



**Dispatcher**  
Phoenix

# User's Guide

November 17, 2011



## 1.0 Overview Of Dispatcher® Phoenix

The Dispatcher Phoenix application manages and automates document imaging, printing, and routing tasks. Through the use of the Workflow Builder, an intuitive graphical user interface, workflows are easily created and customized to fit any business need.

In a Dispatcher Phoenix workflow, files are received from different user boxes on scanning devices, file folders in a local or network directory, or directly from an MFP interface panel that uses Konica Minolta's bEST technology. These files are then processed according to set user-defined conditions. After processing, files are distributed to another local or network directory, MFP, FTP server, or email recipients. All of this is done through the use of custom-defined nodes, organized as follows:

- **Collection nodes** are monitored and used as input for a workflow.
- **Process nodes** are automated file manipulation tasks.
- **Distribution nodes** are the output locations for the workflow.

Dispatcher Phoenix comes with a Workflow Builder, a Workflow Scheduler to define when exactly workflows should run, a stand-alone Log Viewer, and a set number of default collection, processing, and distribution nodes. In addition, optional nodes and services can be added to the application at any time using the Add-In Manager that comes with the application.



## 1.1 Standard Application

Dispatcher Phoenix comes with a default set of collection, processing, and distribution nodes. These nodes are:

### COLLECTION NODES (STANDARD)

<i>bEST</i>	Initiates workflows right from a Konica Minolta MFP panel.
<i>Input Folder</i>	Collects files from a directory or folder on your PC or network.
<i>MFP</i>	Collects files for processing from a User box on a KMBS MFP.

### PROCESS NODES (STANDARD)

<i>Annotate</i>	Annotates scanned image files with the date received, a counter sequence number, or text of your choice, in a specific location on the page.
<i>Convert to PS</i>	Converts image files to PostScript format.
<i>Deskew</i>	Straightens skewed images. Be aware that the more accuracy you request from the deskew process, the longer the file will take to process.
<i>Despeckle</i>	Removes speckles from a scanned image. Caution needs to be taken so the speckles are removed but the image is not distorted.
<i>Merge</i>	Combines single images into large image files, based on the number of files set.
<i>Mirror Image</i>	Reverses images (either horizontally or vertically).
<i>Negative Image</i>	Creates a negative of an incoming document (i.e., converts light area to dark and vice versa).
<i>Rename</i>	Changes the filename using variables, counters, or static text.
<i>Split</i>	Separates multi-page files into single pages or 'every x pages'.
<i>Watermark</i>	Overlays a designated opaque image (i.e. a company logo) on an image file.

### DISTRIBUTION NODES (STANDARD)

<i>Folder</i>	Distributes to a directory or folder on your PC or network.
<i>FTP</i>	Distributes to a directory on an FTP server.
<i>Printer</i>	Distributes to a KMBS MFP for printing the output.
<i>SMTP Out</i>	Sends output files as email attachments.



## 1.2 Optional Nodes (Add-Ins)

Optional nodes are also available for use with the Dispatcher Phoenix application. Easily accessed through the Add-In Manager tool that comes with the application, these optional nodes will add extra power and functionality to your workflows. Optional nodes include:

### COLLECTION NODES (OPTIONAL)

<i>LPR In</i>	Collects print jobs from an LPR Client like the Windows Printer Queue.
<i>Dispatcher Pro Port</i>	Supports the print-to-file feature for any Windows application.
<i>SMTP In</i>	Receives emails sent from an MFP.

### PROCESS NODES (OPTIONAL)

<i>Advanced Bates Stamp</i>	Places an unlimited number of Bates stamps on scanned image files.
<i>Advanced OCR</i>	Refines OCR results by allowing user-defined zones to identify exactly how the OCR engine should recognize various elements on the page. Extracts metadata information from multi-zones and provides auto-zone capabilities.
<i>2D Barcode Processing</i>	Recognizes and extracts information from two-dimensional barcodes on scanned documents.
<i>Barcode Processing</i>	Recognizes and extracts information from barcodes on scanned documents.
<i>Barcode Generator</i>	Generates a barcode graphic by user-specified barcode data, encoding type, and output file format.
<i>Color Route</i>	Routes files based on the number or percentage of color pages in a document.
<i>Convert to Office</i>	Converts image files and PDFs to standard Microsoft Office documents, such as Word, Excel, and Powerpoint.
<i>Convert to PDF</i>	Converts any image file to a PDF document, including options for creating PDF/A compliant documents.
<i>Email Parser</i>	Extracts email attachments, parses the header metadata of emails, and routes emails based on set conditions.
<i>Highlight/Strikeout</i>	Highlights important information or marks text with strikethrough lines, based on user-specified search.
<i>Insert</i>	Inserts a string as part of the workflow, without requiring a parse process.
<i>KDK Code Generator</i>	Adds Kodak KDK/KDE PDL commands to PDF or Postscript files to facilitate printing on a Kodak Digimaster.
<i>KDK-PDL Converter</i>	Converts Konica Minolta PDL commands to Kodak KDK/KDE PDL commands or Kodak KDK/KDE PDL to Konica Minolta PDL to promote communication between Konica Minolta and Kodak printers.
<i>Page Count Route</i>	Routes files based on the total number of pages in a document.
<i>Parse</i>	Creates a <i>Search</i> rule to search file attributes such as name, file type or size.
<i>Parse &amp; Distribute</i>	Searches for a keyword or text string within a file, not just in the file name or size, but to search the content of the file.
<i>Parse &amp; Insert</i>	Inserts a text string after the object of a search has been found.
<i>Parse &amp; Replace</i>	Replaces text found by a search rule.
<i>Print to File</i>	Converts documents to PRN format so you can print it to a file, and print it using the associated Windows application.
<i>Metadata to File</i>	Extracts metadata from incoming files and stores that information in a separate file.
<i>Metadata Route</i>	Routes documents based on user-specified metadata search criteria.
<i>Redact</i>	Blacks out sensitive information from scanned image files, based on user-specified search.

