Dispatcher ScanTrip Cloud

User Manual

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

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Get Started

Getting Started

Konica Minolta’s Dispatcher ScanTrip Cloud is a fully cloud-based workflow automation product that optimizes business processes, reduces costs, and increases productivity for any organization. Dispatcher ScanTrip Cloud includes a robust set of document processing features that can be accessed from anywhere. Using our graphical **Workflow Designer**, you can create workflows quickly and easily to meet all your document processing needs.

Get to Know Dispatcher ScanTrip Cloud

The navigation bar on the left-hand side of the screen contains the major elements of Dispatcher ScanTrip Cloud. These include:

- **Workflows** - Manage your Dispatcher ScanTrip Cloud workflows here. The Workflow Builder tool can be accessed from this page.
- **Dashboard** - A reporting tool that allows you to see User, Device, and Workflow usage.
- **Devices** - Manage your MFP inputs here.
- **Users** - Manage new and existing users here.
- **Forms** - Manage your Dispatcher Stratus forms here. The Form Builder tool can be accessed from this page.
- **Logs** - View and filter the complete list of internal notifications generated from your Dispatcher Stratus tenant.

Tenant Selector

At the top of the screen, you will see the name of your tenant. If you have access to more than one tenant, a down arrow will appear next to the tenant name. To select a new tenant, do the following:

1. Click the tenant name or the arrow next to it.
2. Select a tenant name from the drop-down list.

You will automatically be taken to the new tenant.

If you do not see a tenant that you are a member of in the list of available tenants, you can manually add it to the list by entering the tenant URL in the field provided.

Notifications

At the top of the screen, on the right-hand side, you will see the Notifications icon. When there are notifications available for you, a red bubble will appear with the number of notifications that require your attention. Clicking on the icon will open a brief description of the notification and alert you to any necessary steps.

Menu

In the upper-right hand corner of the screen, you will see your username. Clicking on your username will open a drop-down menu with several options, depending on your **User Role**:

- **Switch to Manager** - Switch from a User or Tenant Admin role to Tenant Manager role. This option will only appear if you have the Tenant Manager role for a tenant.
- **Profile** - View and edit information and settings within your user account, including appearance, out of office, user preferences, etc.
- **Send Feedback** - Ask questions, leave comments, and report issues with Dispatcher ScanTrip Cloud .
- **Help** - Open the Dispatcher ScanTrip Cloud Online Help (the site you are currently looking at).
- **Settings** - View and edit aspects of your tenant, including licenses, tenant name, time zone, language, SAML, etc.
- **Logout** - End your current connection to a Dispatcher ScanTrip Cloud tenant. You will need to log in again to access your tenant.

More Helpful Links to Get You Started

Below are listed some more helpful links that you may need in order to get your tenant up and running. Feel free to browse the Dispatcher ScanTrip Cloud Online Help for more information.

MFP App
Learn more about using the Dispatcher ScanTrip Cloud App for easy workflow access at any supported MFP.

Licensing
Learn more about the differences between Dispatcher Stratus and Dispatcher ScanTrip Cloud.

Tenancies and Onboarding
Learn more about redeeming your Dispatcher ScanTrip Cloud purchase code, selecting a role in your new tenant, and getting your tenancy up and running.

Workflow Designer The Workflow Designer was created to enable general users to effortlessly build unique document workflows in a WYSIWYG (What You See Is What You Get) manner, to meet your needs and allow collaboration with other team members. It streamlines workflow creation by eliminating the need for extensive coding knowledge, providing a clear visual depiction of the document flow, and offering an intuitive environment with user-friendly features.

Licensing

This page is dedicated to the licensing of Dispatcher Stratus and Dispatcher ScanTrip Cloud, both as a solution and the device and user licenses contained within a tenant. This page contains the following major sections:

- **Dispatcher Stratus Nodes**
- **Dispatcher ScanTrip Cloud Nodes**
- **Upgrading Licenses**
- **Licensing Feature Breakdown**
- **Device Licensing**
- **User Licensing**

Dispatcher Stratus is available for purchase in several different configurations, each tailored to meet different needs. Dispatcher ScanTrip Cloud contains a reduced number of workflow nodes and features but at significantly reduced prices.

- **Dispatcher Stratus** - A robust workflow solution that goes beyond automation to helping organizations The most popular configuration, designed for maximum capability, scalability, and power. Dispatcher Stratus includes the People Nodes for additional interaction during automated workflows. Dispatcher Stratus is available in three licensing tiers, **described in detail below**:
    - Starter - The Starter tier focuses on linear workflows with simple, effective automation.
    - Business - The Business tier includes additional processing features and introduces People-Based Workflows.
    - Enterprise - The Enterprise tier includes all functionality available in Dispatcher Stratus and is designed to help organizations digitize and manage many processes.
- **Dispatcher ScanTrip Cloud** - A simplified scan-to-cloud solution, with OCR capabilities and basic automation capabilities.

Dispatcher Stratus Nodes

The following sections List the Nodes available in Dispatcher Stratus, Grouped by Node type.

Note: Nodes may be limited by **licensing tier**.

Collection Nodes

Node	Description
Dropbox In	Collects files from a Dropbox folder.
External Form	Collects information from a form that is available to users outside of Dispatcher Stratus.
Internal Form	Collects information from a form accessible within Dispatcher Stratus.
MFP Capture	Initiates workflows directly from a Konica Minolta MFP panel.
Microsoft Exchange In	Collects emails and attachments from a Microsoft Exchange email account.
Upland InterFAX In	Collects faxes from a connected Upland InterFAX account.

Process Nodes

Node	Description
Assign Owner	Select a user to become the owner of a job.
Annotation	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.
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.
Flatten Form	Select from the available forms to save any form submissions as a PDF.
Form Selector	Select from the available forms to display to a workflow user at scan.
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.
ODBC	Retrieves data from or updates data in an ODBC (Open Database Connectivity) data source.
People Group	Sends a job to a member of a Dispatcher Stratus group for additional interaction.
People Queue	Sends a job to a Dispatcher Stratus job queue, where it can be claimed for additional interaction.
People User	Sends a job to a Dispatcher Stratus user for additional interaction.
People - Edit and Approve	Sends a job to a licensed tenant member, who can then view and/or edit documents in the workflow.
Rename	Changes the file name using variables, counters, or static text.

Distribution Nodes

Node	Description
Box Connector	Scans, indexes, and distributes files to Box.com at the MFP or via an automated workflow.
Paragon Cloud Fax Connector	Distributes documents to the Paragon cloud-based fax service.
Send to Dispatcher Phoenix	Distributes documents to a connected Dispatcher Phoenix installation.
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.
End	Terminates a workflow that would otherwise end at one of the People nodes.
Google Drive Connector	Scans, indexes, and distributes files to Google Drive at the MFP or via an automated workflow.
OneDrive Connector	Scans, processes, and distributes files to Microsoft OneDrive at the MFP or via an automated workflow.
OneDrive for Business Connector	Scans, processes, and distributes files to Microsoft OneDrive for Business at the MFP or via an automated workflow.
SharePoint Online Connector	Connects to Microsoft SharePoint Online, browses through SharePoint Online folders, and uploads documents to SharePoint Online repositories.
Upland InterFAX Connector	Connects to an Upland InterFAX account for fax distribution.
WebDAV Connector	Scans, indexes, and distributes files to a generic WebDAV Server at the MFP or via an automated workflow.

Dispatcher ScanTrip Cloud Nodes

The following sections List the Nodes included in the Dispatcher ScanTrip Cloud base License, Grouped by Node type.

Collection Nodes

Node	Description
MFP Capture	Initiates workflows directly from a Konica Minolta MFP panel.

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.
Form Selector	Select from the available forms to display to a workflow User at scan.
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.com at the MFP or via an automated workflow.
Paragon Cloud Fax Connector	Distributes documents to the Paragon cloud-based fax service.
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.
OneDrive Connector	Scans, processes, and distributes files to Microsoft OneDrive at the MFP or via an automated workflow.
OneDrive for Business Connector	Scans, processes, and distributes files to Microsoft OneDrive for Business at the MFP or via an automated workflow.
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.

Upgrading Licenses

Dispatcher ScanTrip Cloud and Dispatcher Stratus Licenses can be upgraded to a higher product or tier. Licenses cannot be changed to a lower tier or product. For more information, contact your Konica Minolta representative.

Licensing Feature Breakdown

Dispatcher ScanTrip Cloud exists as a standalone product. Dispatcher Stratus is Licensed in three tiers: Starter, Business, and Enterprise.

Starter

The Dispatcher Stratus Starter tier focuses on linear workflows - simple automation in the cloud. These can help organizations streamline their document processing workflows and eliminate time-consuming manual processes like document renaming and archiving. Users have quick access to the Dispatcher Stratus portal and MFP workflows via SSO. This is ideal for organizations with high-volume document processing automation needs. Also included are a number of useful features that streamline Tenant management, like an analytics dashboard, Log repository, individual User profile Pages, Tenant-wide settings, and more.

Business

The Dispatcher Stratus Business tier expands on the previous tier with additional processing features, including basic People-Based Workflows. These allow for important human touch points within a workflow and can be customized to meet the needs of many organizations. This tier also includes custom Roles and permissions, for added security and Tenant personalization. This tier is perfect for organizations that need a mix of automation and human interaction.

Enterprise

Designed to address the varying needs of large organizations, the Dispatcher Stratus Enterprise tier provides powerful tools to implement a top-to-bottom process overhaul. The Enterprise tier massively expands on form collection options, including Internal and External Forms with Anonymous Authentication, forms that can be embedded in your organization’s website, form customization so they can match your organization’s branding, and a New Signature field for added security. This tier also includes additional People-Based Workflow options, such as the User Group Node, People Queue Node, Job Queues, and Job Tracker, making it the ideal solution to increase efficiency and collaboration throughout an organization.

The following chart breaks down the features available in each product and tier, so you can make an informed decision about what solution your organization needs:

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Tenant Management				
Redeem Purchase Code	Yes	Yes	Yes	Yes
View/Edit Unconfigured Tenants	Yes	Yes	Yes	Yes
Select Role	Yes	Yes	Yes	Yes
Select Tenant Group	Yes	Yes	Yes	Yes
Invite Tenant Admin	Yes	Yes	Yes	Yes
Cancel Invite	Yes	Yes	Yes	Yes
Resend Invite	Yes	Yes	Yes	Yes
Create Tenant Group	Yes	Yes	Yes	Yes
Rename Tenant Group	Yes	Yes	Yes	Yes
View Tenant Groups and Configured Tenants	Yes	Yes	Yes	Yes
View Tenant Manager Group Details	Yes	Yes	Yes	Yes
Delete Tenant Group	Yes	Yes	Yes	Yes
Remove Manager from Tenant Group	Yes	Yes	Yes	Yes
Send/Resend/Cancel Manager Invite	Yes	Yes	Yes	Yes
Set Notifications	Yes	Yes	Yes	Yes
Edit Tenant Group	Yes	Yes	Yes	Yes
Select Parent for Tenant Group	Yes	Yes	Yes	Yes
Redeem Purchase Code for Selected Tenant	Yes	Yes	Yes	Yes
View/Edit Tenant Details	Yes	Yes	Yes	Yes
Select Parent for Tenant	Yes	Yes	Yes	Yes
Edit Tenant Admin Info	Yes	Yes	Yes	Yes
View Tenant Management Dashboard	Yes	Yes	Yes	Yes
Quicklink to Tenant Admin Area	Yes	Yes	Yes	Yes
Search Tenants	Yes	Yes	Yes	Yes
Suspend Tenant Usage	No	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Access Tenant Management Dashboard Page	Yes	Yes	Yes	Yes
Filter Tenant Management Dashboard by Tenant and/or Date	Yes	Yes	Yes	Yes
Tenant Reports - Expiration Report	Yes	Yes	Yes	Yes
Export Report to PDF or CSV	Yes	Yes	Yes	Yes
Menuing				
Pin/Unpin Menu	Yes	Yes	Yes	Yes
Tenant Selector	Yes	Yes	Yes	Yes
Remove Tenant from Tenant Menu	Yes	Yes	Yes	Yes
Add Tenant to Tenant Menu	Yes	Yes	Yes	Yes
Send Feedback	Yes	Yes	Yes	Yes
Online Help	Yes	Yes	Yes	Yes
Notifications	Yes	Yes	Yes	Yes
Workflow Management				
Download Workflow Designer	Yes	Yes	Yes	Yes
Create New Workflow	Yes	Yes	Yes	Yes
Start/Resume Workflow	Yes	Yes	Yes	Yes
Pause Workflow	Yes	Yes	Yes	Yes
Stop Workflow	Yes	Yes	Yes	Yes
Edit Workflow	Yes	Yes	Yes	Yes
Copy Workflow	Yes	Yes	Yes	Yes
Paste Workflow	Yes	Yes	Yes	Yes
Delete Workflow	Yes	Yes	Yes	Yes
Import Workflow	Yes	Yes	Yes	Yes
Export Workflow	Yes	Yes	Yes	Yes
Share Workflow	Yes	Yes	Yes	Yes
View Workflow on Logs Activity	Yes	Yes	Yes	Yes
Pre-Installed Sample Workflows	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Online Sample Workflow Library	Yes	Yes	Yes	Yes
Sample Support Different Plans	Yes	Yes	Yes	Yes
Search Workflows	Yes	Yes	Yes	Yes
Workflow PreView	Yes	Yes	Yes	Yes
Workflow Activity Log	Yes	Yes	Yes	Yes
Hide/Display Workflow PreView	Yes	Yes	Yes	Yes
Hide/Display Workflow Activity Log	Yes	Yes	Yes	Yes
Open Activity Log in Logs Page	Yes	Yes	Yes	Yes
Create Private Workflow Group	Yes	Yes	Yes	Yes
Share Private Workflow Group	Yes	Yes	Yes	Yes
User & User Group Sharing Controls	Yes	Yes	Yes	Yes
Device & Device Group Sharing Controls	Yes	Yes	Yes	Yes
Transfer Workflow Group Ownership	Yes	Yes	Yes	Yes
Rename Workflow Group	Yes	Yes	Yes	Yes
Delete Workflow Group	Yes	Yes	Yes	Yes
Export Workflow Group	Yes	Yes	Yes	Yes
Attach Workflow to Customer Feedback Email	Yes	Yes	Yes	Yes
Profile				
View Account Information	Yes	Yes	Yes	Yes
Select Start Page	No	Yes	Yes	Yes
Add Quick Links to Navigation Pane	No	Yes	Yes	Yes
Select a Light or Dark Appearance for Page Background	No	Yes	Yes	Yes
Select a Color Scheme	No	No	Yes	Yes
Apply a Background Image	No	Yes	Yes	Yes
Select a Display Language	No	Yes	Yes	Yes
Admin Dashboard				

Feature	ScanTrip Cloud	Starter	Business	Enterprise
View Tenant Member Activity	Yes	Yes	Yes	Yes
View Tenant Document Activity by User, Device, and Workflow	Yes	Yes	Yes	Yes
View Document Collection Activity	Yes	Yes	Yes	Yes
Select or Specify Date Range	Yes	Yes	Yes	Yes
Devices				
Import Devices from Konica Minolta MarketPlace	Yes	Yes	Yes	Yes
View Licenses Available	Yes	Yes	Yes	Yes
View Licenses Used/Available	No	Yes	Yes	Yes
Add a Single Device	Yes	Yes	Yes	Yes
View Device Information for Imported Devices	Yes	Yes	Yes	Yes
Create Device Group	Yes	Yes	Yes	Yes
Edit Device Group Name	Yes	Yes	Yes	Yes
View Device Quantity Per Group	Yes	Yes	Yes	Yes
Select All Devices in a Group	Yes	Yes	Yes	Yes
Assign Device to Group	Yes	Yes	Yes	Yes
Sort Device Group Tables	Yes	Yes	Yes	Yes
Expand/Collapse Device Group Table Display	Yes	Yes	Yes	Yes
Execute Bulk Actions on Selected Devices	Yes	Yes	Yes	Yes
Move Device Group	Yes	Yes	Yes	Yes
Edit Device Description	Yes	Yes	Yes	Yes
Verify App Installation	Yes	Yes	Yes	Yes
License/UnLicense Device	Yes	Yes	Yes	Yes
Delete Device	Yes	Yes	Yes	Yes
Search Devices	Yes	Yes	Yes	Yes
Add a Non-MFP Device	No	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Assign Non-MFP Licenses	No	Yes	Yes	Yes
Transfer Non-MFP Licenses	No	Yes	Yes	Yes
View Non-MFP Licenses Per User, Including Workflow Shared Status and Licenses In Use	No	Yes	Yes	Yes
Manage Total Licenses	No	Yes	Yes	Yes
Users				
Invite Users via Email	Yes	Yes	Yes	Yes
Assign User Group and Role to Invited User	Yes	Yes	Yes	Yes
Resend Iinvite	Yes	Yes	Yes	Yes
Cancel Invite	Yes	Yes	Yes	Yes
Create User Group	Yes	Yes	Yes	Yes
Move User Group	Yes	Yes	Yes	Yes
Assign User Role to Tenant Member	Yes	Yes	Yes	Yes
Assign Tenant Admin Role to Tenant Member	Yes	Yes	Yes	Yes
Assign Tenant Super Admin Role to Tenant Member	Yes	Yes	Yes	Yes
Assign Custom Role to Tenant Member	No	No	Yes	Yes
View the Number of Roles Assigned to Tenant Members	No	No	Yes	Yes
Assign Multiple Roles to Tenant Member	No	No	Yes	Yes
View/Edit Users’ Roles	Yes	Yes	Yes	Yes
View/Edit Shared Workflows	Yes	Yes	Yes	Yes
Block/Unblock User	Yes	Yes	Yes	Yes
Delete User	Yes	Yes	Yes	Yes
Search Users	Yes	Yes	Yes	Yes
Assign/Unassign Custom User Role	No	No	Yes	Yes
Assign/Unassign Custom Group Role	No	No	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Assign Default Group Member	No	No	Yes	Yes
Assign User License (for People-Based Workflows)	No	No	Yes	Yes
Forms				
Create New Form	Yes	Yes	Yes	Yes
Sample Forms	Yes	Yes	Yes	Yes
Import/Export forms	Yes	Yes	Yes	Yes
Publish/Unpublish Form	Yes	Yes	Yes	Yes
Clone Form	Yes	Yes	Yes	Yes
Edit Form	Yes	Yes	Yes	Yes
Delete Form	Yes	Yes	Yes	Yes
Search Forms	Yes	Yes	Yes	Yes
Create Form Group	Yes	Yes	Yes	Yes
Rename Form Group	Yes	Yes	Yes	Yes
Licensing	Yes	Yes	Yes	Yes
Flatten Form	No	No	Yes	Yes
Form Builder				
Drag and Drop Index Fields	Yes	Yes	Yes	Yes
Text Line Field	Yes	Yes	Yes	Yes
Text Area Field	Yes	Yes	Yes	Yes
Number Field	Yes	Yes	Yes	Yes
Checkmark Field	Yes	Yes	Yes	Yes
Dropdown Field	Yes	Yes	Yes	Yes
Date and Time Field	Yes	Yes	Yes	Yes
Hidden Field	Yes	Yes	Yes	Yes
Label Field	Yes	Yes	Yes	Yes
Page Break Field	Yes	Yes	Yes	Yes
Required Field	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Read Only Field	Yes	Yes	Yes	Yes
Helper Text	Yes	Yes	Yes	Yes
Multi-Select Field	Yes	Yes	Yes	Yes
Exclude from Metadata	Yes	Yes	Yes	Yes
Buttons List	Yes	Yes	Yes	Yes
Copy a Field on the Canvas	Yes	Yes	Yes	Yes
Delete a Field from the Canvas	Yes	Yes	Yes	Yes
Edit Forms from Both Web Forms and MFP Forms	No	No	Yes	Yes
File Upload support	No	No	No	Yes
Workflow Builder				
Workflow Canvas with Drag/Drop Capability	Yes	Yes	Yes	Yes
Node Palette panel	Yes	Yes	Yes	Yes
Search Node Palette panel	Yes	Yes	Yes	Yes
Create My Favorites Node Group	Yes	Yes	Yes	Yes
Collect, Process, and Distribute Node Groups	Yes	Yes	Yes	Yes
Float/Pin Node Palette	Yes	Yes	Yes	Yes
Remove Group from Favorites	Yes	Yes	Yes	Yes
Organize Favorites	Yes	Yes	Yes	Yes
Configure Node Palette View	Yes	Yes	Yes	Yes
Sort Node Palette	Yes	Yes	Yes	Yes
Drawing Tools Bar	Yes	Yes	Yes	Yes
Connectors Bar	Yes	Yes	Yes	Yes
Print Workflow	Yes	Yes	Yes	Yes
Export Workflow	Yes	Yes	Yes	Yes
Add Node to Favorites	Yes	Yes	Yes	Yes
Cut/Copy/Paste/Delete Welected Item on Canvas	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Undo/Redo Previous Action	Yes	Yes	Yes	Yes
Validate Workflow	Yes	Yes	Yes	Yes
Display/Hide Fullscreen	Yes	Yes	Yes	Yes
Access Online Help Site	Yes	Yes	Yes	Yes
Dropdown Menu Accessing a List of Feature Menus, Including File, Edit. View, Insert, Shape, Project, and Help	Yes	Yes	Yes	Yes
Page Setup Window	Yes	Yes	Yes	Yes
Lock/Unlock Object on Canvas	Yes	Yes	Yes	Yes
Select all Objects on Canvas	Yes	Yes	Yes	Yes
Select all Objects on Canvas of a Type	Yes	Yes	Yes	Yes
Delete Page(s)	Yes	Yes	Yes	Yes
Show/Hide Toolbars	Yes	Yes	Yes	Yes
Show/Hide Canvas Grid	Yes	Yes	Yes	Yes
Snap Object to Grid	Yes	Yes	Yes	Yes
Zoom In/Out	Yes	Yes	Yes	Yes
Restore Canvas View to Actual Size	Yes	Yes	Yes	Yes
Show/Hide Full Screen	Yes	Yes	Yes	Yes
Keyboard Shortcuts Window	Yes	Yes	Yes	Yes
Insert New Page	Yes	Yes	Yes	Yes
Insert Object onto Canvas	Yes	Yes	Yes	Yes
Group/UnGroup Shapes	Yes	Yes	Yes	Yes
Arrange Objects (Bring to Front/Back)	Yes	Yes	Yes	Yes
Select Similar Shapes	Yes	Yes	Yes	Yes
Properties Panel (Define Visual Attributes of a Selected Object)	Yes	Yes	Yes	Yes
Set Default Configurations for Properties Panels	Yes	Yes	Yes	Yes
Define Default Error Node	Yes	Yes	Yes	Yes
Define Grid Spacing	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Select a Workflow Button icon for Display at MFP	Yes	Yes	Yes	Yes
Select a Background Image for Workflow	Yes	Yes	Yes	Yes
Define a Color Scheme for Canvas Text, Lines, and Background	Yes	Yes	Yes	Yes
Experiment with Sample Workflows	Yes	Yes	Yes	Yes
Add People Nodes to workflows	No	No	Yes	Yes
Rename Node on Canvas	Yes	Yes	Yes	Yes
Change Node icon on Canvas	Yes	Yes	Yes	Yes
Set Node visual attributes on Canvas	Yes	Yes	Yes	Yes
Group/UnGroup Nodes	Yes	Yes	Yes	Yes
Set Text Attributes for Nodes on Canvas	Yes	Yes	Yes	Yes
Set Color Attributes for Nodes on Canvas	Yes	Yes	Yes	Yes
Edit Node Properties	Yes	Yes	Yes	Yes
Show/Hide Connector Symbols	Yes	Yes	Yes	Yes
Group/UnGroup Connectors	Yes	Yes	Yes	Yes
Order (arrange) Connectors	Yes	Yes	Yes	Yes
Define Color Scheme for Connectors	Yes	Yes	Yes	Yes
Define User-Selectable Connectors for People Nodes	No	No	Yes	Yes
Set Attributes for Text on Canvas	Yes	Yes	Yes	Yes
Group/UnGroup Text Boxes on Canvas	Yes	Yes	Yes	Yes
Order (Arrange) Text Boxes on Canvas	Yes	Yes	Yes	Yes
Define Color Scheme for Text in Text Boxes	Yes	Yes	Yes	Yes
Configure Shapes (Ellipse, Rectangle, Line) on Canvas	Yes	Yes	Yes	Yes
Select Multiple Objects on Canvas	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
View Status (Footer) bar, Including Page Number, Location of Selected Object on Canvas, Page Size, Printer Paper Size, and Zoom Level	Yes	Yes	Yes	Yes
Logs				
View Activity Logs for Selected workflows, devices, or Users	Yes	Yes	Yes	Yes
Restrict Log View to a Selected Date Range	Yes	Yes	Yes	Yes
Restrict Log View to Selected Log types	Yes	Yes	Yes	Yes
Sort Log View	Yes	Yes	Yes	Yes
Filter Log View to Display Selected Data Columns	Yes	Yes	Yes	Yes
Export Logs to CSV ot TXT	Yes	Yes	Yes	Yes
Search Logs	Yes	Yes	Yes	Yes
Process Node Logging	Yes	Yes	Yes	Yes
License Calculator				
View Current License Count and Expiration Date	Yes	Yes	Yes	Yes
Create “What If” Scenarios for a Proposed Update to a Tenant License	Yes	Yes	Yes	Yes
Specify Target License Counts and Expiration Dates	Yes	Yes	Yes	Yes
Specify Variables Manually, by a Single Increment, or Using a Slider	Yes	Yes	Yes	Yes
Displays the License and Quantity to Purchase in Order to Meet the Targeted License	Yes	Yes	Yes	Yes
Roles				
Use the Roles Feature to Control Members’ Access within the Tenant	Yes	Yes	Yes	Yes
Assign a System Role to Tenant Members	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
View a List of Tenant Roles and their Members	No	No	Yes	Yes
Create Custom Roles for your Tenant	No	No	Yes	Yes
Select the Permissions to Include in a Custom Role	No	No	Yes	Yes
Modify a Custom Role	No	No	Yes	Yes
Delete a Custom Role	No	No	Yes	Yes
Search the List of Roles	No	No	Yes	Yes
Sort the List of Roles	No	No	Yes	Yes
Assign Multiple Roles to Tenant Members (via User Management Page)	No	No	Yes	Yes
Assign a Default Role to a User Group	No	No	Yes	Yes
View the User Groups for Which the Role is the Default Role	No	No	Yes	Yes
Inbox				
View a List of Jobs and Notifications that Require your Attention	No	No	Yes	Yes
View the Notification Type, Date/Time Received, and Other Information About the Notification	No	No	Yes	Yes
Sort the Inbox	No	No	Yes	Yes
Delete a Notification	No	No	Yes	Yes
Form Viewer on Job Ticket for All Form Types	No	No	Yes	Yes
Jobs				
View a List of Jobs of Which You are Owner	No	No	Yes	Yes
View the Job Summary, History, Notes, and Attachments	No	No	Yes	Yes
Track a Job	No	No	Yes	Yes
Delete a Job from Your List	No	No	Yes	Yes
Manually Process a Job	No	No	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Job Queues				
Manage the Job Queues of Which You Are a Member	No	No	No	Yes
Select a Job Queue and View the Notifications within	No	No	No	Yes
Create New Job Queues	No	No	No	Yes
Add Tenant Members to a Job Queue	No	No	No	Yes
Delete a Job Queue	No	No	No	Yes
View the Members of a Job Queue	No	No	No	Yes
Stale Job Notification	No	No	No	Yes
Transitions - No Action Taken Notification	No	No	No	Yes
Tracker				
View a List of Tracked Jobs	No	No	Yes	Yes
Edit Tracked Jobs Assigned to You	No	No	Yes	Yes
Settings				
View Tenant License Count and Expiration Date	Yes	Yes	Yes	Yes
Modify Tenant License	Yes	Yes	Yes	Yes
Upgrade Tenant License	Yes	Yes	Yes	Yes
View Tenant Settings	Yes	Yes	Yes	Yes
Modify Tenant Name	Yes	Yes	Yes	Yes
Modify Tenant Time Zone	Yes	Yes	Yes	Yes
View/copy Dispatcher Paragon Integration Information	Yes	Yes	Yes	Yes
Upgrade IWS app License	Yes	Yes	Yes	Yes
Tenant Configuration				
MarketPlace Auth	Yes	Yes	Yes	Yes
Cloud Database Auth	Yes	Yes	Yes	Yes
Entra ID Auth	Yes	Yes	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
US Data Center	Yes	Yes	Yes	Yes
Canadian Data Center	Yes	Yes	Yes	Yes
European Data Center	Yes	Yes	Yes	Yes
APAC Data Center	Yes	Yes	Yes	Yes
Infrastructure				
YSoft Connectivity	Yes	Yes	Yes	Yes
Collection Nodes				
MFP Capture In	Yes	Yes	Yes	Yes
Dropbox In	No	Yes	Yes	Yes
Gmail In	No	Yes	Yes	Yes
MS Exchange In	No	Yes	Yes	Yes
Upland Fax In	No	Yes	Yes	Yes
Dispatcher Phoenix In	Yes	Yes	Yes	Yes
External Forms In w/ Standard Forms	No	No	No	Yes
Internal Forms In w/ Standard Forms	No	No	Yes	Yes
Internal Forms In w/ Advanced Forms	No	No	No	Yes
External Forms In w/ Advanced Forms	No	No	No	Yes
Process Nodes				
Edit & Approve (User)	No	No	Yes	Yes
People User	No	No	Yes	Yes
People Group	No	No	No	Yes
People Queue	No	No	No	Yes
Advanced OCR	No	Yes	Yes	Yes
Annotate	No	Yes	Yes	Yes
Convert to PDF	No	Yes	Yes	Yes
Metadata Scripting	No	Yes	Yes	Yes
Metadata to File	Yes	Yes	Yes	Yes
Flatten Form	No	No	Yes	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Assign Owner	No	No	Yes	Yes
Rename	Yes	Yes	Yes	Yes
Form Selector	Yes	Yes	Yes	Yes
ODBC	No	Yes	Yes	Yes
Distribution Nodes				
Google Drive Connector	Yes	Yes	Yes	Yes
Upland Fax Connector	No	Yes	Yes	Yes
Dispatcher Phoenix Connector	Yes	Yes	Yes	Yes
SharePoint Online Connector	Yes	Yes	Yes	Yes
Email Out	Yes	Yes	Yes	Yes
Box Connector	Yes	Yes	Yes	Yes
Dropbox Connector	Yes	Yes	Yes	Yes
OneDrive Connector	Yes	Yes	Yes	Yes
OneDrive for Business Connector	Yes	Yes	Yes	Yes
Paragon Cloud Fax Connector	Yes	Yes	Yes	Yes
End Node	No	No	Yes	Yes
Advanced Forms				
Added Canvas Sizes	No	No	No	Yes
Drag and Drop of Existing Fields	No	No	No	Yes
Resize Form Fields	No	No	No	Yes
Multi-Select Fields	No	No	No	Yes
Layout Properties	No	No	No	Yes
Border Stroke Properties	No	No	No	Yes
Page Break Field	No	No	No	Yes
Dropdown Field	No	No	No	Yes
Checkboxes Field	No	No	No	Yes
Signature Field	No	No	No	Yes
Text Tool	No	No	No	Yes

Feature	ScanTrip Cloud	Starter	Business	Enterprise
Line Tool	No	No	No	Yes
Form Tools Rotation	No	No	No	Yes
Grouping Properties	No	No	No	Yes
Color Properties	No	No	No	Yes
Lock / Unlock Property	No	No	No	Yes
Order Properties	No	No	No	Yes
Section Group Field	No	No	No	Yes
Star Tool	No	No	No	Yes
Diamond Tool	No	No	No	Yes
Asterisk Tool	No	No	No	Yes
Plus sign Tool	No	No	No	Yes
Minus sign Tool	No	No	No	Yes
Custom CSS	No	No	No	Yes

Device Licensing

Device licenses are used to allow Dispatcher ScanTrip Cloud to collect documents and start workflows. Your Dispatcher ScanTrip Cloud license will come with a certain number of device licenses, which can be used to license MFPs or non-MFP devices, such as **External Forms**, third-party connectors like **Dropbox In** and more. For more information about adding devices to your tenant, see the **Device Management** page.

Using Device Licenses

You can add as many MFPs to your Dispatcher ScanTrip Cloud tenant as you want. When you register a license to the device, that is when the device license will become used.

To register a device, do the following:

1. Navigate to the **Devices** page.
2. In the row of the device you would like to register, select the **Medal** icon in the Actions column on the right-hand side. The Register License to Device window appears.
3. To register the device, select **Yes**. Otherwise, select **No**.

Medal Icon

The medal icon displays in the Actions column. Its color indicates the license registration status of the device:

- Green - The device is registered and is available for use with workflows.
- Purple - The device is not registered, but a license is available on which to register the device.
- Gray - No licenses are available on which to register the device. For more information about modifying your license and how it will affect your available licenses, see the **Settings** page.

Using a Non-MFP Device License

After a user has non-MFP licenses assigned to them, those licenses are then used whenever a user saves a **Collection Node** that Dispatcher Stratus recognizes as consuming a license.

For non-MFP inputs such as **Dropbox In** or **Microsoft Exchange In**, Dispatcher Stratus will use a license whenever it recognizes a unique combination of the following:

- Logged-in user
- Node Type
- Account
- Folder Type

For **External Form** and **Internal Form** nodes, Dispatcher Stratus will use a license whenever it recognizes a unique form URL (created during node configuration).

Example

If a user has a device license configured for a **Dropbox In** folder called “Applications” and creates a second workflow configured for the same folder, that will only use one device license.

If that same user has two Dropbox In nodes in a workflow, each configured with a different folder, that workflow will use two licenses.

Note: The Blue icon indicates that at least one of the assigned licenses has been used. The empty icon indicates that the user has not used any of their assigned licenses.

Reclaiming a Used Non-MFP License

If you have used a non-MFP device license and would like to use it for a different input, you can reclaim the used license in two ways:

- Delete the workflow(s) using the license.

- Delete the input node(s) using the license and save the workflow. Note that the license will not be available until the workflow is saved.

User Licensing

User licenses can be included in Dispatcher Stratus Business and Enterprise license tiers. These are purchased separately from device licenses. For more information about adding user licenses to your tenant, see the **User Management** page.

Using User Licenses

You can add as many users to your Dispatcher ScanTrip Cloud tenant as you want. These users can access and use workflows with no restrictions. When you assign a license to a user, that is when the user license will become used. User licenses are necessary for users who will be interacting with **People Nodes**.

To assign a license to a user, do the following:

1. Navigate to the **Users** page.
2. In the row of the user you would like to assign a license to, select the **Medal** icon in the Actions column on the right-hand side. The Register License to Device window appears.
3. To register the device, select **Yes**. Otherwise, select **No**

Medal Icon

The medal icon displays in the Actions column. For more information, hover over the Medal icon. The color of the Medal icon indicates the license registration status of the user:

- Green - The user is registered and is consuming a user license.
- Purple - The user is not registered and is not consuming a user license.
- Gray - The user’s registration status cannot be changed at this time. Likely causes are:
    - There are no available user licenses. For more information about modifying your license and how it will affect your available licenses, see the **Settings** page.
    - The user is a Default Group Member. To remove the license from this user, they must be removed as the Default Group Member for all groups.

MFP App

The Dispatcher ScanTrip Cloud App for Konica Minolta MFPs provides easy access to Dispatcher ScanTrip Cloud at the device. With Konica Minolta’s powerful cloud-based workflow automation application, you can access your workflows at the MFP without a virtual private network (VPN). This easy-to-use app includes single sign-on (SSO) with any supported third-party application, as well as multi-server support.

Note: To begin using Dispatcher ScanTrip Cloud or the Dispatcher ScanTrip Cloud App, you must have a Konica Minolta MarketPlace account.

Installing the App

Before you can use the app for workflows, you must **install it on one or more registered MFPs**

Installing the App Via MarketPlace

To install the app on an MFP via MarketPlace, do the following:

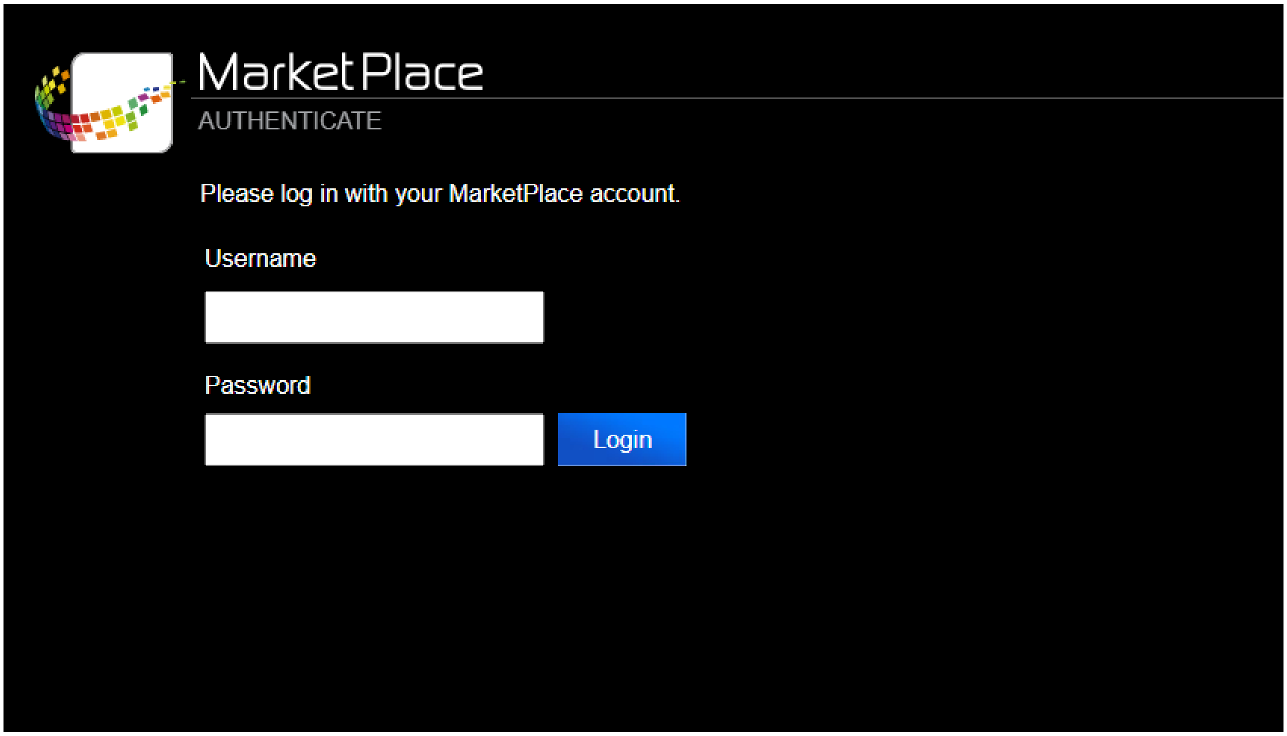
1. Navigate to **Konica Minolta MarketPlace** (https://konicaminoltamarketplace.com)
2. Select the person icon in the upper-right corner and enter your username and password. Then, select **Login**.
3. On the right, select **Apps & Licenses**, then **Apps** to view the applications you have purchased.
4. Scroll down to **Dispatcher ScanTrip Cloud** and select it.
5. On the right side of the screen, the “Installed” area displays all MFPs on which the app is already installed. The “Available” area displays the registered MFPs of which you are an administrator that are available for installation. Select the box next to each MFP you want to install the app on. Then, select **Install**.

Installing the App from the MFP

To install the app at the MFP, do the following:

1. At the MFP, tap the **MarketPlace** icon.
2. At the MFP, tap the **APP MANAGER** button in the bottom-left corner.

3. Enter your MarketPlace username and password into the available fields.
4. Tap the **Login** button.
5. Enter the MFP’s administrative password into the available field, if this is the first time you are logging in, or if the administrative password has changed. An exception to this is on some older devices when multiple attempts to log in have failed and the MFP’s admin area becomes locked. In this case, you will need to enter the MFP admin password again.



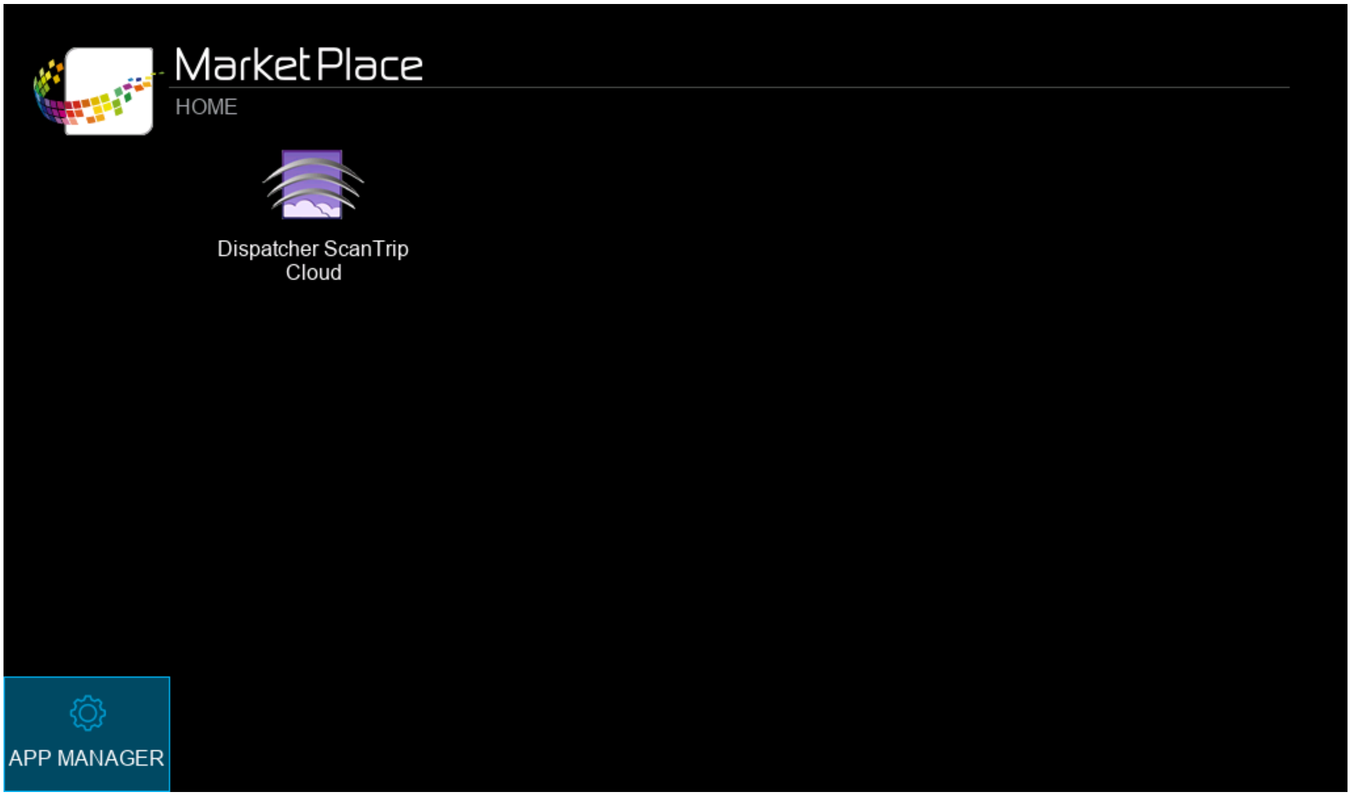
6. Tap the **Login** button.
7. Tap the **Purchased** tab to see your purchased apps.

   Note: The list of purchased apps will show those compatible with the machine you are using.
8. Tap the **Install** button next to the Dispatcher ScanTrip Cloud App.
9. To confirm installation, tap the **Installed** tab.

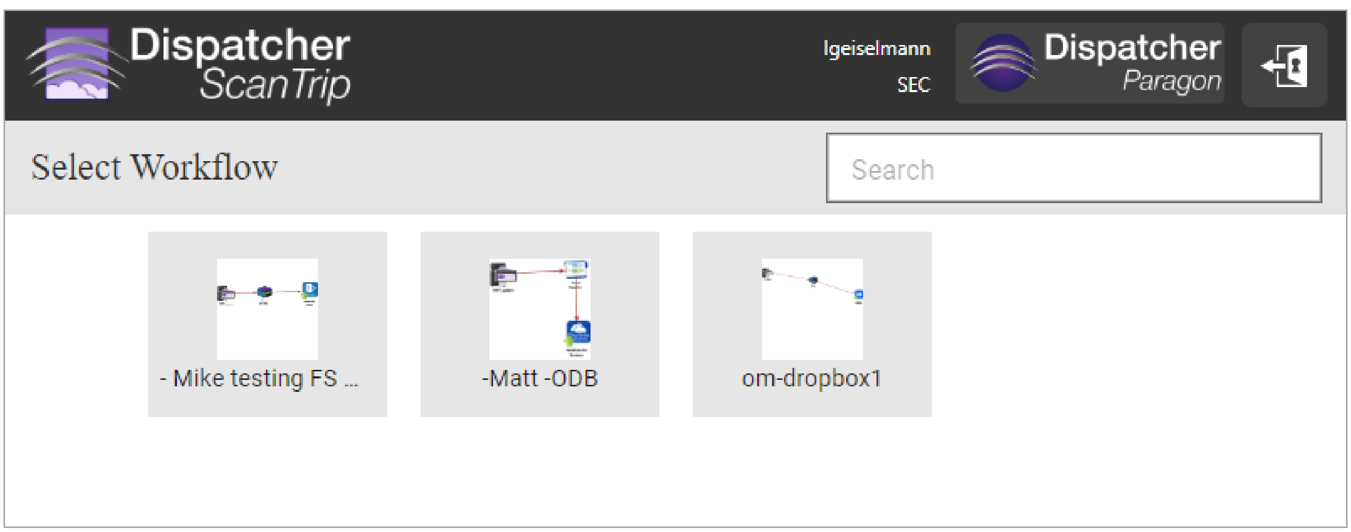
See also: Installing the app from Konica Minolta MarketPlace or at the MFP

Using the MFP App

Once the app has been configured, you are able to start using it at the MFP by tapping on the icon:



You will now be able to access your Dispatcher ScanTrip Cloud workflows. Only workflows that have an enabled **MFP Capture** collection node and are verified, running, and shared with the device are displayed. For more information, see the **Workflow Management** and **Using the Workflow Designer** pages.



To use a workflow, tap the workflow icon. This will allow you to access the workflow and perform any required steps that have been configured in the workflow, such as logging in to a third-party CMS for distribution, adjusting scan settings, entering additional information about the document, etc.

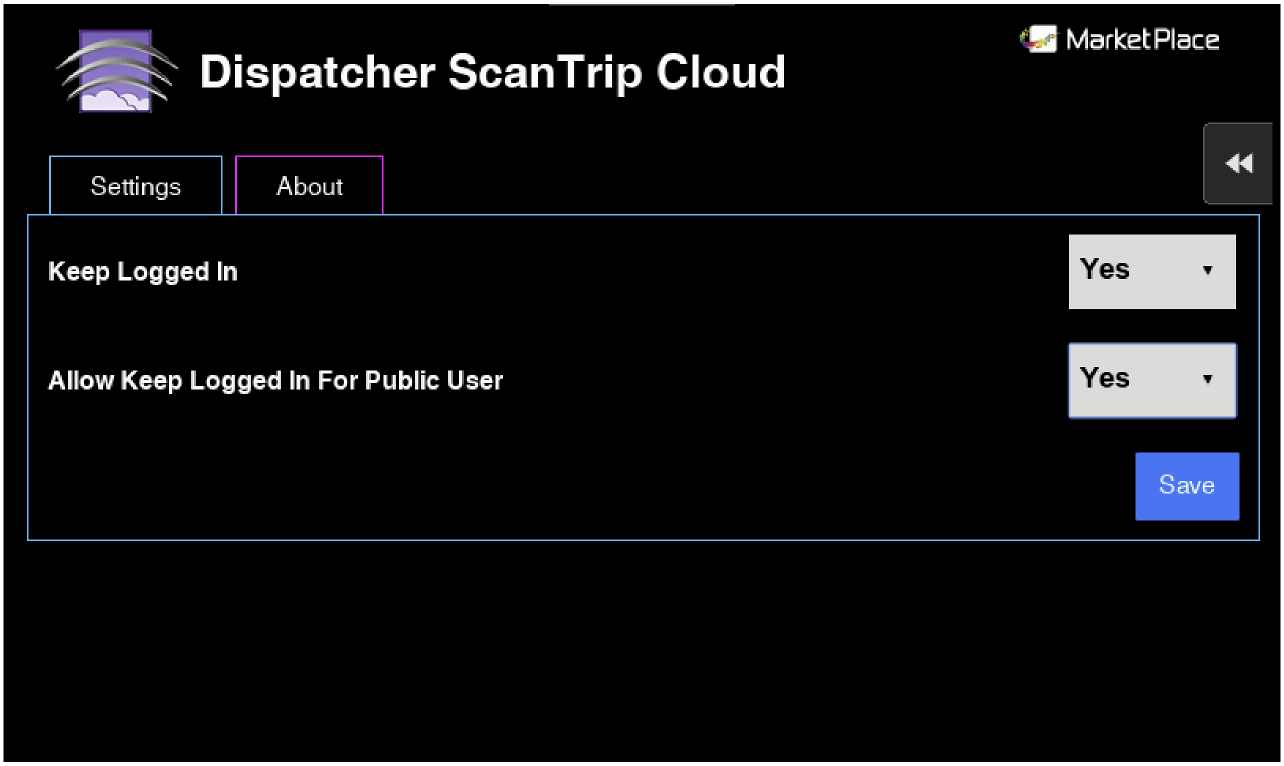
Settings

You can configure the application at the MFP. Do the following:

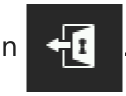
1. At the MFP, tap the **App Manager** button, provide your MarketPlace credentials, and then tap the **Login** button. Note that if you are not an administrator for the device, you must provide the MFP Administrator password as well.
2. In the App Manager, under the Installed tab, locate the Dispatcher ScanTrip Cloud listing and then tap on the Settings button on the right side of the screen. The Settings screen for the app appears.

The following settings are available:

- **Keep Logged In** - To allow for single sign-on (SSO), select **Yes**. With this feature enabled, only a single login is required to access the app at the MFP. That is, users who authenticate at the MFP will only be required to enter their login credentials the first time they access the app. Note that users can override their individual SSO setting by accessing the application's Settings screen. However, if you select **No** here, that setting becomes disabled and users cannot enable their individual SSO setting in the app itself.
- **Allow Keep Logged in For Public User** - To allow the Public user to stay logged in, select **Yes**. Otherwise, select **No**.

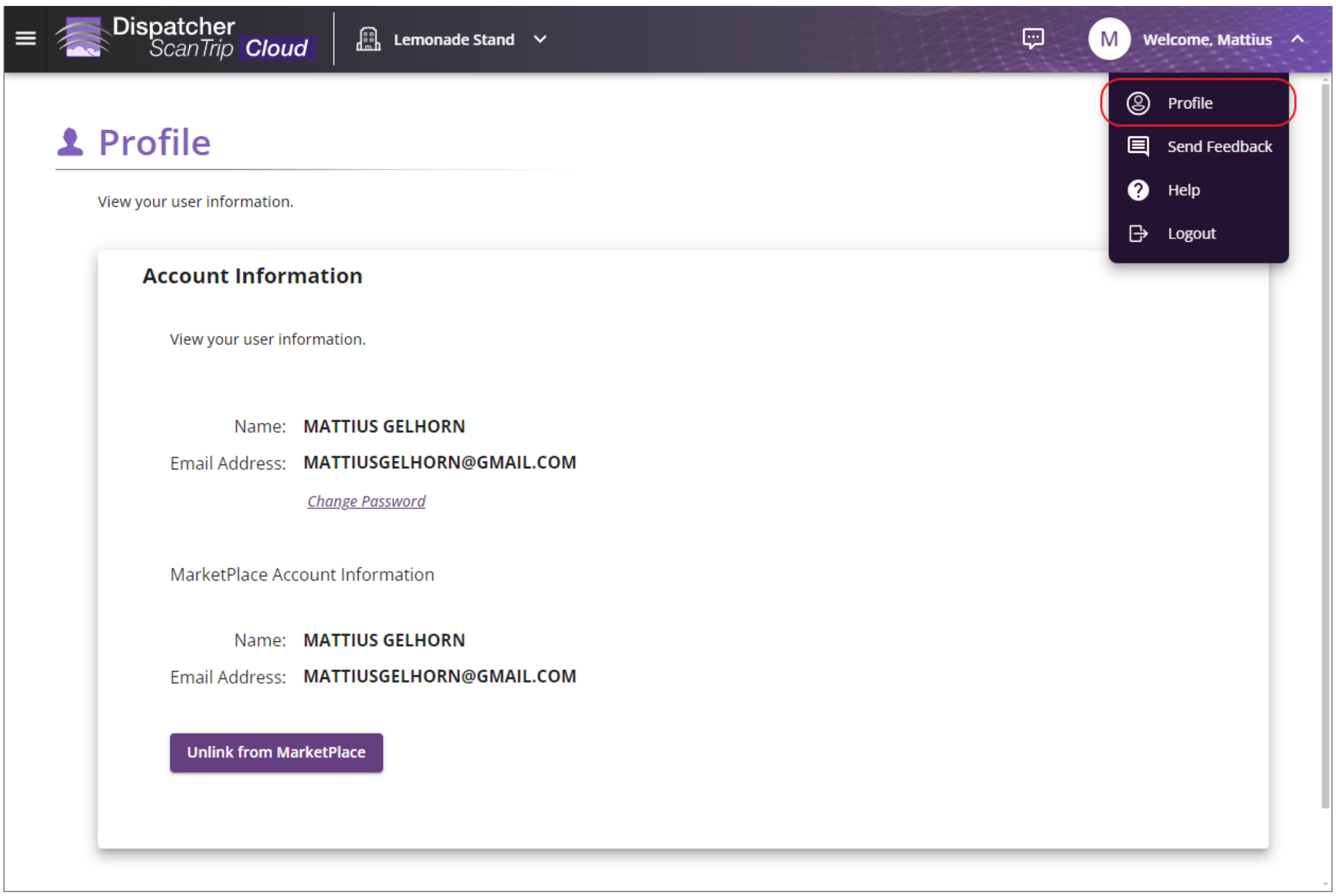


Notes:

- Once the app is installed on the device, a shortcut for the app is automatically created.
- Tapping the “Logout” button in the upper-right corner will only log the user out of the app, not the MFP user session. To log out of the MFP user session, use the MFP’s Logout button . Depending on the MFP model type and its capabilities, this may be a physical button and/or a soft button on the MFP touchscreen.

Profile

The Profile page displays tenant account information for the logged-on user. All tenant members have access to the Profile page. It is a selection option on the User drop-down menu on the Title bar. See the following illustration:



Account Information

This section displays the following information about your tenant membership. No other personal data is stored.

- Name - The name associated with your MarketPlace account.
- Email Address - The email address associated with your MarketPlace account.

Important! Dispatcher ScanTrip Cloud does not store any additional information about users.

Editing Account Information

You cannot edit your account information here. It is generated from outside the portal, and you must update the information at the source in order to change the display here. Your tenant admin specified your tenant's source of account information during the tenant configuration process. The source is one of the following:

- MarketPlace - To change your profile information, access the **Konica Minolta MarketPlace Profile** page.
- Local database - To change your profile information, change the related values within your authentication database.

Change Password

If the tenant has been configured to use the Cognito login method, users will have the option to **Change Password**. To update your existing password, do the following:

1. Select the **Change Password** link.
2. Enter a new password in the **New Password** field. Passwords must contain:

- At least 8 characters
- At least one upper case letter
- At least one lower case letter
- At least one number
- At least one special character
- No spaces

In addition, the password will receive a strength score. It is recommended that password strengths be green for security.

3. Enter the same password in the **Confirm Password** field.
4. Select the **Save** button.

Link to MarketPlace

If the tenant has been configured to use a login method other than MarketPlace, you will see a **Link to MarketPlace** button. This allows you to connect your tenant profile to your Konica Minolta MarketPlace account. Do the following:

1. Select the **Link to MarketPlace** button.

2. Enter your login credentials for MarketPlace. Then, select **Log In**.
3. You will be redirected back to your tenant’s Profile page, where you will see your MarketPlace account information.

To unlink your account from MarketPlace, select the **Unlink from MarketPlace** button.

Requirements

Dispatcher ScanTrip Cloud is a web-based solution that is designed for mass access and usability.

Browser Support

Any Konica Minolta device that supports MarketPlace also supports Dispatcher Stratus and Dispatcher ScanTrip Cloud. The tenant portal can be accessed by any of the following HTML5 supported web browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

  Note: The portal will support the current version of the browser and one version prior.

Device Support

Dispatcher ScanTrip Cloud is optimized for the following devices:

- Tablets
- Laptops
- Desktop Computers

Workflow Builder Requirements

While the Dispatcher ScanTrip Cloud portal is fully web-based, the Workflow Builder tool is a separate download that requires a Windows operating system. The following operating systems are supported:

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

MFP Requirements

In order to take full advantage of Dispatcher ScanTrip Cloud features, MFPs must have:

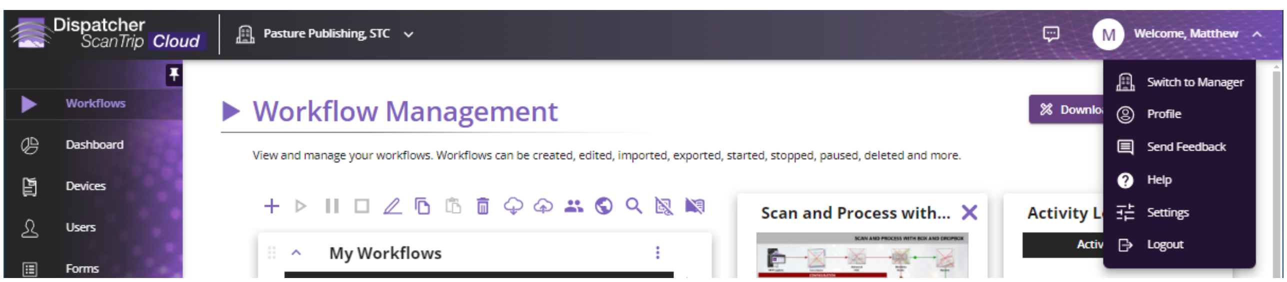
- Browser capabilities and/or IWS capabilities. The **IWS application** must be installed on each Konica Minolta MFP you expect to use to access workflows.
- A valid Dispatcher ScanTrip Cloud login.
- A license from the tenant purchased and assigned to that device.
- A proper configuration for Authentication.

  Note: Portal Users will need to have separate user accounts in MarketPlace. The MFP will manage authentication with the local authentication application. Enhancements to authentication options, such as Azure AD, will be available per MarketPlace Universal ID roadmap.

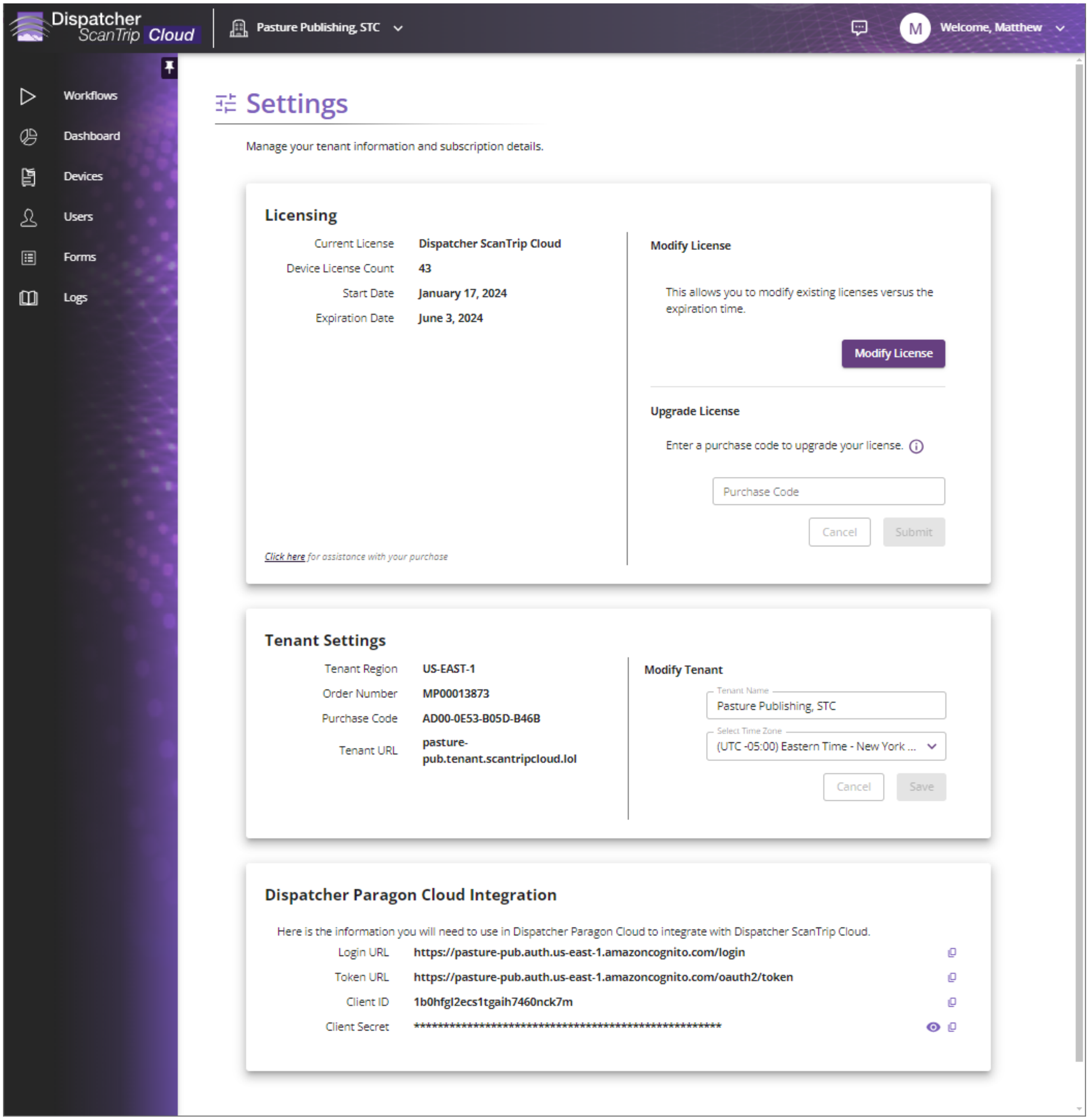
Settings

Use the Settings page to view and edit your tenant settings, including license and tenant information. You can access the Settings page for any tenant for which you have access privileges, for example, the **Tenant Admin** role. Access the tenant whose settings you want to view/edit, then do the following:

1. Select your user name on the right end of the Title bar. The User menu appears:



2. Select **Settings**. The Settings page appears:

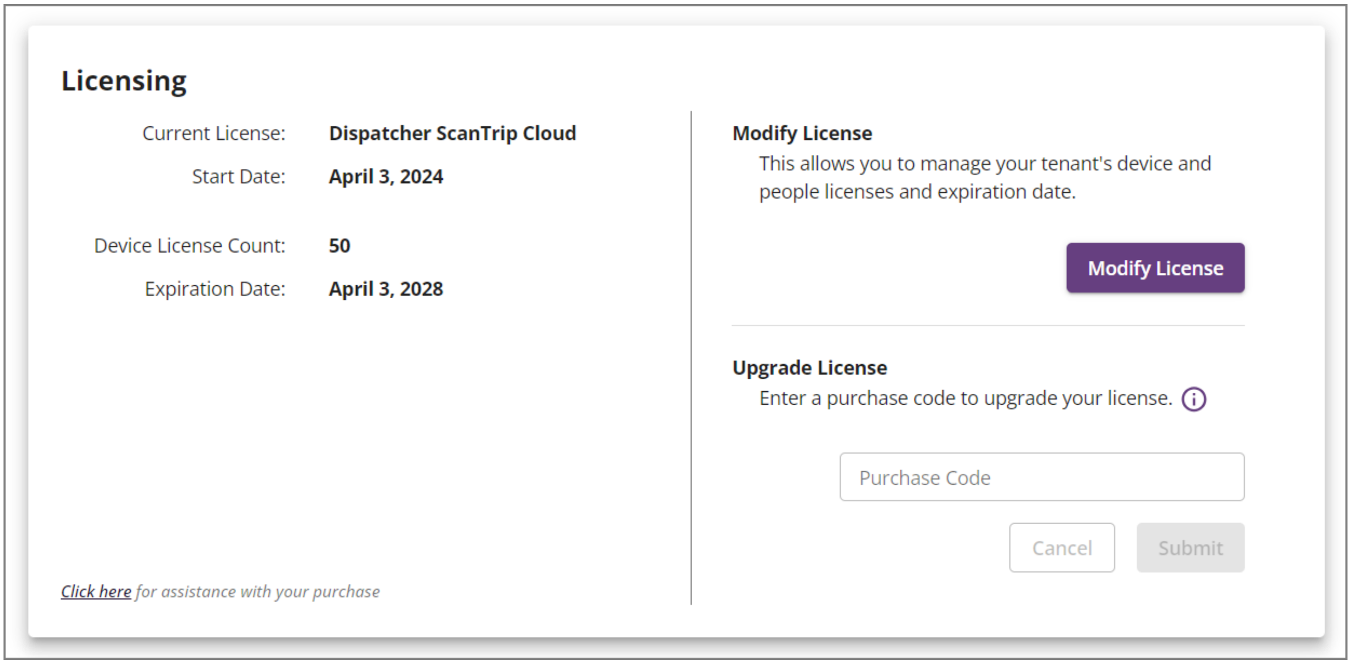


3. On the Settings page, navigate to the section containing the settings you want to edit. Sections include:
   - **Licensing**
   - **Tenant Settings**
   - **External Form SAML Settings**
   - **Dispatcher Paragon Cloud Integration**
4. Edit the settings you want to change. When complete, select the **Save** button.

Note: Certain settings may require additional confirmation, for example when modifying a license.

Licensing

The Licensing area displays information about the current status of your tenant license. Initially, this area displays the status of your original license purchase. Later, this area will update to reflect any changes to the license, for example, if you **modify** or **upgrade** your license.



Information includes:

- Current License - The name of the license purchased
- **Device License Count** - The current device capacity for the tenant
- Start Date - The start date of the license
- **Expiration Date** - The end date of the license’s term of service

Note: Your term of service begins immediately upon activation of a license. However, you cannot use a device until you **add it to the tenant and activate a device license for it**.

Modifying a License

The Modify License process enables you to **increase** the license count against the service time remaining for your tenant license. In this way, you can **redistribute** the remaining service time for your licenses proportionally across the updated license count, resulting in an increased number of licenses available for use in the tenant, but a decreased amount of remaining service time. For example, if you have 10 device licenses, each with a service term of 1 year, and you increase your device count to 20, you also decrease the term of service to 6 months. Note that this process does not involve purchasing additional licenses or service time. Use the **Upgrade License** process for that.

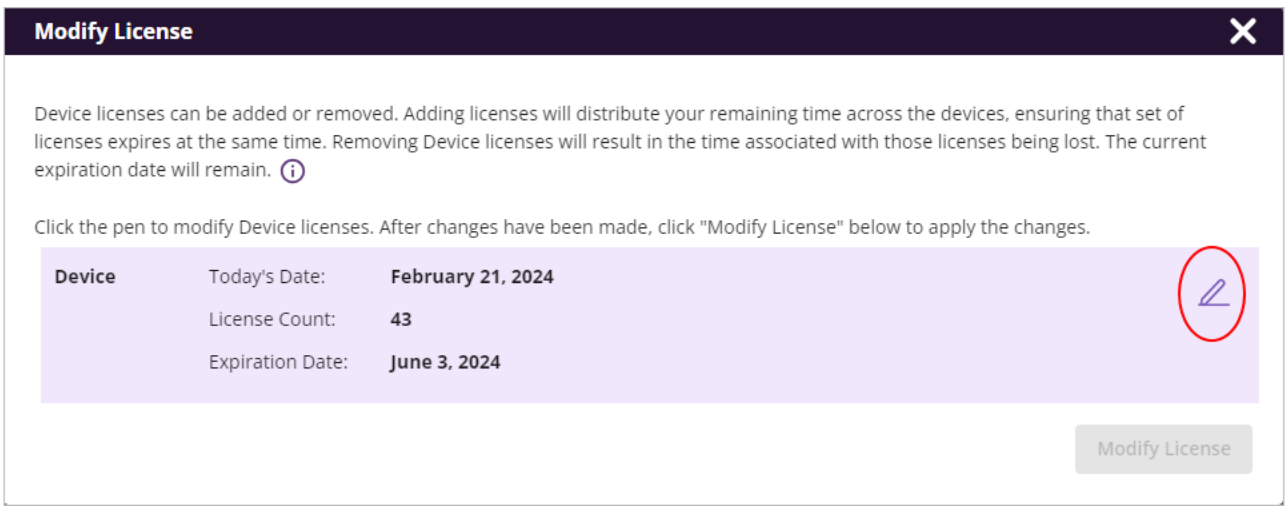
Notes:

- You can also **decrease the device count** in your tenant.
- You cannot use this process to manually adjust the remaining service time in your license. You can only **manually adjust your device count**, which may cause the **expiration date** to adjust automatically.

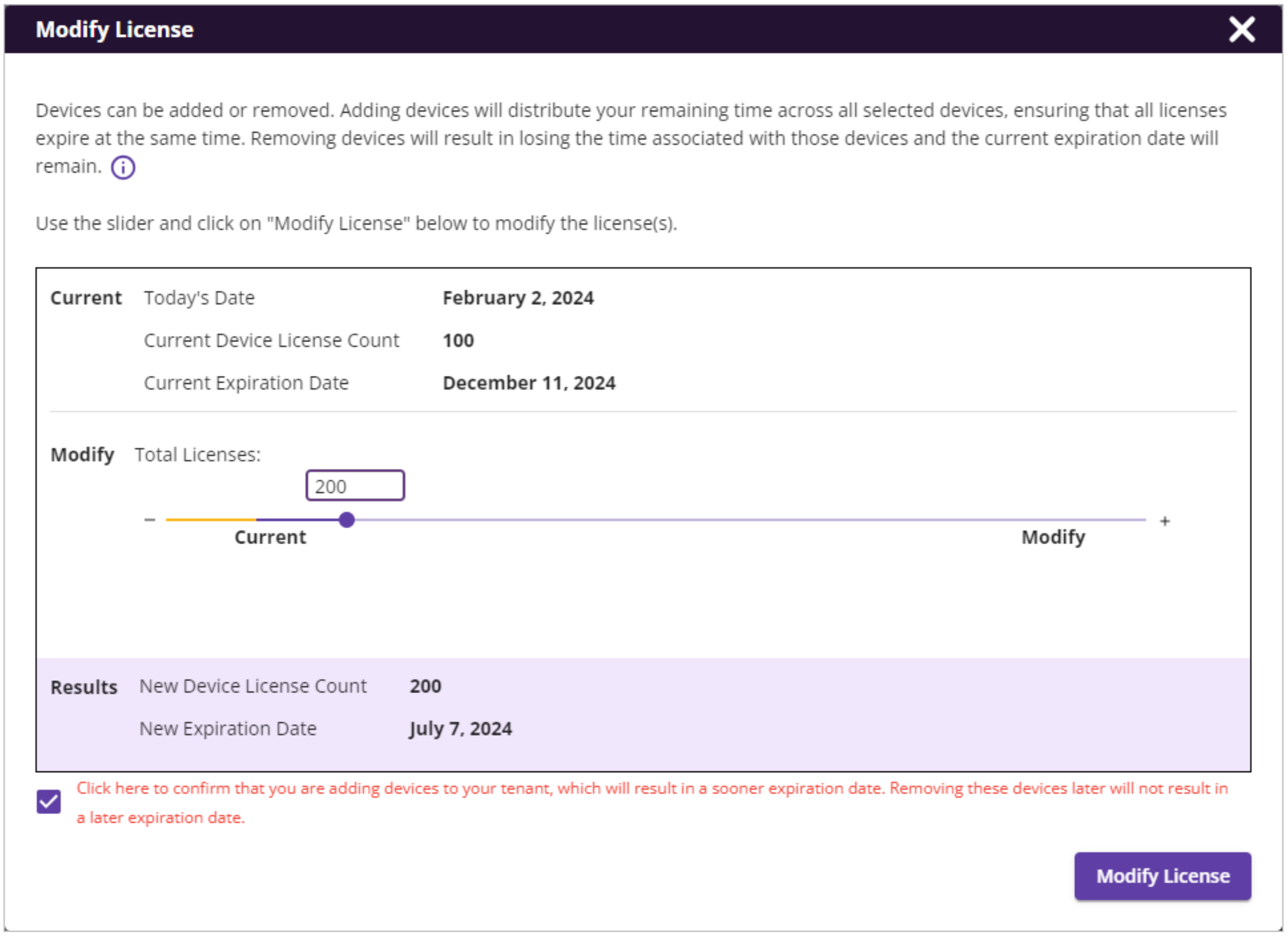
Increasing Your License Count

To increase the current license count in your tenant, do the following:

1. Select the **Modify License** button. The Modify License window appears:



2. Select the Pen icon for the license type you want to edit, for example, the Device license type. The Slider window appears:



3. Move the slider to the right. This process distributes your remaining service time proportionally across all licenses in the tenant (your updated license count). The **Results** area updates to show the new license count, and the **expiration date** adjusts to ensure that all licenses expire on the same date.

   Note: The slider prevents you from adding any number of licenses that will cause the adjusted expiration date to fall within the current billing period.

4. To continue, you must acknowledge that you understand that increasing licenses results in your expiration date adjusting to occur on an earlier date. Place a check in the confirmation box to confirm. The **Modify License** button activates. Click this button to save your changes, or click on the **X** button to cancel your changes.

   In the above illustration, the slider has been moved to the right, and the **Results** area adjusted accordingly.

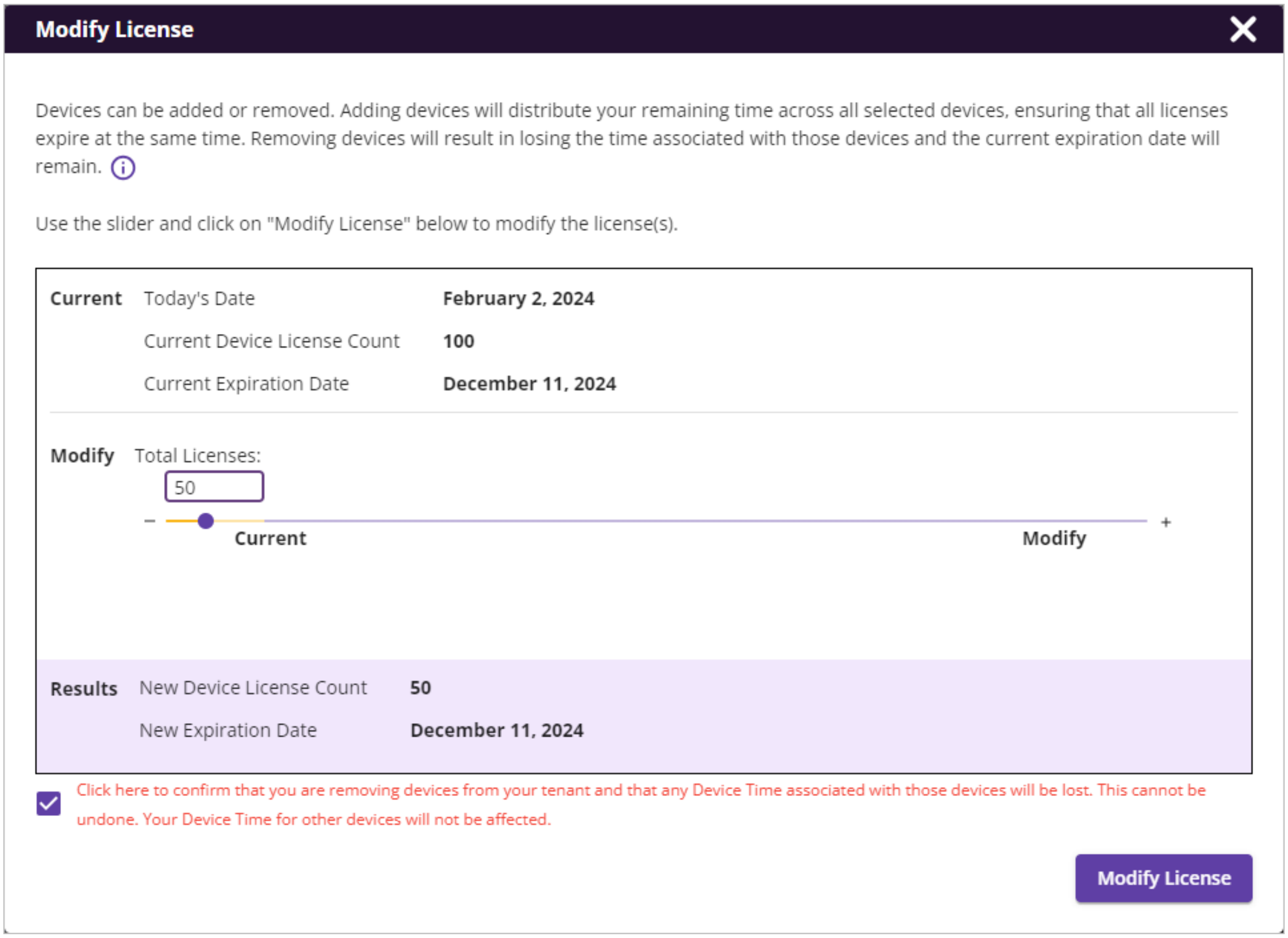
Decreasing Your License Count

The process to decrease the current license count in your tenant is similar to the Increase License Count process, except that you move the slider to the left. This process reduces your license count but does not affect your **expiration date**.

Note: The slider prevents you from removing any number of licenses that will cause your adjusted license count to be less than the number of **assigned licenses** in the tenant.

Caution! Reducing the license count in the tenant results in the loss of the remaining license time allocated to the removed licenses. The lost time cannot be recovered.

In the following illustration, the slider has been moved to the left, and the **Results** area adjusted accordingly.



Upgrading a License

ScanTrip Cloud provides the following upgrade options:

- Expand the license count and/or remaining service time in your tenant.
- Upgrade to **Dispatcher Stratus**.

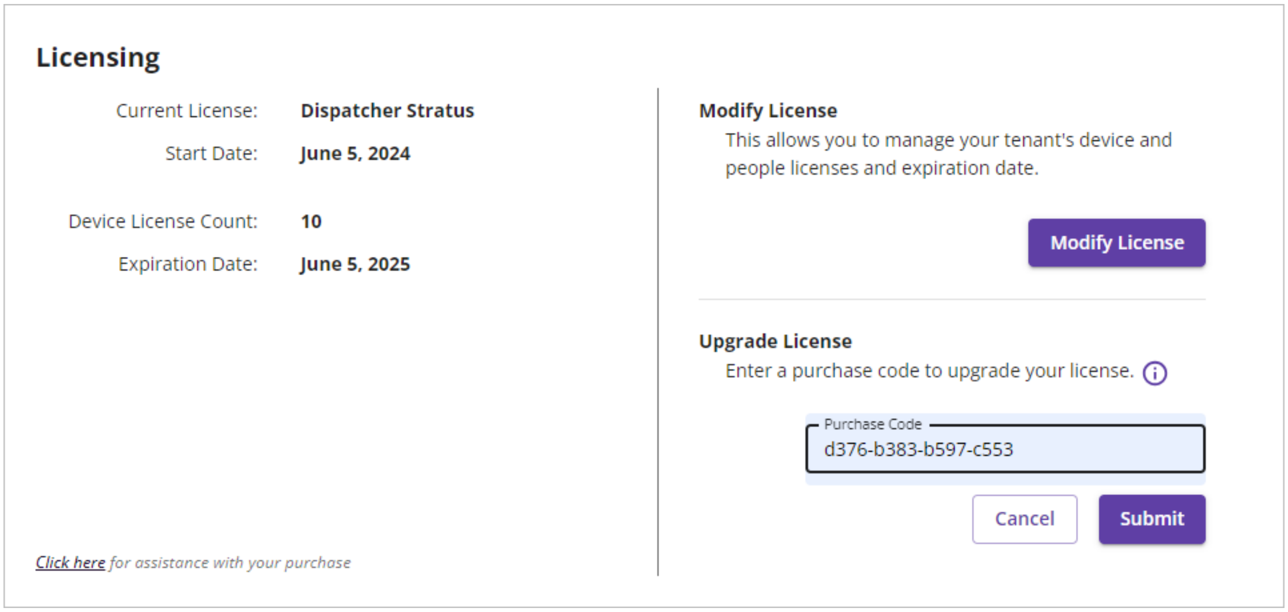
Note: Upgrades to licenses take effect immediately and will be reflected at the next billing term.

Expanding a ScanTrip Cloud License

This type of license upgrade enables you to increase the license count and/or remaining service time in your ScanTrip Cloud tenant.

