Dispatcher Stratus

User Manual

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

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Table of Contents

Get Started

Getting Started

Konica Minolta’s Dispatcher Stratus is a fully cloud-based document processing solution that automates document workflows, optimizes business processes, reduces costs, and increases productivity for organizations large and small. Because Dispatcher Stratus resides in the cloud, your team can access its robust set of features from anywhere.

At the core is our graphical **Workflow Designer**, via which you can create automated workflows quickly and easily to meet all your document processing needs. To support your workflow management, Dispatcher Stratus provides comprehensive **tenant administration** features with flexible **user roles and permissions** to enable you to control access to your workflows and devices.

Content Covered in this Help Site

This help site describes all of the features and functionality of Dispatcher Stratus. However, all features may not be available to you in your tenant, depending on the following:

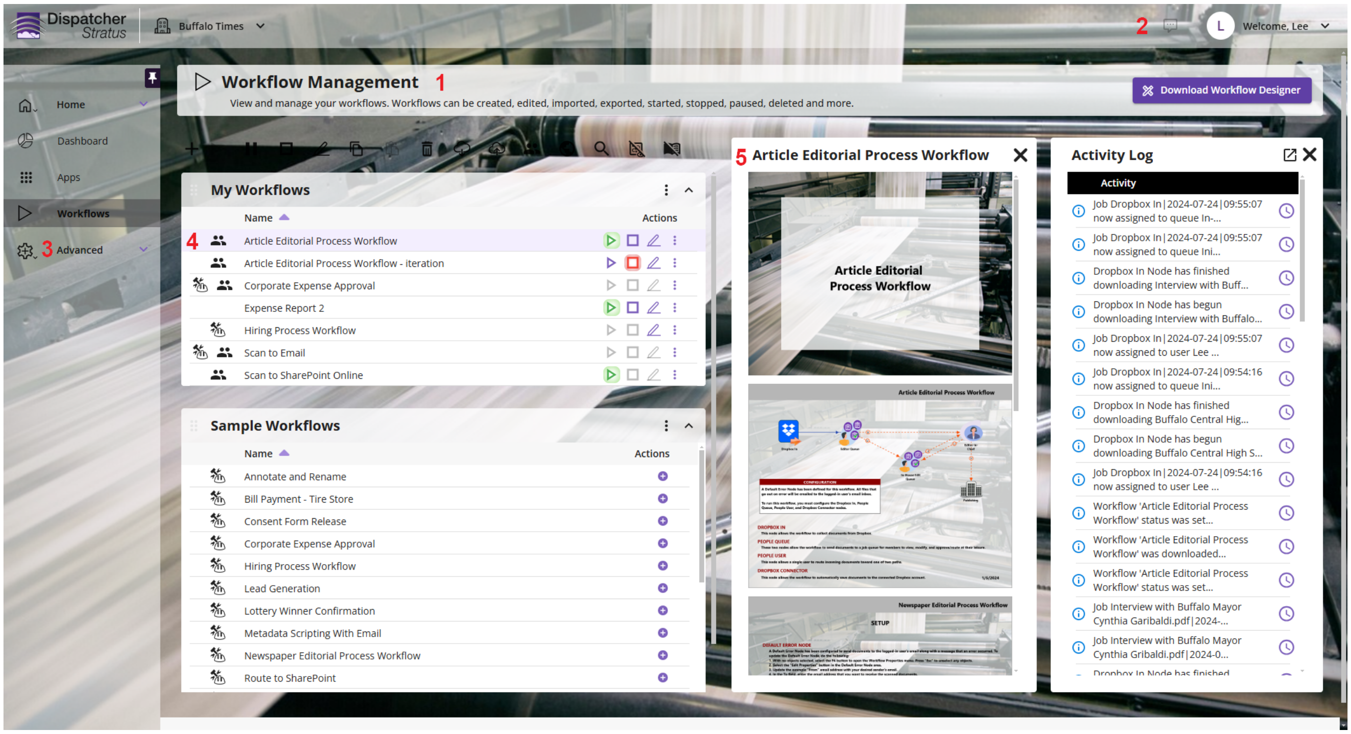
- **License tier** - Your tenant’s feature list is determined by the Dispatcher Stratus product that was purchased to create your tenant - Enterprise, Business, or Starter
- **User licenses** - To participate in a workflow containing **People nodes**, a user must be licenses within the tenant.
- **Device licenses** - To execute workflows on a device, the device must be licensed in your tenant.
- **Role assignments** - Access to pages and functions in a tenant is restricted to privileged users. That is, users must be granted permissions to access the various pages and functions within a tenant.

Content in this help file falls into the following basic categories:

- Tenant administration - Directed at tenant members with **tenant admin permissions**.
- Workflow management - Directed at tenant members with one or more **workflows permissions**.

A View of a Tenant

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



Note the following:

1. Tenant name is "Buffalo Times" .
2. Logged-in user is Lee.
3. The Navigation pane shows the Advanced menu in an expanded state, providing links to the pages in the tenant to which Mattius has access permissions, including **Device Management**, **User Management**, etc.
4. The "Article Editorial Process Workflow" workflow is selected in the My Workflows table.
5. The Workflow Preview panel shows a preview of the selected workflow.

Dispatcher Stratus Basics

The following sections provide quick overviews of some of the key features of the system, and introduce terminology you will need to know when using this help site.

Tenants

Access to Dispatcher Stratus is provided through a tenancy. After purchasing a Dispatcher Stratus package, your tenant administrator creates your tenant. The purchase includes a number of individual licenses. These licenses are required for certain functionality in the tenant:

- **Devices (MFPs) must be registered with a Device license** before users can run workflows on them.
- **Tenant members must be registered with a User license to use the People nodes**.

Next, your tenant administrator sets up the tenant, including:

- **Inviting people to join the tenant**.
- **Assigning user roles** to those who accept their invitation.
- **Adding devices** to the tenant.

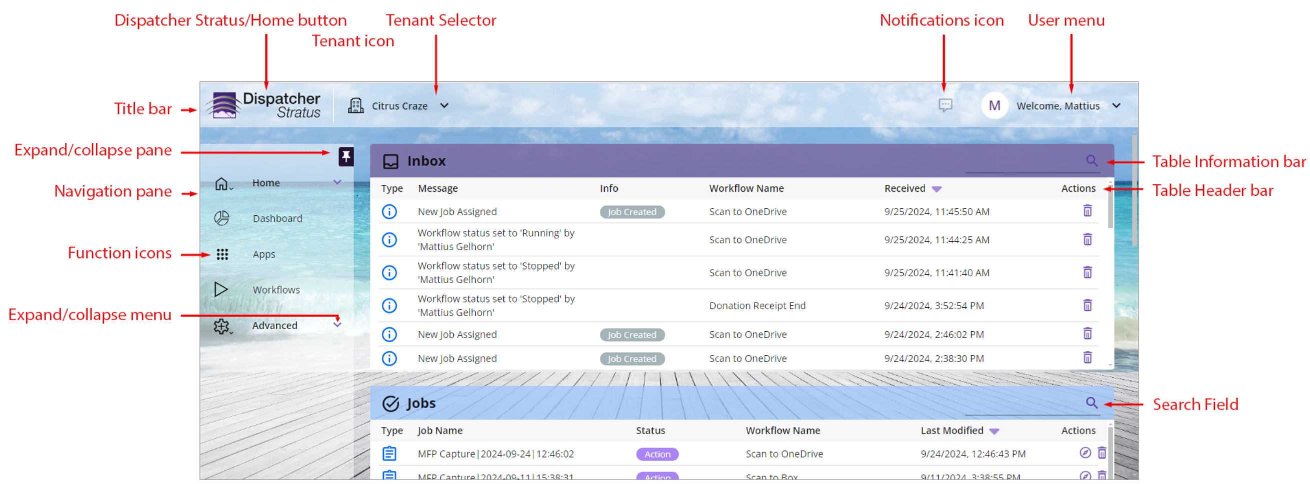
Workflows

Privileged tenant members can begin **creating workflows** (or **importing existing workflows**) immediately upon tenant creation. However, most workflows cannot be run until a minimum of tenant setup has been completed. For example, devices running a workflow must be licensed, and users must be granted workflow permissions to access and run workflows.

In addition, most nodes in a workflow require configuration. For example, the **Dropbox Connector** node must be authenticated to a valid Dropbox account. However, Dispatcher Stratus is designed for speed and ease of use. Most workflow configurations can be completed in a matter of minutes. A few nodes, such as the **Advanced OCR** node, require more detailed configuration.

Global Page Elements

The following illustration shows the Home page, with the callouts indicating many of the global page elements - elements that appear on all pages in the tenant:



Title Bar

The Title bar appears at the top of every page in the tenant. It includes the following:

- Dispatcher Stratus icon and logo - Select this to access the tenant's Home page.
- **Tenant Selector** - Displays the name of the tenant, and includes a dropdown menu providing access to any other tenants to which you have access.
- **Notifications icon** - Displays a list of high-alert tenant notifications to the logged-on user, indicating the user should take action.
- **User menu** - Displays the logged-on user's first name, and provides access to the User menu.

Navigation Pane

The Navigation pane provides links to the pages in the tenant to which you have access, depending on your **Licensing Tier** and user roles. The following is a full list of available pages:

- **Home** - The landing page for your tenant job activity, displaying the most recent additions to your inbox, as well as to your jobs, job queues, and tracked jobs.
  - **Inbox** - An overview of the jobs, error notifications, and workflow statuses for workflows you have access to.
  - **Jobs** - The primary method of task management within Dispatcher Stratus. Tasks assigned to you appear here.
  - **Job Queues** - A repository of unclaimed jobs that can be claimed and automatically assigned to you.
  - **Tracker** - A repository of jobs that allows you to continue to view jobs after they are no longer assigned to you.
- **Dashboard** - A reporting tool that displays you to see user, device, and workflow usage in the tenant.
- **Workflows** - Manage your workflows here. Access the Workflow Designer.
- **Apps** - Create, maintain, and run Stratus apps.
- Advanced - A menu that, when expanded, provides access to the advanced features to which you have access.
  - **Devices** - Manage your MFP and non-MFP inputs.
  - **Users** - Manage new and existing users.
  - **Forms** - Manage your Dispatcher Stratus forms here. Access the Form Builder.
  - **Logs** - View and filter the complete list of internal notifications generated by your tenant.
  - **Roles** - Create and modify user roles and permissions.

Tenant Selector

The Tenant Selector appears on the **Title bar**. It displays the name of the tenant, and provides access to the Tenant Selector menu. To view the Tenant Selector menu, and/or open a new tenant, do the following:

1. Select the tenant name or the arrow next to it.
2. Select a tenant name from the drop-down list. You exit from the current tenant and the selected tenant appears.

Notes:

- You can have only one tenant open at a time.
- If a tenant of which you are a member does not appear on the list, you can manually add it by entering the tenant URL in the field provided and selecting **+**.

Notifications Icon

The **Notifications icon** appears on the **Title bar**, providing access to a list of “high-alert” tenant notifications requiring your attention (for example, one of your workflows encountered a processing error). A red bubble next to the icon indicates notifications are available. The number inside the bubble indicates the number of notifications on the list.

Select the icon to display your notifications. Each contains a brief description of the issue and recommended steps you can take to address the issue. Note that once you view and then close the Notifications popup window, its messages are deleted and the Notifications icon returns to an inactive state.

Dispatcher Stratus deletes system messages, including notifications, from the tenant based on the duration set in the **Data Retention** settings.

Note: Notifications also appear in your inbox.

User Menu

The User menu appears on the **Title bar**, displaying your user name and providing access to additional pages in the tenant. The pages that appear for you, and their content, may be restricted by your **user roles**. The following is a full list of available pages:

- **Switch to Manager** - Switch from the Admin site to the Tenant Manager site. This option appears only if you have the Tenant Manager role for one or more tenants.
- **Profile** - View and edit information and settings within your tenant. You can modify:
    - The appearance of your workspace in the tenant.
    - Your **out of office** status.
    - Other **user preferences**.

- **Send Feedback** - Ask questions, leave comments, and report issues you encounter while using your tenant.
- **Help** - Open the Dispatcher Stratus Online Help (the site you are currently viewing).
- **Notifications** - Create, view, and edit notifications that can be sent to selected user groups throughout the tenant.
- **Settings** - View and edit aspects of your tenant, including licenses, tenant name, time zone, language, SAML, etc.
- **Logout** - End your current connection to the Dispatcher Stratus tenant. To re-access your tenant, you can log in again.

More Helpful Links to Get You Started

Below are links to content that will help you get your tenant up and running.

- **Licensing** - Learn about purchase and upgrade options for Dispatcher Cloud products (Dispatcher Stratus and Dispatcher ScanTrip Cloud), how the licenses you purchase impact your tenant, and all the features that will be included in your package.
- **MFP App** - Learn about the Dispatcher Stratus App, which connects devices to the Stratus portal, and provides easy access to workflows at the MFP.
- **Tenancies and Onboarding** - Learn about redeeming your Dispatcher Stratus purchase code to create and configure your tenant, and how roles and permissions work within the tenant.
- **Workflow Designer** - Learn how to build unique document workflows in an intuitive environment with user-friendly features. Its WYSIWYG (What You See Is What You Get) user interface provides a clear visual depiction of the document flow.

Licensing

This page is dedicated to the licensing of Dispatcher Stratus and Dispatcher ScanTrip Cloud and covers both the licensing of each solution and the people and device licenses contained within each 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
Collect from Dispatcher Phoenix	Allows Dispatcher Stratus to accept documents and metadata from a connected Dispatcher Phoenix workflow.
DSP Web In	Allows Dispatcher Stratus to accept documents from custom-built web applications.
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.
DSP Web	Allows Dispatcher Stratus to integrate with custom-built web applications.
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.
Dropbox Connector	Scans, indexes, and distributes files to Dropbox at the MFP or via an automated workflow.
DSP Out	Allows Dispatcher Stratus to distribute documents to customized outputs via web applications.
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.
Send to Dispatcher Phoenix	Distributes documents to a connected Dispatcher Phoenix installation.
SharePoint Online Connector	Connects to Microsoft SharePoint Online, browses through SharePoint Online folders, and uploads documents to SharePoint Online repositories.
Square 9 Softworks Connector	Scans, indexes, and uploads documents to a Square 9 server.
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
Collect from Dispatcher Phoenix	Allows Dispatcher ScanTrip Cloud to accept documents and metadata from a connected Dispatcher Phoenix workflow.
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.
DSP Web	Allows Dispatcher ScanTrip Cloud to integrate with custom-built web applications.
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.
Send to Dispatcher Phoenix	Sends documents and metadata to a connected Dispatcher Phoenix 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 Invite	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 Designer				
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 Selected 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 or 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 Stratus to collect documents and start workflows. Your Dispatcher Stratus 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 Stratus 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 Stratus 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

Before you can run Dispatcher Stratus workflows on a device, you must install the free Dispatcher Stratus App onto the device. The MFP app enables you to:

- Connect the device to your tenant.

- Access your workflows at the MFP, with or without a virtual private network (VPN).
- Use single sign-on (SSO) with any supported third-party application.

Use of the MFP app requires a Konica Minolta MarketPlace account.

Getting the App Up and Running in Your Tenant

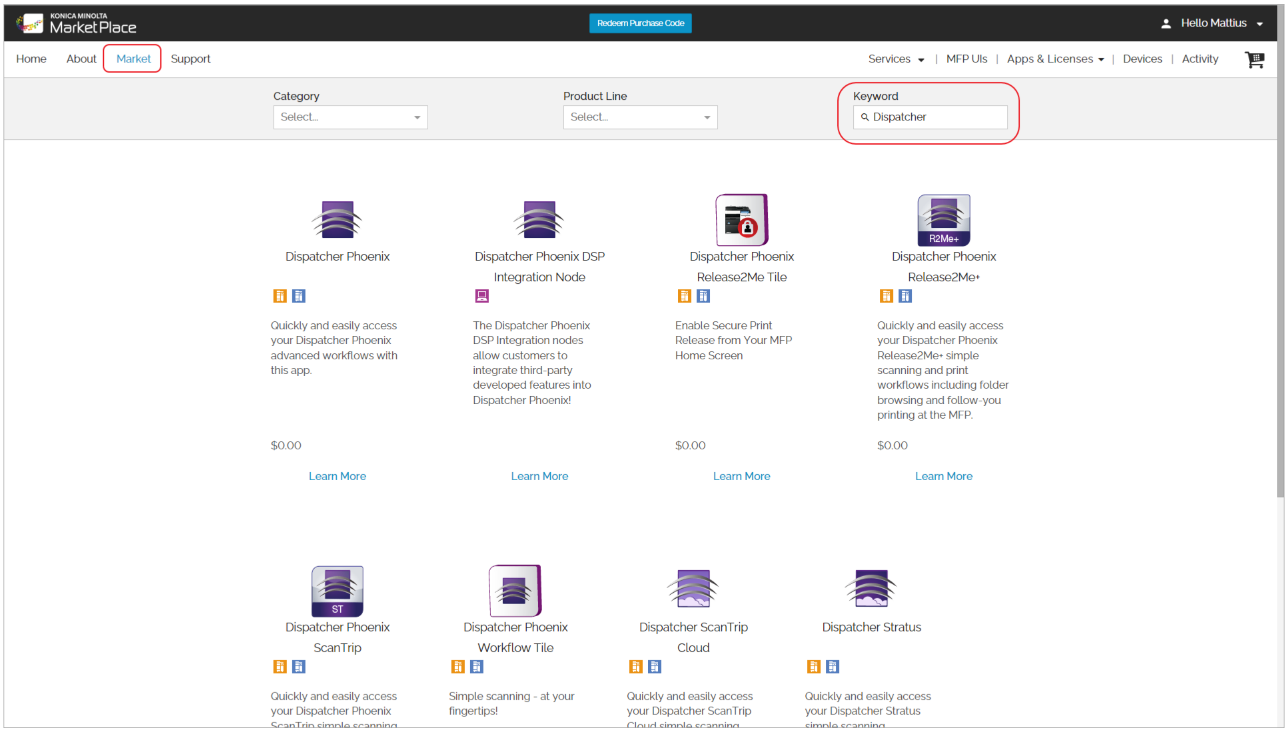
The process involves the following basic steps:

1. **Purchase the app** from MarketPlace.
2. **Install the app** onto one or more devices.
3. **Add those devices to your tenant**.

Purchasing the App

The Dispatcher Stratus App is available free from MarketPlace. If you have an available quantity of the app, you can install them onto devices. If not, you must purchase the app. Do the following:

1. Log in to your MarketPlace account, or create one if you are not registered and then log in.
2. On the Apps & Licenses page, the Apps panel lists the apps you previously purchased, and indicates the quantity available for installation for each. If you have no available quantity for the MFP app, proceed to the next step. Otherwise, you can skip the purchasing process and install your available apps onto devices.
3. To purchase the app, access the Market page, then locate the app you want to install. Use the Search field to locate the app:



4. Select the app, then continue with the purchasing process. The app is free. **MarketPlace Online Help** describes the purchasing process. Purchase an app for each device you want to use with your Dispatcher Stratus tenant.

5. Once purchased, the app appears on the Apps & Licenses page, along with your available quantity. From this page, you can **install the app** onto any device to which you have MarketPlace admin access.

Notes:

- On the MarketPlace site, for a device to appear for selection (for example, to select it for installation):
    - The MarketPlace Client must be installed on the device, which enables MarketPlace to communicate with the device.
    - You must have MarketPlace admin access to the device.
- You can also install the app directly at the MFP for devices to which you have admin access.

Installing the App

Purchased apps appear on your Apps & Licenses page on MarketPlace, as well as on the MarketPlace App Manager on devices connected to MarketPlace. You can install purchased apps onto any device connected to MarketPlace, provided you have admin access to the device. You can install either:

- **Remotely via the MarketPlace site**

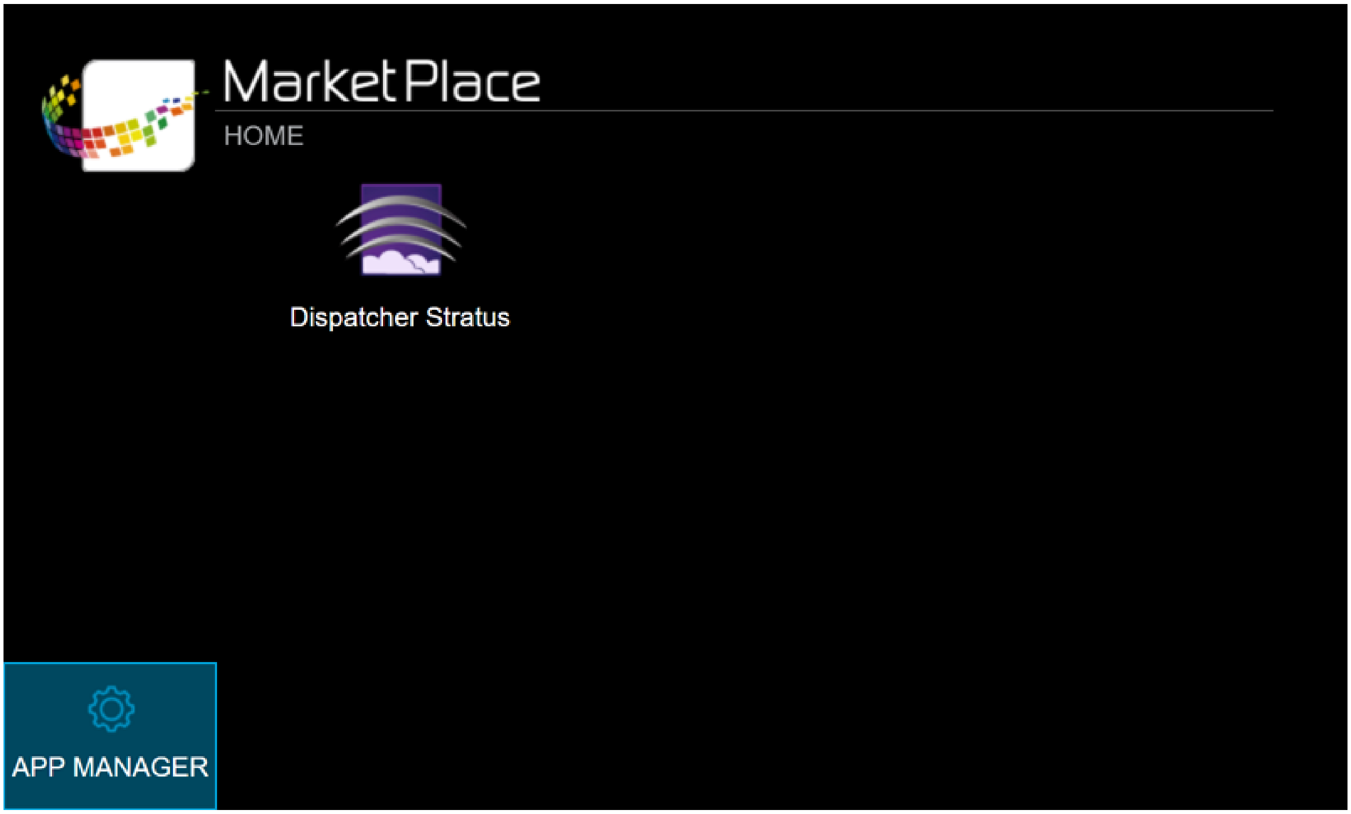
- **At the device via the App Manager**

Connecting Devices to Your Tenant

Once the MFP App is installed on a device, your tenant can see it and you can **add the device to the tenant**. You can execute workflows only on devices that have been added to your tenant.

Using the MFP App

Installing an app on a device causes the MarketPlace Apps & Licenses page to decrease the app’s Available count and add the device to that app’s list of installed devices. At the device, the app’s icon appears on the device’s MarketPlace Home page:



You can either:

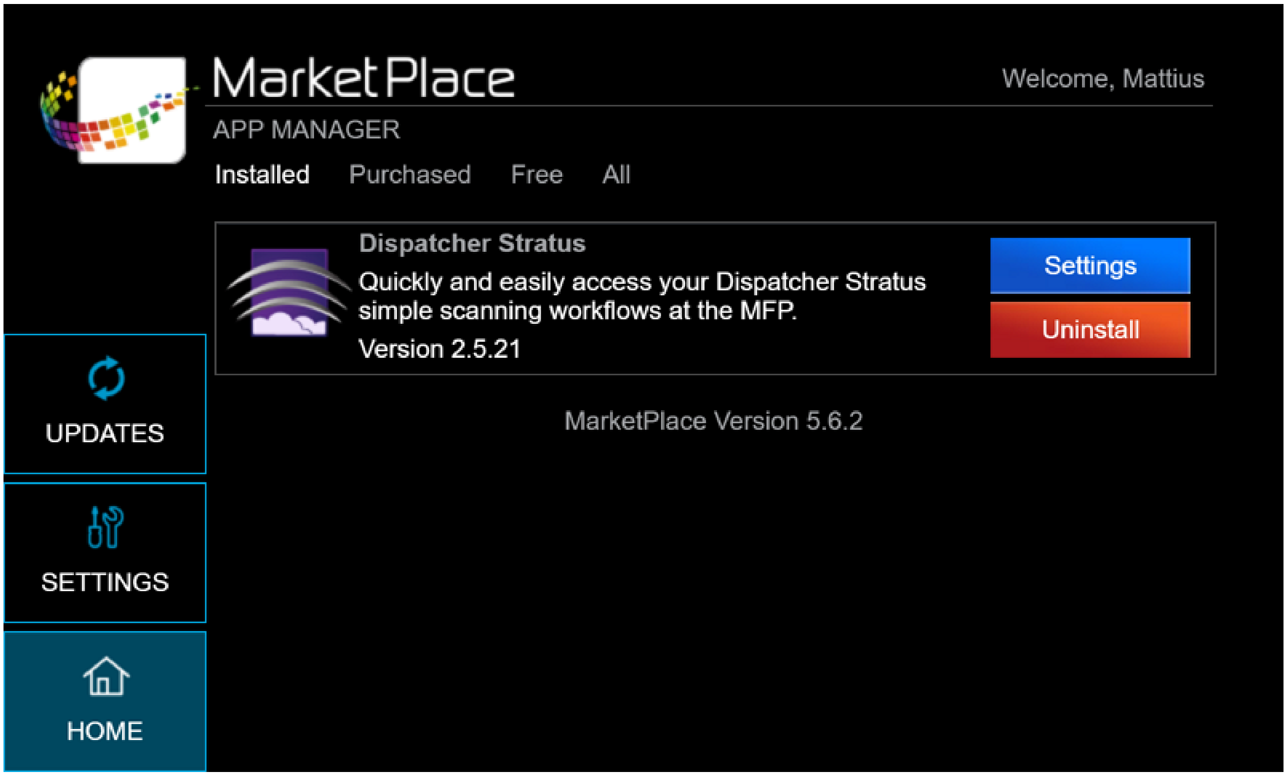
- Select App Manager to access the Settings page for the app.
- Select the icon to load the app and run workflows.

  Note: The app can run workflows only if the device has been added (connected) to your tenant.

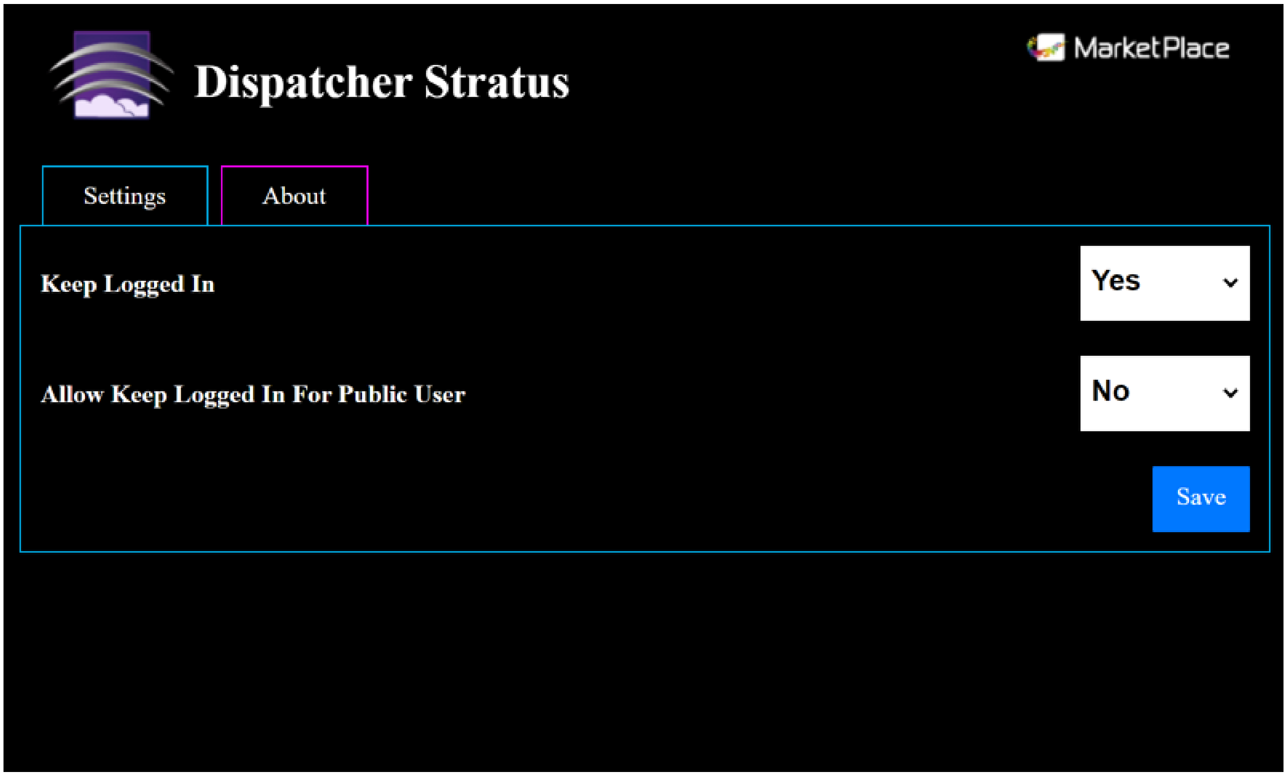
App Settings

The App Manager on a device provides access to any configuration options available for the app. The settings apply only to you when you access the device. To access the app's Settings page, do the following:

1. At the MFP, on the MarketPlace Home page, select **App Manager**. The Authenticate page appears.
2. Provide your MarketPlace credentials, and then select **Login**. You may be required to provide the device's admin password as well. Once you authenticate, the App Manager appears.
3. Select the Installed tab to display a list of your apps currently installed on the device:



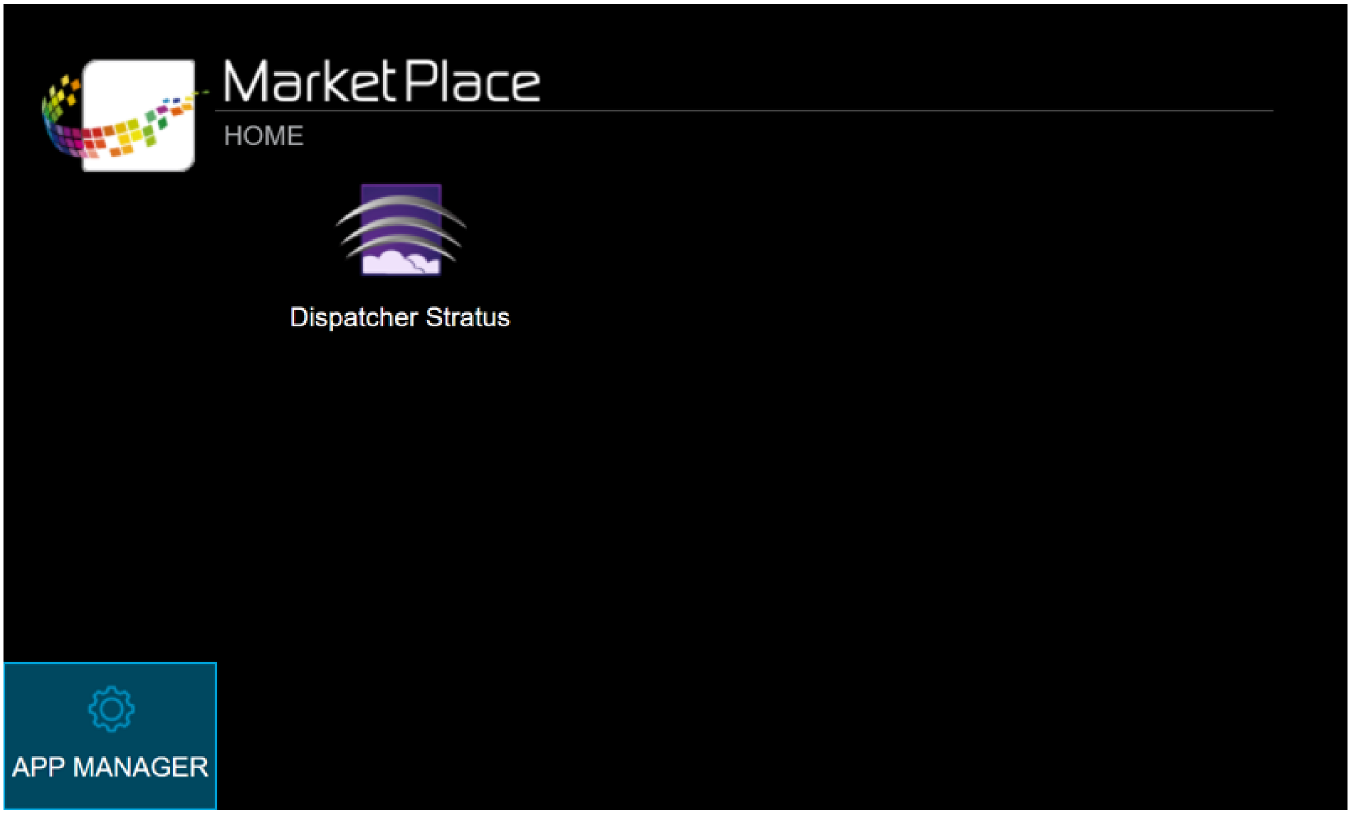
4. Locate the Dispatcher Stratus app in the list and select the **Settings** button associated with the app. The Settings screen for the app appears, displaying the following options:



- **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.
- **Allow Keep Logged in For Public User** - To allow the Public user to stay logged in, select **Yes**. Otherwise, select **No**.

Loading the App

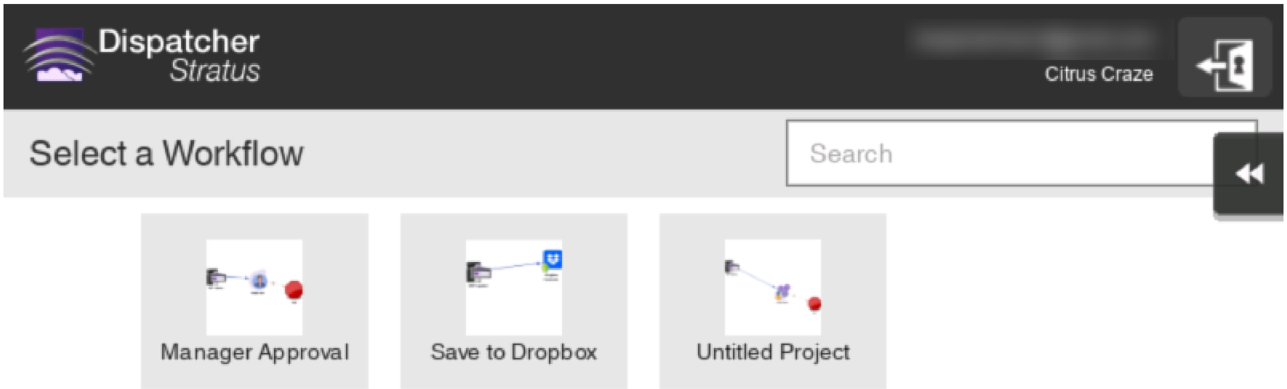
To load the MFP App at the device, access the MarketPlace Home page and select the icon for the app:



Executing a Workflow

The Select a Workflow page lists Dispatcher Stratus workflows for which the following is true:

- Current version of the workflow has been verified.
- Include an enabled **MFP Capture** collection node.
- Has been set to Run.
- Is owned by, or has been shared with, you.
- Has been shared with the device.