### SERVICES (OPTIONAL)

<i>LPR Manager</i>	Allows administrative users to configure the Konica Minolta LPR Service, which receives print jobs over LPR and submits them to the workflow services.
<i>SMTP Manager</i>	Allows administrative users to configure the SMTP Service, which receives email over SMTP and submits them to the workflow services.







**DISPATCHER®** is a trademark of **Konica Minolta Business Solutions**. All other brands and product names are registered trademarks or trademarks of their respective owners.

### **DISPATCHER® - END-USER SOFTWARE LICENSE AGREEMENT**

**IMPORTANT--READ THESE TERMS CAREFULLY BEFORE DOWNLOADING THIS SOFTWARE** or using the products described in this Users Guide, or opening the shrink-wrap package containing Software. BY DOWNLOADING OR USING THIS SOFTWARE, YOU ACKNOWLEDGE THAT YOU HAVE READ THIS LICENSE AGREEMENT, THAT YOU UNDERSTAND IT, AND THAT YOU AGREE TO BE BOUND BY ITS TERMS. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS OF THIS LICENSE AGREEMENT, PROMPTLY EXIT THIS PAGE WITHOUT DOWNLOADING THE SOFTWARE.

#### **1. Grant of License for Registered Users**

Konica Minolta Business Solutions U.S.A., Inc. ("Konica Minolta") grants you a non-exclusive, non-transferable license to use the program with which this license is distributed (the "Software"), including any documentation files accompanying the Software ("Documentation") on a single server or personal computer to support up to the number of simultaneous users for which you have paid the license fee, provided that: (i) the Software is installed on only one server or personal computer; (ii) the Software is NOT modified; (iii) all copyright notices are maintained on the Software; and (iv) you agree to be bound by the terms of this License Agreement. The Software and Documentation shall be used only by you, only for your own personal or internal business use and not in the operation of a service bureau or for the benefit of any other person or entity.

#### **2. Ownership**

You have no ownership rights in the Software. Rather, you have a license to use the Software as long as this License Agreement remains in full force and effect. Ownership of the Software, Documentation and all intellectual property rights therein shall remain at all times with Konica Minolta. Any other use of the Software by any person, business, corporation, government organization or any other entity is strictly forbidden and is a violation of this License Agreement.

#### **3. Copyright**

The Software and Documentation contain material that is protected by United States and international copyright law and trade secret law, and by international treaty provisions. All rights not granted to you herein are expressly reserved by Konica Minolta. You may not remove any proprietary notice of Konica Minolta from any copy of the Software or Documentation.

#### **4. Restrictions**

You may not publish, display, disclose, rent, lease, modify, loan, distribute, or create derivative works based on the Software or any part thereof. You may not reverse engineer, decompile, translate, adapt, or disassemble the Software, nor shall you attempt to create the source code from the object code for the Software. You may not transfer the installed Software or Documentation, or any copies of the installed Software or Documentation, or the License granted under this Agreement, to any third-party without Konica Minolta prior written consent.

#### **5. Confidentiality**

You acknowledge that the Software contains proprietary trade secrets of Konica Minolta and you hereby agree to maintain the Confidentiality of the Software using at least as great a degree of care as you use to maintain the Confidentiality of your own most information. You agree to reasonably communicate the terms and conditions of this Software License Agreement to those persons employed by you who come into contact with the Software, and to use reasonable best efforts to ensure their compliance with such terms and conditions, including, without limitation, not knowingly permitting such persons to use any portion of the Program for the purpose of deriving the source code of the Program or defeating the lock and/or unlock codes.



**6. Limited Warranty**

KONICA MINOLTA WARRANTS FOR A PERIOD OF THIRTY (30) DAYS AFTER PURCHASE THAT THE SOFTWARE WILL OPERATE SUBSTANTIALLY IN ACCORDANCE WITH THE DOCUMENTATION. SHOULD THE SOFTWARE NOT SO OPERATE, YOUR EXCLUSIVE REMEDY, AND KONICA MINOLTA'S SOLE OBLIGATION UNDER THIS WARRANTY, SHALL BE, AT KONICA MINOLTA'S SOLE DISCRETION, CORRECTION OF THE DEFECT OR REPLACEMENT OF THE SOFTWARE. ANY USE BY YOU OF THE SOFTWARE IS AT YOUR OWN RISK. THIS LIMITED WARRANTY IS THE ONLY WARRANTY PROVIDED BY KONICA MINOLTA REGARDING THE SOFTWARE. EXCEPT FOR THE LIMITED WARRANTY ABOVE, THE SOFTWARE IS PROVIDED "AS IS." TO THE MAXIMUM EXTENT PERMITTED BY LAW, KONICA MINOLTA DISCLAIMS ALL OTHER WARRANTIES OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. KONICA MINOLTA SPECIFICALLY DOES NOT WARRANT THAT THE FUNCTIONS CONTAINED IN THE SOFTWARE WILL MEET ANY REQUIREMENTS OR NEEDS YOU MAY HAVE, OR THAT THE SOFTWARE WILL OPERATE ERROR FREE OR IN AN UNINTERRUPTED FASHION, OR THAT ANY DEFECTS OR ERRORS IN THE SOFTWARE WILL BE CORRECTED, OR THAT THE SOFTWARE IS COMPATIBLE WITH ANY PARTICULAR PLATFORM. SOME JURISDICTIONS DO NOT ALLOW THE WAIVER OR EXCLUSION OF IMPLIED WARRANTIES SO THEY MAY NOT APPLY TO YOU.

**7. Limitation of Liability**

IN NO EVENT WILL KONICA MINOLTA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY INCIDENTAL OR CONSEQUENTIAL DAMAGES (INCLUDING, WITHOUT LIMITATION, INDIRECT, SPECIAL, PUNITIVE, OR EXEMPLARY DAMAGES FOR LOSS OF BUSINESS, LOSS OF PROFITS, BUSINESS INTERRUPTION, OR LOSS OF BUSINESS INFORMATION) ARISING OUT OF THE USE OF OR INABILITY TO USE THE PROGRAM, OR FOR ANY CLAIM BY ANY OTHER PARTY, EVEN IF KONICA MINOLTA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. KONICA MINOLTA'S AGGREGATE LIABILITY WITH RESPECT TO ITS OBLIGATIONS UNDER THIS AGREEMENT OR OTHERWISE WITH RESPECT TO THE SOFTWARE AND DOCUMENTATION OR OTHERWISE SHALL NOT EXCEED THE AMOUNT OF THE LICENSE FEE PAID BY YOU FOR THE SOFTWARE AND DOCUMENTATION. BECAUSE SOME STATES/COUNTRIES DO NOT ALLOW THE EXCLUSION OR LIMITATION OF LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES, THE ABOVE LIMITATION MAY NOT APPLY TO YOU.