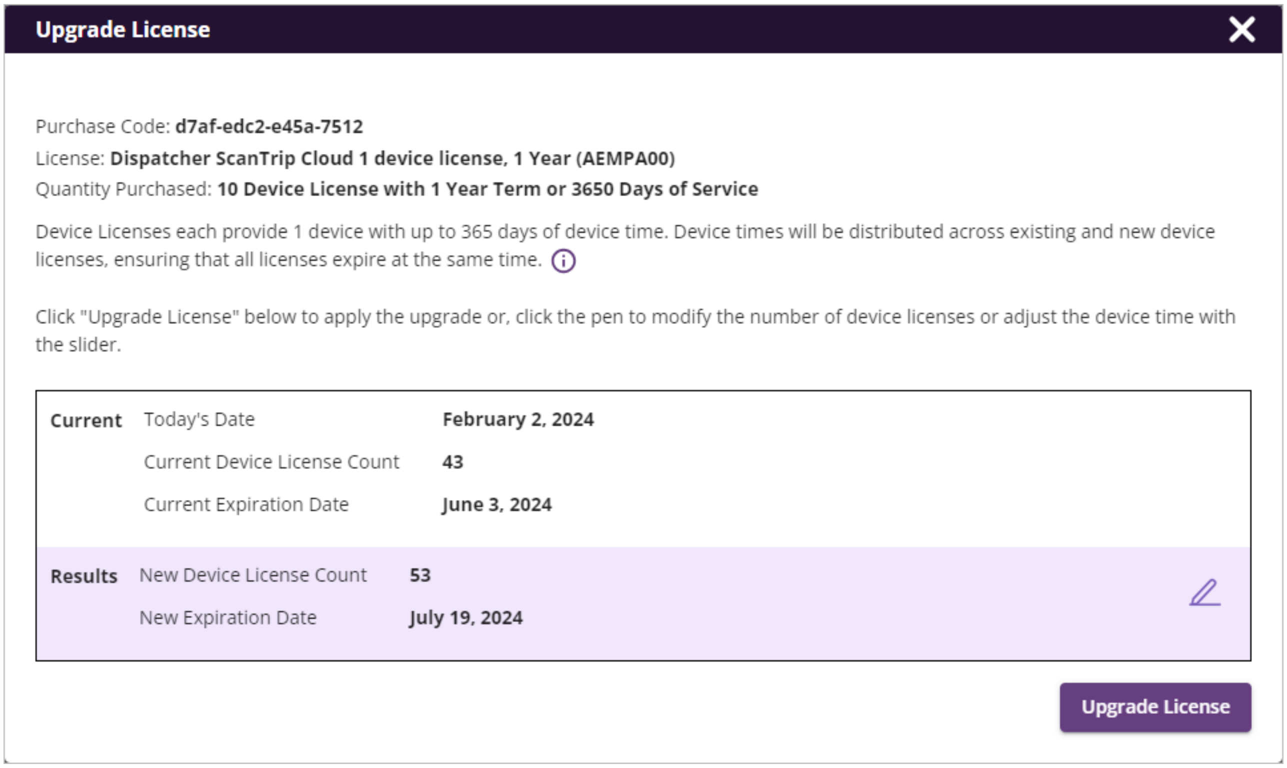
1. Purchase an upgrade license from your Konica Minolta sales representative, specifying the quantity of device licenses and/or service time you want to add to the license. Your sales rep will provide you with a purchase code, for example, via email.

2. In the Purchase Code field in the Upgrade License area, enter the purchase code.



3. Click on the **Submit** button. The Upgrade License window appears.

4. In the Upgrade License window, you can compare your current license with your new license.

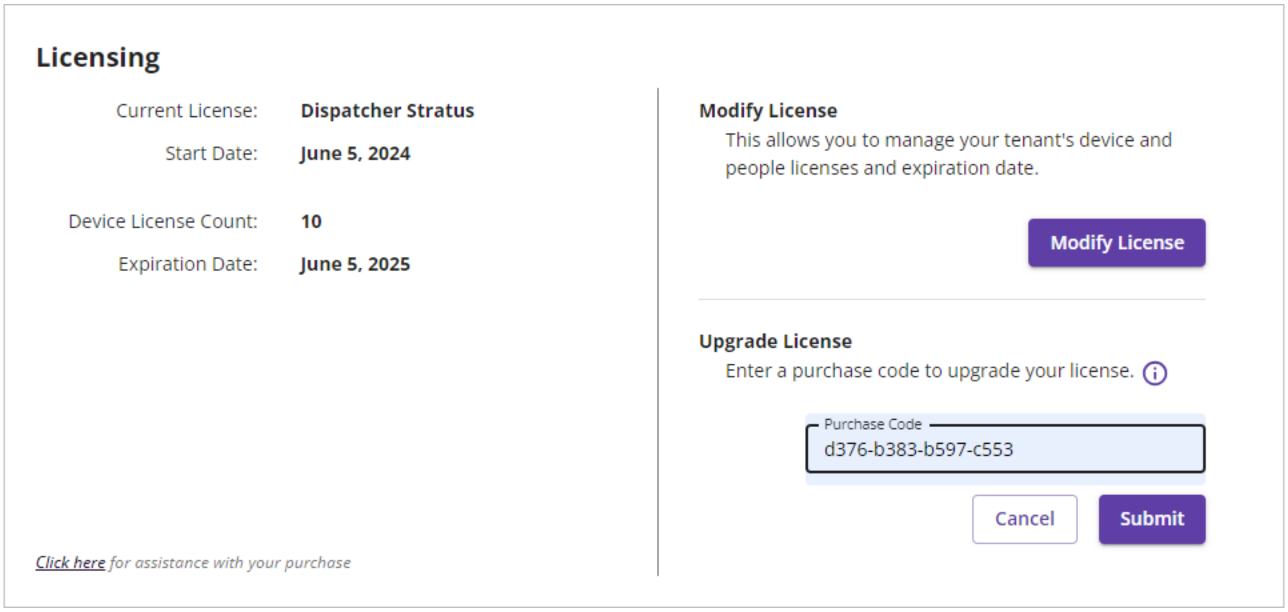


5. To update the distribution ratio for the new licenses (in terms of either devices or service time), select the Pen icon in the bottom-right corner. The Upgrade License window appears, containing a slider similar to the one described in the **Modifying a License** section.
6. To activate your upgraded license, select **Upgrade License**.

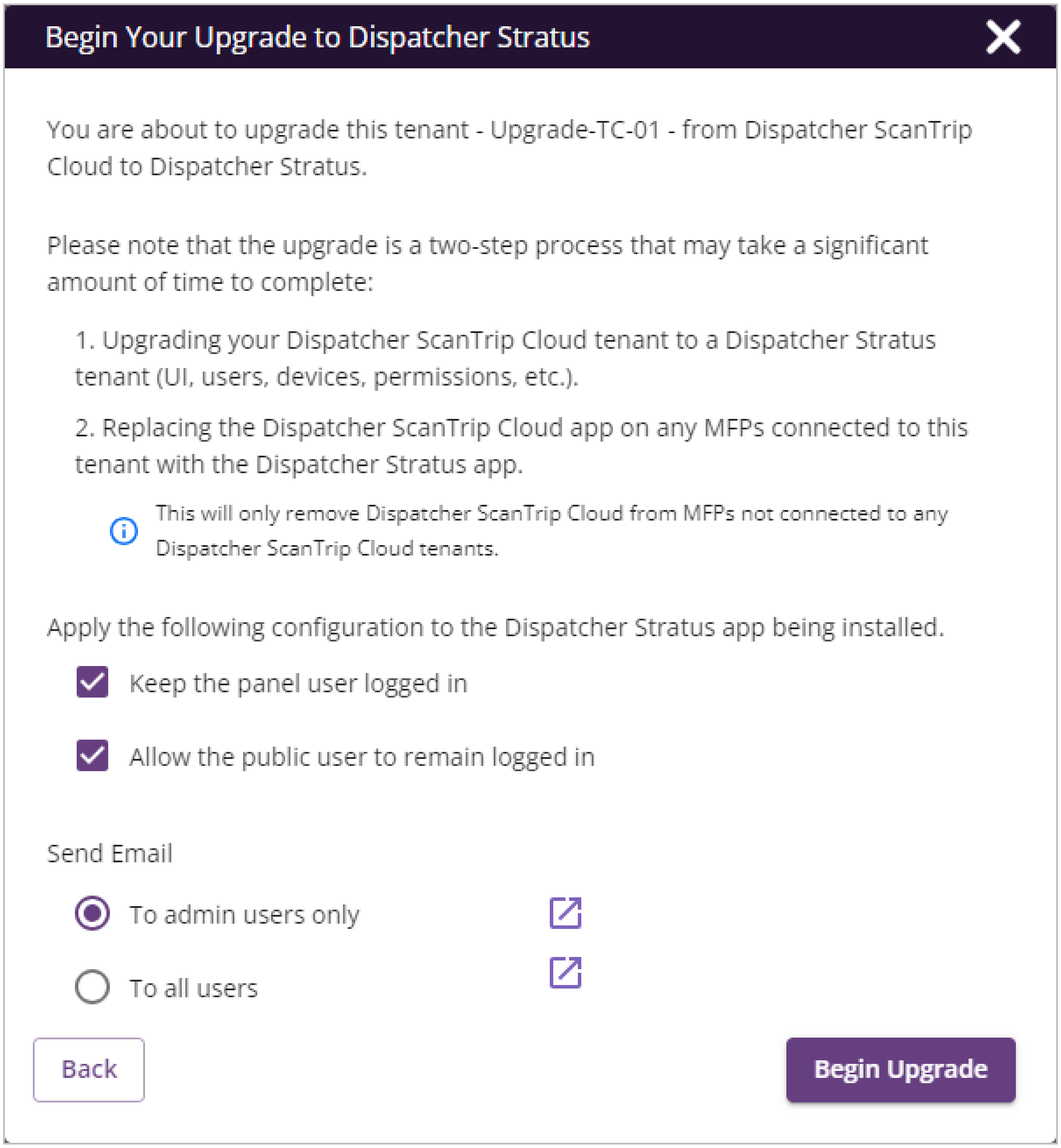
Upgrading to Dispatcher Stratus

To upgrade your ScanTrip Cloud license to the more powerful Dispatcher Stratus, do the following:

1. Purchase an upgrade license from your Konica Minolta sales representative. It must be an “upgrade to Dispatcher Stratus” license, and it should match your current license in terms of device licenses and/or service time. Your sales rep will provide you with a purchase code, for example, via email.
2. In the Purchase Code field in the Upgrade License area, enter the purchase code.



3. Click on the **Submit** button. The Begin Your Upgrade to Dispatcher Stratus window appears.
4. Specify the following:



- Keep the panel user logged in - To keep the user logged in to ScanTrip devices they are currently logged in to, select this box.
- Allow the public user to remain logged in - To keep the “public” user logged in to ScanTrip devices they are currently logged in to, select this box.
- Send Email: To admin users only - Send the notification email announcing the upgrade to Dispatcher Stratus to tenant admins only.
- Send Email: To all users - Send the notification email announcing the upgrade to Dispatcher Stratus to all tenant members.

5. To activate your upgraded license, select **Upgrade License**. MarketPlace sends a notification email to tenant members based on your selection in Step 4. Your ScanTrip Cloud session closes, and the Login screen appears, where you can log in to your new Dispatcher Stratus tenant.

Note: All devices connected to the tenant will be updated to replace the ScanTrip Cloud app with the Dispatcher Stratus app, excluding devices connected to one or more other ScanTrip Cloud tenants. For these devices, the ScanTrip Cloud app will remain installed.

Important! When upgrading from ScanTrip Cloud to Stratus, your device license and service quantities will remain the same. That is, you cannot increase or decrease those quantities as part of the upgrade.

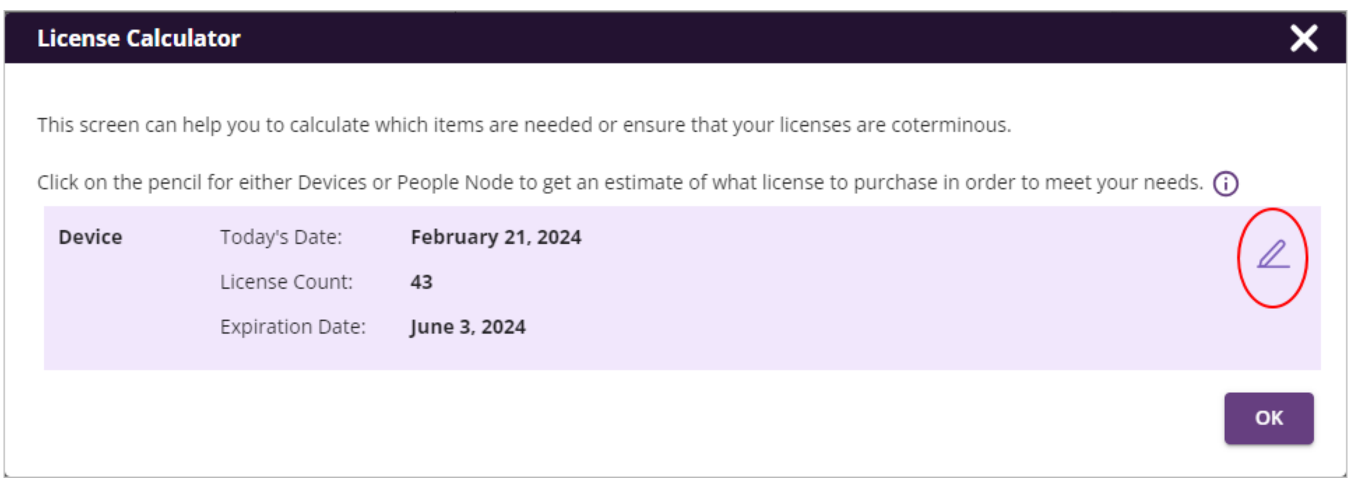
- If either quantity in the upgrade license is less than the quantity in your current license, an error message appears and you cannot continue with the upgrade.
- If either quantity in the upgrade license is greater than the quantity in your current license, a warning message appears. If you continue with the upgrade, all extra service time and/or device licenses will be lost. You can also cancel the upgrade at this time and contact your sales representative to obtain the correct license quantity needed to align with your existing ScanTrip Cloud licenses.

Once the upgrade is complete, you can adjust the quantities of your upgraded license, if desired.

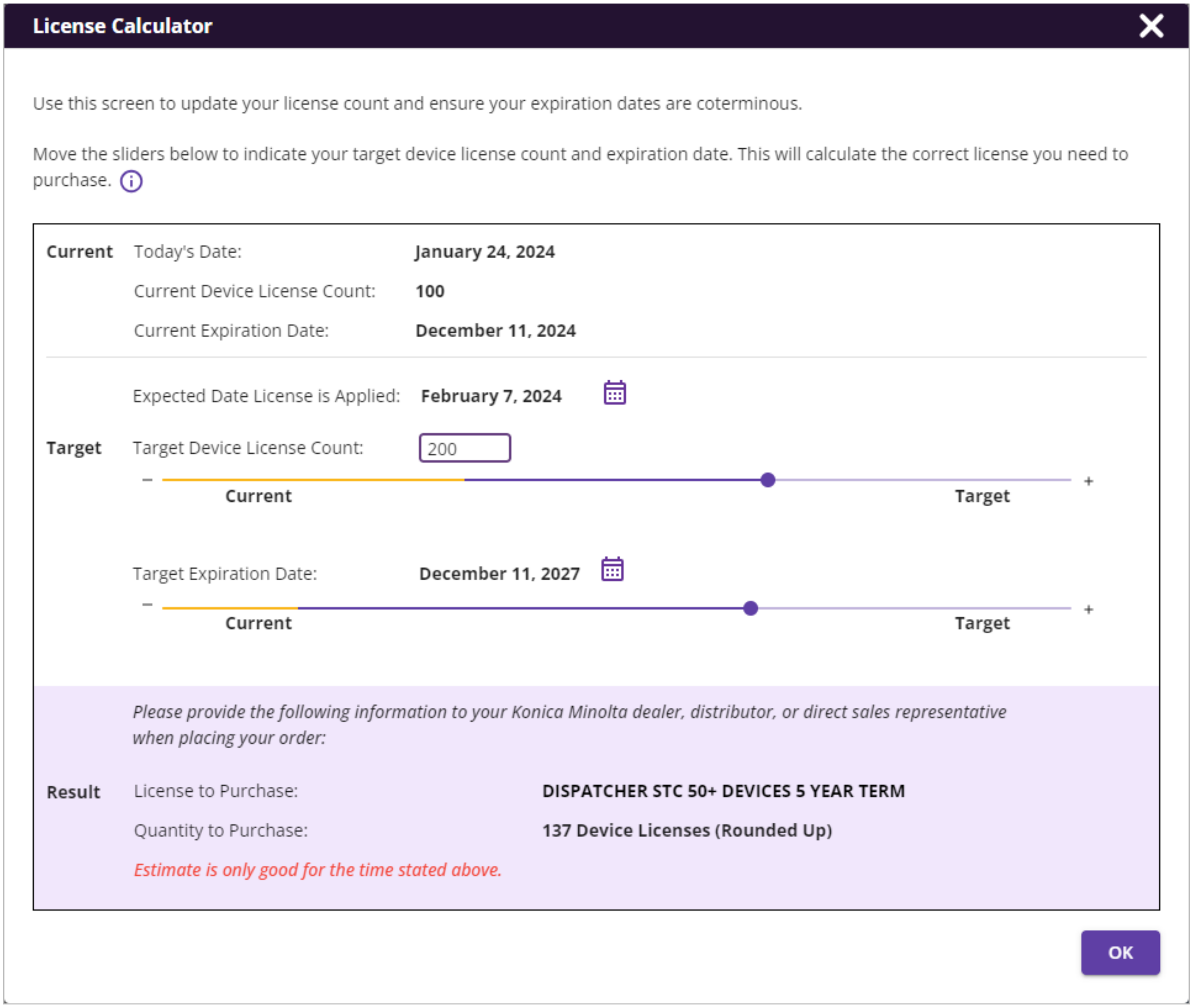
License Calculator

The License Calculator is a tool you can use to forecast **license distributions** for a proposed purchase of a Dispatcher ScanTrip Cloud license. This tool includes sliders you use to increase or decrease the license count and term of service for your proposed purchase, enabling you to create “what if” scenarios for license distribution in the tenant.

To access the License Calculator, select **Click here for assistance with your purchase** at the bottom-left of the Licensing panel. The License Calculator selection window appears:



Select the Pen icon for the license type you want to edit, for example, the Device license type. The Slider window appears:



The License Calculator includes your current license count and the original start date of your license in its calculations. For example, if you want to increase your device count by 50 for a term of 3 years, the License Calculator can show you the proper license and quantity to purchase.

In the above illustration:

- The current device count is 100
- The target device count is 200
- The target expiration date is December 11, 2027, three years after the current expiration date.

Using the License Calculator Slider

The License Calculator Slider window contains the following sections:

- **Current** - Displays your current license information, including the following:
    - Today’s date
    - Your current license count
    - The current expiration date for the license type, for example, the Device license type.
- **Target** - Contains the sliders you use to create various purchase scenarios, modifying the license count and expiration date for your license. This section contains the following controls:
    - Expected Date License is Applied - Specify the date on which to begin the proposed term of service. This date defaults to two weeks after the current date, but you can specify any date that falls after the current date.
    - Target License Count - Move the slider to indicate the number of licenses you want your tenant to contain.
    - Target Expiration Date - Enter the date on which you want your new license term to end. You can extend your license up to 6 years.

      Note: Dispatcher ScanTrip Cloud assigns the same expiration date to all licenses of a type (for example, Device licenses). Thus, when Dispatcher ScanTrip Cloud calculates the actual expiration date at time of purchase, that date may differ from the date you specify here. That is, rounding may be required to achieve a coterminous state for your licenses. If so, the expiration date will always be rounded up.
- **Result** - Once you edit either the target license count or expiration date, this section updates to display the following:
    - License to Purchase - The Dispatcher ScanTrip Cloud license you need to purchase to achieve your target purchase scenario.
    - Quantity to Purchase - The number of licenses you need to purchase to achieve your target purchase scenario.

When you are satisfied with your projected purchase, make note of the license information in the Result area. When placing your order, provide this information to your Konica Minolta dealer, distributor, or direct sales representative. The information is only an estimate and is valid only for the dates you specify. For example, if next week you targeted the same device count and expiration date, your result could be different.

Note: Once you click **OK**, you return to the Settings page. Your calculation is not preserved.

About Tenant Licensing

Each purchased license consists of one or more of the following, the basic purchasing unit:

- A license count (1 Device license)
- A term of service (1 year)

License purchases can include an extended term of service (in years) and multiple Device licenses. Upon the initial license purchase for a tenant, the following is established, as indicated in the **Licensing** area:

- The start date of the term of service
- The **expiration date** of the term of service
- The **license count**

Examples of Licensing

Assume your initial license purchase consists of one device license. You can either:

- Apply the license to a single device and receive the Dispatcher ScanTrip Cloud service for one year.
- Apply the license to multiple devices, distributing the 12 months of service time equally among the devices.

Six months later, if you purchase another device license, you can either:

- Apply the upgrade to your existing device(s), thereby distributing the 12 months of service time equally among the device(s).
- Apply the upgrade to one or more additional devices, distributing the 12 months of service time equally among your expanded device count.

License Counts

A tenant's Device license count displays in the Licensing area of the Settings page.

Device License Count

A tenant's Device license count displays in the Licensing area of the Settings page. The device count is also known as the "device capacity" for the tenant (that is, the maximum number of devices that can currently be added to the tenant).

The Device license count represents the number of device licenses purchased, plus or minus any device licenses that were added or removed via the **modify** or **upgrade** license processes. The Device license count consists of:

- Assigned devices - Devices that have been added to the tenant and to which a device license has been assigned.
- Unassigned devices - Devices to which no device license has been assigned, and which are available for assignment within the tenant.

Expiration Date

A tenant’s expiration date(s) display in the Licensing area of the Settings page. A date displays for each license type in your tenant, for example, Device licenses. That is, even if you **modify** or **upgrade** a license type, the expiration date will adjust so that the remaining service time before expiration will be the same for all licenses of that type in the tenant.

Distributed Licensing

The terms of service for licenses can be distributed proportionally across the license count in a tenant. That is, a single device license can be distributed in the following ways:

- 365 days of service for 1 device
- 365 days of service to be distributed proportionally across the **device count**.

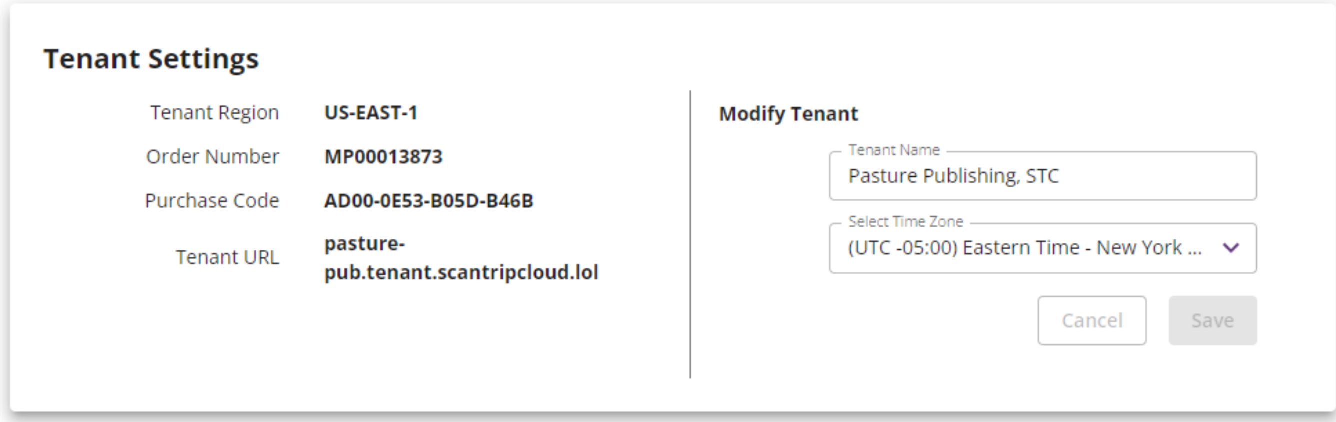
For example:

Device Licenses	Device Count	Months of Service
10	5	24
10	10	12
10	20	6

Tenant Settings

The Tenant Settings area displays information about the tenant, including:

- Tenant Region - The region in which the server storing your tenant data is located. Your tenant admin specified this region as part of the tenant setup, and it cannot be modified.
- Order Number - The order number of the most recent purchase for this tenant.
- Purchase Code - The purchase code of the most recent purchase for this tenant.
- Tenant URL - The URL for your tenant.



Modify Tenant

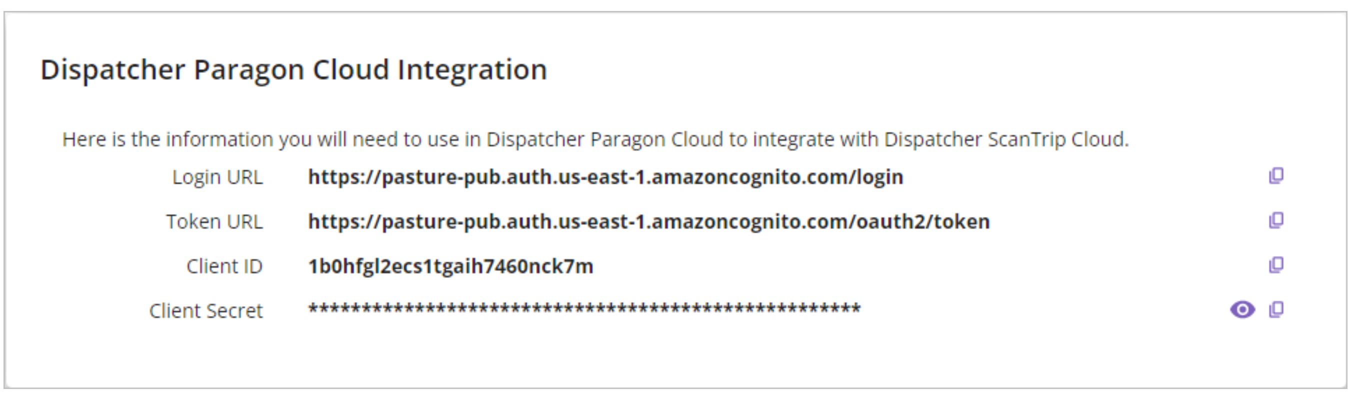
You can modify the following information about the tenant:

- Tenant Name - Modify the display name for your tenant. This name appears on the Title bar of your tenant.
- Select Time Zone - Select a time zone for your tenant. Click on the drop-down menu to display a list of time zones. The time zone you select affects the time calculation for many functions in the tenant, including the Logs page and the Workflows page.
- Default Tenant Language - The default language the tenant will use when displaying log messages. Individual users can adjust the other text by updating their **Profile**.

  Note: When creating your tenant, the Select Time Zone field will display the time zone associated with your tenant region. However, the time zone for your tenant is not actually set until you select **Save**.

Dispatcher Paragon Cloud Integration

This section displays the information needed to integrate Dispatcher ScanTrip Cloud with Dispatcher Paragon Cloud.



Dispatcher ScanTrip Cloud provides the following information:

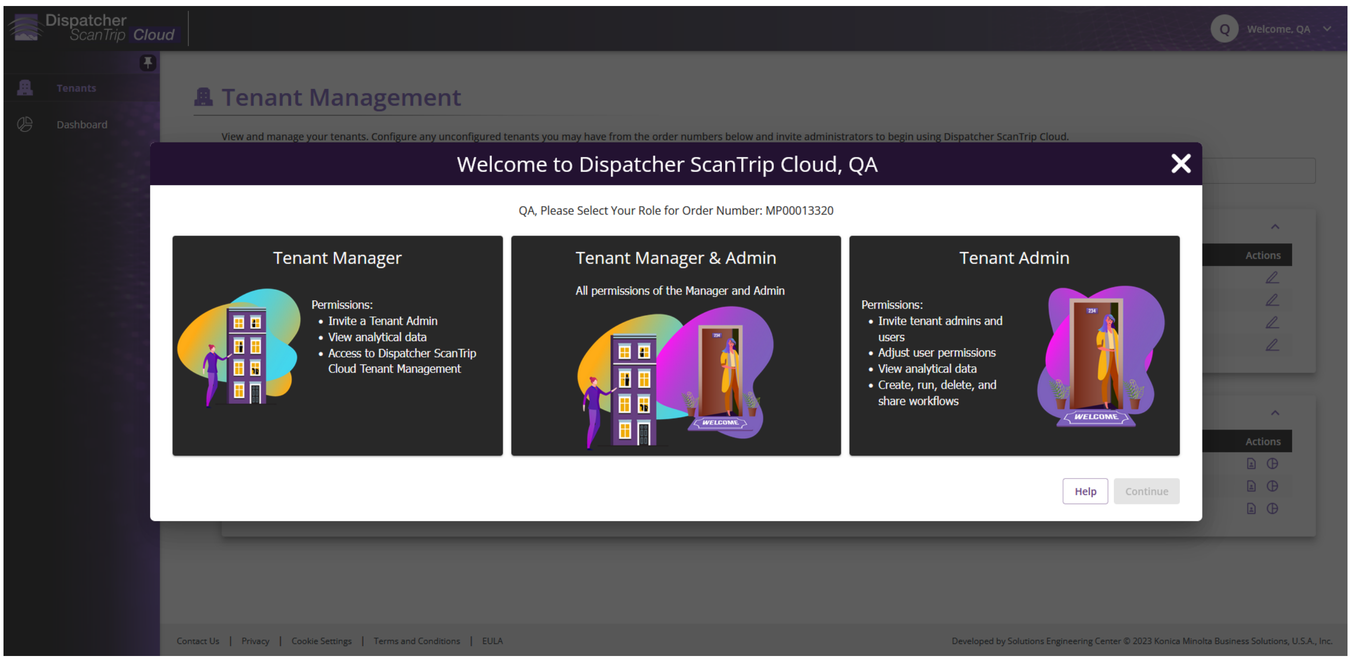
- Login URL
- Token URL
- Client ID
- Client Secret - The client secret is hidden by default. To unhide the secret, select the Eye icon.

Each field has a **Copy** button so you can easily copy the value and paste it into Paragon Cloud.

For details, refer to the **Dispatcher Paragon Cloud documentation**.

Tenancies and Onboarding

Dispatcher ScanTrip Cloud is a cloud-based, multi-tenancy platform that enables you to remotely manage **tenants**, **workflows**, and more. Each tenancy can have its own **manager**, **administrators**, and **tenant members (users)**, each of which has various **permissions** within the platform. While each individual tenancy is separate from others, tenant managers can have permissions over **multiple tenancies**, and any user can belong to multiple tenants, with different permissions for each, as needed. This page explains how to get started managing your tenant.



Overview of Tenants

A tenant, or tenancy, is a grouping of at least one purchased license. Tenants can be set up by a third party, such as a dealer, or by the purchasing organization. Within each tenant, the organization can add users, register devices, and manage workflows, each according to the organization's needs. For example, an organization may require only a single tenant with a single device registered. Another organization may have multiple tenancies, one for each of their branches, each with multiple devices registered.

Roles and Permissions

Each tenant member must have a **role**, each role having different **permissions** within the tenant:

- **Tenant Admin**
- **Tenant Manager**
- **Tenant Manager & Admin**
- **User**

Use Cases for Single/Multi-Tenancy

Dispatcher ScanTrip Cloud is a true multi-tenancy platform in which multiple tenants can be viewed and managed from a single solution. You can manage your own tenancies, or you can arrange for a third-party to oversee your tenancies. The platform provides a single interface for both options. Benefits of multi-tenancy include:

- High scalability
- Faster deployment and streamlined onboarding
- Centralized analytics and reporting to optimize usage
- Increased transparency in operations
- Enhanced flexibility

Onboarding into Your Tenant

The following sections describe the onboarding process for members of your new tenant.

Note: Once the onboarding process is complete, tenant invitees who accept their invitation can log directly into the tenant using their MarketPlace credentials.

As a Tenant Admin

Tenant admins have permission to configure many aspects of the tenant. To set up a tenant as a Tenant Admin, do the following:

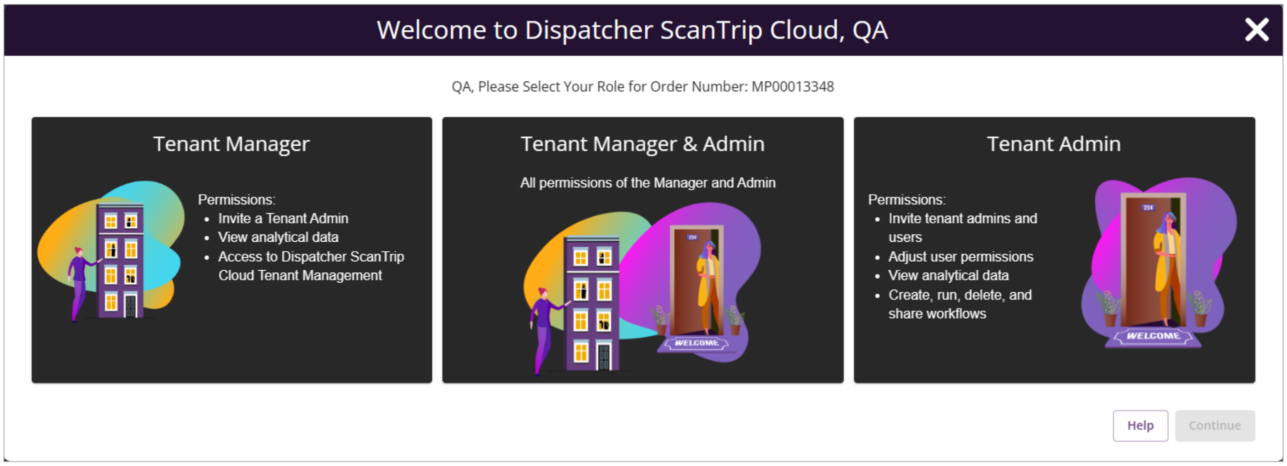
1. Navigate to the Role Selection panel. Do one of the following:

    a. Click on the link in a Tenant Admin invite email.

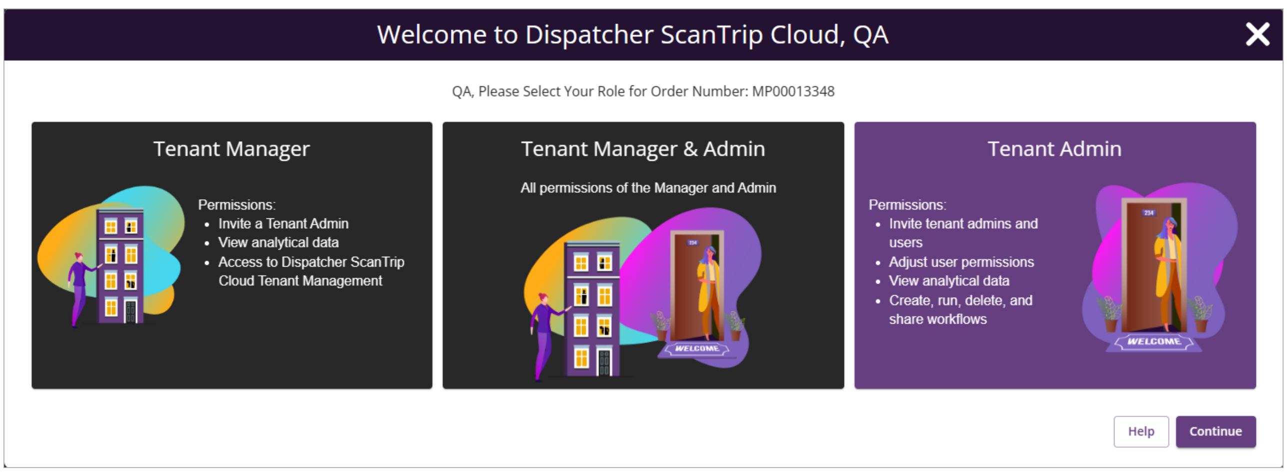
    b. Click on the link in a purchase code redemption email.

Note: If you are expecting an invite email or purchase code redemption email and have not received one, check your Spam folder.

c. Log into Dispatcher ScanTrip Cloud , access the Tenant Management page, and configure an unconfigured tenant after a purchase code has been redeemed.



2. Select the Tenant Admin role.



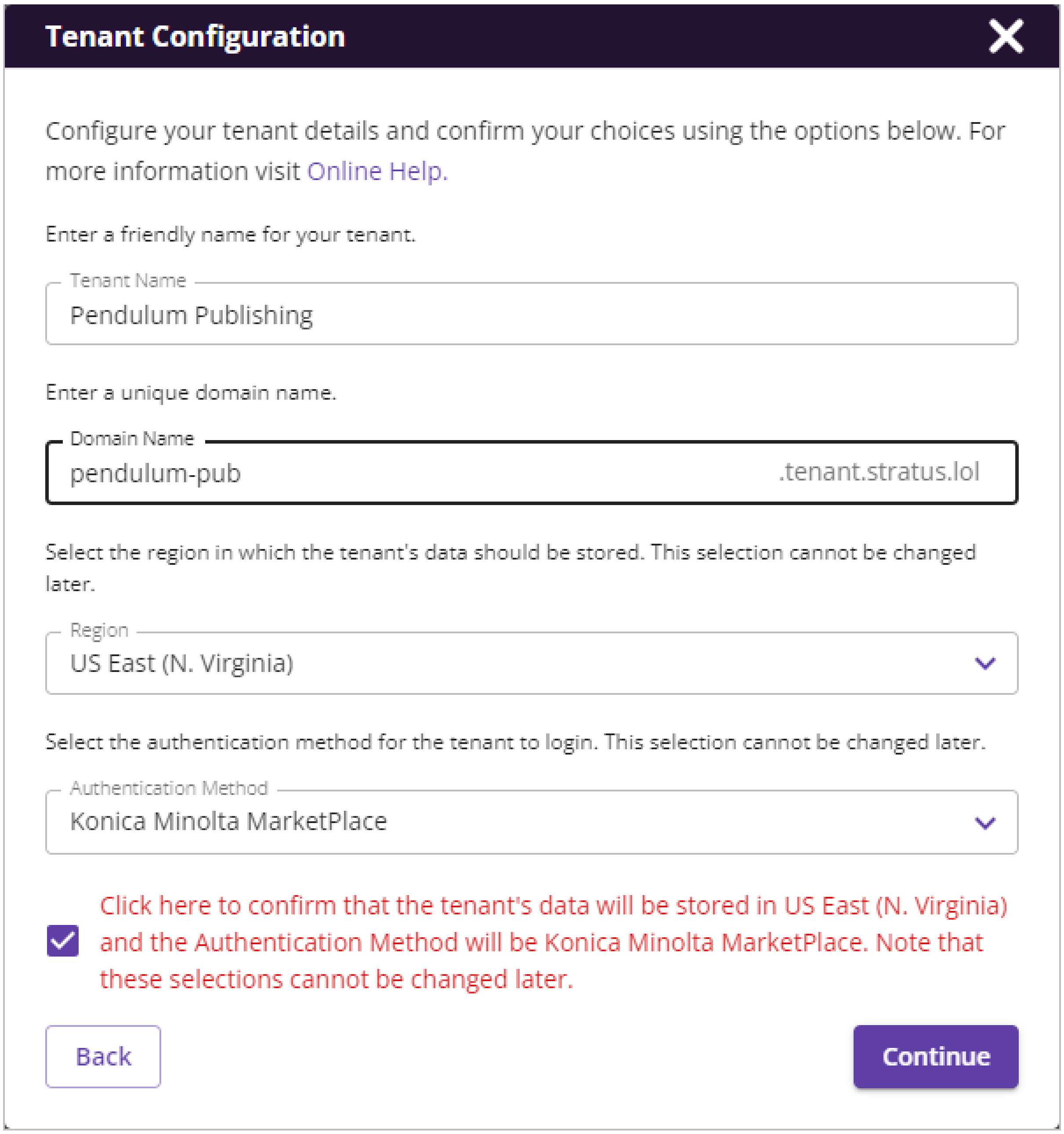
3. Enter the information required in the Tenant Configuration window:
   - **Tenant Name** - A friendly name for your tenant.
   - **Domain name** - A unique URL for your tenant.
   - **Region** - The region in which to store tenant data.
   - **Authentication Method** - The method by which users will log in to your tenant. Options include:
     - MarketPlace - Log in using a Konica Minolta MarketPlace account.

- Cognito - Log in using an Amazon Cognito user directory.
- Entra ID - Log in using Microsoft Entra ID.

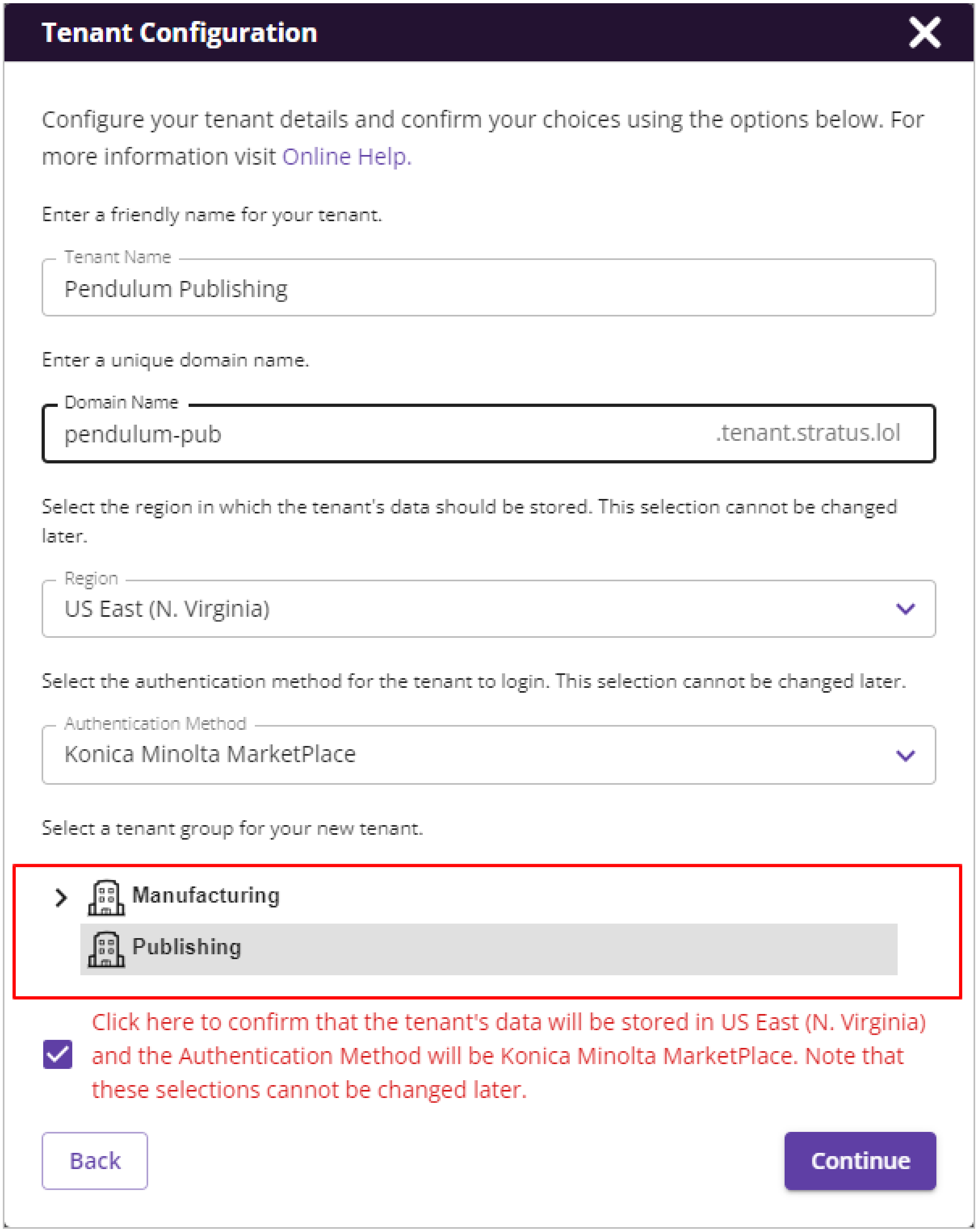
  Note: When selecting the Entra ID authentication method, you will need to provide the Metadata URL, which is provided by the Entra ID app. For more information, see the **Finalizing Tenant Setup for Entra ID Authentication** section below.

Important! The region for data storage and the authentication method cannot be changed later.

4. Select the **checkbox** to confirm your selection of Region and Authentication type.



Note: If you are accessing this window as a Tenant Manager & Admin, as tenant manager you must also specify the tenant group in which the tenant will reside. If you are not a member of any tenant groups, a popup window appears in which you must create a tenant group.



Finalizing Tenant Setup for Entra ID Authentication

After completing tenant setup, you will need to finalize the authentication setup within Microsoft Entra ID before you can log in. Do the following:

1. Navigate to Microsoft Azure. More information about **Microsoft Azure can be found here**.
2. Click on “Microsoft Entra ID”, then “Enterprise applications” in the left-hand menu.
3. Scroll down and click on your configured application.
4. Click on “Single sign-on” in the left-hand menu.

   Note: On this page, you will find the previously mentioned Metadata URL, called “App Federation Metadata URL” in the SAML Certificates section, that you need to provide during tenant configuration.
5. After you have completed the initial tenant configuration (**Described above**), you will receive an email regarding tenant setup from Dispatcher ScanTrip Cloud . Enter the “Identifier (Entity ID)”, “Reply URL (Assertion Consumer Service URL)”, and “Logout URL (Optional)” information provided in this email into those fields within Microsoft Azure.

   Note: If you are expecting an invite email or purchase code redemption email and have not received one, check your Spam folder.
6. Ensure that you have valid information saved in the “emailaddress”, “givenname”, and “surname” fields in the Attributes & Claims section.
7. At this point, Entra ID is a valid authentication method for your Dispatcher ScanTrip Cloud tenant. However, any additional users must be added on the “Entra ID > Users and groups” page before they can login to Dispatcher ScanTrip Cloud .

As a Tenant Manager

For more information about onboarding as a Tenant Manager, contact your Konica Minolta representative.

As a Tenant Manager & Admin

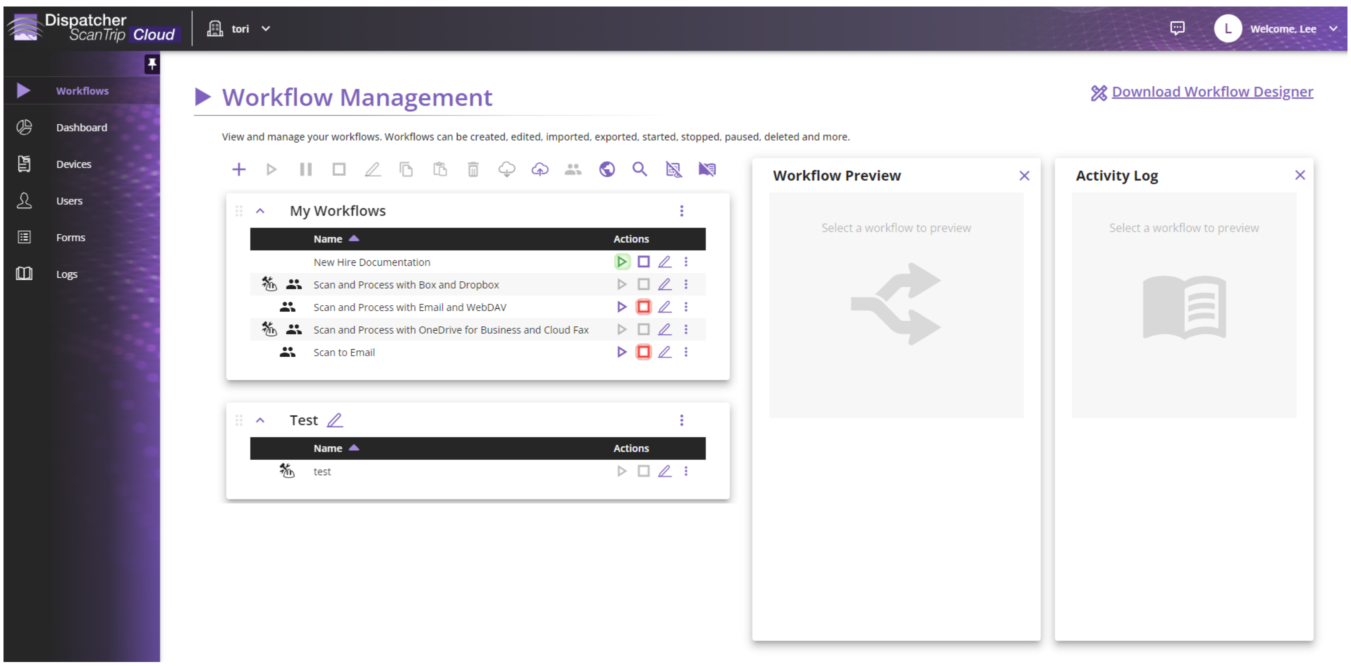
The Tenant Manager & Admin role combines the permissions of the Tenant Manager and Tenant Admin roles. To complete tenancy setup after selecting your role as Tenant Manager & Admin, contact your Konica Minolta representative for more information about completing onboarding as a tenant manager. Then, follow the steps outlined in the **Tenant Admin** section.

Tenants

Tenant Overview

A tenant, or tenancy, is a grouping of at least one purchased license. Tenants can be set up by a third party, such as a dealer, or by the purchasing organization. Within each tenant, the organization can add users, register devices, and manage workflows, each according to the organization's needs. For example, an organization may require only a single tenant with a single device registered. Another organization may have multiple tenancies, one for each of their branches, each with multiple devices registered.

The following illustration shows the **Workflow Management** page.



To get started learning more about this advanced solution, browse through the following topics:

Tenancies and Onboarding

Learn more about redeeming your Dispatcher ScanTrip Cloud purchase code, selecting a role in your new tenant, and getting your Dispatcher ScanTrip Cloud tenancy up and running.

MFP App

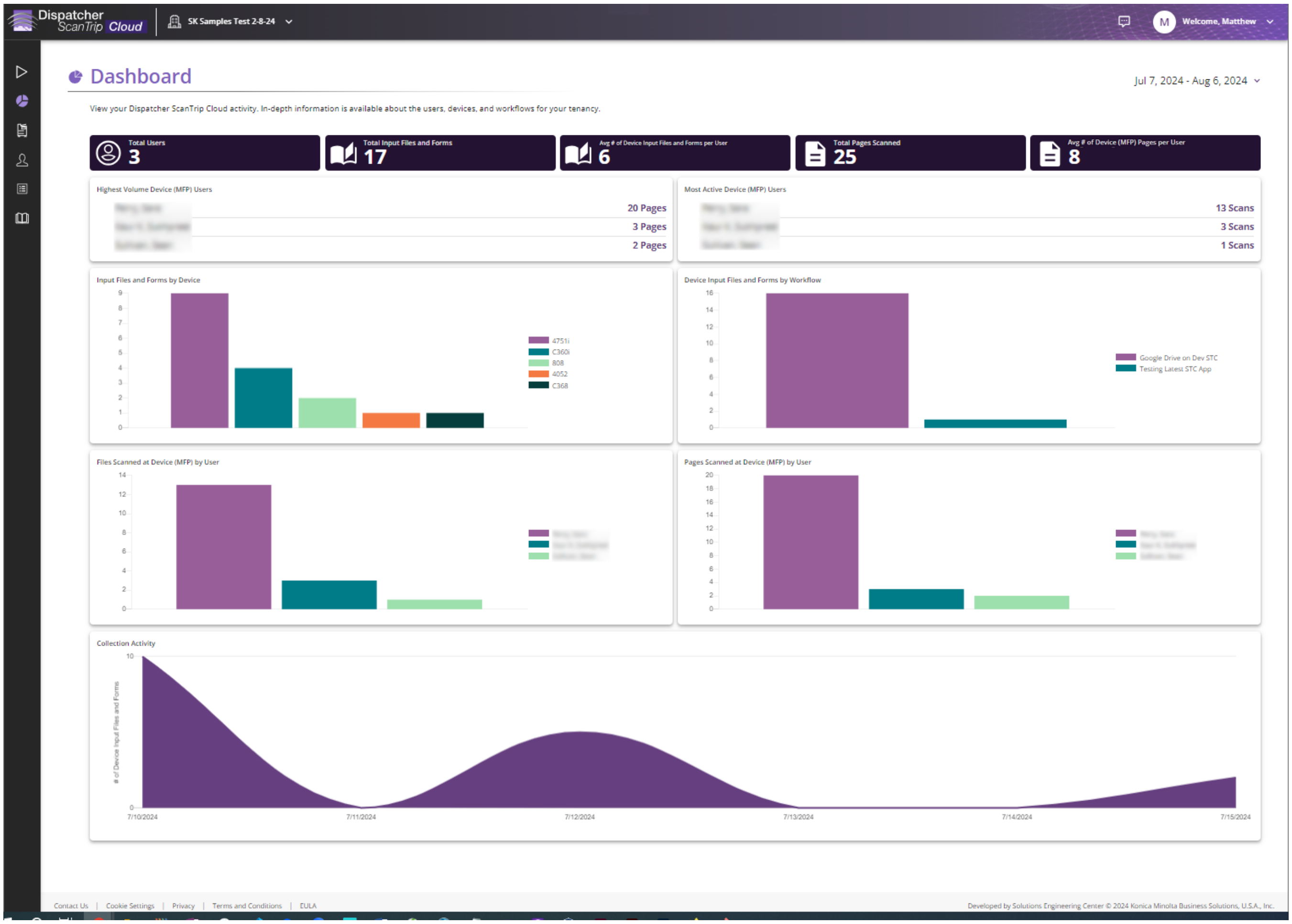
Learn more about the Dispatcher ScanTrip Cloud app for easy workflow access at any supported MFP.

Profile

Learn more about the user information stored by Dispatcher ScanTrip Cloud.

Dashboard

The Admin Dashboard provides a wide array of tenant information at a glance, including user, device, and workflow activity. Tenant admins can access their tenant's Admin Dashboard by selecting **Dashboard** from the Navigation pane.

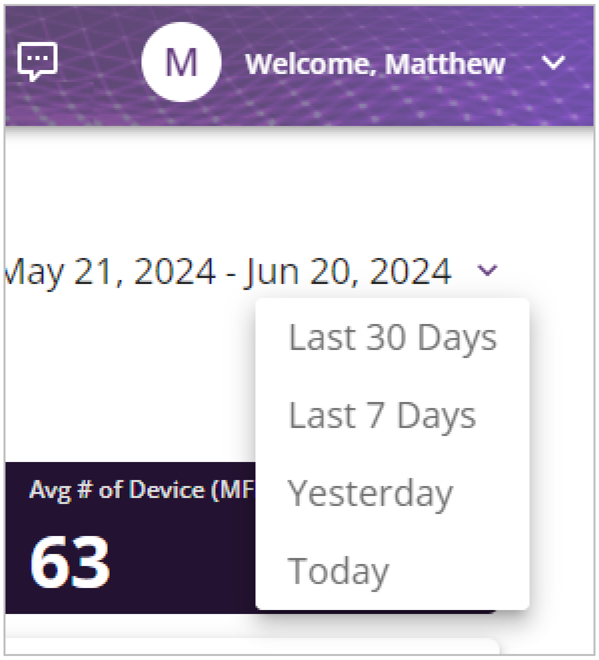


Notes:

- The Dashboard becomes accessible only after the primary tenant admin accepts their admin invitation. No data is generated for the tenant until this occurs.
- Tenant managers can access the **Manager Dashboard**, via which they can access data from any combination of tenants that they manage.

Information Displayed

The dashboard displays data from the selected date range, which appears on the right end of the Dashboard header. To change the date range, select the Date Range dropdown menu and choose a date range from the menu that appears. The dashboard updates to reflect any change in the data set.



Below the Dashboard, tiles display the following information for the tenant:

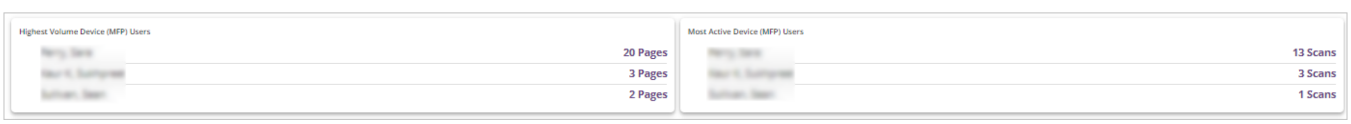
- Total Users
- Total Input Files and Forms
- Avg # of Device Input Files and Forms per User
- Total Pages Scanned
- Avg # of Device (MFP) Pages per User

Note: If no tenant activity occurred for the selected date range, no data appears.

High Achievers

The following panels show information about the highest achieving users in the tenant, including:

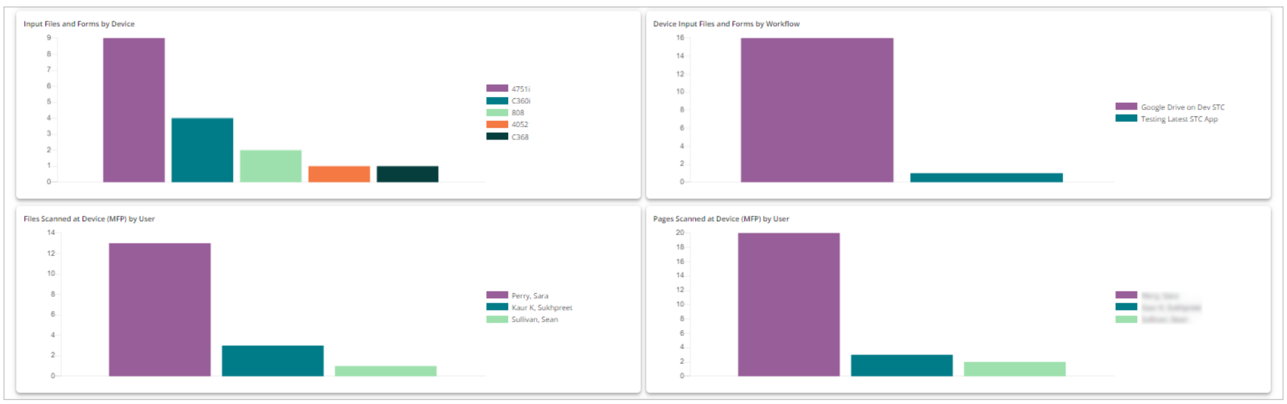
- Highest Volume Device (MFP) Users - The top three tenant members, based on total pages scanned at the MFP.
- Most Active Device (MFP) Users - The top three most active tenant members, based on the total number of scans at the MFP.



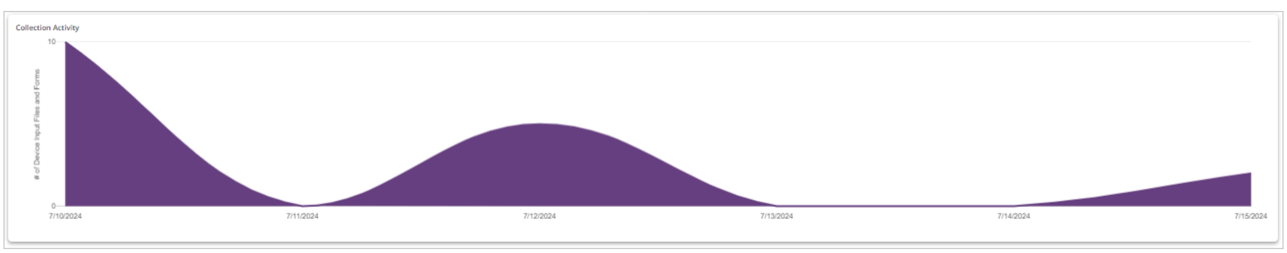
Graphical Data

The following graphs provide additional information on tenant activity. Bar graphs display up to ten bars at a time. Hovering your pointer over a graph displays information about that area of the graph.

- Input Files and Forms by Device - Ranks your devices by the number of documents scanned.
- Device Input Files and Forms by Workflow - Ranks your workflows by the number of documents processed.
- Files Scanned at Device (MFP) by User - Ranks your users by the number of documents scanned at the device.
- Pages Scanned at Device (MFP) by User - Ranks your users by the number of pages scanned at the device.



- Collection Activity - Displays the number of documents scanned during each day of the selected time period.



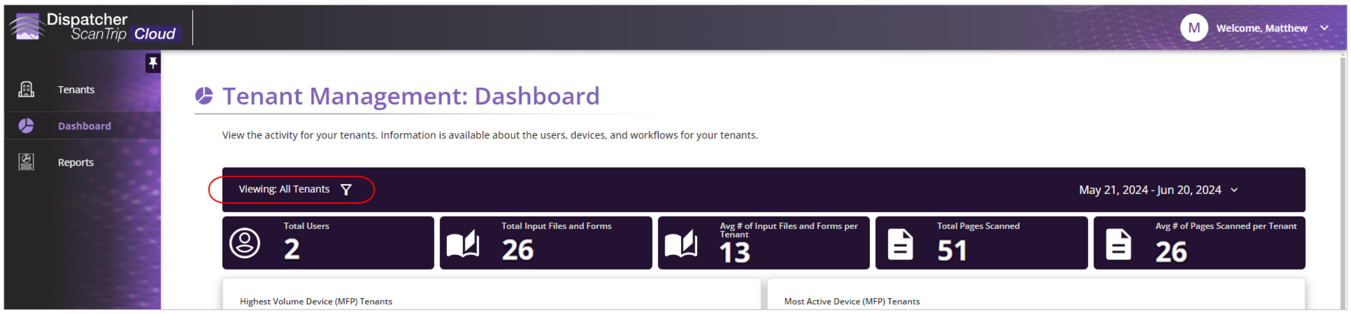
Manager Dashboard

The Manager Dashboard is similar to the Admin Dashboard, with the following exceptions:

- Manager Dashboard is accessible only by tenant managers.
- Manager Dashboard includes the Filter bar. This bar includes:
    - Tenant selector - Includes the following:

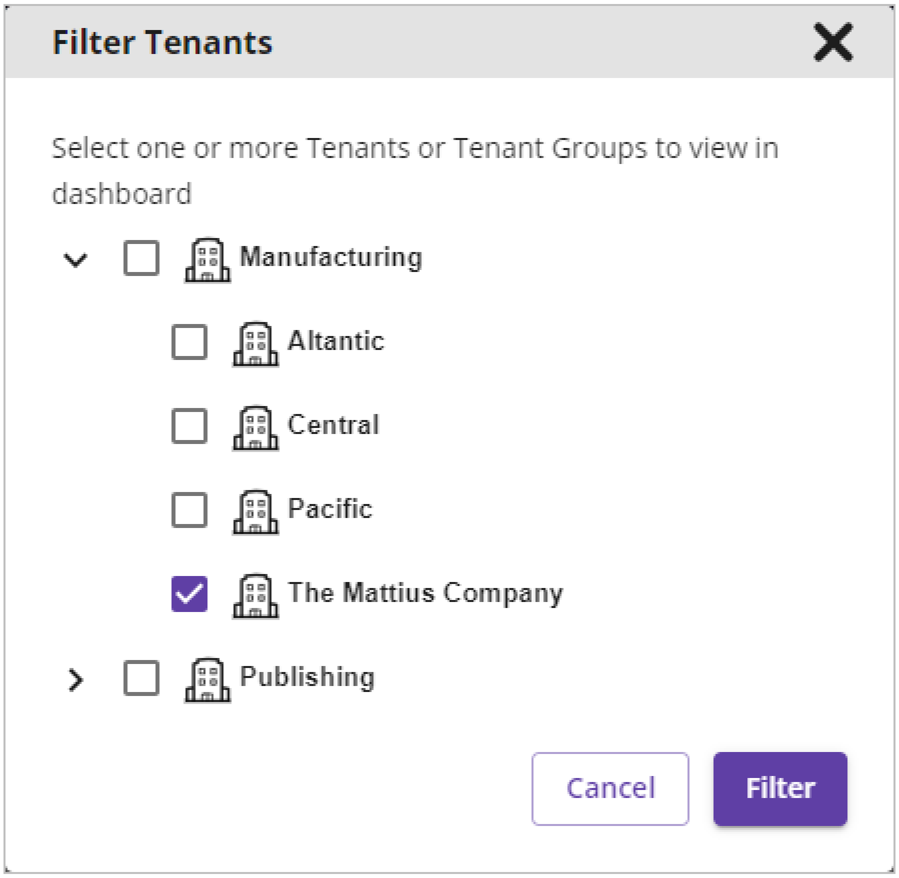
- **Viewing:** - This field lists the tenants and tenant groups currently selected for inclusion in the dashboard data, including one level of subgroups for each tenant group selected. Subgroups having their own subgroups are indicated by a “…” suffix.
- **Filter** - This field accesses the **Filter Tenants** window, in which managers can select one or more tenants and tenant groups to include in the dashboard data. Selecting no tenants and tenant groups includes all data in all managed tenants.

- Manager Dashboard displays some information by tenant instead of by user, as the Admin Dashboard does.



Filtering Tenants

If you select the Filter icon, the Filter Tenants window appears listing a hierarchy of all the tenants you manage. Select the tenants you want to include in your dashboard data, and then select **Filter**.



Device Management

The Dispatcher ScanTrip Cloud portal allows an administrator to manage their fleet of multifunction peripherals (MFPs) with ease. Administrators can add, modify, and remove devices from their Dispatcher ScanTrip Cloud tenant. This can be done individually or in device groups. Once devices have been imported, they are displayed on the Device Management home screen.

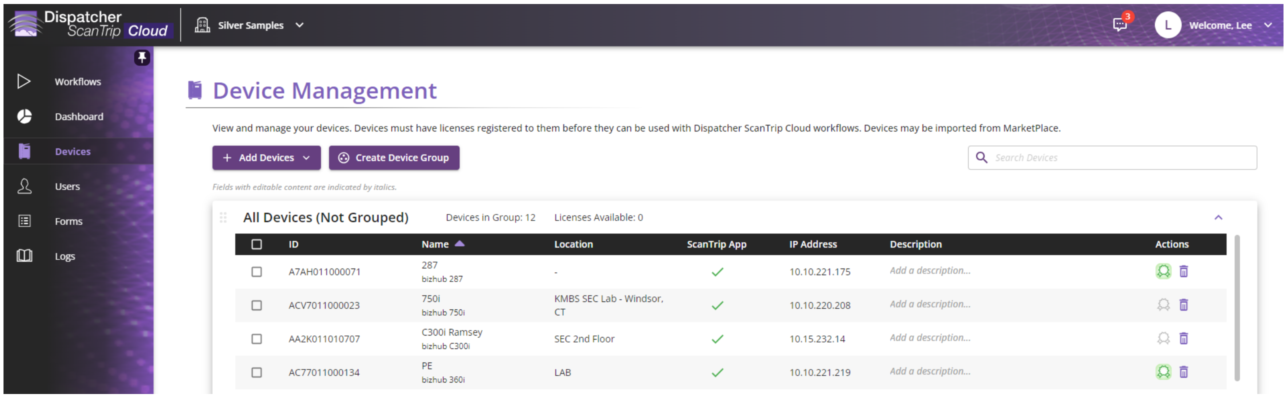
Individual Devices

Each MFP has its own set of installed applications, which can be modified at the MFP or through the Konica Minolta MarketPlace. Each device must be added to your tenancy before it will appear on the Device Management home screen. This can be accomplished individually or in **groups**.

Add Devices

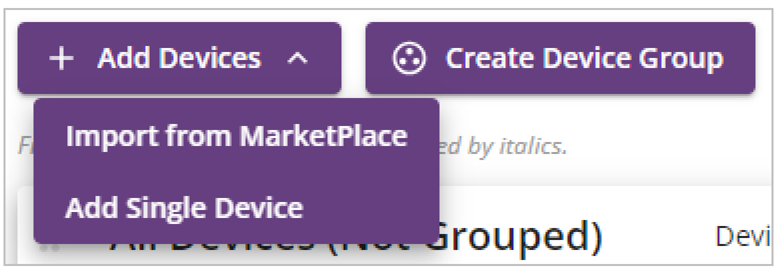
The Dispatcher ScanTrip Cloud Administrator can add new devices to the Dispatcher ScanTrip Cloud installation. To add a new device or devices, do the following:

1. On the Navigation pane, select **Devices**. The Device Management page appears:



2. Select **Add Devices**. The Add Devices menu appears with the following options:

- **Import from MarketPlace**
- **Add Single Device**

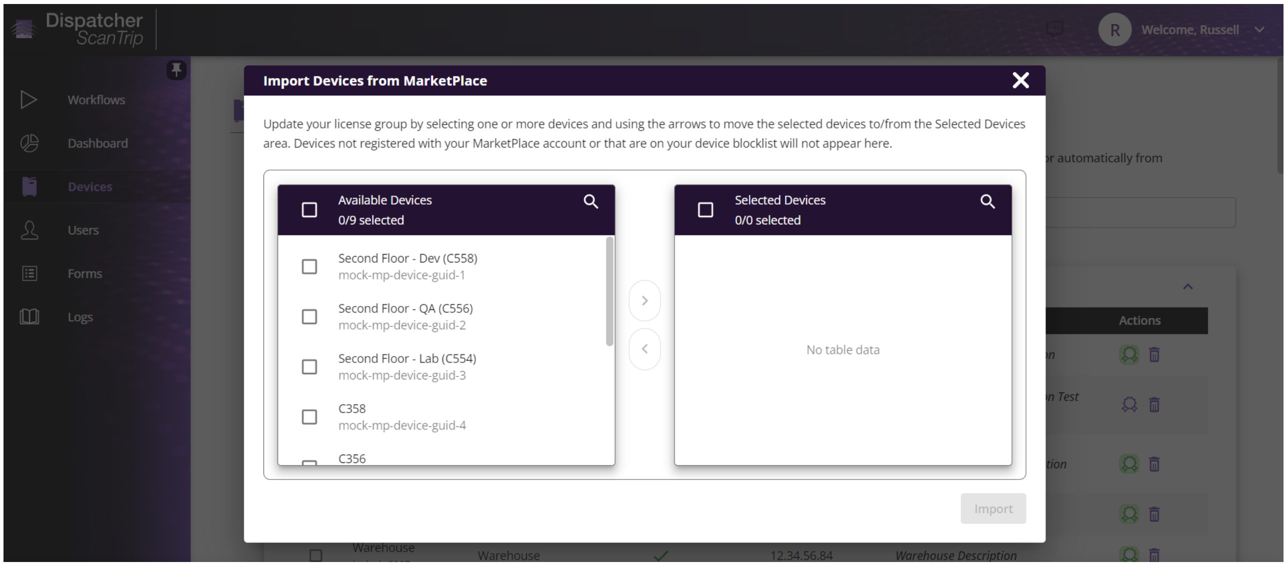


Note: Devices added to a tenant are visible to and usable by any Tenant Admin or Tenant Super Admin users.

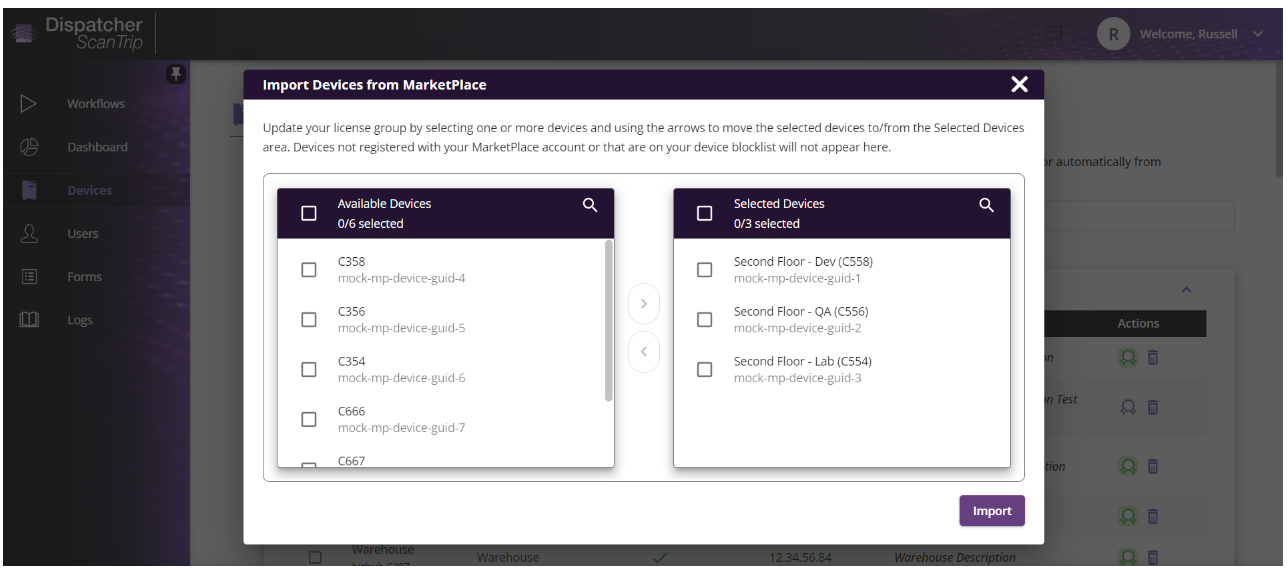
Import from MarketPlace

On the Add Devices menu, select **Import from MarketPlace**. the Import Devices window appears. Do the following:

1. In the Available Devices panel, select the devices to import:



2. Select the **Right Arrow**. The selected devices move to the Selected Devices panel, and the **Import** button activates:



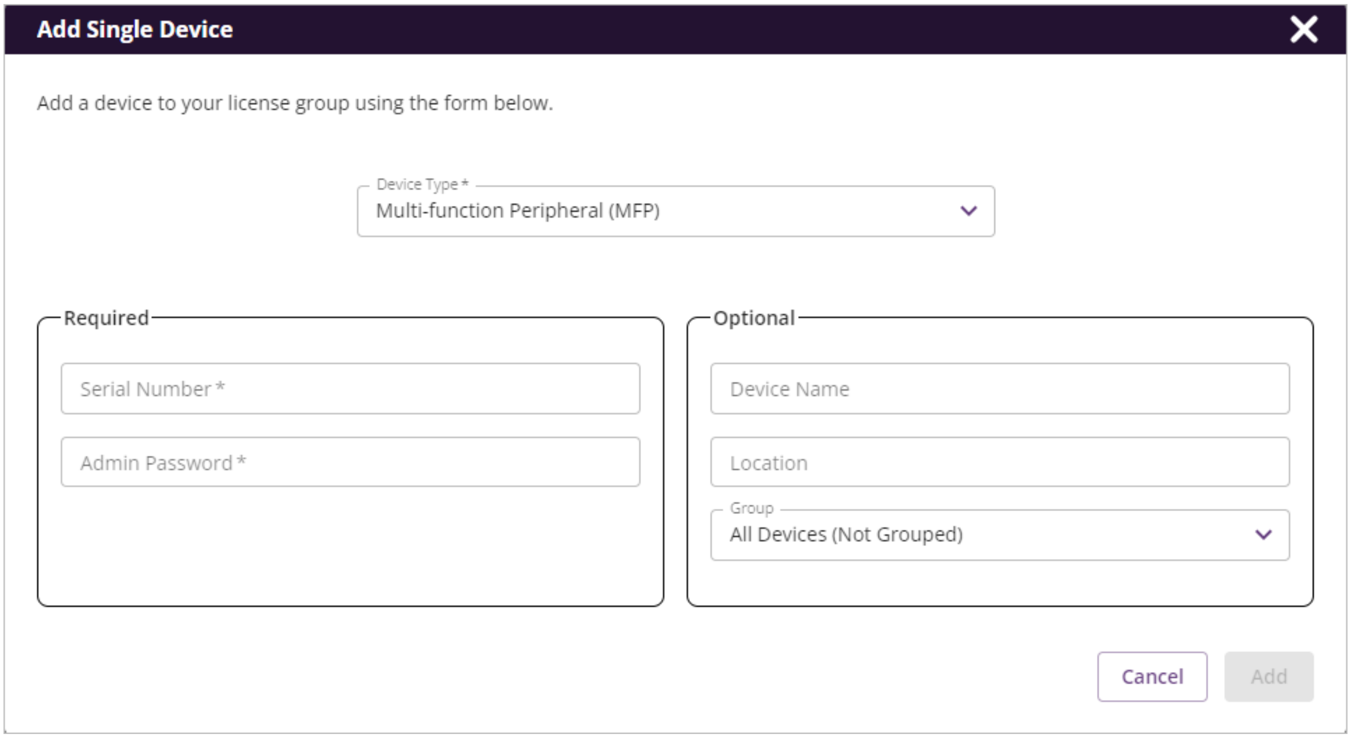
3. To import the selected devices, select **Import**. To abandon the import, select **X**.

Notes:

- To remove devices from the Selected Devices panel, select them and then select the **Left Arrow**. The devices return to the Available Devices panel.
- To search for devices in a panel, select the **Magnifying Glass**, then enter a search string in the Search field that appears.

Add Single Device

After selecting the Add Single Device option, the Import Devices window appears.



1. Select a **Device Type** from the drop-down menu. This may populate additional required fields.
2. Enter any information needed in the Required section. For example, multifunction peripheral (MFP) devices require:
    - Serial Number
    - Admin Password

    Note: Dispatcher ScanTrip Cloud will not allow devices to be added with the default password. The default password will need to be updated before they can be added to your tenant.
3. Enter any additional information you would like:
    - Device Name - A friendly name for the device
    - Location - The physical location for the device, such as “HR Department”
    - Group - Devices can be added to a **Device Group** immediately
4. Select the **Add** button.

    Important!

    - Device information cannot be edited later on.
    - After adding a device, it may take some time to sync with MarketPlace. The sync setting is controlled in the MarketPlace app and defaults to 60 minutes from the previous sync. To

force an MFP to sync with MarketPlace, you can log into the MarketPlace App Manager at the MFP, tap the Setting button, tap the Device tab, and tap the “Sync Now” button.

Device Table

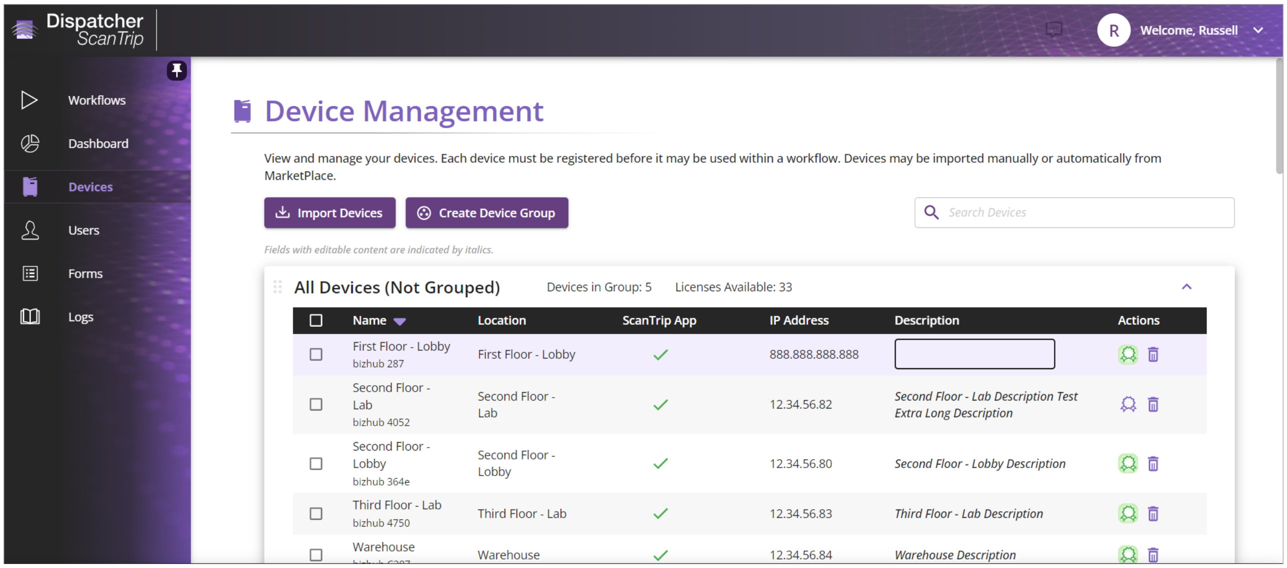
Devices are displayed in tables, along with information about each device, including:

- **ID** - The device’s unique ID number.
- **Name** - The friendly name of the device. This can be entered when you add the device or edited in MarketPlace, but cannot be changed in the tenant.
- **Location** - The physical location of the device (e.g. Human Resources - Floor 2). This can be entered when you add the device or edited in MarketPlace, but cannot be changed in the tenant.
- **App Installed** - Whether the Dispatcher ScanTrip Cloud App is installed on the device. If you have recently installed the app, it can take up to an hour to update within your tenant. Alternatively, you can force the update by going to the MFP > App Manager > MarketPlace App > Sync Now.
- **IP Address** - The IP address of the device.
- **Description** - A friendly description of the device. This is editable within your tenant.
- **Actions**
    - **Register/Unregister Device** - Assign a license to this device or return a license to your pool of licenses.
    - **Delete Device** - Remove the device from your tenant. It can be added again at a later date.

Edit Devices

You can edit the description of a device to make device management easier. To edit a device description, do the following:

1. Click in the **Description** field on the right side of the device entry.



2. When you are finished, clicking outside of the field will save the entry.

   Note: The Description is limited to 100 characters. Long descriptions without spaces will be truncated on the home page.

Register/Unregister Devices

After adding devices to your Dispatcher ScanTrip Cloud tenant, you can distribute your device licenses to those devices, as needed. To register a device, do the following:

1. Select the **Medal** icon in the Actions column. The Register License to Device window appears.
2. To register the device, select **Yes**. Otherwise, select **No**.

Medal Icon

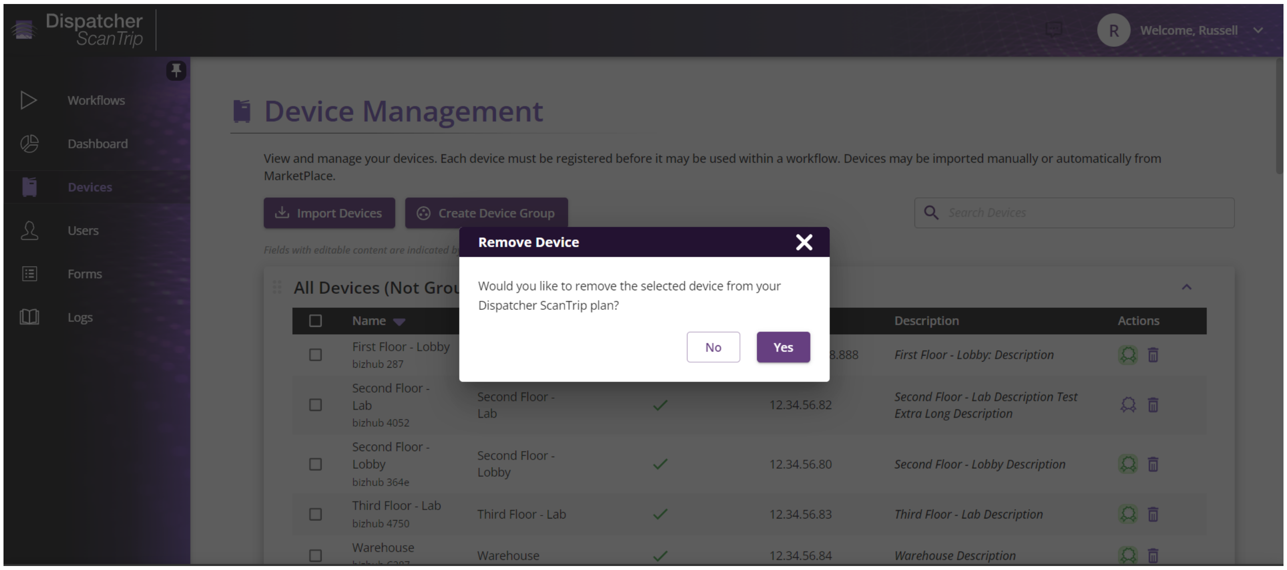
The medal icon displays in the Actions column. Its color indicates the license registration status of the device:

- Green - The device is registered and is available for use with workflows.
- Purple - The device is not registered, but a license is available on which to register the device.
- Gray - No licenses are available on which to register the device. For more information about modifying your license and how it will affect your available licenses, see the **Settings** page.