To execute a workflow, select its icon. The workflow appears, and you can now perform any required steps that were configured for the workflow, such as:

- Log in to a third-party CMS for distribution
- Adjust scan settings
- Enter additional information about the document, etc.

For more information, see the **Workflow Management** and **Using the Workflow Designer** topics.

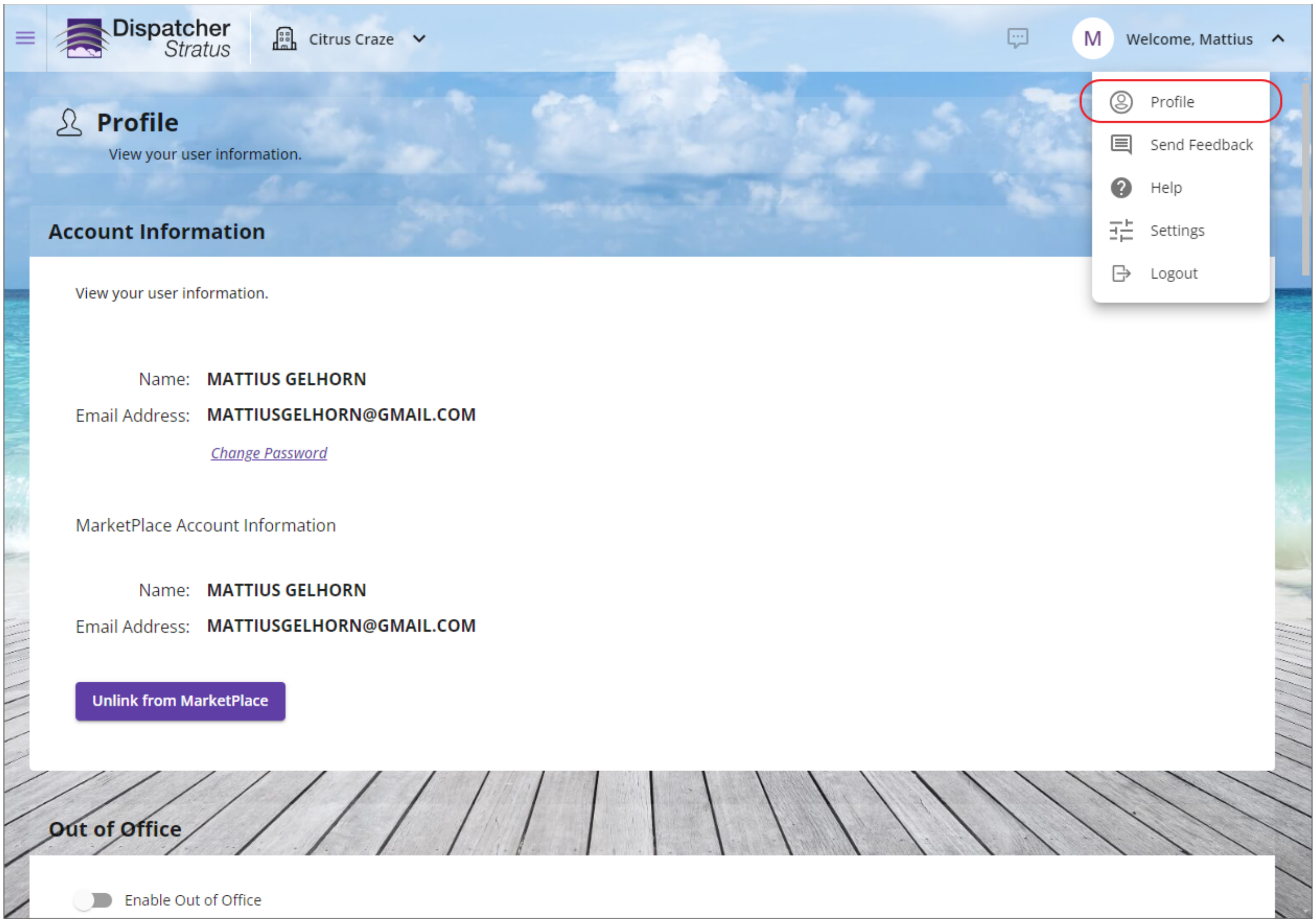
Logging Out of the App

To log out of the app at the device, you have the following options:

Icon	Name	Description
	Logout button	Logs you out of the app and returns you to the app’s Login page.
	Home button	Logs you out of the app and returns you to Home page configured for the device.

Profile

Your Profile page displays your tenant account information and also provides customization options via which you can modify the appearance of your workspace. 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 Stratus 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.

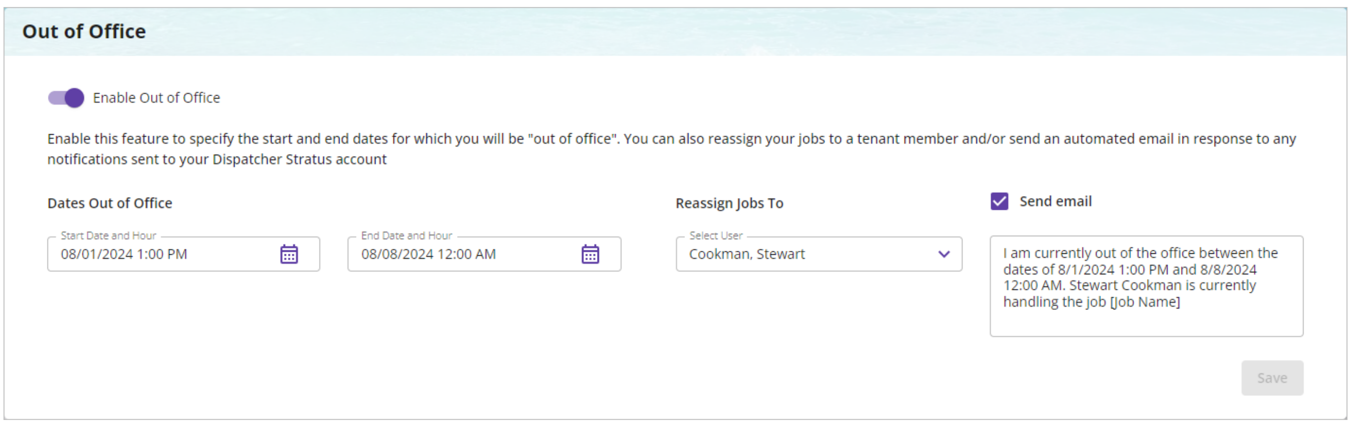
Out of Office

Use this section to designate yourself as “out of office” within your tenant. You can:

- Specify a period of time during which you will be out of office.
- Select a tenant member to assume your tenant **ownerships** and take over any activity associated with those ownerships while you are out of office.
- Send an automated “out of office” email message whenever you receive a notification from the tenant while you are out of office.

Note: This area is active only for tenant members with the **Users/Out of Office** permission.

The following illustration shows a user who will be out of office for one week in August. During that time, the user’s jobs will be reassigned and an automated email will be sent in response to notifications received by the user’s Dispatcher Stratus inbox.



Configuration Options

The **Enable Out of Office** toggle indicates your current status. If enabled, you can edit your current configuration. If disabled, you can enable it and configure your out-of-office settings.

Once you enable this feature, the following options activate:

- **Dates Out of Office** - Specify the start and end dates of the period you will be out of office. The system records a log of this action.
  - **Start Date and Hour** - Defaults to the top of the next hour, but you can enter a future date/hour.
  - **End Date and Hour** - You must manually enter an end date and time.
- **Reassign to** - You can choose a member to assume your current tenant ownerships and take up any activity associated with those ownerships while you are out of office. All of your tenant notifications will be redirected to this member (the “recipient”), and all of your workflows will

be shared with the same member. If you select “Do Not Reassign”, job activity requiring your input will not progress.

- **Send Email** - Send an automated email in response to any tenant notifications sent to you while out of office. A default outgoing message is provided, but you can customize it. In addition, if you choose to reassign your activity, an automated message will be sent to the recipient when your out of office period begins.

Note: The **Save** button is active only when changes are pending. Once you save your changes, your out of office status updates.

About Reassigning Jobs

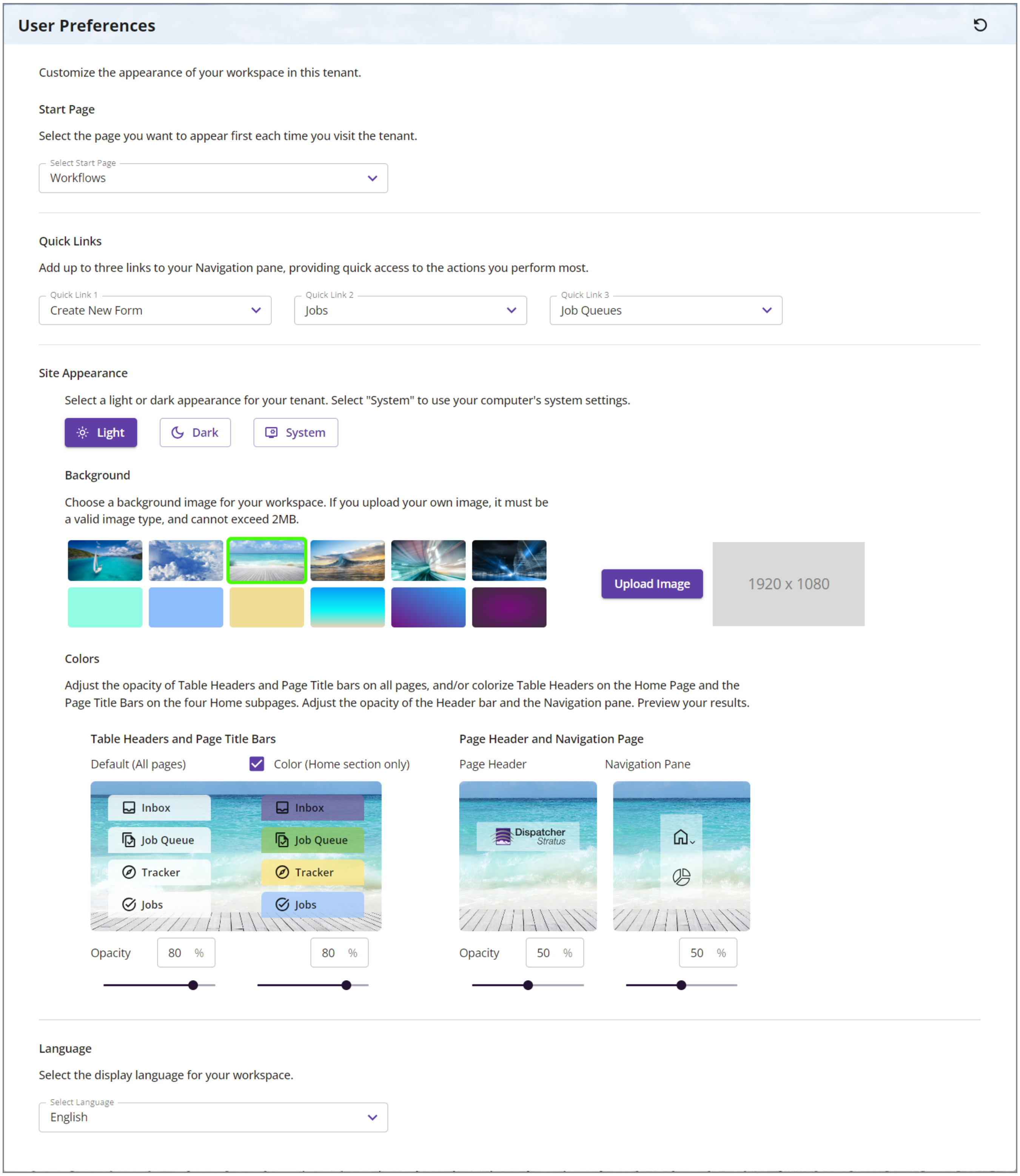
- Reassigning jobs affects many elements of Dispatcher Stratus and frequent reassignments can disrupt the continuity of tasks. We recommend you use this feature with care.
- Once a job is reassigned away from you through this process, it cannot be undone. To regain ownership of the job, a tenant member must assign it back to you as part of a configured workflow.
- If you are currently “out of office” (that is, **Enable Out of Office** is toggled on), and you are configured to reassign jobs, changing the recipient will affect only future jobs. Jobs already reassigned will remain with their recipient.

Returning to the Office

When your out of office period expires, new activities will again be directed to you and all ownerships except jobs will revert back to you. Reassigned jobs remain with the recipient.

User Preferences

This section contains customization options, via which you can modify the appearance of your tenant workspace to suit your personal preferences. A partial view of the User Preferences section appears below:



Start Page

Select the page you want to appear first each time you visit the tenant. You have the following options:

Home	Inbox	Reports	Job Queue
Tracker	Dashboard	Workflows	Reports
Devices	Users	Forms	Logs

Quick Links

Add up to three links to your Navigation pane, providing quick access to the actions you perform most. You have the following options:

None	Add Task	Create Workflow	Import Devices
Invite Users	Customize	Help	

Site Appearance

Use these options to customize the appearance of portal pages. The following sections describe your options. Select various combinations to preview the results. These selections will also be reflected in the **Form Builder** tool.

Theme

Select a “theme” for your workspace. Choose one of the following options. Your screen updates so you can preview the appearance:

- Light
- Dark
- System (your computer’s system settings)

Background

Choose a background image for your workspace. If you upload your own image, it must be a valid image type, and cannot exceed 2MB. We recommend the following dimensions:

- 1920 x 1080

Colors

Use this section to colorize the headers in your workspace and adjust their opacity with respect to the selected background image.

Table Headers

Adjust the opacity of table headers, and/or colorize them, by moving the sliders. The box above the sliders adjusts to show the result. You can also view the Account Information and User Preference headers on this page, or navigate to another page containing headers such as the Devices page.

Header bar and Navigation pane

Adjust the opacity of the Header bar and the Navigation pane by moving the sliders. The box above the sliders adjusts to show the result. You can also view the header on this page, or navigate to another page containing headers such as the Devices page.

Data Retention

Specify how long you want your tenant to preserve system messages generated for you. You can set the duration for the following message types:

- Informational messages
- Error messages
- Job messages
- Other messages

Messages will remain in your inbox for the specified duration. Options include:

- 1 Day
- 7 Days (Default)
- 30 Days
- 90 Days
- 180 Days
- 365 Days

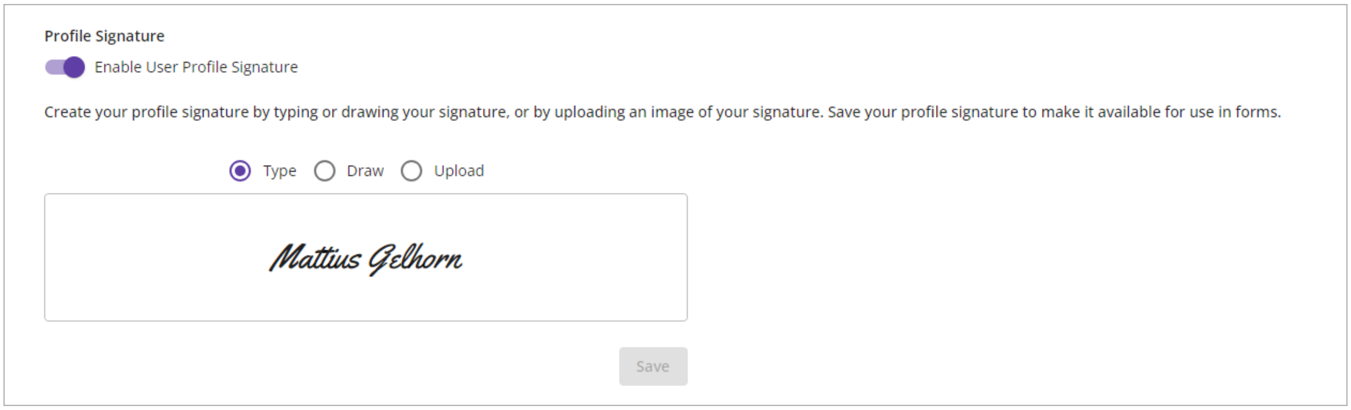
Notes:

- Updates to these settings affect only messages generated after the update. Existing messages will honor the setting as it was configured at the time they were generated.
- The Data Retention setting does not affect the duration of **System Notifications**.

Profile Signature

An electronic signature, or eSignature, is data that is logically associated with other data and which is used by the signatory to sign the associated data. This type of signature has the same legal standing as a handwritten signature, as long as it adheres to the requirements of the specific regulation under which it was created (for example, eIDAS in the European Union or NIST-DSS in the United States). Note that electronic signatures are a legal concept distinct from digital signatures.

You can create a default electronic signature for use in Dispatcher Stratus forms in which a **Signature field** is included. If you enable your signature here, it becomes available for selection on forms requiring your signature. Your profile signature is available only to you, and only for use within the tenant.



Note: Your profile signature is distinct from a **signature you create in a rendered form**.

Creating a Profile Signature

To create your profile signature, do the following:

1. Select **Enable User Profile Signature** until the toggle slides to the right side.
2. Select an input method. You have the following options:
    - Type - Type in your signature using your keyboard. The name associated with your profile defaults, but you can edit it. The signature's font type is pre-defined and you cannot change it.
    - Draw - Draw your signature using your finger, your pointer, or a stylus (if you have one).
    - Upload - Browse for an existing electronic signature stored on a connected device. The following file types are supported, with a maximum file size of 2 MB:
        - .PNG
        - .JPG
3. If you draw or upload a signature, the **Clear Signature** link appears. You can clear the current signature and create a new one or, if you are satisfied with the current signature, click away from the entry field.

Once you save and exit the Profile page, the signature becomes your profile signature and is available for selection by you on forms created in the Form Builder. If you ever disable your signature, Stratus will preserve it so that you can use it again.

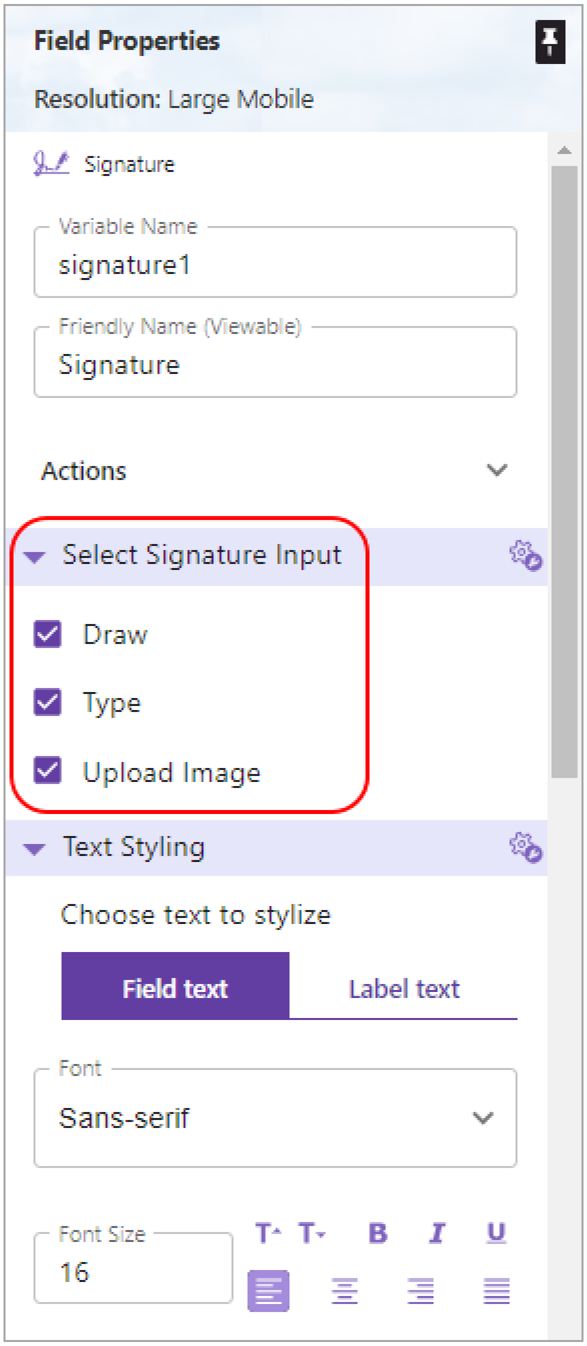
Note: When adding your electronic signature to a form, the Signature window includes a link to your Profile page, where you can create a new signature and save it as your default signature. You can then return to the form and use your new profile signature.

Signature Options in the Form Builder

Forms are created in the **Form Builder**. The Form Builder enables a form's creator to include a **Signature field** in the form, and to provide the form's respondents with up to three ways to enter their electronic signature on the form:

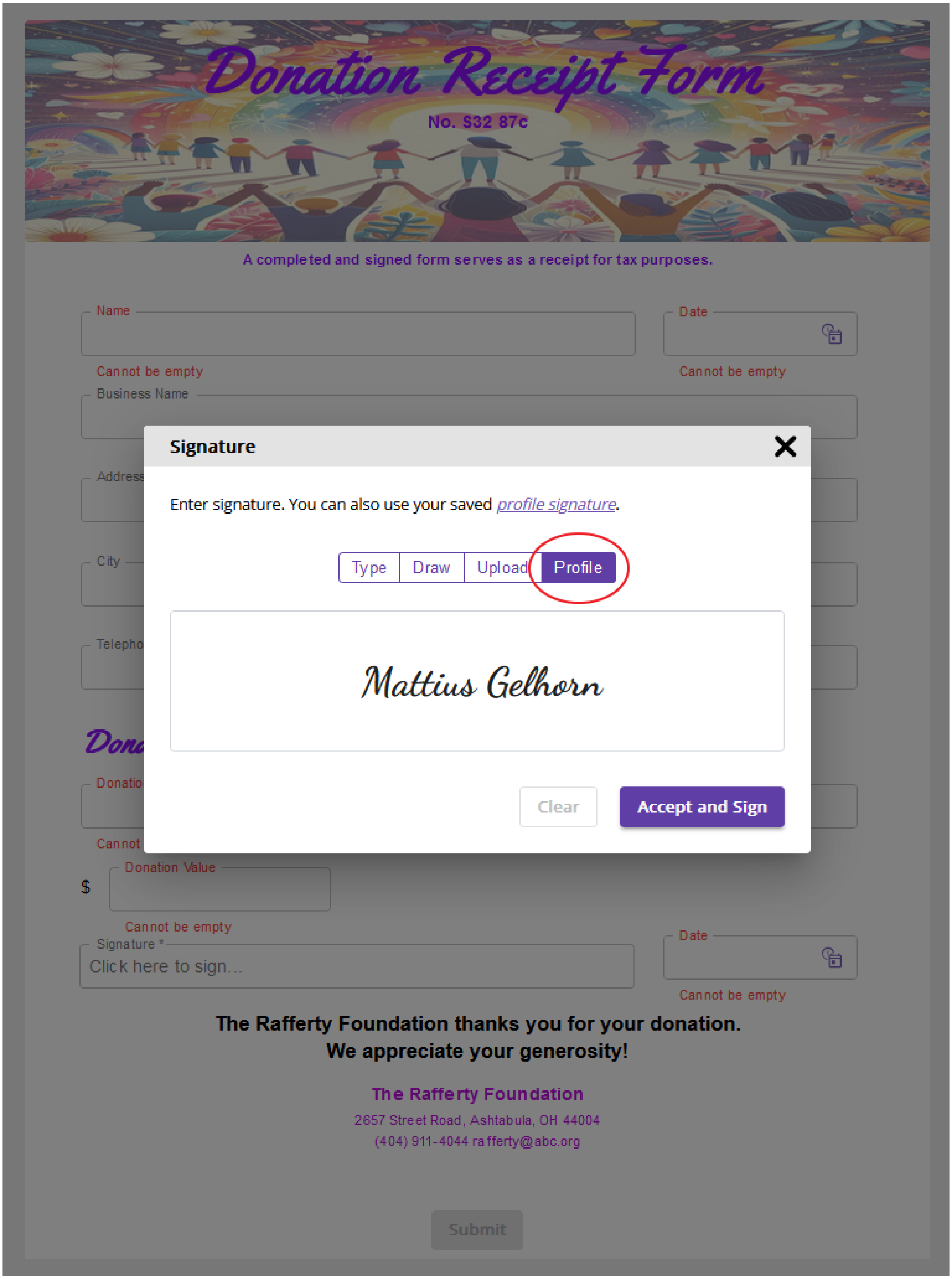
- Type - Type in the signature using a keyboard.
- Draw - Draw the signature using a finger, mouse, or stylus.
- Upload - Browse for an existing electronic signature stored on a connected device.

In the following illustration showing the Properties panel in the Form Builder, a Signature field has been added to a form and selected for editing. All three signature types are selected, so that users of the rendered form will have all three options to choose from.



Selection Options for the Signature Window on a Rendered Form

The Form Builder does not include Profile as a selection option. The Profile option is available for selection only on a rendered form, and only for users who have enabled their profile signature on their Profile page. In the following illustration, the Profile option is active and selected on a rendered form:


Donation Receipt Form
No. S32 87c
A completed and signed form serves as a receipt for tax purposes.
Name
Cannot be empty
Date
Cannot be empty
Business Name
Address
City
Telepho
Donatio
Cannot
Signature
Enter signature. You can also use your saved profile signature.
Type
Draw
Upload
Profile
Mattius Gelhorn
Clear
Accept and Sign
$
Donation Value
Cannot be empty
Signature *
Click here to sign...
Date
Cannot be empty
The Rafferty Foundation thanks you for your donation.
We appreciate your generosity!
The Rafferty Foundation
2657 Street Road, Ashtabula, OH 44004
(404) 911-4044 rafferty@abc.org
Submit

Note: Your profile signature is not affected by any signatures you create and submit in a rendered form. You can only create or edit your profile signature on the Profile page.

Language

Select the display language for your workspace. You have the following options:

English	Japanese	French
Spanish	German	Italian

Requirements

Dispatcher Stratus 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 Stratus is optimized for the following devices:

- Tablets
- Laptops
- Desktop Computers

Workflow Designer Requirements

While the Dispatcher Stratus portal is fully web-based, the Workflow Designer 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 Stratus features, MFPs must have:

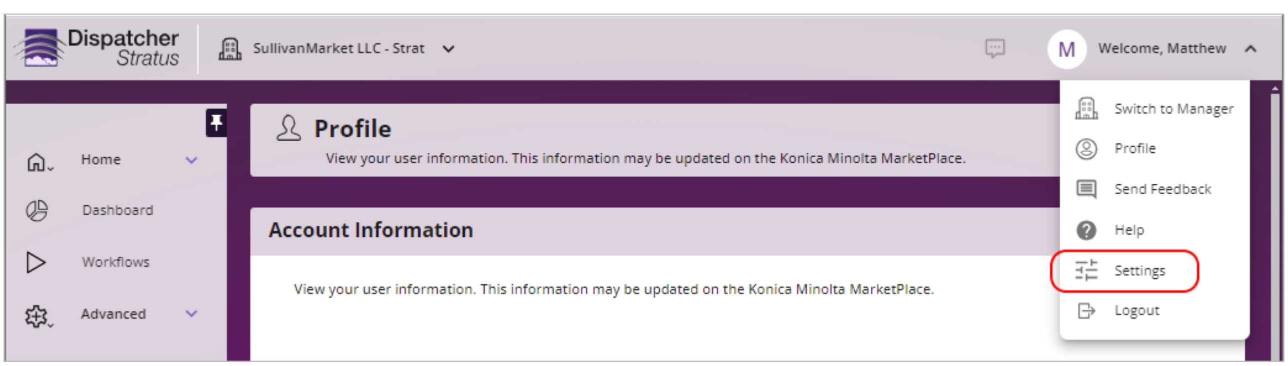
- Browser capabilities and/or IWS capabilities. The **IWS application** must be installed on each Konica Minolta MFP you expect to use to access workflows.
- A valid Dispatcher Stratus login.
- A license from the tenant purchased and assigned to that device.
- A proper configuration for Authentication.

  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.

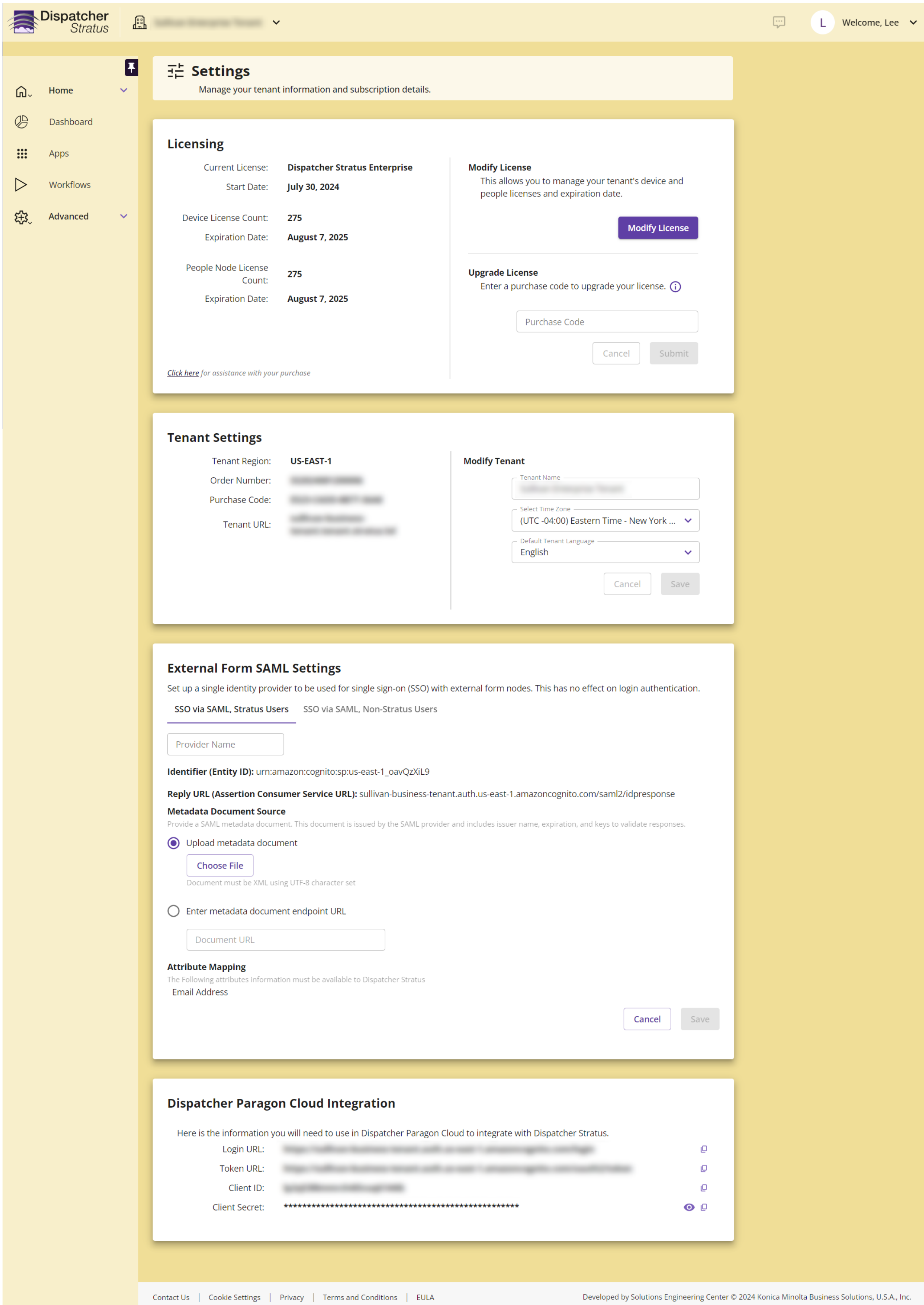
Settings

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:

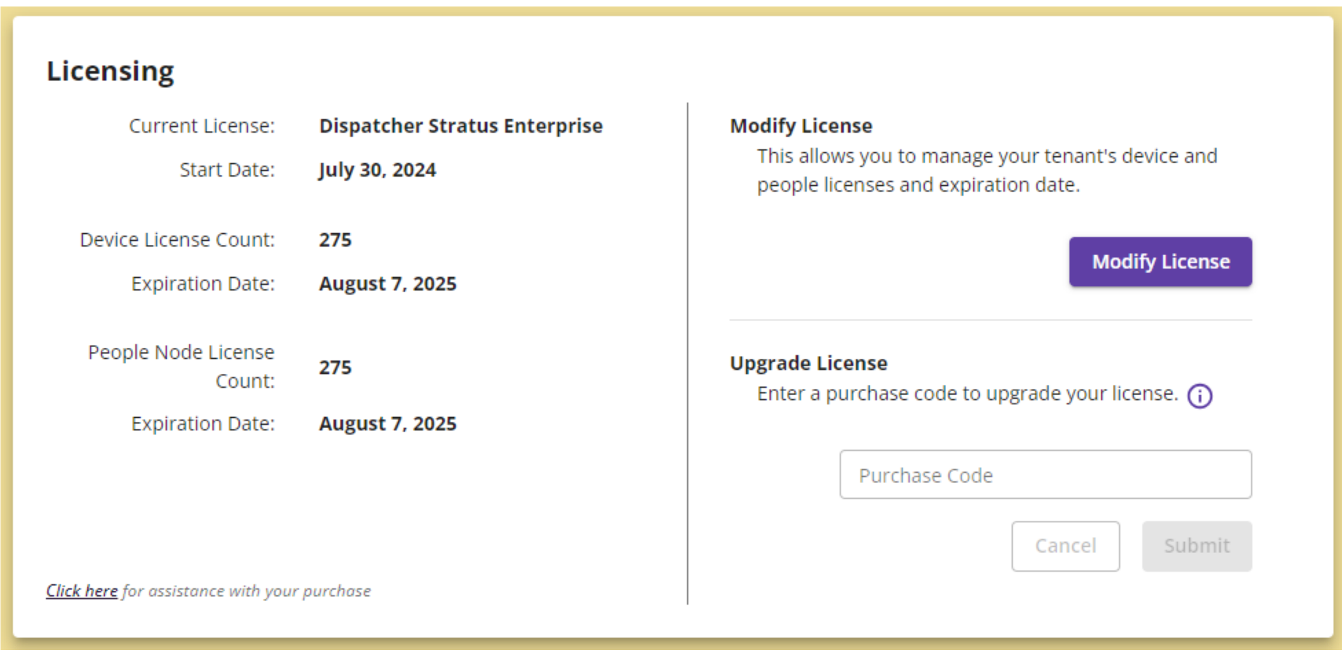

Dispatcher Stratus
Welcome, Lee
Home
Dashboard
Apps
Workflows
Advanced
Settings
Manage your tenant information and subscription details.
Licensing
Current License: Dispatcher Stratus Enterprise
Start Date: July 30, 2024
Device License Count: 275
Expiration Date: August 7, 2025
People Node License Count: 275
Expiration Date: August 7, 2025
Click here for assistance with your purchase
Modify License
This allows you to manage your tenant's device and people licenses and expiration date.
Modify License
Upgrade License
Enter a purchase code to upgrade your license.
Purchase Code
Cancel
Submit
Tenant Settings
Tenant Region: US-EAST-1
Order Number:
Purchase Code:
Tenant URL:
Modify Tenant
Tenant Name
Select Time Zone
(UTC -04:00) Eastern Time - New York ...
Default Tenant Language
English
Cancel
Save
External Form SAML Settings
Set up a single identity provider to be used for single sign-on (SSO) with external form nodes. This has no effect on login authentication.
SSO via SAML, Stratus Users
SSO via SAML, Non-Stratus Users
Provider Name
Identifier (Entity ID): urn:amazon:cognito:sp:us-east-1_oavQzXiL9
Reply URL (Assertion Consumer Service URL): sullivan-business-tenant.auth.us-east-1.amazoncognito.com/saml2/idpresponse
Metadata Document Source
Provide a SAML metadata document. This document is issued by the SAML provider and includes issuer name, expiration, and keys to validate responses.
Upload metadata document
Choose File
Document must be XML using UTF-8 character set
Enter metadata document endpoint URL
Document URL
Attribute Mapping
The Following attributes information must be available to Dispatcher Stratus
Email Address
Cancel
Save
Dispatcher Paragon Cloud Integration
Here is the information you will need to use in Dispatcher Paragon Cloud to integrate with Dispatcher Stratus.
Login URL:
Token URL:
Client ID:
Client Secret: **
Contact Us | Cookie Settings | Privacy | Terms and Conditions | EULA
Developed by Solutions Engineering Center © 2024 Konica Minolta Business Solutions, U.S.A., Inc.