**8. Export Restrictions**

THIS LICENSE AGREEMENT IS EXPRESSLY MADE SUBJECT TO ANY LAWS, REGULATIONS, ORDERS, OR OTHER RESTRICTIONS ON THE EXPORT FROM THE UNITED STATES OF AMERICA OF THE SOFTWARE OR INFORMATION ABOUT SUCH SOFTWARE WHICH MAY BE IMPOSED FROM TIME TO TIME BY THE GOVERNMENT OF THE UNITED STATES OF AMERICA. YOU SHALL NOT EXPORT THE SOFTWARE, DOCUMENTATION, OR INFORMATION ABOUT THE SOFTWARE AND DOCUMENTATION UNLESS YOU ARE IN COMPLIANCE WITH SUCH LAWS, REGULATIONS, ORDERS, OR OTHER RESTRICTIONS.

**9. Termination**

This License Agreement is effective until it is terminated. You may terminate this License Agreement at any time by destroying or returning to Konica Minolta all copies of the Software and Documentation in your possession or under your control. Konica Minolta may terminate this License Agreement for any reason, including, but not limited to, if Konica Minolta finds that you have violated any of the terms of this License Agreement. Upon notification of termination, you agree to destroy or return to Konica Minolta all copies of the Software and Documentation and to certify in writing that all known copies, including backup copies, have been destroyed. All provisions relating to confidentiality, proprietary rights, and non-disclosure shall survive the termination of this Software License Agreement.

**10. General**

This License Agreement shall be construed, interpreted and governed by the laws of the State of Connecticut without regard to conflicts of law provisions thereof. The exclusive forum for any disputes arising out of or relating to this License Agreement shall be an appropriate federal or state court sitting in Connecticut, USA. This License Agreement shall constitute the entire Agreement between the parties hereto. Any waiver or modification of this License Agreement shall only be effective if it is in writing and signed by both parties hereto. If any part of this License Agreement is found invalid or unenforceable by a court of competent jurisdiction, the remainder of this License Agreement shall be interpreted so as to reasonably effect the intention of the parties.



### **11. Notice to U.S. Government End Users**

U.S. GOVERNMENT RESTRICTED RIGHTS: The Licensed Articles are provided with restricted rights. Use, duplication, or disclosure by the government is subject to restrictions set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and computer Software clause at DFARS 252.277-7013, and paragraph (c)(1) and (2) of the commercial Computer Software - Restricted Rights clause at FAR 52.277-19. The Software is a "commercial item," as that term is defined at 48 C.F.R. 2.101, consisting of "commercial computer software" and "commercial computer software documentation," as such terms are used in 48 C.F.R. 12.212. consistent with 48 C.F.R. 12.212 and C.F.R. 227.7202-1 through 227.7202-4, all U.S. Government End Users acquire the Software with only those rights set forth herein. The manufacturer is: Konica Minolta Business Solutions U.S.A., Inc., 101 Williams Drive, Ramsey, NJ 07446, U.S.A.



## TABLE OF CONTENTS

1.0	Overview Of Dispatcher® Phoenix .....	1
1.1	Standard Application .....	2
1.2	Optional Nodes (Add-Ins).....	3
1.3	Dispatcher Phoenix Configurations .....	4
1.3.1	Dispatcher Phoenix Legal .....	4
1.3.2	Dispatcher Phoenix Pro .....	5
1.4	Using This Manual .....	5
2.0	Requirements .....	6
2.1	Operating System .....	6
2.2	Hardware Requirements .....	6
2.3	Video Card Requirements .....	6
3.0	Installation.....	8
3.1	Installing Standard Application/Default Nodes .....	8
3.1.1	Password Required On Windows 2008 Server.....	10
3.2	Using The Add-In Manager To Install Optional Nodes .....	11
3.2.1	Opening The Add-In Manager .....	11
3.2.2	Uninstall .....	12
3.2.3	Updates .....	13
3.2.4	Available to Install.....	14
3.2.5	Using The Search Field .....	14
3.3	Uninstalling The Application.....	15
4.0	Registration/Licensing .....	16
4.1	Registering - 30 Day Free Demo Version .....	17
4.1.1	Automatic Web Registration .....	17
4.1.2	Manual Registration.....	17
4.2	Registering - Full Version.....	20
4.2.1	Automatic Web Registration .....	20
4.2.2	Manual Registration.....	22
4.3	Registering - Upgrade Version .....	22
4.3.1	Automatic Web Registration .....	23
4.3.2	Manual Registration.....	23
4.4	Registering - Add-Ins .....	24
4.4.1	Automatic Web Registration .....	25
4.4.2	Manual Registration.....	25
4.5	Licensing.....	28
4.5.1	Default Licensing .....	28
4.5.2	Re-Activating a License .....	29
4.5.3	Login Credentials Required .....	30
5.0	Using The Main Application Screen .....	31
5.1	Tool Bar .....	32
5.1.1	Icons .....	32
5.1.2	Tools Menu .....	32
5.1.2.1	Options Window .....	33
5.1.2.1.1	General Settings .....	33
5.1.2.1.2	Usage Thresholds.....	34
5.1.2.1.3	Log Level .....	34
5.1.2.1.4	SMTP Service ✓OPTIONAL .....	35
5.1.2.1.5	SMTP Manager.....	36
5.1.2.1.6	LPR Service ✓OPTIONAL .....	38
5.1.3	Help .....	38
5.1.3.1	Customer Feedback .....	38
5.1.3.2	License Manager.....	39
5.1.3.3	Check For Updates .....	39
5.1.3.4	About.....	39