Remove Devices

To remove a device, do the following:

1. Select the **Trash Can** icon in the Actions column. The Remove Device window appears:



2. To remove the device, select **Yes**. Otherwise, select **No**.

Note: Devices that have been removed from your tenant can be re-imported from MarketPlace.

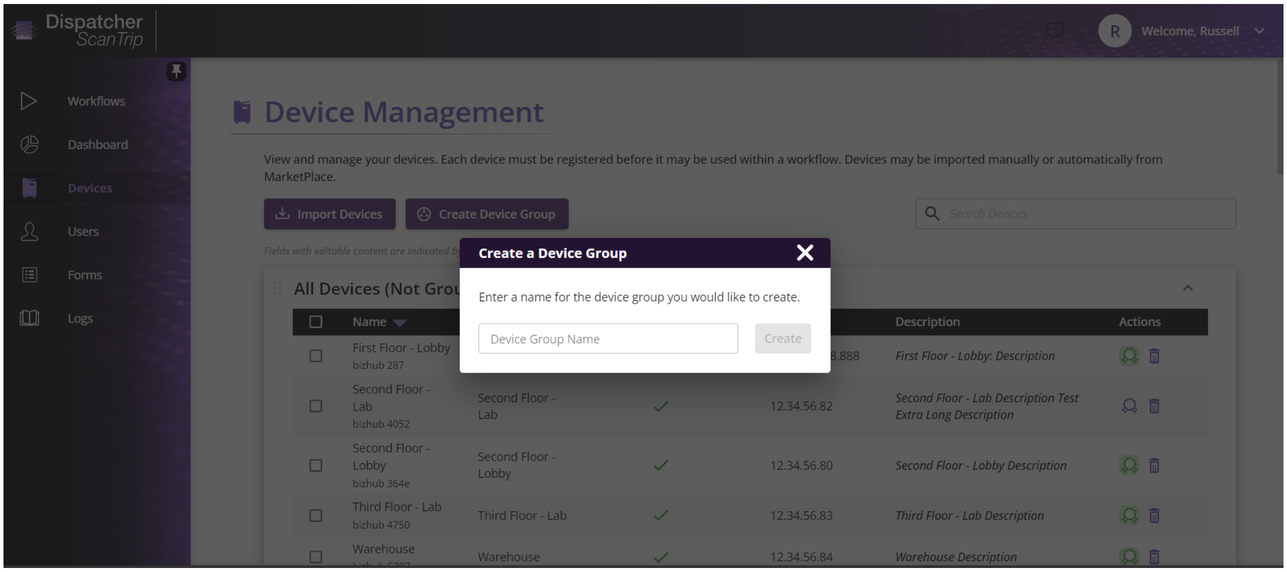
Device Groups

You can create device groups, in which you organize and manage your devices. Device groups can contain any number of devices, and single devices can be part of multiple groups.

Create a Device Group

Tenant admins can create device groups for easy viewing and categorization. To create a new device group, do the following:

1. Click on the **Create Group** button at the top of the Device Management home page.
2. Enter a name for the Device Group, then click **Create**.



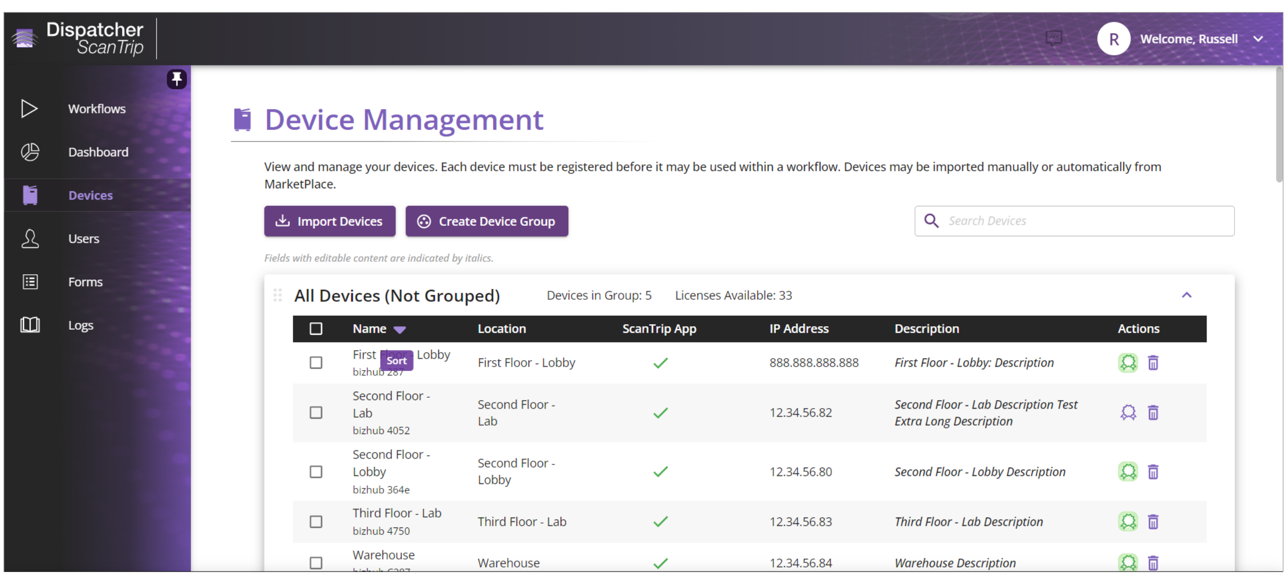
Edit a Device Group

Device Groups can be edited in several different ways.

Sort Devices Within a Group

Administrators can adjust the view of their Device Groups in several ways. The default organization is alphabetically by Device Name. To change the order, do the following:

1. Click the arrow next to the column you would like to sort by.



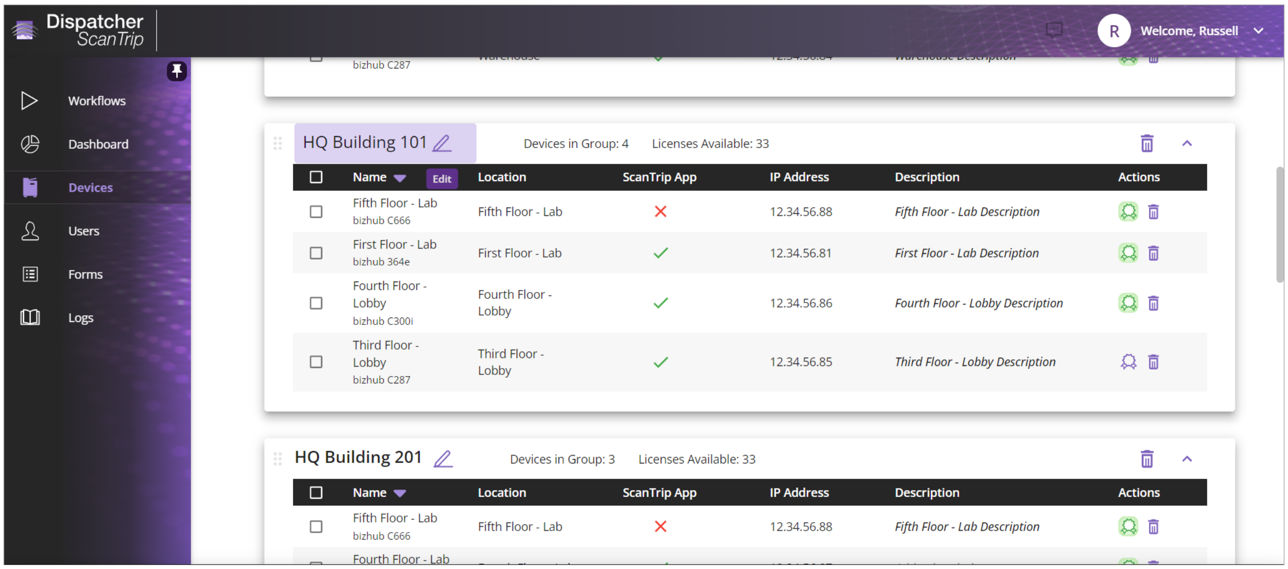
Note: Columns are automatically sorted alphanumerically.

2. To sort in reverse alphanumeric order, click the arrow again.

Edit the Device Group Name

To edit the Device Group Name, do the following:

1. Click in the Device Group Name area.



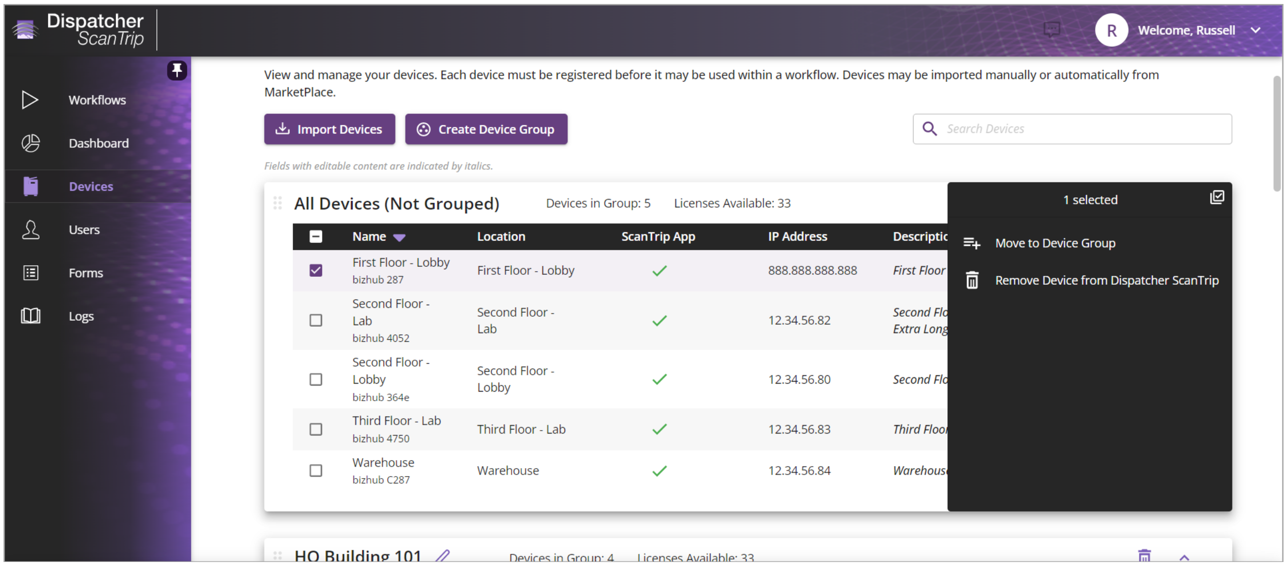
2. Type the new Device Group Name.

3. Click anywhere else on the screen. The name will be saved automatically.

Move a Device to Device Group

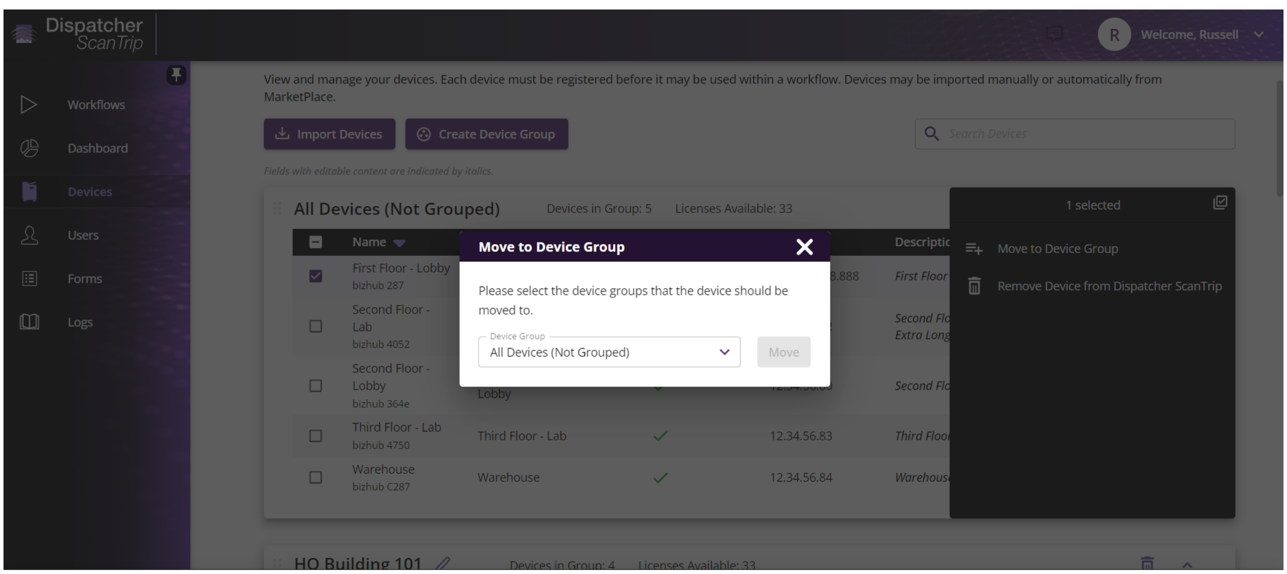
To move a device from one Device Group to another, do the following:

1. Click on the checkbox on the left side of the Device entry. This will open a menu on the right side.



Note: You can select multiple Devices to move at the same time.

2. Click on the **Move to Device Group** action and select the Device Group you would like to move the selected devices to.

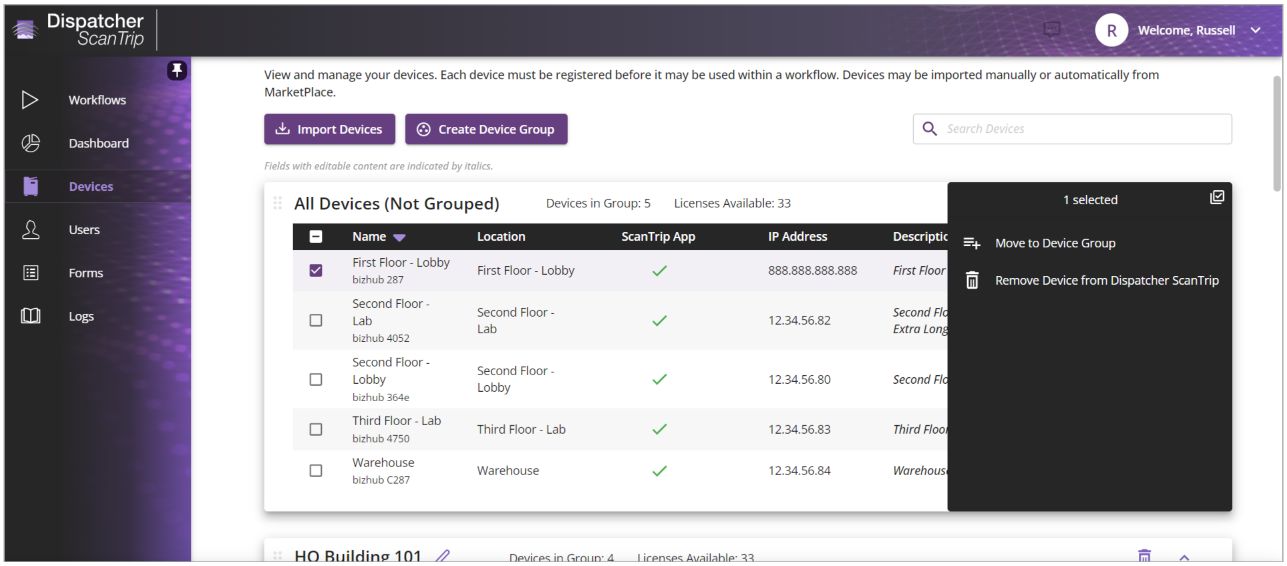


3. Click the **Move** button.

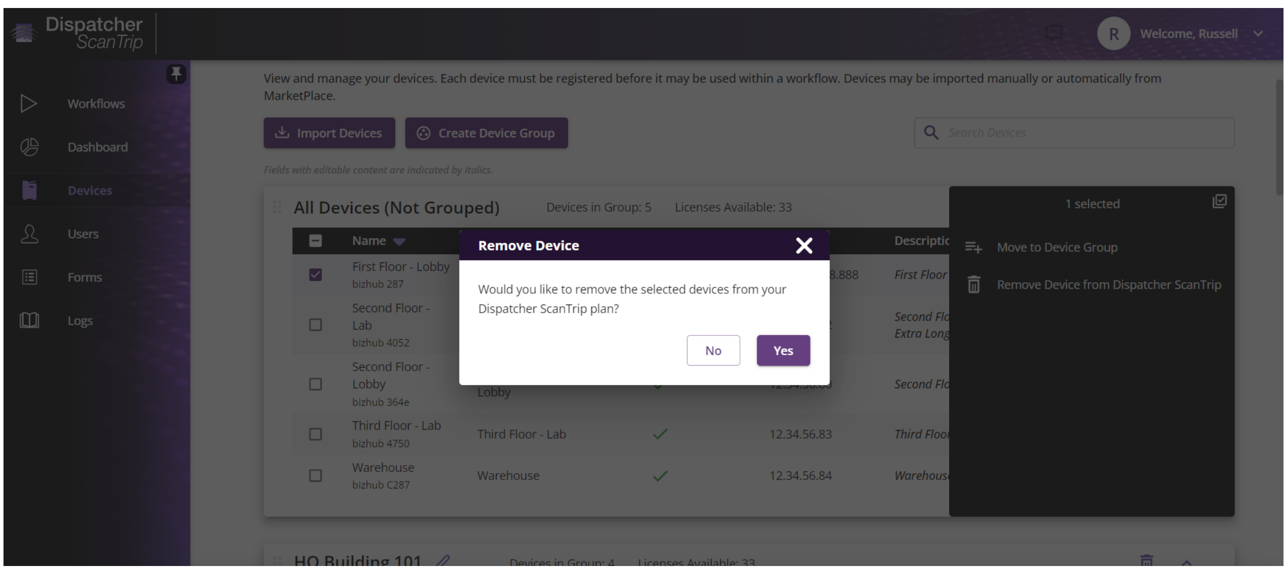
Remove a Device from a Device Group

To remove a device from a Device Group, do the following:

1. Click on the checkbox on the left side of the Device entry. This will open a menu on the right side.



2. Click on the **Remove Device from Dispatcher ScanTrip Cloud** action.

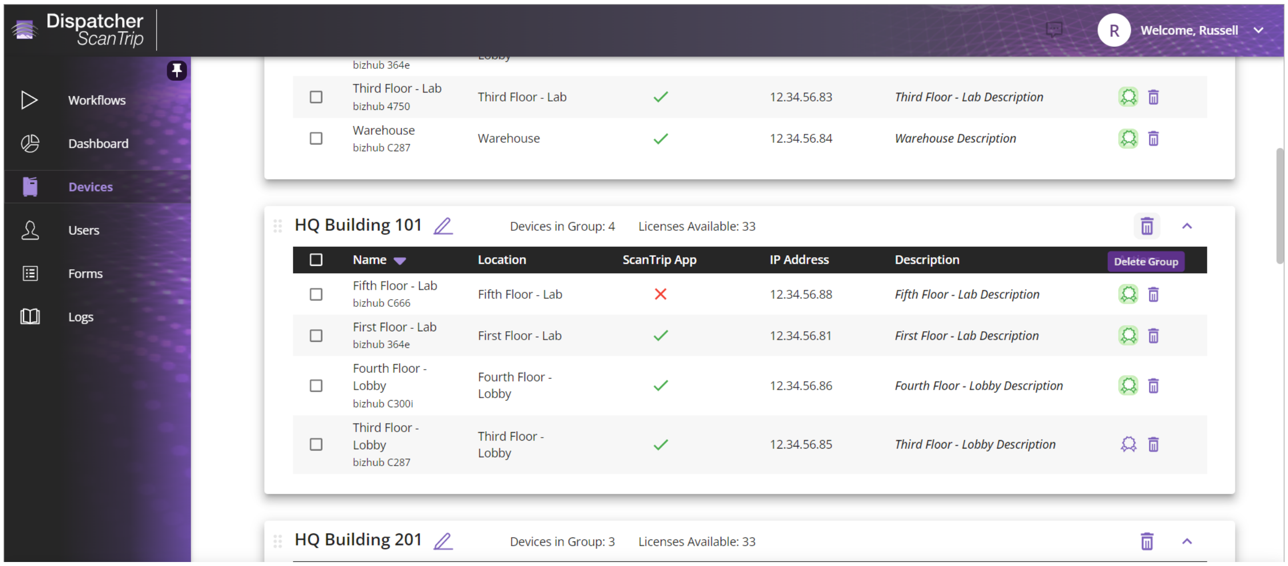


3. Click **Yes** to remove the device.

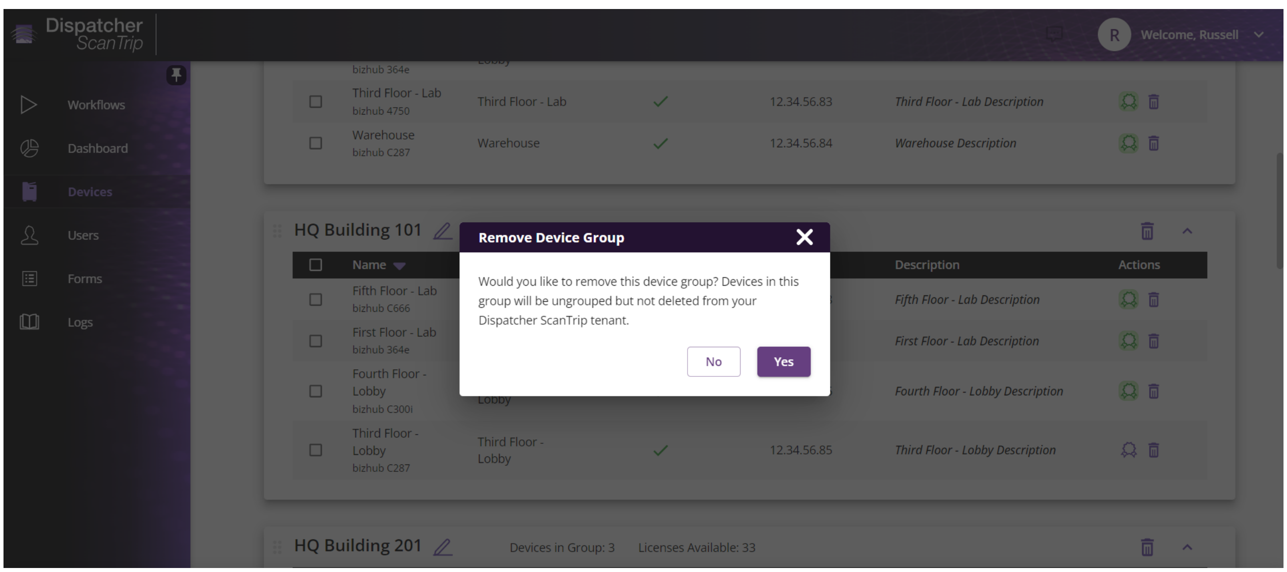
Delete a Device Group

To delete a Device Group, do the following:

1. In the top menu bar of the group you wish to delete, click the **Delete Group** button next to the Group Name.



2. This will open a small window asking you to confirm your action. To continue deleting the group, click the **Delete** button.



Note: Devices in the deleted group will be moved to **All Devices (Not Grouped)**.

Form Builder

The Form Builder page provides users with a simple, drag-and-drop interface for creating custom forms that can be included in Dispatcher ScanTrip Cloud workflows and accessed at the MFP panel. Using a form at the MFP, you can enter identifying information about your scanned documents, choose processing and destination options, and more. Information associated with a form, such as default values and data entered by the user at the MFP, is available within the workflow as metadata, which can be used in a variety of ways.

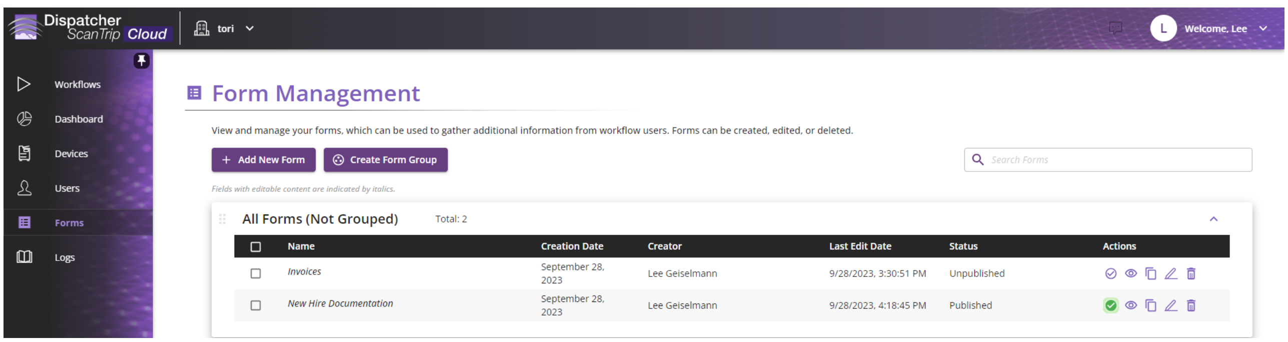
Important! Since a single workflow can contain multiple forms, each metadata key must be unique. If there are two or more identical metadata keys, each will override the previous one; only the last value will be saved.

Accessing the Form Builder

To begin building forms, you must first access the Form Builder tool. Note that to access the Form Builder, you must be a **tenant admin**.

To access the Form Builder, do the following:

1. Log into your Dispatcher ScanTrip Cloud account.
2. From the Navigation pane, select Forms. The Form Management page appears:



3. To create a new form, select **Add New Form** to open the Form Builder. To open an existing form, select the associated **Edit** icon in the Actions column.

   Note: To edit an existing form, it must be in an **unpublished** state.

The Form Builder page provides an intuitive, drag-and-drop interface for creating custom forms you can include in Dispatcher ScanTrip Cloud workflows and access at the MFP panel. Using a form at the MFP, you can enter identifying information about your scanned documents, choose processing and destination options, and more. Information associated with a form, such as default values and data entered by the user at the MFP, is available within the workflow as **metadata**, which can be used in a variety of ways.

Note: The Form Builder has a number of pre-built **Sample Forms** that can help make form creation easier.

Form Builder

The following sections provide detailed information about the Form Builder:

- **Navigation Bar**
- **Fields Panel**

- **Form Builder Canvas**
- **Field Properties Panel**

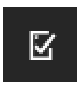
The following buttons appear on the Footer bar:

- **Cancel** - Close the Form Builder, abandoning any pending changes.
- **Save** - Save the form and continue editing.
- **Save and Close** - Save your changes to the form, and close the Form Builder. The form will now be accessible on the **Form Management** page and in the **Form Selector** node (if it had previously been **published**).

Navigation Bar

This vertical bar appears on the far left of the page. It contains icons, including the following:

Validate



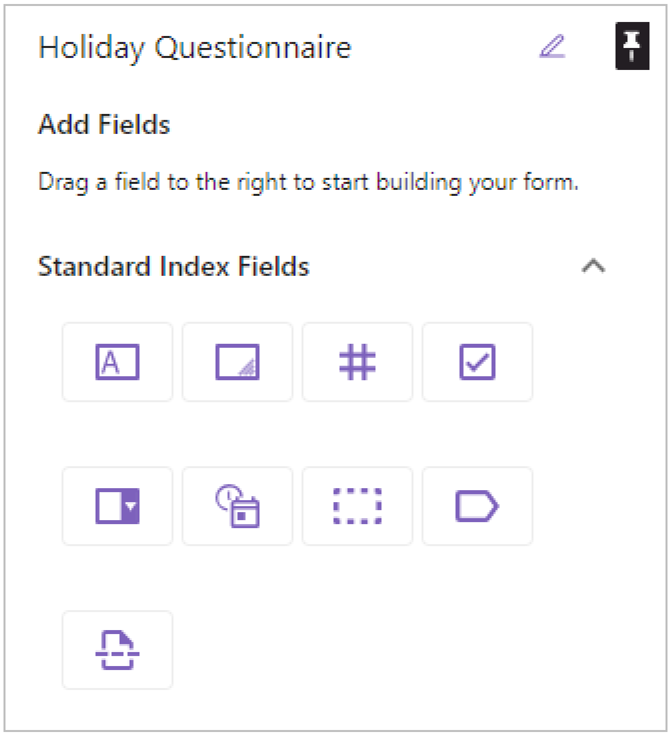
Select the **Validate** icon to check the form for logic errors, such as missing queries or improperly configured fields. A form must be successfully validated before it can be published on the **Form Management** page.

If the form passes validation, you will receive a notification. If the form does not pass validation, the issues will be described in the **Error List** that appears below the Form Builder Canvas.

Fields Panel

This panel appears on the left side of the screen and provides links to the Standard Index Fields. The list of fields available for Standard forms differs slightly from the list for Advanced forms. The Form Name field appears on the panel’s header bar. To edit the form name, select the Pen icon. To pin/unpin the panel, select the Pin icon  on the header bar.

The following illustration shows the Fields panel for an Advanced form called Holiday Questionnaire:



Standard Index Fields

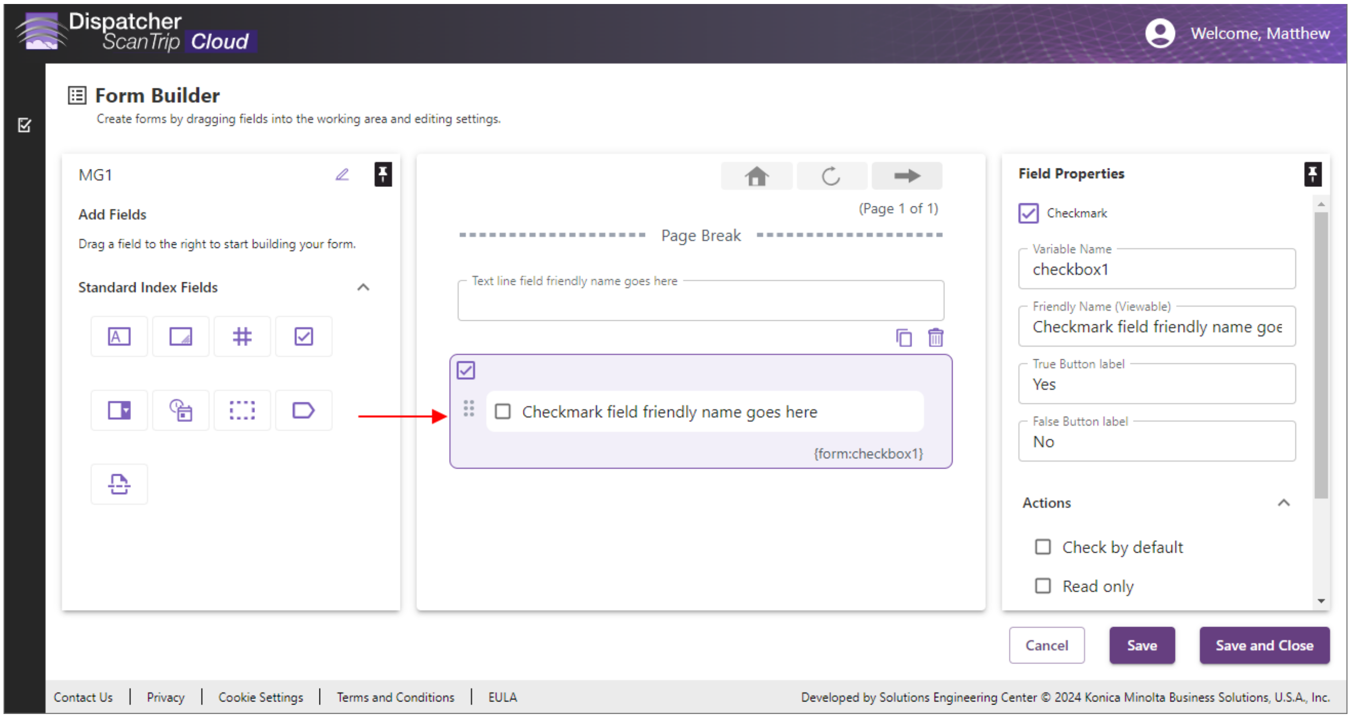
You can add the following fields to your form:

Icon	Field	Description
	Text Line	A text line field allows the user to input a single line of text about the scanned document(s), such as a document name or vendor name.
	Text Area	A text area field allows the user to input multiple lines of text about the scanned document(s), such as document names or vendor names.
	Number	A number field allows the user to input a number, such as an invoice number or user ID.
	Checkmark	A checkmark 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.
	Drop-down	A drop-down list allows the user to choose an item from a list.
	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 user.
	Label	A label is static text to be displayed on the form.
	Page Break	A page break divides the form into different screens.

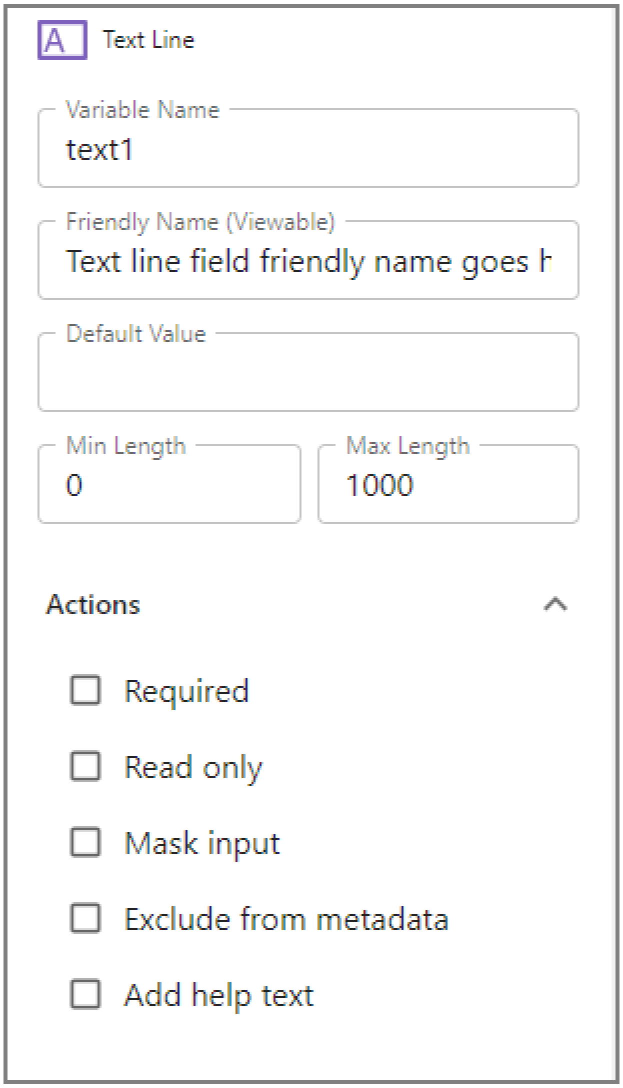
Working With Form Fields

For fields added to a form, you have the following options:

- Identify a field - Hover over the icon in the upper-left corner to display the field type.
- View variable name - Select a field to display the variable name associated with the field in the lower-right corner.
- Rearrange forms - Select the six-dot icon on the left side of the field and drag to the desired location.
- Duplicate a field - Select the **Create a duplicate field** icon in the upper-right corner of the field.
- Delete a field - Select the **Delete field** icon in the upper-right corner of the field.



Adding a Text Line Field



To add a text line field to your form, drag and drop the **Text Line** icon to the Form Builder Canvas area. Select the newly created field to customize its properties in the Field Properties panel on the right. 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. Spaces are not allowed. All variable names in a form must be unique.

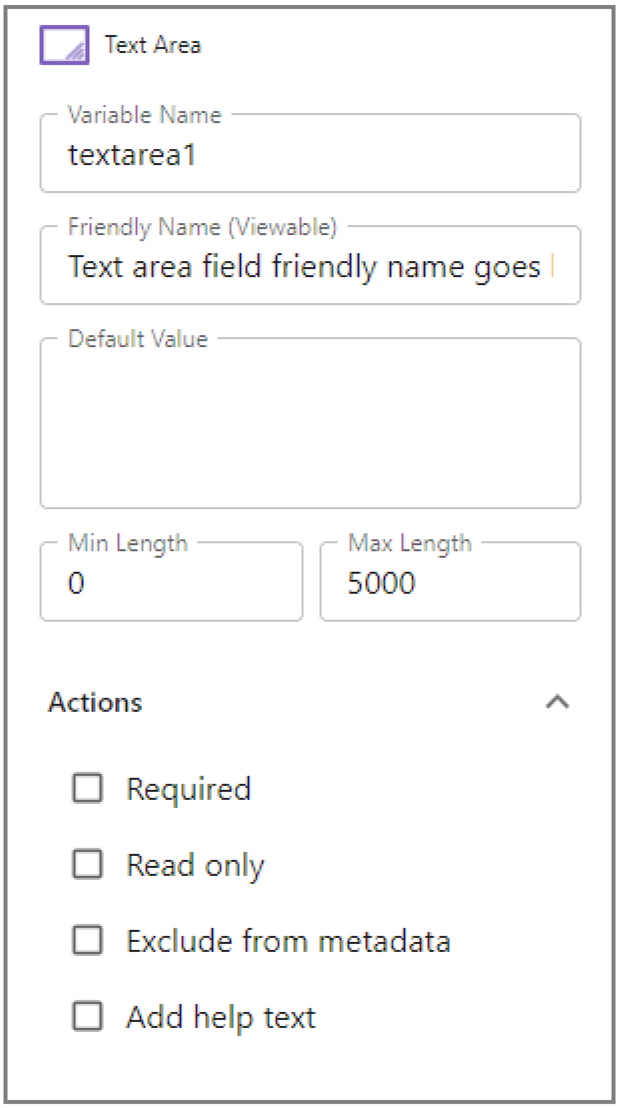
  This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: `{form:[name of variable]}` (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax `{form:name}`).

- In the **Friendly Name** field, enter the text that will appear above the text field. The Friendly Name will always be visible to users who access the form.
- 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 **Actions** area, you can specify the following, based on which options you select:
  - **Required** - Set as a mandatory input field. Required fields are marked with an asterisk (*).
  - **Read only** - Set as a read only field that cannot be changed.
  - **Mask input** - Mask any text entered by the user.
  - **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 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.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Text Area Field



To add a text area field to your form, drag and drop the **Text Area** icon to the Form Builder Canvas area. Select the newly created field to customize its properties in the Field Properties panel on the right. You can do the following:

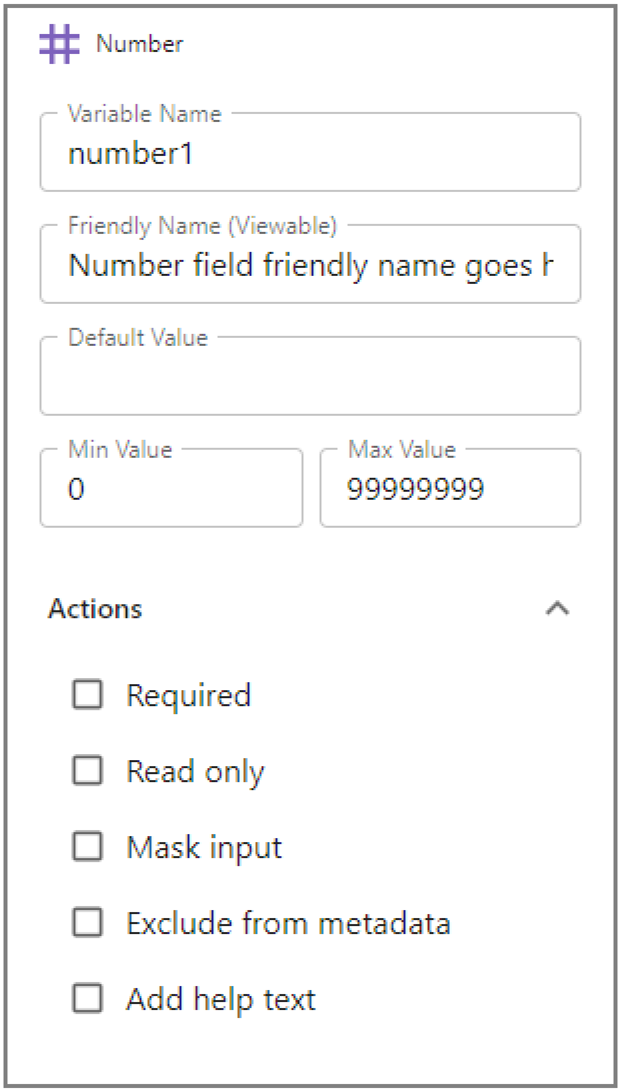
- In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users. Spaces are not allowed. All variable names in a form must be unique.

  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}`).

- In the **Friendly Name** field, enter the text that will appear above the text field. The Friendly Name will always be visible to users who access the form.
- 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 **Actions** area, you can specify the following, based on which options you select:
  - **Required** - Set as a mandatory input field. Required fields are marked with an asterisk (*).
  - **Read only** - Set as a read only field that cannot be changed.
  - **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 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.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Number Field



To add a number field to your form, drag and drop the **Number** icon to the Form Builder Canvas area. Select the newly created field to customize its properties in the Field Properties panel on the right. You can do the following:

- In the **Variable Name** field, enter an internal, identifying name for the field. The variable name will not be visible to users. Spaces are not allowed. All variable names in a 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}`).

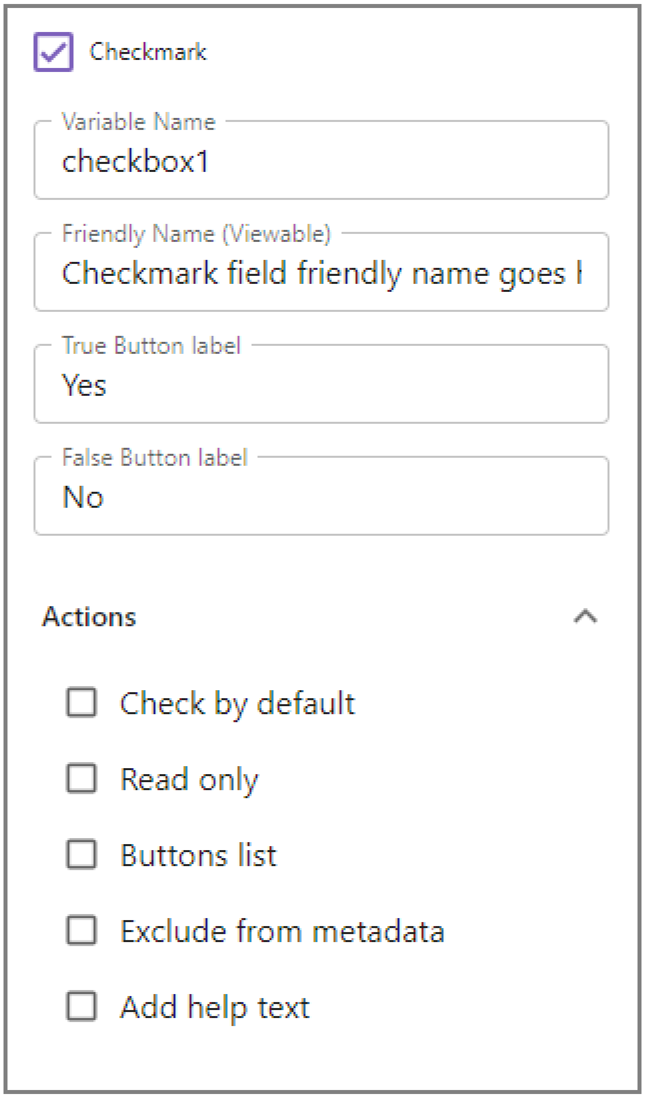
- In the **Friendly Name** field, enter the text that will appear above the number field. The Friendly Name will always be visible to users who access the form.

- In the **Default Value** field, specify the value that will appear in the field when the form first loads. 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 **Actions** area, you can specify the following, based on which options you select:
  - **Required** - Set as a mandatory input field. Required fields are marked with an asterisk (*).
  - **Read only** - Set as a read only field that cannot be changed.
  - **Mask input** - Mask any text entered by the user.
  - **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 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.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Checkmark



To add a checkmark box to your form, drag and drop the **Checkmark** icon to the Form Builder Canvas area. Select the newly created field to customize its properties in the Field Properties panel on the right. 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. The variable name will not be visible to users. Spaces are not allowed. All variable names in a form must be unique.

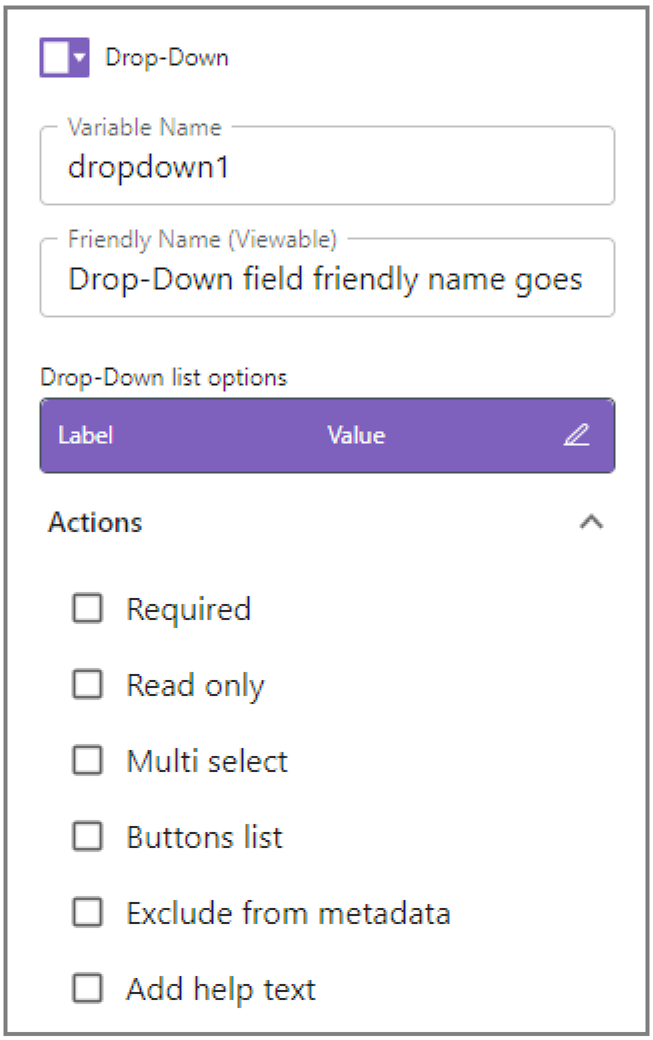
  This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: `{form:[name of variable]}` (e.g., if the variable name is 'name,' the variable name could be referenced in other nodes using this syntax `{form:name}`).

- In the **Friendly Name** field, enter the text that will appear above the checkmark options. If one is provided, the Friendly Name will be visible to the users on the form.
- Customize the labels for the buttons that will appear in the **True Button Label** and **False Button Label** fields.
- In the **Actions** area, you can specify the following, based on which options you select:

- **Check by Default** - Set this option as automatically selected.
- **Read only** - Set as read only buttons that cannot be changed.
- **Buttons List** - Provides the field with buttons instead of checkboxes.
- **Exclude from metadata** - Do not include the variable as metadata associated with the document. Metadata from this field cannot be accessed, even by typing in the metadata key manually.
- **Add help text** - Supply help information about the field. This help information will be accessed when the user taps a question mark icon next to the field. When this option is enabled, an “Edit help text” box will appear below, in which you can enter text.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Drop-down List



To add a drop-down list to your form, drag and drop the **Drop-down List** icon to the Form Builder Canvas area. Select the newly created field to customize its properties in the Field Properties panel on the right. You can do the following:

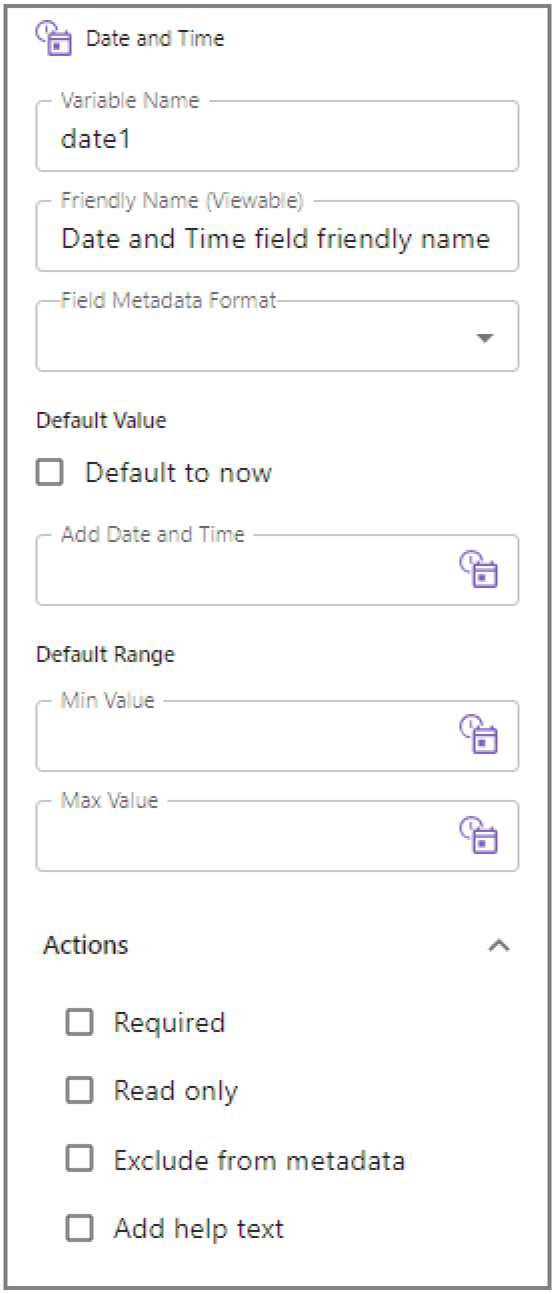
- In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users. Spaces are not allowed. All variable names in a form must be unique.

  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}`).

- In the **Friendly Name** field, enter the text that will appear above the drop-down list. The Friendly Name will always be visible to users who access the form.
- In the **Drop-down list options** area, enter the text and values that will appear in the drop-down list. For more information, see the **Manually Adding List Items** section below.
- In the **Actions** area, you can specify the following, based on which options you select:
  - **Required** - Set as a mandatory field. Required fields are marked with an asterisk (*).
  - **Read only** - Set as a read only field that cannot be changed.
  - **Multi select** - Allow the user to choose more than one item from the list at a time.
  - **Buttons list** - Provides the field with buttons instead of checkboxes.
  - **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 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.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Date and Time Field

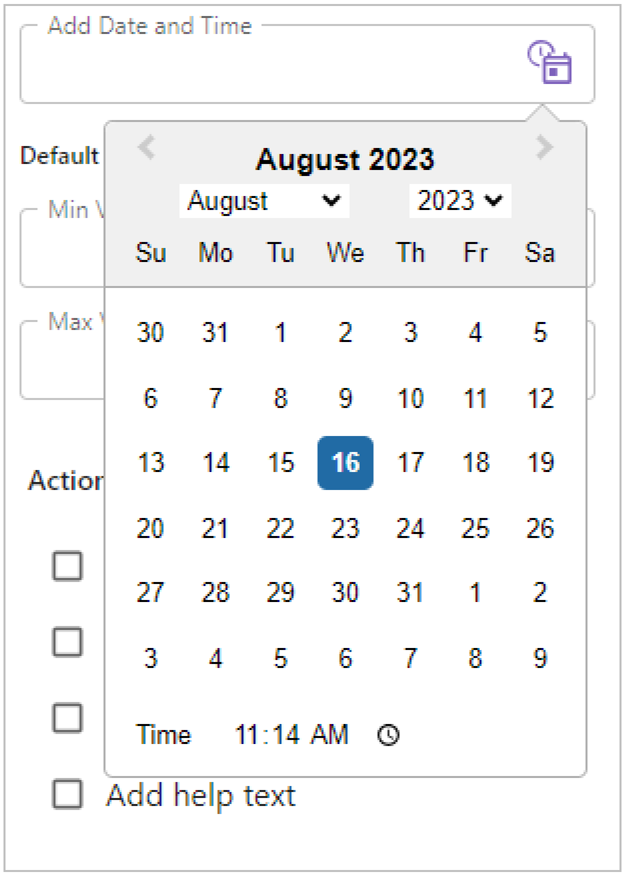


To add a field for the user to enter the date and/or time, drag and drop the **Date and Time** icon to the Form Builder Canvas area. This information will be associated with the file as metadata. Select the newly created field to customize its properties in the Field Properties panel on the right. You 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. Spaces are not allowed. All variable names in a 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}`).

- In the **Friendly Name** field, enter the label you want to appear above the Date and Time field. The friendly name will always be visible to users who access the form.
- From the **Return Format** drop-down list, choose the format to use.
- 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.

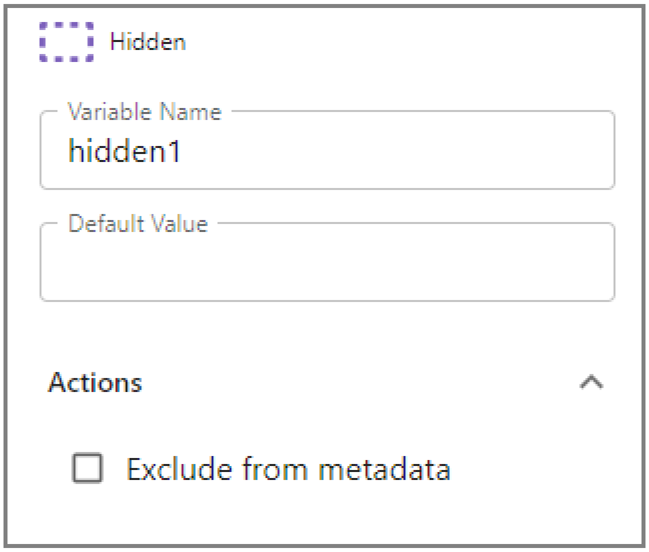


- If you check the **Default to now** box, the current date/time will be displayed.
- If you would like to specify a specific date and time, enter it in the **Add Date and Time** field.
- In the **Default Range Min Value** and **Max Value** fields, you can specify minimum and maximum values for the date or time, using the calendar icons to access calendar or time clock pop-ups. You will not be allowed to scan outside of the specified value range.
- In the **Actions** area, you can specify the following, based on which options you select:
  - **Required** - Set as a mandatory field. Required fields are marked with an asterisk (*).
  - **Read only** - Set as a read only field that cannot be changed.
  - **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 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.

When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Hidden Field



To add a hidden field to your form, drag and drop the Hidden icon to the Form Builder Canvas area. Hidden fields are used as temporary variables to store values that can be reused in the form. Select the newly created field to customize its properties in the Field Properties panel on the right. You can do the following:

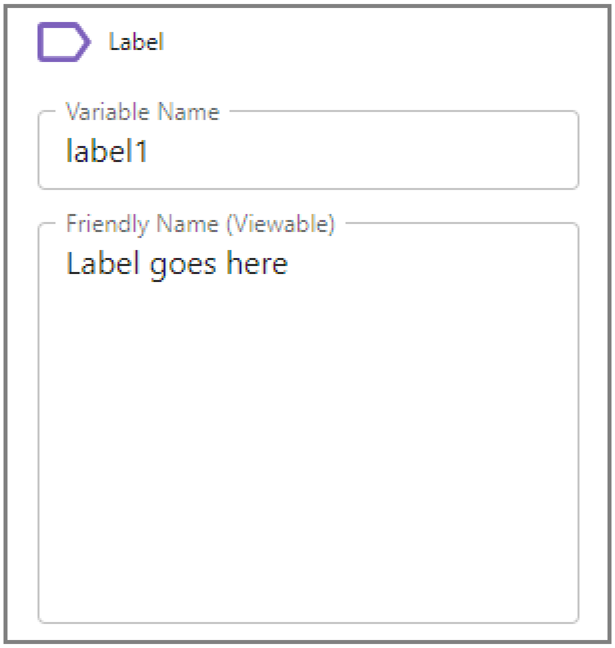
- In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users. Spaces are not allowed. All variable names in a form must be unique.

  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}`).

- In the **Default Value** field, specify the value that will appear in the field when the form first loads.
- In the **Actions** area, you can specify the following, based on which options you select:
  - **Exclude from metadata** - Do not include the variable as metadata associated with the document.

You will also have access to many additional **stylization options**.

Adding a Label



To add static text to the form, drag a **Label** icon onto your work area. Default text of “Label goes here” will appear. Select the newly created field to customize its properties in the Field Properties panel on the right. 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. Spaces are not allowed. All variable names in a form must be unique.

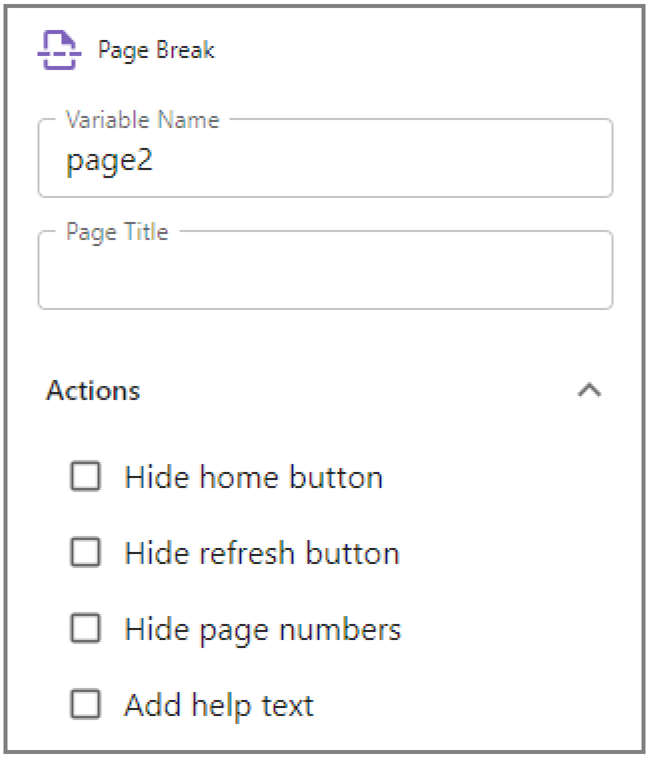
  This variable name can be referenced later by other nodes in the workflow or other fields using the following syntax: `{form:[name of variable]}` (e.g., if the variable name is ‘name,’ the variable name could be referenced in other nodes using this syntax `{form:name}`).

- In the **Friendly Name** field, enter the label you want to appear in the Label field. The friendly name will always be visible to users who access the form.

You will also have access to many additional **stylization options**.

Adding a Page Break

Standard Forms Only



To add a new page to the form, drag a Page Break icon onto your work area.

You can do the following to modify a Page Break:

- 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. Spaces are not allowed. All variable names in a 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}`).

- In the **Page title** field, enter the text that will appear at the top of the screen.
- In the **Actions** area, you can specify the following, based on which options you select:
  - **Hide back button** - Do not display the icon to return to the previous page.
  - **Hide next button** - Do not display the icon to advance to the next page.
  - **Hide scan button** - Do not display the icon to scan files.
  - **Hide home button** - Do not display the home icon on this screen.
  - **Hide return button** - Do not display the icon that would return the user to the main menu.
  - **Hide page numbers** - Do not display the page number on this screen.

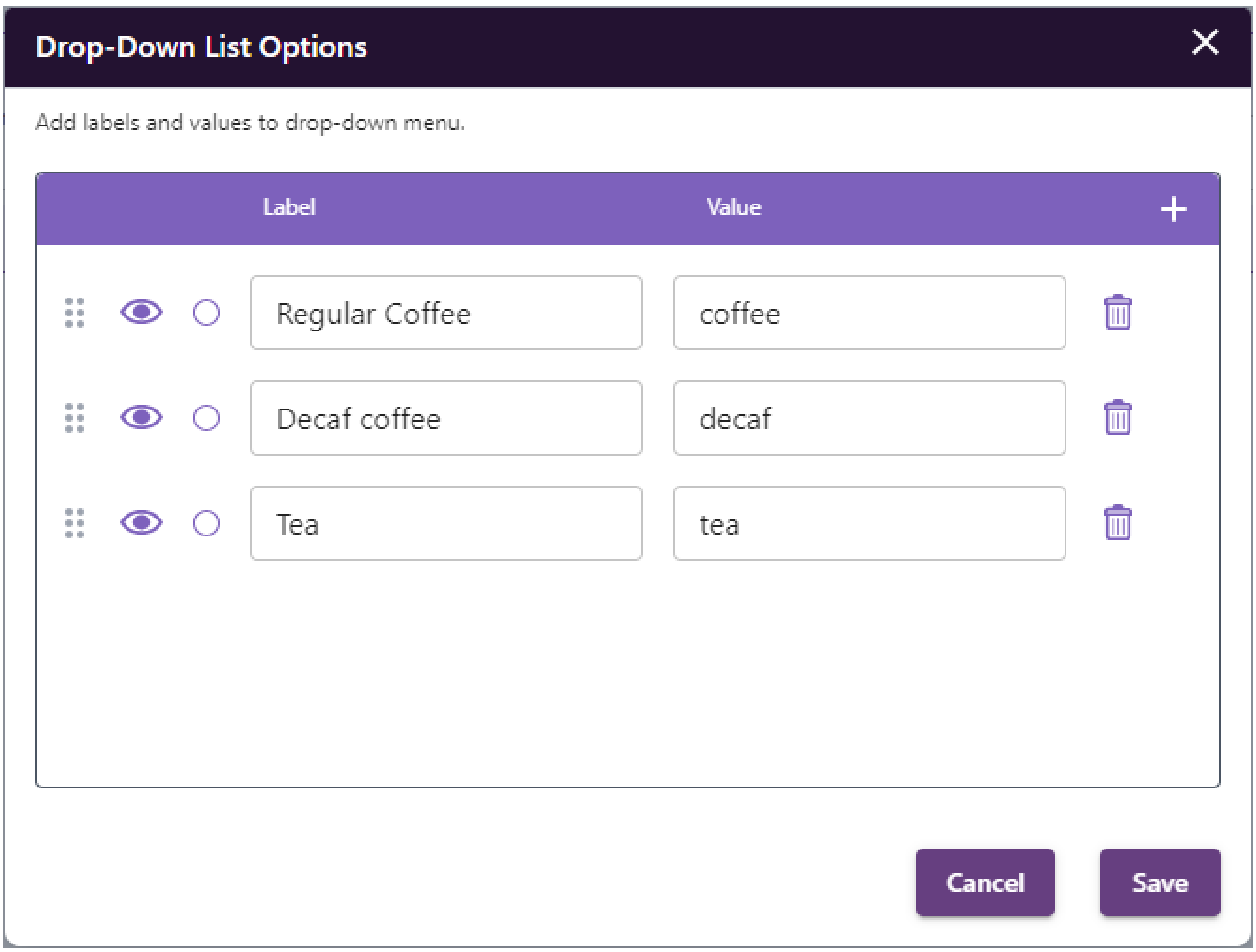
- **Add help text** - Supply help information about the field. This help information will be accessed when the user taps a question mark icon next to the field. When this option is enabled, an “Edit help text” box will appear on which you can enter text.

Arranging Fields

When creating a Standard form, you may arrange form fields by dragging and dropping them into the canvas area, using the six dots icon on the left side of the field. Fields may only be positioned above or below previously-added fields.

Manually Adding List Items

When creating an Advanced form, list items can be added by clicking the edit list button in the **Checkmark**, **Drop-Down**, **Button List**, or **Radio Button** fields Properties Panels. This will open a window where you can add list options with user-facing names and associated metadata values.



Add as many options as you want by selecting the **+** button. Each list item has the following options:

- **Drag to reorder** - Use the six dots icon to click and drag a list item to place it in a different position.
- **Show/Hide** - Use the eye icon to show or hide the item from the list.
- **Select to set as default value** - Select to have the option appear as selected by default in the form.
- **Label** - The user-facing name associated with the list item.
- **Value** - The metadata value associated with the list item.
- **Delete** - Remove the list item.

Note: Options in this window may display differently depending on options selected in the Properties Panel. For example, when the Multi-Select option is selected, options in this window appear with checkboxes, which allow for multiple selections. When the Multi-Select option is not selected, options appear with radio buttons, which only allow for a single selection. This does not affect how the options are displayed when the form is accessed.

Form Builder Canvas

The Form Builder Canvas serves as a creative space where users can construct their forms visually, with drag-and-drop functionality for effortless customization. Standard Index Fields can be dragged and dropped onto the Canvas, where they will stay until moved.

Meanwhile, the **Error List** offers instant feedback, guiding users to rectify any validation issues promptly.

When building a Standard form, there are three buttons in the upper-right corner that are not clickable. These indicate the Home, Refresh, and Next Page buttons that typically appear on the MFP Panel.

Adding Fields or Tools to the Work Area

You can begin adding fields to your form by dragging-and-dropping the icons listed on the left hand side of the window into the Form Builder’s work area.

Duplicating Fields or Tools

Once in the work area, each index field includes a **Duplicate** button above it. To duplicate an index field from your form, select that **Create a duplicate field** button.

Deleting Fields or Tools

Once in the work area, each index field includes a **Delete** button above it once it has been added to the canvas. To delete an index field from your form, select that **Delete** button.

Moving Fields or Tools Around the Work Area

You can rearrange the order of the index fields by dragging and dropping the fields on the work area. To move a field, do the following:

1. Hover over the field you would like to move.
2. Click the six dots in the upper-left corner.
3. Drag the field to the desired position.

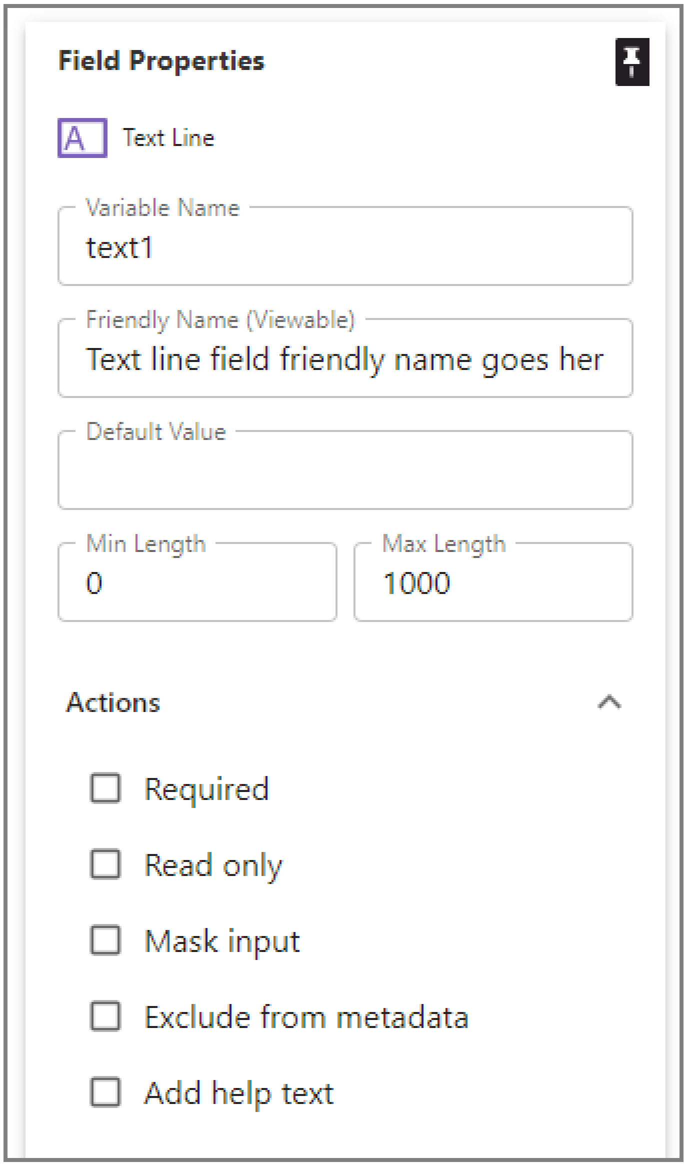
Configuring Fields or Tools

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

Error List

If you have attempted to **Validate** a form that is not configured correctly, the Error List area will appear in the middle of the screen, below the Canvas. The Error List contains additional information about each problem that is preventing the form from validating properly.

Field Properties Panel



On the right-hand side of the screen, the Field Properties Panel displays the editable properties of the selected Standard Index Fields. This is where you can edit the field properties described in the **Standard Index Fields** and **Tools** sections above. This area can be pinned/unpinned by clicking the pin icon in the upper-right hand corner.

Sample Forms

The Form Builder comes with several pre-configured forms that you can use in workflows or use as starting points to build more complex forms. Whether used directly or as inspiration for more complex designs, these samples enhance productivity and streamline workflows. Sample forms include:

- Custom Email - This sample includes fields that allows users to enter information necessary to send the scanned document via email. The form contains the following fields:
  - Email Address - **Text Line field**

- CC - **Text Line field**
- BCC - **Text Line field**
- Subject - **Text Line field**
- Email Body - **Text Area field**
- Convert to PDF - **Checkmark field**

- Destination Selection - This sample allows users to select whether they would like documents saved to Dropbox, SharePoint Online, or OneDrive for Business. The form contains the following fields:
  - Storage Location - **Drop-down field**
- Email Drop-down - This sample allows users to select an email address they would like to email the scanned document to. The form contains the following fields:
  - Select an Email - **Drop-down field**

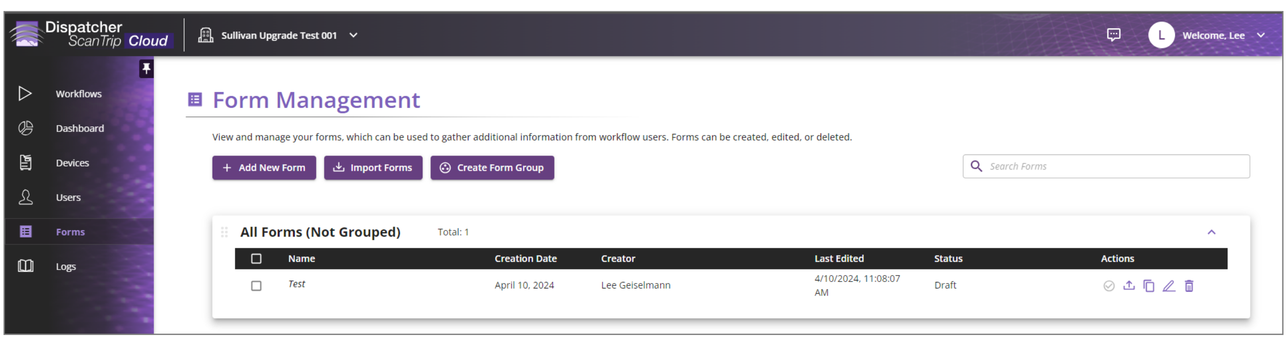
Form Management

Dispatcher ScanTrip Cloud includes Forms, which can be used in a form to achieve a variety of outcomes. Tenant Admins have the ability to create, edit, share, and delete forms.

Form Management Home Page

To access the Form Management page, do the following:

1. On the left side, select the **Forms** tab. This will bring you to the Form Management home page.



At the top of the screen are three buttons: **Add New Form**, **Import Forms**, and **Create Form Group** and a **Search** bar.

Creating a New Form

To create a new form, click the **Add New Form** button near the top of the page. This will open the **Form Builder**.

Importing Forms

To import one or more forms from a file directory, click the **Import Forms** button. This will open a Windows style file browser you can use to find the .zip file containing the form or forms you would like to import.

Notes:

- By default, downloaded forms import into “All Forms (Not Grouped)” group.
- If an imported form already exists in the “All Forms (Not Grouped)” group, the form name will be appended with “Copy” (similar to Windows naming conventions). If a form already exists with “Copy” in the name, the form name will be appended with a unique number (e.g. “Copy (2)”).

Form Groups

Tenant Admins can arrange forms into form groups to make form management easier. Form groups can contain any number of forms.

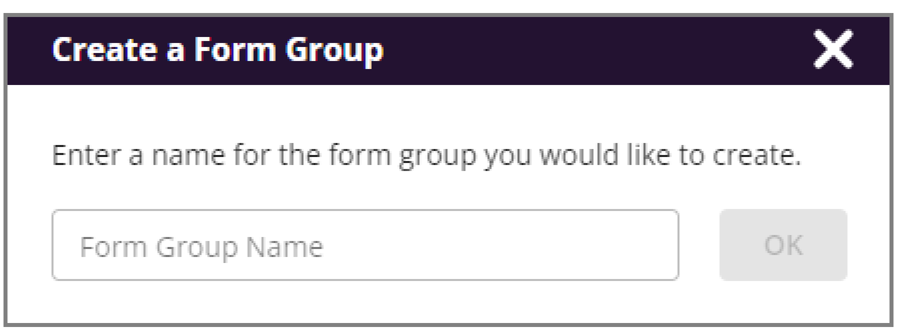
Note: Forms can belong to only one group at a time.

Create a Form Group

Tenant admins can create form groups for easy viewing and categorization.

To create a new form group, do the following:

1. Click on the **Create form group** button at the top of the Form Management home page.

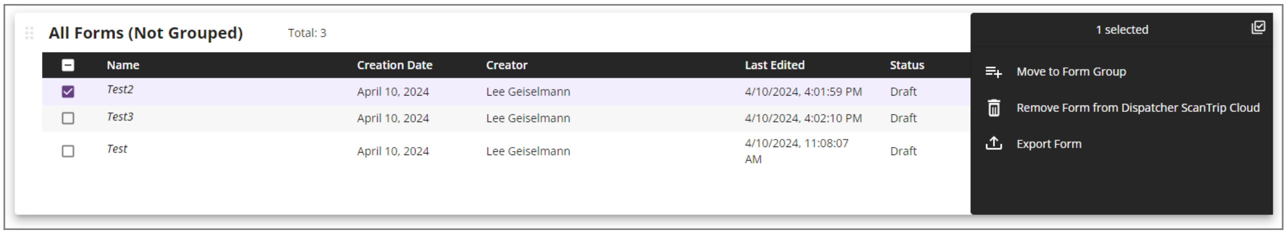


2. Enter a name for the form group, then click **OK**.

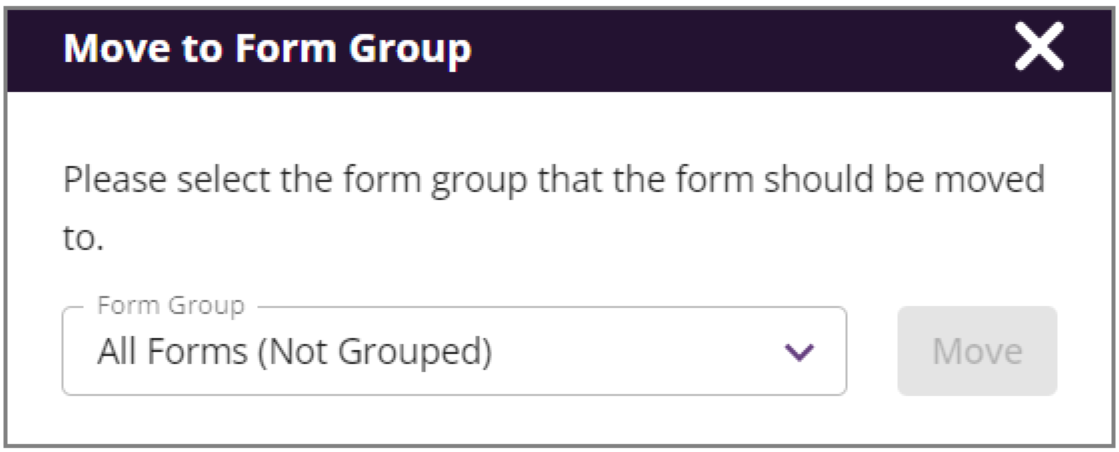
Adding Forms to a Form Group

To add a form to a form group, do the following:

1. Click in the checkbox on the left side of each form you wish to add to a specific group. This automatically opens a menu on the right with actions. Click **Move to Form Group**.



2. This will open a window that allows you to select which group to add the selected forms to, as in the following illustration:



Note: This process can also be used to remove a form from a form group. In the drop-down menu, select **All Forms (Not Grouped)**.

Edit a Form Group

Form groups can be edited in several different ways.

Sort Forms Within a Group

Tenant Admins can adjust the view of their form groups in several ways. The default organization is alphanumerically by Form Name. To change the order, do the following:

1. Click the arrow next to the column you would like to sort by.

2. To sort in the reverse order, click the arrow again.

Edit the Form Group Name

To edit the form group Name, do the following:

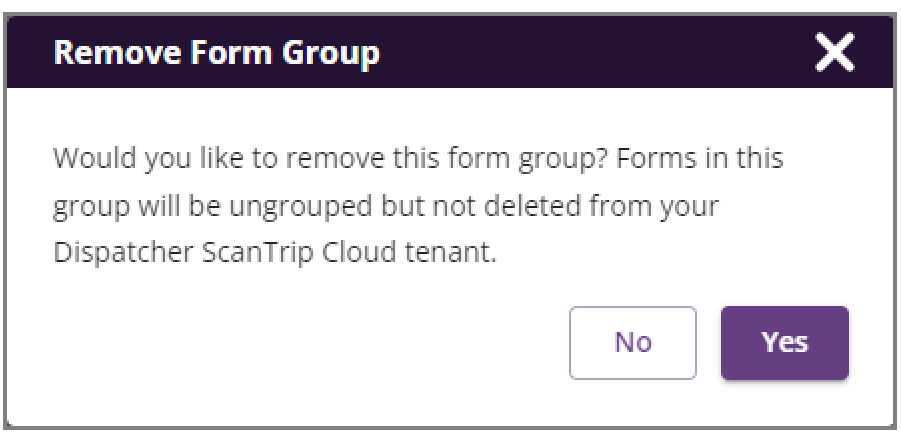
1. Click in the form group Name area.

2. Type the new form group Name.
3. Press the Enter/Return key; the name will be saved automatically.

Delete a Form Group

To delete a form group, do the following:

1. In the top menu bar of the group you wish to delete, click the **Trash Can** button next to the Group Name.
2. This will open a small window asking you to confirm your action. To continue deleting the group, click the **Yes** button.



Search

In the upper-right hand corner is a search field that allows you to filter forms. To use the **Search Forms** feature, do the following:

1. Click within the **Search Forms** field.
2. Enter your search criteria. The results are updated immediately based on the entered criteria.

Note: The **Search Forms** feature searches the following fields: Name and Creation Date.

Forms List

Below the row of buttons at the top of the page is a list of available forms. Forms are organized in user-defined groups. Newly created forms will be placed in a default group titled “All Forms - Not Grouped.”

Individual forms within the list are displayed with relevant information, as well as available actions. Information includes:

- **Name** - The friendly name given to the form.
- **Creation Date** - The date the form was originally created on. Note that by default, this date is displayed as Month-DD-YYYY.
- **Creator** - The user who originally created the form.
- **Last Edited** - The most recent date that the form’s state was updated. This includes creation, edits, publishing/unpublishing, etc.
- **Status** - The status column displays the form’s current state: published, unpublished, or draft.

Actions you can perform on the forms include:

Icon	Name	Description
/	**Publish/Unpublish**	Publish a form to allow it to be viewable and selectable in the **Form Selector** node
	Export	Downloads a copy of the form as a .zip file. This can be imported using the **Import Forms** button, described above.
	Clone	Creates a duplicate of the form in the same form group
	Edit	Modify the selected form
	Delete	Delete the selected form

Important!

- When duplicating or importing a form, you must ensure that each metadata key within all the forms is unique. If there are two or more identical metadata keys used within a workflow, each will override the previous one; only the last value will be saved.

Selecting Multiple Forms

To select more than one form, click in the checkbox on the left-hand side of a form.

Using the Form Context Menu (With Multiple Forms)

Selecting one or more forms brings up a context menu on the right-hand side of that form group.

Actions you can perform on the forms include:

- Move to Form Group
- Remove Forms from Dispatcher ScanTrip Cloud
- Export Form

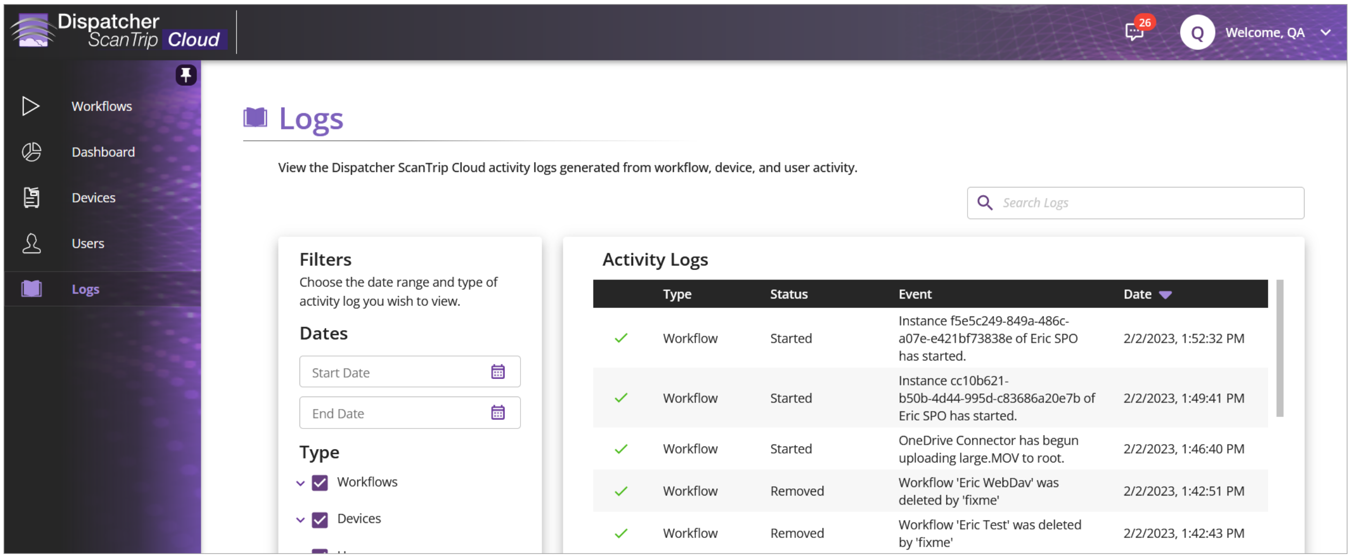
Logs

Dispatcher ScanTrip Cloud automatically logs actions involving workflows, devices, and users which can be used for analytics, reporting, and troubleshooting.

Log Viewer

Activity Log files are recorded every time a workflow’s, device’s, or user’s status changes.

