On the Metadata Browser window, select the metadata variable you are interested in; then drag-drop it to the Folder Path field.

You may have to manually add the metadata's page number to the variable. For example: {ocr:zone.Name[1]} would find the metadata on the 1st page. Or, you could add empty brackets (e.g., {ocr:zone.Name[]}) to find the first document-level occurrence of the metadata.

3. Select the **Close** button on the Metadata Browser window.

File Name Restrictions

The following restrictions apply to file names:

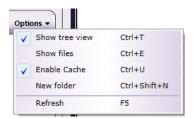
- File names cannot start with a space or end with a space.
- You cannot start a file name with two period characters (..).
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? *

View Options

You can adjust the default view of your Workshare folders in the node properties window by using the Options button on the top right hand side of the window. Do the following:

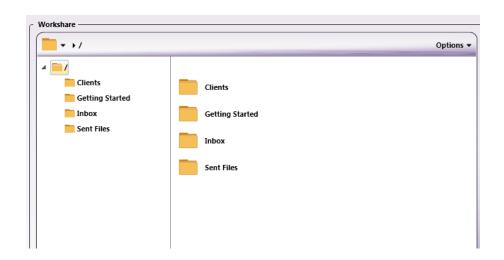
• Click on the **Options** button. The following drop-down menu will appear:

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To turn off the default view, uncheck the Show tree view option or press Ctrl + T.
 See the following illustrations for comparison on the different folder views available:

Tree View ON



Tree View OFF



- To hide the files stored in Workshare folders, uncheck the ${f Show}$ files option or press ${f Ctrl}$ + ${f E}$.
- By default, the **Enable Cache** option is enabled, allowing the Workshare Connector to cache folders for 30 minutes before requesting new data from Workshare. If you disable this option, Workshare will be queried each time an operation is performed (i.e., selecting a folder at the MFP), which may result in slower performance.
- To refresh the current view with the most up-to-date folders/files, select the Refresh option or press F5.

Creating a Workshare Connector Index Form

You can create an index form that allows you to log into Workshare at the MFP (with different accounts) and upload scanned documents to Workshare. Do the following:

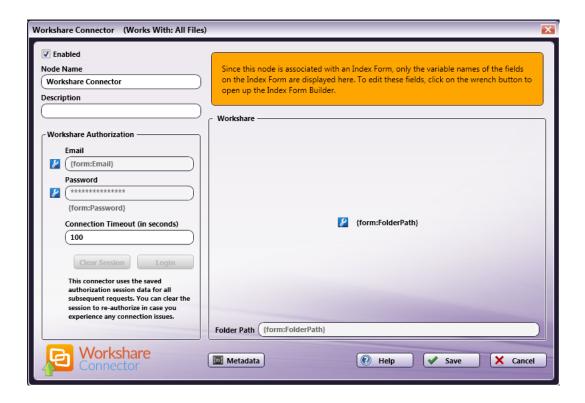
Konica Minolta 1194 / 1597

- 1. Make sure that your workflow includes a **MFP Panel node** and **Workshare Connector** node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see a Workshare Connector button under the Workflow Index Fields area.
- 3. Drag and drop the **Workshare Connector** button to the Index Form work area. A Scan to Workshare index form will automatically appear, as in the following illustration:



- 4. Save and close the Index Form Builder.
- 5. The Workshare Connector node properties window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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Using Workshare Connector Index Form With Multiple Inputs

Once you associate your Workshare Connector node with a MFP Panel node's index form, all the information necessary to connect and route to Workshare is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed Workshare Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new Workshare node that is not connected to an Index Form.

Workshare Index Form On MFP

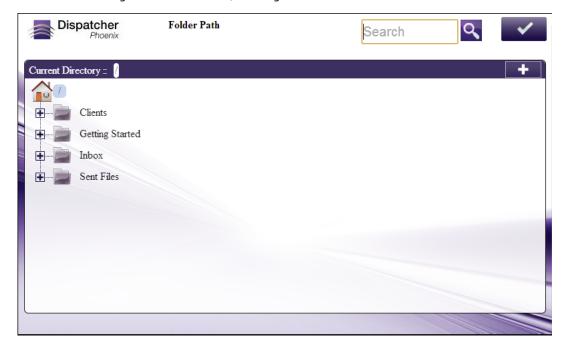
At the MFP, the Workshare Index Form will be separated into two separate screens, as follows (if login is required):

1st Screen: Workshare Login



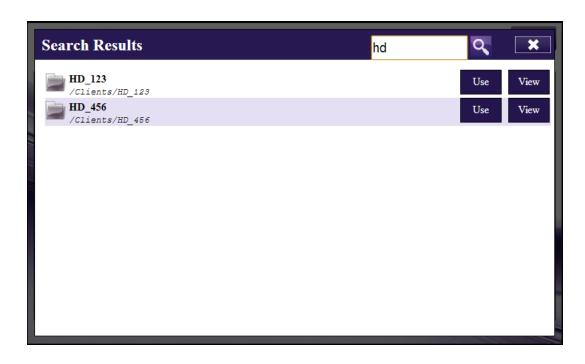
Konica Minolta 1196 / 1597

2nd screen: Choosing A Workshare Folder / Creating a new Workshare Folder



A **Search** field is provided for you to use to narrow the list of folders. This field features type-ahead functionality to help you quickly filter the folders displayed on the screen. You can begin entering characters into the field and the folders will be filtered accordingly. The search operation will be conducted on any folders and sub-folders within the root directory.

- A wildcard asterisk (*) can be used to represent more characters in a string of characters. For example, if entering inv* in the Search field, the folder results would display any folders that *begin* with those three letters (e.g., inv01, inv02, invoice, etc.). Or, if entering *inv in the Search field, the folder results would display any folders that *end* with those three letters (e.g., 01inv, 02inv, etc.)
- A wildcard question mark (?) can be used to represent an arbitrary character. For example, if entering INV0? in the Search field, the folder results would display INV01, INV02, INV03, etc.



Once the folder list is filtered per your search, you can do the following:

- Tap on the Use button to select that particular folder.
- Tap on the ${\bf View}$ button to return to a directory structure view of that particular folder.

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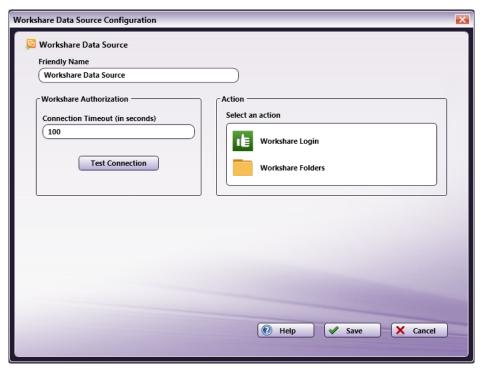
- Release the filter by tapping on the **X** button next to the Search field.
- Tap on the **Search** icon next to the field to submit the search criteria again.

Database Browsing - Workshare Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from Workshare.

Using the Index Form Builder, do the following:

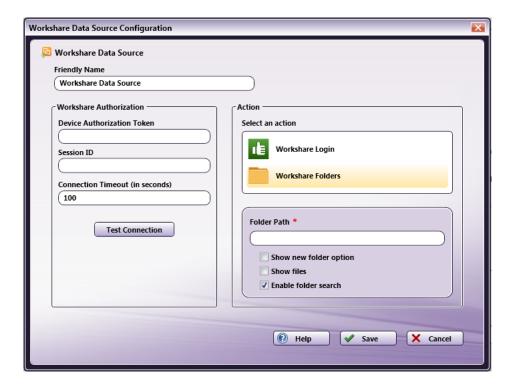
- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose Workshare Data Source from the Query drop-down list.
- 4. The Workshare Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Workshare.



Do the following:

- In the Friendly Name field, enter an identifying name for the Workshare data source configuration.
- In the Action area, you can choose what kind of action to perform on the Workshare data source. Options include:
- Workshare Login Once you click on this option, you will see Email and Password fields appear under the Workshare Authorization area. This option is designed to validate the login credentials that are entered at the MFP (email and password) against the Workshare data source. This action returns the following records:
- [result] The result of the login: true or false
- [message] Text regarding a successful or unsuccessful login.
- **Get Workshare Folders** Use this action to display a list of folders within a specific Workshare Folder Path. When you select the Get Workshare Folders item, new fields will appear for configuration, as in the following illustration:

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- Folder Path Enter the name of the Workshare root folder that you want displayed at the MFP panel.
- Show new folder option Check this option to allow the user to create a new Workshare folder at the MFP.
- Show files Check this option to display files in Workshare folders at the MFP.
- Enable folder search Check this option to display a Search field that can be used to filter the list of Workshare folders displayed on the panel. Note that the Search field includes type ahead functionality. This option is enabled by default.
- You can select the **Test Connection** button to make sure that you are connected properly to Workshare.

Worldox Connector



The Worldox Connector node allows you to scan and index documents and other data into the Worldox® Document Management System by World Software® Corporation. Documents can be sent to Worldox via an automated workflow, or you can log into Worldox and specify Worldox Profile Groups and Profile Fields before scanning your documents into Worldox directly at the MFP panel.

Important! In order to use the Worldox Connector, you must be running a 32-bit version of Dispatcher Phoenix (on a 32-bit or 64-bit system).

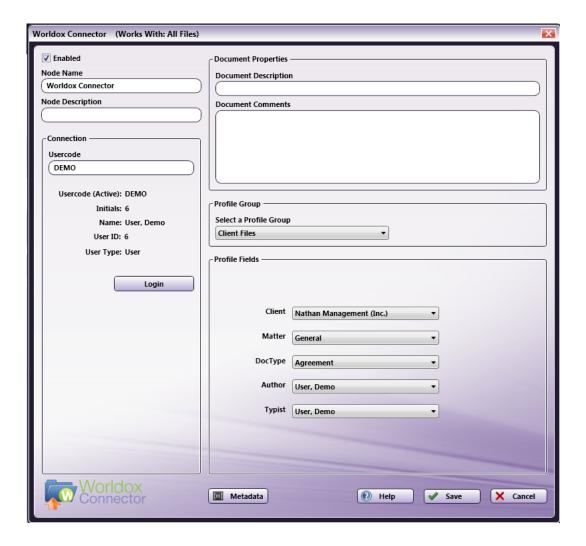
Other requirements include:

- Supported Versions: Worldox GX2 and GX3. Note that Worldox GX2 is supported via the Worldox GX3 Bridge System, which is available free of charge to Worldox GX2 customers with active maintenance. For more information on the Worldox GX3 Bridge, email Worldox support at support@worldox.com.
- Operating System: Windows 10 or higher

BEFORE STARTING: Before using the Worldox Connector node, you must configure Dispatcher Phoenix to use Worldox. Choose the **Options** item from the **Tools** menu pull-down list on the main application screen to access the Worldox Configuration window.

To open the Worldox Connector node's properties window, add an output node for Worldox to your workflow and double-click on it.

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- Check the **Enabled** box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name for the Worldox Connector node.
- In the **Description** field, enter a description for the Worldox Connector node. Although this is not required, it can be helpful to distinguish multiple destination nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Connecting to Worldox

To begin, you must first connect to Worldox. Do the following:

- In the **Connection area's Usercode** field, enter the Worldox User Code. The Profile Groups and Profile Fields that are available to you are set by the User Code that is entered.
- Select the **Login** button.

If Log in was successful, you will see details about the logged-in user, such as the user's initials, name, user type (User or Manager), unique user ID, etc., as in the following illustration:

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Note: Please check with your Worldox Administrator if you do not remember your User Code.

Document Properties

Specify Document Properties for the scanned document:

• **Document Description** - Enter a document name/description for the document.

Note: In the Worldox Client, a unique ID is automatically assigned to each document, and the Description field is typically used to store the file name. To integrate the Dispatcher Phoenix file name into Worldox, you can use the File Level variable of {file:name} in the Document Description field.

• Document Comments - Enter any comments that you want included with the document in Worldox.

Note: Although available as a feature in Worldox, you cannot specify security settings for your files using this connector.

You can also use metadata variables in these fields. Click on the **Metadata** button to open up the Metadata Browser window and drag-and-drop the metadata that you want to use to populate these fields in Worldox.

Profile Group

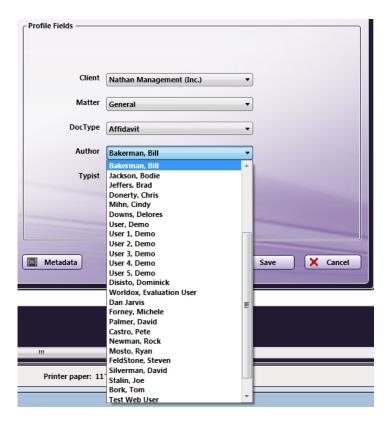
Worldox organizes its documents via Profile Groups, which contain unique set of fields describing the documents that belong to it. For example, one Profile Group may be designated for administrative documents and forms while another Profile Group is for documents associated with litigation.



Only those Profile Groups available to the specific logged-in user will appear in the Select a Profile Group drop-down list.

Select a **Profile Group** from the drop-down list. At that point, the Profile Fields associated with that Profile Group will appear below in the Profile Fields area.

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Profile Fields

To further organize your documents in Worldox, you can specify information using Profile Fields, which are key document attributes. Each document in Worldox will have profile fields associated with it. Worldox Profile Fields include basic document information, such as Client, Matter, etc. The Profile Fields and profile data that are available to you depend on the Profile Group that you selected.

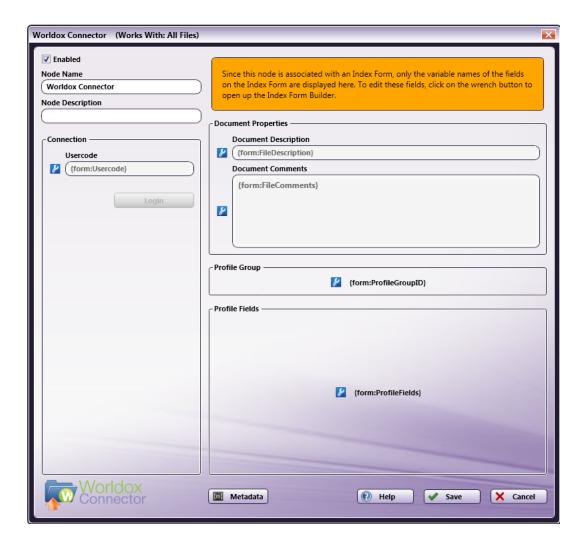
Select profile information using the **Profile Fields** drop-down lists.

The Profile Fields are linked, meaning the data associated with other Profile Fields may depend on a Profile Field that has already been selected (e.g., "Matter" data that is listed is linked to the "Client" that has already been selected).

Using With Index Form

When using the Worldox Connector node on an Index Form, the window will be automatically populated with the variable names of the fields on the Index Form. Although you cannot edit the fields on this window, you can click on the wrench tool button to go to that section or field in the Index Form Builder. See the following illustration:

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Using Worldox Connector Index Form With Multiple Inputs

Once you associate your Worldox Connector node with a MFP Panel node's index form, all the information necessary to connect and route to Worldox is entered at the MFP. Because of this, you cannot connect any other types of collection nodes (Input Folder, MFP User Box, etc.) to that indexed Worldox Connector node in your workflow. In this case, if you need to add other collection nodes to your workflow, you must add a new Worldox node that is not connected to an index form.

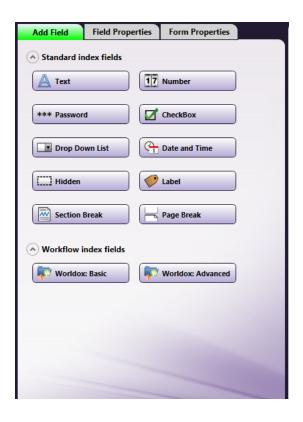
Creating A Worldox Index Form

You can create an index form that allows you to upload scanned documents to Worldox at the MFP. Do the following:

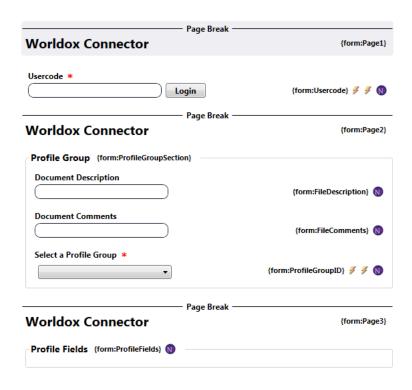
- 1. Make sure that your workflow includes a MFP Panel node and Worldox Connector node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see two Worldox Connector buttons under the Workflow Index Fields area:
 - Worldox: Basic Creates a Worldox Index Form for the MFP panel that allows you to log into Worldox, choose a Profile Group for your scanned documents, and enter Profile indexing information before scanning to Worldox.
 - Worldox: Advanced Creates a Worldox Index Form for the MFP panel that displays Worldox features, such as "Direct Access," "Quick Profiles," "Bookmarks," "Favorite Matters," and "Workspaces," for you to choose from.

See the following illustration for an example:

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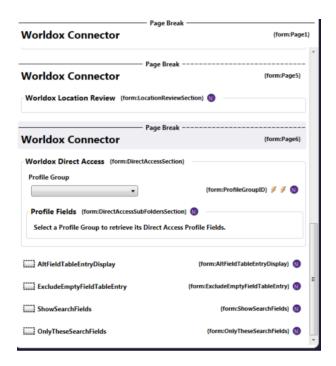


- 3. Drag and drop the appropriate Worldox Connector button to the Index Form work area.
- 4. If the Worldox Connector node has already been configured, an index form with prepopulated fields will appear; otherwise, an index form with blank fields will appear. The following illustration is an example of a Basic Worldox Index Form:



- 5. You can assign default values to the Usercode, Document Description, and Document Comments field.
- 6. Both the Basic and Advanced Index Forms have hidden fields that you can modify, if appropriate. See the following illustration:

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- **AltFieldTableEntryDisplay** If the default value is set to False, Profile Field information on the MFP panel is displayed as <code> :: <description> (e.g., "0043 : Smith & Co). If the default value is set to True, Profile Field information on the MFP panel is displayed as <description> :: <code> (e.g., Smith & Co : 0043). The default value is False.
- ExcludeEmptyFieldTableEntry If the default value is set to True, any Profile Field entries without a description are not displayed. The default value is False.
- ShowSearchFields If the default value is set to True, Search fields are displayed above all Profile Fields. The default value is False.
- OnlyTheseSearchFields If the ShowSearchFields hidden field is set to True, you can use the OnlyTheseSearchFields hidden field to
 specify which fields to display a Search field for. For example, to only add a Search field to the Client Profile Field, you would specify 'Client'
 in the Default Value field. Or, to have both Client and Matter Profile Fields to have search fields, you would specify 'Client, Matter' in the
 Default Value field.

Note: The Basic Worldox Index Form only lists the AltFieldTableEntryDisplay and ExcludeEmptyFieldTableEntry fields. The Advanced Worldox Index Form includes all of them.

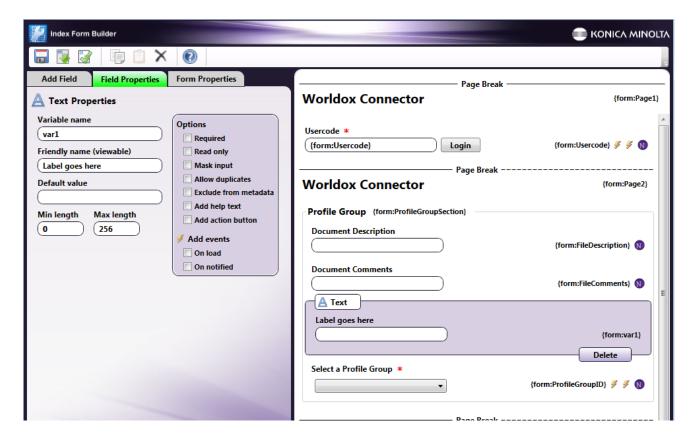
Adding Search Fields To The Index Form

To speed up your indexing process, you can add Search fields to the Index Form to filter Profile Data that appears in specific Profile Fields. For example, you can add a "Client" Search field that can be used to filter the list of clients that appear in the Clients Profile Field drop-down list.

To set up a Search field to filter Profile Data that is listed in the first Profile Field, do the following:

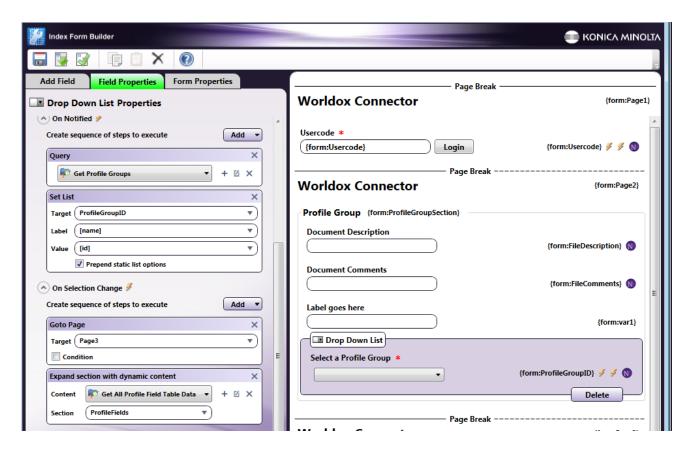
 $1. \ \mathsf{Add} \ \mathsf{a} \ \mathsf{\textbf{Text}} \ \mathsf{field} \ \mathsf{to} \ \mathsf{the} \ \mathsf{Profile} \ \mathsf{Group} \ \mathsf{section} \ \mathsf{of} \ \mathsf{the} \ \mathsf{Index} \ \mathsf{Form, as} \ \mathsf{in} \ \mathsf{the} \ \mathsf{following} \ \mathsf{illustration} :$

Konica Minolta 1205 / 1597

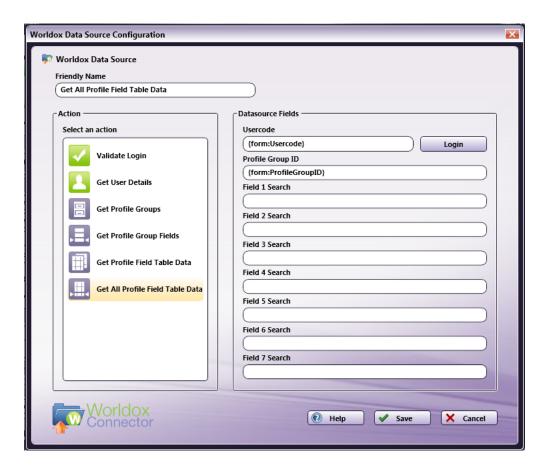


- 2. For the newly added Text field, do the following:
 - Enter a name that will appear above the field on the MFP panel in the Friendly name field (e.g., Client).
 - Enter "Field1Search" in the Variable name field (since you are interested in filtering results that appear in the first Profile Field).
- 3. Select the Select a Profile Group drop-down list in the work area of the Index Form Builder.
- 4. Edit the Expand section with dynamic content Get All Profile Field Table Data data source configuration (circled in red in the following illustration):

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The Worldox Data Source Configuration window appears, as in the following illustration:



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5. Enter {form:Field1Search} in the **Field 1 Search** field to reference the variable name of the newly added Text field; then select the **Save** button. This allows Worldox to display filtered results in the first Profile Field, based on what was entered in the Search field on the MFP.

Note: If you want to create a Search field for another Profile Field, change the variable name of the Text field accordingly (e.g., Field4Search); in the Worldox Data Source Configuration window, add a metadata reference in the correct Field Search field (e.g., Enter {form:Field4Search} in the Field 4 Search field).

Basic Worldox Index Form On MFP

At the MFP, the Basic Worldox Index Form will be separated into three separate screens, as follows:

1. Worldox Log In Screen. Log into the Worldox Server on the following screen:



2. **Worldox Log In Screen**. Enter a description and comments for the scanned document; then select a Worldox Profile Group. See the following illustration:

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3. Worldox Indexing Screen. Index your scanned document using Worldox Profile fields. See the following illustration:

Konica Minolta 1209 / 1597

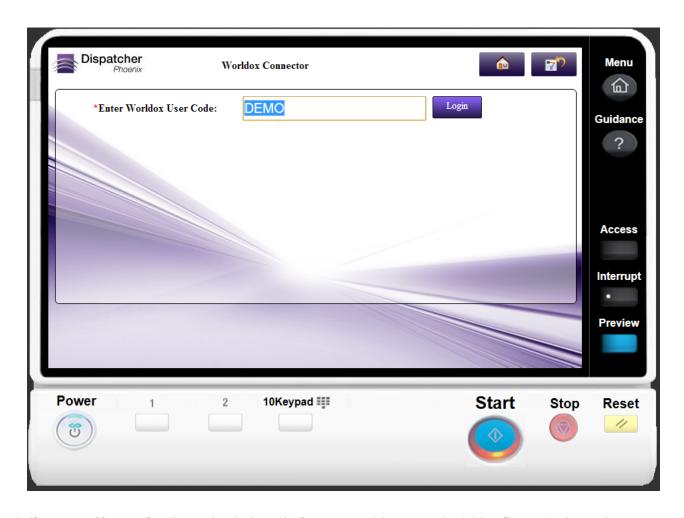


Advanced Worldox Index Form On MFP

At the MFP, the Advanced Worldox Index Form will be separated into the following screens, as follows:

 $1. \ \textbf{Worldox Log In Screen}. \ Log \ into \ the \ Worldox \ Server \ on \ the \ following \ screen:$

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2. **Choose a Worldox Location**. Choose a location in Worldox for your scanned documents, using Quick Profiles, Bookmarks, Favorite Matters, Workspaces, and Direct Access to Profile Groups. See the following illustration:



3. Choose the Type of Worldox Location. Choose to view Public, Private, or both Public and Private locations in Worldox. This screen also includes a Search field to filter your location list. See the following illustration:

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4. Choose the Location. Choose the Worldox location on this screen. A Search field is included to filter the list of locations displayed in the drop-down menu. See the following illustration:



5. **Review / Modify Index Fields & Scan**. The last screen displays the index fields that are already set up within Worldox for the Location that you selected. You can modify fields as appropriate and then scan your document(s) into Worldox. See the following illustration:

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rldox Location Review	Client Files (Quick Profile) Path: Client Files\ <client>\<matter></matter></client>	
*Client	_	
*Matter	•	
*ДосТуре	-	
*Author	DEMO :: User, Demo	
*Typist	DEMO :: User, Demo	

Worldox Index Form On MFP - Using Search Fields

When a Search field has been added to the Worldox Index Form, the MFP user will see the search field on the second "Profile Group" screen.

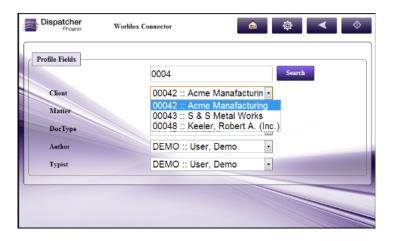
In the following example, a "Client" search field has been added, allowing the user to filter Profile Data based on a specific Client Code.



The MFP user enters "0004" in the **Client** field to filter the list of Clients that are retrieved from the Worldox Server; then the user selects the "Clients" **Profile Group** from the drop-down list.

On the next page, the initial search criteria will be displayed and the Client drop-down menu will be filtered accordingly, as in the following illustration:

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Database Browsing - Worldox Configuration

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from Worldox. Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an On Load event for the field; then add a Query.
- 3. Choose Worldox Data Source from the Query drop-down list.
- 4. The Worldox Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from Worldox.



Do the following:

- In the **Friendly Name** field, enter an identifying name for the Worldox data source configuration.
- In the **Datasource Fields** area, enter the Worldox User Code that is necessary to connect to Worldox.
- $\circ~$ Select the Login button to make sure that you are connected properly to Worldox.
- In the **Action** area, choose what kind of action to perform on the Worldox data source. Options include:
 - Validate login Validates the login credentials that are entered at the MFP (user code) against the Worldox data source. This action returns the following records:
 - [result] The result of the login: true or false

Konica Minolta 1214 / 1597

- [message] Text regarding a successful or unsuccessful login.
- Get User Details Validates the user code and returns specific details about the logged-in user (User initials, full name, user ID, user type, etc.) You can choose to return one of the following information from Worldox:
 - [Number] The ID of the logged-in User
 - [Ismanager] The User's type (Manager or User)
 - [Usercode] The User Code of the logged-in User
 - [Initials] The User's initials
 - [Name] The User's full name
- Get Profile Groups Retrieves information about the Profile Groups that are available to the Worldox User within Worldox. You can
 choose to return the following information from Worldox:
 - [ID] The ID numbers of the Profile Group in Worldox
 - [netmap] The network mapping paths of the Profile Groups in Worldox
 - [basepath] The folder paths of the Profile Groups in Worldox
 - [name] The names of the Profile Groups in Worldox
- **Get Profile Group Fields** Retrieves Profile Fields (Client, Matter, etc.) for the User Code and Profile Group ID that is specified. When you select this item, an empty field appears in which you can enter the appropriate Profile Group ID. See the following illustration for an example:



- **Get Profile Field Table Data** Retrieves entries for a specific Profile Field within a Profile Group. When you select this item, empty fields appear in which you can enter the appropriate Profile Group ID, Profile Field number, and (if applicable) the Parent Field number. You can choose to return the following information from Worldox:
 - [code] The Worldox code for the Profile Field table entries
 - [description] The name of the Profile Field table entries

See the following illustration for an example:

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• **Get All Profile Field Table Data** – Retrieves ALL Profile Fields and their associated entries based on the Profile Group ID that has been chosen. When you select this item, an empty field appears in which you can enter the appropriate Profile Group ID.

In addition, this area allows you to specify that search criteria can be entered at the MFP panel to filter the list of Profile Field table entries retrieved, using the **Field 1 Search-Field 7 Search** fields, as in the following illustration:



Because this retrieves dynamic content, this action is used with the Expand Section trigger.

- Get Location Types Retrieves all types of Worldox Locations (Direct Access, Quick Profiles, Bookmarks, Favorite Matters, Workspaces) based on user log in.
- **Get Locations** Retrieves the Location based on user log in, type of Location that was chosen, the Location Ownership that was chosen, and search field results, as in the following illustration:

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 Get Location Details - Retrieves Details of the Location based on user log in and what was chosen at the MFP panel for Worldox Location, type of Location, ownership, and search field results, as in the following illustration:



• **Get SubFolder Fields** -Retrieves Field tables that are marked to be subdirectories in Worldox, for the Profile Group that was selected at the MFP. This is used for Direct Access. See the following illustration:

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AccurioPro Flux Connector



The AccurioPro Flux Connector Node is no longer actively supported, but current licenses remain fully-functional.

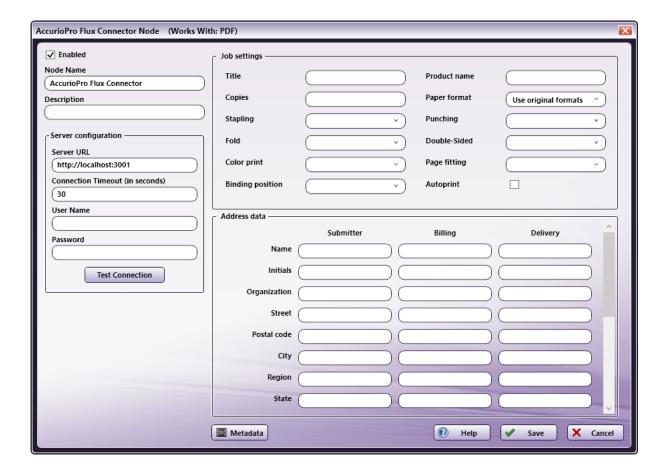
Use the **AccurioPro Flux Connector Node** to send the processed output of a workflow to an AccurioPro Flux server. Specify the job settings as well as address data to use for the job. The AccurioPro Flux Connector node only supports PDF files.

Upload processed PDF files from a workflow to AccurioPro Flux Server to utilize its configured products and print settings. Print jobs processed by this node can then be uploaded to the AccurioPro Flux Server the same as any other incoming print jobs are.

Using the AccurioPro Flux Connector Node

Add the AccurioPro Flux Connector Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the AccurioPro Flux Connector Node's window:

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- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the AccurioPro Flux Connector Node.
- In the **Description** field, enter a description for the AccurioPro Flux Connector. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- Click on the Metadata button and the Metadata Browser window opens. Use the screen to drag-and-drop variable names from the Select Metadata key area to the appropriate text fields.
- Select the Save button to apply the settings. Select the Cancel button to exit the window without saving any changes.
- Select the **Help** button to access online help.

Server Configuration Settings

In the Server configuration area, specify how to the node will connect to the Flux server.



• Server URL: Enter the HTTP URL for the Flux server. This must be in the form http://host:port

The default Server URL displays as http://localhost:3001

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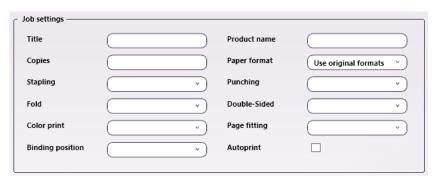
- Connection Timeout (in seconds): The maximum number of seconds to wait for a server response before displaying a connection error.
- **User Name/Password**: Specify a Flux server user account to use for the submission. This is required for testing the connection and submitting jobs.

Note: Metadata may not be entered in any of the above fields.

• Test Connection: Click on this button to test the connection to the specified AccurioPro Flux server. A pop-up message provides details about the Test results.

Job Settings

In the Job Settings area, specify the settings for jobs submitted to the AccurioPro Flux server. If a field is left empty, the default value is used by Flux. To use custom (manual) service options, enter the appropriate values to support these.

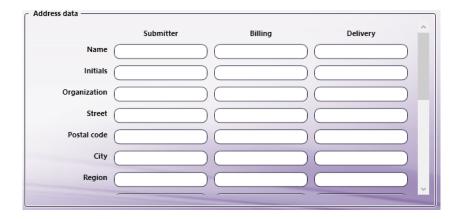


- · Title: The title to assign to the job.
- Product name: The product to use for the job. A product with this name must exist in the Flux configuration. If it does not, All Settings is used.
- Copies: The number of copies.
- Paper format: The paper format to use for the job. A range of default paper formats as well as the use original formats option are available.
 Enter the value that matches the PDF paper format. This setting is ignored if a product is specified.
- Stapling: The stapling setting to use. All default stapling options supported by Flux are available.
- Punching: The punching setting to use. All default punching options supported by Flux are available.
- Fold: The fold setting to use. All default fold options supported by Flux are available.
- Double-Sided: The duplex setting to use. Left, Off, and Top are supported.
- Color print: The color print setting to use. Color and Black & White are supported.
- Page fitting: The page fitting setting to use. Bottom Left, Center, Center & Rotate, Scale & Center, and Scale, Center & Rotate are supported.
- Binding position: The binding position setting to use. Left, Top, Right, and Bottom are supported.
- Autoprint: To automatically print the job when it arrives at the Flux Server, select the checkbox.

Address data

Specify the address data to use for the job. Every address field available in Flux is listed here. Enter the appropriate contents for each field or use Metadata placeholders.

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AccurioPro Conductor Connector



The AccurioPro Conductor Connector Node is no longer actively supported, but current licenses remain fully-functional.

The **AccurioPro Conductor Connector Node** is used to submit the job (JDF+PDF) to an AccurioPro Conductor Hot Folder. Documents are sent to an AccurioPro Conductor Hot Folder via an automated workflow then submitted to AccurioPro Conductor via the Hot Folder.

This node handles input in one of two ways. If the JDF file path is specified in the metadata of the input file, then the JDF file is submitted. If the file path for the job ticket file is NOT specified in the metadata or if the job ticket is in some other format other than JDF (e.g. JSON/XML), a JDF file is created applying the JDF default values. Once the JDF is created, it is updated with the metadata job information and then submitted.

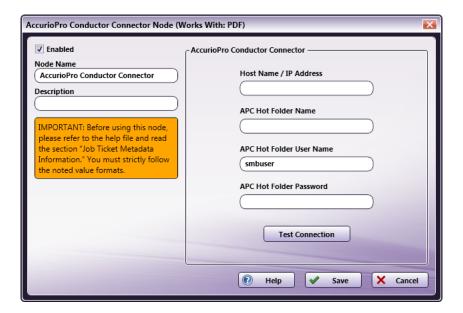
Note: This Help file contains detailed information about supported Job Ticket Metadata and the JDF XPaths and Value Ranges. Refer to **Job Ticket Metadata**. When launched, the Metadata Browser window displays the pre-defined Job Ticket Metadata, the system-defined variables (such as Date, File, System and User info), and the metadata values from the active node.

Using the AccurioPro Conductor Connector Node

Note: To configure the AccurioPro Conductor Connector Node, a Hot Folder must be created using the AccurioPro Conductor before configuring this node. For complete details about this, see the **Hot Folders** chapter of the AccurioPro Conductor help file which can be launched when the APC application is open.

Add the AccurioPro Conductor Connector Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the AccurioPro Conductor Connector Node's window:

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Specify the AccurioPro Conductor Connector's Hot Folder details in this window.

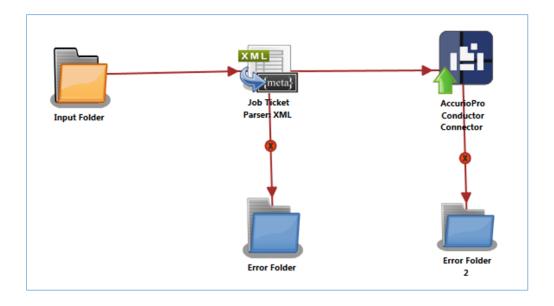
- Select the **Enabled** checkbox so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the Node Name field, enter a meaningful name for the AccurioPro Conductor Connector Node.
- In the **Description** field, enter a description for the AccurioPro Conductor Connector Node. This is not required, but can be helpful with multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the AccurioPro Conductor Connector panel, enter the following information to access the AccurioPro Conductor Hot Folder:
 - Host Name/IP Address: Enter either the host name (i.e., mysubdomain.domain.com) or the IP address (i.e., 10.10.220.110) of the AccurioPro Conductor Server.
 - APC Hot Folder Name: The Hot Folder is stored on the AccurioPro Conductor server. Enter the name of the Hot Folder to which the zip files need to be uploaded.
 - APC Hot Folder User Name: Enter the login credentials for AccurioPro Conductor Server. The default user name displays as smbuser.
 - APC Hot Folder Password: Enter the password used to access the user account of the AccurioPro Conductor Server.
- When finished, select the **Test Connection** button to make sure the connection to the AccurioPro Conductor Server functions as expected.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Sample of an AccurioPro Conductor Connector Workflow

The purpose of this workflow is to extract job ticket information from the Job Ticket file and submit it to AccurioPro Conductor.

A detailed explanation of each node of the workflow below follows:

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Input Folder Node: Configure the Input Folder to collect XML job tickets and forward them to the Job Ticket Parser: XML Node. The forwarded XML job ticket files contain the job ticket attribute information. Below is a sample job ticket that contains the chapter information:

```
<Ticket>
        <Name>Sample XML Job</Name>
        <Quantity>5</Quantity>
        <Media>
                <Color>Yellow</Color>
        </Media>
        <Src>C:\Temp\Testfile.pdf</Src>
        <File>file</File>
        <PageException>
                <PerPageSetting>
                        <PageRange>1-5</PageRange>
                        <Media>
                        <PaperName>A4</PaperName>
                        </Media>
                </PerPageSetting>
        </PageException>
</Ticket>
```

Job Ticket Parser: XML Node: If the document is formatted as XML, the XML information is converted to job ticket metadata and sent forward in the workflow. If a document is not formatted as XML, that document is moved to the **Error Folder**.

Use this process to map an XML job ticket:

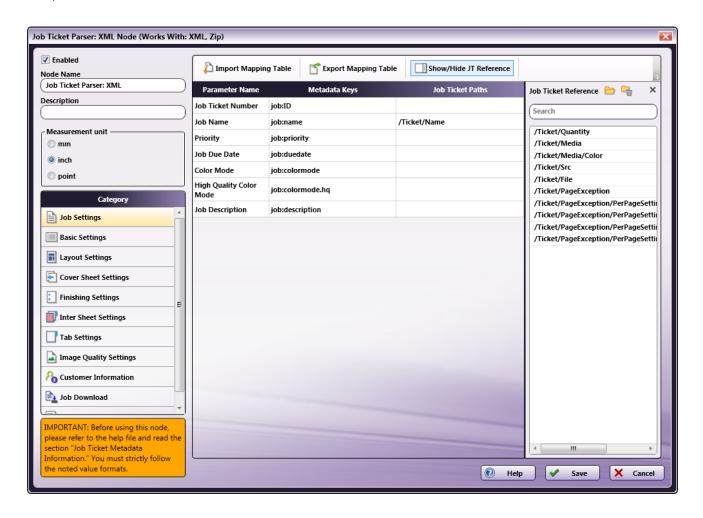
- 1. Open a text editor then copy the sample XML code noted is the sample job ticket above.
- 2. The Source Path **<Src>** noted in the sample job ticket needs to be changed so that the path is valid.
- 3. Save locally as $XML_Apcc_Connector.XML$.
- ${\it 4. Double-click on the Job Ticket Parser: XML Node. The settings screen opens.}\\$
- 5. In the left panel, set the following values:
 - Enabled checkbox: Select to enable the node to accept jobs
 - Node Name: Assign a name value to the node in the text field
 - Measurement unit: Select the radio button that corresponds to the measurement unit required for the node.
- 6. In the Job Ticket Reference panel (far-right), locate the Open icon:



- 7. Click the icon. On the screen that opens, navigate to and select the file saved in Step 3 above (XML_Apcc_Connector.XML).
- 8. When the file opens, its contents (or XPaths) display in the Job Ticket Reference panel (far-right).

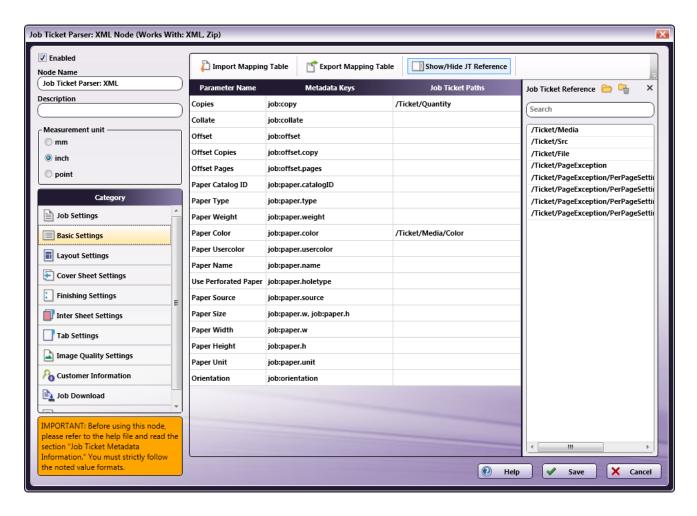
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9. In the Category panel (far-left), click on **Job Settings**. The **Parameter Name**, **Metadata Keys**, and **Job Ticket Paths** columns display in the main panel:



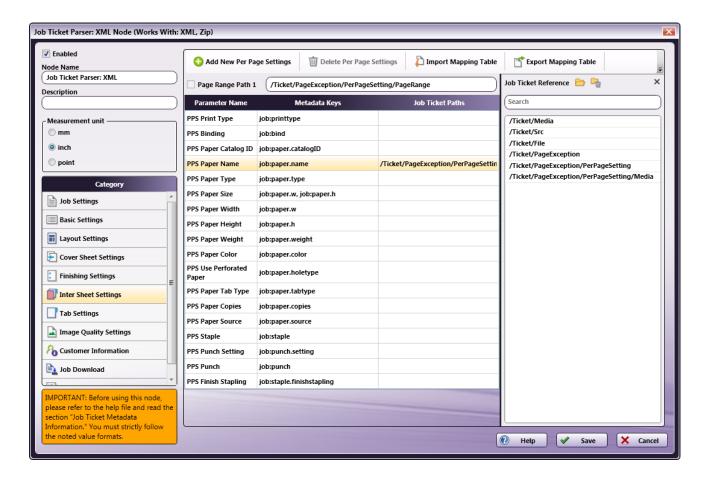
- 10. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 11. Drag-and-drop /Ticket/Name to the Job Ticket Paths cell of the Job Name row.
- 12. In the Category panel (far-left), click on Basic Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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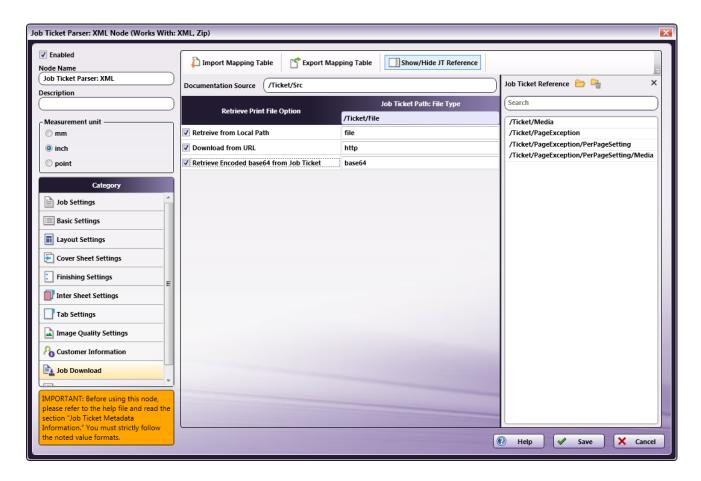
- 13. Values from the **Job Ticket Reference** panel need to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 14. Drag-and-drop /Ticket/Quantity to the Job Ticket Paths cell of the Copies row.
- 15. Drag-and-drop /Ticket/Media/Color to the Job Ticket Paths cell of the Paper Color row.
- 16. In the Category panel (far-left), click on Inter Sheet Settings. The Parameter Name, Metadata Keys, and Job Ticket Paths columns display in the main panel:

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- $17. \ \mathsf{Drag\text{-}and\text{-}drop} \ \textit{/} \textbf{Ticket/PageException/PerPageSetting/PageRange} \ \mathsf{to} \ \mathsf{the} \ \textbf{Page} \ \textbf{Range} \ \textbf{Path} \ \textbf{1} \ \mathsf{cell}.$
- 18. A value from the **Job Ticket Reference** panel needs to be moved to the **Job Tickets Paths** column, to the open cell that corresponds to the value's **Parameter Name**.
- 19. Drag-and-drop /Ticket/PageException/PerPageSetting/Media/PaperName to the Job Ticket Paths cell of the PPS Paper Name row.
- 20. Drag-and-drop /Ticket/Media/Color to the Job Ticket Paths cell of the Paper Color row.
- 21. In the Category panel (far-left), click the Job Download option. The Documentation Source and Job Ticket Path: File Type fields and the Retrieve Print File Option checkboxes display in the main panel:

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- 22. In the Retrieve from File Option column, select the checkboxes of all three options: Retrieve from Local Path, Download from URL, and Retrieve Encoded base64 from Job Ticket.
- 23. From the Job Ticket Reference panel, drag-and-drop /Ticket/Src to the Documentation Source field.
- 24. From the Job Ticket Reference panel, drag-and-drop /Ticket/File to the Job Ticket Path: File Type field.
- 25. Once these actions are completed, the screen will appear as shown in the image above.
- 26. Click **Save** to apply the changes to the node.

AccurioPro Conductor Connector Node: The AccurioPro Conductor Connector Node generates the job ticket, and then sends the PDF and job ticket info to AccurioPro Conductor. From there, the documents may be printed. If any of the metadata values noted below are invalid, then the PDF file is moved to the **Error Folder 2**.

- Copies > job:copy
- Offset Copies > job:offset.copy
- Offset Pages > job:offset.pages
- Paper Weight > job:paper.weight
- PPS Paper Weight > job:paper.weight[]
- PPS Number of Inserts > job:paper.copies[]

If any metadata value not noted in the list above is invalid, an error message is sent to the Activity log. The job, however, continues moving forward. A job ticket is generated and it and its PDF file are moved to AccurioPro Conductor.

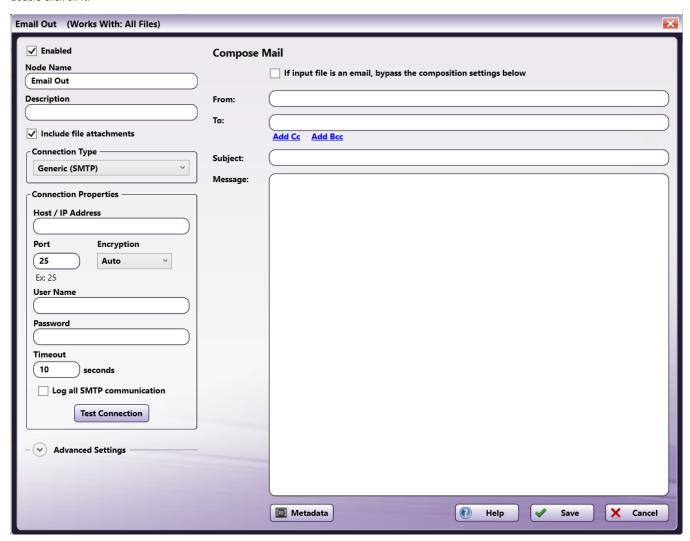
Outputs

Email Out

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Use the **Email Out** node to distribute output files via email. To open the Email Out node window, add an Email Out node to the workspace and double-click on it.



Important! When using Dispatcher Phoenix 8.7 or newer, the **Email Out** node will no longer send emails from Microsoft Exchange. For workflows with this configuration, the **Email Out** node can be replaced with a **Microsoft Exchange** node.

Important! Beginning on June 3, 2024, Google will begin to forcibly expire all third-party access to GMail accounts every 6 months. In order to ensure continued access to Google Mail in Dispatcher Phoenix, users will need to log in to **DP Web**, then remove and re-add their Google Mail accounts. If they don't, Dispatcher Phoenix workflows that use the **Email** In or Email Out nodes to access Google Mail accounts will stop working.

The following configuration options are available:

- Enabled Check the box at this field when multiple output locations exist. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be outputted and may be lost.
- Node Name Enter a meaningful name for the Email Out node.
- **Description** Enter a description for the Email Out node. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- Include file attachments To include file attachments in the email, check the box. Otherwise, leave the box blank.

Connection Type

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To specify a connection type, select one of the following options:

- Generic (SMTP) The Simple Mail Transfer Protocol that is standard for email transmission.
- Google Mail The online Google Mail (GMail) protocol.

Note: The options available in the Connection Properties section vary based on your selection here.

Connection Properties

Use this area to enter the system information for the SMTP server. If you selected **Generic (SMTP)** in the **Connection Type** area, the following fields are available:

- Host/IP Address Enter the identifying host name or IP address for the outgoing, external SMTP email server.
- Port Enter the port used by the server for SMTP communication. The default is 25.
- Encryption Use this field to specify your connection type. You have the following options:
 - Auto Select this option to automatically detect the connection type. If the connection allows STARTTLS, it uses that connection. Otherwise, it uses the default connection.
 - SSL/TLS Select this option to connect to SMTP servers that allow only SSL connections such as Google Apps and Microsoft Live. With this
 option, support is enabled for both SSL-enabled and TLS-enabled servers. If you select this option, the port number automatically changes to
 the secure SMTP port default of 465, unless the port was customized already. For configuration options with particular SMTP servers, please
 refer to their latest documentation.
 - **STARTTLS** Select this option to connect the SMTP server with STARTTLS. If you select this option, the port number automatically changes to the secure SMTP port default of 587, unless the port was customized already.
- User Name Enter the email server account user name.
- Password Enter the email server account password.
- **Timeout** Change the seconds allotted for the time without communication before a timeout occurs, if necessary. The default timeout value is 10 seconds.

Note: If multiple servers are associated with a hostname (e.g. smtp.office365.com), each server will be allowed the full timeout.

- Log all SMTP Communication Enable this option to log all SMTP communication.
- Test Connection Click this button to check if the URL and credentials that were entered are valid.

If you selected **Google Mail** in the **Connection Type** area, the following fields are available:

Account - Select the desired account from the dropdown.

Note: You must set up a Google Mail account through Dispatcher Phoenix Web before it will appear in the dropdown.

Advanced Settings

This area contains advanced settings for the Email Out node.

Filename Encoding

Use this area to customize the way email attachments' filenames are sent to the SMTP server. Use this advanced feature when an email client is incorrectly displaying attachment filenames that are sent from Dispatcher Phoenix. Select one of the following options:

- Modern Email Clients Select this option to encode filenames using the RFC2231 encoding scheme. This is the newest standard and is recommended for use with modern email clients.
- Legacy Email Clients Select this option to encode filenames using the RFC2047 encoding scheme, which uses character sets that cause the filenames to be encoded in the lowest possible size.
- Legacy Email Clients Compatibility Mode Select this option to encode filename are encoded using the RFC2047 encoding scheme, which uses base64 UTF-8 encoding for all filenames. The filenames will be largest with this option selected but compatible with the largest number of email clients.

Compose Mail

Use this area to specify your preferences for the outgoing email. You have the following options:

• If input file is an email, bypass the composition settings below - Check this box to allow the composition settings (From, To, Cc, Bcc, Subject, Message) and any email attachments to be pulled from an email file. Additionally, any header information in the email file is also sent. When an email file is detected in the Email Out node, its settings are used instead of the information provided in the composition settings fields

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and its attachments are sent. The supported email file types are: ".eml" files captured from 3rd party software and ".mbox" files generated by the SMTP In node.

- · From Enter the sender's email address.
- To Enter the recipient's email address. Separate multiple addresses with a comma, semicolon, or new line.
 - Add Cc Click this link to display a field where you can enter an email address to be "carbon copied" on the email.
 - Add Bcc Click this link to display a field where you can enter an email address to be "blind carbon copied" on the email. With this option, recipients on the Bcc list are not shown to other recipients.
- · Subject Enter a subject line for the email.
- Message Enter the message to accompany the output files.
- Metadata To browse for workflow metadata, click on this button. The Metadata Browser window appears. Using this window, you can dragand-drop variable names from the Select Metadata Key area to the appropriate open text fields. For more information, see the Using Dynamic Variables for Email Header Metadata section.
- Help Click this button to access Online Help.
- Save Click this button to keep the Email Out definition.
- Cancel Click this button to exit the window without saving any changes.

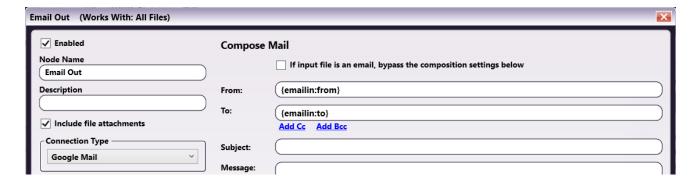
Using Dynamic Variables for Email Header Metadata

The address fields (From, To, CC, and Bcc) support the following:

• Sending to multiple email addresses using commas (,), semi-colons (;), and spaces. See the following examples:

accounting@emailhosting.com; manufacturing@emailhosting.com; sales@emailhosting.com accounting@emailhosting.com, manufacturing@emailhosting.com, sales@emailhosting.com accounting@emailhosting.com manufacturing@emailhosting.com sales@emailhosting.com

• The use of metadata. In the following example, the "To" and "From" addresses from a previous Email Parser node will be used for the new email being sent:



Note: If using other strings with the metadata in the body of the email or in the From/To/Subject fields, the first curly bracket of the non-metadata string must be escaped with another curly bracket. For example: **{fs.fullname}{0,1,1}** will result in an error. However, **{fs:fullname}{0,1,1}** is correct.

• Specifying a backup address if the metadata doesn't exist. In this case, the keywords "or", "orelse", "else", and "or-else" can be used to specify back up addresses for metadata.

With these keywords, if the metadata specified on the left side of the keyword doesn't exist, the email address specified on the right side will be used as in the following examples:

{email : accounting} else accounting@emailhosting.com

{email : accounting@emailhosting.com**, **{email : manufacturing} or manufacturing@emailhosting.com**, **{email : sales} or sales@emailhosting.com

You can combine multiple back up addresses if you wish to check multiple metadata fields as well. In these cases, the first metadata, from left to right, that is present will be used, as in the following example:

{email : accounting} or {email : account manager} or accounting@emailhosting.com

Note: The backup logic is always read from left to right. In the following example, the metadata will never be used because the static email value will be read first:

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Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix Email Out nodes. By default, Email Out uses port 25. However, this port number is configurable, so it may differ if the number has been changed. If mail fails to send, check the workflow log for the following message:

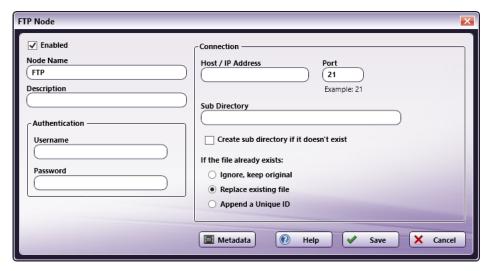
[Warning][SMTP user@mail.com]Connection failed to SMTP server mail.com:25

To allow Email Out to function properly, please consult your firewall application documentation to either stop blocking port 25 or to allow access by the workflow engine process, "blox-erl.exe."

FTP



The FTP node distributes output files to an FTP server. To open the FTP node window, add an FTP node to the workspace and double-click on it.



- Enabled Check this box when multiple output locations exist. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be outputted and may be lost.
- Node Name Enter a meaningful name to the FTP node.
- **Description** Enter a description for the FTP node. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- Authentication Use this area to enter the following information to access an account on this FTP server:
 - Username
 - Password
- Connection Enter the system information for the FTP server:
 - Host/IP Address Enter the identifying host name for this server or its IP address.
 - Port Enter the port used by the server for FTP communication (default is 21).
 - **Sub Directory** Enter the path to the desired destination directory on the FTP server. A leading forward slash is not required unless referencing the root directory on the server.
 - Create sub directory if it doesn't exist Check this box to create a new sub directory.
- If the file already exists: Specify your preference for file processing when a filename in the workflow to be exported matches a filename in the destination directory. Select one of the following options:

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- Ignore, keep original Select this option to cancel the export of the file and preserve the original file in the destination directory. This option prevents duplicate processed files.
- Replace existing file Select this option to overwrite the original file in the destination directory and replace it with the exported file.
- Append a Unique ID Select this option to append the filename of the exported file with a unique ID to distinguish it from the original file in the destination directory. This option retains both versions of a processed file.
- Metadata To browse for workflow metadata, click on this button. The Metadata Browser window appears. Using this window, you can dragand-drop variable names from the Select Metadata Key area to the appropriate open text fields.
- Help Click this button to access Online Help.
- Save Click this button to retain the FTP definition.
- Cancel Click this button to exit the window without saving any changes.

FTP Configuration

Dispatcher Phoenix supports FTP and FTP-SSL (FTPS) using SSL and TLS. Depending on the configuration of the FTP Server you may need to change the port from 21 (the default) to either 990 (the default for SSL/TLS), or to whatever port for which the FTP Server has been configured.

Dispatcher Phoenix supports SSH-FTP (SFTP), but only as an output using the SFTP Out node.



Firewall Note

Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix FTP nodes. By default, FTP uses port 21. However, this port number is configurable and, in the case of passive-mode FTP, possibly arbitrarily defined by the server, so it may differ from the default value. If FTP connections fail, check the workflow log for the following message:

Failed to connect to ftp.com:21 <ftp://ftp.com:21>

To allow FTP to function properly, please consult your firewall application documentation to either stop blocking port 21 or to allow access by the workflow engine process, "blox-erl.exe."

HL7 Connector



A key feature for the Healthcare market, this node distributes documents as industry-standard HL7 (Health Level 7) messages. Dispatcher Phoenix's support for HL7 provides the interoperability and connectivity needed for healthcare professionals to:

- · Look up patient information at the MFP.
- · Enter additional patient information at the MFP.
- Securely send scanned documents along with specified patient information as an HL7 message that can then be safely received by any Electronic Health Record (EHR) system.

The Dispatcher Phoenix HL7 Connector supports transmitting HL7 v2.x messages through a direct connection via TCP/IP using the Minimal Lower Layer Protocol (MLLP). The MLLP wrapping protocol is required to recognize the start and the end of each message.

Overview of HL7

HL7 is an international standard for transferring medical data between disparate healthcare systems. An HL7 message is comprised of one-character delimiters that separate the following message parts:

- Segments, separated by a carriage return (\r)
- Fields, separated by a vertical bar/pipe (|)
- Components, separated by a caret (^)
- Subcomponents, separated by an ampersand (&)

HL7 Message Format

See the following illustration for an example of an HL7 message transmitted from the HL7 Connector:

Konica Minolta 1232 / 1597 MSH|^~\&|Dispatcher Phoenix|Solutions Engineering Center||Facility
1|201804251135||MDM^T02|20180425113512995|P|2.3.1|
PID|1|123456|||Doe^John^A.||19790704||M|||123 Main Street^^Hartford^Connecticut^06101^US||860-123-4567

TXA|1|PR||20180424

OBX|1|ED|0123456-C^Patient's
progress^^ProgressNote.txt||^text^plain^Base64^MS4gSW5zdGFsbCBIbDcgU291cCAoMSkubXNpIG9uI
HRoZSBkZXNrdG9wDQoyLiBDb3B5IGFuZCBwYXN0ZSB0aGUgUmVjZWIZZWQvU2VudCBtZXNzYWdII

OBX|2|ED|0123456-C^Patient's progress^^^ProgressNote.txt||^text^plain^Base64^aS4=

The HL7 message includes the following segments:

GlulHRoZSBITDcgU291cCB1

Segment	Description
MSH	Message Header. Every message begins with an MSH.
TXA	Transcription Document Header. This contains the document type as well as the time/date in which the document was created.
PID	Patient Identification. This contains all the patient information provided.
OBX	Observation/Results. This contains ED (Encapsulated Data) if a file is being transmitted and TX (Text Data) if text is being transmitted. If file data is being sent, each segment will contain up to 32,768 bytes of base64 encoded files bytes. If text data is being sent, each line of the input text data will be contained in its own segment.

Message Header Segment

The Message Header includes the following fields:

Field Index	Field Name	Comment
1	Field Separator	The MSH.1 field will be \
2	Encoding Characters	The MSH.2 field will be ^~& \
3	Sending Application	The MSH.3 field will be Dispatcher Phoenix
4	Sending Facility	
5	Receiving Application	Not used
6	Receiving Facility	
7	Date/Time Of Message	Format: yyyyMMddhhmmss
8	Security	Not used
9	Message Type	The following message types are supported:
10	Message Control ID	
11	Processing ID	The following processing ID values are supported: Production - P Debugging - D Training - T
12	Version ID	The MSH.12 field shall be 2.3.1

Patient Identification Segment

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The Patient Identification includes the following fields:

Field Index	Field Name	Comment
1	Set ID - PID	
2	Patient ID	
3	Patient Identifier List	Not used
4	Alternate Patient ID	Not used
5	Patient Name	
6	Mother's Maiden Name	Not used
7	Date of Birth	Format: yyyyMMdd
8	Administrative Sex	Ambiguous - A
		• Female - F
		• Male - M
		Not Applicable - N
		• Other - O
		• Unknown - U
9	Patient Alias	Not used
10	Race	Not used
11	Patient Address	
12	County Code	Not used
13	Phone Number - Home	

Transcription Document Header Segment

The Transcription Document Header includes the following fields:

Field Index	Field Name	Comment
1	Set ID - TXA	
2	Document Type	The following document types are supported: • Consent to Treat - CT
		Consultation - CN
		Diagnostic Imaging - DI
		Discharge Summary - DS
		Emergency Department Report - ED
		HIPAA Consent - HC
		History and Physical Examination - HP
		Operative Report - OP
		Psychiatric Consultation - PC
		Psychiatric History and Physical Examination - PH
		Procedure Note - PN
		Progress Note - PR
		Referral / Order - RO
		Surgical Pathology - SP
		Transfer Summary - TS
3	Type of Referenced Data	Not used

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Field Index	Field Name	Comment
4	Activity Date/Time	Format: yyyyMMdd

Observation Value Segment

The Observation Value includes the following fields:

Field Index	Field Name	Comment
1	Set ID - OBX	
2	Value Type	The following value types are used: • Encapsulated Data - ED • Text Data - TX
3	Observation Identifier	Contains document identifier, description, and file name.
4	Observation Sub-ID	Not used
5	Observation Value	If sending file data, contains MIME application type, encoding (base64), and file bytes. If sending text data, contains a line of text.

Overview of the HL7 Connector Node

The HL7 Connector node allows you to connect to a TCP/IP server, look up patient information, and specify a variety of message and patient settings.

To configure the $\it HL7$ $\it Connector$, add a node for $\it HL7$ $\it Connector$ and double-click on it.

Note: You may need to disable any Firewalls that are running or forward the ports of any running Firewall to connect to this server.

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On this window, you can do the following:

- Check the Enabled box when there are multiple output locations. When unchecked, this output will be ignored. While the workflow will still
 validate, documents will not be output and may be lost.
- In the **Node Name** field, enter a meaningful name to the **HL7 Connector**.
- In the **Description** field, enter a description for the **HL7 Connector**. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.

Connecting to the TCP/IP Server

In the Receiving Facility (TCP/IP) area, enter information about the server to which the HL7 messages will be sent. You must specify the following:

- In the Facility Name field, enter an identifying name for the system that will be receiving the HL7 message.
- In the Server IP field, enter the server address of the system that will be receiving the HL7 message.
- In the Server Port field, enter the server port of the system that will be receiving the HL7 message.
- If the **Secure Connection** box is checked, the TCP/IP server is required to have TLS enabled in order to transmit scanned documents. When this option is checked, a confirmation message will appear.
- To ensure that ongoing HL7 communication proceeds smoothly, you can check the Wait for Response box to receive an acknowledgment (ACK)
 message from the receiving system before continuing to send messages. This acknowledgment message serves as a confirmation that the
 message was received, and the message is valid based on HL7 processing rules.
- Check the **Stop Sending on Failure** box to ensure that no further messages are sent to the receiving system if a failure occurred when receiving or processing an HL7 message. Please note that if this option is specified, the **Wait for Response** box must also be enabled.
- In the Sending Timeout (seconds) field, enter the number of seconds to wait before the sending operation times out.
- In the **Receiving Timeout (seconds)** field, enter the number of seconds to wait before the receiving operation times out. Note that the **Wait for Response** option must be enabled in order for this setting to take effect.

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• Click on the **Test Connection** button to make sure that the specified connection information entered is valid.

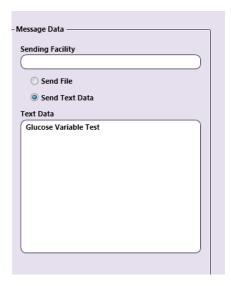
Specifying Message Settings

The **Message Settings** tab includes fields that allow you to specify the content of the HL7 message. These fields are typically accessed and filled out at the MFP during scan time. Using the Message Settings fields, an MFP user can specify specific information about the message, including:

- Message Type Choose from a pre-defined list of most commonly used HL7 message types for patient administration, orders, results, and charges, including: Admit Patient, Discharge Patient, Register Patient, Patient Information Update, Medical Document Upload, and Refer Patient.
- **Document Type** Choose from a pre-defined list to specify what type of document is being transmitted. Options include Consent to Treat, Consultation, Diagnostic Imaging, Discharge Summary, Emergency Department Report, HIPAA Consent, History and Physical Examination, Operative Report, Psychiatric Consultation, Psychiatric History and Physical Examination, Procedure Note, Progress Note, Referral / Order, Surgical Pathology, Transfer Summary.
- Document Identifier field Enter a brief title for the document that is being transmitted.
- Document Description field Enter a description of the document that is being transmitted.
- Document Date Specify when the document is being scanned.
- Environment Choose the environment (Debugging, Production, Training) in which the message will be sent.

In the Message Data area, you can also specify specific information that the HL7 message will contain, using the following fields:

- Sending Facility Enter the name of the facility from which the message will be sent.
- Select the **Send File** radio button to embed the binary file in the HL7 message. With this option enabled, the uploaded document will be sent to the folder that is created on the server system.
- Select the **Send Text Data** radio button to include specific formatted text data within the HL7 message. The Text Data can be entered in the Text Data box. This field accepts up to 250 characters. The scanned document will not be sent; only the text entered in the Text Data box will be sent within the HL7 message. For example, the following information is entered in the Text Data box:



Then the HL7 message would include the following data:

```
MSH|^~\&|Dispatcher Phoenix|||CB|201804251513||ADT^A01|20180425151351041|D|2.3.1|
PID|1||||Houston^Whitney^||20060410||||^^^^||
TXA|1|CN||20180425
OBX|1|TX|T55554^||Glucose Variable Test
```

Specifying Patient Settings

The **Patient Settings** tab includes fields that allow you to enter patient information (patient details and patient address/contact data) that can be associated with the scanned document.

Note: The Patient's First Name and Last Name are required to be entered in order to save the node configuration window.

Patient Details include:

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- Patient ID
- · First Name
- Middle Name
- Last Name
- · Date of Birth
- Gender
- · Street Address
- City
- State
- Zip Code
- Country
- Phone number

Note: All fields on the Message Settings and Patient Settings tabs accept Metadata. To browse for metadata to add to the fields, click on the **Metadata** button and the Metadata Browser window will appear. Using this window, you can drag-and-drop variable names from the Metadata Browser to the appropriate open text fields.

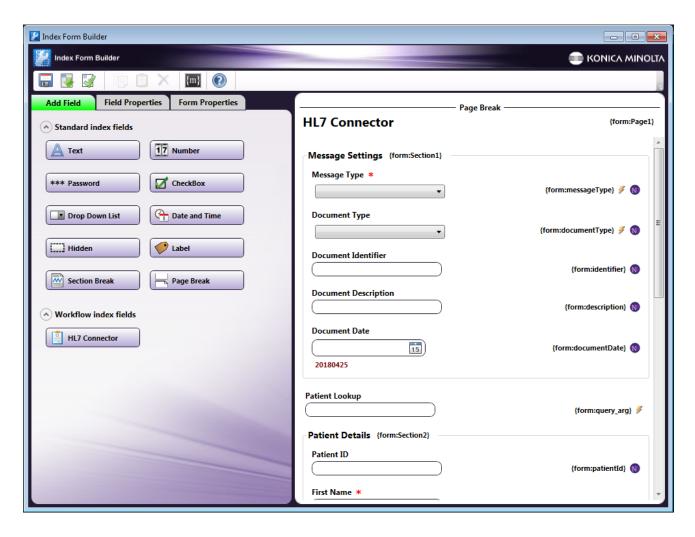
• Select the **Save** button to keep the **HL7 Connector** definition. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Creating an HL7 Index Form

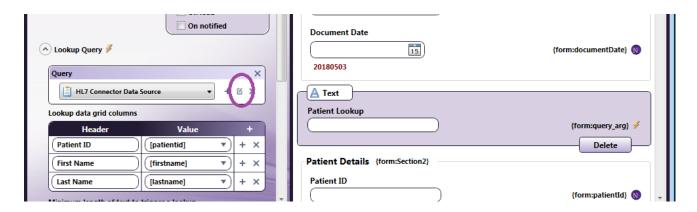
You can create an index form that allows you to look up patient information, specify message settings, and enter patient information at the MFP. Do the following:

- 1. Make sure that your workflow includes (at least) a MFP Panel node and HL7 Connector Node.
- 2. Open up the Index Form Builder from the MFP Panel node. You should see an HL7 Connector button under the Workflow Index Fields area.
- 3. Drag and drop the **HL7 Connector** button to the Index Form work area. A default HL7 Connector index form will automatically appear, as in the following illustration:

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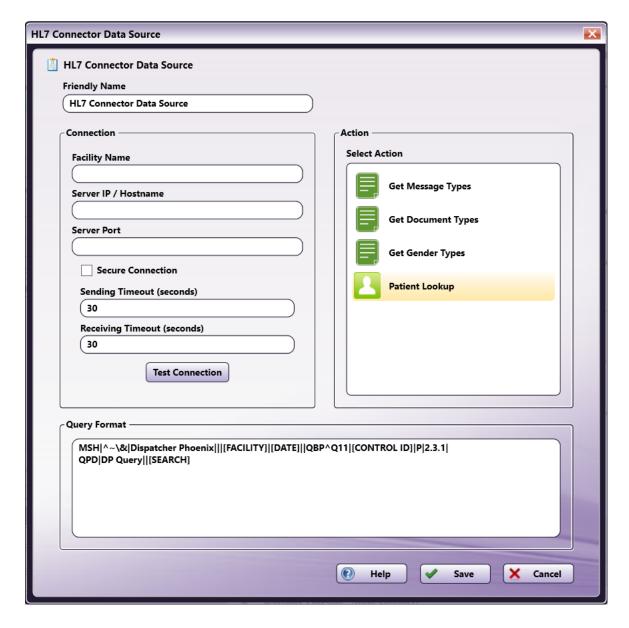


- 4. If required, you can configure the Index Form for patient lookups, following these steps:
 - a. Select the Patient Lookup field.
 - b. On the Field Properties panel, edit the HL7 Connector Data Source. See the following illustration for an example:



c. The HL7 Connector Data Source window will appear, as in the following illustration:

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On the HL7 Connector Data Source window, do the following:

- In the Facility Name field, enter an identifying name for the database that the user will use for patient look up.
- In the Server IP field, enter the server IP address of the system from which you will be retrieving patient information.
- In the **Server Port** field, enter the server port of the system from which you will be retrieving patient information.
- If the **Secure Connection** box is checked, the TCP/IP server is required to have TLS enabled in order to transmit scanned documents. When this option is checked, a confirmation message will appear.
- In the Sending Timeout (seconds) field, enter the number of seconds to wait before the sending operation times out.
- In the Receiving Timeout (seconds) field, enter the number of seconds to wait before the receiving operation times out. Note that the
 Wait for Response option must be enabled in order for this setting to take effect.
- Select the **Test Connection** button to make sure that the specified connection information entered is valid.
- Modify the query using the **Query Format** field. The Query Format field contains the query that will be sent to retrieve patient information from the system when a patient lookup is requested at the MFP. The default query includes the following replacement words:
 - FACILITY The facility name entered in the Connection field.
 - DATE The date/time the message was sent in YYYYMMDDHHMM format.
 - CONTROL ID A randomly generated identifier for the message.
 - SEARCH The search that was entered by the user at the MFP.

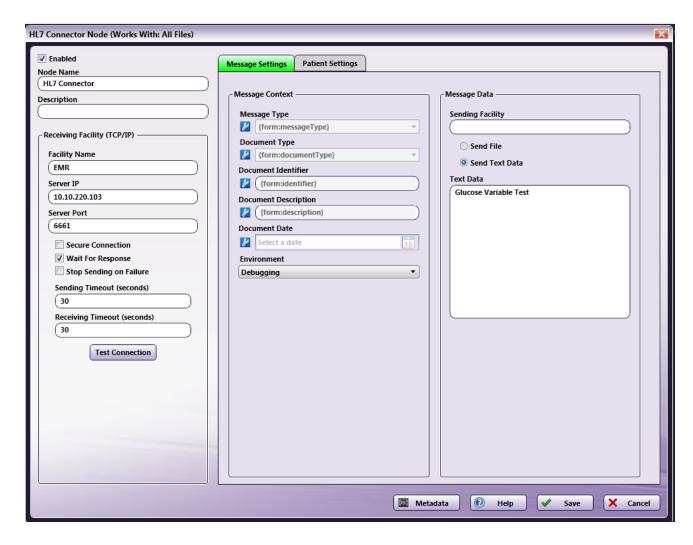
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This default query can be fully customized with any Index Form metadata to be compatible with the system that is being queried.

• Select the Save button when you are done.

Notes:

- If you are not using patient lookups at the MFP, make sure that you delete the Patient Lookup field from the Index Form.
- Patient lookups are not supported on the Native MFP User Interface.
- 5. Save and close the Index Form.
- 6. Configure the MFP Panel node with any necessary MFPs; then save the MFP Panel node.
- 7. Double-click on the **HL7 Connector** to configure its connection details.
- 8. In the **HL7 Connector node** configuration window, enter connection information about the system that will be receiving the HL7 message. You will notice that the other fields are filled in with Index Form metadata variables, as in the following illustration:



9. Save the **HL7 Connector** node.

HL7 Metadata for Index Forms

When building a custom index form, Message Types, Document Types, and Genders require the following specific metadata values:

Message Type Metadata Values

Display Name	Metadata Value
Admit Patient	ADT A01
Discharge Patient	ADT A03

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Display Name	Metadata Value
Register Patient	ADT A04
Patient Information Update	ADT A08
Medical Document Upload	MDM T02
Refer Patient	REF I12

Document Type Metadata Values

Display Name	Metadata Value
[NOT SPECIFIED]	N
Consent to Treat	СТ
Consultation	CN
Diagnostic Imaging	DI
Discharge Summary	DS
Emergency Department Report	ED
HIPAA Consent	HC
History and Physical Examination	HP
Operative Report	OP
Psychiatric Consultation	PC
Psychiatric History and Physical Examination	PH
Procedure Note	PN
Progress Note	PR
Referral / Order	RO
Surgical Pathology	SP
Transfer Summary	TS

Gender Metadata Values

Display Name	Metadata Value
[NOT SPECIFIED]	[BLANK]
Ambiguous	A
Female	F
Male	М
Not Applicable	N
Other	0
Unknown	U

Scanning at the MFP

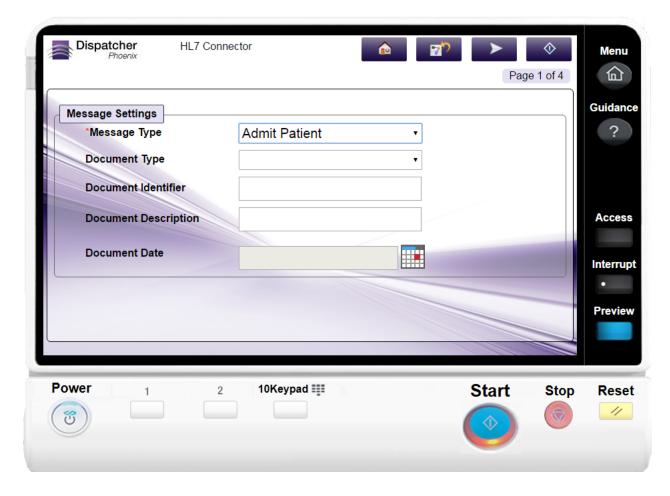
To use the HL7 Connector at the MFP, do the following:

- 1. Create an HL7 workflow that uses the HL7 Index Form.
- 2. Make sure that the HL7 workflow is running.
- 3. At the MFP, access the Dispatcher Phoenix app.
- 4. Access the HL7 Index Form. The following screens will appear:

1st Screen: Enter Message/Document Settings

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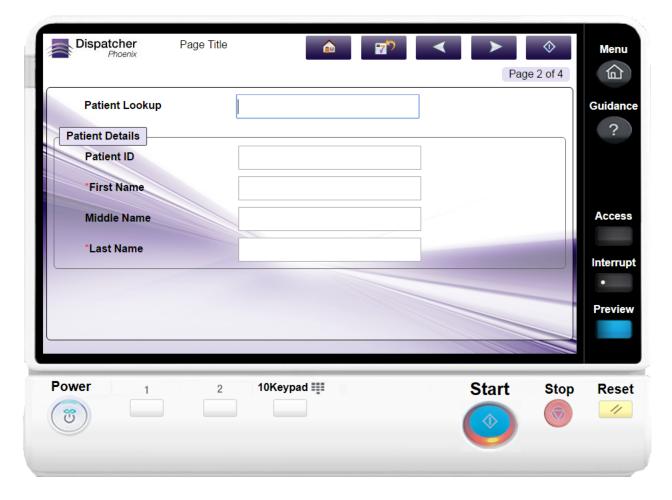
On this screen, you can specify the message type, type of document being scanned, as well as other information that helps identify the document (identifier, description, and scanning date).



2nd Screen: Look up Patient

On this screen, you can search for a specific patient within the EHR that the scanned document should be associated with. Enter characters in the Patient Lookup field to search; once you choose a patient name, information will be retrieved from the EHR and automatically populated in the other index fields.

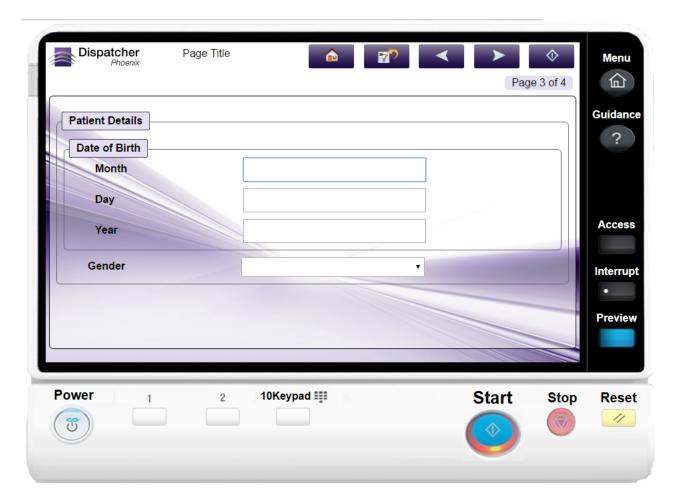
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3rd Screen: Enter Patient Details (Date of Birth and Gender)

On this screen, you can enter additional information about the patient, including their date of birth and their gender.

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The Date of Birth fields have the following constraints:

- $\circ~$ The Month value must be between 1-12.
- The Day value must be between 1-31.
- The Year must be 4 digits.

4th Screen: Enter Patient Contact Information On this screen, you can enter additional contact information about the patient.

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5. Tap on the **Start** button when you are done.

HTTP Out



The HTTP Out Node is used to distribute output files to a server via a URL. Use the HTTP Out Node settings screen to specify and test that URL.

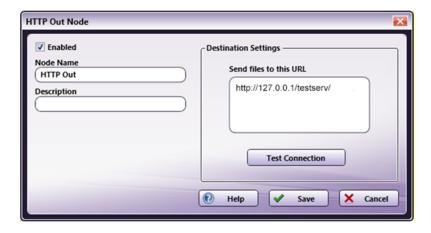
Notes:

- The HTTP Out node only supports the http POST request method to upload files to a server.
- The HTTP Out Node supports metadata in URL.

Using the HTTP Out Node

Add the HTTP Out Node to the workflow by dragging the node's icon onto the Workflow Builder canvas, and then double-clicking on the icon to open the HTTP Out Node:

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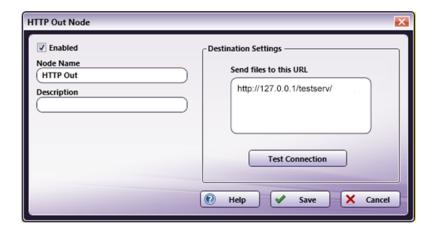


- Select the **Enabled** box so that the process will run. When unchecked, this process is ignored. Documents pass through as if the node were not present (i.e., continue along the default or *positive* path). Note that a disabled node will not check for logic or error conditions.
- In the **Node Name** field, enter a meaningful name for the HTTP Out node.
- In the **Description** field, enter a description for the HTTP Out node. Although this is not required, it can be helpful to distinguish between multiple collection points. If the description is long, hover the mouse over the field to read its entire contents.
- In the **Send files to this URL** field, specify the HTTP path to which files should be sent. An error message will pop-up if an illegal value is entered.
- Click the **Test Connection** button to make sure the connection to the destination URL works as expected.
- Click the Save button to save the changes. If Cancel is selected and the window is closed, the changes are not saved.
- Click the **Help** button to access online help.

Testing the HTTP Out Node's Destination Settings

When a job reaches an HTTP Out node, it is sent to the URL entered in the **Destination Settings** panel. Use the **Test Connection** button to make sure the connection to the URL works as expected.

- 1. Launch the HTTP Out Node settings screen.
- 2. Enter the destination server's URL in the **Send files to this URL field**.
- 3. Click the **Test Connection** button:



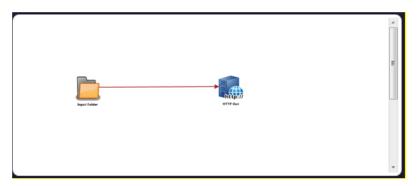
- 4. The function checks the validity of the URL value entered in the field. If it is valid, a success message launches.
- 5. If the server is configured to require authentication credentials, the connection will fail. An error message launches noting this situation. The server-side authentication must be removed for the connection to be successful.
- 6. If the server is configured so that files cannot be submitted, a success message launches if the URL is valid. Even though the URL is valid, however, the server configuration will still prevent files from being sent to the URL. To correct this, the server-side settings MUST be modified so that the server can accept files.

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Sample of an HTTP Out workflow

The purpose of this workflow is to distribute output files to a server via a URL.

In the sample workflow below, jobs are submitted to an Input folder and then sent to the HTTP Out server via the specified URL:



Input Folder Node: The source file path must be configured in the Input folder.

HTTP Out Node: The HTTP Out Node should be configured to send files to the destination URL. (See instructions in the *Using the HTTP Out Node* section providing earlier in this topic.)

Once the HTTP Out node is configured and the connection test is successful, the node may be used in workflows.

Note: Make sure that if the situation noted in Section **Testing the HTTP Out Node's Destination Settings**, Step 6 is properly addressed or the HTTP Out node will NOT function as expected.

Sample Code for Setting up Server for HTTP Out

SAMPLE PHP SERVER CODE

PHP Server code can be used to set up a server to receive jobs from the HTTP Out node. The block below is an example of the code used to create the destination server using PHP:

```
<?php
if(empty($_GET) || $_GET['file'] == '') {
            echo "<p>'file' argument is missing in the request.";
            return;
}

$uploaddir = 'C:/Users/test.user/Desktop/Test/output/'; //update the location of your file here.
$uploadfile = $uploaddir . $_GET['file'];

$data = file_get_contents('php://input');

echo "";
if(file_put_contents($uploadfile,$data)) {
            echo "File uploaded successfully: " . $uploadfile . "";
} else {
            echo "Failed to upload " . $uploadfile;
}
echo "";
```

Microsoft Exchange



Use the **Microsoft Exchange Node** to distribute documents through Microsoft Exchange, a server-based application used for email hosting, calendar sharing, and contact management.

Important! When upgrading from Dispatcher 8.6 or older to Dispatcher Phoenix 8.7 or newer, any workflows using a **Microsoft Exchange** node will need to have that node and any associated Index Forms replaced and configured before those workflows can be restarted.

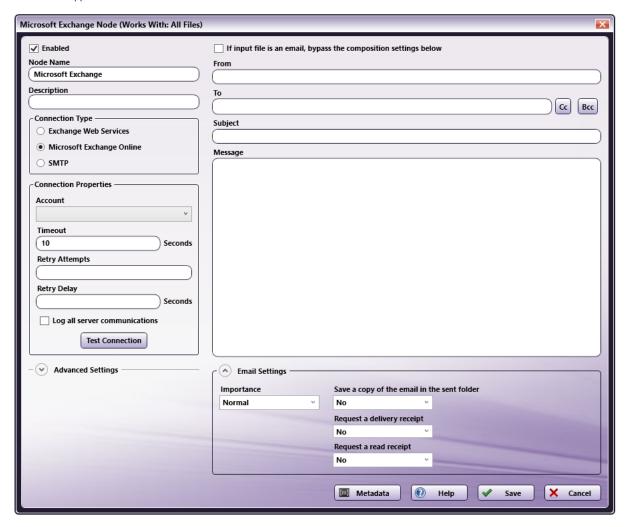
Exchange Versions Supported:

• Microsoft Exchange 2010 SP2

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- Microsoft Exchange 2013
- Microsoft Exchange 2016
- Microsoft Exchange 2019
- Office365

To open the Microsoft Exchange Node properties window, add an output node for Microsoft Exchange to the workspace and then double-click on it. The window appears in the illustration below:



Configuration Options

To configure the Microsoft Exchange Node, first specify your preferences at the following fields and then specify preferences in the other areas of the page.

- Enabled For multiple output locations, check this box. If unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- ${\bf Node\ Name}$ Enter a meaningful name for the Microsoft Exchange Node.
- **Description** Enter a description for the Microsoft Exchange Node. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.

Connection Type

To specify a connection type, select one of the following options:

- Exchange Web Services The native Microsoft Exchange protocol.
- Microsoft Exchange Online The online Microsoft Exchange protocol.
- SMTP The Simple Mail Transfer Protocol that is standard for email transmission.

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Note: The options available in the Email Settings section vary based on your selection here.

Connection Properties

Specify the connection properties for your selected connection type.