5.1.4	Compact Mode .....	40
5.2	Workflow List.....	42
5.2.1	Workflow List Title Bar Context Menu.....	43
5.2.2	Folder Title Bar Context Menu .....	43
5.2.3	Working With Folders .....	43
5.2.3.1	Creating A New Workflow.....	43
5.2.3.2	Creating Folders .....	43
5.2.3.3	Naming/Renaming Folders.....	44
5.2.3.4	Expand/Collapse Folders .....	44
5.2.3.5	Move Folders.....	44
5.2.3.6	Delete Folders .....	45
5.2.4	Working With Workflows.....	45
5.2.4.1	Selecting Multiple Workflows.....	45
5.2.4.2	Using The Workflow Context Menu (With Multiple Workflows).....	45
5.2.4.3	Scheduling Workflows .....	45
5.2.4.4	Copy/Paste Workflows .....	46
5.2.4.5	Delete Workflows .....	48
5.2.4.6	Sort Workflows .....	48
5.2.4.7	Reordering Workflows .....	48
5.2.4.8	Viewing Activity Windows .....	49
5.2.5	Exporting .....	49
5.2.5.1	Exporting Workflows.....	49
5.2.5.2	Exporting Folders .....	50
5.2.6	Importing Workflows .....	50
5.2.7	Using The Import Wizard.....	50
5.3	Preview Area.....	52
5.3.1	Using The Context Menu .....	52
5.4	Activity Panes.....	52
5.4.1	Using The Context Menu .....	53
5.4.2	Using Files in the Activity Pane .....	53
5.4.3	Log Viewer.....	55
5.4.3.1	Log Settings .....	57
5.4.3.2	Clear All and Log Level Options .....	58
5.5	Features and Functions .....	59
5.5.1	Workflow List .....	59
5.5.2	Show/Hide Views.....	59
5.5.3	Additional Controls.....	60
5.5.4	Workflow Activity Panel .....	60
5.6	Workflow Views.....	61
5.6.1	Workflows - Pinned/Unpinned .....	61
5.6.2	Activity Pane Views .....	62
5.6.3	Hiding The Workflow List, View, Or Activity .....	62
5.7	Working With Running Workflows .....	63
5.8	Running A Sample Workflow .....	64
6.0	Using The Workflow Builder .....	68
6.1	Menus .....	68
6.2	Menu Bar Icons.....	68
6.3	Additional Features .....	69
6.4	Properties Panel (Visual Attributes) .....	70
6.5	Work Area Properties.....	71
6.5.1	Default Error Nodes .....	72
6.5.2	Background Image.....	72
6.5.3	Layout.....	73
6.5.4	Default Settings .....	75
6.5.4.1	Set Defaults.....	75
6.5.4.2	Restore Defaults.....	75
6.6	File Menu .....	76
6.7	Edit Menu .....	77
6.7.1	Add to Favorites.....	78
6.7.2	Select All.....	82
6.7.3	Language Manager.....	83



6.7.3.1	Adding a New Language .....	85
6.7.3.2	Filtering.....	86
6.7.3.3	Applying Language Changes .....	87
6.7.3.4	Editing an Existing Language .....	88
6.7.3.5	Exporting/Importing Language .....	89
6.8	View Menu .....	91
6.9	Insert Menu .....	93
6.9.1	Insert Multiple Pages .....	94
6.10	Shape Menu.....	94
6.11	Project Menu.....	95
6.12	Help Menu.....	95
6.13	Drawing Tools .....	95
6.13.1	Select and Resize .....	96
6.13.1.1	Multiple Select.....	97
6.13.2	Text Box Drawing Tool.....	98
6.13.3	Rectangles and Circles .....	100
6.13.4	Set Color Defaults.....	100
6.13.5	Lines and Arrows .....	101
6.13.6	Rotate Shapes .....	102
6.14	Connectors.....	103
6.14.1	Connector Definition .....	105
6.14.2	Multiple Connectors to the Same Output .....	106
6.15	Node Properties (Visual).....	107
6.15.1	Copy and Paste Nodes .....	109
6.15.2	Grouping and Order .....	110
6.15.3	Change Icon.....	111
6.15.3.1	Selecting From Canvas Icon Library .....	111
6.15.3.2	Selecting From Your Own Images.....	111
6.15.4	Node Label or Text Box .....	113
7.0	Building a Workflow .....	114
7.1	Create a Workflow.....	114
7.2	Define Nodes .....	116
7.2.1	Collection Point - Input Folder .....	117
7.2.2	Collection Point - Konica Minolta® MFP .....	120
7.2.3	MFP Explorer.....	122
7.2.4	Collection Point - Konica Minolta® bEST Node.....	125
7.2.4.1	MFP Registration.....	125
7.2.4.2	MFP Discovery .....	126
7.2.4.3	Settings .....	126
7.2.4.4	Manually Adding an MFP .....	127
7.2.4.5	Registration .....	129
7.2.4.6	Deleting .....	129
7.2.4.7	Editing .....	130
7.2.4.8	Security .....	130
7.2.4.9	bEST Node Setup .....	132
7.2.4.10	Running a bEST Workflow .....	134
7.3	Processes .....	137
7.3.1	Standard .....	137
7.3.2	Optional .....	137
7.3.3	Supported Files For Imaging Processes.....	138
7.4	Process - Annotate.....	139
7.5	Process - Deskew .....	142
7.6	Process - Despeckle .....	144
7.7	Process - Merge.....	146
7.7.1	Process - Mirror Image .....	148
7.7.1.1	Using The Tool Bar .....	149
7.7.1.2	Uploading Another Sample Document .....	149
7.7.2	Process - Negative Image .....	150
7.7.2.1	Using The Tool Bar .....	151
7.7.2.2	Uploading Another Sample Document .....	151
7.8	Process - Rename .....	152