To access the Log Viewer, click the **Logs** tab in the left-hand menu. The Log Viewer will look similar to the following illustration:



Activity Logs

To view logs, do the following:

1. Select a Log Section by using the drop-down menu. Options include:
   - Devices
   - Users
   - Workflows
2. Select an individual option from the second drop-down menu. For example, if you selected “Workflows” from the first drop-down menu, the options presented in the second drop-down menu will be the available workflows.
3. Select a date or date range to view the logs for. Options include:
   - Today
   - Yesterday
   - Last 7 Days
   - Last 30 Days
   - Custom

If you select **Custom**, you will then have the option of selecting a **Start Date** and **End Date**.

4. You can further Customize your Log Viewer results by selecting an option from the Customize menu. These will filter the various logs by type, including:
   - Information
   - Warning

- Error
- Critical
- Debug

Generated Logs

The individual logs are displayed on the right-hand side of the Logs page . Each log includes the following information:

Column	Description
Date	The exact date and time the event was logged
Type	Which type of event Dispatcher ScanTrip Cloud logged: Information, Warning, Error, Critical, or Debug. Each type is shown as an icon.
Error Code	The error code associated with the log. This column is hidden by default, but can be displayed by using the **Refine** filter options.
Details	A short description of exactly what occurred within Dispatcher ScanTrip Cloud

Logs can also be refined by selecting the **Refine icon** ( ). Tenant Admins can show or hide a column in the displayed logs by selecting or deselecting one of the options from the Refine drop-down menu.

Administrators can adjust the view of their Activity Logs in several ways. The default organization is in reverse chronological order, with the most recent event at the top. To change the order, do the following:

1. Click the arrow next to the column you would like to sort by.

   Note: Columns are automatically sorted alphanumerically.

2. To sort in reverse alphanumeric order, click the arrow again.

Logs can also be searched, using the **Search Logs** field in the upper-right corner.

Logs can be Exported by selecting the **Export** button at the top of the page. Note that this option is only available after Logs have been generated. Logs can be generated in the following formats:

- CSV
- TXT

Using Logs

Log information is vital for monitoring systems and troubleshooting issues that arise. A typical user will not need access to logs. However, in the event that something unexpected happens within the tenant, logs can be helpful for diagnosing the problem so it can be fixed. If a tenant admin cannot fix the issue, attaching the relevant logs can be helpful when submitting **Customer Feedback**.

Roles

Dispatcher ScanTrip Cloud tenants include member roles, which tenant admins use to control members' access to the tenant. Each role includes various **permissions**. These permissions determine members' ability to view, edit, and create within the tenant.

Note: To access and edit this page, you must be a **tenant admin**.

All tenant members must be assigned at least one role. The default user role enables members to sign in to the tenant. Other roles include permissions to access and edit the various pages in the portal. Roles can be assigned to any of the following:

- An invitee to the tenant.
- A tenant member group.
- A tenant member.

Dispatcher ScanTrip Cloud Roles and Permissions

Dispatcher ScanTrip Cloud includes the roles listed below, each with a different set of permissions within the tenant. Privileged tenant members can select their own role or assign a role to tenant members.

- **Tenant Admin** - Performs the day-to-day administrative tasks for the tenant.
- **Tenant Super Admin (System Role)** - System roles are not editable. All tenants must have at least one Tenant Super Admin.
- **Tenant User** - For members who use workflows but do not require any admin permissions.

Tenant Managers

A tenant is not not required to have a **tenant manager**, and tenant managers are not members of the tenants they manage. A tenant manager might manage multiple tenants in a large corporation, or be a Dispatcher Stratus dealer who has one or more clients. A tenant manager can be assigned as part of a tenant's initial configuration, or can be added or reassigned later by a privileged tenant member such as a tenant admin.

Tenant managers have access to the Dispatcher Stratus Manager area, where they can view information on the tenants they manage, including the Tenant Manager Dashboard page and the Tenant Manager Reports page. A tenant manager cannot access the tenants they manage unless they are granted the **Tenant Manager & Admin** role in a tenant, which enables them to perform both roles for the tenant.

Overview of the Tenant Admin Role

The Tenant Admin role is designed for an in-company manager who oversees and uses the tenancy on a day-to-day basis. There are two types: Tenant Super Admin and Tenant Admin. The first tenant admin is always given the Tenant Super Admin role, which also gives them access to view and edit **Tenant Settings**. Subsequent admins can be invited as either Tenant Super Admins or Tenant Admins (Tenant Admins have access to view and edit everything except Tenant Settings). While the first tenant admin can be invited by a tenant manager, other tenant admins must be invited to the role by another tenant admin. Tenant admins can do the following:

- Configure and view their tenant, including:
    - Assigning a name to their tenant
    - Assigning a unique URL to their tenant
    - Selecting the region where they want their data to be stored (during initial setup)
    - Selecting the tenant authentication method (during initial setup)
- Access all pertinent administrative functions in their tenant, including the ability to:
    - Create, configure, and manage workflows
    - Add and manage devices
    - Invite additional tenant admins
    - Invite additional users
    - Modify the tenant’s subscription
    - View reports and analytics

Tenant Admins also gains access to a database of sample workflows to help with the start-up process. These workflows can be shared, edited, deleted, etc., and are also available for download on the **SEC Website**.

Important! A tenant requires at least one Tenant Super Admin at all times.

Overview of the Tenant Manager Role

The Tenant Manager role is designed for people such as dealer representatives and departmental managers who will not have much, if any, day-to-day oversight or use of the tenancy. The Tenant Manager is the only role with the capability to view aggregate data for multiple tenancies at the same time. Tenant managers can do the following:

- View all configured and unconfigured licenses (licenses that have been purchased and redeemed but have not completed setup) for which you are a tenant manager
- Activate a purchased license to begin tenant configuration

- View the status of all tenants (configured and unconfigured)
- Invite the first **tenant admin**
- Resend invitations for the first tenant admin
- Cancel invitations for the first tenant admin
- Enter and maintain tenant contact information
- View analytics and contact information per tenant
- View analytics across tenants, including information about device usage, active workflows, and more

Notes:

- Tenancies do not need a tenant manager to function.
- For trial licenses, the Tenant Manager role is automatically filled by a Konica Minolta representative.

Overview of the Tenant Manager & Admin Role

The Tenant Manager & Admin role has the combined permissions of both the Tenant Manager and Tenant Super Admin roles. It is designed to provide single persons with the ability to both setup a tenancy and perform the day-to-day oversight and usage of the tenancy.

Overview of the Tenant User Role

The Tenant User role is designed for tenant members who use **workflows** but do not require access to the administrative aspects of the tenant.

Role Permissions at a Glance

Permission	Tenant Admin	Tenant Manager	Tenant Manager & Admin	User
View analytics and contact information for a single tenant	✓		✓	
View and edit their tenant's settings	✓		✓	
Assign or edit the tenant's name	✓		✓	
Assign or edit the tenant's unique URL	✓		✓	
Select the region where the tenant's data will be stored	✓		✓	
Select the authentication method for the tenant	✓		✓	
Create, configure, and manage workflows	✓		✓	✓*
Input and manage devices	✓		✓	
Invite and manage invitations for tenant admins	✓	✓**	✓	
Invite and manage invitations for users	✓		✓	
View in-depth reports and analytics about a single tenancy	✓		✓	
View all configured and unconfigured licenses for which you are a tenant manager		✓	✓	
Activate a single license		✓	✓	
View the status of all tenants (configured and unconfigured)		✓	✓	
Enter and maintain tenant contact information	✓		✓	
View analytics across multiple tenants		✓	✓	

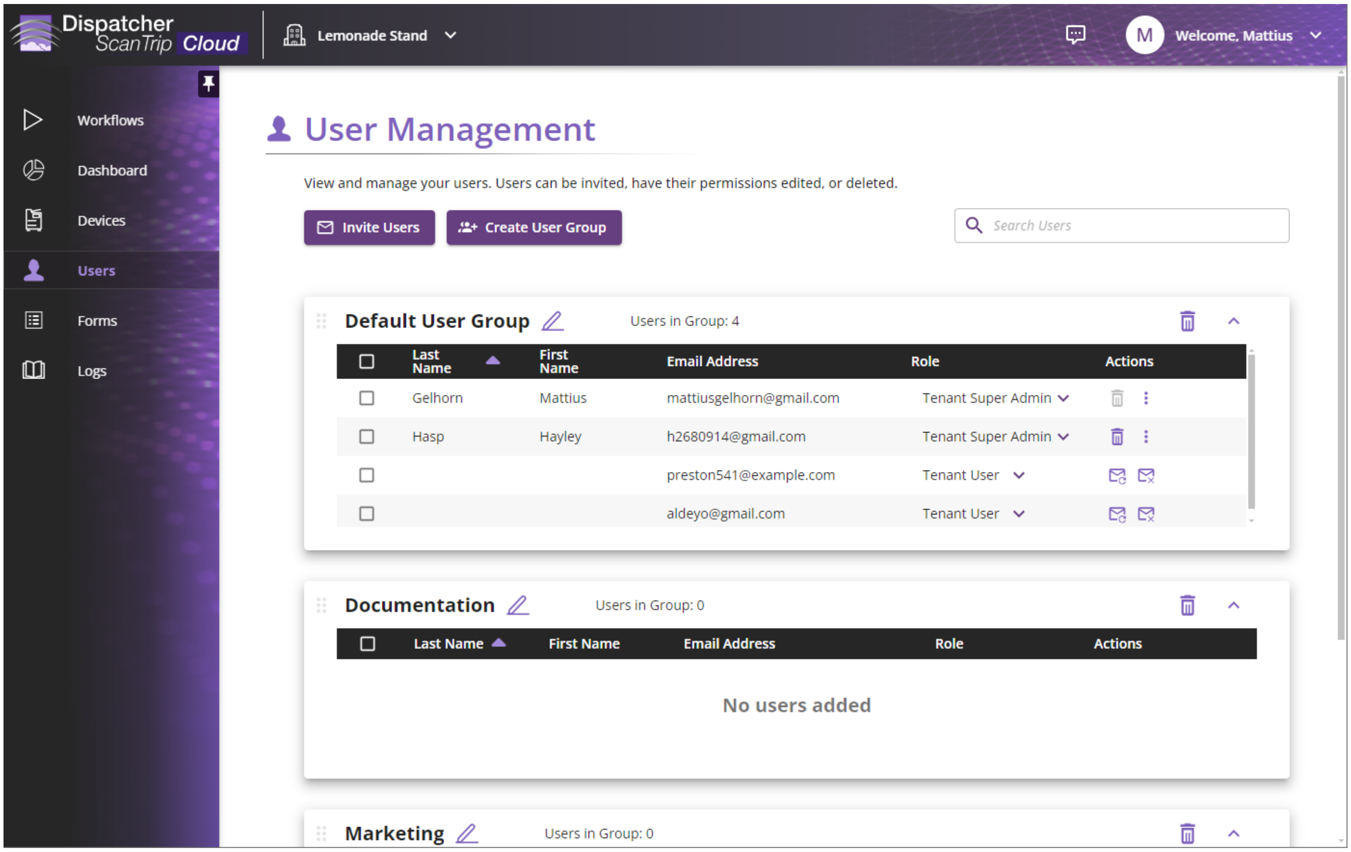
* Users can access workflows that are shared with them but cannot create new workflows.

** Tenant managers can invite and manage invitations only for the first tenant admin. Other tenant admins must be invited by another tenant admin.

User Management

The User Management page provides powerful user management features that enable you to manage your tenant members and control their access to the various portal pages and their functions. This page lists all members of the tenant (including pending members), organized by member groups, and provides the tools you need to delegate portal access where it is needed, and block access where it is not.

The following illustration shows the User Management page for the Lemonade Stand tenant, displaying the Default User Group, several **custom user group** tables, and the members they contain:



Access to this page is restricted to tenant admins . Thus, tenant members cannot modify roles and permissions, including their own, without proper access.

Managing Tenant Members

Managing a tenant’s members involves the following general tasks:

1. **Inviting people** to join the tenant.
2. **Creating user groups** in which to organize your tenant members, for example, a group of members who need access to the same workflows.
3. **Assigning roles to users** that provide the access they need to perform their jobs and block them from other areas of the portal.

4. Managing the tenant membership thereafter, including reassigning tenant member roles as necessary.

All tenant members must belong to at least one tenant group and be assigned at least one access role. Each member's initial role is assigned as part of their invitation to the tenant. Thereafter, all user management is performed on the User Management page.

Users and User Groups

The User Management page lists all members of the tenant, organized into **user groups** (also called member groups). A tenant must always contain at least one member and at least one user group to contain that member. Dispatcher ScanTrip Cloud provides the Default user group, to which the first tenant member is initially assigned. Thereafter, tenant admins can invite new members and create custom user groups in which to organize the tenancy.

User groups can help to track your tenant members and control their access to the portal. For example, you can create groups to organize your tenancy by any of the following:

- Department
- Workflows needed for daily tasks
- Security or seniority level

User Group Tables

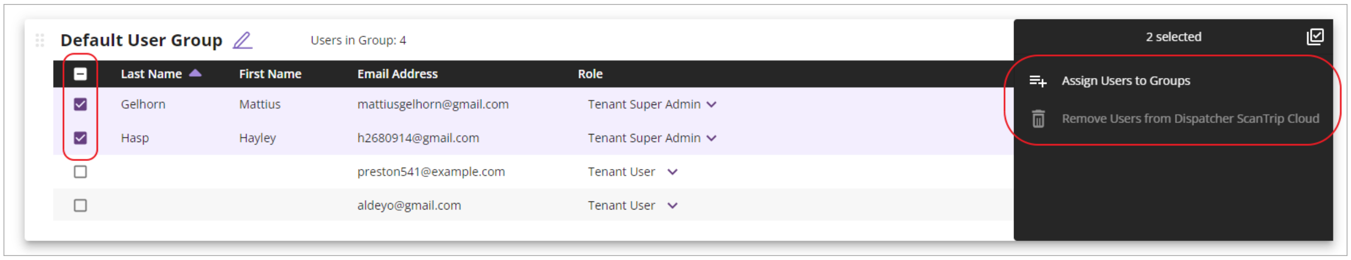
Each member group displays as a table on the User Management page. Initially, your tenant includes only a default group. Once you create your own member groups, their tables will appear on the page and you can assign members to those groups.

Each member group table contains the following columns of information:

- Last name and first name - The names associated with the member's tenant account. These names do not appear for pending members until they accept their invitation.
- Email address - The email address associated with the member's tenant account.
- Role - The member's role. All members must have at least one role.
    - To change a role or assign another role, select the drop-down menu, then select one or more roles from the User Roles window.
    - For pending members, their roles are also pending their acceptance of the invitation. A tenant admin assigns a role as part of the invitation, but privileged members can change that role or assign other roles to the pending member.
    - If you edit a member's role assignment, the most recent selection displays in the column.

Selection Boxes

The Selection boxes on the left side of the table access the following actions. To select all members in a table, select the box on the Table header bar. If you select multiple members, only the actions available to all selected members are active, as shown below:



- Assign Users to Groups - Accesses the **Assign Users to Groups** window, where you can select the groups you want to assign to the selected users.
- Remove Users from Dispatcher ScanTrip Cloud - Accesses the **Remove User** window, where you can remove the selected users from the tenant.

Note: The dash in the selection box on the column header row indicates only a portion of the group's members are currently selected.

Actions Column

In addition to columns of information for group members, the Actions column displays icons for the actions available for each group member. Not all actions are available to all members, depending on their licenses, roles, and permissions within the tenant. The following action icons are available:

- Share - Displays the Shared Workflows window where you can view a list of workflows that have been shared with a user. If you have the correct **permission**, you can modify the list of shared workflows. If no workflows have been shared with the user, this icon does not appear.
- Trash - **Remove a User** from the tenant.
- Ellipsis - Displays a menu with the following additional action:
  - **Block / Unblock User** - Accesses the Block User window.

Note: For pending members, envelope icons appear in the Actions column: 

Modifying the Display of a Member Group Table

Member Group tables have the following display options:

- Sort column - Select the column header. The downward-facing chevron sorts in ascending order. The upward-facing chevron sorts in descending order.
- Collapse/Expand table - Each table includes a collapse/expand option on the right end of the Table header bar.

- Scroll bar - Tables with many members have a scroll bar providing access to all members in the table.

Inviting People to Join Your Tenant

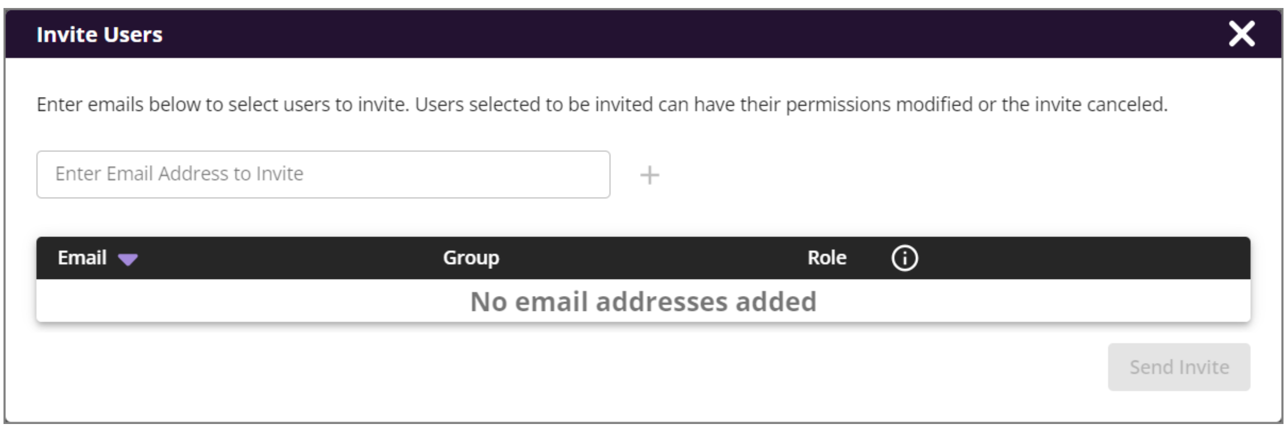
Privileged users can send an email invitation to any valid email address. The email contains a link to Dispatcher ScanTrip Cloud , where the invitee can accept or reject the invitation.

Note: If “MarketPlace” is the **authentication method** for your tenant, then joining a tenant requires a MarketPlace account. Invitees with no MarketPlace account are directed to a page where they can create one, after which the process continues.

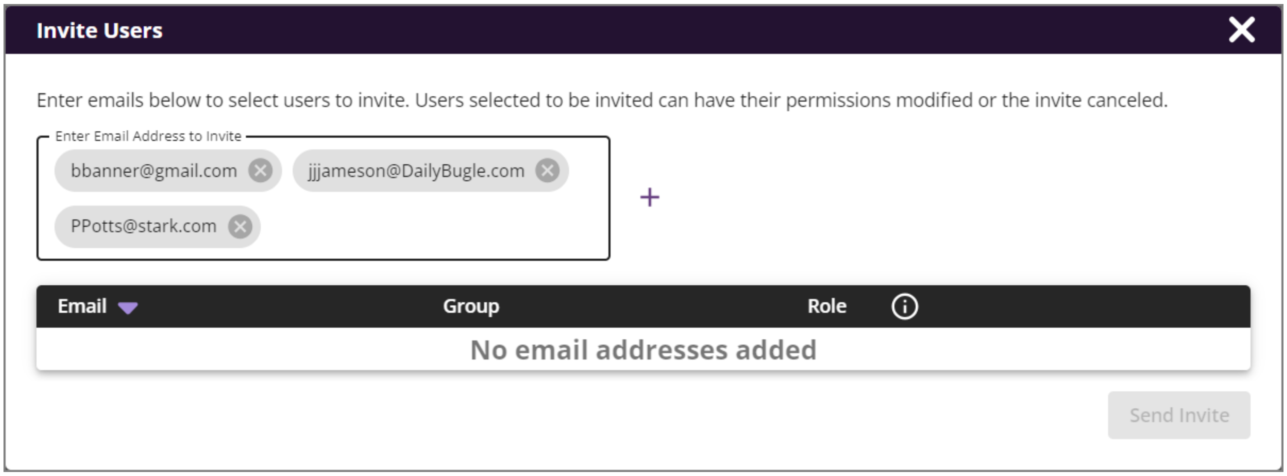
When creating an invitation, you specify a user group and an initial role for the invitee. Upon sending the invitation, the invitee is assigned to the specified user group with a status of Pending. Once the invitation is accepted, the status changes to Active, and the new member assumes their initial role. Privileged users can then modify the member’s role, and/or assign them to a custom member group (if any exist in your tenant).

To invite a new member, do the following:

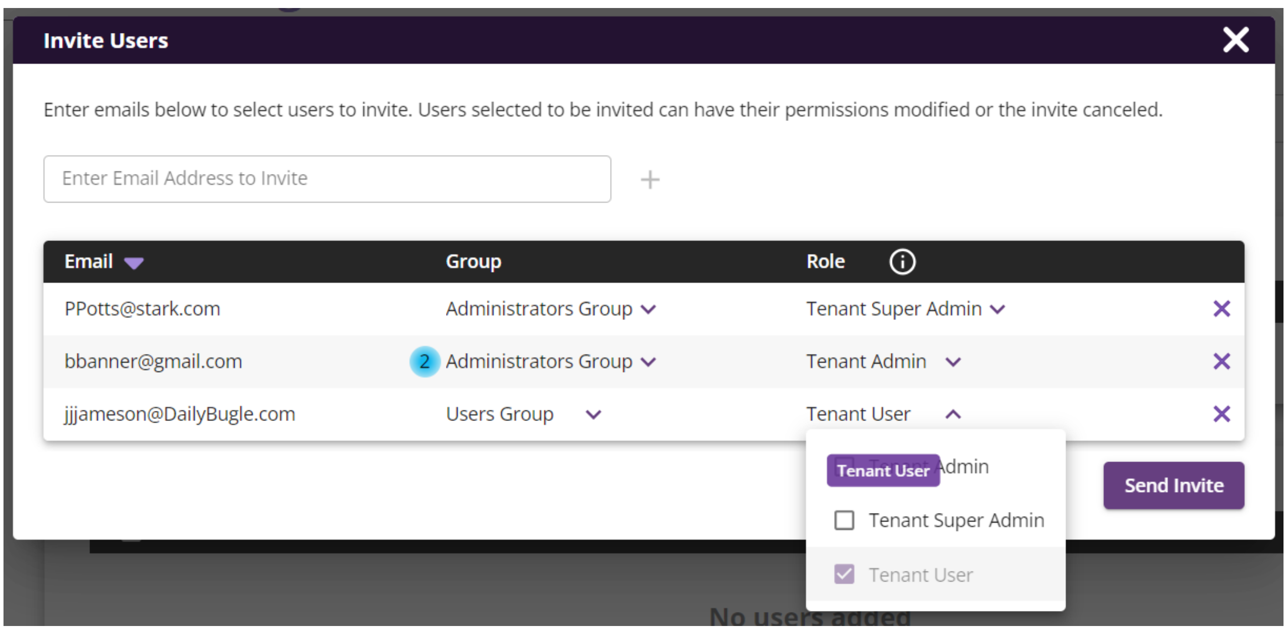
1. Select **Invite Users**. The Invite Users window appears:



2. Enter a valid email address, then select **+**. The address appears in the Recipient table below, and the **Send Invite** button activates.
3. To send additional email invitations, repeat step 2. You can also add multiple email addresses to the field by separating them with a space or comma.



4. Select a user group and role for each user. A number in the column indicates multiple selections for the user.

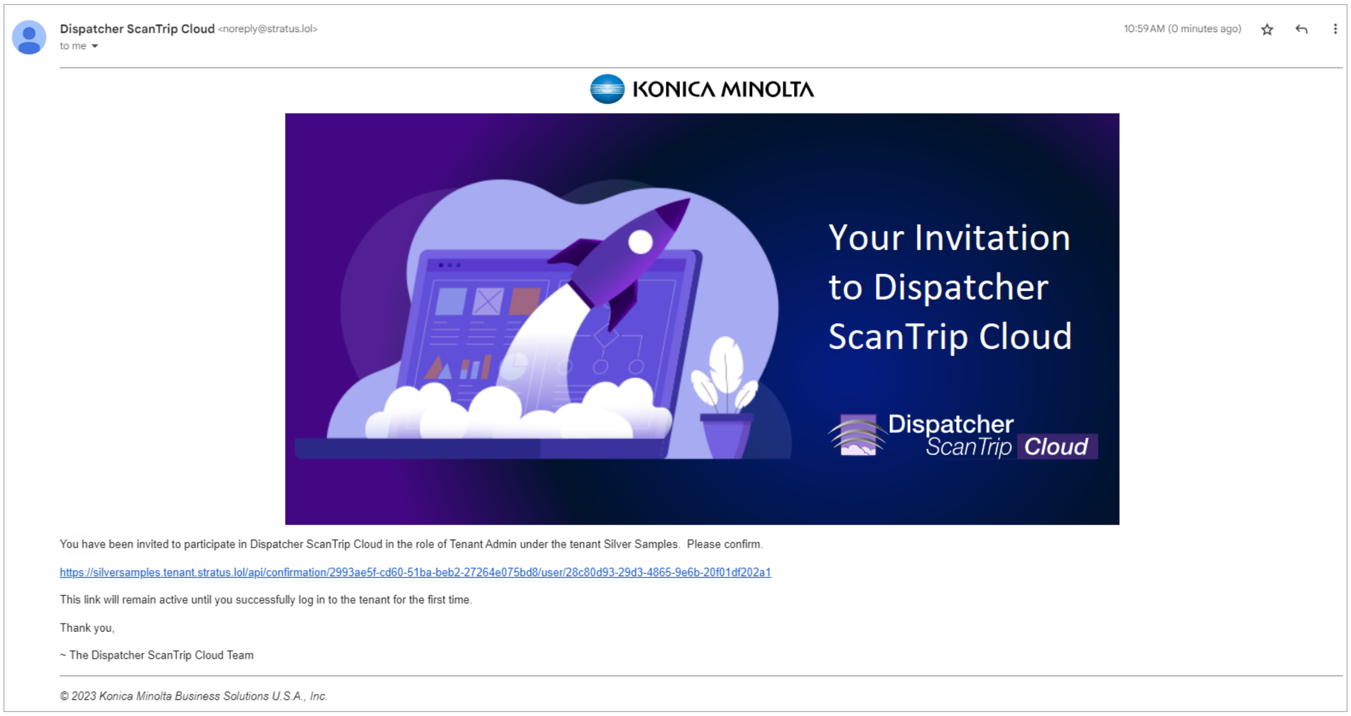


Note: Tenant invitations can only grant permissions at the same level or lower than the permissions held by the user sending the invite. For example, a tenant admin cannot invite a super admin; only a super admin can invite another super admin.

5. When done, select **Send Invite**. You return to the User Management page, where the group's tables will update to display the new, pending tenant members.

   Note: You can adjust the roles associated with an invitation while it is still pending. Access the User Roles window for the pending member. You can also cancel a pending invitation. Select the **Cancel Invite** icon for the pending member.

The following illustration shows a sample of an email invitation:



Accepted Invitations

After accepting an invitation, the new member can sign in to the tenant. You can view them and their assigned role on the User Management page.

Resending Invitations

To resend a user invitation, for example, if it is deleted or lost, do the following:

1. In the Actions column, select the **Resend Invite** icon associated with the pending member. The Resend Invite window appears.
2. To resend the invitation, select **Yes**. Otherwise, select **No**.

Canceling Invitations

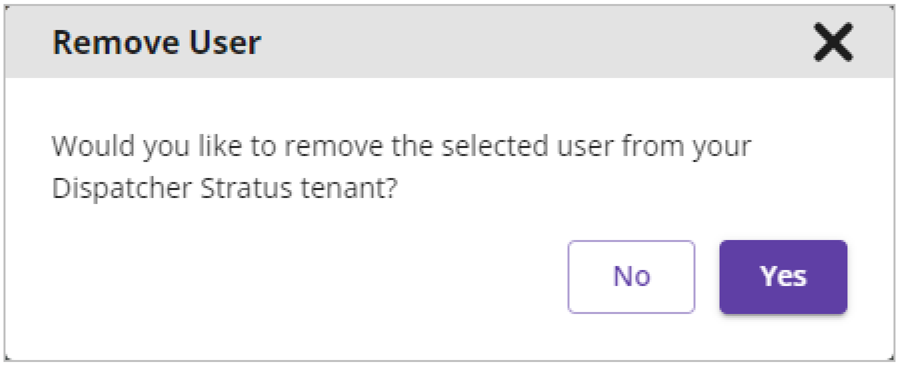
To cancel a user invitation that has not yet been accepted, do the following:

1. In the Actions column, select the **Cancel Invite** icon associated with the pending member. The Cancel Invite window appears.
2. To cancel the invitation, select **Yes**. The pending member remains, but the invitation no longer grants access to the tenant. You can send another invitation, or remove the pending member from the tenant by selecting their associated box and selecting Remove User from the menu that appears.

Removing Users

Privileged tenant members can remove any member from the tenant. Do the following:

1. In the Actions column, select the **Remove User** icon associated with the tenant member. The Remove User window appears:



2. To remove the user, select **Yes**. Otherwise, select **No**.

Note: If you attempt to remove a user who is the owner of one or more workflows that have not been shared with any other tenant members, a warning message will appear in the Remove User window indicating that the workflows will no longer have an owner and thus be inaccessible.

Blocking and Unblocking Users

You can temporarily deactivate a tenant member's account without losing any of their associated data such as workflows and logs. For blocked users, you cannot share workflows, but you can:

- Unshare workflows.
- Change their role.
- Modify their group assignments.
- Delete them from the tenant.

To block a member, do the following:

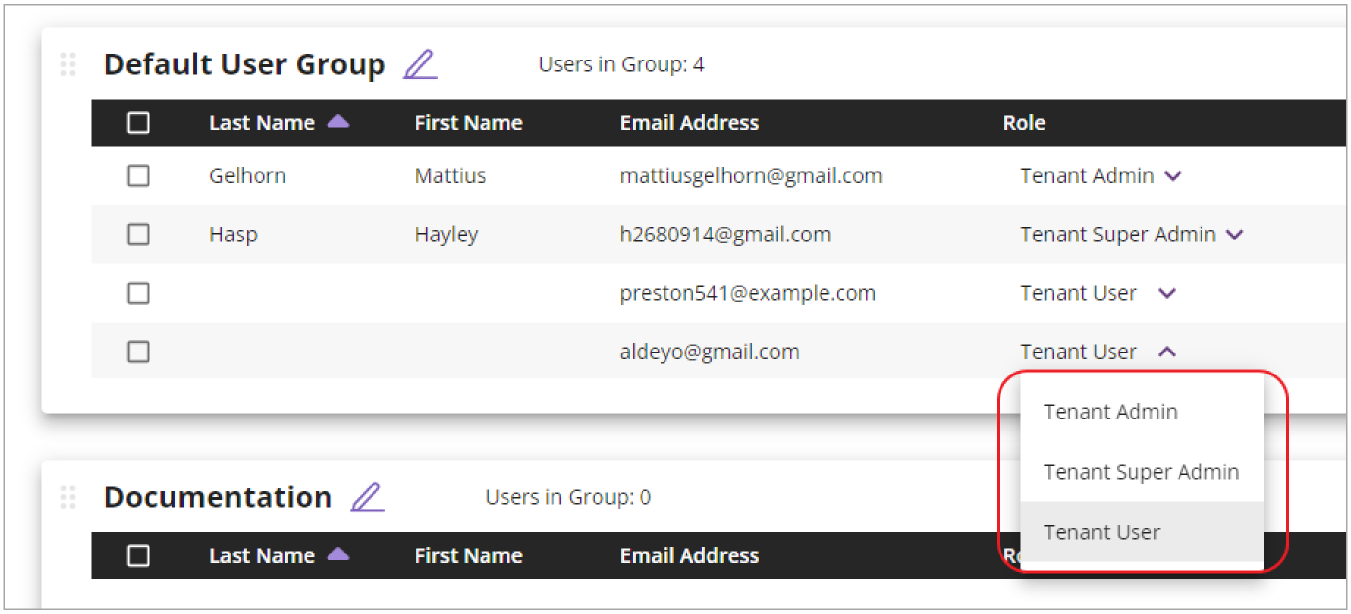
1. In the Actions column, select the **Block User** icon associated with the tenant member. The Block User window appears.
2. To block the user, select **Yes**. The Block User icon turns orange, indicating the member is blocked from the tenant.

An orange Block User icon indicates a blocked tenant member. To unblock the member user, do the following:

1. In the Actions column, select the **Unblock User** icon associated with the tenant member. The Unblock User window appears.
2. To unblock the user, select **Yes**. The Unblock User icon turns purple, indicating the member is no longer blocked from the tenant.

User Roles

Each tenant member must be assigned at least one user **role**. Privileged tenant members assign user roles via the User Management page. Select the dropdown in the user's Role column. The User Roles menu appears:



The User Roles menu displays all the user roles available in the tenant. The role assigned to the user is highlighted.

Managing User Groups

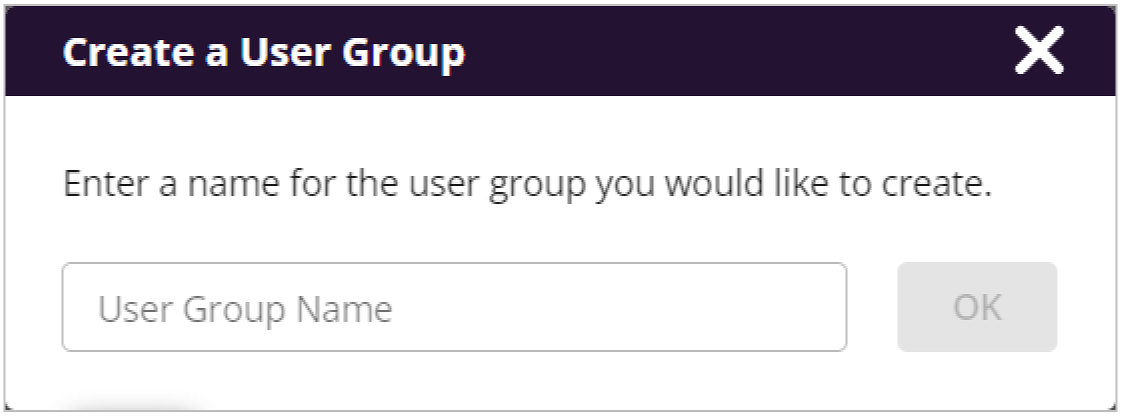
In addition to the Default User Group provided provided by Dispatcher Stratus, you can create custom member groups, helping you organize your tenant members and bulk-assign roles. For example, you can create a **user group** for members who access the same workflows. User groups can contain any number of members, and members can belong to multiple groups.

The following sections describe your options.

Creating a Custom User Group

To create a user group, do the following:

1. Select **Create User Group**. The Create New User Group window appears:



2. Enter a name for the group, then select **OK**. You return to the User Management page, where the new group appears in a table at the bottom of the page.

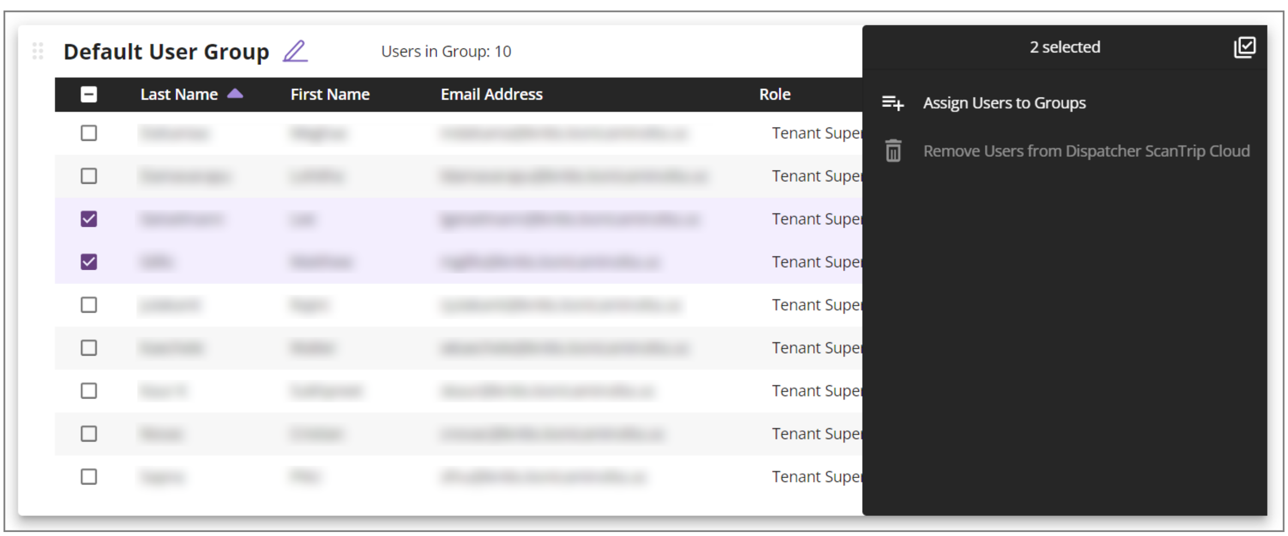
Configuring a User Group

The following sections describe your configuration options for user groups.

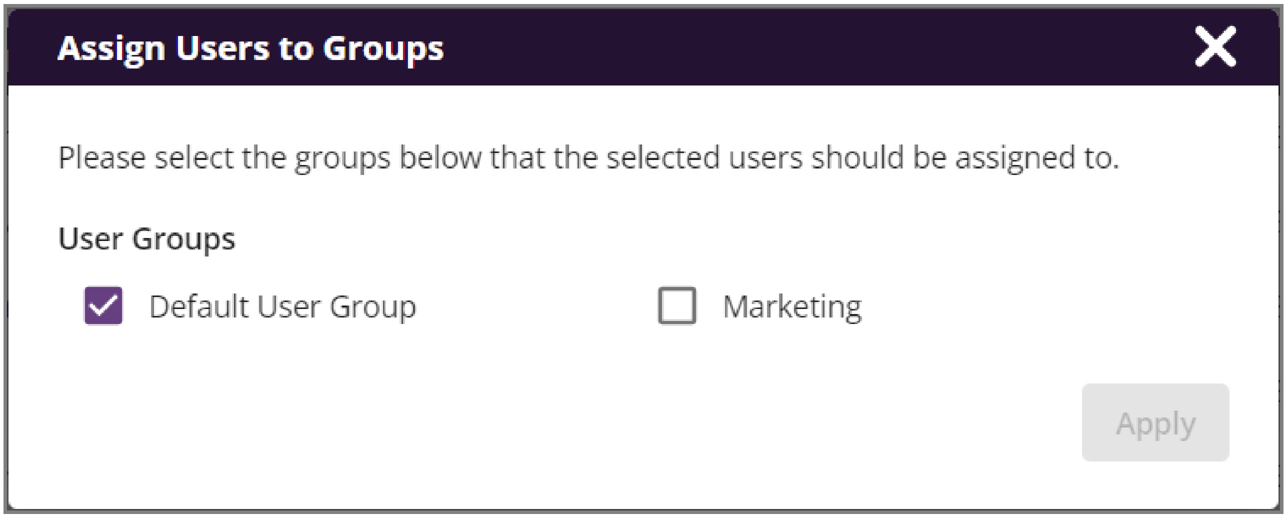
Assigning Users to a User Group

Once you create your own custom member groups, you can assign them to one or more of those groups. This process enables you to add or remove members in a group. Do the following:

1. Select the box next to each user whose group membership(s) you want to reassign. To select all members in a table, select the box on the Header bar. The Bulk Actions menu appears.



2. Select **Assign Users to Groups**. The Assign Users to Groups window appears:



3. Select the groups to which you want to assign the selected member(s), and leave the other boxes blank. The **Apply** button activates.
4. Once you have made your selections, select **Apply**. You return to the User Management page, where the member group tables update to reflect your selections.

Note: You can also assign users to groups when **inviting people to join the tenant**.

Search

Use the Search function to filter the member group tables to display only members matching a specified string. Do the following:

1. Select the Magnifying Glass icon on the Page header bar. The **Search Users** field appears.
2. Enter a search string. The member group tables on the page update immediately based on the specified search criteria.

Note: The Search feature searches the following fields:

- Last Name
- First Name
- Email Address
- Role

Workflows

Using the Workflow Designer

The Dispatcher ScanTrip Cloud Workflow Designer is a graphical interface you use to create document workflows. It includes drawing tools and drag-and-drop technology, enabling you to efficiently create intelligent, eye-catching workflows. This topic describes the many features and functions included in the Workflow Designer, and how to access it in Dispatcher ScanTrip Cloud .

For more information about getting started with the Workflow Designer, see the sections below:

- **Accessing the Workflow Designer**
- **Installing the Workflow Designer**

For overview information about working within the Workflow Designer, see the sections below:

- **Features of the Workflow Designer**
- **Menu bar**
- **Top Toolbar**
- **Drawing Tools**
- **Connectors bar**
- **Node Palettes panel**
- **Canvas**
- **Properties Panel - General**
- **Canvas Properties Panel**
- **Node Properties Panel**
- **Connector Properties Panel**
- **Text Properties Panel**
- **Ellipse Properties Panel**
- **Rectangle Properties Panel**
- **Line Properties Panel**
- **Multi Selection Properties Panel**
- **Group Properties Panel**
- **Status bar**
- **Building a Sample Workflow**

Accessing the Workflow Designer

Note: To access the Workflow Designer, you must be a Tenant Admin or User who has had at least one workflow shared with you with Edit permissions.

To access the Workflow Designer, do the following:

1. Log into your Dispatcher ScanTrip Cloud account.
2. Using the menu on the left, select **Workflows**.

   Workflow Designer Tool

   If you have not downloaded the Workflow Designer, select the **Download Workflow Designer** button in the upper-right hand corner, and follow the instructions in the Dispatcher Workflow Designer Setup Wizard. For more information, see the **Installing the Workflow Designer** section below. After that is completed, return to the Workflows page.
3. Select the **New Workflow** button. This will open the Workflow Designer with a blank canvas. You may also select the **Edit** button on one of the pre-installed sample workflows. This will open the Workflow Designer with the sample.

   Workflow Designer Tool

Installing the Workflow Designer

The Workflow Designer can be downloaded from within the tenant. To install the designer, do the following:

1. From the **Workflows** page, select the **Download Workflow Designer** button in the upper-right hand corner.

   Download Workflow Designer Tool

2. In your downloads folder, double-click the file **Dispatcher-Workflow-Designer-Setup.exe**. This will open the Dispatcher Workflow Designer Setup Wizard.

   Install Workflow Designer Tool

3. Select the **Next** button. Then, select the **I accept the agreement** radio button, and select the **Next** button.

4. Select the **Next** button, then the **Install** button, then the **Finish** button.

Finalize Workflow Designer Tool Installation

Installation is now complete. To access the Workflow Designer, see the **Accessing the Workflow Designer** section above.

System Requirements

Workflow Designer is designed to work on the following platforms:

- Windows Server 2022
- Windows Server 2019
- Windows Server 2016
- Windows 11
- Windows 10 **Note:** The latest Service Pack for these OS' is supported. For best operation, install the latest updates for your OS.

Your Operating System must support .NET Framework v4.8 or greater.

Supported Architectures

- x64 (64-bit)

Hardware Requirements Recommended: Quad Core, 2GHz or higher processor with 8 GB RAM; 512 MB of VRAM or higher; 2 GB or more available disk space

Video Card Requirements

Dispatcher® Workflow Designer is developed using Microsoft WPF technology, which is optimized for with newer hardware. Some graphics/visual artifacts may be seen when using Konica Minolta® Dispatcher Phoenix on PCs using older video drivers. Upgrading your video driver, or turning off hardware acceleration, may correct the issue.

Minimum Video Card Requirements:

- DirectX version: Greater than or equal to version 7.0
- Video RAM: Must be greater than or equal to 30MB.
- Multi-texture units: Number of units must be greater than or equal to 2.
- Graphics Card should support: Rendering Tier 1

Recommended Video Card Requirements:

- DirectX version: DirectX 9-capable video card running at 1024 x 768 or higher display resolution
- Video RAM: Must be greater than or equal to 512 MB.
- Pixel shader: Version level must be greater than or equal to 2.0.
- Vertex shader: Version level must be greater than or equal to 2.0.
- Multi-texture units: Number of units must be greater than or equal to 4.
- Graphics Card should support: Rendering Tier 2

Features of the Workflow Designer

The Workflow Designer screen includes the following panes, panels, and elements:

- **Menu bar** - Displays icons providing access to important functions, as well as a cascading drop-down menu with menu items providing access to additional controls.
- **Drawing Tools** - Displays icons for the objects that can be added to a workflow.
- **Connectors bar** - Displays icons for the connectors that can be used in a workflow. Connectors create *transitions* between nodes on the canvas.
- **Node Palettes panel** - Contains node palettes, each displaying icons for the nodes available in Dispatcher ScanTrip Cloud . The palettes are organized by node function:
    - Collection
    - Process
    - Distribution
- **Canvas** - The work area where you build and maintain your workflows.
- **Canvas Properties Panel** - Displays the properties of the Canvas. Use this panel to view and modify the properties of the workflow as a whole, including page size, orientation, and grid spacing. The panel appears when you do not have any objects selected and press the F4 key or right-click and select **Properties**.
- **Properties panel** - Displays the properties of the object currently selected on the canvas. Use this panel to view and modify the visual attributes of the selected object, such as the size or color. The panel appears when you right-click on an object and select **Properties** or press the F4 key.
- **Status bar** - Displays information on the current workflow such as the page size and the X/Y coordinates of the selected object. Also provides access to several functions including the **Zoom** slider and the Show Grid icon.

Menu Bar

The Menu bar appears near the top of the screen and displays icons providing access to important functions, as well as a cascading drop-down menu with menu items providing access to additional controls. See the following illustration:

Menu bar

Top Toolbar

On the main application screen, the toolbar at the top of the screen contains icons and pull-down menus which perform some of the more commonly used functions. Many of these functions include visual indicators when they are activated. These functions include:

Icon	Image	Shortcut
Save Icon	Save	Ctrl + s
Save and Close Icon	Save and Close	Ctrl + w
Print Icon	Print	Ctrl + p
Export Icon	Export	Ctrl + e
Favorite Icon	Favorite	NA
Cut Icon	Cut	Ctrl + x
Copy Icon	Copy	Ctrl + c
Paste Icon	Paste Duplicate	Ctrl + v
Delete Icon	Delete	Del
Undo Icon	Undo	Ctrl + z
Redo Icon	Redo	Ctrl + y
Validate Icon	Validate	F12
Full Screen Icon	Full Screen	F11
Help Icon	Help	F1
Menu Icon	Menu	NA

Menu Bar Drop-Down

The Menu bar includes a drop-down menu indicated by a triangle located to the right of the Menu bar icons. The Menu Bar Drop-down is a cascading menu tree that provides centralized access to most of the functions available in the Workflow Designer. Note that the Workflow Designer also provides context-sensitive access to many of these functions, such as via the dynamic Context menu that appears when you right-click on an object on the canvas.

If you click on the triangle on the Menu Bar Drop-Down, the following menu options appear:

- **File**
- **Edit**
- **View**
- **Insert**
- **Shape**
- **Project**
- **Help**

Each menu option displays its own triangle, indicating additional options are available when you click on the menu item. The following illustration shows the options available from the Menu Bar Drop-down menu:

File menu Edit menu View menu Insert menu Shape menu Project Help menu

File Menu

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

File menu

- Select **Save** to put the workflow in a proprietary location.

  Note: Changes to workflows are not uploaded to the site until the workflow is saved and closed. However, the Workflow Designer contains an autosave function that saves a local copy of any unsaved workflow every 90 seconds. If an autosave version of a workflow exists when you open the Workflow Designer, you will be given the option to open the autosaved version of the workflow.

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

Export

On the Export window, do the following:

1. In the Directory field, enter a file location to save the export to.
2. In the File Name field, enter a **File Name** for your exported file.
3. Choose the **Format** you want using the appropriate radio buttons (XPS, PDF, PNG).
4. Select the pages you would like to export. If the workflow contains multiple pages, you can select the pages you want to include in the export. Click on the pages you want to include until they are highlighted. Remove the highlighting from the pages you want to exclude. To select all pages, check the box at the **Select All** field.
5. Select the **Export** button to save the exported file. To exit the process without saving, click on the **Cancel** button.

- Select **Page Setup…** to edit or set defaults for the workflow page.
    1. Choose **Paper Size**, and measurement units: Inches, Pixels, Centimeters, Millimeters, or Points. If you select Custom Size, you can specify your own dimensions for the canvas.
    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.
- Select **Exit** to close the application.

Edit Menu

The Edit menu includes many editing functions that are typical of Windows applications. Note that these functions are also available via the Context menu by right-clicking on an object.

Edit menu

Options on the Edit menu are:

- Select **Undo** to reverse the last action you performed. For example, if you delete 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
- Changing properties (color, font size, stroke)

- Select **Cut** to remove the selected element and copy it to the clipboard.
- Select **Copy** to copy the element to the clipboard.
- Select **Paste Duplicate** (only available if you copy a node such as the Advanced OCR node) 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. If the clipboard is empty, this option is disabled.

  When you select this option, the pasted copy appears on top of the original, in a selected state. Click and drag the pasted object to the desired location on the canvas.

  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 **Paste Original** (only available if you copy a node such as the Advanced OCR node) 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.

  This option is available only for copied nodes. It creates an additional instance of the node so that the workflow now contains two instances of the same node. Any change to the **configuration** of an instance of the node updates the other instances as well. In this way, you can include multiple instances of a node in a workflow while having to maintain only one. For example, a large workflow may require multiple pages for clarity, and the Paste Original function allows you to duplicate a node across multiple pages.

  Both the pasted copy and the original node appear with a colored background, indicating they are instances of the same node. If you click away from the nodes, the colored background disappears but reappears when you select either of the nodes again.

  When you paste a node using the Paste Original function, the pasted copy appears on top of the original, in a selected state. Click and drag the pasted node to the desired location on the canvas. You can repeat this process to create additional instances of the original node. Note that if you attempt to delete any of the instances, a popup window appears with the option to delete the selected node, all instances of the node, or cancel the delete operation.

  If the clipboard is empty, or does not contain a copied node, this option does not appear on the menu.

  In the following illustration, the MFP Capture node was copied to the clipboard and pasted to the canvas using the Paste Original function. The copy was then dragged to a new location. The turquoise backgrounds indicate the original node and the copied instance. A third MFP Capture node, named MFP Capture 2, was also added to the canvas. Its background does not match the other MFP Capture nodes, indicating it is a unique version of the node and not an instance of the original node.

Using the Paste Original Function

Notes:

  - Only changes to a node's **configuration** affect other instances of a node. Changes to a node's appearance (for example, size or color) do not affect other instances of the node.
  - You can always drag a new version of the node from the Node palette onto the canvas. However, since this new version is not created via the Paste Original feature, the Workflow Designer does not treat it as an instance of another node.

- Select **Lock/Unlock** to lock an object 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.

  Caution! Even if an object is locked, it can still be deleted. The "locking" is only positional with regard to the work area.

- Select **Add to Favorites…** to create your own custom node 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,
  - Hover over the node and 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:

  Favorites

  To remove a node from a Favorites group, hover over the node and click on the **heart x** icon in the upper left corner of a node in the group or right-click on the node in the palette and select **Remove from Favorites…** from the menu that appears.

  Remove Favorites

  - To organize the nodes palettes if you have created more favorites groups, right-click on the **My Favorites** palette and select **Organize Favorites…**. In the Organize Favorites window, you can do the following:

        - Drag the palettes in the order that you prefer.
        - **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.

- Select **Select All** to select all objects of a particular subset.
    - Select all Connectors or press Ctrl+Shift+C
    - Select all Nodes or press Ctrl+Shift+N
    - Select all Text Elements or press Ctrl+Shift+T
    - Select all Rectangles or press Ctrl+Shift+R
    - Select all Ellipses or press Ctrl+Shift+E
    - Select all Lines or press Ctrl+Shift+L
    - Select All Shapes or press Ctrl+A

      Note: Selecting **All Shapes** selects all objects on the canvas, not only Rectangles, Ellipses, and/or Lines.

  You can also select objects by clicking on the **Select/Resize** tool and then drawing a selection box around one or more objects on the canvas. Any objects completely inside the selection box are selected. You can then perform an action on the selected devices, such as cut or copy.
- Select **Select Similar Shapes** to select all objects of the same type as the selected object. For example, right clicking on a node and selecting **Select Similar Shapes** will select all nodes.

  Note: The **Select Similar Shapes** option is not restricted to only Rectangles, Ellipses, and/or Lines.

View Menu

- Select **Toolbars** to display or hide toolbars (the icons at the top of the canvas area), Drawing Tools, Nodes 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).
- Select **Grid** to display or hide the grid. This function can also be performed using the Grid icon at the bottom of the screen (Grid).
- Select **Snap to Grid** to toggle whether the Workflow Designer pulls 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 (Snap to Grid).

- Select **Zoom In** to magnify the view of the canvas (bring you closer to the canvas) by 10%.
- Select **Zoom Out** to reduce the view of the canvas (take you farther from the canvas) by 10%.
- Select **Full Screen** to have the Workflow Designer 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.

Using the Zoom Function

You can adjust the zoom level of the canvas using any of the following areas of the Workflow Designer:

- On the **Status bar**, a Zoom slider appears at the far-right.
- Press Ctrl + + to magnify the view of the canvas by 10 percentage points.
- Press Ctrl + - to reduce the view of the canvas by 10 percentage points.
- On the **Canvas Properties panel**, a zoom slider appears in the Grid Settings panel.
- On the **View Menu**, options to zoom in and zoom out are available.

Insert Menu

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

Insert menu

- Select **New Page** to add a new page to a workflow.
- Select **Text** to add a note, title, or other text to the canvas workflow area.
- Select **Rectangle** to draw a rectangle or square. Rectangles and nodes can be rotated using the small circle above the object.
- Select **Ellipse** to draw an oval or circle.
- Select **Line** to draw a line on the canvas.
- 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 below to show or hide symbols (arrowheads), 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 the 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 one page, 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).

Multiple pages

Shape Menu

The **Shape** menu allows you to arrange the objects on the canvas.

- Select **Group** to group objects together.
- Select **Ungroup** to return grouped objects to individual objects on the canvas.
- Select **Bring to Front** to place the selected object(s) in front of other objects.
- Select **Send to Back** to place the selected object(s) behind other objects.
- Select **Bring Forward** to place the selected object in front of other objects one level.
- Select **Send Backward** to place the selected object behind other objects one level.
- To select similar objects (such as all rectangles or all text boxes), 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

Project

Select **Validate** to check that your workflow is logical and does not violate any of the rules of the application.

Help Menu

Help menu

- Select **Help Topics** to access online help.
- Select **About Dispatcher Workflow Designer…** to view information about your copy of the application.

Drawing Tools

This toolbar appears at the far-left of the Workflow Designer screen, above the Connectors bar. It contains icons you use to add objects such as rectangles and text boxes to your workflow. The following drawing tools are available for use in a workflow.

Icon	Function	Description
Tools	**Select/Resize**	Use this tool to select objects on the canvas. Once selected, you can rotate or resize the object(s) by dragging the surrounding handles to the desired state.
Tools	**Text Box**	Use this tool to add a box with text to the canvas.
Tools	**Rectangle**	Use this tool to draw a rectangle on the canvas.
Tools	**Circles/Ellipses**	Use this tool to draw an oval on the canvas.
Tools	**Line**	Use this tool to draw a line on the canvas.

To add an object to the canvas, do the following:

1. Click on the icon in the Drawing Tools area (for example, the Rectangle icon).
2. On the canvas, click and drag in the area where you want the object to appear. The object displays on the canvas in a “selected” state.
3. While the object is selected, you can:
    - Perform functions such as Move or Resize.
    - Right-click on the object to display the Context menu.
    - Access the Properties panel for the object type, like the Rectangle Properties panel.

Select / Resize Tool

The Select/Resize tool icon appears in the Drawing Tools as an arrow with handles at each corner. Use this tool to perform any of the following functions on an object on the canvas:

- Select
- Resize
- Move
- Rotate

Do the following:

1. Click on the Select/Resize tool.
2. Click on an object to select it. A surrounding box with “handles” appears. The surrounding box does not appear if you select a line.
3. Once selected, you can do the following:
    - To move the object, click inside the surrounding box and drag it to a new location on the canvas.
    - To resize the object, click on a handle and drag.
    - To rotate the object, click on the small circle above the surrounding box and drag. To “rotate” a line, open the Line Properties panel and modify the angle.

Notes:

- The Resize option, if used on a group, resizes all of the objects in the group simultaneously.
- To change the font size of the selected text, use the Text section of the Properties panel.

Multiple Select

To select multiple objects on the canvas, you have the following options:

- 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 (if any).

Multi-select

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.

   - Use the **Layout** section to change the stroke thickness and style.

   - Use the different buttons to change the **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.

   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:

   Text

   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.

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.

Rectangle and Ellipse Drawing Tools

You can add rectangles and/or ellipses to a workflow. These shapes may be used to visually associate objects or otherwise enhance the appearance of your workflow. You can apply colors to the objects as well, such as to represent areas of responsibility.

To draw objects on the canvas using the tools available in the **Drawing Tools**, do the following:

1. Click on the Rectangle or Ellipse drawing tool to select it.

2. Click on the canvas and drag the pointer to draw the object. The object appears on the canvas in a “selected” state.

3. While the object is selected, you can:
    - Use the handles surrounding the object to perform functions such as Move or Resize.
    - Access the Context menu for the object, where additional options are available. Right-click on the object to display the Context menu.
    - Access the **Rectangle Properties panel** (or the **Ellipse Properties panel**) to modify aspects of the object's appearance, such as the size or color.

Line and Arrow Drawing Tool

You can add lines to the canvas. For example, you can underline a page title or display visual separators on the canvas. Do the following:

1. Click on the Line icon in the **Drawing Tools**.
2. Click and drag on the canvas. The line appears on the canvas in a "selected" state. While the line is selected, you can:
    - Perform functions such as Move or Resize.
    - Right-click on the object to display the Context menu.
    - Modify the object using the **Line Properties panel**, where you can:
        - Apply arrowheads to the line.
        - Specify stroke thickness and/or style (for example, a dotted line).
        - Apply color and/or opacity.
        - Position the line on an angle. Note that the Workflow Designer does not allow you to apply an angle to a line that would cause it to run off the edge of the page.

Set Color Defaults

You can set color defaults for objects drawn on the canvas, and for the canvas area background and grid lines. For example, to define colors for a rectangle, 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.

Connectors Bar

This toolbar appears at the far-left of the Workflow Designer screen, below the **Drawing Tools**. It contains icons representing the various **connector styles** available in the Workflow Designer. Use the Connectors toolbar to add connectors to your workflow.

Connectors create transitions between nodes in a workflow. They determine the “flow” of documents and data through a workflow. Connectors flow data in one direction between nodes, and not back and forth. The flow direction is indicated by an **arrowhead** on the connector.

Connectors

Connectors create transitions between nodes and define the path that documents take through a workflow. 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.

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.

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 arrowheads. 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 routing workflow can indicate Yes and No decisions or an Error. You change the Connector Type under Layout, by selecting the connector and then the Type. For more information, see the **Properties Panel** section below.

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, 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.

Adding a Connector

To apply a connector to nodes in a workflow, do the following:

1. Select a **connector style** by clicking on an icon in the Connectors toolbar.
2. On the canvas, click on a node and drag the pointer over another node, then release the pointer. The connector appears on the canvas in a “selected” state, creating a transition where documents will flow from the first node to the second node (the target node).

   Note: If the connector does not appear, note the following:

   - When you release the pointer, it must be above the target node. That is, to appear on the canvas, a connector must be attached to two nodes.
   - You can apply only one connector between the same two nodes.

While a connector is selected on the canvas, you can:

- Right-click on the connector to display the Context menu.
- Access the **Connector Properties panel**, where you can modify the appearance of the connector.

Notes:

- A node not connected to another node performs no function in a workflow.
- Each connector in a workflow has an assigned **connector type**. The default type is “Normal”, but you can assign a different connector type, such as “Error”. You can also assign multiple connector types to a connector.
- If you place two nodes very close together on the canvas, any connector you apply to the nodes may not be visible on the canvas.
- To hide a connector’s directional arrowhead from appearing on the canvas, select the connector and uncheck the **Show Symbols** box on the **Connector Properties panel**.
- To attach a connector on the canvas to a different node, do the following:
    1. Select the connector.
    2. Click on a box at the end of the connector and drag the connector to a different node.

Connector Styles

When applying a connector to a workflow, you can choose from many styles. The **Connectors toolbar** provides access to the various connector styles available in the Workflow Designer.

All connector styles perform the same function - they connect two nodes together in a workflow. However, each connector style takes a different route from origin to destination. For example, the Straight connector follows a straight line while the HV connector travels horizontally first, then vertically. The variety of styles available helps you to quickly create attractive, easy-to-follow workflows.

In the following table of connector styles, “Node A” indicates the starting point of the connector, and “Node B” indicates the ending point.

Icon	Style	Path	Description
Tools	**Straight**	Straight	Originates from any side of Node A and connects to the closest side of Node B.
Tools	**Bezier Curve**	Curved line	Originates from any side of Node A and connects to the closest side of Node B.
Tools	**HV**	Horizontal to vertical	Originates from the left or right side of Node A and travels horizontally. Bends vertically, up or down, and connects to the top or bottom of Node B.
Tools	**VHV**	Vertical to horizontal to vertical	Originates from the top or bottom of Node A and connects to the top or bottom of Node B. The vertical segments of the line travel in the same direction, creating a “zigzag” line.
Tools	**VH**	Vertical to horizontal	Originates from the top or bottom of Node A and travels vertically. Bends horizontally, left or right, and connects to the left or right side of Node B.
Tools	**HVH**	Horizontal to vertical to horizontal	Originates from the left or right side of Node A and connects to the left or right side of Node B. The horizontal segments of the line travel in the same direction, creating a “zigzag” line.
Tools	**HVH Bracket**	Horizontal to vertical to horizontal	Originates from the left or right side of Node A and connects to the left or right side of Node B. The horizontal segments of the line travel in the opposite direction, forming a bracket shape.
Tools	**VHV Bracket**	Vertical to horizontal to vertical	Originates from the top or bottom of Node A and connects to the top or bottom of Node B. The vertical segments of the line travel in the opposite direction, forming a bracket shape.

Multiple Connectors to the Same Distribution Node

When you are creating your workflow in the Workflow Designer, if you want your files to move to the next Node regardless of the results of a routing rule, multiple Connectors can be drawn to the same Distribution Node. The connectors will be labeled **Y**, for Yes, then **N**, for No, and, if there is a third, **X**, for Error. You can manually label a Connector by selecting it and changing the **Connector Type**, under **Layout**.

Node Palettes Panel

The Node Palettes panel consists of three sub-panels containing icons representing the nodes available for use in the Workflow Designer. These panels are called node palettes. Each palette contains nodes of related functionality. In addition, the My Favorites panel appears after at least one node has been favorited.

- **My Favorites** - A custom palette included with the Workflow Designer. Use it to store your favorite nodes in a central location. Or, you can remove the palette from the Node Palettes panel. You can add additional custom palettes by creating a new group via the Add to Favorites window.
- **Collect** - A standard palette containing collection nodes such as **MFP Capture**.
- **Process** - A standard palette containing process nodes such as **Rename**. Process nodes “process” the document information collected by the collection node.
- **Distribute** - A standard palette containing distribution nodes such as **Email Out**. Distribution nodes output document data to a selected destination.

Note: Custom palettes such as My Favorites are optional. To remove a custom palette from the Node Palettes panel, click on the **X** on the title bar of the palette. All other node palettes are standard and cannot be deleted.

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

Node Palettes

Using this menu, you can do the following:

- Select **Float Window** to move the palette window anywhere around your Desktop.
- Select **Pin** to keep the palette open. Note that a pinned node palette will become unpinned when collapsed. Any node palettes that were pinned before the Workflow Designer starts will be in an open state when the Workflow Designer is launched next. Any unpinned node palettes will be in a closed state the next time the Workflow Designer is launched.
- 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.
    - Names under icons
    - Icons and names
    - Icons only
    - Names only
- Select **Sort By** to customize the organization of the nodes within the palette. Options are:
    - By name (alphabetical), which is the default setting
    - By type, separated by a line
    - By type with no separating line.

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 at the top of the Node Palette area. Do the following:

1. Enter the full or partial 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 “we”, which produces a single result of the **WebDAV Connector**:

   Demo Node Search

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

Using the Node Palettes Panel

Use the Node Palettes panel to:

- View the nodes available for use in workflows.
- Add nodes to a workflow.
- Customize the node palettes to best suit your needs.

Adding Nodes to a Workflow

To add a node to a workflow, drag and drop the node icon from the Node Palettes panel to the canvas. The node appears on the canvas in a “selected” state. While the node is selected, you can:

- Perform functions such as Move or Resize.
- Right-click on the object to display the Context menu.
- Modify the appearance of the node using the **Node Properties panel**, where you can:
  - Rename the node as it appears in the workflow.
  - Access the **Node Configuration window**.
  - Modify the node layout, including the stroke thickness and/or icon style.
  - Modify the appearance of the node’s supporting text in the workflow, such as the font.
  - Modify the color and/or opacity.

Canvas

The Canvas is the large area in the middle of the Workflow Designer where you build your workflow. Nodes and objects can be dragged and dropped onto the Canvas, where they will stay until moved. If the Snap to Grid feature is enabled (see **Canvas Properties** below), objects will align to the nearest grid point.

The Canvas area can be resized by clicking and dragging the boundary between the left side of the Canvas area and the right side of the Node Palettes area.

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

Properties

Elements of the Properties Panel

The Properties panel consists of a title bar and one or more sub-panels containing configuration options. The Properties panel is dynamic. That is, the content of the panel, including the name on the title bar, is determined by the type of object selected on the canvas at the time you open the Properties panel. The Properties panel can assume any of the following names, and contains options specific to the object type for which it is named:

- **Canvas Properties**
- **Node Properties**
- **Connector Properties**
- **Text Properties**
- **Ellipse Properties**
- **Rectangle Properties**
- **Line Properties**
- **Multi Selection Properties**
- **Group Properties**

The following illustration shows the Ellipse Properties panel, which appears when you open the Properties panel while an ellipse is selected on the canvas.

Ellipse Properties

Sub-Panels

A sub-panel is a panel within another panel. Like the Properties panel that contains them, sub-panels are dynamic and consist of a title bar and one or more configuration options. Their configuration options vary based on the selected object type. For example, the Layout panel appears in both the Canvas Properties and Node Properties panels, but its configuration options differ in each.

The Properties panel can include any of the following sub-panels:

- Layout - Settings include Height, Width, Stroke Style, Stroke Thickness, etc.
- **Color** - Includes a Color Picker tool as well as settings where you can specify which attribute of the object (fill, line, etc.) you want to colorize as well as the opacity of the attribute.
- Text - Settings include font, size, style, etc. Available only for text boxes and nodes (to modify the node label text).
- Properties (node) - Settings include Node Name and Enabled. Accesses the **Node Configuration window**. Also displays information on the node such as the metadata file format.

In the illustration above, notice that the Ellipse Properties panel includes a title bar and two sub-panels: the Layout and Color panels. The Text panel is not available, as ellipses cannot contain text.

Pin/Auto-Hide Option

On the Properties panel, the title bar displays a Pin icon. Use this icon to set your preference for displaying or hiding the Properties panel in the workflow. You have the following options:

- **Auto-Hide** - When you initially open the Properties panel in a workflow, it appears in a hovering state above the canvas. This state is called “Auto-Hide”. When Auto-Hide is active for the panel, you can hide the panel either by moving the pointer away from the panel or clicking on the **X** on the title bar.
- **Pin** - To force the panel to remain open while you work on the canvas, click on the Pin icon on the title bar of the Properties panel. In this state, the panel remains open until you click on the **X** button. To restore the Properties panel to Auto-Hide, click on the Pin icon again.

Note: The Pin icon is not available for sub-panels. The following illustration shows the Canvas Properties panel, whose title bar displays the Pin icon but whose sub-panel, the Layout panel, does not:

Pinned Properties Panel

Float Window Option

Each sub-panel in the Properties panel contains a Float Window icon on the title bar. If you click on this icon, the sub-panel disengages from the Properties panel and is placed in a floating state over the canvas. You can position the floating panel anywhere on your desktop by clicking and dragging on the title bar.

You can float multiple sub-panels at the same time. To dock a floating panel back into the Properties panel, click on the **X** button in the floating panel.

In the above illustration of the Canvas Properties panel, the Float Window icon appears on the title bar of the sub-panel (the Layout panel).

Setting Default Properties

If you modify any settings on the Properties panel, you can save the configuration as the default settings for the Workflow Designer. The configuration will then appear in the panel the next time you access the panel, and thereafter until you modify the default settings again. You can also return the Properties panel to the application's default configuration.

Default properties are set by sub-panel. Each sub-panel in the Properties panel (for example, Layout, Text, or Color) includes a title bar with a small arrow button that provides access to the Default Properties menu. You can also access the Default Properties menu by right-clicking on a section of the Properties panel. The following options appear:

- **Set as Default** - When you modify a setting in the Properties panel (for example, Size) and you want to make it the default, access the Default Properties menu for the sub-panel containing the setting and select **Set as Default** from the menu that appears.

  Note: If an arrow appears next to the **Set as Default** option, then when you hover or click on the option, a second menu will appear listing sections of the panel. Select the section containing the setting(s) you want to save as default.

  See the following illustration:

Set as Default Menu Options

- **Restore Default** - To restore the settings in a sub-panel of the Properties panel (for example, the Text panel) back to the application's default configuration, access the Default Properties menu for the sub-panel containing the setting and select **Restore Default** from the menu that appears.

  Note: If an arrow appears next to the **Restore Default** option, a second menu will appear listing sections of the Properties panel. Select the section containing the setting(s) you want to restore to the application’s default configuration.

Using the Color Panel

The Color Panel is a sub-panel of the Properties panel. It contains options that allow you to modify the colors of the attributes of an object selected on the canvas. You can also apply a color gradient to the attribute. You can then save the color or color gradient as the **default color**, if desired. See the following illustration:

Color Panel

The selected color brush indicates the current color of the attribute. You can modify the color in the following ways:

- Select a swatch from the default colors panel.
- Specify the RGB levels of the color in the Input fields.
- Specify the hex code of the color in the Hex field.
- Create a custom color in any of the following ways:
    - Modify one or more of the Input fields.
    - Modify the Hex field.
    - Use the Hue slider and/or the Saturation picker to create a color.

The Color Panel contains the following controls:

- **Attribute selectors** - Use these buttons to select the attribute of the object you want to modify, such as text, line, or fill. Not all buttons will be active for all object types. For example, the Text button is not active for rectangles because rectangles cannot contain text.
- **Saturation picker** - Saturation is the intensity of the color. Black and white images have no color saturation, while color images have varying degrees of color saturation.
- **Hue slider** - Hue is the base color, such as red or blue. Hue can also be the shade of the base color, such as orange or purple. To modify the hue of the selected attribute, click and drag the arrow in the slider to the desired hue.

  Note: If modifying black (0, 0, 0,) or white (255, 255, 255), the Hue slider does not change the RGB values.
- **Input fields** - These fields display the RGB color values (red, green, and blue) of the selected object attribute. To modify a value, click in the field and enter a value from 0 to 255.
- **Hex** - The hex code is a hexadecimal representation of a color’s RGB value. The hex code combines three values – the amounts of red, green, and blue in a particular shade of color.

- **Opacity slider** - Color opacity is a value from 1 to 100 that indicates the color transparency of the selected attribute. A color opacity value of 1 fully obscures anything on the canvas positioned beneath the attribute. A value of 100 renders the color completely transparent. To adjust an attribute’s color opacity, click and drag the slider to the desired value.
- **Pre-set colors** - To select from a standard palette of colors, click on a swatch.
- **Color brushes** - The following color brushes are available:
  - **Solid brush** - Applies the selected color evenly across the surface of the attribute.
  - **Gradient brush** - Applies a color gradient to the attribute. A color gradient is a transition between two or more colors. The Gradient brush transitions between the selected color and white. When you click on this option, a panel of gradients appears. Select the gradient you want to apply to the color.
    - **Fade to Transparent** - To remove the white portion of the color gradient so that it appears transparent, check this box.

When you modify a control on the Color Panel, the other controls update accordingly to reflect the change.

Canvas Properties Panel

The Canvas Properties panel appears when you open the Properties panel while the canvas is selected. It is a sub-panel of the Properties panel. See the following illustration:

Canvas Properties

The Canvas Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the canvas:

Layout Panel (Canvas)

Use the Layout panel to modify the layout and arrangement of the workflow canvas. The panel includes the following sections:

Page Setup

This section Layout panel (Canvas) includes the following settings:

- **Project Name** - The name of the project.
- **Size** - Specify the “paper size” (the size of the canvas). The drop-down menu includes many commonly-used sizes. If you select Custom, you can specify your own dimensions for the canvas.

- **Width** - If you select Custom Size at the **Size** field, this field activates and you can specify the width of the canvas. You can also specify a unit of measurement, such as “pixels”. Note that if you change the unit of measurement at this field, the unit of measurement at the **Height** field updates to match your selection.
- **Height** - If you select Custom Size at the **Size** field, this field activates and you can specify the height of the canvas. You can also specify a unit of measurement, such as “pixels”. Note that if you change the unit of measurement at this field, the unit of measurement at the **Width** field updates to match your selection.
- **Orientation** - Options are Portrait or Landscape.
- **Drawing Scale** - Set the desired drawing scale (if any), in inches.

Default Error Node

The Workflow Designer needs to know where to send documents that “error out” of the workflow. You can add an error output node for each node in the workflow, or you can use this section to define a default error node to handle all error transitions. All failed documents are then directed to the default error node.

To enable the default error node for a workflow, click on the **Default Error Node** drop-down menu and select a target node from the list that appears. To disable the default error node for a workflow, select **No Default** from the drop-down list.

Note: The default error node is not visible within the workflow.

Grid Settings

Use this section to enable or disable the alignment grid. Enabling the grid helps you align objects on the canvas. You have the following options:

- **Grid Spacing** - Use this slider to specify the space between grid lines on the canvas.
- **Zoom** - Use this slider to specify the **zoom** percentage of the canvas view.
- **Show/Hide Grid** - Use this toggle button to show or hide the grid.
- **Snap to Grid** - Use this toggle button to “snap” objects to the nearest grid line, or to turn off Snap to Grid for the workflow. Snap to Grid applies to new objects you add to the canvas, or to existing objects on the canvas that you move to a new position.
- **Cross-Hair Lines** - Use this toggle button to turn on or off the Cross-Hair Lines function. This function helps you align objects on the canvas.

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 an icon or image. By default, the workflow displays the first page of the workflow.
- **Select an Image** - This allows you to choose from many preloaded images or browse for an image from your computer.

Background Image

Adding a background image to your workflow can be visually attractive and also help to indicate the purpose or function of the workflow. For example, you can use a favorite photograph, a floor plan, or a map.

Do the following:

1. Double-click on the canvas, or open the Properties panel when no objects are selected.
2. In the Background Image area of the Canvas Properties panel, check the **Enable** box.
3. Click on the Select an Image button. A folder browsing window appears.
4. Browse to the folder containing the image that you want to use.

   Note: The list of files is restricted to PNG, JPG, GIF, and BMP file types.
5. Select the desired file, and then click on **Open** to upload it. The selected image appears on the canvas, underneath any existing objects on the canvas.

Once uploaded, you have the following configuration options:

- **Brightness** - Use the slider bar to change the brightness of the image.
- **Positioning** - Define where to position the image. You have the following options:
  - **Fit to Canvas**
  - **Center**

  Notes:

  - If the image is larger than the canvas, Workflow Designer will shrink the image to fit the canvas, even with the Center option selected.
  - If the image is small, such as an icon-sized image (45 x 45 pixels), choosing Fit to Canvas may distort the image as Workflow Designer expands the image to fit the canvas.

Color Panel (Canvas)

The **Color panel** is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the canvas. You have the following options:

- Attribute Selector buttons - Select the attribute to modify:
  - Text - Not available for the canvas.

- Grid Lines
- Background

Node Properties Panel

The Node Properties panel appears when you open the Properties panel while a node on the canvas is selected. It is a sub-panel of the Properties panel. See the following illustration:

Node Properties Panel

The Node Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the appearance of the node:

Properties Panel (Node)

Use this panel to modify the properties of a node on the workflow canvas. The Properties panel (Node) includes the following sections:

- **Node Name** - Modify the node name as it appears on the canvas.
- **Enabled** - Enable or disable the node in the workflow. If you disable a node, the workflow ignores it.
- **Edit Node Properties button** - Accesses the **Node Configuration window** for the selected node.

Layout Panel (Node)

Use this panel to modify the attributes of the selected node. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the node as it appears on the canvas. Note that you can also resize the node by selecting it on the canvas and dragging the handles.
- **Left**, **Top** - Use these fields to relocate the node on the canvas. Specify the left and top coordinates. Note that you can also relocate the node by clicking and dragging it on the canvas.
- **Angle (degrees)** - Rotate the node. Do one of the following:
  - Click and drag the slider. The node rotates on the canvas and the number of degrees of the angle updates in the associated entry field.
  - Enter a number of degrees directly into the entry field.

  Note: You can also rotate the node by selecting it on the canvas and dragging the circular Rotate handle.

- **Stroke Thickness** - Modify the thickness of the stroke surrounding the node's label. Do one of the following:
    - Click and drag the slider. The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
    - Enter a number of pixels directly into the entry field.

  Note: To see the stroke surrounding the node's label, its color must be different from the label's fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.

- **Stroke Style** - The current style of the stroke forming the node's supporting text box displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).
- **Icon Style** - To change the icon used to represent an object used in the Workflow Designer, click on the **Change Icon** button to access the Select an Image window.
    - **Change Icon** - To **change the icon** used to represent the node currently selected on the canvas, click on this button.
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.
    - **Grouping** - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, group them together. Select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.

      Note: Although nodes can be grouped, any connectors attached to the nodes will not be part of that grouping.
    - **Ordering** - "Ordering" is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Text Panel (Node)

The Text panel is a sub-panel of the Properties panel. Use the Text panel to format the text in the selected box below the selected node. You have the following options:

- Font family
- Font size
- Text style
- Text alignment

Color Panel (Node)

The Color panel is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected node. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:
    - Text
    - Line
    - Fill

Node Configuration Window

Use the Node Configuration window to modify the node’s configuration. To access the Node Configuration window, do one of the following:

- Double-click on a node in a workflow.
- Access the **Node Properties panel** and click on the Edit Node Properties button. See the following illustration:

    Edit Node Properties button

The controls that appear in the Node Configuration window vary depending on the selected node. For example, for many distribution nodes, the Node Configuration window includes the Connection Timeout field. For the Rename node, you use the Node Configuration window to specify the file name components (for example, Counter and File Extension) you want to use when renaming files in the workflow. The following illustration shows the Node Configuration window for the Dropbox Connector node:

Node Configuration Window for Dropbox Connector

Notes:

- The Node Configuration window is distinct from the **Node Properties panel**, which appears when you select a node in a workflow and then open the Properties panel.
- For details on a node’s configuration window, see the Help topic for the individual node.

Change Icon Button

Use this button to change the icon used to represent the node currently selected on the canvas. You can replace one or more icons with any of the following image file types:

- BMP
- JPEG
- PNG
- GIF

Note: This process changes only the node image and not the node label.

To change a node’s icon, do the following:

1. Select the node on the canvas.
2. Open the **Node Properties panel**. You can also access this option by right-clicking on a node.
3. Click on the **Change Icon** option. The Select an Image window appears.
4. In the Select an Image window, specify the repository containing the image you want to select. You have the following options:
    - **From Canvas Icon Library** - To select from the Workflow Designer’s Canvas Icon Library, click on this tab.
    - **From Your Own Images** - To select an image from a source outside of the Workflow Designer, click on this tab. You have the following options:
        - **From File...** - Browse a local or network drive and select a file.
        - **From Clipboard** - Select the current contents of the Windows clipboard. If the clipboard is empty, this option is disabled.
5. Once you identify the file you want to use as your new icon, a preview window appears where you can view the image. A selection box with “handles” appears over the image via which you can crop the image, click and drag the selection box to a new location, and/or click and drag the handles to resize. The current contents of the selection box appear in the right pane of the Select an Image window.
    - **Memory Optimization** - This box is checked by default. It limits the memory your system uses when uploading and formatting the selected image.

      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 a better image will use more resources on your PC.

    When the preview is acceptable, click on the **Select** button. See the following illustration:

    The Select an Image Window - Crop Image

Connector Properties Panel

The Connector Properties panel appears when you open the Properties panel while a **connector** is selected on the canvas. It is a sub-panel of the Properties panel. Use it to modify the style and appearance of the connector selected on the canvas, as well as its position among other objects on the canvas. See the following illustration of the panel:

Connector Properties Panel

Layout Panel (Connector)

The Layout sub-panel contains the following sections:

Connector Type

Connectors flow documents from one node to another in a workflow. They can be of two types:

- **Standard** - The default connector type. This type routes successfully processed documents to a specified node and ignores failed documents. By default, Standard connectors are not labeled.
- **Negative** - This type routes documents that do not fit the “yes” condition of the specified routing node.
- **Error** - This type routes failed documents (documents that “error-out”) to a specified node and ignores successfully processed documents.

Note: You can apply multiple connector types to the same connector. For example, a connector may use both the Standard and Error connector types if you want to route all files processed by a node to the same target node, including files that error-out. By default, connectors with multiple connector types have the “Show Symbols” option enabled.

Show Symbols

To display informational symbols on the selected connector such as directional arrowheads, check this box. To hide the symbols, leave the box blank. By default, all connector types except Standard connectors default to having the Show Symbols option enabled.

When a Process Fails - Using Error Connectors

Important! If a document causes a process in a workflow to fail and create an error (for example, a condition specified in a node such as the Advanced OCR node was not met), Workflow Designer needs to know where to route the failed document. Otherwise, Workflow Designer can lose track of the file (the file processed in the workflow, not the source file collected by the workflow) and the file may be lost.

To route failed documents in a workflow, you have the following options:

- Add one or more nodes (typically, distribution nodes) to act as designated error locations. The connectors attached to these nodes must include the Error connector type. Note that unless you apply an error node and connector to each collection and process node in the workflow, you risk losing track of files (that is, files that error-out at nodes to which you did not attach a designated error location).
- Designate a **Default Error node** for the workflow. All failed documents not routed to a designated error location are routed to this folder.

Note: You can use both of the above options in a workflow. You can route some failed documents to designated error locations and the rest to the Default Error node.

Connector Style

This section contains icons representing the various **connector styles** available in the Workflow Designer. The current style is highlighted. To change the style, click on an icon.