Exchange Web Services

- Web Service URL Enter the URL of the Microsoft Exchange's EWS endpoint. The format is: https://<server>/EWS/Exchange.asmx
- Username Enter the username for your Microsoft Exchange account.
- Password Enter the password for your Microsoft Exchange account.
- Timeout Enter the seconds allotted for the time without communication before a timeout occurs, if necessary.

Note: If multiple servers are associated with a hostname (e.g., smtp.office365.com), each server will be allowed the full timeout.

- · Retry Attempts Enter the number of times to retry the connection before timeout.
- Retry Delay Enter the seconds allotted before a retry is attempted.
- · Log all server communications Check this box to log all server communications.
- Test Connection Click this button to check if the URL and credentials that were entered are valid.

Note: To view the log, right-click the Activity Log of the workflow, select Log Level, then select Debug.

Microsoft Exchange Online

- Account Select an account from the dropdown menu. Note that you must first add a Microsoft Exchange account in **Dispatcher Phoenix Web** before it will appear in the dropdown.
- Timeout Enter the seconds allotted for the time without communication before a timeout occurs, if necessary.
- Retry Attempts Enter the number of times to retry the connection before timeout.
- Retry Delay Enter the seconds allotted before a retry is attempted.
- Log all server communications Check this box to log all server communications.

Notes:

- If you have not already set up a Microsoft Exchange through Dispatcher Phoenix Web, you must do this before it will appear in the dropdown.
- The Microsoft Exchange Online function works for both the Microsoft Exchange Online and Outlook.com email services.

SMTP

- Host / IP Address Enter the identifying host name for the outgoing, external SMTP email server or its IP address.
- Port Enter the port used by the server for SMTP communication (default is 25).
- Enable SSL Enable this option to connect to SMTP servers that allow only SSL connections. With this option, support for SSL servers is enabled. If you check this box, the port number automatically changes to the secure SMTP port default of 465 unless the port was customized already. For configuration options with particular SMTP servers, please refer to their latest documentation.
- Username Enter the username for your Microsoft Exchange account.
- Password Enter the password for your Microsoft Exchange account.
- Timeout Enter the seconds allotted for the time without communication before a timeout occurs, if necessary.

Note: If multiple servers are associated with a hostname (e.g. smtp.office365.com), each server will be allowed the full timeout.

- Retry Attempts Enter the number of times to retry the connection before timeout.
- $\mbox{\bf Retry Delay}$ $\mbox{\bf Enter}$ the seconds allotted before a retry is attempted.
- Log all server communications Check this box to log all server communications.

Note: To view the log, right-click the Activity Log of the workflow, select Log Level, then select Debug.

• Test Connection - Click this button to check if the URL and credentials that were entered are valid.

Advanced Settings

The following advanced settings are available:

- Include file attachments To include file attachments, click the drop-down and select Yes. Otherwise, select No.
- Send email for each attachment To send an email for each attachment, click the drop-down and select Yes. Otherwise, select No.

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Note: If you choose to send all attachments in a single email, then using per file metadata may not work as intended. That is, if you choose to send all attachments in a single email and you use the "filename" metadata in your node, the system will pick the filename of one of the attachments. To use per file (or page level) metadata, choose to send an email for each attachment.

- Message Limits
 - · Max number of Attachments Enter the maximum number of attachments you want to include on the email.
 - · Max Attachment Size Enter the maximum size (in KB) of an attachment you want to include on the email.
- **Filename Encoding** You can customize the way email attachments' filenames are sent to the SMTP server. This option is available only for the **SMTP** Connection Type. Use this advanced feature when an email client is incorrectly displaying attachment filenames that are sent from Dispatcher Phoenix. The following options are available:
 - Modern Email Clients This option encodes filenames using the RFC2231 encoding scheme. This is the newest standard and is recommended for use with modern email clients.
 - Legacy Email Clients This option encodes filenames using the RFC2047 encoding scheme, which uses character sets that cause the filenames to be encoded in the lowest possible size.
 - Legacy Email Clients Compatibility Mode This option encodes filename using the RFC2047 encoding scheme, which uses base64 UTF-8 encoding for all filenames. With this option, the filenames will be largest but compatible with the largest number of email clients.

Compose Mail

Use this area to do the following:

• If input file is an email, bypass the composition settings below - To allow the composition settings (From, To, Cc, Bubject, Message) and any email attachments to be pulled from an email file, check this box. Additionally, any header information in the email file is also sent. When an email file is detected in the Microsoft Exchange node, its settings are used instead of the information provided in the composition settings fields and its attachments are sent. The supported email file types are: ".eml" files captured from third-party software and ".mbox" files generated by the SMTP In node.

Notes:

- If you enable this option, the **Send email for each attachment** option is automatically set to **Yes** and is no longer configurable. This is because email files can contain their own list of attachments. Since the workflow cannot mix email file attachments with other input files as attachments, this setting requires an individual email to be sent for each input file.
- If you select Exchange Web Services (EWS) as your connection type, the From, To, Cc, Bcc, Subject, Message, and email attachments are
 extracted from the email file and converted into the EWS format expected by the Microsoft Exchange server. In other words, any other
 header information from the email file is not used.
- If you select **SMTP** as your connection type, the Microsoft Exchange node will send email files with all associated header information from the file (since SMTP supports the email file format directly).
- From Specify the sender's email address.
- To Specify the recipient's email address. For multiple addresses, separate by inserting a comma, semicolon, or new line.
 - Cc To display the Cc field where you can enter one or more "carbon copy" email addresses for the email, click this button.
 - Bcc To display the Bcc field where you can enter one or more "blind carbon copy" email addresses for the email, click this button.

Note: The above address fields support the use of dynamic variables.

- Subject Specify a subject line for the email.
- Message Specify the message to accompany the output file(s).

Email Settings

The options available in this section vary based on your selected connection type.

- Sensitivity Use the dropdown list to select the sensitivity of the message. You have the following options:
 - Normal
 - Private
 - Personal
 - Confidential

Note: Sensitivity setting is not available when using the Microsoft Exchange connection type.

- Importance Use the dropdown list to select the importance of the message. You have the following option:
 - Low
 - Normal

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The following options are available only if you select Exchange Web Services as the connection type:

- Save a copy of the email in the sent folder Use the drop-down list to select whether or not to save a copy of the email in the sent folder of the From account.
- Request a delivery receipt Use the drop-down list to select whether or not to request a delivery receipt.
- Request a read receipt Use the drop-down list to select whether or not to request a read receipt.

Note: If you attach an **index form** to a workflow containing the Microsoft Exchange node, all options in the Email Settings area except the **Save a copy of the email in the sent folder** option will be overridden by settings in the index form and you cannot edit them here. For more information, see the **Using the Microsoft Exchange Index Form** section below.

Buttons

· The use of metadata.

• Metadata - To open the Metadata Browser, click on this button.

Note: Metadata is available only if it has been added by another node first.

- · Help To access the Online Help, click this button.
- · Save To keep your changes, click this button.
- Cancel To exit the window without saving any changes, click this button.

Using Dynamic Variables for Email Header Metadata

The address fields (From, To, CC, and Bcc) support the following:

· Sending to multiple email addresses using commas (,), semi-colons (;), and spaces. See the following examples:

```
accounting @emailhosting.com; manufacturing @emailhosting.com sales @emailhosting.com \\ accounting @emailhosting.com, manufacturing @emailhosting.com, sales @emailhosting.com \\ accounting @emailhosting.com, manufacturing @emailhosting.com, sales @emailhosting.com \\ accounting @emailhosting.com, manufacturing @emailhosting.com, sales @emailhosting.com \\ accounting @ema
```

- $accounting @emailhosting.com\ manufacturing @emailhosting.com\ sales @emailhosting.com$
- Specifying a backup address if the metadata doesn't exist. In this case, the keywords "or", "orelse," "else," and "or-else" can be used to specify back up addresses for metadata.

With these keywords, if the metadata specified on the left side of the keyword doesn't exist, the email address specified on the right side will be used as in the following examples:

```
{email : accounting} else accounting@emailhosting.com

{email : accounting} or accounting@emailhosting.com, {email : manufacturing} or manufacturing@emailhosting.com, {email : sales} or
sales@emailhosting.com
```

You can combine multiple back up addresses if you wish to check multiple metadata fields as well. In these cases, the first metadata, from left to right, that is present will be used, as in the following example:

```
{email : accounting} or {email : account manager} or accounting@emailhosting.com
```

Note: The backup logic is always read from left to right. In the following example, the metadata will never be used because the static email value will be read first:

accounting@emailhosting.com or {email : accounting}

Using the Microsoft Exchange Index Form

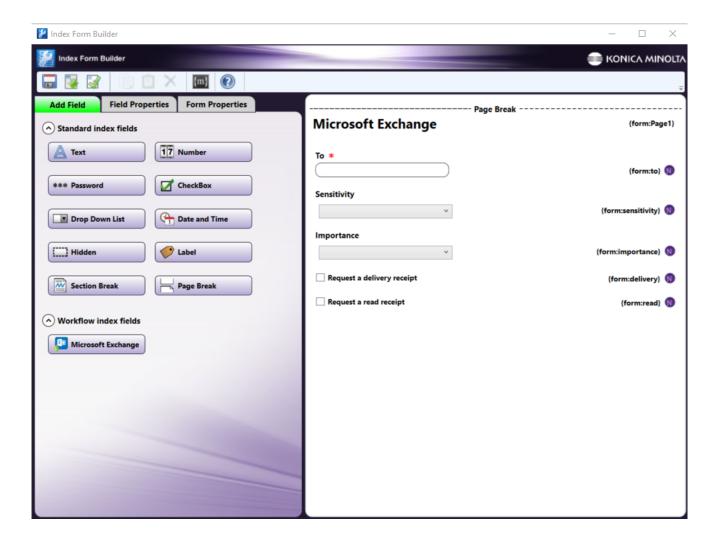
Dispatcher Phoenix's **Index Form Builder** includes a pre-built index form for use with the Microsoft Exchange node. Once you add the node to a workflow, you can access the index form using the Index Form Builder. This process consists of the following basic steps:

- 1. Make sure your workflow includes an MFP Panel node and a Microsoft Exchange node.
- 2. **Configure the Microsoft Exchange node** to connect to the appropriate server. You must complete this step prior to configuring the Microsoft Exchange index form.

Configuring the Microsoft Exchange Index Form

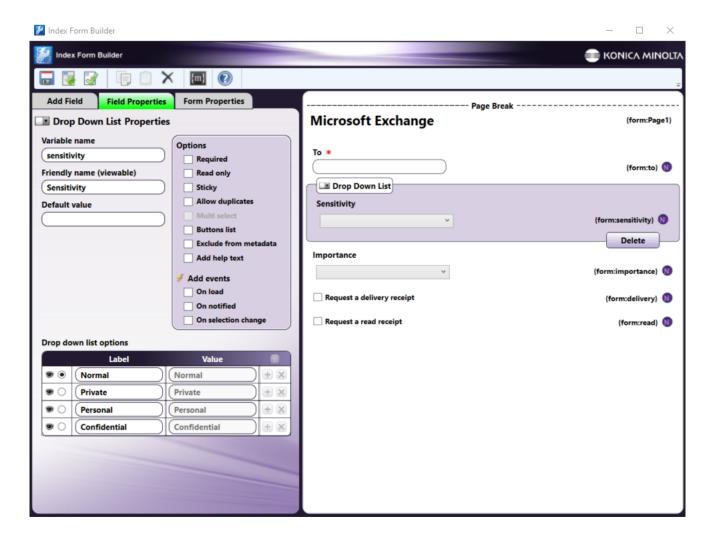
In the MFP Panel node in your workflow, open the Index Form Builder and drag-drop the Microsoft Exchange icon from the Workflow Index Fields section to the work area on the right side of the window. The index form appears in the pane next to the **Add Field** tab, as shown in the following illustration:

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When you click on one of the index form fields in the work area, the **Field Properties** tab opens in the left pane displaying options for the selected field. The illustration below shows the options for the **Sensitivity** field:

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The Microsoft Exchange index form includes the following fields:

- To This **Text field** displays the contents (if any) of the **Default Value** field on the **Field Properties** tab, where you can specify one or more default destination email addresses to appear at the **To** field on the MFP.
- Sensitivity Use this Drop-down field to specify the "sensitivity" of the email. The drop-down includes the following options:
 - Normal
 - Private
 - Personal
 - Confidential

For each item at the **Drop down list options** field, the following options are available:

- Eye icon To hide one or more options from view at the MFP, click the Eye icon next to a Sensitivity option.
- Radio button To select a default value to appear at the MFP, click the radio button next to a Sensitivity option.



- Importance Use this Drop-down field to specify the "importance" of the email. The drop-down includes the following options:
 - Low

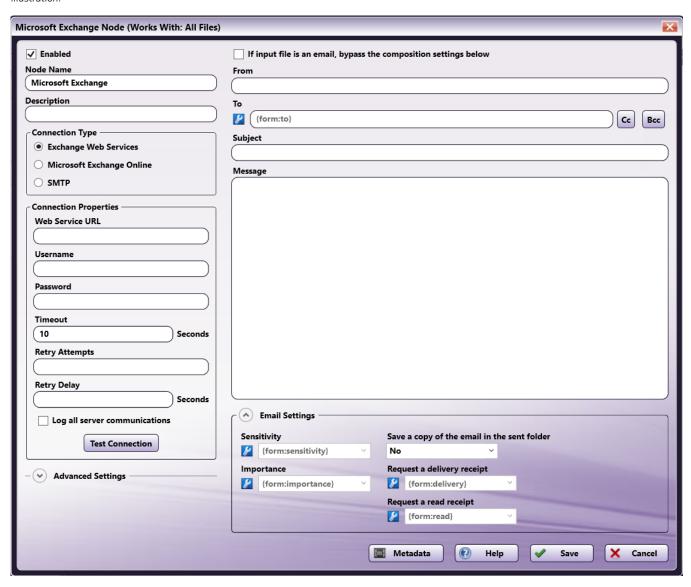
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- Normal
- High

For each item at the **Drop down list options** field, the following options are available:

- Eye icon To hide one or more options from view at the MFP, click the Eye icon next to an Importance option.
- Radio button To select a default value to appear at the MFP, click the radio button next to an Importance option.
- Request a delivery receipt This field provides the option to request a delivery receipt for the email at the MFP. Default labels "Yes" and "No" are provided. You can specify your own labels.
- Request a read receipt This field provides the option to request a read receipt for the email at the MFP. Default labels "Yes" and "No" are provided. You can specify your own labels.

Note: If you enable the Microsoft Exchange index form via the MFP Panel Node, the fields on the index form overwrite the fields of the Microsoft Exchange node (for example the **Sensitivity** and **Importance** fields) and you cannot edit them unless you disable the index form. See the following illustration:





Please note the following with regard to your connection type.

SMTP

If you are using **SMTP** as your connection type, note that third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix Email Out nodes. By default, Email Out uses port 25. However, this port number is configurable, so it may differ if the number has

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been changed. If mail fails to send, check the workflow log for the following message:

[Warning\][SMTP user@mail.com\]Connection failed to SMTP server mail.com:25

To allow the Microsoft Exchange node to function properly, consult your firewall application documentation to either stop blocking port 25 or to allow access by the workflow engine process, "blox-erl.exe."

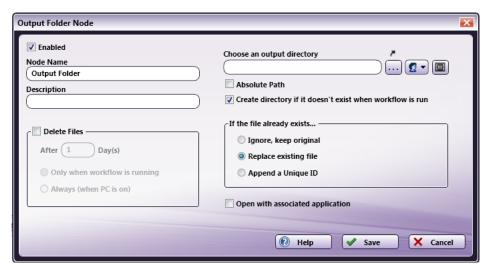
EWS

If you are using EWS as your connection type, a firewall may still block outbound traffic, though it is unlikely.

Output Folder



The **Output Folder** node distributes files to a designated folder. To open the Output Folder Node window, add a node for Output Folder and double-click on it.

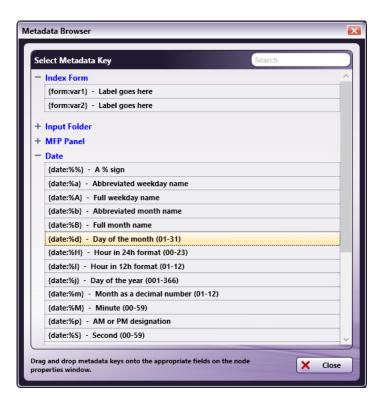


- Enabled Check this box when multiple output locations exist. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be output and may be lost.
- Node Name Enter a meaningful name for the Output Folder node.
- **Description** Enter a description for the Output Folder node. Although this is not required, it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- **Delete Files** Check the box to activate the fields in this area. Next, then enter the number of days after which your files will be deleted from the output location. Note that it may take approximately 30 minutes before files are deleted. If you do **not** want the files deleted, leave the check box empty. If you check this box, you should specify whether you want the files deleted:
 - Only when workflow is running. When this option is enabled, files are deleted when the workflow is running. Files will also be deleted if Dispatcher Phoenix is closed but the workflow is running as a service.
 - Always (when PC is on). When this option is enabled, files are deleted when the PC is on. Dispatcher Phoenix does not have to be open in order for files to be deleted.

Note: If the Delete Files box is checked, all files in the output folder (even files that are unassociated with Dispatcher Phoenix) will be deleted.

- Choose an Output Directory Click on the ellipsis button or the curved arrow to find and select the output location. You can enter the output directory name or use dynamic variables in this field.
 - To browse for workflow metadata, click on the Metadata button. The Metadata Browser window appears. Using this window, you can
 drag-and-drop variable names from the Select Metadata Key area to the Choose an output directory open text field, as in the following
 illustration:

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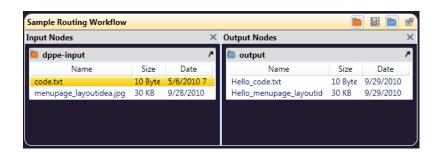


In this window, each dynamic variable is enclosed in curly brackets ("{" "}"). This tells the application that a dynamic variable is being used. Next, the type of dynamic variable is specified.

To create a folder using two different kinds of dynamic variables, a back slash (\) should be added between the two variables (e.g., {fs:DesktopDirectory}{{date:%B}{date:%Y}})

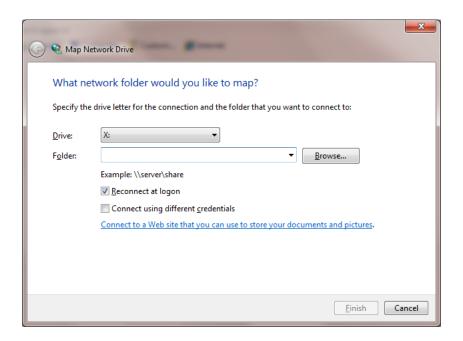
In addition, to create subfolders within a folder, each folder name or dynamic variable should be separated by a back slash (\) (e.g., $fs:DesktopDirectory){date:%p}{date:%p}$)

Note: In the case of dynamic variables that encompass a short period of time, for example seconds or minutes, the Dispatcher Phoenix interface may not always monitor these dynamically created folders. The new folders will still be created, as necessary, when files are processed, reflecting the new time data in each folder name. However, the Output Nodes section will not be able to monitor and display the contents of these new folders.



• When distributing to a *new* mapped network drive, make sure that the **Reconnect at Logon** box is checked when you specify the network drive on the Map Network Drive window. When adding a new folder to an *existing* mapped network drive, you must disconnect from the mapped network first (by right-clicking on the drive and selecting the Disconnect option) before reconnecting on the Map Network Drive window. At this point, you may need to enter your network credentials again.

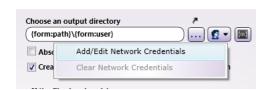
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• When creating an Output Folder that points to a network directory, you will need to enter network credentials. If the specified path is a custom path, network credentials can still be specified for it. For example, if you are using metadata variables to create a folder on the network share (e.g., \lserver\data\{email:to}\) or \{form:path}\\{form:user\}\), you can enter credentials for the path to ensure that the folder is dynamically created.

Note: Dispatcher Phoenix only supports CIFS and SMB network shares.

To add or modify network credentials, select the **Network Credentials** button to the right of the ellipsis button; then, choose **Add/Edit Network Credentials** to open up the Network Credentials pop-up window.



To remove any network credentials that have been specified, select the Clear Network Credentials option.

On the Network Credentials window, you can select your username and enter the appropriate password.



Note: Passwords will be stored in encrypted format with the workflow.

If the expanded path is an absolute path, network credentials will be ignored when the workflow is running.

• This field will also accept and store the username and password as part of the path name. For example, if you enter: <file://test:test@servername/folder/user>, the username and password (test, test) will be used as the network credentials; in this case, any user-provided network credentials (entered on the Network Credentials window) will be ignored and the password will not be encrypted.

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- If this Output Folder node has been used in an Index Form that is associated with this workflow, the following icon will appear to the left of the **Choose an output directory entry** field: [2]. Click on that icon to open up the Index Form that contains the Output Folder.
- To make sure that the output location entered never changes per user, check the **Absolute Path** box. This option disables any kind of substitutions performed on the location. The default setting (unchecked) is to allow for replacing the path with predetermined file system variables.

Note: When creating a workflow that will be shared, this option should be disabled (since files will not be distributed to the folder unless the user running the workflow has permission to write to that folder).

• Check the *Create directory if it doesn't exist when workflow is run* box to create a new output folder. When using variables to create an output directory, make sure this checkbox is enabled so that the folders will be created when the workflow runs.

Note: If the directory does not exist when the workflow is run and you choose not to create it automatically, files will be lost as they have no destination. It is recommended that, if you choose not to create the new folder, you use an error transition to prevent file loss should the directory not exist.

- If the file already exists... Choose one of the following options:
 - Ignore, keep original To prevent duplicate processed files.
 - Replace existing file If this process supersedes the previous process.
 - Append a Unique ID To keep both versions of a processed file.
- Open with associated application Check this box to open the files, after they have been processed and filed, using the application associated with the file type.
- Help Click this button to access Online Help.
- Save Click this button to retain your Output folder attributes.
- Cancel Click this button to exit the window without saving any changes.



Firewall Note

Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix output folders. Dispatcher Phoenix uses SMB/CIFS protocols to access Windows directories. By default, SMB/CIFS requires a number of different ports depending on operating system and network requirements. If the connection fails, check the workflow log for the following message:

Failed to access directory: '\|server\|share\|path\|to\|file'

To allow Windows directories to be accessed properly, please consult your firewall application documentation to allow access by the workflow engine process, "blox-erl.exe."

Using OCR Zones To Create Folders

To create folders based on an incoming document's OCR zones, use the following syntax:

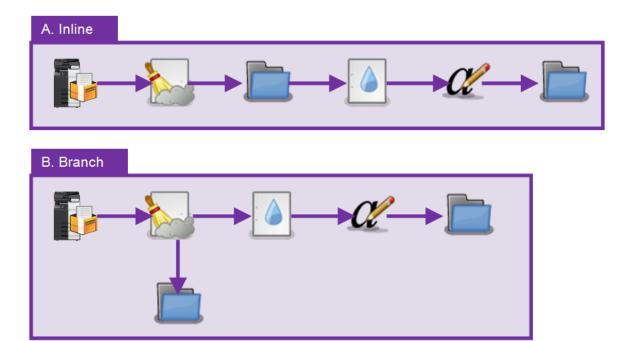
{ocr:zone.name of zone[page number]}

For example, to reference a defined OCR zone called 'client' on page one of a document, you would enter the following: {ocr:zone.client[1]}. To create the 'client' OCR zone folder on your Desktop, you would enter the following: {fs:DesktopDirectory}\{ocr:zone.client[1]}. With this example, if the OCR zone extracts 'ABCD,' a folder on your Desktop named ABCD would be automatically created.

Special Note About Output Folders

Outputs, in general, act as endpoints for the workflow. Once a file comes to an output node, that workflow or branch of the workflow is done. However, output folders pose an exception to that rule. Unlike other output types, such as printers or email, files may continue along the workflow after reaching an output folder node.

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In the example above, both workflows provide the same result. Each takes an input from an MFP scanner and despeckles the file. The resulting file is saved to a folder prior to being watermarked and annotated and then sent to a second output folder. The difference is that **Workflow A (Inline)** performs an immediate save of the file, then passes files through the output folder, while **Workflow B (Branch)** performs an intermediate save outside of the main flow of the workflow. There are certain advantages and disadvantages of using the **Workflow A (Inline)** method:

Advantages

Performance: Perhaps the biggest advantage to keeping the output folder in line with the rest of the workflow is an increase in performance. Since this method requires only a single process (as opposed to the two required by the Branch method - one to copy the file to the folder and a second to move the file along to the watermark), less resources are needed and processing speed is increased.

Catch Errors: Errors during processing are caught more easily. Measures must be taken, namely through the use of the Error Connector Type, to ensure that files are processed properly.

Disadvantages

Important! As a special case, there are certain limitations which are also placed on output folders. Even though the folder appears as being an input to the next step in the workflow, the output folder will only pass along files received as part of the workflow. This means that any files that previously existed in the folder or were placed there outside of the workflow (copied from your desktop, for example), will not be included with the files being processed and therefore remain untouched in the folder.

Halted Processing: Since there is no other path to the rest of the workflow, if an error occurs at the point of saving to the output folder (a disconnected network drive, for example), the workflow will halt processing and the job will not complete.

Output Printer

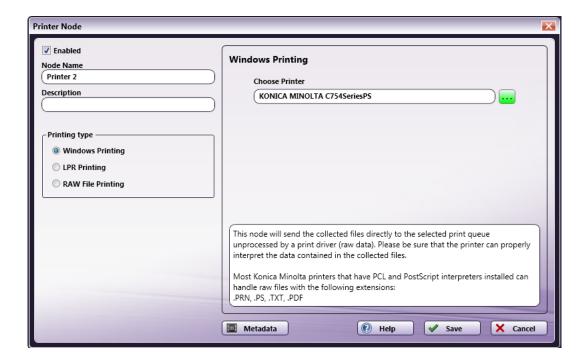


To distribute to an MFP for printing and open up the **Printer Node** window, add a node for **Printer** and double-click on it. The setup to output to a printer will vary based on installed applications and printers available on the network. Files can be sent for **Windows**, **LPR**, or **Raw File** printing.

Note: If you are having problems printing a specific file (of any supported document format), try using the PageScope Web Connector Direct Print feature to print the file. If the problem persists, contact your Konica Minolta representative with the file at issue.

Windows Printing

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For **Windows Printing**, you choose an available printer, but an application is not necessary, as raw data is sent and a print driver is not used. Click on the **ellipsis** icon (...) to select the desired printer. The **Select a Printer** window will appear, as in the following illustration:



You can also use metadata in that field by clicking on the **Metadata** button to launch the Metadata Browser window. From the Metadata Browser window, you can drag-drop metadata into the empty field provided.

Note: Not all printers have the ability to print all native file types. Please check that your target printer can natively print your intended file type before running your workflow.

LPR Printing

For LPR Printing, you need to enter the LPR Host/IP Address and identify the LPR Queue.

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Printer Node Enabled Node Name Printer 2 Description Windows Printing LPR Printing RAW File Printing	LPR Printing LPR Host/IP Address LPR Queue Queue User Name {user:name}
	Please consult your administrator or printer manual for settings on this page. The settings may vary depending on the printer model. This node will send the collected files directly to the selected print queue unprocessed by a print driver (raw data). Please be sure that the printer can properly interpret the data contained in the collected files. Most Konica Minolta printers that have PCL and PostScript interpreters installed can handle raw files with the following extensions: .PRN, .PS, .TXT, .PDF Metadata Metadata Cancel

Enter either a valid host name (i.e., mysubdomain.domain.com) or numeric IP address (i.e., 10.10.220.110) in the LPR Host/IP Address field or click the *ellipsis* button (...) to open the MFP Explorer tool.

For logging purposes, the default user name used is the name of the Windows logged-in user (as signified by the {user:name} metadata listed in the User Name field). To change the default user name set via LPR, click on the **Metadata Browser** button next to the **User Name** field. This will launch the Metadata Browser window, which will allow you to browse through and choose/specify other metadata to use for the User Name.

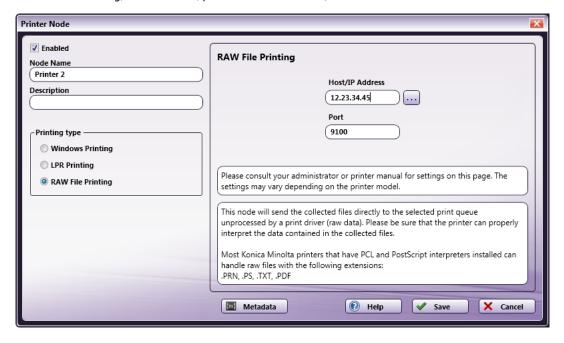
Note: The User Name field will be validated. Special characters, such as {} or [must be escaped with a backslash (\).

The MFP Explorer will search the currently configured network for any MFP devices and then, once a device is selected, auto-populate the fields on the Printer node properties window with the correct information; in this case, any existing settings on the Printer node window will be overridden.

You can also use metadata in the LPR fields by clicking on the **Metadata** button to launch the Metadata Browser window. From the Metadata Browser window, you can drag-drop metadata into the fields provided.

RAW File Printing

For RAW File Printing, as shown below, you need to enter the Host/IP Address and the Port number.



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Enter either a valid host name (i.e., mysubdomain.domain.com) or numeric IP address (i.e., 10.10.220.110) in the Host/IP Address field or click the *ellipsis* button (....) to open the MFP Explorer tool.

The MFP Explorer will search the currently configured network for any MFP devices and then, once a device is selected, auto-populate the fields on the Printer node properties window with the correct information; in this case, any existing settings on the Printer node window will be overridden.

You can also use metadata in the fields by clicking on the **Metadata** button to launch the Metadata Browser window. From the Metadata Browser window, you can drag-drop metadata into the fields provided.



Firewall Note Third-party firewall applications, including some anti-virus software, may block ports used by Dispatcher Phoenix printing

nodes. By default, LPR printing uses port 515 and RAW printing uses port 9100. While the LPR port number is not configurable, the RAW port may differ if the number has been changed. If files fail to print, check the workflow log for the following message:

LPR: " Failed to connect to 'lpr://printer.com:515/Queue' "

or

RAW: " Failed to connect to 'raw://printer.com:9100' "

To allow printing to function properly, please consult your firewall application documentation to either stop blocking ports 515 and/or 9100 or to allow access by the workflow engine process, blox-erl.exe. |

SFTP Out



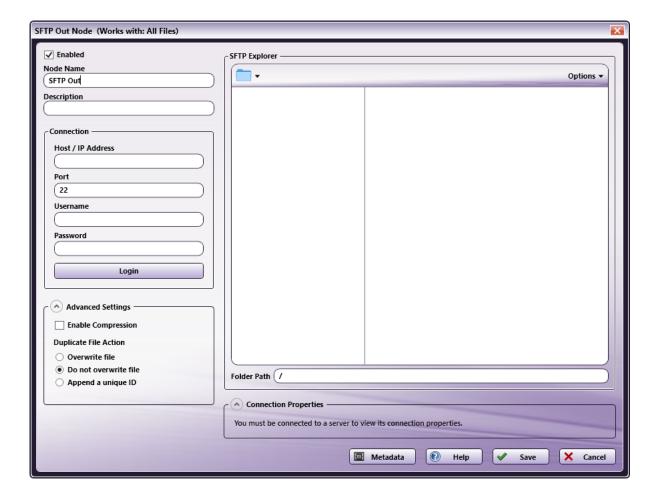
The SFTP Out node is very suitable for transmitting sensitive files as it supports algorithms that help address the following concerns:

- 1. Your data stays confidential throughout the transmission. You wouldn't want valuable or sensitive information such as Personally Identifiable Information (PII), trade secrets, customer lists, key employee salaries, marketing strategies, source codes, etc. falling into the wrong hands.
- 2. Data integrity is upheld. Your data remains unchanged and if it ever undergoes even the slightest accidental or intentional change, you have a way of knowing.
- 3. You are able to verify the authenticity of its source. You will want to make sure it really came from the party who you were expecting to be the sender (and not from an impostor).

Overview of the SFTP Out Node

This node distributes output files to an SFTP server. To configure the **SFTP Out** node, add a node for **SFTP Out** to the workflow canvas and double-click on it.

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- Make sure the Enabled box is checked. When unchecked, this output will be ignored. While the workflow will still validate, documents will not be
 distributed and may be lost.
- In the ${\bf Node\ Name}$ field, enter a meaningful name for the SFTP Out node.
- In the **Description** field, enter a description for the SFTP Out node. This is not required, but it can be helpful when you have more than one output destination. If the description is long, you can hover the mouse over the field to read its entire contents.
- In the **Connection** area, enter the system information for the SFTP server:
 - Host/IP Address Enter the identifying host name for this server or its IP address.
 - Port Enter the port used by the server for SFTP communication (default is 22).
 - **Username** Enter the user name needed to connect to the SFTP server.
 - $\circ~\textbf{Password}$ Enter the password needed to successfully login to the SFTP server.
 - $\circ~$ Select the Login button to test the connection with the SFTP server.
- In the **Advanced Settings** area, customize advanced configuration options, if necessary:
 - Select the Enable Compression box to enable data compression in the SSH connection. By enabling compression, data sent by the server
 will be compressed before sending and decompressed once received.
 - In the **Duplicate File Action** area, choose one of the following actions:
 - Overwrite file Save the new document over the previous document.
 - Do not overwrite file Do not overwrite the file and take no other action.
 - Append a unique ID To keep both versions of a processed file.
- The SFTP Explorer area will auto-populate with the available folders on the server once you have successfully connected to the SFTP server.
 - Folder Path Using the SFTP explorer, you can dynamically create the folder in which Dispatcher Phoenix should output documents.
- Connection Properties displays the algorithms and other specifications applicable to your SFTP transmission.
- Select the **Save** button to keep your SFTP Out settings. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

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Configuring the SFTP Server

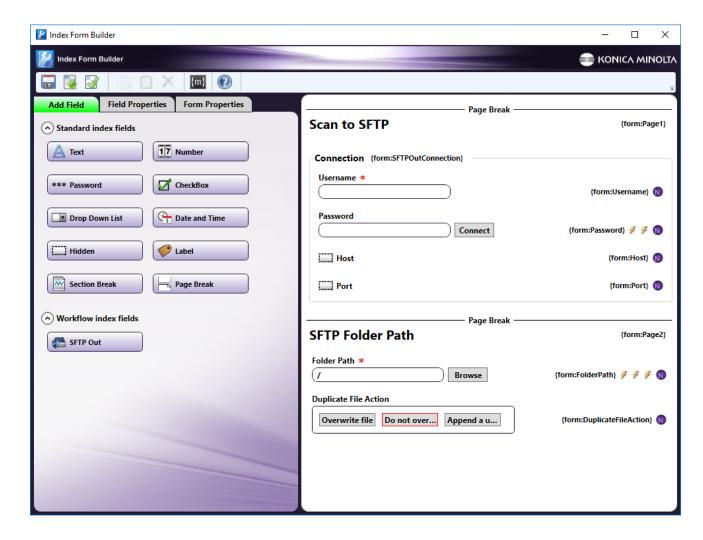
The SFTP Out node supports the following Ciphers, Key Exchange, Message Authentication Code (MAC) and Public Keys for SFTP transmissions:

Ciphers	Key Exchange	MAC	Public Key
AES256_CTR	CURVE25519_SHA256	HMAC_SHA1	SSH_ED25519
AES192_CTR	ECDH_SHA2_NISTP256	HMAC_SHA2_256	ECDSA_SHA2_NISTP256
AES128_CTR	ECDH_SHA2_NISTP384	HMAC_SHA2_512	ECDSA_SHA2_NISTP384
AES256_CBC	ECDH_SHA2_NISTP521		ECDSA_SHA2_NISTP521
AES192_CBC	DH_GROUP1_SHA1		SSH_RSA
AES128_CBC	DH_GROUP14_SHA1		RSA_SHA2_512
BLOWFISH_CBC	DH_GROUP16_SHA512		RSA_SHA2_256
3DES_CBC	DH_GROUP18_SHA512		SSH_DSS

Creating an SFTP Out Index Form

You can create an index form that allows you to log into your SFTP Out server automatically at the MFP. Do the following:

- 2. Make sure that your workflow includes a MFP Panel node and SFTP Out node.
- 3. Open up the Index Form Builder from the MFP Panel node. You should see a SFTP Out button under the Workflow Index Fields area.
- 4. Drag and drop the **SFTP Out** button to the Index Form work area. A Scan to SFTP index form will automatically appear, as in the following illustration:

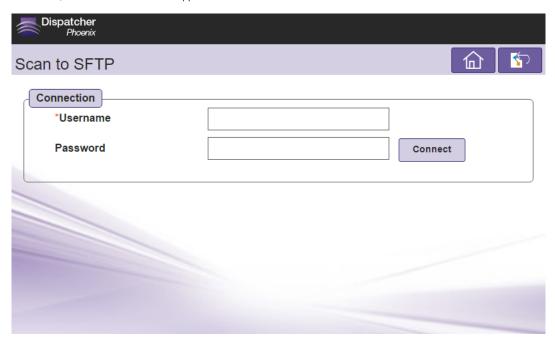


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5. Save and close the Index Form Builder.

SFTP Index Form on MFP

At the MFP, the SFTP Index Form will appear as follows:



Database Browsing

You can also manually configure a query to retrieve data (e.g., list of folders, validation, etc.) from your SFTP Server.

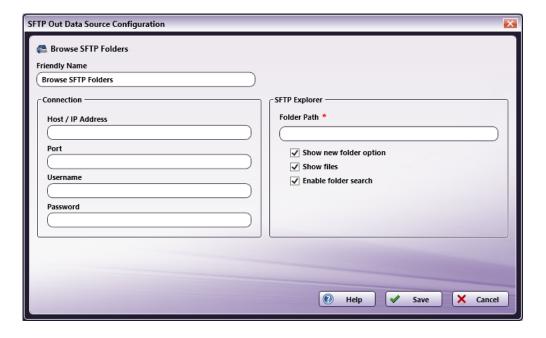
Using the Index Form Builder, do the following:

- 1. Add a new field, such as a drop-down list.
- 2. Define an **On Load** event for the field; then add a **Query**.
- 3. Add an SFTP Data Source from the **Query** list. The options are:
 - Browse SFTP Folders to view a listing of the folders and files available at the specific location on your SFTP server.
 - Connect to SFTP to connect directly to the SFTP server (does not require a folder path).

Creating a Browse SFTP Folder Query

After selecting the **Browse SFTP Folders** from the query drop down, the SFTP Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from your SFTP Server.

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Do the following:

- 1. In the **Host / IP Address** field, enter in the host or IP Address for the SFTP server.
- 2. In the Port field, enter the port number used by the server for SFTP communication (default is 22).
- 3. In the **Username** field, enter in the user name needed to connect to the SFTP server.
- 4. In the **Password** field, enter the password needed to successfully login to the SFTP server.
- 5. In the SFTP Explorer area, enter in the Folder Path of the SFTP root folder that you want displayed at the MFP panel.
 - Show new folder option Check this option to allow the user to create a new folder at the MFP.
 - $\circ~$ Show files Check this option to display files in Dropbox folders at the MFP.
 - $\circ~$ Enable folder search Check this option to enable folder search at the MFP.
- 6. Select the **Save** button to keep your Browse SFTP Folders query settings. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

Creating a Connect to SFTP Query

After selecting the **Connect to SFTP** from the query drop down, the SFTP Data Source Configuration window appears, which allows you to perform specific actions in order to retrieve data from SFTP.

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Do the following:

- 1. In the **Host / IP Address** field, enter in the host or IP Address for the SFTP server.
- 2. In the Port field, enter the port number used by the server for SFTP communication (default is 22).
- 3. In the **Username** field, enter the user name needed to connect to the SFTP server.
- 4. In the **Password** field, enter the password needed to successfully login to the SFTP server.
- 5. Select the **Save** button to keep your Connect to SFTP query settings. You can also select the **Help** button to access online help and select the **Cancel** button to exit the window without saving any changes.

DP Web

Installing DP Web Modules

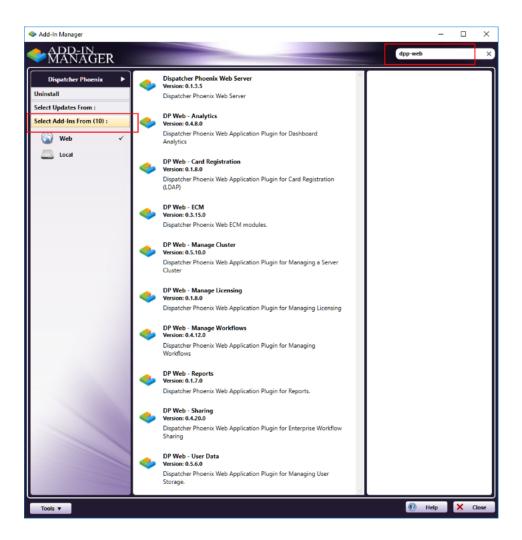
Dispatcher Phoenix Web offers optional Add-In modules for installation, similar to the Dispatcher Phoenix Desktop application. You can choose to install one or multiple optional Web Add-In modules from the Add-In Manager.

Install DP Web Add-Ins

Follow these steps to select and install DP Web Add-In Modules.

- 1. Open Add-In Manager.
- 2. Click on the **Select Add-Ins From** on the left side menu.
- 3. Type **dpp-web** in the search field on the top right corner to filter and show all DP Web Add-In modules.

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4. Hold the Ctrl key and multi-select the Add-In modules that you would like to install.

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5. This will install all selected Web Add-In modules, as well DP Web application packages onto your system.

DP Web Hosting Options

Dispatcher Phoenix Web supports and offers two different options for hosting the web application.

You can choose to host it on either Dispatcher Phoenix's web server for self hosting or you can host it on IIS. Click on the following links to get detailed instructions on both hosting options.

- 1. Self Hosting
- 2. IIS Hosting

Updating the Session Timeout for Dispatcher Phoenix Web

The default length of time before a session timeout for Dispatcher Phoenix Web can be configured. This requires configuring the timeout in a JSON file and in the IIS Manger. To configure the timeout length, do the following:

JSON File Configuration

- 1. Open Windows File Explorer
- $\hbox{\bf 2. Navigate to C:$\program Files\\\fine Minolta\\\fine Dispatcher Phoenix Web. }$
- 3. Open the file system.json in an editor program, such as Notepad.
- 4. Add following code at the end of "xmpp_server" section in the json file:

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```
}
```

- 5. Save the file and close the editor.
- 6. Restart IIS Web Server.

IIS Manager Configuration

- 1. Open the the IIS Manager. Then, select **Application Pools** in the "Connections" Panel.
- 2. From the list of the Application Pools, select the "DPWebPortalAppPool" option.
- 3. In the "Actions" panel, under the "Edit Application Pool" section, select Advanced Settings...
- 4. On the Advanced Settings window, for the Process Model, Change the **Idle Timeout(minutes)** to the same time as it is configured in the System.json file.
- 5. Select the **OK** button.
- 6. In the "Actions" panel, under the "Application Pool Tasks" section, Stop, then Start the DPWebPortalAppPool.
- 7. In the "Actions" panel on the right, select the root IIS server and select **Restart**.

CAC/PIV Card Authentication

Dispatcher Phoenix Web supports the use of PIV Authentication for user login. Dispatcher Phoenix Web uses the Universal Principal Name (UPN) taken from the Subject Alternative Name (SAN) field of the Client Certificate from the CAC/PIV Card to search for a user in the LDAP Directory and allow or deny access based on the information found.

Important! To ensure that users are able to login properly, make sure the following options have been configured for Dispatcher Phoenix prior to enabling the PIV authentication:

- Enable LDAP for Dispatcher Phoenix
- Make sure to configure and test your LDAP settings for Dispatcher Phoenix

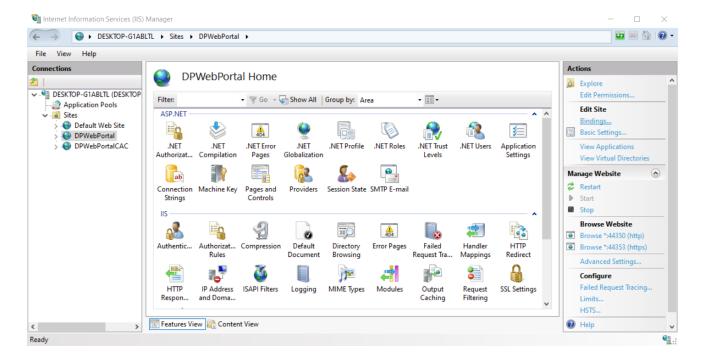
Caution! Dispatcher Phoenix recommends that any trust certificates that are going to be installed on a production environment are signed by a publicly trusted certificate authority (CA).

Enabling PIV Authentication in Dispatcher Phoenix Web

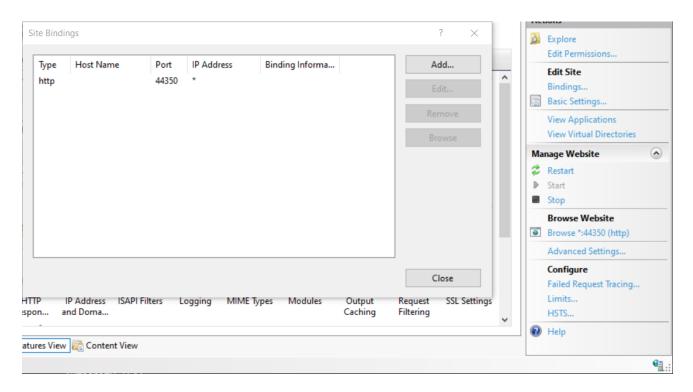
Dispatcher Phoenix Web supports PIV Authentication for customers. In order to enable and set up PIV Authentication, do the following:

- 1. In the IIS Manager, select **DPWebPortal** under the Sites folder in the "Connections" Panel.
- 2. In the "Actions" panel, under the "Edit Site" section, select **Bindings...**.

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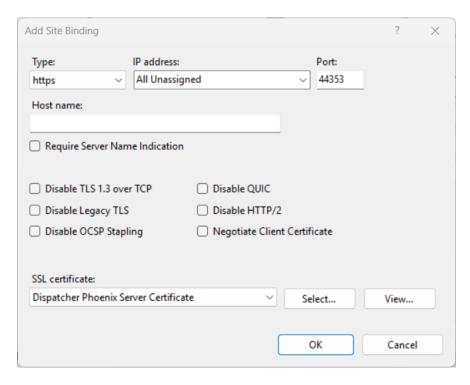
3. Select Add to add a new binding.



4. Do the following:

- $\circ~$ Select $\mbox{\bf https}$ from the "Type" dropdown.
- Enter the port you would like to use (such as 44353).
- At the bottom, select the SSL Certificate dropdown and select the signed SSL Certificate from the Trusted Certificate Authority.

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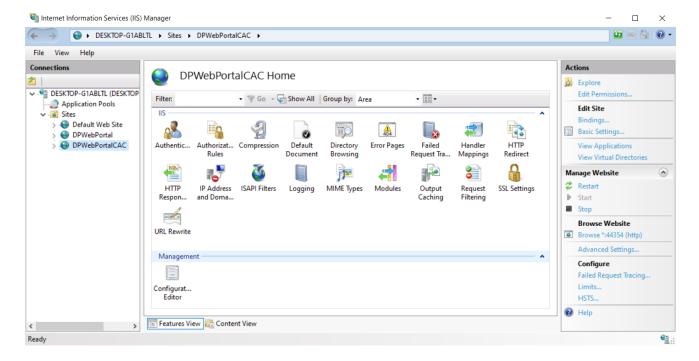


Important! Make sure the Dispatcher Phoenix server has an SSL Root level CA Certificate that has been signed by a Certificate Authority (CA).

5. Select the **OK** button.

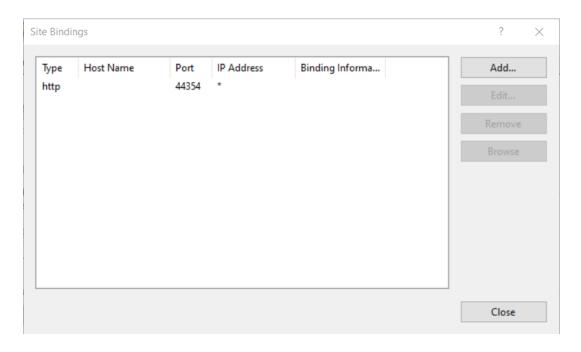
Note: The following steps are only required if you are configuring a CAC/PIV environment. Otherwise, you can continue setup at **the next section**.

6. In the IIS Manager, select **DPWebPortalCac** under the Sites folder in the "Connections" panel.



7. In the "Actions" panel, under the "Edit Site" section, select **Bindings...**.

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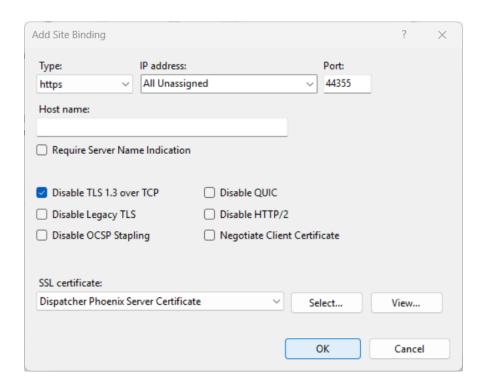
8. Do the following:

• Select **HTTPS** from the "Type" drop-down menu.

Important! Make sure the Dispatcher Phoenix server has an SSL Root level CA Certificate that has been signed by a Certificate Authority (CA).

- Enter the port you would like to use (such as 44355).
- · At the bottom, select the SSL Certificate dropdown and select the signed SSL Certificate from the Trusted Certificate Authority.
- Select the Disable TLS 1.3 over TCP checkbox. This is required for client certificate authentication in Windows environments.

Important! If you are configuring these settings on a Windows Server 2022 or Windows 11 environment, this step is required for client certificate authentication.

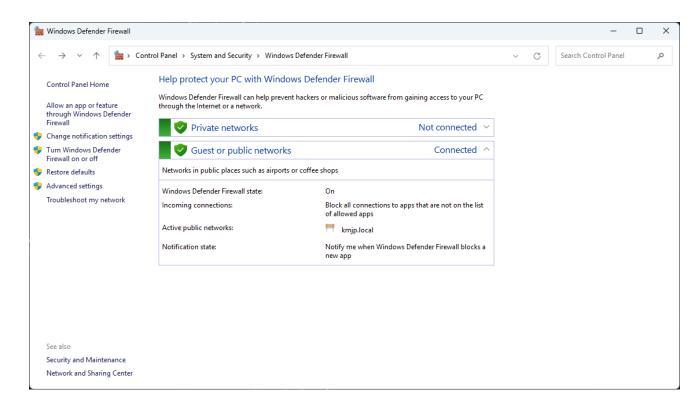


9. Select the **OK** button.

Konica Minolta 1274 / 1597

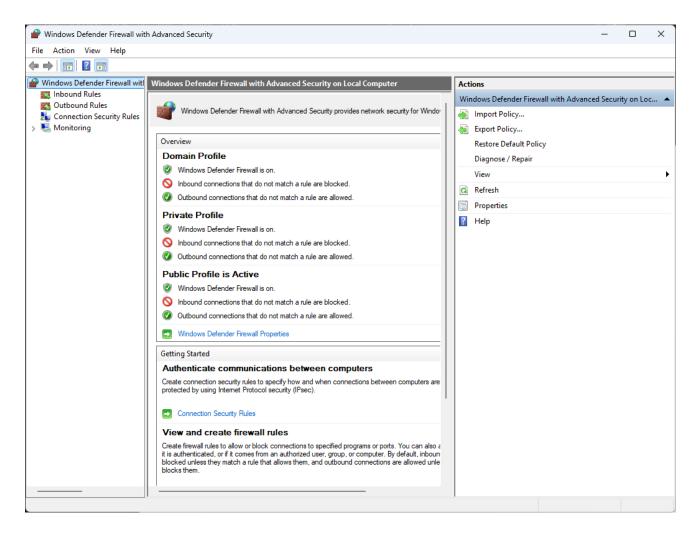
Updating Windows Firewall to Allow Inbound Connections to Dispatcher Phoenix Web

1. Use the Windows search bar to search for Firewall. Open Windows Defender Firewall.



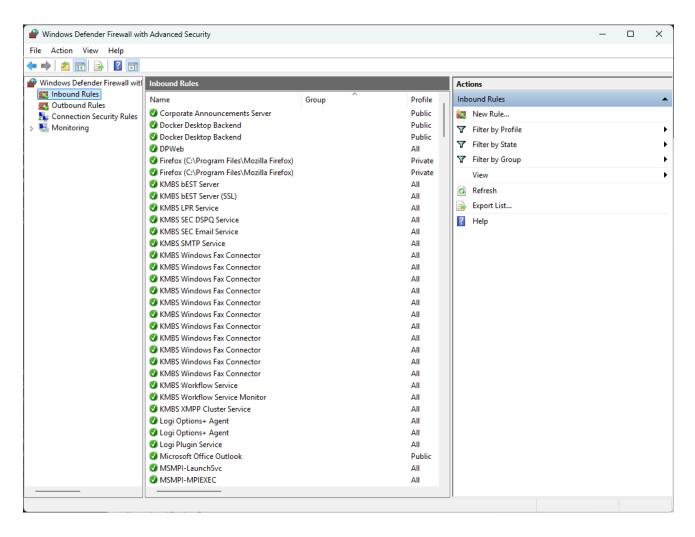
2. In the panel on the left, select **Advanced Settings**.

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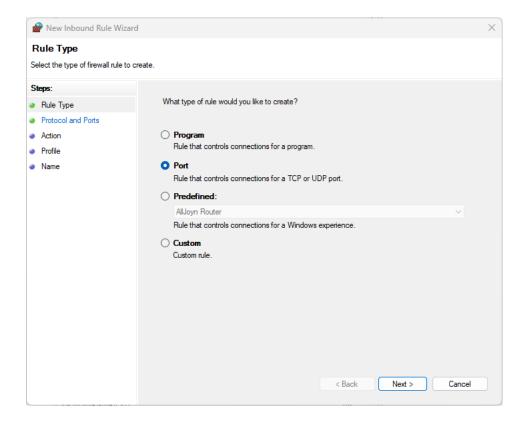
3. In the panel on the left, select Inbound Rules.

Konica Minolta 1276 / 1597

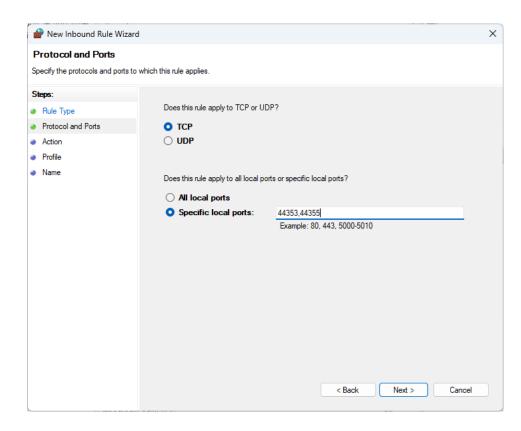


4. In the Actions panel on the right, select **New Rule**.

Konica Minolta 1277 / 1597



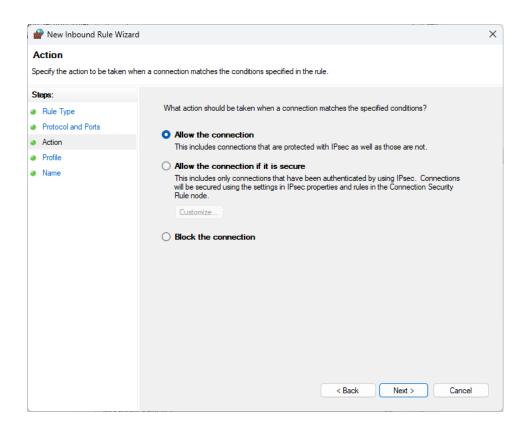
- 5. Select the **Port** option. Then select the **Next** button.
- 6. Ensure **TCP** is selected. Then select the **Specific local ports** option. Then, enter the ports you configured for the Dispatcher Phoenix Web HTTPS bindings, separated by a comma.



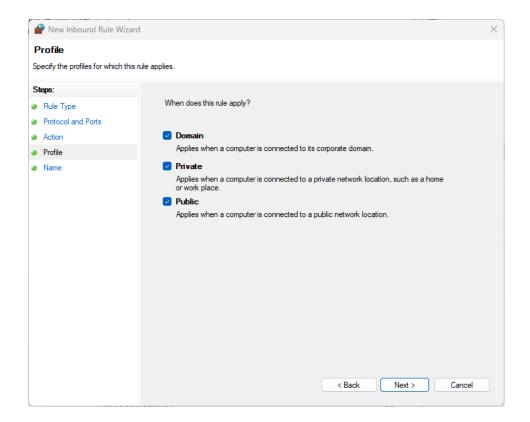
7. Select the **Next** button.

Konica Minolta 1278 / 1597

8. Select **Allow the connection**. Then select the **Next** button.

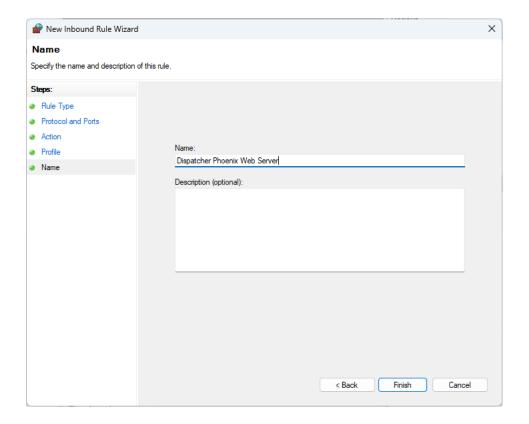


9. Select the Domain, Private, and Public options. Then select the Next button.



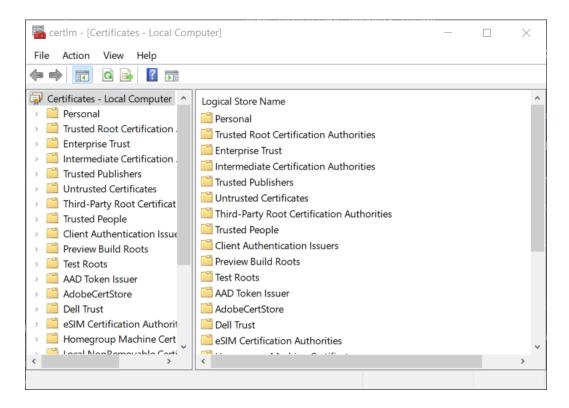
10. Enter a name for the new Inbound Rule. Then, select the ${\bf Finish}$ button.

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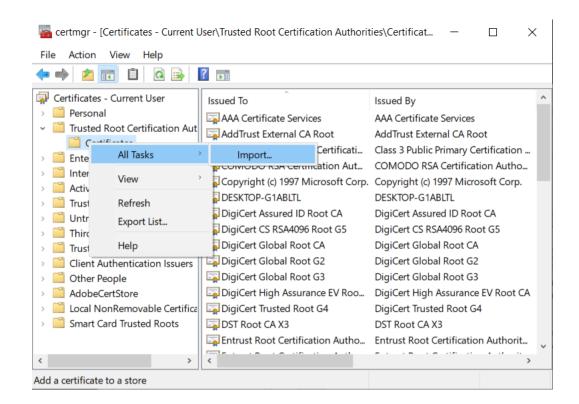
Configuring CAC/PIV Authentication in Dispatcher Phoenix Web

- 1. Make sure you have your CAC/PIV Root SSL Certificate from your HID card user available. Copy the certificate file to the Desktop on your Dispatcher Phoenix server.
- 2. In the Windows search bar, search for "Manage computer certificates" and open the Certificate Manager.



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- 3. In the "Certificates Local Computer" area on the left, expand Trusted Root Certifications Authority.
- 4. Right-click Certificates and select Import.

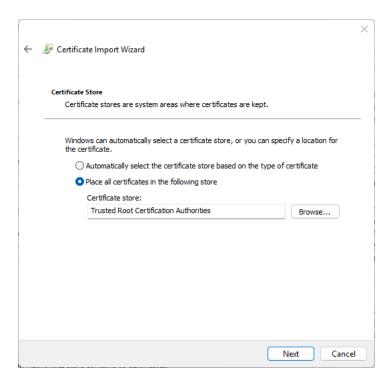


5. This will open the Certificate Import Wizard. Click **Next**.

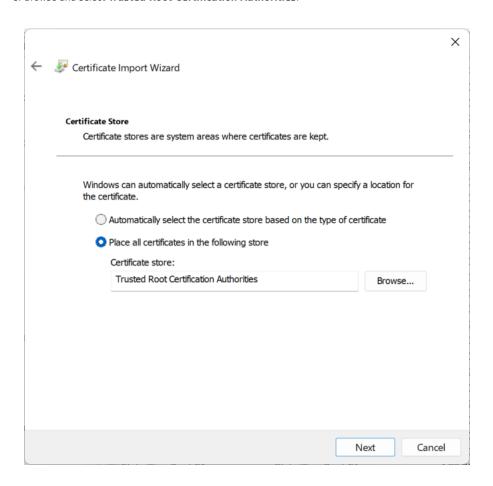


- 6. Select the Browse button. Use the browser to select the Root CA Certificate from your desktop. Then, click Next.
- 7. Select the ${f Place}$ all ${f certificates}$ in the following store option.

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8. Browse and select Trusted Root Certification Authorities.



- 9. Select the **Next** button and continue importing the certificate. Close the Certificate Manager.
- $10. \ Using \ Windows \ file \ explorer, \ navigate \ to \ \texttt{C:\Program Files\Konica Minolta\Dispatcher Phoenix Web.}$

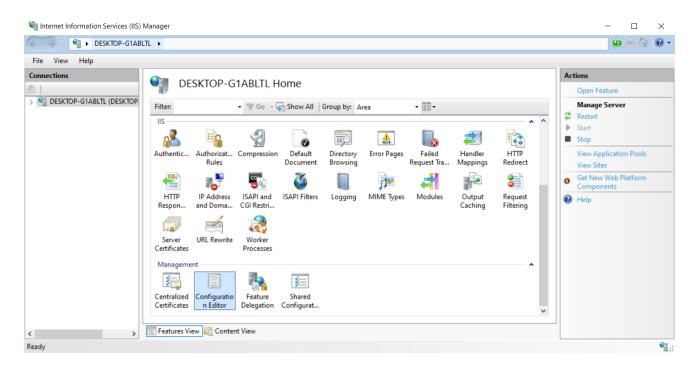
Konica Minolta 1282 / 1597

- 11. Open the piv-auth.json file in a text editor.
- 12. Make the following changes:
 - Change the "enable" value from "no" to "yes".
 - In the "signinMode" field, do one of the following:
 - Set the value to Dual, which allows end users to login to Dispatcher Phoenix Web using both their AD Credentials and their CAC/PIV Card.
 - Set the value to **Card**, which allows end users to login using only their CAC/PIV Card. You can also edit the "signinLabel" field to change the label of the CAC/PIV sign in button.
 - Change the "host" value to the IP address of your Dispatcher Phoenix Server. Change the "port" value to match the port you assigned to DPWebPortalCAC Site in IIS. If you do not need to specify a port to access the DPWebPortalCac Site (e.g. the DPWebPortalCac Site is configured with real host name), enter a value of 0.

The file should look something like this:

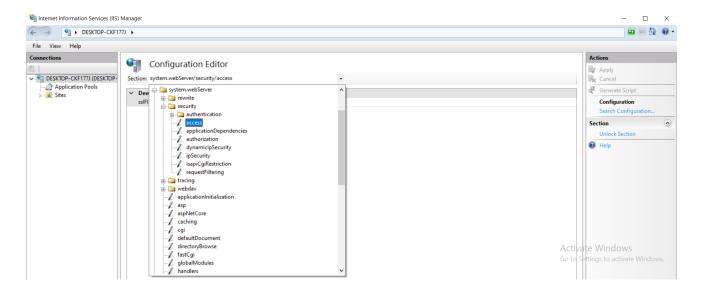
```
{
    "pivAuth": {
        "enable": "yes",
        "signinMode": "dual",
        "signinLabel": "Sign in with PIV / CAC Card",
        "host": "10.10.220.40",
        "port": 44355
}
```

- 13. Save and close the file.
- 14. Launch the IIS Manager.
- 15. Select the server name in the "Connections" panel on the left side.
- 16. Under the "Management" section, double-click the Configuration Editor.

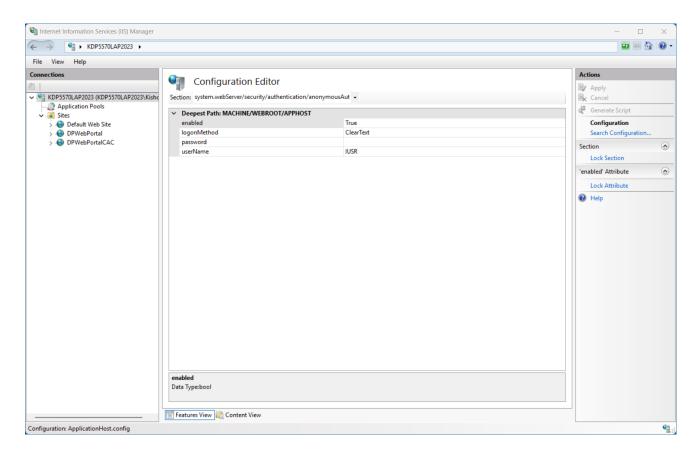


17. Open the Section dropdown, located at the top of the window. Navigate to system.webServer > security > access, as in the following illustration:

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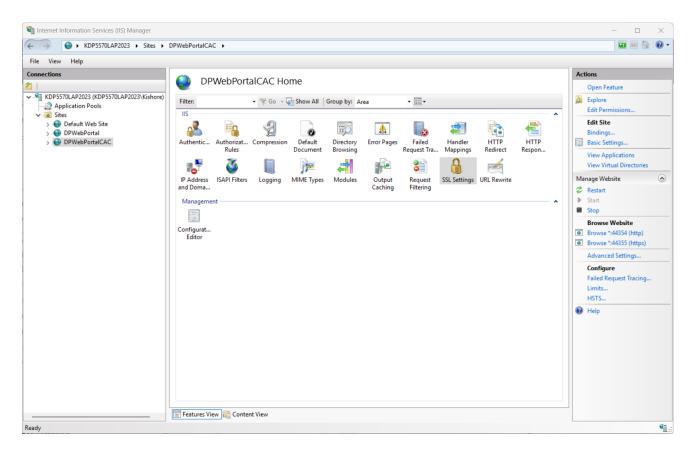


- 18. In the "Actions" panel on the right, expand the Section dropdown and select Unlock Section.
- 19. Open the Section dropdown again, located at the top of the window. Navigate to system.webServer > security > authentication > anonymousAuthentication, as in the following illustration:

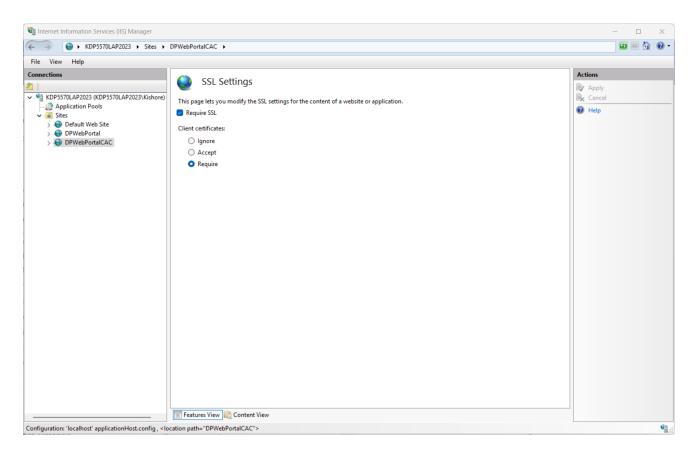


- 20. In the "Actions" panel on the right, expand the Section dropdown and select Unlock Section.
- 21. In the IIS Manager, select **DPWebPortalCAC** under the Sites folder in the "Connections" Panel.
- 22. Double click on SSL Settings.

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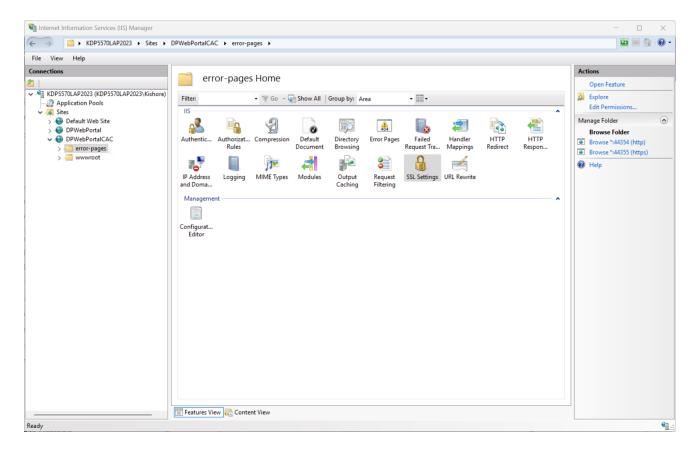


23. Select the **Require SSL** checkbox and then the **Require** client certificates option.



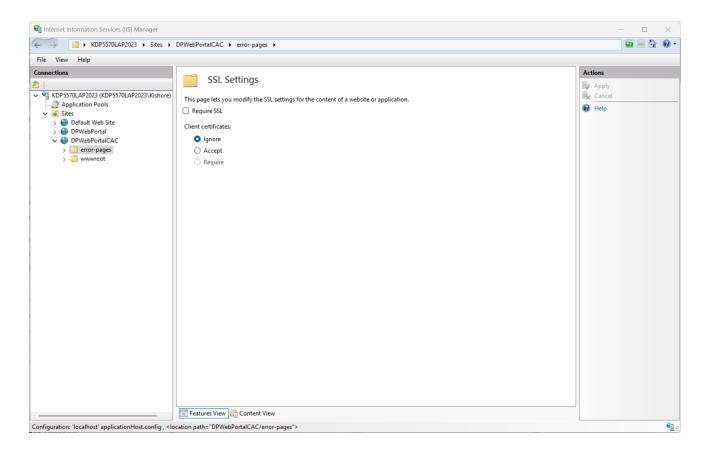
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- 24. Select **Apply** in the "Actions" panel on the right.
- 25. In the IIS Manager, select DPWebPortalCAC site under the Sites folder in the "Connections" panel.
- 26. Select the "error-pages" folder on the left. Then, double click on **SSL Settings**.



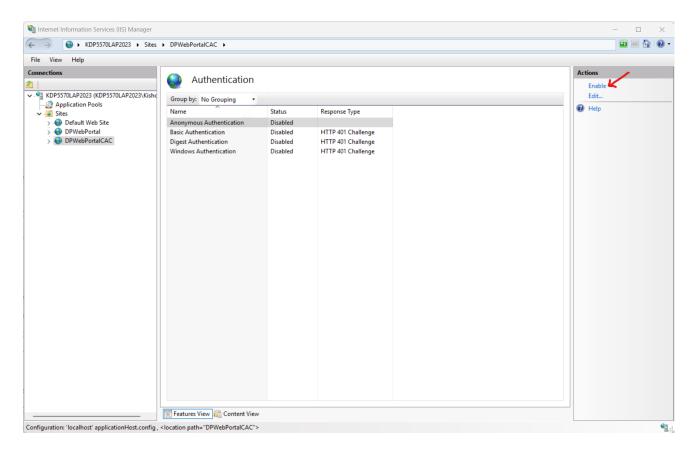
27. Select Ignore Client certificates and deselect the Require SSL option.

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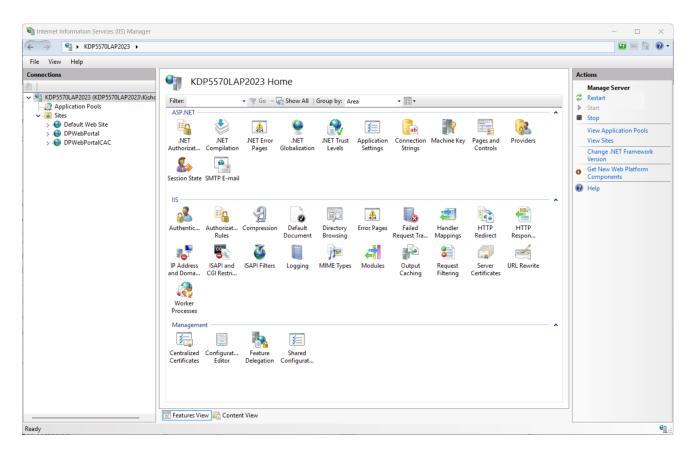


- 28. Select $\mbox{\bf Apply}$ in the "Actions" panel on the right.
- $29. \ \, {\sf Select} \, \, \textbf{DPWebPortalCAC} \, \, \textbf{site} \, \, \textbf{under the Sites folder in the "Connections" panel}.$
- 30. Double click on **Authentication**.
- 31. Select **Anonymous Authentication**. Then, select **Enable** in the "Actions" panel on the right.

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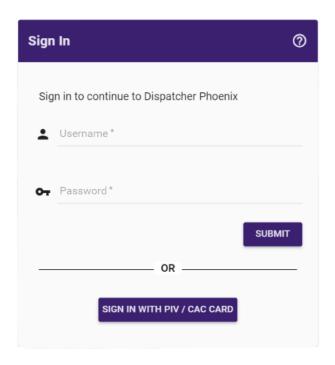
32. Now, select the **root IIS server**, and select **Restart** in the "Actions" panel on the right.



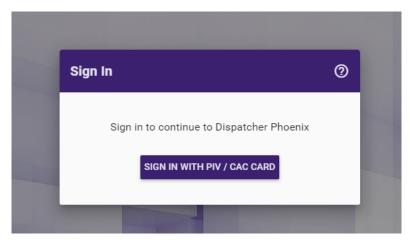
Konica Minolta 1288 / 1597

Testing CAC/PIV Authentication Using Dispatcher Phoenix Web

To ensure the setup and configuration has been successful, navigate to Dispatcher Phoenix Web using https protocol and port 44353. For example, the URL would look like "https://your-ip-address:44353". With the "signinMode" set to dual, the user will be able to sign in with a **Username** and **Password** or the **Sign in with CAC/PIV Card** button, as in the following illustration:



If you have set the "signinMode" value to card, the option to Sign in with CAC/PIV Card will be the only option, as in the following illustration:



Setting Up an IIS Hosting Environment

As of Dispatcher Phoenix 8.3, all necessary packages for hosting Dispatcher Phoenix Web on Windows with IIS are downloaded automatically. This section describes all the steps required for you to **manually** set up a hosting environment for Dispatcher Phoenix Web on Windows with IIS, such as when setting up PIV/CAC Card Authentication.

Note: Dispatcher Phoenix automatically sets up both http and https (recommended) servers.

Supported Operating Systems

The following operating systems are supported for hosting DP Web on IIS:

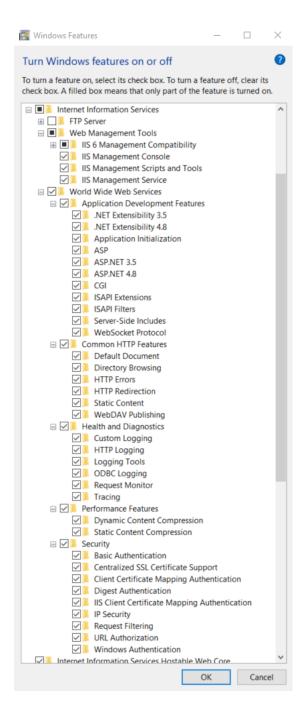
- Windows 10
- Windows 11 (Recommended)

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- · Windows Server 2016
- Windows Server 2019
- Windows Server 2022 (Recommended)

IIS Configuration on Windows Desktop Operating Systems

- 1. Navigate to Control Panel > Programs > Programs and Features.
- 2. Click **Turn Windows features on or off** on the left side of the screen.
- 3. Open the group for Internet Information Services and Web Management Tools.
- 4. Check the box for IIS Management Console.
- 5. Check the box for World Wide Web Services and ensure that all checkboxes within World Wide Web Services are checked, or customize the IIS features as needed.

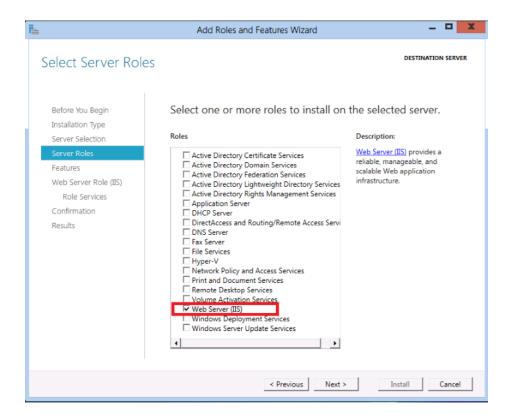


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IIS Configuration on Windows Server Operating Systems

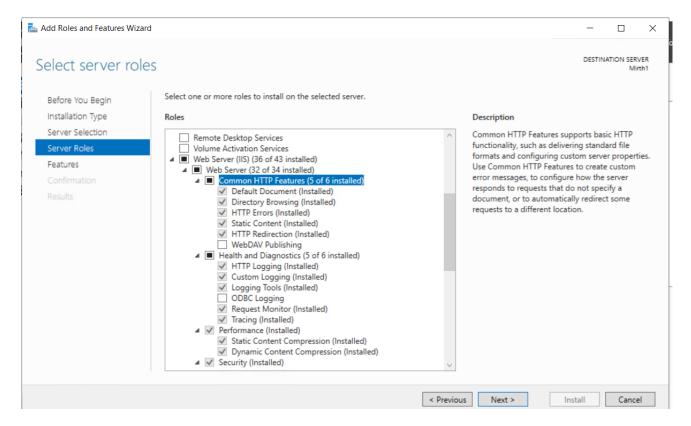
For server operating systems,

- 1. Use the Add Roles and Features wizard via the Manage menu or the link in Server Manager.
- 2. On the Server Roles step, you will be asked to select one or more server roles. Scroll down in the Roles list, and make sure to check the Web Server (IIS) checkbox as shown below:



- 3. Click **Next** to proceed to the next step, which enables you to select additional specific features to install on the server. Click **Next** again and proceed to the next step.
- 4. The next step displays some introductory information about the Web Server (IIS) role. Click **Next** again and proceed to the next step. Now you should be at a step that looks like the following:

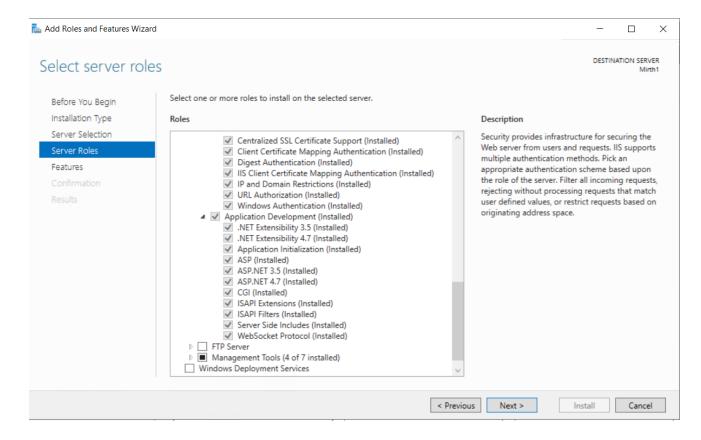
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Ensure that all checkboxes within Web Server are checked, or customize as needed.

5. Several default sub-features for IIS have already been turned on because you previously selected the Web Server (IIS) server role. However, you will need to enable ASP.NET 4.5 or later to run on IIS, so you will need to enable some additional IIS related features. Scroll down in the Role services list until the Application Development node is showing. This node is collapsed initially, so click on the node and expand it so that its children are showing:

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6. The Application Development node is where you enable ASP.NET integration with IIS. Note that there are a few checkboxes in the feature list with similar names. The checkbox that is of interest for this setup is:

 $\mbox{ASP.NET 4.* (depending on your Windows Server OS) - This option enables ASP.NET to run on IIS. } \\$

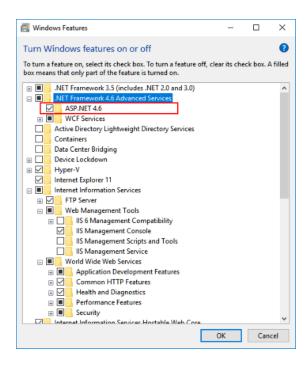
7. Click on **Next** until you see the **Install** button, at this point, click **Install** to accept the changes and install full ASP.NET support on Windows Server.

Register ASP.NET with IIS

After installing IIS, we need to make sure ASP.NET is properly registered with IIS. This is an important step and required for other components/modules of Dispatcher Phoenix Web to work correctly, especially with Batch Indexing.

- 1. On the Windows Server OS, the ASP.NET integration with IIS happens automatically.
- 2. On Windows 10 and Windows 11, make sure to enable the ASP.NET feature as shown in the following picture.

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DP Web Prerequisites for IIS

For the Dispatcher Phoenix Web application to work in IIS, the following additional IIS modules need to be installed

1. Download and install ASP.NET Core 6.0 Runtime (v6.0.3) and the Windows Hosting Bundle.

Download ASP.NET Core 6.0 Runtime

Download Windows Hosting Bundle

2. Install IIS Module: URL Rewrite

Download and install the URL Rewrite module to your system architecture.

Download URL Rewrite Module

Host DP Web Application in IIS

At this point, you are ready to create a new website for DP Web in IIS. The following steps will walk you through creating and configuring DP Web in IIS.

- ${\bf 1.\ Open\ Internet\ Information\ Services\ (IIS)\ Manager}.$
- 2. In IIS Manager, right-click on **Sites** and open the **Add Website** Window.

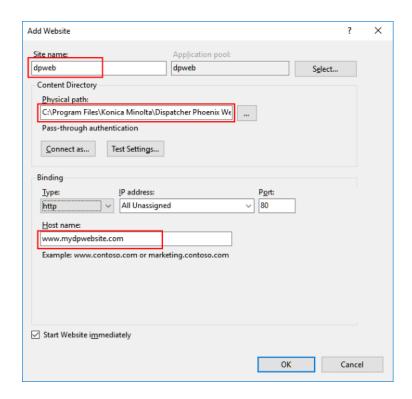


3. Configure the website, provide a **Site name**, and set the **Physical path** to the application's deployment folder. Provide the **Binding** configuration and create the website.

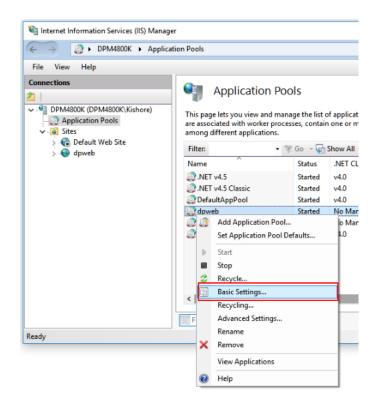
Add-In Manager publishes all DP Web application files to C:\Program Files\Konica Minolta\Dispatcher Phoenix Web\wwwroot

Make sure to browse and select this folder as your Physical path.

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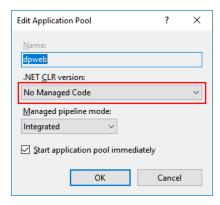


4. In the Application Pools panel, open the Edit Application Pool window by right-clicking on the website's application pool and selecting **Basic Settings...** from the pop-up menu.

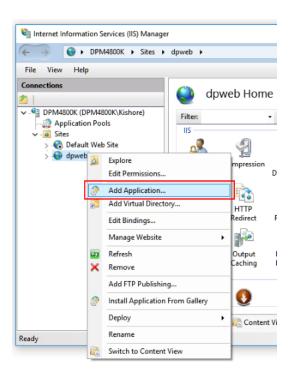


5. Set the .NET CLR version to **No Managed Code**. DP Web runs in a separate process and manages the runtime.

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6. Right-click on the newly created dpweb website and choose the Add Application option from the context menu that appears.



7. Configure the application, provide an Alias, and set the Physical path to the application's deployment folder.

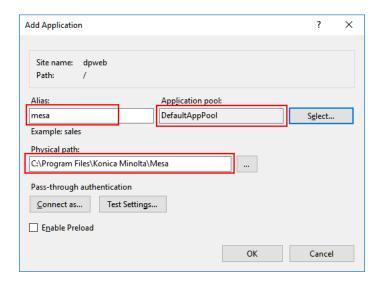
Always set Alias name as **mesa**, do not change this name.

Add-In Manager publishes all mesa application files to C:\Program Files\Konica Minolta\Mesa

Make sure to browse and select this folder as your **Physical path**.

Set the .NET CLR version to either **DefaultAppPool** or latest .NET version something like .**NET v4.5**

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Note: If you change the default identity of the application pool from ApplicationPoolIdentity, verify the new identity has the required permissions to access the application's folder used in the above steps.

Access DP Web

Once Dispatcher Phoenix Web is successfully installed, it creates a Dispatcher Phoenix Web shortcut icon on the Desktop. You can double-click on the following icon on your Desktop to access Dispatcher Phoenix Web:



You can access DP Web from other workstations in the same network by using the IP address of the DP Web Server, for example:

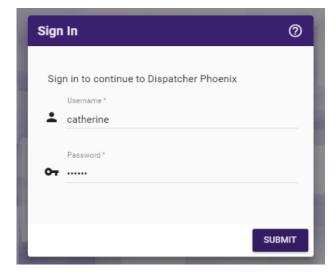
http://10.10.220.20:44350

Using DP Web

Once you are ready with either self-hosting or IIS hosting environment, open up a web browser and use an IP address or host name to access DP Web.

Logging In

To access DP Web features and functions, you must first log in with your corporate username and password.



Do the following:

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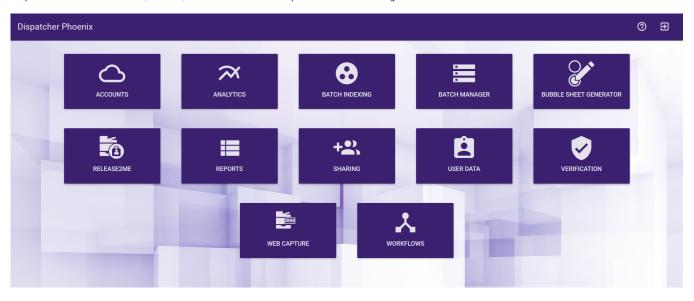
- 1. Enter your credentials in the Username and Password fields.
- 2. Select the **Submit** button.

Important!

- When logging in with Microsoft Entra ID, **Workflow Services Manager** must be set up first to accommodate it. Once it is set up, you will be able to type your Entra ID into the User Name field.
- When using a Microsoft login, it will be available in the drop-down menu.

Navigating

When you first log into DP Web, you are presented with a row of buttons that allow you to access various features that allow you to manage your Dispatcher Phoenix workflows, servers, and users for the enterprise. See the following illustration:

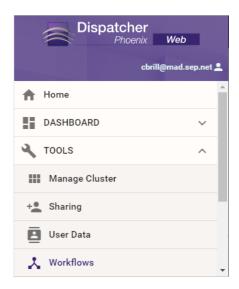


To access any of these features, click on the corresponding button.

- Analytics View analytics about your system/cluster.
- Manage Cluster Manage/add servers for failover and process offloading.
- **Sharing** Share workflows to specific users and user groups.
- User Data Display/edit user profile information.
- Web Capture Launch the Web Capture URL in a separate tab. This tile attempts to login to **Dispatcher Phoenix Web Capture** on a web browser, using the same credentials used by the current user to login to Dispatcher Phoenix Web.
- Workflows Start, stop, and pause workflows.

In addition, all DP Web pages include a slide out menu that provides access to these features. Click on the navigation drawer icon to access the slide out menu, as in the following illustration:

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Enterprise

To ensure maximum up-time for enterprise-level deployments, Dispatcher Phoenix offers important features for the enterprise, including:

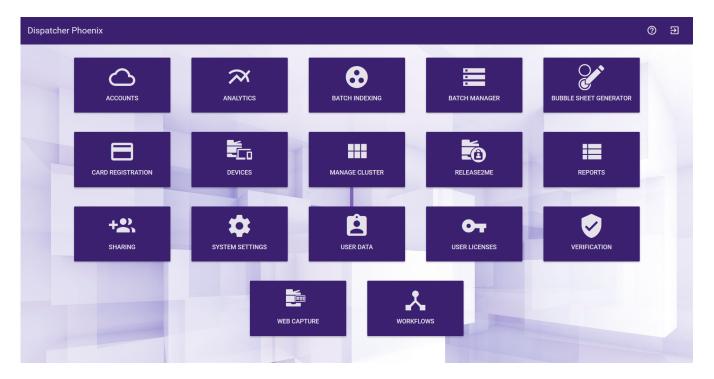
- Failover A failover server that is used if the primary server goes down ensures maximum up-time. When a failure occurs on one server in a cluster, resources are redirected and the workflow is redistributed to another server in the cluster, which has been licensed as a failover server. All failover servers can function as a primary for 30 days, after which the failover acting as primary will stop functioning (if a licensed primary server is unavailable). If a primary server becomes permanently offline and the failover server needs to become the permanent primary server, a manual license transfer is necessary to move the primary license to the failover server.
- Load balancing For a large deployment of devices, load balancing is optimal for distributing requests to servers. With Dispatcher Phoenix, multiple primaries can be joined together for automatic load balancing in which case jobs move from one primary to another based on backload and a user-specified threshold.
- OCR offloading To speed processing time, intensive processing tasks can be offloaded to other servers. Dispatcher Phoenix can be set up to offload MFP Connectivity, Mobile Connectivity, Web Connectivity, and Workflow Processing.
- · Workflow Sharing With the fine-grain sharing control feature, specific users or groups of users can be assigned workflows.
- Workflow Control Admins can run, stop, and pause workflows without needing Dispatcher Phoenix installed on your system.
- Dashboard Graphical online Dashboard provides quick snapshot on server/user activity.

These features are available via the Dispatcher Phoenix Web application.

Admin Users

Certain features can only be accessed by users who are considered administrators. If you have administrative access to Dispatcher Phoenix Web, your home page will resemble the following illustration:

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An administrator falls under one of the following titles:

- Administrators
- · Domain Admins
- Administrateurs
- Administradores
- Administratoren

To add another administrative group besides the ones listed above, follow the steps below:

- 1. Navigate to the install directory of Dispatcher Phoenix Web (e.g. C:\Program Files\Konica Minolta\Dispatcher Phoenix Web)
- 2. Open the "config.json" file, it should look resemble the following:

- 3. Edit the **memberOf** entry to include any additional groups that should be considered administrators. Ensure that there is a comma between any additional entries.
- 4. Restart the KMBS Dispatcher Phoenix Web Server service (i.e. dp-web) by following these steps:
- 5. Open the run dialog (windows key + R).
- 6. Type services.msc and click OK.
- 7. Right-click on KMBS Dispatcher Phoenix Web Server and click Restart.

If a group cannot be added to this list of administrators, and you would like to add users individually as admins for Dispatcher Phoenix Web, you can follow the procedure below:

Important! Do this as a last resort and only in cases where it is not possible to use a user's groups.

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1. Navigate to the "wwwroot" directory inside the install directory of Dispatcher Phoenix Web (e.g. C:\Program Files\Konica Minolta\Dispatcher Phoenix Web\wwwroot)