7.9	Process - Split.....	154
7.9.1	Split By Pages .....	154
7.9.2	Split By Metadata.....	154
7.10	Process - Watermark .....	156
7.11	Distribution Points (Output) .....	159
7.11.1	Distribution Point - Directory/Folder .....	159
7.11.1.1	Using Dynamic Variables .....	161
7.11.1.2	Using Dynamic Variables Together .....	162
7.11.1.3	Special Note About Output Folders .....	163
7.11.2	Distribution Point - Printer (MFP) .....	165
7.11.2.1	Windows Printing.....	165
7.11.2.2	LPR Printing .....	166
7.11.2.3	RAW File Printing .....	167
7.11.3	Distribution Point - SMTP Out .....	169
7.11.3.1	Using Dynamic Variables For Email Header Metadata .....	170
7.11.4	Distribution Point - FTP .....	173
8.0	Running Workflows .....	176
8.1	Workflow List, Preview and Activity Pane .....	177
8.2	Run a Valid Workflow.....	182
8.3	Edit a Workflow .....	183
8.4	Saving the Workflow .....	184
8.5	Workflow Animation .....	185
8.6	Schedule a Workflow .....	186
9.0	Optional Nodes .....	189
9.1	Collection Point - LPR In Node.....	189
9.1.1	Using This Node .....	189
9.1.2	Step #1 Configuring The LPR Port .....	190
9.1.3	Step # 2 Configuring the LPR In Node.....	195
9.1.4	Step # 3 Starting the Windows Service.....	196
9.1.5	Step # 4 Starting the LPR Service .....	197
9.2	Collection Point - SMTP In .....	200
9.2.1	SMTP Header Metadata .....	200
9.2.2	Using This Node .....	200
9.2.3	Step #1 Configure Your MFP.....	200
9.2.4	Step #2 Configure The SMTP In Node .....	202
9.2.5	Step #3 Run SMTP Service .....	205
9.2.6	Step # 4 Scan Documents To Email .....	205
9.3	Dispatcher Pro Port.....	207
9.3.1	Setting up the Dispatcher Pro Port on Windows .....	207
9.3.2	Set up the Dispatcher Pro Port on Windows Vista / Windows 7 .....	208
9.4	Process - Advanced Bates Stamp.....	210
9.4.1	Bates Stamp List.....	211
9.4.2	Edit Stamps Area.....	211
9.4.3	Components Area.....	212
9.4.4	Tool Bar .....	213
9.4.5	Using The Advanced Bates Stamp Window .....	215
9.4.5.1	Uploading Sample Documents .....	215
9.4.5.2	Shrinking and Shifting The Content Of The Page.....	216
9.4.5.3	Specifying Margins .....	218
9.4.5.4	Creating A Bates Stamp .....	218
9.4.5.5	Positioning and Sizing Bates Stamps For Different Document Sizes .....	220
9.4.5.6	Specifying Absolute Measurements For The Bounding Box.....	221
9.4.5.7	Bates Stamp Naming Components .....	221
9.4.5.8	Editing A Bates Stamp.....	226
9.5	Process - Barcode Generator .....	227
9.6	Process - Advanced OCR .....	228
9.6.1	Zone List.....	229
9.6.2	Preview Area .....	229
9.6.3	Tool Bar .....	229
9.6.4	Using The Advanced OCR Window.....	230
9.6.4.1	Creating A Zone (Manually).....	231



9.6.4.2	Creating Zones (Automatically)	232
9.6.4.3	Repositioning Zones	232
9.6.4.4	Defining Type/Content For Zone	232
9.6.4.5	Specifying Page Ranges To Process	233
9.6.4.6	Choosing An Output Format	233
9.7	Process - 2D Barcode Processing	235
1.1.1	Zone List	236
1.1.2	Preview Area	236
1.1.3	Tool Bar	236
1.1.4	Using The 2D Barcode Processing Window	237
1.1.4.1	Creating A Zone (Manually)	238
1.1.4.2	Creating Zones (Automatically)	239
1.1.4.3	Repositioning Zones	239
1.1.4.4	Specifying Page Ranges To Process	239
9.8	Process - Barcode Processing	241
9.8.1	Barcode Types To Detect	242
9.8.1.1	Recognized Barcodes	242
9.8.2	Zone List	243
9.8.3	Preview Area	243
9.8.4	Tool Bar	243
9.8.5	Using The Barcode Processing Window	244
9.8.5.1	Specifying Barcodes To Detect	245
9.8.5.2	Creating A Zone (Manually)	245
9.8.5.3	Creating Zones (Automatically)	246
9.8.5.4	Repositioning Zones	246
9.8.5.5	Specifying Page Ranges To Process	246
9.9	Process - Color Route	248
9.10	Process - Convert To Office	249
9.11	Process - Convert To PDF	251
9.12	Process - Convert to PS	255
9.13	Process - Email Parser	256
9.13.1	Using The Email Parser Node	256
9.13.2	Extracting Attachment Files And Headers	257
9.13.3	Parsing Email Header Metadata	257
9.14	Process - Highlight/Strikeout	261
9.14.1	Search For Highlight and/or Strikeout	262
9.14.2	Examples Of Search And Highlight/Strikeout	264
9.15	Process - Insert	267
9.16	Process - KDK Code Generator	269
9.17	Process - KDK Converter	270
9.18	Process - Page Count Route	271
9.19	Overview Of Parsing	273
9.19.1	All Previous Occurrences Example	273
9.19.2	Process - Parse (Search)	276
9.19.3	Process - Parse & Distribute	278
9.19.4	Process - Parse & Insert	281
9.19.5	Process - Parse & Replace	285
9.20	Process - Metadata To File	288
9.21	Process - Metadata Route	291
9.21.1	Using The Metadata Route Node Window	291
9.21.2	Setting Up Metadata Rules	292
9.21.2.1	Step #1: Selecting Metadata	292
9.21.2.2	Step #2: Specifying Conditions And Values	293
9.21.2.3	Specifying Page Ranges For Processing	293
9.22	Process - Print to File	295
9.22.1	Supported Operating Systems	296
9.23	Process - Redact	297
9.23.1	Search For Redaction	298
9.23.2	Examples Of Search And Redact	300
9.24	OCR Settings	302
9.24.1	OCR Preprocessing Settings	302