All connector styles perform the same function - they connect two nodes together in a workflow. However, each connector style takes a different route from origin to destination. For example, the Straight connector follows a straight line while the HV connector travels horizontally first, then vertically. The variety of styles available helps you to quickly create attractive, easy-to-follow workflows.

Grouping and Order (Connector)

Use these buttons to modify the grouping and order of the selected connector(s).

- Grouping - Grouping is not available for connectors.
- Ordering - “Ordering” is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Color Panel (Connector)

The **Color panel** is a sub-panel of the Connector Properties panel. Use the Color panel to modify the colors of the attributes of the selected connector. You have the following options:

- Attribute Selector buttons - Select the attribute to modify:
  - Text - Not available for connectors.
  - Line
  - Fill - Not available for connectors.

Text Properties Panel

The Text Properties panel appears when you open the Properties panel while a text box is selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Text Properties Panel

The Text Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the text box:

Layout Panel (Text)

Use this panel to modify the attributes of the selected text box. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the text box as it appears on the canvas. Note that you can also resize the text box by clicking it on the canvas and dragging the handles.
- **Left**, **Top** - Use these fields to relocate the text box on the canvas. Specify the left and top coordinates. Note that you can also relocate the text box by clicking and dragging it on the canvas.
- **Angle (degrees)** - Rotate the text box. Do one of the following:
    - Click and drag the slider. The text box rotates on the canvas and the number of degrees of the angle updates in the associated entry field.
    - Enter a number of degrees directly into the entry field.

  Note: You can also rotate the text box by clicking it on the canvas and dragging the circular Rotate handle.
- **Stroke Thickness** - Modify the thickness of the stroke surrounding the text box. Do one of the following:
    - Click and drag the slider. The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
    - Enter a number of pixels directly into the entry field.

  Note: To see the stroke surrounding the text box, its color must be different from the text box's fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.
- **Stroke Style** - The current style of the stroke forming the text box displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.
    - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button

    is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.

    - Ordering - “Ordering” is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Text Panel (Text)

The Text panel is a sub-panel of the Text Properties panel. Use the Text panel to format the text in the selected text box. You have the following options:

- Font family
- Font size
- Text style
- Text alignment

Color Panel (Text)

The **Color panel** is a sub-panel of the Text Properties panel. Use the Color panel to modify the colors of the attributes of the selected text box. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:
    - Text
    - Line
    - Fill

Ellipse Properties Panel

The Ellipse Properties panel appears when you open the Properties panel while an ellipse is selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Ellipse Properties

The Ellipse Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the ellipse:

Layout Panel (Ellipse)

Use this panel to modify the attributes of the selected ellipse. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the ellipse as it appears on the canvas. Note that you can also resize the ellipse by clicking it on the canvas and dragging the handles.
- **Left**, **Top** - Use these fields to relocate the ellipse on the canvas. Specify the left and top coordinates. Note that you can also relocate the ellipse by clicking and dragging it on the canvas.
- **Angle (degrees)** - Rotate the ellipse. Do one of the following:
    - Click and drag the slider. The ellipse rotates on the canvas and the number of degrees of the angle updates in the associated entry field.
    - Enter a number of degrees directly into the entry field.

  Note: You can also rotate the ellipse by clicking it on the canvas and dragging the circular Rotate handle.
- **Stroke Thickness** - Modify the thickness of the stroke surrounding the ellipse. Do one of the following:
    - Click and drag the slider - The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
    - Enter a number of pixels directly into the entry field.

  Note: To see the stroke surrounding the ellipse, its color must be different from the ellipse's fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.
- **Stroke Style** - The current style of the stroke forming the ellipse displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.
    - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.
    - Ordering - "Ordering" is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Color Panel (Ellipse)

The **Color panel** is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected ellipse. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:
  - Text - Not available for ellipses.
  - Line
  - Fill

Rectangle Properties Panel

The Rectangle Properties panel appears when you open the Properties panel while a rectangle is selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Rectangle Properties

The Rectangle Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the rectangle:

Layout Panel (Rectangle)

Use this panel to modify the attributes of the selected rectangle. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the rectangle as it appears on the canvas. Note that you can also resize the rectangle by clicking it on the canvas and dragging the handles.
- **Left**, **Top** - Use these fields to relocate the rectangle on the canvas. Specify the left and top coordinates. Note that you can also relocate the rectangle by clicking and dragging it on the canvas.
- **Angle (degrees)** - Rotate the rectangle. Do one of the following:
  - Click and drag the slider. The rectangle rotates on the canvas and the number of degrees of the angle updates in the associated entry field.
  - Enter a number of degrees directly into the entry field.

  Note: You can also rotate the rectangle by clicking it on the canvas and dragging the circular Rotate handle.
- **Stroke Thickness** - Modify the thickness of the stroke surrounding the rectangle. Do one of the following:
  - Click and drag the slider - The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
  - Enter a number of pixels directly into the entry field.

  Note: To see the stroke surrounding the rectangle, its color must be different from the rectangle’s fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.

- **Stroke Style** - The current style of the stroke forming the rectangle displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).

- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.

    - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.

    - Ordering - “Ordering” is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Color Panel (Rectangle)

The **Color panel** is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected rectangle. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:

    - Text -Not available for rectangles.

    - Line

    - Fill

Line Properties Panel

The Line Properties panel appears when you open the Properties panel while a line is selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Line Properties Panel

The Line Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the line:

Layout Panel (Line)

Use this panel to modify the attributes of the selected line. You have the following options:

- **Angle (degrees)** - Rotate the line. Do one of the following:

    - Click and drag the slider. The line rotates on the canvas and the number of degrees of the angle updates in the associated entry field.

    - Enter a number of degrees directly into the entry field.

- **Stroke Thickness** - Modify the thickness of the line. Do one of the following:
    - Click and drag the slider - The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
    - Enter a number of pixels directly into the entry field.
- **Stroke Style** - The current style of the stroke forming the line displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).
- **Arrow Style** - The current style of the arrowhead(s) attached to the line display below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, arrowheads at the end of the line or in the middle).
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.
    - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.
    - Ordering - “Ordering” is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Color Panel (Line)

The Color panel is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected line. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:
    - Text - This option is not available for a line.
    - Line
    - Fill - This option is not available for a line.

Multi Selection Properties Panel

The Multi Selection Properties panel appears when you open the Properties panel while multiple objects are selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Multi Selection Panel

The Multi Selection Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the selected objects:

Layout Panel (Multi Selection)

Use this panel to modify the attributes of the selected objects. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the selected objects as they appear on the canvas.
- **Left**, **Top** - Use these fields to relocate the selected objects on the canvas. Specify the left and top coordinates. Note that you can also relocate the selected objects by clicking and dragging them on the canvas.
- **Angle (degrees)** - Rotate the selected objects. Do one of the following:
  - Click and drag the slider. The selected objects rotate on the canvas and the number of degrees of the angle updates in the associated entry field.
  - Enter a number of degrees directly into the entry field.
- **Stroke Thickness** - Modify the thickness of the stroke surrounding each of the selected objects. Do one of the following:
  - Click and drag the slider - The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.
  - Enter a number of pixels directly into the entry field.

  Note: To see the strokes surrounding the selected objects, the stroke color must be different from the object's fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.
- **Stroke Style** - The current style of the stroke forming the selected objects displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.
  - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.
  - Ordering - "Ordering" is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of

an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Color Panel (Multi Selection)

The Color panel is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected objects. You have the following options:

- Attribute Selector buttons - Select the node attribute to modify:
  - Text - This option is available only for objects containing text.
  - Line
  - Fill

Group Properties Panel

The Group Properties panel appears when you open the Properties panel while a group of objects is selected on the canvas. It is a sub-panel of the Properties panel. See the following illustration:

Group Properties Panel

The Group Properties panel includes the following sub-panels, each containing sections with settings you can use to modify the grouped objects:

Layout Panel (Group)

Use this panel to modify the attributes of the grouped objects. You have the following options:

- **Width**, **Height** - Use these fields to increase or decrease the size of the selected objects as they appear on the canvas.
- **Left**, **Top** - Use these fields to relocate the selected objects on the canvas. Specify the left and top coordinates. Note that you can also relocate the selected objects by clicking and dragging them on the canvas.
- **Angle (degrees)** - Rotate the selected objects. Do one of the following:
  - Click and drag the slider. The selected objects rotate on the canvas and the number of degrees of the angle updates in the associated entry field.
  - Enter a number of degrees directly into the entry field.
- **Stroke Thickness** - Modify the thickness of the stroke surrounding each of the selected objects. Do one of the following:
  - Click and drag the slider - The stroke thickness changes on the canvas and the thickness in pixels (px) updates in the associated entry field.

    - Enter a number of pixels directly into the entry field.

  Note: To see the strokes surrounding the selected objects, their color must be different from the selected objects' fill color. To change the stroke color, click on the Line Color button In the Color panel, and then select a different color.

- **Stroke Style** - The current style of the stroke forming the selected objects displays below this field. To change the style, click on the current style and select a different style from the style options that appear (for example, solid line or dotted line).

- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.

    - Grouping - To simultaneously perform a function (for example, move or resize) on multiple objects on the canvas, select the objects and then click on the **Group** button. The button is active only if multiple objects are currently selected on the canvas. The **Ungroup** button is active only if one or more object groups are selected on the canvas. If you click on this button when active, all selected groups are ungrouped.

    - Ordering - "Ordering" is the layered placement of an object in relation to other objects on the canvas. An object that is placed on a higher layer will block the view of any portion of an object beneath it. Use the Ordering buttons to arrange the layering placement of overlapping objects on the canvas.

Status Bar

The Status bar appears at the bottom of the page. It displays important information about the workflow canvas and gives quick access to certain tools.

Status Bar

Information Displayed

The following information is always displayed in the Status Bar:

- Current page out of the total number of pages
- Left Coordinate of the last object selected. Note that this defaults to 0 if no object has been selected. This will maintain the last coordinate even if the object has been deleted.
- Top Coordinate of the last object selected. Note that this defaults to 0 if no object has been selected. This will maintain the last coordinate even if the object has been deleted.
- Page size (in measurement units)
- Printer paper size and orientation

Status Bar Tools

The Status Bar also gives users access to certain tools, including:

- **Show Grid** (described in the **View Menu** section above)
- **Snap to Grid** (described in the **View Menu** section above)
- **Zoom** (described in the **View Menu** section above)

Building a Sample Workflow

The Workflow Designer is a cloud-based solution with a complete palette of graphical icons and drawing tools that allow you to create document processing workflows.

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

Workflow Designer

The left side of the window contains palettes. Click on the pushpin to keep a node palette open. The node palettes are divided by their function to **Collect**, **Process**, or **Distribute** documents. In addition, you can favorite nodes, which will cause them to appear in the **My Favorites** palette.

Creating a Simple Workflow

1. To begin, open the Collect nodes palette and click on an **MFP Capture node**. With the node selected, click on the canvas drawing area and drag the mouse to create and size the node. For more information on how to configure the node, visit the **MFP Capture** page.
2. Add a simple Process node for your first workflow, such as **Rename**. For more information on how to configure the node, visit the **Rename** page.
3. Add **Box Connector** as the Distribute node. Use the mouse with the **gridlines and cross-hairs** to line up your nodes. For more information on how to configure the node, visit the **Box Connector** page. Use the **Select/Resize** Select/Resize tool to make any node larger.

   Add Nodes to Your workflow

4. Double-click on the canvas work area to open the Properties panel and name your workflow, as in the following illustration:

   Name your workflow

5. Click on a **Connector tool**. Then, click on the **MFP Capture** node and hold the mouse button down while dragging to the **Rename** node to connect them. Do the same to add a connection between the **Rename** and **Box Connector** nodes.

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

   Create a workflow

6. Select the **Validate** icon (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).
7. Select the **Save** icon (Save icon) or select **Save** from the **File** pull-down menu to save the workflow.
8. Close the workflow.

Note: If you close the window with unsaved changes, a message will appear asking if you would like to save changes to the workflow. If you haven't named the workflow, you will be asked to do so.

Workflow Management

Authorized tenant members can access the Workflow Management page. Depending on your permissions, you can create, share, run, pause, and delete workflows. For example, tenant admins can access all functionality on this page.

The Workflow Management page provides access to the Workflow Designer, where authorized tenant members can create and execute workflows. The Workflow Management page also provides a variety of sample workflows you can use in any way you like, for example to help you become acquainted with the capabilities of workflow management in Dispatcher ScanTrip Cloud .

The Workflow Management page appears when you select Workflows in the Navigation pane:

Workflow Management page

The screen is divided into several sections:

- **Workflow List**
- **Workflow toolbar**
- **Workflow Preview**
- **Workflow Activity Log**

Note: You can adjust the widths of the Workflow List, Workflow Preview, and Activity Log panels to suit your needs. Hover over the space between the panels, and drag the purple bar that appears.

The sections adjust accordingly, within certain boundaries. You can also hide the Workflow Preview, and Activity Log panels, if desired.

Workflow List

The Workflow List panel lists the workflows available to you. Workflows initially appear in the default workflow group, titled **My Workflows**. You can also create your own workflow groups in which to organize your workflows. When you create a new workflow, it becomes associated with the current workflow group. You can move a workflow into any available group.

The Workflow List panel provides information and options for each workflow, including the following:

- **Workflow Status** - Draft or valid.
- **Share status** - Displays the share status of the workflow. To run a workflow on a device, it must be shared with the device. Workflows can also be shared with users and user groups.
- **Name** - Workflows can be renamed only in the Workflow Designer.
- **Actions** - The Actions column provides the following actions for workflows:
    - **Play/Resume** - Starts a selected workflow; resumes a paused workflow.
    - **Stop** - Stops a running workflow. When resumed, the workflow and any files will begin processing from the beginning.
    - **Edit** - Access the Workflow Designer to edit the workflow.
    - **Ellipsis** - This button accesses a menu that provides the following options:
        - **Start/Resume** - Starts a selected workflow; resumes a paused workflow.
        - **Stop** - Stops a running workflow. When resumed, the workflow and any files will begin processing from the beginning.
        - **Pause** - Pause the selected workflow. When resumed, the workflow will continue processing from its current place.
        - **Sharing** - Accesses the Workflow Sharing window.
        - **Change Owner** - Accesses the Change Workflow Owner window.
        - **Edit** - Access the Workflow Designer to edit the workflow.
        - **Copy** - Copy the selected workflow.
        - **Paste** - Paste a copied workflow
        - **Delete** - Delete the selected workflow
        - **Move** - Move the selected workflow to a different workflow group.
        - **Export** - Create a file containing the selected workflow that can be imported to another tenant.

- **Activity Window** - Open the **Logs** for the selected workflow.
- **Attach to Feedback** - Opens the **Customer Feedback** form and attaches the selected workflow.

Workflows display their current run status via a highlighted icon around the relevant button. Options include:

Image	Icon	Description
Running icon	**Running**	The workflow is currently running.
Paused icon	**Paused**	Execution of the workflow is currently paused.
Stopped icon	**Stopped**	Execution of the workflow has been stopped.

Context Menu

The header bar on the Workflow List panel includes a context menu on the right edge, indicated by the Three Dots icon. The menu includes the following options:

Workflow Group Title Bar

- **New Workflow Group** - Create a new workflow group for workflows.
- **New Workflow** - Open the Workflow Designer and create a new workflow in this workflow group.
- **Expand/Collapse** - Display/Do not display the workflows in this workflow group.
- **Rename** - The header bar of any custom workflow group includes an Edit icon, via which you can give the workflow group a new name.
- **Delete** - Custom workflow group include an option to delete the workflow group. Workflows will also be deleted.
- **Shift** - The header bar of any workflow group includes a Shift icon on the left edge, via which you can drag a workflow group up or down in the panel.
- **Paste** - Paste a copied workflow in this workflow group.
- **Export** - Create a file containing the workflow group and all workflows within, which can then be imported to another tenant.

Tool Bar

The Workflows toolbar appears above the Workflow List panel, displaying icons you use to manage your workflows. The icons include:

Icon	Image	Description
Open Icon	Add	Open the Workflow Designer with a blank workflow canvas.
Play Icon	Play	Start the selected workflow.
Pause Icon	Pause	Pause the selected workflow. When resumed, the workflow will continue processing from its current place.
Stop Icon	Stop	Stop the selected workflow. When resumed, the workflow and any files will begin processing from the beginning.
Edit Icon	Edit	Open the Workflow Designer to modify the selected workflow.
Copy Icon	Copy	Copy the selected workflow.
Paste Icon	Paste	Paste a copied workflow.
Delete Icon	Delete	Delete the selected workflow.
Import Icon	Import	Upload a file containing workflows.

Icon	Image	Description
Export Icon	Export	Create a file containing the selected workflow that can be imported to another tenant.
Share Icon	Share	Share workflows with other users.
View Samples Icon	View Samples	Navigate to the Dispatcher ScanTrip Cloud Sample Workflows library.
Search Icon	Search	Search existing workflows.
Show Preview / Hide Preview	Show/Hide Preview	Toggle a view of what the workflow looks like.
Show Logs / Hide Logs	Show/Hide Logs	Toggle a display of the logs for the workflow.

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 **edit** arrow on the folder’s title bar; then type a new folder name in the field that appears, as in the following illustration:

Naming Folders

Save the new folder name by pressing the **Enter** key or by **clicking anywhere** else in the application.

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.
- 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.

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 six dot icon in the upper left corner of the folder into the correct position using your mouse
- Click on the **down** arrow on the folder's title bar; then choose the **Shift** option.

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 on 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.

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 toolbar.
- 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.

Once you enable the options that you are interested in and select the **Export** button, the Export Workflow(s) window will appear. 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

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 ScanTrip Cloud is not running, the application will automatically launch.
- Choose the **Import Workflow** icon from the toolbar 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.

Workflow Preview

If you have the Show Preview option selected, the Workflow Preview will appear to the immediate right of the Workflow list, as in the following illustration:

Workflow Preview

Workflow Activity Log

If you have the Show Logs option selected, the Workflow Activity Log will appear to the right of the Workflow List.

Run a Valid Workflow

If you know the workflows in the list are valid, select a workflow and click the **Play** icon above or the **Run** icon next to it. 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. The **Workflow Activity Log**, in the right pane, will display the workflow steps as they are performed.

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.

Edit a Workflow

If you select a stopped workflow in the list and click on the **Edit** icon, the Workflow Designer so you can make any changes required. Note that you cannot edit a workflow that is currently running; it must be stopped before it can be edited. For more information about editing a workflow, see **Using the Workflow Designer**.

Collection Nodes

Overview of Collection Nodes

Collection nodes gather documents from an external source for processing. Dispatcher ScanTrip Cloud accepts all file types, though individual nodes may have their own limitations. Workflows typically start with a collection node. Collection nodes include:

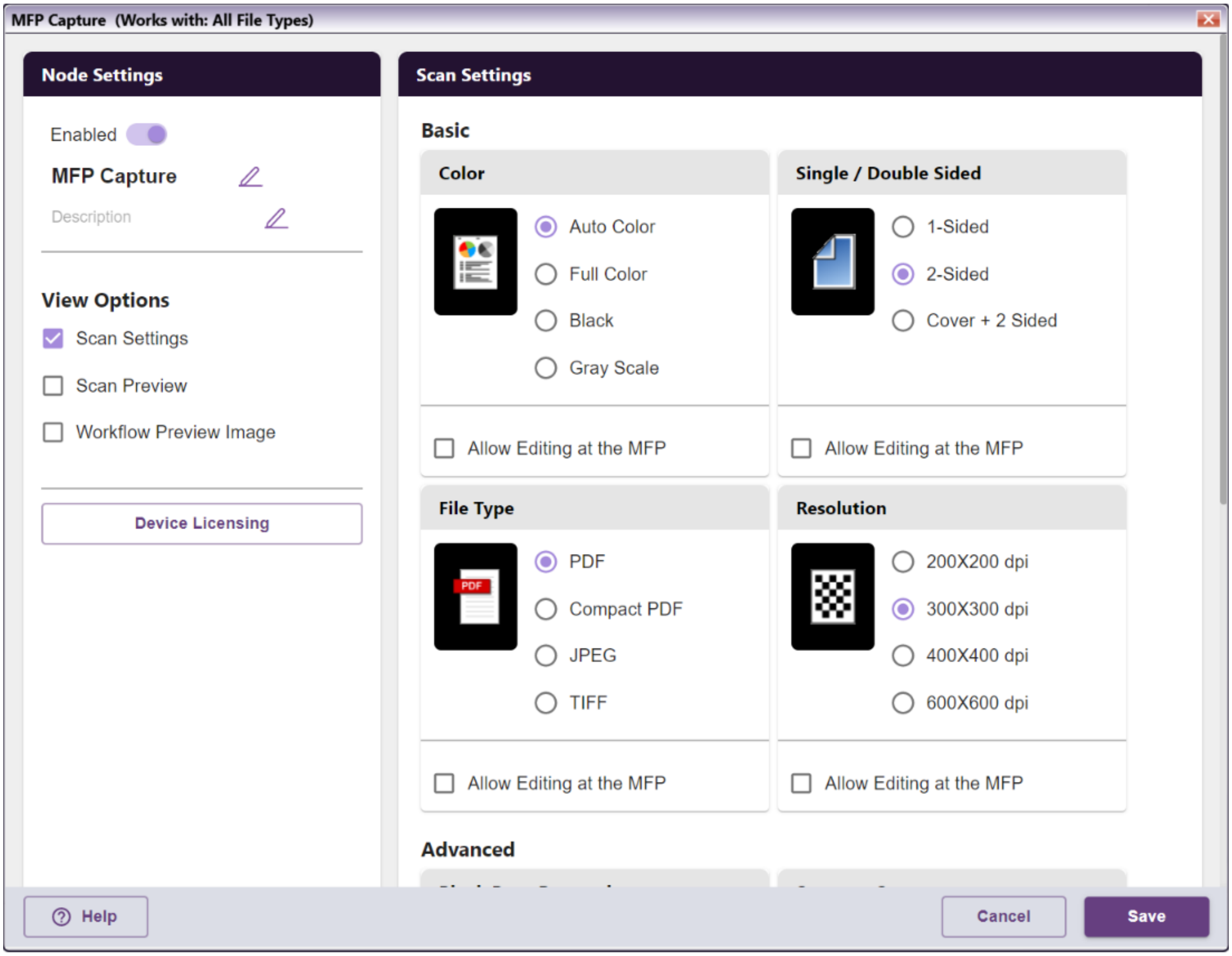
- **MFP Capture** - Collects data and documents from a licensed MFP.

MFP Capture

Dispatcher ScanTrip Cloud can take advantage of Konica Minolta MFP devices with IWS app compatibility. The **MFP Capture** 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 Capture** node.

Important! The MFP Capture node **must** be present and enabled for a workflow to process scanned documents.

To open the **MFP Capture** node's configuration window, add a collection node for MFP Capture to your workflow and double-click on it.



Before Using the MFP Capture Node

Before a workflow with the MFP Capture node can be run successfully, devices must be registered with your tenant and the workflow must be shared with a registered device. For more information, see **Device Management**.

Configuring the MFP Capture Node

- **Enabled** - To enable this node in the current workflow, ensure the **Enabled** toggle is to the right. By default, nodes are enabled upon creation. If you disable the node, and there are no other collection nodes, the workflow will not accept documents and will not pass validation.
- **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 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.

View Options

These options determine what the user sees when accessing the workflow.

- **Scan Settings** - Select this option to display the scan settings to the user.
- **Scan Preview** - Select this option to display a preview of the scanned document to the user.
- **Workflow Preview Image** - Select this option to display a preview of the workflow.

Device Licensing

Click this button to go to the **Device Management** page to add, edit, or remove devices.

Important! To run a workflow with the MFP Capture node, there must be at least one device licensed and shared with the workflow, and there must be at least one user with access to the workflow.

Device Assignment

Click this button to go to the **Sharing** modal.

Important!

- To run a workflow with the MFP Capture node, there must be at least one device licensed and shared with the workflow, and there must be at least one user with access to the workflow.
- The workflow must have been saved at least once in order to share it with users or devices. Clicking the Device Assignment button without saving the workflow will result in an error.

Scan Settings

Within the **Scan Settings** area, there are four basic scan settings and three advanced settings that can be adjusted. Here, you can 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. The settings are:

Basic:

- **Color** - Select the color preference of the scan. Options are **Auto Color**, **Full Color**, **Black**, or **Gray Scale**.
- **Single / Double-Sided** - Select which sides of the document to scan. Options are **1-Sided**, **2-Sided**, or **Cover + 2-Sided**
- **File type** - Select the file type to save the scanned document as. Options are **PDF**, **Compact PDF**, **JPEG**, or **TIFF**.
- **Resolution** - Select the scan resolution. Options are **200x200 dpi**, **300x300 dpi**, **400x400 dpi**, or **600x600 dpi**.

Advanced:

- **Blank Page Removal** - Select whether to keep or remove blank pages from the scan file.
- **Separate Scan** - Select whether the documents will be scanned individually or as part of a multi-pass scan.
- **Document Sizes** - Select whether the scanned documents are of the same size. Options are **All Same Size**, **Same Width**, or **Different Width**.

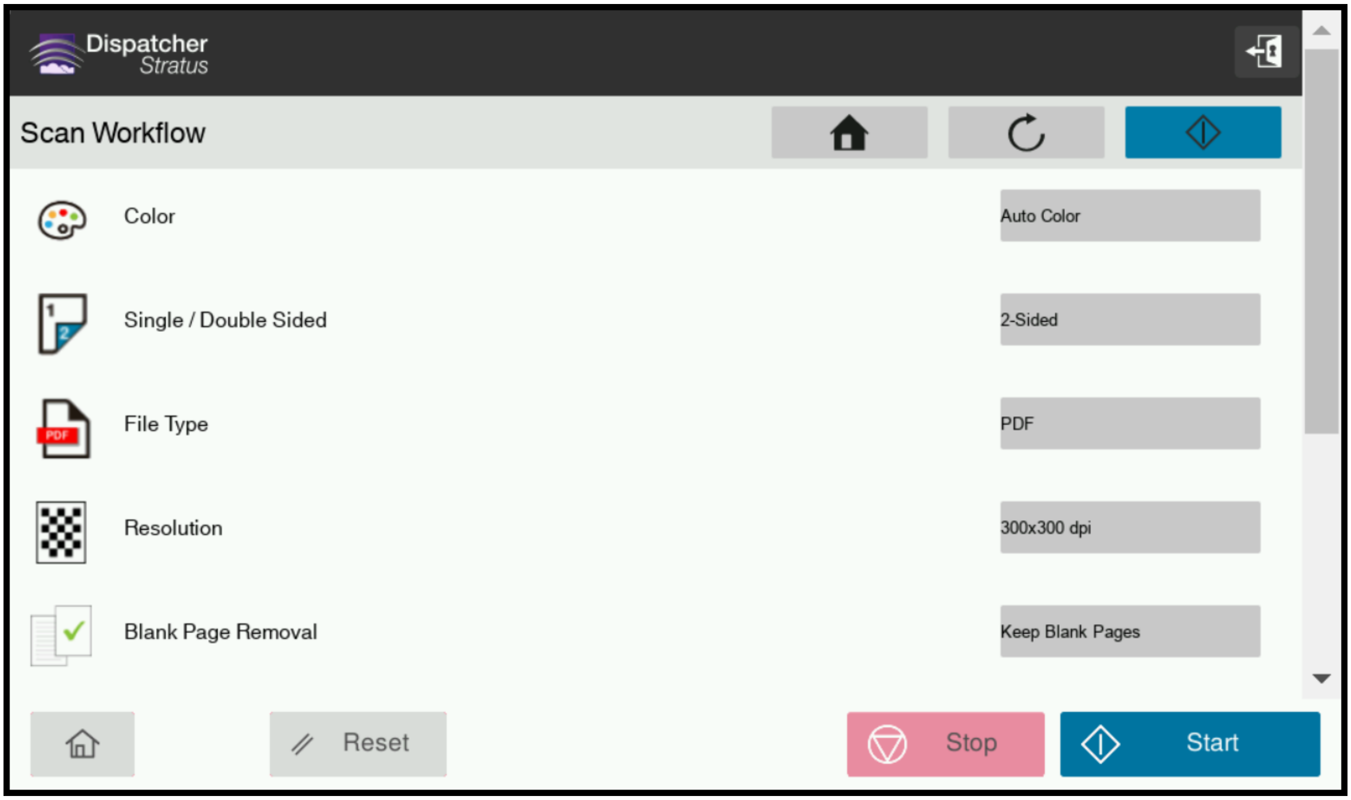
In addition, each setting has a checkbox to allow editing of the setting at the MFP. If the box is unchecked, the user cannot change that scan setting at scan time.

Important! Only MFPs that support the **Dispatcher ScanTrip Cloud app** and have it installed are available for Device Licensing. For more information about which MFPs are supported, see the **MFP Supported List**.

Using MFP Capture at the MFP

On an MFP device, workflows are accessed through the **Dispatcher ScanTrip Cloud app**. At the MFP, take the following steps:

1. **Select your workflow** - If only one 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 your scan settings** - If scan settings have been made editable at the MFP, you can update them at this time.



3. **Select the Scan button** - This will begin the scanning process.

Important! Certain MFPs natively support OCR. If the OCR Language drop-down menu does not populate properly, clear the cache on the MFP.

Process Nodes

Overview of Process Nodes

Process nodes process data collected in a workflow by a collection node. The following process nodes are available for use in the **Workflow Designer**:

Type	Node
Database	**ODBC**
Document Manipulation	**Annotation**
File Conversion	**Convert to PDF**
Forms	**Assign Owner** **Flatten Form** **Form Selector**
Image Processing	**Rename**
Metadata Processing	**Metadata Browsing** **Metadata Route** **Metadata Scripting** **Metadata To File**
OCR	**Advanced OCR**

Supported Files for Imaging Processes

Some imaging processes work on a select number of file types. Dispatcher ScanTrip Cloud supports any image format supported by Windows Imaging Components (WIC). These file formats include the following:

- PDF
- BMP
- GIF
- JPG
- PNG
- TIFF

Notes:

- Since WIC can support additional formats through the use of codecs, Dispatcher ScanTrip Cloud has the potential to support many more image formats. However, these additional file types have not undergone thorough testing for use with Dispatcher ScanTrip Cloud and results may be unpredictable.
- Unsupported file types coming into image processing nodes will produce an error message.

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 renamed with OCR metadata, ensure that a node that outputs metadata is placed before the **Rename** node in the workflow.

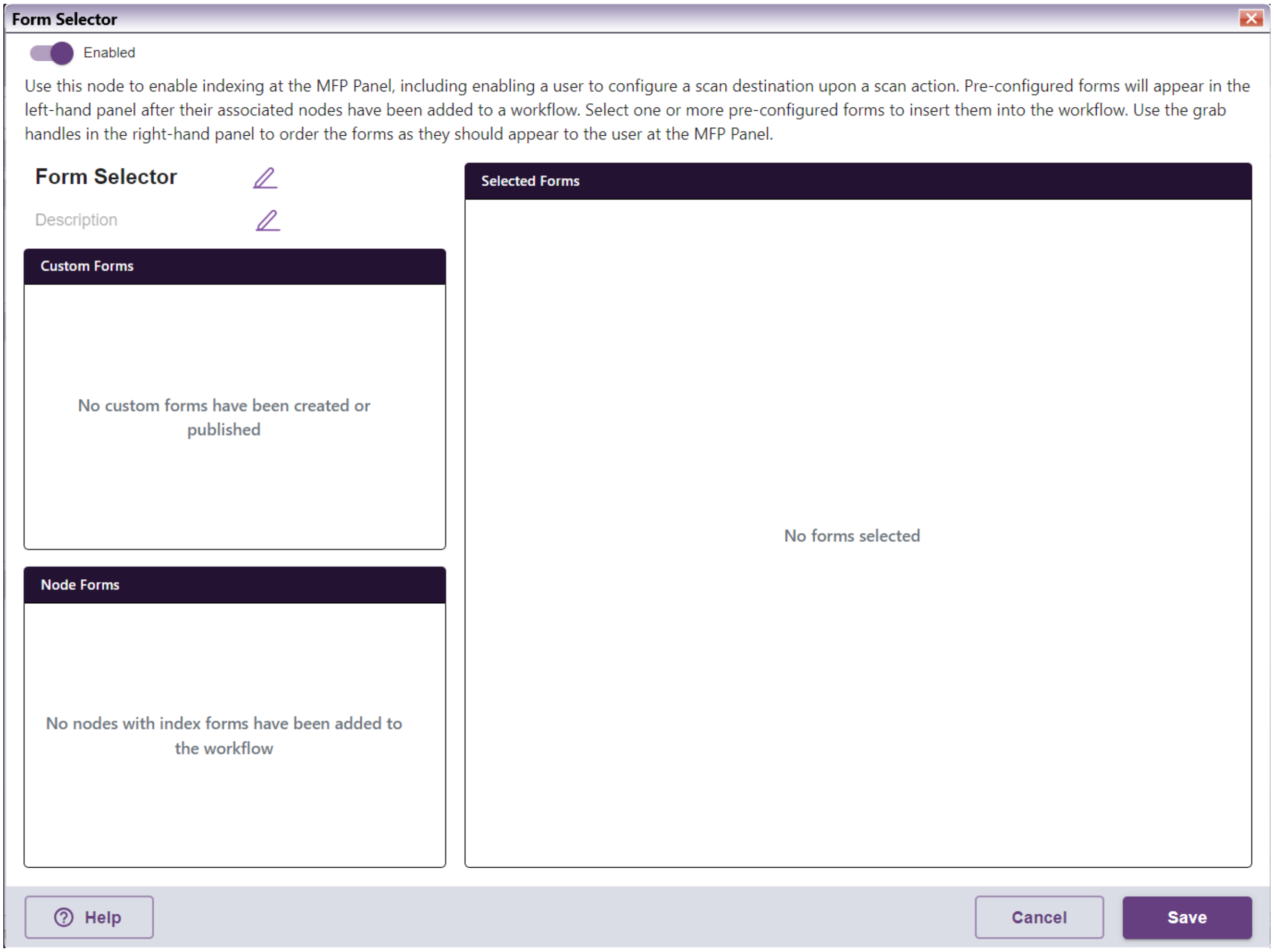
Forms

Form Selector

The **Form Selector** node is used to attach created, interactive forms to workflows in order to allow interaction with otherwise automated processes. Using a form at the MFP Panel, you can enter identifying information about your scanned documents as well as choose additional options, such as conversion formats and specific scan destinations. Within a workflow, the **Form Selector** node can be placed anywhere a process node would be valid.

To open the **Form Selector** node's configuration window, add a Process node for the Form Selector to your workflow and double-click on it.

Configuring the Form Selector



- **Enabled** - To enable this node in the current workflow, ensure the **Enabled** toggle is to the right. 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 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.

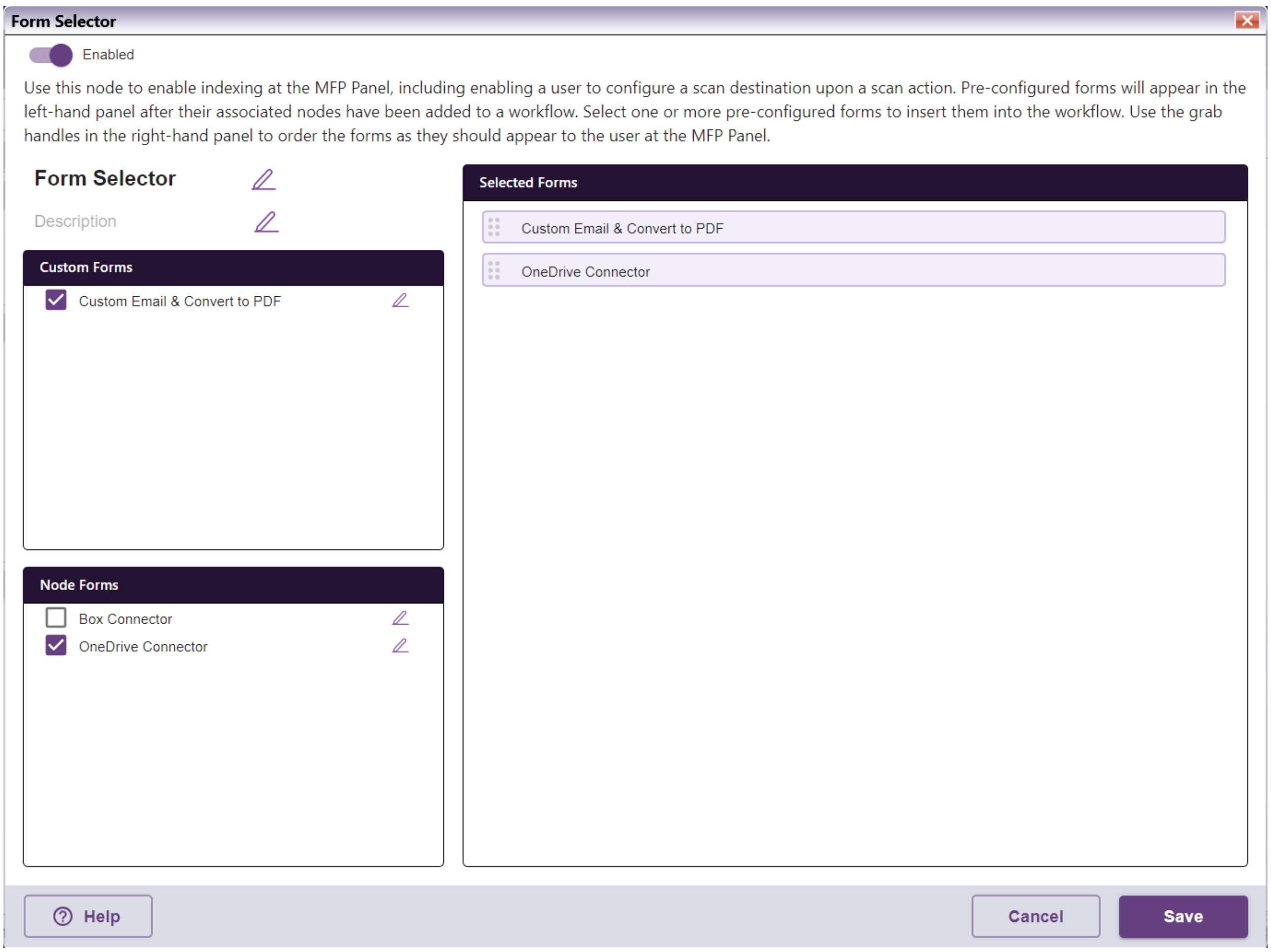
Buttons

- **Help** - To access 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.

Using the Form Selector

In order to configure the **Form Selector** node, you must first have at least one cloud connector node in the workflow or one configured and published **custom form**. The Form Selector node allows users to update workflow configurations at the MFP or other device. To configure the **Form Selector** node, do the following:

1. Available forms appear in the two areas on the left: Custom Forms and Node Forms. The Custom Forms area displays forms that have been created with the **Form Builder**, validated, and published. The Node Forms area displays any cloud connector nodes that have been added to the workflow. Select the form or forms you would like access to when using the workflow. They will automatically populate in the Selected Forms area on the right side of the node window, as in the following illustration:



Notes:

- Forms are added to the Selected Forms area in the order in which they are selected.
- Forms can be edited by selecting the **Edit** icon on the right side of the Node Forms area. This will open the Form Builder or the associated node configuration window.

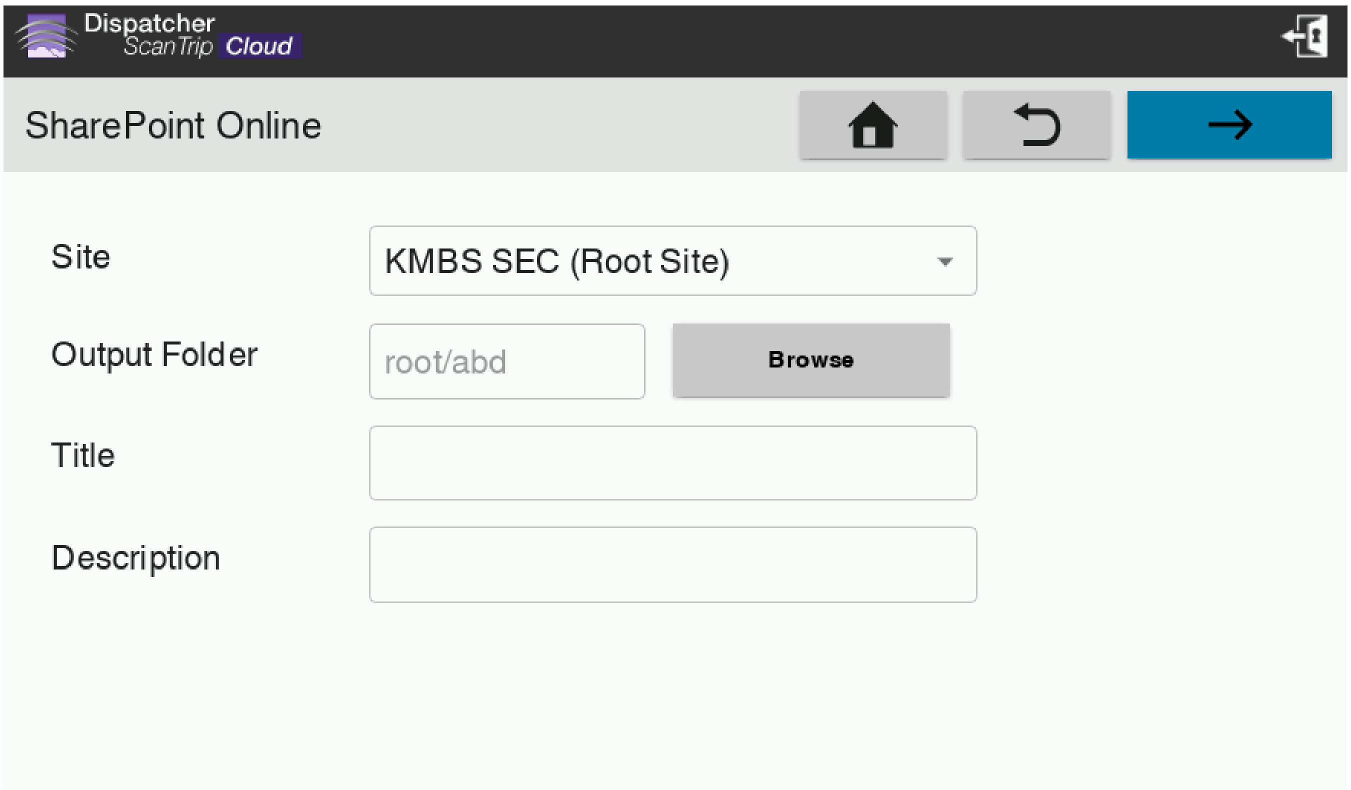
2. In the Selected Forms area, drag and drop any of the selected forms to update the order in which you would like them to appear to a user at an MFP.

3. Select the **Save** button to save the configuration.

Forms at the MFP

After running a workflow with a properly configured Form Selector node, you will be able to use the form at the MFP. The two types of forms display slightly differently at the MFP.

Node Forms

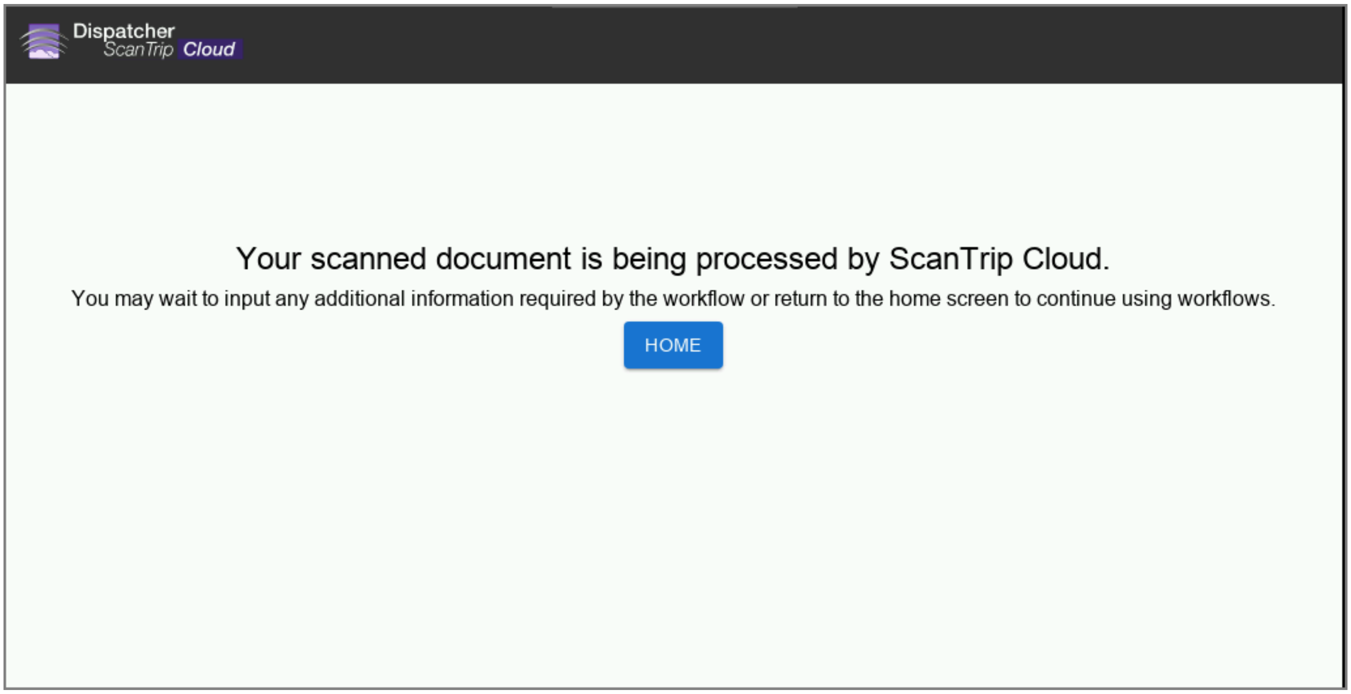


There are several buttons at the top of the screen, including:

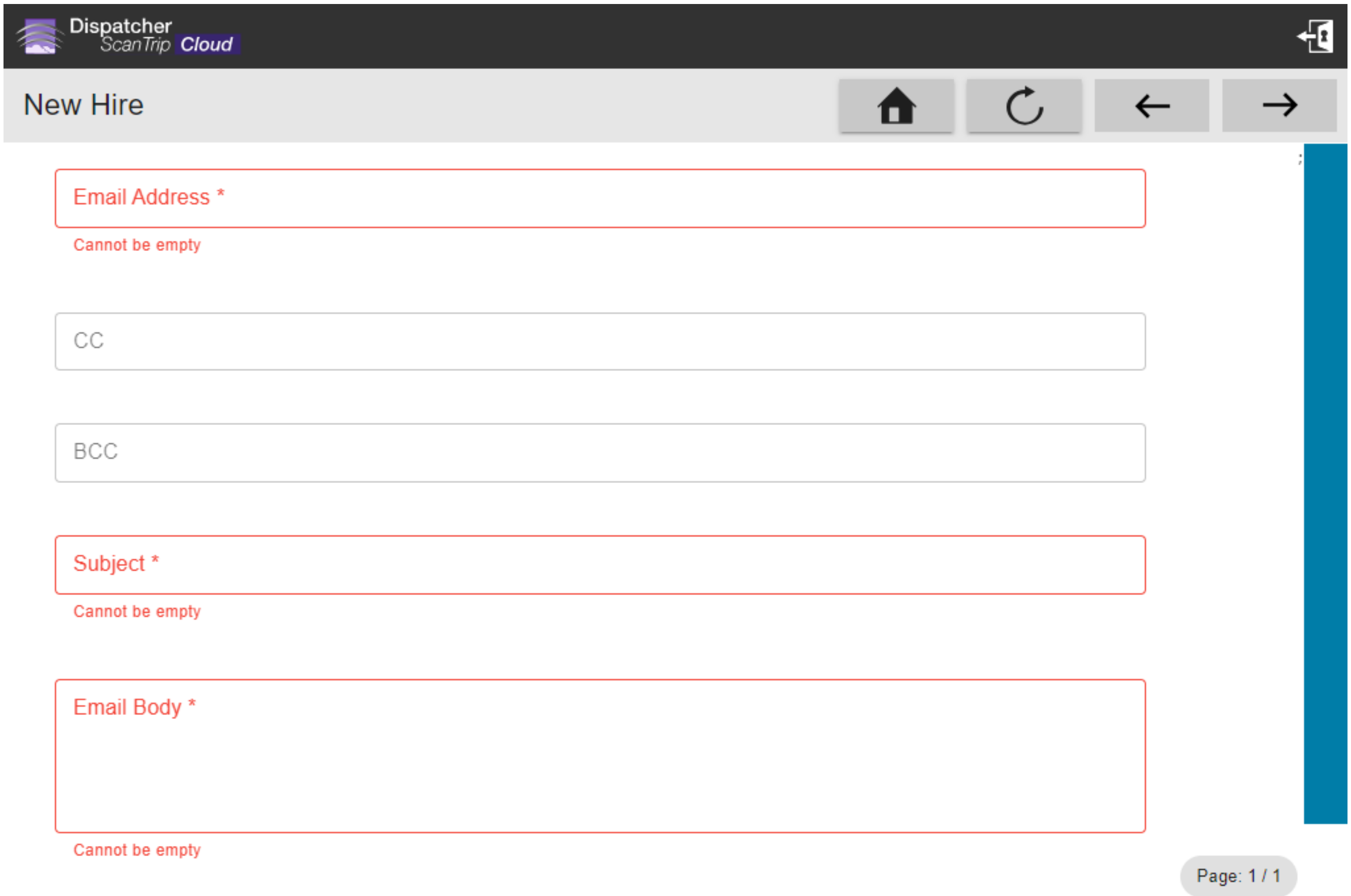
- Home - Leave the current workflow and return to the Home page.
- Back - Return to the account selection page.
- Forward - Move to the next form page. This button will turn blue when a form is able to be submitted.

If a workflow is configured with one or more Process Nodes before the Form Selector, a loading screen will display on the MFP panel before the form. If no more input is required, you may press the **Home** button to return and continue scanning.

Important! If you press the **Home** button or otherwise exit out of the workflow before the form appears, you will not be able to access the form. This may negatively impact document workflows.



Custom Forms



There are several buttons at the top of the screen, including:

- Home - Leave the current workflow and return to the home page.
- Refresh - Return all fields to their default states.
- Back - Move to the previous form page.
- Forward - Move to the next form page. This button will turn blue when a form is able to be submitted.

Required fields are highlighted in red. When all required fields have been filled out throughout all pages of the form, the “Forward” arrow button will become a “Submit” button.

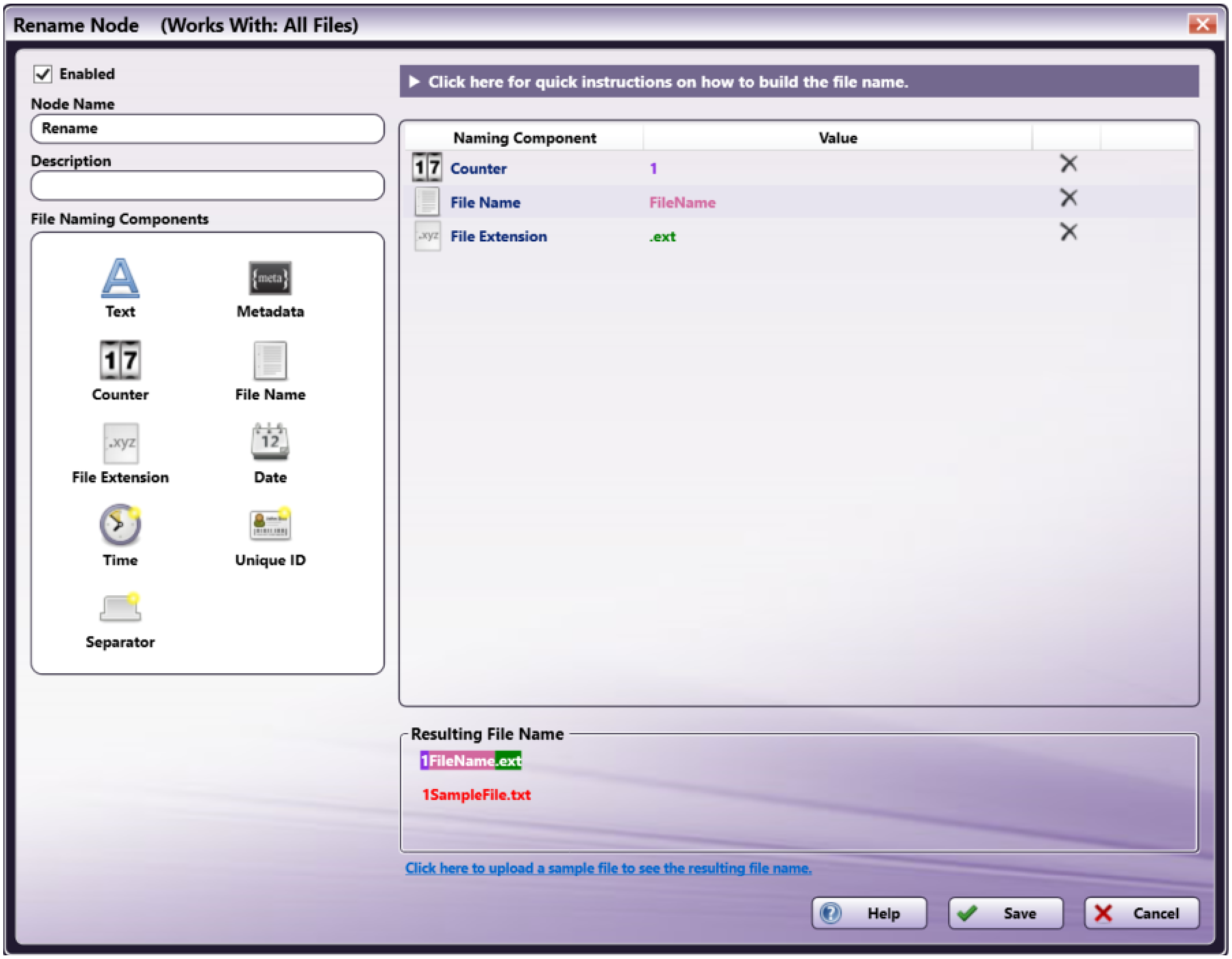
If a workflow is configured with one or more Process Nodes before the Form Selector, a loading screen will display on the MFP panel before the form. If no more input is required, you may press the **Home** button to return and continue scanning.

Important! If you press the **Home** button or otherwise exit out of the workflow before the form appears, you will not be able to access the form. This may negatively impact document workflows.

Image Processing

Rename

The Rename process will change the file name to whatever you define it to be in the Rename Node window. This is particularly useful for ensuring standard document naming practices, clarifying document names, and improving later document retrieval. Documents can be renamed using a set of standard file name elements or with workflow metadata. To open the Rename Node window, add a process node for **Rename** 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** - This editable field contains a default node name that 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 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.

In the **File Naming Components** area, you can customize the following components to rename your files. In order to begin renaming files, you must drag and drop one of the following components into the **File Naming Components** area:

- **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 select 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 (File, User, Workflow, etc.) will appear in the window. On the Metadata Browser, you can do the following:
  - **Expand the list** by selecting the **+** sign next to the metadata that you are interested in. For example, if you are interested in File metadata, click on the **+** sign next to File and the following expandable list will appear:

- **Collapse the list** by selecting the **-** sign next to the appropriate metadata.
- **Choose metadata** to add to the new name by selecting the metadata and selecting the **Select** button. At this point, the Metadata Browser will close and you will return to the Rename window.
- **Search for metadata** by entering the appropriate text string in the empty Search field in the upper right-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 zeros). 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. The following options are available:
    - MM-dd-yyyy
    - M-d-yyyy
    - yyyy-MM-dd
    - MM
    - dd
    - 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. The following options are available:
    - HH-mm-ss
    - h-mm tt
    - HH
    - mm
    - ss

  Note: The Time component defaults to the time zone associated with the Region selected during tenant creation.
- **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 cannot be 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, new files will overwrite old files if they have identical names).
- **File Extension**: Drag-and-drop this icon into the Naming Components area to include the original file extension in the new file name.

Notes:

- It is necessary to include the “File Extension” option in the Rename process if the output files are to be viewed.

- The length of the file name cannot exceed 255 characters (a Windows limit).

In the **Resulting File Name** area, view an example of the file name 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 at the bottom of the Preview area.
- To delete already defined naming components, select the **Delete** (**X**) icon next to the component you would like to remove.

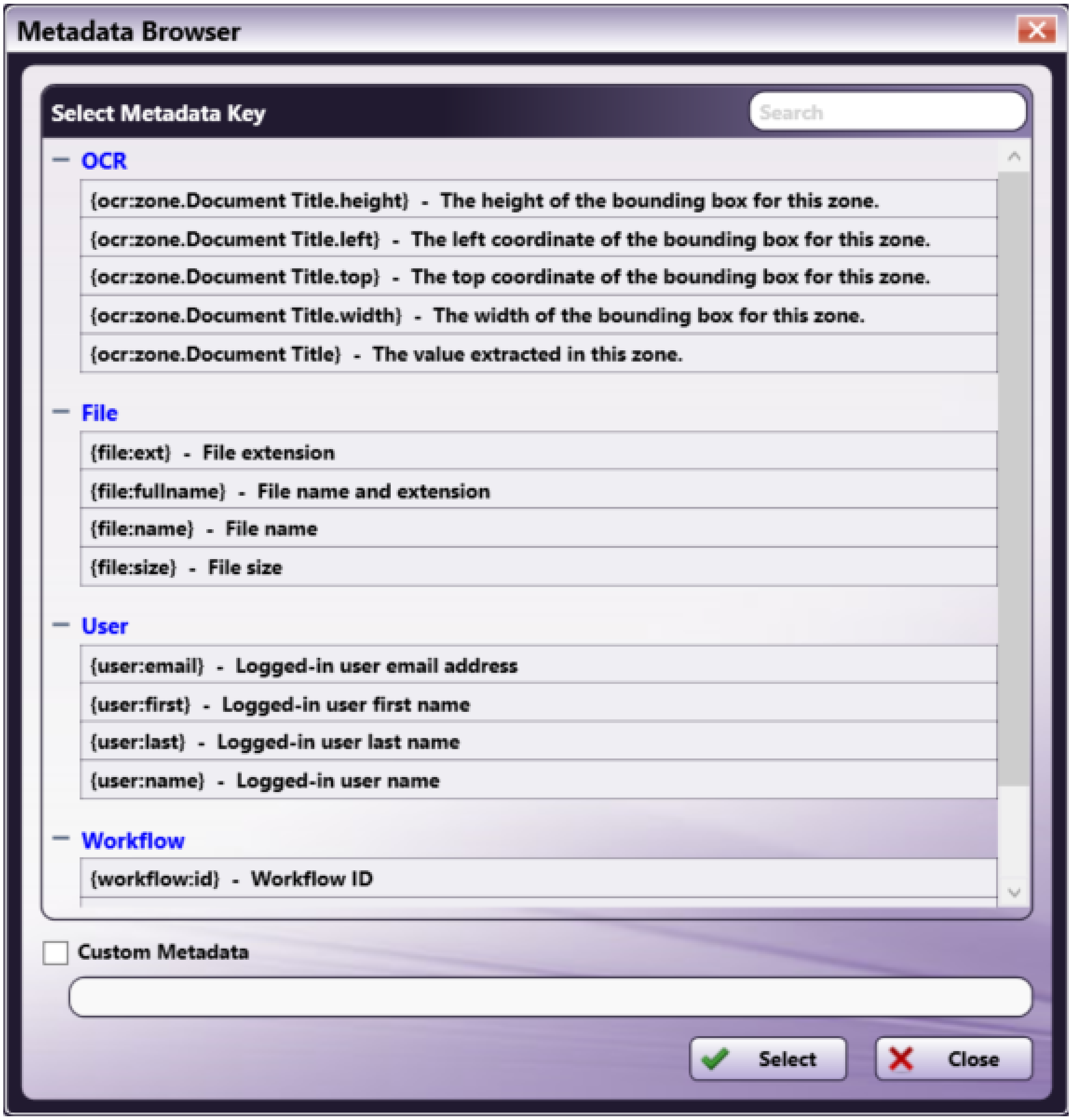
Metadata Processing

Metadata Browsing

The Metadata Browser is a collection of all the metadata keys generated by the workflow. Metadata keys are grouped by the node or feature that generated them. These keys can be selected and added to certain fields within a workflow. For example, an **Advanced OCR** may be configured to extract an email address, which can then be used in the “To” field in the **Email Out** node.

Specifying Metadata Values 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 appears, listing all of the metadata available, categorized by what generated the Metadata Key, as shown in the following illustration:



On the Metadata Browser, you can do the following:

- **Expand the list** by clicking on the **+** sign next to the Metadata Key that you are interested in. For example, if you would like to see OCR Metadata Keys, click on the **+** sign next to OCR and the expandable list in the above illustration will appear.
- Depending on where you opened the Metadata Browser from, you can select or drag-drop Metadata Keys into fields within the node.
- **Search** for metadata by entering the appropriate text string in the empty Search field on the right-hand side of the window.

Extracting Metadata Generated in Dispatcher Phoenix

The **Collect from Dispatcher Phoenix node can import metadata** from Dispatcher Phoenix workflows into Dispatcher ScanTrip Cloud . However, note the following:

- 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 window. Instead, 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.
- 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.

Differences in the Metadata Browser

The contents of the Metadata Browser window can vary based on how you access it. These differences fall into two main categories: Basic vs Custom and Processing vs Distribution.

Basic vs Custom Metadata Browser

The Metadata Browser can be accessed two ways:

- By clicking on the **Metadata Browser** button in the bottom-left corner of the Node Properties Window. This opens the most basic version of the Metadata Browser, which displays a list of Metadata Keys available.

- By clicking on the **Select Metadata Key** drop-down in the **Metadata Route** node or by dragging and dropping a Metadata File Naming Component and clicking on the **Select Metadata Key** drop-down in the **Rename** node. This opens the **Metadata Browser** with the additional Custom Metadata checkbox and field at the bottom. The Custom Metadata field allows you to type in your desired Metadata Key instead of choosing from the list of available Metadata Keys.

Metadata Browser Syntax

Dispatcher ScanTrip Cloud nodes use two versions of Metadata Value syntax, one for Processing nodes and one for Distribution nodes. The Metadata Browser will display the syntax usable for the node you access it from. For example, if you open the Metadata Browser from the **Metadata Route** node, it will display the correct syntax. However, if you attempt to copy a Metadata Key from the Metadata Route node to the **Box Connector**, the Metadata Key will not work in the Box Connector.

Processing Nodes

In Processing nodes, the syntax for Metadata Value takes the following form:

```
{ocr:zone.Title}
```

Note: For Processing nodes, the Metadata Keys will display in this order:

- Zone Height Value
- Zone Left Side Position

- Zone Top Position
- Zone Width Value
- Zone Value

Distribution Nodes

In Distribution nodes, the syntax for Metadata Value takes the following form:

```
{file:ocr["zone.Title"][0].value}
```

This syntax allows for additional information to be extracted from certain Metadata Keys.

Note: For Distribution nodes, the Metadata Keys will appear in this order:

- Zone Value
- Zone Height Value
- Zone Left Side Position
- Zone Top Position
- Zone Width Value

Form Metadata

When accessing metadata generated from a form, it follows this syntax:

```
{form:firstName}
{form:lastName}
```

If there are multiple forms within a workflow, metadata is displayed for all of them as `{form:xxxxxx}`. To ensure that there are no duplicate metadata values, the metadata needs to be modified with the number of the form in order to accurately associate with the correct metadata keys `{form[0].xxxxxx}`.

Example Form Metadata

You have a workflow with two forms. The forms have the following metadata keys:

Form 1:

```
{form.firstName}
{form.middleName}
{form.lastName}
```

Form 2:

```
{form.firstName}
{form.company}
```

```
{form.address}
{form.contactPhone}
```

In the Metadata Browser, you can drag and drop any of those metadata keys into a node. To ensure they are pulling the correct information, you will need to add `[Form Number]` to the metadata, using the following syntax:

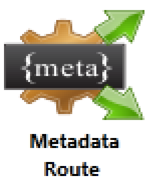
Form 1 Metadata:

```
{form[0].firstName}
{form[0].middleName}
{form[0].lastName}
```

Form 2 Metadata:

```
{form[1].firstName}
{form[1].company}
{form[1].address}
{form[1].contactPhone}
```

Metadata Route



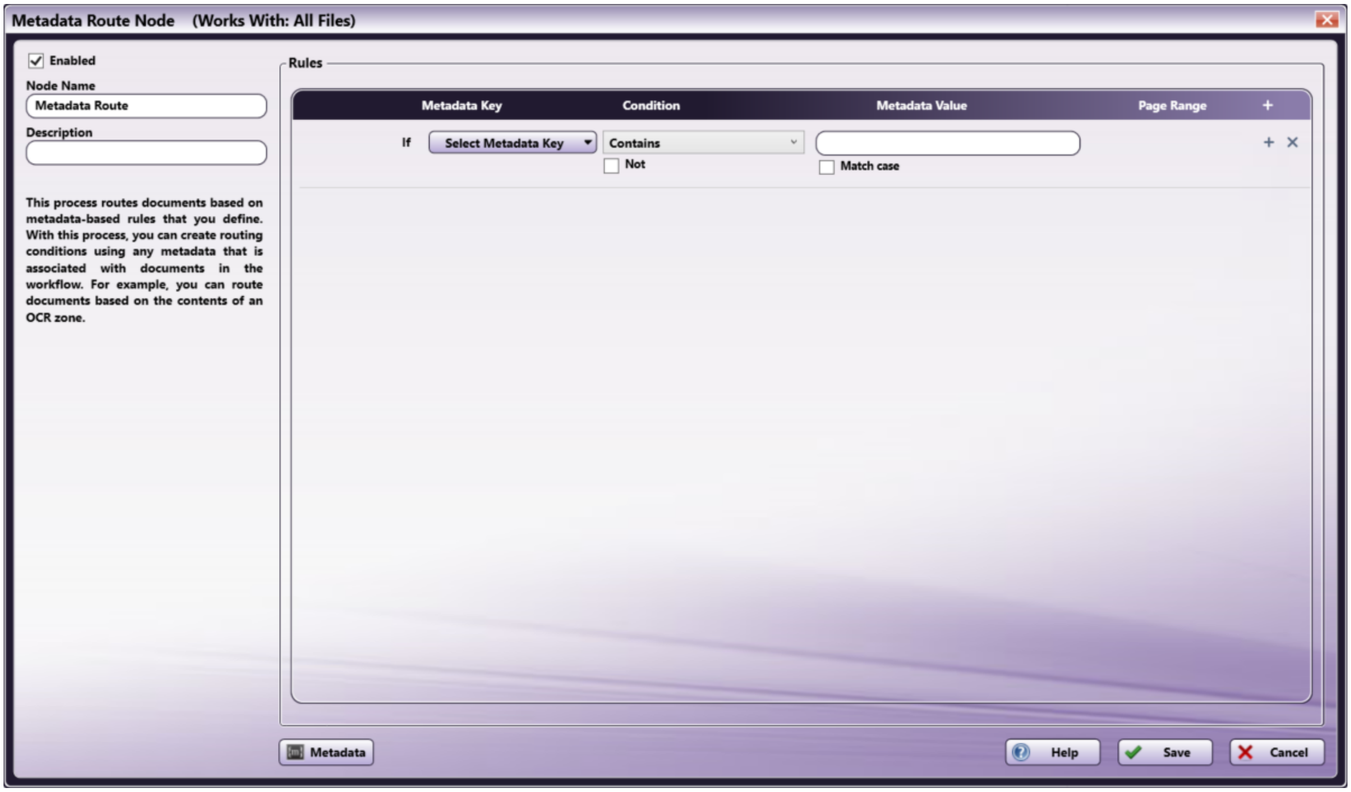
The **Metadata Route Node** routes documents according to metadata-based search rules defined by the user. With this process, you can create routing conditions using any metadata that is associated with documents in the workflow. For example, if an **Advanced OCR** node has been added to the workflow, you can search for any of the scanned zones that were defined. 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’s configuration window, add a **Metadata Route** process node to your workflow and double-click on it.

Configuring the Metadata Route Node

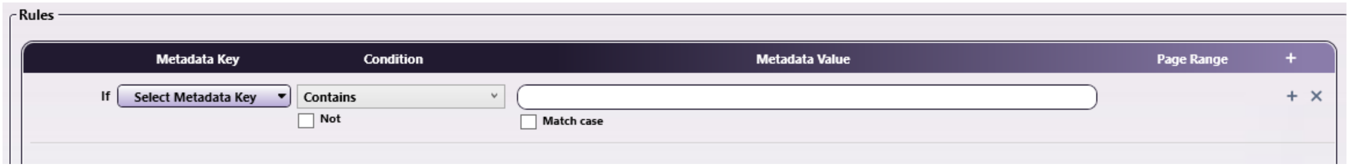


- **Enabled** - To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The 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 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 Rules

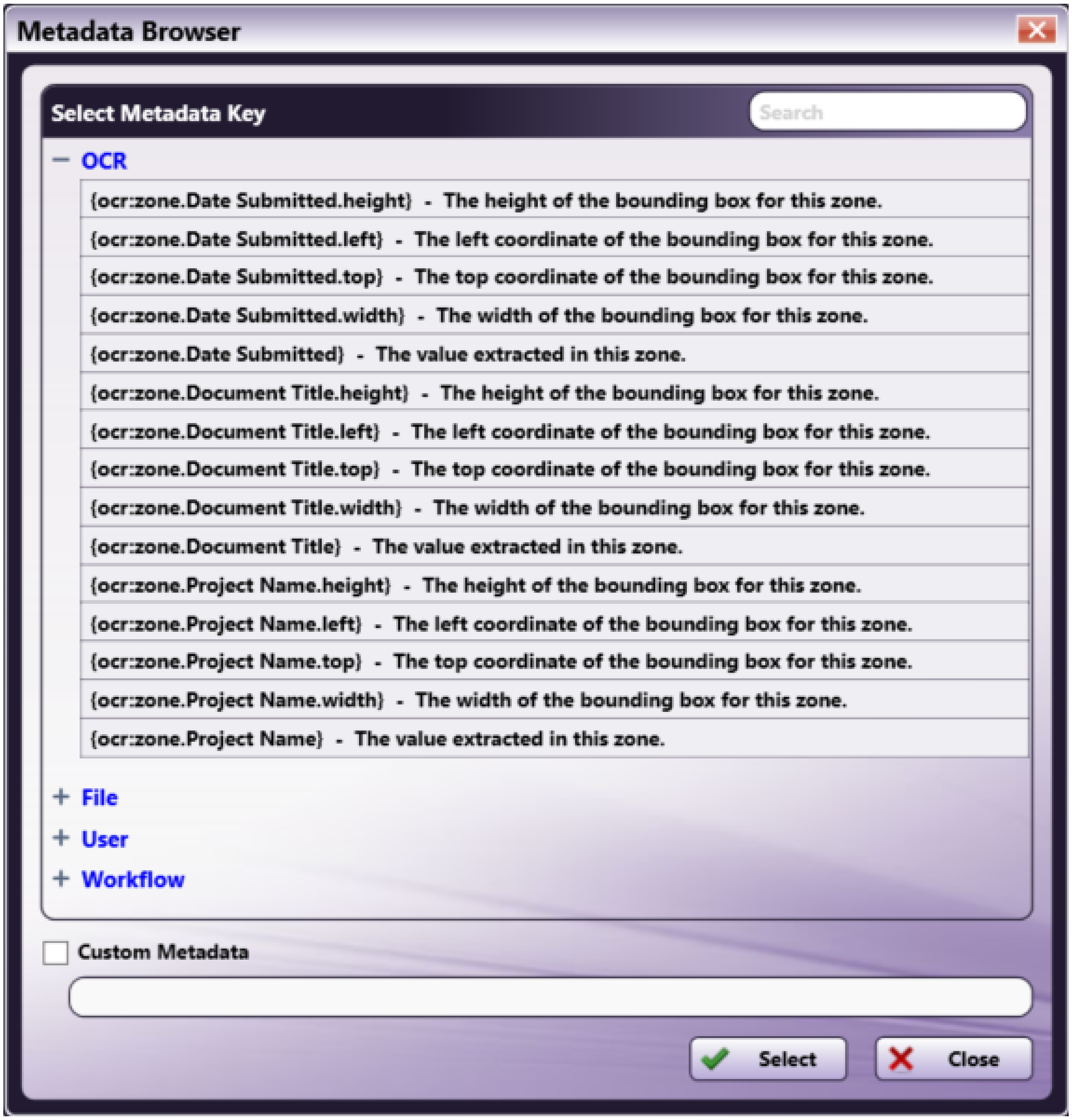


To set up a metadata rule, do the following:

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. 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 OCR metadata, click on the **+** sign next to OCR 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 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.
- **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

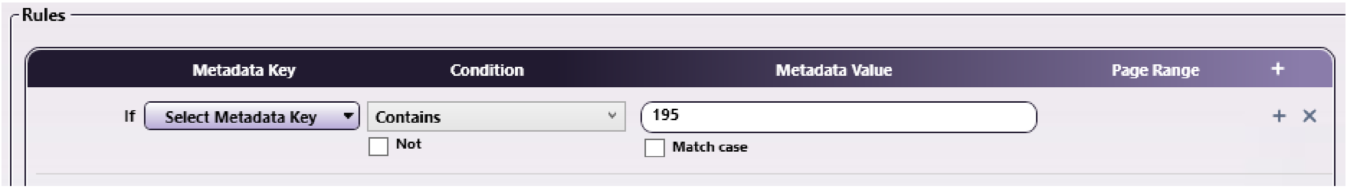
Next, do the following:

- Specify a **Condition** from the drop-down menu. Options are:

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. Note that **Match case** is not available for all Metadata Keys.
- 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:

- 21.000000000000001 (17 significant digits) will round to 21.00000000000000 (16 significant digits)
- 21.000000000000009 (17 significant digits) will round to 21.00000000000001 (16 significant digits).

Step 3: Specifying Metadata Values 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.
- **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. More information about Regular expressions can be found on **this reference page**.

Note: For more information about using the Pattern Matching Tool, see the **Pattern Matching Tool** section below.

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:

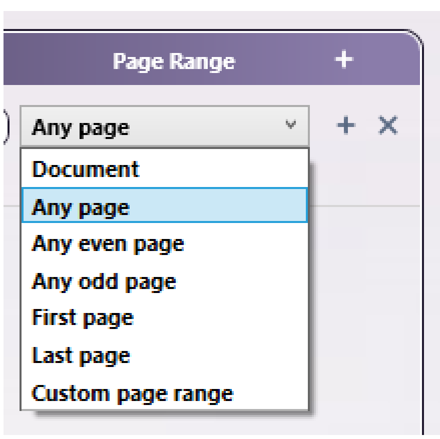
2. Click on the **Browse Patterns** button to open the Pattern Matching Tool.

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.
- **Custom page range** - Apply the rules 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, to specify pages 1, 2, 5, 6, and 7, enter:

      ```
      1, 2, 5-7
      ```

    - Specify a specific sequence within a range of pages by using parentheses. For example, to specify every third page from pages 1 to 10, enter:

      ```
      1-10(3)
      ```

    - Specify the last page by using ‘end.’ For example, to specify pages 15-20 of a 20-page document, enter:

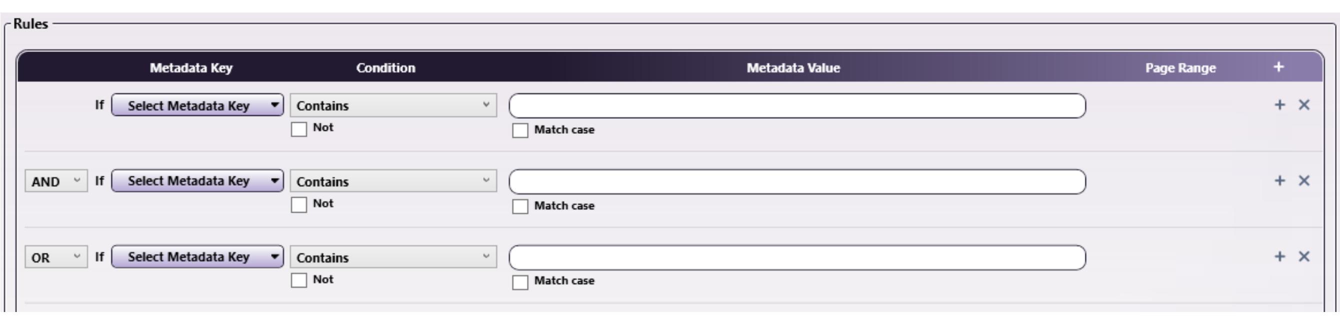
      ```
      end(-5)-end
      ```

  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.

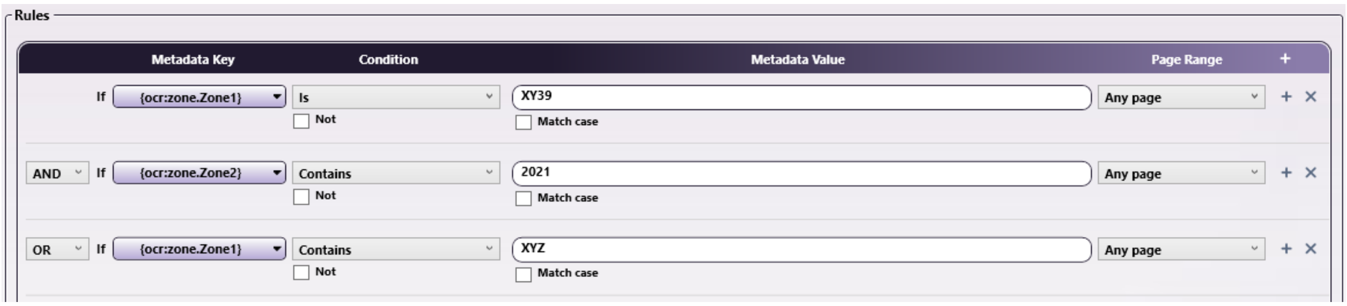
  ▶ Click here for more examples

Setting Up Multiple Rules

The **Metadata Route** node supports multiple rules. Add a new rule by selecting the ( ) icon in the upper-right hand corner of the node. When using multiple rules, they can be combined by selecting the **AND** and/or **OR** from the drop-down menu that appears on the left-hand side of any rules beyond the first, as in the following illustration:

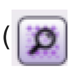


Note: When using multiple rules, the node processes **AND** rules before processing **OR** rules. Any rule with **AND** selected will combine with the row above to form a single validation event. For example, in the following illustration, the node will check to see if the metadata for zone 1 is “XY39” and if the metadata for zone 2 contains “2021”. If both are true, the document will be routed along the “Yes” path. 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” path. If either of the **AND** rules *and* the **OR** rule is false, the document will be routed along the “No” path.

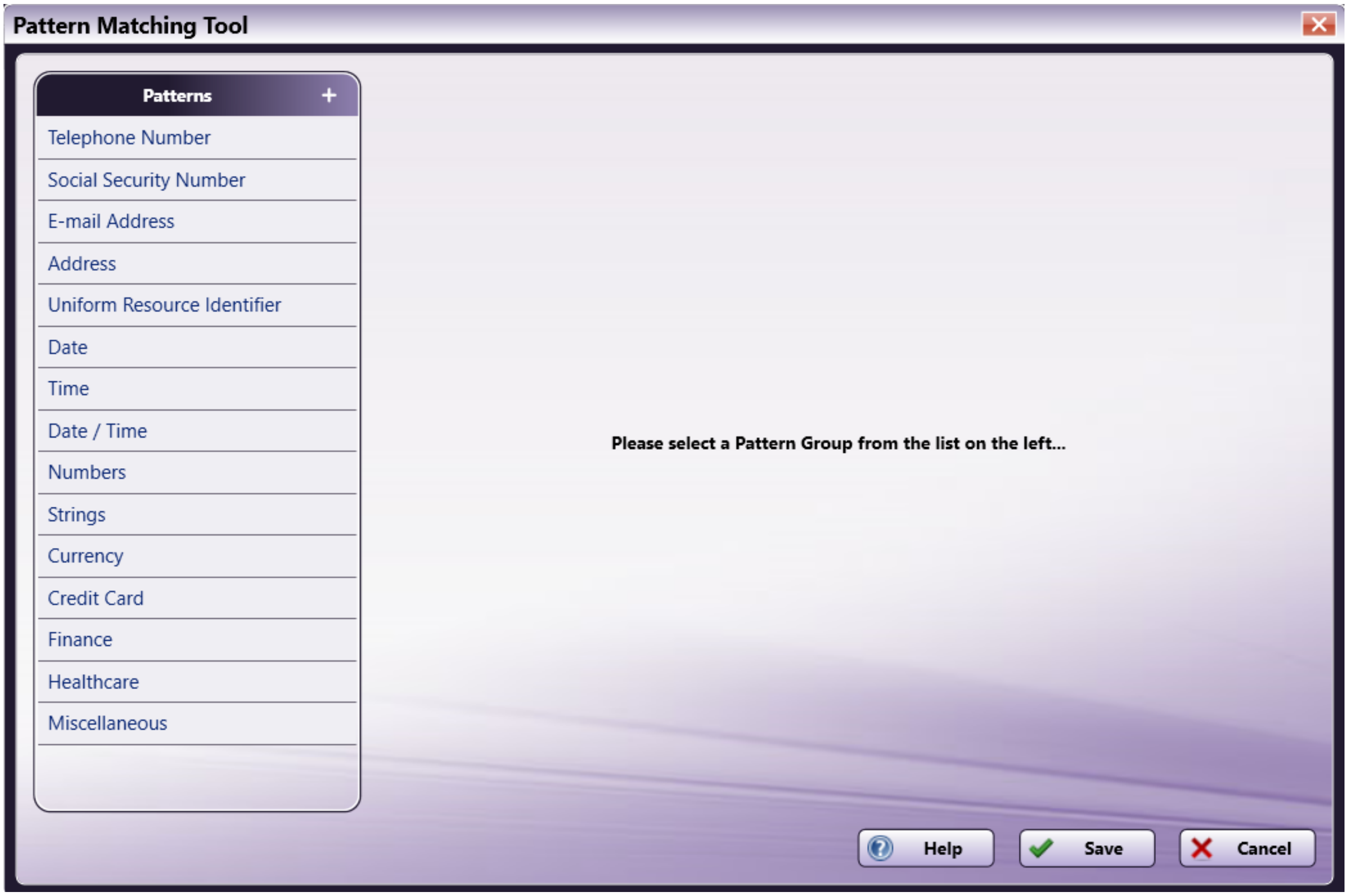


Pattern Matching Tool

The **Pattern Matching Tool** allows you to search a document for a pattern of characters, rather than a specific value. Common patterns include Social Security Numbers (SSNs), phone numbers, dates, zip codes, and credit card numbers. To use patterns in your advanced search, do the following:

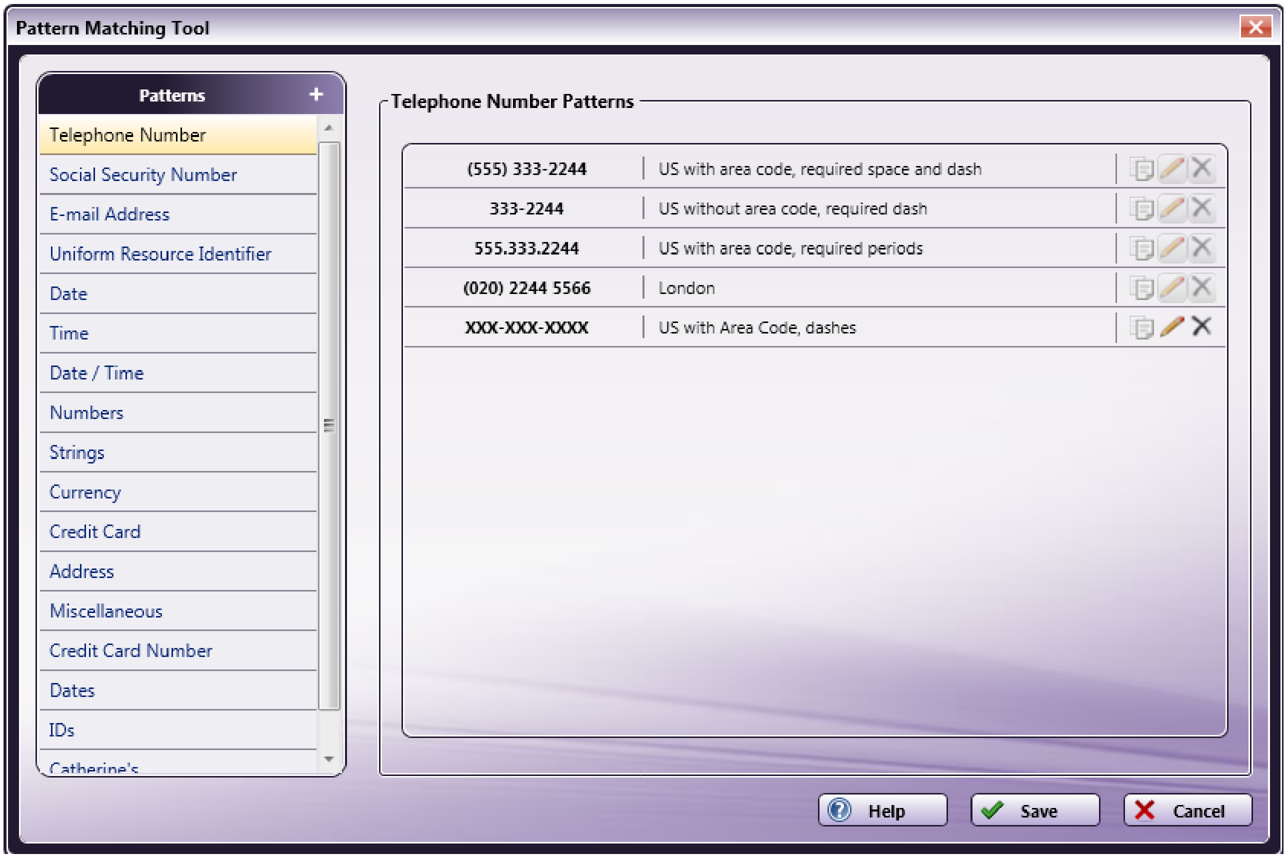
1. Choose **Regular expression** from the **Condition** drop-down list.
2. Select the **Browse Patterns** button ()that appears in the Metadata Value field area.