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
- **People Node License Count** - The current People Node license 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.

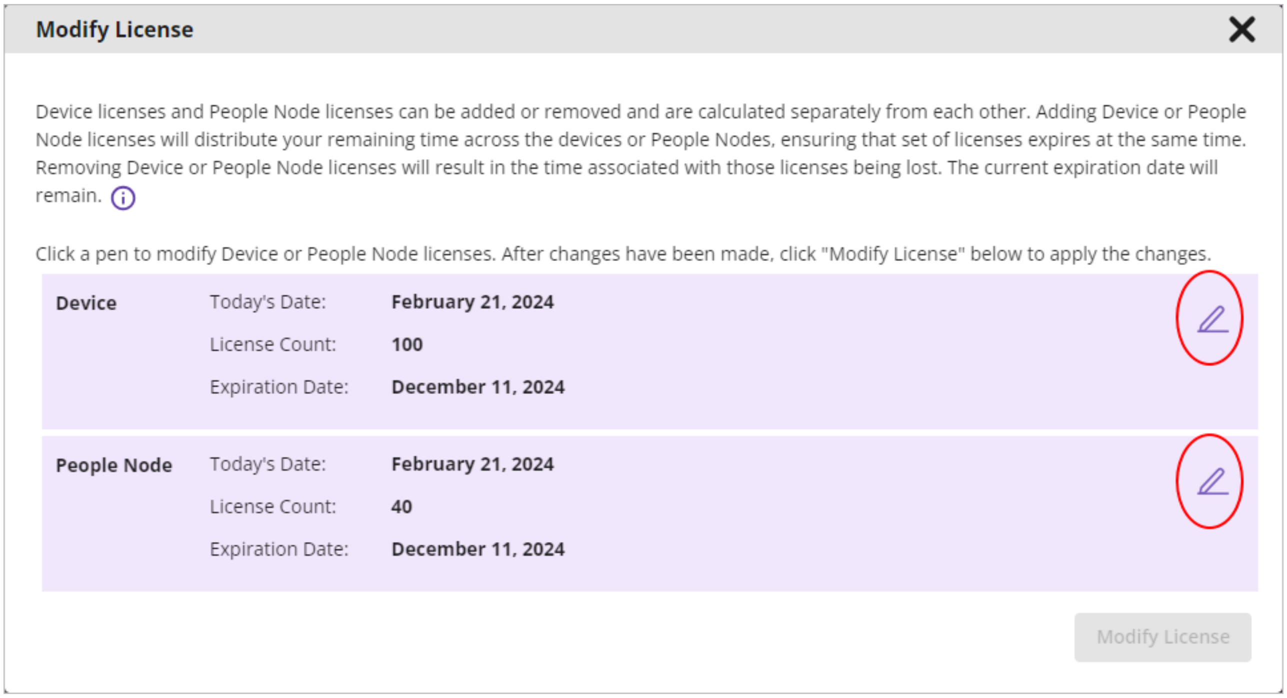
Notes:

- 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.

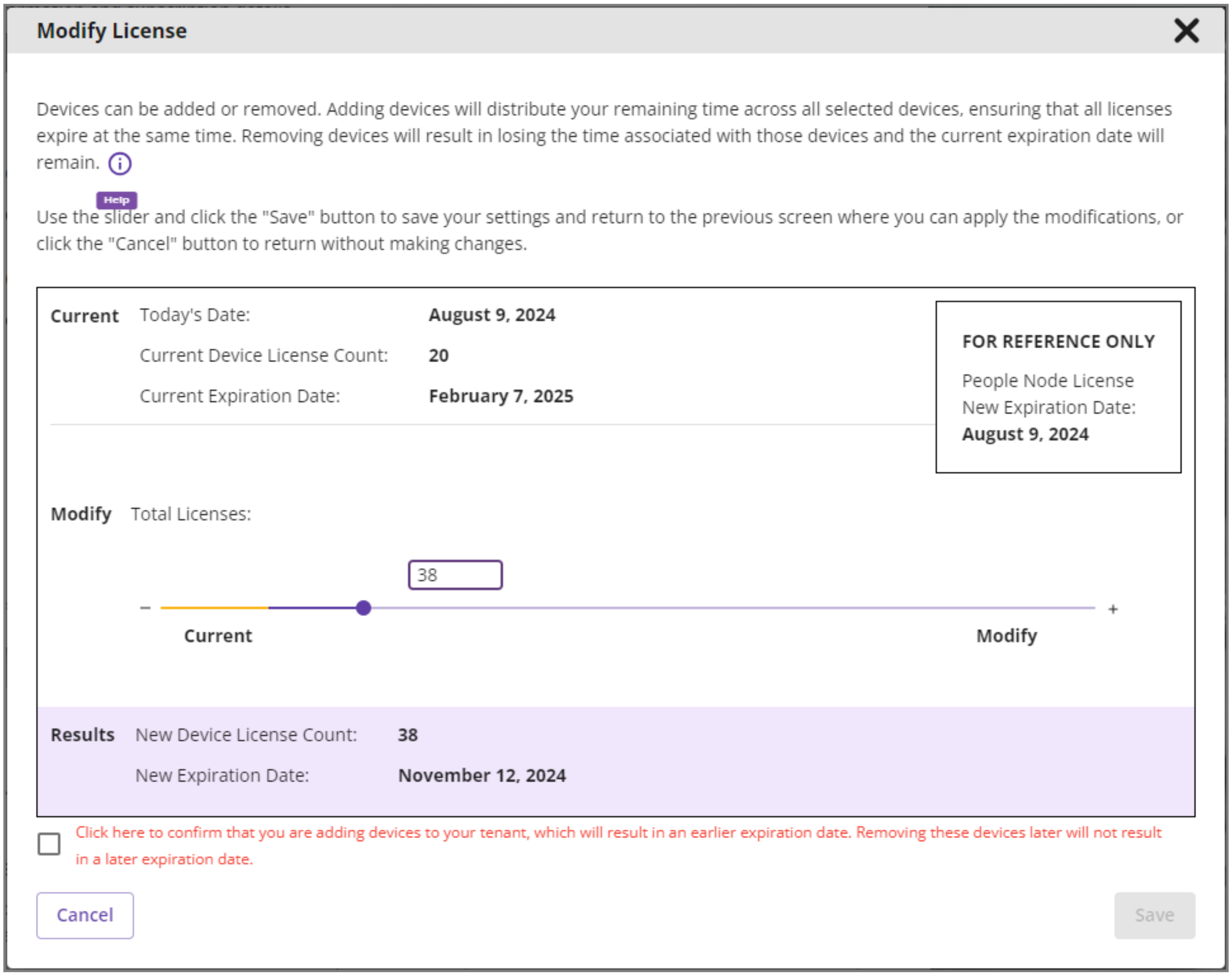
Increasing Your License Count

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.

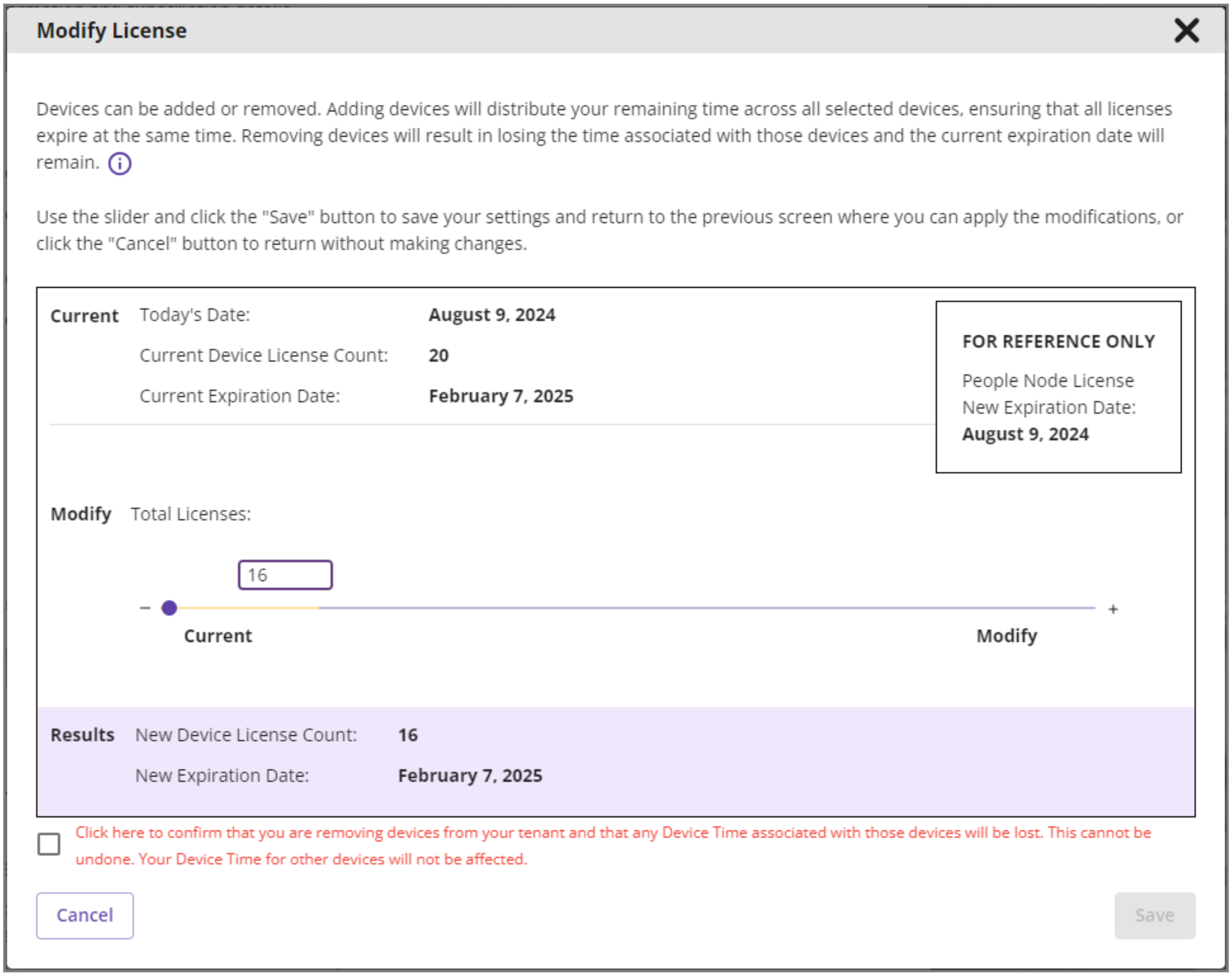
Decreasing Your License Count

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.

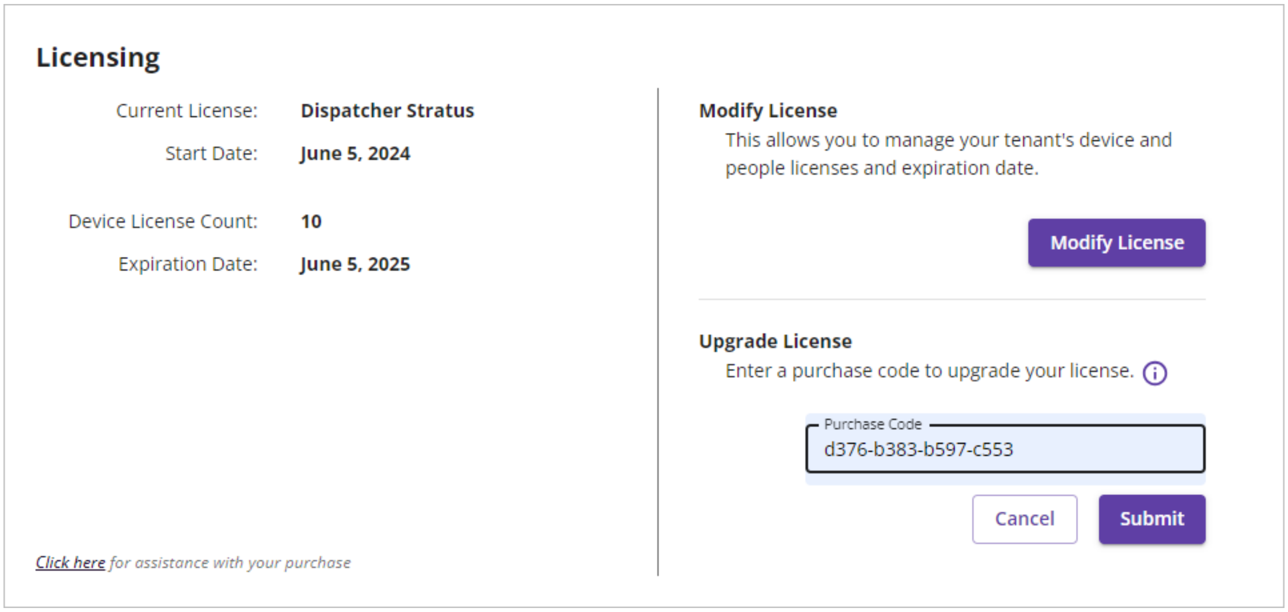


Upgrading a License

You can upgrade your license by redeeming a valid purchase code. A license upgrade enables you to increase the license count and/or remaining service time in your tenant.

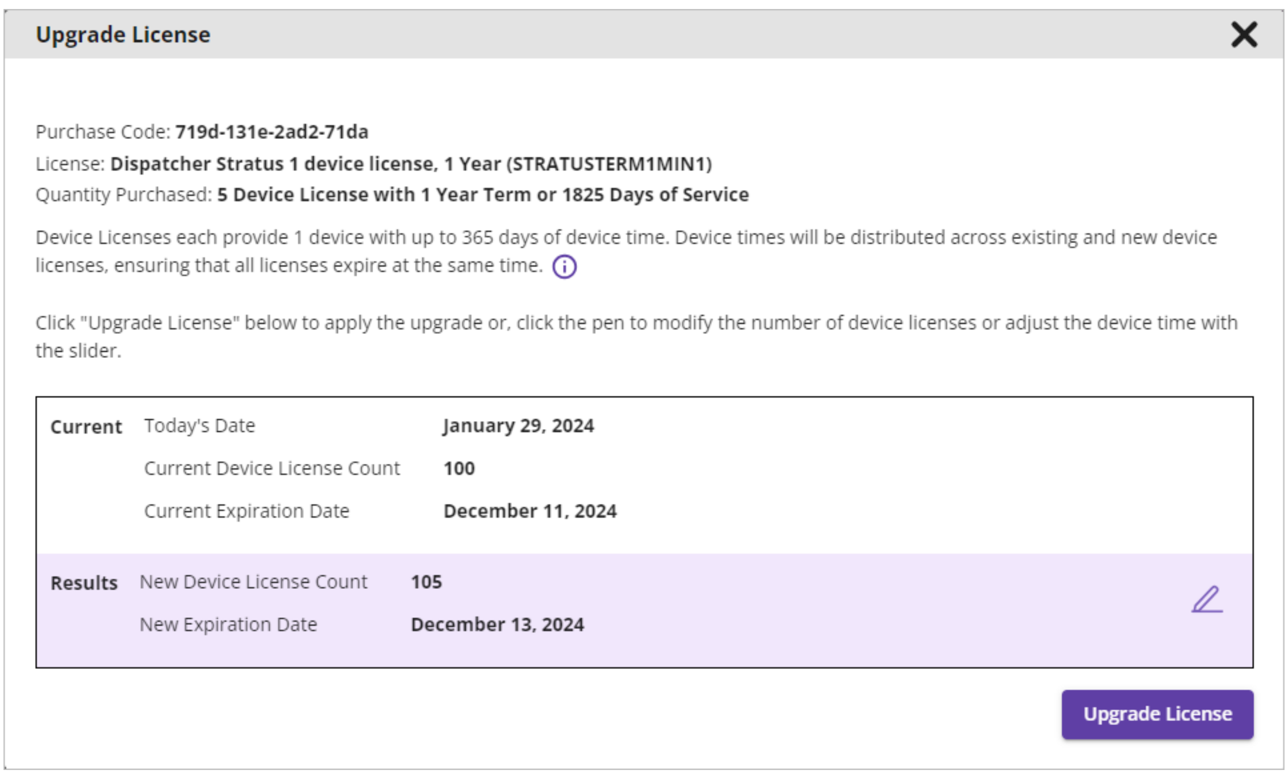
1. Purchase an upgrade license from your Konica Minolta sales representative, specifying the quantity of device licenses and/or service time you want to add to the license. Your sales rep will provide you with a purchase code, for example, via email.

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.

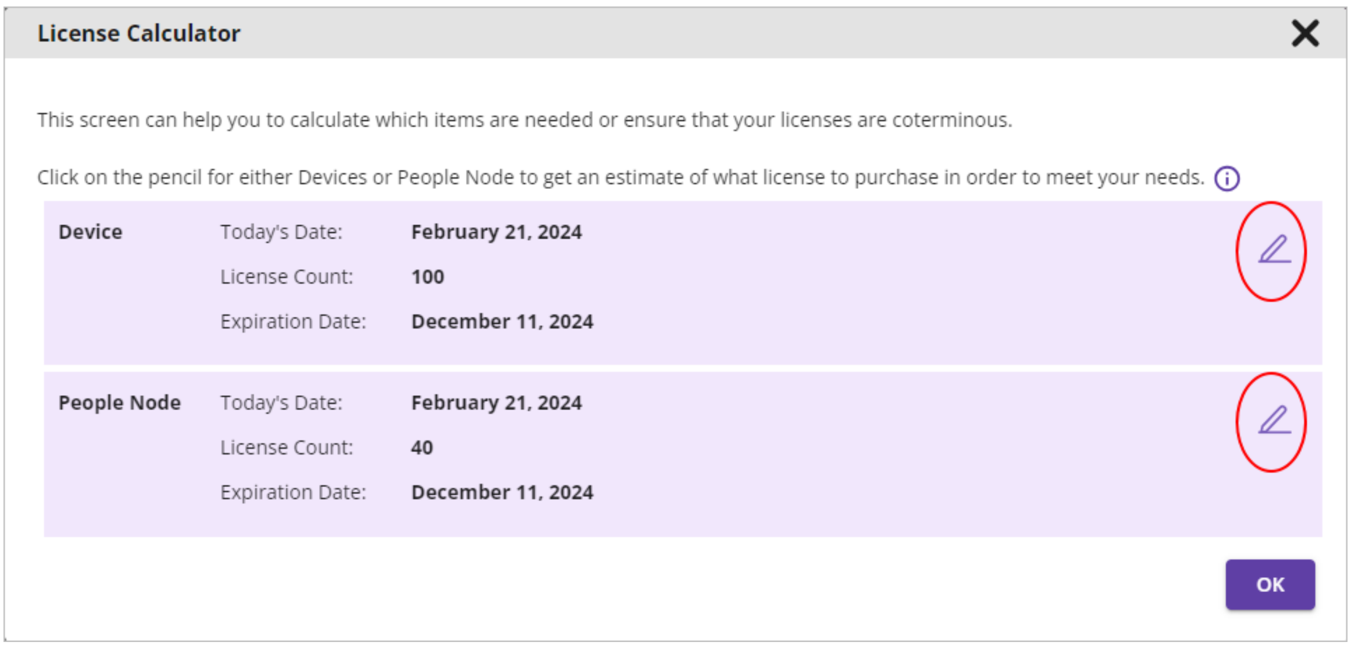
6. To activate your upgraded license, select **Upgrade License**.

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

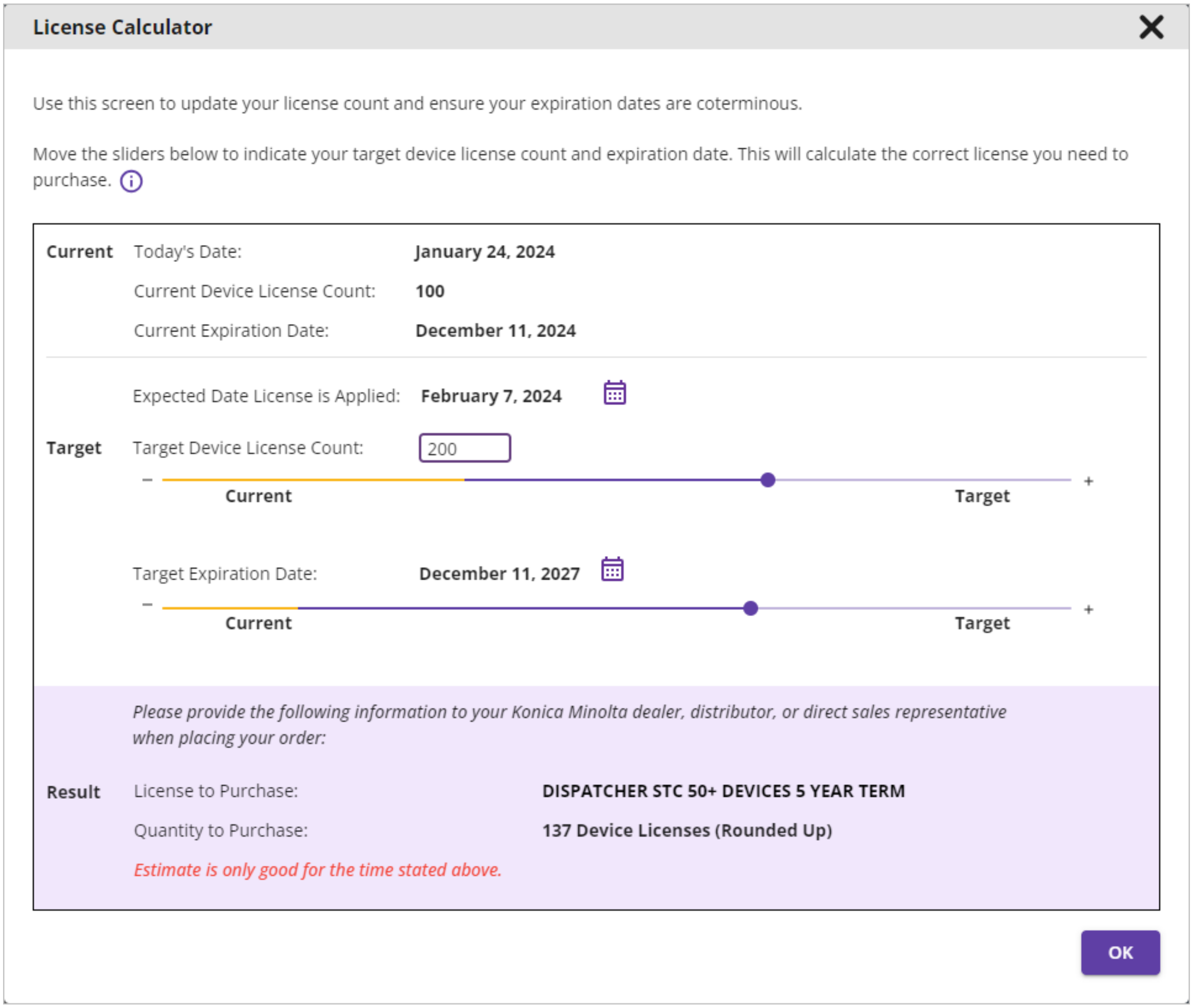
License Calculator

The License Calculator is a tool you can use to forecast **license distributions** for a proposed purchase of a Dispatcher Stratus 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 Stratus assigns the same expiration date to all licenses of a type (for example, Device licenses). Thus, when Dispatcher Stratus 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 Stratus 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 or 1 People Node license)
- A term of service (1 year)

License purchases can include an extended term of service (in years) and multiple Device and/or People Node 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 Stratus 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 license counts display 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.

People Node License Count

A tenant’s People Node license count displays in the Licensing area of the Settings page. This number represents the maximum number of People Node licenses that can currently be assigned to tenant members, enabling those members to participate in People Node workflows in the tenant.

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

- Assigned licenses - Licenses that have been added to the tenant and assigned to a tenant member.
- Unassigned licenses - Licenses not currently assigned to a tenant member, 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:

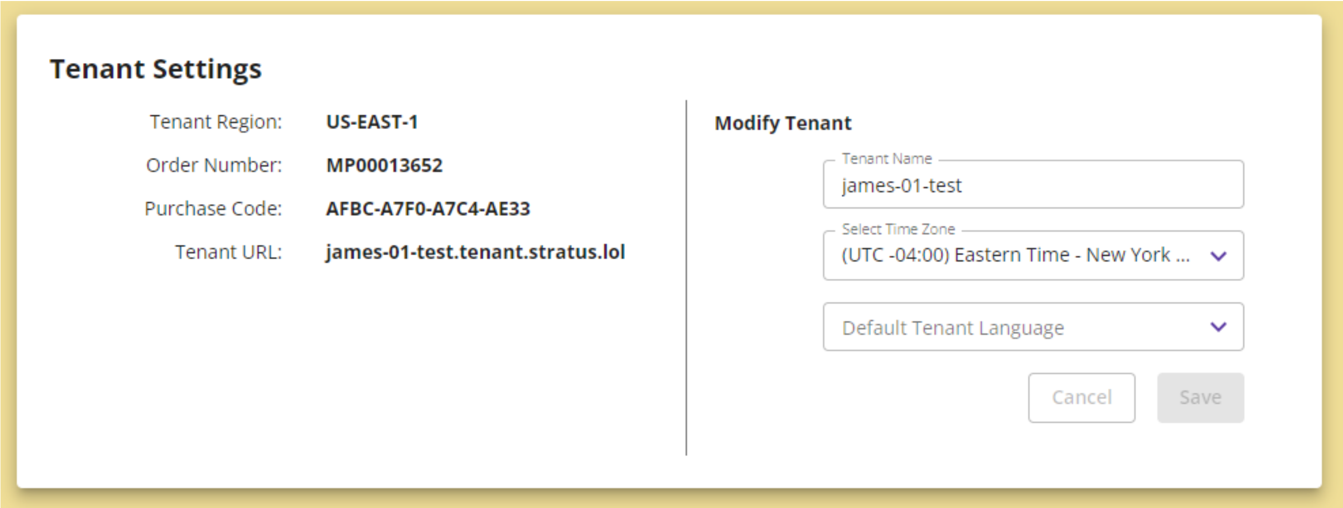
Device Licenses	Device Count	Months of Service
10	5	24
10	10	12
10	20	6

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.



Note: The image depicts a Dispatcher Stratus - Enterprise tenant.

Modify Tenant

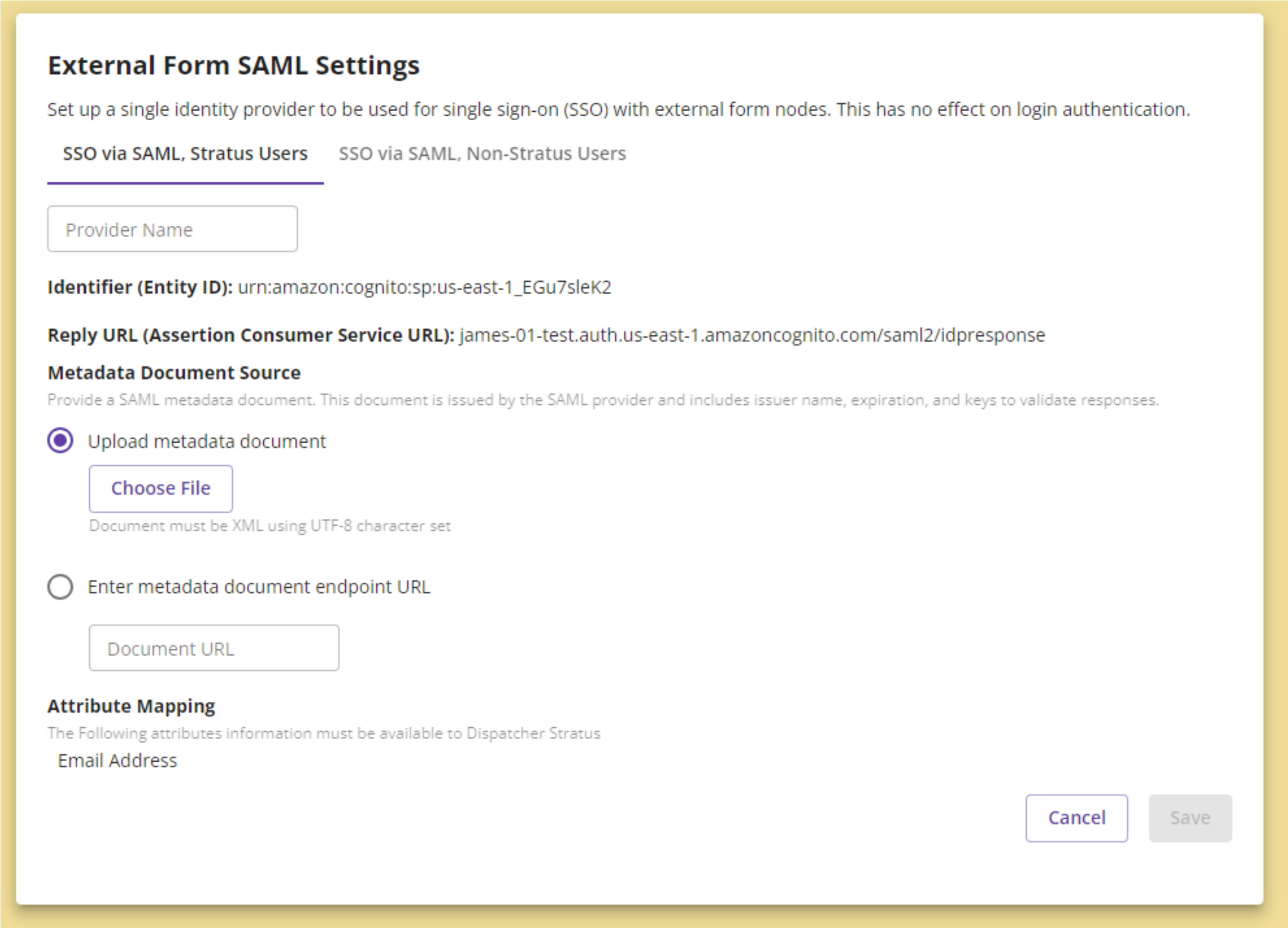
You can modify the following information about the tenant:

- 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**.

External Form SAML Settings

Security Assertion Markup Language (SAML) allows for single sign-on (SSO) authentication to Dispatcher Stratus **External Forms**. Dispatcher Stratus supports two SAML configurations, one for Dispatcher Stratus users and one for non-Dispatcher Stratus users.



To configure SSO via SAML for either Dispatcher Stratus users or non-Dispatcher Stratus users, do the following:

1. Select either the **SSO via SAML, Stratus Users** or **SSO via SAML, Non-Stratus Users** tab. By default, the Stratus Users tab is selected.
2. Enter the SAML **Provider Name** in the field provided.
3. Select how you would like to provide SAML metadata:
   - Upload metadata document - Document must be an XML file using the UTF-8 character set. Use the **Choose File** button to navigate to the correct document.
   - Enter metadata document endpoint URL - Enter the URL in the field provided.
4. Select the **Save** button.

   Note: The Provider Name:

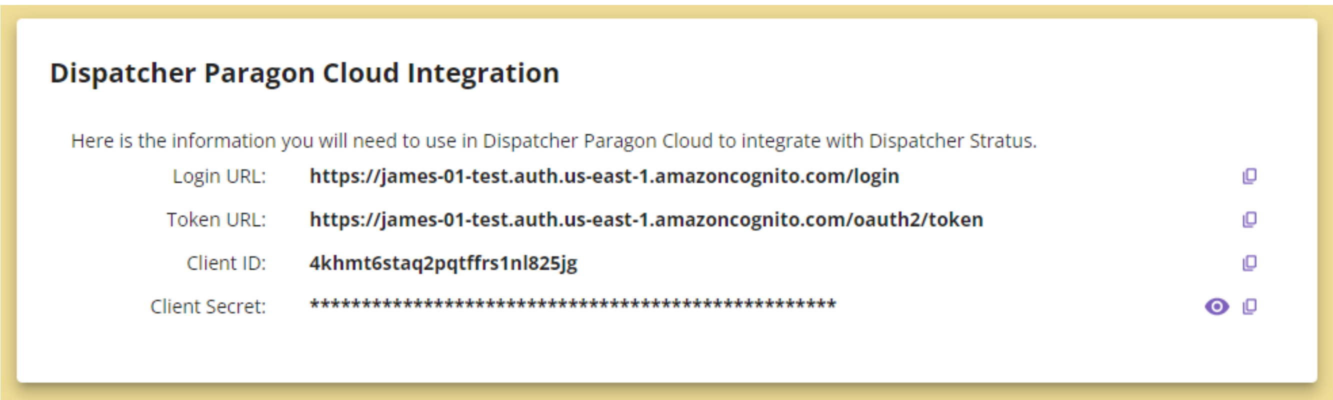
   - Must contain at least 3 characters.
   - Must not start with a space or an underscore _ character.
   - Can contain any other combination of ASCII characters.

Additional information provided in this area:

- Identifier (Entity ID) - a unique string used for SAML authentication and authorization
- Reply URL (Assertion Consumer Service URL) - a service provider endpoint that receives and parses a SAML assertion from an identity provider (IdP)
- Attribute Mapping - This section lists the attributes within a SAML assertion that must be available to Dispatcher Stratus.