9.24.1.1	Image Pre-processing Settings .....	303
9.24.1.2	Rotation .....	304
9.24.2	Recognition Settings .....	305
9.24.2.1	Languages and dictionaries.....	305
9.24.2.2	Recognition Options .....	306
9.24.3	Output .....	307
9.24.3.1	Output.....	307
9.24.3.2	Fonts and Characters .....	308
Appendix A.	Use Cases .....	309
Appendix B.	Tutorials .....	313
B-1	Parsing .....	313
B-1.1	Create A Workflow.....	314
B-1.2	Create/Customize The Input Folder.....	314
B-1.3	Create An Output Folder To Store Original Files .....	315
B-1.4	Search For Beginning Of Page/Make All Pages White.....	316
B-1.5	Search For Return Stub/Insert Make Paper Type Blue Commands .....	317
B-1.6	Search For Return Stub.....	319
B-1.7	Search For Page After Return Stub/Insert Blank Blue Page.....	320
B-1.8	Create Distribution Folder.....	321
B-1.9	Create Output Folder For Errors .....	322
B-1.10	Connect The Nodes .....	323
	Validate The Workflow .....	325
Appendix C.	Regular Expressions .....	326
C-1	Examples .....	327
C-1.1	Content Search.....	327
C-1.2	File Name Search.....	328
Appendix D.	System-Defined Variables .....	329
Appendix E.	Troubleshooting .....	331
E-1	Error Messages .....	331
E-2	Other Troubleshooting Solutions.....	337



## TABLE OF FIGURES

Figure 1. Installation screen .....	8
Figure 2. Installation - Select Additional Tasks .....	9
Figure 3. Installation - Restart system messages.....	10
Figure 4. Add-In Manager executable .....	11
Figure 5. Add-In Manager - Uninstall progress messages .....	12
Figure 6. Add-In Manager - Updates.....	13
Figure 7. Add-In Manager - Installing Updates progress messages.....	13
Figure 8. Add-In Manager - Available to Install .....	14
Figure 9. Add-In Manager - Install progress messages.....	14
Figure 10. Add-In Manager - using the Search field .....	15
Figure 11. Registration screen .....	16
Figure 12. Demo version - automatic web registration .....	17
Figure 13. SEC website home page.....	18
Figure 14. Registration on SEC website .....	18
Figure 15. SEC website - to register your application .....	18
Figure 16. Lock code and Select Product .....	19
Figure 17. Registering - thank you .....	19
Figure 18. Demo version - activating product.....	20
Figure 19. Full version - automatic web registration .....	21
Figure 20. Full version - activating product .....	22
Figure 21. Upgrade version - automatic web registration .....	23
Figure 22. Help menu - registering add-ins .....	24
Figure 23. Registering add-ins .....	25
Figure 24. SEC website - selecting add-ins .....	26
Figure 25. Registering add-ins .....	26
Figure 26. Add-ins - manual registration .....	27
Figure 27. Licensing.....	28
Figure 28. Licensing example .....	29
Figure 29. License manager .....	30
Figure 30. Connect to workflow services window.....	30
Figure 31. Main application window .....	31
Figure 32. Tool bar.....	32
Figure 33. Options window - General Configurations.....	33
Figure 34. Options window - Usage Threshold Configurations .....	34
Figure 35. Options window - Log Level Configurations .....	35
Figure 36. Options window - SMTP Service Configurations.....	36
Figure 37. Options window - SMTP Manager .....	37
Figure 38. Options window - LPR Service Configurations.....	38
Figure 39. Customer feedback.....	39
Figure 40. About window.....	40
Figure 41. License Information window.....	40
Figure 42. Compact mode view.....	41
Figure 43. Workflow List.....	42
Figure 44. Workflow List Menu .....	43
Figure 45. Folder Menu .....	43
Figure 46. Renaming Folder .....	44
Figure 47. Select a Folder window .....	46
Figure 48. Copied workflow.....	47
Figure 49. Copied workflow - changes made .....	48
Figure 50. Exported workflow(s) icon .....	49
Figure 51. Export Workflow(s) window.....	50
Figure 52. Import Wizard.....	51
Figure 53. Import workflows - choose file type .....	51
Figure 54. Import Wizard - create new folder .....	52
Figure 55. Activity panes context menu .....	53
Figure 56. Delete file message.....	54
Figure 57. Copying/moving files .....	54
Figure 58. Right-click on Input Folder header bar .....	55
Figure 59. Right-click on Input Folder name .....	55



Figure 60. Printer output node options .....	55
Figure 61. Activity Log viewer .....	56
Figure 62. Specifying logging preferences .....	57
Figure 63. Log level.....	58
Figure 64. Main screen .....	59
Figure 65. Show/hide views .....	60
Figure 66. Additional menu icons .....	60
Figure 67. Sample workflow activity panel .....	60
Figure 68. "Pinned" workflow .....	61
Figure 69. "Unpinned" workflow .....	61
Figure 70. Activity pane views .....	62
Figure 71. No workflow list displayed .....	62
Figure 72. Main screen with all workflow previews hidden .....	63
Figure 73. Paused workflow .....	63
Figure 74. Sample exercise .....	64
Figure 75. Sample exercise - output folder node.....	65
Figure 76. Sample exercise - saving .....	66
Figure 77. Sample exercise - starting workflow messages .....	66
Figure 78. Sample exercise - activity log.....	67
Figure 79. Workflow builder menus .....	68
Figure 80. Menu bar options .....	68
Figure 81. Workflow builder - features .....	69
Figure 82. Properties panel.....	70
Figure 83. Properties panel - edit node properties .....	70
Figure 84. Properties panel - closing .....	71
Figure 85. Work area properties panel.....	71
Figure 86. Workflow builder - properties panel pin or float .....	72
Figure 87. Background image enabled and set to "Fit to Canvas" .....	73
Figure 88. Background image with show gridlines selected .....	73
Figure 89. Layout - using the stroke slider .....	74
Figure 90. Layout - changing multiple objects .....	74
Figure 91. Workflow builder - file menu .....	76
Figure 92. Export window.....	76
Figure 93. Page setup.....	77
Figure 94. Paste original option .....	78
Figure 95. Lock feature .....	78
Figure 96. Add to favorites context menu.....	79
Figure 97. Add to favorites .....	80
Figure 98. Adding/removing nodes from Favorites Group.....	80
Figure 99. Organize favorites .....	81
Figure 100. Organize favorites - setting defaults .....	82
Figure 101. Select all .....	82
Figure 102. Using the select/resize tool to select multiple objects .....	83
Figure 103. Language manager first screen .....	84
Figure 104. Create new language window .....	85
Figure 105. Language translation window.....	86
Figure 106. Language translation window - filtering .....	87
Figure 107. Language manager - new language added.....	87
Figure 108. Language manager - editing an existing language .....	88
Figure 109. Language manager - saving .....	89
Figure 110. Language manager - exporting a language .....	89
Figure 111. Exported language opened in Microsoft Excel .....	90
Figure 112. Import as.....	90
Figure 113. Workflow builder - no toolbars.....	91
Figure 114. Keyboard shortcuts .....	92
Figure 115. Workflow builder - text tool .....	93
Figure 116. Workflow builder - zoomed out.....	94
Figure 117. Drawing tools (example) .....	96
Figure 118. Select/resize .....	97
Figure 119. Rotating objects .....	97
Figure 120. Multiple select .....	98
Figure 121. Text box drawing tool .....	98