The Pattern Matching Tool opens, as in the following illustration:

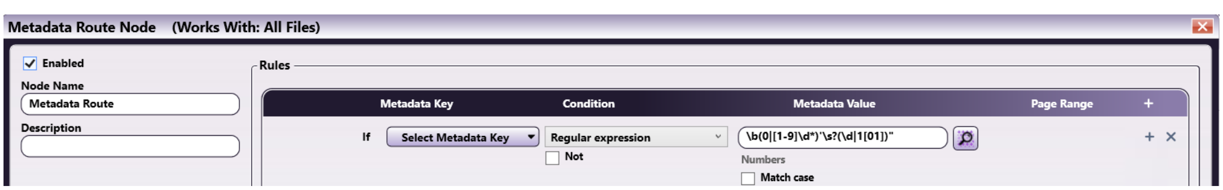


On the Pattern Matching Tool, groups of predefined patterns are listed in the Patterns area on the left-hand side of the window. You can do the following:

- To view the patterns within each group, select a specific category. The patterns will appear in the content area on the right-hand side of the window. For example, Telephone Number Patterns may resemble the following illustration:

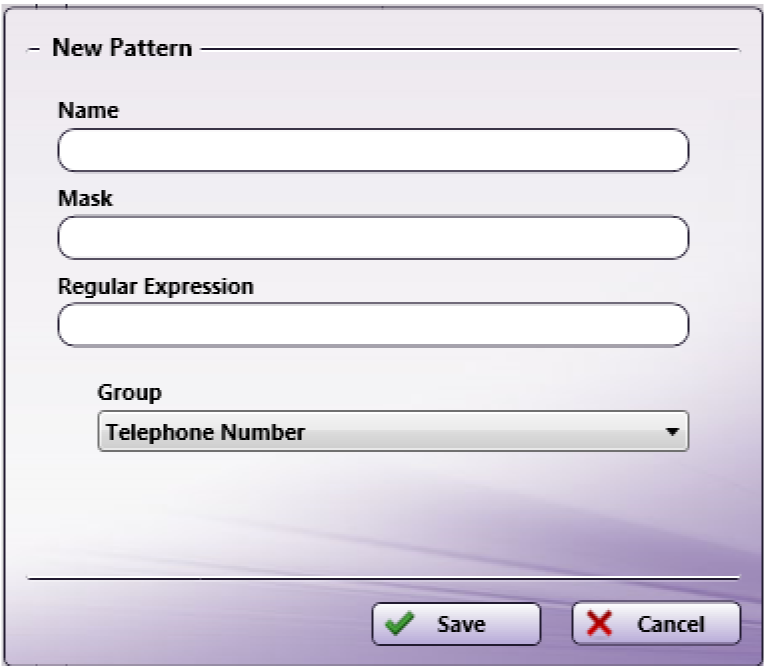


- To add a pattern to the Metadata Route node, do the following:
    - Select a category from the **Patterns** list in the Pattern Matching Tool.
    - Select the pattern that you are interested in.
    - Select the **Save** button.
    - The Pattern Matching Tool will close and the regular expression associated with the pattern will appear in the Metadata Route node's **Metadata Value** field, as in the following illustration:



Creating a New Pattern

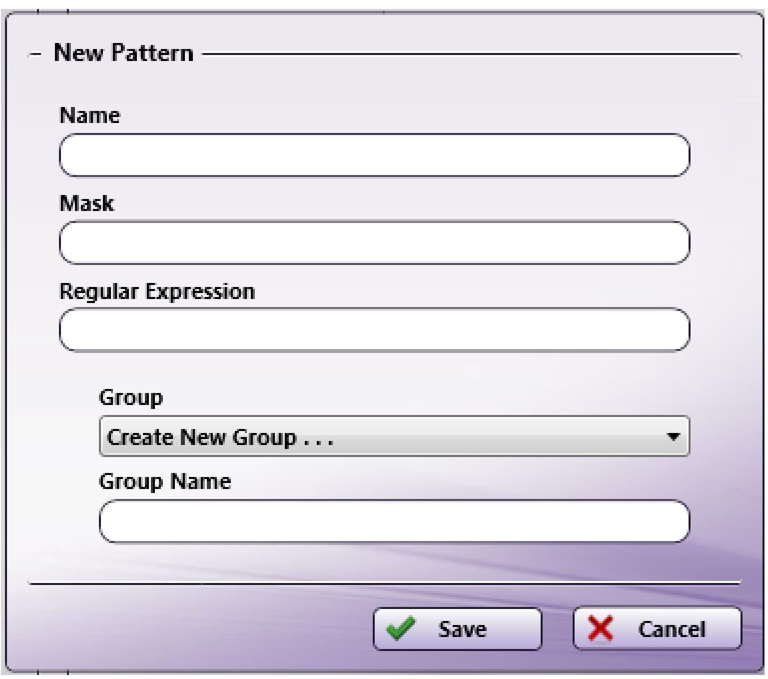
To create a new pattern, click on the + button in the Patterns area. The New Pattern window will appear, as in the following illustration:



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. The mask is an example pattern value that will be detected by the regular expression. For example, “XXX-XX-XXXX” is one possible mask for a Social Security Number.

4. In the **Regular expression** field, enter the regular expression for the new pattern.

5. Select the **Save** button when you are done.

The new pattern will then appear in the 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 name for the new pattern in the **Name** field.

4. Enter 1-XXX-XXX-XXXX in the **Mask** field

5. Enter 1-\d{3}-\d{3}-\d{4} in the **Regular expression** field.

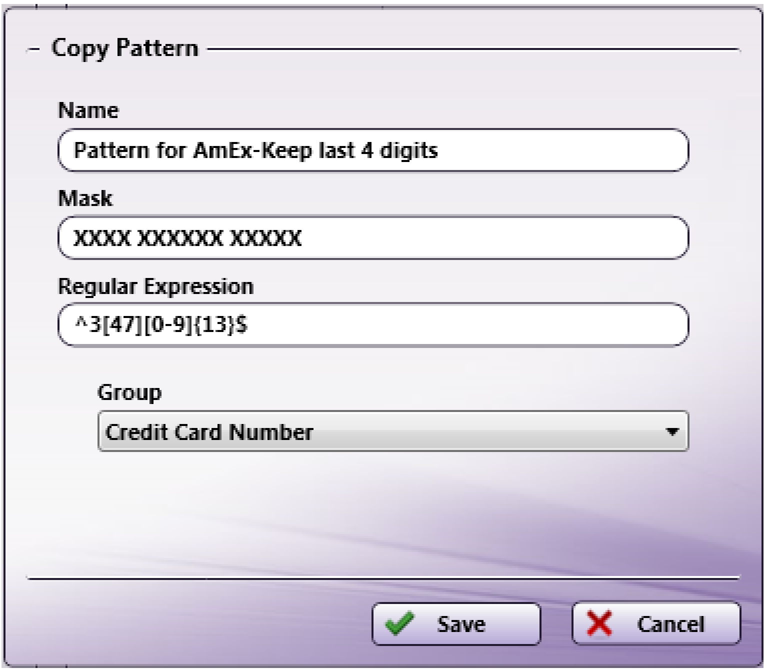
6. Select the **Save** button.

Working with Patterns

Each pattern listed in the Pattern Matching Tool window includes 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.

Copying Patterns

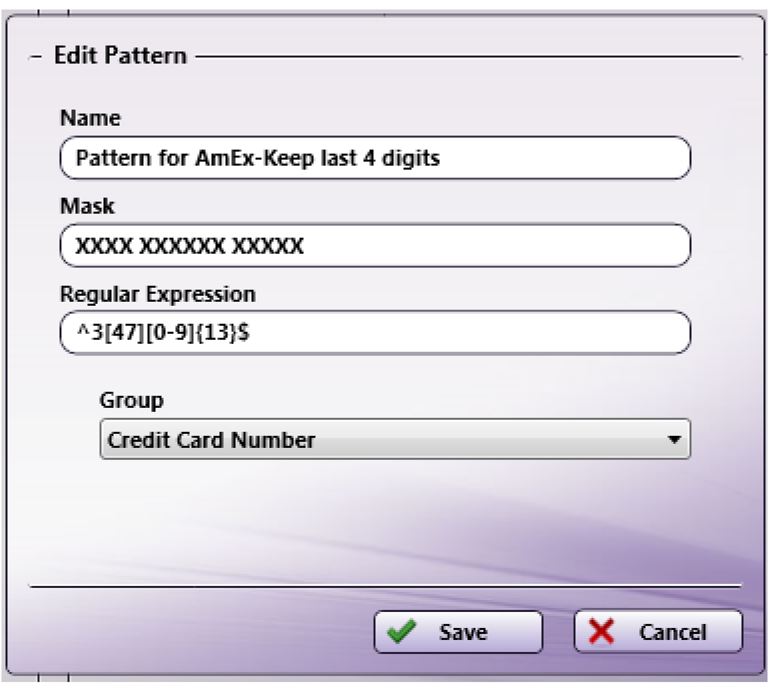
To copy patterns, click on the **Copy Pattern** icon next to the pattern you are interested in copying. The Copy Pattern window will appear, as in the following illustration:



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:



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.

Metadata To File

Use the Metadata to File process node to extract metadata from incoming files and jobs and store that information in a separate file. You can output to a variety of metadata file formats to fit your own specific needs.

For each Metadata to File node you add to a workflow, you specify the following:

- The type of file in which to store that information.
- The format of the new metadata file’s extension.
- Whether to output the original file.

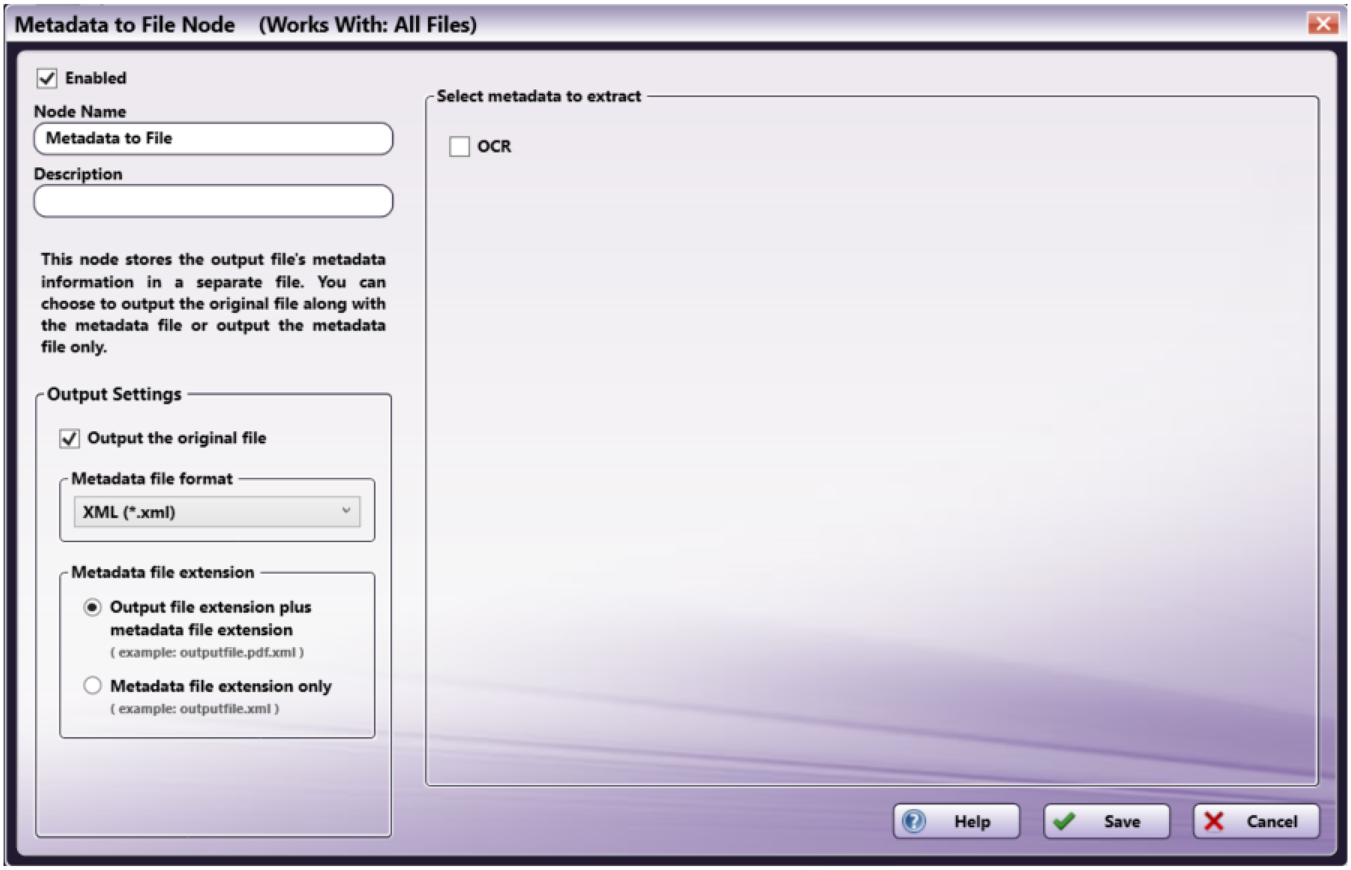
The newly-created metadata file is often used for:

- Record keeping .
- Import into other systems for search purposes.
- Routing to other nodes in a Dispatcher workflow.

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. By default, this box will be checked. If you uncheck this box, the workflow ignores the node and documents pass through as if the node was not present, and the node will display with a red X in the workflow. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - This editable field contains a default node name that 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 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, uncheck this box. By default, this box will be checked.
- **Metadata file format** - Choose the format of the file you want to store the metadata. You have the following options:
    - XML (Extensible Markup Language)
    - INI (Initialization)
    - CSV (Comma-Separated Values)
    - JSON (JavaScript Object Notation)
- **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 this option is enabled and you chose to create an INI file, if the node processes a file named "123.TIFF", the newly created metadata file would be "123.TIFF.INI".
    - **Metadata file extension only** - This option includes the metadata file's file extension only. For example, if this option is enabled and you chose to create an INI file, if the node processes a file named "123.TIFF", the newly created metadata file would be "123.INI".

  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 sets you want to extract to a separate file.

Extracting Metadata Generated in Dispatcher Phoenix

The **Collect from Dispatcher Phoenix node can import metadata** from Dispatcher Phoenix workflows into Dispatcher Dispatcher ScanTrip Cloud . However, note the following:

- At this time, only file-level and page-level metadata is passed between Dispatcher ScanTrip Cloud and Dispatcher Phoenix.
- When sharing metadata between Dispatcher Phoenix and Dispatcher ScanTrip Cloud , metadata keys generated by one system will not be available for selection in the other system's Metadata to File node. Instead select "Custom" at the Metadata File Format field, then create a custom Lua script to export the metadata.
- Metadata keys generated in Dispatcher Phoenix and collected by Dispatcher ScanTrip Cloud must be manually edited in Dispatcher ScanTrip Cloud for use in workflows. Conversely,

metadata keys flowing from Dispatcher ScanTrip Cloud do not need to be modified in Dispatcher Phoenix.

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.
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:

```
[file]
name=sample-file.pdf
size=205491
ctime=0
mtime=1622651543

[group]
metadata-variable-name1=metadata-value1
metadata-variable-name2=metadata-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,"metadata-value1"
group,metadata-variable-name2,"metadata-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"
}
}
]
}
```

OCR

Advanced OCR

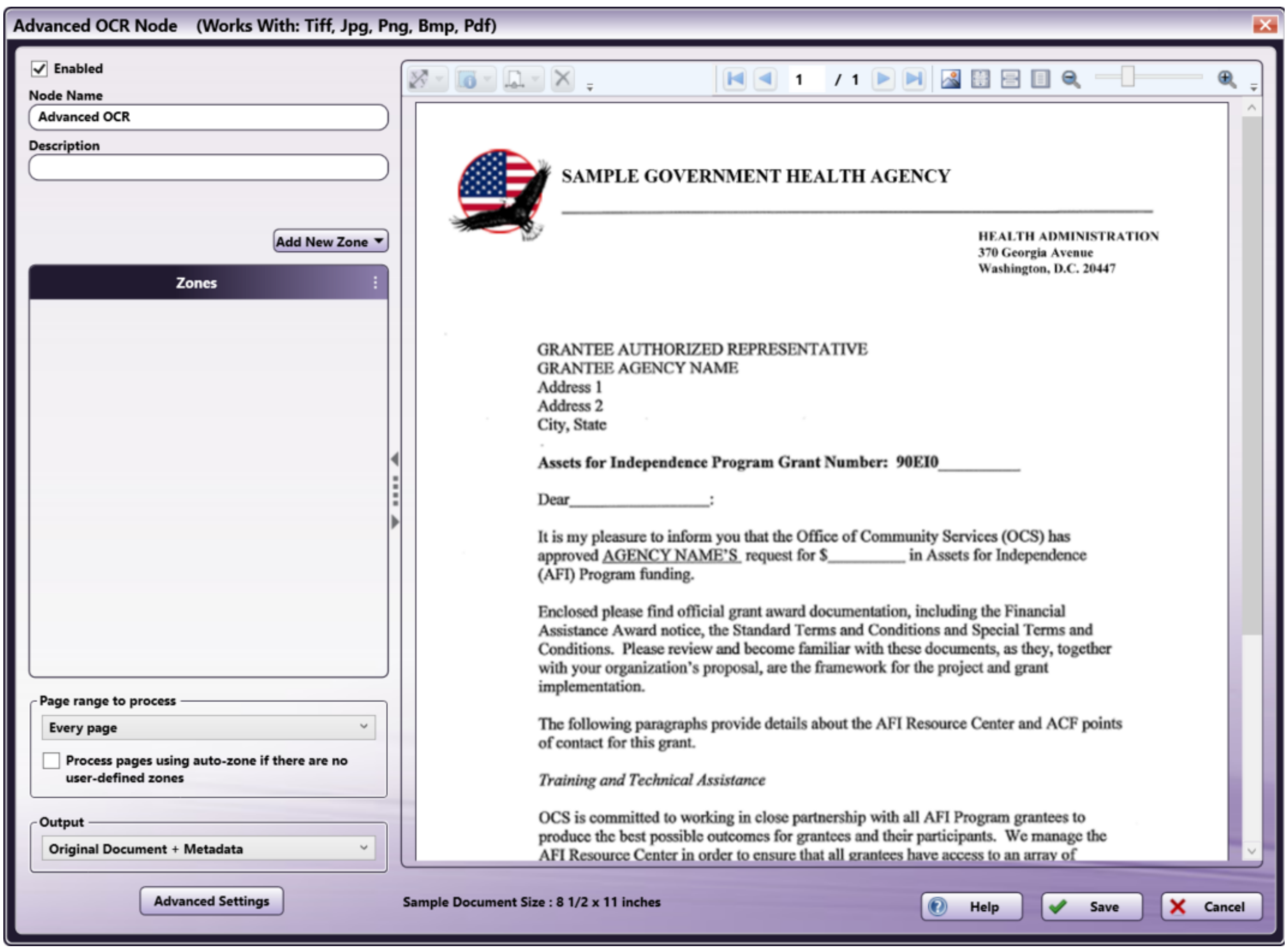
Use the Advanced OCR process node to refine optical character recognition (OCR) results and extract metadata through the use of **zones**. Through zones, you can define how you want the OCR engine to recognize various elements on the page such as text, forms, tables, graphics, etc. For example, to capture 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.

Notes:

- Dispatcher ScanTrip Cloud uses the Tesseract OCR engine.
- The recommended minimum DPI for scanned documents is 200. Better results can be expected for documents 300 DPI and above.
- The accuracy of data obtained from a document through OCR is contingent on the orientation of an incoming document matching the orientation of the OCR zones as they have been configured. It may be necessary to rotate the document at the time of scanning or with the **Advanced Settings** to ensure the orientation matches.

To open the **Advanced OCR** node's configuration window, add the node to your workflow and double-click it.

Configuring the Advanced OCR 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.
- **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

- **Advanced Settings** - To access additional settings, including image rotation and language recognition, click this button.
- **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.

Advanced OCR Node Properties

On the Advanced OCR properties window, you can fully define and customize zones for your OCR processing. The window consists of the following areas:

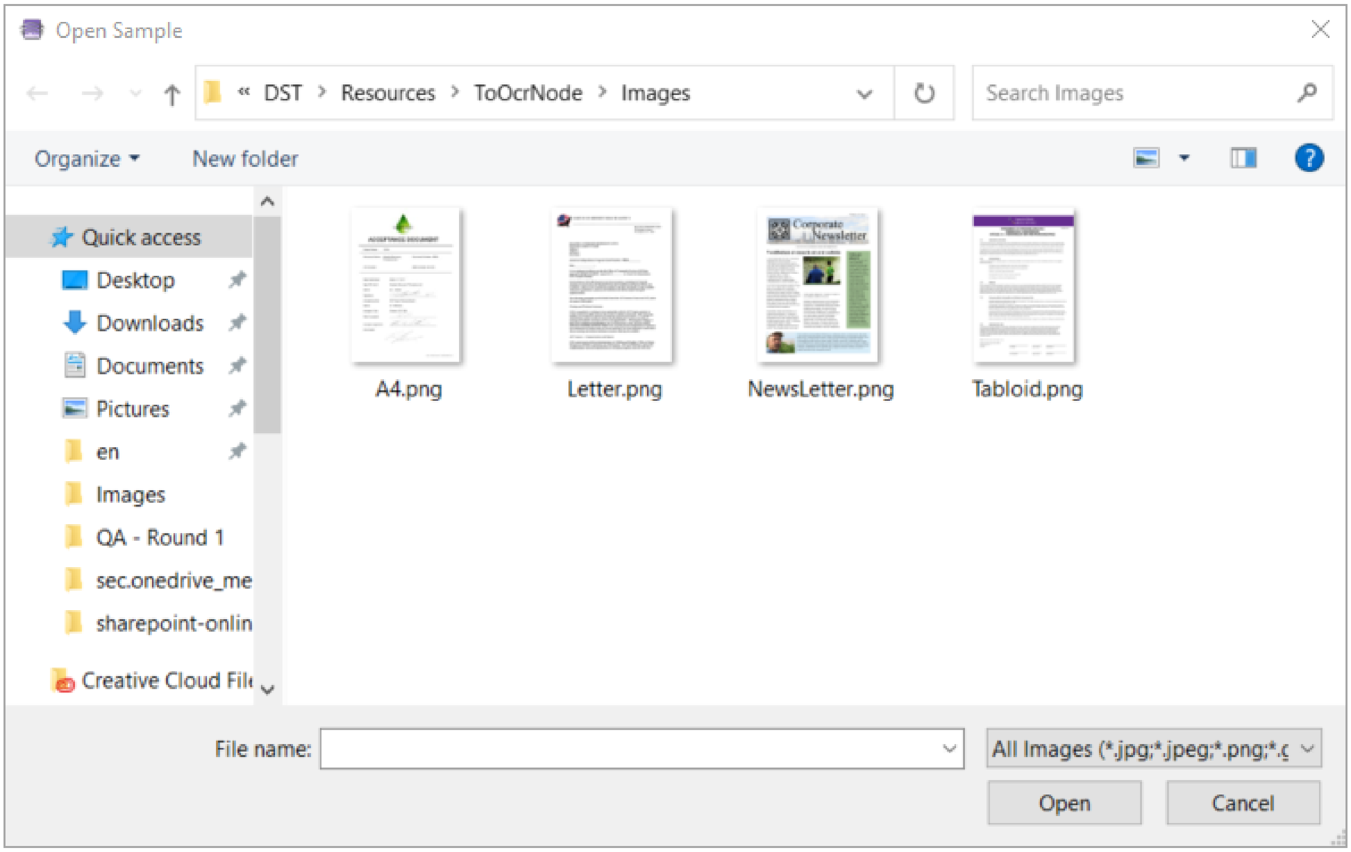
- **Preview Area**
- **Top Toolbar**
- **Zones List**
- **Additional Settings**

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:



Note: Sample documents are stored in the following directory:

```
C:\Users\Administrator\AppData\Roaming\Konica Minolta\DST\Resources\ToOcrNode\Images
```

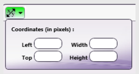
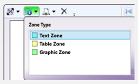
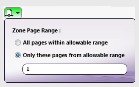
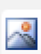
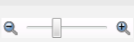
Select a document and click **Open**. The sample document appears in the Preview area.

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.

Top 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**.

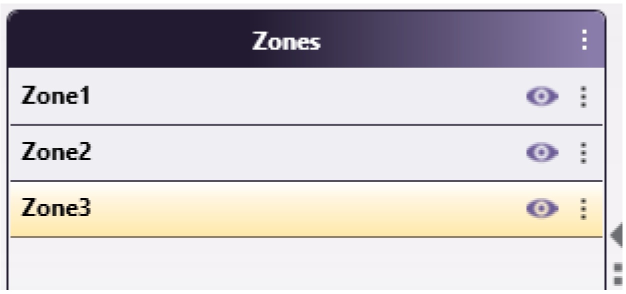
When using the drop-down palettes on the Toolbar, pressing the **Enter** key or clicking anywhere outside of the palette applies those changes to the zone.

Toolbar Icons	Description
	**Zone Coordinates** - 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 Type** - Click on this icon to define settings for a selected zone.
	**Zone Page Range** - Click to specify on which pages to apply the zone. Options include: • **All pages within allowable range** - Select this radio button to ensure that the zone applies to all pages within the range. • **Only these pages from allowable range** - Select this radio button to ensure that the zone applies only to pages within a specified range. Next, enter the page range in the empty field provided below.
	**Delete** - Click to delete a selected zone.
	Pages - Click on the arrows to navigate through multiple pages of the sample document (if necessary).
	**Upload Sample Document** - Click to find and upload another sample document to use in the Preview area.
	**Actual Size** - Click to revert the preview sample document to its original size.
	**Fit to Width** - Click to stretch the sample document to fit the width of the Preview area.
	**Whole Page** - Click to fit the sample document completely in the Preview area.
	**Zoom controls** - Use either the magnifying glass icons or the sliding bar to zoom in and out of the Preview area.

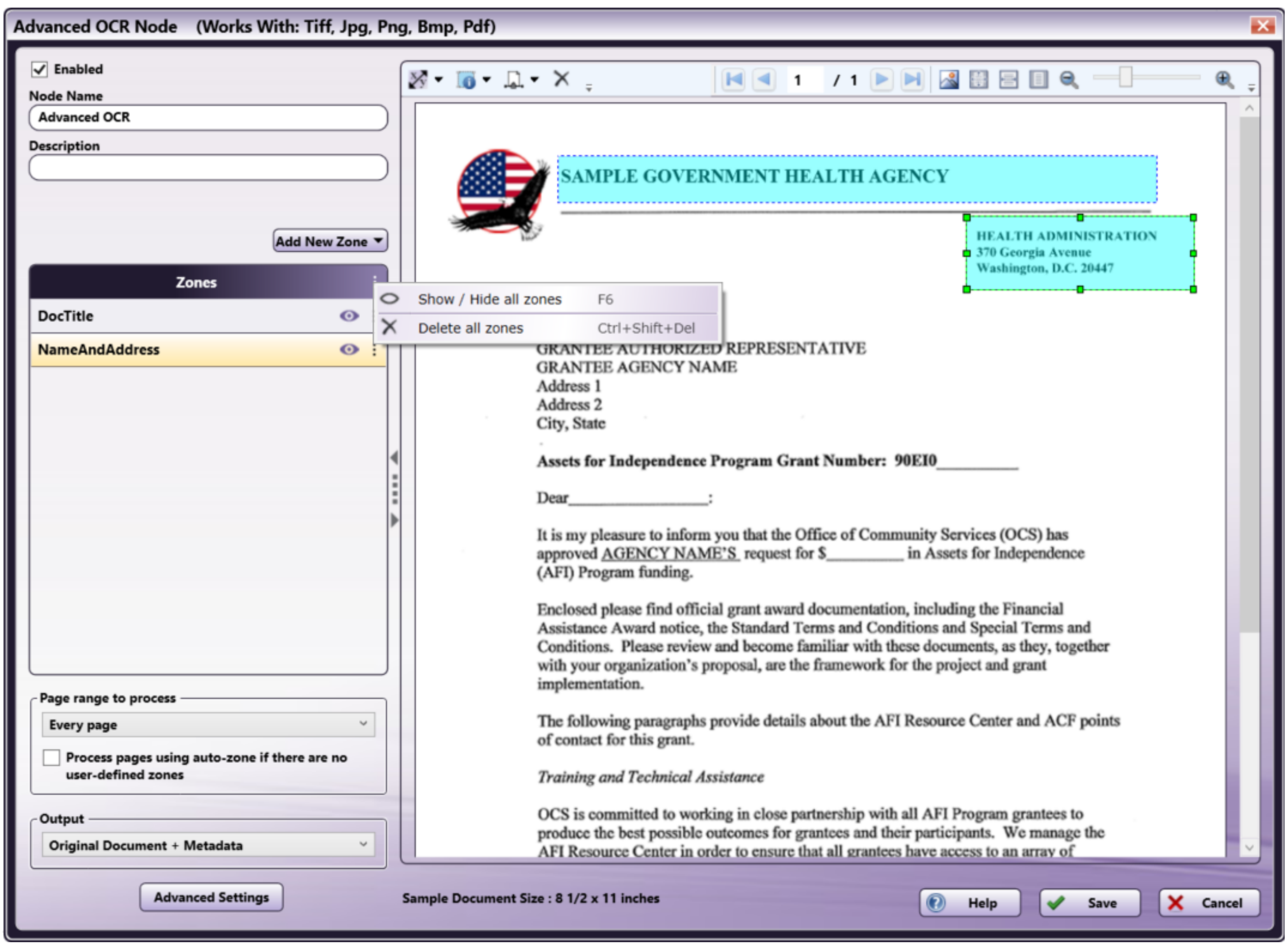
Zones List

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. 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 Zones List activates. All defined zones (if any) for the node appear in the list, as in the following illustration:



To access additional options for zones, open the **More Actions Menu** menu by clicking the ⋮ icon at the upper-right corner of the Zones List area, as shown below:

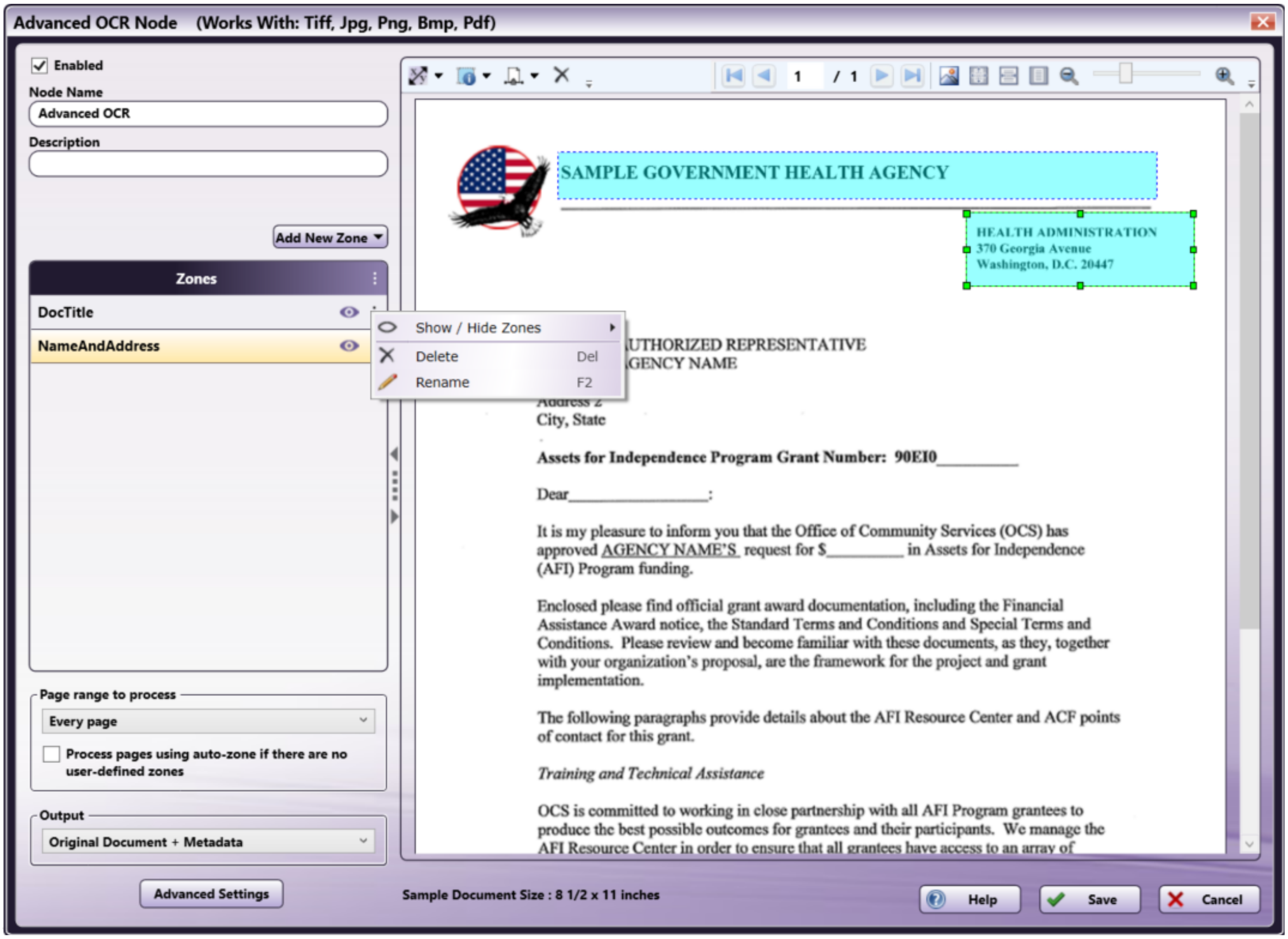


Clicking the three dots in the **Zones** area will open up the **More Actions Menu** that allows you to:

Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a “hidden” icon  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	Delete all zones from the Zone Editor / Canvas.	Ctrl+Shift+Del

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 the selected zone from the Zone Editor / Canvas.	Del
Rename	Rename the selected zone.	F2



There is a second menu for **Show / Hide Zone** with more options:

Menu Option	Menu Action	Keyboard Shortcut
Show / Hide all zones	Toggle the visibility of all zones on the Canvas and display a “hidden” icon 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
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
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:

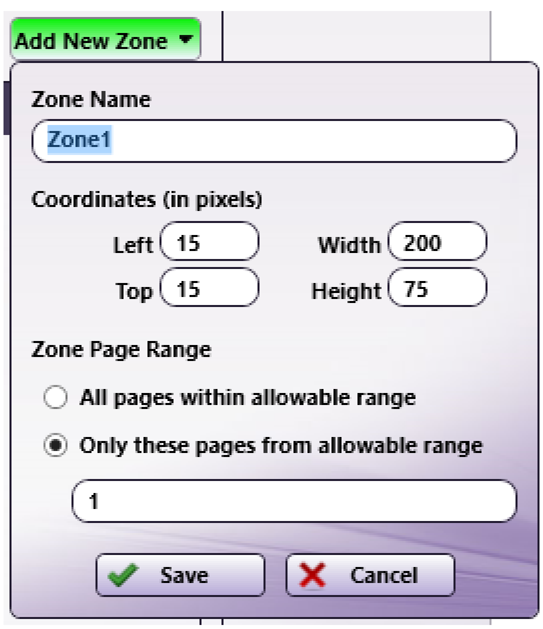
1. Click and drag the mouse in the Preview area to highlight multiple zones at once
2. Use CTRL+Click to select multiple zones. This method works in the Zones area and in the Preview area.

If you have multiple zones selected, you may select the **More Actions** menu from any of the selected zones, and the options to modify multiple zones will appear.

Creating Zones

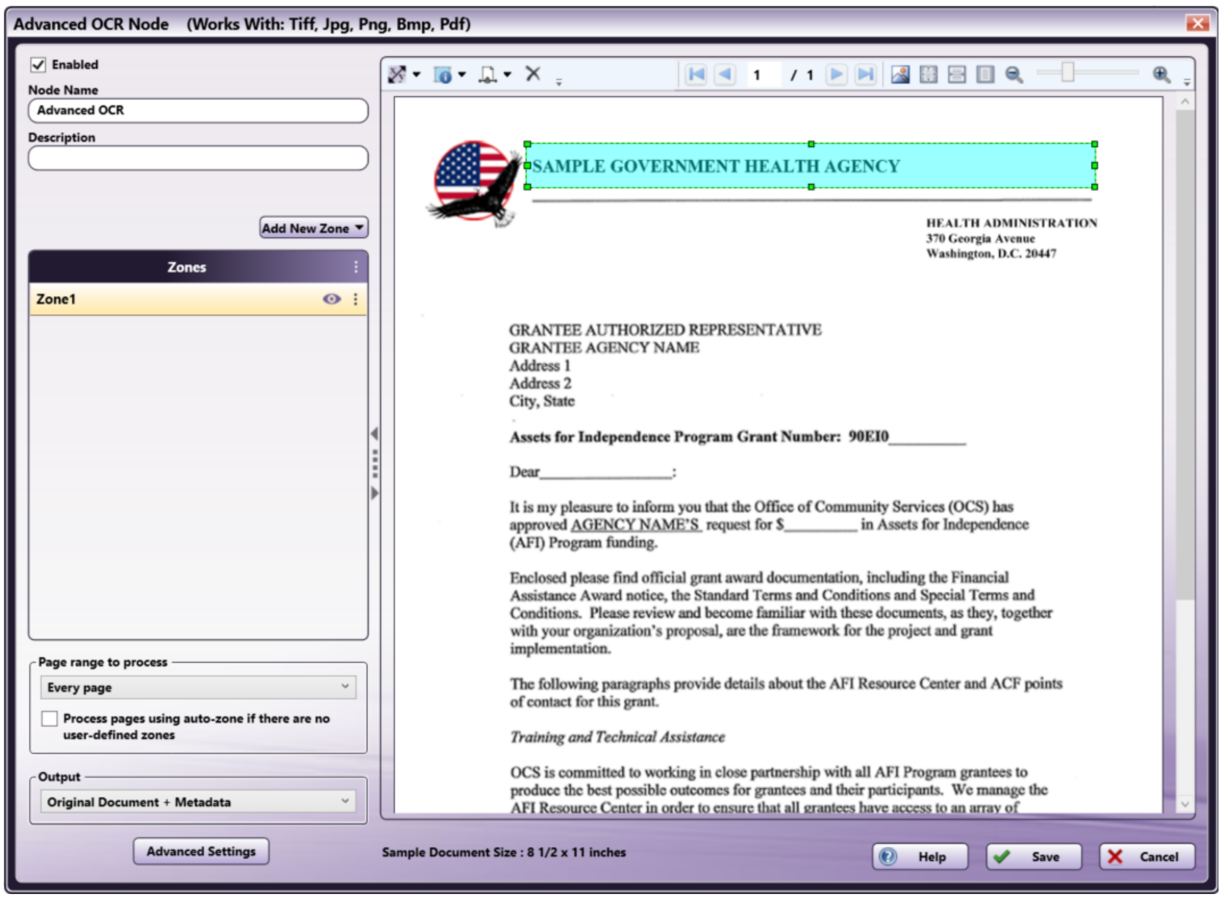
To create zones, do the following:

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.

- **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. 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.

Editing Zones

To edit a zone, click on it in the **Zones List** or the **Preview area**. You have the following options for editing a selected zone:

- **Preview area**
  - **Relocate** - Click on the zone and drag it to a new area on the Preview area.
  - **Resize** - Click on one of the handles on the zone border and drag the edge to a new location on the Preview area. Note that the handles may not be available if you drastically change the size of the sample document. In such cases, click on the  icon on the Toolbar to use the Zone Coordinates option to resize 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:

- **Text Zone** - Zone contents will be treated as flowing text.
- **Table Zone** - Zone contents will be treated as a table.
- **Graphic Zone** - Zone contents will be treated as an embedded image, and not as recognized text (e.g., photos, logos, and drawings).

OCR Metadata

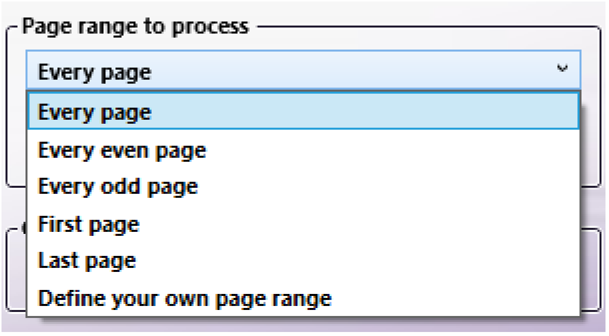
Once you define an OCR zone, other nodes in the workflow can reference it. For more information about OCR Metadata and Metadata syntax, see the **Metadata Browsing** page.

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. The **Page range to process** area appears at the left of the node properties window, below the Zone List. If you 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.

  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.

Choosing an Output Format

Use the Output field to specify the format of the output file. This area appears at the left of the node properties window, below the Zone List.

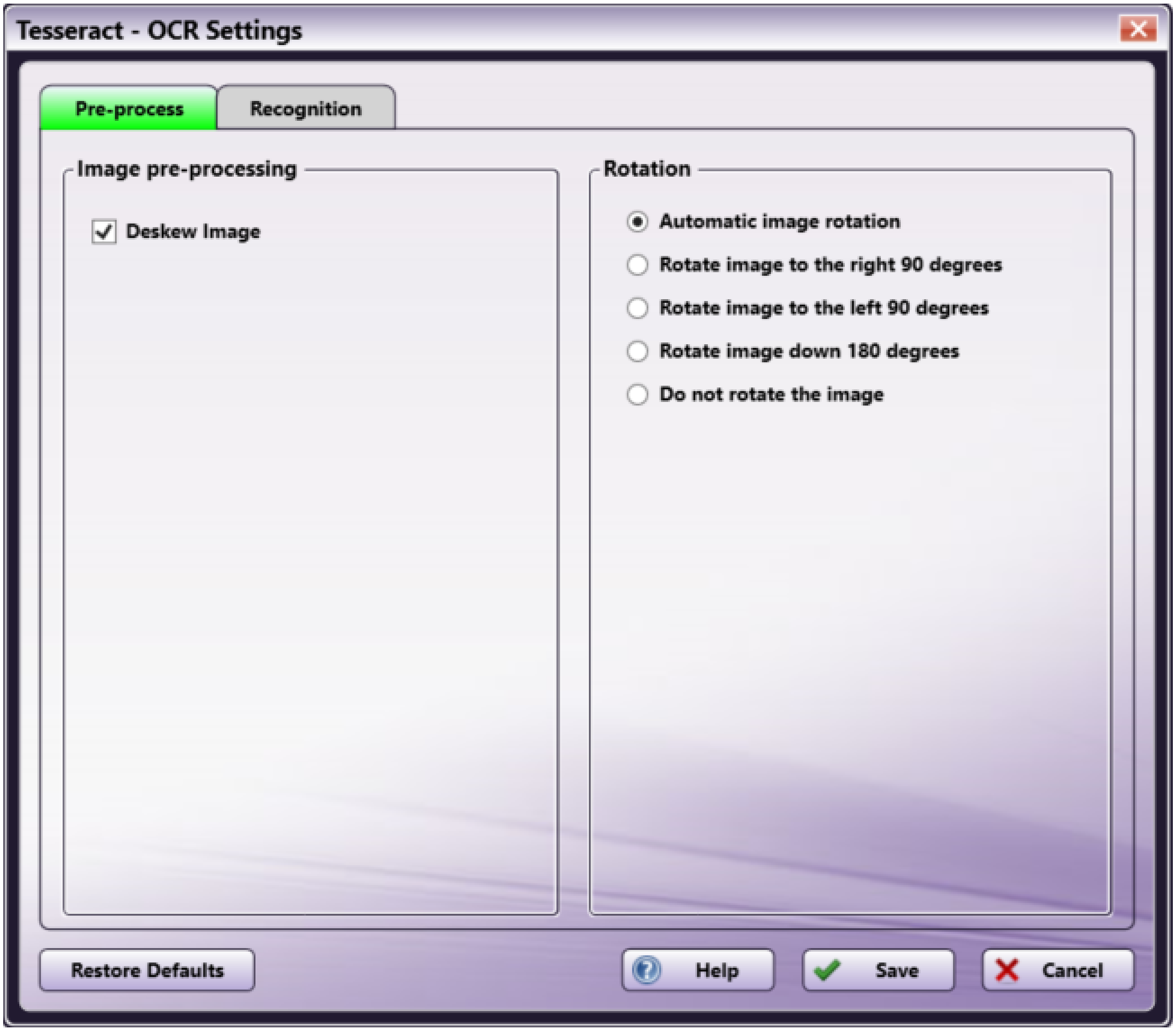
At the Output field, if you click on the drop-down, a list of output options appears:

- **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.
- **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.
- **Text** - Outputs the document to plain text (*.TXT) that can be read by most text editors and word processors.
- **Comma Separated Text -** Outputs the document into a tabled text file that can be read by Excel (*.CSV).
- **Text with line breaks** - Outputs the document to text with a line break after each line.
- **Unicode Text** - Outputs the document to plain text, using two-byte Unicode characters.
- **Unicode Comma Separated Text** - Outputs the document into a tabled text file using two-byte Unicode characters. The resulting file can be read by Excel.
- **Unicode Text with line breaks** - Outputs the document to text with a line break after each line and uses two-byte Unicode characters.

Note: All processed output files include only the content captured in the user-defined zones, except for **Original Document + Metadata** and **PDF Searchable**. These output formats include the original file along with the content captured in the zones.

OCR Advanced Settings

This topic describes the Advanced Settings window for nodes that use optical character recognition (OCR). These nodes contain the **Advanced Settings** button, which accesses the OCR Settings window. See the illustration below:



Note: Dispatcher ScanTrip Cloud supports the Tesseract OCR engine.

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-process**
- **Recognition**
- **Output** (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.
- **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.

Pre-process

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.

- **Deskew Image** - When this setting is enabled, images that have been scanned crookedly are automatically straightened during the preparation process. The default value is 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.

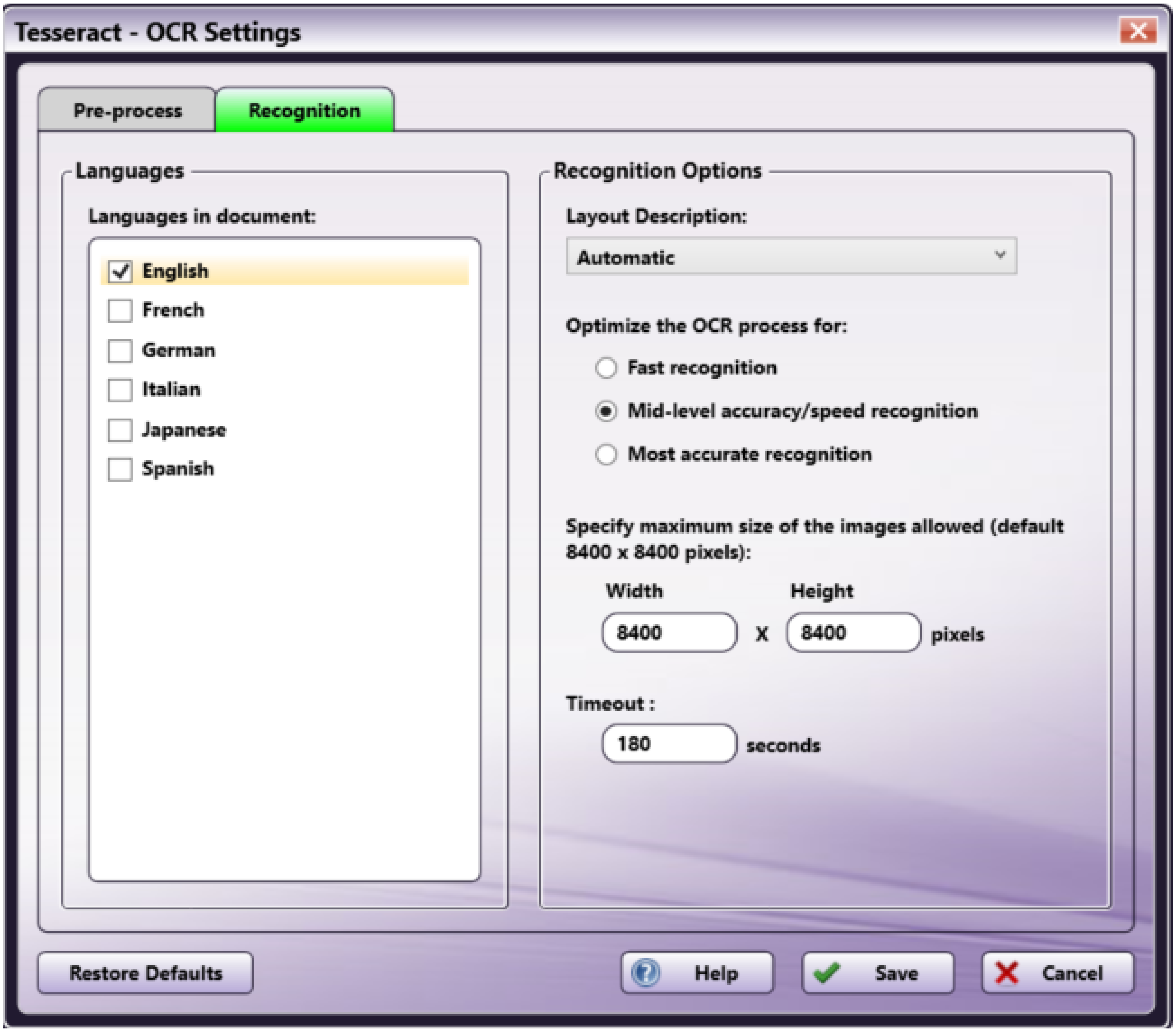
- **Automatic image rotation** - When this setting is enabled, the orientation of incoming images is detected and improperly oriented page images are automatically rotated (by 90, 180, or 270 degrees) before OCR takes place. This enabled option is the default value for rotation and mirroring.
- **Rotate image to the right 90 degrees** - When this setting is enabled, improperly oriented page images are rotated by 90 degrees, clockwise.

  Important! Dispatcher ScanTrip Cloud does not auto-rotate documents that are scanned in a short-edge direction (typically top-first). This can cause OCR zones to not line up properly with the intended text. To realign OCR zones with the intended text, select the **Rotate image to the right 90 degrees** option.
- **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 illustration below shows the options available. All options, including the available languages for each OCR engine, are described in sections below the illustration.



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.

Language Options

Dispatcher ScanTrip Cloud supports the following languages:

- English
- French
- German
- Italian
- Japanese
- Spanish

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.

Description

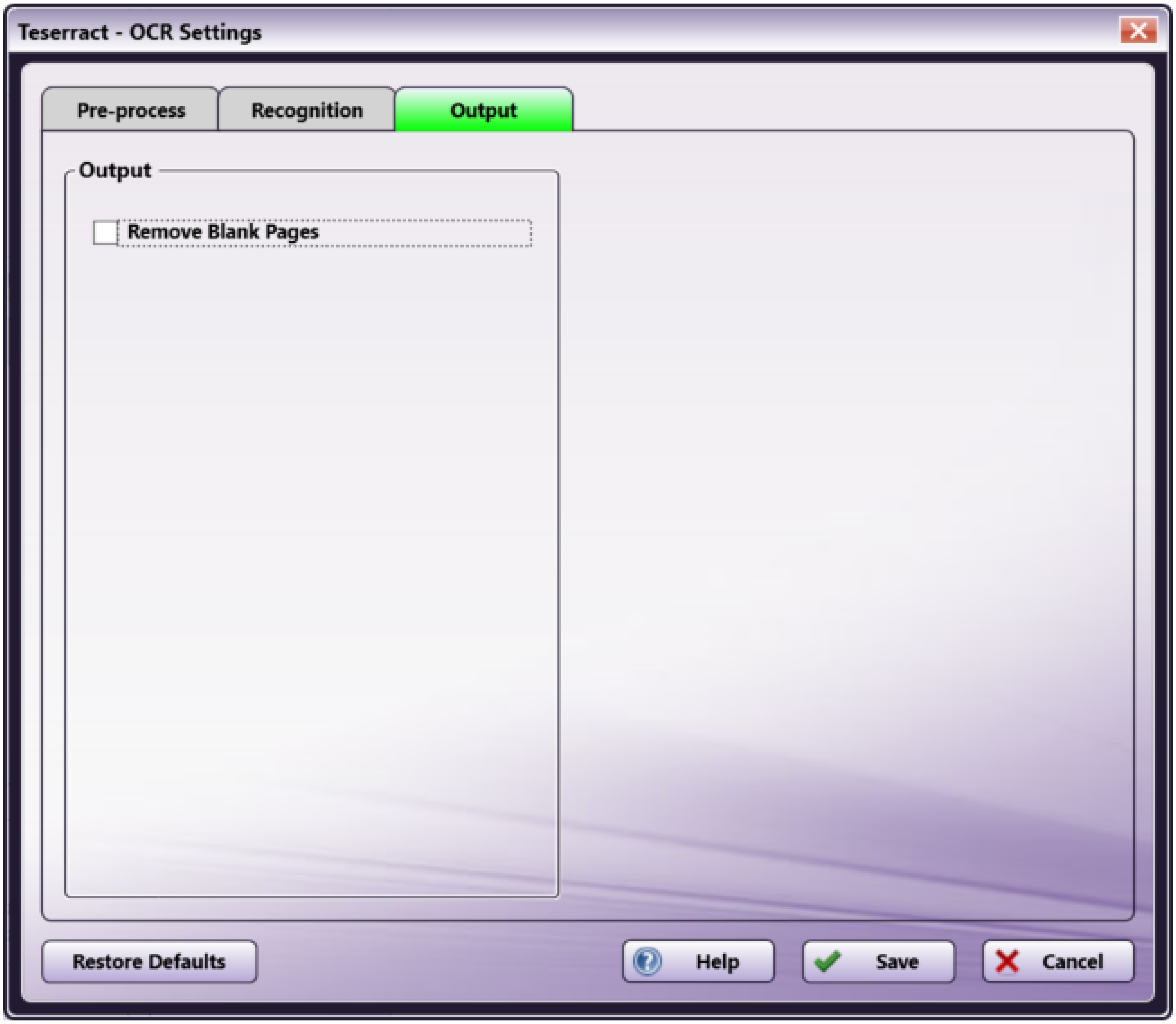
- **Automatic** - To auto-detect the layout (e.g., whether the text is in columns, etc.), select this option. This option allows for the speediest processing time. This option is useful if:
  - You want to process your documents quickly.
  - Your documents contain pages with different/unknown layouts.
  - Your documents have pages with multiple columns and a table.
  - Your documents have pages containing more than one table.
- **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.
- **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.
- **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.

  Note: If the OCR engine is processing a document when the Timeout reaches the specified amount of time, the process will stop and generate the document based on the processed document. For example, if the OCR engine is on page 27 of a 30-page document when it reaches the Timeout limit, it will generate a 27-page document, and the remaining pages will be lost. You can increase the Timeout limit to allow the OCR engine sufficient time to process particularly large documents.

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.



Output

- **Remove Blank Pages** - When this setting is enabled, blank pages will not be included in the output file. This box is unchecked by default.

Distribution Nodes

Connectors

Third-Party Connectors

Connector nodes connect Dispatcher ScanTrip Cloud to a third-party document storage application. These connector nodes require an account with the third-party application to properly distribute files. Connectors include:

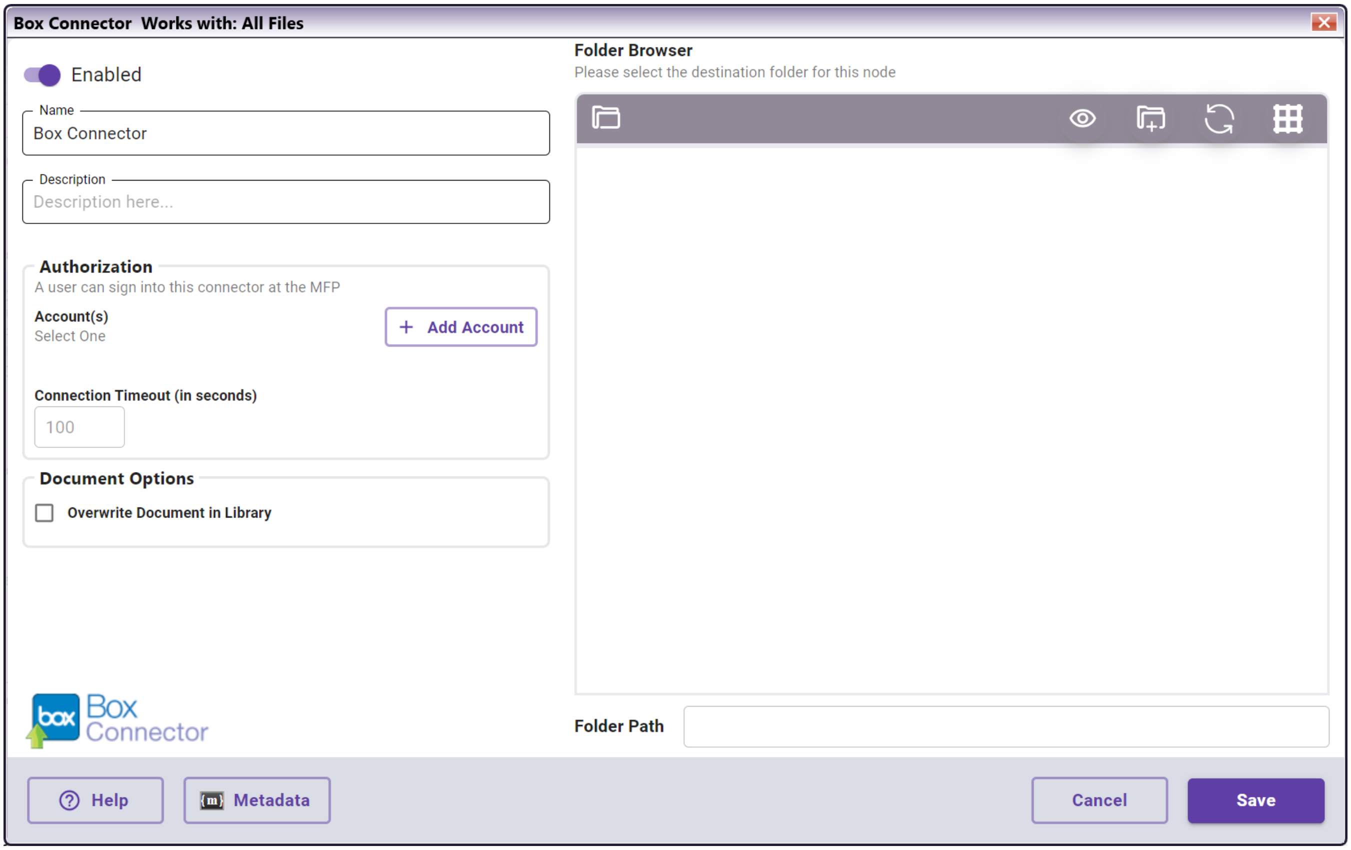
- **Box**
- **Paragon Cloud Fax**
- **Dropbox**
- **Google Drive**
- **OneDrive**
- **OneDrive for Business**
- **SharePoint Online**
- **WebDAV**

Important! 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.

Box Connector

Use the Box Connector node to distribute documents to Box, an online file sharing and cloud content management service. You can send documents to Box via an automated workflow, or you can access Box directly at the MFP panel.

Note: To use the Box Connector node, you must have a Box account.



Configuring the Box Connector

To open the node's configuration window (shown above), add a Box Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.

- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

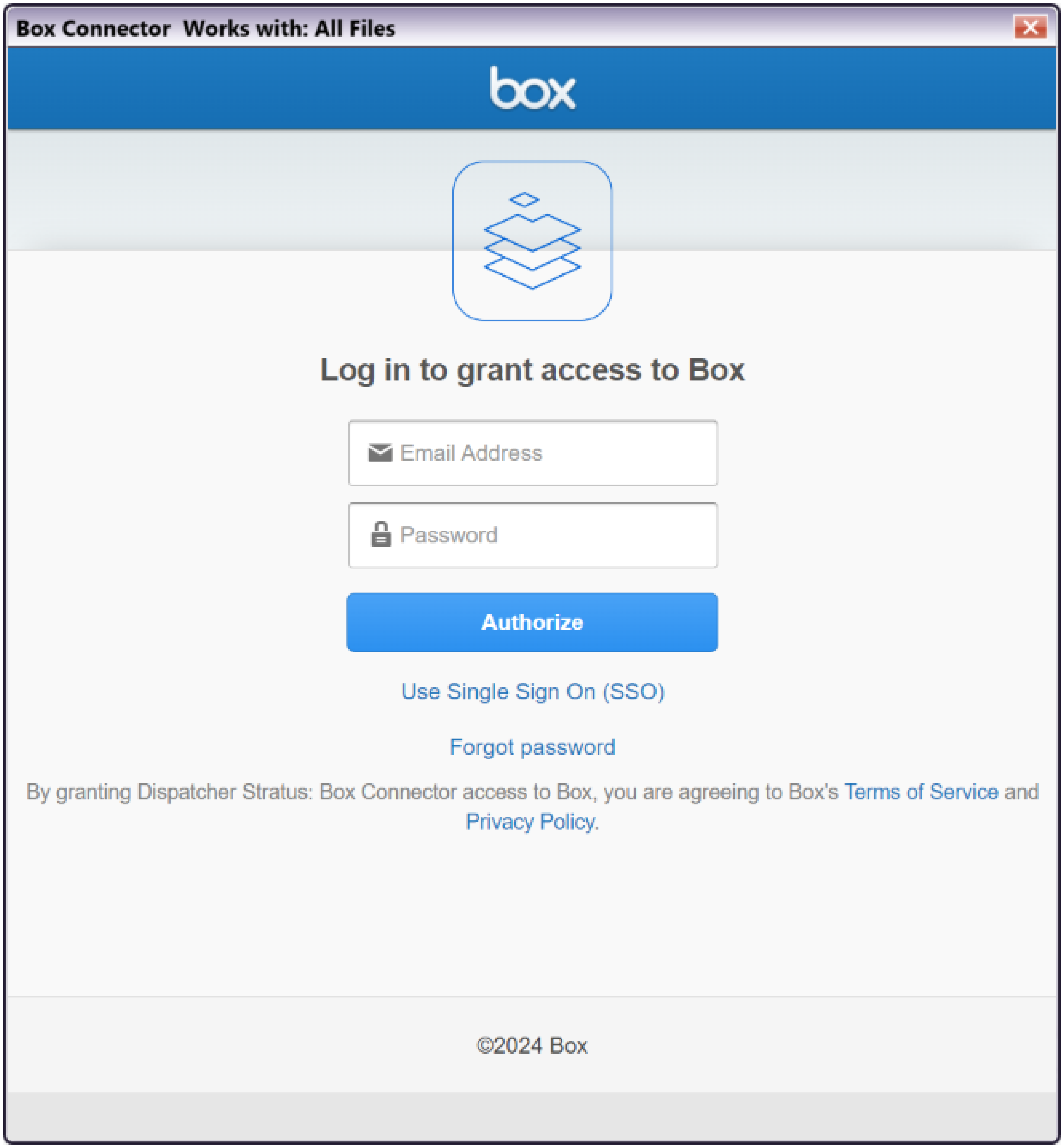
Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

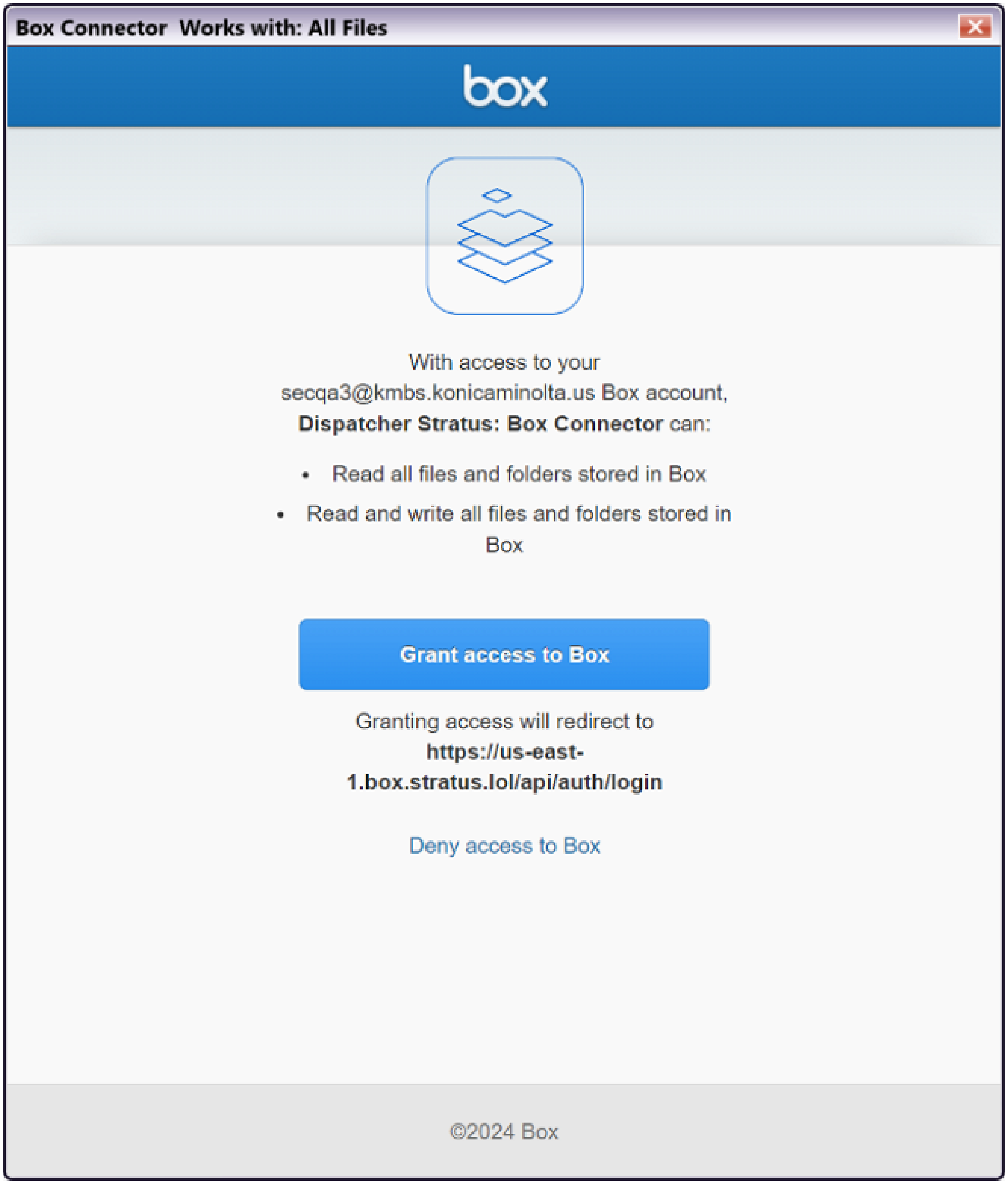
Authorization

To use this node in a workflow, you must connect it to a Box account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a Box account, do the following:

1. Select **Add Account**. The Box login window appears:



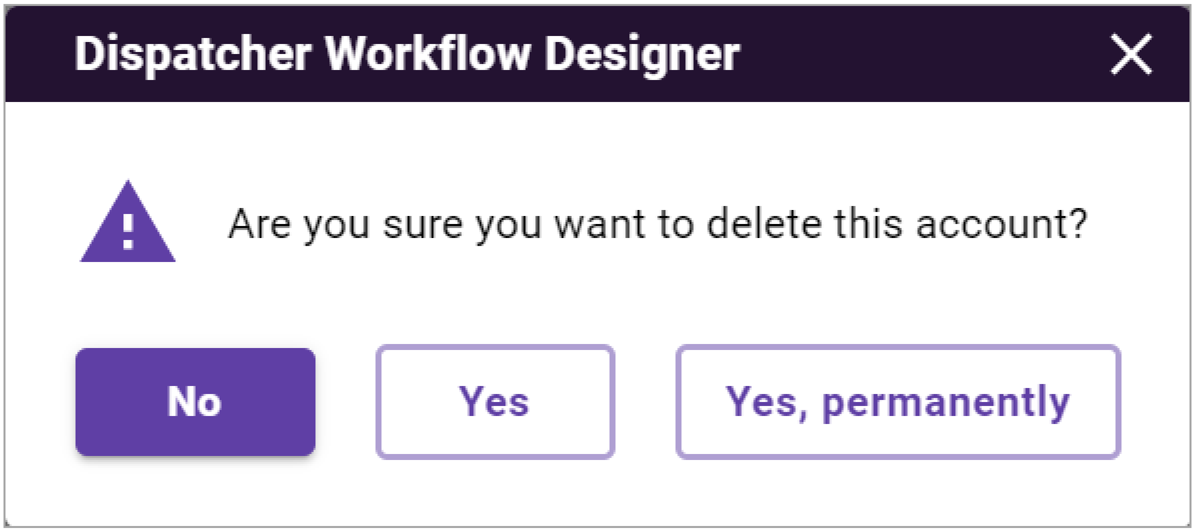
2. Enter the login information for the Box account, then select **Authorize**. The Confirmation window appears:



3. Either confirm you want to give Dispatcher ScanTrip Cloud access to your Box account, or select **Deny access to Box** to exit the window. You return to the Box Connector.
4. If multiple accounts are available, select the radio button next to the desired account.
5. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:



- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

Document Options

In the Document Options area, you can update certain aspects of documents that pass through the node.

- **Overwrite Document in Library** - By checking this box, a document that is uploaded to Box with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will be appended with a unique number added so as to save both versions.

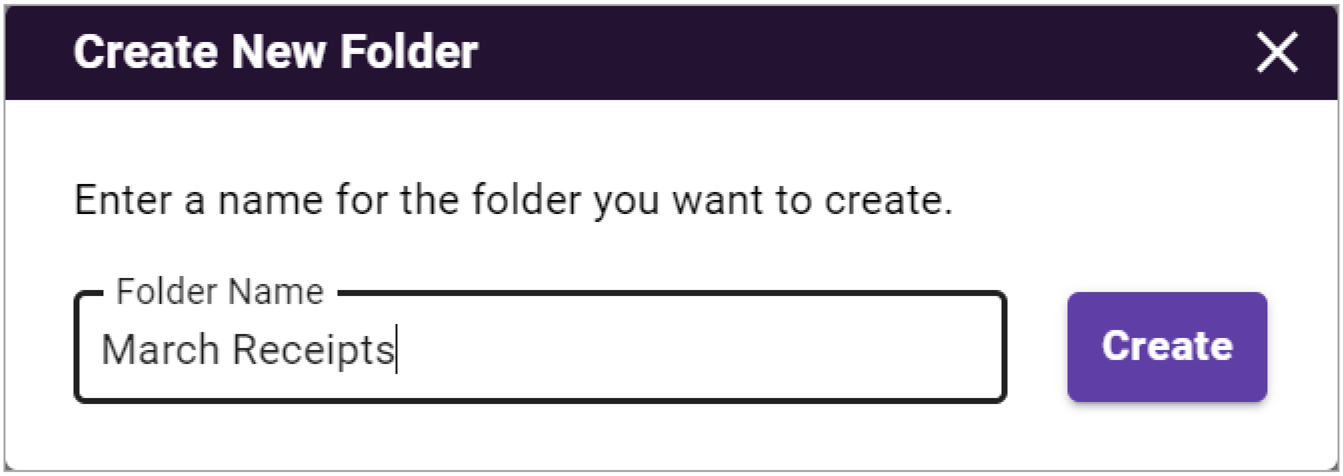
Note: The file will have an icon next to the file name with a number representing the number of times that file has been uploaded. Selecting that icon will show the other versions of that file. This functionality is only available from Box with an account level of “Pro” and higher. Standard Box account users will not be able to view file versions.

Customizing the Box Connector Node

Once connected to a Box account, the Folder Browser area populates with a tree-view of your Box folders, sub-folders, and files. Browse through your Box folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

Sending Documents to a New Folder

To create a new folder in Box, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the Box account. The Box Connector will automatically create any new folders and then upload the document(s) to that location.

File and Folder Name Restrictions

The following restrictions apply to file and/or folder 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 / or \

View Options

The toolbar in the Folder Browser area provides the following view options for your Box folders:

Icon	Name	Description
	Show/Hide Files	Click this button to show or hide files stored in Box folders. When you have selected to **Hide Files**, you will only see folders.
	Refresh	Click this button to refresh the current view with the most up-to-date folders/files.
	Change View	Click this button to change from list view to grid view and back.

Accessing Box at the MFP

At the MFP, do the following:

1. **Select your workflow** - If only one workflow is currently running, that workflow appears. If multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Available options are determined by your selections in the **MFP Capture** node.

   If you configured a **Form Selector** node, continue to step 3. Otherwise, skip to step 5.
3. **Enter your login credentials** - If a Box account has not already been selected during node setup, you will need to add your Box account before entering your login credentials. Select **Add Account** to choose an account.
4. **Select your file destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.
5. **Select the “Scan” button** - This sends the scanned document to the selected Box account and folder.

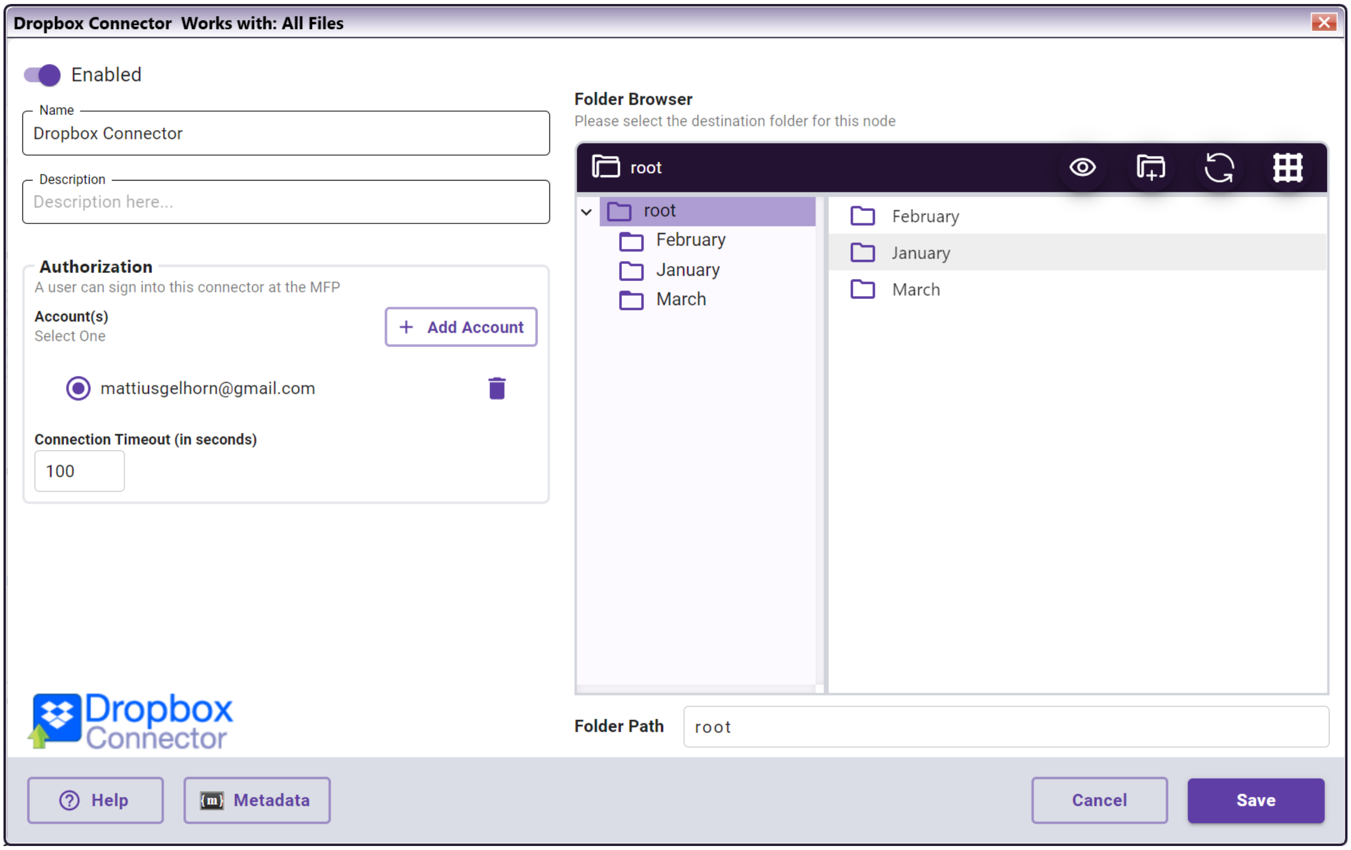
Dropbox Connector

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.
- Share Dropbox files directly from the MFP control panel via email.
- Control editing access to the scanned document via email addresses.
- More.

Notes:

- To use the Dropbox Connector, you must have a Dropbox account.
- The maximum file size for uploading documents to Dropbox is 20 GB.



Configuring the Dropbox Connector

To open the node's configuration window (shown above), add a Dropbox Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
    - The workflow will ignore the node.
    - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.

- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

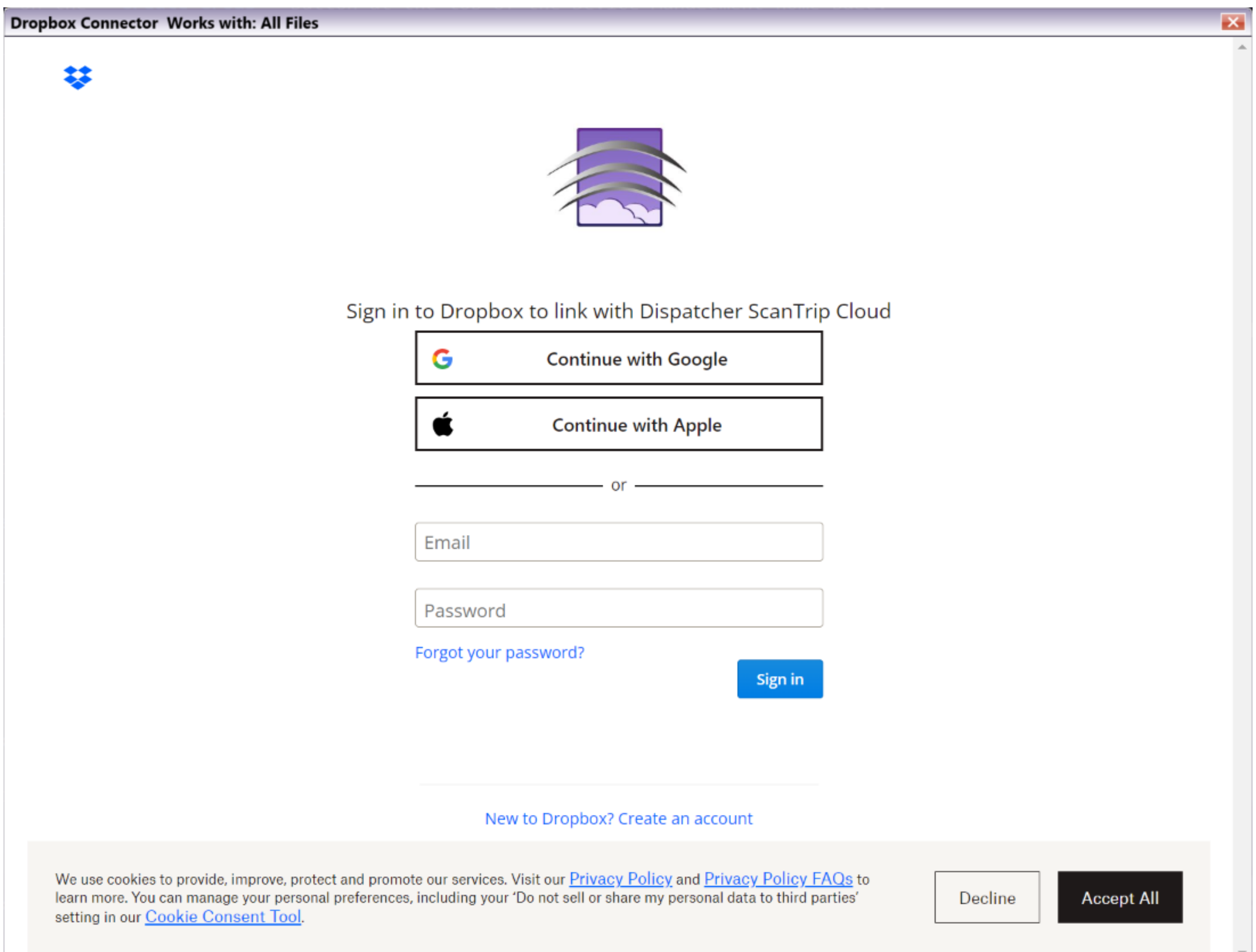
Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Authorization

To use this node in a workflow, you must connect it to a Dropbox account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a Dropbox account, do the following:

1. Select **Add Account**. The Dropbox login window appears:



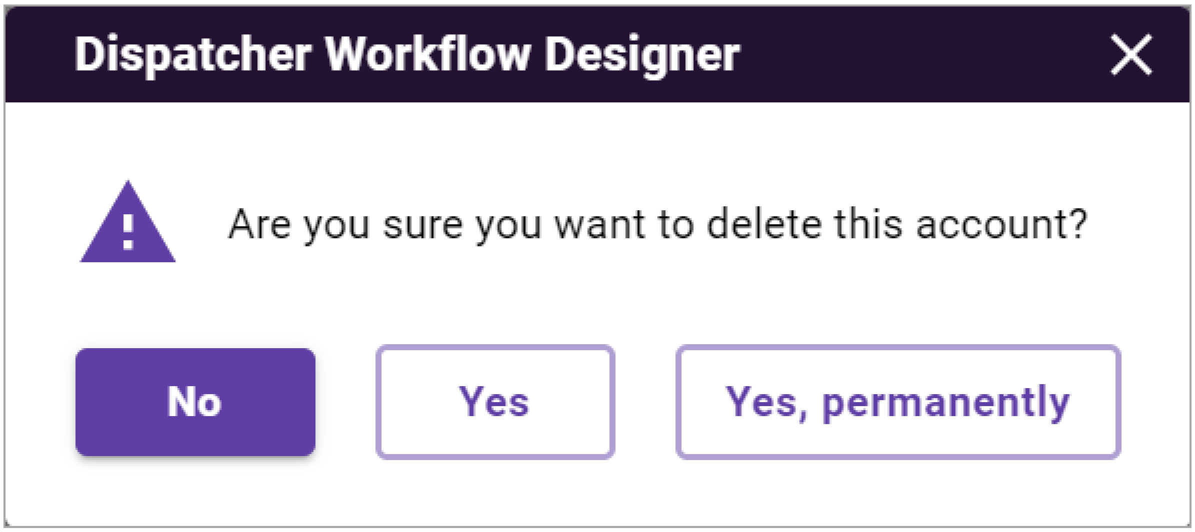
2. Enter the login information for the Dropbox account. Note that the Dropbox Connector also supports Google and Apple logins. Then, select **Sign In**. You return to the Dropbox Connector.

If multiple accounts are available, select the radio button next to the desired account.

3. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:



- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

Customizing the Dropbox Connector Node

Once connected to a Dropbox account, the Folder Browser area populates with a tree-view of your Dropbox folders, sub-folders, and files. Browse through your Dropbox folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

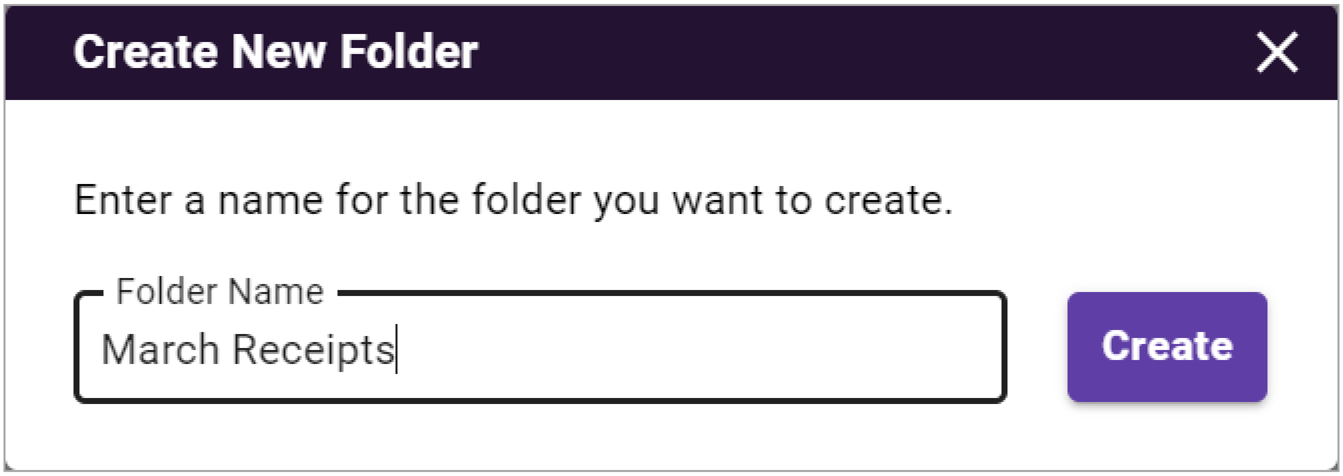
The following folder types may appear in the Dropbox Explorer area, depending on your Dropbox version:

- Dropbox Personal folder
- Dropbox Team folder
- Dropbox Team Member folder

- Dropbox Shared folder

Sending Documents to a New Folder

To create a new folder in Dropbox, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the Dropbox account. The Dropbox Connector will automatically create any new folders and then upload the document(s) to that location.

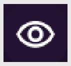
File Name Restrictions

The following restrictions apply to file names:

- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- The following characters cannot be used: `/ \`

View Options

The toolbar in the Folder Browser area provides the following view options for your Dropbox folders:

Icon	Name	Description
	**Show/Hide Files**	Click this button to show or hide files stored in Dropbox folders. When you have selected to **Hide Files**, you will only see folders.
	**Refresh**	Click this button to refresh the current view with the most up-to-date folders/files.
	**Change View**	Click this button to change from list view to grid view and back.

Accessing Dropbox at the MFP

At the MFP, take the following steps:

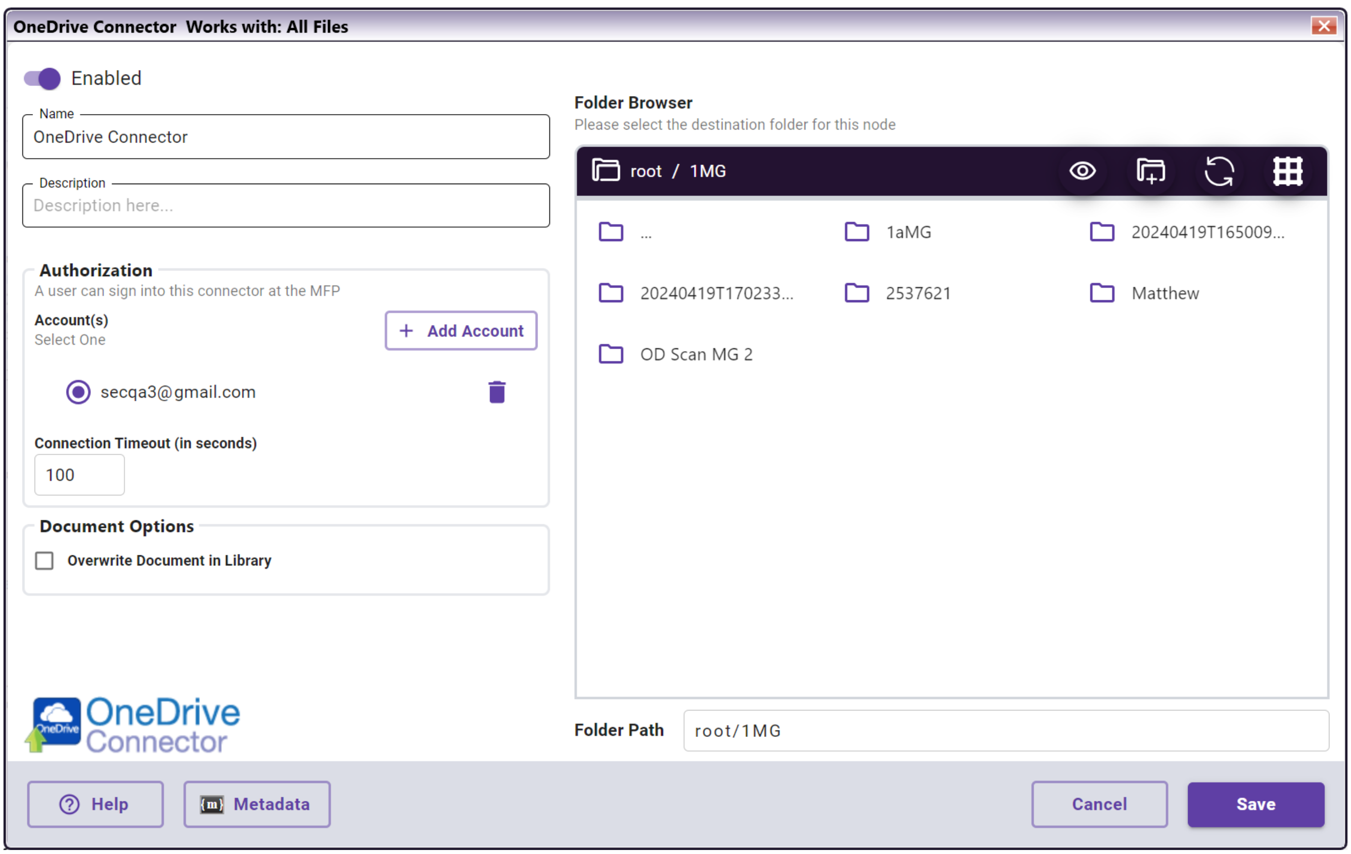
1. **Select your workflow** - If only one Dispatcher ScanTrip Cloud workflow is currently running, that workflow appears. If multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Available options are determined by your selections in the **MFP Capture** node.

   If you configured a **Form Selector** node, continue to step 3. Otherwise, skip to step 5.
3. **Enter your login credentials** - If a Dropbox account has not already been selected during node setup, you will need to tap the **Add Account** button to add your Dropbox account before entering your login credentials.
4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.
5. **Select the “Scan” button** - This sends the scanned document to the selected Dropbox account and folder.

OneDrive Connector

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.

Note: To use the OneDrive Connector node, you must have a OneDrive account.



Configuring the OneDrive Connector Node

To open the node's configuration window (shown above), add a OneDrive Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
    - The workflow will ignore the node.
    - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.

- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

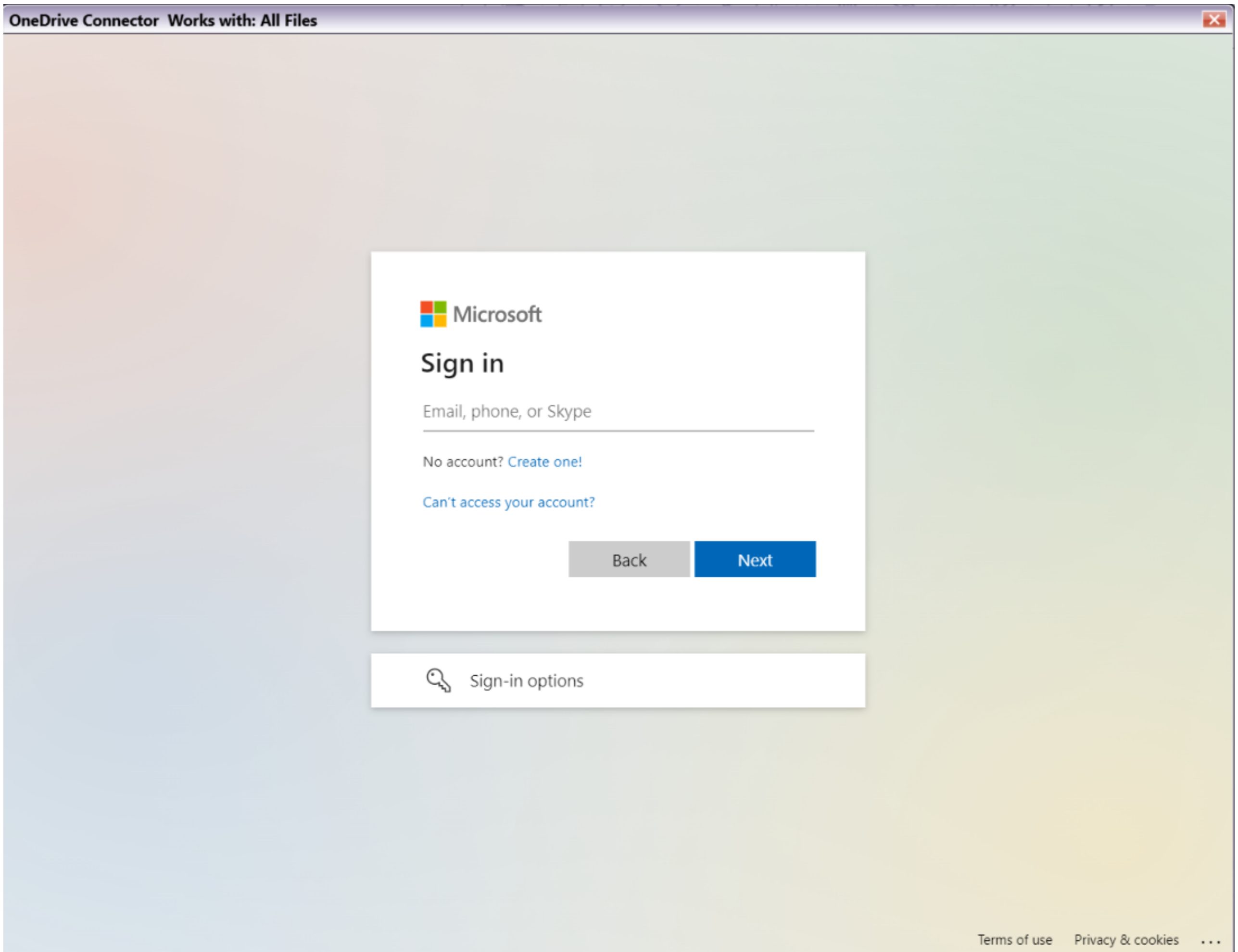
Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

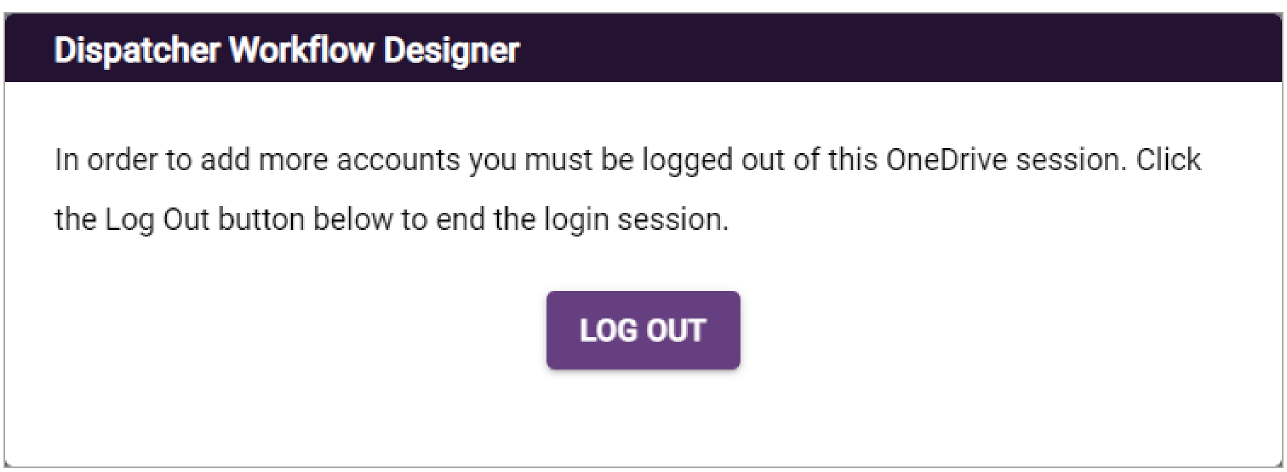
Authorization

To use this node in a workflow, you must connect it to a OneDrive account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a OneDrive account, do the following:

1. Select **Add Account**. The OneDrive login window appears:



2. Enter the login information for the OneDrive account. Then, select **Sign in**. You return to the OneDrive Connector node.

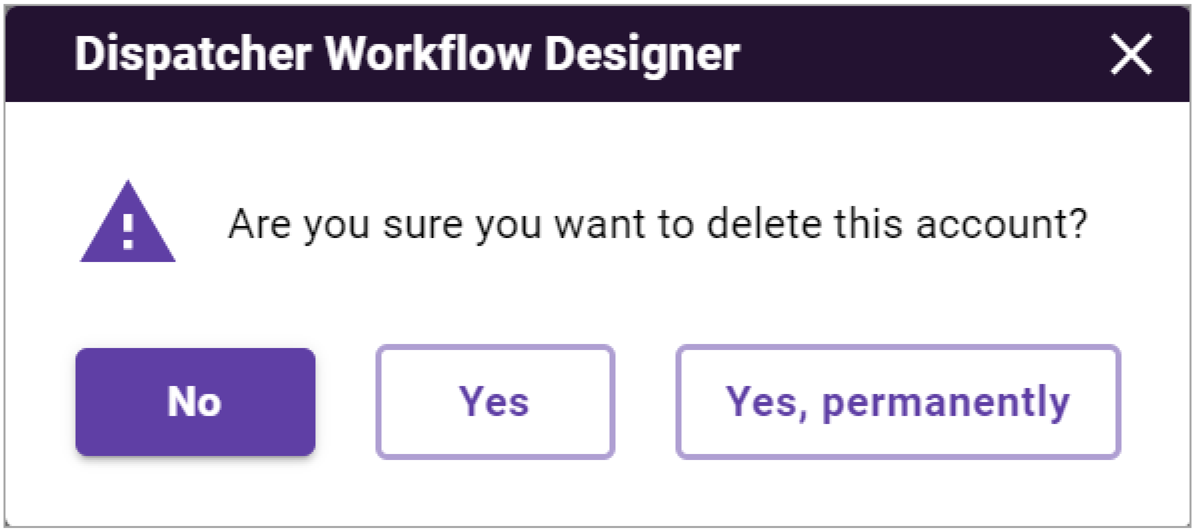


Note: You can add only one OneDrive account per session. To add another OneDrive account, you must save the node and reopen it.

4. If multiple accounts are available, select the radio button next to the desired account.
5. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:



- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

Document Options

In the Document Options area, you can update certain aspects of documents that pass through the node.

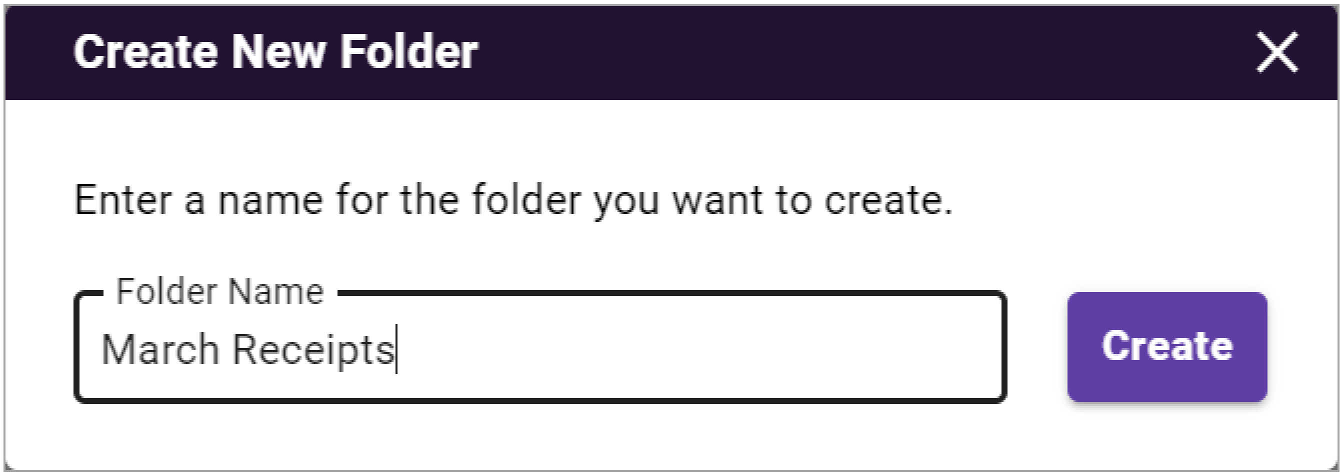
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to OneDrive with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both versions.

Customizing the OneDrive Connector Node

Once connected to a OneDrive account, the Folder Browser area populates with a tree-view of your OneDrive folders, sub-folders, and files. Browse through your OneDrive folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

Sending Documents to a New Folder

To create a new folder in OneDrive, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the OneDrive account. The OneDrive Connector node will automatically create any new folders and then upload the document(s) to that location.

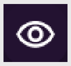
File and Folder Name Restrictions

The following restrictions apply to file and/or folder 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 `< > : " / \ | ? *`
- File names cannot only be a tilde (~). However, a tilde can be used in a file name along with other characters, including a file extension.
- The metadata key `{workflow:modified}` cannot be used in the folder path, because the resolved value contains a colon (:).

View Options

The toolbar in the Folder Browser area provides the following view options for your OneDrive folders:

Icon	Name	Description
	**Show/Hide Files**	Click this button to show or hide files stored in OneDrive folders. When you have selected to **Hide Files**, you will only see folders.
	**Refresh**	Click this button to refresh the current view with the most up-to-date folders/files.
	**Change View**	Click this button to change from list view to grid view and back.

Accessing OneDrive at the MFP

At the MFP, take the following steps:

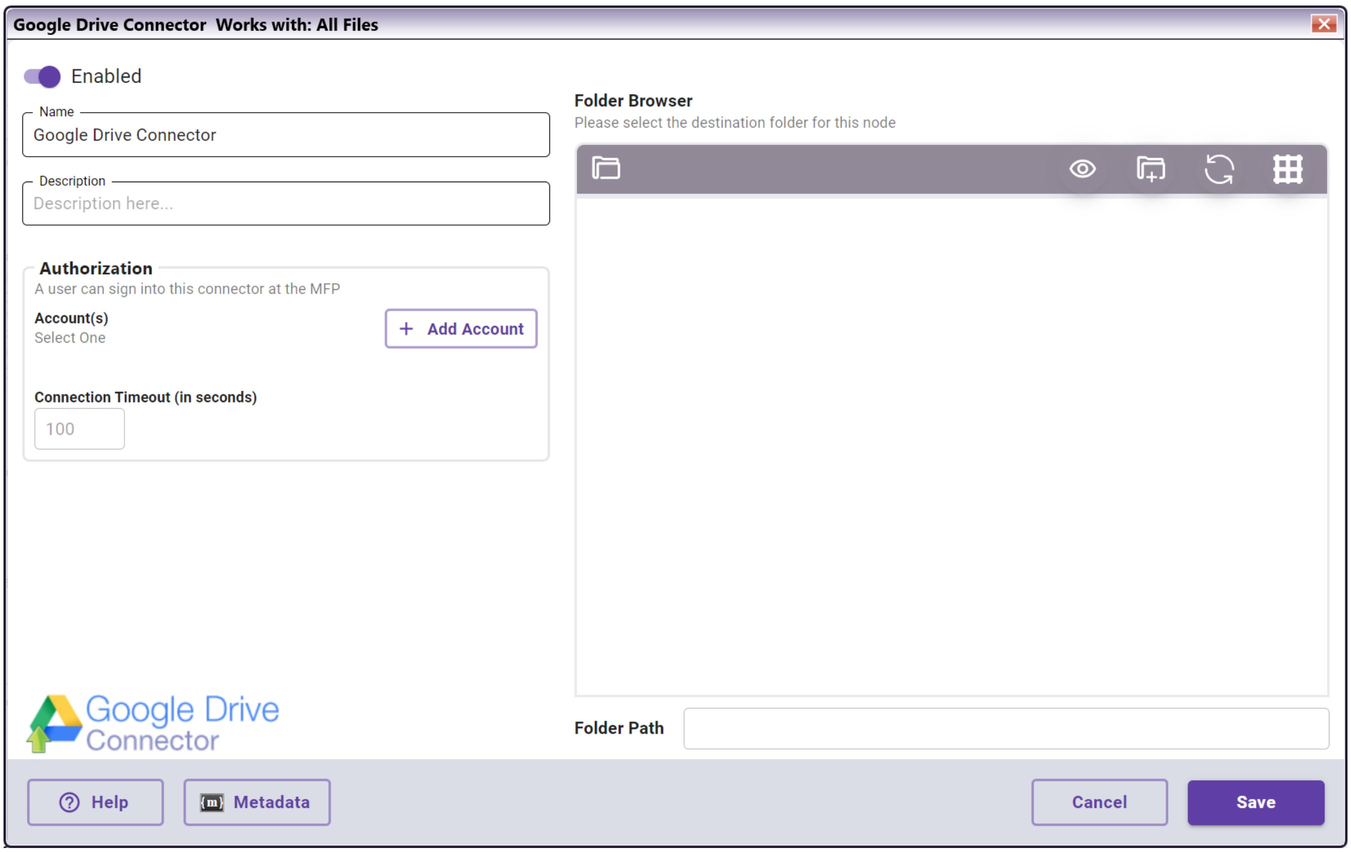
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. If multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Available options are determined by your selections in the **MFP Capture** node.

   If you configured a **Form Selector** node, continue to step 3. Otherwise, skip to step 5.
3. **Enter your login credentials** - If a OneDrive account has not already been selected during node setup, you will need to add your OneDrive account before entering your login credentials. Select **Add Account** to choose an account.
4. **Select your file destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.
5. **Select the “Scan” button** - This will send the scanned document to the selected OneDrive account and folder.

Google Drive Connector

Use the Google Drive Connector node to distribute documents to Google Drive, a file storage and synchronization service created by Google. You can send documents 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.



Configuring the Google Drive Connector

To open the node’s configuration window (shown above), add a Google Drive Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until “Enabled” displays. The default setting is “Enabled”. If you disable the node:
    - The workflow will ignore the node.
    - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.
- **Name** - The name in this field appears below the node’s icon in the workflow. The node’s name defaults, but you can edit it. For example, you can specify a name that indicates the node’s function in the workflow.
- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

Buttons

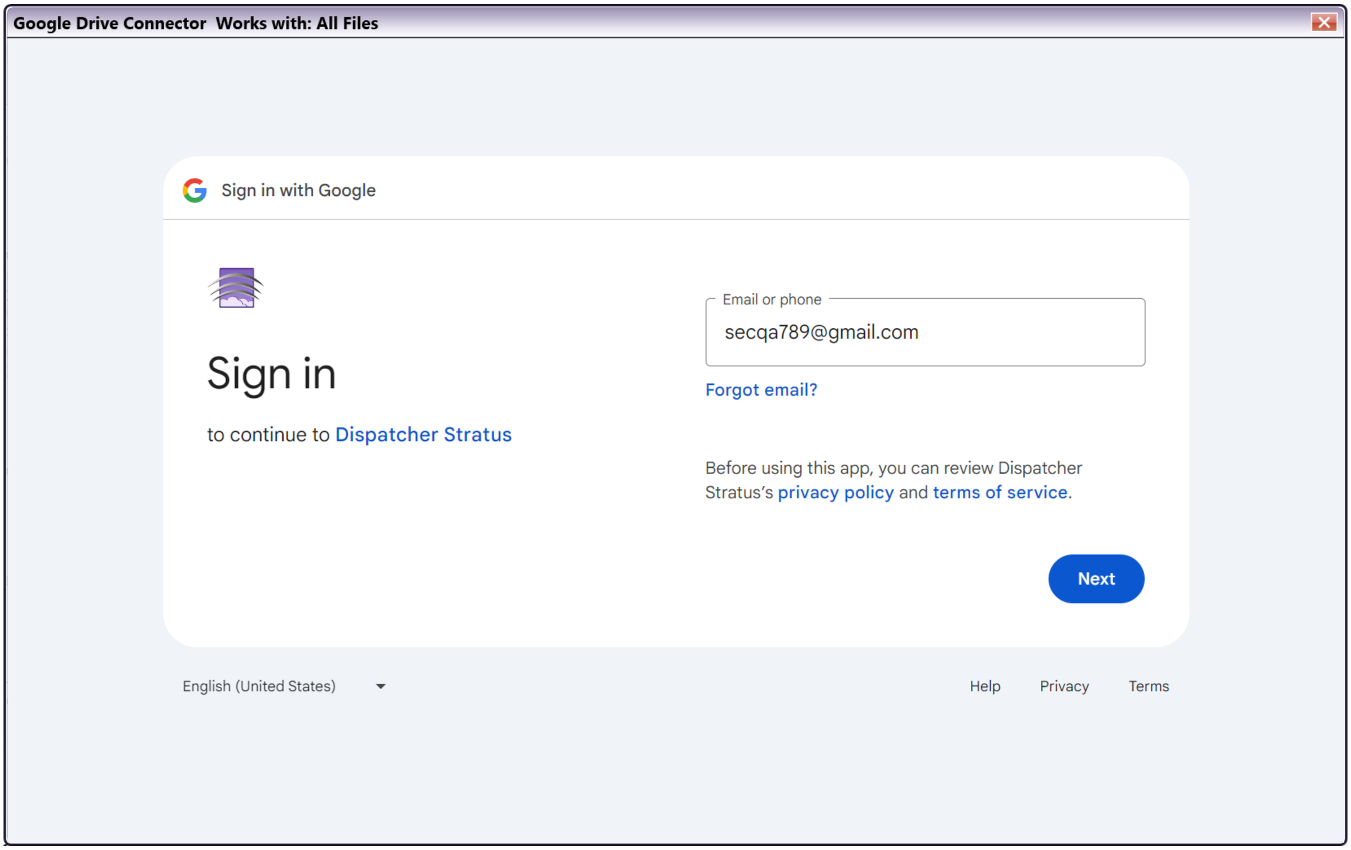
- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Authorization

To use this node in a workflow, you must connect it to a Google Drive account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a Google Drive account, do the following:

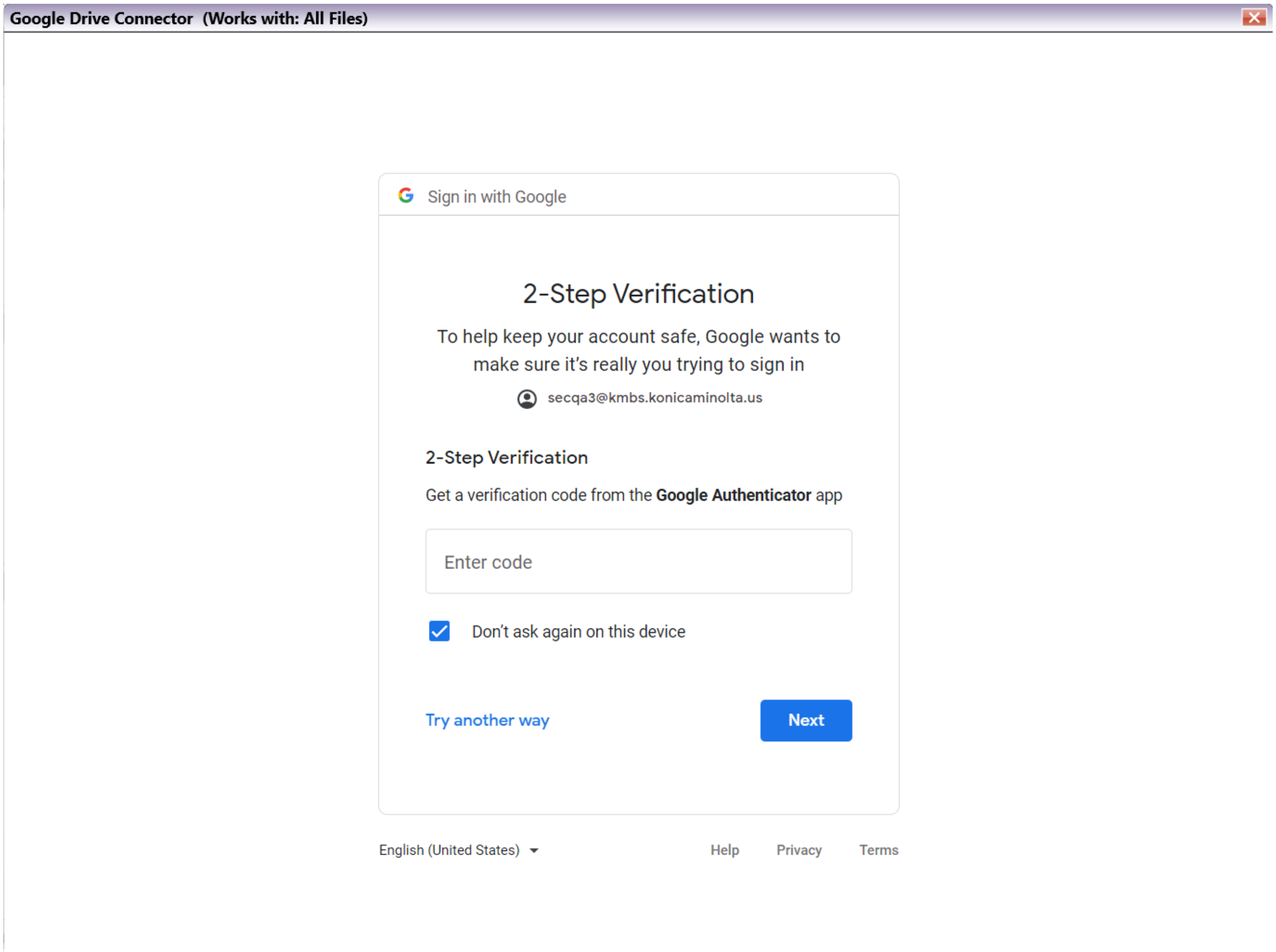
To connect to Google Drive, do the following:

1. Select **Add Account**. The Google Drive login window appears:



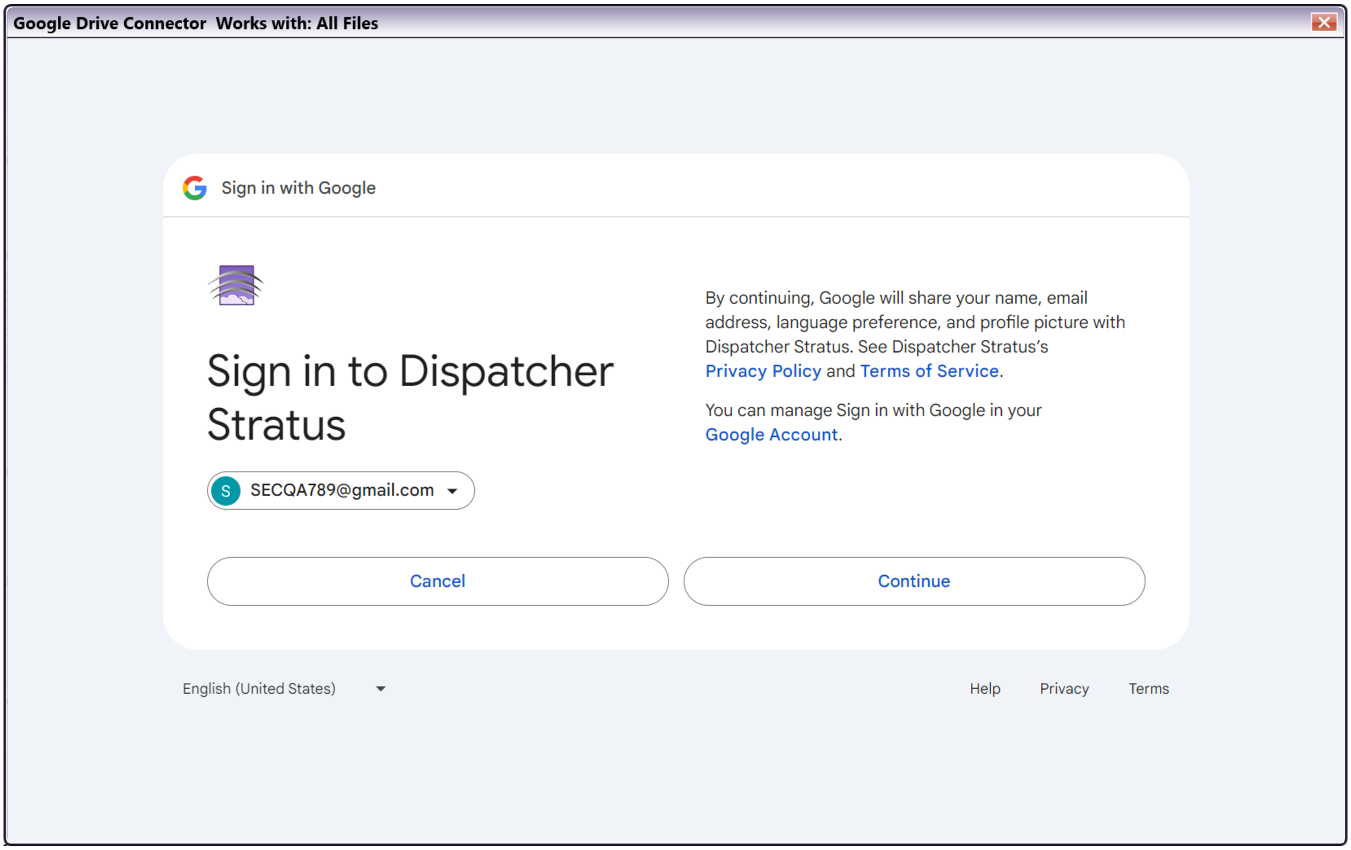
2. Enter the login information for the Google Drive account. Then, click **Next**.

3. If 2-Step Verification is configured for the account, enter the 2-Step Verification Code.

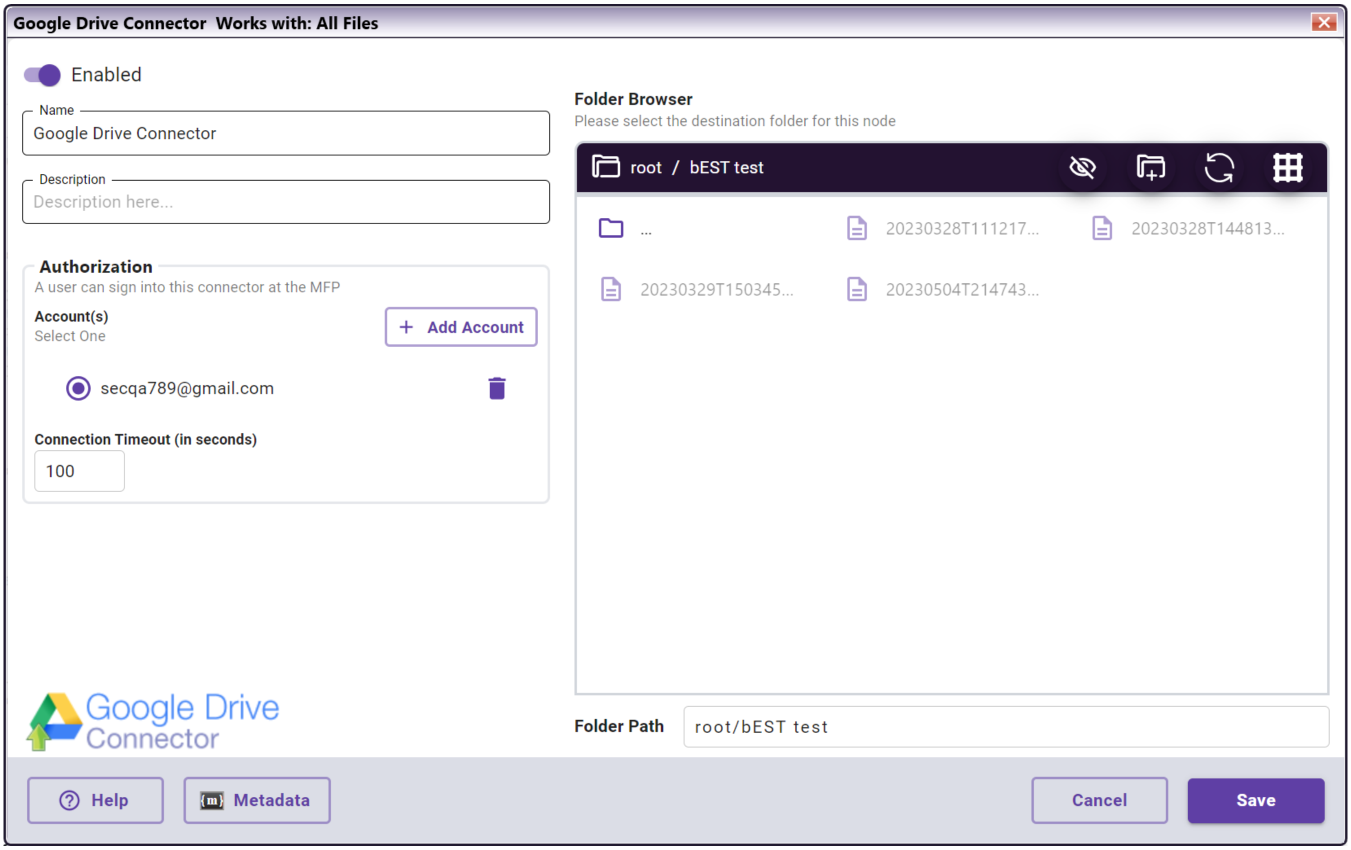


Note: You may be prompted a second time to give Google Drive permissions. If prompted, select all boxes to give the node access to your Google Drive account. Click **Continue** again.

4. To grant Dispatcher ScanTrip Cloud access to your Google Drive account, select **Continue**.



You return to the Google Drive Connector.

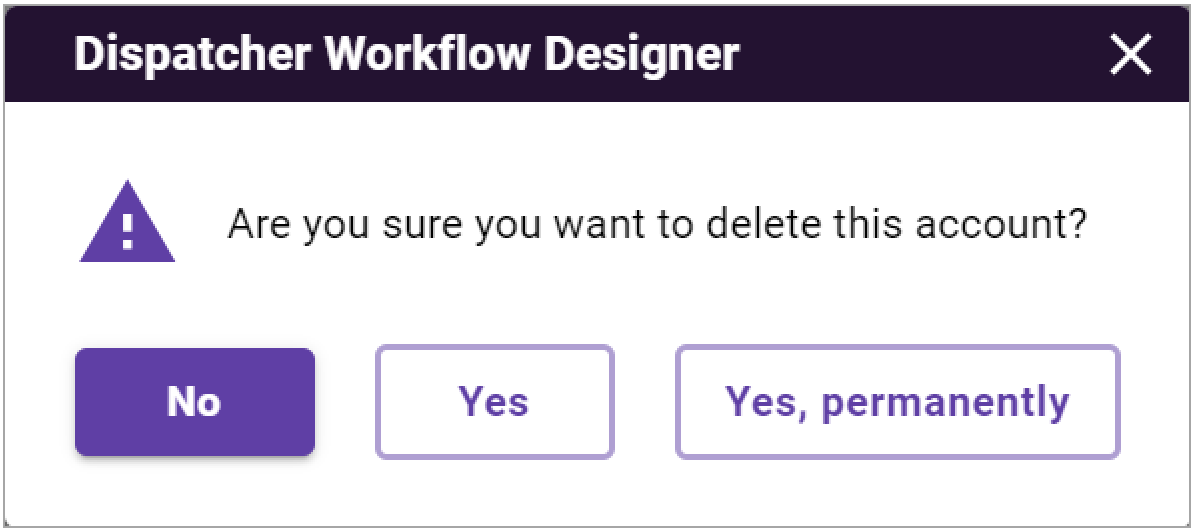


5. If multiple accounts are available, select the radio button next to the desired account.
6. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Important! Some older MFP models encounter issues when adding a Google account at the MFP. To avoid this issue, we recommend that you add all Google accounts here, within the node configuration window, rather than at the MFP.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:

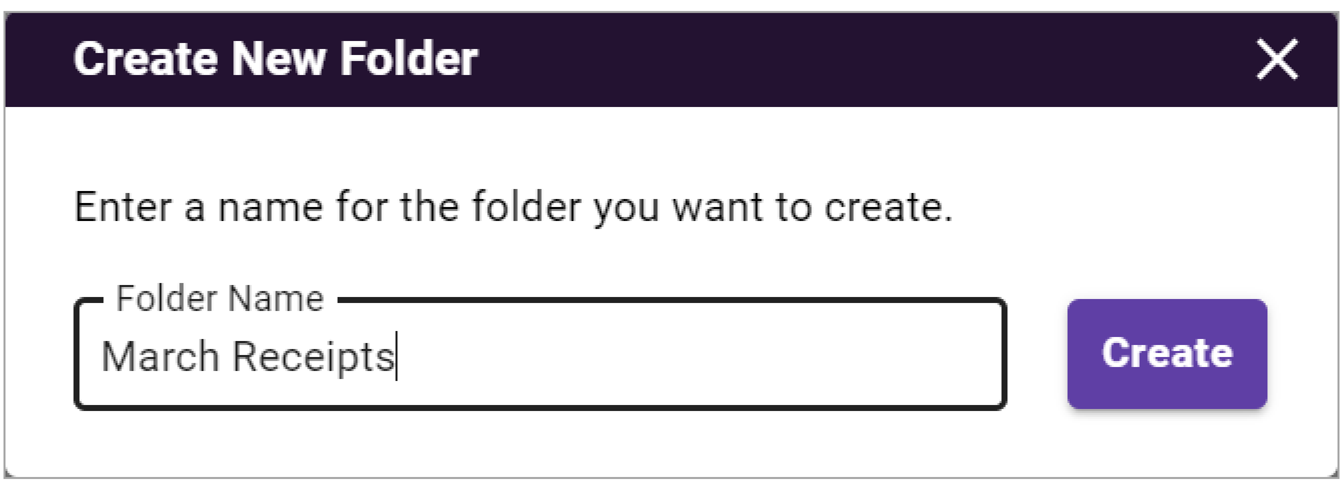


- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

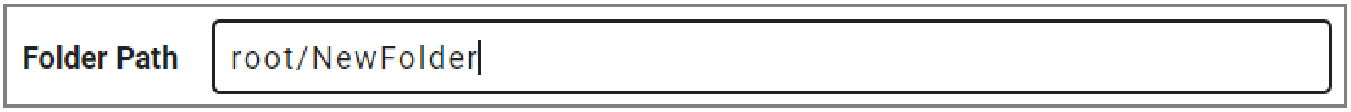
Sending Documents to a New Folder

To create a new folder in Google Drive, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the Google Drive account. The Google Drive Connector will automatically create any new folders and then upload the document(s) to that location.



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 < > : " / \ | ? * .

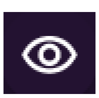
Folder Name Restrictions

While Google Drive does not have many restrictions on folder naming, there are some characters that are not compatible with how Dispatcher ScanTrip Cloud creates folders, which can cause node validation errors with folder names that Google Drive finds acceptable. These characters are:

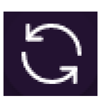
- Back slash \ and forward slash /

View Options

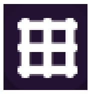
The toolbar in the Folder Browser area provides the following view options for your Google Drive folders:

-  **Show/Hide Files**: Click this button to show or hide files stored in Google Drive folders.

  When you have selected to **Hide Files**, you will only see folders.

-  **Refresh**: Click this button to refresh the current view with the most up-to-date

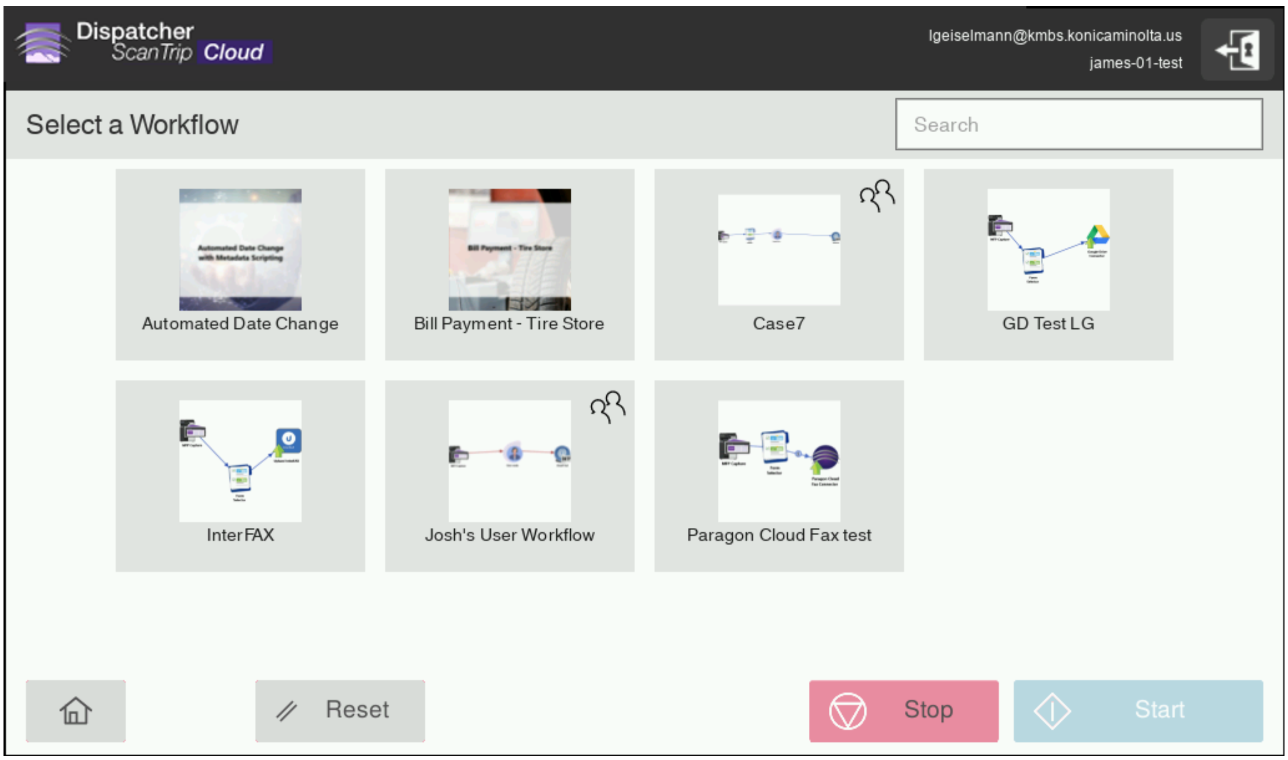
  folders/files.

-  **Change View**: Click this button to change from list view to grid view and back.

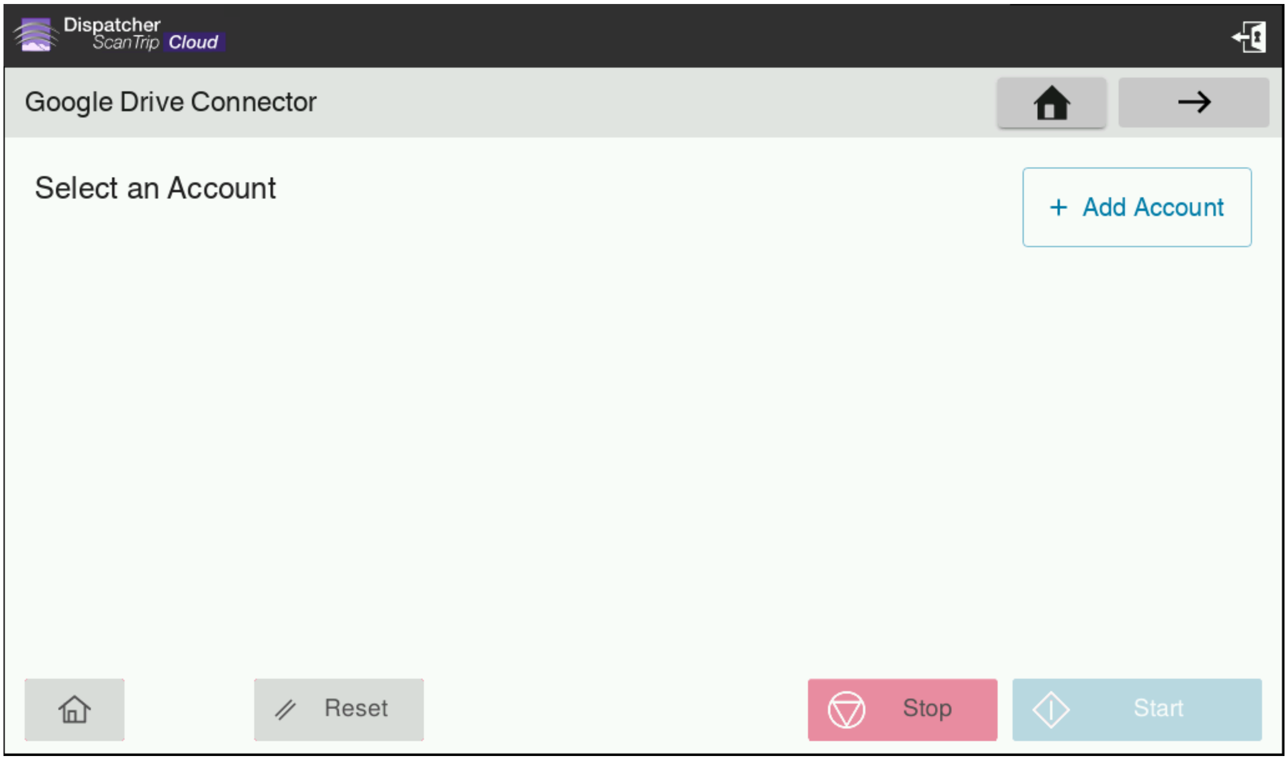
Accessing Google Drive on MFP

At the MFP, take the following steps:

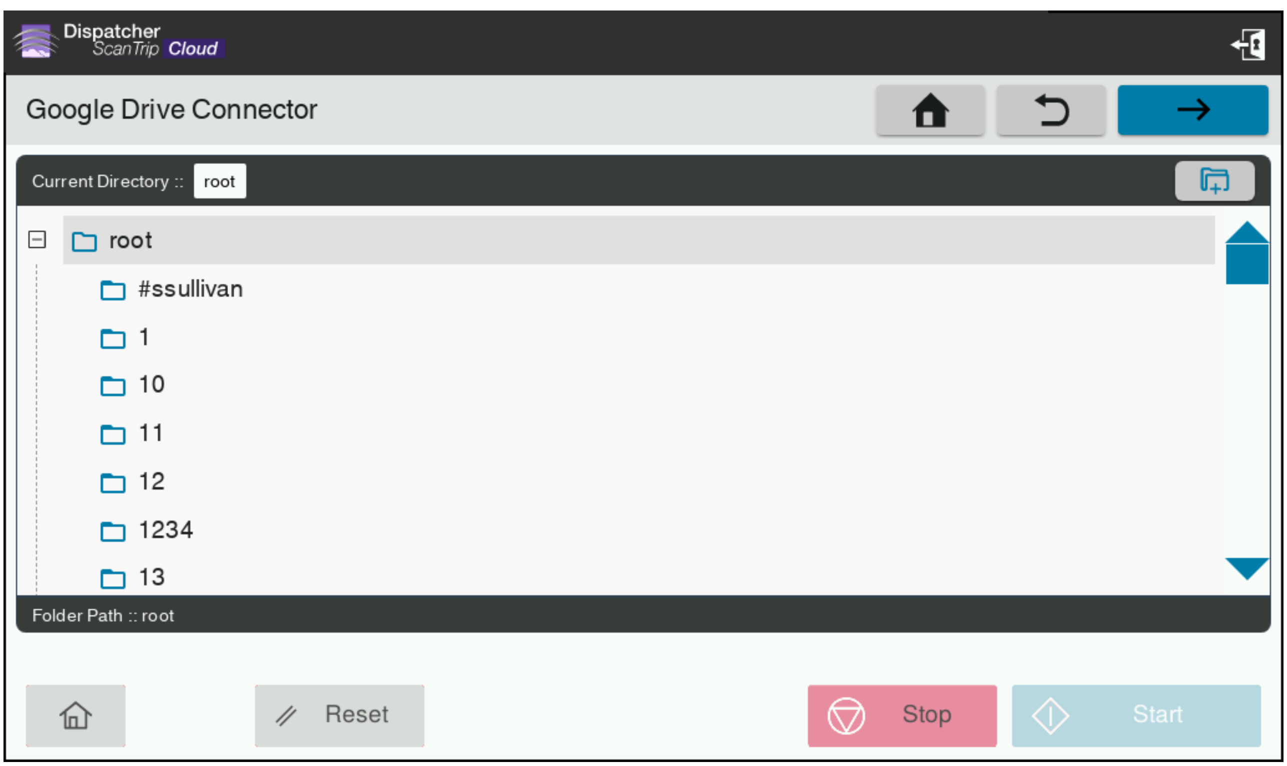
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow. See the following illustration:



2. **Scan your document** - Use the MFP to scan your document. Options available are dependent upon the options selected in the **MFP Capture** node. If a **Form Selector** node has been configured, continue to step 3. Otherwise, skip to step 5.
3. **Enter your login credentials** - If a Google Drive account has not already been selected during node setup, you will need to tap the **+ Add Account** button to add your Google Drive account before entering your login credentials. Enter your **Username** and **Password** on the appropriate screens.



4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder. See the following illustration:

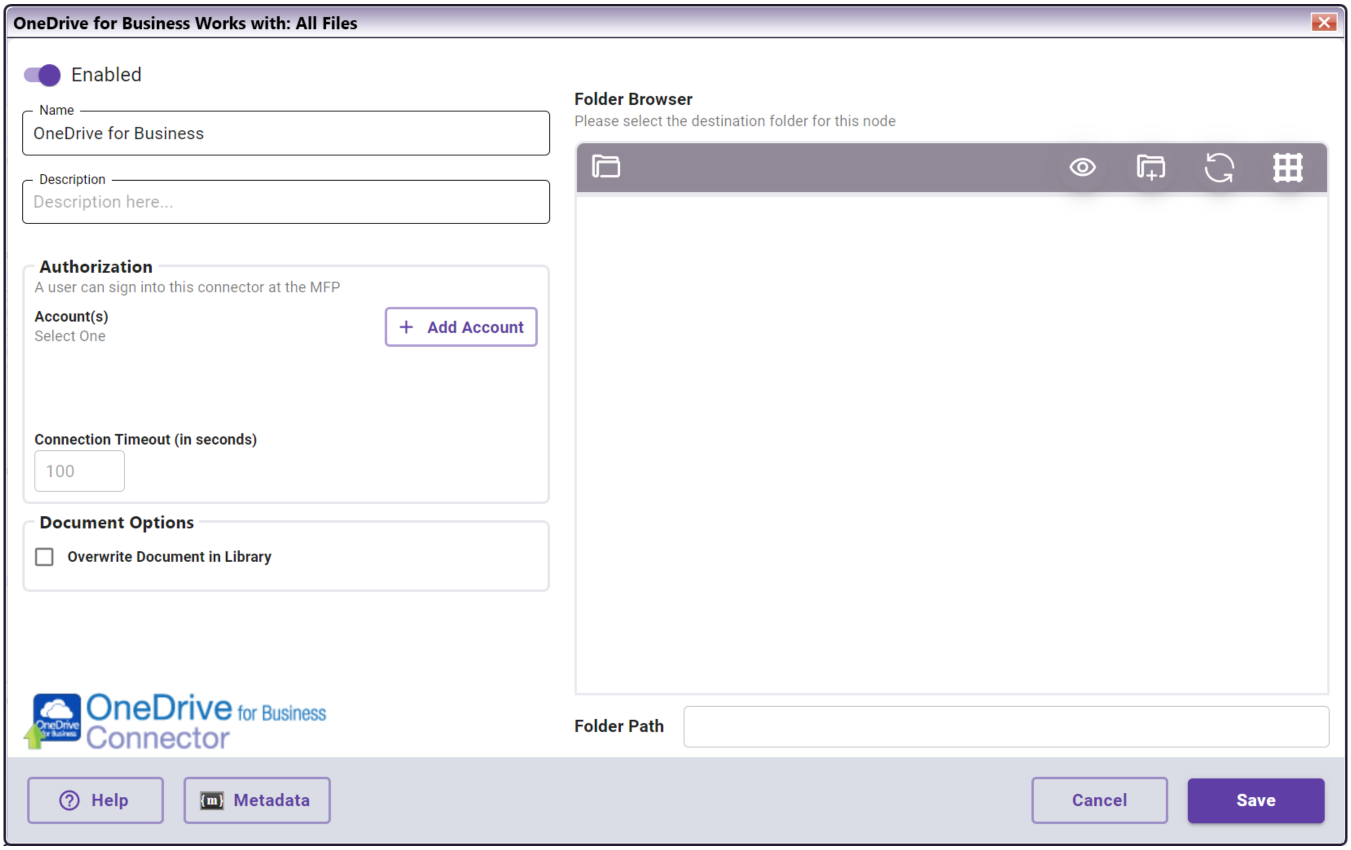


5. **Select the “Scan” button** - This sends the scanned document to the selected Google Drive account and folder.

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.

Note: To use the OneDrive for Business Connector node, you must have a OneDrive for Business account.



Configuring the OneDrive for Business Connector

To open the node's configuration window (shown above), add a OneDrive for Business Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.
- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.
- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

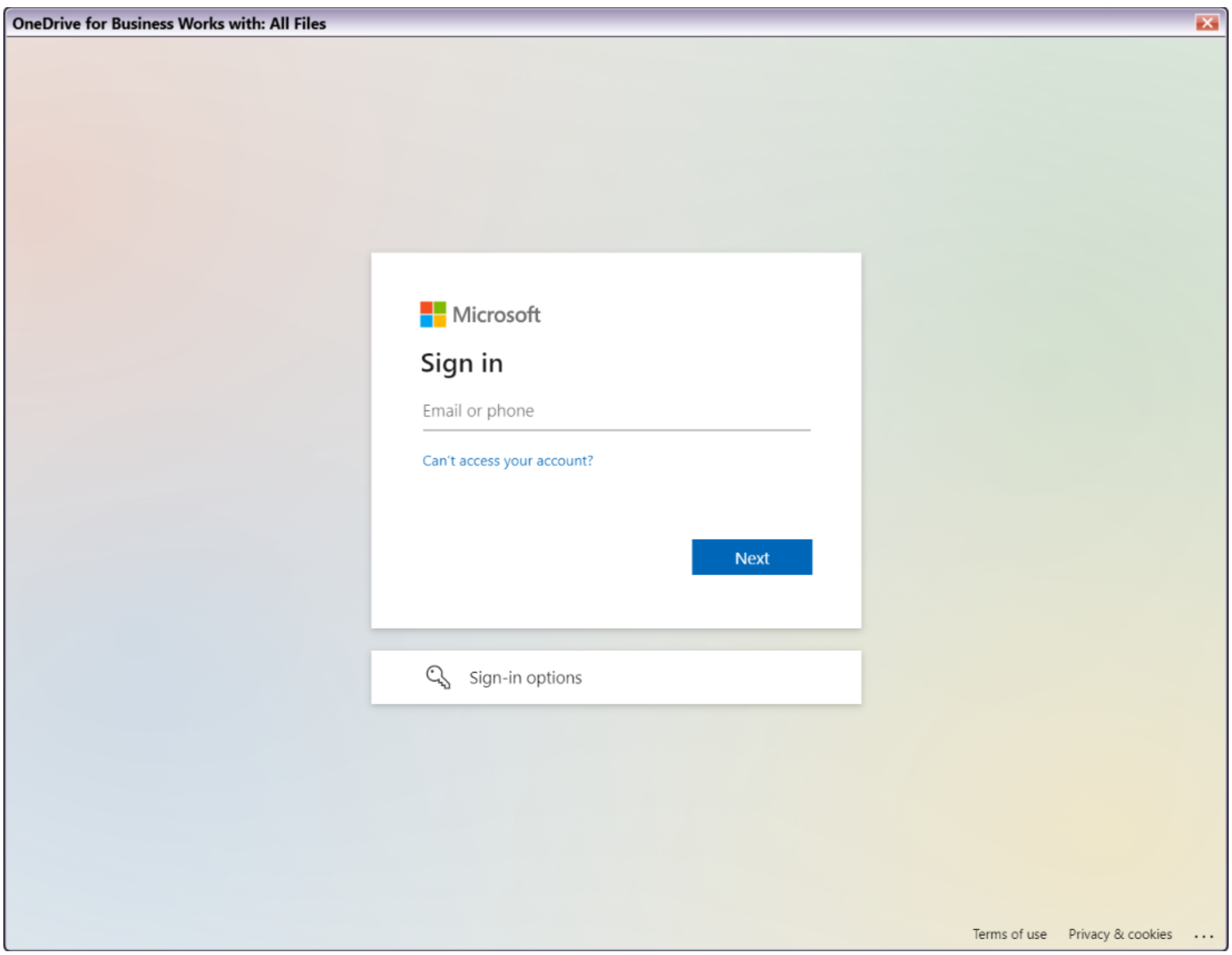
Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

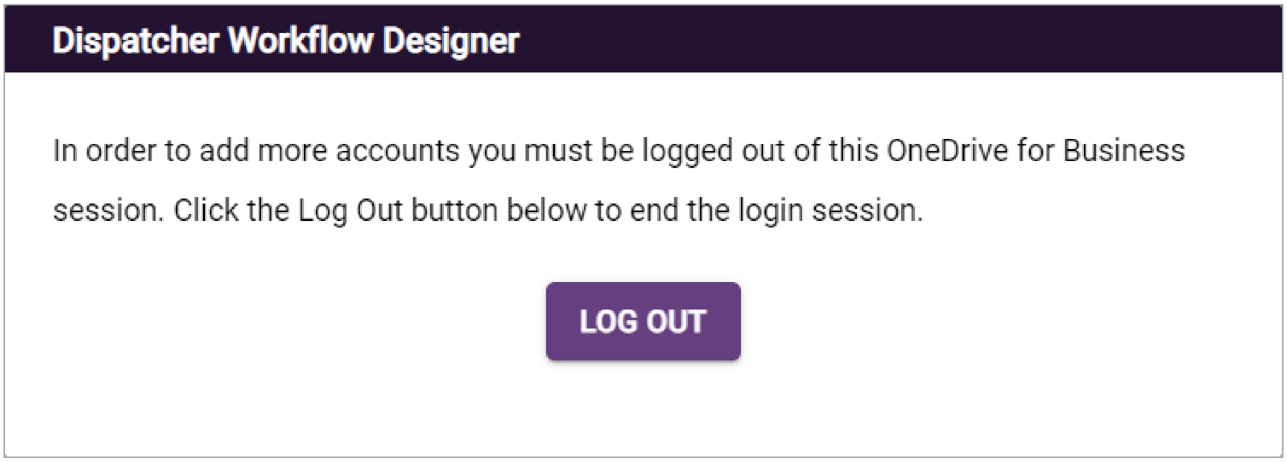
Authorization

To use this node in a workflow, you must connect it to a OneDrive for Business account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a OneDrive for Business account, do the following:

1. Select **Add Account**. The OneDrive for Business login window appears:



2. Enter the login information for the OneDrive for Business account. Then, select **Sign in**. You return to the OneDrive for Business Connector node.

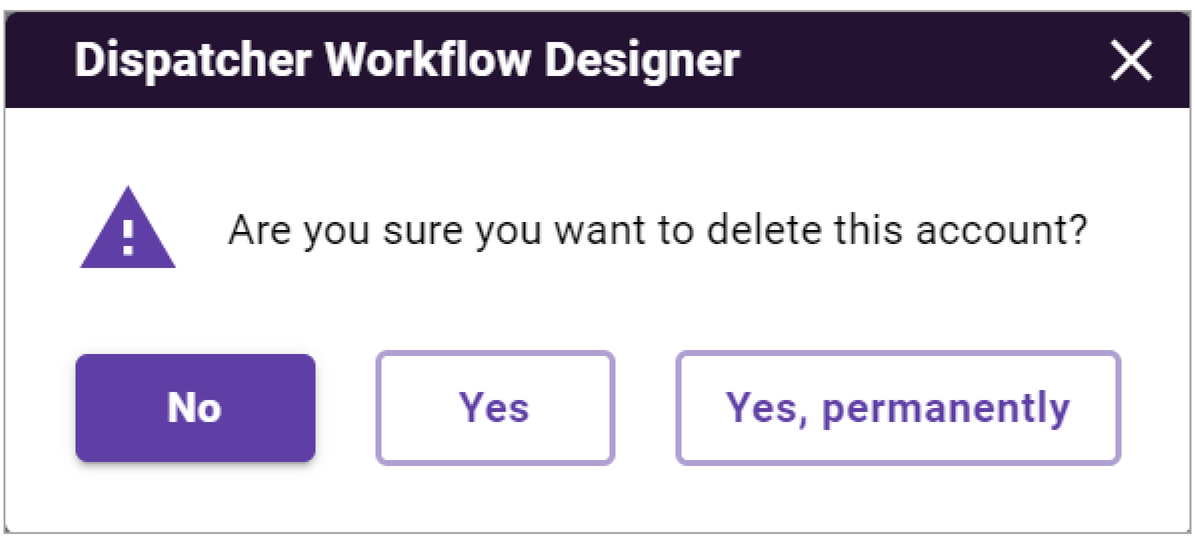


Note: You can add only one OneDrive for Business account per session. To add another OneDrive for Business account, you must save the node and reopen it.

4. If multiple accounts are available, select the radio button next to the desired account.
5. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:



- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.

- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

Document Options

In the Document Options area, you can update certain aspects of documents that pass through the node.

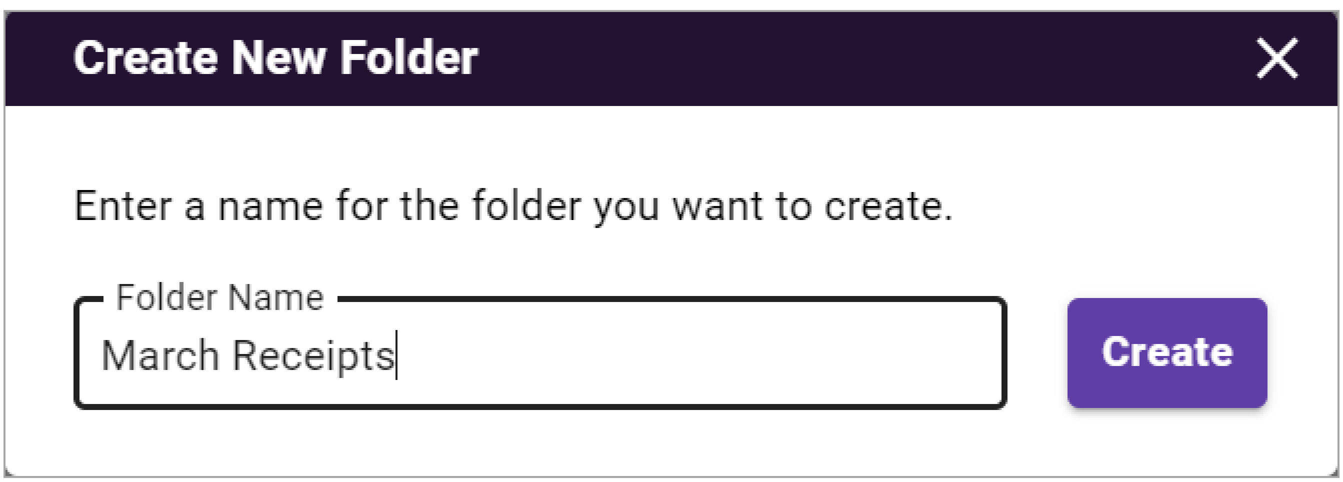
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to OneDrive for Business with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both versions.

Customizing the OneDrive for Business Connector Node

Once connected to a OneDrive for Business account, the Folder Browser area populates with a tree-view of your OneDrive for Business folders, sub-folders, and files. Browse through your OneDrive for Business folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

Sending Documents to a New Folder

To create a new folder in OneDrive for Business, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the OneDrive for Business account. The OneDrive for Business Connector node will automatically create any new folders and then upload the document(s) to that location.

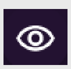
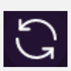
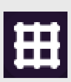
File and Folder Name Restrictions

The following restrictions apply to file and/or folder 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 < > : " / \ | ? *
- File names cannot only be a tilde (~). However, a tilde can be used in a file name along with other characters, including a file extension.
- The metadata key `{workflow:modified}` cannot be used in the folder path, because the resolved value contains a colon (:).

View Options

The toolbar in the Folder Browser area provides the following view options for your OneDrive for Business folders:

Icon	Name	Description
	**Show/Hide Files**	Click this button to show or hide files stored in OneDrive for Business folders. When you have selected to **Hide Files**, you will only see folders.
	**Refresh**	Click this button to refresh the current view with the most up-to-date folders/files.
	**Change View**	Click this button to change from list view to grid view and back.

Accessing OneDrive for Business at the MFP

At the MFP, take the following steps:

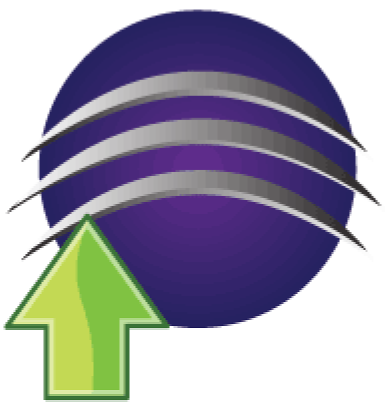
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Options available are dependent upon the options selected in the **MFP Capture** node. If a **Form Selector** node has been configured, continue to step 3. Otherwise, skip to step 5.

3. **Enter your login credentials** - If a OneDrive for Business account has not already been selected during node setup, you will need to tap the **Add Account** button to add your OneDrive for Business account before entering your login credentials.

4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.

5. **Select the “Scan” button** - This sends the scanned document to the selected OneDrive for Business account and folder.

Paragon Cloud Fax Connector



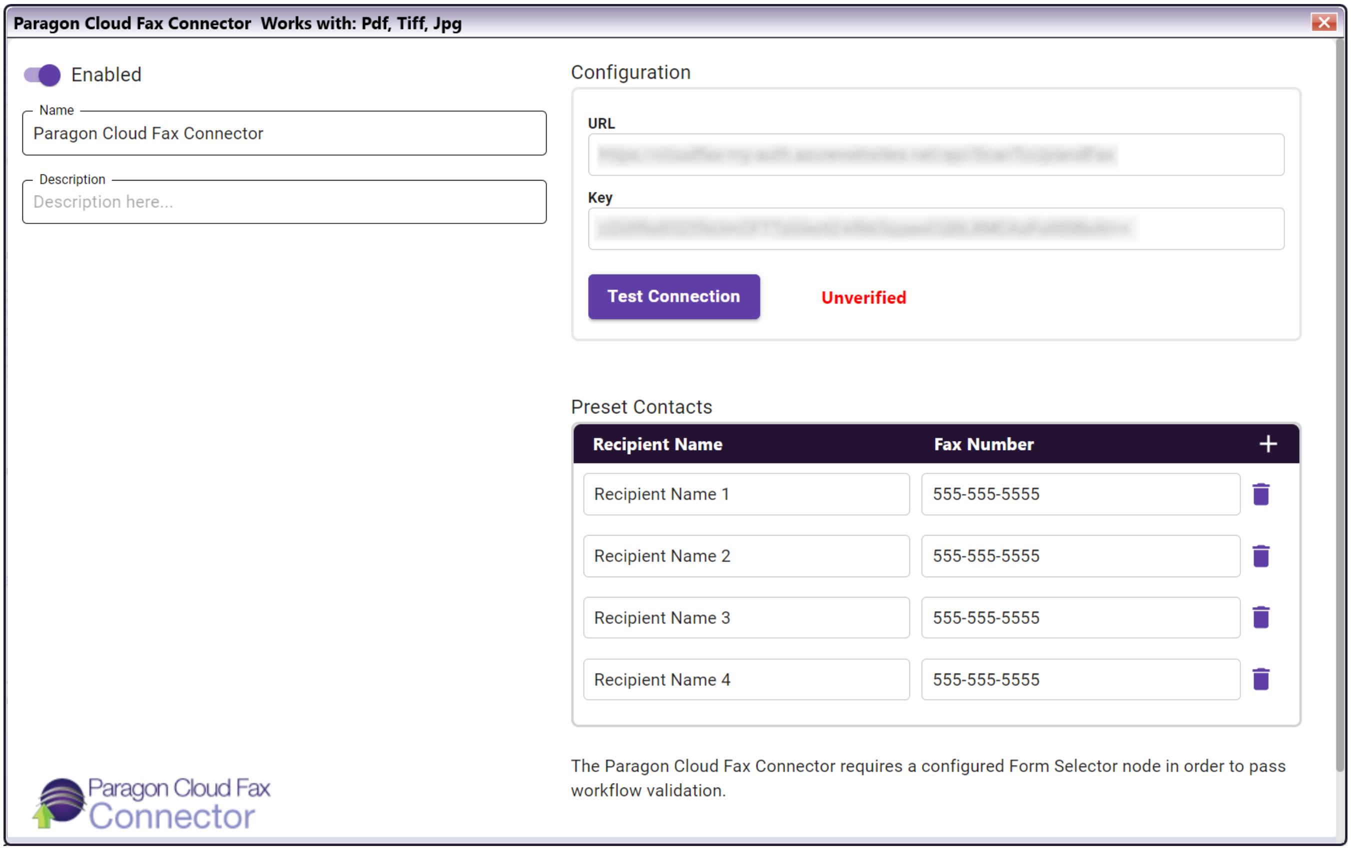
The **Paragon Cloud Fax Connector** is designed to allow users to send documents from a workflow through the Paragon cloud-based online fax service. Using the Paragon Cloud Fax Connector, you can do the following:

- Connect to a Paragon Cloud Fax server.
- Enter specific recipients during node configuration.
- Use workflow metadata to specify fax recipients.
- Use form capture to specify fax recipients.

Important! The **Paragon Cloud Fax Connector** works ONLY when combined with the **Form Selector** node and the fax connection capabilities of **Dispatcher Paragon**. For more information about **Dispatcher Paragon**, contact your Konica Minolta representative.

Notes:

- The **Paragon Cloud Fax Connector** can process individual files of up to 8 MB and can fax files with a total of up to 20 MB.
- When used in a workflow with an **MFP Capture** node configured with the “Keep Blank Pages” option, scanned documents with a blank page at the end will be delivered without the last blank page. If there are multiple blank pages at the end, only the last blank page is not delivered.



Configuring the Paragon Cloud Fax Connector

To open the node's configuration window (shown above), add a distribution node for Paragon Cloud Fax Connector to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.

- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

Buttons

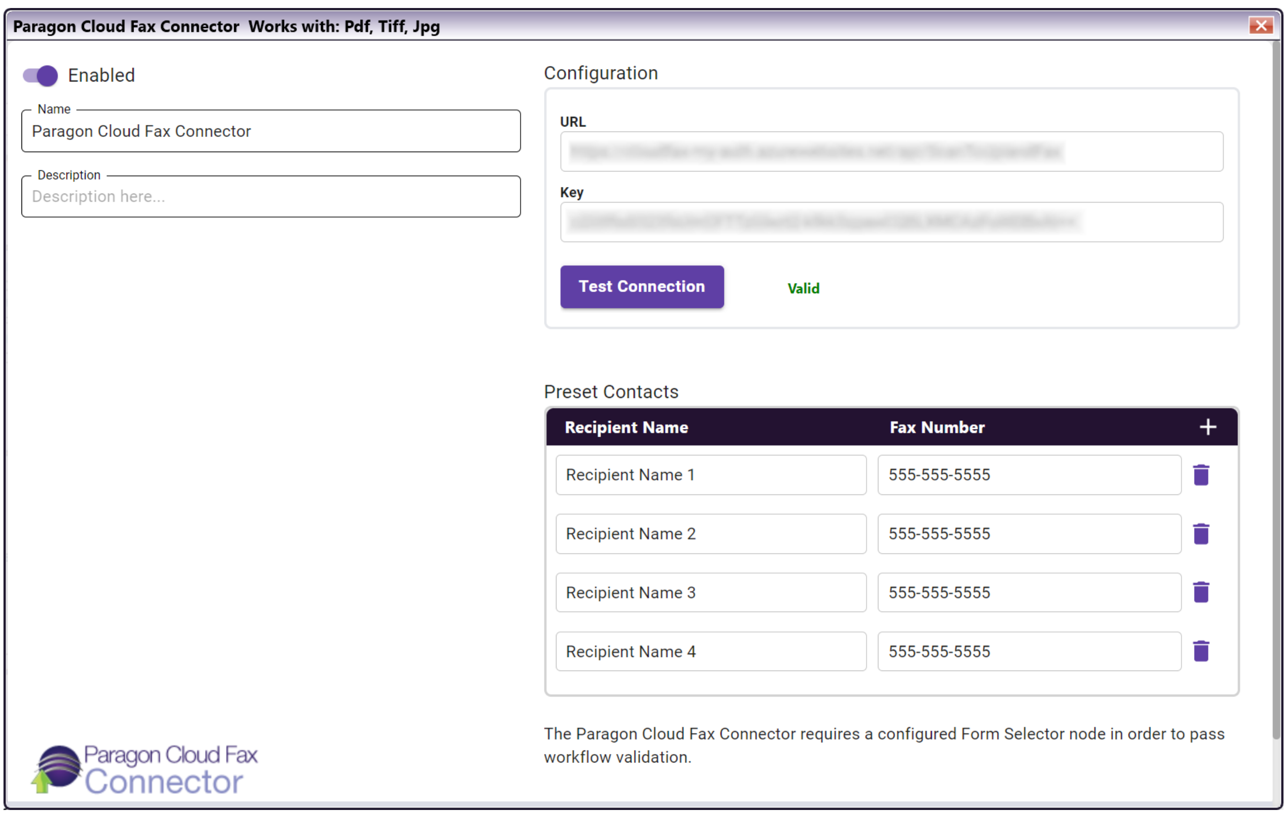
- **Help** - To access Dispatcher ScanTrip Cloud Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.