```
{
    "users": ""
}
```

2. Open the "user-whitelist.json" file. It should look like the following: { "users" : "" }

```
{
    "users": "admin1, admin2, admin3"
}
```

- 3. Update the "users" value with a comma delimited list of usernames that should be whitelisted. { "users" : "admin1 , admin2 , admin3" }
- 4. Restart the KMBS Dispatcher Phoenix Web Server service (i.e., dp-web).

Troubleshooting

If you believe you are an administrator but can't find the proper title in Dispatcher Phoenix Web, or you encounter a message such as the following:

Administrator Doesn't have Access to Administrator Modules in DP Web

follow these troubleshooting steps below:

- 1. Check the groups that Dispatcher Phoenix Web has detected the user belongs to by selecting **User Data** from the Dispatcher Phoenix Web main page. The groups that have been detected by Dispatcher Phoenix Web for the user will be listed next to **Groups** under **User Profile**.
- Check the list of the groups that Dispatcher Phoenix Web considers administrators by default. If the user is not listed as a member of one of these groups, follow the steps on that page to add additional groups to the list of administrator groups or to whitelist this user as an administrator.

Requirements

 $\label{eq:def:DP} \mbox{ \ensuremath{\mathsf{DP}} Web is supported on all \ensuremath{\mathsf{HTML5}} \ \mbox{supported browsers, including:} \\$

- Chrome
- Firefox
- Internet Explorer 10+
- Microsoft Edge
- Safari for Mac

Accounts

Use the Dispatcher Phoenix Web Accounts app to authorize and manage your accounts for the following Cloud and on-premise applications for use in Dispatcher Phoenix workflows:

- Dropbox
- Box
- Google Drive
- OneDrive
- OneDrive for Business
- SharePoint Online
- Microsoft Exchange Online
- Google Mail
- Epic (on-premise)
- DocuSign
- · Dispatcher Stratus
- · Microsoft Teams

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Once you authorize an account here in Dispatcher Phoenix Web, the account will be accessible in the associated Dispatcher Phoenix connector node.

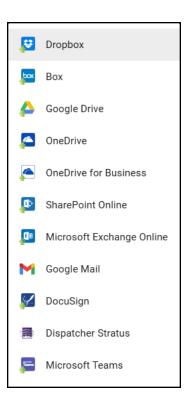
Accessing the Accounts App

From Dispatcher Phoenix Web, select the Accounts button or the Accounts option from the slide out menu. The Accounts app displays.

Adding Accounts

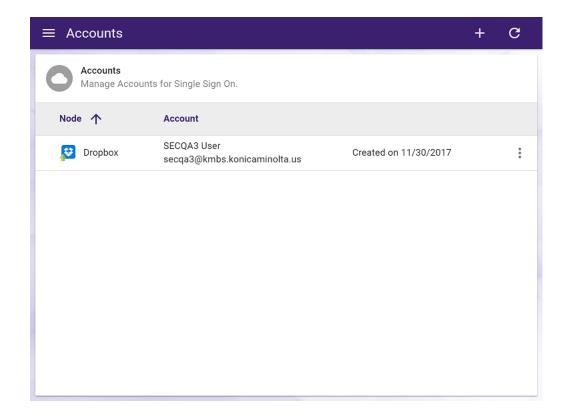
To add an account, do the following:

1. Select the + icon at the top-right of the navigation bar. A list of available connectors be displays, as shown in the following illustration:



- 2. Select the connector you would like to add. A pop-up window appears.
- 3. Follow the prompts to allow Dispatcher Phoenix to access your account.
- 4. The account now appears on the Accounts page. Once you have added an account, you can configure the connector for use in workflows. See the following illustration for an example:

Konica Minolta 1302 / 1597



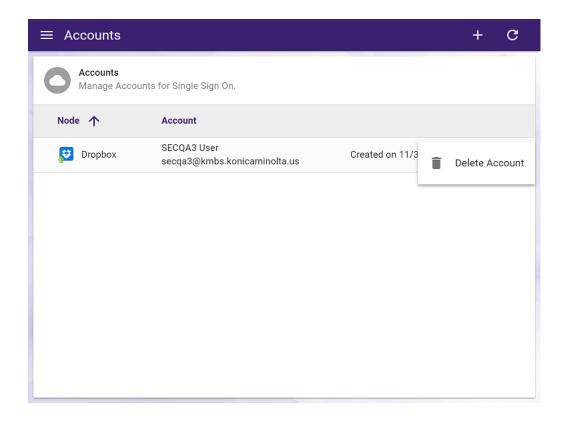
Note: In order to add an Epic account, you must first update your System Settings

Deleting Accounts

To delete an account, do the following:

1. Choose an account to delete and select the associated Ellipses button on the right side of the screen. A menu appears, as in the following illustration:

Konica Minolta 1303 / 1597



- 2. Select Delete Account.
- 3. On the Confirm Delete Account pop-up window, select **Delete**.

Primary Accounts

If you have multiple accounts with the same type of connector, the first account you add will be designated as the primary account. The primary account is marked with a star icon. The benefit of having a primary account is that when you log into the MFP and access your workflow, you can access your primary account automatically through single sign-on. You can choose which account to enable as the primary and you are not required to have a primary account. In order to toggle between multiple accounts while at the MFP, you must disable primary accounts.

Enabling Primary Accounts

- 1. Choose which account you would like to make the primary account and select the ellipses button on the right side of the screen.
- 2. Select Enable Primary.
- 3. On the Confirm Enable Primary Account pop-up window, select Yes.

Disabling Primary Accounts

- 1. Choose which account you would like remove as the primary and select the ellipses button on the right side of the screen.
- 2. Select Disable Primary.
- 3. On the Confirm Disable Primary Account pop-up window, select **Yes**.

A Note on Changing Account and Team Member Statuses in the Dropbox App

Changing a Dropbox account or team member status within the Dropbox app does not automatically update the associated account in Dispatcher Phoenix Web. To update the account in Dispatcher Phoenix, you must delete and then re-add the account in Dispatcher Phoenix Web. Once the Dispatcher Phoenix Web account updates, any connected Dispatcher Phoenix nodes (and any attached index forms) update automatically.

This situation occurs when any of the following transactions are executed in the Dropbox app:

- · Add a team member
- Delete a team member
- Suspend a team member

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Devices Tool

Dispatcher Phoenix Web's Devices Tool enables administrators to organize their devices as well as discover devices, create groups, and register and/or edit/delete multiple devices or groups without needing to stop a running workflow. To get started, do the following:

- 1. Log into **Dispatcher Phoenix Web** with your Windows user credentials.
- 2. Select the **Devices** tile.

The following illustration shows the Devices tile:



The **Devices Home Page** lists any devices that have already been discovered, added, or registered. Any discovered devices not associated with a group appear in the **No Group** category. See the following illustration for an example:



Using the Toolbar

The Devices toolbar provides a variety of buttons that allow you to manage and register your devices. Many toolbar buttons access drop-down menus listing the options they provide as well as keyboard shortcuts to the options. The toolbar appears in the following illustration:



The following buttons appear on the Devices toolbar:

- **DISCOVERY** Automatically detect and find all devices on the network.
- CREATE GROUP Define groups of devices for easy visualization and management, including groups for the Web Capture node.
- ADD Manually add an individual device for registration. The Import Devices option accesses the Bulk Import Devices Tool.
- EDIT Modify app settings and authentication options for selected devices. This button also provides options to change the group to which a device is assigned as well as rename groups.
- **DELETE** Remove selected devices from the list and/or remove selected devices from groups.
- REGISTER Register Dispatcher Phoenix on selected devices.
- UNREGISTER Unregister Dispatcher Phoenix from selected devices.
- SELECT Select registered devices, unregistered devices, select all devices, clear any selections, or expand/collapse all groups.
- DEFAULTS Define default app settings and authentication options for all newly added devices.
- VERTICAL ELLIPSIS Access Help topics, view keyboard shortcuts, and more.

Discovering Devices

Devices must be "discovered" before they can be registered and/or added to device groups. If a device appears on the Devices home page, it has already been discovered.

To discover devices on the network, select the **Discovery** button. The following options appear:

- Search Devices for Konica Minolta Embedded Terminal
- Search Devices for Web Capture Terminal

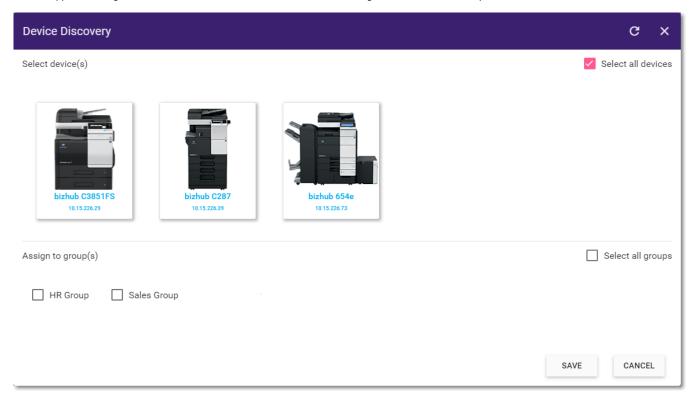
Konica Minolta 1305 / 1597

On this window, you can do the following:

- Select specific devices to add to the Devices page for registration.
- Check the Select All Devices box to select all devices listed.
- Select Save to add all selected devices to the default No Group.
- Assign to group(s)-You can add the selected device(s) to a specific group(s).

Search Devices for Konica Minolta Embedded Terminal

To search for Konica Minolta devices only, select the **Search Devices for Konica Minolta Embedded Terminal** option. The Device Discovery window appears, listing all devices discovered on the network. See the following illustration for an example:

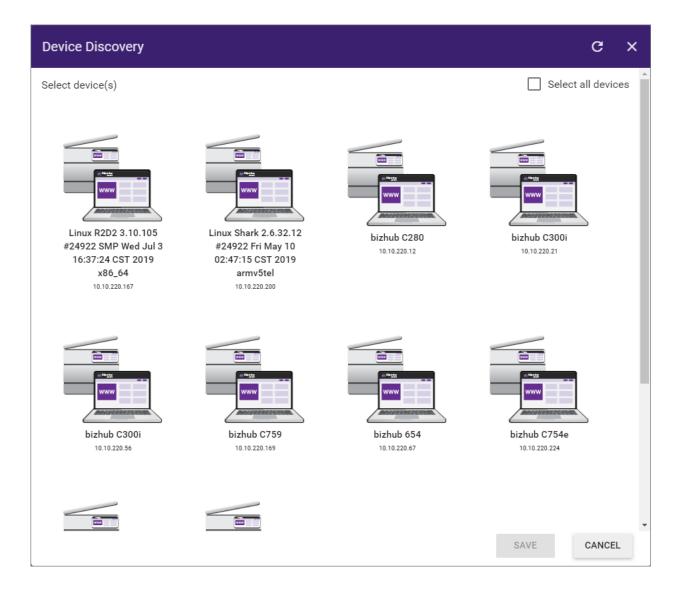


Search Devices for Web Capture Terminal

Use this option to discover devices for use in the **Web Capture** node.

To search for all devices on your network, including Konica Minolta devices, select the **Search Devices for Web Capture Terminal** option. The Device Discovery window appears, listing all devices that have been found on the network. See the following illustration for an example:

Konica Minolta 1306 / 1597



Note: We recommend using Konica Minolta MFPs within your workflows to access their full functionality, including default scan settings.

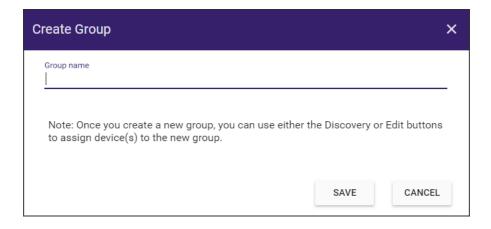
Creating Groups

Administrators can create groups to easily organize and manage their devices into various groups, a critical requirement for enterprise-level businesses with hundreds of devices. Registered devices in device groups can be added to any workflow, including a workflow running in Dispatcher Phoenix without having to stop the workflow. Note that unlike the MFP Panel node, you can configure the **Web Capture node** only with device groups and not with individual devices.

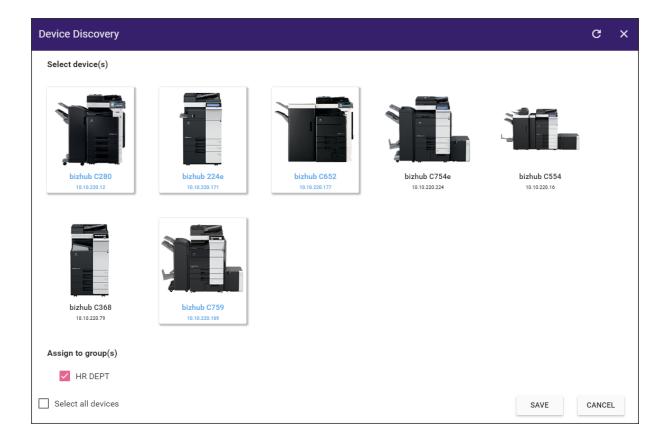
To create a group, do the following:

1. Select the **Create Group** button. The Create Group window appears:

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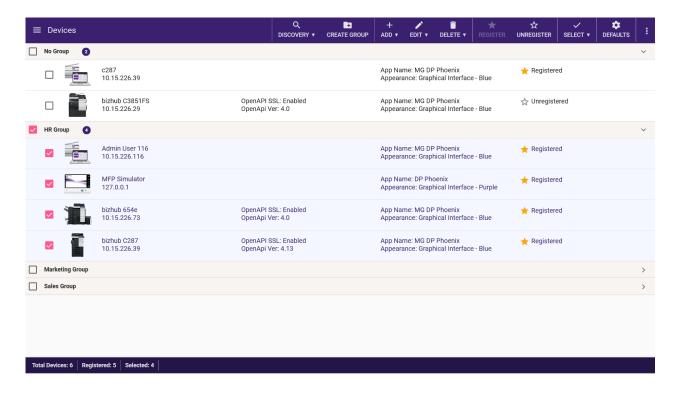


- 2. Enter a name for the group and then select Save.
- 3. The newly created group appears in the Devices page. The number of devices included in the group displays next to the group name.
- 4. To add new devices to a group, do one of the following:
 - Option 1: Using the Device Discovery tool:
 - 1. Select the **Discovery** button on the toolbar.
 - 2. On the Device Discovery window, select the desired devices.
 - 3. Select the group to which you want to add the devices, as shown in the illustration below:



4. Select the **Save** button to add the devices to the specified group(s) and return to the Devices home page, as shown in the illustration below:

Konica Minolta 1308 / 1597



- Option 2: Using the Devices home page:
 - 1. Select the devices you want to add to a group.
 - 2. Select the **Edit** button on the toolbar.
 - 3. On the menu that appears, select either the **Edit Device** or **Change device groups** option.

Note: Double-clicking on a single device's name opens the Edit Device window directly.

Adding Devices Manually

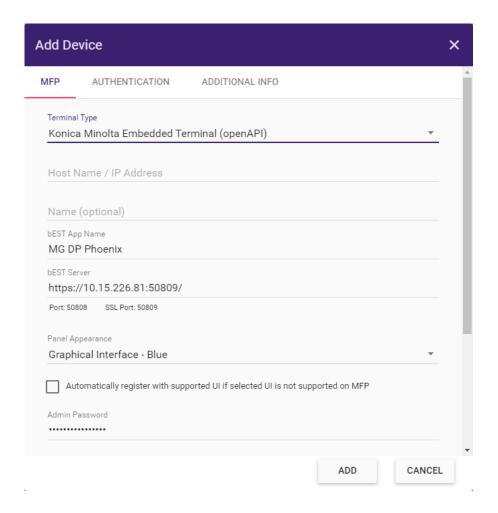
If the **Discovery** option cannot find a particular device, you can manually add a single device if you know the IP address of the device. Click on the **ADD** button and select **Add Device** from the drop-down, as shown in the following illustration:



Note: To add multiple Konica Minolta MFPs at one time to Dispatcher Phoenix, select **Import Devices** to access the **Bulk Import Wizard**. This option is available for Konica Minolta MFPs only.

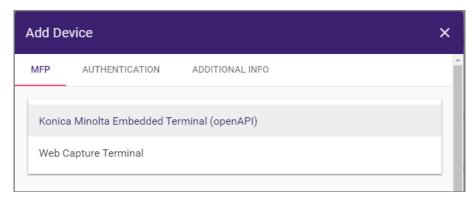
The Add Device window appears, displaying the MFP tab as in the following illustration:

Konica Minolta 1309 / 1597



On the Add Device window, you must first specify a terminal type. The fields that display on the MFP tab vary depending on the terminal type you select. The following instructions describe the options available for both terminal types:

- Konica Minolta Embedded Terminal (OpenAPI) For use with Konica Minolta devices, using the MFP Panel node.
- Web Capture Terminal For use with any device, using the Web Capture node.



Adding a Konica Minolta Embedded Terminal (OpenAPI)

To register the application on a Konica Minolta MFP, do the following:

MFP Tab

The following options appear on the MFP tab.

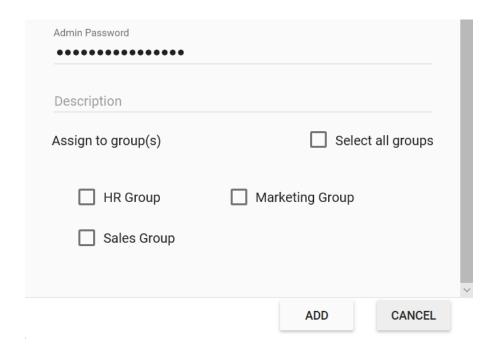
- 1. Terminal Type Click on the dropdown list, then select the Konica Minolta Embedded Terminal (OpenAPI) option.
- 2. Host Name/IP Address Enter the Hostname or IP address of the device you want to add.

Konica Minolta 1310 / 1597

- 3. Name Enter an identifying name for the device. This name is used on the Devices page.
- 4. **bEST App Name** Enter a unique name for your application as you want it to appear on the MFP panel.
- 5. **bEST Server** The URL for the bEST server displays by default. You can customize this URL for advanced networking situations (e.g., bEST Server is registered on a different server, bEST Server is embedded into IIS, Dispatcher Phoenix is installed on a VM with NAT networking, etc.) The bEST service, installed locally on your PC with Dispatcher Phoenix, allows you to use this technology with compatible MFP devices on your network. By entering your IP address or Server Host Name, you let the MFP know where to find the service. This is especially important in the case of multiple IP addresses on a computer to tell the MFP which one to use.
- 6. **Panel Appearance** Choose a panel appearance for the application. Click on the field to display a drop-down list of options. If the MFP does not have the i-Option installed or licensed, choose the Native Interface option.

Automatically register with supported UI if selected UI is not supported on MFP - Check this box to avoid registration failure over panel appearance options. With this option enabled, registration will not fail if the Graphical Interface option is specified for a device that does not have the i-Option installed. Instead, the application will be automatically registered in the Native User Interface mode.

7. Admin Password - Enter the password required for administrative access to the MFP.

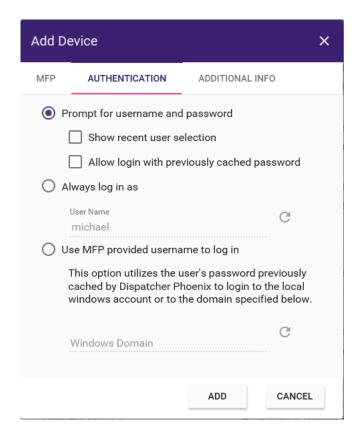


- 8. **Description** Enter a description of the MFP. A description is not required, but a unique description can make the MFP easier to identify when multiple devices are registered under your name.
- 9. **Assign to group(s)** To assign the device to one or more groups, check the box next to the each group name. To assign to all groups, check the **Select All Groups** box.
- 10. ADD Add the device and exit the window.

Authentication Tab

Use this tab to edit the authentication settings. The following illustration provides an example:

Konica Minolta 1311 / 1597



Using the Authentication tab, you can do the following:

- Prompt for username and password Enter a username and password on the MFP control panel screen before accessing workflows. With this setting, the following options are also available:
 - Show recent user selection With this option enabled, users can choose a username from a drop-down list of the last 1000 users who
 have previously logged in, eliminating the need to manually enter this information. However, users must still provide a password. Allow
 login with previously cached password With this option enabled, users can log in without entering a password. The previously entered
 password is used. Note that if the password is changed and the MFP is restarted, the cached password will be lost.

Note: If you change your Windows username and password, you will not be able to access your workflows.

- Always log in as Select this option to minimize set up and quickly access your workflows on the control panel. This option eliminates the need to manually enter a username and password on the device control panel screen. With this option enabled, only the actively running workflows for that particular user will display, and jobs scanned from the panel will run as that user. This field is pre-populated with the username and domain name (if available) of the current user. Use the **Refresh** button next to the field to reset the value to the currently logged-in user.
- Use MFP provided username to log in Select this option for single sign-on (SSO). This option is designed to work with MFP or Active Directory authentication. Optimal for shared workflows, this option will automatically log into Dispatcher Phoenix as the user logged into the MFP. With this option enabled, the Windows Domain field can be pre-populated with the current domain of the logged-in system, or the field can be left blank.

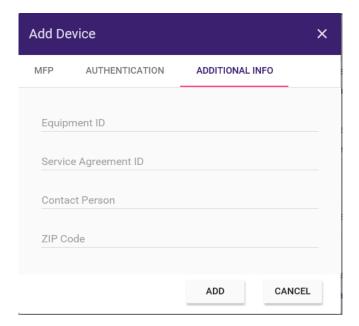
Note: First-time use requires manually entering a password.

- $\mbox{\bf ADD}$ Click to save your settings and exit the window.
- CANCEL Click to exit the window without saving changes.

Additional Info Tab

Select this tab to edit the additional device information including Equipment ID, Service Agreement ID, Contact Person and Zip Code.

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OpenAPI Version Number

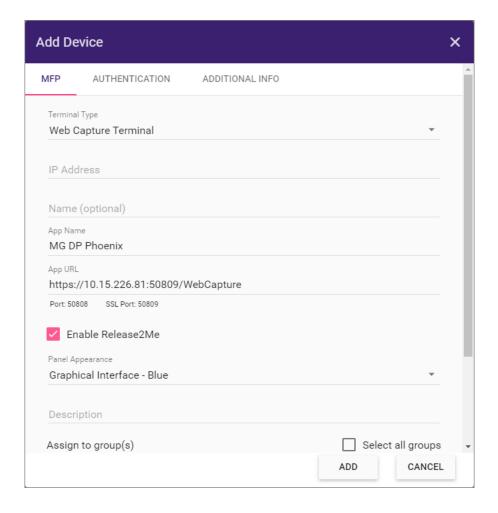
When you finish adding a new device, you return to the Devices Home page where the OpenApi version displays for each Konica Minolta device (but not for Web Capture Terminal devices). Note that if the Native Interface is selected for a device, the OpenApi version number defaults to 3.5.



Adding a Web Capture Terminal

To add devices for submitting or scanning documents via a web browser, do the following:

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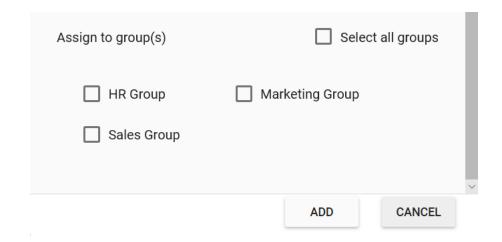
Note: Unlike the **MFP Panel** node, you can configure **Web Capture** nodes only with device groups and not with individual devices. To add a device to a group, see the Assign to Groups step below.

MFP Tab

The following options appear on the MFP tab:

- 1. **Terminal Type** Click on the dropdown list, then select the Web Capture Terminal option.
- 2. IP Address Enter the IP address of the device you want to add.
- 3. **Name** Enter an identifying name for the device. This name is used on the Devices page.
- 4. App Name Enter a unique name for your Web Capture application.
- 5. **App URL** The URL for the Web Capture server displays by default. Paste this URL into your web browser to display all running workflows assigned this user in Dispatcher Phoenix.
- 6. **Enable Release2Me** To access your Release2Me print queue from the web browser, check this box.
- 7. Panel Appearance Choose a panel appearance for the Web Capture application. Click on the field to display a drop-down list of options.
- 8. **Description** To enter a description of the device, click on this field. A description is not required, but a unique description can make the device easier to identify when multiple devices are registered under your name.
- 9. **Assign to group(s)** To assign the device to one or more groups, check the box next to the each group name. To assign to all groups, check the **Select All Groups** box. Note that **Web Capture** must be assigned to a group to run in a Dispatcher Phoenix workflow.

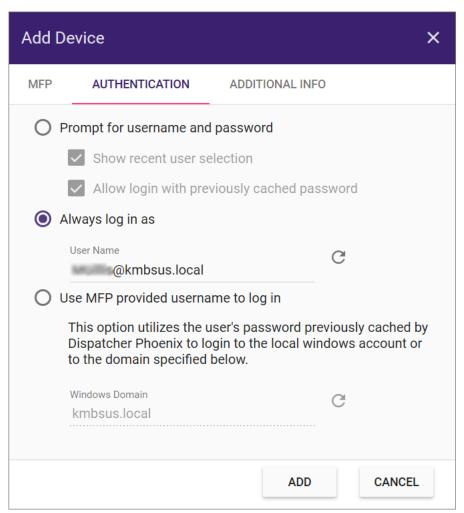
Konica Minolta 1314 / 1597



10. ADD - Add the device and exit the window.

Authentication Tab

Use this tab to edit the authentication settings. See the following example:



Using the **Authentication** tab, you can do the following:

• **Prompt for username and password** - Enter a username and password on the device control panel screen before accessing workflow(s). With this setting, the following options are also available:

Konica Minolta 1315 / 1597

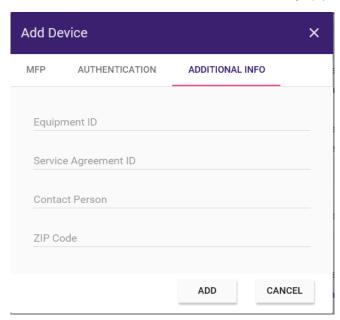
- Show recent user selection - With this option enabled, users can choose a username from a drop-down list of the last 1000 users who have previously logged in, eliminating the need to manually enter this information. However, users must still provide a password. - Allow login with previously cached password - With this option enabled, users can log in without entering a password. The previously entered password is used. Note that if the password is changed and the MFP is restarted, the cached password will be lost.

Note: If you change your Windows username and password, you will not be able to access your workflows.

- Always log in as Select this option to minimize set up and quickly access your workflows on the control panel. This option eliminates the need to manually enter a username and password on the device control panel screen. With this option enabled, only the actively running workflows for that particular user display, and jobs scanned from the panel will run as that user. This field is pre-populated with the username and domain name (if available) of the current user. Use the **Refresh** button next to the field to reset the value to the currently logged-in user.
- · ADD Click to save your settings and exit the window.
- CANCEL Click to exit the window without saving changes.

Additional Info Tab

Select this tab to edit the additional device information including Equipment ID, Service Agreement ID, Contact Person and Zip Code.



• ADD - Click to save your settings and exit the window.

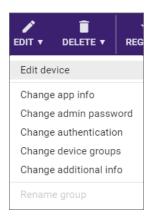
Editing App Settings

On **Dispatcher Phoenix Web's Devices** page, you can edit specific app settings for a single device. Some settings are not editable, depending on the terminal type and the registration status of the device.

To edit the app settings for a device, do the following:

- 1. On the **Devices** page, click on the box next to the device you want to edit. You can also double-click on the device.
- 2. If you don't double-click, select the **Edit** button on the top tool bar. A drop-down list appears offering the following edit options:

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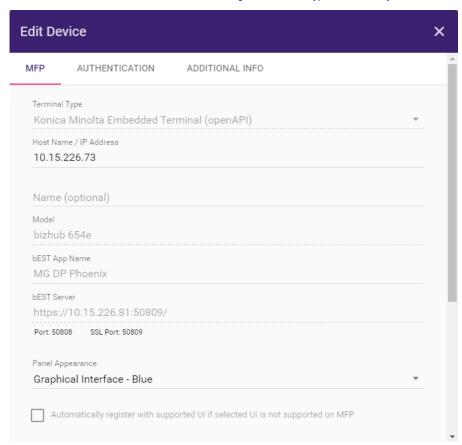
3. Select Edit device to access the Edit Device window.

The following describes the available options for a **Konica Minolta Embedded Terminal (OpenAPI)** terminal type. A description of the options for the **Web Capture** terminal type appears farther below in this topic.

Editing Konica Minolta Embedded Terminal (OpenAPI) Terminal Types

Not all device settings in the Edit Device window are editable. To determine if a field is editable, click on it.

• **Terminal Type** - This field displays the terminal type of the device selected for editing. The terminal type determines the options that appear on this window. You cannot edit this field. To change the terminal type of a device, you must delete the device and re-create it.



For information on the fields on this screen, see Adding a Konica Minolta Embedded Terminal (OpenAPI).

Note: The Edit Device window contains the following field that does not appear on the Add Devices window:

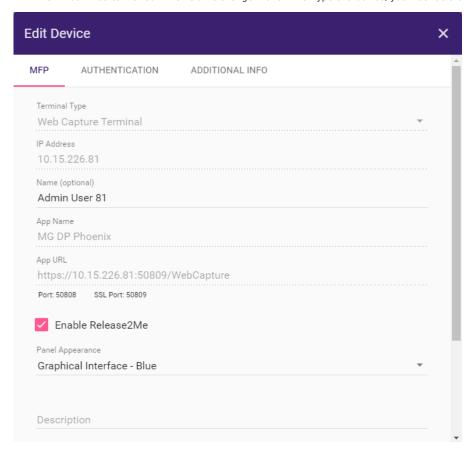
• Model - The device model name appears. This field is not editable.

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Editing Web Capture Terminal Types

This section describes editing the **Web Capture** terminal type. Not all device settings in the **Edit Device** window are editable. To determine if a field is editable, click on it.

• **Terminal Type** - This field displays the terminal type of the device selected for editing. The terminal type determines the options that appear on this window. You cannot edit this field. To change the terminal type of a device, you must delete the device and re-create it.



Note: For Web Capture terminals, the **IP Address** field defaults to the logon user and you cannot edit it. To change the IP address of a device, you must delete the device and re-create it.

For further information on the fields on this screen, see Adding a Web Capture Terminal.

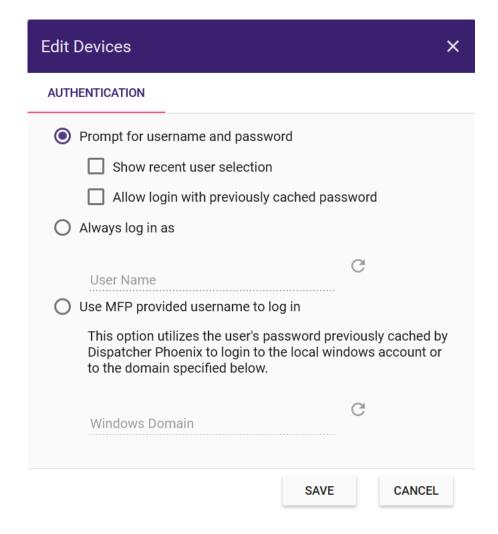
Editing Authentication Options on a Single Device

To edit the authentication settings for a device, use the **Authentication** tab on the **Edit Settings** window. The available options vary depending on the terminal type of the selected device.

Editing the Authentication Options for Konica Minolta Embedded Terminals (OpenAPI)

The options that appear on this tab vary depending on the terminal type of the selected device. The following describes the available options for a **Konica Minolta Embedded Terminal (OpenAPI)** terminal type. A description of the options for the **Web Capture** terminal type appears farther below in this topic.

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Using the Authentication tab, you can do the following:

• Prompt for username and password - To require users to enter a username and password on the MFP control panel screen before accessing MFP Panel workflow(s), select this option. With this setting, the following options are also available: - Show recent user selection - With this option enabled, users can choose a username from a drop-down list of the last 1000 users who have previously logged in, eliminating the need to manually enter this information. However, users must still provide a password. - Allow login with previously cached password - With this option enabled, users can log in without entering a password. The previously entered password is used. Note that if the password is changed and the MFP is restarted, the cached password will be lost.

Note: If you change your Windows username and password, you will not be able to access your workflows.

- Always log in as Select this option to minimize set up and quickly access your workflows on the control panel. This option eliminates the need to manually enter a username and password on the device control panel screen. With this option enabled, only the actively running workflows for that particular user will display, and jobs scanned from the panel will run as that user. This field is pre-populated with the username and domain name (if available) of the current user. Use the **Refresh** button next to the field to reset the value to the currently logged-in user.
- Use MFP provided username to log in Select this option for single sign-on (SSO). This option is designed to work with MFP or Active Directory authentication. Optimal for shared workflows, this option automatically logs into Dispatcher Phoenix as the user logged into the MFP. With this option enabled, the Windows Domain field may be pre-populated with the current domain of the logged-in system, or the field may be left blank. Use the **Refresh** button next to the field to reset the value to the current domain.

Note: First-time use requires manually entering a password.

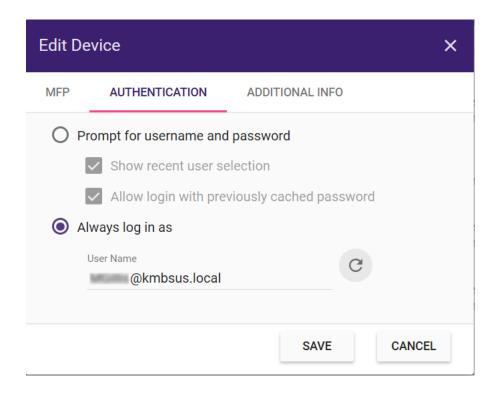
• Save - Click this button to save your settings.

Editing the Authentication Options for Web Capture Terminals

The options that appear on this tab vary depending on the terminal type of the selected device. The following describes the available options for a **Web Capture** terminal type. A description of the options for the Konica Minolta Embedded Terminal (OpenAPI) terminal type appears in the previous topic.

• Authentication - Use this tab to edit the authentication settings as shown in the following illustration:

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Using the Authentication tab, you can do the following:

- **Prompt for username and password** To require users to enter a username and password on the device control panel screen before accessing workflows, select this option. With this setting, the following options are also available:
 - Show recent user selection With this option enabled, users can choose a username from a drop-down list of the last 1000 users who have previously logged in, eliminating the need to manually enter this information. However, users must still provide a password.
 - Allow login with previously cached password With this option enabled, users can log in without entering a password. The previously entered password is used. Note that if the password is changed and the MFP is restarted, the cached password will be lost.

Note: If you change your Windows username and password, you will not be able to access your workflows.

- Always log in as Select this option to minimize set up and quickly access your workflows on the control panel. This option eliminates the
 need to manually enter a username and password on the device control panel screen. With this option enabled, only the actively running
 workflows for that particular user will display, and jobs scanned from the panel will run as that user. This field is pre-populated with the
 username and domain name (if available) of the current user. Use the Refresh button next to the field to reset the value to the currently
 logged-in user.
- Save Click this button to save your settings.

Editing Multiple Devices

The **Dispatcher Phoenix Web's Devices** page also allows you to configure multiple devices at the same time. You can multi-select specific devices as well as select an entire group and then do the following:

- · Edit app settings/authentication options for all of the selected devices or all of the devices in the group.
- Add multiple devices to a new or existing group.

Do the following:

- 1. On the Devices page, select individual devices, devices within a group, or an entire group. You can also check the **No Group** box to select all devices that have not been already categorized into a group.
- 2. Select the **Edit** button, where you can edit any of the options that appear in the drop down.

Deleting Devices/Groups

Administrators can remove a device from any group, delete devices, or delete groups by using the **Delete** button on the top tool bar.

Note: Only unregistered MFPs can be deleted. To delete a registered MFP, you must unregister it first.

Do the following:

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- 1. Select one or more device or group.
- 2. Select the **Delete** button in the toolbar to open the drop-down list as show in the following illustration:



3. Do one of the following:

- **Delete selected devices** Remove selected devices from the Devices Tool. This option also removes the selected devices from all groups to which they were assigned.
- **Delete selected groups** Remove a group or multiple groups from the Devices Tool. If the devices within the selected group(s) do not belong to any other group, they appear in the **No Group** category.
- Remove device(s) from group(s) Remove selected devices from a group.

Registering/Unregistering Devices

Devices must be registered in **Dispatcher Phoenix** before they can be used in a workflow. You can register devices using Dispatcher Phoenix Web.

To register devices, do the following:

- 1. On the Devices page, select one or more devices to register.
- 2. Select the Register button on the top tool bar. This button is active only if you select at least one unregistered device on the Device page.

Notes:

- If you register a large number of MFPs all at once (e.g., 10 or more MFPs), the MFPs register concurrently, four at a time, with the rest placed in a queue status.
- When registering, the bEST App Name that displays at the MFP must be unique among all users. Click **here** for more information about taking over registrations.

To unregister devices, do the following:

- 1. On the Devices page, select one or more devices to unregister.
- 2. Select the **Unregister** button on the top tool bar. This button is active only if you select at least one registered device on the Device page.

Setting Defaults

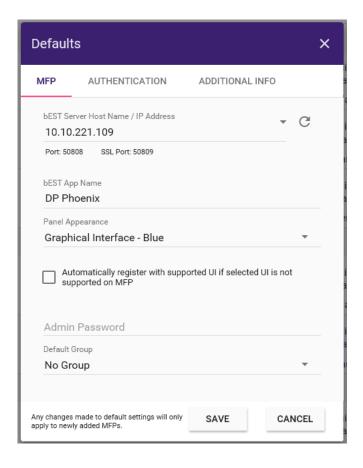
Use the **Defaults** window to configure default device settings and authentication options for all registered devices. You can then override the default settings for individual devices, if desired, using the **Edit** window.

Note: Any changes made on the **Defaults** window are saved but not applied to or validated against any device until the device is either registered for the first time or unregistered and then registered again.

Default MFP Settings

This section describes the settings on MFP tab.

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• **bEST Server Host Name / IP Address** - Use this field to set the default location of the Application Server. Enter your IP address or Server Host Name in the field. By default, the field populates with the IP address of your computer.

In addition, you can specify default settings for your applications on this window by doing the following:

- bEST App Name Enter the name you want to appear on the control panel to identify your bEST applications.
- Panel Appearance Choose how you want the workflow to appear on the control panel. You have the following options:
 - **Graphical Interface** Displays the details of the scan settings for the workflow, along with a thumbnail image of the workflow itself. This is the default setting.
 - Native Interface Lists the workflow in a non-graphical, text-based manner. Select this option for devices for which the i-Option is not licensed and installed.

Note: For **Web Capture** device types, if the default setting is set to **Native Interface**, the setting reverts automatically to **Graphical Interface**.

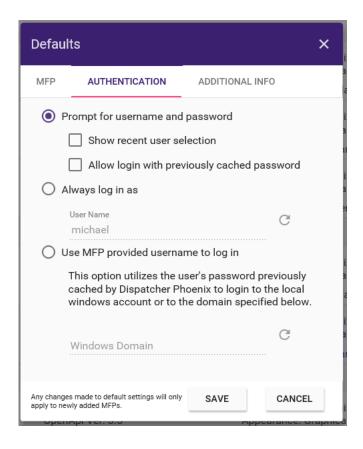
- Automatically register with supported UI if selected UI is not supported on MFP To avoid registration failure over panel appearance options, check this box. With this option enabled, the MFP automatically registers as a Native UI if it is does not have Graphical UI support (and the Graphical User Interface option is specified for that MFP).
- Admin Password Enter a password to provide administrative access to the device. This password will be used automatically the next time you register a bEST application.
- Default Groups Choose an existing group to be the default group. All new devices will be automatically assigned to this default group.
- Save Save your changes and exit the window.

Default Authentication Settings

This section describes the default the user authentication settings for your workflows.

Note: Any authentication changes made on this tab apply ONLY to newly defined MFPs, not existing MFPs.

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- **Prompt for username and password** This is the default setting. It requires users to enter a username and password on the MFP control panel screen before accessing their workflows. With this setting, the following options are also available:
 - **Show recent user selection** With this option enabled, users can choose a username from a drop-down list of the last 1000 users who have previously logged in, eliminating the need to manually enter this information. However, users must still enter a password.
 - **Allow login with previously cached password** With this option enabled, users can log in without entering a password. The previously entered password will be used. Note that if the password is changed and the MFP is restarted, the cached password will be lost.

Note: If you change your Windows username and password, you will not be able to access your workflows.

• Always log in as - To minimize set up and quickly access your workflows on the control panel, you can choose to use your Windows log in name every time when accessing workflows. This option eliminates the need to manually enter a username and password on the MFP control panel screen. With this option enabled, only the actively running workflows for that particular user will display, and jobs scanned from the panel will run as that user. This field is pre-populated with the username and domain name (if available) of the current user.

Use the **Refresh** button next to the field to reset the value to the currently logged-in user.

• **Use MFP provided username to log in** - This single sign-on (SSO) option is designed to work with MFP or Active Directory authentication. Optimal for shared workflows, this option automatically logs into Dispatcher Phoenix as the user logged into the MFP. With this option enabled, the Windows Domain field can be pre-populated with the current domain of the logged-in system, or the field can be left blank. Note that first-time use requires manually entering a password.

Use the Refresh button next to the field to reset the value to the current domain.

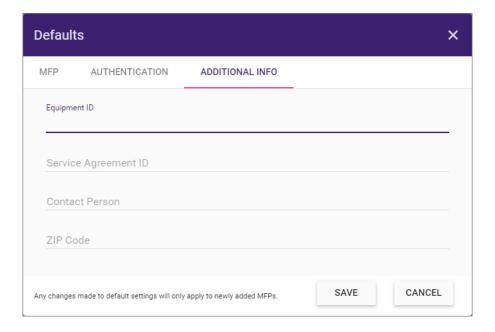
Note: For **Web Capture** device types, if the default setting is set to **Use MFP provided username to log in**, the setting reverts automatically to **Prompt for username and password**.

Default Additional Information Settings

Use the Default Additional Information settings to configure default "additional information" for **Dispatcher Phoenix** devices. When adding devices, the information you specify here appears for the new device. You can accept the default or specify new information. These customizable fields include the following:

- Equipment ID
- Service Agreement ID
- Contact Person
- · Zip Code

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Bulk Import Tool

Dispatcher Phoenix's **MFP Bulk Import Tool** enables organizations to simplify the process of adding Konica Minolta MFPs to the Dispatcher Phoenix Devices Tool. This tool is designed to allow IT departments to streamline the process of importing multiple devices into Dispatcher Phoenix.

Note: This tool can bulk-import only Konica Monica MFPs. For example, you cannot use this tool to bulk-import devices into a web capture terminal.

Using the MFP Bulk Import Tool

The Bulk Import Tool should be used by large or enterprise organizations who need to import a large number of new devices. When new MFPs are purchased by an organization, their information, such as model and MAC address, are often available to the business prior to the devices' arrival and installation. To proactively prepare new devices for use with Dispatcher Phoenix workflows and avoid unnecessary down-time, the **MFP Bulk Import Tool** allows organizations to bulk import device information before the devices are live on the network.

- Step One: Access the Devices Tool in Dispatcher Phoenix Web
- Step Two: Configure your MFP Defaults
- Step Three: Download the Bulk Import Excel Template
- Step Four: Configure the Bulk Import Excel Template
- · Step Five: Import the Device List
- Step Six: Verify Device Information
- Step Seven: Register Devices

Note: When using this tool to import a large number of devices, the import may take several minutes.

Step One: Access the Devices Tool in Dispatcher Phoenix Web

To get started, do the following:

- 1. Log into Dispatcher Phoenix Web with your Windows User Credentials.
- 2. Select the **Devices** tile.

See the following illustration for an example:

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The **Devices Home Page** lists any devices that have already been discovered, added, or registered. Any devices that have not been associated with a group are listed underneath the "No Group" category. See the following illustration for an example:

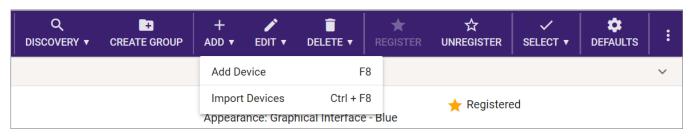


Step Two: Configure your MFP Defaults

To prepare for the Bulk Import process, please configure your MFP Defaults. **Click here** for instructions on how to configure the default MFP settings prior to importing one or more devices to Dispatcher Phoenix.

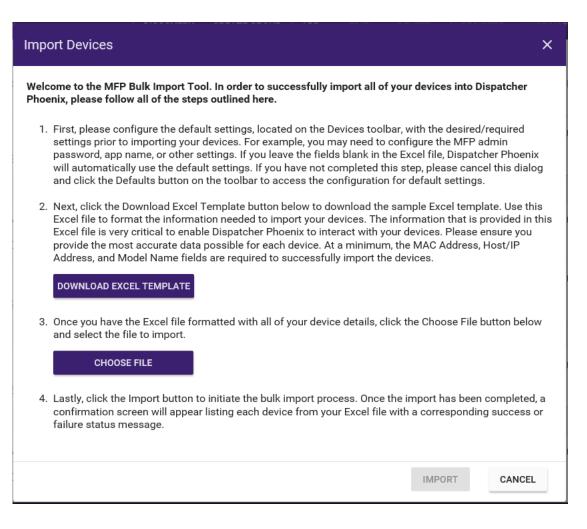
Step Three: Download the Bulk Import Excel Template

To download the Bulk Import Excel Template, click on the **ADD** button and selecting the **Import Devices** option from the dropdown, as shown in the following illustration:



Then, the Import Devices window will appear, as in the following illustration:

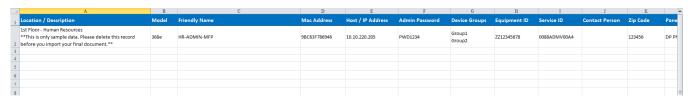
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Under Step 2, click the **DOWNLOAD EXCEL TEMPLATE** button to download and/or save the file.

Step Four: Configure the Bulk Import Excel Template

Next, open the Excel Template to begin configuring each devices details. See the following illustration for an example:



The columns in this template can be rearranged. However, the text in the column headers cannot be changed. The following fields can be configured using the Excel Template:

- $\bullet\,$ Location/Description A description of the location and/or purpose of the device.
- Model The proper model name of the device, such as "224e or bizhub 224e". If the model name does not match a Konica Minolta device, a
 generic image will appear for that MFP.
- Friendly Name The user friendly name of the device.
- MAC Address The unique identifier assigned to this device on the network. This field ignores the following characters (dash), : (colon) and . (period)
- Host/IP Address The Host Name or IP Address of the device.
- $\bullet\,$ Admin Password The admin password for Dispatcher Phoenix on this device.
- Device Groups The group(s) the device should be associated with. Each Group Name should be separated by a new line.
- Equipment ID The device's internal equipment ID number.

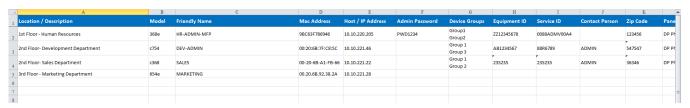
Konica Minolta 1326 / 1597

- Service ID The device's internal service ID number.
- Contact Person The person who should be contacted regarding this device.
- Zip Code The Zip Code of the address where this device is located.
- Panel App Name The application name that should appear for Dispatcher Phoenix at the MFP Panel.
- Server URL The URL for the Dispatcher Phoenix Server.

At a minimum, the following 3 (three) fields are required for each device:

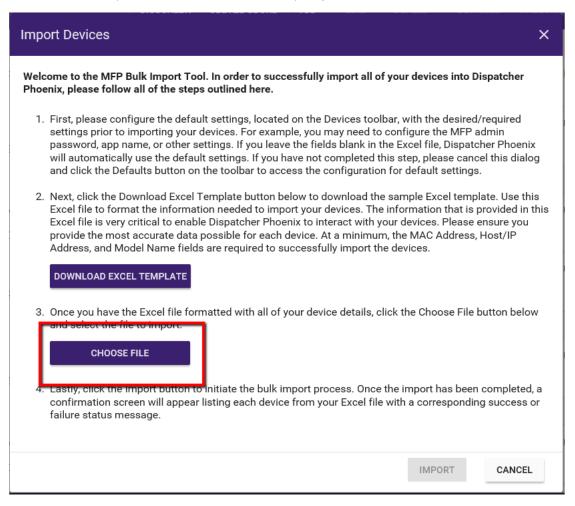
- Model
- MAC Address
- Host/IP Address

Note: If any of the other fields are left blank, all pre-configured MFP Default Settings will be applied.



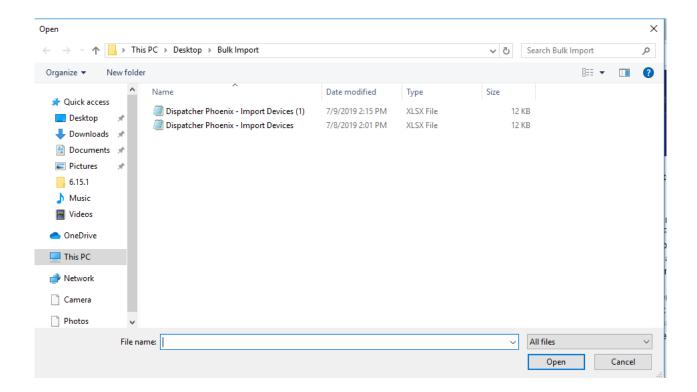
Step Five: Import the Device List

Once your template is configured with the necessary device details, navigate back to the Dispatcher Phoenix Devices Bulk Import Tool in Dispatcher Phoenix Web. Under Step 3, click the **CHOOSE FILE** button to upload your device list.

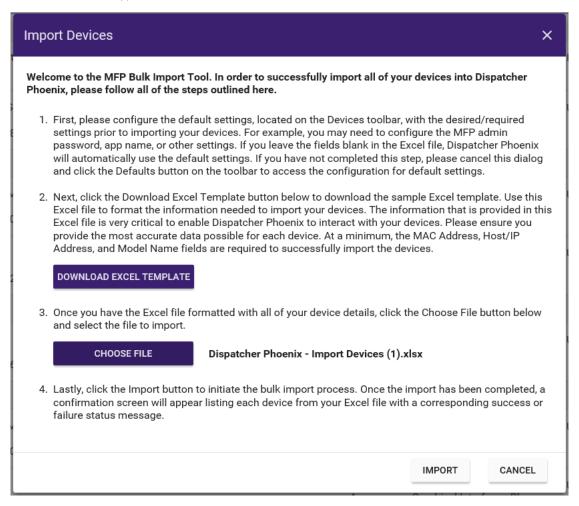


Using the file broswer, select the device list you'd like to import and click **Open**.

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The file name will then appear next to the CHOOSE FILE button as shown in the illustration below:

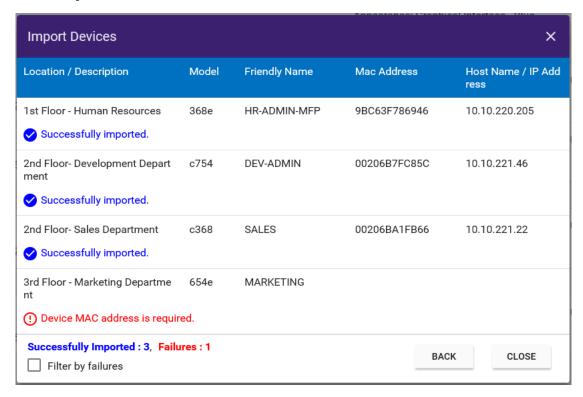


To begin the device import, click the $\ensuremath{\mathsf{IMPORT}}$ button.

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Step Six: Verify Device Information

Once the import has been completed, a confirmation screen will appear listing each device from the Excel file with a corresponding success or failure status message, as show in the illustration below:



Using this window you can:

- · View all pertinent device information for each device imported.
- Review the status of each device imported into Dispatcher Phoenix.
- View a summary of the number of successes and failures that have occurred during the import (a result of 0 will not display that particular text e.g., if i import with 5 successes then the failures part wont be display and vice versa).
- Use the **Filter by failures** check box to filter for failed imports. If there are ONLY successes or ONLY failures this check box will not appear as there would be nothing to filter.

Step Seven: Register Devices

When the devices have been fully configured on the network, you will need to register the devices to Dispatcher Phoenix in order to associate the device to specific workflows.

If an error occurs when attempting to register a device, check the MFP settings. If the MAC Address has been imported incorrectly, delete the device and re-add the MFP to complete the device registration.

For more information on Device Registration, click here.

Release2Me Print Delegation

Users can access their Release2Me print queue and share print jobs with other users, using Dispatcher Phoenix Web's **Release2Me** app. This webbased feature provides businesses with the flexible, advanced control they need to secure their printouts and reduce their printing costs.

Note: Users of the Print Delegation feature must be part of a corporate domain.

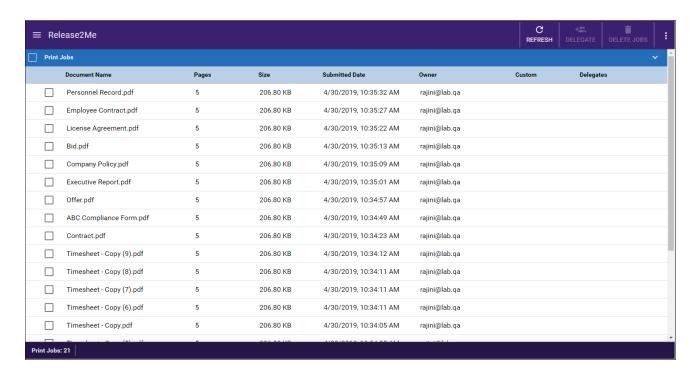
Getting Started

To access the Release2Me app, do the following:

1. Log into Dispatcher Phoenix Web, using your preferred web browser.

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2. Select the **Release2Me** tile or the **Tools > Release2Me** option from the slide out menu to access your Release2Me print queue. See the following illustration for an example:



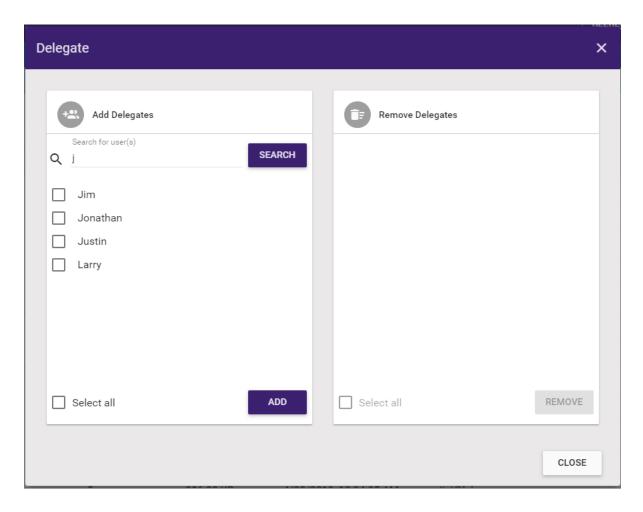
- 3. On the Release2Me page, you can do the following:
 - View the list of print jobs that are currently in your print queue. Details about each print job display, including the following:
 - document name
 - number of pages
 - file size
 - date it was sent to the queue
 - job owner
 - Print Jobs To select all jobs in the queue, check this box. To select an individual print job, check the box next to the Document Name.
 - REFRESH To reload the print jobs in the list, click this button on the top toolbar.
 - DELEGATE To share selected print jobs with users, click this button on the top toolbar.
 - **DELETE JOBS** To **delete selected print jobs**, click this button on the top toolbar.

Delegating Print Jobs

To give another user the ability to release your print jobs from their Release2Me print queue at the MFP, do the following:

- 1. Select the print jobs in the list that you are interested in delegating to someone else.
- 2. Select the **DELEGATE** button.
- 3. On the **Delegate** window, enter the user's name in the **Add Delegates** box. Next, select the **SEARCH** button. The results appear in the box, as in the following illustration:

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- 4. Check the box next to the user you want to share your print job with, or check the Select all box to share with all users listed.
- 5. Select the **ADD** button. Now the selected user appears on the **Remove Delegates** side of the window.
- 6. To remove delegates from a print job, check the box next to the user's name in the Remove Delegates box, and then select the **REMOVE** button. You can also check the **Select all** button to select and remove all users.
- 7. Select the **CLOSE** button when done.

Once a print job has been delegated to another user, that user is listed in the print queue under the Delegates column. Once authenticated at an MFP, users can view their print jobs as well as the jobs that were delegated to them. They can then perform the same operations on ALL print jobs in their queue, including:

- · Releasing jobs for printing.
- Releasing jobs for printing but keeping them in the queue.
- Deleting jobs from a queue.
- · Specifying print sett

Deleting Print Jobs

To delete print jobs from your Release2Me print queue, do the following:

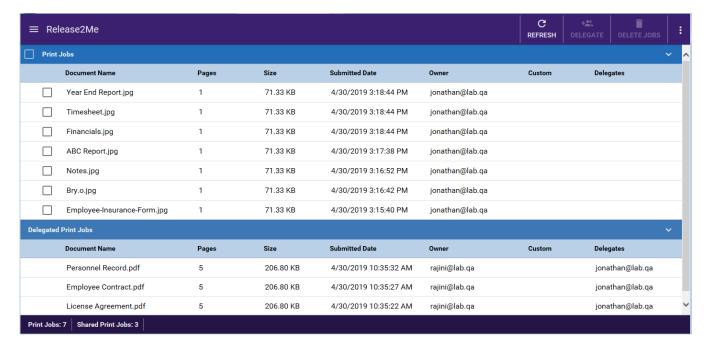
- 1. Select the print jobs in the list you want to delete.
- 2. Select the **DELETE** button.

Viewing Delegated Print Jobs

Users who have been delegated print jobs can view the delegated print jobs in their print queue on Dispatcher Phoenix Web. Dispatcher Phoenix Web's Release2Me app displays all of the user's local print jobs as well as a list of delegated print jobs.

See the following illustrations for an example:

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Note: You cannot delegate or delete print jobs that have been delegated to you.

Reports

Dispatcher Phoenix Web provides a Report Generator Tool you can use to generate a variety of reports about your Dispatcher Phoenix system and its usage. Current reporting options are:

- · Doc-Classifier
- ECM Reports
- Release2Me Print Reports
- · RightFax Report

To access the Report Generator Tool, do the following:

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the **REPORTS** button, or the **Reports** option from the slide out menu.

See the following illustration for an example of the Report Generator page:

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Doc-Classifier Reports

To generate reports on data captured by the **Doc-Classifier node**, select the Doc-Classifier tile on the Report Generator page. Note that this tile appears only if the Doc-Classifier license is active on your system.

The following report types can be dynamically created:

- Executive Report
- Classification Summary
- · Classification Documents

Note: To enable data collection for the Doc-Classifier node, you must first check the **Enable workflow auditing** box on the **Database Setup** tab of the **Options** window in the Dispatcher Phoenix client application. To access the Options window, select **Tools > Options**.

You can use the controls on the Configuration panel on the left side of the page to customize each report. If you retain the default configuration settings, all available data appears in the report. You have the following configuration options:

- Start Date The report generates data from the date range you specify here and at the End Date field. The default start date is 30 days prior to the current date. To change the date range, specify a different date here and/or at the End Date field.
- End Date The report generates data from the date range you specify here and at the Start Date field. The default end date is the current date. To change the date range, specify a different date here and/or at the Start Date field.
- **Filter Options** To restrict the report output to specified criteria, use one or more of the following filters. Each filter supports the " * " and " ? " wildcards. In addition, for each filter option, an **Exclude** option is available where you can exclude the specified criterion from the report. If you leave the Exclude box blank, the report includes any specified criterion.
 - Classification Type To restrict the report to a specific classification type, specify the type here, for example Invoices or W-2 Forms.
 - **Document Source** To restrict the report to a specific document source (that is, the node in the workflow from which the documents to classify originated), specify the source here, for example Input Folder or MFP.
 - Workflow To restrict the report to a specific Doc-Classifier workflow, specify the workflow here.

GENERATE REPORT - When finished configuring the report, click this button to generate the report and display a snapshot on the screen. The timestamp updates on right side of the Status bar. This snapshot remains until you either click this button again or exit the Doc-Classifier Report Generator page. That is, to display the results of your current report configuration, you must click this button.

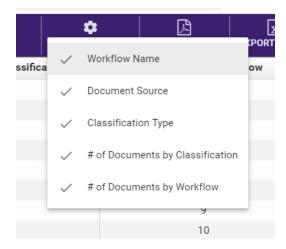
Tool Bar

Once you generate a report, the Tool bar at the top of the page activates. You can use the Tool bar to search through the report and save the report in a variety of formats. In the following illustration, the Tool bar appears at the top:

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- Search To filter the records displayed on the screen by a specified string, enter the string then click the **Arrow** button. The string you enter must exactly match the contents of at least one cell in the table. Otherwise, no results appear. To release the current filter, empty the Search field then click the **Arrow** button.
- Export Options To filter the columns in the report, click this button to display a list of columns in the selected report. Checked columns appear in the snapshot on the screen as well as in the exported report. To exclude a column, remove the check. The following illustration shows the options for the Classification Summary report:



- EXPORT AS PDF Use this option to save the report in PDF format. The following options are available:
 - Export all data Export all data to PDF format, including data filtered out of the page view.
 - Export only visible data Export only data for the rows that are visible on the page to PDF format, limited by the Filter Options and any search criteria. Note that data from columns that are not visible will be included as long as the row is visible.
 - Export only selected data Export only data that has been selected on the page to PDF format.

See the following illustration:



- EXPORT AS CSV Use this option to save the report in CSV format. The following options are available:
 - Export all data Export all data to CSV format, including data filtered out of the page view.
 - Export only visible data Export only data for the rows that are visible on the page to CSV format, limited by the Filter Options and any search criteria. Note that data from columns that are not visible will be included as long as the row is visible.
 - Export only selected data Export only data that has been selected on the page to CSV format.

Status Bar

Once you generate a report, the status bar appears at the bottom of the Report Generator Tool, displaying the following information:

• The type of report generated.

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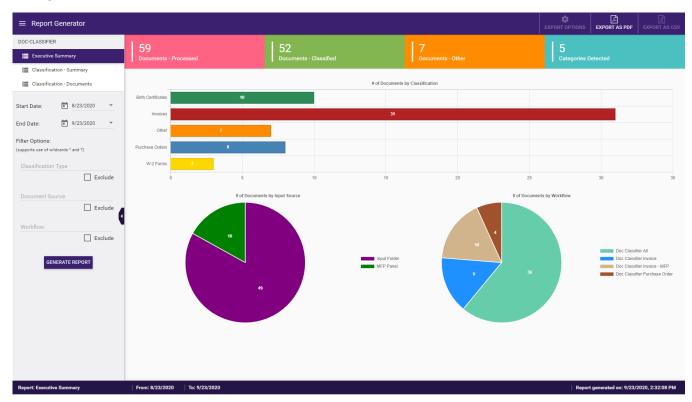
- The number of records generated.
- · The report's time period.
- The timestamp for the report.

See the following illustration for an example:



Executive Summary Report

The Executive Summary report displays a visual report consisting of color graphs as well as bar, column, and doughnut charts, as shown in the following illustration:



The report provides a comprehensive visual summary of Doc-Classifier activity, including the following information from Doc-Classifier workflows:

- · Total documents processed
- · Total documents classified
- · Total documents not classified Other
- Total categories detected
- Total number of documents by:
 - Classification
 - Input source
 - workflow

On visual reports, you can do the following:

- For bar graphs, you can hover over a bar to display information on the data item.
- For pie charts, you can do the following:
 - Hover over a pie section to display information on the data item.
 - Click on one or more legend items to exclude those sections from the pie. For example, if the pie legend lists four document types, if you click on one, that section disappears from the pie and only three sections remain. To restore the pie section, click on the legend item again.

Export as PDF

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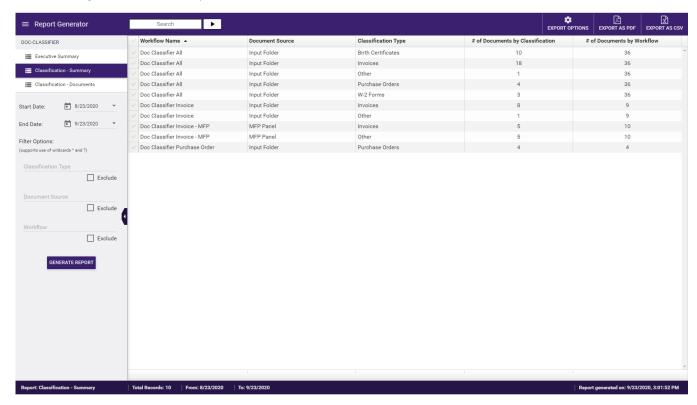
To export the visual report as a PDF file, click the **EXPORT AS PDF** button on the right of the **Tool bar**. Note that the other Export buttons on the page are not active for visual reports such as the Executive Summary report.

Classification - Summary Report

Use this report to display a summary of classification activity performed by the Doc-Classifier node. The report includes the following information:

- · Workflow name
- · Document source
- · Classification type
- Number of documents by classification
- · Number of documents by workflow

See the following illustration for an example:



On the report, you can do the following:

- Select a specific record by checking the box in the row that you are interested in, for example to select one or more records for export.
- Select all records by checking the box located in Column 1, Row 1, for example to select all records for export.
- Sort data in ascending or descending order by clicking on the column's up/down arrow.

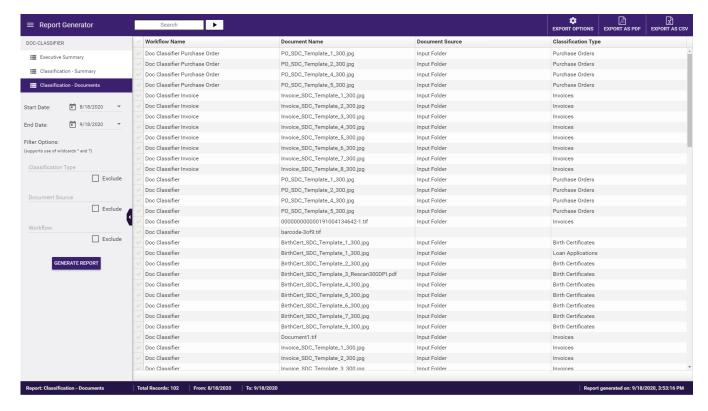
Classification - Documents Report

This report lists all documents classified by the Doc-Classifier node, including documents classified as "other". For each document in the report, the following information appears:

- · Workflow name
- Document name
- Document source
- Classification type

See the following illustration for an example:

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On the report, you can do the following:

- · Select a specific record by checking the box in the row that you are interested in, for example to select one or more records for export.
- Select all records by checking the box located in Column 1, Row 1, for example to select all records for export.
- Sort data in ascending or descending order by clicking on the column's up/down arrow.

ECM Reports

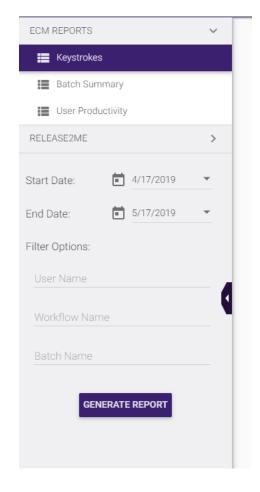
Dispatcher Phoenix Web provides a Report Generator Tool that allows users to generate a variety of reports about their Batch Indexing and Verification operations. The option for ECM Reports appears only if an ECM add-in such as Batch Indexing or Verification is enabled. Current ECM reports include:

- Keystroke Tracking Report Tracks the number of keystrokes that were pressed during the indexing of a specific batch.
- Batch Summary Report Lists statistical information about each batch that has been submitted, including information about the average processing time per document and batch.
- **User Productivity Report** Lists statistical information about each DP Web user using the ECM tool set, including information about number of keystrokes entered, total processing time, and much more.

To generate a report, do the following:

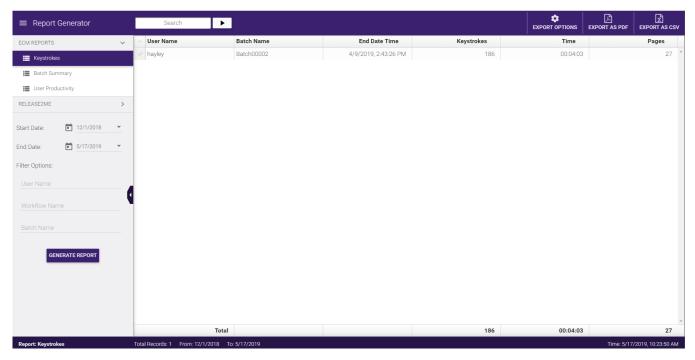
1. Click on the specific report that you are interested in. Other options will then appear, as in the following illustration:

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- 2. Use the **Start Date** and **End Date** drop-down lists to specify a time period for the report.
- 3. If necessary, enter a **user name**, **workflow name**, or **batch name** in the supplied fields to filter the report accordingly.
- 4. Select the $\ensuremath{\mathbf{GENERATE}}$ $\ensuremath{\mathbf{REPORT}}$ button when you are done.

The generated report then appears in the main section of the window, as in the following illustration:



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Now the tool bar at the top of the page activates and a status bar at the bottom of the page appears.

On the report, you can do the following:

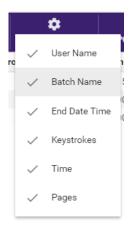
- Select a specific record by clicking on the checkmark box in the row that you are interested in.
- Select all records by clicking on the checkmark box located in Column 1, Row 1.
- · Sort data in ascending or descending order by clicking on the column's up/down arrow.

Key Features

• **Tool Bar** - The Report Generator Tool includes a tool bar you can use to search through the report and save the report in a variety of formats. See the following illustration for an example:

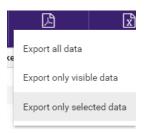


- Search Allows you to enter text to filter the records displayed in the report. Click on the arrow button next to the field to begin the search process.
- **Export Options** Filter the specific data that you want included in the report. If you de-select an option, that data will no longer appear in the report. The options available from the drop-down list will vary, depending on the report that you have generated. For example, with the Keystroke Tracking Report, you can choose the following:



- **EXPORT AS PDF** Save the report in PDF format. The following options are available:
 - Export all data Export all data to PDF format.
 - Export only visible data Export only data that is visible on the page to PDF format, limited by the Filter Options and any search criteria.
 - Export only selected data Export only data that has been selected on the page to PDF format.

See the following illustration:



 $\circ~$ **EXPORT AS CSV** - Save the report in CSV format. The following options are available:

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- Export all data Export all data to CSV format.
- Export only visible data Export only data that is visible on the page to CSV format, limited by the Filter Options and any search criteria.
- Export only selected data Export only data that has been selected on the page to CSV format.
- Status Bar The status bar at the bottom of the Report Generator Tool displays the following information:
 - The type of report generated.
 - The number of records generated.
 - The report's time period.
 - The date/time that the report was generated.

See the following illustration for an example:



Keystroke Summary Report

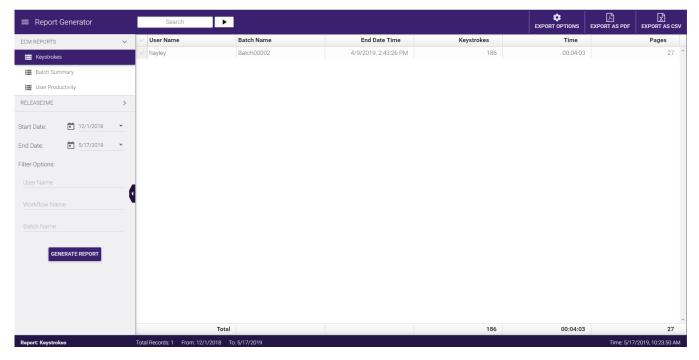
The Keystroke Summary Report records the following information:

- User Name The name of the DP Web logged-in user.
- Batch Name The name of the batch that was indexed.
- End Date Time The date/time that the batch was submitted.
- **Keystrokes** The number of keystrokes that were entered for that batch.
- Time The amount of time it took to index that batch.
- Pages The number of pages that were indexed.

At the bottom of the report, the following information is recorded:

- Total number of keystrokes.
- Total number of time spent.
- Total number of pages.

See the following illustration for an example:



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Batch Summary Report

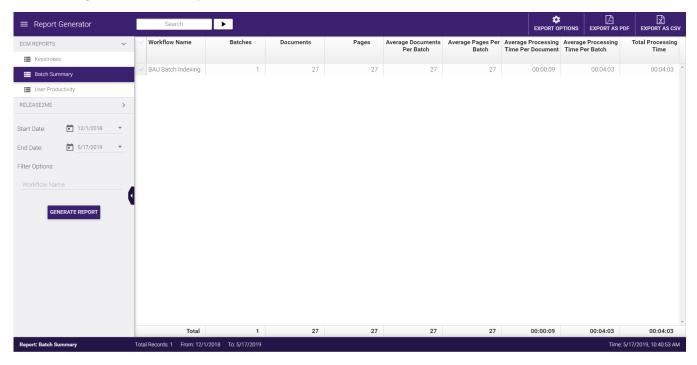
The Batch Summary Report records summary information about the batches that were processed, including the following information:

- Workflow Name The name of the workflow that was used to process a batch.
- Batches The number of batches that were processed by the workflow. Please note that this number increments only when a new batch is submitted to the workflow.
- Documents The total number of documents that were processed by the workflow.
- Pages The total number of pages that were processed by the workflow.
- Average Documents Per Batch The average number of documents within each batch.
- Average Pages Per Batch The average number of pages within each batch.
- Average Processing Time Per Document The average time that it took the operator to process (index/verify) each document.
- Average Processing Time Per Batch The average time that it took the operator to process (index/verify) each batch.
- Total Processing Time The total amount of time that it took the operator to process (index or verify) all documents.

At the bottom of the report, the following information is displayed:

- Total number of batches included in the report.
- Total number of documents included in the report.
- Total number of pages included in the report.
- · Average number of documents in all batches.
- Average number of pages in all batches.
- Average processing time for all documents.
- · Average processing time for all batches.
- · Total processing time for all batches.

See the following illustration for an example:



User Productivity Report

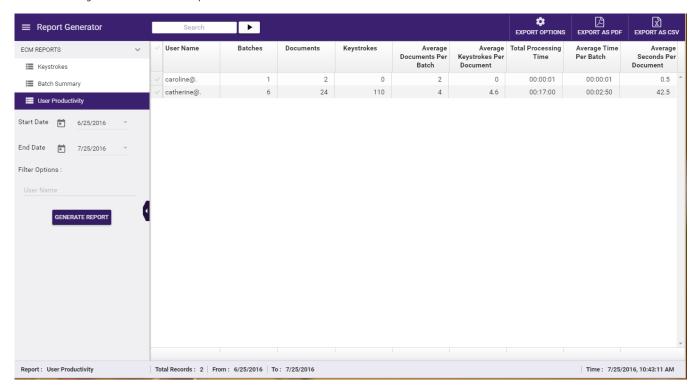
The User Productivity Report records/displays summary information about each operator that has used Batch Indexing and/or Verification tools in DP Web, including the following:

• User Name - The name of the logged-in user that processed a batch.

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- Batches The number of batches that were processed by the user.
- Documents The total number of documents that were processed by the user.
- Keystrokes The total number of keystrokes that were entered by the user.
- Average Documents Per Batch The average number of documents that were processed by the user.
- Average Keystrokes Per Document The average number of keystrokes that were entered by the user.
- Total Processing Time The total amount of time that it took the user to process (index or verify) all documents.
- · Average Time Per Batch The average time it took the user to process a batch.
- · Average Seconds Per Document The average number of seconds it took the user to process each document.

See the following illustration for an example:



Release2Me Reports

To generate reports on the printing activity of your business or organization, select the **Release2Me** tile on the Report Generator page. The option for Release2Me Reports will only be enabled when Release2Me Device Licenses are activated. The following types of reports can be dynamically created:

- Executive Report
- User Report
- Device Report

You can use the controls on the left hand side of the page to customize each report. Do the following:

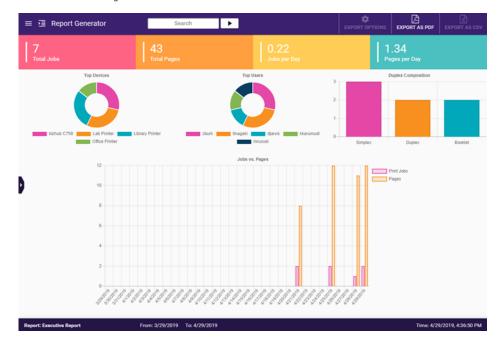
- 1. Specify a time frame for the report using the Start Date and End Date controls.
- 2. Choose one or more of the following filters:
 - Users To run a report on printing activity of a specific user or group of users, enter the full name of the user(s) in the Users field. Multiple
 names must be separated by a comma. To exclude the specified user(s) from the report, check the Exclude box below the Users field.
 - Devices To run a report on the usage of a specific device or group of devices, enter the device name in the **Devices** field. Multiple device
 names must be separated by a comma. To exclude the specified device(s) from the report, check the **Exclude** box below the Devices field.
 - Documents To run a report on a specific document or group of documents, enter the full document name (including file type) in the
 Documents field. Multiple document names must be separated by a comma. To exclude the specified document(s) from the report, check
 the Exclude box below the Documents field.
- 3. Choose the type of report that you want to generate from the **Display Type** drop-down list. You can choose to display the data in a visual format with colorful graphs, bar, column, and doughnut charts, etc., or in a tabular format.

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4. Select the **GENERATE REPORT** button.

Visual Report

When selecting the Visual Report display type, your organization's data will be displayed using color graphs, bar, column and doughnut charts, etc. as shown in the following illustration:



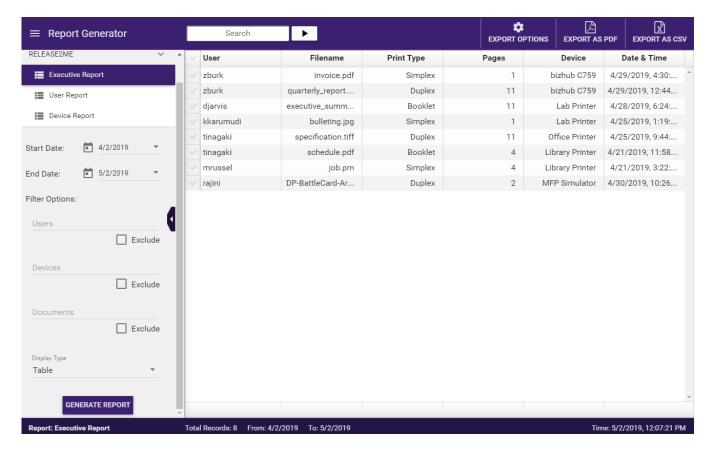
Visual Reports provide a summary of the total job and pages along with daily averages. In addition, using Visual Reports you can view your organizations top devices and users as well as the composition of print jobs using Release2Me including whether or not the job was printed simplex, duplex or as a booklet.

Using the **EXPORT AS PDF** button in the upper right corner, you can choose to export your Visual Report as a PDF file.

Table Report

When selecting the Table Report display type, your organization's Release2Me data will be displayed in a tabular format as shown in the following illustration:

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A Table Report records/displays summary information about each print job that has been released using the Release2Me node.

To customize the data in the Table Report, select the **EXPORT OPTIONS** button in the upper right hand corner. When the dropdown opens, you may enable or disable a column header. Then, use the **EXPORT AS PDF** button or the **EXPORT AS CSV** button to export your Table Report.

Executive Report

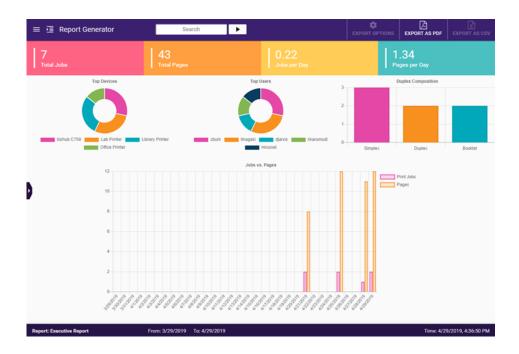
The Executive Report provides users with a thorough analysis of overall printing activity, including the following information:

- Total number of print jobs submitted.
- Total number of pages printed.
- Average number of print jobs submitted per day.
- Average number of pages printed per day.
- The top devices used.
- The top users printing.
- A comparison of simplex, duplex, and booklet printing.

To build this report, select the **Executive Report** option from the left hand menu.

See the following illustration for an example:

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User Report

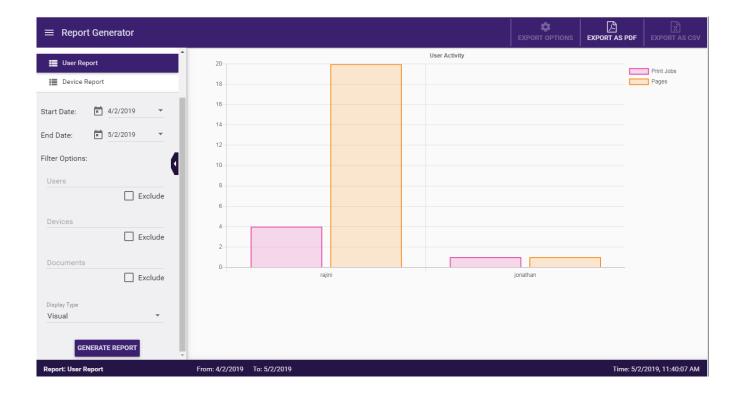
The User Report provides information on user activity, allowing you to compare specific users or track the activity of a specific user. The User Report includes the following data:

- The name of the logged-in user that released the print job.
- The total number of print jobs.
- The total number of pages.
- The % of total jobs.
- The % of total pages.

To build this report, select the $\textbf{User}\ \textbf{Report}$ option from the left hand menu.

See the following illustration for an example:

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Device Report

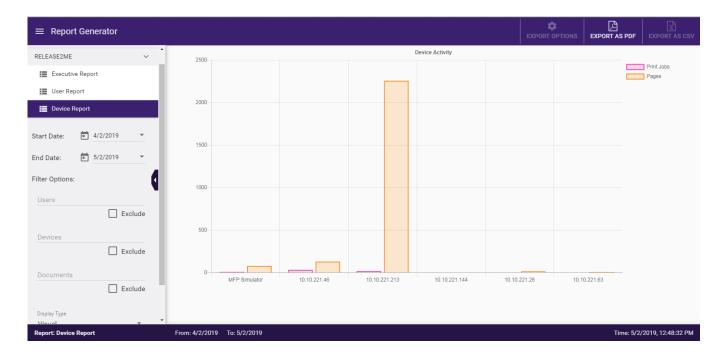
The Device Report provides information on device usage, allowing you to compare print activities by device or analyze a particular printer. The Device Report includes the following data:

- $\bullet\,$ The name of the logged-in user that released the print job.
- The total number of print jobs.
- The total number of pages.
- The % of total jobs.
- The % of total pages.

To build this report, select the **Device Report** option from the left hand menu.

See the following illustration for an example:

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RightFax Report

To generate reports on data captured by the **RightFax Connector** node, select the RightFax Report tile on the Report Generator page. Note that this tile only appears if the RightFax Connector license is active on your system.



You can use the controls on the Configuration panel on the left side of the page to customize each report. If you retain the default configuration settings, all available data within the specified date range appears in the report. You have the following configuration options:

- Start Date The report generates data from the date range you specify here and at the End Date field. The default start date is 30 days prior to the current date. To change the date range, specify a different date here and/or at the End Date field.
- End Date The report generates data from the date range you specify here and at the Start Date field. The default end date is the current date. To change the date range, specify a different date here and/or at the Start Date field.
- **Filter Options** To restrict the report output to specified criteria, use one or more of the following filters. Each filter supports the " * " and " ? " wildcards. In addition, for each filter option, an **Exclude** option is available where you can exclude the specified criterion from the report. If you leave the Exclude box blank, the report includes any specified criterion.
 - Process ID To restrict the report to a certain Process ID, specify the ID here.

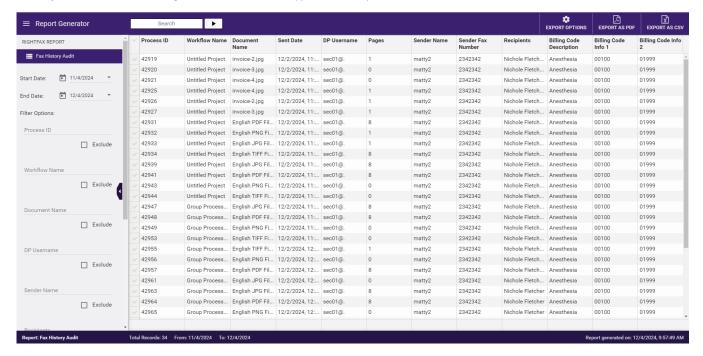
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- Workflow Name To restrict the report to a specific RightFax workflow, specify the workflow here.
- Document Name To restrict the report to a specific document name, specify the name here.
- DP Username To restrict the report to a specific Dispatcher Phoenix user, specify the user here.
- Sender Name To restrict the report to a specific RightFax sender name, specify the name here.
- Recipients To restrict the report to a specific RightFax recipient name, specify the name here.
- Billing Code Description To restrict the report to a specific RightFax Billing Code Description, specify the description here.
- Billing Code Info 1 To restrict the report to specific information in the Billing Code's first field, specify it here.
- Billing Code Info 2 To restrict the report to specific information in the Billing Code's second field, specify it here.

Note: Multiple filters of the same type can be applied by separating the filter criteria with commas. For example, "Workflow name 1, Workflow name 2".

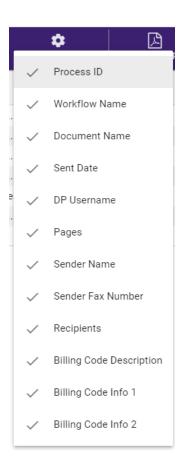
Tool Bar

Once you generate a report, the Tool bar at the top of the page activates. You can use the Tool bar to search through the report and save the report in a variety of formats. In the following illustration, the Tool bar appears at the top:



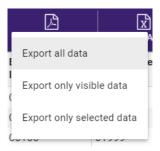
- Search To filter the records displayed on the screen by a specified string, enter the string then click the **Arrow** button. The string you enter must exactly match the contents of at least one cell in the table. Otherwise, no results appear. To release the current filter, empty the Search field then click the **Arrow** button.
- Export Options To filter the columns in the report, click this button to display a list of columns in the selected report. Checked columns appear in the snapshot on the screen as well as in the exported report. To exclude a column, remove the check. The following illustration shows the options for the Classification Summary report:

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- EXPORT AS PDF Use this option to save the report in PDF format. The following options are available:
 - Export all data Export all data to PDF format, including data filtered out of the page view.
 - Export only visible data Export only data for the rows that are visible on the page to PDF format, limited by the Filter Options and any search criteria. Note that data from columns that are not visible will be included as long as the row is visible.
 - Export only selected data Export only data that has been selected on the page to PDF format.

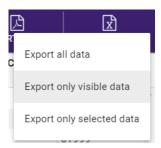
See the following illustration:



- EXPORT AS CSV Use this option to save the report in CSV format. The following options are available:
 - Export all data Export all data to CSV format, including data filtered out of the page view.
 - Export only visible data Export only data for the rows that are visible on the page to CSV format, limited by the Filter Options and any search criteria. Note that data from columns that are not visible will be included as long as the row is visible.
 - Export only selected data Export only data that has been selected on the page to CSV format.

See the following illustration:

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Status Bar

Once you generate a report, the status bar appears at the bottom of the Report Generator Tool, displaying the following information:

- The type of report generated.
- The number of records generated.
- The report's time period.
- The timestamp for the report.

System Settings

Dispatcher Phoenix Web's System Settings Tool allows administrators manage important configuration options for the application. To get started, do the following:

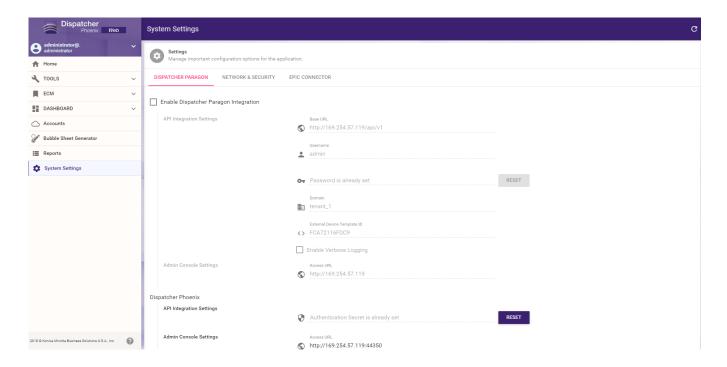
- 1. Log into **Dispatcher Phoenix Web** with your **Windows User Credentials**.
- 2. Select the **System Settings** tile.

See the following illustration for an example:



Dispatcher Paragon

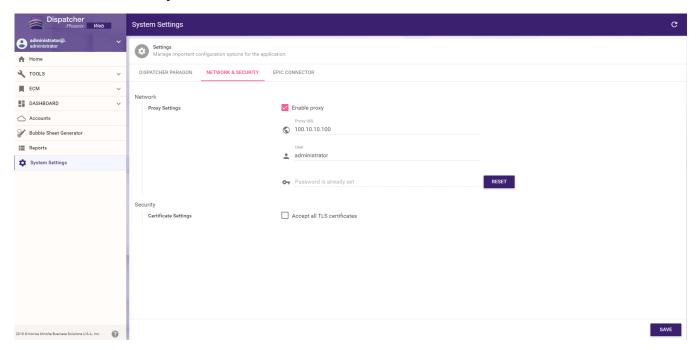
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Note: Fields that contain sensitive information have a Reset button that allows you to enter a new value.

For more information on configuring Dispatcher Paragon, click here.

Network & Security



The **Network & Settings** allow you to configure the following settings:

Proxy Settings

- Enable Proxy: Select this checkbox to enable the use of a proxy server.
- Proxy URL: IP Address / Hostname of the Proxy Server.
- $\mbox{\bf User:}$ If the proxy server requires authentication, enter username.
- $\bullet \ \ \textbf{Password} \colon \text{If the proxy server requires authentication, enter password}.$

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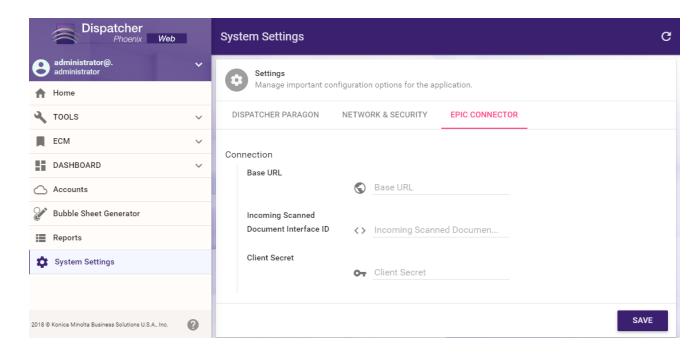
Certificate Settings

• Accept all TLS certificates: Select this checkbox to accept all third-party SSL / TLS certificates.

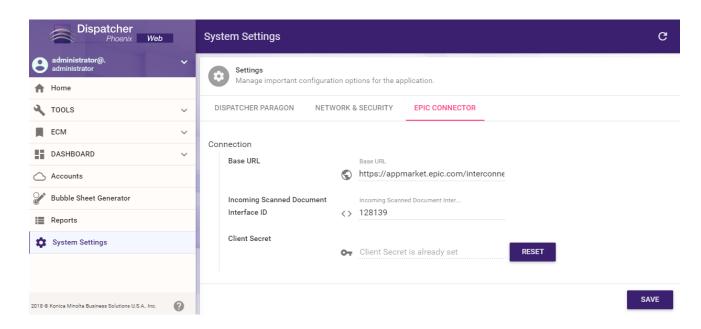
Epic Connector

In order to add an Epic Account to your **Dispatcher Phoenix Web Accounts** and begin using the **Epic Connector**, you must first add the necessary system settings for Epic. To update the Epic system settings, do the following:

- 1. In Dispatcher Phoenix Web, select the **System Settings** tile.
- 2. Select the **Epic Connector** tab, as in the following illustration:



3. Enter the Base URL, Incoming Scanned Document Interface ID, and Client Secret. Then, select Save, as in the following illustration:



4. You may now add an Epic account using the previous steps under Adding Accounts.

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Batch Indexing

Overview of Batch Indexing

Dispatcher Phoenix Web's Batch Indexing app allows users to index their documents before storing them in a document management system for search and retrieval purposes later. Dispatcher Phoenix supports manual indexing using shortcut keys. In addition, index fields can also be prepopulated with data via OCR extraction and database lookups.

Batch Indexing is available as an optional add-in or part of the Batch Indexing Package and is user-license based.

To start using the Batch Indexing app, make sure that you have created a Dispatcher Phoenix workflow that includes a Batch Indexing node in it.

Batch Indexing Process Node

The Batch Indexing node is the Dispatcher Phoenix process node that is used to send documents to DP Web's Batch Indexing app.

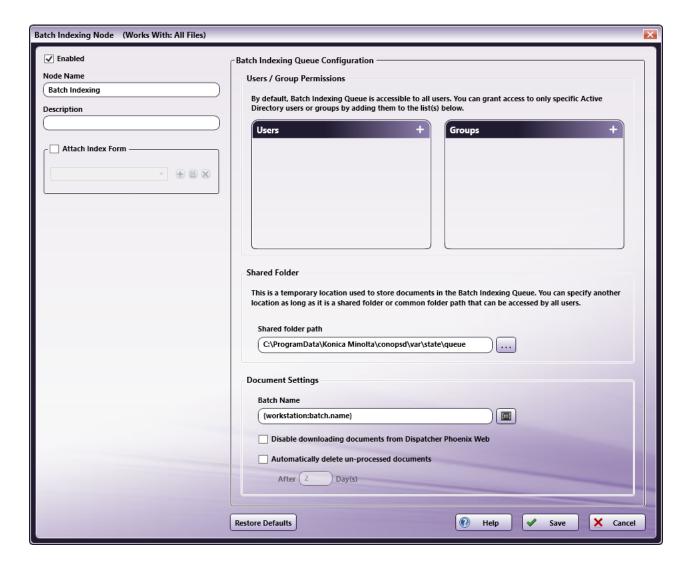
To configure the Batch Indexing process node, do the following:

1. Drag-drop a **Batch Indexing** process node onto the Workflow Builder Tool's work area. The Batch Indexing icon resembles the following illustration:



2. Double-click on the **Batch Indexing** icon to open up its node properties window. The Batch Indexing Node properties window appears, as in the following illustration:

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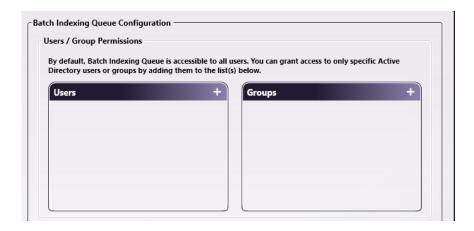
- 3. The Batch Indexing node includes standard Dispatcher Phoenix fields that you can customize, as follows:
- Make sure the **Enabled** box is checked so that the process will run.
- In the **Node Name** field, enter a meaningful name for the Batch Indexing node.
- In the **Description** field, enter a description for the Batch Indexing node. This is not required, but can be helpful with multiple process nodes. If the description is long, you can hover the mouse over the field to read its entire contents.
- When you are done, select the **Save** button to keep your Batch Indexing settings. You can also select the **Help** button to access help and select the **Cancel** button to exit the window without saving any changes.

Configuring Users/Group Permissions

You can grant Batch Indexing Queue access to specific Active Directory users or groups. Click on the + sign to access the Active Directory "Select Users" or "Select Groups" dialog.

Note: By default, all users can access batches in the Batch Indexing Queue.

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Shared Folder Path

By default, documents for indexing are temporarily stored in the C:\ProgramData\Konica Minolta\conopsd\var\state\queue directory. You can choose to modify this default location by clicking on the **ellipsis** button.

Note: This must be a folder that can be accessed by all users (a shared folder or common folder path).



Document Settings

When setting up your workflow for Batch Indexing, you can also specify settings for the documents in the batch. The following options are available:

- Batch Name By default, the Batch Indexing page will display the batch name that was specified when the batch was originally set up in the Workstation using the following Workstation metadata: ({workstation:batch.name}). However, you can enter other metadata in this field to override the batch name that was configured in the Workstation. For example, if you want the batch name to be what was selected or entered at the Index Form on the MFP, you could enter Index Form metadata in this field. To access a list of metadata that can be added to the batch name, click on the Metadata Browser button next to the Batch Name field.
- Disable downloading documents from Dispatcher Phoenix Web Dispatcher Phoenix Web's Batch Indexing app includes a Download Document button on its tool bar. To disable this option from being displayed for your workflow, check this box.
- Automatically delete un-processed documents Dispatcher Phoenix can automatically remove any documents that have not been indexed from the Batch Indexing queue after a user-specified period of time.



Index Form

The Batch Indexing process node must have an **index form** associated with it. This index form appears when the workflow is selected in DP Web's Batch Indexing app.

Do the following:

- 1. Check the **Attach Index Form** box.
- 2. Click on the + button to open the Index Form Builder.

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- 3. On the Create new index form window, select the **Blank Index Form** button.
- 4. Using the Index Form Builder, drag-drop the index fields that you want displayed in the Batch Indexing app.
- 5. Save the Index Form Builder when you are done.

Restore Defaults

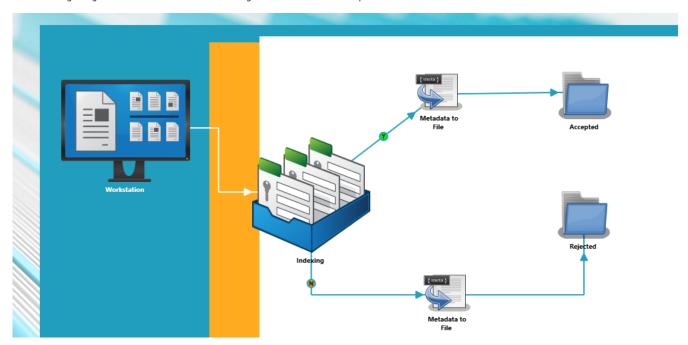
The Batch Indexing process node includes a Restore Defaults button that allows you to revert the settings back to the node's original settings, if necessary.

Configuring a Batch Indexing Workflow

The Batch Indexing node can be connected to the rest of the workflow via **Yes** and **No** transitions. When indexing documents via the DP Web Batch Indexing app:

- Selecting the RELEASE or RELEASE ALL button routes indexed documents via the Yes transition.
- Selecting the **REJECT** button routes documents via the **No** transition.

The following image illustrates what a Batch Indexing workflow created in Dispatcher Phoenix could look like:



This workflow is set up to receive files submitted from the Dispatcher Phoenix Workstation and send them to the Batch Indexing queue. Once indexing is complete, documents in the batch along with XML files that include the index information entered for each document are sent to the "Accepted" folder. Documents that have been rejected during DP Web Batch Indexing are stored in the "Rejected" folder.

Using the Batch Indexing App

To index your documents using DP Web's Batch Indexing app, do the following:

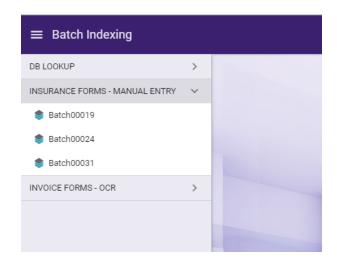
- 1. Log into Dispatcher Phoenix Web (with the same credentials used when logging into the Dispatcher Phoenix client application).
- 2. Select the **Batch Indexing** card, as in the following illustration:

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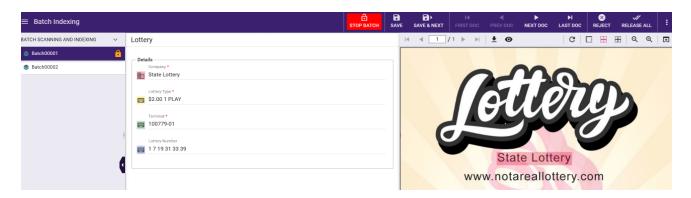


The Batch Indexing page will appear, listing all Batch Indexing workflows that have had batches submitted to them.

3. Select a workflow to view a list of batches that were submitted to that specific workflow, as in the following illustration:

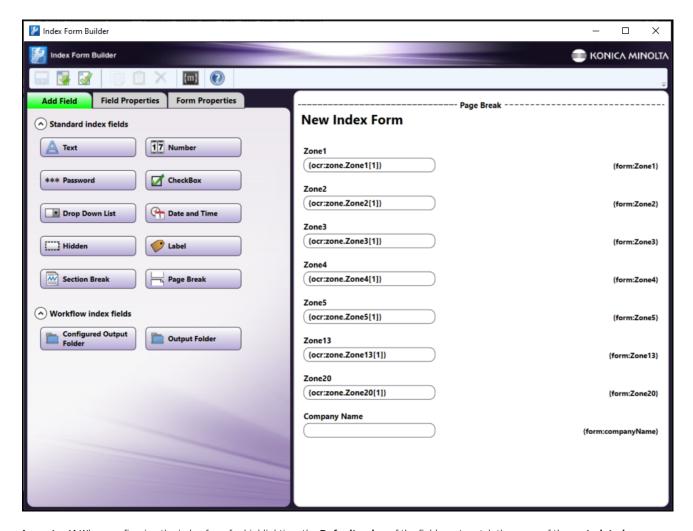


4. Select a batch to begin indexing documents in that batch. The workflow's Index Form will appear, allowing you to enter index information about each document, along with a preview of the page that is being indexed. Fields identified in the Forms Processing or Advanced OCR nodes are highlighted in different colors to aid in identification and data verification. Selecting a field hides the colors for other fields. See the following illustration for an example:

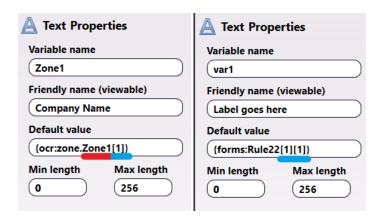


Note: In order to take advantage of the field highlighting feature, the Batch Indexing node must be configured with an Index Form that identifies the fields and expected metadata pairing, as in the following illustration:

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Important! When configuring the index form for highlighting, the **Default value** of the field must match the name of the **metadata key** (underlined in red). For metadata gathered from the **Advanced OCR** node, the Default value must include the page number for the metadata (the [#] underlined in blue). For metadata gathered from the **Forms Processing** node, the Default value must include the page number and the occurrence for the metadata (the [#][#] underlined in blue).



You can customize this view to best suit your work environment. For example, you can resize the batch list panel, index form, and/or document viewer by drag-dropping using your mouse.

Locking the Batch

Before you begin indexing documents, you must first select the **START BATCH** button. This will prevent other users from opening/indexing the same batch.

Once you are finished indexing the documents, select the STOP BATCH button to release the exclusive lock that you had on the batch.

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Navigating through Index Fields

Once you have an exclusive lock on the batch, you can enter the appropriate index information in each field. The Index area provides support for keyboard shortcuts to speed indexing time. You can press the **Tab** or **Enter** key to move from field to field. When you are done indexing the page, you can go to the next page in the document by using the navigation keys at the top of the document viewer or pressing **CTRL** $+ \rightarrow$.

Saving Indexing Field Information

- SAVE At any time in the indexing process, you can save the indexed information entered without having to submit the batch or document by selecting the SAVE button on the toolbar or pressing CTRL + S. The document will remain in the Batch Indexing Queue.
- SAVE & MOVE To save the indexed information that has been entered and move to another document in the batch (but not submit the document or batch to Dispatcher Phoenix), you can select the SAVE & MOVE button or press CTRL + Enter. The document will remain in the Batch Indexing Queue.

Releasing Documents

- RELEASE You can release the current document with saved index information, instead of the entire batch, by selecting the RELEASE button or
 pressing CTRL + 9. The current document will leave the Batch Indexing Queue and be submitted to the Dispatcher Phoenix workflow for further
 processing, routing, and storing.
- **RELEASE ALL** When all the documents in the batch have been indexed, you can select the **RELEASE ALL** button or press **F9**. All the documents in the batch will then leave the Batch Indexing Queue and be submitted to the Dispatcher Phoenix workflow for further processing, routing, and storing.

Rejecting Documents

• **REJECT** - If you need to reject a document from the batch, you can select the **REJECT** button or press **CTRL** + **Delete**. The document will leave the Batch Indexing Queue and be sent back to the Dispatcher Phoenix workflow (from the Batch Indexing node's **No** transition).

Deleting Documents/Batches

- **DELETE DOC** You can permanently delete a document from a batch by selecting the **DELETE DOC** button. The document will leave the Batch Indexing Queue. It will not be sent to Dispatcher Phoenix.
- **DELETE BATCH** You can permanently delete a batch from the Batch Indexing Queue by selecting the **DELETE BATCH** button. The batch will leave the Batch Indexing Queue. It will not be sent to Dispatcher Phoenix.

Sticky Fields

The Batch Indexing app supports "sticky" fields. A sticky field is a field that retains its value after the first time the value is entered. When the Index Operator moves to the next page, the value entered in the field will be automatically applied to the same field.

Database Lookups

The Batch Indexing app supports database lookups, provided the fields on the index form have been set up for that functionality.

Navigation

To navigate through pages and documents, you can use the Batch Indexing page's tool bar buttons or keyboard shortcuts.

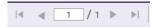
- To go to the first document in the batch, select the FIRST DOC button on the tool bar or press CTRL + M
- To go to the previous document in the batch, select the PREV DOC button on the tool bar or press CTRL + ,
- To go to the next document in the batch, select the **NEXT DOC** button on the tool bar or press **CTRL** + .
- To go to the last document in the batch, select the **LAST DOC** button on the tool bar.

See the following screenshot for an illustration of the Batch Indexing Tool Bar's navigation buttons:



The Document Viewer's toolbar also includes controls for navigating through pages in a document:

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The **Arrow Controls** allows you to navigate through the various pages in the selected document. You can also go to a specific page in the document by entering a page number in the field provided and pressing the **Enter** key.

Please note that keyboard shortcuts are also available, as listed below:

• Go to First Page: CTRL + ↑

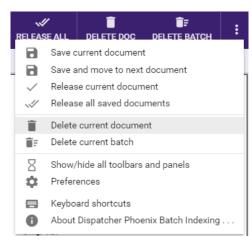
• Go to Previous Page: CTRL + ←

Go to Next Page: CTRL + →

• Go to Last Page: CTRL + \downarrow

Additional Menu Options

The Three Vertical Dots on the tool bar provides access to additional menu options, as follows:



- Save current document Save the current document's indexing information.
- Save and move to next document Save the current document's indexing information and display the next document in the queue.
- Release current document Release the current document from the Batch Indexing Queue.
- Release all saved documents Release all saved documents from the Batch Indexing Queue.
- Delete current document Delete the current document.
- Delete current batch Delete the current batch.
- Show/hide all toolbars and panels Toggle to change the appearance of the Batch Indexing page.
- · Preferences Specify toolbar and layout options.
- · Keyboard shortcuts Display all keyboard shortcuts available for use when indexing documents.
- About Dispatcher Phoenix Batch Indexing... View version information about the Batch Indexing app.

Document Viewer

The Document Viewer area displays the current document in the batch that is being indexed. You can adjust the width of the Document Viewer to suit your preferences. You can also move the Document Viewer to a new browser page, which can then be dragged-dropped to a secondary monitor.

The Document Viewer includes a tool bar that provides navigation and zoom controls.



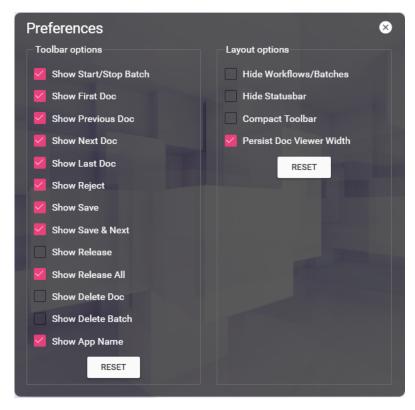
- Arrow controls Navigate through the various pages in the selected document, or enter a page number in the field provided and press the Enter key to go to a specific page in the document.
- **Download** Download the current document and view it in its native viewer. Please note that this option can be hidden when setting up the Batch Indexing processing node in the Dispatcher Phoenix workflow.
- Show/Hide OCR Zone Select this to toggle on or off the OCR zone highlight.

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- Rotate Rotate the current document 90° to the right. Selecting this option multiple times will continue rotating 90° each time. The orientation is applied to all documents in the batch. Orientation is only for the document preview; documents return to their original orientation after the batch has been released.
- Zoom 100% Magnify the view of the current document to 100%.
- Fit to Width Fit the width of the document in the Preview area.
- Fit Whole Page Fit the entire page of the document in the Preview area.
- Magnifying glass Zoom in and out of the document in the Preview area. You can also move the Document Viewer to a new browser and dragdrop that browser to a secondary monitor, if necessary.
- Open in new browser Display Preview area in a new browser page which can then be dragged onto a second monitor for convenient display purposes.

Preferences

The Preferences pop-up, accessible from the **Three Vertical Dots** button on the tool bar, provides you with a list of tool bar and layout options that you can choose from to customize the look of the Batch Indexing page.



After you select the various buttons that you want to appear and/or specific layout options, you can click on the **X** button to close the pop-up window or select the **RESET** buttons to revert the preferences back to their default settings.

Tool Bar Options

You can check the following boxes:

- Show First Doc Displays the FIRST DOC button on the tool bar.
- Show Previous Doc Displays the PREV DOC button on the tool bar.
- Show Next Doc Displays the NEXT DOC button on the tool bar.
- Show Last Doc Displays the LAST DOC button on the tool bar.
- **Show Reject** Displays the REJECT button on the tool bar.
- Show Save Displays the SAVE button on the tool bar.
- Show Save & More Displays the SAVE & MORE button on the tool bar.
- ${\bf Show\ Release}$ Displays the RELEASE button on the tool bar.
- ${\bf Show\ Release\ All}$ Displays the RELEASE ALL button on the tool bar.

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- Show Delete Doc Displays the DELETE DOC button on the tool bar.
- Show Delete Batch Displays the DELETE BATCH button on the tool bar.
- Show App Name Displays the words "Batch Indexing" on the top, left-hand side of the page.

Layout Options

You can also customize the layout of the Batch Indexing page by checking the following boxes:

- Hide Workflows/Batches- Remove the list of batches/workflows from the left hand side of the Batch Indexing page.
- **Hide status bar** Remove the status bar from the bottom of the Batch Indexing page. This status bar displays the name of the workflow, the name of the selected batch, the document and page that you are currently viewing, as well as the document name and file size.
- Compact toolbar Shrink the appearance of the toolbar.
- Persist Doc Viewer Width Any changes to the width of the Document Viewer will be saved and will remain the next time batches are selected in the Batch Indexing app.

Keyboard Shortcuts

Time-saving keyboard shortcuts are available for you when indexing documents. See the following list:

Show / Hide Shortcuts