Figure 122. Changing text properties .....	99
Figure 123. Changing font and font size .....	99
Figure 124. Changing properties of rectangles and circles .....	100
Figure 125. Setting color defaults .....	101
Figure 126. Line style examples .....	101
Figure 127. Rotating shapes .....	102
Figure 128. Connectors - examples .....	103
Figure 129. Connectors - color picker .....	104
Figure 130. Connectors - hide symbols .....	104
Figure 131. Connectors - specifying type .....	105
Figure 132. Connectors - example .....	105
Figure 133. Connectors - multiple connectors to same output .....	106
Figure 134. Properties panel - examples .....	107
Figure 135. Node specific window .....	108
Figure 136. Nodes - dropped on canvas vs. dragged to resize .....	108
Figure 137. Layout, text, and color properties of nodes .....	109
Figure 138. Send to back .....	110
Figure 139. Grouping .....	110
Figure 140. Change icon - from canvas icon library .....	111
Figure 141. Change icon - from your own images .....	112
Figure 142. Change icon - from file .....	112
Figure 143. Change icon - from clipboard .....	113
Figure 144. Text section of properties panel .....	113
Figure 145. Building a workflow .....	114
Figure 146. Building a workflow - naming the workflow .....	115
Figure 147. Building a workflow - three nodes connected .....	115
Figure 148. Building a workflow - validate .....	116
Figure 149. Building a workflow - input folder .....	117
Figure 150. Building a workflow - disabling a node .....	117
Figure 151. Map Network Drive .....	118
Figure 152. Building a workflow - MFP .....	120
Figure 153. Building a workflow - MFP authentication .....	122
Figure 154. Building a workflow - MFP Explorer .....	123
Figure 155. Building a workflow - MFP Explorer device details .....	123
Figure 156. Building a workflow - MFP Explorer settings .....	123
Figure 157. Building a workflow - bEST Node .....	125
Figure 158. Building a workflow - Launching MFP Registration .....	126
Figure 159. Building a workflow - MFP Registration Tool .....	126
Figure 160. Building a workflow - bEST Server Settings .....	127
Figure 161. Building a workflow - add MFP .....	128
Figure 162. Building a workflow - MFP Registration .....	129
Figure 163. Edit MFP device .....	130
Figure 164. Entering administrator password on MFP .....	131
Figure 165. MFP Network Settings screen .....	131
Figure 166. MFP WebDav Settings .....	132
Figure 167. Building a workflow - bEST Node Setup .....	133
Figure 168. Building a workflow - running a bEST workflow .....	134
Figure 169. Building a workflow - MFP panel .....	135
Figure 170. List of bEST workflows (graphical) .....	136
Figure 171. List of bEST workflows (native) .....	136
Figure 172. Details of scan settings (graphical) .....	136
Figure 173. Details of scan settings (native) .....	136
Figure 174. Annotation node window instructions .....	139
Figure 175. Annotation node window .....	140
Figure 176. Annotation node window - wrapping text .....	141
Figure 177. Deskew node window .....	142
Figure 178. Deskew - search settings .....	143
Figure 179. Despeckle node window .....	144
Figure 180. Despeckle example .....	145
Figure 181. Merge node window .....	146
Figure 182. Mirror Image Node .....	148
Figure 183. Mirror Image Node - Uploading Sample Document .....	149



Figure 184. Negative Image Node .....	150
Figure 185. Mirror Image Node - Uploading Sample Document .....	151
Figure 186. Rename node window.....	152
Figure 187. Split node window .....	154
Figure 298. <i>Split Node - Rules example</i> .....	155
Figure 188. Watermark node window.....	156
Figure 189. Watermark node - using the eyedropper.....	157
Figure 190. Output folder node window .....	159
Figure 191. Map Network Drive.....	160
Figure 192. Output folder node - dynamic date and time variables .....	162
Figure 193. Dynamically created output folder .....	162
Figure 194. Output folders .....	163
Figure 195. Printer node window - Windows printing .....	165
Figure 196. Select a Printer window.....	166
Figure 197. Printer node window - LPR printing.....	166
Figure 198. Printer node window - RAW file printing.....	167
Figure 199. SMTP Out node window .....	169
Figure 200. SMTP Out node - using substitution variables .....	171
Figure 245. FTP node window .....	173
Figure 201. Main screen .....	176
Figure 202. Main screen views.....	177
Figure 203. Workflow icons .....	177
Figure 204. Workflow list hidden .....	178
Figure 205. Workflow .....	179
Figure 206. Activity pane views.....	180
Figure 207. Activity log hidden .....	181
Figure 208. Starting workflow message .....	182
Figure 209. Running a valid workflow .....	183
Figure 210. Double-click on workflow to edit.....	184
Figure 211. Workflow animation.....	185
Figure 212. Animation speed .....	185
Figure 213. Workflow Scheduler - standard .....	186
Figure 214. Workflow Scheduler - advanced .....	187
Figure 215. Control Panel .....	190
Figure 216. Selecting Printer properties.....	191
Figure 217. Print to port .....	191
Figure 218. Available port types .....	192
Figure 219. Add Standard TCP/IP Printer Port Wizard .....	192
Figure 220. Add port .....	193
Figure 221. Additional port information required .....	193
Figure 222. Printer Port Wizard summary .....	194
Figure 223. Printer Ports window - Close.....	194
Figure 224. Printer Properties - Apply .....	195
Figure 225. LPR In node window .....	195
Figure 226. Windows Run window.....	196
Figure 227. Windows Services for LPR Service.....	197
Figure 228. LPR Manager.....	198
Figure 229. Entering administrator password on MFP .....	200
Figure 230. MFP Network Settings screen.....	201
Figure 231. MFP Email Settings screen.....	201
Figure 232. MFP Email TX screen .....	202
Figure 233. Entering IP address on MFP panel .....	202
Figure 234. SMTP In node.....	203
Figure 235. SMTP In - Available MFPs .....	204
Figure 236. SMTP In - Selected MFPs.....	204
Figure 237. Manually Add MFP.....	205
Figure 238. Sending email from MFP.....	206
Figure 239. Entering email address on MFP panel .....	206
Figure 240. Dispatcher Pro Port: Windows - Properties of printers .....	207
Figure 241. Dispatcher Pro Port: Windows - Ports tab.....	207
Figure 242. Dispatcher Pro Port: Windows Vista/7- Properties of printers .....	208
Figure 243. Dispatcher Pro Port: Windows Vista/7- Properties of printers, classic view .....	209