Dispatcher Paragon Cloud Integration

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



Dispatcher Stratus provides the following information:

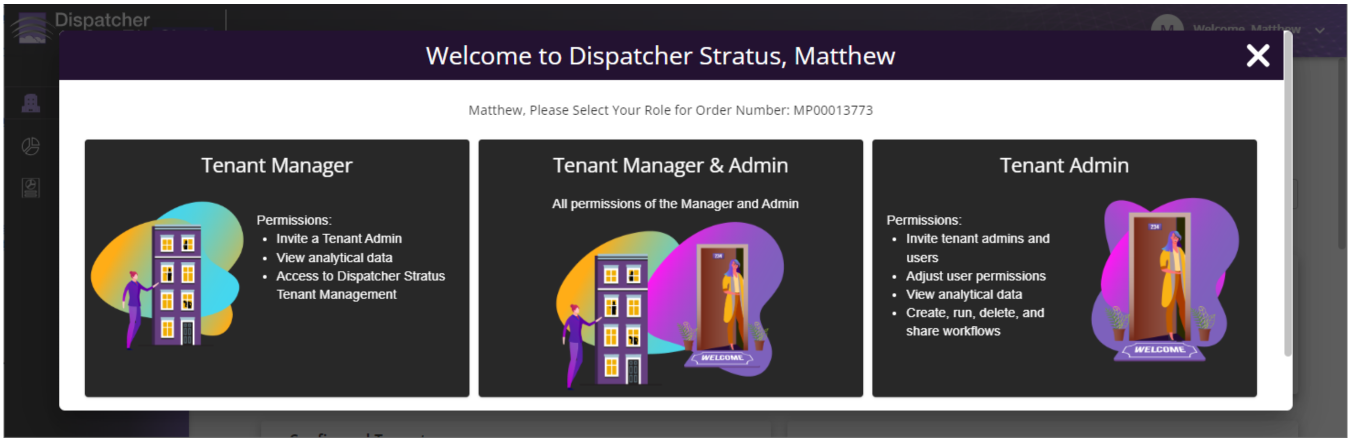
- Login URL
- Token URL
- Client ID
- Client Secret - The client secret is hidden by default. To unhide the secret, select the Eye icon.

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 Stratus 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**
- **Custom role**

Use Cases for Single/Multi-Tenancy

Dispatcher Stratus 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:

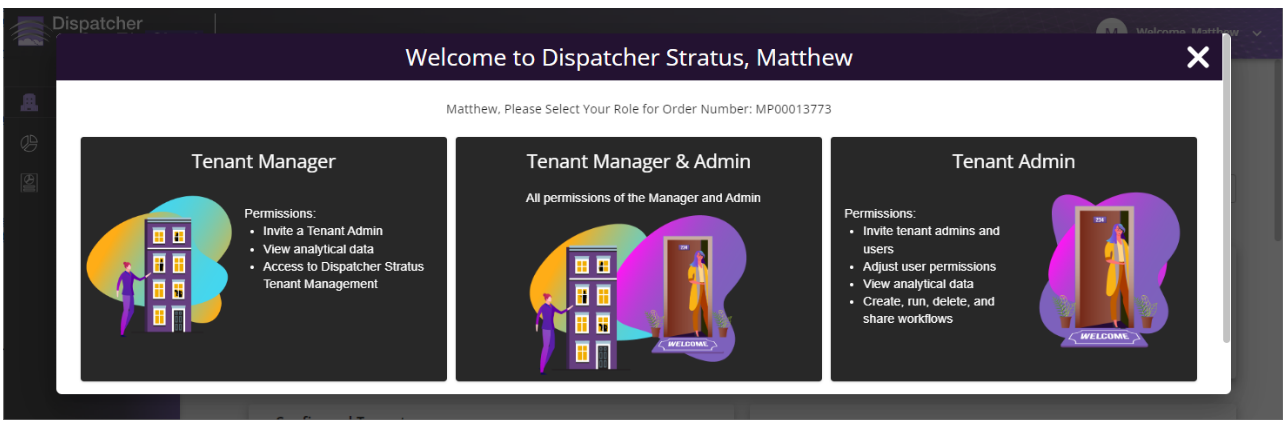
1. Navigate to the Role Selection panel. Do one of the following:

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

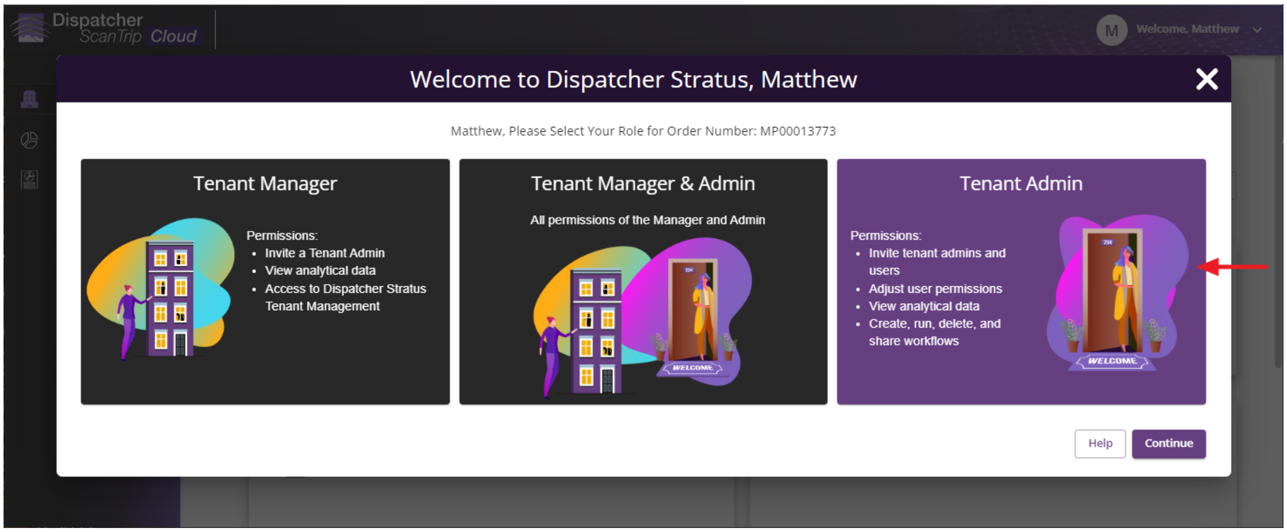
   b. Click on the link in a purchase code redemption email.

   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 Stratus , access the Tenant Management page, and configure an unconfigured tenant after a purchase code has been redeemed.



2. Select the Tenant Admin role.

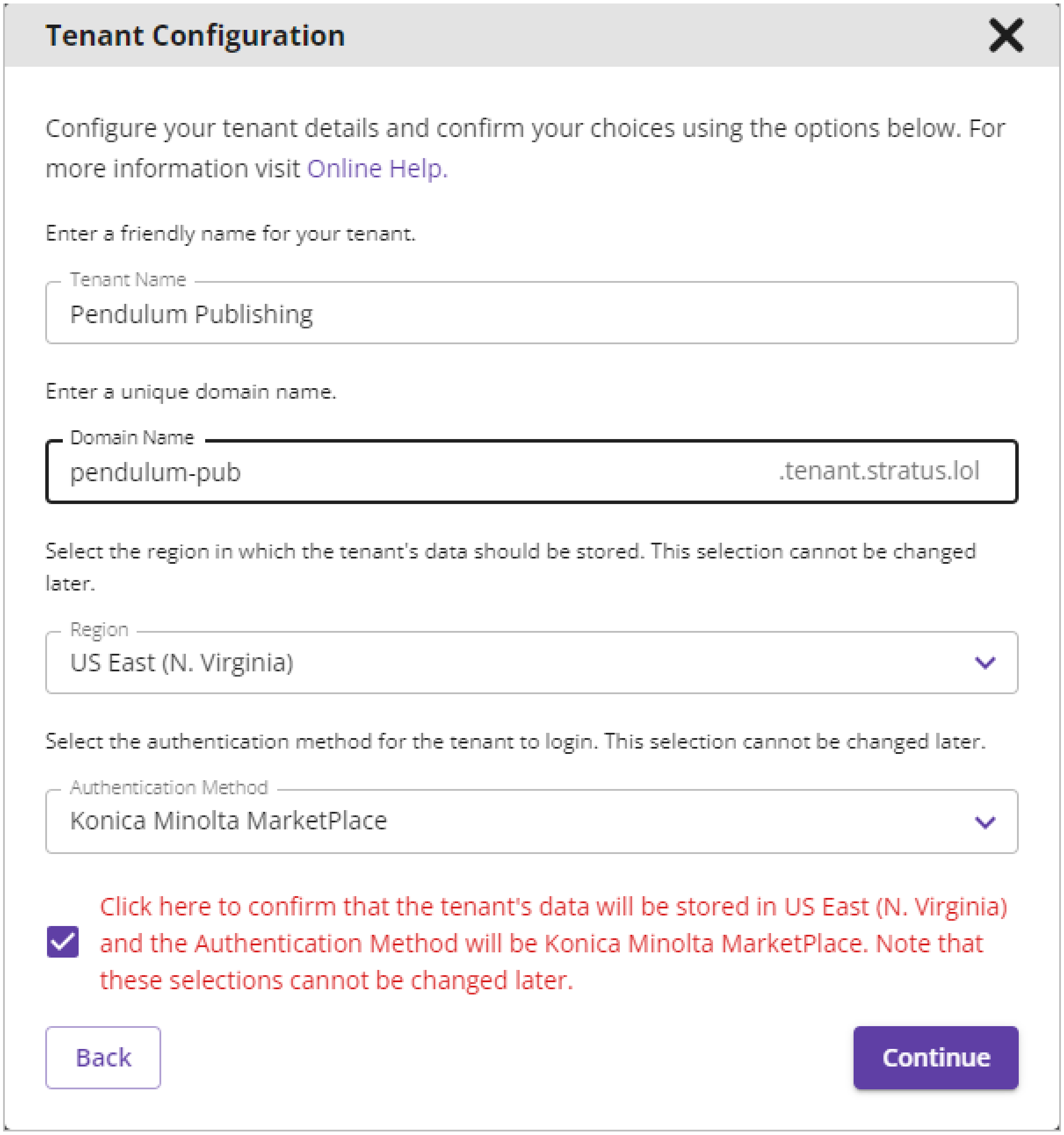


3. Enter the information required in the Tenant Configuration window:
    - **Tenant Name** - A friendly name for your tenant.
    - **Domain name** - A unique URL for your tenant.
    - **Region** - The region in which to store tenant data.
    - **Authentication Method** - The method by which users 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.

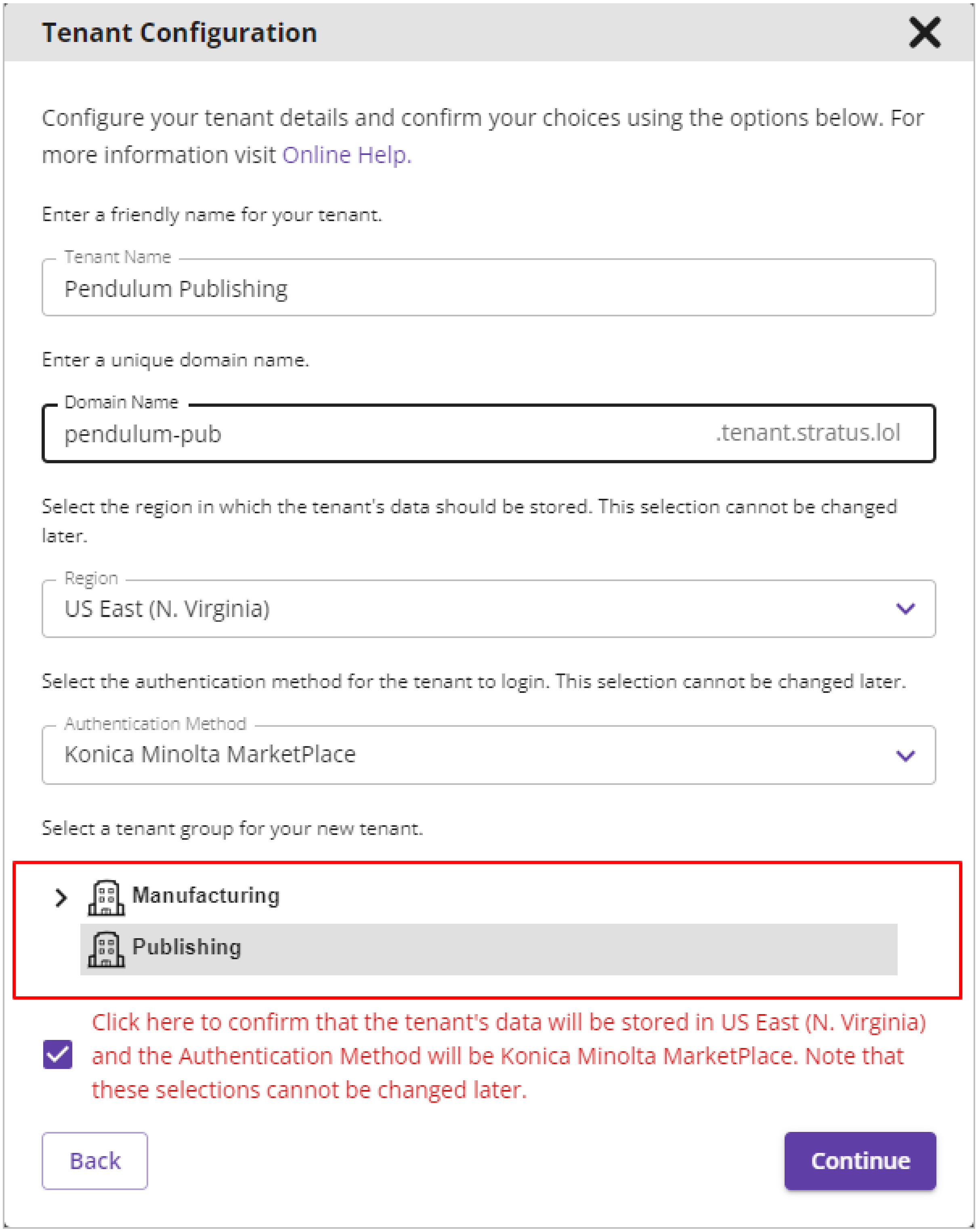
          Note: When selecting the Entra ID authentication method, you will need to provide the Metadata URL, which is provided by the Entra ID app. For more information, see the **Finalizing Tenant Setup for Entra ID Authentication** section below.

   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 Stratus . 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 Stratus tenant. However, any additional users must be added on the "Entra ID > Users and groups" page before they can login to Dispatcher Stratus .

As a Tenant Manager

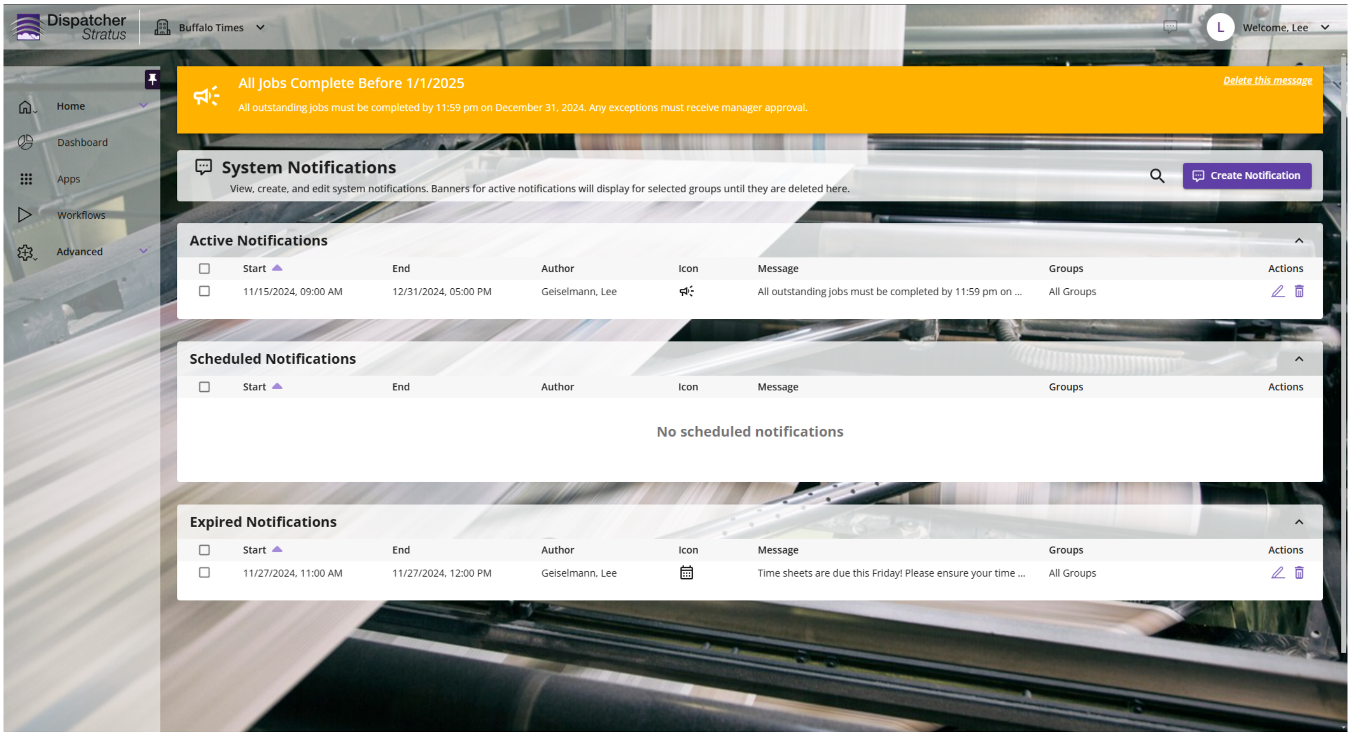
For more information about onboarding as a Tenant Manager, contact your Konica Minolta representative.

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.

System Notifications

The Notifications page allows Tenant Admins with the correct permissions to create, view, and edit notifications that can be delivered to users throughout the tenant. These notifications are displayed at the top of the tenant until they are deleted.



System Notification Display

Notifications are displayed in one of three groups:

- Active Notifications - Notifications that are currently between the selected Start Date and End Date.
- Scheduled Notifications - Notifications that have not yet reached the selected Start Date.
- Expired Notifications - Notifications that have passed their selected End Date.

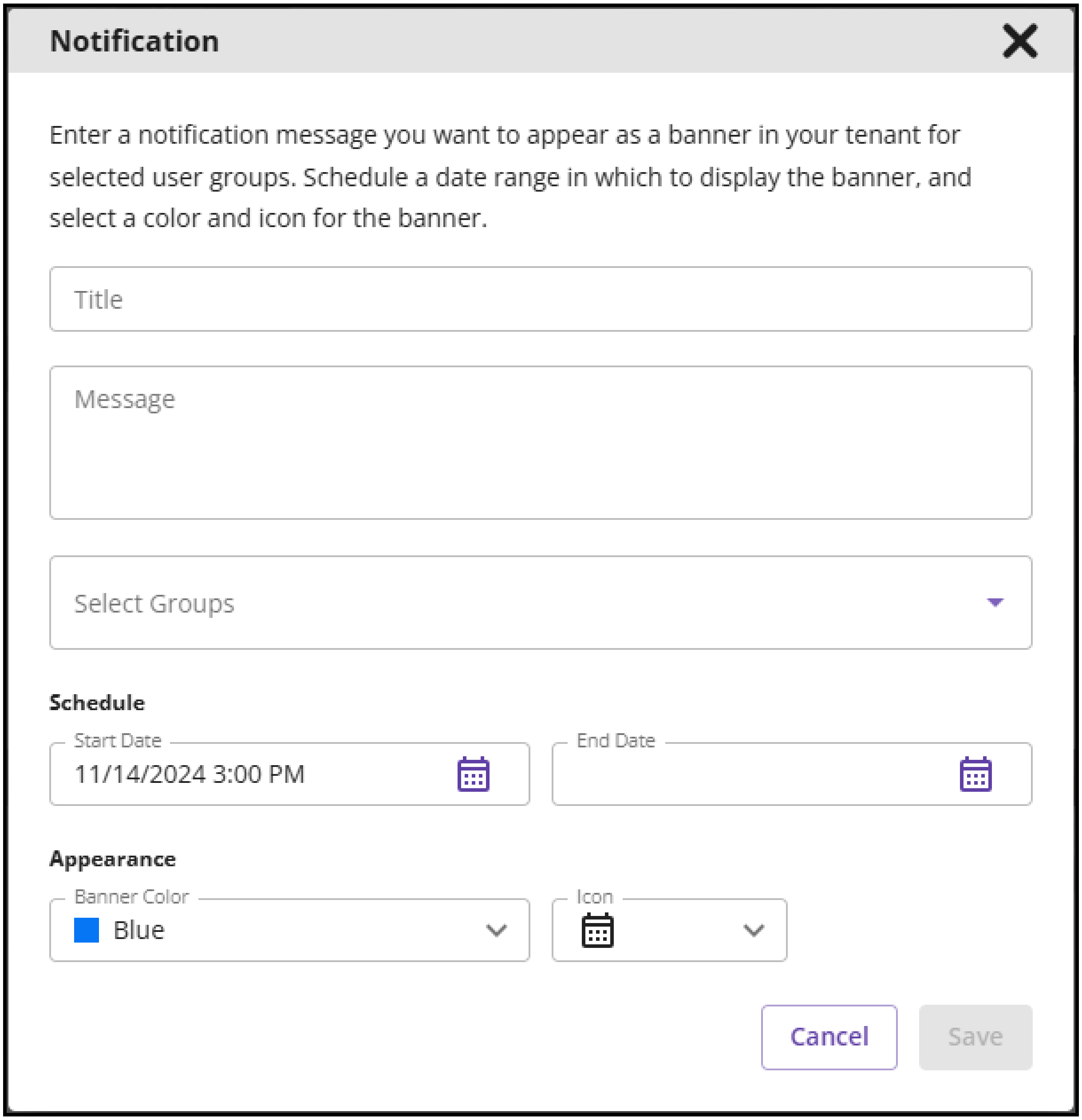
Each system notification is displayed with the following information:

- Start - The date and time the notification began displaying.
- End - The date and time the notification ceased displaying.
- Author - The user who created the notification.
- Icon - The icon selected to be displayed in the notification.
- Message - The message displayed in the notification.
- Groups - The **user groups** the notification is sent to.
- Actions
  - Edit - Update the notification.
  - Delete - Remove the notification.

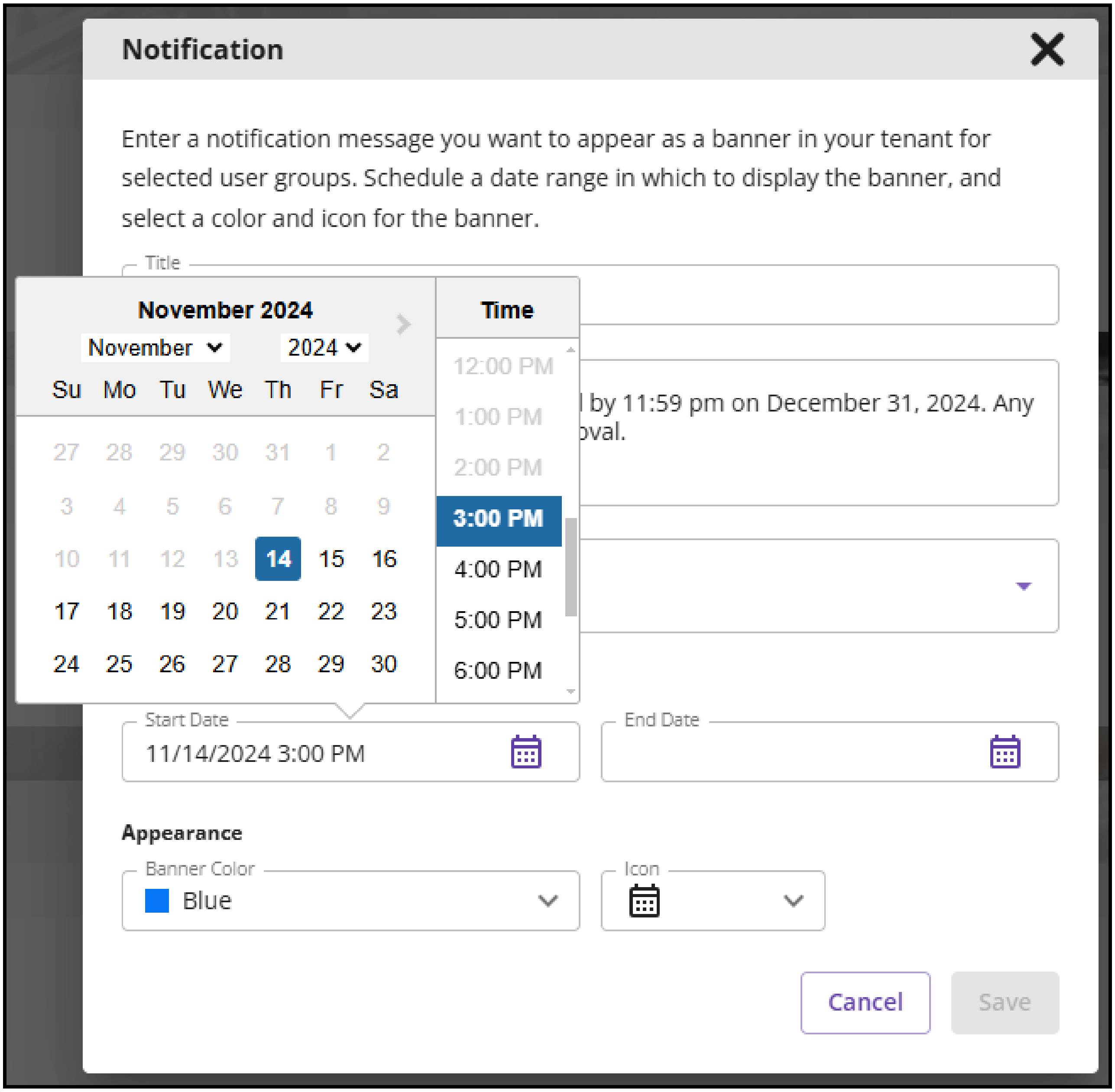
Creating a Notifications

To create a new notification, do the following:

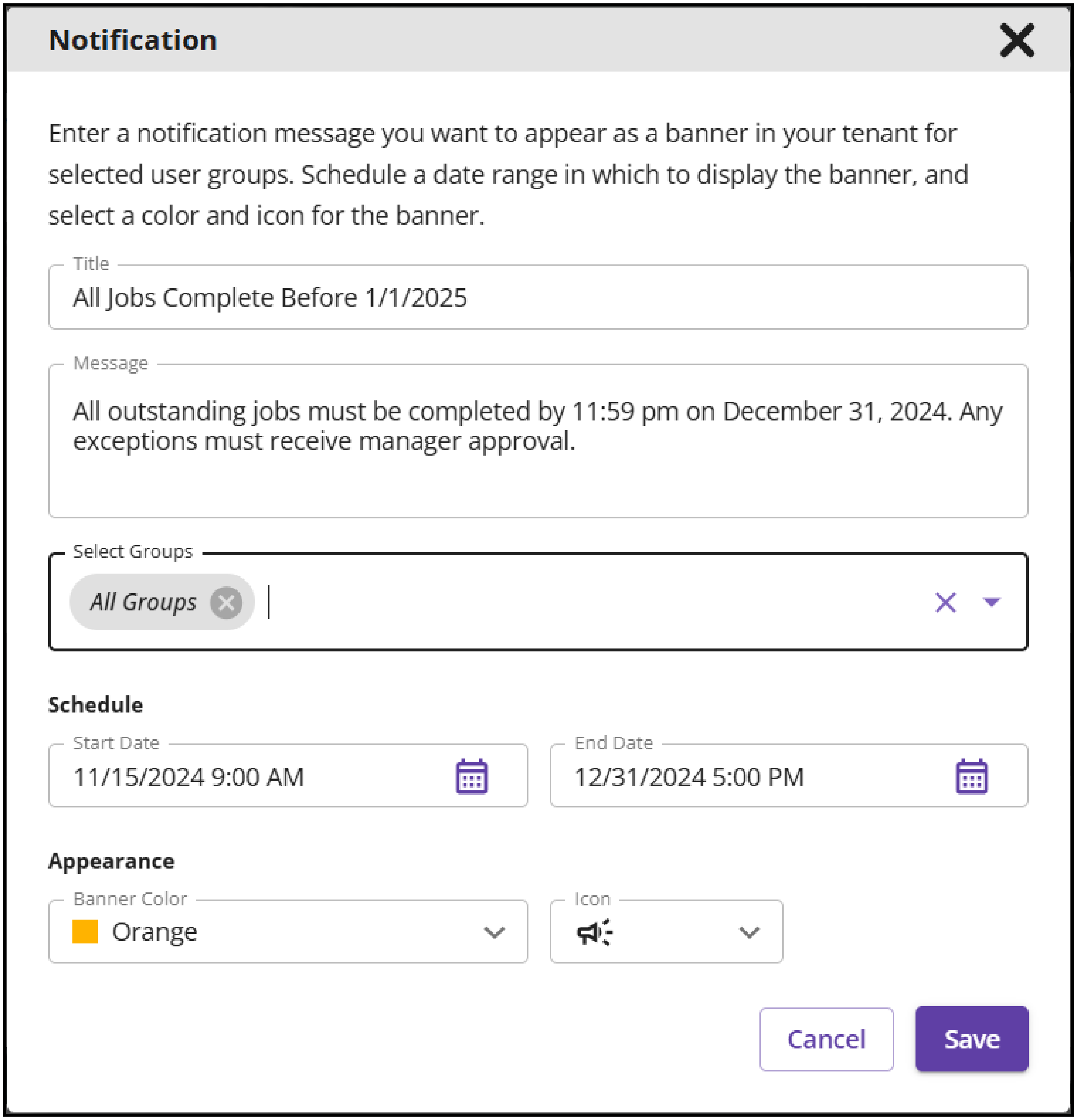
1. Select the **Create Notification** button located on the right side of the bar at the top of the screen. This will open the “Notification” window.



2. Enter a **Title** and **Message** for the notification.
3. Use the **Select Groups** drop-down menu to select the **User Groups** that should receive the notification.
4. Select a **Start Date** and **End Date** for the notification.

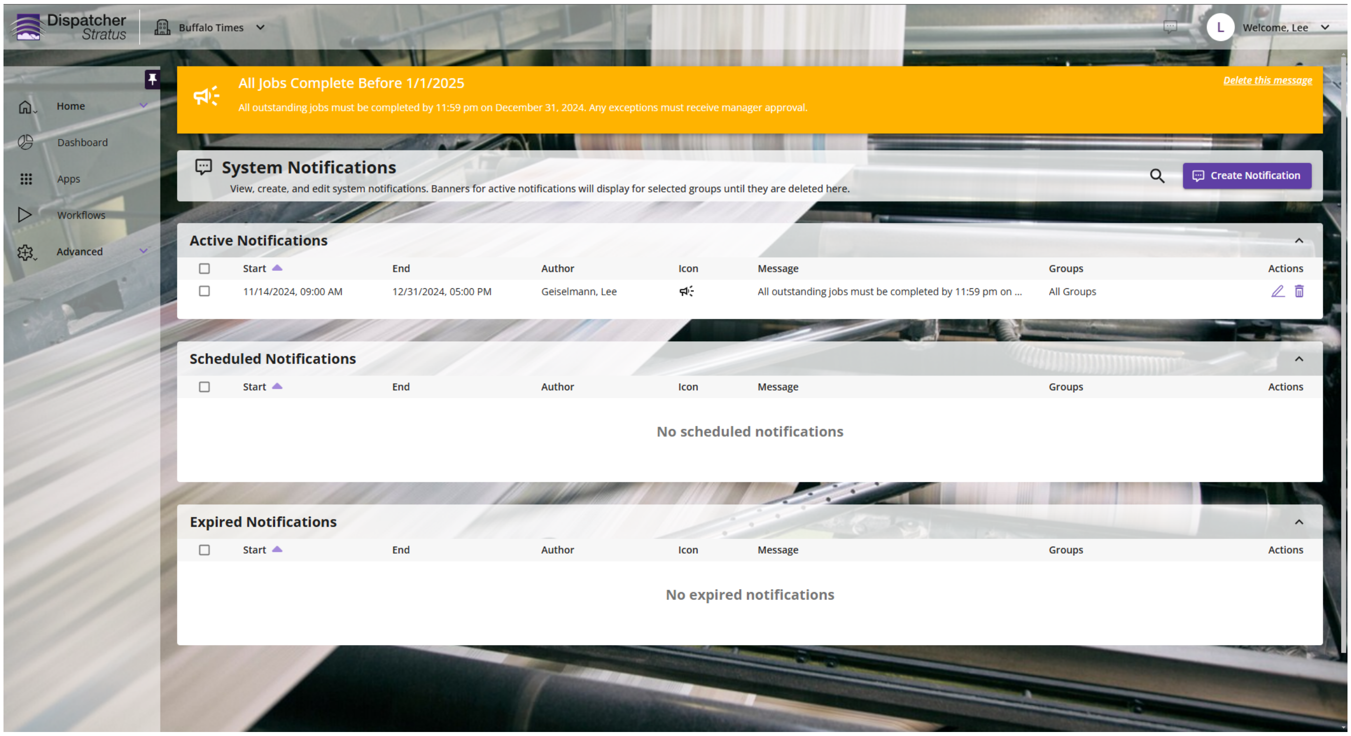


5. If you would like, you may also select the **Banner Color** and/or **Icon** that the notification will be displayed with. By default, notifications are blue and have a calendar icon.



6. Select the **Save** button.

Active notifications will appear at the top of the tenant window, as in the following illustration:



Removing a Notification

Notifications can be removed in a few different ways.

Removing a Notification Banner

To remove a notification banner, select the “Delete this message” button in the upper-right corner of the notification. This will remove the notification from the user’s tenant.

Note: If a user edits an active notification, all users will see the notification again, even if they have dismissed it.

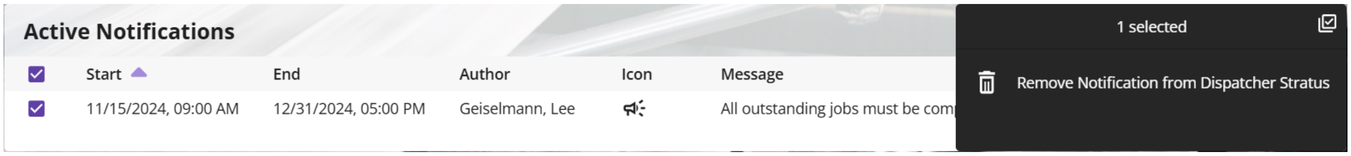
Deleting a Notification

To delete a configured notification, do the following:

1. Select the notification you would like to delete.
2. Select the trash can icon on the right.
3. Confirm your selection by selecting the **Yes** button in the window that appears.

Selection Boxes

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



- **Remove Notification from Dispatcher Stratus** - Delete all of the selected notifications.