```
• Show / Hide Help: ? or CTRL + `
```

• Show / Hide Toolbar and Batch Panel: CTRL + 7

• Show / Hide About Screen: CTRL + i

• Show / Hide Preferences Screen: CTRL + o

• Close Keyboard Shortcut dialog: ESC

Navigation Shortcuts

```
• Go to First Page: CTRL + ↑
```

• Go to Previous Page: CTRL + \leftarrow

• Go to Next Page: CTRL + →

• Go to Last Page: CTRL + ↓

• Go to First Document: CTRL + M

• Go to Previous Document: CTRL + ,

• Go to Next Document: CTRL + .

• Go to a Specific Document in the Batch: CTRL + G

• Go to the Last Document: CTRL + /

Indexing Shortcuts

- Toggle Lock/Unlock Batch: CTRL + L

• Reject Document: CTRL + Delete

• Save Current Document: CTRL + S

• Save and Move to Next Document: CTRL + Enter

• Save and Move to Next Unsaved Document: CTRL + ↑ + Enter

• Save and Release Document: CTRL + 9

• Release all Saved Documents: F9

Document Preview Shortcuts

• Zoom in by 100%: CTRL + 1

• Resize to Fit Width of Page: CTRL + 2

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• Resize to Fit Whole Page: CTRL + 3

Zoom out: CTRL + 4
 Zoom in: CTRL + 5

Document Viewer Shortcuts

• Toggle Document Viewer: F8

Customize Layout Shortcuts

• Toggle Batch/Workflow Panel: F4

• Reset Layout: CTRL + 0

Batch Manager

Batch Manager

Dispatcher Phoenix Web's Batch Manager app allows administrators to view the progress of each batch and forcibly release any batches that have been left locked by users. Please note that releasing a lock from a batch is only recommended when another user needs to take over the batch.

To access the Batch Manager app, select the BATCH MANAGER card on Dispatcher Phoenix Web's home page, as in the following illustration:



The Batch Manager page resembles the following illustration:



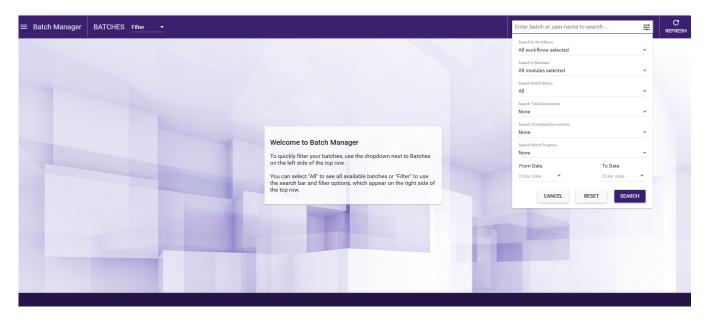
To begin, select one of the options from the drop-down menu in the upper-left corner:

- All Displays all batches. Note that for organizations with large numbers of batches, loading all batches can take several seconds.
- Filter Displays the Search and Filter options. Enter a search term or define filter terms to display a smaller set of batches.

Search and Filter Batches

You can filter the batch list by using the **Search** field at the top right side of the window. This field uses type ahead search functionality to allow you to filter the list based on date, batch name, module, workflow, and username. You can define multiple search criteria for more granular results.

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On the right side of the Search bar is the Filter icon. Select the Filter icon to display the complete set of filter criteria. Filter criteria include:

- Search in Workflows Refine the list of batches by the workflows from which the batches were generated.
- · Search in Modules Refine the list of batches by either the Batch Indexing or Verification modules.
- Search Batch Status Refine the list of batches by their status: All, Locked, or Unlocked.
- Search Total Documents Refine the list of batches by the total number of documents in the batch. You can select None, Greater than, Less than, or Equals to and enter a number in the field provided.
- Search Completed Documents Refine the list of batches by the total number of completed documents in the batch. You can select None, Greater than, Less than, or Equals to and enter a number in the field provided.
- Search Batch Progress Refine the list of batches by the overall percentage of completion of the batch. You can select None, Greater than, Less than, or Equals to and enter a percentage in the field provided (For example, 60% completed).
- From Date Refine the list of batches by date. Select the earliest date here.
- To Date Refine the list of batches by date. Select the most recent date here.

Three buttons appear at the bottom of the filter dropdown:

- Cancel Close the drop-down and do not search.
- Reset Clear all filter criteria.
- Search Use the configured filter criteria to generate a list of batches.

Using the Batch Manager

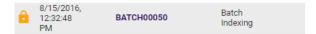
On this page, all currently active batches are displayed with the following information:

- Lock icon This symbol illustrates whether the batch has been started by a user or not.
- Date The date the batch was submitted.
- Batch The name of the batch.
- Module The application that is processing the batch (Batch Indexing or Verification).
- Workflow The name of the workflow that the batch was submitted to.
- User The name of the user that is processing the batch. This user has an exclusive lock on the batch.
- Total Docs The number of documents in the batch.
- Completed The number of completed documents in the batch.
- Progress A graphical representation of the batch's progress.

Release Batch

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To forcibly release a batch from a user so that it can be accessed by other users, click the **lock** icon next to the batch that you are interested in. See the following illustration for an example:



A confirmation message will appear. Once you select **Yes** on the message, the batch will no longer be locked to that user and will be accessible for other users to index/verify.

Organize Batches

You can sort the batch display by clicking on a column (Date, Batch, Module, Workflow, User, Total Docs, Completed, Progress). For example, to sort all batches by their progress status, click on the Progress column, as in the following illustration:



Access Batches

To access a batch in its module (Batch Indexing or Verification), click on a batch name.

Refresh Batches

To refresh the batch list, click on the **Refresh** button at the top right side of the window.

User Licenses

Overview

Dispatcher Phoenix Web's User Licenses app allows administrators to delete/release locked user licenses from the following modules:

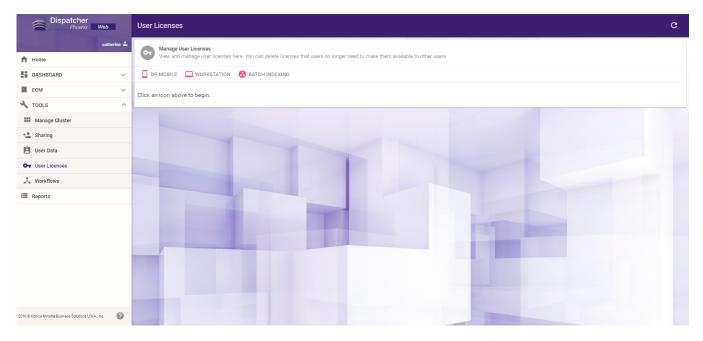
- DP Mobile
- Workstation
- · Batch Indexing

To access the User Licenses app, select the **USER LICENSES** card on Dispatcher Phoenix Web's home page, as in the following illustration:



The User Licenses page resembles the following illustration:

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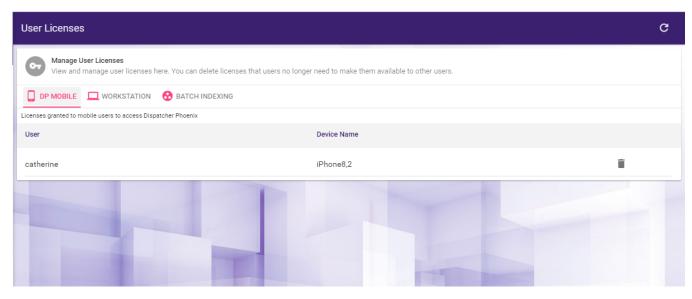
On this page, you can click on the DP Mobile, Workstation, or Batch Indexing links to view the licenses that are being used for each module.

DP Mobile

Each Dispatcher Phoenix Mobile user license allows a user to use the app on up to 3 devices. To manage DP Mobile user licenses, click on the **DP Mobile** link. The following information will appear about each DP Mobile license:

- User name
- · Device name

See the following illustration for an example:



To remove a license, click the **Delete License** icon next to the user license you are interested in.

Workstation

Once Dispatcher Phoenix Workstation is installed on a PC, the user that is logged into Workstation claims a license. Log in information is configured using the **Options window in the Workstation**.

That license is tied to that computer (one user license per device). In other words, a user cannot log into Workstation from one computer and then log into Workstation from a different computer.

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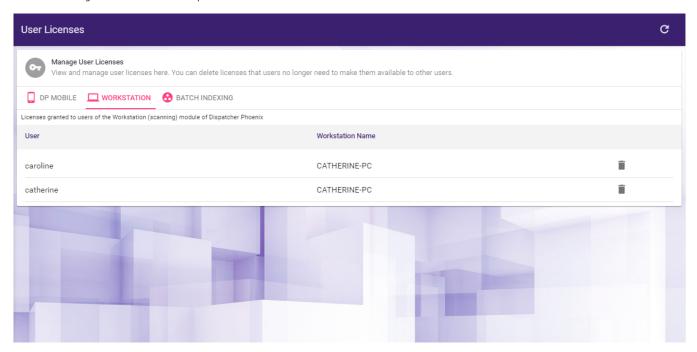
Note: Admins can configure settings so that a license that was previously tied to a particular computer can be deleted and used on another computer.

If a customer orders just a User License, then the Workstation license will be included and vice versa.

To release a user from that computer, click on the Workstation link. The following information will appear about each license:

- · User name
- · Computer name

See the following illustration for an example:



To release a license, click the **Delete License** icon next to the user license you are interested in.

Batch Indexing

Batch Indexing licensing is associated with a session and not tied to a specific computer. A license will be claimed by the logged-in user once that user has access to a batch. Please note that the user licensing for Batch Indexing is not concurrent; in other words, each named user claims one license. For example, if you have 10 employees who need to perform batch indexing, you need 10 licenses, regardless of how many users are on at the same time.

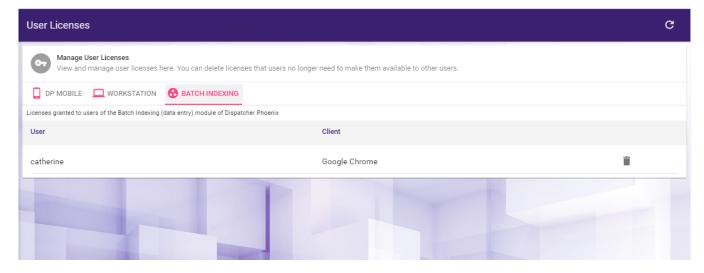
If a customer orders just one User License then the **Batch** license will be included and vice versa.

To release a user from that session, click on the Batch Indexing link. The following information will appear about each license:

- User name
- Client name

See the following illustration for an example:

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To release a license, click the **Delete License** icon next to the user license you are interested in.

Verification

Overview of Verification

Use Dispatcher Phoenix's Verification node, together with Dispatcher Phoenix Web's Verification tool, to check documents in a batch for quality assurance purposes. The Verification node sends documents to the Verification tool in Dispatcher Phoenix Web where you can view and verify or reject the documents in the batch. Before using the Verification tool, first create a Dispatcher Phoenix workflow that includes a Verification processing node, then run the workflow.

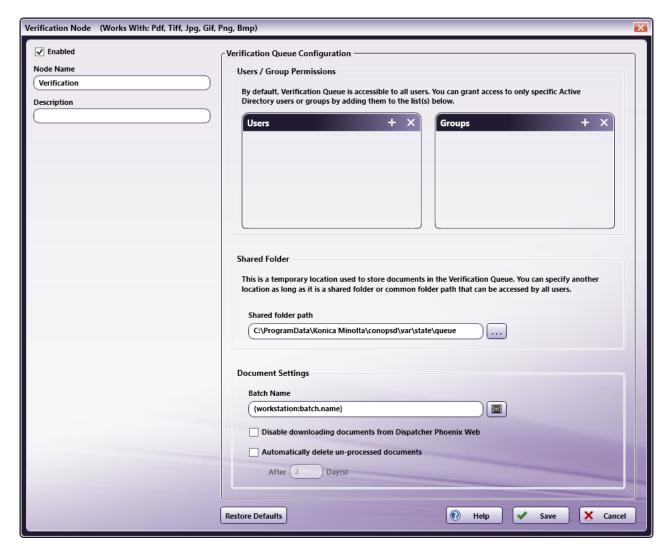
Verification is available as an optional add-in or part of the Batch Indexing Package and is user-license based.

Verification Process Node



To configure the Verification process node, drag-drop a Verification node onto the Workflow Builder Tool's work area and double-click on it. The Verification Node properties window appears, as in the following illustration:

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The following options are available:

- Enabled To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** The node name defaults into this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

- **Restore Defaults** To restore the Verification Queue Configuration properties to default values, click this button. Note that this button affects only items in the Verification Queue Configuration section. It does not affect the Node Name, Description, or Enabled settings.
- Help To access Dispatcher Phoenix Online Help, click this button.
- Save To preserve your node definition and exit the window, click this button.
- Cancel To exit the window without saving any changes, click this button.

Verification Queue Configuration

Use this area to configure the verification queue

Users/Group Permissions

By default, all users can access batches in the Verification Queue. To restrict Verification Queue access to specific Active Directory users or groups, click on the + sign to access the Active Directory "Select Users" or "Select Groups" dialog. To remove specific Active Directory users or groups (if any) from your lists, select the user or group and click the **X** button.

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Shared Folder

By default, documents for verification are temporarily stored in the following directory:

C:\ProgramData\Konica Minolta\conopsd\var\state\queue

You can modify this default location by clicking on the ellipsis button.

Note: This folder must be accessible by all users (that is, a shared folder or common folder path).

Document Settings

• Batch Name - By default, the Verification page displays the batch name that was specified when the batch was originally set up in the Workstation using the following Workstation metadata:

{workstation:batch.name}

You can override the batch name that was configured in the Workstation using any of the following name types:

Name Type	Example
Metadata	{user:domain}
Plain text	ABCD
Metadata and plain text	{workstation:batch:name}-ABCD
Multiple metadata	{Workstation:batch:name}-{user:domain}
Multiple plain text	ABCD-1234

• Browse for metadata - To access a list of metadata that can be added to the batch name, click on this button next to the Batch Name field.

As an example, to use the selection or entry made at the Index Form on the MFP as your batch name, you can enter Index Form metadata in this field

- Disable downloading documents from Dispatcher Phoenix Web Dispatcher Phoenix Web's Verification app includes a Download
 Document button on its tool bar. To disable this option from being displayed for your workflow, check this box.
- Automatically delete un-processed documents To automatically remove any documents that have not been verified from the Verification queue after a user-specified period of time, check this box and specify the time period.

Configuring a Verification Workflow

You can connect the Verification node to the rest of the workflow via Yes and No transitions. When verifying your batch in DP Web:

- Releasing documents or the entire batch routes documents via the **Yes** transition.
- Rejecting documents routes documents via the No transition.



This workflow is set up to receive files submitted from the Dispatcher Phoenix Workstation and send them to the Verification queue. Once an operator has verified the documents and releases them, documents are sent to the "Accepted" folder. Documents that have been rejected during the Verification process are stored in the "Rejected" folder.

Using the Verification Tool

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Accessing Verification

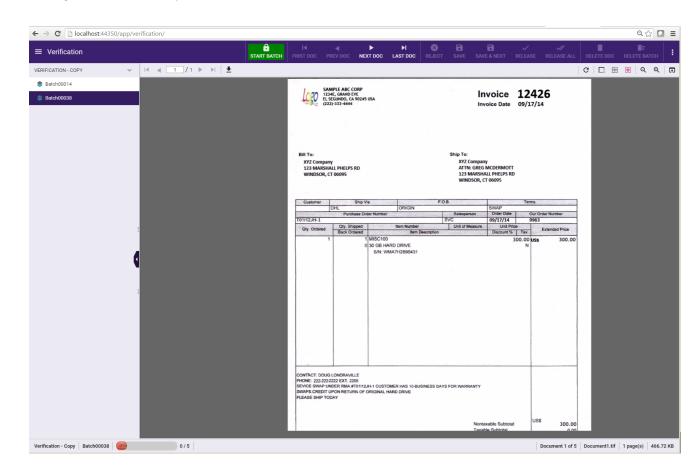
To check the quality of your documents using DP Web's Verification app, do the following:

- 1. Log into Dispatcher Phoenix Web (with the same credentials used when logging into the Dispatcher Phoenix client application).
- 2. Select the **Verification** card, as in the following illustration:



The Verification page will appear, listing all Verification workflows that have had batches submitted to them on the left hand side of the page.

- 3. Select a workflow to view a list of batches that were submitted to that specific workflow.
- 4. Select a batch to begin verifying documents in that batch. The preview area will display the first page of the first document in the batch. See the following illustration for an example:



You can customize this view to best suit your work environment. For example, you can resize the Workflow/Batch list panel and/or click the arrow on the side of the Workflow/Batch list area to hide the batch list completely and only display the preview area.

Verifying Documents

When verifying documents, follow these steps:

Locking the Batch

Before you begin verifying documents, you must first select the **START BATCH** button. This will prevent other users from opening/verifying the same batch.

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Once you are finished verifying the documents, select the STOP BATCH button to release the exclusive lock that you had on the batch.

Saving Documents as "Verified"

- SAVE At any time in the verification process, you can save the document as "verified" by selecting the SAVE button on the toolbar or pressing CTRL + S. The document will remain in the Verification Queue.
- SAVE & MOVE To save the document as "verified" and move to another document in the batch (but not submit the document or batch to Dispatcher Phoenix), you can select the SAVE & MOVE button or press CTRL + Enter. The document will remain in the Verification Queue.

Releasing Documents

- **RELEASE** You can release the current document, instead of the entire batch, by selecting the **RELEASE** button or pressing **CTRL** + **9**. The current document will leave the Verification Queue and be submitted to the Dispatcher Phoenix workflow for further processing, routing, and storing.
- **RELEASE ALL** When all the documents in the batch have been verified, you can select the **RELEASE ALL** button or press **F9**. All the documents in the batch will then leave the Verification Queue and be submitted to the Dispatcher Phoenix workflow for further processing, routing, and storing.

Rejecting Documents

• **REJECT** - If you need to reject a document from the batch, you can select the **REJECT** button or press **CTRL** + **Delete**. The document will leave the Verification Queue and be sent back to the Dispatcher Phoenix workflow (from the Verification node's **No** transition).

Deleting Documents/Batches

- **DELETE DOC** You can permanently delete a document from a batch by selecting the **DELETE DOC** button. The document will leave the Verification Queue. It will not be sent to Dispatcher Phoenix.
- DELETE BATCH You can permanently delete a batch from the Verification Queue by selecting the DELETE BATCH button. The batch will leave the Verification Queue. It will not be sent to Dispatcher Phoenix.

Navigating Through Pages and Documents

To navigate through pages and documents, you can use the Verification page's tool bar buttons or keyboard shortcuts.

- To go to the first document in the batch, select the FIRST DOC button on the tool bar or press CTRL + M.
- To go to the previous document in the batch, select the PREV DOC button on the tool bar or press CTRL + ,.
- To go to the next document in the batch, select the **NEXT DOC** button on the tool bar or press **CTRL** + ..
- To go to the last document in the batch, select the **LAST DOC** button on the tool bar.

See the following screenshot for an illustration of the Verification Tool Bar's navigation buttons:



The Document Viewer's toolbar also includes controls for navigating through pages in a document:



The **Arrow Controls** allows you to navigate through the various pages in the selected document. You can also go to a specific page in the document by entering a page number in the field provided and pressing the **Enter** key.

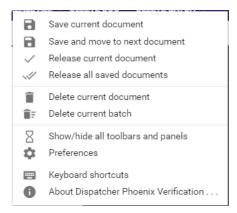
Please note that keyboard shortcuts are also available, as listed below:

- Go to First Page: CTRL + ↑
- Go to Previous Page: CTRL $+ \leftarrow$
- Go to Next Page: CTRL + →
- Go to Last Page: CTRL + \downarrow

Additional Menu Options

The Three Vertical Dots on the tool bar provides access to additional menu options, as follows:

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- Save current document Save the current document's state as 'verified'.
- Save and move to next document Save the current document's state as 'verified' and display the next document in the queue.
- Release current document Release the current document from the Verification Queue.
- Release all saved documents Release all saved documents from the Verification Oueue.
- Delete current document Delete the current document.
- Delete current batch Delete the current batch.
- Show/hide all toolbars and panels Toggle to change the appearance of the Verification page.
- · Preferences Specify toolbar and layout options.
- Keyboard shortcuts Display all keyboard shortcuts available for use when verifying documents.
- About Dispatcher Phoenix Verification... View version information about the Verification app.

Document Viewer

The Document Viewer area displays the current document in the batch that is being verified. You can adjust the width of the Document Viewer to suit your preferences. You can also move the Document Viewer to a new browser page, which can then be dragged-dropped to a secondary monitor.

The Document Viewer includes a tool bar that provides navigation and zoom controls.

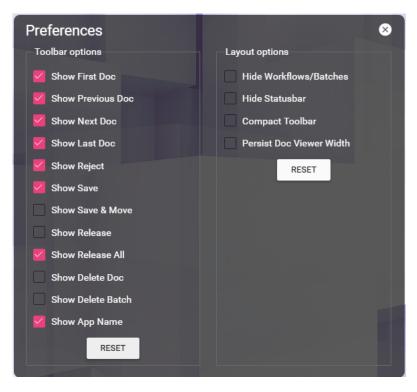


- Arrow controls Navigate through the various pages in the selected document, or enter a page number in the field provided and press the Enter key to go to a specific page in the document.
- **Download** Download the current document and view it in its native viewer. Please note that this option can be hidden when setting up the Verification processing node in the Dispatcher Phoenix workflow.
- Rotate Rotate the current document 90° to the right. Selecting this option multiple times will continue rotating 90° each time. The orientation is applied to all documents in the batch. Orientation is only for the document preview; documents return to their original orientation after the batch has been released.
- Zoom 100% Magnify the view of the current document to 100%.
- Fit to Width Fit the width of the document in the Preview area.
- Fit Whole Page Fit the entire page of the document in the Preview area.
- Magnifying glass Zoom in and out of the document in the Preview area. You can also move the Document Viewer to a new browser and drag-drop that browser to a secondary monitor, if necessary.
- Open in new browser Display Preview area in a new browser page which can then be dragged onto a second monitor for convenient display purposes.

Preferences

The Preferences pop-up, accessible from the Three Vertical Dots button on the tool bar, provides you with a list of tool bar and layout options that you can choose from to customize the look of the Verification page.

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After you select the various buttons that you want to appear and/or specific layout options, you can click on the **X** button to close the pop-up window or select the **RESET** buttons to revert the preferences back to their default settings.

Tool Bar Options

You can check the following boxes:

- Show First Doc Displays the FIRST DOC button on the tool bar.
- Show Previous Doc Displays the PREV DOC button on the tool bar.
- Show Next Doc Displays the NEXT DOC button on the tool bar.
- Show Last Doc Displays the LAST DOC button on the tool bar.
- ${\bf Show\ Reject}$ Displays the REJECT button on the tool bar.
- Show Save Displays the SAVE button on the tool bar.
- Show Save & More Displays the SAVE & MORE button on the tool bar.
- Show Release Displays the RELEASE button on the tool bar.
- Show Release All Displays the RELEASE ALL button on the tool bar.
- Show Delete Doc Displays the DELETE DOC button on the tool bar.
- Show Delete Batch Displays the DELETE BATCH button on the tool bar.
- Show App Name Displays the words "Verification" on the top, left-hand side of the page.

Layout Options

You can also customize the layout of the Verification page by checking the following boxes:

- Hide Workflows/Batches- Remove the list of batches/workflows from the left hand side of the Verification page.
- **Hide status bar** Remove the status bar from the bottom of the Verification page. This status bar displays the name of the workflow, the name of the selected batch, the document and page that you are currently viewing, as well as the document name and file size.
- Compact toolbar Shrink the appearance of the toolbar.
- Persist Doc Viewer Width Any changes to the width of the Document Viewer will be saved and will remain the next time batches are selected in the Verification app.

Keyboard Shortcuts

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Show / Hide Shortcuts

- Show / Hide Help: ? or CTRL + `
- Show / Hide Toolbar and Batch Panel: CTRL + 7
- Show / Hide About Screen: CTRL + i
- Show / Hide Preferences Screen: CTRL + o
- Close Keyboard Shortcut dialog: ESC

Navigation Shortcuts

- Go to First Page: CTRL + ↑
- Go to Previous Page: CTRL + \leftarrow
- Go to Next Page: CTRL + \rightarrow
- Go to Last Page: CTRL + \downarrow
- Go to First Document: CTRL + M
- Go to Previous Document: CTRL + ,
- Go to Next Document: CTRL + .
- Go to a Specific Document in the Batch: CTRL + G
- Go to the Last Document: CTRL + /

Verification Shortcuts

- Toggle Lock/Unlock Batch: CTRL + L
- Reject Document: CTRL + Delete
- Save Current Document: CTRL + S
- Save and Move to Next Document: CTRL + Enter
- Save and Move to Next Unsaved Document: CTRL + ↑ + Enter
- Save and Release Document: CTRL + 9
- Release all Saved Documents: F9

Document Preview Shortcuts

- **Zoom in by 100%:** CTRL + 1
- Resize to Fit Width of Page: CTRL + 2
- Resize to Fit Whole Page: CTRL + 3
- Zoom out: CTRL + 4
- **Zoom in:** CTRL + 5

Document Viewer Shortcuts

• Toggle Document Viewer: F8

Customize Layout Shortcuts

- Toggle Batch/Workflow Panel: F4
- Reset Layout: CTRL + 0

Workstation

Overview of Workstation

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Dispatcher Phoenix Workstation is a dedicated scan station that supports any manufacturer's high-speed TWAIN scanning devices. Workstation features the following:

- · Real-time image display
- Auto separation
- Scanned image manipulation including:
 - o drag-and-drop image reordering
 - split
 - merge
 - o point-and-click rescan
 - more
- · Many other features

Dispatcher Phoenix Workstation provides a comprehensive batch scanning solution that is completely integrated with the Dispatcher Phoenix application. Once batches have been received and manually manipulated within the Workstation, an automated Dispatcher Phoenix workflow can process them further and/or store them in the appropriate document management system.

Notes:

- Konica Minolta HDD TWAIN driver is not supported.
- Konica Minolta TWAIN driver is partly supported. It is possible to scan the document, however, the driver UI setting will not be available.
- A high speed desktop scanner is recommended, such as Fujitsu 7160.

Workstation Quick Start

Below is a list with links to the major topics in the Workstation section of the Help. For information on installing Workstation, click here.

- Step 1: Create and run a Workflow Create and run a Dispatcher Phoenix workflow that includes the Workstation input node.
- Step 2: Configure the Workstation Configure the Workstation to communicate with the Dispatcher Phoenix server.
- Step 3: Create a new batch Select an existing batch or choose to create a new batch to scan into.
- Step 4: Choose the source for images Choose how you are going to import images into the Workstation (MFP, scanner, folder, files, etc.)
- Step 5: Import files Import files into the Workstation.
- Step 6: Manipulate scanned images Manipulate your scanned images and documents in the Workstation (reorder, split, merge, etc.)
- Step 7: Submit the batch Submit the batch to Dispatcher Phoenix.

Workstation Workflows

The workflow for batch scanning typically follows this process:

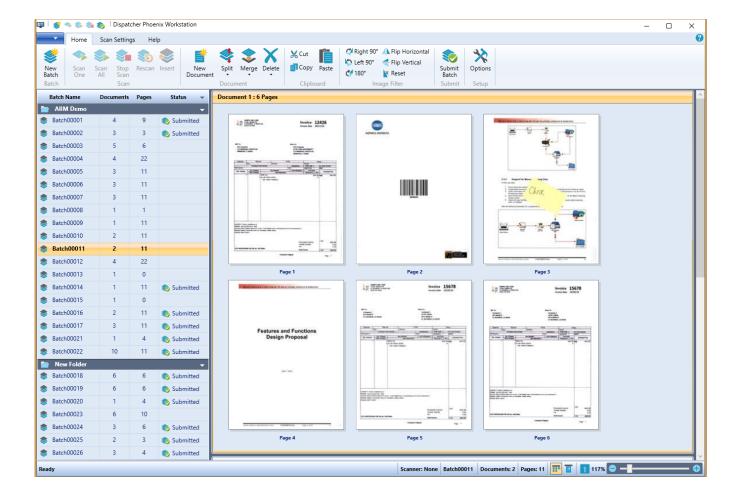
- 1. **Document preparation** A scan operator prepares the documents for the batch scanning process.
- 2. Scanning Batches are placed in the scanner or MFP's Automatic Data Feeder for scanning.
- 3. Quality Assurance Batches are reviewed for quality. Pages/documents are manipulated and rescanned, etc. if necessary.
- 4. **Indexing or Classification** Once passing Quality Assurance, index information can be associated with the documents in the batch either automatically via zonal OCR/database look-ups or via manual input. The use of shortcut keys speeds the manual indexing process.
- 5. **Migration to the document management solution** Once reviewed and indexed, the batch can be stored in a document management system for future retrieval.

The main Dispatcher Phoenix Workstation interface consists of the following areas:

- Batch List Area
- · Image Preview Area
- Tool Bar for scan and batch settings.

The following illustration shows the main interface:

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Batch List Area

The left side of the Workstation displays all batches, organized in folders. Within each folder, you will see:

- The name of the batch(es) within the folder.
- The number of documents in each batch.
- The number of pages in the batch.
- The status of the batch (whether it has been submitted to a workflow yet).

Batch List Menu

The arrow button at the top of the Batch List area allows you to bring up another menu with the following options:

- New Folder Creates a new folder to organize batches in. You can choose whether to insert the folder at the top or bottom of the Batch List area.
- Expand All Displays the contents of each folder.
- Collapse All Hides the contents of each folder.

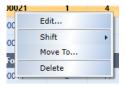
Managing Batches

You can right-click on a Batch name to access a context menu with the following options:

- Edit... Edit batch settings in the Update Batch window (which is similar in functionality to the Create New Batch window).
- Shift Move the batch within the folder. Options are: Top, Up, Down, or Bottom.
- Move To... Move the batch to another folder. The Select a Folder window will appear, allowing you to select the folder that you want to move the batch into.

• **Delete option** - Delete the batch.

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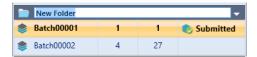


You can also rearrange batches within folders by drag-dropping batches from one folder to another.

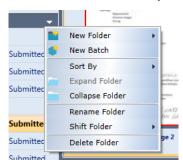
Managing Folders

A folder's down arrow provides access to the following menu options:

- New Folder Creates a new folder (positioned above or below the folder in the Batch List).
- New Batch Creates a new batch to scan into.
- Sort By Sorts the batches in the folder by either name or status.
- Expand Folder Displays all batches in the folder.
- Collapse Folder Hides all batches in the folder.
- Rename Folder Allows users to enter a new name for the folder in the Folder bar. Once this option is selected, you will be able to type a new name directly into the field next to the folder icon in the Batch List area, as in the following illustration:



- Shift Folder Moves the folder to the top or bottom of the Batch List area or move the folder down or up.
- Delete Folder Permanently deletes the folder and all the batches contained within the folder.



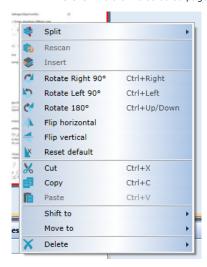
Preview Area

The Preview area displays thumbnail image views of all pages/documents in the selected batch and provides the following features/capabilities:

- **Reordering** Thumbnail images can be dragged-dropped to reorder pages or reposition them from one document to another. In addition, documents can be dragged-dropped to reorder them.
- **Zoom** Double-click on the thumbnail image to zoom in.
- Context Menu Right click on a thumbnail image to choose from the following options:
 - Split:
 - Selected pages Move all selected pages into a new document.
 - From here to end Move all pages starting from the selected page to the last page in the document into a new document.
 - From beginning to here Move all pages from the beginning of the document to the selected page into a new document.
 - Each single page Move each page in the document into its own separate document.
 - Rescan Scan and replace the selected page with a rescanned image.
 - Insert Scan and insert a new image before the selected page.
 - Rotate Right 90° Rotate the selected page 90 degrees to the right.
 - Rotate Left 90° Rotate the selected page 90 degrees to the left.

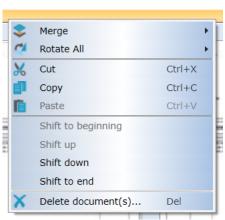
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- Rotate 180° Rotate the selected page 180 degrees.
- Flip horizontal Flip the selected page horizontally.
- Flip vertical Flip the selected page vertically.
- Reset default Reset the selected page to its original setting.
- **Cut** Cut the selected page to the clipboard.
- Copy Copy the selected page to the clipboard.
- Paste Paste the page from the clipboard.
- · Shift to Reposition the selected page to the beginning or end of the document or to the right or left.
- Move to Move the selected page to a specific folder.
- **Delete** Delete the selected page from the document and batch.



Document title bar - Right-clicking on a document's title bar brings up a context menu with the following options:

- Merge Merge either Selected documents or All Documents.
- Rotate All Rotate all documents
- Cut Move document(s) to the clipboard.
- Copy Copy document(s) to the clipboard.
- Paste Paste document(s) from the clipboard.
- Shift to beginning Move selected document to the beginning of the batch.
- Shift up Move selected document up.
- Shift down Move selected document down.
- Shift to end Move selected document to the end of the batch.
- Delete document(s) Delete the selected document(s).



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Additional Controls



At the bottom of the Dispatcher Phoenix Workstation window, there are additional controls/displays that show:

- The status of the Dispatcher Phoenix Workstation (Ready, Processing Pages, Select Scanner Source, or Scanning).
- · The scanner source selected.
- The name of the selected batch.
- The number of documents in the selected batch.
- The number of pages in the documents.
- · An option to toggle between thumbnail and full page view of the selected document.
- · Zoom controls to zoom into focus or select the 1 icon to revert back to 100% view.

Tool Bars

The tool bars provide you with access to scanner settings and other Workstation operations.

Home Tool Bar

The Home Tool Bar is displayed when you first launch the Workstation with the following options:



- New Batch Create a new batch.
- Scan One Scan one page into the selected document in the batch. If the batch is set up to separate documents based on a specific page count, the scanned image may be automatically added to a new document.
- Scan All Scan all pages into the selected document in the batch.
- Stop Scan Stop the scan import process.
- Rescan Start the scan process to replace the selected page with a rescanned image.
- Insert Start the scan process to insert an image before the selected page.
- New Document Create a new document to scan into.
- Split Choose to split:
 - Selected pages in the document.
 - Starting from the selected page to the end of the document.
 - Starting from the first page to the selected page.
 - The document by each page.
- Merge Choose to merge:
 - Selected documents.
 - The selected document with the previous document.
 - The selected document with the next document.
 - The selected document with all documents to the end of the batch.
 - Documents from the beginning of the batch up to the selected document.
 - · All documents.
- Delete Choose to delete:
 - Selected pages in the document.
 - $\circ\;$ Pages starting from the selected page to the end of the document.

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- · Pages starting from the beginning of the document to the selected page.
- · Selected documents.
- · All documents.
- Cut Cut the selected page(s) to the clipboard.
- Copy Copy the selected page(s) to the clipboard.
- Paste Paste the page(s) from the clipboard.
- Rotate Right 90° Rotate the selected page 90 degrees to the right.
- Rotate Left 90° Rotate the selected page 90 degrees to the left.
- Rotate 180° Rotate the selected page 180 degrees.
- Flip horizontal Flip the selected page horizontally.
- Flip vertical Flip the selected page vertically.
- Reset Revert the selected page back to its original position/appearance.
- Submit Batch Submit a batch to a Dispatcher Phoenix workflow.
- Options Configure the Workstation to communicate with the Dispatcher Phoenix client application and specify other settings.

Scan Settings Tool Bar

Use the Scan Settings Tool Bar to specify the source for your document import as well as settings for your scanner.

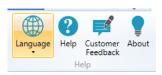


- Select Choose an import source for your scanned images. The Select Source window opens, which displays all connected scanners detected and also allows you to select a folder to import images from or select to import images one by one.
- Full Color Scan images in color.
- Black and White Scan images in black and white.
- Grayscale Scan images in grayscale.
- Flatbed Glass Scan images from the glass of a flatbed scanner.
- ADF Scan images from the Automatic Document Feeder of the scanner and/or MFP.
- 1-Sided Scan images in one sided.
- 2-Sided Scan images in double sided.
- None No rotations are applied to the documents being scanned into the Workstation.
- Right 90° Rotate documents being scanned into the Workstation 90 degrees to the right.
- Left 90° Rotate documents being scanned into the Workstation 90 degrees to the left.
- 180° Rotate documents being scanned into the Workstation 180 degrees.
- Flip Horizontal Horizontally flip scanned images being imported into the Workstation.
- Flip Vertical Vertically flip scanned images being imported into the Workstation.
- Size Select the size of the paper documents being scanned into the Workstation.
- Feeder Direction icons Select the direction of the documents (Long Edge / Portrait or Short Edge / Landscape).
- Deskew Automatically deskew documents being imported into the Workstation.
- Auto Rotate Automatically rotate documents being imported into the Workstation.
- Save Save the scan settings for future batches.
- Reset Revert the scan settings back to their original default settings.
- Driver Settings Access/specify additional scan settings for your scanner.

Help Tool Bar

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The Help Tool Bar provides buttons for switching the language that the Workstation is displayed in, accessing Help information, and viewing version information.



- Language Select a language to display the Workstation in.
- Help Access online help about the Workstation.
- Customer Feedback Launch the Customer Feedback Agent to submit comments about the application.
- · About View version information and copyright information.

Quick Access Tool Bar



The Quick Access tool bar contains a set of commands that always appear, regardless of the tab that is currently selected.

- Dispatcher Phoenix Workstation button Restore, move, size, minimize, maximize or close the Dispatcher Phoenix Workstation.
- New Batch Create a new batch using the Create New Batch window.
- Scan One Scan a single page into Dispatcher Phoenix Workstation.
- Scan All Scan all pages into Dispatcher Phoenix Workstation.
- Stop Scan Stop the scanning process before all pages are scanned.
- **Submit Batch** Submit the batch to Dispatcher Phoenix for further processing. If a workflow has not already been associated with the batch, you will need to choose which workflow to submit the batch to.

Workstation Metadata

The following scan data can be output as metadata from the Workstation:

- workstation:address The URL of the Dispatcher Phoenix bEST Server.
- workstation:batch.documents The total number of documents in the batch.
- workstation:batch.group The name of the Workstation folder that the batch is included in.
- workstation:batch.name The name of the batch.
- workstation:batch.pages The total number of pages within the batch.
- workstation:document.id The number associated with the document within the batch.
- workstation:document.name The name of the document within the batch (naming conventions are defined in the Naming Format field in the Workstation Input node or the Workstation's Create New/Update Batch window).
- workstation:document.pages The total number of pages in the document.
- workstation:document.size The size of the document (in bytes).
- workstation:id The unique identifier of the Workstation.
- workstation:name The name of the PC that the Dispatcher Phoenix Workstation is running on.
- workstation:user The name of the currently logged in Windows user or other Windows user specified in the Options window of the Workstation.

Scanner Metadata

When using a scanner as an Import Source, the following metadata is produced:

- workstation:scan.output The output of the scan (either Color, Black/White, Grayscale)
- workstation:scan.papersize The size of the paper being scanned.
- workstation:scan.resolution The resolution used when scanning into Dispatcher Phoenix Workstation.
- workstation:scan.source The name of the scanner used to import images into Dispatcher Phoenix Workstation.
- workstation:scan.type The scan type (Simplex or Duplex).

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Batch Level Fields Metadata

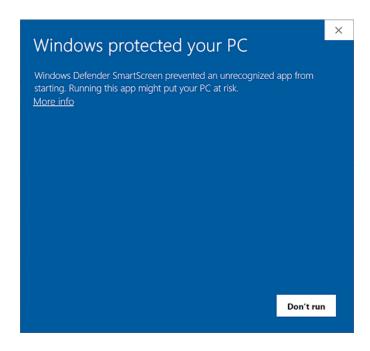
Batch level fields metadata will follow this format:

{workstation:batch.fields.variable name}

Workstation Installation and Requirements

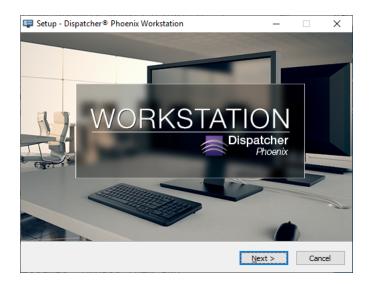
To download and install Dispatcher Phoenix Workstation for use in Dispatch Phoenix workflows, do the following:

- 1. Access the **SEC Website** and log in. To download products, you must be logged in. The SEC website provides information on downloading and registering your products.
- 2. From the Menu bar, click on **Products**. The Product Catalog page appears.
- 3. Scroll down the page and find Dispatcher Phoenix Workstation. Click on the Download link.
- 4. When the download completes, click on the **Dispatcher-Phoenix-Workstation-Setup.exe** file and follow the instructions to install Dispatcher Phoenix Workstation.
- 5. If you encounter any warning messages, bypass them and continue the installation. If the following warning message appears, click on **More info** and, in the screen that appears, click **Run anyway**.

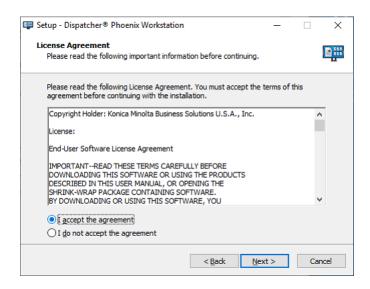


6. Click Next to continue.

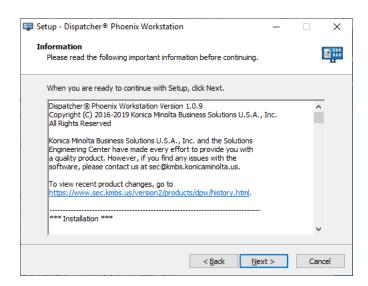
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7. Accept the license agreement and click on **Next**.

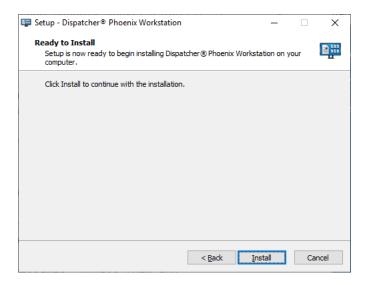


8. In the **Information** panel, read the information and then click **Next**.

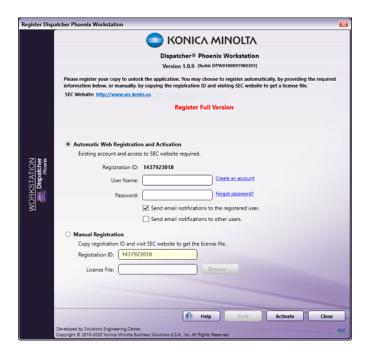


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9. When you are ready to proceed with the installation, click the **Install** button.



10. Finally, register Workstation.



The SEC Website has information on registering Dispatcher Phoenix products.

11. When the installation is complete, the Add In Manager displays a completion message. Click the Close button to exit the installation.

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Requirements for Workstation

To use the Dispatcher Phoenix Workstation, the following is required:

- The Workstation must be on the same domain as the Dispatcher Phoenix server.
- A Dispatcher Phoenix Workflow with a **Workstation Input node** must be running. The **Workstation Input node** accepts all scanned jobs from the Workstation.
- The Dispatcher Phoenix application must be open or the workflow should be running as a service.
- The appropriate TWAIN drivers must be installed on the Workstation's system.

Create a Workstation Workflow

In order to use the Workstation, one or more workflows that include the Workstation node must be running first.

Workstation Node

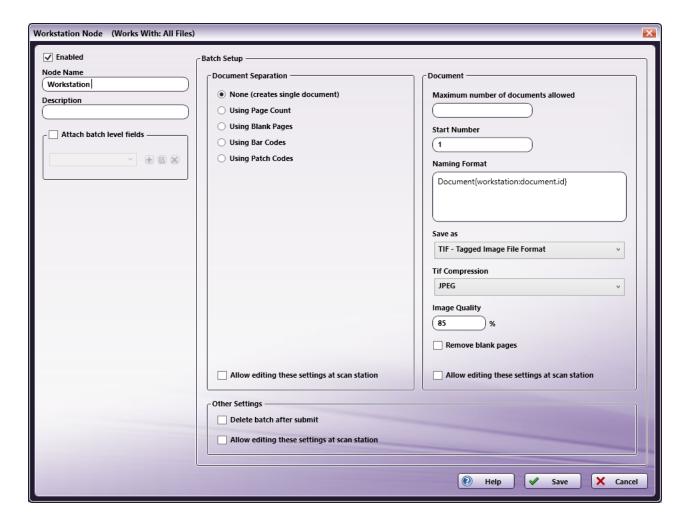
The Workstation node collects files that have been submitted from the Dispatcher Phoenix Workstation. To configure the Workstation input node, do the following:

- 1. Create a new workflow within the Dispatcher Phoenix application.
- 2. Drag-drop a Workstation input node onto the Workflow Builder Tool's work area.
- 3. Double-click on the Workstation icon to open up its node properties window. The Workstation icon resembles the following illustration:



4. The Workstation Node properties window appears, as in the following illustration:

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- 5. All Dispatcher Phoenix nodes have the following common controls:
- Enabled box Make sure this box is checked so that the node will run.
- Node Name field Use this field to enter a meaningful name for the Workstation node.
- **Description** field Use this field to enter a description for the Workstation node. This is not required, but can be helpful with multiple input nodes. If the description is long, you can hover the mouse over the field to read its entire contents.
- 5. On this window, you should configure your batch setup, document naming conventions, batch level fields (if necessary), and other settings. See the sections below for more information.
- 6. When you are done configuring the node, select the **Save** button to keep your Workstation settings. You can also select the **Help** button to access help and select the **Cancel** button to exit the window without saving any changes.

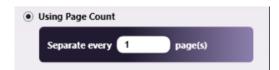
Document Separation

You can specify how you would like the batch to be automatically separated when imported into the Workstation. These settings can also be configured in the Workstation. If you want to be able to modify this setting from the Workstation, you must check the **Allow editing these settings** at scan station box.

Dispatcher Phoenix provides several options for separating documents within a batch once they are imported into the Workstation, as follows:

- None Do not split the batch into individual documents. All scanned pages will be added to ONE document when imported/scanned into the Workstation.
- **Using Page Count** Split the batch into separate documents based on a fixed page count. If you select this radio button, a field will appear below, allowing you to specify a value. See the following illustration for an example:

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• Using Blank Pages – Split the batch into separate documents based on the detection of a blank page. If you select this radio button, a **Content Sensitivity** slide bar will appear below, allowing you to adjust the threshold used to determine if the page is considered blank or not (e.g., if you will allow for small marks or other "noises" on the blank page, etc.). See the following illustration for an example:



- Using Bar Codes Split the batch into separate documents based on a detected barcode. Supported barcodes detected are: Aztec; Codabar;
 Code 128; Code 39; Code 93; Data Matrix; EAN 8; EAN 13; Interleaved 2 of 5; Maxi Code; QR Code; UPCA; UPCE; and PDF 417. If
 you select this radio button, additional fields will appear below allowing you to do the following:
 - Choose a barcode type using the **Barcode** drop-down list.
 - Specify a conditional rule for the barcode using the **Condition** drop-down list, such as "Is," "Contains," "Exists," "When Value Changes," and "Regular Expression."
 - Enter a value for the barcode rule using the Value field.
 - · Check the Match Case box to match the exact case entered in the Value field.
 - Check the **Delete Separator Page** box to delete the barcode separator page as part of the document separation process.

See the following illustration for an example:



• Using Patch Codes - Split the batch into separate documents based on detected patch codes.

Note: This feature is currently only available with scanners. If you select this radio button, additional fields will appear allowing you to do the following:

- Choose a patch code to be detected using the **Patch Code** drop-down list.
- Check the **Delete Separator Page** box to delete the patch code separator page as part of the document separation process.

See the following illustration for an example:



• If you want to be able to modify these setting at the Dispatcher Phoenix Workstation, check the **Allow editing these settings at scan station**

Document Settings

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The Document Settings area provides options for how documents should be named and saved within the Workstation. The following settings are available:

- Maximum number of documents allowed Enter the maximum number of documents allowed to be included in the batch.
- Start Number Enter a start number (between 1 and 1,000,000,000) for the first document in the batch. By default, the first document number in a batch is 1. Once the first document is created in a batch, any subsequent new document is assigned a number directly following the previous document number.
- Naming Format Choose how you would like the documents within the batch named. The default is to include the word "Document" along with their document number (e.g., Document1, Document2, Document3, etc.), which is created using workstation metadata ({workstation:document.id}).
- Save as Choose the format for the documents (TIF or PDF). If you choose TIF, you can also choose the type of TIF compression to be used using the **Tif Compression** drop-down list. Options are:
- LZW
- JPEG
- CCITT Fax3
- CCITT Fax4
- Image Quality Control the quality of the image. The higher the Image Quality setting, the more detail is preserved in the optimized image, but the larger the file size.
- Remove blank pages Remove any blank pages found during the batch import process.
- Allow editing these settings at scan station Modify these settings in the Dispatcher Phoenix Workstation.

Other Settings

- Delete batch after submit Automatically delete batch once it has been submitted from the Workstation.
- Allow editing these settings at scan station Modify this setting in the Dispatcher Phoenix Workstation.

Other Nodes

The Workstation Input node is commonly used with the **Batch Indexing** and/or **Verification** nodes to route files for batch indexing and/or verification on Dispatcher Phoenix Web.

Batch Level Fields

If you need to associate additional metadata to all the documents in the batch, you can create batch level fields that must be filled out when the batch is submitted from the Workstation. These batch level fields must be part of an Index Form that is attached to the Workstation node. The only way to create this special Index Form is from within the Workstation node.

To create an Index Form with batch level fields, do the following:

- 1. Make sure you are in the Workstation node.
- 2. Check the Attach batch level fields box.
- 3. Select the + button; then choose to create a Blank Index Form.
- 4. Drag-drop **text fields / drop-down lists** to build your Index Form.

Configure the Workstation

The Dispatcher Phoenix Workstation must be configured to communicate with the Dispatcher Phoenix server, using the Options window on the Workstation.

Options Window

The Options window provides you with the ability to specify settings about the server, as well as general Workstation settings. To access the Options window, do the following:

- 1. Launch the Dispatcher Phoenix Workstation.
- 2. From the Home tab's tool bar, select the Options button. The Options window will appear, as in the following illustration:

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3. Select the **Save** button when you are done.

Server Settings

The Options window provides the following server settings that should be configured:

- Host Name / IP Address Enter the Dispatcher Phoenix server's host name or IP address.
- Login As Choose how to log into the Dispatcher Phoenix Workstation. Options are: Current Logged-in Windows User or Other Windows
 User.

General Settings

The Options window provides the following general settings that can be configured:

• **Disable Animations** - Disable Workstation page animations during import and transitions.

Create A New Batch

To begin importing your documents into the Workstation, you can create a new batch or select an existing batch from the Batch List area to scan into.

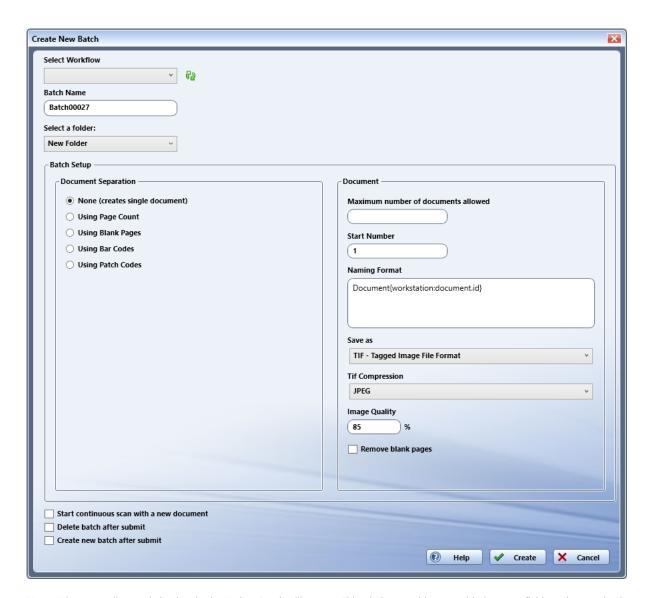
Important!

- Before creating a batch, a workflow that includes a Workstation node must be running first.
- The Hostname / IP Address that the Workstation is connecting to (specified on the Options window) must be correct.

New Batch Window

To create a new batch, select the **New Batch** button from the **Home** tab's tool bar. The Create New Batch window will appear, as in the following illustration:

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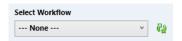


Note: When you edit an existing batch, the Update Batch will appear. This window provides you with the same fields/options as the Create New Batch window.

The sections below describe the different options available for you to configure when setting up a new batch. When you are done configuring the new batch, select the **Create** button.

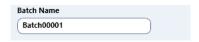
Select Workflow

You can choose to associate the batch with a Dispatcher Phoenix workflow when creating the batch. The **Select Workflow** drop-down list displays all currently running **Dispatcher Phoenix Workstation** workflows. You can refresh the workflow list by clicking on the **Refresh** icon next to the drop-down list. Once you select a workflow, documents in your batch will be sent to that workflow once the batch is submitted.



Batch Name

By default, the first batch is named "Batch00001" with subsequent batches sequentially numbered. You can change the name of the batch, if necessary. If you do not need subsequent batches to be automatically numbered, enter a batch name without numeric characters.



Select a Folder

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You can choose to organize your batches in folders. A folder called "New Folder" is the default folder that is created for you when you first start the Workstation. This drop-down list displays all existing folders that are currently available for you. You can also create a new folder by choosing the **Create New Folder** option. When creating a new folder, a **New Folder** entry field will appear, allowing you to enter a name for a new folder which will then be automatically created. See the following illustration for an example:



Batch Setup

If you did not select a workflow for this batch or if the selected workflow has editing enabled at the Workstation, you can specify document separation, naming, and format options for the batch. See **Create a workflow** for more information.

Continuous Scan

Dispatcher Phoenix provides you with flexible options when scanning into a batch. If you need to start a scan multiple times (based on the page limits of your Auto Document Feeder, etc. and would like all subsequent scans to be placed in a new document, check the **Start continuous scan with a new document** box.

If this box is left disabled, new scanned pages will be automatically added to the last document in the batch.

Delete Batch After Submission

By default, batches remain in the Dispatcher Phoenix Workstation after they have been submitted to a Dispatcher Phoenix workflow. However, you can choose to automatically delete the batch after it has been submitted by checking the **Delete batch after submit** box.

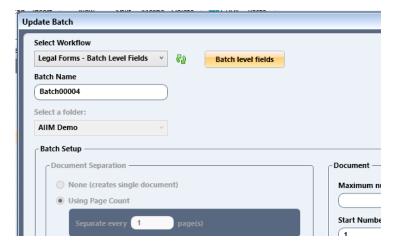
Create New Batch After Submission

By default, new batches are not created after a batch has been submitted to a Dispatcher Phoenix workflow. However, to speed up your scanning process, you may want to have a new batch created once a batch has been submitted. In this case, make sure that the **Create new batch after submit** box is checked.

The new batch that is automatically created will appear below the submitted batch in the Batch Folders area.

Enter Batch Level Indexing Information

To avoid having to enter batch level index information at time of submit, you can prepopulate the batch level fields with information when you create/edit the batch. This can be done in the Create Batch or Update Batch window, which will display a **Batch level fields** button, as in the following illustration:



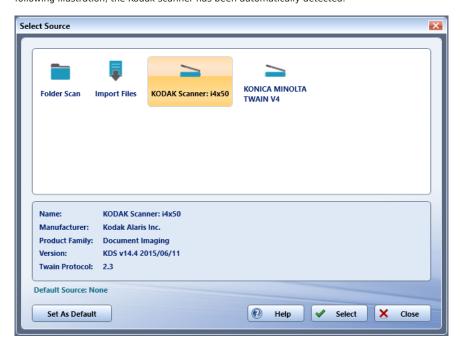
Choose Source For Importing Documents

The Dispatcher Phoenix Workstation supports submissions from TWAIN-based scanning devices, including MFPs, Desktop scanners, and high-speed production print devices. You can also import folders and images from your computer.

Select Source Window

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To choose a source for importing documents, click on the **Select** button from the Scan Setting's tool bar. The Select Source window appears. Any connected scanners or MFPs will be automatically detected by Dispatcher Phoenix Workstation and displayed in this window. For example, in the following illustration, the Kodak scanner has been automatically detected:



Once you are done selecting the source, click on the **Select** button.

Key Features

- The Select Source window provides the following options for import:
 - Folder Scan Import specific images from a folder.
 - Import Files Import specific images from your computer.
 - Scanner/MFP The connected scanner or MFP that has been detected.

Note: If you choose a scanner/MFP, you can also specify scan settings for the batch.

• Set As Default - The Set As Default button allows you to set the selected source as the default that will be used the next time you scan documents into a batch. Once a default has been specified, it will be listed as the Default Source and it can be easily reset by clicking on the Reset link. See the following illustration:



Import Documents

To start importing your documents into Dispatcher Phoenix Workstation, do one of the following:

1. Select the **Scan One** or **Scan All** button on the **Home** tab's tool bar.

OR

2. **Drag-drop images** from your computer onto a selected document in the Workstation's Image Display area. All images will be included in the same document.

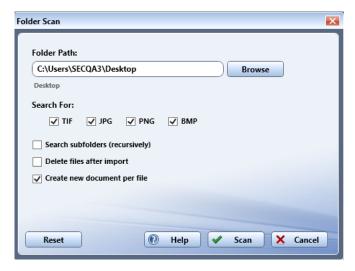
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Scanning from MFP

When scanning from the MFP, you may need to adjust the Workstation's scan settings to ensure that all pages are imported into the Workstation with the correct orientation. We recommend scanning one document (or page) first to see if you need to adjust the scan settings in the Workstation before scanning the entire batch.

Folder Scan

If you have chosen to import images from a folder on your computer, the Folder Scan window will appear once you start the scan, allowing you to choose the folder to use. See the following illustration:



To use this window, do the following:

- 1. Choose the folder that contains the document by selecting the Browse button.
- 2. Select the **Scan** button when you are ready to start the import process.

Note: After clicking the Scan button, the selected settings will be saved and available the next time the Workstation application is launched.

Folder Scan Import Options

The Folder Scan window provides the following options for the folder import:

- Search For Filter the file types that you want to import into Dispatcher Phoenix Workstation. Options are: TIF, JPG, PNG, and BMP.
- Search subfolders (recursively) Import images from any subfolders within the specified folder.
- Delete files after import Delete files after they are imported into Dispatcher Phoenix Workstation.
- Create new document per file Add each file into its own unique document within the Dispatcher Phoenix Workstation. If this box is disabled, all files will be imported into the same document.
- Reset Changes all options to the default settings, which are shown in the illustration above.

File Import

If you have chosen to import files from your computer, a Windows Explorer window will appear when you start the scan, allowing you to choose the image(s) that you want to import into Dispatcher Phoenix Workstation. The image(s) will be added to the selected document within your batch.

Working With Scanned Images

When pages have been scanned into a batch, they appear in the Workstation's Preview Area as thumbnail images (by default), separated into various documents based on the settings that you specify when first setting up the batch (either within the Workstation input node in the Dispatcher Phoenix workflow or within the Create New Batch window within the Workstation).

Reordering Images / Documents

Using this area, you can do the following:

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- · Double-click on a thumbnail image to view it full-sized.
- Drag-drop a page(s) to position it within the document. To select multiple pages, use the Ctrl key.
- Drag-drop a page(s) into another document to move it. To select multiple pages, use the Ctrl key.
- Select a page(s) and right-click to access its context menu for splitting, rotating, flipping, cutting, copying, pasting, shifting, moving, or deleting the page. See the Preview Area for more information on these options.
- Select a document's title bar and right-click to access the context menu where you can choose to merge, cut, copy, paste, shift, and delete documents. See the Preview Area for more information on these options.

Inserting Images

To insert mis-fed or forgotten documents without having to rescan the entire batch, do the following:

- 1. Select a page(s) in a document within the Image Display area.
- 2. Select the **Insert** button on the toolbar to begin the scan operation.
- 3. The selected file will replace the selected page(s).

Rescanning Images

To replace a page without having to rescan the entire batch, do the following:

- 1. Select a page(s) in a document within the Image Display area.
- 2. Select the **Rescan** button on the toolbar to begin the scan operation.
- 3. The selected image(s) will be inserted before the selected image in the Preview area.

Submitting A Batch

When you are ready to submit the batch to Dispatcher Phoenix for further processing, do the following:

- 1. Select the **Submit Batch** button on the tool bar.
- 2. If a workflow was not selected when you first created the batch, the **Select a workflow to submit the batch** window will appear, allowing you to choose a Dispatcher Phoenix workflow to submit the batch to.

Select a workflow

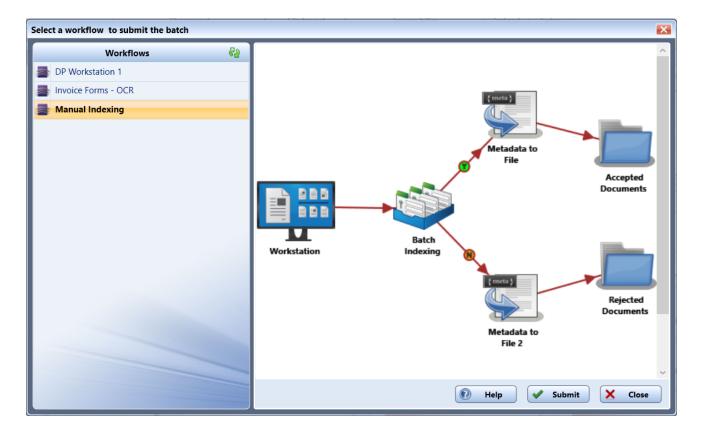
The **Select a workflow to submit the batch** window lists all currently running workflows that include the Workstation input node. To use this window, do the following:

1. To update the list, you can click on the **Refresh** button next to Workflows on the right hand side of the window. See the following illustration for an example:



2. From the Workflows panel, select the workflow that you are interested in. For quick identification purposes, the selected workflow will appear in the right-hand side of the window. See the following illustration for an example:

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3. Select the **Submit** button to submit the batch to the selected workflow.

Entering Batch Level Indexing Information

If the Workstation has batch level fields associated with it, a pop-up window will appear, prompting you to enter information about the batch, when the batch is submitted. See the following illustration for an example:

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Enterprise Options

Overview

To ensure maximum up-time for enterprise-level deployments, Dispatcher Phoenix offers important features for the enterprise, including:

- Failover A failover server that is used if the primary server goes down ensures maximum up-time. When a failure occurs on one server in a cluster, resources are redirected and the workflow is redistributed to another server in the cluster, which has been licensed as a failover server. All failover servers can function as a primary for 30 days, after which the failover acting as primary will stop functioning (if a licensed primary server is unavailable). If a primary server becomes permanently offline and the failover server needs to become the permanent primary server, a manual license transfer is necessary to move the primary license to the failover server.
- Load balancing For a large deployment of devices, load balancing is optimal for distributing requests to servers. With Dispatcher Phoenix, multiple primaries can be joined together for automatic load balancing in which case jobs move from one primary to another based on backload and a user-specified threshold.
- OCR offloading To speed processing time, intensive processing tasks can be offloaded to other servers. Dispatcher Phoenix can be set up to offload MFP Connectivity, Mobile Connectivity, Web Connectivity, and Workflow Processing.
- Workflow Sharing With the fine-grain sharing control feature, specific users or groups of users can be assigned workflows.
- Workflow Control Admins can run, stop, and pause workflows without needing Dispatcher Phoenix installed on your system.
- Dashboard Graphical online Dashboard provides quick snapshot on server/user activity.

These features are available via the Dispatcher Phoenix Web application.

Requirements

DP Web is supported on all HTML5 supported browsers, including:

- Chrome
- Firefox
- Internet Explorer 10+
- · Microsoft Edge

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Safari for Mac

Cluster Management

Using the Dispatcher Phoenix Web's "Manage Cluster" app, admins can set up server **clusters**, a group of servers working together as a single system to ensure high availability of services.

Important! Only administrators have access to Manage Cluster capabilities.

Each Dispatcher Phoenix server in a cluster can have a different role:

- · Node A primary Dispatcher Phoenix server that runs all "Started" workflows.
- **Primary** A fully licensed Dispatcher Phoenix server. (Please note that Dispatcher Phoenix servers licensed as "Demo" cannot be a primary server).
- Failover A Dispatcher Phoenix server that is licensed as a Failover. When the primary server goes down, the Failover server processes all "Started" workflows. Failover servers ONLY run workflows when the primary server goes down. When setting up a cluster for Failover, all workflows on the primary should be running as a service. When a Failover server is acting as the primary, running workflows can only be stopped or modified by users who log into the Failover server with the same credentials as the primary server.

Note: To ensure that failover is automatic for MFPs, the administrator should have the MFPs registered with a hostname that is either controlled by a proxy with failover (e.g., HAProxy, nginx, etc.) or governed by a DNS server with failover policies.

• Offload - A Dispatcher Phoenix server that is licensed to operate as an offload server. You can add Workflow Processing (Advanced and Basic)
Offload servers to the cluster.

Configuration Requirements

- If setting up your cluster with multiple primaries, the packages of Dispatcher Phoenix on the primary servers must match. For example, your primary cluster can include 2 servers with licenses of Dispatcher Phoenix Office installed on both of them; however, your cluster cannot include 1 server with Dispatcher Phoenix Office and 1 server with Dispatcher Phoenix Finance.
- All servers in the cluster must have the same driver(s) installed. You can use the Dispatcher Phoenix client application (under Tools > Options > Database Setup) to control the driver/version. For example, if SQL Server Native Client 11.0 is configured in the Dispatcher Phoenix client, SQL Server Native Client 11.0 must be installed on the other servers in the cluster.

Quick Start

To set up your cluster, you must do the following:

- 1. Configure each system in the cluster to broadcast to the cluster, using the Workflow Services Manager.
- 2. Access the **Cluster Management** app within Dispatcher Phoenix Web.
- 3. Add a server to the cluster.

Broadcast Set Up

All members of the cluster must be able to communicate with one another. By default, Dispatcher Phoenix servers are set up as "private." You must use the **Workflow Services Manager** to enable your servers to be public so that they are accessible for cluster set up.

Do the following:

1. Launch the Workflow Services Manager (Start Program > Workflow Services Manager). See the following illustration for an example:

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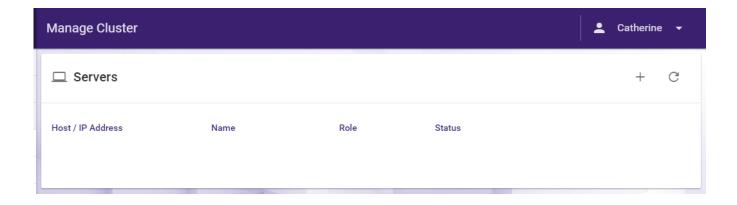


- 2. In the Workflow Services Manager window, do the following:
 - 1. Select the Workflow Service tab.
 - 2. Select the **Stop Service** button to stop Workflow Services first.
 - 3. Choose which servers should be made public by doing one of the following:
 - Choose the User Specified IP/Hostname option from the Broadcast to Cluster drop-down list; then enter the specific server's IP address in the empty field that is provided.
 - Choose the Local IP address that Dispatcher Phoenix has automatically detected and is listed in the Broadcast to Cluster dropdown list
 - Choose **Cluster (automatic)** from the **Broadcast to Cluster** drop-down list to allow Dispatcher Phoenix to automatically detect the computer's host name (i.e., this option is applicable if your computer is part of a domain, etc.)
- 3. Select the Save Settings button when you are done.
- 4. Select the **Start Service** button.
- 5. Select the ${f Close}$ button to close the Workflow Services Manager.

Access the Manage Cluster App

From the primary system's Dispatcher Phoenix Web, select the **Manage Cluster** button or the **Tools > Manage Cluster** option from the slide out menu. The Manage Clusters page will display with the host/IP address of the Dispatcher Phoenix server running locally, along with a friendly name and its status (online or offline).

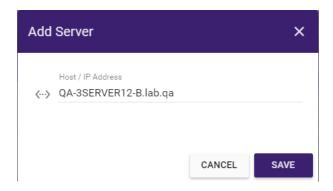
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Add A Server

To add a new server within the **DP Web Manage Cluster** app, do the following:

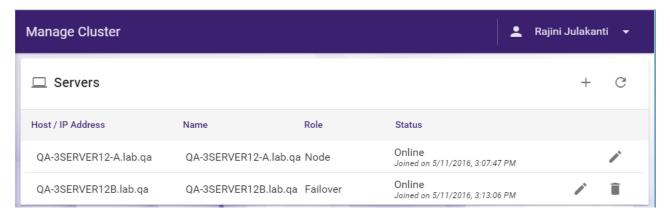
- 1. Select the Add Server (+) button.
- 2. On the Add Server pop-up window, enter information about the server in the provided field; then select the **Save** button. See the following illustration:



You must add a server in the same way that it was broadcasted to the cluster. For example:

- If the server was broadcast with an IP address, the server must be added using that IP address.
- If the server was broadcast with hostname, the server must be added using that hostname.
- If the server was broadcast automatically, the server must be added using that computer's fully qualified domain name.

The new server will appear in the Servers list with its licensed role listed (Failover, Offload, etc.). See the following illustration:



Edit A Server

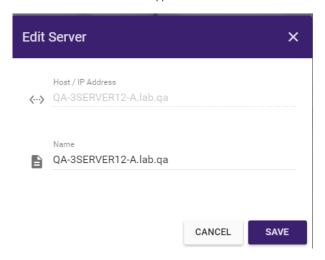
To edit an existing server's friendly name, do the following:

1. Select the server's Edit Server button.

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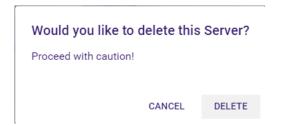
2. On the Edit Server pop-up window, type in a new friendly name; then select the **Save** button.

The modified server name will appear in the Servers list. See the following illustration:



Delete A Server

To remove a server, select the **Delete server** icon; then select the **Delete** button on the following confirmation message:



Applying Updates in Clustered Environments

When applying updates to a primary and failover server in a cluster, follow these guidelines:

- 1. Apply updates to the primary server. This will turn the server off. The following will occur:
- After updates complete and the server powers up again, it will act as a Failover.
- The server that was licensed as Failover will now act as the primary.
- 2. Apply updates to the failover server. This will turn the server off. The following will occur:
- The server that was originally licensed as a primary will now act as the primary again.
- After updates complete and the server powers up again, it will act as a Failover again.

Configuring Offload Servers

To install and configure a Dispatcher Phoenix Offload Server, do the following:

Step 1: Purchase Offload License

To begin, you should order the appropriate Offload license (with maintenance). Dispatcher Phoenix offers the following licenses for offloading:

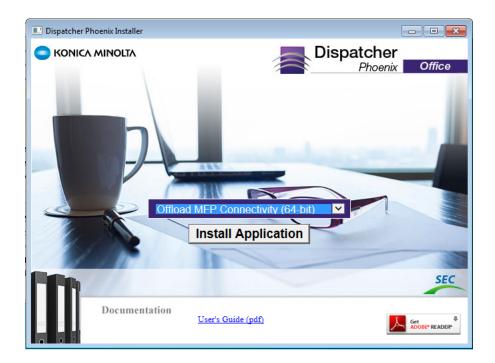
- MFP Connectivity
- · Web Connectivity
- Mobile Connectivity
- Workflow Processing (Basic and Advanced)

Step 2: Install Offload License

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Once a license has been purchased and you have received a Purchase Code, you can install the Offload license on the server that you have designated for that purpose. Follow these steps:

- 1. Launch the Dispatcher Phoenix Installer.
- 2. Choose the appropriate license from the drop-down list; then select the **Install Application** button. See the following illustration:



- 3. Select the Yes button on the User Account Control pop-up window that appears.
- 4. Select the **Next** button on the window that appears. See the following illustration for an example:



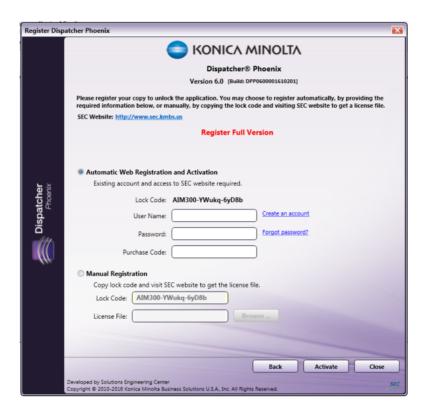
- 5. Select the I accept the agreement radio button on the License Agreement window; then select the Next button.
- 6. Review the Readme text file; then select the **Next** button.
- 7. On the Select Additional Tasks window, customize the set up; then select the **Next** button.
- 8. Select the **Install** button on the Ready to Install window to begin the installation process.
- 9. Once the Dispatcher Phoenix Registration window appears, select the **Next** button. See the following illustration for an example:

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- 10. On the Register Dispatcher Phoenix window, do the following:
 - Enter your SEC account credentials in the User Name and Password fields.
 - Paste your Purchase Code in the **Purchase Code** field.
 - Select the **Activate** button.

See the following illustration for an example:

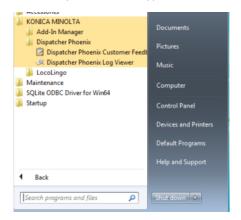


11. On the Congratulations message that appears, select the **OK** button. Add In Manager will continue with the installation process.

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12. Select the **Close** button when the installation process is complete.

Only the packages required for the license are installed, along with the Dispatcher Phoenix Log Viewer and Customer Feedback Agent. Please note that the Dispatcher Phoenix application will NOT be installed.

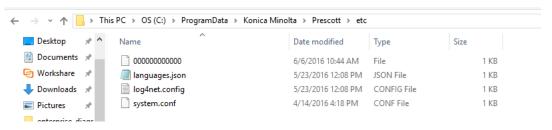


Step 3: Configure Offload Server

Configure MFP Connectivity Server

To configure your MFP Connectivity Offload Server, you must edit a configuration file. Please do the following:

1. Go to the c:\ProgramData\Konica Minolta\Prescott\etc\ directory. See the following illustration:



- 2. Open the system.conf file.
- 3. Change the host "127.0.0.1" default setting to the IP/Host name of the server running Dispatcher Phoenix. See illustration below:

```
{
   "xmpp_server": {
      "host":"127.0.0.1",
      "port":5222,
      "ssl":false,
   }
}
```

4. Save the file.

Optional Step (Recommended)

For optimal performance, we recommend installing the bEST Server in IIS. Before you get started, make sure the bEST Server is stopped. For proper logging to take place, IIS and the bEST server cannot be running at the same time. Do the following:

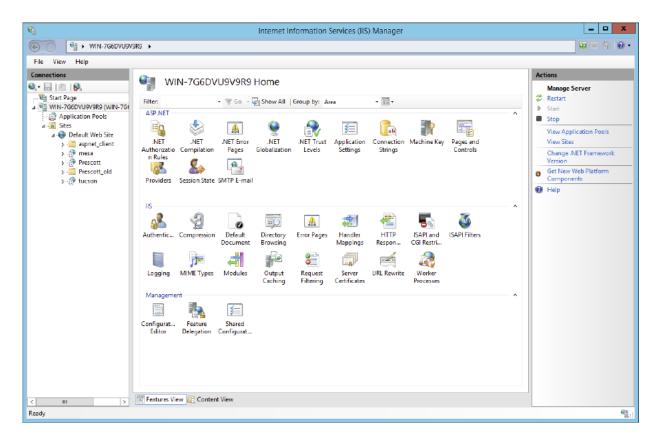
- 1. Go to Local Services and do the following:
- 2. Stop the KMBS bEST server.
- 3. Change the Startup type to "Disabled."

Basic Set Up

- 1. Install IIS. Make sure that:
 - IIS+ dependencies for .net are installed. This varies based on Windows version but, in general, is available via the 'Turn Windows features on or off' in the Windows Control Panel.

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- · IIS is enabled.
- · IIS Management Console is enabled
- 2. Once IIS is installed, configure the system. Follow these steps:
 - Launch the Internet Information Services (IIS) Manager from the Windows Start menu. See the following illustration for an example:



- Click on the current server and sites underneath it to **expand** the list.
- Right-click on Default Web Site; then choose the Add Application... option from the menu that appears.
- On the Add Application window, do the following:
- In the Alias field, enter Prescott.
- In the **Physical Path** field, browse to and select C:\Program Files\Konica Minolta\Prescott\
- 3. Ensure that IIS rewrites OpenAPI traffic to the application running in IIS. Due to the design of the MFP, all OpenAPI requests are set to the path of /OpenAPI of the server that the MFP is communicating with. In order to support this, it is required that IIS rewrite traffic destined to that end point on the server to the actual application running in IIS. Do the following:
 - a. Install Microsoft's rewrite module (https://www.iis.net/downloads/microsoft/url-rewrite).
 - b. In the base server's rewrite configuration, open the IIS Manager.
 - c. Click on the main server.
 - d. In the Management area, click on **URL Rewrite**.
 - e. Right-click on the inbound rule block; then click on the ${\bf Add}$ ${\bf Rules(s)...}$ option in the menu that appears.
 - f. Select **Blank rule**.
 - g. Select **OK**.
 - h. In the Edit Inbound Rule window, do the following:
 - In the Name field, enter a name for the rule.
 - From the Requested URL drop-down list, select Matches the Pattern.
 - From the **Using** drop-down list, select **Exact Match**.
 - From the **Pattern** drop-down list, select /**OpenAPI**.

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- From the Action type drop-down list, select Rewrite.
- In the Rewrite URL field, enter /Prescott/OpenAPI (or whatever your application name is).
- Select the **Apply** link to save the rule.
- 4. Set Up SSL on the Server. Do the following:
 - a. Open the IIS Manager.
 - b. Click on the server.
 - c. Double-click on Server Certificates.
 - d. Select the Create Self-Signed Certificate link on the right-hand side of the window.
 - e. On the Create Self-Signed Certificate window, do the following:
 - 1. Enter a friendly name for the certificate in the field provided.
 - 2. Select Web Hosting as the certificate store for the new certificate using the drop-down list provided.
 - 3. Select the \mathbf{OK} button. This will generate a certificate mapping for the server's current name.
 - f. Once the certificate is generated, do the following:
 - 1. expand the server.
 - 2. Expand Sites.
 - 3. Right-click on the Default Web Site; then select the Edit Bindings... options from the drop-down menu that appears.
 - 4. Select the Add... button.
 - 5. On the Add Site Binding window, do the following:
 - From the **Type** drop-down list, select **https**.
 - From the IP address drop-down list, select All Unassigned.
 - In the Port field, enter 443.
 - From the SSL Certificate drop-down list, select the SSL certificate previously generated.
 - Select the **OK** button.

Configure for Workflow Processing Offloading (Basic and Advanced)

To configure for Workflow Processing offloading (both Basic and Advanced licenses), do the following:

- 1. Make sure that the offload server is broadcast publicly. Click here for more information.
- 2. Using the Primary Server's DP Web Manage Cluster app, click on the **Add Server** button.
- 3. Enter the IP address of the Offload Workflow Processing (Basic/Advanced) server.
- 4. Select the Save button when you are done.

This adds the workflow processing offload server to the cluster.

Configure for Mobile Connectivity Offloading

To configure for Mobile offloading, you must edit the system configuration file for bEST Server. Do the following:

- 1. Go to the c:\ProgramData\Konica Minolta\Prescott\etc directory.
- 2. Open the **system.conf** file.
- 3. Edit the host "127.0.0.1" default setting of the XMPP Server Host/IP address to point to the IP address of the server (either a primary server or a Workflow Processing Offload server) running Dispatcher Phoenix.
- 4. Save the file.
- 5. Restart IIS or KMBS bEST Server from Windows Services (depending on your configuration).

Configure for Web Connectivity Offloading

To configure for Web offloading, you must edit the system configuration file for Dispatcher Phoenix Web. Do the following:

- 1. Go to the c:\Program Files\Konica Minolta\Dispatcher Phoenix Web directory.
- 2. Open the **system.json** file.

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- 3. Edit the host "127.0.0.1" default setting of the XMPP Server Host/IP address to point to the IP address of the server (either a primary server or a Workflow Processing Offload server) running Dispatcher Phoenix.
- 4. Save the file.
- 5. Restart the Dispatcher Phoenix Web Server from Windows Services.

Installing Failover Servers

Note: This feature may not be available in certain regions. For more information, please contact your Konica Minolta representative.

To install and configure a Dispatcher Phoenix Failover Server, do the following:

Step 1: Purchase Failover License

To begin, purchase a Failover license.

Step 2: Install Failover License

Once a license has been purchased and you have received a Purchase Code, you can install the Failover license on the server that you have designated for that purpose. Follow these steps:

- 1. Launch the Dispatcher Phoenix Installer.
- 2. Choose the base package license of the primary server from the drop-down list; then select the **Install Application** button. For example, in the following illustration, a Dispatcher Phoenix Office Failover license is being installed:



- 3. Select the **Install Application** button.
- 4. Select the **Yes** button on the User Account Control pop-up window that appears.
- 5. Select the **Next** button on the window that appears. See the following illustration for an example:

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- 6. Select the I accept the agreement radio button on the License Agreement window; then select the Next button.
- 7. Review the Readme text file; then select the **Next** button.
- 8. On the Select Additional Tasks window, customize the set up; then select the **Next** button.
- 9. Select the **Install** button on the Ready to Install window to begin the installation process.
- 10. Once the Dispatcher Phoenix Registration window appears, select the **Next** button.
- 11. On the Register Dispatcher Phoenix window, do the following:
 - Enter your SEC account credentials in the **User Name** and **Password** fields.
 - Paste your Purchase Code in the **Purchase Code** field.
 - Select the **Activate** button.

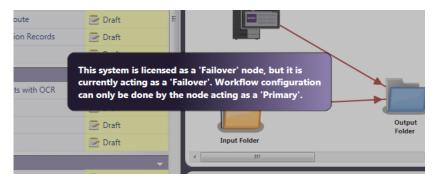
See the following illustration for an example:



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- 12. On the Congratulations message that appears, select the **OK** button. Add In Manager will continue with the installation process.
- 13. Select the **Close** button when the installation process is complete.

An inactive Failover server cannot run workflows. If you launch the application on the Failover server, the following message will appear:



Workflow Control

DP Web includes a "Workflows" tool that allows you to control workflows (run, pause, stop, or check status) without direct access to the Dispatcher Phoenix server. In addition, you can use the Workflows tool to view the number of active inputs currently in use and access the License Usage Report.

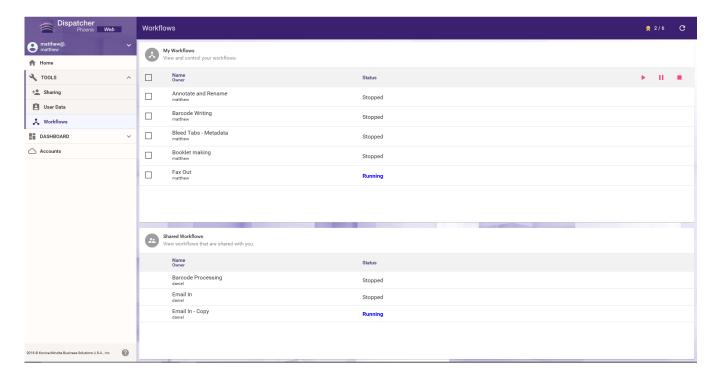
Access the Workflows App

From Dispatcher Phoenix Web, select the **Workflows** tile or the **Tools > Workflows** option from the slide out menu. On the Workflows page, you can do the following:

- View and Control Workflows. This page displays all workflows that have run successfully at least once in the Dispatcher Phoenix client application. The workflows are organized as follows:
 - My Workflows This area displays the logged-in user's workflows. The list includes the workflow name, the owner of the workflow, and its
 current status.
 - Shared Workflows This area displays the workflows that have been shared with the logged-in user. The list includes the workflow name and its current status. These workflows cannot be selected and cannot be started, paused, or stopped.
- View License Counts. The number of Active Input licenses currently being used and the number of licenses available for use. The license count displayed will be dynamically updated each time a workflow is started, stopped, or paused.
- Refresh. The page automatically refreshes the list of workflows every 10 seconds. To refresh the Workflow list manually, click on the Refresh icon.

See the following illustration for an example:

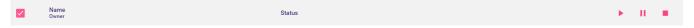
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Control Workflows

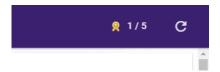
To run, pause, or stop workflows, do the following:

- 1. Check the box(es) next to the workflow(s) that you are interested in, or check the top box to select all workflows.
- 2. Hover your mouse over the workflow that you are interested in; then click on the **Run**, **Pause**, or **Stop** icons that appear to start, pause or stop the selected workflow(s). The status for that workflow will change accordingly.
- 3. To start all selected workflows, click on the icons that appear on the top row, as in the following illustration:



View License Counts

The top-right corner of the Workflows page displays the number of Active Input licenses currently being used along with the total number of licenses available. For example, in the following illustration, the user is licensed for 5 Active Inputs and 1 Active Input is being currently used:



To access a detailed report on the total number of licenses owned and the number of licenses in use for each license category (e.g., Active Inputs and user licenses for Workstation, Batch Indexing, and Dispatcher Phoenix Mobile), click on that Active Input License Count display to generate the License Usage Report.

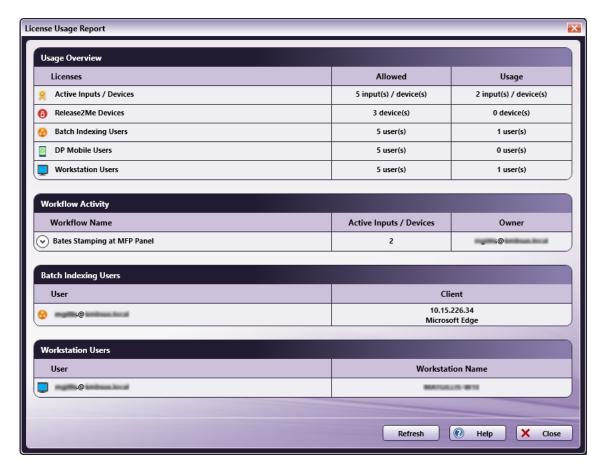
Usage Report

The Usage Report displays information about active inputs and user licenses that are currently being used and are available.

Only modules for which your installation has licenses will show in this section. For example, if you do not have any Workstation licenses, the row for Workstation Users will be omitted in the Usage Overview.

See the following illustration for an example:

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This report includes:

- Usage Overview Information. This area displays high-level information about:
 - $\circ~$ The total number of unique Active Inputs currently in use and available.
 - The total number of user licenses for Batch Indexing, Workstation, and Dispatcher Phoenix Mobile currently in use and available.
- Workflow Activity Information. This area lists the name of any active workflows that are owned by the logged-in user or shared to the logged-in user, along with the number of Active Inputs that the workflow is consuming and the name of the workflow's owner. All Active Inputs being used will be displayed even if they are used in multiple running workflows. If no workflows are currently running, this area will not appear. To view detailed information about the Active Inputs that are used in a specific workflow, click anywhere in the list. In the following illustration, since the "Route" workflow includes an Input Folder and MFP Panel node, the Input Folder's directory path and the MFP's IP Address are displayed:



- Batch Indexing Users Information. This area lists the users who are currently using the Batch Indexing tool and information about the client that is being used (IP address and Browser). Batch Indexing Users consume a license when a user starts a Batch Indexing process for the first time. This area will only appear if at least one Batch Indexing user license is being used.
- Workstation Users Information. This area lists the name of the Workstation users and the Workstation that they are licensed to. Workstation Users consume a license when a user creates a New Batch in the Workstation for the first time. This area will only appear if at least one Workstation user license is being being used.
- **Dispatcher Phoenix Mobile Users Information.** This area lists the name of the users who are currently using the Dispatcher Phoenix Mobile app and the mobile device(s) they are connected to. **DP Mobile Users** consume a license when a mobile device is connected to the Dispatcher Phoenix Server within the DP Mobile App. This area appears only if at least one Dispatcher Phoenix Mobile user license is being used. For more information, see the **Dispatcher Phoenix Mobile User's Guide**.

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• Refresh button. Select this button to refresh and update the window.

Workflow Sharing

Using the DP Web's **Sharing** app, you can assign (or revoke) permissions to users or user groups to edit or view a **workflow**. This allows the owner of the workflow to share and control workflow access (granting permissions to only specific people or departments).

Dispatcher Phoenix provides the ability to share workflows to:

- · None Only the creator of the workflow has access to the workflow. This is the default.
- Everyone The running workflow can be accessed by anyone who has access to the computer.
- · Specific Users/Groups Only assigned users/groups will have view/edit access to the workflow.

For information on accessing shared workflows at the MFP, click here.

Permissions

Using the Sharing app, you can do the following:

- **Grant View Permissions.** When the owner of a workflow assigns View permissions to a particular user or user group, that user/group has read-only access to the workflow for use. In other words, workflows cannot be started, stopped, scheduled, etc.
- **Grant Edit Permissions.** When the owner of a workflow assigns Edit permissions to a particular user or user group, that user/group can do the following to the workflow: edit, start, stop, pause, schedule, export, resume, copy and paste the workflow. Note that users with Edit permissions will not be able to delete workflows.

Note: If a user who has been granted "Edit" permissions copies/pastes a workflow, that copied workflow becomes local for that user only. No one will have access to the copied workflow.

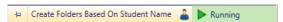
• Revoke View/Edit Permissions. The owner of a workflow can remove view or edit permissions for a particular user/group.

Note: If a user within a group has already been assigned a specific permission ("Edit" or "View"), that permission takes priority over the group-assigned permission. For example, if User A has "View" permissions and User A is part of a group that has "Edit" permissions, User A will still retain only "View" permissions for that workflow.

Sharing Icons

Workflows that have been shared (either to everyone or specific users/groups) will be identified by icons displayed next to the workflow in the Dispatcher Phoenix client application's Workflow List the next time the application is launched.

• If a workflow has been shared with a specific user(s), the following icon will appear:



If a workflow has been shared with all users, the following icon will appear:



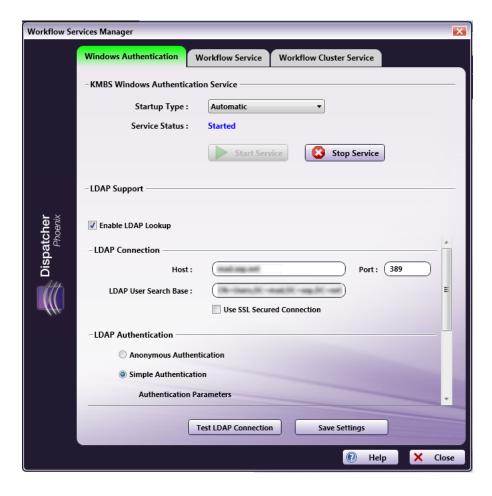
Configuring for LDAP Look Up

If configuring for LDAP card look up, you must first set up a connection to your AD/LDAP server using the Workflow Services Manager.

Do the following:

- Launch the Workflow Services Manager (Start Program > Workflow Services Manager). If prompted, enter the domain's administrator credentials.
- 2. On the Workflow Services Manager, make sure the Windows Authentication tab is selected. See the below illustration for an example:

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- 3. Click on the **Stop Service** button.
- 4. Check the **Enable LDAP Lookup** box to enable support for LDAP (Lightweight Directory Access Protocol). Once enabled, connection, search and authentication options must be entered to match the LDAP server, as follows:
 - Host Enter the name of the server where the Active Directory (AD) server is hosted.
 - Port Enter the AD server port.
 - LDAP User Search Base Enter your search starting point in the LDAP server tree structure.
 - Use SSL Secured Connection Check this box to enable SSL connections to the LDAP server, if necessary.
 - **Simple or Anonymous Authentication** Specify the type of LDAP authentication (Anonymous, which specifies that the connection should be made without passing credentials, or Simple, which specifies that basic authentication should be used on the connection).
 - Bind DN Enter the user on the external AD server permitted to search the LDAP directory within the defined search base.
 - Password Enter the bind password.
 - **Default Search** Configure the search attributes.
 - Fallback Search Enter additional search strings, if necessary.
- 5. You can test the search settings by selecting the **Test LDAP Connection** button.
- 6. Select the Save Settings button when you are done.
- 7. Click on the **Start Service** button.

Access the Sharing App

From Dispatcher Phoenix Web, select the **Sharing** button or the **Tools** > **Sharing** option from the slide out menu.

Using the Sharing App

The Sharing App displays the following by default:

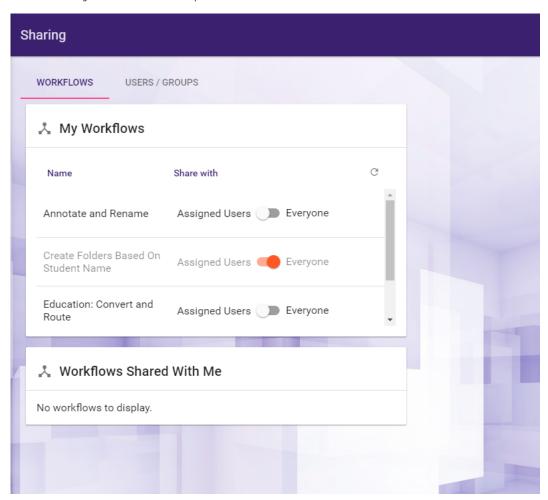
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- A **My Workflows** area that displays the logged-in user's running or scheduled to run workflows along with controls that allow you to assign workflow permissions to everyone or specific users/groups.
- A **Workflows Shared With Me** area that displays all workflows that have been shared with the logged-in user, displaying the workflow's name and owner. The workflows that are shared with the logged-in user are read only.

Note: If a workflow is shared with a group, individual members of the group will not be able to view the shared workflow under the **Workflows Shared With Me** section when logged into Dispatcher Phoenix Web; however, that workflow will be accessible at the MFP to those group members.

The default view is the Workflows Perspective.

See the following illustration for an example:



Using the Workflows Perspective

Granting Permissions To Specific Users

To grant edit/view permissions to a specific user or users within an Active Directory group, do the following:

- 1. Click on a workflow from the ${\bf My\ Workflows}$ area.
- 2. In the **Available Users/Groups** area, enter a specific user/group name in the empty field provided OR leave the field blank to return all users/groups from the authentication server; then click on the **Search** button.

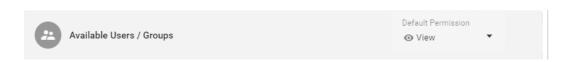
Note: To return any groups to which the user belongs, check the Include Groups to which a matching User belongs box.

- 3. From the **Available Users/Groups** area, check the **Permission** box next to the user/group that you are interested in. The box will turn green and have a plus sign in it.
- 4. Next to the **Permission** box, click on the down arrow to select the permission that you would like to grant (View or Edit). See the following illustration for an example:

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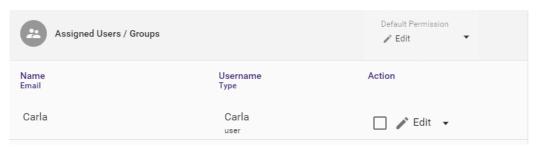
Name Email	Username Type	Permission
Carla	Carla user	◯ View
Caroline	Caroline user	☐ / Edit

You can specify a default Permission behavior to always appear by selecting an option in the top Default on click area, as shown in the following illustration:



5. Click on the Apply button.

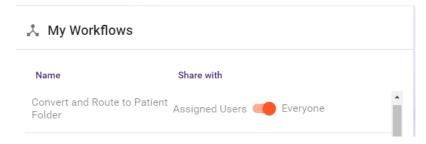
The assigned user/group will be displayed in the **Assigned Users/Groups** area. In the following illustration, Carla has been assigned Edit permissions to the workflow:



Sharing Workflows To All Users

To share the workflow with all users, slide the **Share With** control to **Everyone** in the **My Workflows** area. The color of the control will change to orange

See the following illustration for an example:



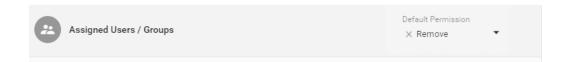
Any workflow that is shared to Everyone will appear disabled.

Removing Workflow Permissions

To remove a user's edit/view access to a workflow using the Workflows Perspective, do the following:

- 1. Click on a workflow from the My Workflows area.
- 2. Check the box next to the user in the **Assigned Users/Groups** area; then choose the **Remove** option. You can specify a default Permission behavior to automatically appear by selecting an option in the "Permission" area, as in the following illustration:

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3. Click on the **Apply** button. The user will no longer have edit/view rights to that workflow, and the user's name and email address will be removed from the **Assigned Users/Groups** area.

Changing Workflow Permissions

To change a user's edit/view access to a workflow using the Workflows Perspective, do the following:

- 1. Click on a workflow from the My Workflows area.
- 2. Check the box next to the user in the Assigned Users/Groups area; then choose the permission that you would like.
- 3. If you have specified a default behavior by selecting from the top Permission area, you can check the Permission box next to the user. The box will turn blue and the permission behavior will automatically change to the default behavior assigned. See the following illustration for an example:



4. Click on the **Apply** button.

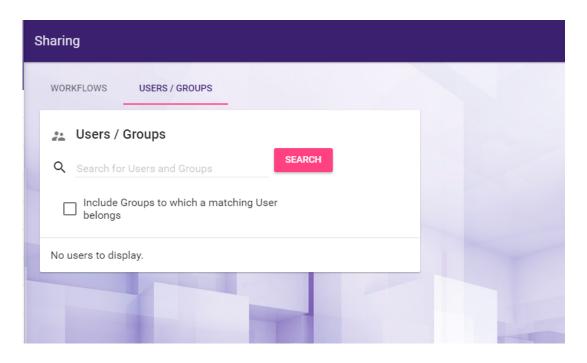
Change Perspectives

You can switch the perspective to display users/groups on the left-hand side of the page instead of workflows by clicking on the **Users/Groups** tab on the top, as in the following illustration:



The page will change to display a Users/Groups area on the left-hand side of the page. This area displays the users/groups detected by the system from the configured authentication server (e.g., Active Directory, LDAP, etc.)

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Using the Users/Groups Perspective

Assigning Workflow Permissions To Specific Users

To assign workflow permissions to specific users using the Users/Groups perspective, do the following:

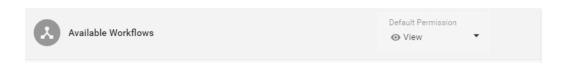
1. In the **Users/Groups** area, enter a specific user/group name in the empty field provided OR leave the field blank to return all users/groups from the authentication server; then click on the **Search** button.

Note: To return any groups to which the user belongs, check the Include Groups to which a matching User belongs box.

2. Select a user from the search results. Any workflows that have been already assigned to that user will display in the **Assigned Workflows** area on the right-hand side of the window.

Note: Any workflows that are currently shared to "Everyone" will not be displayed in the Available Workflows list.

3. From the **Available Workflows** area, check the **Permission** box next to the workflow that you are interested in; then choose the permission that you would like to grant (View/Edit). You can specify a default Permission behavior by selecting an option in the "Default Permission" area, as in the following illustration:



4. Click on the **Apply** button.

The user will now have edit/view access to that workflow. The workflow will appear under the Assigned Workflows area.

Removing Workflow Permissions

To remove a user or group's access to a workflow using the Users/Groups perspective, do the following:

- 1. Select the user from the **Users/Groups** area on the left-hand side of the window.
- 2. Under the **Assigned Workflows** area, check the Permission box next to the workflow that you are interested in; then choose the Remove option. The Permission box will turn red and an X will appear in it.
- 3. Select the **Apply** button. The user will no longer have edit/view access to that workflow, and the workflow will be removed from the **Assigned Workflows** area and will be added back to the **Available Workflows** list.

Changing Workflow Permissions

To change a user or group's access to a workflow using the Users/Groups perspective, do the following:

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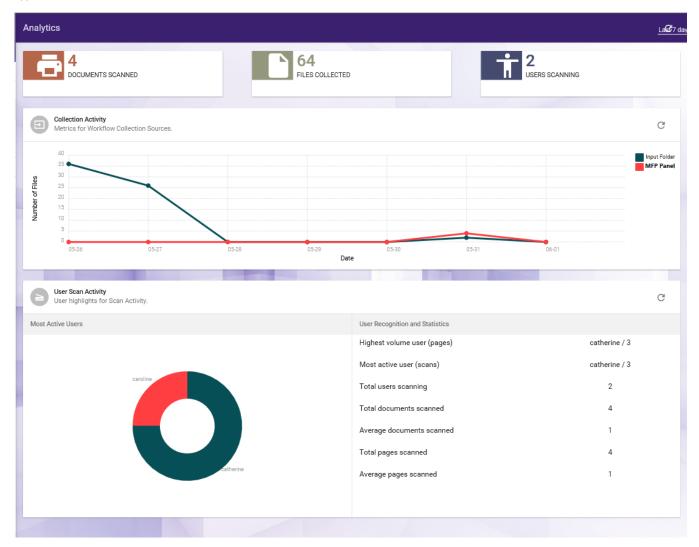
- 1. Select the user from the **Users/Groups** area on the left-hand side of the window.
- 2. Under the **Assigned Workflows** area, check the Permission box next to the workflow that you are interested in; then choose the permission that you would like. The Permission box will turn green and a + will appear in it.
- 3. If you have specified a default behavior by selecting from the top Permission area, you can check the Permission box next to the workflow. The box will turn blue and the permission behavior will automatically change to the default behavior assigned.
- 4. Select the Apply button.

Analytics

Dispatcher Phoenix Web provides access to an easy-to-read, real-time Dashboard of analytics regarding your servers and processes.

To enable auditing, you must first check the **Enable workflow auditing** box from the **Database Setup** tab of the **Options** window in the Dispatcher Phoenix client application. (To access the Options window, select **Tools > Options**).

From Dispatcher Phoenix Web, select the **Analytics** button or the **Dashboard > Analytics** option from the slide out menu. The following page will appear:



This page is populated with the following information:

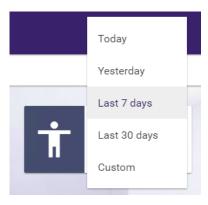
- Total number of documents scanned (for all users).
- The number of files collected.
- The number of users scanning documents.
- The number of files collected, per input source.
- A visual break-down of scan activity, including:
 - Highest volume user

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- Most active user
- · Total users scanning
- · Total documents scanned
- Average documents scanned (per day)
- Total pages scanned
- Averages pages scanned (per day)
- User Scan Activity Displays top 5 user activity details.

Customizing Your Dashboard View

To adjust the date range, select the Last 7 days drop-down list on the upper right-hand side of the page. The following menu will appear:



You can choose to display statistics for:

- · Last 7 days (default view)
- Today
- Yesterday
- Last 30 days
- Custom

Configuring Custom Date Range

If you select **Custom** to configure a custom time period for your reporting data, calendar icons will appear, as in the following illustration:



You can choose the date ranges using the pop up calendars; then select the APPLY button.

User Data

DP Web includes a "User Data" app that allows you to manage your DP Web user profile and user storage variables.

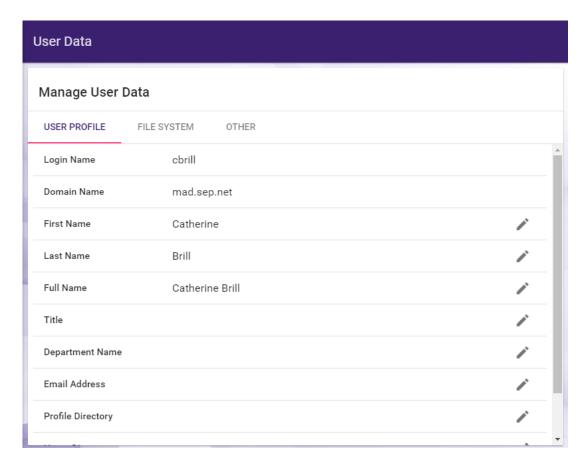
Access the User Data App

From Dispatcher Phoenix Web, select the **User Data** button or the **Tools > User Data** option from the slide out menu. The User Data page will display with the following links:

- User Profile Displays a list of user profile fields that can be edited.
- File System Displays a list of default directories used by Dispatcher Phoenix. You can view the variables that are set and modify them, if necessary.
- Other Displays other user variables that can be removed.

See the following illustration as an example:

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Manage User Profile

The User Profile page displays profile fields for the logged-in user. Each field will have an Edit icon next to it, as in the following illustration:



If you are connected to Active Directory or LDAP, the fields will be prepopulated with settings from the AD/LDAP system.

Important! AD/LDAP settings will always take precedence over any user-specified changes.

To edit your DP Web user profile, do the following:

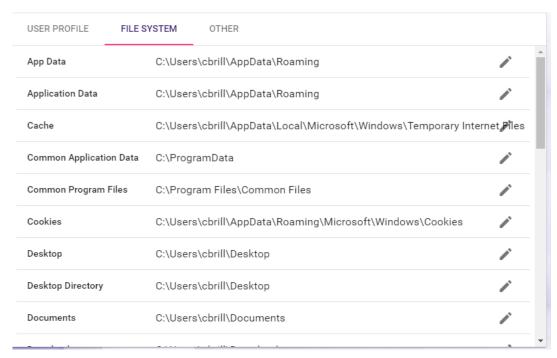
- 1. Click on the ${\bf Edit}$ icon next to the following fields to modify them:
 - First name The first name that is associated with the logged-in user.
 - Last name The last name that is associated with the logged-in user.
 - Full Name The full name that is associated with the logged-in user.
 - $\circ~$ Title The job title that is associated with the logged-in user.
 - $\circ~$ **Department Name** - The name of the department that is associated with the logged-in user.
 - $\circ~$ $\textbf{Email}~ \textbf{Address}~ \cdot \text{The}~ \text{email}~ \text{address}~ \text{that}~ \text{is}~ \text{associated}~ \text{with}~ \text{the}~ \text{logged-in}~ \text{user}.$
 - **Profile Directory** The profile directory that is associated with the logged-in user.
 - Home Directory The home directory that is associated with the logged-in user.
 - **Groups** The group that the logged-in user belongs to.
- 2. Once you click on the **Edit** icon, an Update pop-up window will appear for the specific field. Use that window to enter a new setting for the field; then select the **Update** button. For example, in the following illustration, an email address is being added to the user profile:

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Manage File System Defaults

The File System page displays the default directories used by Dispatcher Phoenix Web. Each field will have an **Edit** icon next to it, as in the following illustration:

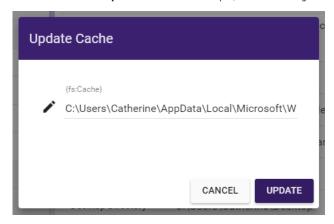


To edit these defaults, do the following:

- 1. Click on the ${\bf Edit}$ icon next to the following fields to modify the default directories for:
 - App Data
 - Application Data
 - Cache
 - Common Application Data
 - Common Program Files
 - Cookies
 - Desktop
 - Desktop Directory
 - Documents
 - Downloads
 - Favorites
 - History

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- Local App Data
- Local Application Data
- My Music
- My Pictures
- My Video
- Net Hood
- Personal
- · Print Hood
- Program Files
- Programs
- Recent
- Send To
- Start Menu
- Startup
- System
- Templates
- 2. Once you click on the **Edit** icon, an Update pop-up window will appear for the specific field. Use that window to enter a new setting for the field; then select the **Update** button. For example, in the following illustration, the Cache directory is being updated:



Card Registration

Card Registration Overview

The Card Registration Tool allows you to map ID cards (e.g., HID Proximity, iCLASS and MIFARE etc.) to users within your organization's Directory Server. Once registered, the card can be used for MFP authentication as well as logging into Dispatcher Phoenix at the MFP via single sign-on.

You can also scan a card to return its user registration information within the LDAP server. This allows you to see if a card has already been registered to another user.

To use the Card Registration Tool, you should do the following:

- 1. Set up the Card Reader.
- 2. Set up the MFP for authentication.
- 3. Log into Dispatcher Phoenix Web; then click on the Card Registration card. See the following illustration for an example:

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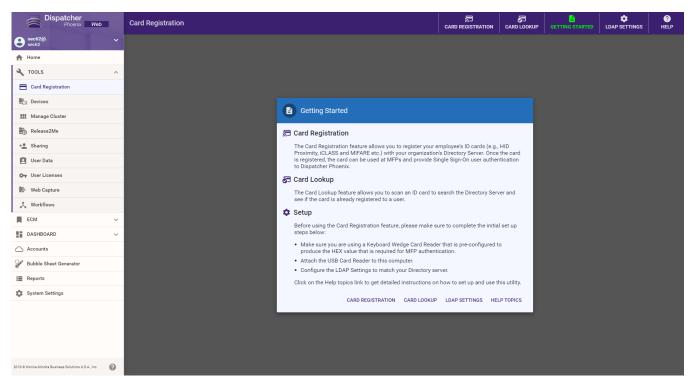


- 4. Configure the LDAP Settings within the Card Registration Tool.
- 5. Register cards for users.
- 6. Look up card information.

This tool also provides help information to get you started and keyboard shortcuts.

TIP: We recommend that you register only one card first with the Card Registration tool to ensure it can be used to authenticate at the MFP; then you can continue registering all other cards.

The Card Registration Tool resembles the following illustration:



Requirements

In order to use the Card Registration tool, note the following requirements:

- The Card Reader must have a Keyboard Wedge interface.
- The Card Reader must be attached to your computer.
- You must have an LDAP administrator account that is capable of updating LDAP for other users.
- The LDAP Settings configured within the Card Registration Tool must match the LDAP Server.

Set Up the Card Reader

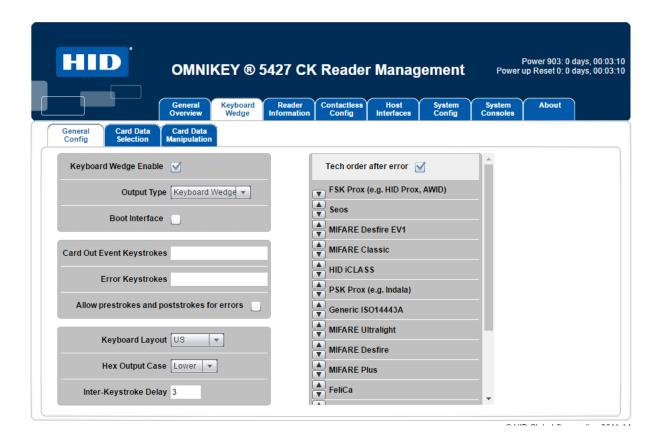
First, you should set up the card reader to ensure that it sends the HEX value that the MFP requires for authentication.

Important! The card reader used with the Card Registration Tool must have the same configuration as the Card Reader used at the MFP.

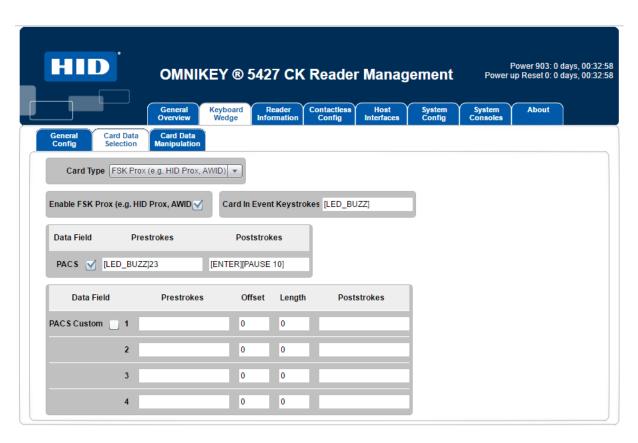
For example, with the Konica Minolta AU-205H, you would do the following:

1. **Configure General Settings.** This is where you would enable Keyboard Wedge functionality. With this functionality enabled, the device computes like a keyboard and outputs the data as a series of keystrokes. See the following illustration for an example:

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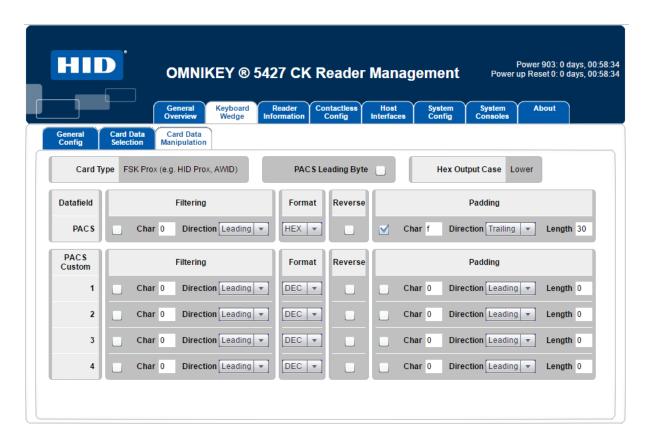


2. **Configure Card Data Selection.** You need to specify the card type, select the data that is to be read from the card and reported across the keyboard interface automatically, and set the Keyboard Wedge actions once a card is detected by the reader. See the following illustration for an example:



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3. Configure Card Data Manipulation. Use the Card Data Manipulation tab to format the output, as in the following illustration:



Set Up the MFP for Active Directory with Card Reader Authentication

Next, you should set up the MFP for Active Directory/LDAP authentication either at the MFP or via a PageScope Web Connection. You will need to log in as an administrator to perform these instructions.

You must configure the following on the MFP:

- 1. Time
- 2. DNS server
- 3. External server settings
- 4. Card reader authentication

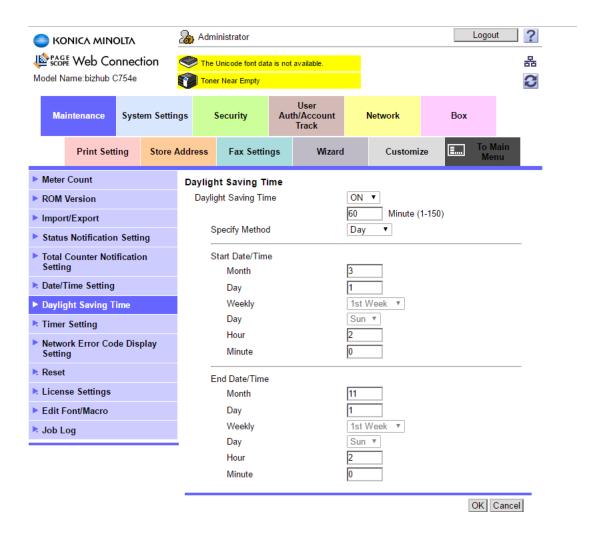
Note: These instructions use PageScope Web Connection for MFP configuration.

Configuring the MFP's time

You must ensure that the MFP's time is set up to match the card reader. Do the following:

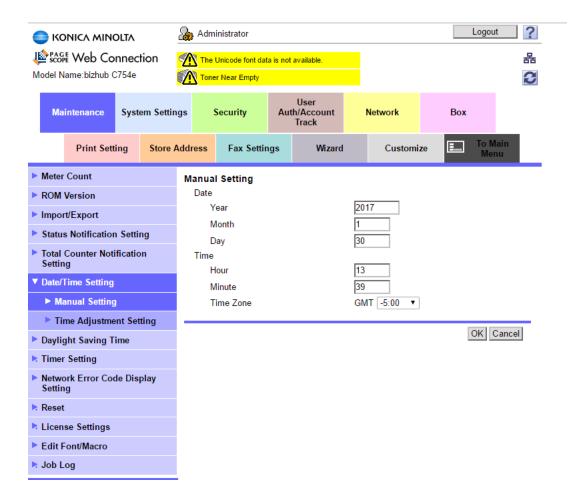
1. In the administrator mode, select **Daylight Saving Time** and ensure that **ON** is selected in the **Daylight Saving Time** drop-down, as in the following illustration:

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2. The timezone should be set to the appropriate settings for your location. For example, for the East Coast of the United States, the setting would be GMT -5:00. Go to **Date/Time Setting** > **Manual Setting** to set the **Time Zone**, as in the following illustration:

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- 3. Select Date/Time Setting > Time Adjustment Setting to configure the MFP to use the NTP (Network Time Protocol) server. Do the following:
 - a. Set the server address to "pool.ntp.org".
 - b. Select the **Adjust** button to force the MFP to update the time correctly.

See the following illustration for an example:

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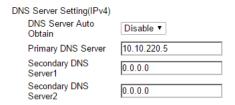


Configuring the MFP's DNS Server

Next, you must manually enter the IP address of the Active Directory domain server system. You can do the following:

- 1. In Administrator mode, select Network.
- 2. Select TCP / IP from the left hand menu.
- 3. Select the **Disable** option form the DNS Server Auto Obtain drop-down list.
- 4. Enter the IP address of the Active Directory domain server system in the Primary DNS Server field.

See the following illustration for an example:



Configuring External Server Settings

Next, you should register an external server with the domain name of the Active Directory domain that will be used for authentication. Do the following:

- 1. In Administrator mode, select User Auth / Account Track.
- 2. Select ${\bf External\ Server\ Settings}$ from the left hand menu.
- 3. Select the first external server slot; then select the **Edit** button. See the following illustration for an example:

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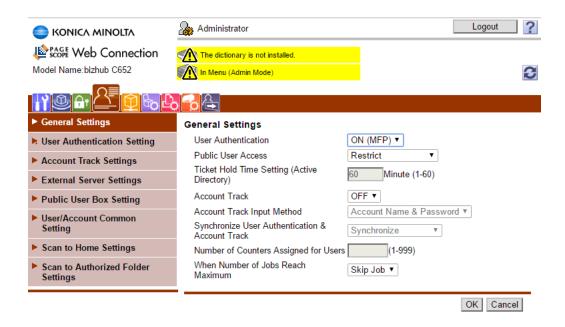
► General Settings	Exte	External Server List					
▶ User Authentication Setting	No.	Default	External Server Name	External Server Type	Edit	Delete	
► Account Track Settings	1	0		7.	Edit	Delete	
External Server Settings	2				Edit	Delete	
► Public User Box Setting	3				Edit	Delete	
▶ User/Account Common	4				Edit	Delete	
Setting	5				Edit	Delete	
► Scan to Home Settings	6				Edit	Delete	
Scan to Authorized Folder	7				Edit	Delete	
Settings	8				Edit	Delete	

4. On the External Server Registration page, enter an external server name and default domain name of the Active Directory domain in the supplied fields. Please note that the External Server Name is a label that is displayed to the user only; it is not required to be the server name. See the following illustration for an example:

► General Settings	External Server Registration	
User Authentication Setting	No.	1
Account Track Settings	External Server Name	KMAD
External Server Settings	External Server Type Active Directory	Active Directory ▼
Public User Box Setting	Default Domain Name	kmad.com
User/Account Common Setting	NTLM Default Domain Name	
Scan to Home Settings	NDS	
Scan to Authorized Folder	Default NDS Tree Name	
Settings	Default NDS Context Name	
	LDAP	
	Server Address	Please check to enter host name.
	Port No.	389 (1-65535)
	Enable SSL	
	Port No.(SSL)	(1-65535)
	Search Base	
	Timeout	60 sec. (5-300)
	General Settings	Simple ▼

5. On the General Settings page, choose the **ON (MFP)** option from the User Authentication drop-down list, as in the following illustration:

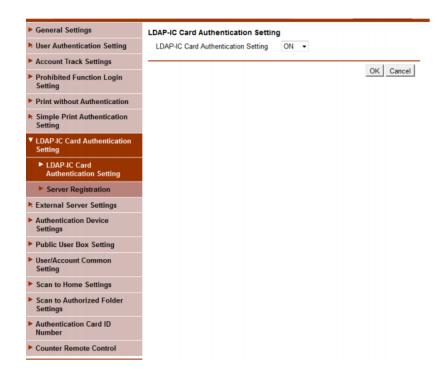
Konica Minolta 1429 / 1597



Configuring Card Reader Authentication

Finally, you should configure the MFP settings so that authentication is performed in the LDAP server using the card ID registered in the authentication card. Do the following:

- 1. In Administrator mode, select User Auth/Account Track > LDAP-IC Card Authentication Setting > LDAP-IC Card Authentication Setting.
- 2. Choose the On option for the LDAP-IC Card Authentication Setting, as in the following illustration:



- 3. Configure the LDAP system you will be querying for card information, filling in the following fields:
 - Server Address
 - Search Base
 - General Settings Authentication Type
 - Login Name (which should be administrator)

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- · Password (you must first check the Password is changed box; then enter the administrator password)
- Domain Name
- Search Attribute. Please note that the attribute you enter here (i.e., pager) must match the attribute entered in the LDAP attribute for registering card data field in the Card Registration Tool's LDAP Settings.
- User Name Attribute. Please note that the attribute you enter here must match the attribute entered in the LDAP attribute for acquiring user account name field in the Card Registration Tool's LDAP Settings.
- $\bullet \ \ \text{External Server Connection. Specify the server registered when Configuring External Server Settings}. \\$

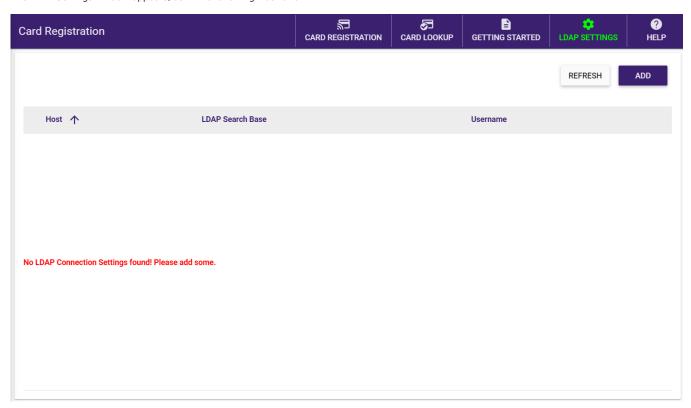
Configure LDAP Settings

After the card reader has been configured and the MFP has been set up for LDAP authentication, you must set up the LDAP Settings within the Dispatcher Phoenix Card Registration tool. This set up needs to be done only once. To configure the LDAP Settings, see the sections below.

LDAP Settings

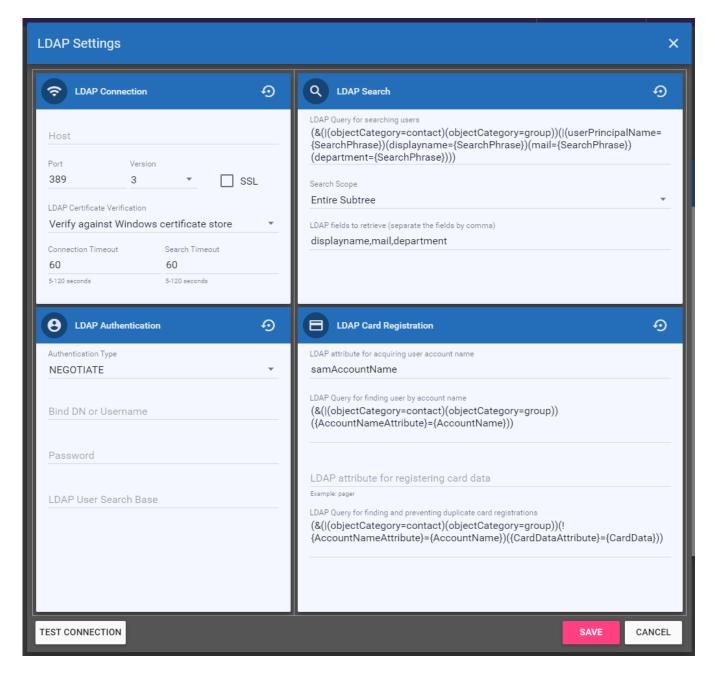
On the Card Registration Tool, select LDAP SETTINGS from the toolbar.

The LDAP Settings window appears, as in the following illustration:



To add an LDAP connection, click the Add button, which opens the LDAP Settings modal, as in the following illustration:

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LDAP Connection

On the LDAP Settings window, configure your LDAP server connection by entering the following information:

- Host Enter the name of the server where LDAP is hosted.
- Port Enter the LDAP server port.
- **Version** Select the LDAP version from the drop-down list. Note that Version 3 (the default setting) is backward-compatible to versions 1 and 2. For this reason, we recommend you keep the default setting.
- SSL To require the LDAP server to make an SSL-encrypted connection, select this box.
- LDAP Certificate Verification If you check the box at the SSL field, use this field to specify your method of LDAP server certificate verification. You have the following options:
 - Verify against Windows certificate store This option verifies the LDAP server certificate using the certification authorities set in Windows. If you select this option, ensure a valid LDAP server certificate issued by a trusted certificate authority is installed on the domain server.
 - **Ignore verification, this is a trusted server** We recommend this option for self-signed certificates. This option accepts any certificate for a TLS connection.

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- Connection timeout Enter the maximum number of seconds to establish an LDAP connection. If no connection is made in the allotted time, the connection terminates.
- Search timeout Enter the maximum number of seconds to search for LDAP data before abandoning the search.

LDAP Authentication

Specify authentication information about the LDAP Server by choosing/entering the following information:

- Authentication Type The drop-down menu provides the following options:
 - DIGEST
 - KERBEROS
 - NEGOTIATE This is the default response. This option uses Microsoft Negotiate authentication for the connection.
 - NTLM
 - SIMPLE

Note: Due to Microsoft security enhancements, as of March, 2020, this option will not sustain a connection unless the **SSL** box is checked and a SSL certificate is installed on the domain server.

- Bind DN or User Name Enter the user on the external server permitted to search the LDAP directory within the defined search base. Note that the {user}@{domain} variables will be replaced with information coming from the MFP and are necessary to perform the search.
- Password Enter the bind password.
- Base DN or Search Base The search base must match the set up on the MFP.

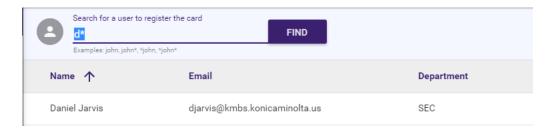
LDAP Search

Enter properties necessary to search for the user in the LDAP server, using the following fields:

- LDAP Query for searching users In this field, enter a query that will search for the user in LDAP based on the characters that are entered in the Card Registration Tool's Search field. If using Active Directory, the default LDAP Query will not need to be modified; however, if you are using a different implementation of LDAP, you may have to change this query to suit your server.
- Search Scope This is the starting point of the LDAP search. You have the following options:
 - Base Search only the entry at the specified root.
 - One Level Search all entries one level under the specified root.
 - Entire Subtree Search all entries at all levels under and including the specified root.
- LDAP fields to retrieve These are the attributes that will be returned from the LDAP server. You can add a friendly name to be displayed for the column header by enclosing it in quotes. For example: displayname "Name" will display "Name" in the column instead of "displayname". See the illustration below for an example:

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LDAP Card Registration

Enter attributes and queries necessary for registering the card data, using the following fields:

- LDAP Attribute for acquiring user account name In this field, the attribute should match what was entered for the User Name Attribute when setting up Server Registration on the MFP.
- LDAP Query for finding user account by name This field's query is used to find the user account. If using Active Directory, this default query will not need to be modified.
- LDAP Attribute for registering card data In this field, the attribute should match what was entered for the Search Attribute when setting up Server Registration on the MFP.
- LDAP Query for finding and preventing duplicate card registrations This field's query is used to prevent any duplicate card registrations. If using Active Directory, this default query will not need to be modified.

Restore - To restore any fields back to their default settings, click this button that appears at the top of each area, as in the following illustration:



TEST CONNECTION - Click this button to test your LDAP properties.

SAVE - Click this button when done.

Register Cards

To register cards, do the following:

- 1. On the Card Registration page, type in a search phrase to search for that user in LDAP. You can use the * wildcard character in your search.
- 2. Select the Find button (or press Enter) to begin searching for that user (or all users if you have entered *).

In the Search Results, icons next to user names appear to denote which users already have a card registered to them. See the following illustration for an example of the icon:

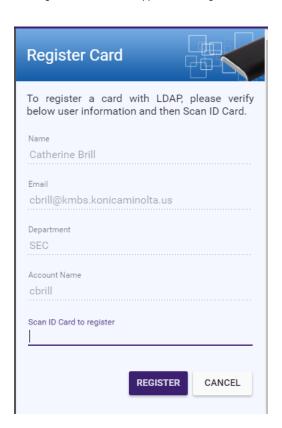


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3. Select the appropriate user from the search results. An icon will appear next to the user name to denote that an ID card can be scanned and registered to that user. See the following illustration for an example of the icon:

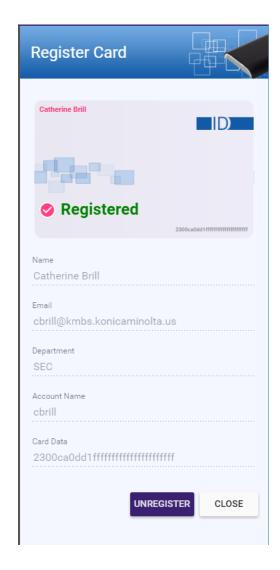


The Register Card area will appear on the right hand side of the page. See the following illustration for an example:



4. Scan the unregistered card using the Card Reader. The value of the card will immediately appear in the Scan ID card register field and the display will change, confirming the Card Registration. Now that card is paired with that user. See the following illustration for an example:

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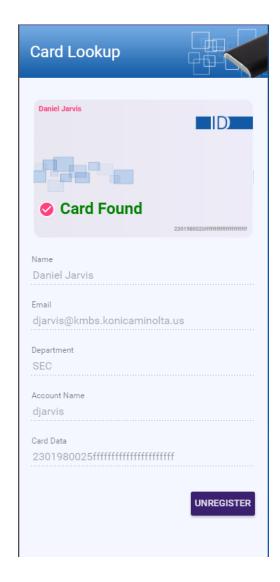
5. You can click the ${\bf UNREGISTER}$ button to remove this card registration from the user.

Look Up Card Registration

To check to see if a card has been registered, do the following:

- 1. Select **CARD LOOKUP** from the toolbar.
- 2. Scan the card using the Card Reader. The card's ID value will appear in the empty field provided. If a user is registered with that card, information about that user will appear on the right hand side of the page, as in the following illustration:

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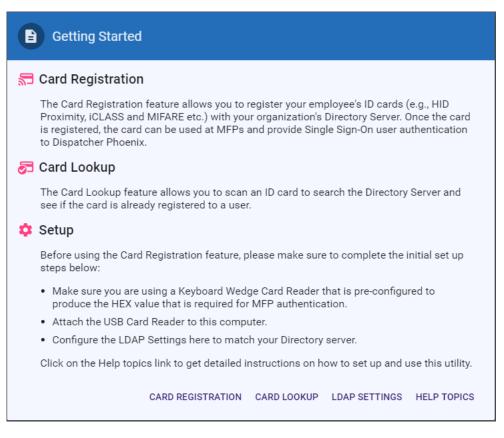
- 3. To unregister the card for this particular user, select the ${\bf UNREGISTER}$ button.
- 4. If that card has not been registered yet for a user, a message will display at the bottom of the page, as follows:



Getting Started

To view important information about using this tool, select **GETTING STARTED** from the toolbar.

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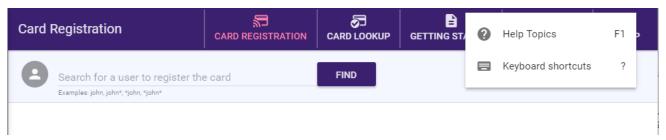
From this pop-up, you can do the following:

- Select CARD REGISTRATION to register cards.
- Select CARD LOOKUP to scan an ID card to verify who the card is registered to.
- Select **LDAP SETTINGS** to connect to your LDAP Directory and set up your search queries. This only has to be once, the first time you use this tool.
- Select **HELP TOPICS** to view help information about the tool.

Keyboard Shortcuts

Keyboard shortcuts are available for use.

Select the **Shift + ?** keys to bring up a help menu that lists all the shortcuts that you can use. You can also access the keyboard shortcut help menu from the Help drop-down, as in the following illustration:

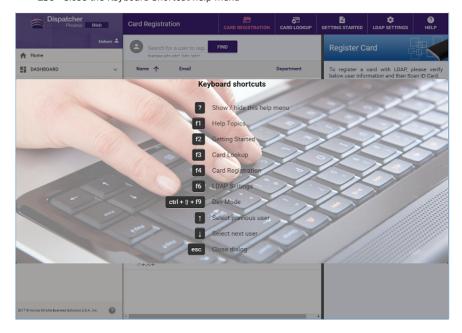


The following keyboard shortcuts are available for you:

- ? Display/Hide this help menu
- f1 Display Help Topics
- f2 Display Getting Started information
- f3 Go to the Card Lookup feature
- **f4** Go to the Card Registration feature
- **f6** Go to the LDAP Settings window

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- ctrl + Up Arrow + f9 Go into a Development mode with dummy LDAP data for demoing.
- Up arrow Select the previous user listed
- Down arrow Select the next arrow listed
- Esc Close the Keyboard Shortcut help menu



Tools

Add-In Manager

When you first open up the Add-In Manager, all nodes/packages that can be uninstalled are listed. You can also click on various items on the left-hand side of the window to either view and install updates or install new optional nodes.

When downloading/installing updates and/or new nodes, note the following:

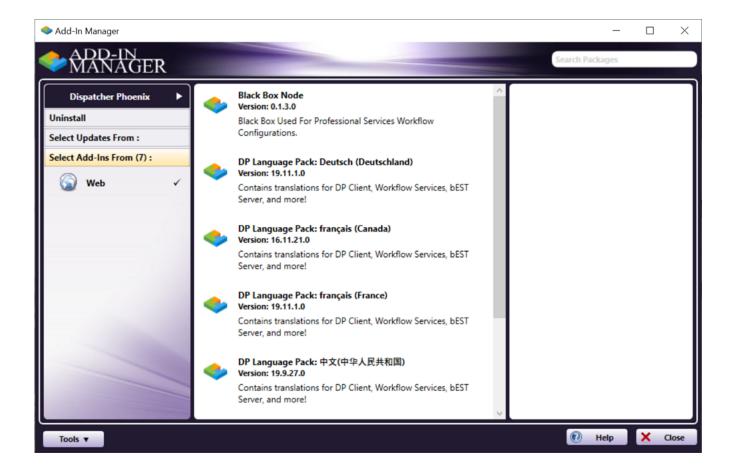
- You can minimize the Add-In Manager. You can minimize the Add-In Manager window when downloading, installing, or updating. An icon will appear in your system tray; you can double-click on it to see the progress of the operation.
- · Add-In Manager offers multi-select capabilities. You can multi-select items listed in the Add-In Manager to install or uninstall them all at once.

To open the Add-In Manager, browse all programs from your Windows Start menu until you find the Add-In Manager sub folder underneath the Konica Minolta folder. Once you click on the Add-In Manager folder, you will see the online help file for the Add-In Manager and the Add-In Manager's executable file. Click on the executable file to launch Add-In Manager.

Running as Administrator

To perform any updates, uninstalls, or installs, you must have administrative permissions. However, any user can download updates.

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Do one of the following:

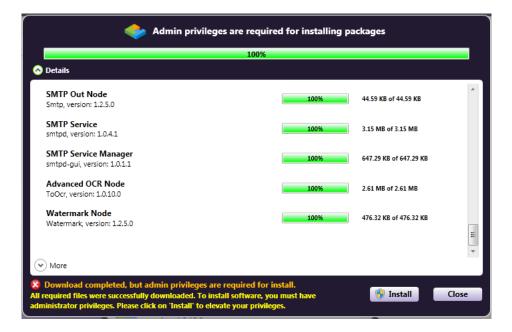
- On the Add-In Manager, select the ${\bf Run}$ as ${\bf administrator}$ button.
- From the Windows program list, right-click on the **Add-In Manager** and then select **Run as administrator** from the context menu that appears. With this procedure, the **Run as administrator** button will not appear on the Add-In Manager.

You will receive a UAC prompt. Click on the **Yes** button to continue. Administrative permissions will be granted until you close the Add-In Manager.

When Downloading Updates In Background

If Add-In Manager begins by downloading updates in the background, an Install window will appear when it is time to install. In this case, click the **Install** button to be automatically granted administrative privileges and continue with the installation:

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Key Features

Version Info

To view a list of all packages currently installed on your system, along with their version numbers, select **Version Info...** from the **Tools** pull-down menu in the Add-In Manager. The Add-In Manager Report window will open, as in the following illustration:



To narrow the list of packages displayed, use the **Search** field on the upper right hand side of the window. To remove the filtered results, simply delete the phrase in the field or click on the **X** to clear the field.

Note: Press the forward slash key to bring immediate focus to the Search field.

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To save the report as a PDF file, select the **Save As PDF** button. A Windows Save As dialog box will appear, allowing you to save the file (with a default name of AIM Report.pdf) in the appropriate location. Once saved, the PDF will be generated and automatically open.

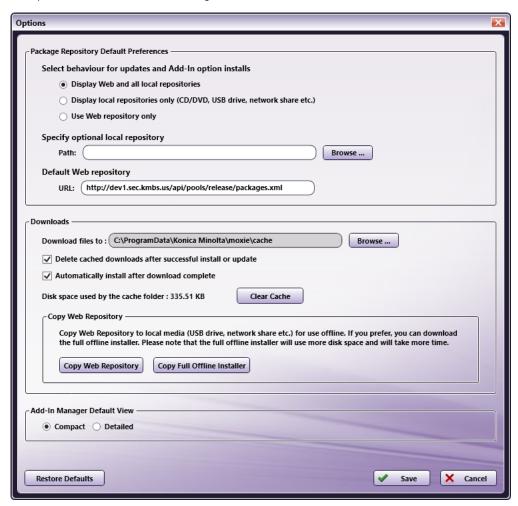
To close the Add-In Manager Report, click the Cancel button.

Note: This window can also be opened from Dispatcher Phoenix's License Manager and About box.

Options

To specify package repository preferences, copy the web repository to local media, and configuring the view of the Add-In Manager, select **Options...** from the **Tools** pull-down menu in the Add-In Manager.

The Options window resembles the following illustration:

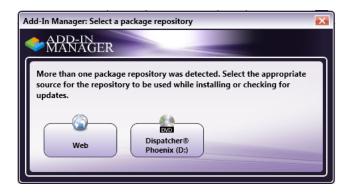


Package Repository Default Preferences

You can choose which package repository locations will be available for you to choose when updating or installing packages by selecting one of the following options from the **Select behavior for updates and Add-In option installs** options:

- **Display Web and all local repositories** This is the default setting. With this option enabled, Add-In Manager will auto-detect and then list the available package repository locations for you to choose from when multiple repository locations are detected (Web, CD/DVD, USB drive, etc.) If a network share or local drive has been specified, it will be listed also.
- When checking for updates in the application, the user will receive a message with the package repositories listed, as in the following illustration:

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When accessing Add-In Manager directly from the Windows Programs menu, the available package repository locations will be listed on the left-hand side of the window, as in the following illustration:



• Display local repositories only (CD/DVD, USB drive, etc.) – When this option is enabled, Add-In Manager will automatically attempt to use local media, such as a CD/DVD or USB drive, as the source location for the package repositories to be installed/updated. If multiple local repositories are auto-detected, the user will be prompted to choose one. If a network share or local drive has been specified, it will be listed also.

When accessing Add-In Manager directly from the Windows Programs menu, only those local source locations that include package repositories will be listed on the left-hand side of the window.

If no local repositories are detected, a warning message will appear.

• **Use Web repository only** - When this option is enabled, Add-In Manager will automatically download packages from the Internet (as indicated in the Default Web repository field).

When accessing Add-In Manager directly from the Windows Programs menu, "Web" will be listed on the left-hand side of the window.

You can also specify another local repository (i.e., network share or local drive) to be listed as an available source location for package
repositories by adding a path location to the Specify optional local repository field. You can use the Browse button to search for and find the
repository.

Downloads

- To modify the default temporary folder where cached download files are saved, click the Browse button... next to the Download files to: field.
 - By default, downloaded files that were installed or updated will be automatically deleted after install/update has completed. To disable this
 feature, uncheck the Delete cached downloads after successful install or update box.
 - To automatically install packages after they have been downloaded, check the Automatically install after download complete box.
 - To clear ALL cached files, click on the **Clear Cache** button.
- To download the web repository to a local media, such as USB drive, click the **Copy Web Repository** button. This is useful when **you are preparing to install updates in a location with limited or no Internet connection**.

Note: With this option, Add-In Manager will only check for and download new or updated packages. For this reason, make sure that the **Delete cached downloads after successful install or update** option is **disabled** when cloning remote repositories.

• To clone the full installer files, click the **Copy Full Offline Installer**. This will download all installer files and create a complete layout of an ISO to the selected media. An ISO is an image file that contains the data of an optical disc. This does not create a single ISO file, but instead downloads all files in an ISO structure. This allows you to use the installer directly from the media, instead of burning a DVD or mounting an ISO. If you do want to create an ISO, you can use any ISO image creation tool to create an ISO image from the downloaded installer files.

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Add-In Manager Default View

To configure the appearance of the Add-In Manager, do one of the following: **Compact** - The default view shows a progress bar along with a product feature slideshow **Detailed** - This view displays detailed progress messages along with the progress bar.

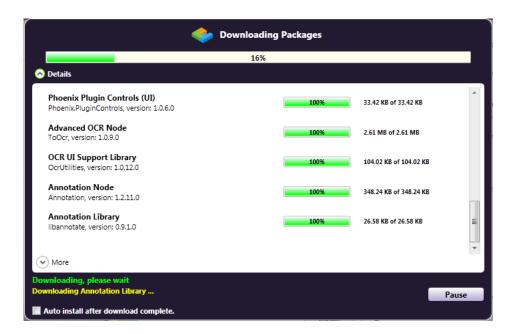
Restoring Defaults

At any time, you can switch your settings back to their default settings by clicking on the Restore Defaults button.

Downloading

All updates and new packages are downloaded first before they are installed. Installation can occur either manually or automatically after the download has completed. The following illustration is an example of the Download window. Note that it has additional fields and buttons:

• Pause - You can suspend the download process at any time by clicking on the Pause button. If you pause a download, you can resume it at the same point in the download process at a later time by clicking the Resume button.

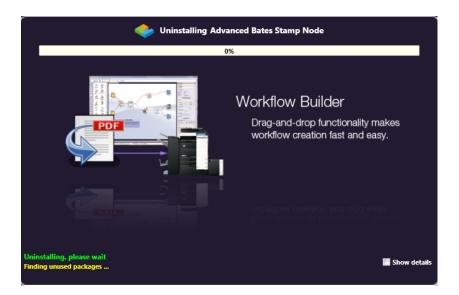


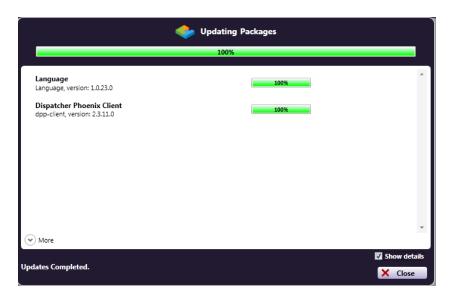
Different Views

For downloads, uninstallations, and installations, you have the choice of two views:

- Progress bar along with a product feature slideshow (**default** view)
- Progress bar along with detailed installation messages (displayed once the **Show Details** option is enabled)

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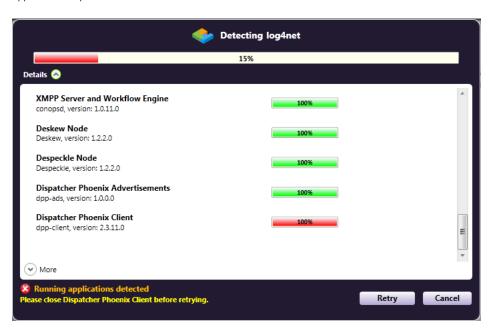
Uninstall Link

The **Uninstall** link on the left-hand side of the Add-In Manager window displays a list of all packages that are currently installed on your system. Each item includes a brief description underneath it. To view more details about a specific package, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window.

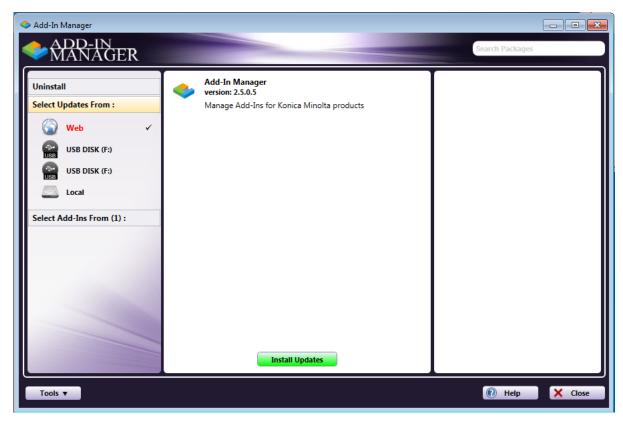
- To uninstall a specific component, select the **Uninstall** button. When you uninstall a component, its dependencies will be uninstalled as well. A confirmation message will appear to make sure that you want to uninstall that package.
- Before the uninstall operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window. The following illustration displays the error that occurs if the Dispatcher Phoenix

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application is open:



Select Updates From Link



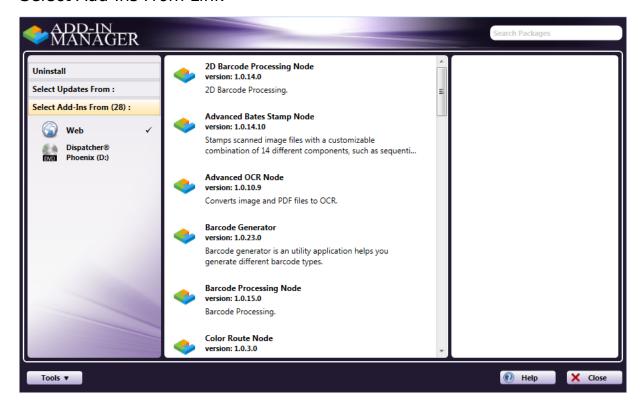
The **Select Updates From** link on the left-hand side of the Add-In Manager window displays how many updated packages are currently available to be installed (depending on the specific location that is selected). The package repository locations are dynamically detected. To change the type of locations that are listed in this area (Web + Local Repositories, Local Repositories only, or Web only), use the Options window.

Select the **Install Updates** button to begin the installation process. A confirmation message will appear to make sure that you want to install updates. Before the update operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window.

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To view more details about a specific component, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window.

Select Add-Ins From Link



The **Select Add-Ins From** link on the left-hand side of the Add-In Manager window displays the new packages that are currently available to be installed (depending on the specific location that is selected). The package repository locations are dynamically detected. To change the type of locations that are listed in this area (Web + Local Repositories, Local Repositories only, or Web only, use the Options window.

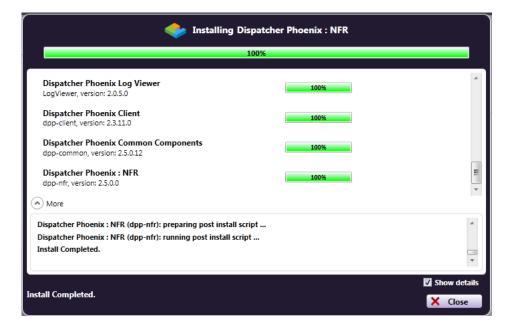
Select a package (or use the Shift + Click to select multiple packages); then select the **Install** button to begin the installation process. A confirmation message will appear to make sure that you want to install new packages. Before the install operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window.

To view more details about a specific component, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window.

Important! Before installing new packages, all updates must be installed first.

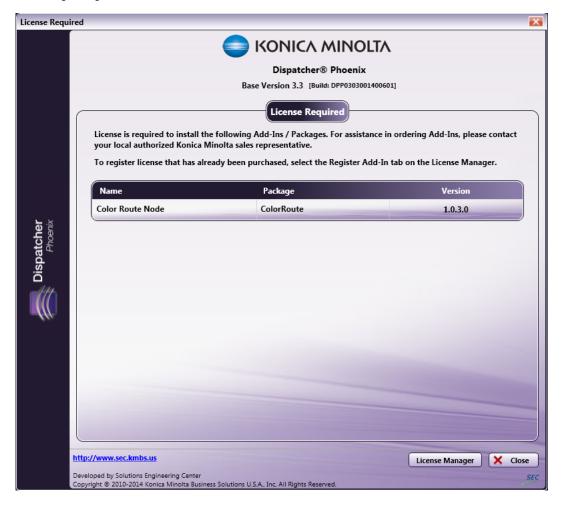
The following illustration is an example of the "detailed" view of Add-In Manager installing a new node:

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License Requirements

If the add-in module has NOT been registered yet, the License Required window will appear, listing the name, package, and version for all the add-ins that you have selected to install or update. For example, in the following illustration, the user has attempted to install the Color Route add-in module without registering it first:



On this window, you can do the following:

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- Select the Close button to close the License Required window and return to the Add-In Manager.
- Select the License Manager button to launch the License Manager window to register the add-in node.

Install Updates Without Internet Connection

If you need to install or update Dispatcher Phoenix at a site that has either no or limited Internet connection, do the following:

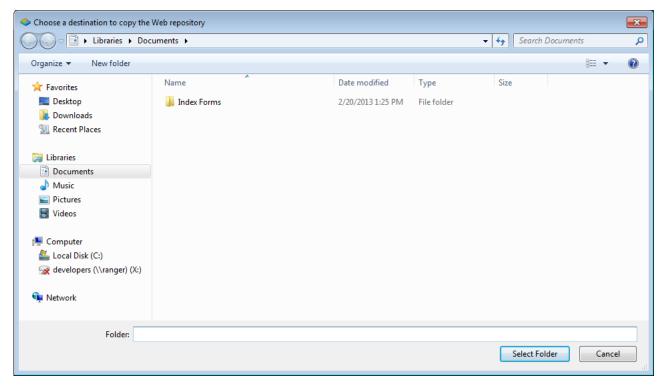
- · Copy the Web repository.
- · Install updates from that downloaded repository.

Note: For fresh installs of Dispatcher Phoenix, this process will only work if all of the Dispatcher Phoenix prerequisites (Microsoft .Net Framework 4.8, etc.) are installed.

Copy Web Repository

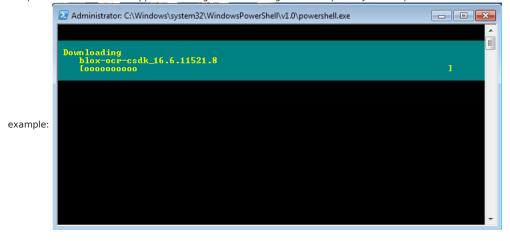
- 1. Open the Add-In Manager.
- 2. Select the Options button.
- 3. On the Options window, click on the Copy Web Repository button.
- 4. The **Choose a destination to copy the Web repository** window will open. Select some external media (e.g., USB drive) to save the repository in; then click on the **Select Folder** button.

Note: Make sure you copy the web repository to the media's root directory or any first-level directory; otherwise, Add-In Manager will not be able to auto-detect the local repository.



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The powershell.exe window appears and begins downloading the web repository to the specified location. See the following illustration for an



Install Updates From Downloaded Repository

To install updates using the repository that you just downloaded to some external media, do one of the following:

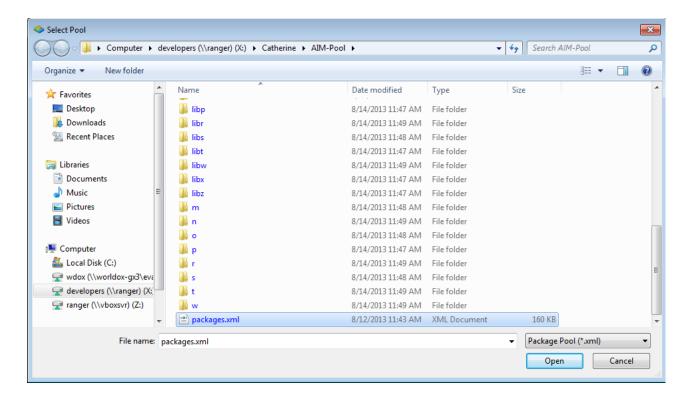
- 1. Make sure that the media on which you downloaded the web repository is connected to the system that you are trying to update.
- 2. Do one of the following:
 - From **Dispatcher Phoenix**, do the following:
 - Choose the Check for Updates option from the Help pull-down menu.
 - The Select a package repository window will appear.
 - Select the source location that contains your downloaded repository.
 - Add-In Manager will launch and begin downloading/installing files from that location.
 - From Add-In Manager, do the following:
 - Click on the **Select Updates From:** link on the left-hand side of the window.
 - Select the source location that contains your downloaded repository.
 - Select the Install Updates button.

Updating Dispatcher Phoenix From a Network Share

Downloading updates for each license may be time-consuming if a business has multiple licenses of Dispatcher Phoenix. As a solution, Add-In Manager can be configured to install all updates from a network share. To set this up, do the following:

- $1. \ \ \text{Copy the web repository}.$
- 2. Copy the downloaded repository to a network share.
- 3. Open Add-In Manager.
- 4. Select the **Options** button.
- 5. Select the Local Repository Path Browse button to find and select the packages.xml on the network share that contains the downloaded repository. See the following illustration:

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- 6. Select the **Save** button to save your changes and close the Add-In Manager.
- 7. Under the Select Updates From: link in the Add-In Manager, select the network share that is listed.

Running as Administrator

To perform any updates, uninstalls, or installs, you must have administrative permissions. However, any user can download updates.

Do one of the following:

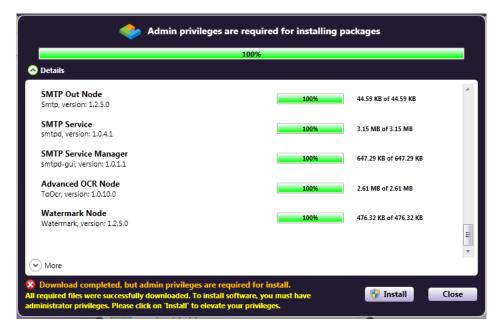
- Select the Run as administrator button on the Add-In Manager. Or,
- Right-click on the **Add-In Manager** from the Windows program list and then select **Run as administrator** from the context menu that appears. With this procedure, the **Run as administrator** button will not appear on the Add-In Manager.

You will receive a UAC prompt. Click on the Yes button to continue. Administrative permissions will be granted until you close the Add-In Manager.

When Downloading Updates In Background

If Add-In Manager begins by downloading updates in the background, the following window will appear when it is time to install:

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In this case, click the Install button to be automatically granted administrative privileges and continue with the installation.

Overview of Add-In Manager

The Add-In Manager is available from your Windows Start menu. Browse through your programs until you find the Add-In Manager subfolder underneath the Konica Minolta folder. Once you click on the Add-In Manager folder, you will see the executable file.

When you first open up the Add-In Manager, all nodes/packages that can be uninstalled are listed. You can also click on various items on the left-hand side of the window to either view and install updates or install new optional nodes.

Notes:

- Add-In Manager runs in the background when updates are downloaded automatically upon first opening the application. This is the default option for updates and can be modified in the **Options** window found in the **Tools** menu of the main application screen.
- You can minimize the Add-In Manager. You can minimize the Add-In Manager window when downloading, installing, or updating. An icon will appear in your system tray; you can double-click on it to see the progress of the operation.
- Add-In Manager offers multi-select capabilities. You can multi-select items listed in the Add-In Manager to install or uninstall them all at

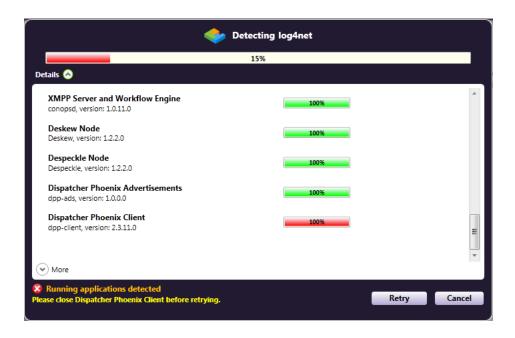
Uninstall

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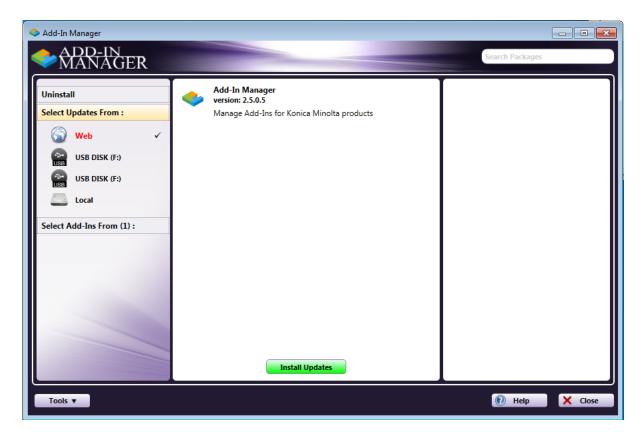
The **Uninstall** link on the left-hand side of the Add-In Manager window displays a list of all packages that are currently installed on your system. Each item includes a brief description underneath it. To view more details about a specific package, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window

- To uninstall a specific component, select the **Uninstall** button. When you uninstall a component, its dependencies will be uninstalled as well. A confirmation message will appear to make sure that you want to uninstall that package.
- Before the uninstall operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window. The following illustration displays the error that occurs if the Dispatcher Phoenix application is open:



Select Updates From

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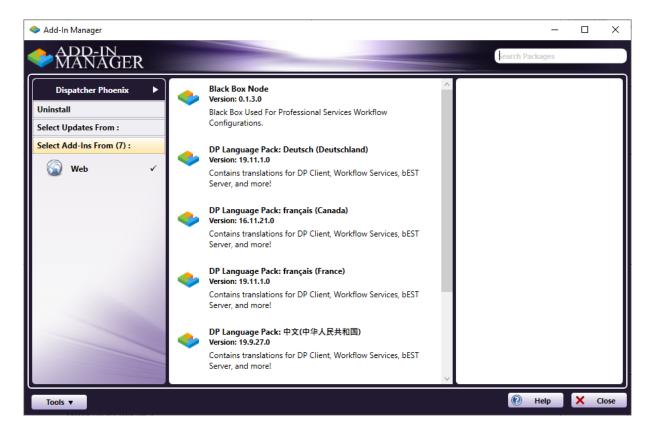
The **Select Updates From** link on the left-hand side of the Add-In Manager window displays how many updated packages are currently available to be installed (depending on the specific location that is selected). The package repository locations are dynamically detected. To change the type of locations that are listed in this area (Web + Local Repositories, Local Repositories only, or Web only), use the Options window (from the **Tools** pulldown).

Select the **Install Updates** button to begin the installation process. A confirmation message will appear to make sure that you want to install updates. Before the update operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window.

To view more details about a specific component, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window.

Select Add-Ins From

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The **Select Add-Ins From** link on the left-hand side of the Add-In Manager window displays the new packages that are currently available to be installed (depending on the specific location that is selected). The package repository locations are dynamically detected. To change the type of locations that are listed in this area (Web + Local Repositories, Local Repositories only, or Web only), use the **Options** window (from the **Tools** pull-down).

Select a package (or use the Shift + Click to select multiple packages); then select the **Install** button to begin the installation process. A confirmation message will appear to make sure that you want to install new packages.

Before the install operation begins, Add-In Manager will look for any running packages. If there are any issues found, the progress bar will turn red and a message will appear the bottom of the window.

To view more details about a specific component, click on an item in the list. A list of its dependencies will appear on the right-hand side of the window.

Note: Before installing new packages, all updates must be installed first.

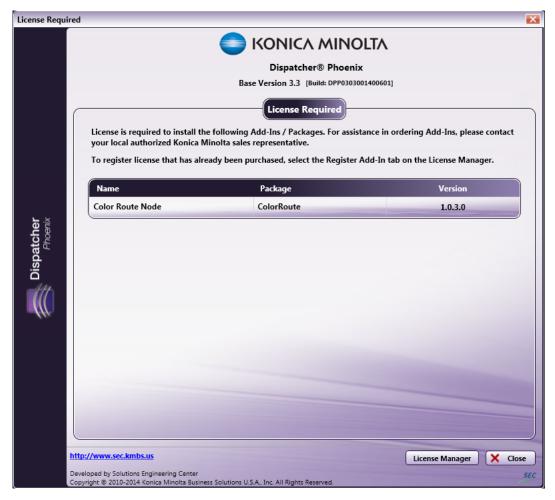
The following illustration is an example of the "detailed" view of Add-In Manager installing a new node:

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Installing Dispatcher Phoenix : NFR		
100%		
Dispatcher Phoenix Log Viewer LogViewer, version: 2.0.5.0	100%	*
Dispatcher Phoenix Client dpp-client, version: 2.3.11.0	100%	
Dispatcher Phoenix Common Components dpp-common, version: 2.5.0.12	100%	
Dispatcher Phoenix : NFR dpp-nfr, version: 2.5.0.0	100%	=
More		
Dispatcher Phoenix : NFR (dpp-nfr): preparing post install script Dispatcher Phoenix : NFR (dpp-nfr): running post install script Install Completed.		A
		▼ Show details
Install Completed.		X Close

License Requirements

If the add-in module has NOT been registered yet, the License Required window will appear, listing the name, package, and version for all the add-ins that you have selected to install or update. For example, in the following illustration, the user has attempted to install the Color Route add-in module without registering it first:



On this window, you can do the following:

• Select the **Close** button to close the License Required window and return to the Add-In Manager.

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• Select the License Manager button to launch the License Manager window where you can register the add-in node.

Using The Search Field

When looking for installed, updated, or newly created components, you might want to narrow down the list by using the **Search** field in the upper right-hand side of the Add-In Manager. When you enter a keyword in the blank field provided, the filtered results of your search will be visible for all three options (Uninstall, Updates, and Available to Install). To remove the filtered results, simply delete the phrase in the field or click on the **X** to clear the field.

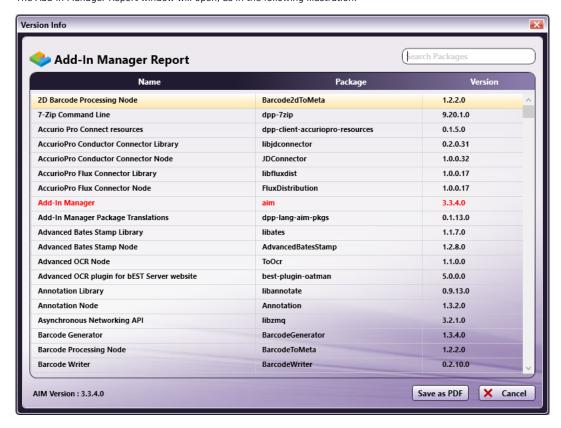
Note: Press the forward slash key to bring immediate focus to the Search field.



Checking Version Information

To view a list of all packages currently installed on your system, along with their version numbers, select **Version Info...** from the **Tools** pull-down menu in the Add-In Manager.

The Add-In Manager Report window will open, as in the following illustration:



Do the following:

• To narrow the list of packages displayed, use the Search field on the upper right hand side of the window. To remove the filtered results, simply delete the phrase in the field or click on the X to clear the field.

Note: Press the forward slash key to bring immediate focus to the Search field.

- To save the report as a PDF file, select the Save As PDF button. A Windows Save As dialog box will appear, allowing you to save the file (with a default name of AIM Report.pdf) in the appropriate location. Once saved, the PDF will be generated and automatically open.
- To close the Add-In Manager Report, click the Cancel button.

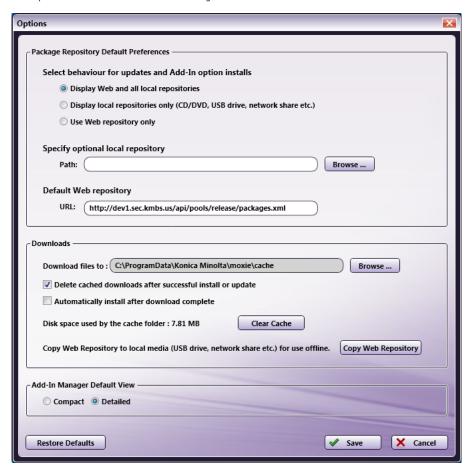
Note: You can also open this window from the License Manager or About box.

Configuring Add-In Manager Options

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To specify package repository preferences, copy the web repository to local media, and configuring the view of the Add-In Manager, select **Options...** from the **Tools** pull-down menu in the Add-In Manager.

The Options window resembles the following illustration:

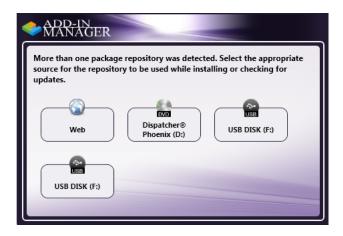


Package Repository Default Preferences

You can choose which package repository locations will be available for you to choose when updating or installing packages by selecting one of the following options from the Select behavior for updates and Add-In option installs options:

• **Display Web and all local repositories** – This is the default setting. With this option enabled, Add-In Manager will auto-detect and then list the available package repository locations for you to choose from when multiple repository locations are detected (Web, CD/DVD, USB drive, etc.) If a network share or local drive has been specified, it will be listed also.

When checking for updates in the application, the user will receive a message with the package repositories listed, as in the following illustration:



When accessing Add-In Manager directly from the Windows Programs menu, the available package repository locations will be listed on the left-hand side of the window, as in the following illustration:

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• **Display local repositories only (CD/DVD, USB drive, etc.)** - When this option is enabled, Add-In Manager will automatically attempt to use local media, such as a CD/DVD or USB drive, as the source location for the package repositories to be installed/updated. If multiple local repositories are auto-detected, the user will be prompted to choose one. If a network share or local drive has been specified, it will be listed also.

When accessing Add-In Manager directly from the Windows Programs menu, only those local source locations that include package repositories will be listed on the left-hand side of the window.

If no local repositories are detected, a warning message will appear.

• Use Web repository only - When this option is enabled, Add-In Manager will automatically download packages from the Internet (as indicated in the Default Web repository field).

When accessing Add-In Manager directly from the Windows Programs menu, "Web" will be listed on the left-hand side of the window. before installing

You can also specify another local repository (i.e., network share or local drive) to be listed as an available source location for package
repositories by adding a path location to the **Specify optional local repository** field. You can use **the** Browse button to search for and find the
repository.

Downloads

- To modify the default temporary folder where cached download files are saved, click the Browse button... next to the Download files to: field.
- By default, downloaded files that were installed or updated will be automatically deleted after install/update has completed. To disable this feature, uncheck the **Delete cached downloads after successful install or update** box. To clear ALL cached files, click on the **Clear Cache** button
- To automatically install packages after they have been downloaded, check the Automatically install after download complete box.
- To download the web repository to a local media such as a USB drive, click the Copy Web Repository button.

Note: With this option, Add-In Manager will only check for and download new or updated packages. For this reason, make sure that the **Delete cached downloads after successful install or update** option is **disabled** when cloning web repositories.

Add-In Manager Default View

To configure the appearance of the Add-In Manager, choose one of the following:

- Compact The default view shows a progress bar along with a product feature slideshow
- **Detailed** This view displays detailed progress messages along with the progress bar.

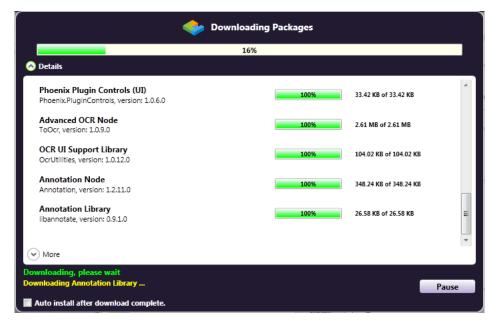
Restoring Defaults

At any time, you can switch your settings back to their default settings by clicking on the Restore Defaults button.

Downloading

All updates and new packages are downloaded first before they are installed. Installation can occur either manually or automatically after the download has completed. The following illustration is an example of the Downloading window:

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On the Downloading window, you can do the following:

- Check the **Auto install after download complete** box to automatically begin installation after the download of files has completed. Once checked, this setting applies to all future download operations.
- Select the **Pause** button to suspend the download process at any time. If you pause a download, you can resume it at the same point in the download process at a later time by clicking the **Resume** button.

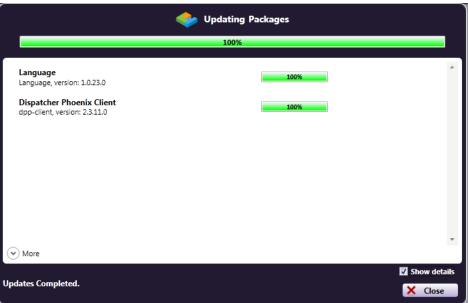
Different Views

When downloading, uninstalling, or installing, you have the choice of two views:

- A progress bar along with a product feature slideshow (**default** view)
- A progress bar along with detailed installation messages (displayed once the **Show Details** box is checked)

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MFP Simulator

The Dispatcher Phoenix MFP Simulator tool simulates Dispatcher Phoenix workflows on the MFP without requiring a connection to a physical MFP. Designed primarily as a sales tool for Konica Minolta professionals, users can interact with the virtual MFP Simulator to easily access and run workflows on an MFP. Using the Dispatcher Phoenix MFP Simulator tool, you can:

- Log in to access your workflows using different authentication options.
- · Access a list of your running workflows.
- Switch to either the **Online** or **Stand-alone** version of the MFP Simulator to demonstrate running workflows via **animation**. These versions do not require a connection to Dispatcher Phoenix.
- Choose a $\mbox{\bf device display}$ that most resembles the MFP you want to simulate.
- · Customize your workflows, for example enter index data, customize scan settings, perform folder browsing, etc.