Figure 244. Dispatcher Pro Port: Windows Vista/7- Printer ports .....	209
Figure 246. Advanced Bates Stamp node.....	210
Figure 247. Bates Stamp List.....	211
Figure 248. Bates Stamp - Edit Stamps area.....	211
Figure 249. Bates Stamp - Design area .....	212
Figure 250. Advanced Bates Stamp - results .....	213
Figure 251. Bates Stamping - select an image.....	216
Figure 252. Bates Stamp - Shrink .....	216
Figure 253. Bates Stamp - example of shrinking content.....	217
Figure 254. Bates Stamp - example of shifting content.....	218
Figure 255. Bates Stamps - positioning .....	219
Figure 256. Bates Stamps on different sized documents .....	220
Figure 257. Bates Stamp dimensions .....	221
Figure 258. Barcode Generator Node .....	227
Figure 259. Advanced OCR Node.....	228
Figure 260. Advanced OCR - Adding a new zone.....	231
Figure 261. 2D Barcode Processing Node.....	235
Figure 262. 2D Barcode processing - Adding a new zone .....	238
Figure 263. Barcode Processing Node .....	241
Figure 264. Barcode Processing - Select type .....	242
Figure 265. Barcode processing - Adding a new zone.....	245
Figure 264. Color Route Node .....	248
Figure 265. Convert to Office Node.....	249
Figure 266. Convert to PDF node .....	251
Figure 267. Convert to PDF Security Settings .....	252
Figure 268. Permissions password .....	254
Figure 269. Password security settings.....	254
Figure 270. Convert To PS node window.....	255
Figure 271. Email Parser node.....	256
Figure 272. Email Parser - Extract options.....	257
Figure 273. Email Parser - parsing rules .....	258
Figure 274. Email parser node - parsing & forwarding original email.....	259
Figure 275. Email parser node - parsing & extracting files and headers .....	260
Figure 276. Highlight/Strikeout Node .....	261
Figure 277. Highlight/Strikeout - Search for fields.....	262
Figure 278. Highlight/Strikeout - cut, copy, paste context menu .....	262
Figure 279. Highlight/Strikeout - Multiple Searches .....	263
Figure 280. Highlight/Strikeout - Example #1 .....	264
Figure 281. Highlight/Strikeout - Example #2 .....	265
Figure 282. Highlight/Strikeout - Example #3.....	265
Figure 283. Insert node window .....	267
Figure 284. KDK Code Generator Node .....	269
Figure 285. KDK Converter Node .....	270
Figure 286. Page Count Route Node .....	271
Figure 287. Page Count Route - In Between Operator .....	272
Figure 288. All previous occurrences - step 1 of example.....	274
Figure 289. All previous occurrences - results of "New Page" search.....	274
Figure 290. All previous occurrences - step 2 of example.....	275
Figure 291. All previous occurrences - results of "All Previous Occurrences" search .....	275
Figure 292. Parse node window.....	276
Figure 293. Parse node -outbound connectors .....	277
Figure 294. Parse & Distribute node window .....	278
Figure 295. Parse & Insert node window .....	281
Figure 296. Parse & Replace node window .....	285
Figure 297. Metadata to File .....	288
Figure 298. Metadata Route Node.....	291
Figure 298. Metadata Route - setting up rules .....	292
Figure 298. Metadata Route Node - Select Metadata Key.....	293
Figure 298. Metadata Route Node - Rules example .....	293
Figure 299. Print to File node window .....	295
Figure 300. Redact Node .....	297
Figure 301. Redaction - cut, copy, paste context menu .....	298



Figure 302. Redaction - Multiple Searches .....	299
Figure 303. Redact- Example #1.....	300
Figure 304. Redact- Example #2.....	300
Figure 305. Redact- Example #3.....	301
Figure 271. OCR Pre-process Settings.....	303
Figure 272. OCR Recognition Settings .....	305
Figure 273. OCR Output Settings .....	307
Figure 307. Parser Process Case Study #1 .....	310
Figure 308. Parser Process Case Study #2 .....	311
Figure 309. Parser Process Case Study #3 .....	312
Figure 310. Tutorial - naming the workflow .....	314
Figure 311. Tutorial - defining the Input Folder .....	315
Figure 312. Tutorial - creating the originals output folder .....	316
Figure 313. Tutorial - Parse and Insert white paper commands.....	317
Figure 314. Tutorial - Parse and Insert blue paper commands .....	319
Figure 315. Tutorial - Parse and Distribute .....	320
Figure 316. Tutorial - Parse and Replace .....	321
Figure 317. Tutorial - Output Folder.....	322
Figure 318. Tutorial - Error Output Folder .....	323
Figure 319. Tutorial - connecting the workflow.....	324
Figure 320. Tutorial - connecting to Error Folder.....	325
Figure 321. Tutorial - Validation message.....	325