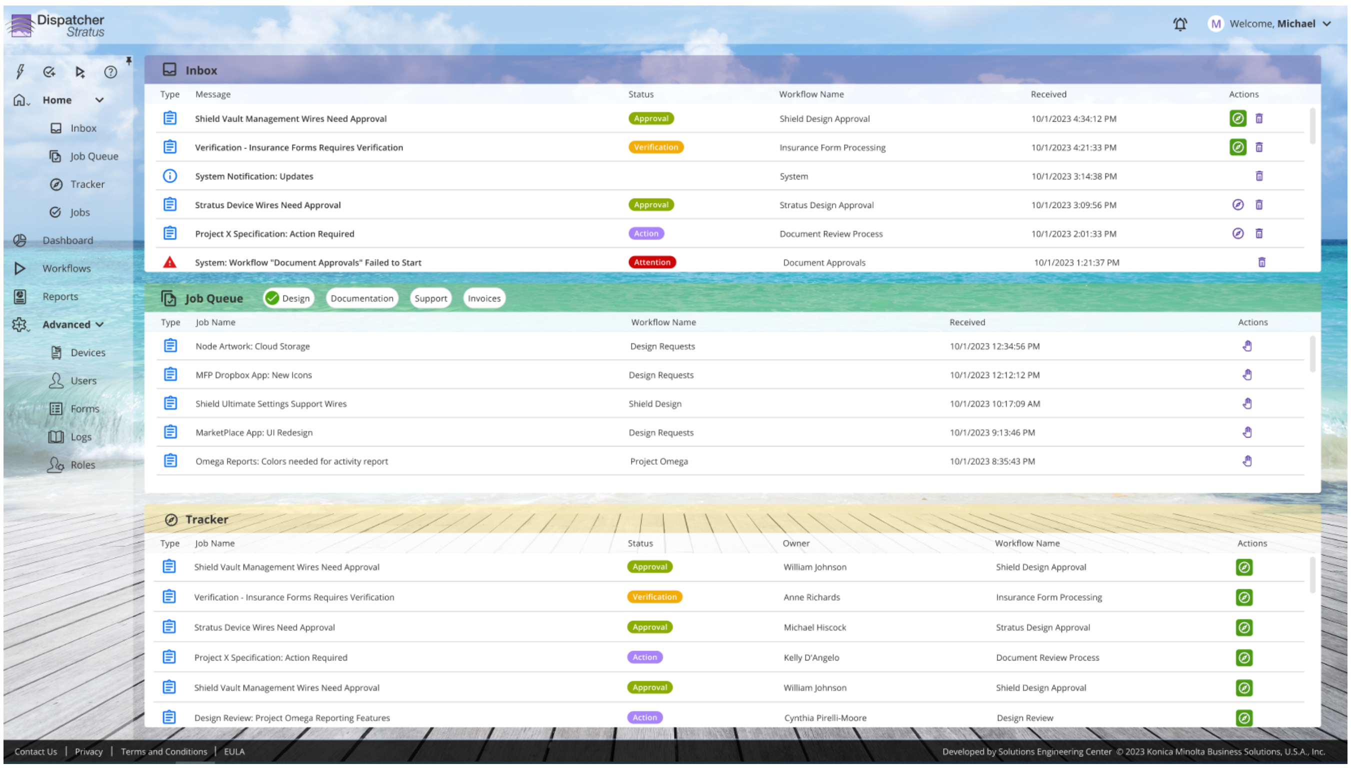
Note: The dash in the selection box on the column header row indicates only a portion of the group’s members are currently selected.

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 **Home** page.



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

Tenancies and Onboarding

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

MFP App

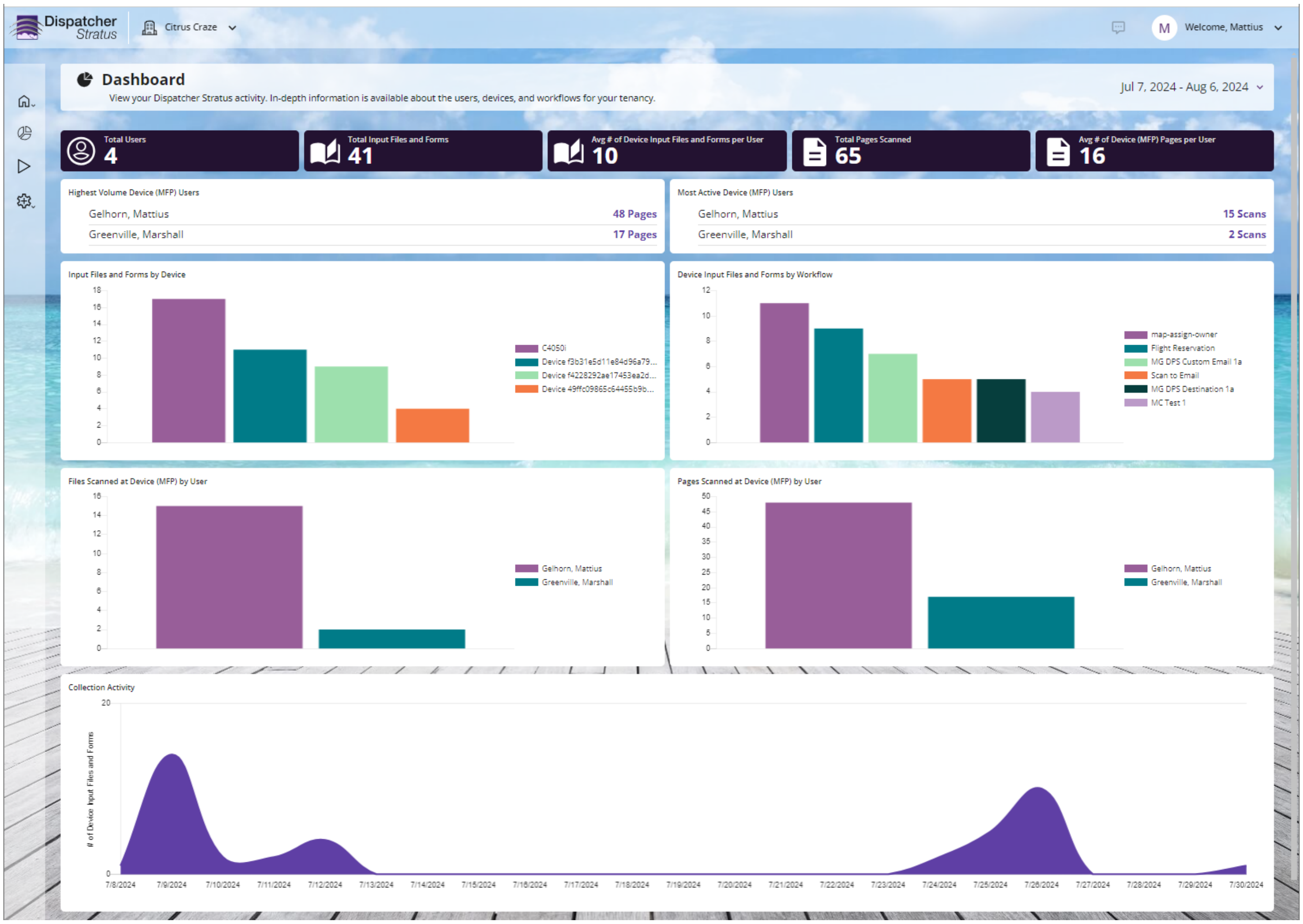
Learn more about the Dispatcher Stratus app for easy workflow access at any supported MFP.

Profile

Learn more about the user information stored by Dispatcher Stratus.

Dashboard

The Admin Dashboard provides a variety of tenant information at a glance, including user, device, and workflow activity. **Privileged tenant members**, as well as tenant admins, can access their tenant's Admin Dashboard by selecting **Dashboard** from the Navigation pane.

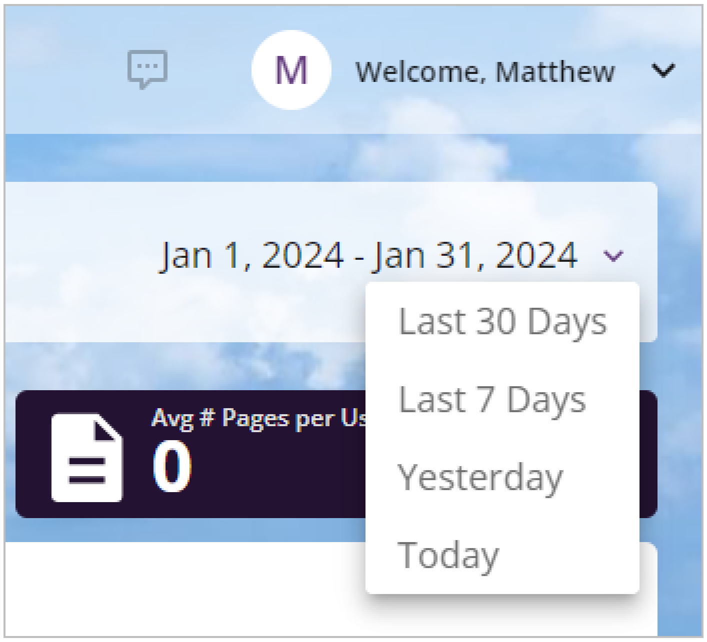


Notes:

- 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.

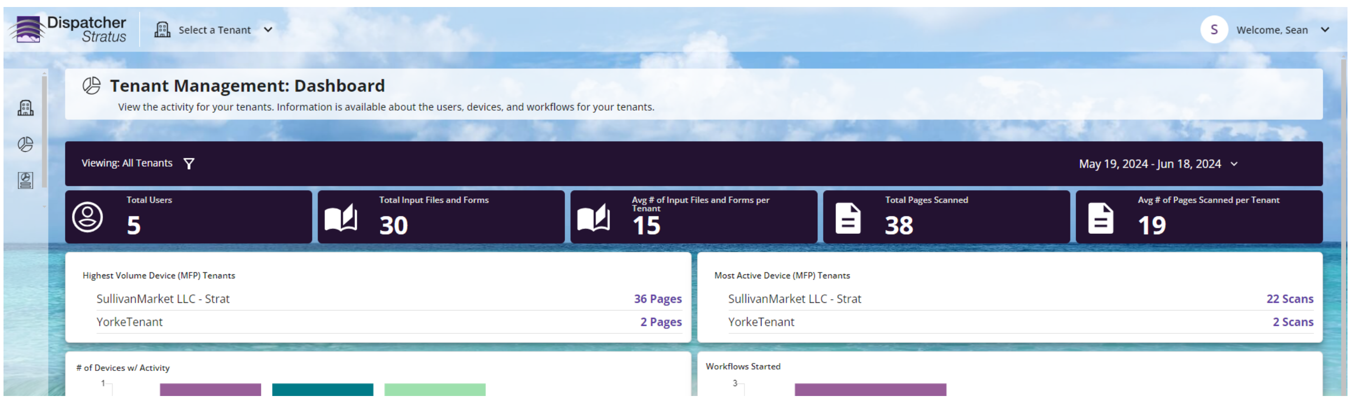
- Input Files and Forms by Device - Ranks your devices by the number of documents scanned.
- Device Input Files and Forms by Workflow - Ranks your workflows by the number of documents processed.
- Files Scanned at Device (MFP) by User - Ranks your users by the number of documents scanned at the device.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

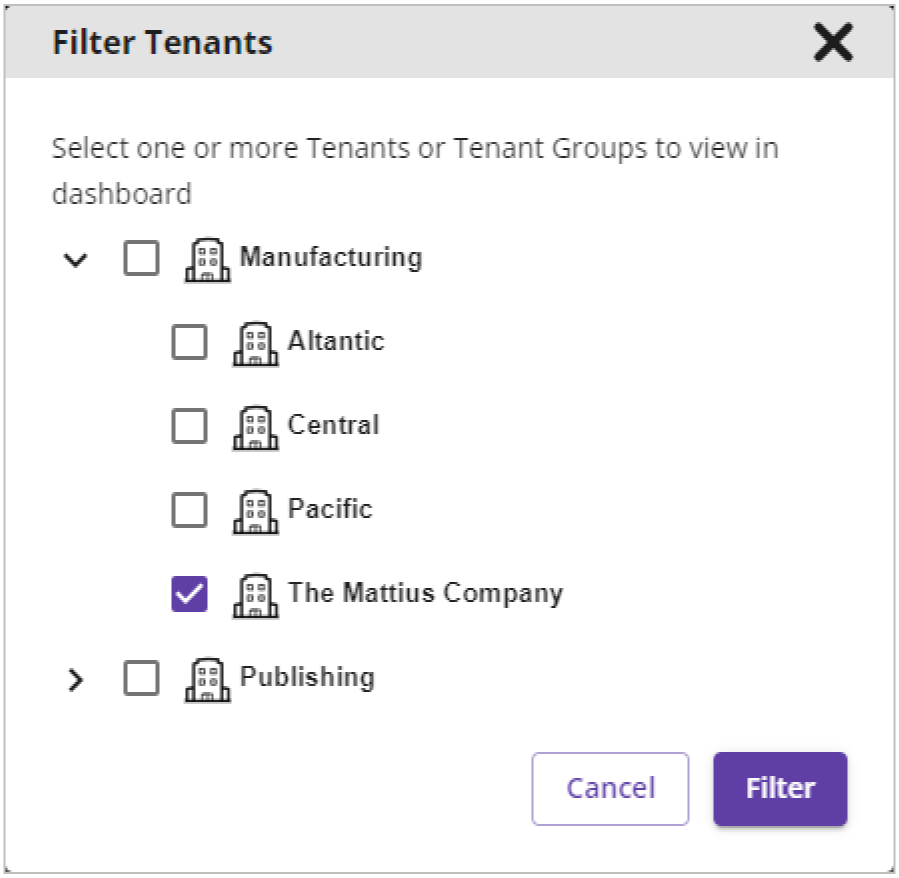
The Manager Dashboard is similar to the Admin Dashboard, with the following exceptions:

- 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

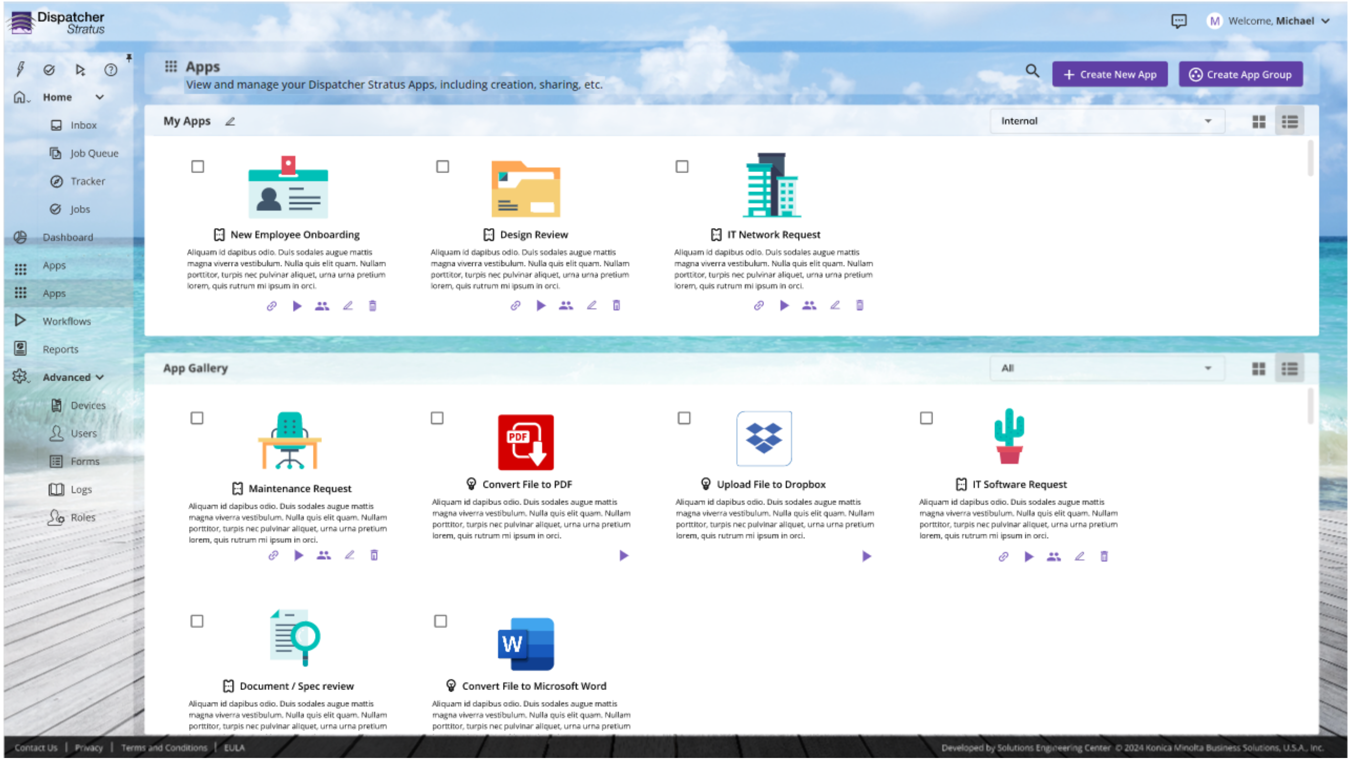
If you select the Filter icon, the Filter Tenants window appears listing a hierarchy of all the tenants you manage. Select the tenants you want to include in your dashboard data, and then select **Filter**.



Apps

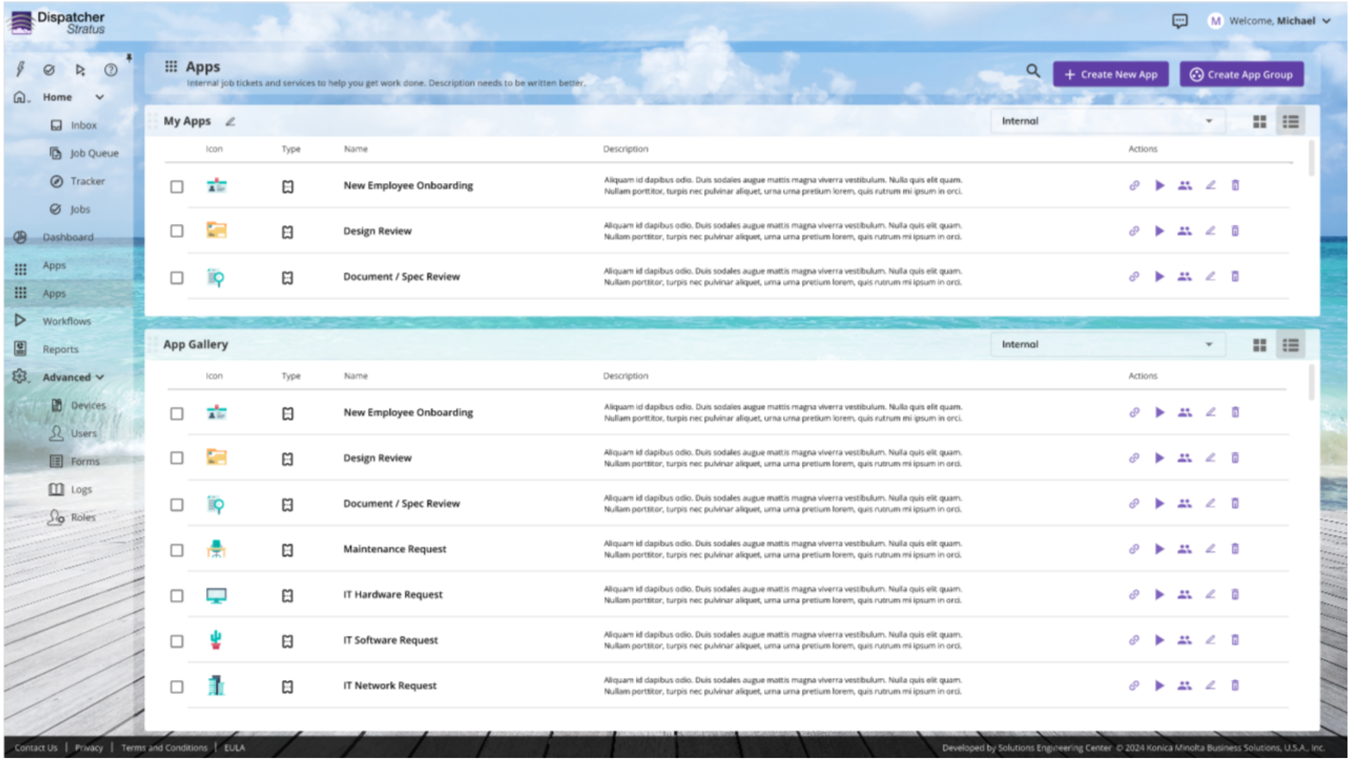
Use the Apps page to create, maintain, and run Stratus apps. Stratus apps enable tenant members to make a URL available to other members. When run, a Stratus app executes the URL defined in the app. Depending on the app type and its configuration, an app can simply open a web page. Other app types can open a form specified in a Stratus workflow, enabling a user to submit form data into the workflow and create a Stratus **job** - all without actually accessing the workflow or having any detailed knowledge of it.

Creating Stratus apps requires no programming expertise, and can be completed in minutes. Once created, Stratus apps appear on the creator’s Apps page, restricted to a selected **app type**. The creator can then share the app with other tenant members. Access to the Apps page is restricted to users with one or more **Apps permissions**.



Apps Page

The Apps page lists all of the logged-on user’s Stratus apps, organized by app groups. App groups appear in separate tables, and each table view can be restricted by app type. App tables have two view options: Grid and Tabular. The above illustration shows the Grid view. The following illustration shows the Tabular view:



The following apps appear for the logged-on user:

- Apps owned by the user - An app's creator is the owner of the app.
- Apps currently shared with the user - **Sharing an app** provides the recipient with **Use permission** only.

The information bar at the top of the page provides the following options:

- Search - Restrict the apps that display to a specified text string. The restriction applies to all app groups.
- Create New App - Accesses the **Create New App window**.
- Create App Group - Accesses the **Create App Group window**.

App Groups

You can create app groups in which to organize your apps. The **My Apps** group is the default group. You cannot delete this group, and all new apps are added to this group. Once you create your own app groups, you can move apps from the default group into any other group.

App Group Tables

Each app group appears on the Apps page in the form of a table containing all the apps in the group. Each table provides the following information about its apps:

- Icon - If the app creator specified an icon image during app creation, it appears here. Otherwise, Dispatcher Stratus displays a default app icon based on the app type. Note that for workflow apps, if the app was **auto-created**, the app uses the node icon (if any) specified in the associated workflow.
- Type - An icon representing the **app type** displays.
- Name - The user-defined app name displays.
- Description - The user-defined app description displays.
- Actions - Icons for the **actions** available for the app display.

Each table provides the following configuration options:

- Table header bar
    - Group name - Appears on the left of the bar. To edit the group name:
        - Select the Pen icon next to the name.
        - Modify the name in the field that appears.
        - Select [Enter].
    - App Type filter - Use this dropdown field to restrict the display of an app group table to a selected app type, or you can display all app types.
    - View - Each table provides a Grid view and a Tabular view.

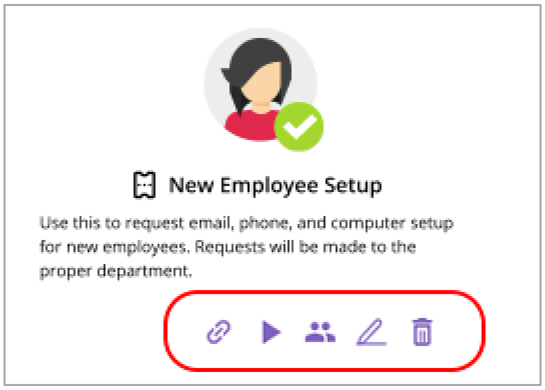
Create New App Group

To create a new app group, do the following:

1. On the Apps page, select **Create App Group**. The Create New App Group window appears.
2. Specify a name for the group.
3. Select **OK**. You return to the Apps page, where the new group is added to the bottom of the page.

App Actions

For each app on the Apps page, one or more action icons appear, depending on the app's type and the user's permissions in the tenant. The following illustration shows the actions available for an **Internal app** for a user with full **Apps permissions**.



The following table describes the Action icons:

Icon	Name	Description
	Paper Clip	Copies the app URL to the clipboard.
	Play	Launches the app. For Internal apps, the form opens within the Dispatcher Stratus environment. For External and Generic apps, the form opens outside of Stratus.
	Share	Accesses the Share Apps window, where the app can be shared with users and user groups.
	Pen	Accesses the Edit App window.
	Trash	Deletes the app.

Launching an App

You can launch an app in either of the following ways:

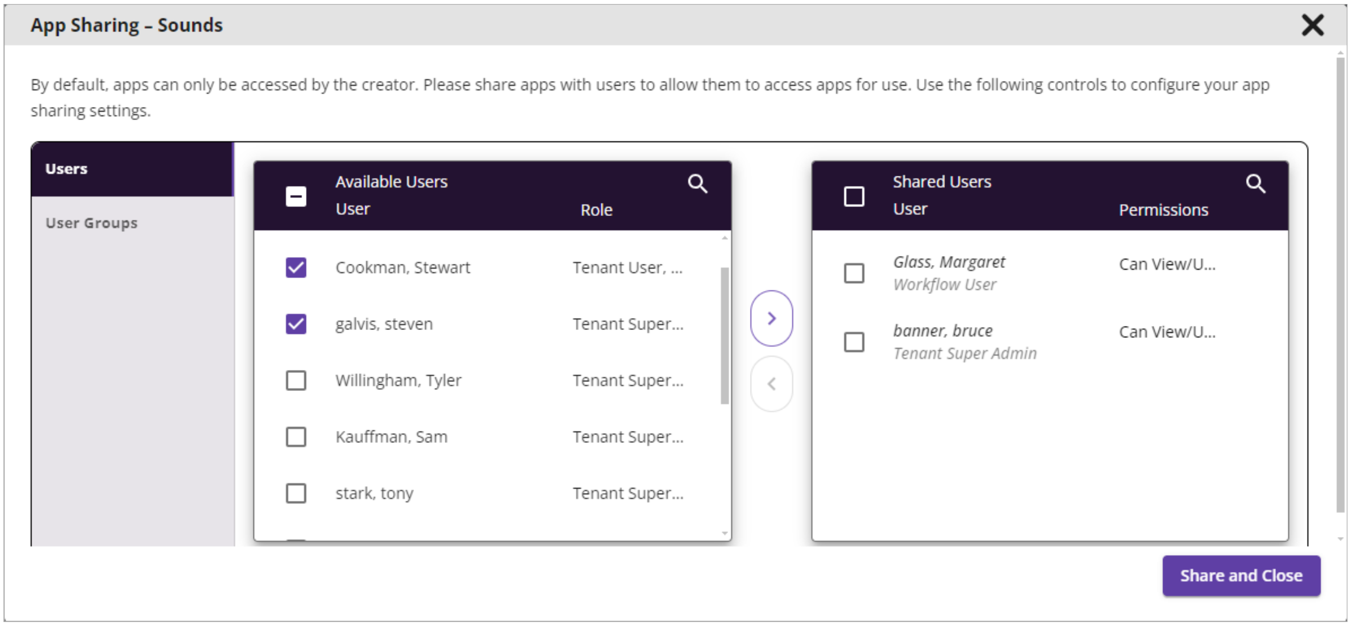
- Select the app's **Play** button on the Apps page.
- Select the app's **Copy Link** button, then paste the link into a browser window.

To launch an app, note the following:

- If an app does not appear on a user's Apps page, the app has not been shared with the user.
- If an **app type** does not appear for an app on the Apps page, the user does not have **Use permission** for the app type.

Sharing an App

Stratus Apps are initially available only to their creator. To share apps with other tenant members, use the Share App feature:



Notes:

- Apps can be shared only within the tenant.
- Sharing an app gives the recipient View/Use access only.

To share an app, do the following:

1. On the Apps page, select the Sharing icon associated with the app you want to share. The Share App window appears.
2. In the left panel, select either Users or User Groups. The Available Users and Shared Users panels populate accordingly.
3. In the Available panel, select the users with whom you want to share the app.
4. Select the right-facing chevron. The Shared Users panel populates with your selections. Use the left-facing chevron to return any selections to the Available panel, if desired.
5. When the Shared Users panel includes your desired selections, select **Share and Close**. The app will now appear on the Apps page for the selected users, with View/Use access.

Creating Stratus Apps

Stratus apps are one of the following **types**:

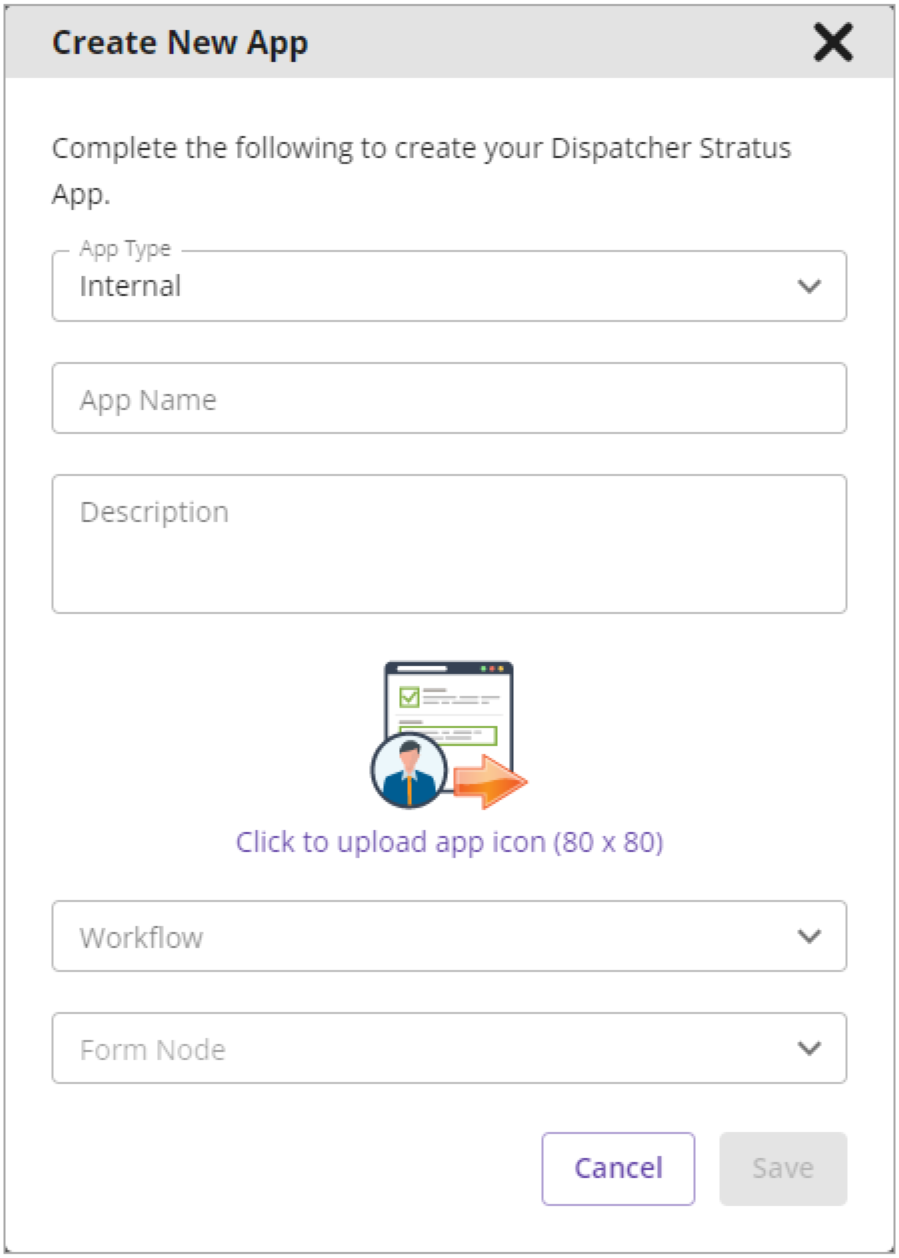
- Internal - A “workflow” app in which you specify an URL that opens a form specified in an Internal Form node in a Stratus workflow.
- External - A “workflow” app in which you specify an URL that opens a form specified in an External Form node in a Stratus workflow.

- Generic - A simple app in which you specify an URL for any destination you want to make available to other tenant members.

Note: You can also create a Stratus app automatically via the **Create App on Save** field in the **Internal Form** and **External Form** nodes.

To create a Stratus app, do the following:

1. On the Apps page, select **Create New App**. The Create New App window appears:



2. At the **App Type** field, select an **app type** from the dropdown list. The fields in the window update based on your selection.

3. In the next three fields, enter “identifying” information about the app:

- App Name - A text field in which to name the app.
- Description - A text field in which to enter a description of the app.
- Upload App Icon - A field in which to upload an image to serve as the app’s icon. If you don’t upload an app icon, Dispatcher Stratus applies a default app icon based on the selected app type.

4. The remaining fields vary based on your selection at the App Type field:
    - Internal
        - Workflow - The dropdown lists the workflows to which you have access. Select the workflow containing the form you want the app to open.
        - Form Node - The dropdown lists the Internal Form nodes in the selected workflow. Select the node containing the form you want the app to open. If the selected workflow contains no Internal Form nodes, you cannot select a form node and you cannot save the app.
    - External
        - Workflow - The dropdown lists the workflows to which you have access. Select the workflow containing the form you want the app to open.
        - Form Node - The dropdown lists the External Form nodes in the selected workflow. Select the node containing the form you want the app to open. If the selected workflow contains no External Form nodes, you cannot select a form node and you cannot save the app.
        - URL for Access:
            - Stratus Node URL - To make the form available via a URL generated by the form node, select this option.
            - URL where form is embedded - To make the form available on a third-party site, select this option and specify the URL.
    - Generic URL
        - URL - Specify the URL of the page you want the app to display.

App Types

When you create an app, you first define the app type. The app type determines the app’s functionality and its configuration options in the Create New App window. App types include:

Icon	Name	Description
	Internal	Use with the Internal Form input node in a selected workflow.
	External	Use with the External Form input node in a selected workflow.
	Generic	Links to any web page; no workflow associated.

Note: You can restrict the Apps page to only a selected app type, or display all app types, via a dropdown menu on the header bar.