- Select a file to scan (if using the Integrated MFP Simulator).
- Customize the layout of the MFP Simulator (if using the Integrated MFP Simulator).

The Dispatcher Phoenix MFP Simulator is available in the following forms:

• Integrated MFP Simulator

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- Online MFP Simulator
- · Stand-alone MFP Simulator

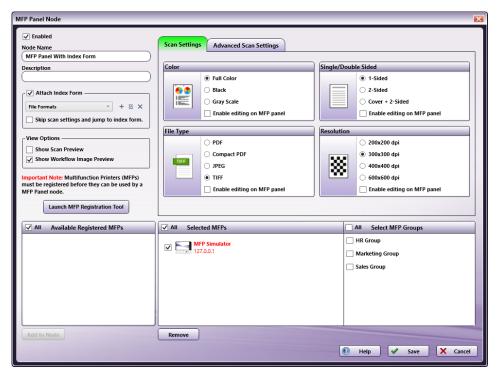
Each of the simulators has slightly different capabilities and purposes. Generally speaking, you use the Integrated MFP Simulator to access simulated versions of live Dispatcher Phoenix workflows. This version requires an active connection to Dispatcher Phoenix. You use the Online and Stand-alone simulators to access "canned" workflows for demonstration purposes. These versions do not require a connection to Dispatcher Phoenix.

In addition, each simulator can be displayed using any of the following device displays:

- bizhub
- · i-Series
- Production Print

Set Up

The Integrated MFP Simulator is always available within the MFP Panel node as an Available Registered MFP. To run your workflow on the Integrated MFP Simulator, add the MFP Simulator to the MFP Panel node's list of Selected MFPs, as in the following illustration:



Authentication Tab

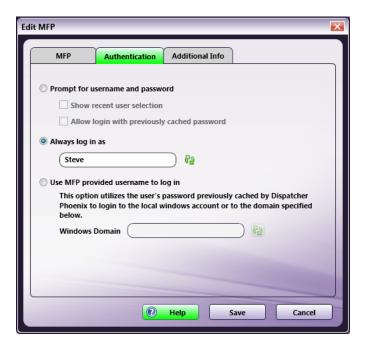
Although users cannot unregister or delete the Integrated MFP Simulator, authentication settings are configurable.

Note: Before any changes to the Authentication tab can take effect, you must first restart the Integrated MFP Simulator.

To edit the Integrated MFP Simulator's authentication options, do the following:

- 1. Launch the MFP Registration Tool.
- 2. Select the MFP Simulator from the list, then click on the **Edit MFP** button.
- 3. The **Edit MFP** window appears. From this window, click on the **Authentication** tab to edit the MFP Simulator's authentication options, as in the following illustration:

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- Prompt for username and password To require users to enter a username and password on the MFP control panel screen before
 accessing their MFP Panel workflows, select this option. With this setting, the following options are available:
 - Show recent user selection With this option enabled, users can choose a user name from a drop-down list of the last five users who have logged in, eliminating the need to manually enter this information. However, the password will still need to be entered.
 - Allow login with previously cached password With this option enabled, users can log in without entering a password. The
 previously entered password will be used.

Notes:

- If the password is changed and the MFP is restarted, the cached password will then be lost.
- If you change your Windows user name and password, you will not be able to access your MFP Panel workflows.
- Always log in as To minimize set up and quickly access your MFP Panel workflows on the control panel, you can choose to use your
 Windows log in name every time when accessing MFP Panel workflows. This option eliminates the need to manually enter a user name and
 password on the MFP control panel screen. With this option enabled, only the actively running workflows for that particular user will be
 displayed, and jobs scanned from the panel will run as that user. This field is pre-populated with the user name and domain name (if
 available) of the current user.
- Use MFP provided user name to log in This single sign-on option is designed to work with MFP or Active Directory authentication.
 Optimal for shared workflows, this option will automatically log into Dispatcher Phoenix as the user logged into the MFP. With this option enabled, the Windows Domain field will be pre-populated with the current domain of the logged-in system, and must be the same as the Domain name that the MFP is configured to use.

Note: First-time use requires manually entering a password.

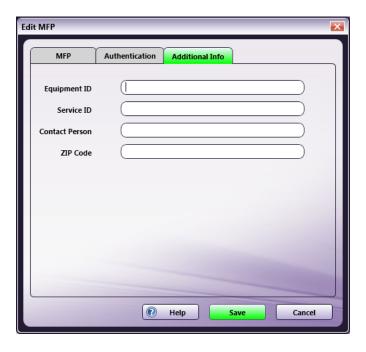
• Save - Select this button to preserve your settings and exit the window.

Additional Info Tab

To edit the Integrated MFP Simulator's additional information, do the following. These fields are optional.

- 1. Launch the MFP Registration Tool.
- 2. Select the MFP Simulator from the list, then click on the **Edit MFP** button.
- 3. The **Edit MFP** window appears. From this window, you can click on the **Additional Info** tab to edit the MFP Simulator's additional information, as in the following illustration:

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- **Equipment ID** Enter identification information for the equipment.
- Service ID Enter identification information for service.
- **Contact Person** Enter information about the contact person.
- **ZIP Code** Enter information about the ZIP Code.
- Save Select this button to preserve your settings and exit the window.

Accessing the Integrated MFP Simulator

You can access the Integrated MFP Simulator by doing one of the following:

- Tool Bar On the main application screen's Tool Bar, click on the MFP Simulator icon.
- Tools Menu On the main application screen, click on the Tools pull-down menu and choose the MFP Simulator option.
- Windows Start Menu Choose Konica Minolta > Dispatcher Phoenix > MFP Simulator.

The following illustration shows the MFP Simulator icon. The Tools menu appears to the right:



Getting Started

When you launch the Integrated MFP Simulator, the MFP's home screen appears. Depending on your setup, the Home screen for one of the following device displays will appear:

Device Displays (from left to right, $\mbox{\bf bizhub},$ $\mbox{\bf i-Series},$ $\mbox{\bf Production Print})$

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Notes:

- For Dispatcher Phoenix version 7.6 or later, the default device display is iSeries.
- For Dispatcher Phoenix version 7.5 or earlier, the default device display is bizhub.
- To access the Production Print device display, or to change to a different device display, use the **Settings** page.

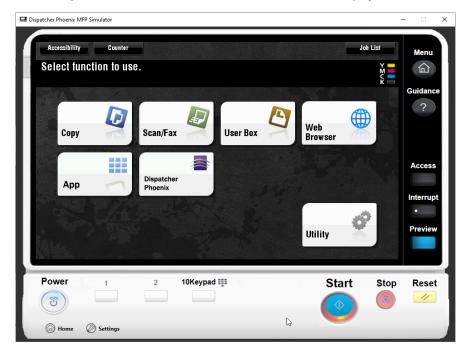
MFP Simulator Home Screens

Each MFP Simulator **device display** shows a unique Home screen designed to resemble the look and feel of an MFP Simulator type. Each type is described in this section:

- bizhub
- i-Series
- Production Print

The bizhub MFP Simulator Home Screen

The following illustration shows the Home screen for the bizhub device display:



Buttons and Icons

The following buttons and icons appear on the Home screen for the bizhub device display:

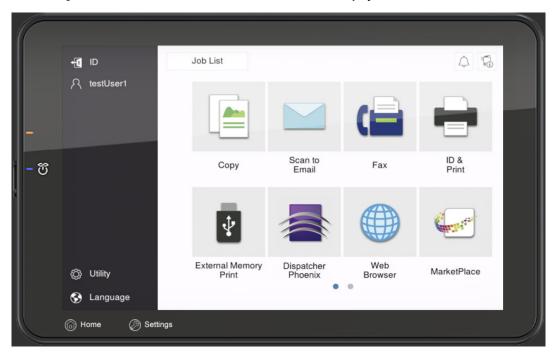
- Menu Displays the MFP Simulator's Home screen.
- Guidance Displays the version number of the MFP Simulator, along with the following buttons:
 - Settings Accesses the Settings screen where you can configure the MFP Simulator's layout and appearance.
 - **Help** Accesses the Dispatcher Phoenix Online Help file, as well as the **Reload** button.

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- Copy Displays a static image of the MFP's Copy screen.
- Scan/Fax Displays a static image of the MFP's Scan/Fax screen.
- User Box Displays a static image of the MFP's User Box screen.
- Web Browser Opens a web browser in the MFP Simulator.
- App Accesses the Workflow List screen where you can select from a list of Dispatcher Phoenix workflows.
- **Dispatcher Phoenix** Accesses the Workflow List screen where you can select from a list of Dispatcher Phoenix workflows. Note that the **Settings** screen provides the option to edit the label on this button, so the name may have been edited from "Dispatcher Phoenix".
- Utility Displays a static image of the MFP's Utility screen.
- Power Closes the MFP Simulator.
- Register Key #1 Displays the Scan/Fax screen.
- Register Key #2 Displays the Copy screen.
- 10Keypad Opens up a pop-up keypad (for display purposes only). To close the Keypad and return to the MFP Simulator, click the Cancel button.
- Start Provided for display purposes only.
- Stop Provided for display purposes only.
- Reset Displays the Copy screen.
- Home Accesses the Home screen.
- Settings Accesses the Settings screen.

The i-Series MFP Simulator Home Screen

The following illustration shows the Home screen for the i-Series device display:



Buttons and Icons

The following buttons and icons appear on the Home screen for the i-Series device display:

- ID Provided for display purposes only.
- User Name Displays the username of the logon user.
- Power This button on the left-middle of the screen closes the MFP Simulator.
- Copy Displays a static image of the MFP's Copy screen.
- Fax Displays a static image of the MFP's Fax screen.

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- **Dispatcher Phoenix** Accesses the Workflow List screen where you can select from a list of Dispatcher Phoenix workflows. Note that the **Settings** screen provides the option to edit the label on this button, so the name may have been edited from "Dispatcher Phoenix".
- Web Browser Opens a web browser in the MFP Simulator.
- Utility Displays a static image of the MFP's Utility screen.
- Home Accesses the Home screen.
- Settings Accesses the Settings screen.

The Production Print MFP Simulator Home Screen

The following illustration shows the Home screen for the Production Print device display:



Buttons and Icons

The top of the Production Print device display Home screen displays the standard Production Print status screen, including the following buttons:

- Machine Accesses the Home screen.
- Copy Displays the Production Print copy screen.
- Dispatcher Accesses the Workflow List screen, displaying a list of Dispatcher Phoenix workflows.

The bottom panel incorporates a few of the hard keys into the simulator, including the following buttons:

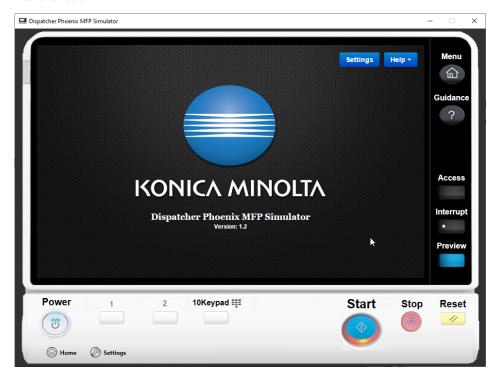
- Power Save Provided for display purposes only.
- Help Displays the version number of the MFP Simulator, along with the following buttons:
 - Settings Accesses the Settings screen where you can configure the MFP Simulator's layout and appearance.

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- Help Accesses the Dispatcher Phoenix Online Help file, as well as the Reload button.
- Accessibility Provided for display purposes only.
- Access Provided for display purposes only.
- Mode Memory Provided for display purposes only.
- **Utility/Counter** Displays a static image of the MFP's Utility screen.
- Mode Check Provided for display purposes only.
- Proof Copy Provided for display purposes only.
- Start Provided for display purposes only.
- **Reset** Displays the Copy screen for the Production Print MFP Simulator.
- Interrupt Provided for display purposes only.
- Stop Provided for display purposes only.
- Home Accesses the Home screen.
- Settings Accesses the Settings screen.

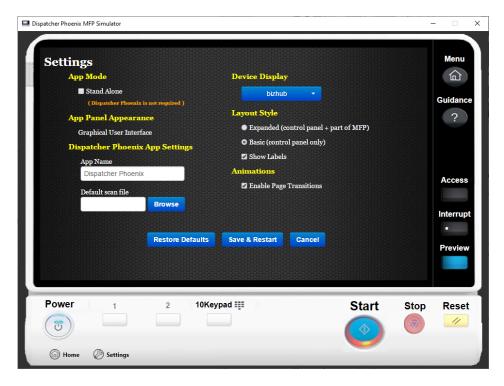
Integrated MFP Simulator Settings Screen

Use the Settings screen to set preferences for the appearance of the Integrated MFP Simulator. To access the Settings screen, click the **Guidance** button on the Integrated MFP Simulator. The Guidance screen appears. Tap on the **Settings** button on the top-right of the Guidance screen. See the illustration below:



When you tap on the **Settings** button on the top-right of the Guidance screen, the Settings screen appears. The following illustration shows the Settings screen for the bizhub **device display**.

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The following options are available. Note that the Device Display field indicates the current **device display** and determines which options appear on the Settings screen. That is, not all options are available for all device displays.

Note: Changes to the Settings screen take affect only after you tap the **Save & Restart** button. To abandon any changes you make to the Settings screen, tap the **Cancel** button. To return all settings to their default, tap the **Restore Defaults** button.

App Mode

- Stand Alone To switch to the Stand-alone MFP Simulator, check this box. The following options appear:
 - **Workflows** This setting appears only if you check the box at the **Stand Alone** field. This setting controls the demonstration workflows available in the Stand-alone MFP Simulator. The following groups of workflows are available:
 - Default
 - Finance
 - Healthcare
 - **Theme** This setting appears only if you check the box at the **Stand Alone** field. To change the color scheme of the MFP Simulator display, tap the drop-down. The following options are available:
 - Blue
 - Purple

App Panel Appearance

Currently, in the Integrated MFP Simulator, the only panel appearance option for workflows is the Graphical User Interface.

Dispatcher Phoenix App Settings

- App Name To customize the name of the Dispatcher Phoenix app button that displays on the simulated panel, enter a new name here.
- **Default scan file** To choose a sample input file to always submit to Dispatcher Phoenix workflows whenever a user presses the Scan button on the simulated panel, click the **Browse** button and browse for, then select, a file.

Device Display

The MFP Simulator provides the following simulated MFP types. Select the display that best resembles the MFP you are simulating. The following MFP types are available:

- bizhub
- i-Series

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Production Print

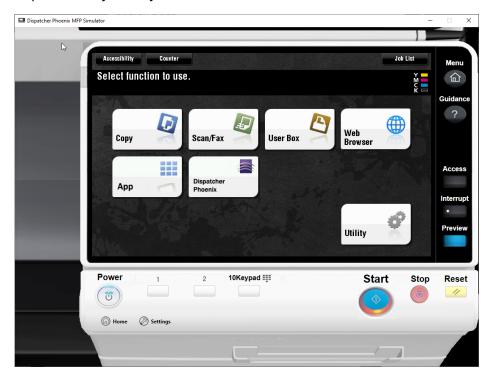
Layout Style

The following options are available to customize the layout of the MFP Simulator. See the illustrations below for examples of the settings.

- Expanded (control panel + part of MFP) Displays the MFP control panel along with parts of the MFP.
- Basic Displays the MFP control panel only.
- Show Labels To display labels above the buttons on the MFP control panel, check this box.

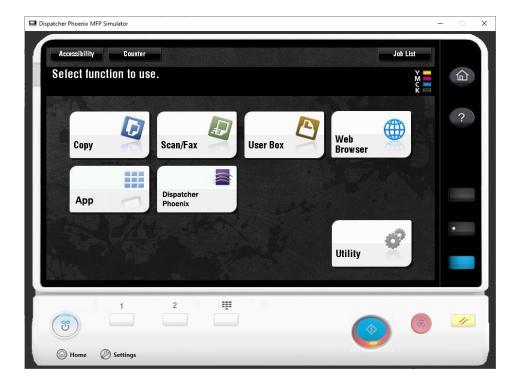
Note: The Layout Style options are available only for the bizhub device display.

Expanded Layout Style, with "Show Labels" Enabled



Basic Layout Style, with "Show Labels" Disabled

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Animations

To display animated transitions between screens in the Integrated MFP Simulator, check the **Enable Page Transitions** box on the Settings screen.

Note: Animations are not available for the Stand-alone MFP Simulator.

Using the Integrated MFP Simulator

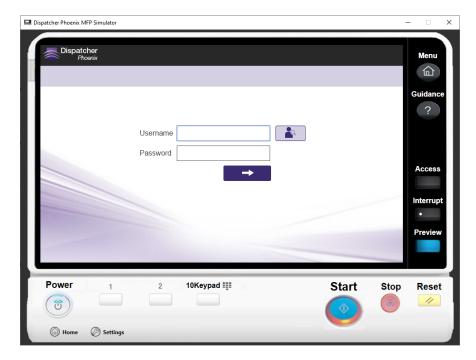
The following is an example of logging in to the Integrated MFP Simulator and accessing a Dispatcher Phoenix workflow:

- 1. In Dispatcher Phoenix, run the workflows you want to access on the Integrated MFP Simulator.
- 2. On the Integrated MFP Simulator's home screen, click on the App button or the Dispatcher Phoenix button.
- 3. Depending on the authentication options you have specified for the MFP Simulator AND how many workflows you have currently running, one of the following will appear:
 - The Log In screen
 - $\circ~$ The Workflow List screen showing a list of all running workflows
 - The Workflow List screen showing a single workflow

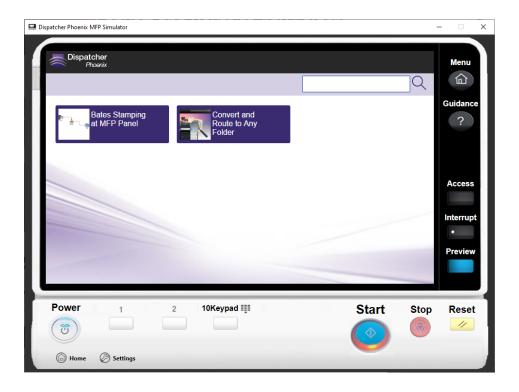
See the following illustrations:

Log In screen showing recent user selection and "Allow login with previously cached password" enabled:

Konica Minolta 1471 / 1597

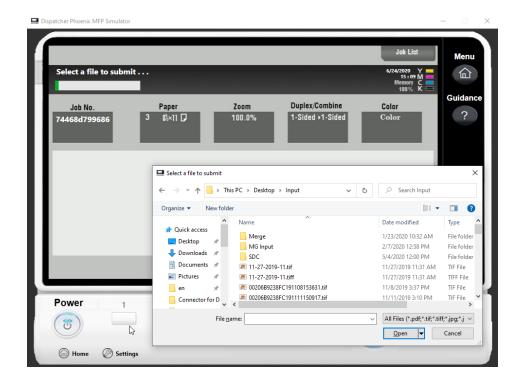


Workflow List screen:

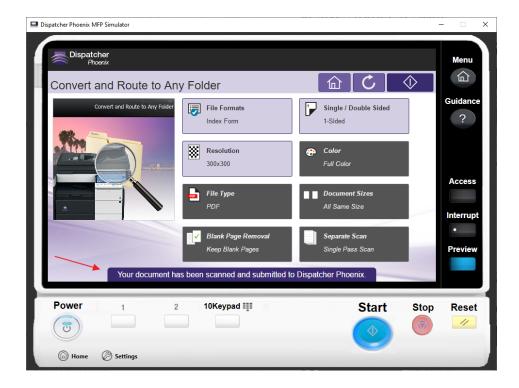


- 4. On the Workflow List screen, click on the workflow you want to access. You can customize the workflow, including entering index data, browsing through folders, customizing scan settings, modifying Bates stamps, etc.
- 5. To scan a document into the workflow, click on the **Scan** button. If you have defined a "Default Scan File" to use (on the **MFP Simulator's Settings** screen), that file is submitted directly into the workflow. If not, or if that file no longer exists on your system, the **Select a file to submit** window appears where you can select a document to run through the workflow. See the following illustration:

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6. Once the virtual scan starts, a message similar to the message on a physical MFP will appear, alerting you that the document has been scanned and submitted to the Dispatcher Phoenix workflow, as in the following illustration:



Your processed document will now appear in the output location specified in the workflow.

Using the Online MFP Simulator

The Online MFP Simulator is a version of the MFP Simulator that you access via a web page. It does not require a connection to Dispatcher Phoenix. It is similar to the **Integrated MFP Simulator** with the following exceptions:

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- **Demonstration workflows** The Online MFP Simulator provides access to many pre-defined "canned" workflows you can use to experience the power of Dispatcher Phoenix without actually connecting to the application. These workflows are not available from the Integrated MFP Simulator
- No access to live workflows Because the Online MFP Simulator is not connected to Dispatcher Phoenix, you cannot access live workflows as you can in the Integrated MFP Simulator.

Accessing the Online MFP Simulator

To open the Online MFP Simulator, do the following:

- 1. Access the **SEC website Home page**.
- 2. Log in to the SEC website.
- 3. Access the Products page.
- 4. From the Product Catalog, select Dispatcher Phoenix MFP Simulator (Online).

When the Online MFP Simulator opens, the Sign In Screen appears as in the following illustration. You must provide these credentials only once.



Once you enter your SEC credentials, the Start-up screen appears, as in the following illustration:

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On the Start-up screen, select the **Start** button to access the **Home** screen. See the following illustration:

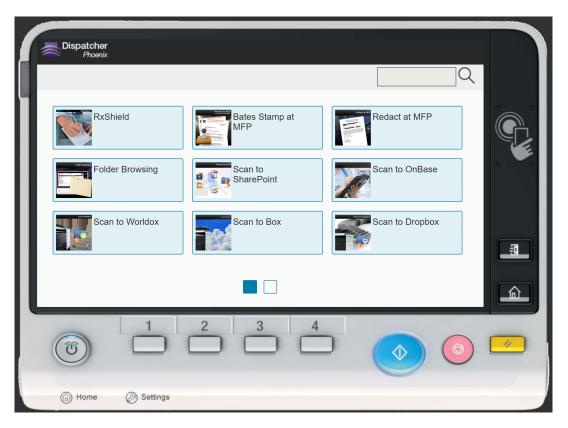
The Online MFP Simulator Home Screen (bizhub device display)



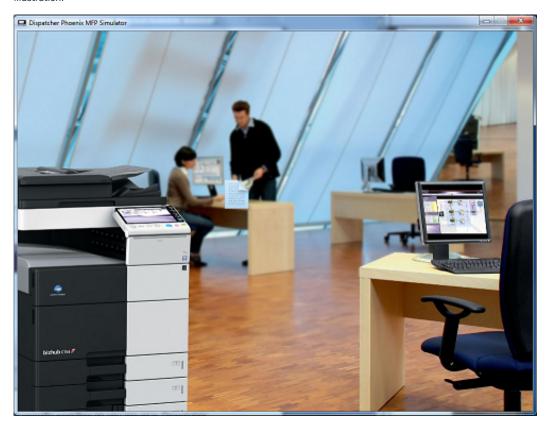
On the Home screen, to see a list of predefined, "canned" workflows, click on the either the **App** button or the **Dispatcher Phoenix** button. The Workflow List screen appears, as in the following illustration showing the bizhub workflows:

The Online MFP Simulator Workflow List Screen

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On the Workflow List screen, click on a workflow. You enter that specific workflow as you would in Dispatcher Phoenix. Once you modify the workflow and click on the **Start** button on the MFP Simulator, an animation displays showing the document going through the workflow, as in the following illustration:



The Settings Screen in the Online MFP Simulator

 $To\ access the\ Settings\ screen\ in\ the\ Online\ MFP\ Simulator,\ tap\ on\ the\ \textbf{Settings}\ button.\ The\ Settings\ screen\ appears\ as\ in\ the\ following\ illustration:$

Konica Minolta 1476 / 1597



The Settings screen includes the following drop-down menus:

- MFP Provides access to the available simulated MFP types, including the following:
 - bizhub
 - i-Series (IT6)
 - o Production (PP)
- Theme Changes the appearance of the selected simulator. You have the following options:
 - Blue
 - Purple
- Workflows Accesses additional canned workflows. The following categories are available:
 - Default
 - Finance
 - Healthcare
- Help Accesses the Dispatcher Phoenix Online Help file, as well as the Reload button.

Using the Stand-alone MFP Simulator

The Stand-alone MFP Simulator is a version of the MFP Simulator. Like the **Online MFP Simulator**, it does not require a connection to Dispatcher Phoenix. Two forms of this version are available. You can access the forms in the following ways:

- · Via the Settings page on the Integrated MFP Simulator.
- Download a true "stand-alone" version from the SEC website.

The Stand-alone MFP Simulator is similar to the Online MFP Simulator, with a few exceptions as described below.

Accessing from the Integrated MFP Simulator

- $1. \ From \ the \ Integrated \ MFP \ Simulator, \ select \ the \ \textbf{Guidance} \ button. \ The \ Guidance \ screen \ appears.$
- 2. On the Guidance screen, select the **Settings** button.
- 3. On the Settings screen, under **App Mode**, check the **Stand-Alone** box. Once you check this box, the **Workflows** field activates and you can select a different category of workflows, if desired.

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4. Still on the Settings screen, select the Save & Restart button to save your settings and view the Start-up screen, as in the following illustration:



5. On the Start-up screen, select the **Start** button to access the **Home** screen.

Downloading the Stand-alone MFP Simulator

To download a true "stand-alone" version of the Stand-alone MFP Simulator, do the following:

- 1. Access the **SEC website Home page**.
- 2. Log in to the SEC website.
- 3. Access the Products page.
- 4. From the Product Catalog, select Dispatcher Phoenix MFP Simulator (Standalone).

For more information on this process, see the **Accessing the Online MFP Simulator** section.

The Stand-alone MFP Simulator Help Menu

The Help menu in the downloaded version of the Stand-alone MFP Simulator accesses two options not available in the other MFP Simulators. The Help menu appears on the Settings screen, as in the following illustration:

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The Help menu in the downloaded version of the Stand-alone MFP Simulator includes the following options:

- Help Accesses the following options:
 - Help Topics Click to access the Dispatcher Phoenix Online Help file.
 - $\circ~\textbf{Reload}$ Click to reload the Stand-alone MFP Simulator.
 - Check for Updates Click to search for available updates to the Stand-alone MFP Simulator.
 - Customer Feedback Click to submit customer feedback.

Workflow Services Manager

The Workflow Services Manager allows you to do the following:

- · Manage Workflow Services.
- Configure LDAP support for CAC/PIV authentication.

This application can be accessed from the Windows Start Menu (All Programs > Konica Minolta). You can also perform a Windows search on "Workflow Services Manager" to find this application.

The Workflow Services Manager includes tabs containing the following key features:

- Windows Authentication
- Workflow Service
- Workflow Cluster Service

Windows Authentication

On this tab, administrators can manage the KMBS Windows Authentication Service.

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The following options are available:

KMBS Windows Authentication Service

- Startup Type Use the drop-down list to specify how/when to start the KMBS Windows Authentication Service. Options are:
 - Automatic (Delayed Start) The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - $\circ~$ Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
 - **Disabled** The user is prevented from starting the service at any point.
- Start Service To activate the service, click this button.
- Stop Service To stop the service, click this button.

LDAP Support

At the bottom of the Workflows Authentication tab are three buttons, which allow you to add and configure LDAP (Lightweight Directory Access Protocol) connections for the Workflow Services Manager. LDAP is a standard for user authentication and storage of user profile data. Dispatcher Phoenix must connect to LDAP to perform read-only queries to determine user attributes (for scanning to home directories {user:home} and email addresses {user:email}, etc.) Configuration options include:

- Sync LDAP Settings To synchronize LDAP settings, click this button.
- Add LDAP Connection To add an LDAP configuration, click this button. A new LDAP connection area appears below any previous ones. When there are multiple LDAP connection areas present, each also gets an X button to delete the connection. Dispatcher Phoenix can support up to 10 LDAP connections, at which point this button will no longer be clickable.
- Test LDAP Connection To test the search setting, click this button.

To add an LDAP connection, select the Add LDAP Connection button.

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Notes:

- · LDAP changes do not take effect until the KMBS Windows Authentication Service is stopped and started again.
- When a user first logs into Dispatcher Phoenix at the MFP, Active Directory and LDAP information is cached until the user logs out of Dispatcher Phoenix (by exiting the app on the MFP). The next time the user logs in, LDAP information will be obtained again from the Active Directory and/or LDAP.

LDAP Connection

- Type Specify the connection type. You have the following options:
 - · Active Directory
 - Novell Directory Services
 - OpenLDAP
- Host Enter the name of the server where the server is hosted.
- Port Enter the server port.
- LDAP User Search Base Enter your search starting point in the LDAP server tree structure.
- Use SSL Secured Connection To require the LDAP server to make an SSL-encrypted connection, select this box.
- LDAP Certificate Verification If you check the box at the Use SSL Secured Connection field, use this field to specify your method of LDAP server certificate verification.

Authentication Parameters

- **Bind DN** Enter the user on the external server permitted to search the LDAP directory within the defined search base. Note that the {user}@{domain} variables will be replaced with information coming from the MFP and are necessary to perform the search.
- Password Enter the bind password.

LDAP Search Options

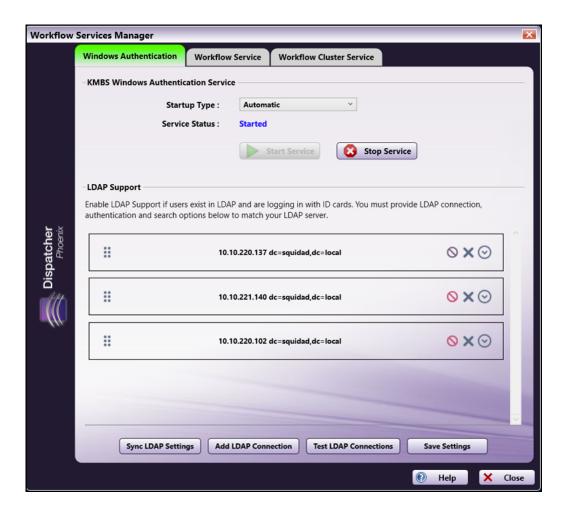
- **Filter** Enables you to define a search criterion to identify entries in a search requests. For example, (objectClass=person) is used for retrieving sub-sets of users across your LDAP directory.
- **Default Search** Configure the search attributes.
- Fallback Search Enter additional search strings.

Buttons

- Enable LDAP Connection After entering the required information, select this button to enable the LDAP connection.
- Remove LDAP Connection Deletes the associated LDAP connection.
- Expand/Collapse Clicking this button allows you to see the configuration options for LDAP or collapse them to only display vital information.

Once you have entered all the required information, select the **Save Settings** button. If you add more than one LDAP connection, they appear in a list, as in the following illustration:

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Multiple LDAP connections can be reordered by dragging and dropping the six dots icon on the right-hand side of the entry.

Workflow Service

On this tab, administrators can manage the SEC Workflow Services.

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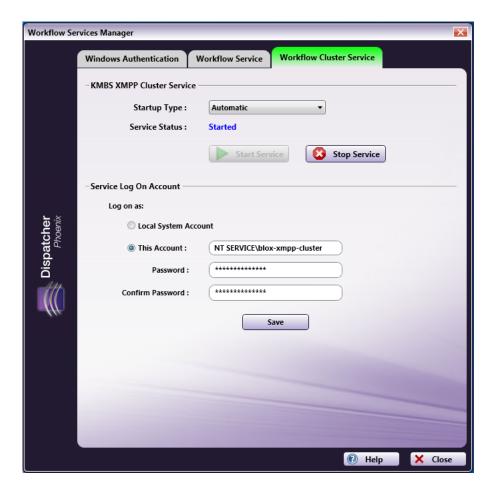
You have the following options:

- 1. From the **Startup Type** pull-down list, specify how/when the SEC Workflow Services should start. Options are:
 - **Automatic (Delayed Start)** The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
 - Disabled The user is prevented from starting the service at any point.
- 2. Activate the service by selecting the **Start Service** button.
- 3. Stop the service by selecting the Stop Service button.
- 4. Select whether or not to Broadcast to Cluster. This setting enables your server to be public so that they are accessible for cluster set up.

Workflow Cluster Service

On this tab, an administrator can manage the KMBS Workflow XMPP Cluster Service, one of the main workflow services that IT administrators can configure to run as an NT Service virtual account for CAC/PIV authentication and other security purposes.

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Virtual accounts are "managed local accounts" that provide the following features to simplify service administration:

- No password management is required.
- The ability to access network destinations (e.g., network shares, home folders, etc.) with a computer identity in a domain environment.

Do the following:

- 1. From the **Startup Type** pull-down list, specify how/when the XMPP Cluster Service s should start. Options are:
 - Automatic (Delayed Start) The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - $\circ~$ Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
 - Disabled The user is prevented from starting the service at any point.
- 2. Activate the service by selecting the **Start Service** button.
- 3. Stop the service by selecting the **Stop Service** button.
- 4. Modify the Log on type of the service:
 - $\circ~$ Select the Local System Account radio button if you do not want to run on a domain.
 - Select the This Account radio button and specify the NT virtual service account and password to have full permissions to write to the domain server.

Note: Service Log On Account changes do not take effect until the Workflow Cluster Service is stopped and started again.

Important! Dispatcher Phoenix does not support updating the Workflow Cluster Service credentials to a Microsoft Entra ID, even if Dispatcher Phoenix is configured to use a Microsoft Entra environment.

Scan To Home with LDAP Lookup using Windows NT Service Logon

To configure a "Scan to Home" workflow with LDAP lookup using Windows NT Service Logon, do the following:

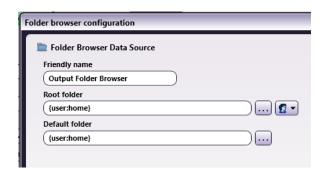
Konica Minolta 1484 / 1597

These instructions assume that a Windows NT Virtual Service account with access and full permissions to all users' home and profile paths has already been created and that the computer is joined to a domain.

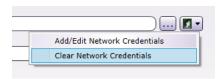
- 1. Launch the Workflow Services Manager application.
- 2. On the Workflow Cluster Service tab, change the Service Log On information to use the Windows NT Virtual Service account.
- 3. Select the **Stop Service** button; then select the **Start Service** button.
- 4. On the Windows Authentication tab, check the Enable LDAP Lookup button.
- 5. Enter LDAP configuration details in the provided fields.
- 6. Select the Save Settings button.
- 7. Select the **Stop Service** button; then select the **Start Service** button.
- 8. In the Dispatcher Phoenix main application, open the MFP Registration Tool. Edit the MFP that you want to use; then select the Authentication tab.
- 9. Choose the single sign on option in the Authentication tab, as in the following illustration:



10. When setting up the Index Form in your workflow for folder browsing, use the {user:home} variable, as in the following illustration:



11. Network credentials are not necessary. Clear any network credentials by clicking on the **Network Credentials** icon; then selecting the **Clear Network Credentials** option, as in the following illustration:



- 12. On the Dispatcher Phoenix main application screen, ensure that the workflow is shared.
- 13. At the MFP, log in with your domain user account.

Important: Adding multiple domains to the Workflow Service Manager allows for:

- Authentication at the MFP for users across multiple domains as long as the MFP is configured to use Active Directory and users are registered on the device. This configuration works with **card readers**.
- Release2Me users using the same domain that Dispatcher Phoenix is installed on can share print jobs to users on any configured domains.
- Workflow Sharing across multiple domains as long as the primary user is logged into Dispatcher Phoenix Web on the same domain as Dispatcher Phoenix.
- LDAP datasource lookup across multiple domains using an Index Form.

Reference Materials

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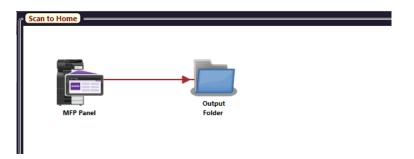
Configuring for Active Directory

Dispatcher Phoenix allows you to scan to your personal home folder using Active Directory, browse through your subfolders, and create new folders – directly at the MFP. This means that you can log into the MFP through Active Directory and access your home folder from the MFP display panel, a functionality commonly referred to as "Scan to Home."

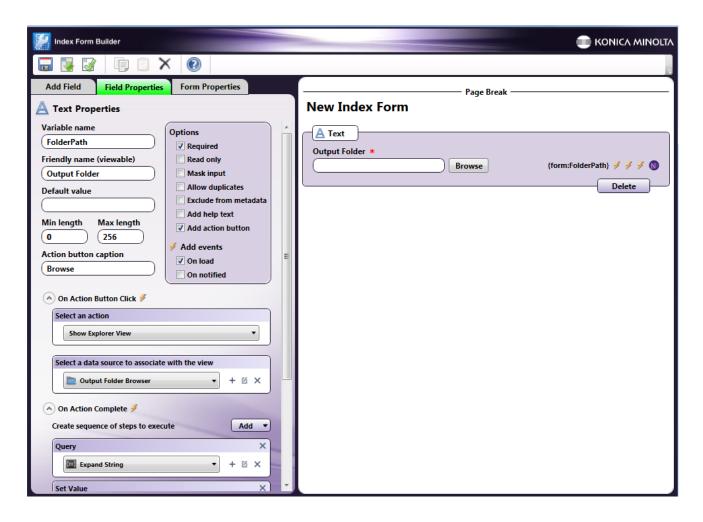
Requirement: Dispatcher Phoenix must be installed on a machine that is part of the Active Directory domain.

To get started, do the following:

- 1. Check whether Active Directory users are set up with Roaming Profiles or Home Folders:
 - · Active Directory users with Roaming Profiles can log onto any computer on the Active Directory domain and access their profile.
 - · Home Folders are private network locations where users can store their files.
- 2. Create a "Scan to Home" workflow with a MFP Panel node and Output Folder.

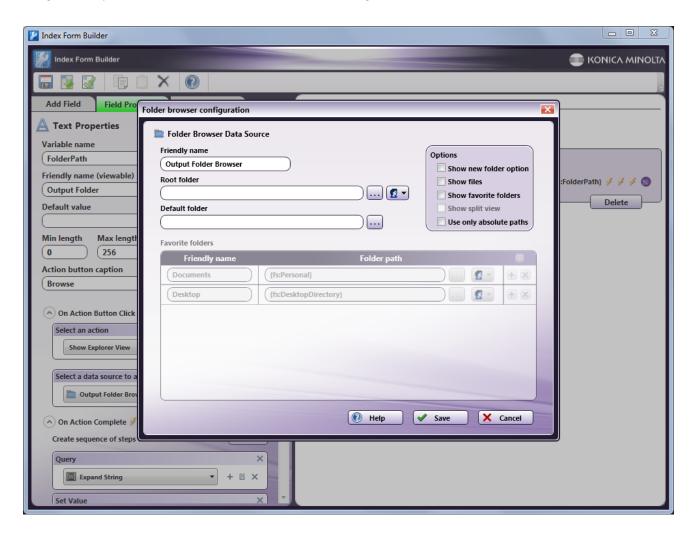


3. Add an Index Form to the MFP Panel node and set up the Index Form for folder browsing.



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4. Configure the Output Folder Browser data source in the Folder Browser Configuration window:



- 5. In the Root Folder field, you will use variables that will automatically expand when the workflow runs.
 - If using a Roaming Profile, enter {user:profile}
 - If not using a Roaming Profile, enter {user:home}.

If not using a Roaming Profile, you must make use of existing variables to construct a path that will work for numerous users. As examples:

\\ad-server\Profiles\{user:home}\Desktop

{user:home}\Scans

Note: In older environments, when a user's home folder is shared via Active Directory and has been accessed by multiple operating systems, a v1, v2, v3, etc. will be added to the profile folder to isolate the profile from profiles created by previous operating systems.

For Windows 7 and Windows Server 2008, their profiles will be stored on the server with a .V2 added after the username, as follows:

\\%server\%\%share\\%Profiles\\%User\%.v2\

For Windows 8 and Windows 2012, contact your IT administrator.

- 6. Save and close the Folder Browser Configuration window, Index Form builder, MFP Panel node and Workflow Builder tool.
- 7. In the main application screen, share the workflow by clicking on the **Shared Status** icon on the tool bar. The workflow should have a Shared Status icon next to it in the Workflow List, as in the following illustration:

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8. Using the MFP Registration Tool, make sure that the MFP's authentication options are set to option 1("Prompt for username and password").



- 9. Run the workflow.
- 10. At the MFP, log into Dispatcher Phoenix with your Active Directory credentials (i.e., username@domain name or domain name / username).

Workflow Services Manager

The Workflow Services Manager allows you to do the following:

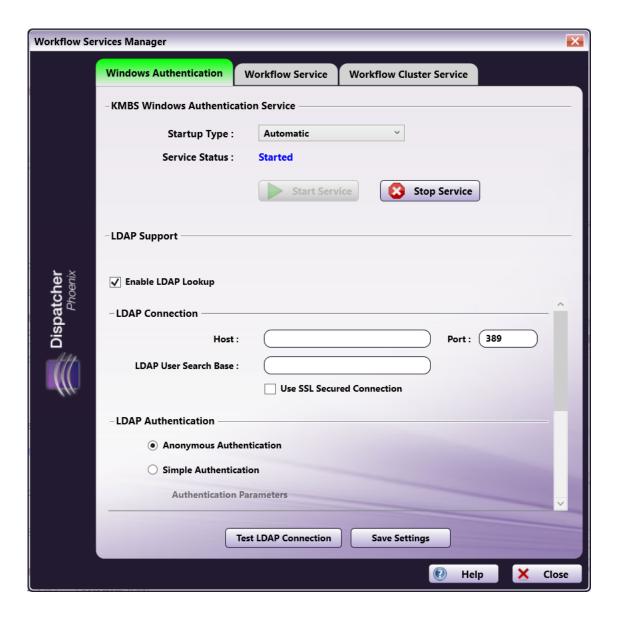
- Manage Workflow Services.
- Configure LDAP support for CAC/PIV authentication.

This application can be accessed from the Windows Start Menu (All Programs > Konica Minolta). You can also perform a Windows search on "Workflow Services Manager" to find this application.

The Workflow Services Manager includes the following key features:

Windows Authentication

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On this tab, an administrator can manage the KMBS Windows Authentication Service by doing the following:

- 1. From the Startup Type pull-down list, specify how/when the KMBS Windows Authentication Service should start. Options are:
 - **Automatic (Delayed Start)** The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
 - **Disabled** The user is prevented from starting the service at any point.
- 2. Activate the service by selecting the **Start Service** button.
- 3. Stop the service by selecting the **Stop Service** button.
- 4. Enable support for LDAP (Lightweight Directory Access Protocol) by checking the **Enable LDAP Lookup** box. LDAP is a standard for user authentication and storage of user profile data. Dispatcher Phoenix must connect to LDAP to perform read-only queries to determine user attributes (for scanning to home directories {user:home} and email addresses {user:email}, etc.) Once enabled, connection, authentication, and search options must be entered to match the LDAP server, as follows:
 - Host Enter the name of the server where the Active Directory (AD) server is hosted.
 - Port Enter the AD server port.
 - LDAP User Search Base Enter your search starting point in the LDAP server tree structure.
 - $\circ~$ Use SSL Secured Connection - Enable SSL connections to the LDAP server.

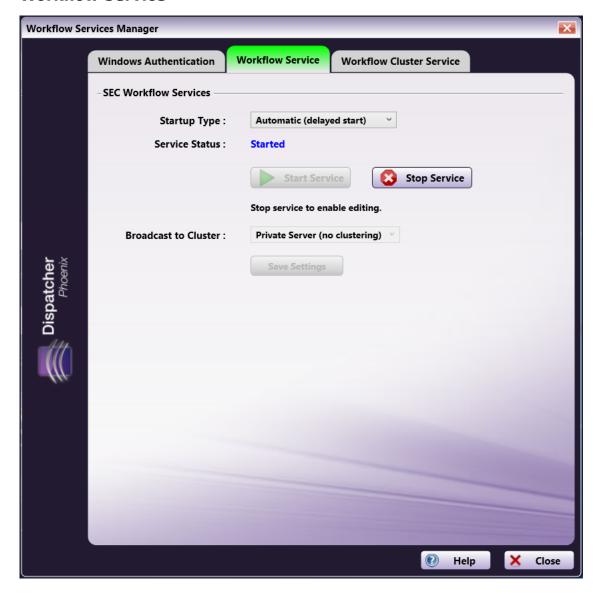
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- **Simple** or **Anonymous Authentication** Specify the type of LDAP authentication (Anonymous, which specifies that the connection should be made without passing credentials, or Simple, which specifies that basic authentication should be used on the connection).
- **Bind DN** Enter the user on the external AD server permitted to search the LDAP directory within the defined search base. Note that the {user}@{domain} variables will be replaced with information coming from the MFP and are necessary to perform the search.
- Password Enter the bind password.
- Filter Enables you to define a search criterion to identify entries in a search requests. For example, (objectClass=person) is used for retrieving sub-sets of users across your LDAP directory.
- Default Search Configure the search attributes.
- Fallback Search Enter additional search strings.
- 5. Test the search setting by selecting the **Test LDAP Connection** button.
- 6. Update the Windows Authentication Service by selecting the **Save Settings** button.

Notes:

- · LDAP changes will not take effect until the KMBS Windows Authentication Service is stopped and started again.
- When a user first logs into Dispatcher Phoenix at the MFP, Active Directory and LDAP information is cached until the user logs out of Dispatcher Phoenix (by exiting the app on the MFP). The next time the user logs in, LDAP information will be obtained again from the Active Directory and/or LDAP.

Workflow Service

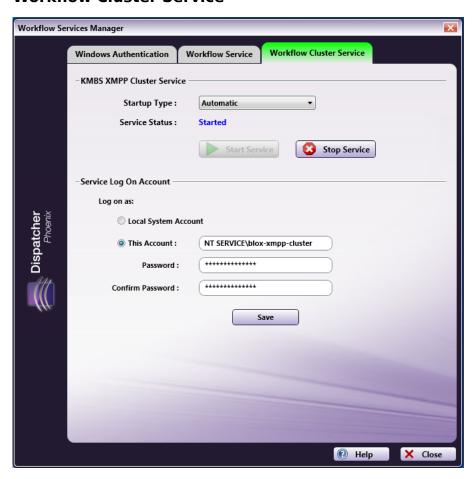


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On this tab, an administrator can manage the SEC Workflow Services by doing the following:

- 1. From the Startup Type pull-down list, specify how/when the SEC Workflow Services should start. Options are:
 - Automatic (Delayed Start) The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.
 - Disabled The user is prevented from starting the service at any point.
- 2. Activate the service by selecting the **Start Service** button.
- 3. Stop the service by selecting the **Stop Service** button.
- 4. Select whether or not to Broadcast to Cluster. This setting enables your server to be public so that they are accessible for cluster set up.

Workflow Cluster Service



On this tab, an administrator can manage the KMBS Workflow XMPP Cluster Service, one of the main workflow services that IT administrators can configure to run as an NT Service virtual account for CAC/PIV authentication and other security purposes. Virtual accounts are "managed local accounts" that provide the following features to simplify service administration:

- · No password management is required.
- The ability to access network destinations (e.g., network shares, home folders, etc.) with a computer identity in a domain environment.

Do the following:

- 1. From the **Startup Type** pull-down list, specify how/when the XMPP Cluster Service s should start. Options are:
 - **Automatic (Delayed Start)** The service starts shortly after all other services designated as Automatic have been started (typically 1-2 minutes after the system boots).
 - $\circ~$ Automatic The service starts when the system first starts.
 - Manual In order to start the service, the user must the Start Service button on this window every time the PC starts.

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- **Disabled** The user is prevented from starting the service at any point.
- 2. Activate the service by selecting the **Start Service** button.
- 3. Stop the service by selecting the **Stop Service** button.
- 4. Modify **the Log on** type of the service:
 - Select the Local System Account radio button if you do not want to run on a domain.
 - Select the This Account radio button and specify the NT virtual service account and password to have full permissions to write to the domain server.

Note: Service Log On Account changes will not take effect until the Workflow Cluster Service is stopped and started again.

Scan To Home with LDAP Lookup using Windows NT Service Logon

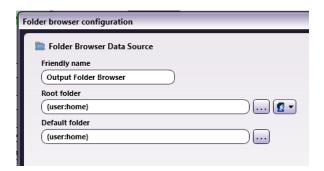
To configure a "Scan to Home" workflow with LDAP lookup using Windows NT Service Logon*, do the following:

These instructions assume that a Windows NT Virtual Service account with access and full permissions to all users' home and profile paths has already been created and that the computer is joined to a domain.

- 1. Launch the Workflow Services Manager application.
- 2. On the Workflow Cluster Service tab, change the Service Log On information to use the Windows NT Virtual Service account.
- 3. Select the **Stop Service** button; then select the **Start Service** button.
- 4. On the Windows Authentication tab, check the Enable LDAP Lookup button.
- 5. Enter LDAP configuration details in the provided fields.
- 6. Select the Save Settings button.
- 7. Select the **Stop Service** button; then select the **Start Service** button.
- 8. In the Dispatcher Phoenix main application, open the MFP Registration Tool. Edit the MFP that you want to use; then select the Authentication tab.
- 9. Choose the single sign on option in the Authentication tab, as in the following illustration:



10. When setting up the Index Form in your workflow for folder browsing, use the {user:home} variable, as in the following illustration:



11. Network credentials are not necessary. Clear any network credentials by clicking on the **Network Credentials** icon; then selecting the **Clear Network Credentials** option, as in the following illustration:



12. On the Dispatcher Phoenix main application screen, ensure that the workflow is shared.

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13. At the MFP, log in with your domain user account.

Dispatcher Phoenix FAQ

- 1. What are the differences between the Dispatcher Phoenix packages?
- 2. What are the differences between the Forms Processing, Advanced OCR, Convert to PDF, and Convert to Office nodes?
- 3. Does Dispatcher Phoenix have an MFP Simulator?
- 4. Is the iOption necessary to run Dispatcher Phoenix workflows on the MFP?
- 5. What is necessary to run Dispatcher Phoenix on a production print model?
- 6. What is an Active Input?
- 7. Can Dispatcher Phoenix create folders dynamically?
- 8. Are there limits to the number of nodes that can be included in one workflow?
- 9. Can workflows be drawn over multiple pages?
- 10. Can Dispatcher Phoenix be installed and used in a Federal Information Processing Standards (FIPS) 140-2 compliant environment?
- 11. Google has deprecated the Google Cloud Print service. What will happen to Dispatcher Phoenix workflows containing the Google Cloud Print node?

1. What are the differences between the various Dispatcher Phoenix packages?

All **Dispatcher Phoenix** packages include:

- Same base application featuring graphical Workflow Builder, advanced Workflow Scheduler, and LiveFlo technology
- Native and advanced bizhub Office MFP control panel integration
- Flexible MFP user options and shared workflow capabilities
- · Document indexing and folder browsing features at the MFP panel

Dispatcher Phoenix

The base license includes the following benefits:

- Easy-to-use, scalable, and cost-effective solution
- Modular architecture for easy expandability with optional add-in nodes such as Barcode Processing, Advanced OCR, OnBase Connector, etc.
- · Document imaging, routing, and printing processes, such as Annotation, Watermark, Rename, Deskew, and Despeckle

Dispatcher Phoenix ScanTrip

Dispatcher Phoenix ScanTrip is a stripped-down version of Dispatcher Phoenix that provides a simple, low-cost scan-to-cloud solution.

Dispatcher Phoenix Release2Me+

Dispatcher Phoenix Release2Me+ is a lean, economical alternative to full-featured print management solutions you can use for secure printing and scanning. This convenient, secure print solution protects the confidentiality of your business documents and reduces unwanted, unnecessary printing.

Vertical Market Packages

If you purchase the Dispatcher Phoenix base license, you can add one or more of the following optional vertical-market packages:

- · Dispatcher Phoenix Office
- · Dispatcher Phoenix Legal
- Dispatcher Phoenix Government
- Dispatcher Phoenix Healthcare
- Dispatcher Phoenix Education
- Dispatcher Phoenix Finance
- Dispatcher Phoenix ECM

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2. What are the differences between the Forms Processing, Advanced OCR, Convert to PDF, and Convert to Office nodes?

- Forms Processing Performs advanced searching for unique identifiers (e.g., Social Security numbers, telephone numbers, etc.) via barcode or text searches. Information can be extracted and/or processed (redact, highlight, or strikeout) based on user-defined rules. This node is useful any time you need to extract or process information in a document without knowing its exact content (or even its exact position on the page).
- Advanced OCR Performs page-level and zonal OCR on image files (TIFF, JPG, PNG, BMP) and PDFs to extract metadata to be used for splitting, renaming, or routing documents. The node can also be used to convert files to a variety of different formats:
 - PDF
 - PDF Searchable
 - · PDF with Image Substitutes
 - Microsoft Word 2000, XP
 - Microsoft Word 97
 - Microsoft Word 2003
 - Microsoft Word Excel 2003, XP
 - Microsoft Word Excel 97
 - Microsoft PowerPoint 97
 - XPS Searchable
 - o RTF Word 2000
 - RTF 2000 Exact Word
 - RTF Word 97
 - o RTF Word 6.0/95
 - Text
 - · Comma Separated Text
 - Formatted Text
 - Text with line breaks
 - Unicode Text
 - Unicode Comma Separated Text
 - Unicode Formatted Text
 - Unicode Text with line breaks
 - XML
 - eBook

Note: For Microsoft Office conversion with basic conversion to PDF Searchable, the Advanced OCR node can be the most cost-effective solution.

- Convert to PDF Converts image files and existing PDFs to a wide variety of PDF formats :
 - PDF
 - PDF Searchable Image
 - PDF with Image Substitutes
 - PDF Edited
 - PDF Image Only
 - Advanced settings include:
 - Security passwords
 - $\, \blacksquare \,$ Optimize for file size, quality, specific PDF version, and PDF/A
 - Automatic page rotation
 - Blank page removal
- Convert to Office Converts image files and PDFs to the latest Microsoft Office formats:
 - Microsoft Word 2007/ 2010 (docx)

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- Microsoft Word 2000, XP (doc)
- Microsoft Word 97 (doc)
- Microsoft Word 2003 (doc)
- Microsoft Excel 2007, 2010 (xlsx)
- Microsoft Word Excel 2003, XP (xls)
- Microsoft Word Excel 97 (xls)
- Microsoft PowerPoint 2007, 2010 (pptx)
- Microsoft PowerPoint 97 (ppt)
- XPS
- XPS Searchable
- o RTF Word 2000
- RTF 2000 Exact Word
- RTF Word 97
- RTF Word 6.0/95
- WordPad
- WordPerfect (9,10)
- Microsoft Infopath
- Microsoft Publisher 98
- Microsoft Reader

3. Is an MFP Simulator available for Dispatcher Phoenix?

The Dispatcher Phoenix MFP Simulator allows you to demo how easy it is to use the application on the MFP – without needing either a physical MFP or the Dispatcher Phoenix application.

The MFP Simulator is available as:

- · A stand-alone, PC-based Simulator
- An online, web-based Simulator to be used on PC browsers, iPhones, iPads, Android devices, and other mobile devices
- An integrated Simulator

Stand-alone and Online Simulators

Both the stand-alone and online Simulators give customers a view of the application's "look and feel" on the MFP without requiring either Dispatcher Phoenix or an MFP to run. They include built-in, canned workflows that do not require in-depth knowledge to demonstrate.

Download the stand-alone Simulator from the SEC Website.

Access the online Simulator by clicking here.

Integrated Simulator

Included in all versions of Dispatcher Phoenix, the integrated Simulator allows you to interactively run any Dispatcher Phoenix workflow – without needing to connect to a physical MFP. You can submit files directly into a Dispatcher Phoenix workflow from the simulated MFP panel and those files will be processed, real-time, in Dispatcher Phoenix.

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4. Is the iOption necessary to run Dispatcher Phoenix workflows on the MFP?

The iOption is not required on an MFP in order to run Dispatcher Phoenix. If the iOption is installed, Dispatcher Phoenix bEST (bizhub Extended Solution Technology) workflows can be displayed graphically with oversized buttons and thumbnail images of available workflows. However, support for the MFP's native interface, which displays workflows in a text-based manner, is provided as well.

DISPATCHER PHOENIX - NATIVE USER INTERFACE





DISPATCHER PHOENIX - GRAPHICAL USER INTERFACE





In order to add the iOption to an MFP, you will need to order the LK-101 kit appropriate for your MFP model. In addition, your MFP may require a memory upgrade.

5. What is necessary to run Dispatcher Phoenix on a production print model?

To run Dispatcher Phoenix workflows on a production print model, refer to the Setting Up Production Print page.

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You can also find the Dispatcher Phoenix Production Print Set Up Guide on the SEC website.

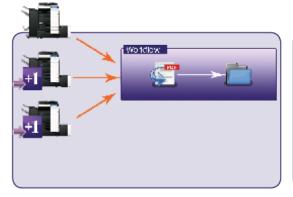
6. What is an active input?

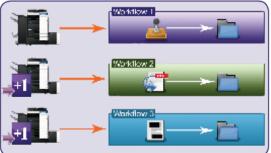
An active input is any entry point into a workflow that is running or scheduled to run. A workflow can have multiple active inputs. Inputs in Dispatcher Phoenix can be:

- Input Folder (Collects files from local or network folders)
- MFP User Box (Collects files from MFP User Boxes)
- MFP Panel (Receives files scanned from an MFP using bEST technology)
- LPR In (Receives files from LPR Print Drivers)
- SMTP In (Receives files scanned as email from an MFP)
- Google Cloud Printer (Receives Google Cloud print jobs)
- Dispatcher Phoenix Mobile (Receives files from mobile devices)
- Dispatcher Phoenix Workstation (Receives files from Dispatcher Phoenix Workstation)

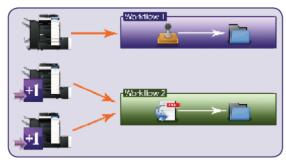
1 WORKFLOW COLLECTING FROM 3 MFPS:

3 WORKFLOWS COLLECTING FROM 1 MFP EACH:





2 WORKFLOWS COLLECTING FROM 3 MFPS:



7. Can Dispatcher Phoenix create folders dynamically?

Using Dispatcher Phoenix, new folders can be created dynamically based on the path provided in the workflow and a variety of variables, such as file name, date/time, and logged-in user name, etc.

Dispatcher Phoenix also provides the ability to dynamically create output directories based on file content. With the Advanced OCR node, you can create zones around specific data that you want to capture in your document. That extracted information can then be referenced when defining an output folder, using the following syntax:

{ocr:zone.name of zone[page number]}

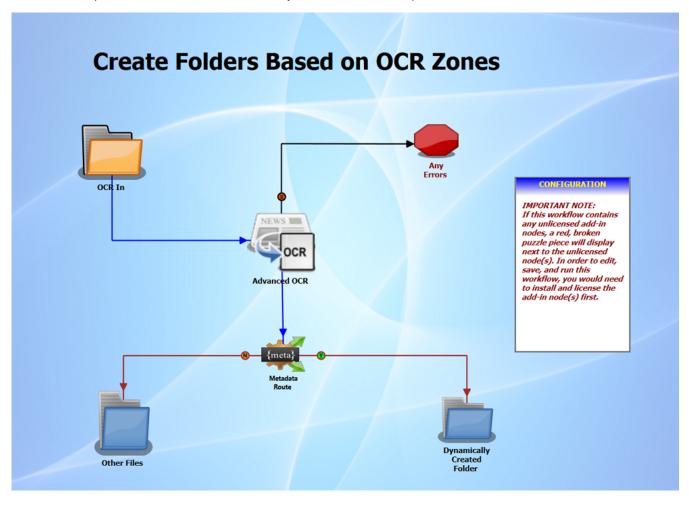
For example, if you have created a zone called 'client' on page one of your document, you could specify the following when defining an output folder:

{fs:DesktopDirectory} {ocr:zone.client[1]}

In this example, if the value of the 'client' zone is John Doe, then a John Doe output folder on your Desktop will be automatically created.

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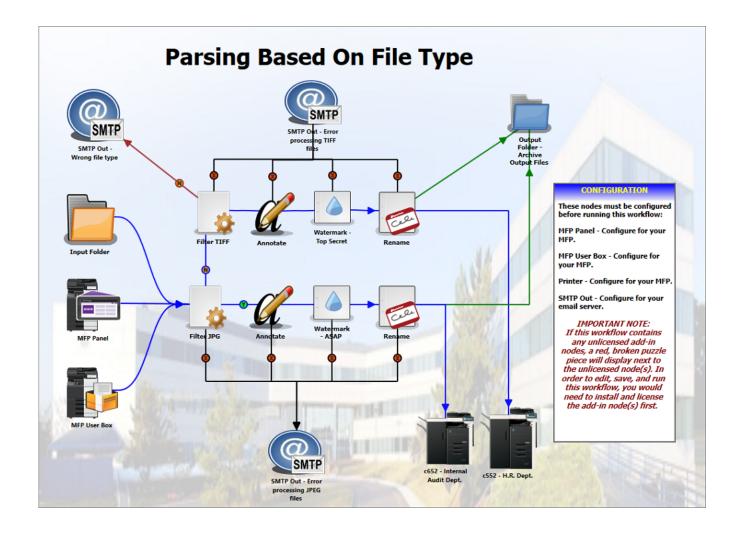
A sample workflow, including sample files, has been created to demonstrate this functionality. On Dispatcher Phoenix's main application screen, click on the Online Samples icon on the tool bar to download the Dynamic Folder Creation sample workflow.



8. Are there limits to the number of nodes that can be included in one workflow?

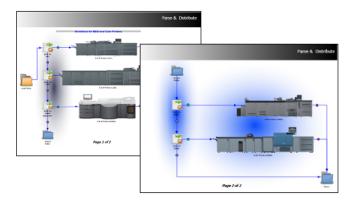
There are no limits to the amount of nodes that can be included in a workflow. You can include multiple input nodes (for file collection), process nodes, and distribution nodes (for file distribution) to suit your business needs.

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9. Can workflows be drawn over multiple pages?

If you need to create a complex process with a large amount of nodes, you can insert an unlimited number of additional pages to your workflow. Multiple elements in a workflow can be copied and pasted from page to page, which is the equivalent of using a connector between two nodes on the same page.



10. Can Dispatcher Phoenix be installed and used in a Federal Information Processing Standards (FIPS) 140-2 compliant environment?

Yes. Dispatcher Phoenix can be used in a FIPS 140-2 compliant environment including within non-military federal government agencies and by government contractors where well-designed security standards are essential.

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11. Google has deprecated the Google Cloud Print service. What will happen to Dispatcher Phoenix workflows containing the Google Cloud Print node?

As of January 1, 2021, Google has deprecated the Google Cloud Print service. As such, all Dispatcher Phoenix workflows that currently contain the Google Cloud Print node will no longer be functional. If you update Dispatcher Phoenix to the current version, all Google Cloud Print nodes in workflows will be replaced with a red, broken puzzle piece, indicating that these nodes can no longer be used. If you choose to not update to the current version, the nodes will appear unchanged in your workflows, but will not be functional.

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Glossary

Dispatcher Phoenix

Word	Definition
Active Input	An input is any entry point into a workflow (Input Folder, MFP User Box, MFP Panel, LPR In, SMTP In, etc.) and is considered active when the workflow is running or is scheduled to run. MFPs used within Release2Me workflows are also considered active inputs.
AD	Active Directory (AD) is a Microsoft product that consists of several services that run on Windows Server to manage permissions and access to networked resources.
Add-In Manager	This tool is used to view, download, install, or uninstall updates to Dispatcher Phoenix applications.

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Word	Definition					
Add-In Modules	A set of features, functions, or nodes that expand or enhance your existing Dispatcher Phoenix installation.					
ADF	Automated Document Feeder (ADF) used on scanners and MFPs to feed pages into the machine so that multiple pages can be scanned at one time, eliminating the need to scan a document one page at a time.					
Advanced Routing	Dispatcher Phoenix processing including routing by email, the page count, or color content of the document.					
Automatic Web Registration and Activation	The process of registering and activating your Dispatcher Phoenix installation with a Solutions Engineering Center (SEC) website login, password, and purchase code.					
bEST	This stands for bizhub Extended Solution Technology (bEST) and it enables seamless integration between Konica Minolta MFPs and software applications residing on a PC or server. Those software applications (for print management, cost control, document workflow, etc.) can be accessed directly from the device panel.					
Bubble Grader	A grading and assessment solution for educators and administrators in K-12 as well as colleges and universities.					
Canvas Properties	The settings and customization options for the background or "canvas" of the workflow.					
Collection Node	The starting node that collects files (e.g. Input Folder, MFP Panel, etc.) for further processing/distribution of a Dispatcher Phoenix workflow.					
Connector (Node)	A type of distribution or output node that allows Dispatcher Phoenix to route files to a third party applications (e.g. OnBase Connector, Google Drive Connector, etc.).					
Connector (Workflow Builder)	A pathway between two nodes. Connectors can include Standard, Yes, No, and/or Error transitions and illustrate the direction a document will travel through the workflow.					
Default Error Node	A customization setting in the Canvas Properties that automatically collects documents that error out of a workflow without using a separate error transition.					
Distribution Node	The ending node of a workflow path that distributes files to an output (e.g. Output Folder, Printer, etc.).					
Document Indexing	The process of associating data or search terms to a document in order to facilitate search and document retrieval.					
Document Management Systems	Applications that enable organizations/businesses to manage their documents in electronic format, storing these documents for subsequent search and retrieval.					
Document Manipulation	Dispatcher Phoenix's custom file editing tools including Advanced Bates Stamp, Redact, Highlight, Annotate, and more.					
File Parsing	Parsing is a process performed on files based on pre-defined rules. A Parser Rule is a process within a workflow that performs a Search For, Distribute, Insert, or Replace operation, based on the conditions you define.					
Flatbed Scanner	A scanner where the document is placed on platen glass for scanning.					
FTP	File Transfer Protocol (FTP) is a standard Internet protocol for transmitting files between computers on the Internet over Transmission Control Protocol (TCP)/Internet Protocol (IP) connections.					
Graphical Workflow Builder	The highly intuitive, drag-and-drop tool for creating Dispatcher Phoenix workflows.					
НТТР	Hypertext Transfer Protocol (HTTP) is the communications protocol used to connect to Web servers on the Internet or on a local network (Intranet). Its primary function is to establish a connection with the server and send resources such as Hypertext Markup Language (HTML) pages back to the user's browser.					
Icon (Node)	The image associated with the node that can be customized for each workflow to suit your needs. Users can upload custom icons to suit each node in their workflow.					
Image Processing	The analysis and manipulation of a digitized image, especially in order to improve its quality. Dispatcher Phoenix image processing tasks include despeckle, deskew, mirror image, negative image, rename, and watermark.					
IFB	Dispatcher Phoenix's Index Form Builder (IFB) allows end-users to create custom displays for the MFP for document indexing, processing, and folder browsing.					
LDAP	Lightweight Directory Access Protocol (LDAP) enables you to locate organizations, individuals, and other resources such as files and devices on a network, whether on the public Internet or on a corporate Intranet.					

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Word	Definition					
License File	A package downloaded from the SEC website that allows you to manually register or update the Dispatcher Phoenix Software.					
LiveFlo	Real-time workflow animations that allow you to view where your documents are in a workflow.					
Manual Registration	The activation of Dispatcher Phoenix software or add-in(s) by visiting the SEC website and entering your Purchase Code and Lock Code or Unlock Code.					
Metadata	A set of data that describes and gives information about files or node settings that can be used for additional document processing tasks or saved in a separate file.					
MFP	A multi-function peripheral (MFP) is a device that performs a variety of functions that would otherwise be carried out by separate peripheral devices. As a rule, it includes at least two of the following: a printer, a scanner, and/or a copier.					
MFP Registration Tool	The management interface for searching, finding, and registering devices.					
MFP Simulator	A tool that simulates Dispatcher Phoenix workflows on the MFP without requiring a connection to a physical MFP.					
Node (Workflow)	A piece or a specific process of a workflow. Nodes include collection, process and distribution activities.					
Node Properties	The settings and customization options for a node.					
OCR	Optical Character Recognition (OCR) is technology that transforms text in image formats into editable and searchable text, enabling file conversion and intelligent routing.					
ODBC	Open Database Connectivity (ODBC) is a standard Application Programming Interface (API) for accessing databases.					
Patch Code	A patch code is a pattern of parallel, alternating black bars, and spaces (a barcode), developed for use in automated scanning. When scanning the document, the patch code can be recognized and acted upon.					
Process Node	Any document processing or manipulation task (Annotate, Highlight, Redact, Deskew, Despeckle, Merge, Split, etc.) between the Collection Node(s) and the Distribution Node(s) in a Dispatcher Phoenix workflow.					
Purchase Code	The unique ID associated with each license of Dispatcher Phoenix. This code is used to activate, register, or deactivate Dispatcher Phoenix or an Add-In Module.					
Registered MFP	An MFP that is configured for use in a bEST workflow.					
Release2Me	A simple, convenient, and secure print release system unique to Dispatcher Phoenix.					
Schedule Workflow	The process of setting up the workflow to run at a specific interval. Users have the ability to choose for a workflow to run only during a specified date range or to run the workflow indefinitely. Furthermore, a workflow can be scheduled to run on a particular day and time of the week. The scheduler can be run as a service or an application.					
Selected MFP	The MFP currently selected for configuration, registration, deletion, or use in a workflow.					
SMB	Server Message Block (SMB) is a network protocol used by mostly Windows-based computers that allows systems within the same network to share files, printers, serial ports and other resources.					
SMTP	Simple Mail Transfer Protocol (SMTP) is a protocol used in sending and receiving e-mail. Users typically use a program that uses SMTP for sending e-mail and either Post Office Protocol 3 (POP3) or Internet Message Access Protocol (IMAP) for receiving e-mail.					
Toggle Shared Status	An icon on the main application Tool Bar that, when turned on, shares the workflow. This allows any user who has access to the computer to use the running workflow and, when off, is no longer shared to other users who have access to the computer.					
Transition	The action of a file moving from one process to another. There can be more than one transition out of a single process/node in a workflow.					
Unlock Code	This is a represents the system that Dispatcher is installed on and is not generated until the software is installed. The unlock code is used in the event you need to transfer a Dispatcher Phoenix license.					
Validate	A process that checks the accuracy of your workflow or index form to ensure all of the fields and settings needed to run the workflow are accounted for.					
WebDAV	Web-based Distributed Authoring and Versioning (WebDAV) allows users to collaboratively edit and manage files on remote web servers. WebDAV is a protocol that is an extension of the Hypertext Transfer Protocol.					
Workflow Services	The background task that enables Dispatcher Phoenix to automate your document processing workflows.					

Dispatcher Phoenix Web

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Word	Definition					
Active Node	The cluster server that currently owns cluster group resources and responds to network requests made to those services.					
Batch	A group of documents that are processed in a scan operation.					
Batch Indexing	An indexing process for a large volume of documents.					
Batch Processing	Processing a large volume of documents, generally into a few files or one file, using an intelligent capture software application to process the scanned or captured file(s).					
Batch Scanning	A scanning process for a large volume of documents.					
Bubble Sheet Generator	A time-saving tool for educators to create and manage Bubble Sheet tests and templates.					
Card Registration	An admin tool used to register user ID cards (e.g., HID Proximity, iCLASS and MIFARE etc.) with an organization's Directory Server. Once the card is registered, the card can be used at MFPs and provide Single Sign-On user authentication to Dispatcher Phoenix.					
Cluster	A group of two or more replicated servers (also known as "nodes") that are deployed to increase the availability, reliability, and/or performance of the group over that provided by a single server. Once joined together in a cluster, the nodes remain in constant communication.					
Document Separation	The process of dividing images/files in the batch into documents. Dispatcher Phoenix Workstation supports the following document separation methods: Page Count, Blank Page, Barcode, Patch Code, or None (creates a single document).					
Failover	The process of moving resources from one server to another in the case of failure. Using an Active/Passive configuration, a passive server remains in standby mode, waiting for the active server to fail. If the primary server becomes unavailable because of failure or maintenance, the passive server immediately takes control of the cluster resources and services. Failover occurrs within a failover cluster.					
Failover Cluster	A cluster designed to provide failover services (if a failure occurs on the primary member of the cluster, the primary server's resources will automatically restart on another server that is also a member of the cluster).					
Heartbeat	A network "packet" sent at a regular interval between nodes in the cluster to confirm that they are still online.					
Load Balancing	Distributes the processing and traffic evenly across all servers in a cluster, or server "farm".					
Offload Server	A server designed to collect and complete labor-intensive tasks, such as OCR, in order to increase the efficiency of the primary server.					
Node (Enterprise)	A server that is part of a cluster.					
Passive Node	The cluster server that does not currently own cluster group resources but is available if the active node fails.					
Sharing	The ability to manage access to workflows in Dispatcher Phoenix Web for specific users and/or user groups.					
TWAIN	Scanning protocol connecting scanners with applications on personal computers.					
Verification	The process of verifying documents for quality assurance purposes prior to routing to long-term storage.					
Workstation	A dedicated scan station that supports any manufacturer's high-speed TWAIN scanning devices. The Workstation application allows a user to auto-separate documents by number of pages, blank pages, barcodes, or patch codes in a real-time display. Workstation provides pre and post-scan options that allow scan operators to reorganize scanned documents and manipulate pages (reorder, rotate, flip, rescan, insert, etc.) using drag-and-drop functionality.					

Job Ticket Metadata Information

Click on the **Metadata Key** selection button to launch the Metadata Browser window. The window displays the pre-defined Job Ticket Metadata, system-defined variables (such as Date, File, System, and User info), and the metadata values from the active node.

The Metadata Browser includes the following functionality:

• Expand the List: click the plus (+) sign next to the metadata to expand the view. The following list opens:

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- Collapse the List: Click the minus sign (-) next to the metadata and the list is collapsed.
- Choose metadata: To add a new editable Metadata value, click on the metadata, and then click the Select button.
- Custom Metadata: To add a custom metadata reference, click on the Custom Metadata checkbox then enter the correct syntax in the empty field.
- Search for Metadata: In the Search field on the right-side of the menu, enter a text string. The Metadata Browser searches for the value.
- Specifying Page-Level Metadata: The metadata for a specific page must be enclosed in square brackets ([]). For example: {job:paper.width[]}

Job Ticket Metadata

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
Job Settings	Job Ticket Number	The Job Ticket Number created and assigned by the Job ticket table.	{job:ID}	Symbol, space, or alphanumeric characters allowed	/JDF/@kmbs:Connect
	Job Ticket Name	The Name of the job.	{job:name}	Symbol, space, or alphanumeric characters allowed	/JDF/CustomerInfo/@
	Job Priority	The Priority of the job.	{job:priority}	NormalRush	/JDF/NodeInfo/@JobPi
	Due Date	The Due Date of the job.	{job:duedate}	The print job's due date is noted using the following format: YYYY'-'MM'-'dd'T'HH':'mm':'ss (*). (*) indicates time zone. Example: 2017-02- 13T13:03:30+05:30	/JDF/NodeInfo/@LastI

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Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	Color Mode	The Color Mode of the job.	{job:colormode}	ColorBWMixed	/JDF/ResourcePool/Cc
	High Quality Color	The High-Quality Color mode of the job.	{job:colormode.hq}	• ON • OFF	/JDF/ResourcePool/Cc
	Job Description	The Description of the job.	{job:description}	Symbol, space, or alphanumeric characters allowed	/JDF/Comment
Basic Settings	Copies	The Copy count of the job.	{job:copy}	1-99999	/JDF/ResourceLinkPoo
	Collate	When multiple copies of a document are printed, one entire copy of the document is printed at a time.	{job:collate}	• ON • OFF	/JDF/ResourcePool/Di
	Offset	The Offset setting of the job. See ¹ for limitation details.	{job:offset}	• ON • OFF	/JDF/ResourcePool/Di
	Offset Copies	The number of Copies in an Offset set. See ¹ for limitation details.	{job:offset.copy}	1-99999	/JDF/ResourcePool/Di
	Offset Pages	The number of Pages in an Offset set. See ¹ for limitation details.	{job:offset.pages}	1-65535	/JDF/ResourcePool/Di
	Paper Catalog ID	The ID of an item in the Paper Catalog (Paper Catalog entries usually include predefined job ticket attributes like Paper Size, Type, Color, and Weight).	{job:paper.catalogID}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/Me
	Paper Name	The Paper Name assigned to a value stored in a Paper Catalog (Paper Catalog entries usually include predefined job ticket attributes like Paper Size, Type, Color, and Weight).	{job:paper.name}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/Me

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Paper Source The Paper {job:paper.source} • Auto Source for the job. • Tray1 in Tray2 Tray3 Tray4 Tray5 Tray6	/JDF/ResourcePool/Me
 Tray8 Tray9 Tray10 Tray11 Tray12 Manual 	
Paper Weight The Paper Weight of the Job in g/m2. 40 40 40 40 50 62 72 92 131 162 210 245 300 400 400	JDF/ResourcePool/Me
Paper Type The Paper Type {job:paper.type} Plain of the job. Custom Value: The user-defined value	/JDF/ResourcePool/Me
CoatedA	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
CoatedB	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
Fine	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
Book	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
Embossed	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
Embossed2	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
USER	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
BlankInsert	/JDF/ResourcePool/Me
Transparence	cy /JDF/ResourcePool/Me
Thick1	/JDF/ResourcePool/Me
Thick2	/JDF/ResourcePool/Me
Thin	/JDF/ResourcePool/Me
Recycled	/JDF/ResourcePool/Me
ExclusiveA	/JDF/ResourcePool/Me
ExclusiveB	/JDF/ResourcePool/Me
ExclusiveC	/JDF/ResourcePool/Me
ExclusiveD	/JDF/ResourcePool/Me
ExclusiveE	/JDF/ResourcePool/Me

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Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
				ExclusiveF	/JDF/ResourcePool/Me
				ExclusiveG	/JDF/ResourcePool/Me
				ExclusiveH	/JDF/ResourcePool/Me
				Exclusivel	/JDF/ResourcePool/Me
				ExclusiveJ	/JDF/ResourcePool/Me
				ExclusiveK	/JDF/ResourcePool/Me
				ExclusiveL	/JDF/ResourcePool/Me
				ExclusiveM	/JDF/ResourcePool/Me
				Seal	/JDF/ResourcePool/Me
				Trace	/JDF/ResourcePool/Me
				ColorSpecific	/JDF/ResourcePool/Me
				HighQuality	/JDF/ResourcePool/Me
				CoatedGlossLaser	/JDF/ResourcePool/Me
				CoatedGlossOffset	/JDF/ResourcePool/Me
				CoatedMatteLaser	/JDF/ResourcePool/Me
				CoatedMatteOffset	/JDF/ResourcePool/Me
				Envelope	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
				PrePrinted	/JDF/ResourcePool/Me
				Custom Value	/JDF/ResourcePool/Me
	Paper Color	The Paper Color of the job. See ² for limitation details. Custom Value: The user defined value	{job:paper.color}	 White ClearWhite Yellow Pink Blue Green Other Goldenrod Gray Ivory Orange Red Cream Custom Value 	JDF/ResourcePool/Me
	Paper User Color	User Defined Paper Color. See ² for limitation details.	{job:paper.usercolor}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/Me /JDF/ResourcePool/Me
	Use Perforated Paper	Use to indicate whether an output tray contains Perforated Paper.	{job:paper.useperforated}	• ON • OFF	/JDF/ResourcePool/Me

Konica Minolta 1508 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	Paper Width	The Paper Width of the job in points. This value is determined by value set for Basic Settings > Paper Unit Example: If Job Ticket has an 8.50(Letter) inch value, then the value is converted into 612 points in metadata.	{job:paper.w}	255.096 - 936	/JDF/ResourcePool/Me
	Paper Height	The Paper Height of the job in points. This value is determined by value set for Basic Settings > Paper Unit Example: If Job Ticket has 11(Letter) inch value, then the value is converted into 792 points in metadata.	{job:paper.h}	374.184 - 3401.568	/JDF/ResourcePool/Me
	Paper Unit	The measurement standard used for Paper Size. See ³ for limitation details.	{job:paper.unit}	inchmmpoint	Not Applicable
	Orientation	The Orientation of the original document.	{job:orientation}	PortraitLandscape	Not Applicable
Layout Settings	Imposition	Imposition (No Reduction) enables printing 2 pages of a document onto a single sheet of paper. This can only be done when the output paper is double the size of the original. For example, two A4 sheets will print on a single A3 sheet.	{job:imposition}	OFF	/JDF/ResourcePool/La
				2ln1	/JDF/ResourcePool/La
				2In1Repeat	/JDF/ResourcePool/La /JDF/ResourcePool/La

Konica Minolta 1509 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
				2In1RepeatReverse1	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
				2In1RepeatReverse2	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
				2In1RepeatReverse3	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
				2In1RepeatReverse4	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
	Printing Type	The print type of the job. One-Sided: Prints on one side of the paper. Double-Sided: Prints on both sides of the paper. Booklet: Prints on both sides of the paper. Gathers the printed pages and folds them in half so they appear in their original order. Adhesive Binding: Prints on both sides of the paper. Folds each sheet in half after printing so the sheets appear in their original page order. Normally, this setting is used in conjunction with the Center Fold Out setting.	{job:printtype}	One-Sided	/JDF/ResourcePool/La
				Double-Sided Booklet	/JDF/ResourcePool/La
				AdhesiveBinding	/JDF/ResourcePool/La /JDF/ResourcePool/Gl

Konica Minolta 1510 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
Cover Settings	Front Cover	Print instructions for the Front Cover of the document. Blank: Nothing is printed on the Front Cover. Print: The first page of the document is printed onto the Front Cover.	{job:frontcover}	Blank	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
				Print	/JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru
	Front Cover Paper Name	The Name of the Paper Catalog value that is used for the Front Cover.	{job:frontcover.paper.name}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/La
	Back Cover	Print instructions for the Back Cover of the document. Blank: Nothing is printed on the Back Cover. Print: The first page of the document is printed onto the Back Cover.	{job:backcover}	Blank	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
				Print	/JDF/ResourcePool/Ru /JDF/ResourcePool/Ru JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru /JDF/ResourcePool/Ru
	Back Cover Paper Name	The Name of the Paper Catalog value that is used for the Back Cover.	{job:backcover.paper.name}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/Ru
Finishing Settings	Binding Position	Specifies the Binding Position for the document.	{job:bind}	LeftTopRight	/JDF/ResourceLinkPoo
	Saddle Stitch	Selects an installed Saddle-Stitcher.	{job:saddlestitch}	• ON • OFF	JDF/ResourcePool/Stil

Konica Minolta 1511 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	Trim	Cuts the edges of Saddle Stitched and Center-Folded paper. This setting is active when Booklet is selected as the Print Type.	{job:trim}	• ON • OFF	/JDF/ResourcePool/Tri
	Staple	The Staple setting for the job. The staple position can be changed with the Binding Position setting. Single Left and Single Right are active when the Binding Position is Top.	{job:staple}	SingleLeft	/JDF/ResourcePool/Sti /JDF/ResourcePool/Sti
				SingleRight	/JDF/ResourcePool/St /JDF/ResourcePool/St
				1	/JDF/ResourcePool/St
				2	/JDF/ResourcePool/St
				Narrow	/JDF/ResourcePool/St /JDF/ResourcePool/St
				Narrow+	/JDF/ResourcePool/St /JDF/ResourcePool/St
	Punch	The number of Punch holes that are applied to the job.	{job:punch}	23410	/JDF/ResourcePool/Hc
	Folding	The Fold setting for the job.	{job:folding}	Z-Fold (A3, B4, 11x17, 8K)	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				Z-Fold (8.5 x 14)	/JDF/ResourcePool/Fo
				CenterFold	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				CenterFoldOut	/JDF/ResourcePool/Fo
				LetterFold	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				LetterFoldOut	/JDF/ResourcePool/Fo
				ZigZag	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				ZigZagOut	/JDF/ResourcePool/Fo
				DoubleParallel	/JDF/ResourcePool/Fo
				DoubleParallelOut	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				GateFold	/JDF/ResourcePool/Fo /JDF/ResourcePool/Re
				GateFoldOut	/JDF/ResourcePool/Fo
				MultiLetterFold	/JDF/ResourcePool/Fo
				MultiLetterFoldOut	/JDF/ResourcePool/Fo
				MultiCenterFold	/JDF/ResourcePool/Fo

Konica Minolta 1512 / 1597

Category Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
Perfect Binding	Perfect Binding settings.	{job:perfectbinding}	• ON • OFF	JDF/ResourcePool/Co
Perfect Binding Mode	The mode applied for Perfect Binding.	{job:perfectbinding.mode}	Blank1ln12ln13ln1	JDF/ResourcePool/Dig
Perfect Binding Tray	The Perfect Binding Tray.	{job:perfectbinding.tray}	 Tray1 Tray2 Tray3 Tray4 Tray5 Tray6 Tray7 Tray8 Tray9 Tray10 Tray11 Tray12 Manual PITray1 PITray2 PI-PFUTray1 PI-PFUTray2 PI-PFUTray3 PBCoverTray 	/JDF/ResourcePool/Di
Perfect Binding Duplex	The Perfect Binding Duplex setting.	{job:perfectbinding.duplex}	• ON • OFF	/JDF/ResourcePool/Di
Perfect Binding Spine	The Perfect Binding Spine value in points. This value is determined by the value set for Basic Settings > Paper Unit. Example: If a Job Ticket has a value of 0.04 inches, then the value is converted to 2.88 points in metadata.	{job:perfectbinding.spine}	2.88 - 84.96	/JDF/ResourcePool/Di