Application Setup

Important! The **Paragon Cloud Fax Connector** requires a configured **Form Selector** node in order to pass workflow validation.

To begin, you must first connect to the Paragon Cloud Fax Server. In the Configuration area, do the following:

1. In the **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.



Within the **Paragon Cloud Fax Connector**, you can add contact to a phonebook to select at the MFP. To add contacts, do the following:

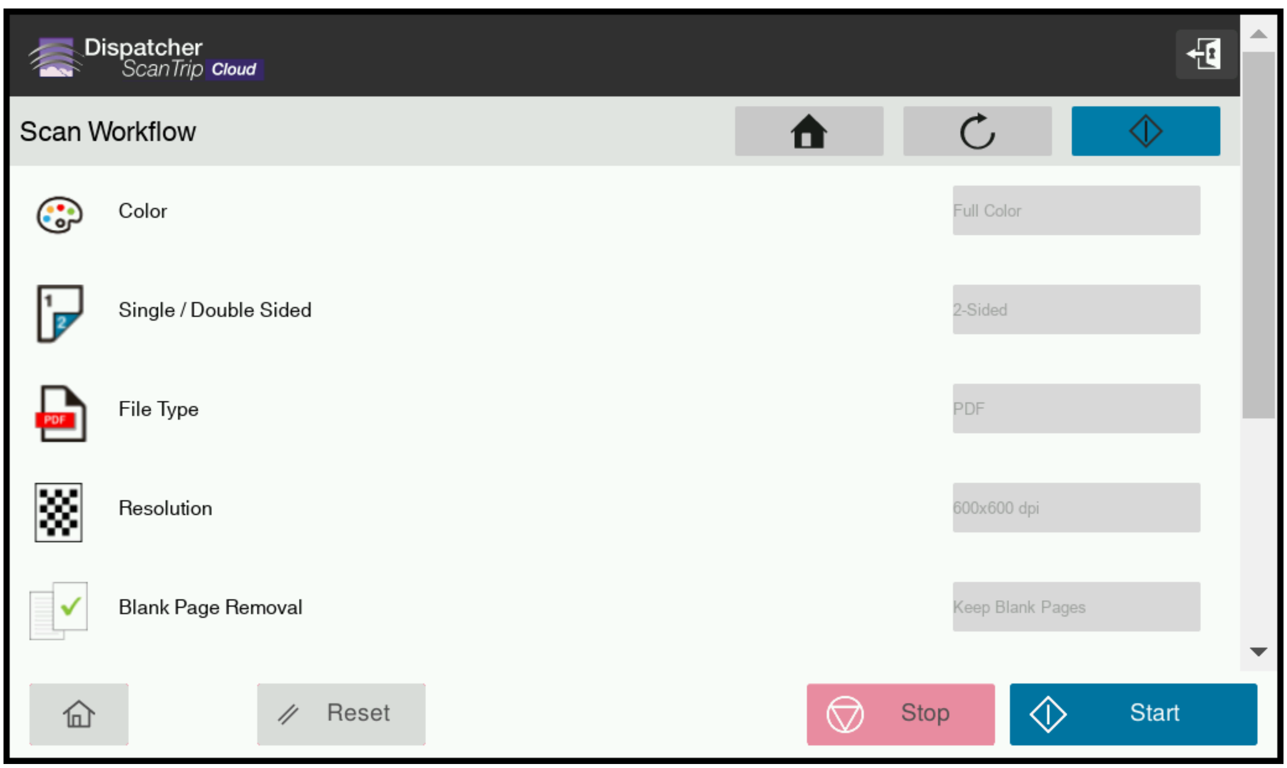
1. Edit the Recipient Name field with a friendly name for the fax contact.
2. Edit the Fax Number field with a fax number for the contact.
3. Select the **Save** button to save all changes and close the node.

You can add additional contacts to the phonebook by selecting the icon. You can delete unneeded phonebook contacts by selecting the icon.

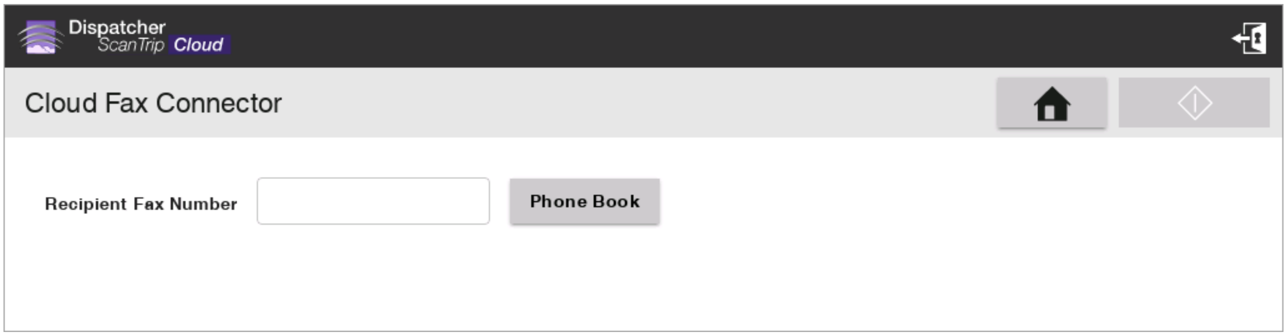
Paragon Cloud Fax Connector at the MFP

At the MFP, take the following steps:

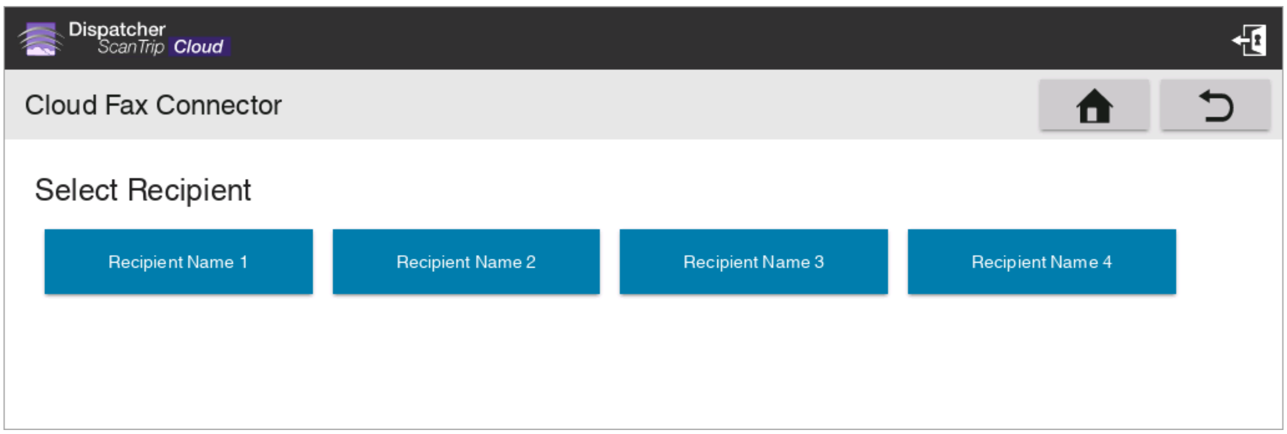
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Edit your scan settings** - Update any scan settings necessary, as in the following illustration:



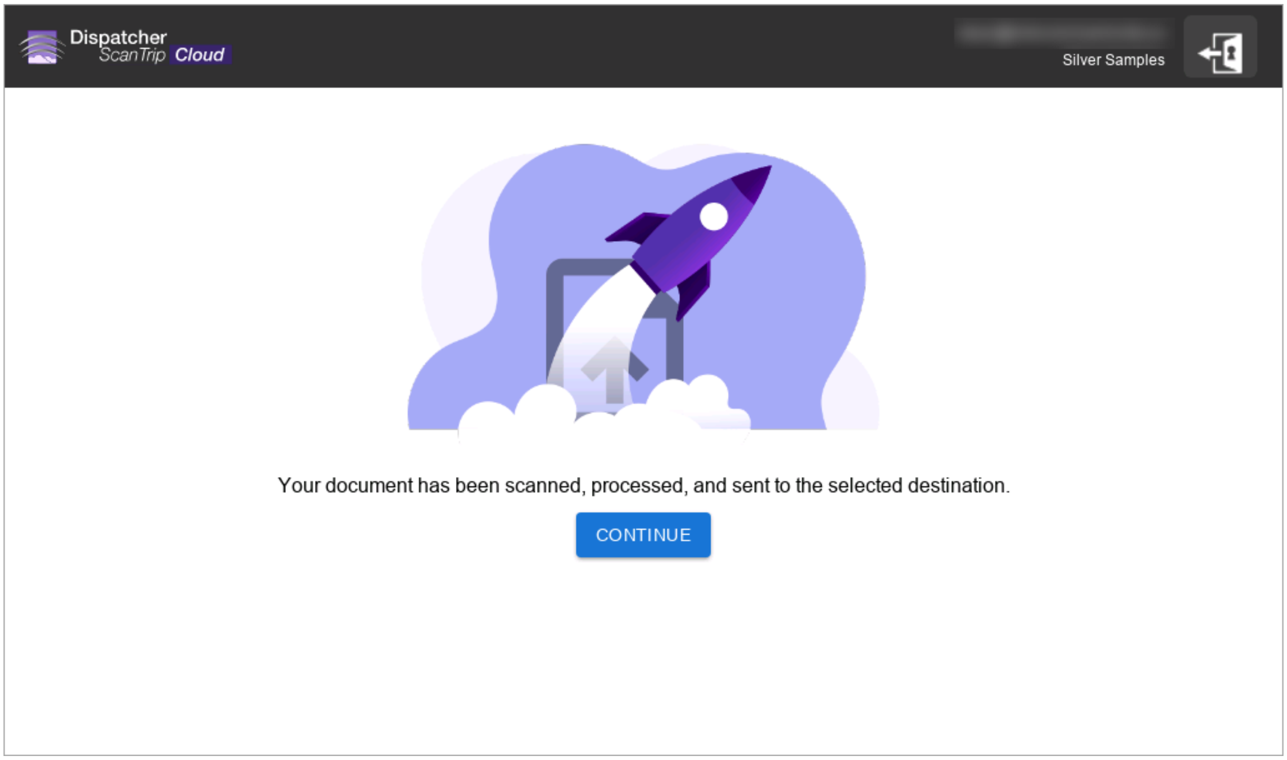
3. **Scan your document** - Your document will be scanned and, if the Preview option is enabled, you will see a preview of the scanned document.
4. **Enter the recipient’s fax number** - After scanning, you will be prompted to enter a fax number.



This can be accomplished manually or by tapping the **Phone Book** button. Tapping the **Phone Book** button brings you to the pre-configured phone book.



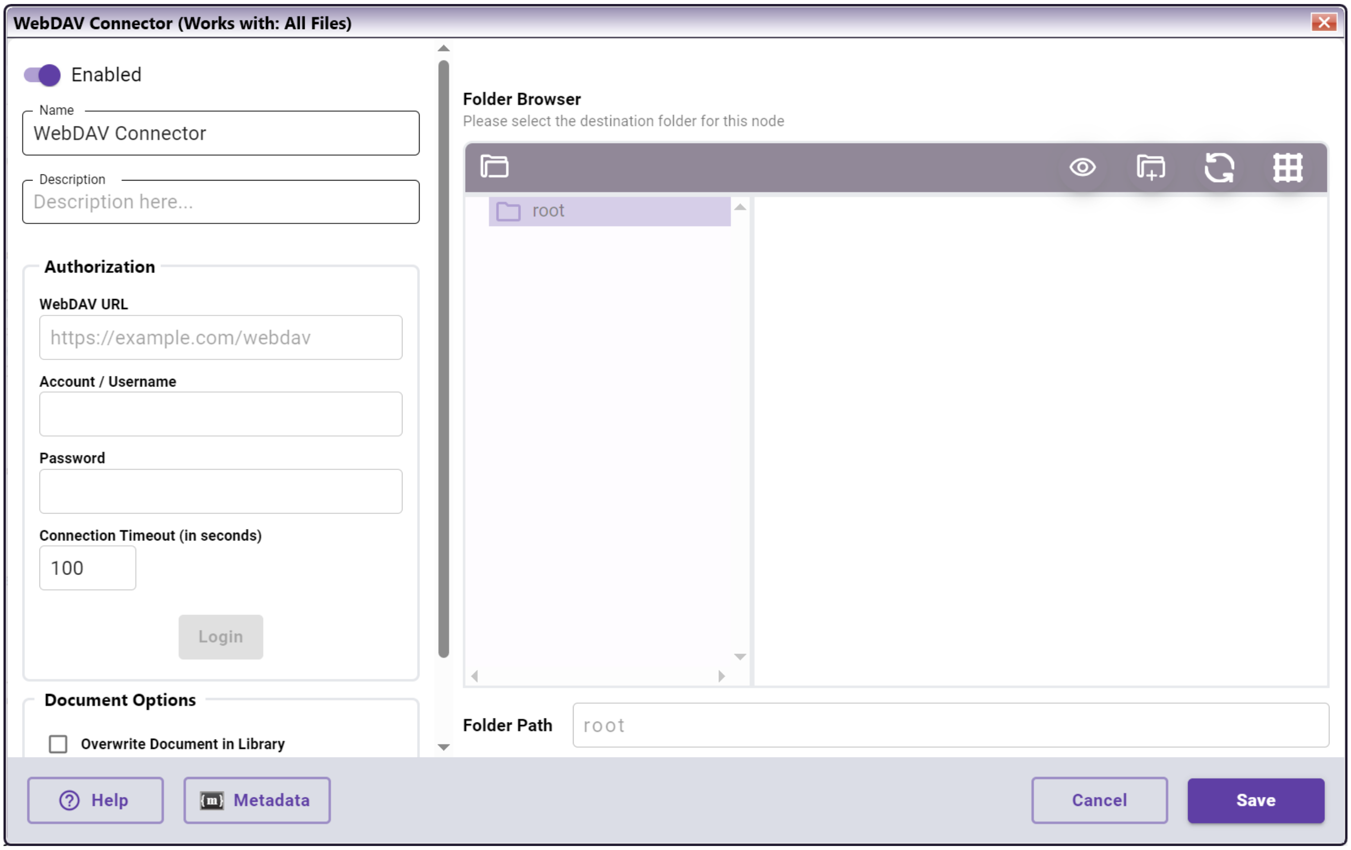
5. **Fax your document** - Your document will be automatically sent to the selected fax number.



WebDAV Connector

WebDAV (Web-based Distributed Authoring and Versioning) is a standard protocol allowing users to access files on remote web servers. The Dispatcher ScanTrip Cloud 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.

Note: To use the WebDAV Connector, you must have access to a WebDAV server.



Configuring the WebDAV Connector

To open the node's configuration window (shown above), add a WebDAV Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.

- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

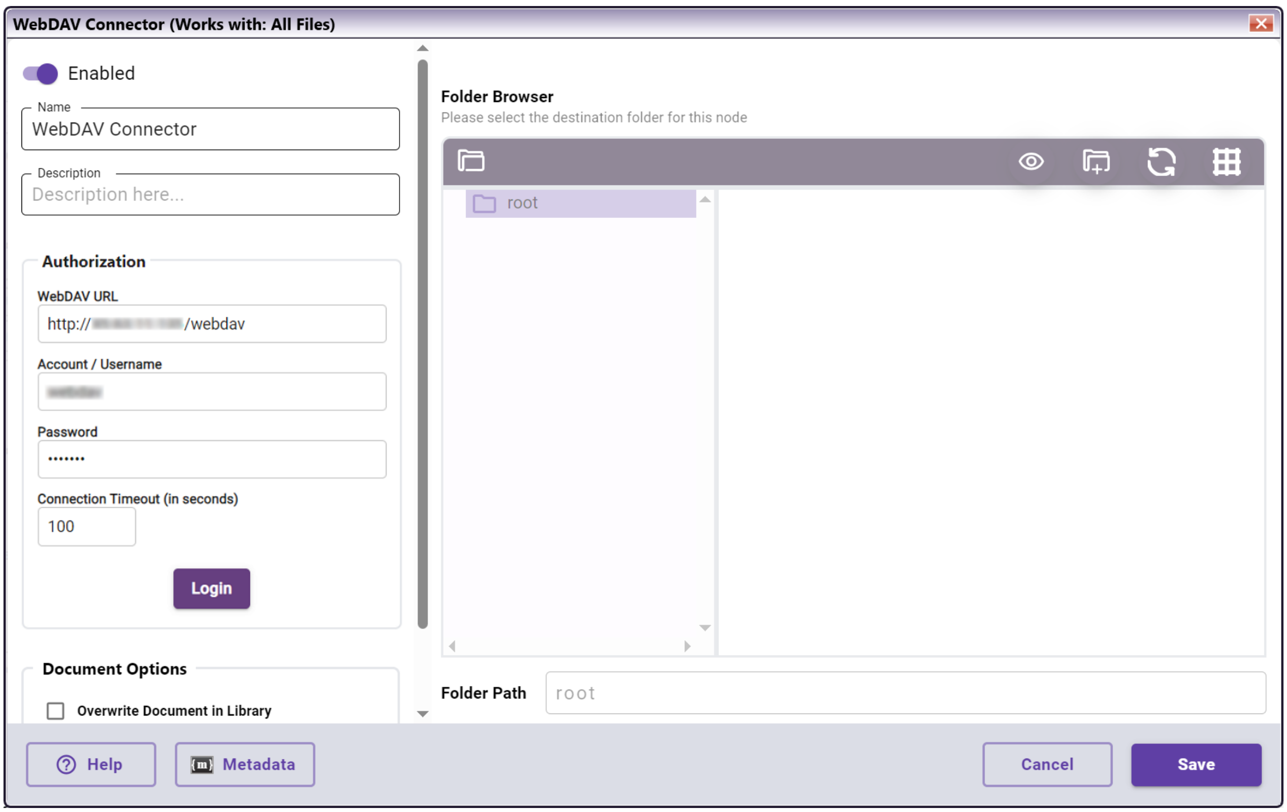
Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

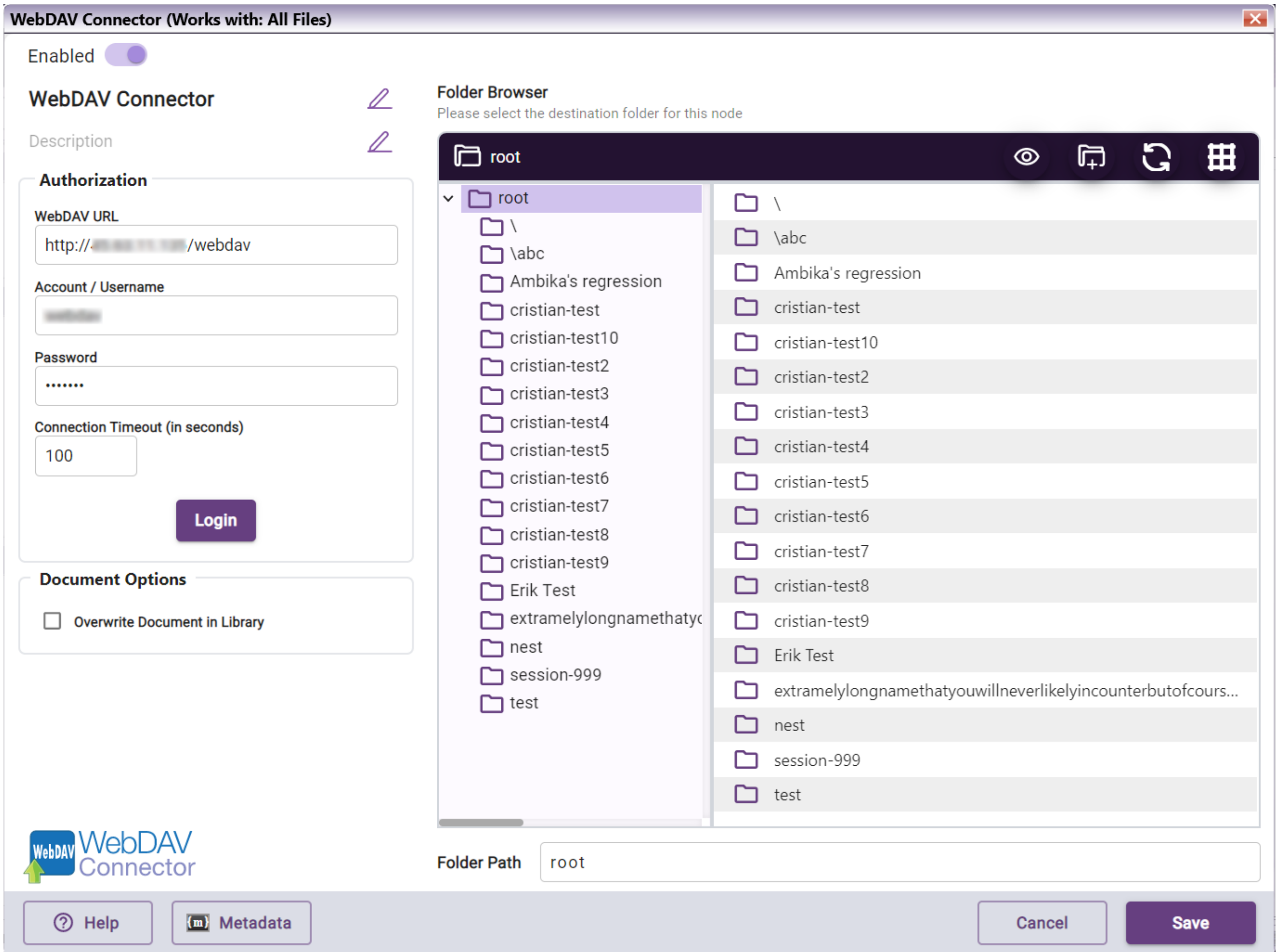
Authorization

To connect to WebDAV, do the following:

1. In the Authorization area, enter the **WebDAV URL**, **Account/Username**, and **Password** of the WebDAV server.



2. Select **Login**.



You return to the WebDAV Connector.

To modify the default Connection Timeout (the number of seconds the system is allowed to attempt to connect with the specified account), enter a value in the **Connection Timeout** field.

Document Options

In the Document Options area, you can update certain aspects of documents that pass through the node.

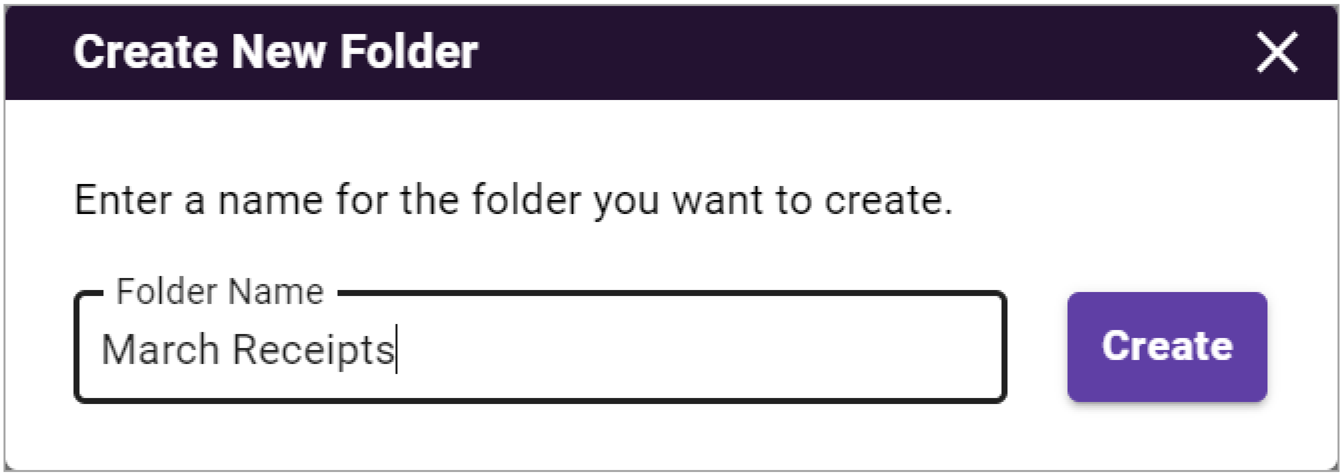
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to WebDAV with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both versions.

Customizing the WebDAV Connector Node

Once connected to a WebDAV account, the Folder Browser area populates with a tree-view of your WebDAV folders, sub-folders, and files. Browse through your WebDAV folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

Sending Documents to a New Folder

To create a new folder in WebDAV, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser.

You can also type in a folder path that includes one or more folders that do not currently exist within the WebDAV account. The WebDAV Connector will automatically create any new folders and then upload the document(s) to that location.

File Name Restrictions

The following restrictions apply to file names:

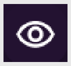
- File names cannot start with a space or end with a space
- You cannot start a file name with two period characters (..)
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use < > : " / \ | ? * ~

Folder Name Restrictions

Folder names cannot contain the ~ (tilde) character.

View Options

You can adjust the default view of your WebDAV folders in the node properties window by using the buttons on the top right-hand side of the window:

Icon	Name	Description
	**Show/Hide Files**	Click this button to show or hide files stored in WebDAV folders. When you have selected to **Hide Files**, you will only see folders.
	**Refresh**	Click this button to refresh the current view with the most up-to-date folders/files.
	**Change View**	Click this button to change from list view to grid view and back.

Accessing WebDAV at the MFP

At the MFP, take the following steps:

1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.

2. **Scan your document** - Use the MFP to scan your document. Options available are dependent upon the options selected in the **MFP Capture** node. If a **Form Selector** node has been configured, continue to step 3. Otherwise, skip to step 5.

3. **Enter your login credentials** - If a WebDAV account has not already been selected during node setup, you will need to tap the **Add Account** button to add your WebDAV account before entering your login credentials.

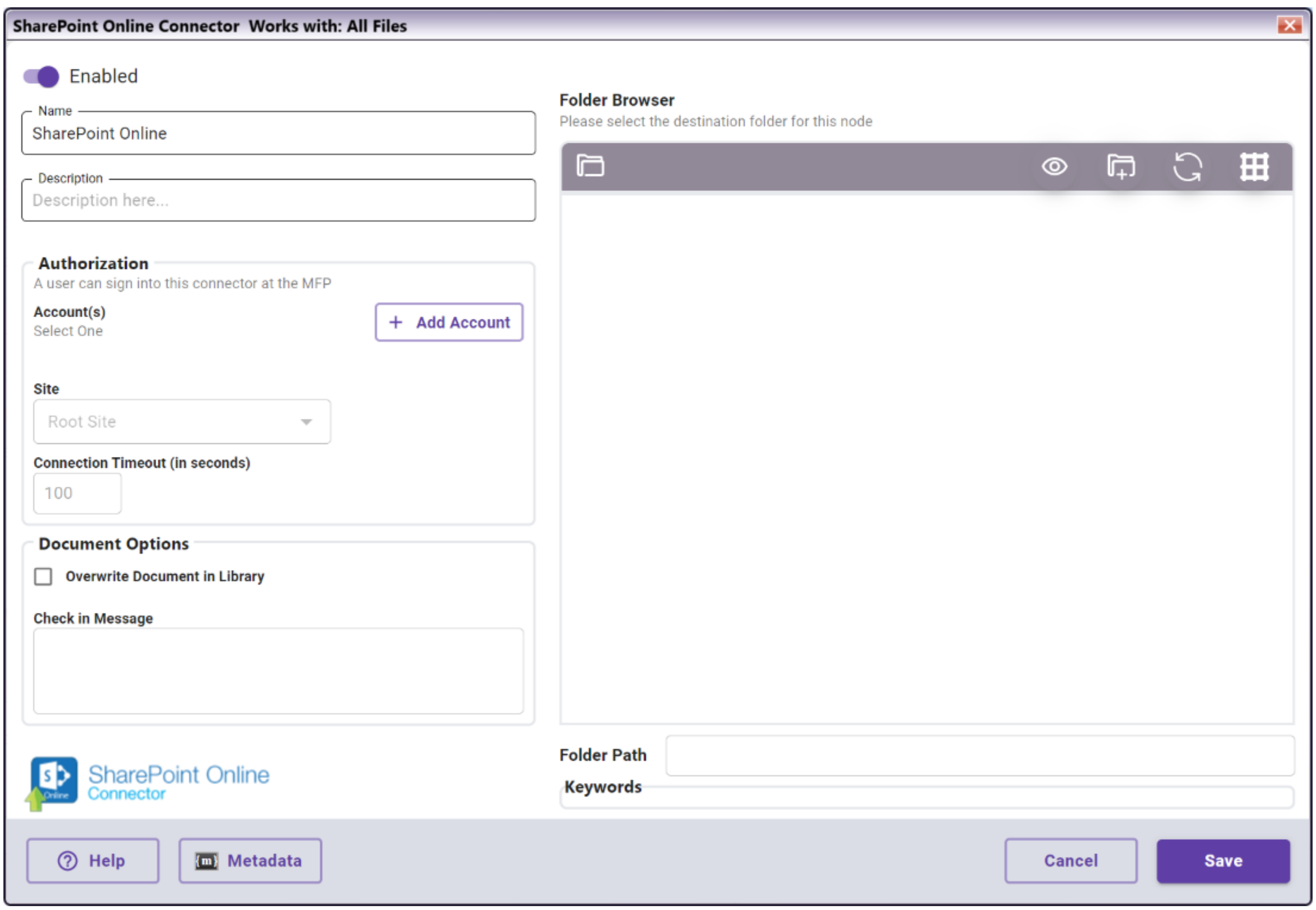
4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.

5. **Select the “Scan” button** - This will send the scanned document to the selected WebDAV account and folder.

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 to SharePoint Online via an automated workflow, or you can access SharePoint Online directly at the MFP panel.

Note: To use the SharePoint Online Connector, you must have a SharePoint Online account.



Configuring the SharePoint Online Connector

To open the node’s configuration window (shown above), add a SharePoint Online Connector distribution node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until “Enabled” displays. The default setting is “Enabled”. If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.
- **Name** - The name in this field appears below the node’s icon in the workflow. The node’s name defaults, but you can edit it. For example, you can specify a name that indicates the node’s function in the workflow.
- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover the mouse over the field to read its entire contents.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

Buttons

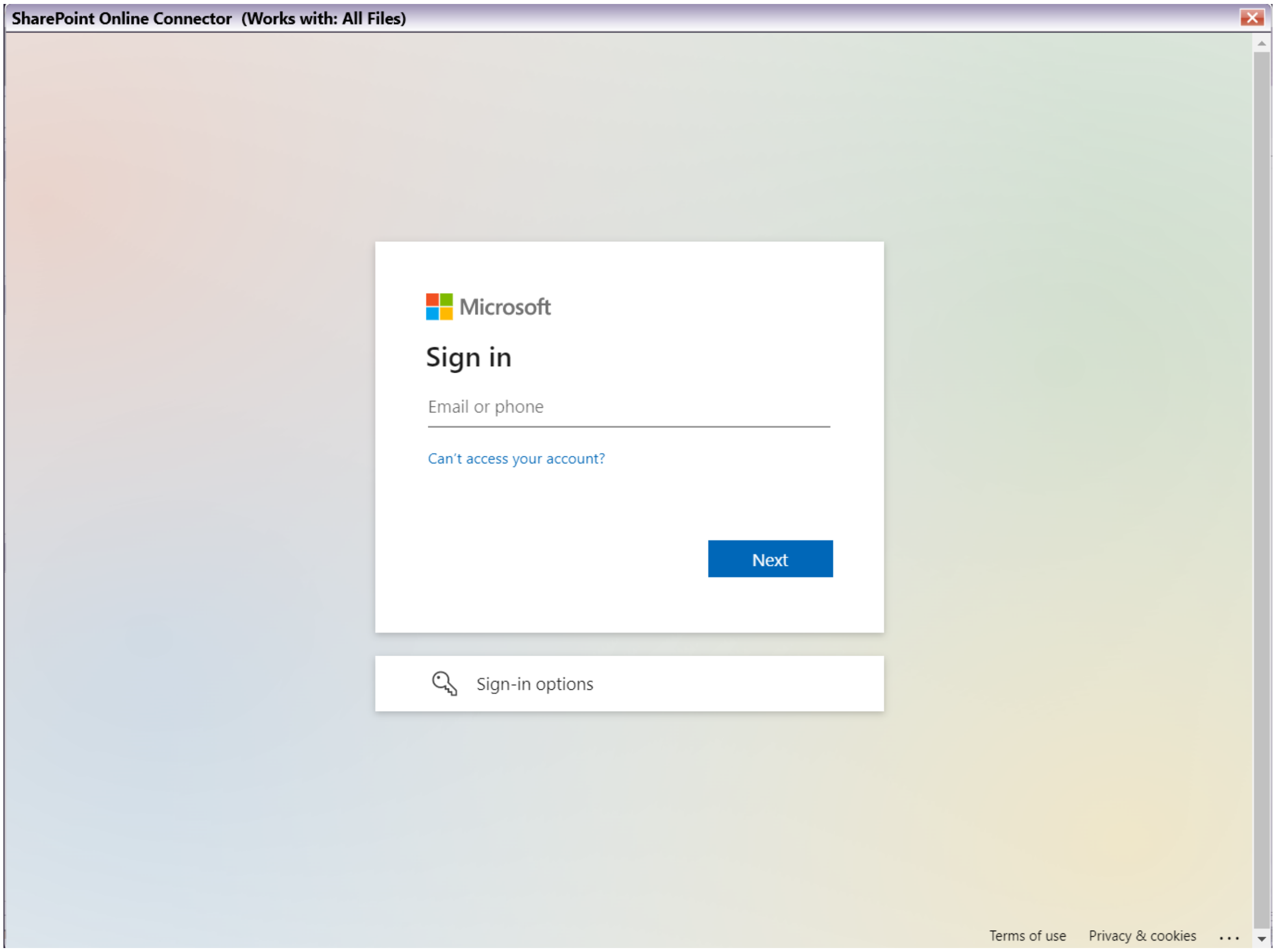
- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Authorization

To use this node in a workflow, you must connect it to a SharePoint Online account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a SharePoint Online account, do the following:

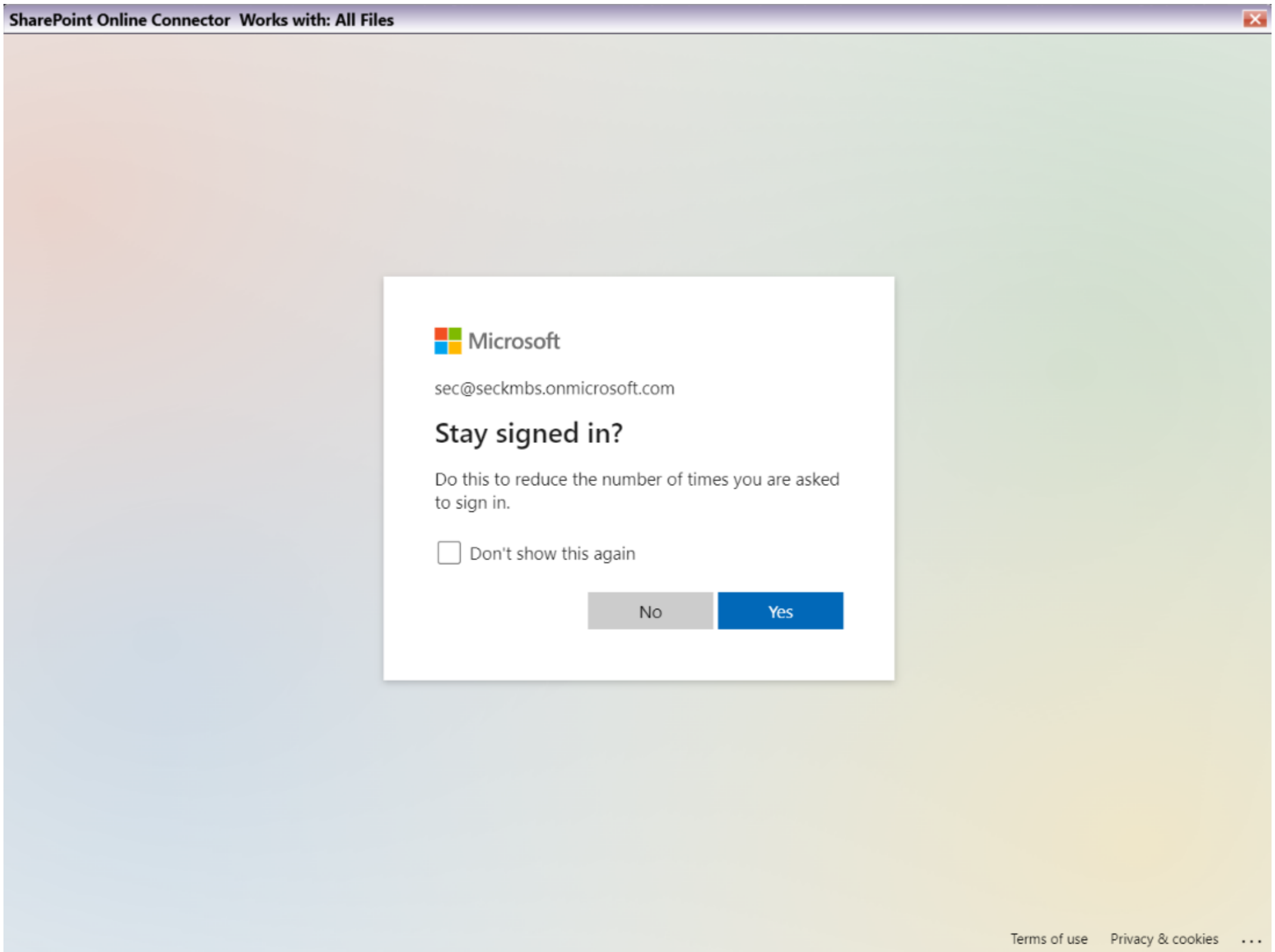
To connect to SharePoint Online, do the following:

1. 1. Select **Add Account**. The Microsoft login window appears:

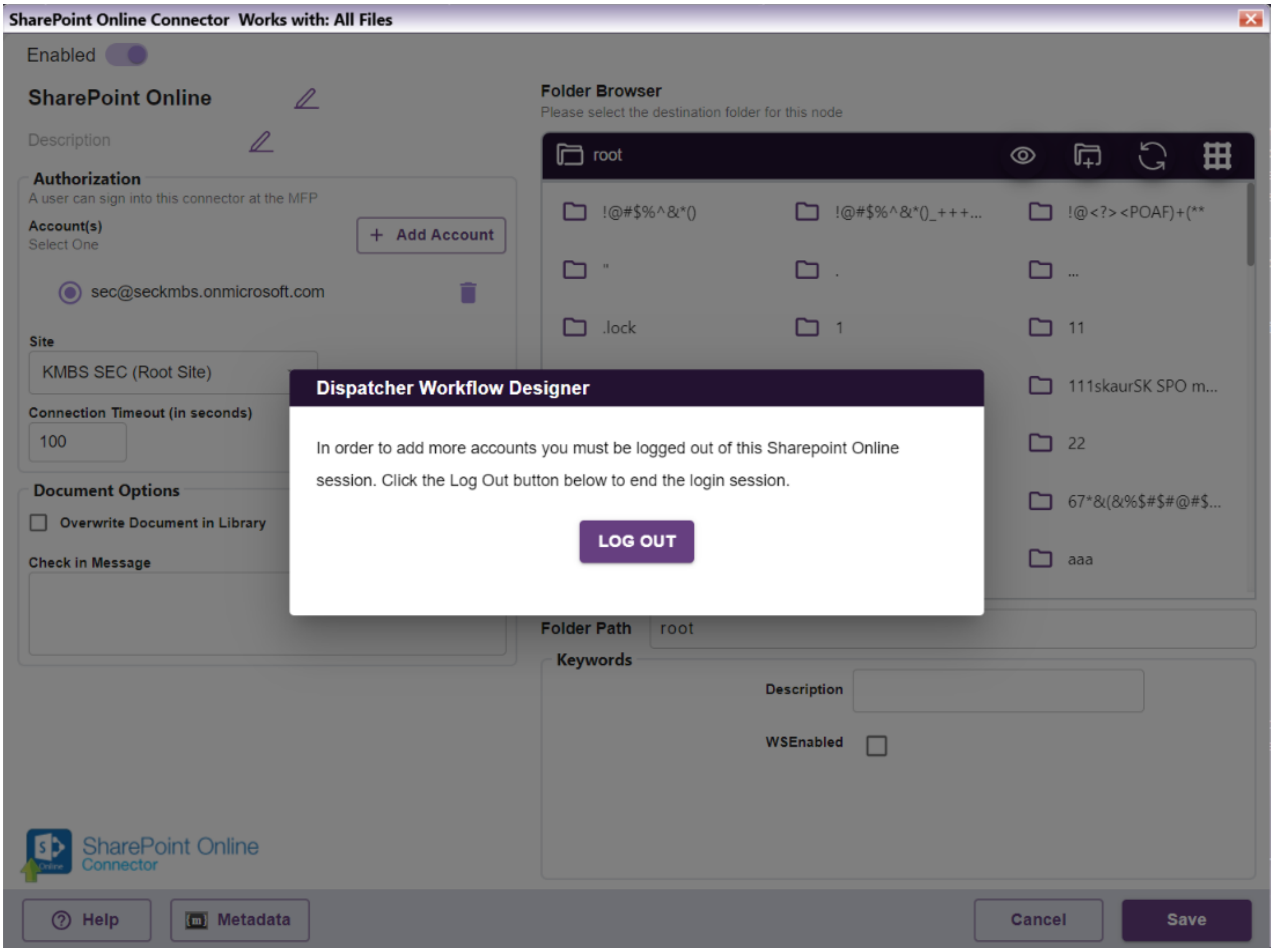


2. Enter the login information for the Microsoft SharePoint account, and then select **Sign In**.

3. In the window that appears, specify if you want to stay signed in. Select either **Yes** or **No**.



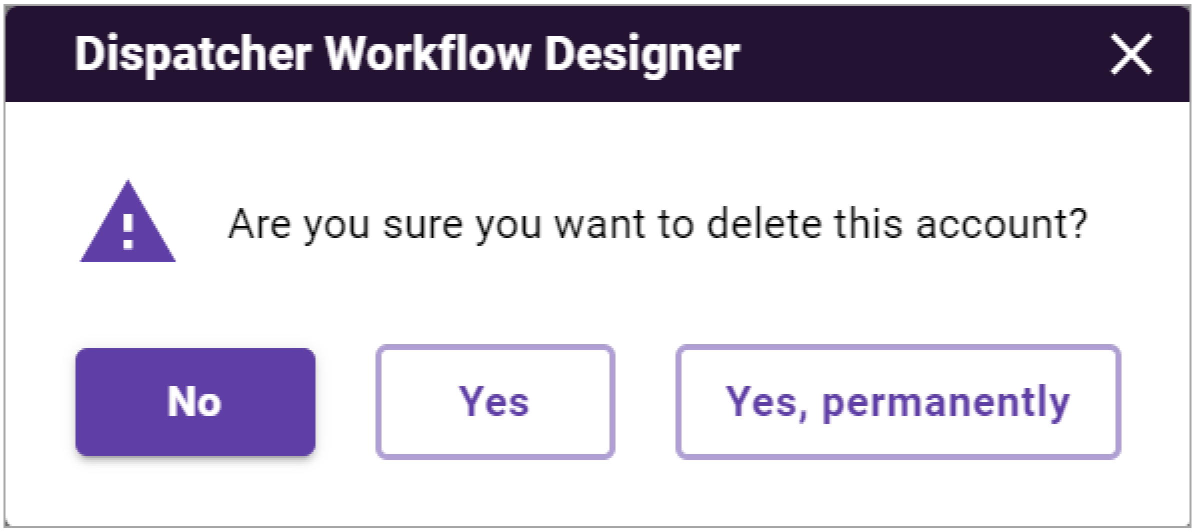
Note: You can add only one OneDrive account per session. To add another OneDrive account, you must save the node and reopen it:



4. If multiple accounts are available, select the radio button next to the desired account.
5. To modify the default the number of seconds the system is allowed to attempt to connect with the specified account, enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, select the **Delete** icon next to the account you want to delete. A window with the following options appears:



- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

Document Options

In the Document Options area, you can update certain aspects of documents that pass through the node.

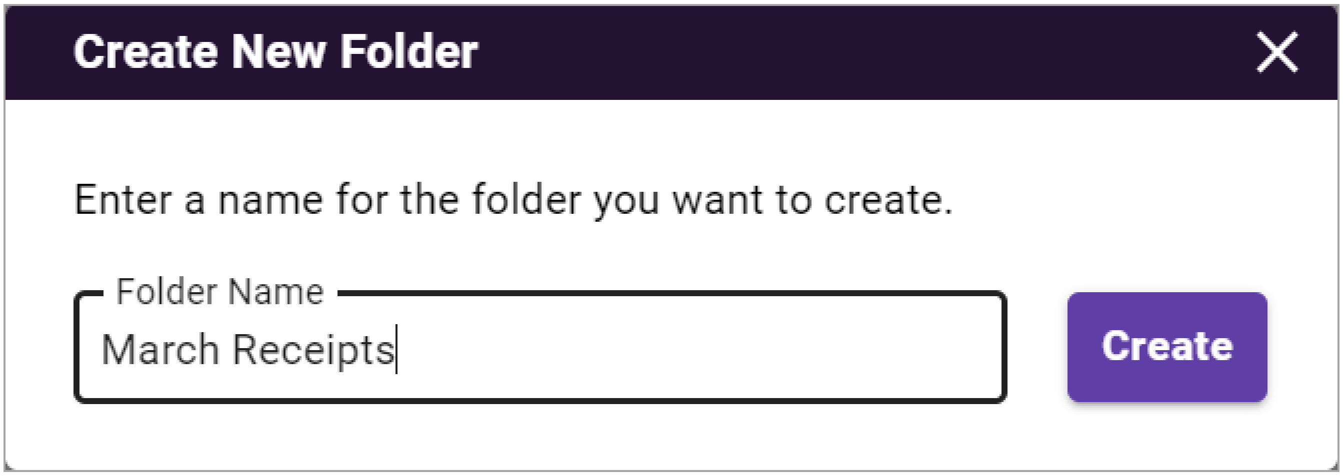
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to SharePoint Online with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both versions.
- **Check in Message** - Text entered into this field is added to SharePoint Online as a comment along with the uploaded document. Check In messages are used to track edits and versioning within SharePoint Online.

Customizing the SharePoint Online Connector Node

Once connected to a SharePoint Online account, the Folder Browser area populates with a tree-view of your SharePoint Online folders, sub-folders, and files. Browse through your SharePoint Online folder structure and choose a folder in which to store your documents. The Folder Path field automatically updates with the selected folder path.

Sending Documents to a New Folder

To create a new folder in SharePoint Online, select **New Folder** from the Folder Browser toolbar. The Create New Folder window appears:



Enter the name for the new folder in the **Folder Name** field, and then select **Create**. The folder appears in the Folder Browser. Note that this field is compatible with metadata.

Tip: You can also type in a folder path that includes one or more folders that do not currently exist within the SharePoint Online account. The SharePoint Online Connector node will automatically create any new folders and then upload the document(s) to that location.

Keywords

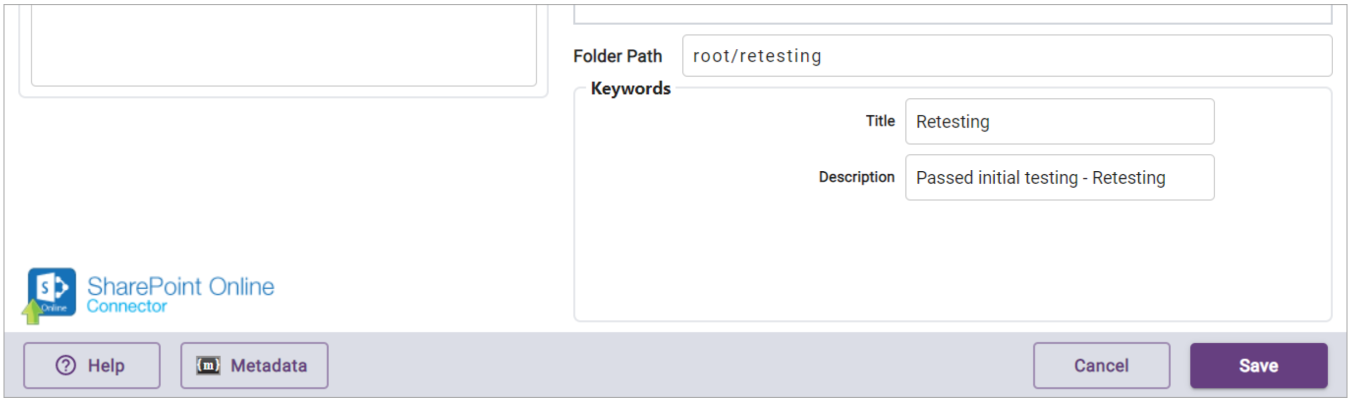
Below the SharePoint Online folder section is an area displaying Keywords, which are metadata tags used within SharePoint Online. Users can configure Keywords in the following ways:

- During workflow setup
- 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:



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 drop-down menu	No
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 drop-down 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

    - Modified By

- The Currency keyword does not support minimum/maximum constraints.

File and Folder Name Restrictions

The following restrictions apply to file and/or folder names:

- File names cannot start with a space or end with a space
- Folder names cannot end with a period (.)
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use any of the following characters: `~ " # % & * : < > ? / \ { | }`

Notes:

- Folder names cannot only be a tilde (~). However, a tilde can be used in a folder name along with other characters.
- The metadata key `{workflow:modified}` cannot be used in the folder path, because the resolved value contains a colon (:).

View Options

The toolbar in the Folder Browser area provides the following view options for your SharePoint Online folders:

Icon	Name	Description
	Show/Hide Files	Click this button to show or hide files stored in SharePoint Online folders. When you have selected to **Hide Files**, you will only see folders. **Note:** Files do not display in the Tree view even if this option is selected.
	Refresh	Click this button to refresh the current view with the most up-to-date folders/files.
	Change View	Click this button to change from list view to grid view and back.

Accessing SharePoint Online at the MFP

At the MFP, take the following steps:

1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Options available are dependent upon the options selected in the **MFP Capture** node. If a **Form Selector** node has been configured, continue to step 3. Otherwise, skip to step 6.
3. **Enter your login credentials** - If a SharePoint Online account has not already been selected during node setup, you will need to tap the **Add Account** button to add your SharePoint Online account before entering your login credentials.
4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload. The **Folder Path** field displays the current folder path of the destination folder.
5. After selecting a folder, the available Keywords for that folder will appear. You may enter any necessary Keyword information.
6. **Select the “Scan” button** - This will send the scanned document to the selected SharePoint Online account and folder.

Outputs

Output Formats

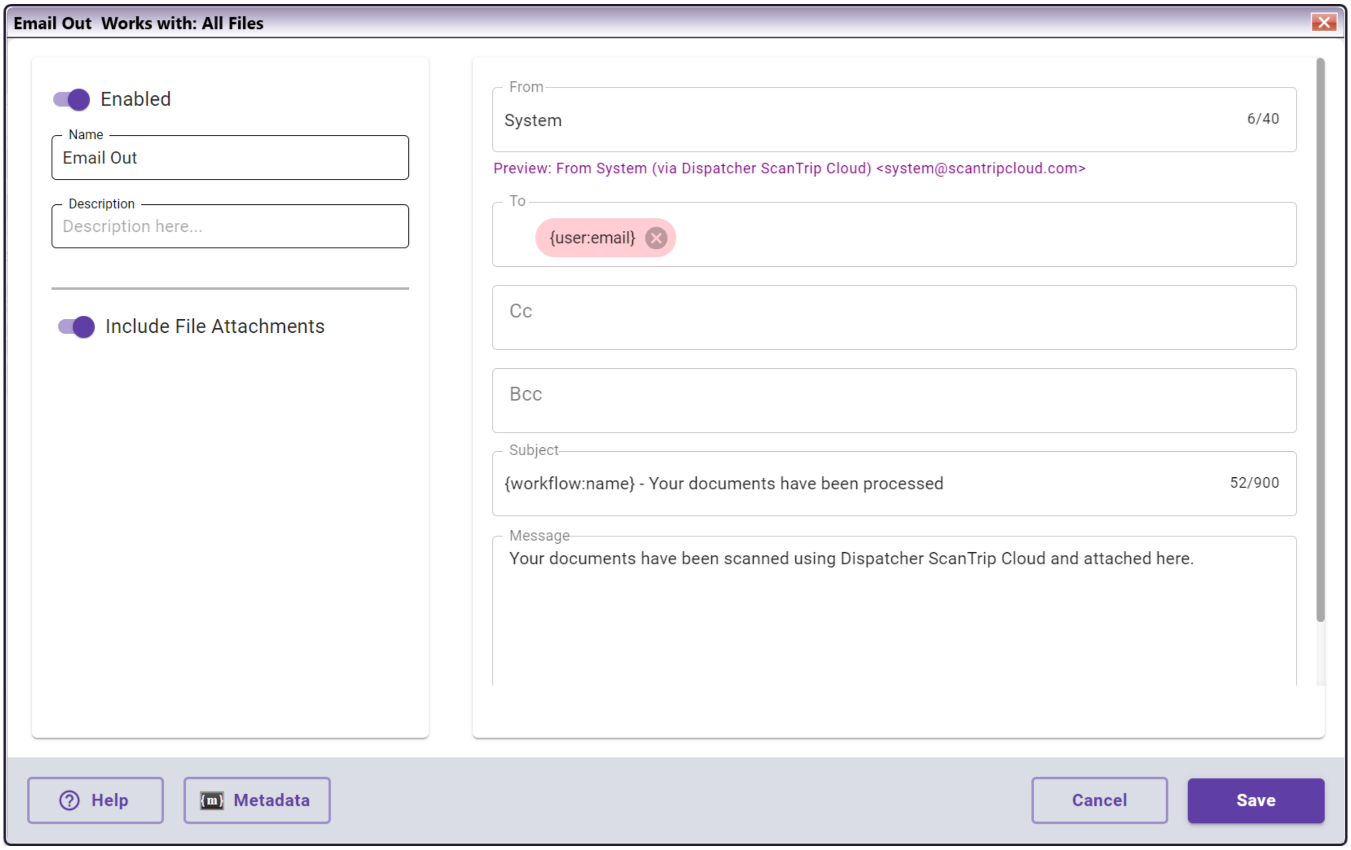
Output nodes distribute files in formats compatible with various databases or email services. These output nodes require a connection to the output to properly distribute files. Outputs include:

- **Email Out**

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.

Email Out

Use this node to distribute documents in an email format, directly to intended recipients. The output node allows you to send documents via email in an automated workflow.



Configuring the Email Out Node

To open the node's configuration window (shown above), add a distribution node for Email Out Node to your workflow and double-click on it. You have the following options:

- **Enabled** - To enable this node in the current workflow, select the toggle until "Enabled" displays. The default setting is "Enabled". If you disable the node:
  - The workflow will ignore the node.
  - The node will not check for logic or error conditions.

  Important! If you disable this node, and no other distribution nodes are enabled, it will not cause the workflow to fail validation, but no processed documents will output and they may be lost.

- **Name** - The name in this field appears below the node's icon in the workflow. The node's name defaults, but you can edit it. For example, you can specify a name that indicates the node's function in the workflow.
- **Description** - Enter a description for this node that details its purpose in the workflow, and/or to distinguish it from other nodes in the workflow. If the description is long, you can hover your

pointer over the field to display its entire contents.

This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

- **Include File Attachments** - To include file attachments in the email, select the toggle until it moves to the right. The default setting is “Enabled”.

  Note: The maximum total file size for emails and attachments combined is 10 MB.

Buttons

- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.

  Important! When using **metadata in a Distribution node**, you must update the metadata format.

- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Node Workspace

Use this area to specify your preferences for the outgoing email. You have the following options:

- **From** - By default, the Email Out node sends emails from `System <noreply@dispatcherstratus.com>`. You can update the “friendly name” portion (`System`) by typing in the field provided. For example, you can type “Rachel” in the field, and emails from the node will appear in the inbox as `Rachel <noreply@dispatcherstratus.com>`.
- **To** - Enter the recipient’s email address. Separate multiple addresses with a comma, semicolon, or new line.
  - **Cc** - Click in this field to enter an email address to be “carbon copied” on the email.
  - **Bcc** - Click in this field to 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.

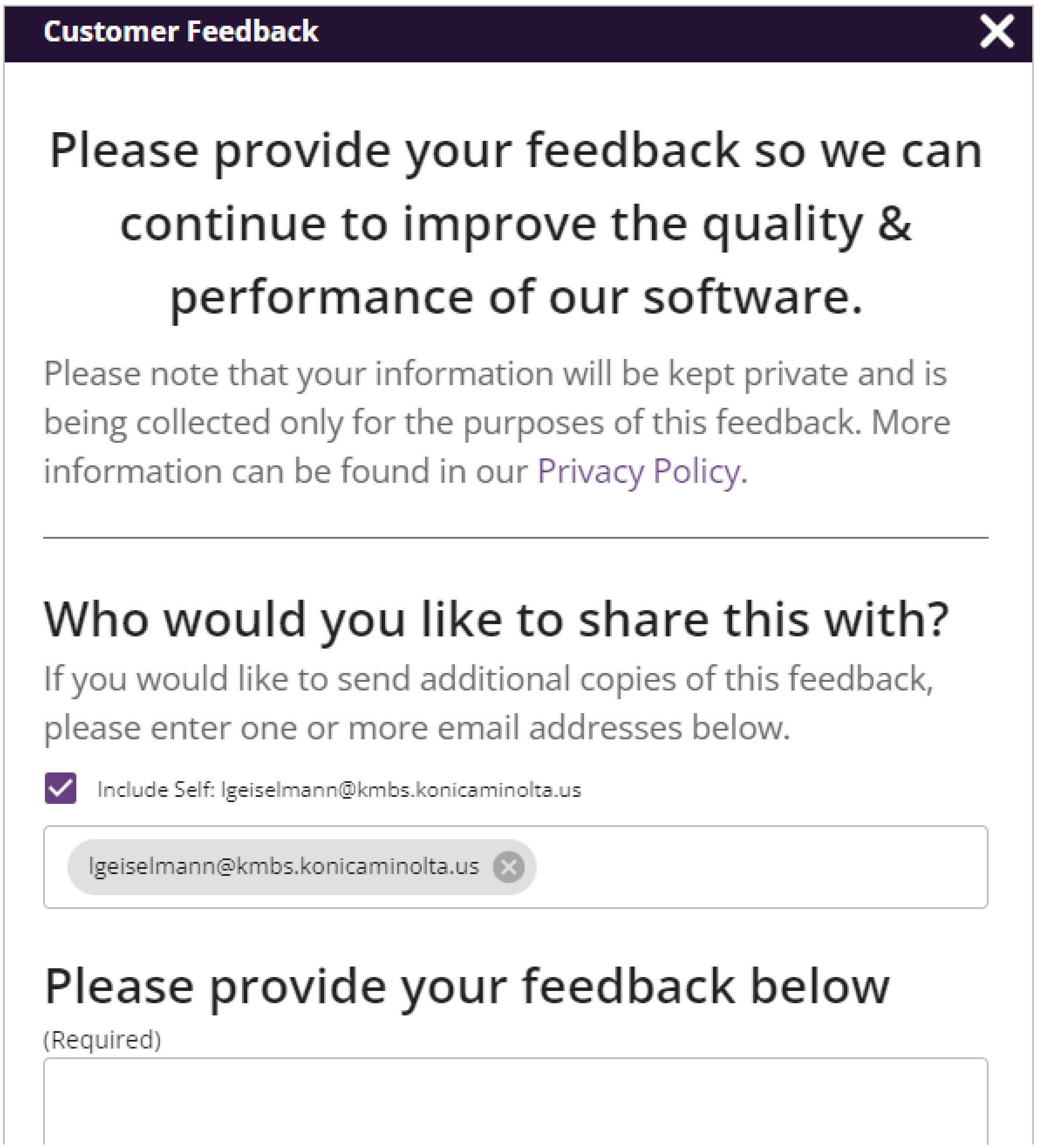
Reference

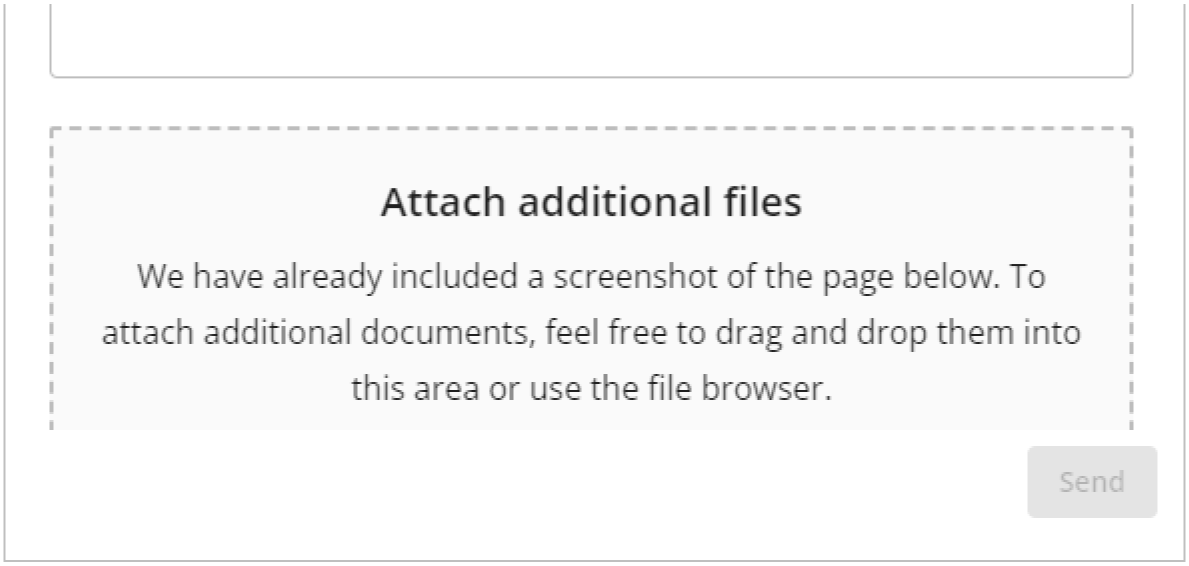
Customer Feedback

Customer Feedback

To send feedback about Dispatcher ScanTrip Cloud , either click **Send Feedback** from the menu in the upper right-hand corner or click the three dots on the right-hand side of a workflow and then click **Attach to Feedback**.

The Customer Feedback window resembles the following illustration:





On this window, do the following:

1. Enter any email addresses you would like to receive a copy of your feedback.

   Note: By default, the **Include Self** box is checked, which automatically populates the user's email address.

2. Enter your feedback in the designated area. For errors, it is helpful to include:

   - The browser you experienced the error on
   - What you were doing at the time you experienced the error, including reproduction steps, if possible

3. If you need to attach additional files, they can be dragged into the **Attach additional files** area.

   Note: Dispatcher ScanTrip Cloud automatically takes a screenshot of the page you were on when you opened the **Customer Feedback** window and attaches it to your feedback.

4. When you are done, click the **Send** button.

5. Any attachments you have added will appear as a .zip file attached to the email.

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Frequently Asked Questions

1. Can Dispatcher ScanTrip Cloud create folders dynamically?

2. Are there limits to the size of one workflow?

3. What on-premise infrastructure do I need to use Dispatcher ScanTrip Cloud?

4. How does Dispatcher Stratus differ from Dispatcher ScanTrip Cloud?

5. Are NFRs available for Dispatcher Stratus?

6. What distinguishes Dispatcher Stratus from its competitors?

7. What AWS availability zones will be available?

8. Can licenses be transferred between devices or users?

9. Does Dispatcher Stratus charge via page pack, and how is it priced?

1. Can Dispatcher ScanTrip Cloud create folders dynamically?

Yes. Using Dispatcher ScanTrip Cloud , new folders can be created dynamically based on the path provided in the workflow and a variety of variables, such as file name, logged-in user name, etc.

Dispatcher ScanTrip Cloud 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 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 a folder within the OneDrive Connector:

```
root/{ocr:zone.client[1]}
```

In this example, if the value of the ‘client’ zone is John Doe, then a John Doe folder will be automatically created within OneDrive.

2. Are there limits to the number of nodes that can be included in one workflow?

No. There are no limits to the number 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. If you need to create a complex process with a large number 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.

3. What on-premise infrastructure do I need in order to use Dispatcher ScanTrip Cloud?

None! As a true cloud-based solution, Dispatcher ScanTrip Cloud is hosted in the cloud and requires no on-premise installation.

4. How does Dispatcher Stratus differ from Dispatcher ScanTrip Cloud?

Both Dispatcher Stratus and Dispatcher ScanTrip Cloud are completely cloud-based solutions, built from the ground up to provide businesses with powerful document workflow automation. Both products include:

- Access to the Dispatcher Stratus/Dispatcher ScanTrip Cloud portal
- The same base application featuring the **Workflow Designer**, **Collection Nodes**, **Processing Nodes**, and **Distribution Nodes**.
- Document indexing and folder browsing features at the MFP

Dispatcher Stratus

The base license includes the following benefits:

- People nodes to add unprecedented collaboration and optics to your workflows
- Granular roles and permissions
- A proprietary job system for task optimization
- Support for non-mfp inputs
- Portal customization
- Advanced document processing

Dispatcher ScanTrip Cloud

Dispatcher ScanTrip Cloud is an economic, streamlined version of Dispatcher Stratus, focusing on scan process automation.

5. Are NFRs available for Dispatcher Stratus?

Yes! Dispatcher Stratus NFR licenses include all functionality, including 5 device licenses and 5 user licenses.

6. What distinguishes Dispatcher Stratus from its competitors?

Dispatcher Stratus is the only solution in the industry that does not charge for page packs. It is scalable in AWS, although increased usage may lead to higher support costs. Dispatcher Stratus also emphasizes AI capabilities, including machine learning for algorithm enhancement and AI optimization for optical character recognition (OCR). It offers micro-workflows. Furthermore, Dispatcher Stratus emphasizes user licenses over account sharing and is positioned to augment rather than replace ECM systems.

7. What AWS availability zones will be available?

Dispatcher Stratus is available with the following data locations available: Arlington, VA (USA); Canada (BCA); Frankfurt, Germany (Europe); Tokyo, Japan (Asia).

8. Can licenses be transferred between devices or users?

Yes, licenses can be transferred between devices or users, but sharing accounts is prohibited.

9. Does Dispatcher Stratus charge via page pack, and how is it priced?

Dispatcher Stratus is the only solution in the industry that does not charge for page packs.

Glossary

General

Term	Definition
Canvas Properties	The settings and customization options for the background or “canvas” of the workflow.
Collection Node	The starting node that collects files for further processing/distribution of a Dispatcher ScanTrip Cloud workflow.
Connector (Node)	A type of distribution or output node that allows Dispatcher ScanTrip Cloud to route files to third-party applications.
Connector (Workflow Designer)	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.
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.
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.
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.
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.
Process Node	Any document processing or manipulation task between the Collection Node(s) and the Distribution Node(s) in a Dispatcher ScanTrip Cloud workflow.
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.

Term	Definition
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.

Portal

Term	Definition
IWS App	Dispatcher ScanTrip Cloud connects to MFPs by using the IWS app, which is installed directly on the MFP. The IWS app can be downloaded at the MFP or through MarketPlace.
License	A license corresponds to a device that Dispatcher ScanTrip Cloud is linked to.
MarketPlace	Konica Minolta's MarketPlace is an online store where licenses for many apps and programs can be purchased, including Dispatcher ScanTrip Cloud .
Profile	A repository for information about a user.
Tenant/Tenancy	A group of licenses that make up a single user group.
Tenant Admin	A user with additional permissions to access workflow creation, analytics, user invitation, and more.
Tenant Manager	A user without access to workflows, but who manages one or more tenants.
User	An individual who can use workflows created by a Tenant Admin. All users must have a MarketPlace email address.

List of Supported Devices/MFPs

Note: For an up-to-date list of MFP models that are certified to support Dispatcher ScanTrip Cloud , please visit the **bEST website**.

Supported MFPs

Models

- bizhub C3350i, C4050i
- bizhub 4050i, 4700i, 4750i
- bizhub C250i, C300i, C360i
- bizhub 300i, 360i
- bizhub 450i, 550i, 650i
- bizhub C450i, C550i, C650i
- bizhub 750i
- bizhub C750i
- bizhub C3351, C3851, C3851FS
- bizhub 4052, 4752
- bizhub C227, C287
- bizhub 227, 287, 367
- bizhub C258, C308, C368
- bizhub 308, 368, 458, 558
- bizhub 308e, 368e, 458e, 558e, 658e
- bizhub C458, C558, C658
- bizhub C659, C759
- bizhub 758, 808, 958, 958PRO
- bizhub 950i, 850i C4051i, C3351i, 4751i, 4051i

Notes:

- MFPs must either have browser capabilities and/or IWS capabilities (preferred).
- For best performance with Dispatcher ScanTrip Cloud , MFPs should have the [**Dispatcher ScanTrip Cloud App**](../../getstart/sec.iws/ installed.

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Credentials. Account ID, passwords, password hints and similar security information used for authentication and account access.

Demographic Data. Data about you such as your country of residence and preferred language.

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- Social networks when you grant permission to a Konica Minolta product to access your data on one or more networks;
- Designated entities within your business or enterprise (such as a member of your IT department) in the course of providing services to you;
- Partners with whom we offer branded services or engage in joint marketing activities. If you purchase Konica Minolta services or products from a Konica Minolta partner we may receive certain information about your purchases from that partner;
- Fraud prevention agencies or credit reporting agencies in connection with credit determinations; and
- Publicly available sources such as open government databases or other data in the public domain.

How We Use Personal Data

We collect and process personal data with your consent, as required by law, or as necessary to fulfill the legitimate interests of Konica Minolta, including to: (i) provide you with products and services; (ii) manage, administer and operate our business; (iii) meet our contractual and legal obligations; (iv) carry out direct marketing; (v) prevent fraud; and (vi) protect the security of our systems and our customers.

Personal data that is submitted in a business capacity may be merged with available business database directories. Konica Minolta uses personal data to:

- authenticate your identity;
- manage your accounts, including products and licenses;
- respond to your questions and communicate with you;
- provide customer support;

- provide firmware and software updates, share patches and bug fixes, and announce important security issues;
- share news, updates, or helpful tips about Konica Minolta products and services;
- enable online shopping;
- inform you of special promotions and other advertising;
- allow you to sign up for online services;
- create reseller partnerships;
- receive and evaluate job applications;
- customize, analyze, and improve our products, services, technologies, communications and relationships with you;
- deliver products and services requested by you;
- notify you about administrative matters that pertain to your Konica Minolta products or services; and
- in the event of a merger or acquisition of Konica Minolta, or a substantial portion of its assets, disclose or transfer personal data to the surviving or acquiring party, respectively.

How We Share Personal Data

We share your personal data as necessary to complete a transaction or provide a product or service you have requested or authorized. For example, when you provide payment data to make a purchase, we will share your payment data with banks and other entities that process payment transactions or provide other financial services, and for fraud prevention and credit risk reduction.

We share personal data among Konica Minolta affiliates and subsidiaries to efficiently manage the operation of our business. We also share personal data with vendors or agents working on our behalf for the purposes described in this statement or in our contracts with you. For example, companies we’ve hired to provide customer service support or assist in maintaining and servicing products via our systems and services may need access to personal data to carry out those functions. In such cases, these companies are required by contract to abide by our data privacy policy and security requirements and are not allowed to use personal data they receive from us for any other purpose. We may also disclose personal data as part of a corporate transaction such as a merger or sale of assets.

Finally, we will transfer or disclose personal data when we have a good faith belief that doing so is necessary to:

- Comply with applicable law or respond to valid legal process, including from law enforcement or other government agencies;
- Protect our customers, for example to prevent attempts to defraud users of our products, or to help prevent the loss of life or serious injury of anyone; or

- Operate and maintain the security of our products, including preventing or stopping an attack on our computer systems or networks.

Where We Process and Store Personal Data

Personal data collected by Konica Minolta may be transferred to, stored and processed in your region, the United States, or any other country in which Konica Minolta or its subsidiaries, affiliates, subcontractors, agents or partners maintain facilities. Our subsidiaries, affiliates, subcontractors, agents and partners are required by contract to safeguard any personal data they receive from us and are prohibited from using the personal data for any purpose other than to perform the services required by Konica Minolta. We also take steps to provide adequate protection for any transfers of your personal data in accordance with applicable law.

Our privacy guidelines are communicated to Konica Minolta employees on an annual basis as part of our mandatory training program. We take steps to ensure that the data we collect under this privacy statement is processed according to the provisions of this statement and the requirements of applicable law wherever the data is located. Sometimes we transfer personal data from the European Economic Area and Switzerland to other countries. When we do, we use a variety of legal mechanisms, including contracts, to help ensure any required rights and protections apply to your data.

Period of Storage

Konica Minolta retains personal data for as long as necessary to provide the products and fulfill the services and transactions you have requested or for other essential purposes such as complying with our legal obligations, resolving disputes and enforcing our agreements. Actual retention periods may vary. The criteria used to determine the retention periods include: (i) how long personal data is needed to provide our products or operate our business; (ii) whether the personal data is of a sensitive type; and (iii) whether Konica Minolta is subject to a legal, contractual or similar obligation to retain the data.

Your Rights Regarding Personal Data

You have choices about the data we collect. When you are asked to provide personal data, you may decline. However, if you choose not to provide data that is necessary to provide a product or feature, you may not be able to use that product or feature.

- If the processing of personal data is based on your consent, you have a right to withdraw consent at any time for future processing;
- Where applicable, you have a right to request from us, (i) access to and receipt of personal data, (ii) transfer of personal data, and (iii) rectification or deletion of your personal data;
- You may also object to or restrict the processing of your personal data;
- You have the right to object to direct marketing; and
- You have the right to file a complaint with a regulator or data protection authority.

You may contact Konica Minolta to check the accuracy of your personal data or to request that your information be updated or deleted by writing to privacy@kmbs.konicaminolta.us. Please indicate “Access” in the subject line and let us know the details of your request in the body of the message. You may also contact us at 1-866-604-1225. Konica Minolta reserves the right to confirm your identity and to modify the scope and number of requests. In certain cases, your request may be denied on the basis of a legitimate exception or where we are legally prevented from honoring such request.

Children

Konica Minolta does not direct any part of its website to children under 13 years old (or such age as a child is defined by local law if higher) and does not knowingly collect personal data from children or target its website or products to children.

Security of Personal Data

Konica Minolta is committed to protecting the security of your personal data and maintains strict access control over it. We use reasonable and appropriate physical, technical and administrative procedures to safeguard personal information we collect and process. Only authorized Konica Minolta personnel, and those of our subsidiaries, affiliates, agents, and partners are allowed to handle information submitted to Konica Minolta.

Konica Minolta websites store personal data in password-protected environments on servers that are subject to Konica Minolta’s information security policies, standards, and procedures. We use a variety of security technologies and procedures to help protect your personal data from unauthorized access, use or disclosure. For example, we store the personal data you provide on computer systems that have limited access and are in controlled facilities.

Our Agents and Partners Protect Personal Data

When you provide personal data to Konica Minolta, it may be necessary to transfer personal data to our subsidiaries, affiliates, agents or partners, who then fulfill the orders or provide the services. Konica Minolta requires that its subsidiaries, affiliates, agents and partners handle personal data with the same degree of concern for personal data privacy as Konica Minolta.

Cookies, Web Beacons and Privacy Choices

What is a Cookie?

Cookies are small text files that are placed on your computer or mobile device by websites that you visit. They are widely used in order to make websites work efficiently, as well as to provide information to the owners of the site. Cookies are useful because they allow a website to recognize your device, letting you navigate between pages efficiently, remembering your preferences, and generally improving your experience.

How Does Konica Minolta Use Cookies?

Konica Minolta uses cookies to recognize repeat visits to our websites and to facilitate Web navigation and online shopping. The cookies store your country and language, along with an assigned random session ID. In some cases, the cookies store name and address information so you do not have to re-enter this information in multiple forms.

The cookie information that Konica Minolta collects helps us track the number of visitors to our websites over time and determine whether these were new or repeat visits.

Konica Minolta uses Google Analytics to collect and process data. For more information on how Google Analytics collects and processes data, visit www.google.com/policies/privacy/partners/. Konica Minolta also works with third party advertising partners that use cookies to deliver Konica Minolta advertising on other websites and to measure the performance of our advertising campaigns.

What is a Web Beacon?

A web beacon is an electronic image that can be used to recognize a cookie on your computer or other device when you view a web page or e-mail.

How Does Konica Minolta Use Web Beacons?

Konica Minolta and our third party advertising partners may use web beacons on our websites, in our emails, and in our advertisements on other websites to measure the effectiveness of our websites and our advertising. For example, web beacons may count the number of individuals who visit our websites from a particular advertisement or the number of individuals who open or act upon an email message.

Can I Block Cookies and Web Beacons?

Yes, the ability to enable, disable or delete cookies can be controlled through your website browser. Consult the “Help” menu of your browser application for details. If you block the use of cookies, you will not be able to use some of the features on Konica Minolta websites, including the shopping cart and online account management services. You can make some web beacons unusable by disabling the cookies.

Links to Non-Konica Minolta Websites.

Other websites that may be accessed through our website, such as through social media buttons or other links, may collect certain information about you through the use of cookies, web beacons and other features. We do not have access to or control over the cookies or other features that these third party sites may use, and the information practices of these third party websites are not covered by this privacy statement. Please review the privacy notices and settings of the third party site to understand their practices.

Privacy Choices: How Does Konica Minolta Use Interest-Based Advertising?

Websites cooperate with online advertisers to collect information about visitors to present ads that are more useful and relevant. This is known as interest-based advertising or online behavioral advertising. Konica Minolta and our third party advertising partners may use cookies and web beacons to deliver interest-based ads that are relevant and targeted to our customers and prospects.

What Information Do Konica Minolta Websites Collect for Interest-Based Advertising?

Konica Minolta and our third party advertising partners may use cookies or web beacons to collect information for the purposes of interest-based advertising based on your visits to konicaminolta.com and other web sites. These cookies identify the pages you view, the links and ads you click on, other actions you take on those websites, and the referring website. Similarly, online advertisers use cookies to deliver advertising to you for companies other than Konica Minolta based on your visits to konicaminolta.com and other websites.

Communication Preferences

Konica Minolta may send commercial email to you advertising our products and services. You can also subscribe to various product and service-specific communications on our websites. If you receive commercial email from Konica Minolta and wish to discontinue these mailings, you may unsubscribe through an “unsubscribe” link provided in the communication.

This unsubscribe option does not apply to communications primarily for the purpose of administering order completion, contracts, support, product safety warnings, software updates, services updates (outages or service disruptions), or other administrative and transactional notices, the primary purpose of which is not promotional in nature.

Contact Konica Minolta

Konica Minolta commits to resolving complaints about your privacy and our collection or use of your personal data. Inquiries or concerns regarding this privacy statement and your rights under privacy laws can be directed to the Konica Minolta Director of Compliance at **privacy@kmbs.konicaminolta.us** or you can write to the Director of Compliance at the following location.

Konica Minolta Business Solutions U.S.A., Inc.
Director of Compliance
100 Williams Drive
Ramsey, NJ 07446

For other Konica Minolta Global locations please visit our **Konica Minolta Global Website** and choose your region.

If you have questions about Konica Minolta products or services, call us toll-free at **800-456-5664**. More contact information about support, sales, corporate information, research and innovation, and services is available on our **Support Page** should you have additional questions.

Disclosure

Connectivity to Google in Dispatcher Solutions

Konica Minolta's Dispatcher solutions, including Dispatcher Phoenix and Dispatcher ScanTrip Cloud, offer integrations with Google. These integrations use and transfer to any other app of information received from Google APIs will adhere to **Google API Services User Data Policy**, including the Limited Use requirements.

Transparency in Coverage

This **link** leads to the machine readable files that are made available in response to the federal Transparency in Coverage Rule and includes negotiated service rates and out-of-network allowed amounts between health plans and healthcare providers. These files are formatted to allow researchers, regulators, and application developers to more easily access and analyze data.

Statement Updates

Konica Minolta reserves the right to make changes to this statement Policy. If we make changes, we will revise this privacy statement Privacy Policy to reflect such changes and revise the effective date of the statement Policy. Your continued use of our websites and/or applications following the posting of changes constitutes your acceptance of such changes.

Statement Effective Date: March 9, 2023.

Reference Information

Regular Expressions

Regular Expressions (RegEx) are specially written strings that are used to search text. Regular Expressions have a formal syntax that defines 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 ScanTrip Cloud . Please note that this is not a complete list of all operators.

Match Modifiers - These characters will affect how the search is performed.

Operator	Description
*****	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 uppercase 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:

Operator	Description
\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: **Regular Expressions Wiki**

For a tutorial to learn more about how to use regular expressions, please visit: **Regular Expressions Tutorial**

The syntax supported by **Dispatcher ScanTrip Cloud** is defined on the **Metadata Browsing** page.

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:

Operator	Description
[	opening square bracket
*****	backslash
^	caret
$	dollar sign
.	period
**	**
?	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 ScanTrip Cloud** 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:

Line	Match Case	Do Not Match Case
1	**test**	My**Test**, **test**
2	la**test**, **test**	la**test**, **test**
4	**test**ing	**test**ing
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.

Specifying Page-Level Metadata

The following are examples of 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, the following would return the value of bar1:Address for page 5:

  ```
  {bar1:Address\[5\]}
  ```

- 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

The following are examples of specifying a metadata occurrence number.

- You can specify an occurrence number using another pair of square brackets following the page-level brackets. For example, the following would return the second occurrence of "value:bar" on page 3:

  ```
  {value:bar\[3\] \[2\]}
  ```

- In another example, the following would return the first document-level occurrence of "parser:Value":

  ```
  {parser:Value\[0\]\[1\]}
  ```

- To specify the first value found, use []. For example, the following would return the first barcode found in the "Address" zone, regardless of page:

  ```
  {bar1:zone.Address\[\]}
  ```

- To indicate that multiple values should be returned as a joined string, use | . For example, the following would return all values of bar1:zone.part number, separated by "-":

  ```
  {bar1:zone.part number\[\]|\\-}
  ```