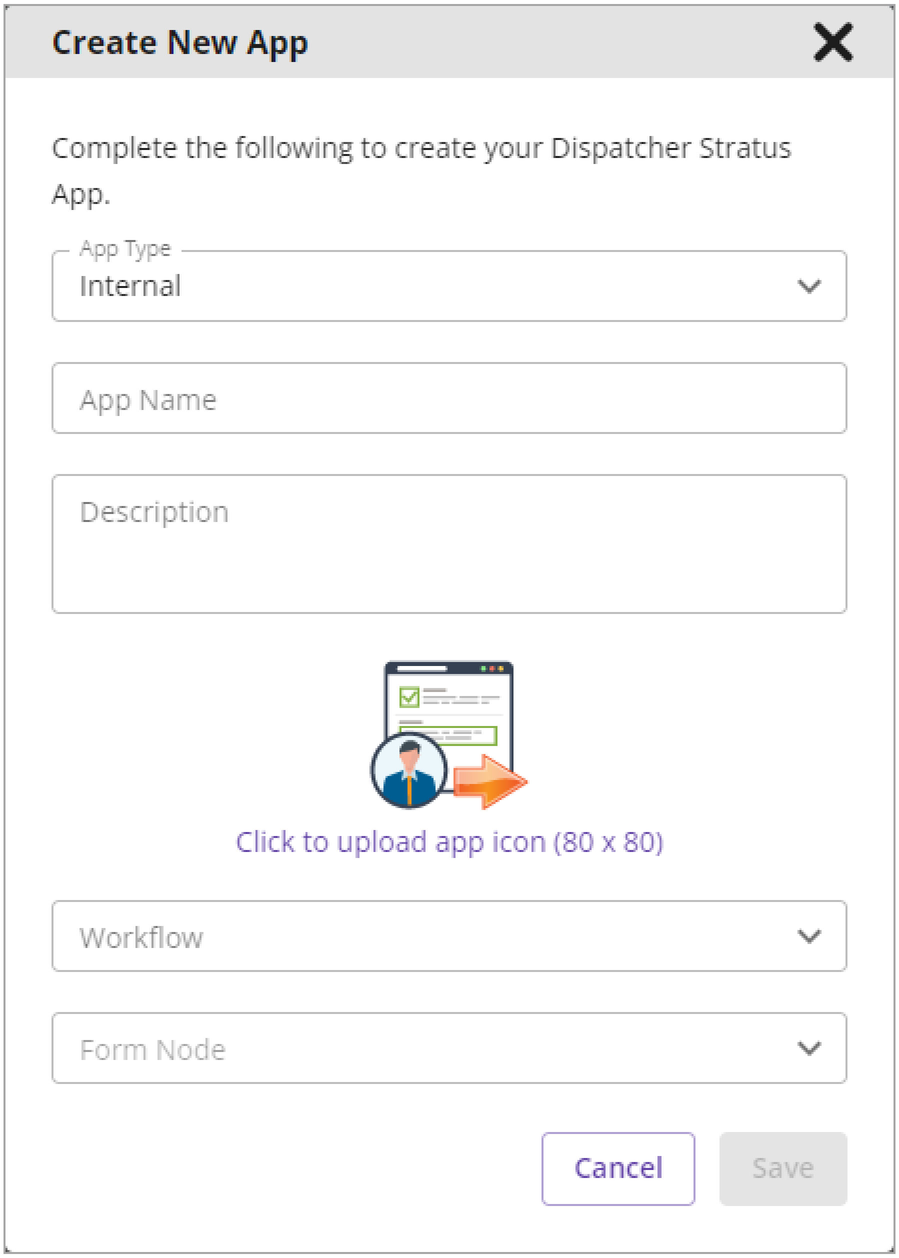
Stratus apps belong to one of the following general categories:

- Generic - These apps can contain any valid URL, for example, a company website or third-party page such as Weather.com. Running the app simply opens the link destination.
- Workflow - These apps enable a user to input form data into a workflow from outside the workflow. Running the app executes a link that opens the form defined in the workflow's input node. The link destination opens outside of the workflow, so the user does not need to run the workflow or have access to it in order to edit and submit the form. The information from the form is then fed back into the workflow. Workflow apps are of two types:
    - Internal - Points to an Internal Form node within a selected workflow. Internal apps:
        - Use a URL generated by Dispatcher Stratus (via the Internal Form node).
        - Open the form within the Dispatcher Stratus environment (that is, "internally").
    - External - Points to an External Form node within a selected workflow. External apps:
        - Provide the option use either a custom URL (Page URL) or the URL generated by Dispatcher Stratus via the External Form node (Node URL).
        - Enable you to make the form available outside of the Stratus environment (that is, "externally") if you select the Page URL option.

Internal Apps

Internal apps are workflow apps that you associate with a Stratus workflow in order to make a Stratus form within the workflow available outside the workflow, for example for users who do not have access to the workflow. Dispatcher Stratus generates the URL in the Internal Form node contained in the workflow you selected when creating the app.

Running the app executes a URL that opens the form defined in the workflow's Internal Form node. The URL opens a web page outside of the workflow, but within the Dispatcher Stratus environment (internal), so the user does not need to run the workflow or have access to it in order to edit and submit the form. The information from the form is then fed back into the workflow, creating a Stratus job.



Once you specify the app’s **identifying information**, do the following:

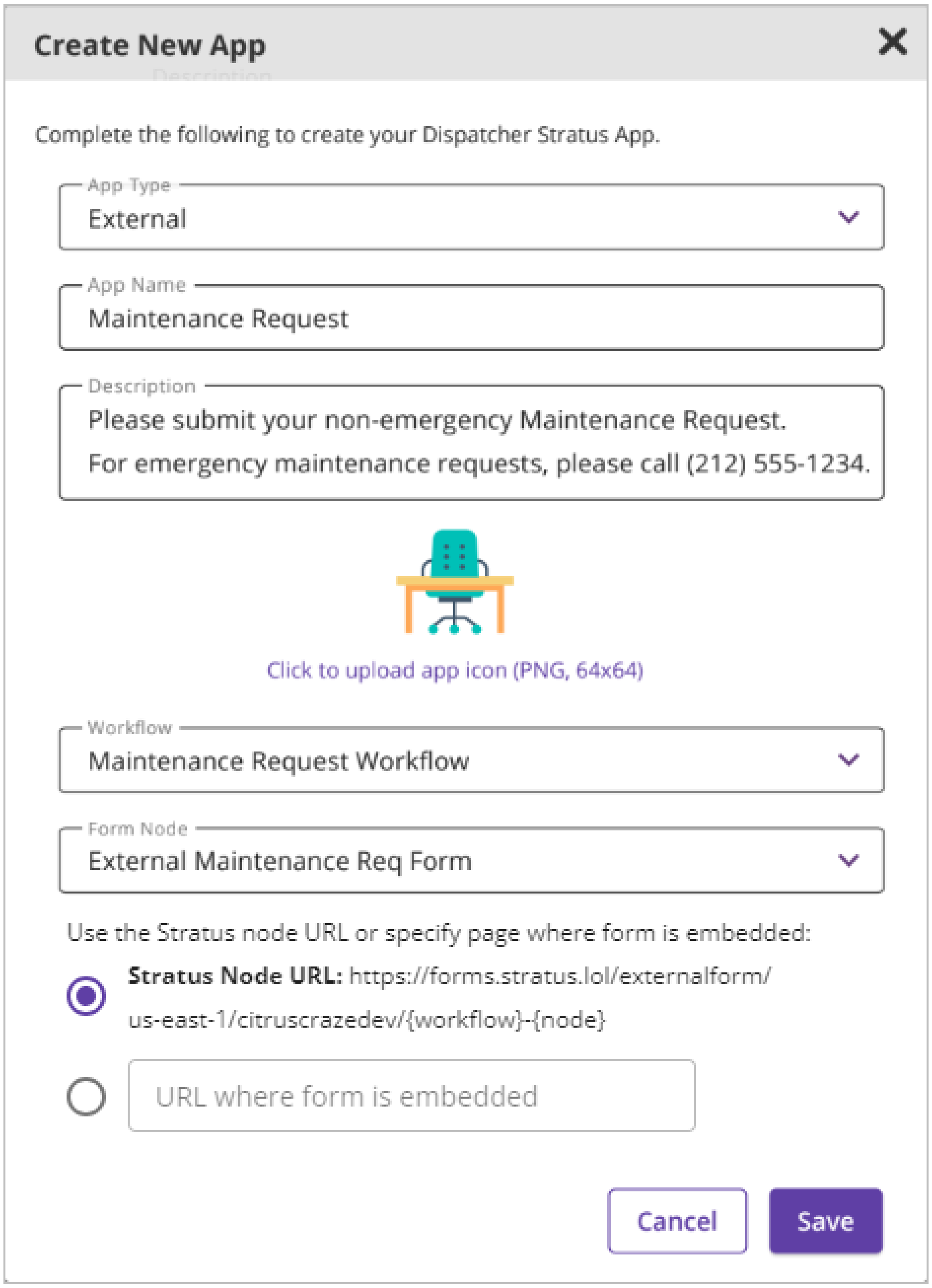
1. At the **Workflow** field, the dropdown lists the workflows to which you have access. Select a workflow containing an Internal Form node. The node should contain the form you want your app to open.

2. At the **Form Node** field, the dropdown lists the Internal Form nodes in the selected workflow. Select the Internal Form node containing the form you want your app to open. If the selected workflow contains no Internal Form nodes, no selection options are available at this field.

External Apps

External apps are similar to Internal apps, with the following exceptions:

- They interact with an External Form node and not an Internal Form node.
- They provide the option to specify a custom URL that will open the form in a third-party site, “external” to the Dispatcher Stratus environment.



Once you specify the app’s identifying information, do the following:

1. At the **Workflow** field, the dropdown lists the workflows to which you have access. Select a workflow containing an External Form node. The node should contain the form you want your app to open.
2. At the **Form Node** field, the dropdown lists the External Form nodes in the selected workflow. Select the External Form node containing the form you want your app to open. If the selected workflow contains no External Form nodes, no selection options are available at this field.

Generic URL Apps

In addition to the app identification fields described above, the Create New App window displays the following field for Generic app types.

- URL - A user-defined URL for a third-party website.

Running a Generic app opens a user-defined link destination. Unlike workflow apps, Generic apps cannot be associated with a Stratus workflow.

Device Management

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

Devices are divided into two categories:

- MFP - Any of a wide selection of multifunction peripherals, often including print, scan, fax, and internet connection. Device licenses for MFPs are consumed whenever an MFP is registered with Dispatcher Stratus. MFP device licenses can be consumed by any MFP added by any user with the correct permissions.

- Non-MFP - Any of a wide selection of input methods that are not multifunction peripherals, including third-party content management services (CMSs), **External Forms**, etc. Device licenses are consumed whenever a unique instance of the non-MFP device is recognized. For more information on non-MFP device licenses, see the **section below**. Non-MFP licenses can only be allocated to users, where they are consumed during workflow creation.

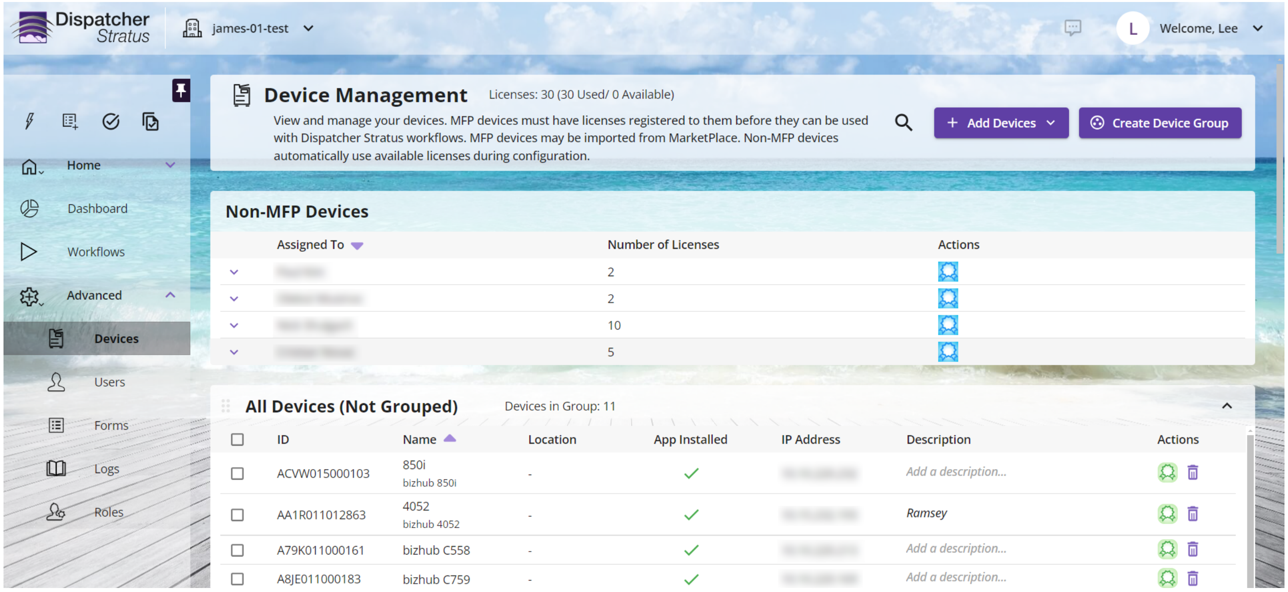
Individual Devices

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 Stratus Administrator can add new devices to the Dispatcher Stratus 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:

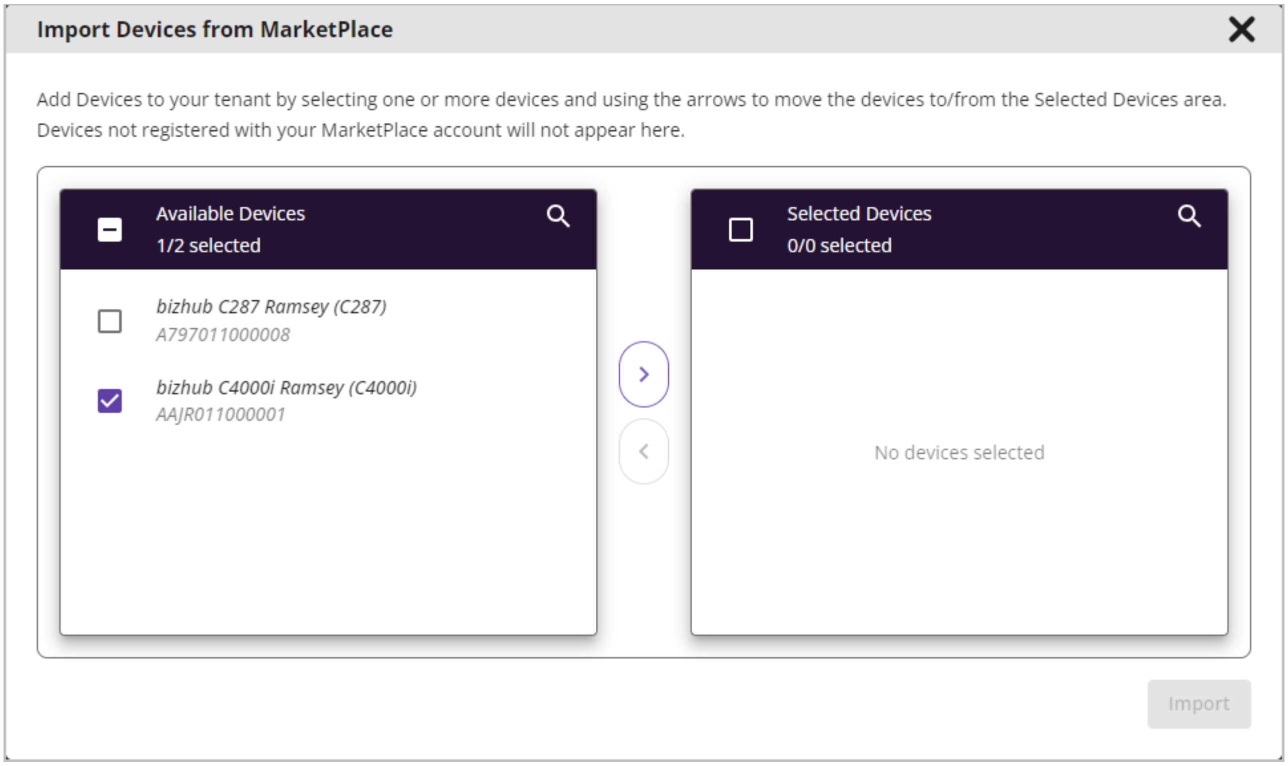
- **Import from MarketPlace**
- **Add Single Device**
- **Assign Licenses**

Note: Devices added to a tenant are visible to and usable by any Tenant Admins, Tenant Super Admins, and any users with the appropriate **custom role** permissions.

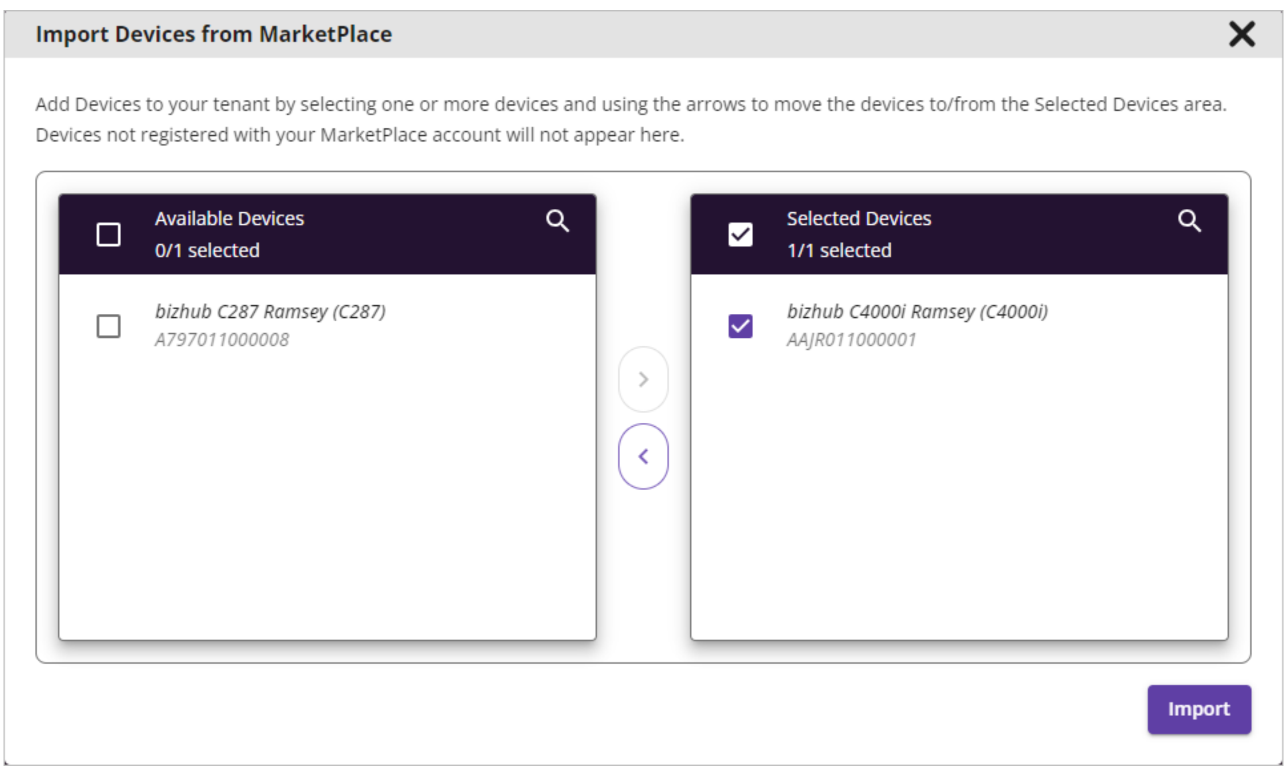
Import from MarketPlace

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:



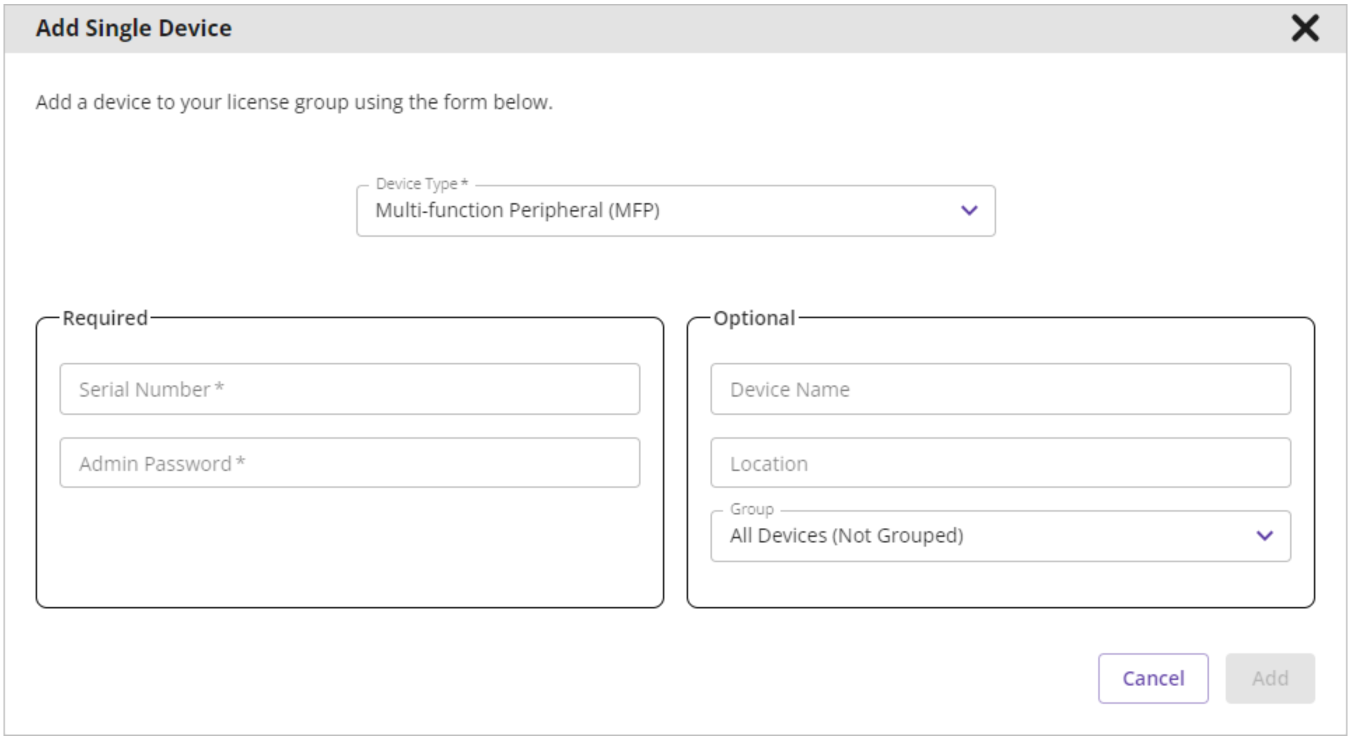
3. To import the selected devices, select **Import**. To abandon the import, select **X**.

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 Stratus 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.

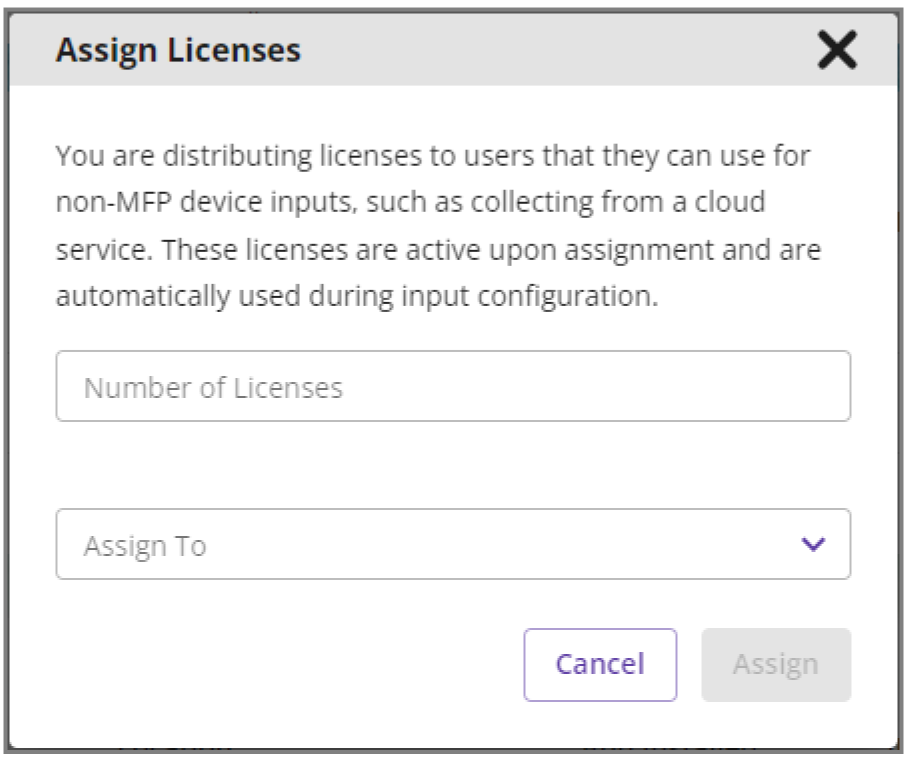
   Important!

   - 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.

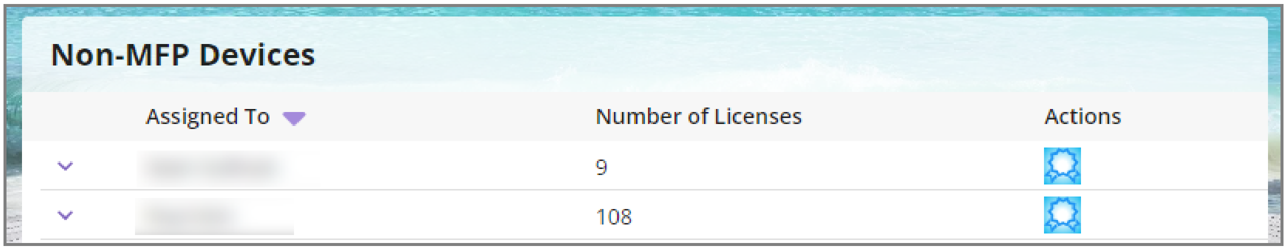
Assign Licenses

To allow your workflows to collect documents from a non-MFP device, such as [**Dropbox**](../../collection/sec.dropbox-in/) or **Dispatcher Phoenix**, do the following:

1. Select the **Assign Licenses** option from the drop-down menu. This will open a new window.



2. Enter the number of licenses you would like to assign to an individual user.
3. Using the drop-down menu, select the user who will be using these licenses.
4. Select the **Assign** button. The selected user will now have that number of licenses assigned to them.



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.

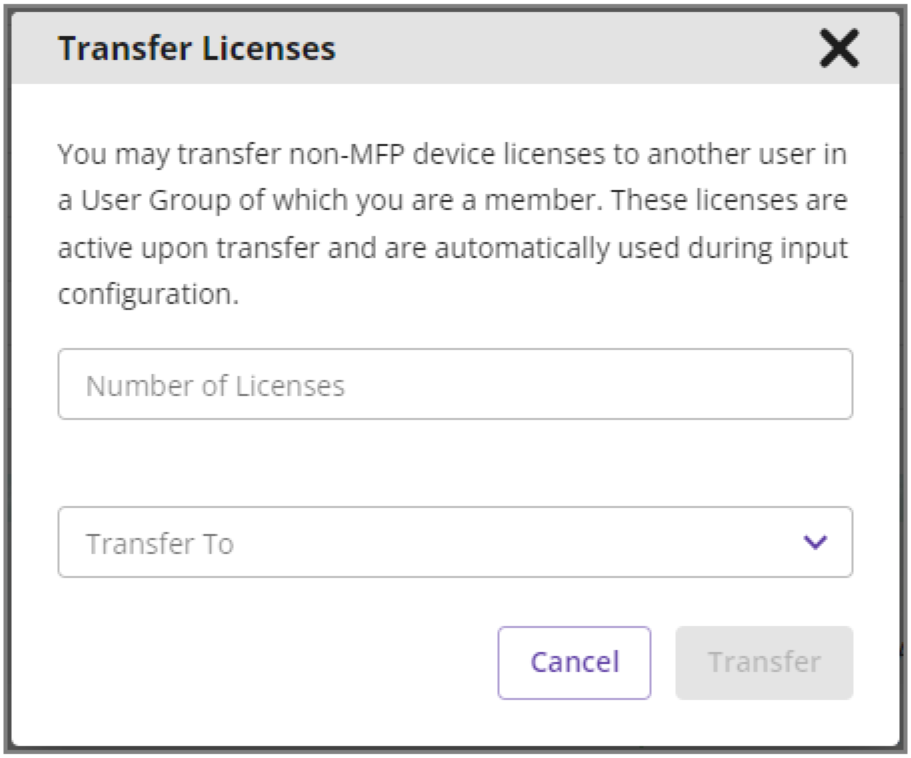
Note: The Blue icon indicates that at least one of the assigned licenses has been used. The empty icon indicates that the user has not used any of their assigned licenses.

For the **Collect from Dispatcher Phoenix** node, Dispatcher Stratus will use one license per Collect from Dispatcher Phoenix node when you save a workflow containing one or more Collect From Dispatcher Phoenix nodes.

Transfer Non-MFP Devices

After non-MFP licenses have been assigned to a user, they can transfer them to another user. Do the following:

1. Click the **Transfer** arrow in the Actions column. This will open the Transfer Licenses window.



2. Enter the number of licenses you would like to transfer.
3. Select the user you would like to receive the licenses. Note that licenses can only be transferred to other members of User Groups of which you are a member.
4. Click the **Transfer** button.

Notes:

- To transfer non-MFP device licenses, you will need at least “View” permissions for Licenses.
- To receive non-MFP device licenses, you will need at least “Create” and/or “Edit” permissions for Workflows.

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.

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 Stratus 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.

Non-MFP Devices

Non-MFP devices are displayed in their own table, with the following information:

- **Assigned To** - The user the licenses are assigned to. These users can use their allotted licenses in workflows.
- **Number of Licenses** - The number of licenses assigned to a particular user.
- **Actions**
    - **Licenses Used/Licenses Unused** - This displays whether the user has used all their assigned licenses or if they have additional licenses available.
    - **Transfer** - Clicking this button allows you to transfer any licenses that have been assigned to you to another user. For more information, see the **Transfer Non-MFP-Licenses** section above.

Additional information can be viewed by clicking on the arrow on the left-hand side of a row:

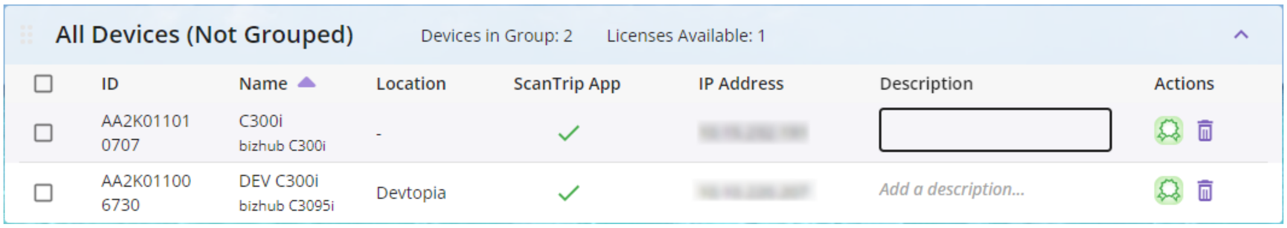
- **Node** - The node that is using one or more licenses.
- **Workflow** - The name of the workflow that is using one or more licenses. A workflow that is not shared will appear in the table with “Not Shared” as the workflow name.
- **Licenses in Use (#)** - The number of licenses being used by that workflow.

For more information on how non-MFP device licenses are used, see the **Assign Non-MFP Licenses** section above.

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 Stratus 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

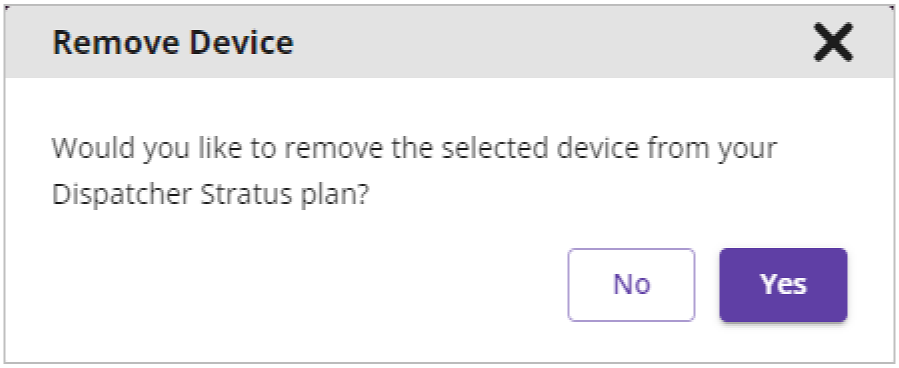
The medal icon displays in the Actions column. Its color indicates the license registration status of the device:

- 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.

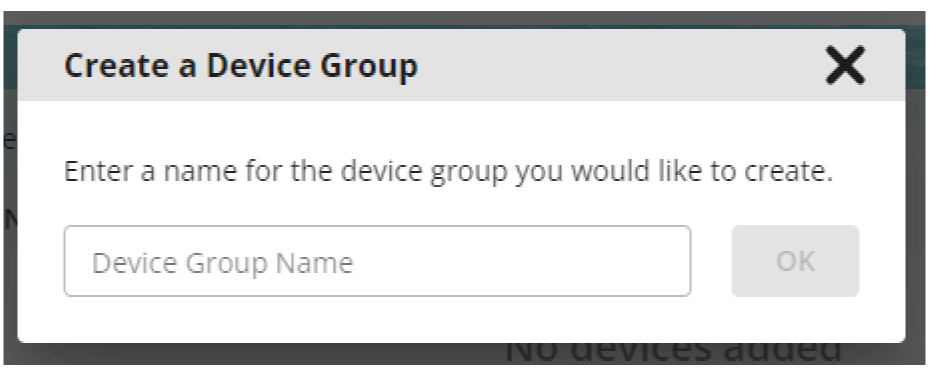
Device Groups

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**.



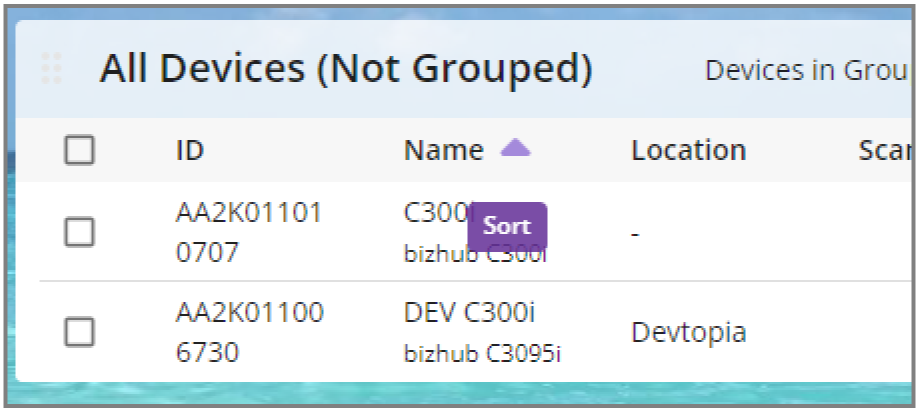
Edit a Device Group

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.



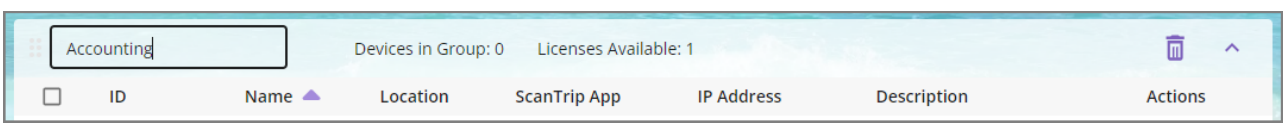
Note: Columns are automatically sorted alphanumerically.

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.