Perfect Binding Cover Width	The Perfect Binding Cover Width in points. This value is determined by the value set for Basic Settings > Paper Unit. Example: If a Job Ticket has a value of 5.47 inches, then the value is converted to 393.84 points in metadata.	{job:perfectbinding.cover.w}	393.84 - 870.48	/JDF/ResourcePool/Di

Konica Minolta 1513 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	Perfect Binding Cover Height	The Perfect Binding Cover Height in points. This value is determined by the value set for Basic Settings > Paper Unit. Example: If a Job Ticket has a value of 10.98 inches, then the value is converted to 790.56 points in metadata.	{job:perfectbinding.cover.h}	790.56 - 1337.76	/JDF/ResourcePool/Di
	Perfect Binding Cover Weight	The Perfect Binding Paper's Cover Weight in g/m2.	{job:perfectbinding.cover.weight}	 40 50 62 72 92 131 162 210 245 300 400 	/JDF/ResourcePool/Di
	Ring Binding	Use to indicate when Ring Binding is active.	{job:ringbinding}	• ON • OFF	/JDF/ResourcePool/Rii
	Ring Binding Front Cover	The Ring Binding Front Cover Side setting.	{job:ringbinding.frontcover}	Outside Inside	/JDF/ResourcePool/Rii
	Ring Binding Back Cover	The Ring Binding Back Cover Side setting.	{job:ringbinding.backcover}	Outside Inside	/JDF/ResourcePool/Rii
Inter Sheet Settings	PPS Print Type	The Print Type of the page exception sheet. One-Sided: Prints on one side of the paper. Double-Sided: Prints on both sides of the paper. Blank: Insert blank sheet. BlankBeforeFirst: Insert blank sheet before first page.	{job:printtype[]}	One-Sided	/JDF/ResourcePool/La
				Double-Sided	/JDF/ResourcePool/La
				Blank	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La

Konica Minolta 1514 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
				BlankBeforeFirst	/JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La /JDF/ResourcePool/La
	PPS Binding	The Binding Positon of the inter sheets sheet.	{job:bind[]}	LeftTopRight	/JDF/ResourceLinkPoo
	PPS Paper Catalog ID	The ID of the item stored in the Paper Catalog (Paper Catalog entries usually include pre-defined job ticket attributes like Paper Size, Type, Color, and Weight).	{job:paper.catalogID[]}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/La
	PPS Paper Name	The Paper Name assigned to a value stored in a Paper Catalog (Paper Catalog entries usually include predefined job ticket attributes like Paper Size, Type, Color, and Weight).	{job:paper.name[]}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/La
	PPS Paper Source	The paper source of the inter sheet.	{job:paper.source[]}	• SameAsBody • Tray1 • Tray2 • Tray3 • Tray4 • Tray5 • Tray6 • Tray7 • Tray8 • Tray9 • Tray10 • Tray11 • Tray12 • Manual	/JDF/ResourcePool/La
	PPS Paper Type	The Paper Type of the inter sheet. Custom Value: The user-defined value	{job:paper.type[]}	Plain	/JDF/ResourcePool/La
				CoatedA	/JDF/ResourcePool/La /JDF/ResourcePool/La
				CoatedB	/JDF/ResourcePool/La /JDF/ResourcePool/La
				Fine	/JDF/ResourcePool/La /JDF/ResourcePool/La
				Book	/JDF/ResourcePool/La /JDF/ResourcePool/La
				Embossed	/JDF/ResourcePool/La /JDF/ResourcePool/La

Konica Minolta 1515 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
				Embossed2	/JDF/ResourcePool/La /JDF/ResourcePool/La
				USER	/JDF/ResourcePool/La /JDF/ResourcePool/La
				BlankInsert	/JDF/ResourcePool/La
				Transparency	/JDF/ResourcePool/La
				Thick1	/JDF/ResourcePool/La
				Thick2	/JDF/ResourcePool/La
				Thin	/JDF/ResourcePool/La
				Recycled	/JDF/ResourcePool/La
				ExclusiveA	/JDF/ResourcePool/La
				ExclusiveB	/JDF/ResourcePool/La
				ExclusiveC	/JDF/ResourcePool/La
				ExclusiveD	/JDF/ResourcePool/La
				ExclusiveE	/JDF/ResourcePool/La
				ExclusiveF	/JDF/ResourcePool/La
				ExclusiveG	/JDF/ResourcePool/La
				ExclusiveH	/JDF/ResourcePool/La
				Exclusivel	/JDF/ResourcePool/La
				ExclusiveJ	/JDF/ResourcePool/La
				ExclusiveK	/JDF/ResourcePool/La
				ExclusiveL	/JDF/ResourcePool/La
				ExclusiveM	/JDF/ResourcePool/La
				Seal	/JDF/ResourcePool/La
				Trace	/JDF/ResourcePool/La
				ColorSpecific	/JDF/ResourcePool/La
				HighQuality	/JDF/ResourcePool/La
				CoatedGlossLaser	/JDF/ResourcePool/La
				CoatedGlossOffset	/JDF/ResourcePool/La
				CoatedMatteLaser	/JDF/ResourcePool/La
				CoatedMatteOffset	/JDF/ResourcePool/La
				Envelope	/JDF/ResourcePool/La /JDF/ResourcePool/La
				PrePrinted	/JDF/ResourcePool/La /JDF/ResourcePool/La
				Custom Value	/JDF/ResourcePool/La

Konica Minolta 1516 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	PPS Paper Width	The Paper Width of the inter sheet in points. This value is determined by the value set for Basic Settings > Paper Unit. Example: If Job Ticket has a value of 8.5 inches (Letter), then the value is converted to 612 points in metadata.	{job:paper.w[]}	255.096 - 936	/JDF/ResourcePool/La
	PPS Paper Height	The Paper Height of the inter sheet in points. This value is determined by the value set for Basic Settings > Paper Unit. Example: If Job Ticket has a value of 11 inches (Letter), then the value is converted to 792 points in metadata.	{job:paper.h[]}	374.184 - 3401.568	/JDF/ResourcePool/La
	PPS Paper Weight	The Paper Weight of the inter sheet in g/m2.	{job:paper.weight[]}	 40 50 62 72 92 131 162 210 245 300 400 	/JDF/ResourcePool/La
	PPS Paper Color	The Paper Color of the inter sheet. See ⁴ for limitation details. Custom Value: The user-defined value	{job:paper.color[]}	 White ClearWhite Yellow Pink Blue Green Other Goldenrod Gray Ivory Orange Red Cream Custom Value 	/JDF/ResourcePool/La
	PPS Paper User Color	User-defined Paper Color. See ⁴ for limitation details.	{job:paper.usercolor[]}	Symbol, space, or alphanumeric characters allowed.	/JDF/ResourcePool/La /JDF/ResourcePool/La

Konica Minolta 1517 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	PPS Use Perforated Paper	Use to indicate whether an output tray contains Perforated Paper.	{Job:paper.useperforated[]}	• ON • OFF	JDF/ResourcePool/Lay
	PPS Paper Tab Type	The number of Tabs in a Tab set. A Tab set is a series of sequential tabs printed in a specified order (based on the document's Orientation). A Tab set may be repeated multiple times for a single print job.	{job:paper.tabtype[]}	 Tab Tab2 Tab3 Tab4 Tab5 Tab6 Tab7 Tab8 Tab9 Tab10 Tab11 Tab12 Tab13 Tab14 Tab15 	JDF/ResourcePool/Lay
	PPS Number of Inserts	The number of blank inserts.	{job:paper.copies[]}	1-500	JDF/ResourcePool/Lay
	PPS Staple	The Staple setting for the inter sheet. The staple position can be changed with the Binding Position setting. SameAsBody: This value is determined by the value set for Finishing Settings > Staple.	{job:staple[]}	SameAsBody	/JDF/ResourcePool/Sti
				OFF	/JDF/ResourcePool/St
				1	/JDF/ResourcePool/St
				2	/JDF/ResourcePool/Stil
				Narrow	/JDF/ResourcePool/Sti /JDF/ResourcePool/Sti
				Narrow+	/JDF/ResourcePool/St /JDF/ResourcePool/St
	PPS Punch Setting	The punch settings for the inter sheet. SameAsBody: This value is determined by the value set for Finishing Settings > Punch.	{job:punch.setting[]}	SameAsBody	/JDF/ResourcePool/Hc
				ON	/JDF/ResourcePool/Hc
				OFF	/JDF/ResourcePool/Hc

Konica Minolta 1518 / 1597

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case-sensitive)	JDF Job Ticket XPA
	PPS Punch	The number of Punch holes that are applied to the inter sheet.	{job:punch[]}	23410	/JDF/ResourcePool/Hc
	PPS Finish Stapling	The finish stapling settings of the inter sheets.	{job:staple.finishstapling[]}	• ON • OFF	JDF/ResourcePool/Stil
Image Quality Settings	Resolution	The print Resolution of the job.	{job:resolution}	6001200	JDF/ResourcePool/Into
Customer Information	CommentURL	Can be used as a link to an MIS or to any other system. Example:	{job:customer.commentURL}	URL	/JDF/@CommentURL
	Customer's First Name	http://127.0.0.1 Customer's First Name	{job:customer.firstname}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Last Name	Customer's Last Name	{job:customer.familyname}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Address 1	Customer's Address	{job:customer.address}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Address 2		{job:customer.extendedaddress}	Symbol, space, or alphanumeric characters allowed.	/JDF/@kmbs:Address /JDF/CustomerInfo/Co
	Customer's City	Customer's City	{job:customer.city}	Symbol, space, or alphanumeric characters allowed.	/JDF/Customerinfo/Co
	Customer's State	Customer's State	{job:customer.state}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Zip Code	Customer's Postal Code	{job:customer.postalcode}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Country	Customer's Country	{job:customer.country}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Company	Company details of the customer	{job:customer.company}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co
	Customer's Phone	Customer's Phone Number	{job:customer.phone}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co /JDF/CustomerInfo/Co
	Customer's Fax	Customer's Fax Number	{job:customer.fax}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Cc /JDF/CustomerInfo/Cc
	Customer's Email	Customer's Email Address	{job:customer.email}	Symbol, space, or alphanumeric characters allowed.	/JDF/CustomerInfo/Co /JDF/CustomerInfo/Co
	JobCreatedBy	The name of the person who created or is responsible for the job.	{job:createdby}	Symbol, space, or alphanumeric characters allowed.	JDF/AuditPool/Create

Konica Minolta 1519 / 1597

- ¹ If {job:offset} is ON then, {job:offset.copy} and {job:offset.pages} are supported, and values for both may be set for a single Job Ticket within the following limits:
 - Both values may be set to 1.
 - If one value is set at 2 or higher, the second value MUST be set to 1.

Tab Settings Metadata

The metadata used in Tab and Bleed Tab nodes are described in the table that follows:

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case- sensitive)	JDF Job Ticket XPATH
Tab Settings	Tab Paper Width	Tab Paper Width in points. This value is determined by the value set for Basic Settings >Paper Unit. Example: If Job Ticket has a value of 9 inches (LetterTab), then the value is converted into 648 points in metadata.	{job:tab.paper.w}	255.096 - 936	/JDF/kmbs:TabSettings/Media/@Dimension
	Tab Paper Height	Tab Paper Height in points. This value is determined by the value set for Basic Settings >Paper Unit. Example: If Job Ticket has a value of 11 inches (LetterTab), then the value is converted into 792 points in metadata.	{job:tab.paper.h}	374.184 - 3401.568	/JDF/kmbs:TabSettings/Media/@Dimension

Konica Minolta 1520 / 1597

² Both {job:paper.color} and {job:paper.usercolor} are supported, and values for both may be set for a single Job Ticket.

³ If a workflow contains a **Job Ticket Parser** node and a **Job Ticket Generator** node, the metadata value {job:paper.unit} is handled as follows. The **Job Ticket Parser** node takes the {job:paper.unit} value and converts the Job Ticket Paper Size from its user-defined value (**in** or **mm**) to points. Downstream in the workflow, the **Job Ticket Generator** node converts point value back to the {job:paper.unit} original value (either **in** or **mm**).

⁴ Both {job:paper.color[]} and {job:paper.usercolor[]} are supported and values for both may be set for a single Job Ticket.

Category	Parameter Name	Description	Metadata Key	Metadata Supported Values (NOT case- sensitive)	JDF Job Ticket XPATH
	Tab Paper Weight	Tab Paper Weight in g/m2.	{job:tab.paperweight}	 40 50 62 72 92 131 162 210 245 300 400 	/JDF/kmbs:TabSettings/Media/@Weight
	Tab Text	Text displayed in the Tab Area/Chapter Name.	{job:tab.text}	Symbol, space, or alphanumeric characters allowed	/JDF/kmbs:TabSettings/*kmbs:SheetParams/@kmbs:TabText
	Tab Sheet Page Number	List of Page Numbers to which the Tab is applied.	{job:tab.page}	Array of positive integers	/JDF/kmbs:TabSettings/*kmbs:SheetParams/@kmbs:Page
	File Order	List of Files or the File Path to be merged.	{job:file.order}	Array of PDF file paths.	/JDF/kmbs:FileOrderInformation/*Order/@File
	Number of Tabs	The number of Tabs in a Tab set. A Tab set is a series of sequential tabs printed in a specified order (based on the document's Orientation). A Tab set may be repeated multiple times for a single print job.	{job:tab.amount}	 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 	/JDF/kmbs:TabSettings/Media/@MediaSetCount

Tabs: Inch to Point Conversion Table

For Tabs to print as expected, the **Tab Paper Size** metadata values submitted to a node must be modified to correspond to the **Expected Tab Paper Width** and **Expected Tab Paper Height** point values. The conversion details are provided below:

Paper Size	PDF Document Paper Width in points	PDF Document Paper Height in points	Expected Tab Paper Width in points	Expected Tab Paper Height in points
Letter	612	792	648	792
Half Letter	396	612	432	612
Tabloid	792	1224	828	1224
А3	842	1191	878	1191
A4	595	842	631	842

Konica Minolta 1521 / 1597

Paper Size	PDF Document Paper Width in points	PDF Document Paper Height in points	Expected Tab Paper Width in points	Expected Tab Paper Height in points
A5	420	595	456	595
В4	729	1032	765	1032
B5	516	729	552	729

Job Ticket Metadata

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MFP Supported List

Note: For an up-to-date list of MFP models that are certified to support Dispatcher Phoenix, please visit the bEST website.

MFP Panel Node

- Files are sent from the MFP at time of scan
- Native Interface provides MFP standard looking interface for scanning
- Graphical Interface on MFP panel provides a rich, colorful interface for scanning

Models	Graphical Panel	Native Panel
AccurioPress C6085, AccurioPress C6100	Yes	No
AccurioPress 6036, AccurioPress 6036P, AccurioPress 6120	Yes	No
AccurioPress C4080, AccurioPress C4070, AccurioPrint C4065	Yes	No
AccurioPress C3080, AccurioPress C3070, AccurioPrint C3070L	Yes	No
AccurioPress C2070, AccurioPress C2060, AccurioPress C2060L	Yes	No
AccurioPress C3080, AccurioPress C3070, AccurioPrint C3070L	Yes	No
bizhub PRESS 1250, PRO 1100, PRESS 1052, PRO 951	Yes	No
bizhub PRESS C1070, PRESS C1060, PRO C1060L	Yes	No
bizhub PRESS C1085, PRESS C1100	Yes	No
bizhub 4750, 4050	Yes	Yes
bizhub 4751i, C4751i	Yes	Yes
bizhub 754e, 654e	Yes	Yes
bizhub 754, 654	Yes	Yes
bizhub 751, 601**	Yes	Yes
bizhub 554e, 454e, 364e, 284e, 224e	Yes	Yes
bizhub 652, 552**	Yes	Yes
bizhub 651i	Yes	Yes
bizhub 501, 421, 361*	Yes	Yes
bizhub 423, 363, 283, 223**	Yes	Yes
bizhub 367, 287, 227	Yes	Yes
bizhub 42, 36**	No	Yes
bizhub 558, 458, 368, 308	Yes	Yes
bizhub 4752, 4052	Yes	Yes
bizhub 658e, 558e, 458e, 368e, 308e	Yes	Yes
bizhub 958, 808, 758	Yes	Yes
bizhub C3851FS, C3851, C3351	Yes	Yes
bizhub C3850, C3850FS, C3350	Yes	Yes
bizhub C754e, C654e	Yes	Yes

Konica Minolta 1522 / 1597

Models	Graphical Panel	Native Panel
bizhub C754, C654	Yes	Yes
bizhub C751i, 751i	Yes	Yes
bizhub C652DS, C552DS**	Yes	Yes
bizhub C652, C552, C452**	Yes	Yes
bizhub C651i	Yes	Yes
bizhub C650, C550, C451**	Yes	Yes
bizhub C554e, C454e, C364e, C284e, C224e	Yes	Yes
bizhub C554, C454, C364, C284, C224	Yes	Yes
bizhub C368, C308, C258	Yes	Yes
bizhub C361i, 361i	Yes	Yes
bizhub C360, C280, C220**	Yes	Yes
bizhub C353, C253, C200, C200**	Yes	Yes
bizhub C35**	No	Yes
bizhub C287, C227	Yes	Yes
bizhub C360i, C300i, C250i	Yes	No
bizhub C658, C558, C458	Yes	Yes
bizhub C759, C659	Yes	Yes
bizhub 306i, 266i, 246i, 226i	Yes	Yes
bizhub C287i, C286i, C266i, C257i, C256i, C227i, C226i	Yes	Yes
ineo+ 754, 654	Yes	Yes
ineo+ 554	Yes	Yes
ineo+ 3850, 3350	Yes	Yes
ineo 754	Yes	Yes
ineo+ 554e, 454e, 354e	Yes	Yes
ineo 654	Yes	Yes
ineo 554e, 454e, 364e, 284e	Yes	Yes
ineo 4750, 4050	Yes	Yes
ineo+ 3850FS	Yes	Yes
ineo 367	Yes	Yes
ineo 758, 958	Yes	Yes
ineo+ 287, 227	Yes	Yes
ineo+ 658, 558, 458	Yes	Yes
ineo 287, 227	Yes	Yes
ineo+ 368, 308, 258	Yes	Yes
ineo 306, 266	Yes	Yes
ineo+ 759	Yes	Yes
ineo+ 3851, 3351, 3851FS	Yes	Yes
ineo 558, 458, 368, 308	Yes	Yes
ineo+ 659	Yes	Yes
ineo 4752, 4052	Yes	Yes
ineo+ 360i, 300i, 250i	Yes	No

^{*}Requires special firmware

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** The models support Dispatcher Phoenix version 6.13 and prior. Some features and functionality of newer versions of Dispatcher Phoenix may not be supported on these devices.

MFP User Box Node

- Files can be retrieved from an MFP User Box
- Supports password-protected User Boxes for added security
- Scheduler allows for files to be pulled from MFP at a scheduled time (e.g., after 1:00 AM when network bandwidth is available)

The following list includes all MFPs that support Dispatcher Phoenix User Box collection.

Models
bizhub PRESS C8000, C7000, C6000 ¹
bizhub PRO 1200, 1051, 950, C5501, C6000L, C6501, 6500 ²
bizhub 754e, 654e
bizhub 754, 654
bizhub 751, 601
bizhub 750, 600
bizhub 554e, 454e, 364e, 284e, 224e
bizhub 652, 602, 552, 502
bizhub 501, 421, 361
bizhub 500, 420, 360
bizhub 423, 363, 283, 223
bizhub 362, 282, 222
bizhub 25
bizhub 558, 458, 368, 308
bizhub 4752, 4052
bizhub 658e, 558e, 458e, 368e, 308e
bizhub 958, 808, 758
bizhub C754, C654
bizhub C754e, C654e
bizhub C652DS, C552DS
bizhub C652, C552, C452
bizhub C650, C550, C451
bizhub C450, C352, C351, C300, C252, C250
bizhub C554, C454, C364, C284, C224
bizhub C554e, C454e, C364e, C284e, C224e
bizhub C360, C280, C220
bizhub C368, C308
bizhub C353, C253, C203, C200
bizhub C350
bizhub 350, 250, 200 ³
bizhub C658, C558, C458
bizhub C3851FS, C3851, C3351
bizhub C759, C659
bizhub C360i, C300i, C250i
bizhub 306i, 266i, 246i, 226i
bizhub C287i, C286i, C266i, C257i, C256i, C227i, C226i

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Models
ineo+ 754, 654
ineo+ 554
ineo+ 3850, 3350
ineo 754
ineo+ 554e, 454e, 354e
ineo 654
ineo 554e, 454e, 364e, 284e
ineo 4750, 4050
ineo+ 3850FS
ineo 367
ineo 758, 958
ineo+ 287, 227
ineo+ 658, 558, 458
ineo 287, 227
ineo+ 368, 308, 258
ineo 306, 266
ineo+ 759
ineo+ 3851, 3351, 3851FS
ineo 558, 458, 368, 308
ineo+ 659
ineo 4752, 4052
ineo+ 360i, 300i, 250i
Legacy Secured: bizhub Pro 1050, bizhub Pro 920, Konica 7145 (late firmware release) ⁴
Legacy Konica 7272, 7255, 7235, 7228, 7155, 7165, 7145, 7135, 7130, 7085, 7075, 7045, 7040, 7033, 7030, 7025, 7022, 7020

¹ Only JPG files can be collected from these bizhub PRESS Machines.

MFPs that Support Rx Shield

Dispatcher Phoenix's Rx Shield solution provides healthcare providers with a cost-effective and secure prescription print solution that uses regular copy paper. Designed to conform with prescription printing mandates issued by the Centers for Medicare and Medicaid Services, Rx Shield automatically applies the following tamper-resistant features to printed prescriptions:

- Anti-copy pantograph with customizable security warning text
- Auto-erasure and modification detection
- Pharmacist notification of security features

Anti-copying functionality works with all Konica Minolta MFPs. However, creating an Rx Shield-protected prescription is only supported on the following devices with the Copy Security functionality/firmware:

Color Models

bizhub C754e	bizhub C364e	bizhub C284	bizhub C360	
bizhub C654e	bizhub C284e	bizhub C224	bizhub C280	
bizhub C754	bizhub C224e	bizhub C652	bizhub C220	

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 $^{^{\}rm 2}$ Only TIFF files can be collected from these bizhub PRO/Press Machines.

³ These Konica Minolta models must have phase 2.5 firmware installed.

⁴ Legacy Secured: These machines scan into boxes which may or may not require a password.

bizhub C654	bizhub C554	bizhub C552	bizhub C550
bizhub C554e	bizhub C454	bizhub C452	bizhub C3851FS
bizhub C454e	bizhub C364	bizhub C650	bizhub C3351
bizhub C368	bizhub C308	bizhub C258	bizhub C658
bizhub C558	bizhub C458	bizhub C287	bizhub C227
bizhub C550i	bizhub C450i	bizhub C650i	bizhub C250i
bizhub C300i	bizhub C360i	bizhub C4050i	

Monochrome Models

bizhub 754e	bizhub 554e	bizhub 224e	bizhub 363
bizhub 654e	bizhub 454e	bizhub 652	bizhub 283
bizhub 754	bizhub 364e	bizhub 552	bizhub 223
bizhub 654	bizhub 284e	bizhub 423	bizhub 367
bizhub 287	bizhub 227	bizhub 808	bizhub 958
bizhub 368	bizhub 308	bizhub 4750i	bizhub 4050i
bizhub 4052	bizhub 300i	bizhub 550i	bizhub 4752
bizhub 360i	bizhub 650i	bizhub 450i	bizhub 750i

Note: Currently, these features only work with Konica Minolta MFP devices that support Copy Protection. Support for other devices will be announced once Copy Security functionality/firmware compatibility has been confirmed.

Dispatcher Phoenix Privacy Policy

This Privacy Statement is effective as of August 2018.

At Konica Minolta, we recognize the importance of protecting your personal information and are committed to processing it responsibly and in compliance with applicable data protection laws in all countries in which Konica Minolta operates.

This Privacy Statement describes Konica Minolta's general privacy practices in regards to the Dispatcher Phoenix product line that apply to personal information we collect, use and share about consumers and other individuals, clients, business partners, suppliers and organizations with which Konica Minolta has or contemplates a business relationship.

Why and how we collect and use your personal information

We may collect your personal information as an individual for various purposes, such as the following:

Dispatcher Phoenix Software Registration and NFR (Not For Resale) License Requests

When you register Dispatcher Phoenix software or request an NFR license, we will collect contact information such as your name, password, email address, and company information. When you request an NFR license, we will also collect information about your position, relationship to Konica Minolta, and device. We will also collect information on whether you wish to receive emails and other notifications from us.

Customer Feedback

When you submit feedback through Dispatcher Phoenix's Customer Feedback agent, we will collect your email address and system and application details (e.g., operating system, processor(s), physical memory, application name, etc.).

Software Activation

We collect system information (e.g., hard disk model, baseboard model, etc.) along with your SEC (Solutions Engineering Center) account name and password when you activate the software so we can register the software to your account.

Solutions Engineering Center Order Fulfilment/Support

Our Inventory Management System (IMS) collects customer order details in order to fulfill customer orders. If you engage our Solutions Engineering Center (e.g., asking for support, etc.), we will collect the information you submit to us, such as your contact information.

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Where we reference that we use your personal information in relation to marketing, improvement or development of our products or services, for reasons of safety and security, or regulatory requirements other than in connection with your agreement or request, we will do this on the basis of your consent. When we collect and use your personal information subject to the EU Privacy Legislation, this may have consequences for your rights.

Sharing of Personal Information

As a global organization offering a wide range of products and services, with business processes, management structures and technical systems that cross borders, Konica Minolta has implemented global policies, along with standards and procedures, for consistent protection of personal information.

Between Konica Minolta controlled subsidiaries, we only grant access to personal information on a need-to-know basis, necessary for the purposes for which such access is granted.

If Konica Minolta decides to sell, buy, merge or otherwise reorganize businesses in some countries, such a transaction may involve the disclosure of personal information to prospective or actual purchasers, or the receipt of such information from sellers. It is Konica Minolta's practice to require appropriate protection for personal information in these types of transactions.

Please be aware that in certain circumstances, personal information may be subject to disclosure to government agencies pursuant to judicial proceeding, court order, or legal process. We may also share your personal information to protect the rights or property of Konica Minolta, our business partners, suppliers or clients, and others when we have reasonable grounds to believe that such rights or property have been or could be affected.

International Transfers

The international footprint of Konica Minolta involves a large number of transfers of personal information between different subsidiaries, as well as to third parties located in the countries where we do business. Some countries have implemented transfer restrictions for personal information, in connection with which Konica Minolta takes various measures. Where required, Konica Minolta implements Standard Contractual Clauses approved by the EU Commission, or similar contractual clauses in other jurisdictions. This includes transfers to suppliers or other third parties. You can request a copy of the EU Standard Contractual Clauses at legal@kmbs.konicaminolta.us.

Information Security and Accuracy

We intend to protect your personal information and to maintain its accuracy. Konica Minolta implements reasonable physical, administrative and technical safeguards to help us protect your personal information from unauthorized access, use and disclosure. We also require our suppliers to protect such information from unauthorized access, use and disclosure.

Retention Period

We will retain personal information as long as your account is active or the information is needed to provide services, including complying with legal and regulatory obligations (e.g. audit, accounting and statutory retention terms), handling disputes, and for the establishment, exercise or defense of legal claims in the countries where we do business.

How to contact us

If you have a question related to this Privacy Statement, please contact us at legal@kmbs.konicaminolta.us. Your message will be forwarded to the appropriate member of Konica Minolta's Data Privacy Team, such as Data Protection Officers or members of their teams.

For the purposes of the EU General Data Protection Regulation (GDPR), the controller of your personal information is Konica Minolta Business Solutions U.S.A., Inc., 100 Williams Drive, Ramsey, New Jersey, United States, unless indicated otherwise. Where Konica Minolta or a subsidiary it controls (not established in the European Economic Area (EEA)) is required to appoint a legal representative in the EEA, the representative for all such cases is Konica Minolta Business Solutions Europe GmbH, Europaallee 17, 30855 Langenhagen, Deutschland.

Konica Minolta is not the controller in situations such as:

- Personal information processed in connection with a contractual relationship, or with entering into a contractual relationship with a specific Konica Minolta subsidiary. In this case the controller of personal information is the Konica Minolta contracting company, which is the legal entity with which you or your employer have, or will have, the contract.
- Personal information collected on the physical site or location of a Konica Minolta subsidiary. In this case that subsidiary is the controller of the
 personal information.

Your Rights

You can request to access, update or correct your personal information. You also have the right to object to direct marketing. You can make a request at legal@kmbs.konicaminolta.us.

You may have additional rights pursuant to your local law applicable to the processing. For example, if the processing of your personal information is subject to the EU General Data Protection Regulation ("GDPR"), and your personal information is processed based on legitimate interests, you have the right to object to the processing on grounds relating to your specific situation. Under GDPR you may also have the right to request to have your personal information deleted or restricted and ask for portability of your personal information.

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Right to Lodge a Complaint

In the event you consider our processing of your personal information not to be compliant with the applicable data protection laws, you can lodge a complaint:

- Directly with Konica Minolta at legal@kmbs.konicaminolta.us.
- With the competent data protection authority. The name and contact details of the Data Protection Authorities in the European Union can be found here

Regular Expressions

Regular Expressions

Regular Expressions (RegEx) are specially written strings that are used to search text. Regular Expressions have a formal syntax that define how the search is performed. They provide flexibility where a simple string match would not suffice.

Supported Operators: - The following table contains some of the common operators supported by Regular Expressions in Dispatcher Phoenix. Please note that this is not a complete list of all operators.

Match Modifiers - These characters will affect how the search is performed **Operator**

\ General escape character

- . (period) Match any character
- * Match 1 or more of the previous character
- ? Match 0 or 1 of the previous character
- [] Defines a set of characters to match i.e. [0-9] match the digits 0 to 9; [a-z] match lower case letter a to z; [A,E,I,O,U] match upper case vowels
- [^] Defines a set that will not match i.e. [^0-9] do not match the digits 0 to 9
- ^ Match the start of a line
- \$ Match the end of a line

Character Classes

These characters will match against single characters, words or special characters.

\d Match any decimal digit (short form of [0-9])

\D Do not match any decimal digit ([$^0-9$])

\s Match any whitespace character (tab, newline, formfeed, carriage return, or space)

\S Do not match any whitespace character

\w Match any "word" character [a-z, A-Z, 0-9, _]

\W Do not match any "word" character [^ a-z, A-Z, 0-9, _]

\b Match a word boundary

\B Do not match a word boundary

\cx Match the control-x character where x is any character i.e. \cs matches the control-s character

\e Match the escape character (hex 1B)

\f Match the formfeed character (hex 0C)

\n Match the newline character (hex 0A)

\r Match the carriage return character (hex 0D)

\t Match the tab character (hex 09)

\ddd Match the character with the octal code ddd

\xhh Match the character with the hex code hh

For more information on regular expressions, please visit:

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http://en.wikipedia.org/wiki/Regular_expression

For a tutorial to learn more about how to use regular expressions please visit:

http://www.regular-expressions.info/tutorial.html

The syntax supported by **Dispatcher Phoenix** is defined at the following link: http://developer.gnome.org/glib/stable/glib-regex-syntax.html

Using Special Characters In Regular Expressions

If you want to use the following special characters as a literal in a regular expression, you must use a backslash (\) to suppress their special meaning:

[opening square bracket

\ backslash

- ^ caret
- \$ dollar sign
- . period

| vertical bar or pipe symbol

- ? question mark
- * asterisk
- + plus sign

(opening round bracket

) closing round bracket

For example, if you want to match 1+1=2, the correct regular expression is: 1+1=2; otherwise the plus sign will have a special meaning.

Content Search

The following examples of using regular expressions in **Dispatcher Phoenix** assume that the following text file is the file searched.

Line	Text
1	This is MyTest a file to test regular expressions.
2	The technicians reviewed the latest test results looking for
3	a pattern that would explain the reported symptoms. So far the
4	testing had found nothing that would explain the results they were getting.
5	Test #1 - Good
6	Test #2 - Failed
7	Test #3 - Passed
8	Test #4 - Failed
9	Test #5 - Failed

• To search for the string "test", enter "test" into the search text field. Depending on the match case option, the search results would be as follows:

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Line	Match Case	Do Not Match Case
1	test	MyTest, test
2	latest, test	latest, test
4	testing	testing
5		Test
6		Test
7		Test
8		Test
9		Test

• To search for the word "test" it needs to be delimited with the word boundary operator \b, as such, a search using the string "\btest\b" will return the following results:

Line	Match Case	Do Not Match Case
1	test	test
2	test	test
5		Test
6		Test
7		Test
8		Test
9		Test

• To locate multiple strings with a numeric value the "\d" operator can be used. Using the search string "Test #\d" will produce the following result:

Line	Match Case	Do Not Match Case
5	Test#1	Test #1
6	Test #2	Test #2
7	Test#3	Test #3
8	Test #4	Test #4
9	Test #5	Test #5

File Name Search

The Parse Node has the ability to search for file names using regular expressions. Unlike the other parser nodes which operate on the contents of files, the Parser Node operates on file names.

For example, with the following list of files:

testfile1.txt

testfile2.xls

testfile3.docx

testfile4.doc

testfile5.psd

testfile6.pdf

testfile7.jpg

testfile8.tiff

Using a search string of "testfile\d" would match all of the files in the preceding list.

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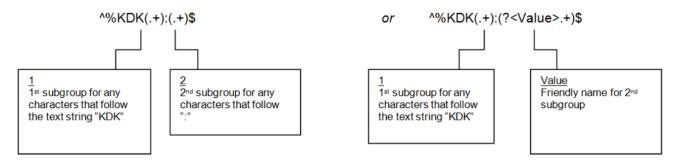
Advanced Functionality with Metadata Referencing

The parsing nodes (Insert, Parse and Distribute, Parse and Insert, and Parse and Replace) also provide advanced functionality when using regular expressions to give you more control over your search and insert, replace, or distribute operations.

With regular expressions and Dispatcher Phoenix's metadata referencing feature, you can specify subgroups to extract information from subsections of the matched text; this information can then be used in substitution or insertion operations or to store those values as metadata for future use.

Subgroups are represented by a set of parentheses wrapped around a subsection of the regular expression. Subgroups are given a unique number (starting at number 1 and going from left to right) and can be referenced by that number; in addition, groups can be given "friendly names" (enclosed in sharp brackets "< >") so that they can be referenced by a name instead.

For example:



To reference subgroups, you would use the class of 'parser' with the subgroup number separated by a colon (:). In the example above, to reference the first subgroup, you would use: {parser:1}; to reference the second reference group, you would use either: {parser:2} or {parser:Value}, (depending on which regular expression you used).

To use this subgroup information in a replace or insert operation, you would use one of the following:

\1 - Where "1" is the numeric value of the subgroup

g<1> - Where "1" is the numeric value of the subgroup

\g<Value> - Where "Value" is the subgroup's friendly name

Specifying Page Level Metadata

The metadata for a specific page can be specified by adding a page number between two square brackets ([]). This will return the text of the first value for the subgroup found on the specified page. For example:

{bar1:Address[5]} would return the value of bar1:Address for page 5.

To specify document-level metadata, add a 0 between two square brackets or leave it blank. For example:

{bar1:Address[0]}

{bar1:Address}

If you are processing in a page-per-page manner (e.g., applying a Bates stamp or annotation), you can use 'current' between two square brackets to retrieve the data from the page being processed. For example:

{annotate:text[current]}

Specifying Metadata Occurrence Number

• You can also specify an occurrence number using another pair of square brackets following the page-level brackets. For example:

{value:bar[3] [2] would return the second occurrence of "value:bar" on page 3.

{parser:Value[0][1]} would return the first document-level occurrence of "parser:Value".

• To specify the first value found, use: []

For example, {bar1:zone.Address[]} would return the first barcode found in the "Address" zone, regardless of page.

- To indicate that multiple values should be returned as a joined string, use: \mid

For example, {bar1:zone.part number[]\-} would return all values of bar1:zone.part number, separated by "-".

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System-Defined Variables

DATE TYPES

Variable: %a (Abbreviated weekday name)

Syntax: {date:%a}

Variable: %A (Full weekday name)

Syntax: {date:%A}

Variable: %b (Abbreviated month name)

Syntax: {date:%b}

Variable: %B (Full month name)

Syntax: {date:%B}

Variable: %d (Day of the month (01-31))

Syntax: {date:%d}

Variable: %H (Hour in 24h format (00-23))

Syntax: {date:%H}

Variable: %I (Hour in 12h format (01-12))

Syntax: {date:%l}

Variable: %j (Day of the year (001-366))

Syntax: {date:%j}

Variable: %m (Month as a decimal number (01-12))

Syntax: {date:%m}

Variable: %M (Minute (00-59))

Syntax: {date:%M}

Variable: %p (AM or PM designation)

Syntax: {date:%p}

Variable: %S (Second (00-61))

Syntax: {date:%S}

Variable: %u (Week number starts with Sunday as the first day of week (00-53))

Syntax: {date:%U}

Variable: %w (Week number starts with Monday as the first day of week (0-6))

Syntax: {date:%w}

Variable: %y (Year, last two digits (00-99))

Syntax: {date:%y}
Variable: %Y (Year)
Syntax: {date:%Y}

Variable: %Z (Time zone name or abbreviation)

Syntax: {date:%Z}

Variable: %% (Time zone name or abbreviation)

Syntax: {date:%%}

MFP Panel

Variable: jcf_id (The file name (MFP's mac address + time/stamp))

Syntax: {best:jcf_id}

Variable: job_id (The MFP's job ID)

Syntax: {best:job_id}

Variable: mac (The MFP's mac address)

Syntax: {best:mac}

Variable: mfp_address (The MFP's IP address)

Syntax: {best:mfp_address}

Variable: num_files (The number of files that were sent as part of the job)

Syntax: {best:num_files}

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Variable: pages (The number of pages scanned)

Syntax: {best:pages}

Variable: product_id (The SNMP ID for the device)

Syntax: {best:product_id}

Variable: product_name (The manufacturer and model name of the device)

Syntax: {best:product_name}

Variable: user_id (The numeric ID of the logged-in user)

Syntax: {best:user_id}

Variable: user_name (The MFP's user name)

Syntax: {best:user_name}

EMAIL

Variable: body (Content of the email)

Syntax: {email:body}

Variable: cc (The email address of the carbon copied recipient)

Syntax: {email:cc}

Variable: date (The date and time that the message was received)

Syntax: {email:date}

Variable: from (The email address of the email's author)

Syntax: {email:from}

Variable: in-reply-to (The message ID of the message that the email is a reply to)

Syntax: {email:in-reply-to}

Variable: message-id (The unique identifier of the message)

Syntax: {email:message-id}

Variable: received (The tracking information generated by mail servers, including the date and time that the message was received)

Syntax: {email:received}

Variable: references (The message ID of the message that the email is a reply to and the message ID of the message that the previous reply was a

reply to, etc.)

Syntax: {email:references}

Variable: sender (The IP address of the sender)

Syntax: {email:sender}

Variable: subject (The message's subject line)

Syntax: {email:subject}

Variable: to (The email address(es) of the message's receipient(s))

Syntax: {email:to}

FILE LEVEL

Variable: fullname (File name and extension)

Syntax: {file:fullname}

Variable: name (The file name (up to the last period and not including the file extension))

Syntax: {file:name}

Variable: ext (The file extension (file name starting from the last period and going to the end))

Syntax: {file:ext}

Variable: size (The size of the file (in bytes))

Syntax: {file:size}

FILE SYSTEM

Variable: DesktopDirectory (i.e., C:\Users\username\Desktop)

Syntax: {fs:DesktopDirectory}

Variable: Personal (i.e., C:\Users\username\Documents)

Syntax: {fs:Personal}

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Variable: ProgramFiles (i.e., C:\ProgramFiles)

Syntax: {fs:ProgramFiles}

Variable: LocalApplicationData (i.e., C:\Users\username\AppData\Local)

Syntax: {fs:LocalApplicationData}

Variable: ApplicationData (i.e., C:\Users\username\AppData\Roaming)

Syntax: {fs:ApplicationData}

Variable: CommonApplicationData (i.e., C:\ProgramData)

Syntax: {fs:CommonApplicationData}

Variable: CommonProgramFiles (i.e., C:\Program Files\Common Files)

Syntax: {fs:CommonProgramFiles}

Variable: System (i.e., C:\Windows\System32)

Syntax: {fs:System}

Variable: MyPictures (i.e., C:\Users\username\MyPictures)

Syntax: {fs:MyPictures}

Variable: MyMusic (i.e., C:\Users\username\MyMusic)

Syntax: {fs:MyMusic}

Variable: Favorites (i.e., C:\Users\username\Favorites)

Syntax: {fs:Favorites}

Variable: History (i.e., C:\Users\username\AppData\Local\Microsoft\Windows\History)

Syntax: {fs:Favorites}

Variable: Programs (i.e., C:\Users\username\AppData\Roaming\Microsoft\Windows\Start Menu\Programs)

Syntax: {fs:Programs}

Variable: Recent (i.e., C:\Users\username\AppData\Local\Microsoft\Windows\Recent)

Syntax: {fs:Recent}

LPR

Variable: host (Machine name)

Syntax: {|pr:host}

Variable: jobname (Original file name)

Syntax: {lpr:jobname}

Variable: jobnumber (Unique number of print job)

Syntax: {lpr:jobnumber}

Variable: print (File name as submitted during protocol)

Syntax: {lpr:print}

Variable: queue (Queue name specified)

Syntax: {lpr:queue}

Variable: source (Name of source file)

Syntax: {lpr:source}

Variable: user (Level of logged-in user)

Syntax: {|pr:user}

Variable: user (Level of logged-in user)

Syntax: {|pr:user}

SMTP

Variable: from (The sender's mailbox (not necessarily the sender's email address). The mailbox address is wrapped in angle brackets (e.g., <user@example.com>))

Syntax: {smtp:from}

Variable: rcpt (The destination mailbox, one per recipient at the time of receipt. This will be set for all of the To, CC, and BCC mailboxes.)

Syntax: {smtp:rcpt}

USER

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Variable: domain (The Windows domain name)

Syntax: {user:domain}

Variable: name (Windows logged-in user name)

Syntax: {user:name}

Metadata Groups

The following metadata groups are created as page-level metadata:

Annotate

Variable: {annotate:variable}

Syntax: {annotate:variable[<page>]}

Example: {annotate:date[5]} - Finds the 'date' metadata on the 5th page

Advanced Bates Stamp

Variable: {bates:variable}

Syntax: {bates:variable[<page>]}

Example: {bates:counter[3]} - Finds the 'counter' metadata on the 3rd page

Advanced OCR

Variable: {ocr:zone.variable}

Syntax: {ocr:zone.variable[<page>]}

Example: {ocr:name[]} - Finds the 'name' zone in the document

Barcode Processing (Standard)

Variable: {bar1:zone.variable}
Syntax: {bar1:zone.variable[]}

Example: {bar1:zone.128[2]} Finds the '128' zone on the 2nd page

Barcode Processing (2D)

Variable: {bar2:zone.variable}
Syntax: {bar2:zone.variable[]}

Example: {bar2:zone.128[2]} Finds the '128' zone on the 2nd page

Setting Up Production Print

This guide provides the steps that are necessary to integrate Dispatcher Phoenix with production print models. Current supported models are:

- 1250 Series (bizhub PRESS 1250, bizhub PRO 1100, bizhub PRESS 1052, bizhub PRO 951)
- C1070 Series (bizhub PRESS C1070, bizhub PRESS C1060, bizhub PRO C1060L)
- C1100 Series (bizhub PRESS C1085, bizhub PRESS C1100)
- C2070 Series (AccurioPress 2070, AccurioPress C2060, AccurioPrint 2060L)
- C3070 Series (AccurioPress C3080, AccurioPress C3070, AccurioPrint C3070L)
- C6085 Series (AccurioPress C6085, AccurioPress C6100)

This guide assumes that Dispatcher Phoenix has been installed properly on a PC.

Required Options

Series	Required Options
1250	UK-205 Upgrade Kit

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Series	Required Options
C1070	IC-602A Image Controller
	UK-206 Upgrade Kit
C1100	IC-602C KM Image Controller
	UK-206 Upgrade Kit
	PF-708 Paper Feed Unit with Doc Feeder
C2070	IC-603A KM Image Controller

Step 1. Install Firmware

For the 1250 Series

Update the firmware to the following (or later versions):

- Image_Control_20 (file name: 1250us_20.zip; release notes: DLBT11300501EN01.pdf)
- IC-Unit_G00-20 (file name: 951_00P1_G00_20.zip; release notes: DLBT1300518EN00.pdf)

See the following figure:

Base Firmware					
Version	Release Date	File	Languages	Release Notes	
►lmage_Control_20_Pri	04-03-2013	1250us_20.zip (30.0 MB)		bizhub PRESS 1052, 1250, 1250P, PRO 95 Image Con	
	04-03-2013	DLBT1300501EN01.pdf (42.8 KB)		bizhub PRESS 1052, 1250, 1250P, PRO 95 Image Con	
Image_Control_15_Pri	06-15-2012	DLBT1201220EN00.pdf (36.0 KB)		bizhub PRO 951, PRESS 1052, 1250, 1250 Image Con	
	06-15-2012	951_1250us_15.zip (37.2 MB)		bizhub PRO 951, PRESS 1052, 1250, 1250 Image Con	
Image_Control_11_Pri	10-29-2012	951us_11.exe (37.8 MB)		bizhub PRO 951 Image control Version 11, Print co	
	10-29-2012	DLBT1200640EN01.pdf (28.3 KB)		bizhub PRO 951 Image control Version 11 and Print	
IC-Unit-G00-15	06-15-2012	951_00P1_G00_15.zip (207.1 MB)		bizhub PRO 951 (IC-Unit) Printer Controller Firmw	
IC-Unit_G00-20	04-03-2013	DLBT1300518EN00.pdf (73.1 KB)		bizhub PRO 951 IC-Unit Firmware Version G00-20 RE	
	04-03-2013	DLBT1300519EN00.pdf (73.6 KB)		bizhub 1052, 1250, 1250P IC-Unit Firmwar Version	
	04-03-2013	951_00P1_G00_20.zip (207.3 MB)		bizhub PRO 951 IC-Unit Firmware Version G00-20	

For the C1070 Series

Make sure that the MFP is running G00-18 or later. Additionally, when installing the Web Browser ROM on these devices, you must select the ROM starting with A5AA0Y0. The other provided browser ROMs for these devices are not compatible with Dispatcher Phoenix.

For the C1100 Series

Make sure that the MFP is running G00-18 or later. Additionally, when installing the Web Browser ROM on these devices, you must select the ROM starting with A5AA0Y0. The other provided browser ROMs for these devices are not compatible with Dispatcher Phoenix.

For the bizhub PRO 1100 Series

Make sure that the MFP is running ${\sf GU0-20}$ or later.

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All firmware supports Dispatcher Phoenix.

Step 2. Configure MFP and Controller for the Network (for 1250 Series only)

Connect and configure the MFP and Controller for the network. See the following illustration for an example:



Step 3. Configure Controller Switches

When configuring controller switches, refer to the documentation for your specific device for guidance. The following are general guidelines as well as recommendations for a few specific devices.

To configure controller switches, do the following:

- 1. Tap on the MACHINE tab on the panel's top bar.
- 2. Press the Controller button in the MACHINE screen of the control panel. The Controller Machine Setting Menu screen is displayed.
- 3. Press the 08 Administrator Setting button.
- 4. On the Administrator Setting screen, press the 01 Software Switch Setting button.
- 5. Choose the Switch Number button, then enter the number in the field.
- 6. When done, press the On button. Next, press Set.

For the 1250 Series

For best results, we recommend you change controller switches 51 and 52 to 1.

- Changing switch 51 to 1 enables scanning to Dispatcher Phoenix at 1200 dpi.
- Changing switch 52 to 1 enables scanning multiple pages as a single file.

For the AccurioPress C4080 Series

For best results, we recommend you change software switch 83 to ON.

• Changing switch 83 to ON enables scanning multiple pages as a single file to Dispatcher Phoenix.

Note: For the C4080 series, it is important to change the software switch, which is different from a controller switch. For more information on how to find software switch 83, please consult your local Konica Minolta field engineer.

To find the controller switches on the C6085, make the following selections:

• [Utility] \rightarrow [Administrator Setting] \rightarrow [Controller] \rightarrow [Software Switch Setting]

For All Other Supported Production Print Devices

For best results, we recommend changing controller switch 83 to 1.

• Changing switch 83 to 1 enables scanning multiple pages as a single file to Dispatcher Phoenix.

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Step 4. Register Dispatcher Phoenix

To register Dispatcher Phoenix on a supported production print machine, follow these steps:

- 1. In Dispatcher Phoenix, launch the MFP Registration Tool by selecting MFP Registration Tool from the Tools menu in Dispatcher Phoenix.
- 2. Add the device by doing one of the following:
 - · Select the Add MFP button to manually enter the device's IP address, or
 - · Select the Find MFP button to use the MFP Explorer tool to automatically search for all MFPs on the network.
- 3. Configure the default bEST Server Settings and authentication settings, if necessary. Refer to the Dispatcher Phoenix Web Help for more information.
- 4. Select the device listed; then click on the Register MFP button.
- 5. Add the registered device to a workflow.

Step 5. Accessing Dispatcher Phoenix

Once Dispatcher Phoenix has been registered, a Phoenix tab will appear on the top, right-hand side of the display panel, as in the following figure:

Note: If other applications are installed, an "APP" tab will appear instead.

- 1. Tap the **Phoenix** tab to display the Dispatcher Phoenix application icon.
- 2. Touch the Dispatcher Phoenix application icon to begin. All running workflows will appear.

Troubleshooting for the 1250 Series

If the MFP NIC does not have network connectivity, a blank screen will be displayed

Important!

- Use of the MFP's Start button to begin the scan is not supported on any production print device.
- The number keypad does not work on any production print device.
- OpenAPI solutions, including Dispatcher Phoenix, do not work with 3rd party controllers.

Single Sign-On Authentication

Dispatcher Phoenix offers single sign-on access to MFPs with user authentication either via the MFP's authentication settings or an external authentication server (i.e., Active Directory).

Setting up Dispatcher Phoenix to run on an MFP with single sign-on capabilities involves these general steps:

- 1. Ensuring that the PC's DNS Settings are configured correctly.
- 2. Connecting the PC that is running Dispatcher Phoenix to a domain.
- 3. Configuring the MFP to authenticate against an external server.
- 4. Configuring the user authentication option for single sign-on in Dispatcher Phoenix.
- 5. Running the workflow.

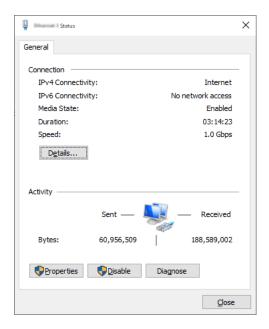
Note: PC instructions are written for Windows 10.

Configuring DNS (Domain Name Server) Settings

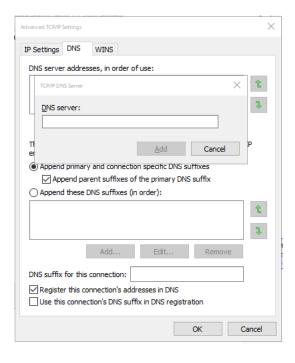
Make sure to change the PC's DNS settings to point to the DNS Server on your network. Follow these steps:

- 1. Go to Control Panel > Network and Internet > Network and Sharing Center.
- 2. Click the **Local Area Connection** link next to your network. The Local Area Connection Status window will appear, as in the following illustration:

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- 3. Click on the **Properties** button to bring up the Local Area Connection Properties window.
- 4. Select Internet Protocol Version 4 TCP IPv4; then click on the Properties button.
- 5. On the Internet Protocol Version 4 (TCP/IPv4) Properties window, click on the Advanced... button to view the Advanced TCP/IP Settings.
- 6. On the Advanced TCP/IP Settings window, choose the DNS tab to display the DNS server addresses.
- 7. Click the Add... button to bring up the TCP/IP DNS Server window; then enter the DNS server address.



8. When you are done, click the **Add** button.

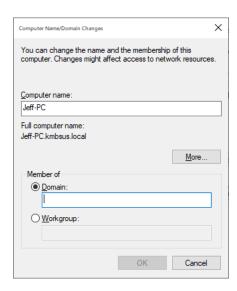
Connect PC to Domain

A domain is a collection of computers on a network with common rules and procedures that are administered as a unit. Each domain has a unique name. Typically, domains are used for workplace networks. To connect your computer to a domain, you'll need to know the name of the domain and have a valid user account on the domain.

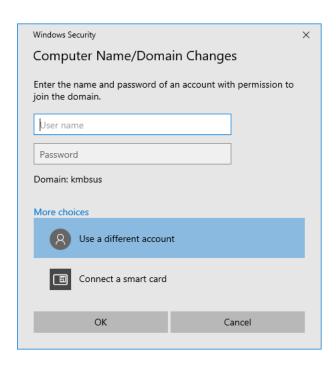
To connect your PC to the domain, follow these steps:

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- 1. Go to Control Panel > System and Security > System.
- 2. Under the Computer name, domain, and workgroup settings area, click Change settings.
- 3. Under the **Computer Name** tab, click the **Change** button.
- 4. On the following window, click **Domain** under the **Member of** section.



- 5. Enter the domain name in the Domain field; then click the **OK** button. This domain name will be the domain name that is used by Dispatcher Phoenix.
- 6. In the Windows Security pop-up window, enter the user name/domain name of the user that is authorized to use domain computers; then select the **OK** button.



- 7. If successful, a Welcome message will appear.
- 8. Restart your PC.

Register the External Server in the MFP

Follow these steps:

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Access Administrator Settings

- 1. At the MFP, press the **Utility** key.
- 2. Touch Administrator Settings and enter the Administrator Password from the keyboard or keypad; then touch OK.



Specify the DNS domain name

- 1. Go to Network Settings > TCP/IP Settings.
- 2. Tap on **DNS Domain** to configure the DNS Domain with your desired domain.
- 3. Tap on the **Default DNS Domain Name** field to bring up keyboard and enter a domain name.
- 4. Tap OK when done.

Set External Server Settings

1. Go to Administrator Settings > User Authentication/Account Track; then click on External Server Settings.



2. Tap the **New** button to define a new external server. The following screen will appear:



- 3. Tap on the Server Name button; then enter the literal name of the Active Directory Domain Controller.
- 4. Tap the Server Type button; then choose Active Directory.

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5. After choosing Active Directory, you can enter the default domain name (make sure it is the full domain name).



- 6. When done, tap the **OK** button. The new external server will now appear in the list.
- 7. Tap the **Close** button.

Enable User Authentication

Ensure that the MFP's User Authentication has been enabled to authenticate against Active Directory.

1. Go to General Settings > User Authentication.



2. Tap on the User Authentication button; then enable the **On (External Server)** option.



- 3. When you are done, tap the $\boldsymbol{\mathsf{OK}}$ button.
- 4. When the "Are you sure you want to clear all data" message appears, tap Yes to clear Data.
- 5. Tap the ${f Close}$ button three times.

Now the Log In screen should appear on the MFP.

Configure Dispatcher Phoenix For Single Sign-On

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Launch Dispatcher Phoenix and register the MFP to authenticate with Active Directory authentication. These steps assume that an MFP has already been registered. Follow these steps:

- 1. Launch the MFP Registration Tool (Tools > MFP Registration Tool option on main application screen).
- 2. On the MFP Registration Tool, edit the MFP's authentication options by selecting the MFP in the list; then clicking the **Edit** button.
- 3. On the Edit MFP window, select the Authentication tab; then choose the **Use MFP provided user name to log in** button. Make sure that the correct domain name appears in the Windows Domain field.
- 4. Click the **Save** button when you are done.

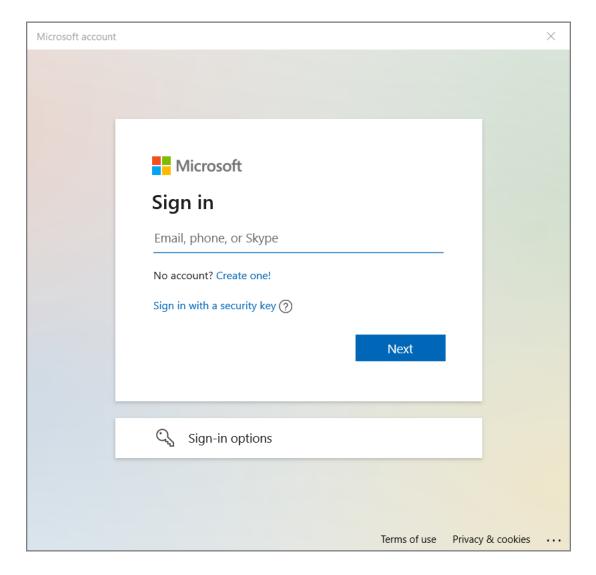
Run Your Dispatcher Phoenix Workflow

Make sure that your Dispatcher Phoenix workflow is running; then, log into the MFP with your MFP user name and password. You will be able to access your Dispatcher Phoenix workflow without having to log into Dispatcher Phoenix again.

Configuring a Microsoft Login

Dispatcher Phoenix supports Microsoft login. To configure a Microsoft login with Dispatcher Phoenix, do the following:

- 1. Go to **Settings > Accounts**. This will open the "Your info" page.
- 2. Select Sign in with a Microsoft account instead.



- 3. Enter your Username and Password, if needed.
- 4. Enter the sign-in code from Microsoft.

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- 5. Enter the password for your computer.
- 6. Create a PIN. This will return you to the "Your info" page.

Configuring an Entra ID Login

Dispatcher Phoenix supports Microsoft Entra ID (formerly Azure AD) logins. To configure an Entra ID login with Dispatcher Phoenix, do the following:

- 1. Go to Settings > Accounts > Access work or school.
- 2. Click Connect. This will open the Microsoft Account window.
- 3. Click Join this device to Microsoft Entra ID at the bottom of the window.
- 4. Enter your Username and Password.
- 5. Confirm you are connecting to the correct organization. Click Join.
- 6. Click **Done**. This will return you to the "Access work or school" page.

Limitations of Using Microsoft and Entra ID

Microsoft logins are not supported by Dispatcher Phoenix for:

• Sharing workflows individually with Microsoft accounts within Dispatcher Phoenix Web

Microsoft and Entra ID logins are not supported by Dispatcher Phoenix for:

- User group permissions within Batch Indexing
- Workflow Cluster Service credentials

Third Party Licenses

Dispatcher Phoenix uses 3rd Party Licenses for certain features. For an up-to-date list of 3rd Party Licenses used by Dispatcher Phoenix, do the following:

- 1. Open Dispatcher Phoenix.
- 2. In the upper right corner, click the Question Mark icon (🕡 🔻) to open the **Help** dropdown menu.
- 3. Select About Dispatcher Phoenix.
- 4. At the bottom of the About Dispatcher Phoenix window, click the License Information link.
- 5. Click the arrow next to 3rd Party Licenses to see the latest versions of the 3rd Party Licenses used by Dispatcher Phoenix.

List of 3rd Party Licenses

3rd Party License	Version	Copyright
AvalonEdit	4.0.0.6988	2008-2010
Cairo LGPL	2.1	-
Cairo MPL	1.1	-
GCrypt	2.1	1991, 1999
GLib	2.1	1991, 1999
GLibNetworking	2.1	1991, 1999
GMime	2.1	1991, 1999
GPG-Error	2.1	1991, 1999
HarfBuzz	2.1	2010, 2011, 2012
Inno Setup	5.0.4 (u)	1997-2007
Intl	3	2007
Jabber-Net	2.1	2002-2008
JSON-Glib	2.1	1991, 1999
Kofax	16.5	2011

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3rd Party License	Version	Copyright
libffi	2.1	1996-2014
libsoup	2.1	1991, 1999
log4net	1.2.10.0	2001-2006
LuaJIT	5.1/5.2	2005-2017
NotifyIcon for WPF	1.0.4.0	2009
OpenSSL	-	1998-2019
Pango	2	1991
PDFSharp	1.31.1789.0	2005-2009
SharpZipLib	0.85.5.452	2001-2007
XML2	-	1998-2012
ZLIB	1.2.11	1995-2017
ZMQ	3	2007

Last Updated: 1/6/2022, Release 8.0

Troubleshooting

Error Messages

This section lists some of the more common messages that might occur when using Dispatcher Phoenix (error messages listed alphabetically):

Add-In is not responding (unresponsive for %u seconds)

- **Description:** The Dispatcher Phoenix application is unresponsive. This may be due to an underpowered system struggling to handle its total workload.
- **Solution:** Close other applications that may be interfering with Dispatcher Phoenix.

App not installed

- **Description:** This message can appear when setting up the Print to File node. Dispatcher Phoenix will report Microsoft Office or Adobe Acrobat as "not installed" if the application has not been run yet.
- **Solution:** Run the newly installed application(s).

Are you sure you permanently want to delete the icon from favorites?

- **Description:** You are attempting to remove a node from your "My Favorites" group.
- Solution: Select the Yes button to close the message box and continue. To keep the node in your "My Favorites" group, select the No button.

Are you sure you want to remove selected MFP(s) from the node?

- **Description:** You are attempting to remove an MFP from the SMTP In node. This message can appear when you are trying to remove a device that is listed in either the Available MFPs or Selected MFPs area of the window.
- Solution: Select the Yes button to continue with the removal process. To keep the MFP as part of the SMTP In node, select the No button.

blox-xmpp-worker is terminating due to unresponsive Add-In

- **Description:** The Dispatcher Phoenix application is unresponsive. This may be due to an underpowered system struggling to handle its total workload.
- Solution: Close other applications that may be interfering with Dispatcher Phoenix.

Could not obtain exclusive lock on:

• Description: You are trying to collect a file that may be in use by another application or process.

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• **Solution:** Close the application that has the file open. In addition, you can check the properties of the file, making sure that the file is not set to read-only (under Attributes).

Counter end value should be greater than the start value.

- **Description:** On any of the Advanced Bates Stamp counters (Numeric, Alphabetic, or Roman Numeral), you have defined the counter as incremental; however, the specified Start Value is greater than the specified End Value.
- Solution: In order for the counter to increment, the End Value must be greater than the Start Value. Select the **OK** button to close the message box; then redefine the End Value for the counter.

Counter start value should be greater than the end value.

- **Description:** On any of the Advanced Bates Stamp counters (Numeric, Alphabetic, or Roman Numeral), you have defined the counter as decremental; however, the specified End Value is greater than the specified Start Value.
- Solution: In order for the counter to decrement, the Start Value must be greater than the End Value. Select the **OK** button to close the message box: then redefine the Start Value for the counter.

Disk space usage has reached the specified threshold.

- Description: The maximum usage threshold/hard disk space that was configured on the Options window has been reached.
- Solution: If you receive a warning message about these threshold values being reached, you can do the following:
 - For **memory warnings**, free up memory by closing any other applications that are open or stopping a workflow that is taking a lot of memory (for example, an image processing workflow).
 - For hard disk space warnings, free up disk space by deleting temporary files, etc.
 - Additional warnings regarding threshold limits will not appear again until memory usage has gone below the specified threshold again.

Error reading URL

- **Description:** This message can appear when the installation process requires some files that must be downloaded from the Internet and there is a problem with the Internet connection during the download process.
- **Solution:** Confirm your Internet connection and try the installation process again. For your reference, the following packages are downloaded from the Internet if they cannot be obtained from the installation CD:

32-bit Platforms:

- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Windows Installer 4.5 Redistributable
- Microsoft .NET Framework 4.8 (Standalone Installer)

64-bit Platforms:

- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2010 Redistributable Package (x64)
- Windows Installer 4.5 Redistributable
- Microsoft .NET Framework 4.8 (Standalone Installer)

Failed to start the workflow. The workflow contains missing plug-in nodes.

- **Description:** You are attempting to run a workflow that contains missing plug-in nodes. The message box lists the nodes that are missing. The workflow cannot be run until this issue is resolved.
- Solution: Click the OK button to close the message box; then either install the missing nodes or remove them from the workflow before attempting to run the workflow again.

Failed to start the workflow. [Workflow did not pass the validation. You must edit the workflow and fix all validation issues before starting it again.]

- **Description:** You are attempting to run a workflow that has not passed validation yet.
- **Solution:** Select the **OK** button to close the message box; then, edit your workflow in the Workflow Builder to fix the validation issues before attempting to run the workflow again.

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Failed to start the workflow. Workflow can't be started. There is another workflow currently running with SMTP In node.

- **Description:** The SMTP In node can only be in one activated workflow; however you are attempting to run another workflow that also has an SMTP In node. That workflow cannot be run.
- Solution: Select the OK button to close the message box; then, edit your workflow in the Workflow Builder to remove the SMTP In node.

Failed to register the application on this device.

- **Description:** You are attempting to register an MFP to use the MFP Panel node but the bEST Server option was not chosen on the "Select Components" window during installation.
- Solution: You need to reinstall the application and make sure that bEST is selected.

Failed to unregister the application on this device.

- **Description:** You are trying to unregister an MFP from a MFP Panel node and another user has already taken over the registration. When someone takes over the registration, the original user loses the ability to use the application on the MFP and also cannot unregister the device.
- · Solution: To change the status of the device to unregistered, select the Yes button.

If you believe that this message may be in error, due perhaps to the MFP being busy processing at that moment and unable to receive outside commands, select the **No** button and retry the registration.

Failed to unregister the application on this device. This device doesn't have iOption installed or licensed that is required for registering a 'Graphical User Interface.'

- **Description:** You are trying to register an MFP for a MFP Panel node with a 'Graphical User Interface' Panel Appearance setting but the MFP does not have the i-Option installed or licensed.
- · Solution:
 - To automatically switch the Panel Appearance setting to 'Native MFP User Interface' and register the MFP, select the Yes button.
 - To return to the MFP Registration window without making any changes, select the No button.

Language file has been successfully imported.

- Description: This message appears after you have added a new language via the Language Manager.
- Solution: Select the OK button to close the message.

If this counter is locked, it can no longer be reset.

- Description: This is a confirmation message that occurs when you attempt to lock a counter on the Advanced Bates Stamp node.
- **Solution:** If you want to continue with the lock operation, select the **Yes** button. To cancel this operation, select the **No** button. Be aware that when you lock a counter, the counter cannot be reset and you will not be able to unlock the counter again.

License file update required.

- · Description: You are attempting to run the application but your license file must be updated first.
- **Solution:** Because of the new plug-in node framework, your license file must be updated. Go to the License Manager window (available by choosing **License ManageR** from the **Help** pull-down menu on the main application screen). From there, you can choose to automatically or manually update your license file. If you choose to manually update your license file, you must first download it from the **SEC web site**.

Resetting this counter will move the current value back to the original starting value.

- **Description:** This is a confirmation message that occurs when you attempt to reset a counter on the Advanced Bates Stamp node.
- **Solution:** If you want to continue with the reset operation, select the **Yes** button. To cancel this operation, select the **No** button. Be aware that when you reset a counter, the current value will change back to the starting value that you originally specified.

The following MFP(s) are added to the MFP Panel node, but they are not currently registered.

• Description: You cannot save MFP Panel node settings due to a validation error. An MFP that has been added for use with the MFP Panel node has been unregistered.

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- Solution: Do one of the following:
 - Remove the MFP from the **Selected MFPs** area of the MFP Panel node window, or
 - Launch the MFP Registration Tool to re-register the MFP, or
 - Disable the MFP Panel node by unchecking the Enabled box in the MFP Panel node window. This leaves the node unusable but allows for changes to be made elsewhere if necessary.

The workflow cannot be saved because it contains missing plug-in nodes.

- Description: You are trying to save a workflow that contains missing plug-in nodes.
- **Solution:** Install the missing nodes listed in the message or remove them entirely from the workflow so that the workflow can run correctly. You will not be able to save the workflow until this is done.

There are no updates available at this time.

- **Description:** You have selected the **Check for Updates** option from the **Help** menu. You are currently running the latest version of the application. No updates could be found.
- Solution: Click the OK button to close the message box.

There are no new license updates available for your software.

- **Description:** On the License Manager, you have tried to update your license but the license that you specified does not include any updates to your current license.
- Solution: Click the OK button to close the message box; then try updating your license with a different file.

The selected sample document is too small to load into the preview. Please try loading a different sample document.

- **Description:** On the Advanced Bates Stamp node window, you are attempting to upload a sample document that is smaller than ½ inch by ½ inch. This is not supported.
- Solution: Click the OK button to close the message box; then try uploading a larger sample document.

Unregistering this device will cause all workflows associated with this device to stop working.

- Description: Using the MFP Registration Tool, you are attempting to unregister an MFP. This is a confirmation message.
- Solution: Select the Yes button to unregister the MFP device.

Updates are available. Click on Continue to see the list of all available updates.

- **Description:** You have selected the **Check for Updates** option from the Help menu. Updates are available to be installed. Once you click on the **Continue** button, the Add-In Manager will appear, allowing you to install updates.
- Solution: Select the Continue button to launch the Add-In Manager.

Warning: Page X is too large. Max is set to YYYY x ZZZZ.

- **Description:** You are attempting to process a page that is larger than the specified maximum pixel size. By default, nodes are set to 8400 x 8400 pixels (Width x Height).
- Solution: Adjust the maximum pixel size in the node (Advanced Settings > Recognition). The maximum pixel size allowed is 32000 x 32000.

Warning! This workflow does not appear to have completed properly and contains incompletely processed files.

- Description: You are attempting to run a workflow that had previously stopped due to a workflow failure or system error.
- Solution: Do one of the following:
 - To resume running the workflow at the point where it originally stopped, select the **Resume** button, or
 - To delete all files that were being processed at the time the workflow stopped and start the workflow normally, select the Delete button.

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WARNING: You have selected to close the Dispatcher Phoenix application interface while files are being processed in workflows that are not set to run as a service!

- **Description:** You are closing the application when a non-service workflow is processing. A workflow can be marked as a "service" workflow on the Workflow Scheduler, which will allow the workflow to run as long as the PC is on (even if the application is not).
- · Solution: Do one of the following:
 - To stop all non-service workflows after all currently processing files have exited the workflow, select the Finish button.
 - To stop the workflow immediately and delete the files that are currently being processed, select the Kill button.
 - To pause all currently processing non-service workflows, select the **Pause** button.
 - To cancel this close operation and exit the message box, select the Cancel button.

WARNING: You have selected to stop a workflow that is currently processing files!

- Description: You are attempting to stop a workflow that is currently processing files.
- Solution: Do one of the following:
 - To stop the workflow only after the processed files have left the workflow, select the Finish button, or
 - To stop the workflow immediately, deleting any files that are being processed, select the Kill button, or
 - To cancel the stop operation and close the message box, select the **Cancel** button.

Would you like to uninstall all of Dispatcher Phoenix or just some Add-ins?

- Description: You are attempting to uninstall the application using the Windows Control panel.
- Solution: Do one of the following on the confirmation message box:
 - To remove the entire application, select the **Yes** button.
 - To remove specific components of the application, select the No button. You will return to the Add In Manager.

You are editing a workflow that contains missing plug-in nodes

- Description: You are trying to edit a workflow that contains missing plug-in nodes. This message will appear before the Workflow Builder opens.
- Solution: Install the missing nodes listed in the message or remove them entirely from the workflow so that the workflow can run correctly.

You are exporting a workflow that contains missing plug-in nodes.

- **Description:** You are trying to export a workflow that contains missing plug-in nodes.
- **Solution:** You can continue with the export operation but the workflow will not contain the missing plug-in nodes. Note that even if you install the missing nodes at a later date, their previously defined properties will no longer be available.

You are importing a workflow that contains missing plug-in nodes.

- **Description:** You are trying to import a workflow that contains missing plug-in nodes.
- **Solution:** You can continue with the import operation but the workflow will not contain the missing plug-in nodes. Note that even if you install the missing nodes at a later date, their previously defined properties will no longer be available.

You are pasting a workflow that contains missing plug-in nodes.

- **Description:** You are trying to paste a workflow that contains missing plug-in nodes.
- **Solution:** If you choose to continue with the paste operation, the missing node properties will not be included and the workflow may not run properly. Note that even if you install the missing nodes at a later date, their previously defined properties will no longer be available.

You are scheduling a workflow that contains missing plug-in nodes.

- **Description:** You are trying to schedule a workflow that contains missing plug-in nodes.
- **Solution:** You will not be able to schedule the workflow until the missing nodes are either installed or removed from the workflow. To continue with the scheduling operation, select the OK button on the message box; then reinstall or remove the missing nodes.

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You are trying to cut/delete an element that exists multiple times on a page and/or on multiple pages.

- Description: This message can appear when you have pasted a node using the Paste Original option and then tried to delete it.
- Solution: Do one of the following:
 - Select the **Delete** button to delete the selected node.
 - Select the **Delete All** button to delete all instances of the node.
 - Select the **Cancel** button to exit the message box without taking any action.

Your additional input license has been successfully activated.

- Description: This message appears after you have updated your license for additional inputs.
- Solution: Close the message box by selecting the OK button.

Your license has been successfully updated. The application must be restarted before the newly licensed nodes are fully functional.

- Description: This message appears after you have updated your license for a new node.
- **Solution:** Close the message box and restart the application to access the full functionality of the newly licensed node. Once this message box is closed, the Add-In Manager will automatically launch to install the newly licensed nodes.

General

Issue: My workflow displays the following image instead of a node:



Solution: Your workflow contains a node that is currently uninstalled or unlicensed. You must either install/activate the 30-day demo node by double-clicking on the node, activate a license for the missing node, or remove the node from the workflow in order to edit or save the workflow.



Issue: My workflow displays a red broken puzzle piece on top of the node image, as in the following illustration:

Solution: You have imported a workflow that has an uninstalled/unlicensed node with a customized image. You must either install/activate the 30-day demo node by double-clicking on the node, activate a license for the missing node, or remove the node from the workflow in order to edit or save the workflow.

Issue: I received one of the following messages:

Failed to connect to workflow services...no connection could be made because the target machine actively refused

or

Please make sure that the workflow services are properly running on this system. Error: ConnectionRefused

Solution: These messages indicate that the Windows Service called "SEC Workflow Services" is not running.

You can try starting the SEC Workflow Services. From the Windows Control Panel, click on Administrative Tools > Services to access the Services window.

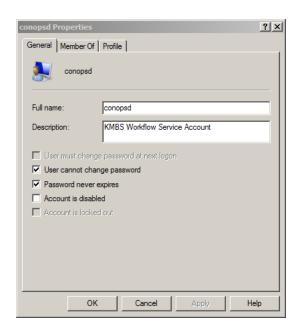
Or, there may be some issues with the 'conopsd' user (the SEC Workflow Services is set to run as 'conospd').

- First, verify that the 'conopsd' user is not locked by following these steps:
 - 1. Click on the Windows Start button; then right click on Computer and select the Manage option.

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- 2. When the Computer Management window opens, click on the Local Users and Groups item to expand it.
- 3. Click on Users; then right click on conopsd and select the Properties item.
- 4. On the conopsd Properties window, make sure that the Account is disabled and the Account is locked out options are left unchecked, as in the following illustration:



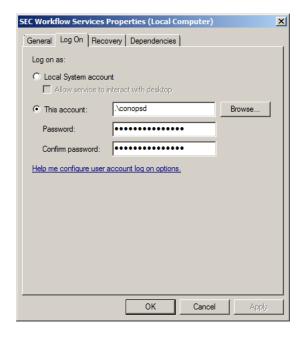
- 5. Verify that the 'conopsd' user (which the SEC Workflow Services is set to run as) is not locked.
- Another problem might be with mismatched passwords. The SEC Workflow Services is set to run as the ".\conopsd" user. For this to happen, Windows needs to have stored the correct password for the conopsd user. If that password has changed, SEC Workflow Services running as that user must be updated as well. If there are pending updates to the Workflow Services, it would help to ensure that the conopsd user's password matches what is on file for the service. Follow these steps:
 - 1. On the Computer Management window, click on Users; then right-click on conopsd and select the Set Password option.

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2. Click Proceed on the warning message that appears; then enter and confirm a new password in the Set Password for conopsd window, as in the following illustration.



- 3. Go back to the Computer Management window and click on the Services and Applications item.
- 4. Click on Services; then right-click on SEC Workflow Services.
- 5. Select the Properties option and then click on the Log On tab.
- 6. Enter and confirm the new password for SEC Workflow Services that matches the password that you just created for conopsd, as in the following illustration:



Installation/Registration

 $\textbf{Issue:} \ \mathsf{During} \ \mathsf{installation,} \ \mathsf{the} \ \mathsf{following} \ \mathsf{message} \ \mathsf{appears:}$

Some features of this node may not work correctly without Microsoft.NET Framework 4.8 or greater. You should install the framework from Windows Update or download it from the Microsoft web site.

Solution: The specified framework is necessary to ensure that all features of a particular node work correctly. Update your system by downloading Microsoft.NET Framework 4.8 or greater from Windows Update or the Microsoft web site (www.microsoft.com).

Issue: Installation error 1935 occurs.

Solution: This error occurs when certain third-party dependencies cannot be found. Dispatcher Phoenix runs the installers of the following third-party dependencies:

- Windows Installer 4.5 Redistributable
- Windows Management Framework Core package (Windows PowerShell 2.0)
- Microsoft .NET Framework Version 2.0 Redistributable Package

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- · Microsoft .NET Framework 3.0 Redistributable
- Microsoft .NET Framework 4.8 (Standalone Installer)
- Microsoft Visual C++ 2005 Redistributable Package
- Microsoft Visual C++ 2008 Redistributable Package
- Microsoft Visual C++ 2010 Redistributable Package

If there is a problem with any of these packages, please contact Microsoft for more troubleshooting information.

Issue: When registering the product, I receive the following error message:

Registration Failed! Cannot register the product because the purchase code has no licenses remaining.

Solution: This error may occur because you are trying to register using a purchase code that has a deactivated license. You should do the following:

- 1. Select the OK button on the message window to close the message.
- 2. Select the Back button to return to the main Register Dispatcher Phoenix window.
- 3. Select the License Transfer button on the bottom of the window.
- 4. You will need your Deactivated Unlock Code and Purchase Code to activate your license transfer.

Issue: When installing the application on a system that also has the Corporate Announcements application installed on it, I receive the following error message:

Setup has detected Microsoft PowerShell 1.0 on this system, but Dispatcher Phoenix requires PowerShell 2.0 or greater. Please uninstall Microsoft PowerShell 1.0 and then try running this installer again.

Solution: Instructions for Windows 8 and above: To properly uninstall PowerShell 1.0 from your system, do the following:

- 1. Open Programs and Features by clicking the Start button, clicking Control Panel, clicking Programs, and then clicking Programs and Features.
- 2. Open the Installed Updates screen by clicking View installed updates.
- 3. Find installed updates with the following Knowledge Base article number: KB968930
- 4. You should see:
 - "Windows PowerShell 1.0 (KB968930)"
 - "Windows Management Framework Core (KB968930)"
- 5. Uninstall both updates.
- 6. Reboot the system.
- 7. Start the installation process again.

Login

Issue: I'm trying to log into Dispatcher Phoenix and it keeps denying me access when my password is blank.

Solution: For users with blank passwords, by default Windows only allows authentication from the Welcome screen. To allow other applications like Dispatcher Phoenix to act on your behalf when you have a blank password, you must change your computer's security policy for blank passwords. This can be done by editing the Local Security Policies on your computer.

For Windows 10

- Go to Start > Control Panel > System and Security > Administrative Tools.
- Double-click the Local Security Policy application.
- $\bullet \ \mbox{Navigate to Security Settings} > \mbox{Local Policies} > \mbox{Security Options}. \\$
- · Locate the policy named: "Accounts: Limit local account use of blank passwords to console logon only".
- Disable this policy for Dispatcher Phoenix to support user accounts with blank passwords.

Issue: My Windows User Profile does not have a password and I cannot connect to Workflow Services. I'm receiving an authentication error.

Solution: You must update a security policy on the computer to allow for blank passwords for non-console logon. Do the following:

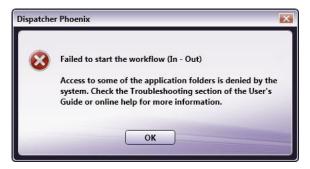
- 1. Click on the Windows Start button and search for secpol.msc.
- 2. Launch the secpol.msc program.
- 3. On the Local Security Policy window, click on the Local Policies item underneath Security Settings (left-hand side).

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- 4. Click on Security Options.
- 5. Right-click the 'Accounts: Limit local account use of blank passwords to console logon only' in the Policy list; then select Properties.
- 6. Click the Disabled radio button; then select the Apply button.

Running Workflows

Issue: When running workflows, I receive a "Failed to start the workflow (In-Out)" error message, as shown in the following illustration:



Solution: The Workflow Engine cannot access the following directory that is used to store workflows (per user):

%appdata%\Konica Minolta\Dispatcher Pro Phoenix Edition\data

The current user will have read/write access to this folder by default. You should change the permissions of this directory to allow, at a minimum, read access to the 'conopsd' user profile

Issue: My scheduled workflows are no longer running correctly after changing the time zone settings on my PC.

Solution: Make sure that you reboot your system after changing the time zone settings to ensure that the Workflow Scheduler will work correctly.

Firewall / Device Connection

Issue: I cannot connect to a network drive/printer/FTP server/send email.

Solution: Third-party firewall applications, including some anti-virus software, may block ports that are used by Dispatcher Phoenix nodes. If a device fails to connect or mail fails to send, check the workflow log for a message similar to the following:

"[Warning][SMTP user@mail.com]Connection failed to SMTP server mail.com:25"

For reference, the default access ports are listed below. Note that many of these ports may be set manually by an administrator, so the values may differ from this list.

MFP Panel: 50808

• MFP Panel (SSL): 50809

• FTP: 21

• FTP (passive mode): (Server-defined)

KMBS MFP: 59158

• KMBS MFP (SSL): 59159

• Printer - LPR: 515

• Printer - RAW: 9100

• SMB/CIFS (Windows shares): (Numerous)

• SMTP: 25

To allow the device to function properly, please consult your firewall application documentation to either stop blocking the affected port or to allow access by the workflow engine process, "blox-erl.exe."

Inputs

Issue: I have scanned documents as emails for use in my workflow but the emails were not received by the SMTP In node.

Solution: Check to see if your MFP is configured to send email over TLS (encrypted). The SMTP Service does not currently support the TLS option.

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Processes

Issue: The number of pages in merged files differs from file to file.

Solution: The number of files does not necessarily equal number of pages. Files containing multiple pages will cause some merged files to contain more pages than others. To ensure equal number of pages, it is recommended to run a Split process on files prior to merging.

Issue: What image formats are supported for image processing?

Solution: Dispatcher Phoenix uses Windows Imaging Components (WIC) and, therefore, supports all image formats supported by WIC. These namely include .bmp, .gif, .jpg, .png and .tif.

WIC can support additional image formats through image codecs. As a result, Dispatcher Phoenix can potentially support additional formats. It should be noted that any additional image formats will likely not have been tested, so results may vary from that of the default image formats.

Issue: The Print to File node does not work.

Solution: Make sure that your system has the latest Windows updates and Adobe Acrobat updates installed.

Issue: My workflow's activity log lists a "[Print to File] File type not supported" message.

Solution: Files that do not include a file extension will not be processed by the Print to File node. If a previous Rename process either positioned the file extension anywhere other than at the end of the file name or removed the extension altogether, the file will not be processed by Print to File.

Make sure that all files being processed by the Print to File node include a file extension at the end of the file name.

Issue: When converting an image using the Convert to Office node, the output file appears with a file type of "Office Open XML Document" in Windows Explorer.

Solution: If the Microsoft Office application that you are trying to convert to is not currently installed on your system, output files may appear with a different file format, such as XML Document.

Issue: I cannot view color TIFF files generated by my workflow using Microsoft Office Document Imaging.

Solution: You will not be able to use Microsoft Office Document Imaging to view color TIFF generated by the following nodes: Advanced Bates Stamp, Annotate, Deskew, Despeckle, Mirror Image, Negative Image, Split, Watermark, and Merge. It is recommended that you use another application, such as Windows Photo Viewer or Paint, to view the generated file.

Issue: I am experiencing intermittent delays when cycling through pages of my sample document in the Preview area of the Advanced OCR, Barcode Processing, or 2D Barcode Processing nodes.

Solution: Make sure that your sample document is not being loaded from a network share.

Issue: The Print to File node failed to process every other PDF file when using Adobe Reader, Version 11.

Solution: Uncheck the option for "Enable Protected Mode at startup" in Adobe Reader's Preferences (Edit > Preferences > Security (Enhanced)).

Issue: A warning error is logged when running my workflow, similar to the following:

There are more objects in this XRef table than specified in the size key of the trailer directory!

Solution: No action is required. The PDF Support Library is reporting a perceived error about the format of the PDF document. Files are still processed correctly.

Issue: Merge is not working for multiple pages scanned from the MFP as TIFFs.

Solution: The application is working as designed. Multiple-page documents scanned as TIFF from the MFP will result in one file. If you scan 5 pages as a TIFF and then scan another 3 pages as a TIFF, two jobs will be produced (each scan is considered a different job). Merge is only designed to support merging files in the same job.

When scanning multiple page documents from the MFP as JPEGs, one file for each page is produced in one job (JPEGs do not support saving multiple pages into one file).

Outputs

Issue: When using the Box Connector and WebDAV Connector, I am receiving error messages that have error codes in them. What is the purpose of those error codes?

Solution: Those codes are service-generated and can be useful when communicating with either Box or the WebDAV vendor during trouble-shooting.

Issue: When using the Box Connector, I receive a "Failed to login. Authentication Failed" error message.

Solution: This message appears after you have entered invalid credentials more than once in a short period of time. Do the following:

1. Log into your Box.com account on a Web Browser.

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- 2. If you are required to enter reCAPTCHA information, try changing your password.
- 3. If the reCAPTCHA test still appears after resetting your password, contact Box Customer Support to have them remove the CAPTCHA flag from your account.

Issue: When using the SharePoint Connector, I receive an "Already checked-out" warning message.

Solution: This message appears for one of the following reasons: • The file may already be checked out. Make sure that the file is not already checked out. • The destination URL does not match the SharePoint site. If trying to communicate with SharePoint under an unregistered IP address or host name, you should talk to your SharePoint administrator to update your settings or server to support the way you're trying to connect.

Printing from Workflow Builder

Issue: The Workflow Builder does not print my workflow at the saved paper size.

Solution: Printing on anything other than the default print driver paper size requires a manual selection by the user. To print on different size paper, select the desired paper size when the print driver settings are launched at time of printing. Workflow Builder will automatically scale the image to this new size.

Sample Workflows

Issue: The sample workflows that come with the application may be out-of-date.

Solution: To import sample workflows into your Workflow List, follow these steps:

- 1. Delete the existing sample workflows.
- 2. Select the Import Sample Workflow option from the Tools drop-down menu.
- 3. On the Import window that appears, double-click on the sample workflow that you are interested in, or select the All Samples.wfxp file to import all sample workflows into the Workflow List area.
- 4. On the Import Wizard window that appears, select the Import button; the workflow(s) will automatically be loaded in the correct folder in the Workflow List.

For the latest sample workflows, please check our Online Samples library (accessed by clicking on the icon (4) on the main application screen's tool

MFP Panel Node and MFP Registration

Issue: My workflow no longer works on the MFP panel.

Solution: This issue could derive from a number of issues:

- Your MFP may have been unregistered. Use the MFP Registration Tool to re-register the MFP.
- Your MFP application may have been taken over by another user. This could occur if the other user used the same name for the application which appears on the MFP panel and chose to take over your registration rather than rename their application. Use the MFP Registration Tool to change the status of your MFP to unregistered. Then re-register your application using a different name.
- You may have exceeded the number of active inputs licensed for your installation of Dispatcher Phoenix. While the visual appearance of a workflow may show a single input, MFP Panel nodes can have multiple MFPs allocated within them. Each one of these MFPs counts as one input against the license count. Try removing excess MFPs from within the MFP Panel node to correct this inequality. You can also purchase additional Dispatcher Phoenix licenses to increase your available active inputs.

Issue: When trying to access my workflow, the following message appears even after enabling the "Don't show this message again" option:

"This page is protected. Information will be encrypted for sending and receiving."

Solution: To keep the message from reappearing, do one of the following:

- Install firmware on the MFP that supports OpenAPI 3.7. Once installed, registering the application on the machine will register the SSL certificate for the bEST server, at which point you will no longer be prompted for the certificate.
- Using the MFP control panel's web browser, visit another site with SSL and enable the "Don't show this message again" option on the similar message that will appear.

Issue: I received the following message:

Failed to Register the Application on this device - Failed to get device details.

Solution: The MFP's Open API Settings may be disabled. Do the following to correct this:

- 1. On the MFP's control panel, log in as Administrator.
- 2. Press the System Connection button.

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- 3. Press the Open API Settings button.
- 4. Press the Access Setting button.
- 5. Make sure that "Allow" is selected, not "Restrict."

Issue: I received the following pop-up message: "Do you want to accept the cookie?"

Solution: To permanently disable this message, do the following:

- 1. Press the Application Menu key to display the Application Menu.
- 2. Touch Web Browser on the Application Menu.
- 3. Touch the Menu button on the toolbar.
- 4. Touch the Settings tab.
- 5. Touch the Cookies option.
- 6. Touch accept; then touch OK.
- 7. Close out of Settings.

Issue: I'm using domain authentication for the bEST Server. When trying to log into Dispatcher Phoenix at the MFP, the following message appears: "No workflows found."

Solution: You may have entered the wrong domain name in Dispatcher Phoenix, or you may have changed domains. Check to make sure that the correct domain name is specified for user authentication in Dispatcher Phoenix by doing the following:

- 1. Launch the MFP Registration Tool (Tools > MFP Registration Tool).
- 2. Select the MFP from the list; then click on the Edit MFP button.
- 3. Select the Authentication tab.
- 4. Make sure that the third option is selected and the Windows Domain field contains the correct domain name.

Issue: I receive the following message about Certificate Security Credentials when accessing my Dispatcher Phoenix workflow on the MFP:

Certificate Security credentials could not be verified. Do you want to continue?

If I do not quickly touch the Yes button, I cannot access my workflows.

Solution: To prevent this message from appearing, you should turn off SSL for OpenAPI on the MFP. Do the following:

- 1. Go the MFP's web page; then log into the MFP as Administrator.
- 2. Select the Network tab/button.
- 3. Click the OpenAPI Setting option on the left-hand side of the screen
- 4. On the OpenAPI page, select the Non-SSL Only option from the Use SSL/TLS drop-down list.

Issue: The KMBS bEST Server Service does not automatically start on my system after start up.

Solution: This can happen if the bEST service did not start quickly enough for Windows to see that it started successfully. To resolve this issue, you can adjust the bEST service's startup profile by doing the following:

- 1. Open Windows Services.
- 2. Find KMBS bEST server in the list of services; right-click on this item and select Properties.

The KMBS bEST server Properties window opens.

3. Choose Automatic (Delayed Start) from the Startup type drop-down list; then select the OK button.

This will start the bEST server service shortly after the computer starts, allowing the service access to sufficient resources to start up normally.

Issue: The following error is displayed when trying to access Dispatcher Phoenix on the MFP after a firmware update:

Configuration file for this device does not exist. Please register the application again.

Solution: To resolve this issue, do the following:

- 1. Double-check the bEST Server Host Name / IP Address (accessed by clicking on the Defaults button on the MFP Registration Tool).
- 2. Check to see if there is an IP address conflict on the local network.
- 3. Check to see if there is a MAC address conflict on the local network.

MFP Simulator

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Issue: When launching the Interactive MFP Simulator from Dispatcher Phoenix, the following error appears:



Solution: This error occurs when the bEST Services have stopped running. Do the following:

- 1. Open Windows Services.
- 2. Scroll down the list until you find and select KMBS bEST Server.
- 3. Start this service.

SHA-1/SHA-256 Certificates

Issue: An error message either at the MFP or within the MFP Panel node appears due to communication failure between the two devices, or you receive an error on the MFP panel about failing to connect to the workflow.

Solution

Check to see if the MFP is using a SHA-1 Certificate. SHA-1 Certificates are no longer supported in a Windows environment, so the SHA-1 Certificate for bEST-Server will need to be converted to SHA-256. If this is the case, then follow the steps below to manually update the SHA-1 Certificate to SHA-256:

Perform the following procedure to update the SSL Certificate that bEST is using from SHA-1 to SHA-256:

- 1. Unregister all MFPs using the MFP Registration Tool.
- 2. Launch a Windows Command Prompt as Administrator (Run as Administrator).
- 3. Stop the bEST Server by entering the following command: net stop tuscon
- 4. Update SSL Certificate by following these steps:
 - a. Enter the Following command: cd "\Program Files\Konica Minolta\tuscon"

To remove this error message, the bEST Server version 3.9.3, includes a utility program called "peoria.exe" that will generate a SHA-256 certificate for the bEST Server:

b. Enter the Following command: peoria.exe -r -sha256

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This utility program (peoria.exe) will generate a SHA-256 Certificate for the bEST Server.

- 5. When done, re-start the bEST-Server by entering the following command: net start tuscon
- 6. Re-register all devices using the MFP Registration Tool.

This only updates the certificate for the server running on Windows. To update the certificate on Konica Minolta devices with a SHA-256 certificate, please consult the related user manuals. If you are still unable to make this work, contact your authorized Konica Minolta technician to help upgrade the certificate to SHA-256.

Activity Logs

Issue: I cannot open an edited log viewer file.

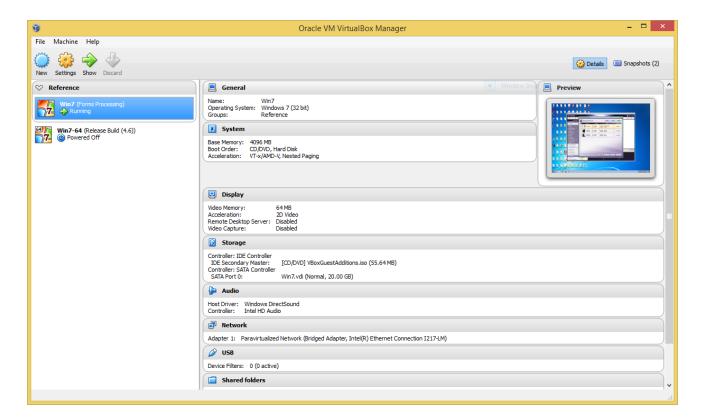
Solution: If you have the Windows' option of Hide Extensions for known file types enabled, it will be necessary to select a program before the file can be opened if you have edited the file name of the exported log. Once this option has been disabled, the file can be automatically opened even after the file name has been edited.

Using Dispatcher Phoenix With Virtual Machines

A Virtual Machine that is not on the same network as the MFP can still use Dispatcher Phoenix. To use Dispatcher Phoenix with an MFP in a NAT (Network Address Translation) environment with a Virtual Machine, in this case VirtualBox, follow these steps:

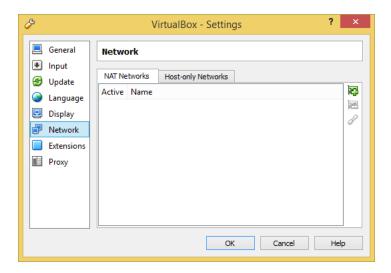
Note: Before beginning, make sure you have the latest version of Dispatcher Phoenix installed.

1. Start the VirtualBox Manager. See the following illustration for an example:



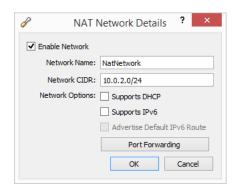
- 2. On the VirtualBox Manager window, select the **Preferences...** option from the **File** menu.
- 3. On the VirtualBox-Settings window, choose **Network** from the left hand side of the window, as in the following illustration:

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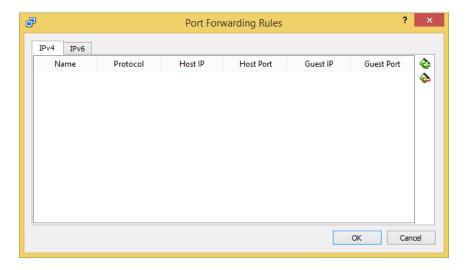
- 4. Click on the Add button to add a new NAT Network entry to the list.
- 5. Edit the new NAT Network by doing ONE of the following:
 - Double click on the entry in the list.
 - Select the entry; then click on the **Edit** button.
- 6. On the NAT Network Details window, make sure the fields have the following settings:
 - Network Name NatNetwork
 - Network CIDR: 10.0.2.0/24
 - Supports DHCP Disabled
 - Supports IPv6 Disabled

See the following illustration for an example of what the window should look like:



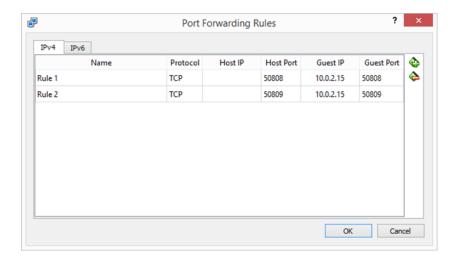
7. When you are done, select the **Port Forwarding** button. The following window will appear:

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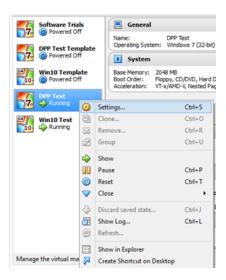
- 8. Click on the **Insert New Rule** button two times to create two new entries as follows:
 - The **Host Port** and **Guest Port** for Rule 1 must be 50808.
 - The Host Port and Guest Port for Rule 2 must be 50809.
 - The **Guest IP** address can be whatever you choose; however, make sure you remember it since you will need it when setting up the Guest Machine.

See the following illustration for an example:

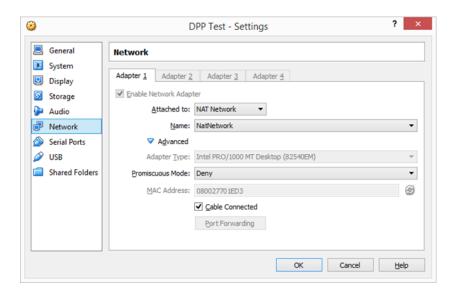


- 9. Select the **OK** button on all active windows.
- 10. Right-click on the guest machine listed in the VirtualBox Manager; then choose the **Settings** option. See the following illustration for an example:

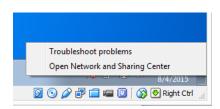
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11. On the Settings window, select **Network**. See the following illustration for an example:

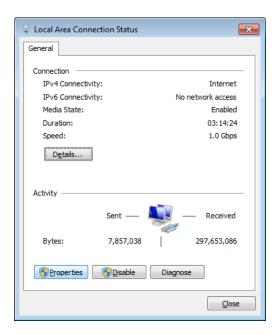


- 12. On the Network tab, do the following:
 - 1. Select the **NAT Network** option from the **Attached to:** drop-down list.
 - 2. Make sure the **Name** entry matches the one you created.
 - 3. Select the **OK** button to save your settings.
- 13. Start up the Guest Machine.
- 14. Right-click on the Network Icon in the System Tray; then select the Open Network and Sharing Center option.

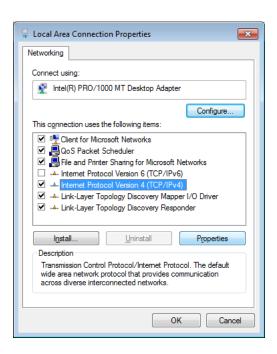


15. In the Network and Sharing Center, click on the **Local Area Connection** link. The Local Area Connection Status window will appear, as in the following illustration:

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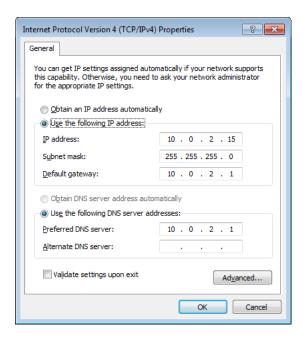
- 16. On the Local Area Connection status window, select the **Properties** button. The Local Area Connection Properties window will appear.
- 17. Click on the Internet Protocol Version 4 (TCP/IPv4) entry; then select the Properties button, as in the following illustration:



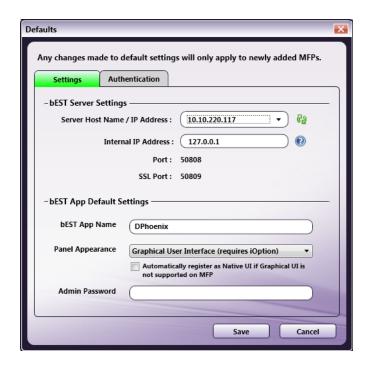
- 18. On the Internet Protocol Version 4 (TCP/IPv4) Properties window, do the following:
 - 1. Select the Use the following IP address radio button.
 - 2. In the ${\bf IP}$ address field, enter the ${\bf IP}$ address that you specified in step #8.
 - 3. In the **Default gateway** field, enter the first three digits of the IP address with a last number of 1.
 - 4. In the Preferred DNS server, enter the first three digits of the IP address with a last number of 1.

See the following illustration for an example:

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- 19. Select the **OK** button on all active windows to save settings.
- 20. Make sure the adapter connects successfully.
- 21. Launch Dispatcher Phoenix and open the MFP Explorer Tool.
- 22. On the MFP Explorer Tool, select the **Defaults** button.
- 23. On the Defaults Settings window, make sure that the value in the **Server Host Name / IP Address** field is the externally visible IP address of the NAT Server.
- 24. Press Ctrl+Shift+D to display the Internal IP Address field, as in the following illustration:



- 25. Make sure the Internal IP Address is set to 127.0.0.1.
- 26. Select the **Save** button to save your changes.
- 27. The Auto-Discovery tool will not find any printers. Select the Add MFP button to add MFPs manually by IP address.

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Production Print

Issue: Cannot continue with the workflow after reloading paper after a misfeed on a Production Print machine

Solution: If a misfeed happens, you must select the "Open and close ADF paper tray" option and perform that action. There is a warning that is displayed on the MFP indicating this. If you navigate away from the error message, the warning can be found under the "Copy" tab.

Tutorials

Bates Stamping at the MFP Panel

This tutorial demonstrates how the Advanced Bates Stamping process has been expanded to allow for the creation/modification of new or existing Bates stamps directly from the MFP panel.

Background: A law firm needs to apply a unique identifier (client ID) to each page of their incoming documents. They are looking for an alphanumeric stamping solution that will eliminate their current manual process. In addition, the format of the unique identifier may change based on the documents that are being scanned at the time and they would like the flexibility of creating a new Bates stamp, with advanced formatting features and content, while at the MFP panel.

Overview Of Tutorial: With Dispatcher Phoenix, you can create a Bates stamping workflow that can be run and modified directly from the MFP panel. All of the features and functionality found in Dispatcher Phoenix's Advanced Bates Stamp node can now be accessed and used at the MFP panel. In this tutorial, you will do the following:

- 1. Create a Dispatcher Phoenix workflow that receives documents from a bEST-enabled MFP, applies a Bates stamp, and distributes the processed files to a folder on your Desktop.
- 2. Modify the existing Bates stamp from the MFP panel.
- 3. Create a new Bates stamp from the MFP panel.

Before Starting: Before creating this workflow, do the following:

- 1. Create an output folder on your Desktop called 'out.'
- 2. Register an MFP to be used in this workflow.
- 3. Configure your bEST server settings.

Steps To Take: This tutorial involves the following steps:

- 1. Open the Workflow Builder
- 2. Configure the MFP Panel Node
- 3. Configure the Output Folder Node
- 4. Configure the Advanced Bates Stamp Node
- 5. Connect the Nodes
- 6. Validate the Workflow
- 7. Run the Workflow
- 8. Access the Workflow at the MFP
- 9. Access the Bates Stamp at the MFP
- 10. Customize the ClientID Stamp
- 11. Add Another Stamp to the node
- 12. Run your Workflow

1. Create a Workflow

Your first step is to create a workflow by selecting the **New Workflow** icon on the main application screen's toolbar. This will open up the Workflow Builder. In the Canvas Properties palette on the right-hand side of the window, enter an appropriate name for the project in the **Project Name** field (e.g., "Bates Stamping At Panel.")

2. Configure the MFP Panel Node

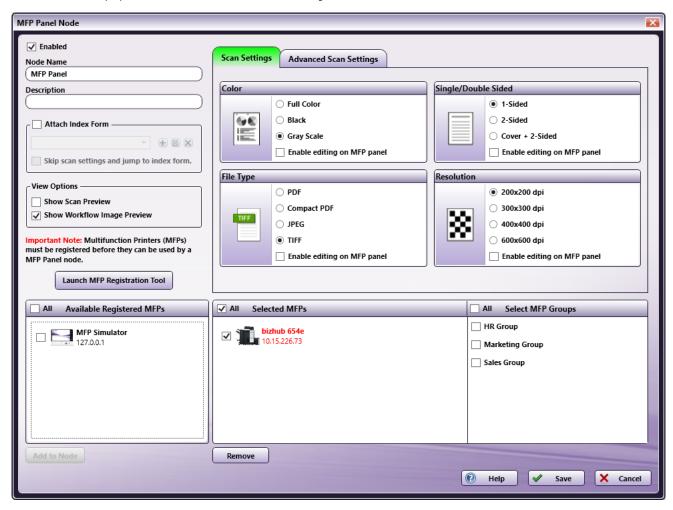
Next, you will need to define a MFP Panel node for the MFP that you will be using for scanning. Drag-and-drop a **MFP Panel Node** onto the Workflow Builder canvas.

Once you double-click on the icon to open up its node properties window, do the following:

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- 1. Enter an appropriate name for the MFP Panel node in the **Node Name** field.
- 2. Make sure that the **Enabled** box is checked.
- 3. Drag the appropriate printer icon from the Available Registered MFP area to the Selected MFPs area.
- 4. Select the **Save** button when you are done.

The MFP Panel Node properties window should resemble the following illustration:



3. Configure an Output Folder

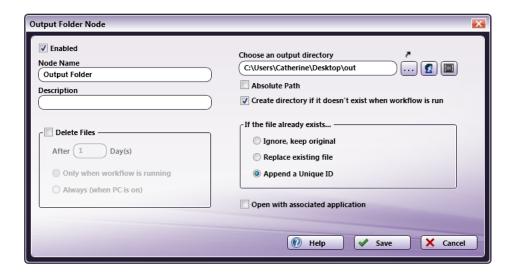
Next, you should define an Output folder to store the files after processing. Drag-and-drop an Output Folder onto the Workflow Builder canvas.

Once you double-click on the icon to open up its node properties window, do the following:

- 1. Enter an appropriate name for the Output Folder in the $\bf Node\ Name\ field.$
- 2. Make sure that the **Enabled** box is checked.
- 3. Select the Append a Unique ID radio button under the If the file already exists... area. This will ensure that all versions of files will be kept.
- 4. Click on the **ellipsis** button (....) next to the **Choose an output directory** field to specify a location for the original files. In the Browse for Folder window that appears next, select the folder entitled 'out' that you created earlier.
- 5. Select the **Save** button when you are done.

The Output Folder Node properties window should resemble the following illustration:

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4. Configure Advanced Bates Stamp Node

Next, you should define an Advanced Bates Stamping process to stamp the incoming files. Drag-and-drop an **Advanced Bates Stamp** node onto the Workflow Builder canvas.

Once you double-click on the icon to open up its node properties window, do the following:

- 1. Enter an appropriate name for the Bates Stamp in the **Node Name** field.
- 2. Make sure that the **Enabled** box is checked.
- 3. Select the Add New button to create a new stamp.
- 4. Use the Add New palette that appears to do the following:
 - Enter ClientID in the Stamp Name field
 - Specify the top middle position using the Default anchor position radio buttons.
 - Choose a layout orientation of **Horizontal**.
 - $\circ~$ Click on the Save button when you are done.

At this point, the "ClientID" stamp appears in the Edit Stamps preview area as an empty bounding box.

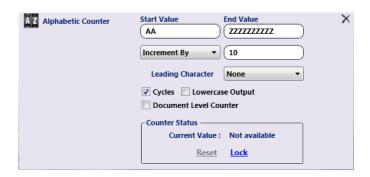
- 5. Specify that you would like the stamps to be placed on the first page of every document by selecting First Page from the Stamp drop-down list.
- 6. In the **Design Components** area of the Advanced Bates Stamp node, drag-and-drop a **Numeric Counter**, and an **Alphabetic Counter** component to the Build Component area.
- 7. Double-click on the **Numeric Counter** icon to customize the counter.
 - Enter 20 as the Start Value using the **Start Value** input field.
 - Increment the stamp by 10 using the Increment By empty input field.
 - $\circ~$ Choose spaces from the Leading Character drop-down list.



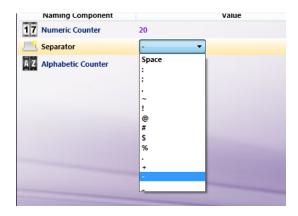
8. Double-click on the Alphabetic Counter icon to customize the counter.

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- Enter AA as the Start Value using the **Start Value** input field.
- $\circ~$ Increment the stamp by 10 using the $\mbox{\bf Increment By}$ empty input field.



9. Define a dash separator between the numeric and alphabetic counters by dragging a **Separator** component and dropping it in between the two counters. Double-click on the Separator and choose a dash from the drop-down list that appears, as in the following illustration:



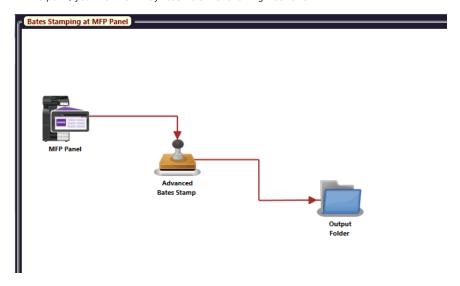
- 10. To edit the Bates stamp on the MFP panel, check the **Enable Editing on MFP** panel box.
- 11. Select the **Save** button when you are done.

5. Connect the Nodes

Next, connect all of the nodes in the workflow.

Use a connector to connect the MFP Panel Node to the Advanced Bates Stamp Node and the Advanced Bates Stamp Node to the Output Folder node.

At this point, your workflow may resemble the following illustration:



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6. Validate the Workflow

To validate the workflow, select the Validate button on the tool bar.

If there are no errors, a message will appear, indicating that the workflow passed validation.

7. Run the Workflow

Next, close the Workflow Builder (File > Exit) to return to the main application screen, and then run the workflow.

8. Access the Workflow at the MFP Panel

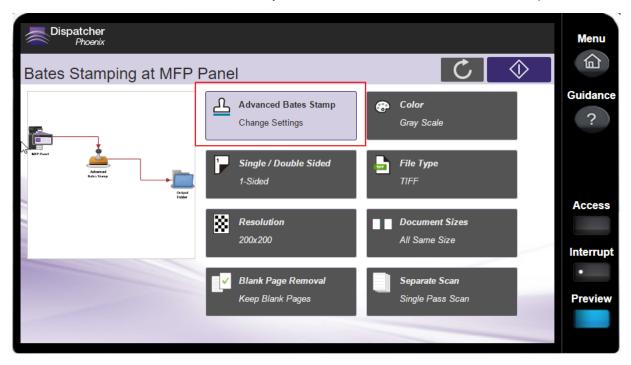
At the MFP you have configured to run this workflow, access your MFP Panel workflow.

Note: You may have to log in to access your workflows (depending on the MFP user authentication options set in Dispatcher Phoenix).

- If you have multiple workflows configured to run on the MFP, a list of available workflows appears along with thumbnail images of each workflow. Tap on the Bates Stamping At MFP Panel icon to access your workflow. The Workflow Details screen appears.
- If you have only one workflow defined for the MFP, the Workflow Details screen will appear immediately once you have logged in.

9. Access the Advanced Bates Stamp Node

At the MFP, the Workflow Details screen displays an image of the workflow and the specified scan settings, and also indicates the nodes in the workflow that can be customized. In this workflow, the only node that can be customized is the Advanced Bates Stamp node.



Tap on the **Advanced Bates Stamp icon** to modify this node. The Node Configuration screen appears.

10. Customize the ClientID Stamp

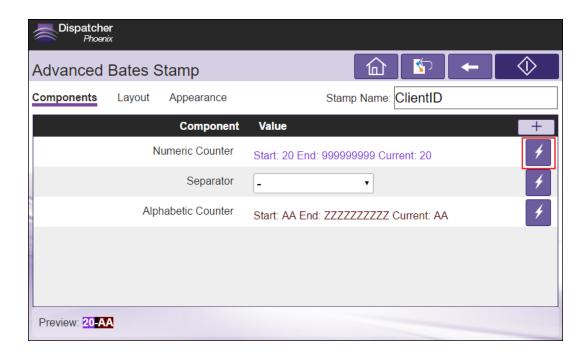
The Node Configuration screen displays the Bates stamps that have been defined for the node. In this workflow, only one Bates stamp was defined ("ClientID") so it is the only stamp listed. On the right hand side, the Preview area displays the stamp location on the page. See the following illustration:

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Do the following:

1. Tap on the **ClientID** button to modify this stamp. The components that you defined earlier for this stamp appear along with their current configurations listed, as in the following illustration:

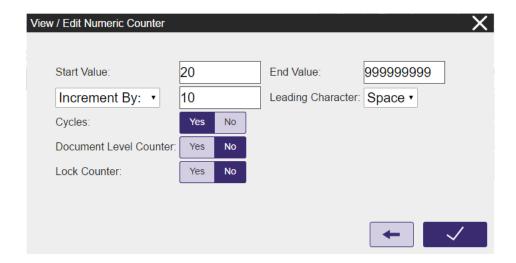


2. To edit the numeric counter, tap on the **Action** button in the Numeric Counter's row, and then tap on the **View/Edit** icon, as in the following illustration:



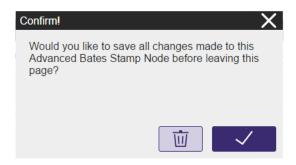
3. The numeric component can now be edited, as in the following illustration:

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For the purposes of this tutorial, change the Start Value from 20 to 10; then tap on the **check mark** button to save your changes and exit the screen

4. Tap on the Save button on the Node Configuration screen. A confirmation message appears, as in the following illustration:



11. Add Another Stamp To The Node

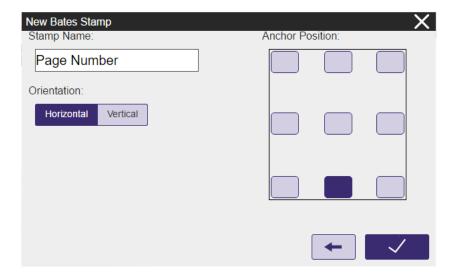
While still at the MFP panel, you can add another stamp to the Advanced Bates Stamp node. For the purposes of this tutorial, add a page number on each page of the scanned documents.

Do the following:

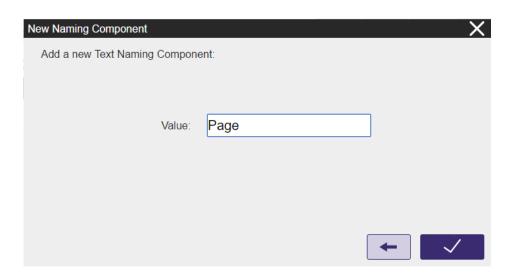
- 1. Tap on the $\mbox{+}$ button on the Node Configuration screen. The New Bates Stamp screen appears.
- 2. On the New Bates Stamp screen, do the following:
 - Enter page number in the **Stamp Name** field.
 - Tap on the middle bottom position in the Anchor Position area to position the stamp at the bottom of the page.
 - Tap on the **checkmark** button to save your changes.

See the following illustration:

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- 3. The View/Edit Component screen will appear for the new 'page number' component. Begin by adding a page number component by doing the following:
 - Tap on the + button to add a new component. The New Naming Component screen appears.
 - On the New Naming Component screen, tap on the Page Number button. The Add a New Page Number Naming Component screen
 appears.
 - Tap on the **checkmark** button on the New Page Number Naming Component screen. The screen closes and you return to the View/Edit Component screen with the new 'page number' component added.
- 4. Next, add 'Page' as static text by doing the following:
 - Tap on the + button to add a new component. The New Naming Component screen appears.
 - On the New Naming Component screen, tap on the **Text** button. The Add a New Text Naming Component screen appears. Type 'Page' in the Value field, as in the following illustration:



• Tap on the **checkmark** button on the New Page Number Naming Component screen. The screen closes and you return to the View/Edit Component screen with the new 'page number' component added.

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5. To move the Text component before the Page Number component, tap on Text's **Action** icon; then tap on the **Move Up One** icon, as in the following illustration:



6. Tap on the Save button. The Node Configuration screen reflects your changes, as in the following illustration:



12. Run Your Workflow

Now you can run your workflow with your modified Bates stamp node. Note that your Bates stamping changes will be reflected immediately in Dispatcher Phoenix.

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Parsing Tutorial

This tutorial demonstrates the powerful application of parsing nodes in Dispatcher Phoenix workflows.

Overview: Legacy Insurance Company prints statement documents from their mainframe computer system. The mainframe produces Postscript files containing all the customer statements. Legacy Insurance Company wants to print the customer statements on white paper and insert a blank blue paper page between each customer statement. The original Postscript files need to be saved in a separate folder. The processed Postscript files are to go to an output folder. Each customer statement has a remittance stub as the last page of the statement, which can be identified by the title text of 'Return Stub' on the page.

Overview Of Workflow: You will be creating a Dispatcher Phoenix workflow to do the following:

- 1. Monitor an input folder for Postscript documents.
- 2. Route non-Postscript files to an error folder.
- 3. Insert Postscript commands in the files to set the media type for each page to white paper and insert a blank page of blue paper after the remittance stub page.
- 4. Route a copy of the original Postscript file into a folder titled 'Originals.'
- 5. Route processed files to the Output folder.

Necessary Desktop Folders: Before you begin creating this workflow, you need to create the following folders on your desktop:

- · An input folder, entitled 'Input'
- · An output folder, entitled 'Originals'
- · An output folder, entitled 'Output'
- · An output folder, entitled 'Error.'

Steps To Take In Creating Workflow: To create this workflow, you need to do the following:

- 1. Open the Workflow Builder
- 2. Configure an Input Folder node
- 3. Configure an Output Folder node to store the original Postscript files.
- 4. Search for the beginning of the page and insert Postscript commands to set the media type for all pages to be white.
- 5. Search for the remittance page and insert Postscript commands to set the media type as blue.
- 6. Search for all files containing the text string of "Return Stub".
- 7. Using the results of the previous search, insert a blank blue page at the end of every statement.
- 8. Create an Output folder.
- 9. Create an Output folder for errors.
- 10. Create connectors to and from nodes.
- 11. Validate the workflow.

1. Create a Workflow

Your first step is to create a workflow by selecting the **New Workflow** icon on the toolbar. This will open up the Workflow Builder. In the Canvas Properties palette on the right-hand side of the window, enter a name for the project in the Project Name field, as in the following illustration:



2. Configure the Input Folder

- 1. First, you need to define an Input Folder that will collect the files to be processed. Drag an **Input Folder** to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:
 - Enable the **Delete on Retrieve** option in the Collection Options area remove the files from the folder after processing.

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- Enter *.ps in the File Filter field so that only Postscript files are collected.
- Click on the **ellipsis** button (....) next to the **Choose an input directory** field to specify a location for the input folder. In the Browse for Folder window that appears next, select the input folder that you created earlier.
- 2. Select the Save button on the Input Folder Node properties window when you are done.

3. Configure an Output Folder to Store Original Files

Next, you should define an Output folder to store the original, unmodified Postscript files. Drag an **Output Folder** to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:

- Select the **Append a Unique ID** radio button under the If the file already exists... area. This will ensure that all versions of processed files will be kept.
- Click on the **ellipsis** button (....) next to the **Choose an output directory** field to specify a location for the original files. In the Browse for Folder window that appears next, select the folder entitled 'originals' that you created earlier.
- Select the **Save** button on the Output Folder Node properties window when you are done.

4. Search for Beginning Of Page/Make All Pages White

The Postscript files must be set up to print on white paper before specifying any other settings. By using the Parse and Insert process node, you can insert Postscript commands at the beginning of each page; these commands will set the weight and color of the media.

- 1. Drag a **Parse and Insert** node to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:
- 2. Enter a name for the process node, such as Search for BeginPageSetup in the Node Name field.
- 3. Enter a description for the process node, such as Makes all pages plain/white paper in the Description field.
- 4. Make sure the **Enabled** box is checked.
- 5. Uncheck the **Match case** box under Search options to ensure that the search criteria is not case sensitive.
- 6. In the Search For area, enter %%BeginPageSetup; then specify Beginning to End in the Search From and To fields.
- 7. Enter the following text in the Insert with area; then specify Beginning of All Occurrences in the Insert at fields.

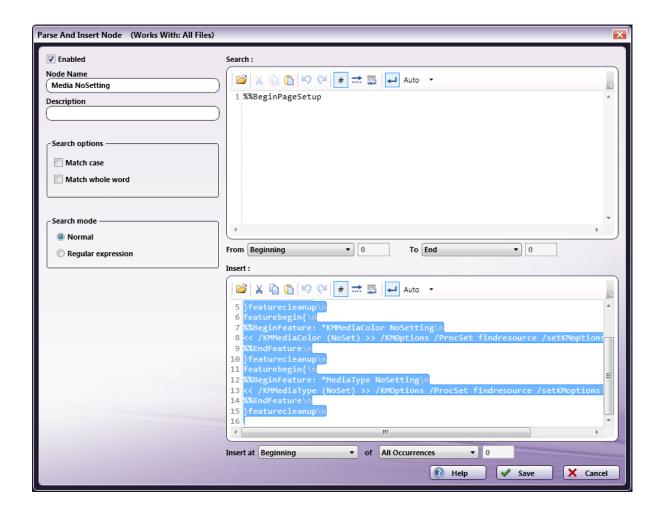
featurebegin{ %%BeginFeature: *KMMediaWeight NoSetting << /KMMediaWeight (NoSet) >> /KMOptions /ProcSet findresource /setKMoptions get exec %%EndFeature }featurecleanup featurebegin{ %%BeginFeature: *KMMediaColor NoSetting << /KMMediaColor (NoSet) >> /KMOptions /ProcSet findresource /setKMoptions get exec %EndFeature }featurecleanup featurebegin{ %%BeginFeature: *MediaType NoSetting << /KMMediaType (NoSet) >> /KMOptions /ProcSet findresource /setKMoptions get exec %%EndFeature }featurecleanup

Note: A blank line at the end of the block must be included.

8. Select the Save button when you are done.

The Parse and Insert properties window should resemble the following illustration:

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5. Search for Return Stub/Insert Make Paper Type Blue Commands

Next, Postscript commands should be inserted after the remittance pages (identified by the text string of Return Stub) specifying that the paper type should be switched to blue. By using the Parse and Insert process node, you can insert Postscript commands after each occurrence of the specified search criteria; these commands will set the color of the media.

- 1. Drag a Parse and Insert node to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:
- 2. Enter a name for the process node, such as Search for Return Stub, in the Node Name field.
- 3. Enter a description for the process node, such as **Makes paper type=blue**, in the Description field.
- 4. Make sure the **Enabled** box is checked.
- 5. Uncheck the Match case box under Search options to ensure that the search criteria is not case sensitive.
- 6. In the Search For area, enter (Return Stub); then specify Beginning to End in the Search From and To fields.
- 7. Enter the following text in the Insert with area; then specify Beginning of All Occurrences in the Insert at fields.

featurebegin{ %%BeginFeature: *KMMediaWeight Thick << /KMMediaWeight (Thick) >> /KMOptions /ProcSet findresource /setKMoptions get exec %%EndFeature }featurecleanup featurebegin{ %%BeginFeature: *KMMediaColor Blue << /KMMediaColor (Blue) >> /KMOptions /ProcSet findresource /setKMoptions get exec

%%EndFeature

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featurebegin {

%%BeginFeature: *MediaType User1

<< /KMMediaType (CustomType) >> /KMOptions /ProcSet findresource /setKMoptions get exec

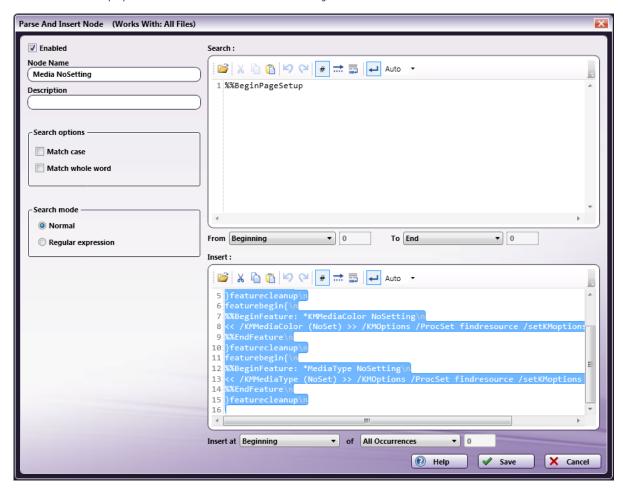
%%EndFeature

}featurecleanup

Note: A blank line at the end of the block must be included.

8. Select the **Save** button when you are done.

The Parse and Insert properties window should resemble the following illustration:



6. Search for Return Stub

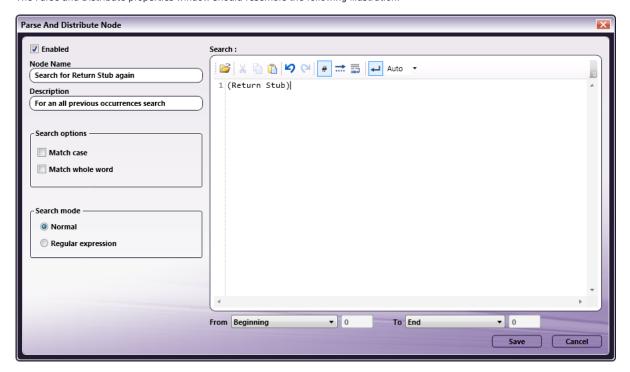
Next, you will search for all files that contain the Return Stub text string in them, using the Parse and Distribute node. This process creates tags within a file that mark the locations of where a keyword or text string is located within the file. This will allow subsequent Parse nodes to work on only the previously searched for text. In other words, the search results of this Parse and Distribute node will be used as the starting point for any subsequent Parse nodes that are configured to search from "all previous occurrences."

- 1. Drag a **Parse and Distribute** node to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:
- 2. Enter a name for the process node, such as Search for Return Stub Again, in the Node Name field.
- 3. Enter a description for the process node, such as For an all previous occurrences search, in the **Description** field.
- 4. Make sure the **Enabled** box is checked.
- 5. Uncheck the **Match case** box under **Search** options to ensure that the search criteria is not case sensitive.
- 6. In the Search For area, enter (Return Stub); then specify Beginning to End in the Search From and To fields.

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7. Select the **Save** button when you are done.

The Parse and Distribute properties window should resemble the following illustration:



7. Search for Page After Return Stub/Insert Blank Blue Page

A blank blue page must be inserted at the end of every statement (in this case, the end of the statement is the "Return Stub" page). To accomplish this, a Parse and Replace node can be used to search for the page after "Return Stub" and replace the media setting commands with commands that set printing to blue paper.

- 1. Drag a **Parse and Replace** node to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:
- 2. Enter a name for the process node, such as Search for page after Return Stub, in the Node Name field.
- 3. Enter a description for the process node, such as This will insert blank blue paper page, in the **Description** field.
- 4. Make sure the **Enabled** box is checked.

featurebegin{

%%BeginFeature: *MediaType User1

- 5. Check the **Match case** box under **Search** options to ensure that the search criteria is case sensitive.
- 6. In the Search For area, enter the following; then specify All Previous Occurrences to First Occurrence:

7. In the Replace area, enter the following Postscript commands; then specify All Occurrences in the Replace field:

featurebegin{

%%BeginFeature: *KMMediaWeight Thick

<< /KMMediaWeight (Thick) >> /KMOptions /ProcSet findresource /setKMoptions get exec

%%EndFeature
}featurecleanup
featurebegin{

%%BeginFeature: *KMMediaColor Blue

<< /KMMediaColor (Blue) >> /KMOptions /ProcSet findresource /setKMoptions get exec

%%EndFeature

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<< /KMMediaType (CustomType) >> /KMOptions /ProcSet findresource /setKMoptions get exec

%%EndFeature

}featurecleanup

Note: A blank line at the end of the block must be included.

8. Select the Save button when you are done.

8. Create Distribution Folder

Now that your processes have been set up, you need to specify a folder that will store your newly modified Postscript files. Drag an **Output Folder** to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:

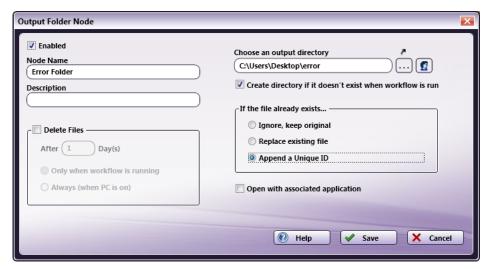
- 1. Enter a name for the Output folder, such as Output Folder, in the Node Name field.
- Select the Append a Unique ID radio button under the If the file already exists... area. This will ensure that all versions of processed files will be kept.
- 3. Click on the **ellipsis** button (...) next to the **Choose an output directory** field to specify a location. In the Browse for Folder window that appears next, select the folder entitled 'output' that you created earlier.
- 4. Select the Save button on the Output Folder Node properties window when you are done.

9. Create Output Folder for Errors

To handle any errors that occur during processing, you can create an Output folder to store all errors in the workflow. Drag an **Output Folder** to the Workflow Builder canvas. Once you double-click on the icon to open up its node properties window, do the following:

- 1. Enter a name for the Output folder, such as Error Folder, in the Node Name field.
- Select the Append a Unique ID radio button under the If the file already exists... area. This will ensure that all versions of processed files will be kept.
- 3. Click on the **ellipsis** button (....) next to the **Choose an output directory** field to specify a location. In the Browse for Folder window that appears next, select the folder entitled 'error that you created earlier.
- 4. Select the **Save** button on the Output Folder Node properties window when you are done.

The Output Folder Node properties window should resemble the following illustration:



10. Connect the Nodes

Now you must connect all of the nodes in the workflow. First, create the positive connections between the node, and then the negative.

Create positive connections. Click the Connector tool from the Connectors palette and do the following:

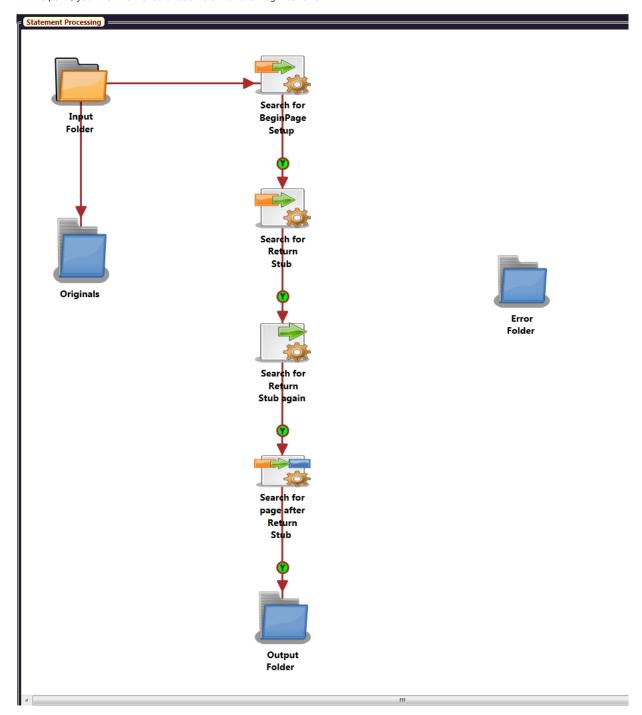
- Connect the Input Folder to the Originals Output Folder.
- Connect the Input Folder to the Search for BeginPageSetup node.
- Connect the SearchForBeginPageSetup node to the Search for Return Stub node.

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- Connect the Search for Return Stub node to the Search For Return Stub Again node.
- Connect the Search for Return Stub Again node to the Search for Page After Return stub node.
- Connect the Search for Page After Return stub node to the Output Folder node.

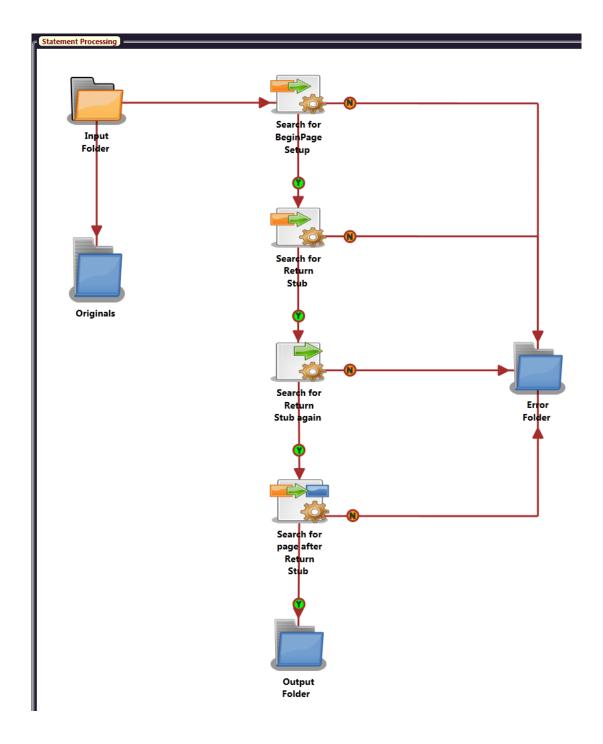
Note: These connections will be positive (indicated by a 'Y' in a circle); by default, the first connection from a Parse node is a positive connector.

At this point, your workflow should resemble the following illustration:



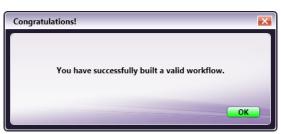
Connect all parsing nodes to the Error Folder node. The connectors will have an 'N' in the circle, indicating that it is a negative connector. By default, the second connector from a parsing node will be negative. The workflow will resemble the following illustration:

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11. Validate the Workflow

To validate the workflow, select the **Validate** button on the tool bar. If there are no errors, a message will appear, indicating that the workflow passed validation, as in the following illustration:



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Folder Browsing at the MFP Panel

This tutorial demonstrates how to set up an index form so that the user can enter a name for the scanned document and choose a folder for the scan destination - all from the MFP's control panel.

Overview: The law firm of AB & C needs to speed up their routing and identification of scanned documents. Specifically, they would like users to be able to browse through their PC's folder structure to pick a scan location right at the MFP panel as well as rename the scanned document using a name entered at the MFP at point of scanning.

Overview Of Tutorial: With Dispatcher Phoenix, you can create an Index form to be displayed on the MFP panel that will display a list of folders for the user to choose from for their scanning destination, as well as an entry field in which to enter the document name. In this tutorial, you will do the following:

- 1. Create a Dispatcher Phoenix workflow to run on a bEST-enabled MFP.
- 2. Add an Output Folder to receive the scanned documents. The Output Folder's location will be determined by what was selected on the MFP panel.
- 3. Create an index form with a "Browse" button that allows user to view their PC's folder structure and choose a scan destination. The index form will also include a text entry field that allows users to enter a unique name for their scanned document.
- 4. Add a Rename node to the workflow that uses the document name entered at the MFP for its rename operation.

Before Starting: Before creating this workflow, do the following:

- Create folders on your Desktop called 'ClientX,' 'ClientY,' and 'ClientZ.'
- · Register an MFP to be used in this workflow.
- · Configure your bEST server settings.

Steps To Take: This tutorial involves the following steps:

- 1. Create a workflow
- 2. Create/customize the MFP Panel node
- 3. Add an Output Folder node to the workflow
- 4. Create an index form
- 5. Add a text field to the index form
- 6. Add Output Folder workflow index field to form
- 7. Create a Rename node
- 8. Connect the nodes
- 9. Validate the workflow
- 10. Run the workflow
- 11. Access the workflow at the MFP
- 12. Access the index form at the MFP

1. Create a Workflow

Your first step is to create a workflow by selecting the **New Workflow** icon on the main application screen's toolbar. This will open up the Workflow Builder. In the Canvas Properties palette on the right-hand side of the window, enter an appropriate name for the project in the **Project Name** field (e.g., "Send To Folder").

2. Create/Customize the MFP Panel Node

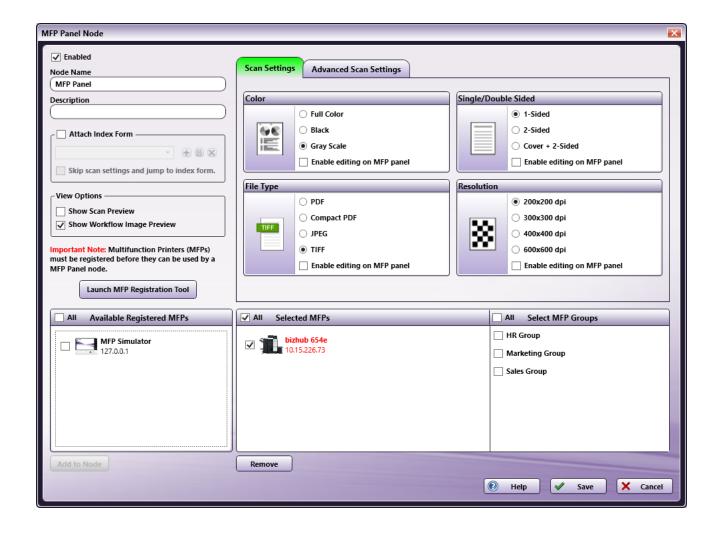
Next, define a MFP Panel node for the MFP that you will be using for scanning. Drag-and-drop a MFP Panel Node onto the Workflow Builder canvas.

Once you double-click on the icon to open up its node properties window, do the following:

- 1. Enter an appropriate name for the MFP Panel node in the **Node Name** field.
- 2. Make sure that the **Enabled** box is checked.
- 3. Drag the appropriate printer icon from the Available Registered MFP area to the Selected MFPs area.
- 4. Select the **Save** button when you are done.

The MFP Panel Node properties window should resemble the following illustration:

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3. Create an Output Folder Node

Next, define an Output Folder to store the scanned documents. Drag-and-drop an Output Folder Node onto the Workflow Builder canvas.

4. Create an Index Form

Next, create an index form for display on the device panel. To start, do the following:

- 1. Open the MFP Panel node again; then check the **Attach Index Form** box and click on the + button.
- 2. On the Create new index form pop-up window, select the **Blank Index Form** button.

A blank Index Form window will now appear. The Index Form contains a variety of fields, represented as buttons, that can be dragged-and-dropped into place and customized to suit your purposes. With an index form associated with a MFP Panel node, the form will be available for access on the device panel every time the user runs this workflow. For the purposes of this tutorial, you will only need to create the following two fields:

- $\circ~$ A text entry field that allows you to enter a name for the document to be scanned.
- An Output Folder field associated with the Output Folder node in the workflow. This field allows the user to choose an output folder to which the scanned documents will be sent.
- 3. The first thing you should do once a blank index form has been created is provide a name for the form. Select the **New Index Form** label on the index form's work area. You should see a Page Break Properties field on the left-hand side of the window; type an appropriate name for your index form in the **Page title** field (e.g., Scan to Folder).

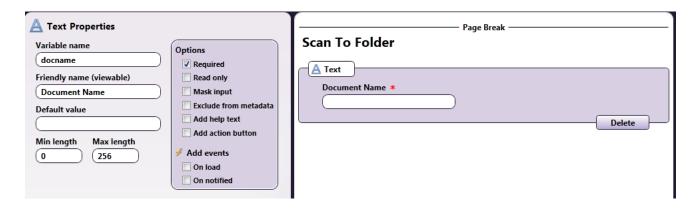
5. Add Text Field to Index Form

- 1. On the Index Form Builder, select the **Add field** tab at the bottom of the window; then drag-and-drop a **Text** button to the index form's work area. You will see an empty text field with the text "Label goes here" above it.
- 2. Select the empty text field; the **Text** properties should appear on the left-hand side of the window. Customize these properties accordingly:

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- In the Variable name field, enter 'docname.' This variable name will be referenced later in the workflow's Rename node.
- In the Friendly name field, enter 'Document Name.' This text will be visible above the text field on the MFP panel.
- Under Options, check the Required box. The document will not be able to be scanned unless this information is entered.

See the following illustration:



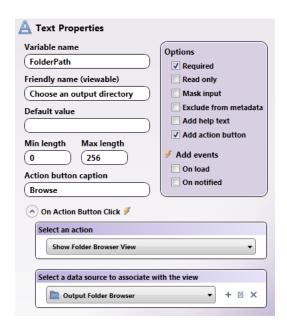
6. Add Output Folder Workflow Index Field to Form

Next, you can use the Output Folder workflow index field to set up folder browsing from the index form. Do the following:

1. On the Index Form Builder, select the **Add field** tab at the bottom of the window; then drag-and-drop the **Output Folder** button to the index form's work area. You will see the following empty field on the index form's work area:



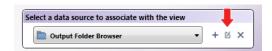
2. Select the empty **Output Folder workflow field**; its properties should appear on the left-hand side of the window. With the Output Folder workflow field, setting up folder browsing is easy since the necessary field properties and actions are automatically set by default, as in the following illustration:



For the purposes of this tutorial, keep the default values.

3. Customize the **Output Folder Browser** data source for the action button by clicking on the **Edit** button. The Folder Browser Configuration window will appear.

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- 4. Configure the folder browsing. On the Folder Browser Configuration window, you can choose the **root folder** and **default folder** that will appear on the index form at the MFP panel. For the purposes of this tutorial, choose your Desktop as the root folder and Client X as your default folder; select the **Save** button when you are done to keep your changes and close the Folder Browser Configuration window.
- 5. Save the index form by clicking on the **Save** icon on the menu bar.

At this point, your index form should resemble the following illustration:



- 6. Select the **Save** button when you are done to return to the MFP Panel node.
- 7. Save the MFP Panel node properties window to close it.

7. Create Rename Node

Next, you should define a Rename node that uses the name that was entered on the MFP panel as the file's new name. Do the following:

- 1. Drag-and-drop a Rename node to the Workflow Builder's work area; double-click on the node icon to open up its properties window.
- 2. Delete the default **Counter** and **File Name** components by clicking on the **X** in their respective rows.
- 3. Drag a **Metadata** File Naming Component to the right-hand side of the window; double-click on the row and the **Select Metadata Key** button will appear.
- 4. Click on the **Select Metadata Key** button to open up the Metadata Browser. The Metadata Browser window will display all metadata (file, system, etc.) that is available in the workflow. Because you have created an index form to be associated with this workflow, the following metadata from the index form will be displayed in the Metadata Browser:
 - docname, which is the text field's variable name.
 - $\circ~$ Folder Path which is the Output Folder workflow field's variable name.

See the following illustration:

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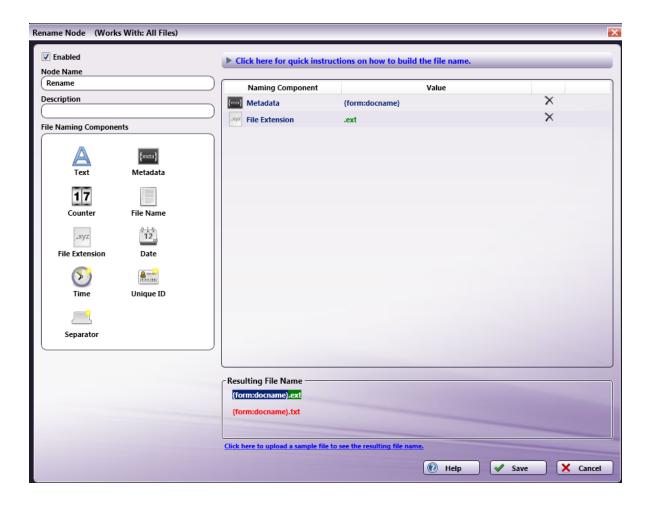


For the purposes of this tutorial, you are interested in the {form:docname} variable, which will pull the value that has been entered in the 'docname' field on the MFP panel.

- 5. Click on **{form:docname}** underneath Index Form; then click on the **Select** button. The Metadata Browser window will close and **{form:docname}** will appear on the Rename node properties window.
- 6. Drag a **File Extension** File Naming Component to the right-side of the Rename window.

See the following illustration:

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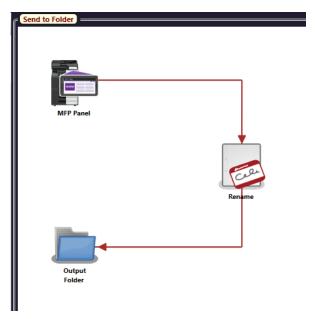


7. Select the Save button when you are done.

8. Connect the Nodes

Now you must connect all of the nodes in the workflow. Use a connector to connect the MFP Panel Node to the Rename Node and the Rename Node to the Output Folder node.

At this point, your workflow may resemble the following illustration:



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9. Validate the Workflow

To validate the workflow, select the Validate button on the tool bar.

If there are no errors, a message will appear, indicating that the workflow passed validation.

10. Run the Workflow

Now, you should close the Workflow Builder (File > Exit) to return to the main application screen; then run the workflow.

11. Access the Workflow at the MFP Panel

At the MFP that you have configured to run this workflow, access your MFP Panel workflow.

Note: You may have to log in to access your workflows (depending on the MFP user authentication options set in Dispatcher Phoenix).

- If you have multiple workflows configured to run on the MFP, you will see a list of available workflows along with thumbnail images of each workflow. Tap on the 'Send to Folder' icon to access your workflow. The Workflow Details screen will then appear.
- If you only have one workflow defined for the MFP, the Workflow Details screen will immediately appear once you have logged in.

12. Access the Index Form

At the MFP, the Workflow Details screen displays an image of the workflow, specified scan settings, as well as an icon for the Index Form. Click on the Index Form and enter a document name and choose a folder to which the document should be scanned, as in the following illustration:



Tap the Save button when you are done; then start your scan job.

Use Cases

Dispatcher Phoenix can perform a variety of processes automatically, including:

Image Processes

- Scan TIFF files and add the following annotations to each page: a 'Received' stamp, the date, and a sequence number similar to a mechanical stamp.
- Scan images which are then despeckled, deskewed, annotated, and watermarked on each page. The images are then printed with all modifications
- Prescription orders sent from twenty-five nurses stations to a hospital pharmacy are stamped with the date, doctor's name, nurses station name, and priority number before being sent to the hospital pharmacy printer. These orders are also archived on a central server.

Print Processes

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- PDF files generated by an application and saved to a folder during the week are printed automatically at twenty-five copies, duplex, stapled, on Saturday.
- Text files created by a mainframe application and saved to a folder are automatically printed at 2 a.m. on Wednesdays and Fridays only.

Desktop Router

• On Monday, all files from scanner mailbox 1 get moved to a folder called 'Monday.' On Tuesday, all files from mailbox 2 get moved to a folder called 'Tuesday,' and so on through the week. This happens each night after work hours. Five Router processes are scheduled nightly.

Parser Processes

• New insurance cards are needed for over 10,000 customers. Each customer file contains 3-15 pages, and the insurance card page needs to be printed on special card stock. A parser process can be used to change the input paper tray on the printer for the special card stock.

Parser Processes Case Studies

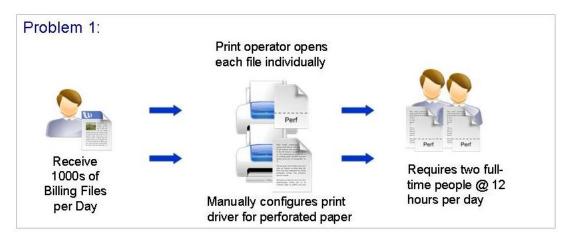
The Parser processes in Dispatcher Phoenix are powerful time-saving tools. Print jobs that involve multiple manual steps can be automated and streamlined, freeing up your staff to perform other tasks.

Parser rules can be written that will modify the behavior of a Konica Minolta MFP based on a trigger inserted in the print stream. For example, a parser rule could insert a command to change the input tray when printing a special page in a document being processed. The case studies below are just a few examples of what the Parser processes can do.

Scenario 1 - Billing Files

Background - Each day an insurance company creates thousands of billing statements by inserting mainframe data, based on a client's coverage, into Microsoft Word documents which are then submitted to an in-house print shop. Depending on the policy data included, the file is 3-15 pages long. The last page for each client's bill needs to be printed on blue, perforated paper so clients can tear off a return "stub" and send it in with their payment. All other pages are to be printed on standard, white paper and the packets need to be merged, collated and mailed out as one packet per customer.

Problem - Each Microsoft Word file would need to be opened individually. The print driver would then need to be manually configured to print the "return payment stub" page on the special perforated paper contained in Tray 3. The remainder of the document would be printed on standard, white paper.



The print shop calculated that it would take a print operator approximately 40 seconds to open up each file in Microsoft Word, search for the "return payment stub" page, and then manually configure the print driver to print the return stub page on the perforated paper contained in Tray 3.

This print shop rejected this job as too time consuming and cost prohibitive as it would not only require dedicating two full time employees to the job, but it also meant that for the majority of time, the bizhub pro 1050 was idle (waiting for the print operator to finish configuring the next print job).

Solution - Dispatcher Phoenix automates the process! Microsoft Word document files are collected and converted to Postscript automatically. Parser processes search for triggers and adds appropriate tray calls for special paper. The new (parsed) file is sent to the bizhub pro 1050 with the new instructions. Packets are printed with the special page automatically inserted where it belongs.

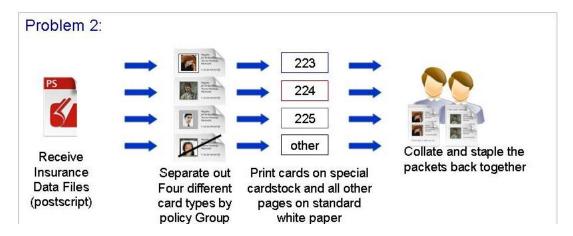
Due to the speed at which the workflow executes, the collected Microsoft Word files are processed and inserted into the print queue at a substantially faster rate than the bizhub pro 1050 can print them. This results in the bizhub pro 1050 continuously printing until all of the files have been processed (no idle time). Where it used to take two full time people more than 8 hours to process a typical days worth of work, it now only takes a few hours, freeing up the print shop personnel to work on other projects.

Scenario 2 - Insurance Cards

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Background - Client dental insurance policies are submitted to the print shop from a mainframe system as print ready postscript data. The first page of each customer packet needs to be printed on special card stock with two removable insurance cards. There are four, possible, distinct, card types based on the client policy and group number. All other pages are to be printed on standard, white paper and finally, all the packets need to be collated and stapled for distribution.

Problem - Print shop must accept each print job as formatted Postscript data. The first page of each policy needs to be printed on one of four possible card stock. The Policy/Group Number contained in the postscript data stream determines which card stock is used for the first page. All other pages need to be printed on standard paper. The entire packet (policy) needs to be stapled together as a single job.

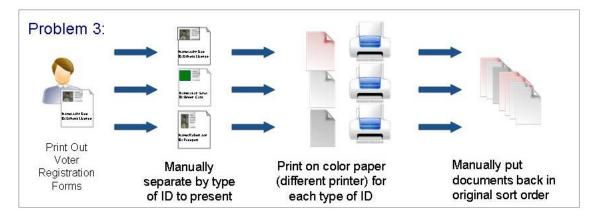


Solution - Dispatcher Phoenix automates the process! Files are collected automatically. Parser processes search for unique triggers for each policy/group and adds tray calls to send to the bizhub pro 1050. Files are automatically sent to the bizhub pro 1050 to print where each type of insurance packet is stapled, ready for mailing.

Scenario 3 - Voter Registration

Background - City voter registration documents need to be printed on color-coded paper to visually inform the registrar what kind of personal ID to request from each voter at the polls. Specific voter data, for several hundred thousand voters, determines which type of identification they need to present. For clarity, it is requested that the print shop print the registration documents for each identification type on different colored paper (i.e., pink, white, and gray).

Problem - Each voter file must be opened individually to determine color-coding information. Files need to be manually grouped by color for printing. Groups of like-color documents are printed as separate jobs (possibly on separate printers).



Solution - Dispatcher Phoenix automates the process! Workflow is set to collect the files automatically. The collected files are converted to PostScript (.PRN file). A parser node is configured to add color coding information and tray calls. Parsed files are sent to a Printer distribution node print complete file (ready for mailing) to the bizhub pro 1050.

Conclusion

In each scenario, the customer saved time and money by using Dispatcher Phoenix to automate a complex document workflow. Each workflow could be configured by the customer, eliminating the need for an on-site request or special development.

Using the Ganging Job Submitter

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Use the **Ganging Job Submitter Tool** to create an input file for the **Ganging Node**.

The **Ganging Job Submitter** screen can be launched by double-clicking the icon shown below:





Import a Job

- 1. Import a new job by selecting the **Import New Job** button. On the screen that opens, navigate to then select the file.
- 2. As an alternative to this method, drag and drop a PDF file onto the main panel of the GUI.
- 3. When an import is successful, the following message is displayed.

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4. If the job is not imported, the following message appears. The name of the PDF file that failed to import is also noted:



Default Settings

1. "Default Settings" button can be used to apply the current values of **Copies** and **Print Type** in **Job Details** section as default values for the new jobs to be imported.



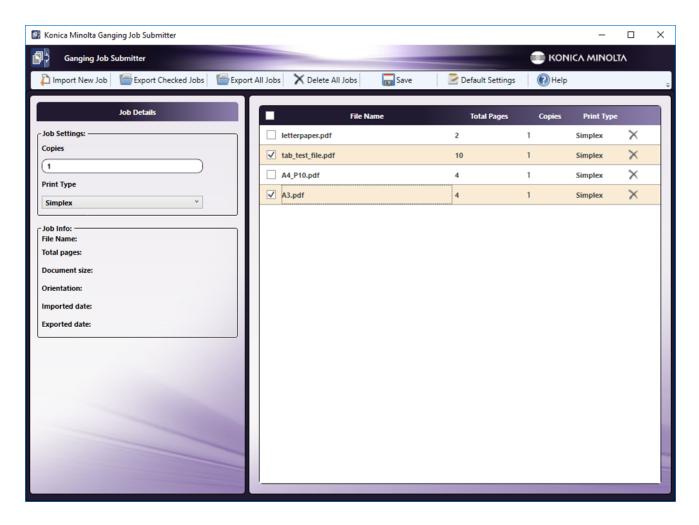
- 2. Click the **Default Settings** button.
- 3. A confirmation messages opens, Click Yes to apply current settings as default settings or No to cancel the request.



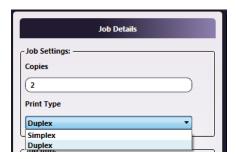
Update Job Details

1. Select one or more jobs from the table by holding the keyboard's (Ctrl) or (Shift) key:

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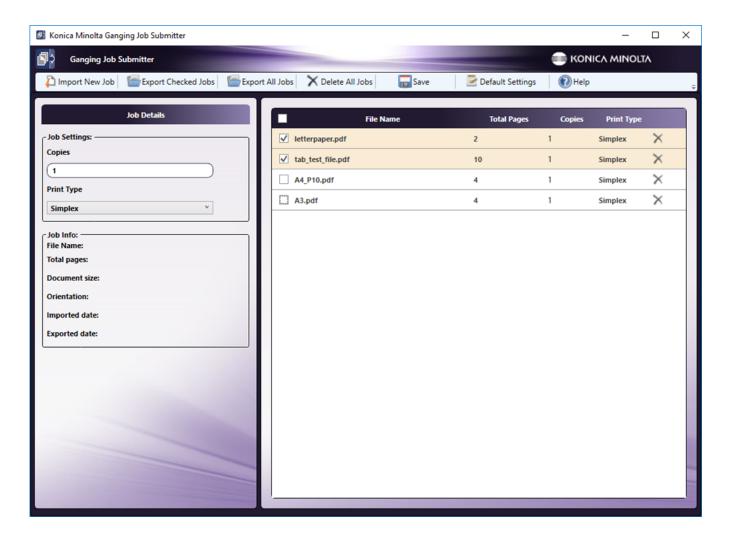
2. Under the **Job Details** section, enter a value for **Copies** and select a **Print Type** from the drop-down:



3. The updated **Copies** and **Print Type** values are reflected in job table.

Export a Job (or Jobs)

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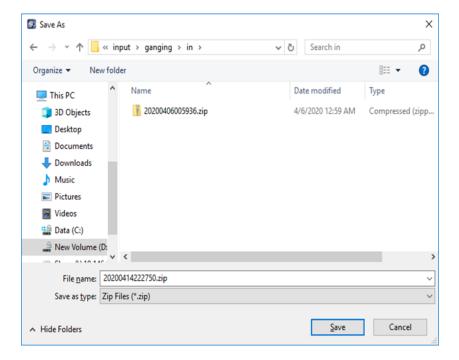


1. In the main panel, click the selection box of one or more jobs. From the top menu, click the Export Checked Jobs button.



2. On the screen that opens, navigate to the preferred storage location, and click **Save**.

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3. As an option, select the **Export All Jobs** button to export all the jobs in the main panel



4. The jobs are sent to the specified location. Once the export is successful, the following pop-up message opens:



- 5. A zip file is created for each job. The zip file is stored in the location specified in *Step 2* above. The file name is noted in the pop-up message using the naming convention date + time.ZIP. The date and time format is as follows:
 - If the ZIP file is created at 09:58:42 on Aug 10, 2017, the file name is:

20170810095842.ZIP

The ZIP file is ready to be submitted to the **Ganging Node**.

Delete Jobs

- 1. In the main panel, select one or more jobs by holding the (Ctrl) or (Shift) key then pressing the keyboard's Delete button.
- 2. A confirmation message opens. Click **Yes** to delete the selected job(s) or **No** to cancel the request. If **Yes** is clicked, the selected jobs are removed from the job's list.

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3. To delete all jobs, click the **Delete All Jobs** button:



4. A confirmation message opens. Click Yes to delete all jobs or No to cancel the request. If Yes is clicked, all jobs are removed from the job's list.



Save and Help Options

1. To save all changes made to the node, click the Save button:



2. To launch the Help file for Ganging Job Submitter, click the **Help** button:



Web-Based Authentication

With Dispatcher Phoenix version 6.4, users can now use the new Dispatcher Phoenix Web Accounts module to set up and manage their accounts when connecting to:

- Box
- OneDrive
- OneDrive for Business
- Google Drive
- Dropbox
- SharePoint Online

Note: For more information about configuring a connector on the Dispatcher Phoenix Web Accounts Module, click on one of the links above.

Why should I update Dispatcher Phoenix to version 6.4?

By updating Dispatcher Phoenix to version 6.4, a user will be able to access the Dispatcher Phoenix Web Accounts module to easily add and manage multiple accounts for multiple connectors, all in one place. These connectors include: Box, Dropbox, Google Drive, OneDrive, OneDrive for Business,

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and SharePoint Online. The user will also have the option to toggle between accounts at the MFP panel or use single sign-on.

I have updated Dispatcher Phoenix to version 6.4. Why did some of my workflows stop working?

Once a user updates Dispatcher Phoenix to version 6.4, the existing workflows using any of the connectors listed above will stop working; however, it will only take a few minutes to follow the simple steps to modify these workflows. Downtime should be minimal, but we do generally recommend installing updates during non-business hours.

How can I modify my workflows that have stopped working?

Please follow the instructions below.

Setting Up Workflows

- 1. Log into Dispatcher Phoenix Web.
- 2. Select the Accounts tool from the Home page
- 3. Select the + button; then select the application that you would like to set up (e.g., Dropbox).
- 4. Log into your account with your username and password.

The account will be added and the user will be able to log into Dispatcher Phoenix at the MFP and be automatically logged into their account – a true single sign on experience!

Modifying Existing Workflows

This new authentication method will affect existing workflows that route to Box, OneDrive, OneDrive for Business, Google Drive, Dropbox, and SharePoint Online. The following steps should be taken to modify existing workflows:

For Non-Index Form Workflows (workflows that do not include scanning from MFP):

- 1. Set up your account via Dispatcher Phoenix Web's Accounts tool. (See instructions above).
- 2. In the Dispatcher Phoenix client application, open the workflow in the Workflow Builder Tool.
- 3. Open the connector node. You will be automatically connected to the account. You can also select another account to access from the Account drop-down list.
- 4. Save the node and the workflow.

For MFP Panel Node / Index Form Workflows (workflows that include scanning from MFP):

- 1. Set up your account via Dispatcher Phoenix Web's Accounts tool. (See instructions above).
- 2. In the Dispatcher Phoenix client application, open the workflow in the Workflow Builder Tool.
- 3. Open the MFP Panel node.
- 4. Delete the existing Index Form for the connector that is associated with the MFP Panel Node.
- 5. Create a new blank Index Form.
- 6. Drag-drop the Connector button (e.g., Dropbox) that is listed under "Workflow index fields" to the main Index Form Builder's area. The correct index fields for the connector will be automatically created.
- 7. Save the Index Form.
- 8. Save the MFP Panel Node.
- 9. Run the workflow.

Note: Any customizations made to the old Index Form would need to be recreated as well, if necessary.

Dispatcher Paragon

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