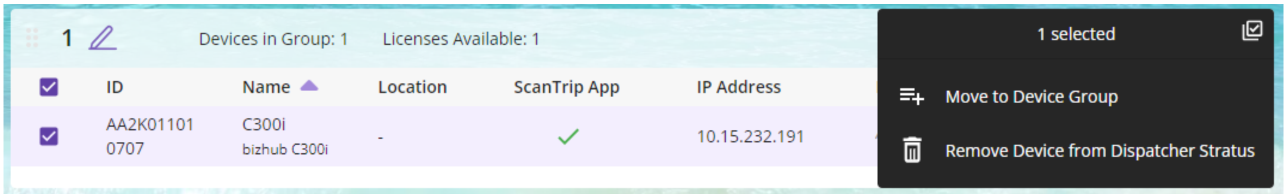


2. Type the new Device Group Name.
3. Click anywhere else on the screen. The name will be saved automatically.

Move a Device to Device Group

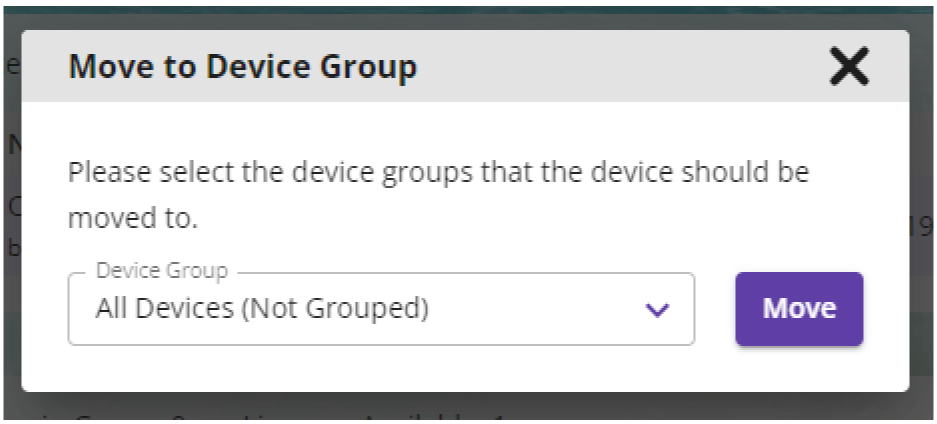
To move a device from one Device Group to another, do the following:

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.

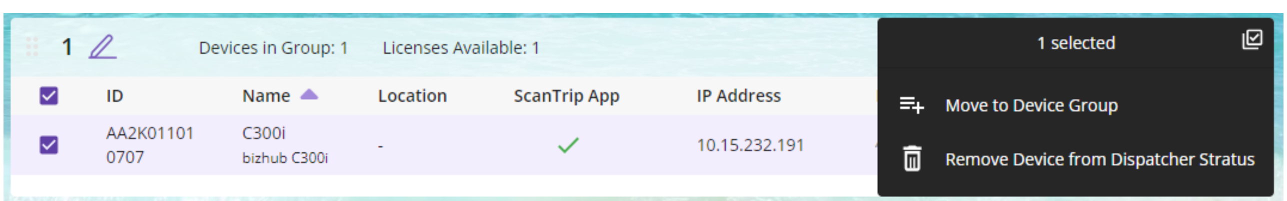


3. Click the **Move** button.

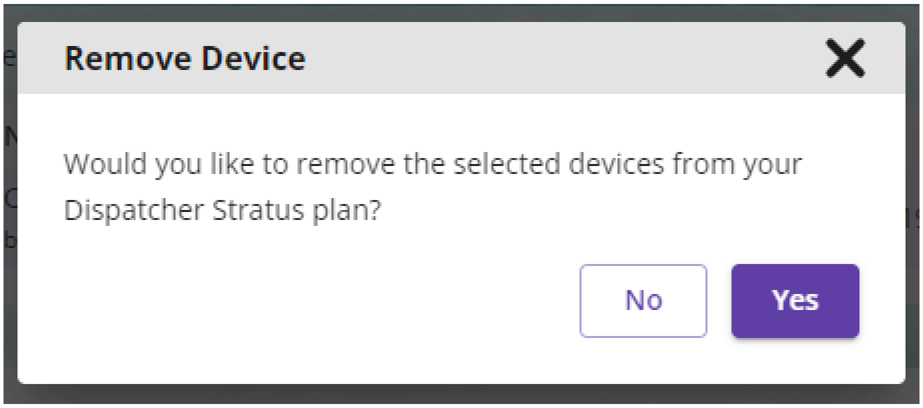
Remove a Device from a Device Group

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 Stratus** action.

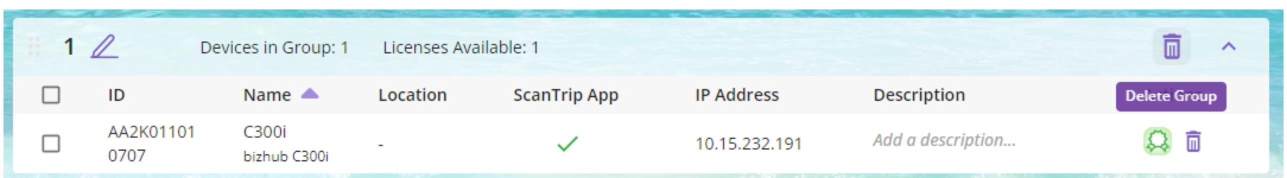


3. Click **Yes** to remove the device.

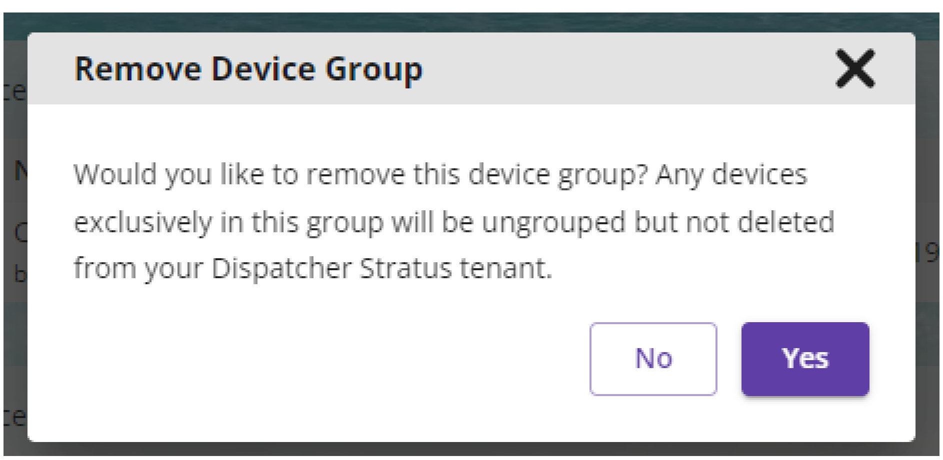
Delete a Device Group

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 provides an intuitive, drag-and-drop interface for creating custom forms you can include in Dispatcher Stratus workflows. A form can be anything from a single-field, Yes or No question ("Who wants to go to lunch today?") to a complex, multi-page, multi-level questionnaire such as a job application. You add your content, style it using Form Builder's extensive set of design tools, and then associate it with node in a workflow, which outputs the form to your desired location such as a cloud storage site. When combined in a workflow with a **People node**, you can route forms to team members or groups, where it becomes a job. The job can then be completed or assigned to another team member. Once completed, a notification is generated and the team can move on to the next step in the workflow.

Notes:

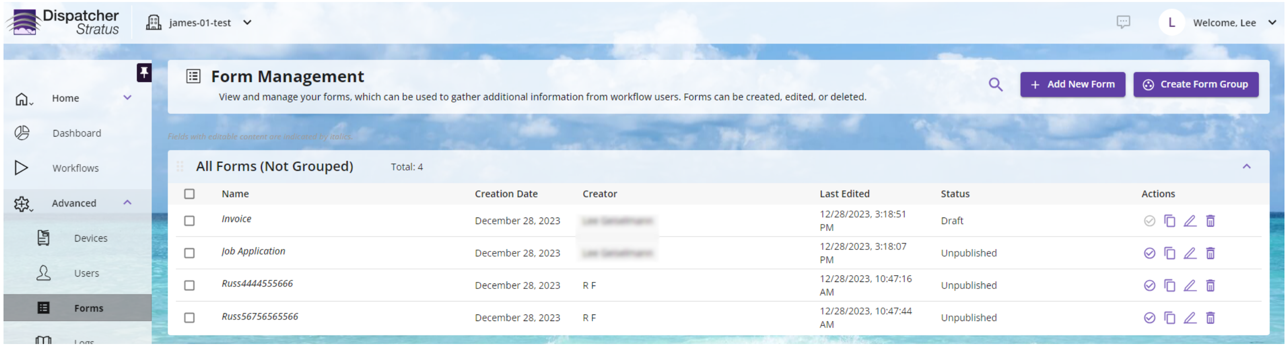
- Information associated with a form, such as default values, is available within the workflow as **metadata**, which can be used in a variety of ways.
- Since a single workflow can contain multiple forms, each metadata key must be unique. If a workflow contains two or more identical metadata keys, each 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 Stratus 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.

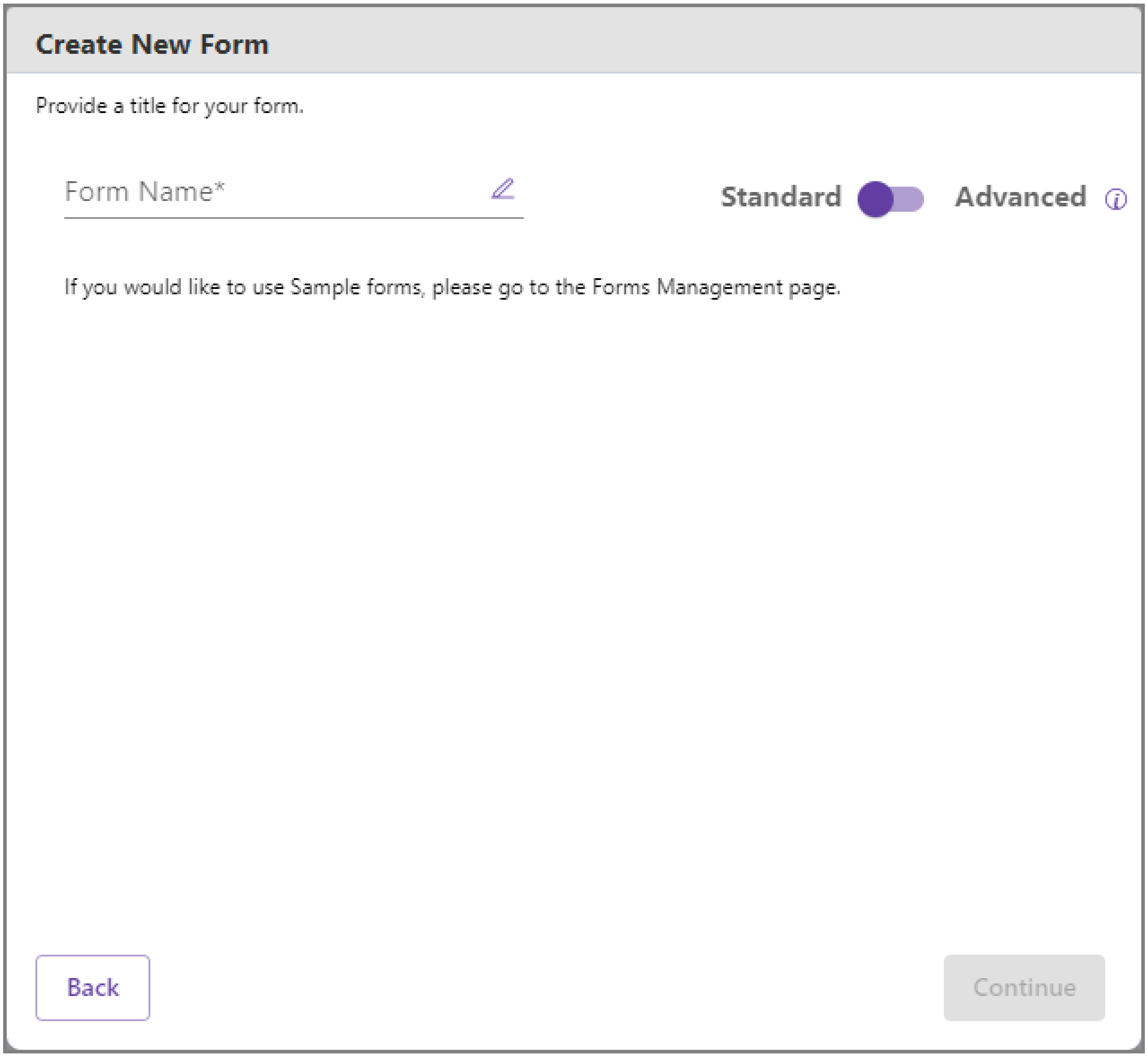
   Note: To edit an existing form, it must be in an **unpublished** state.

Form Builder Templates

The Form Builder provides two templates for creating forms.

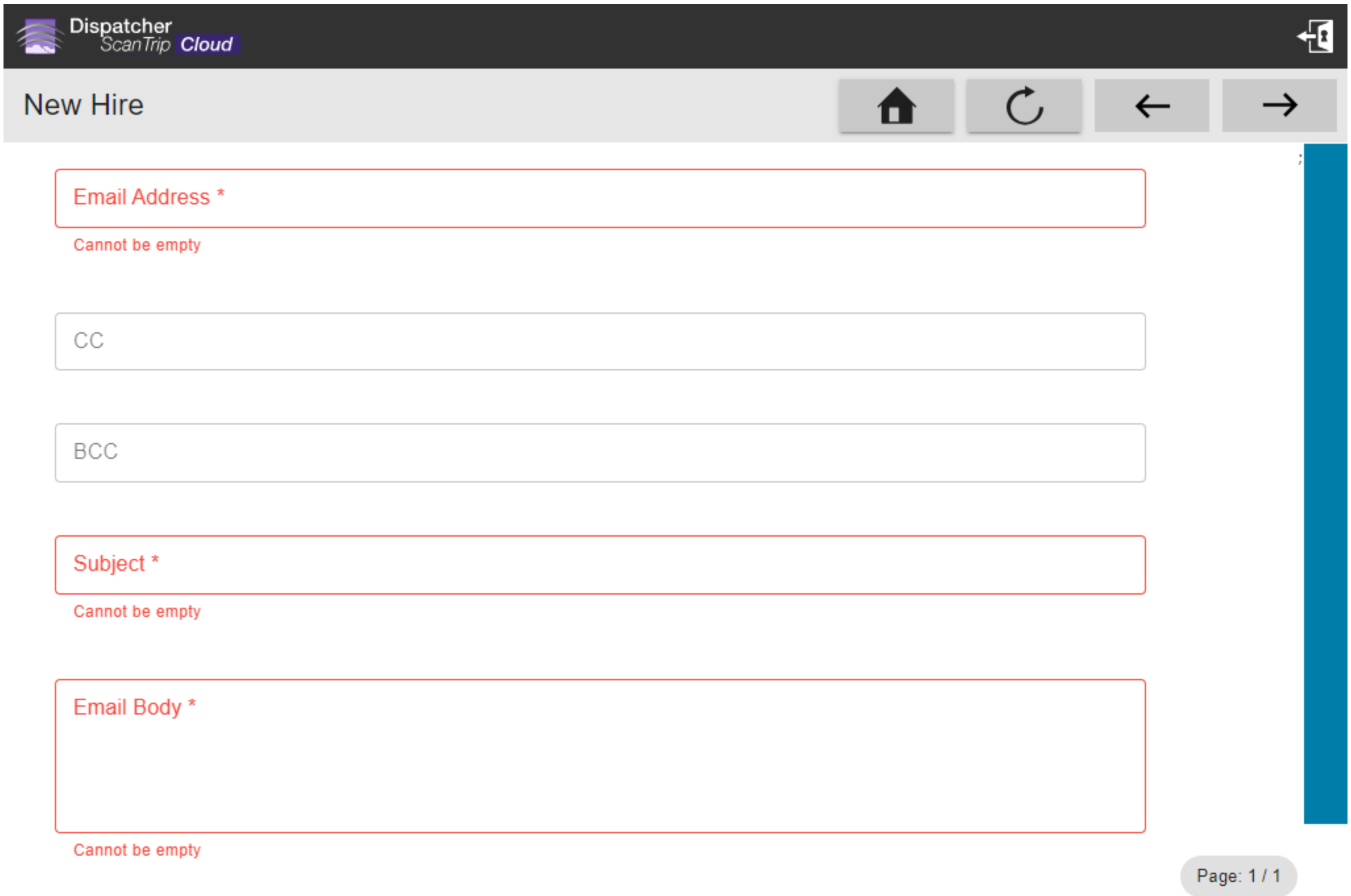
Standard Form

Use this template to quickly build linear forms for use on many common devices, where you can enter identifying information about your scanned documents, choose processing and destination options, and more.



Using a Standard Form

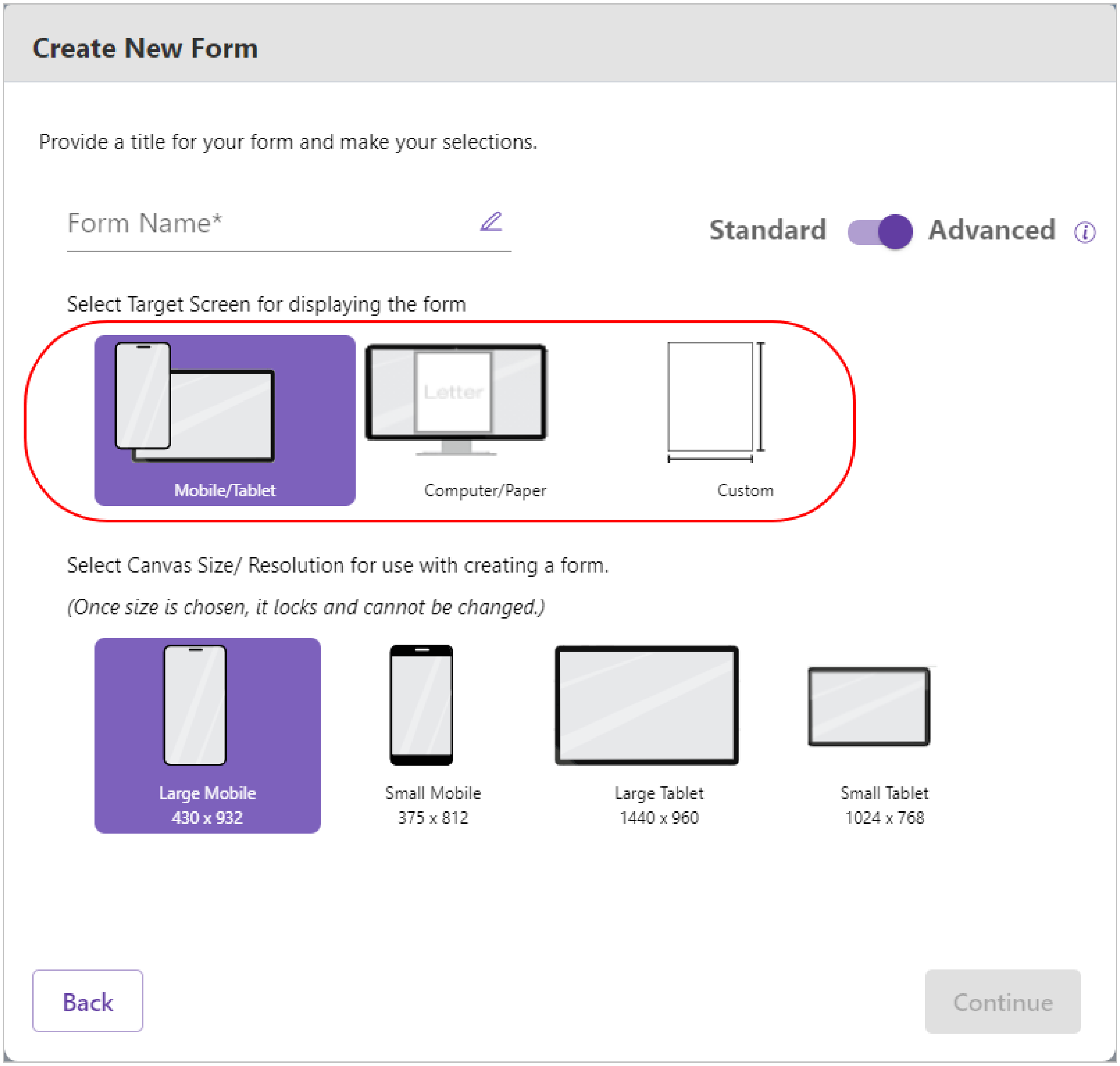
Standard forms are designed to be accessed at the MFP. At the MFP, a Standard Form will look like the following illustration:



Advanced Form

Use this template to create web forms you can share with team members across workflows and even on a third-party website. Web forms created from the Advanced form template have a fixed layout and configuration so that team members can provide requested information without altering the structure of the form. The template provides additional tools and aesthetic options, enabling you to create forms to your exact specifications.

Includes additional tools and aesthetic options, as well as multiple target screens, each of which has a different set of canvas sizes and resolutions.

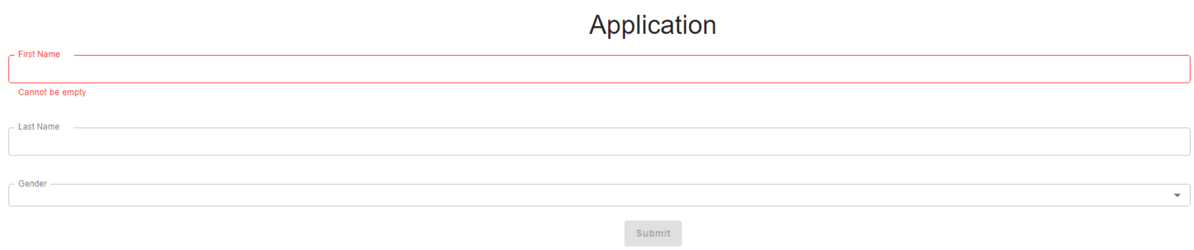


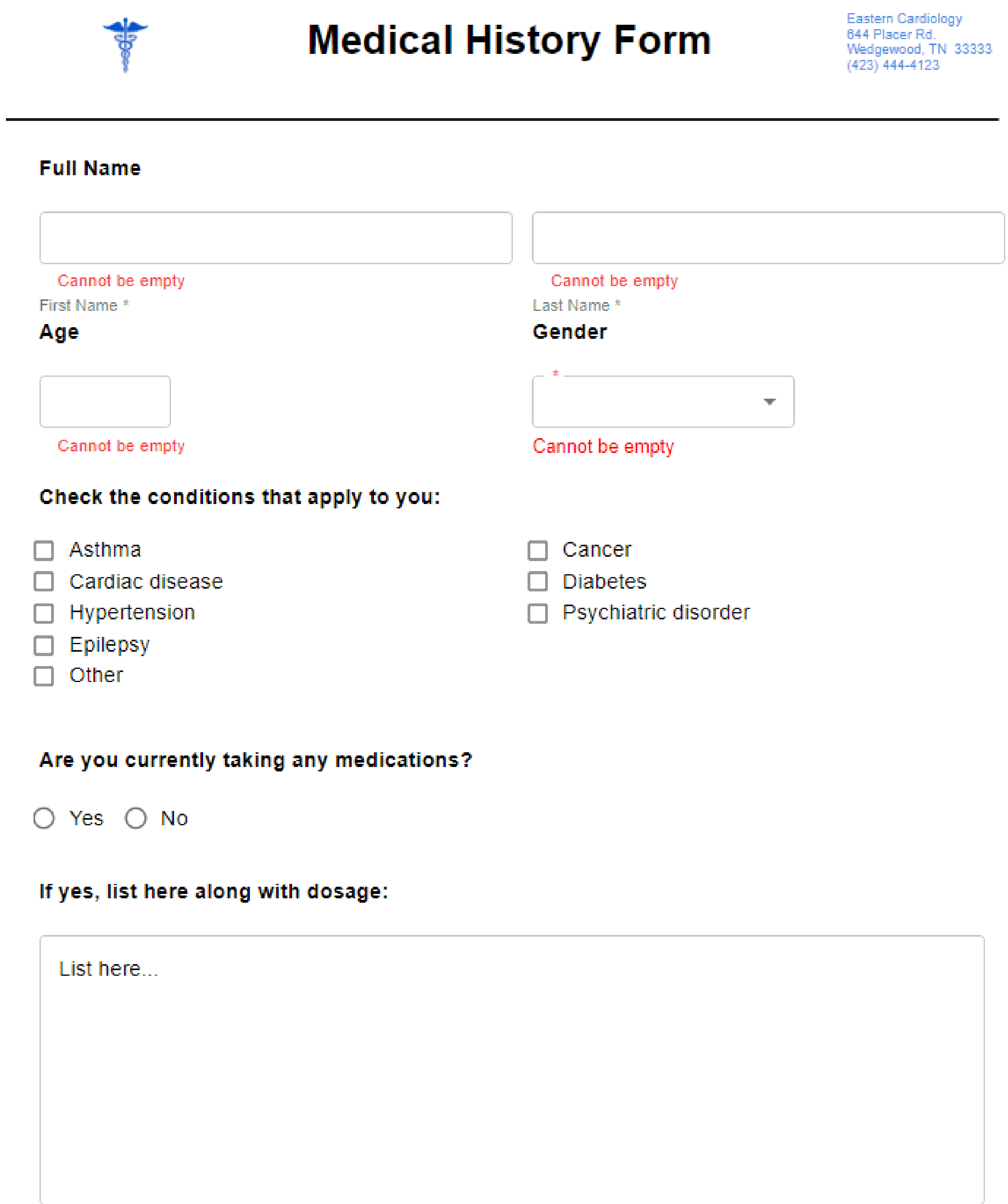
Important! Advanced Forms are intended to be accessed via computer, mobile device, tablet, etc; they are not intended to be accessed via an MFP, and that use case is not supported by Dispatcher Stratus due to limitations of the MFP.

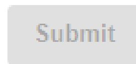
Note: The Advanced form template is available only for Dispatcher Stratus Enterprise tenants.

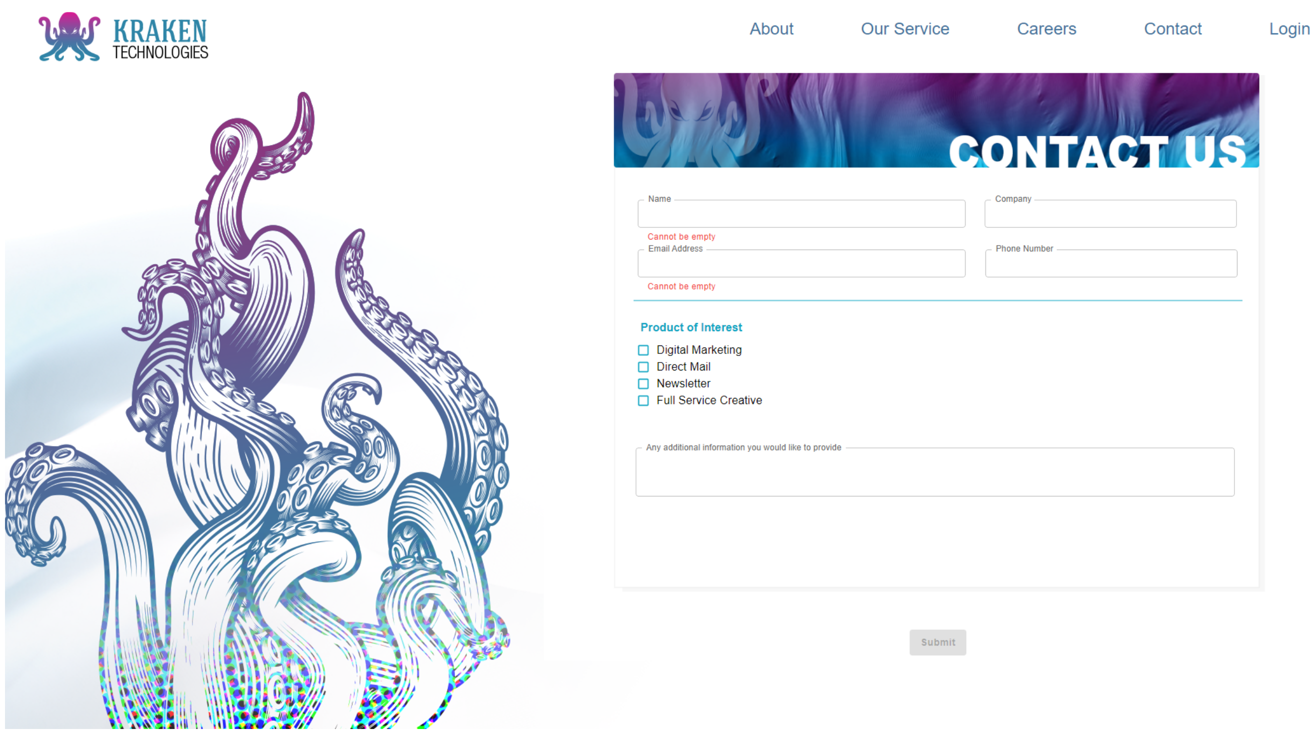
Accessing Advanced Forms

Advanced Forms are designed to be accessed via computer or mobile device. As Advanced Forms come with many different stylization options, you can make your forms appear however you would like. Here are some examples of Advanced Forms:


Application
First Name
Cannot be empty
Last Name
Gender
Submit


Medical History Form
Eastern Cardiology
844 Placer Rd.
Wedgewood, TN 33333
(423) 444-4123
Full Name
Cannot be empty
First Name *
Cannot be empty
Last Name *
Age
Cannot be empty
Gender
*
Cannot be empty
Check the conditions that apply to you:
Asthma
Cardiac disease
Hypertension
Epilepsy
Other
Cancer
Diabetes
Psychiatric disorder
Are you currently taking any medications?
Yes
No
If yes, list here along with dosage:
List here...

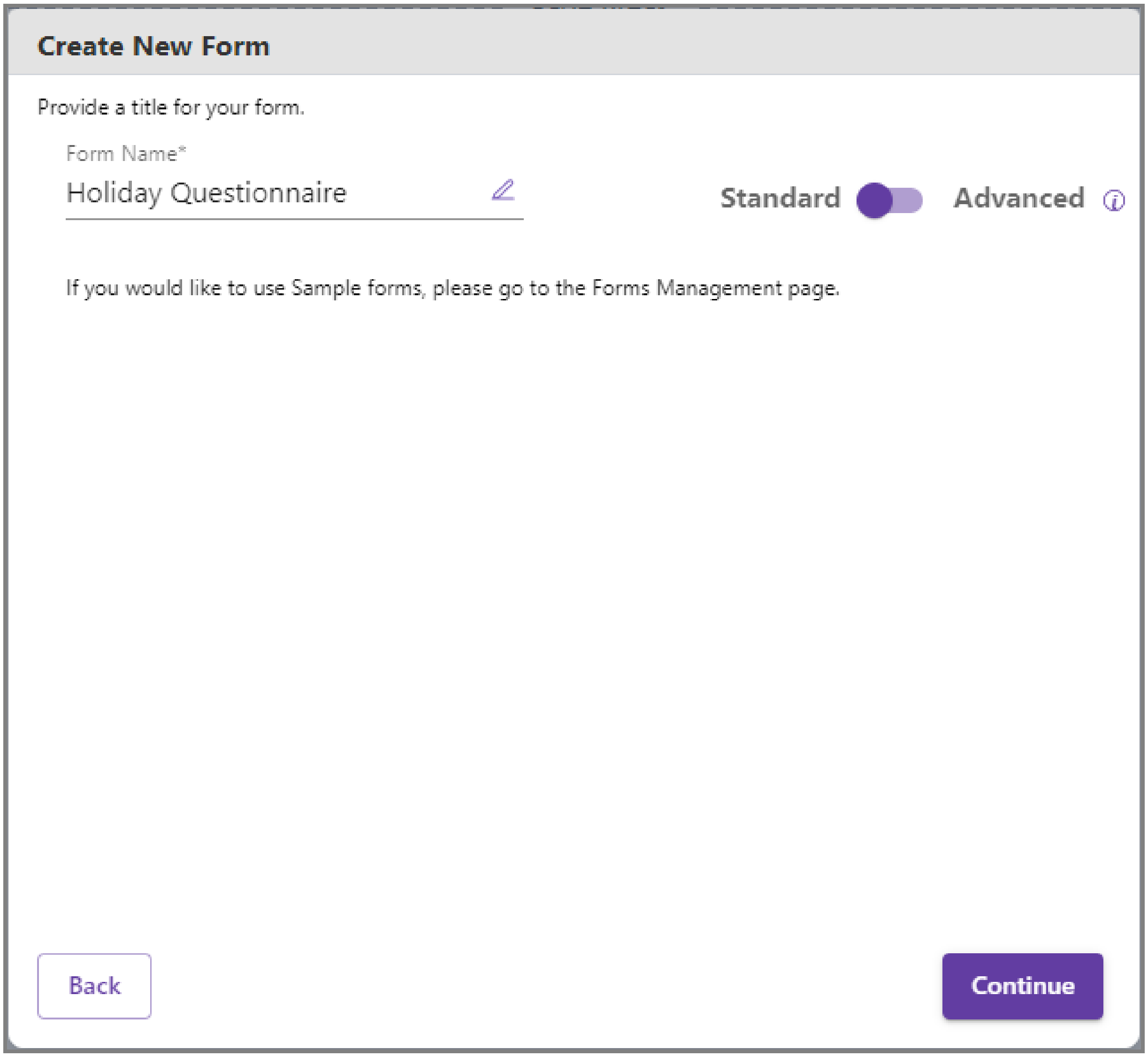




Creating a New Form

Before you can begin adding fields to your form, you must configure certain aspects of the form. Do the following:

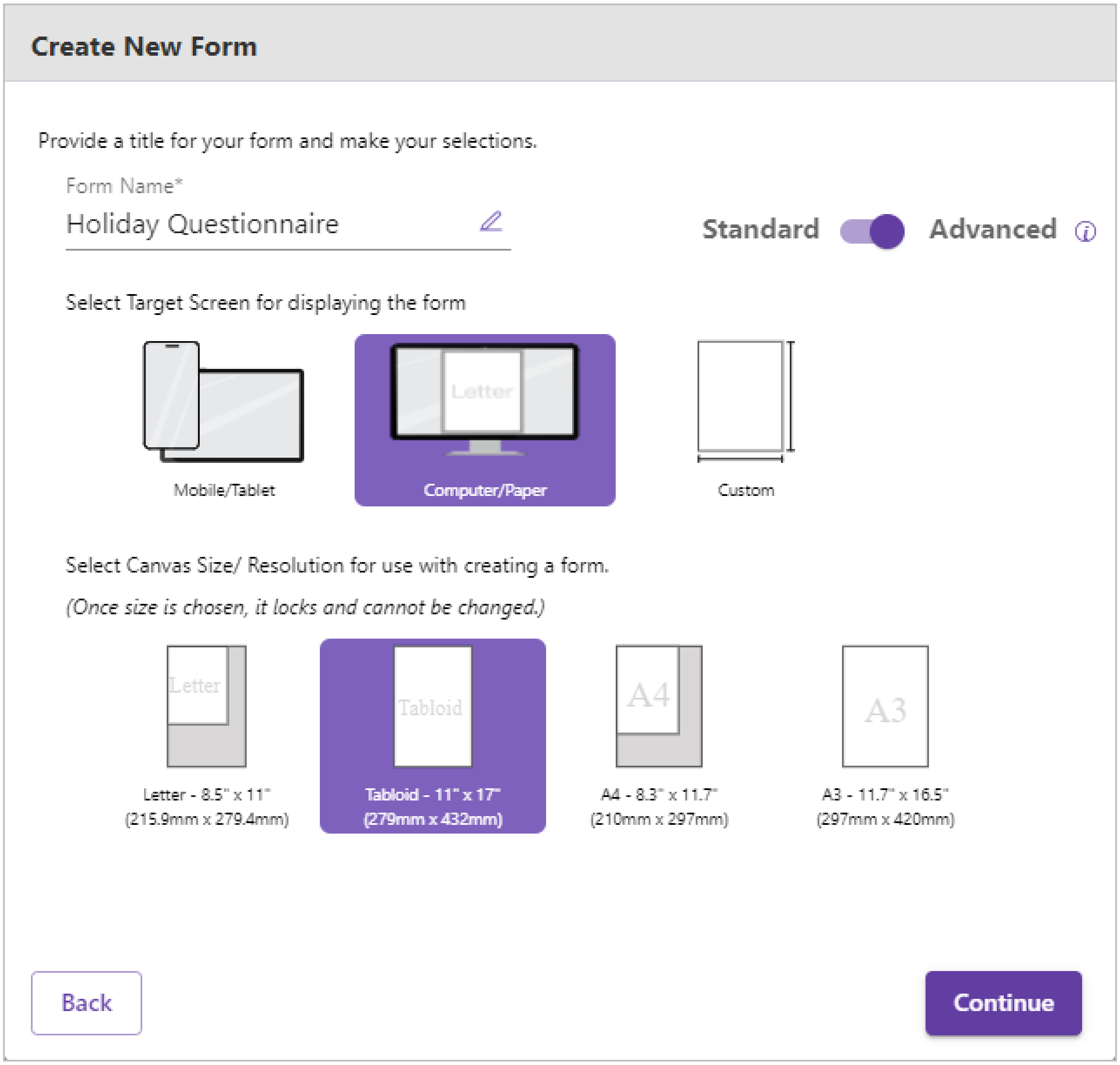
1. Enter a name for the form. The **Continue** button activates.
2. Select the form type by adjusting the toggle switch:
   - **Standard**
   - **Advanced**



3. Select a target screen and a canvas size/resolution for displaying the form.

   a. For a Standard form, the Form Builder will automatically style the form to fit modern MFP screens.

   b. For an Advanced form, select a target screen and a canvas size/resolution for displaying the form.



You have the following options:

Form type	Target screen	Canvas size/resolution
Standard	MFPs	Standard Forms are designed to display on Konica Minolta MFPs
Advanced	Mobile/Tablet	Large Mobile 430 x 932 px Small Mobile 375 x 812 px Large Tablet 1440 x 960 px Small Tablet 1024 x 768 px
Advanced	Computer/Paper	Letter 8.5" x 11" Tabloid 11" x 17" A4 8.3" x 11.7" A3 11.7" x 16.5"
Advanced	Custom	Pixels, Inches, Centimeters, Millimeters, or Points Portrait or Landscape

4. Select the **Continue** button to begin adding fields to your form.

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**).

Note: The Form Builder honors any **Site Appearance** selections made on the Profile page.

Navigation Bar

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

Validate

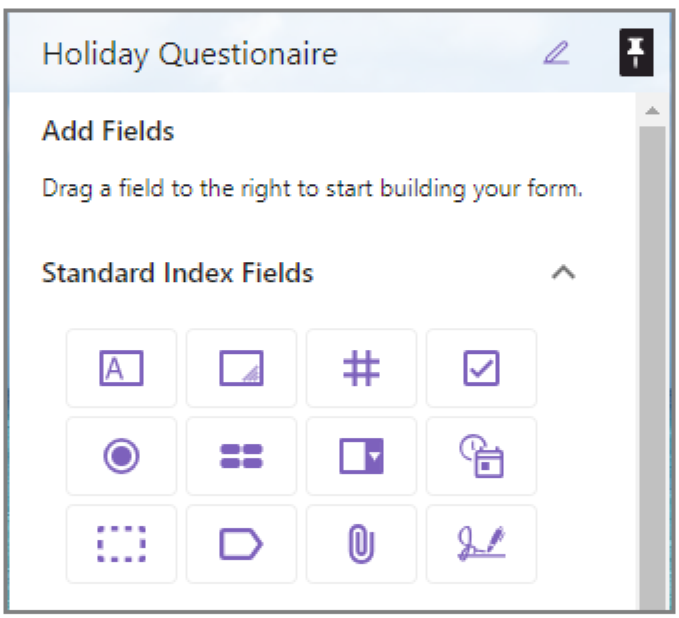
Select the **Validate** icon to check the form for logic errors, such as missing queries or improperly configured fields. A form must be successfully validated before it can be published on the **Form Management** page.

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:

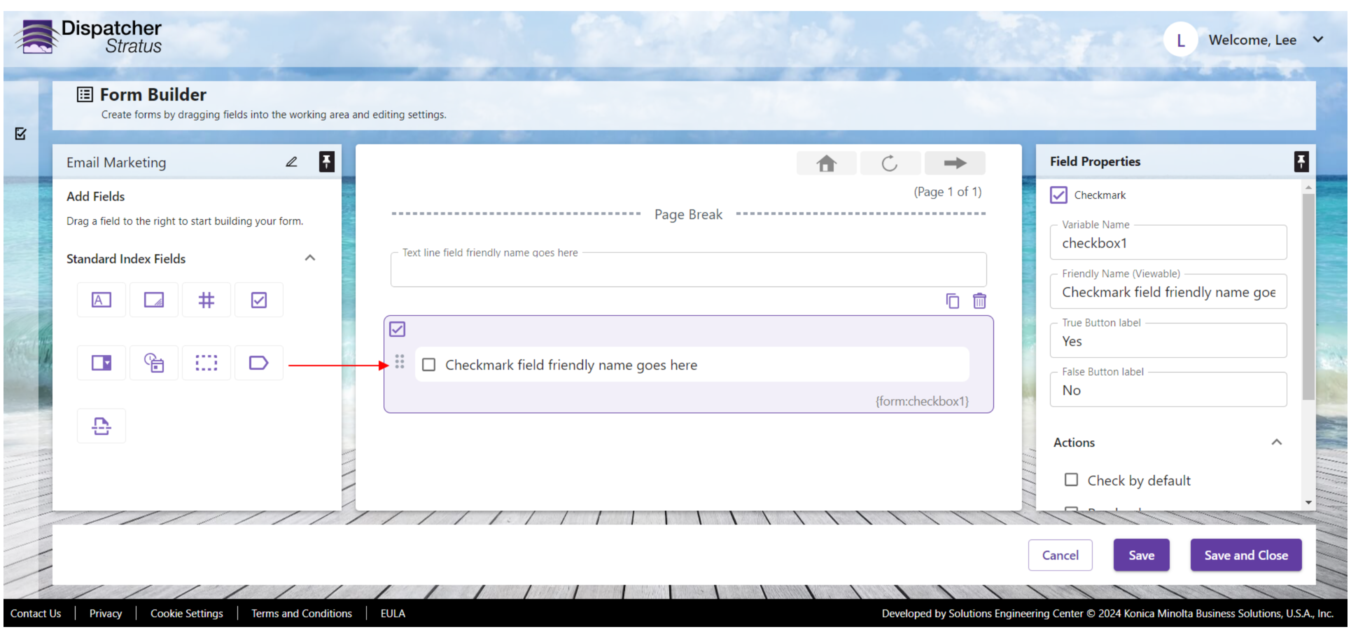
Icon	Field	Description
	Text Line	**Standard**: Allows the user to input a single line of text about the scanned document(s), such as a document name or vendor name. **Advanced**: Allows for the input of a single line of text on the form, for example, a document name or vendor name.
	Text Area	**Standard**: Allows the user to input multiple lines of text about the scanned document(s), such as document names or vendor names. **Advanced**: Allows for the input of multiple lines of text on the form, for example, multiple document or vendor names.
	Number	**Standard**: Allows the user to input a number, such as an invoice number or user ID. **Advanced**: Allows for the input of a number on the form, for example, an invoice number or user ID.
	Checkmark	**Standard**: 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. **Advanced**: Allows for a response to a True/False option on the form, for example, whether or not to convert the document to Searchable PDF format.
	Radio Button	**Standard**: Allows the user to choose an item from a group. **Advanced**: Allows the user to choose an item from a group.
	Button List	**Standard**: Allows the user to choose an item from a group of buttons. **Advanced**: Allows the user to choose one or more items from a group of buttons.
	Drop-down	**Standard**: Allows the user to choose an item from a list. **Advanced**: Allows for a response to a drop-down list on the form.
	Date and Time	**Standard**: Allows the user to associate the date and/or time with the scanned documents. **Advanced**: Allows for the input of the date and time on the form.
	Hidden	**Standard**: 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. **Advanced**: 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	**Standard**: A label is static text to be displayed on the form. **Advanced**: Allows for the input of a label to appear on the form. Label fields are static, unlike the Text Line and Text Area fields, which are dynamic.

Icon	Field	Description
	Page Break	**Standard**: A page break divides the form into different screens. **Advanced**: Not available.
	Signature	**Standard**: Not available **Advanced**: A signature field allows you to add a new or saved signature to a form.
	Attach a file	**Standard**: Not available. **Advanced**: Allows for the attachment of a file to the form.

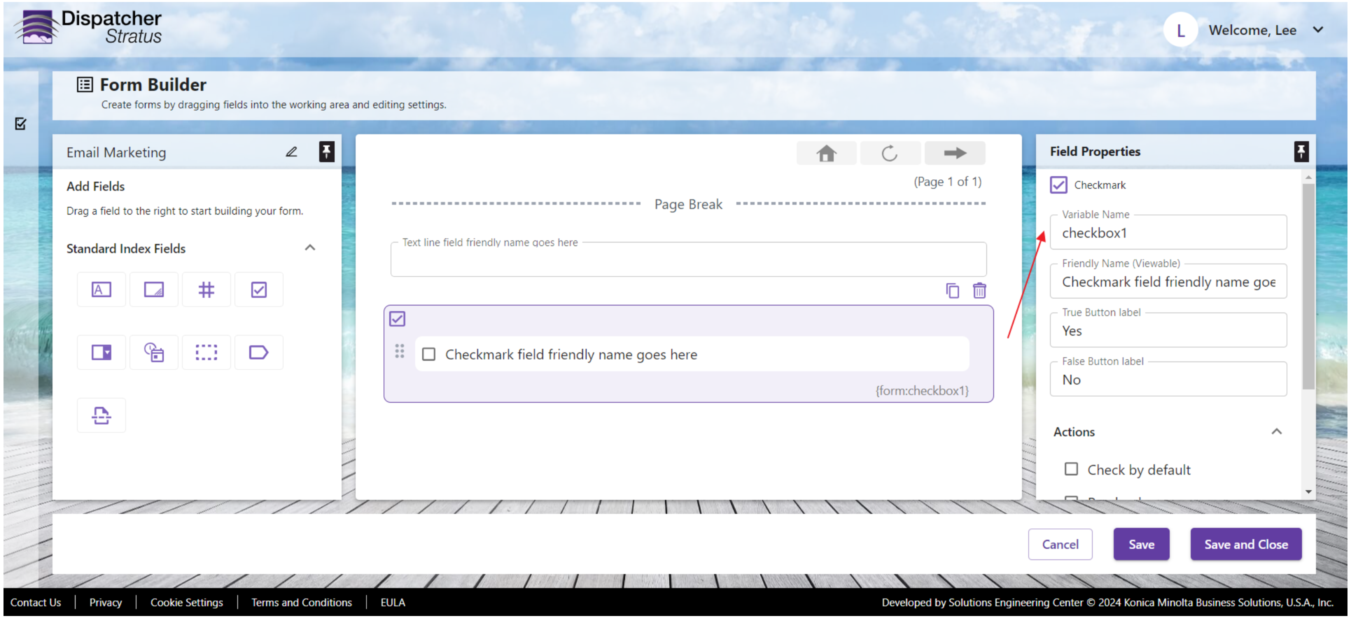
Working With Form Fields

For fields added to a Standard 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.

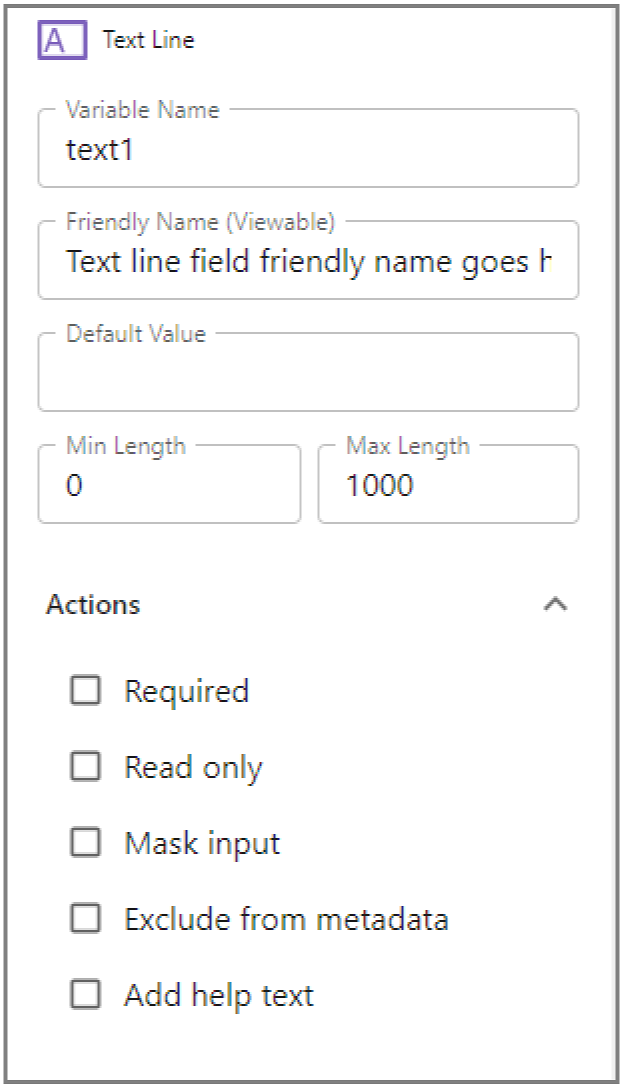


After a field has been added to the canvas, you can select it to view the field configuration options in the Properties panel on the right.



Note: If you right-click on a field in an Advanced form, a menu appears with options such as Clone and Delete.

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}`).

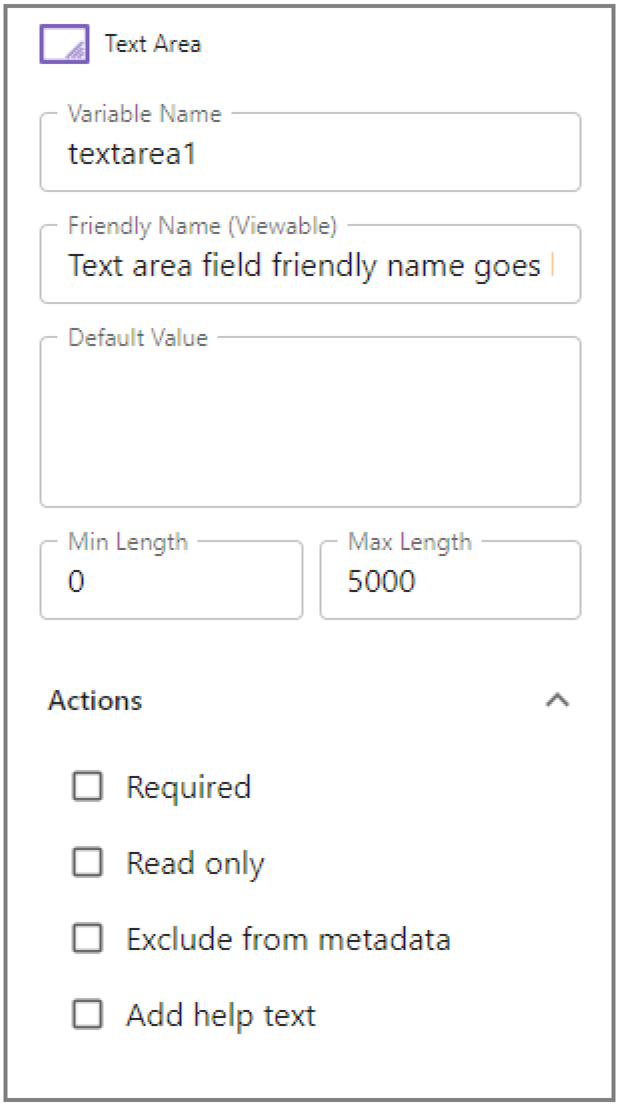
  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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}`).

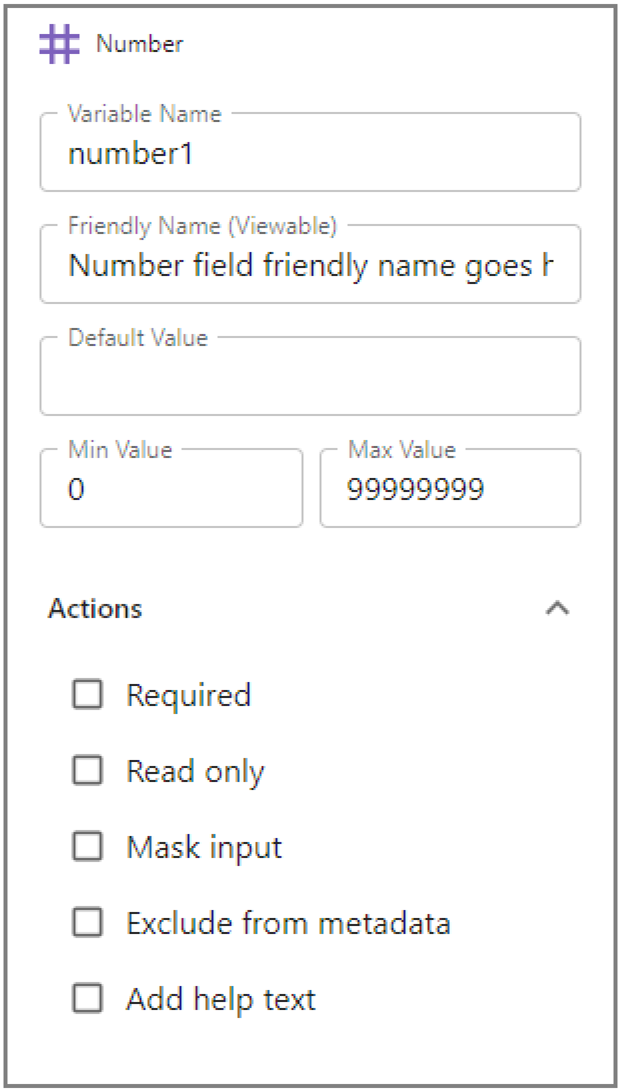
  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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}`).

  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder’s work area.

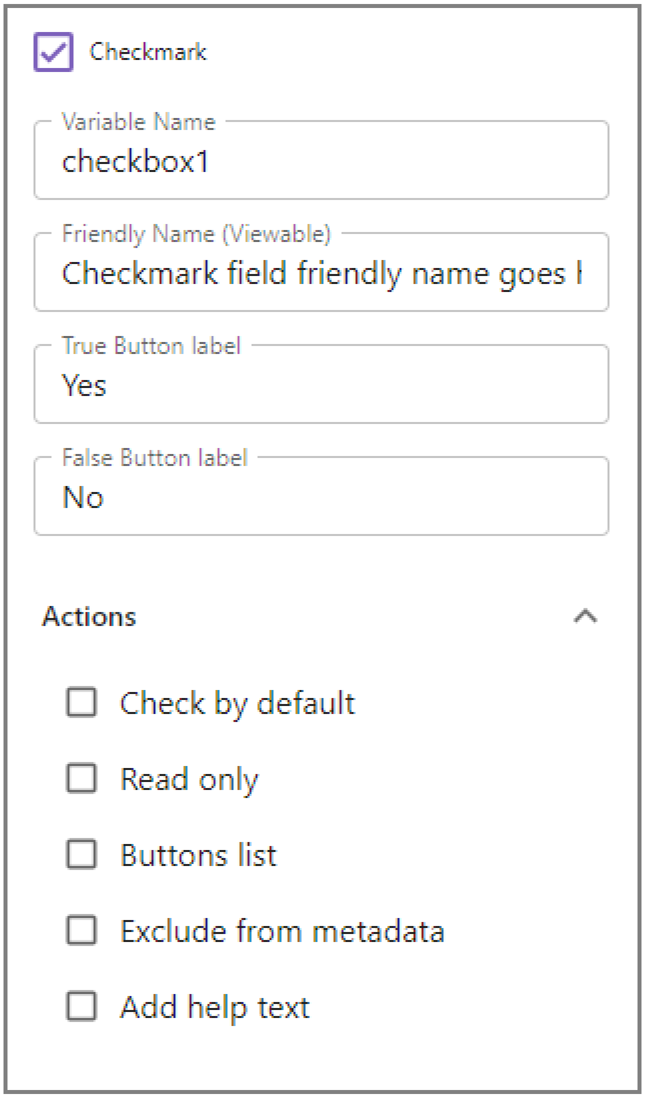
  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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.

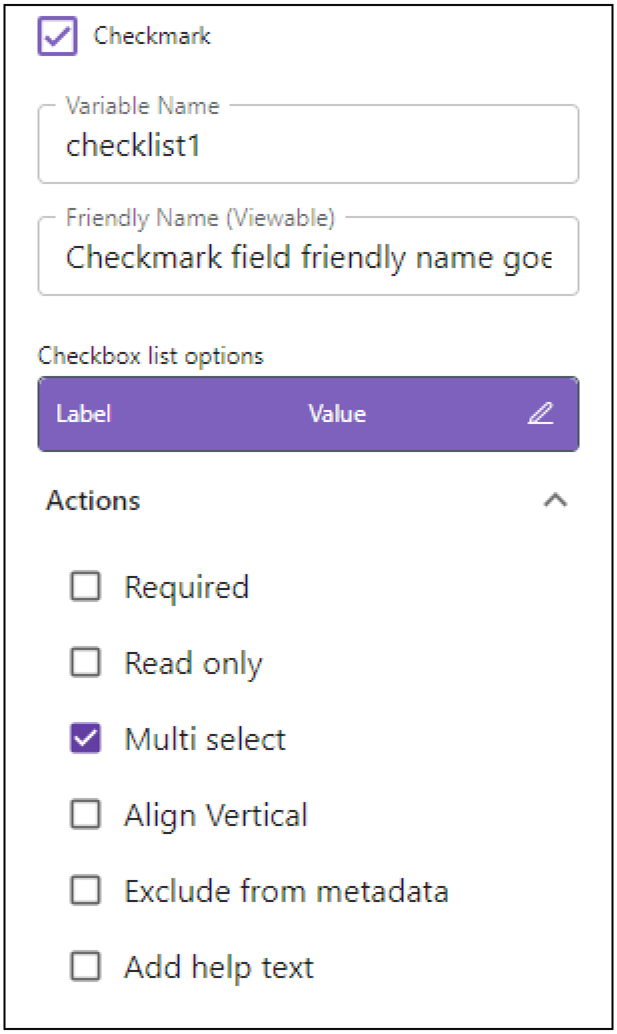
When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Checkmark

Standard Form:



Advanced Form:



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}`).

  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

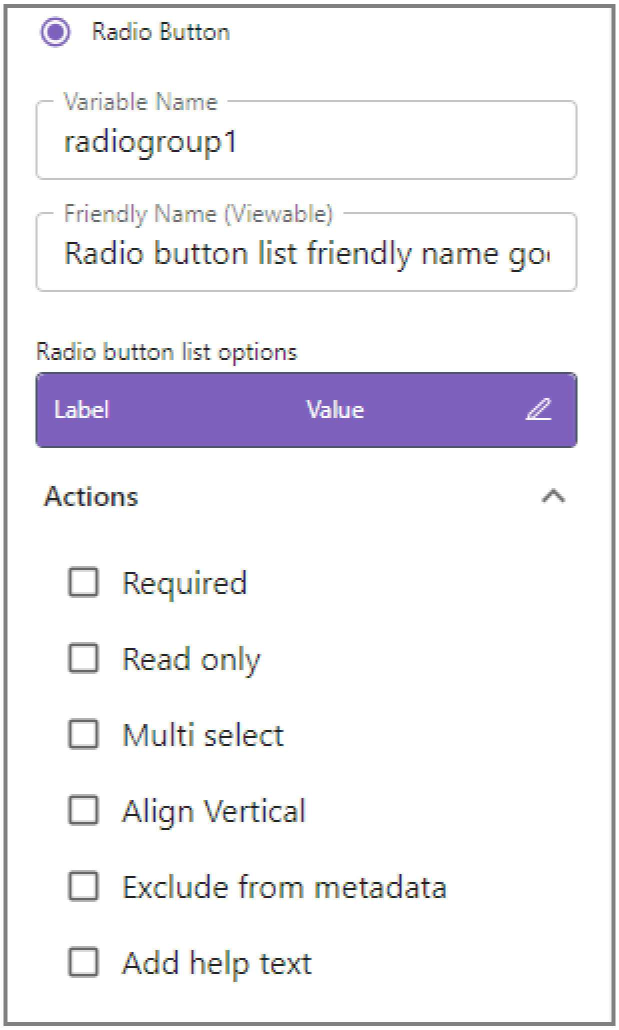
  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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.

- In the **Checkbox 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. (Advanced only)
- In the **Actions** area, you can specify the following, based on which options you select:
  - **Check by Default** - Set this option as automatically selected. (Standard only) If this option is selected along with Button List (below), then the “Yes” option will be selected by default.
  - **Required** - Set as a mandatory field. Required fields are marked with an asterisk (*). (Advanced only)
  - **Read only** - Set as a read only field that cannot be changed.
  - **Multi-Select** - Allow for multiple checkmark fields to be selected. This also affects whether you are able to select one or more list items by default when configuring the field in the Form Builder. For more information, see the **Manually Adding List Items** section below. (Advanced Only)
  - **Buttons List** - Provides the field with buttons instead of checkboxes. (Standard only)
  - **Align vertical** - Keep all checkmark options in a vertical line. (Advanced only)
  - **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 Radio Button



To add a radio button to your form, drag and drop the **radio button** 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}`).

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

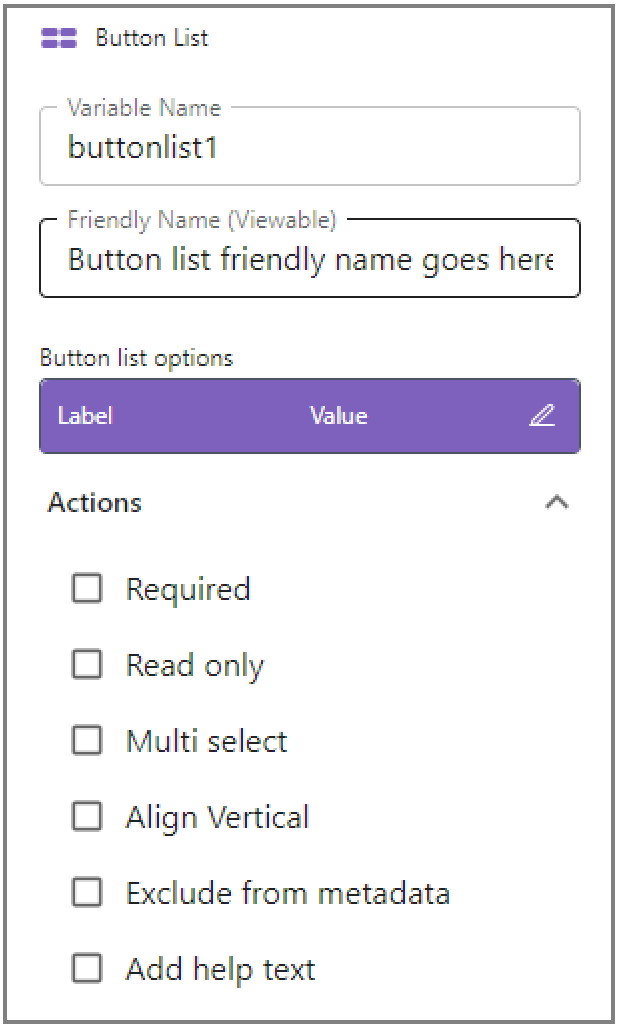
- In the **Friendly Name** field, enter the text that will appear above the check box. The Friendly Name will always be visible to users who access the form.

- Customize the labels for the buttons that will appear in the **True Button Label** and **False Button Label** fields. (Standard only)

- In the **Checkbox 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. (Advanced only)
- 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 read only buttons that cannot be changed.
  - **Multi select** - Allow the user to choose more than one item from the list at a time.
  - **Align vertical** - Keep all buttons in a vertical line.
  - **Buttons list** - Selecting this option provides the user with two buttons, labeled using the text from the **True Button Label** and **False Button Label** fields, rather than a single checkbox.
  - **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 Button List



To add a series of buttons to your form, drag and drop the **Button 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}`).

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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.

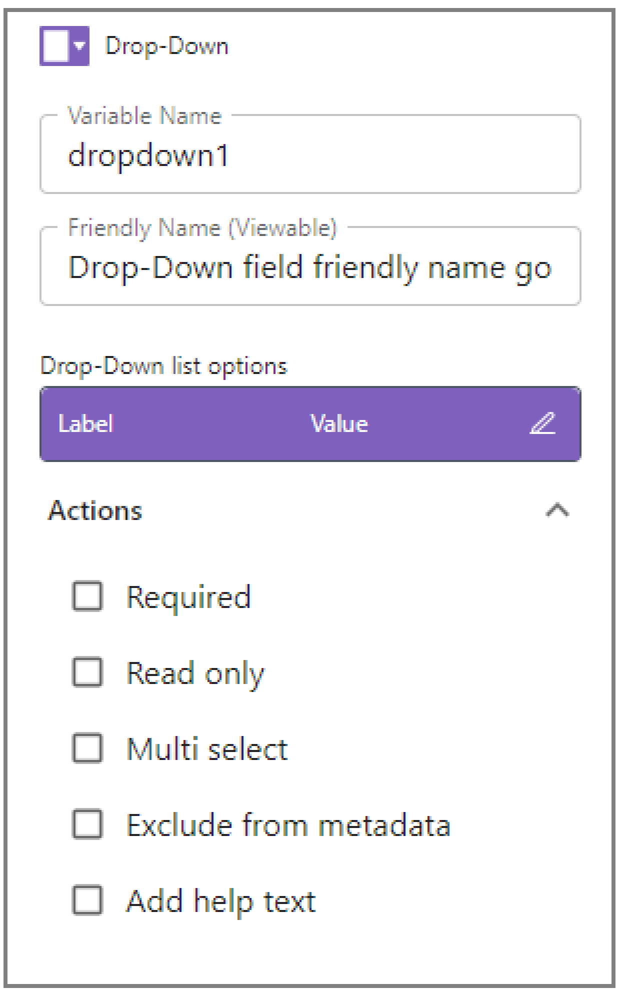
- In the **Button list options** area, enter the text and values that will appear in the button list. For more information, see the **Manually Adding List Items** section below.

- 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.
    - **Align vertical** - Keep all buttons in a vertical line.
    - **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.

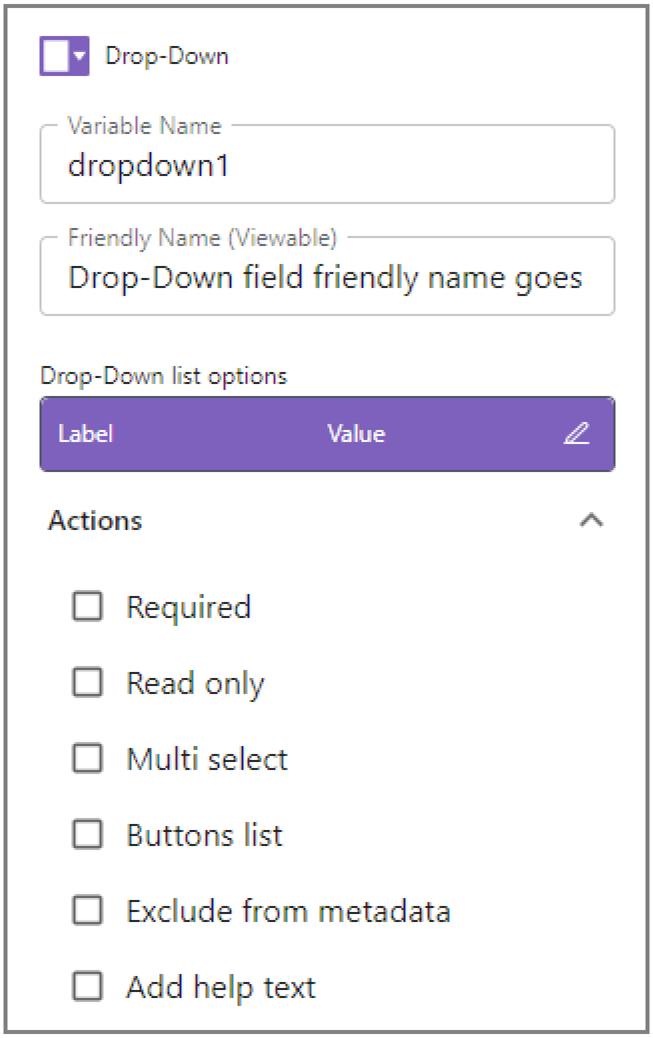
When used in the Advanced Form Builder, you will also have access to many additional **stylization options**.

Adding a Drop-down List

Standard Form:



Advanced Form:



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}`).

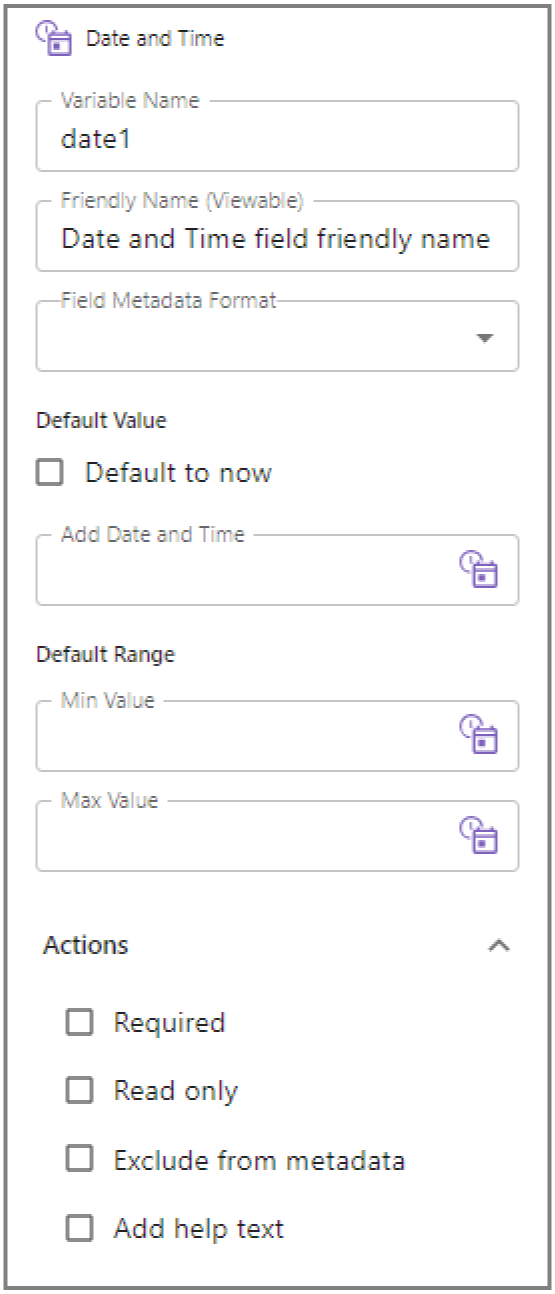
  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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:

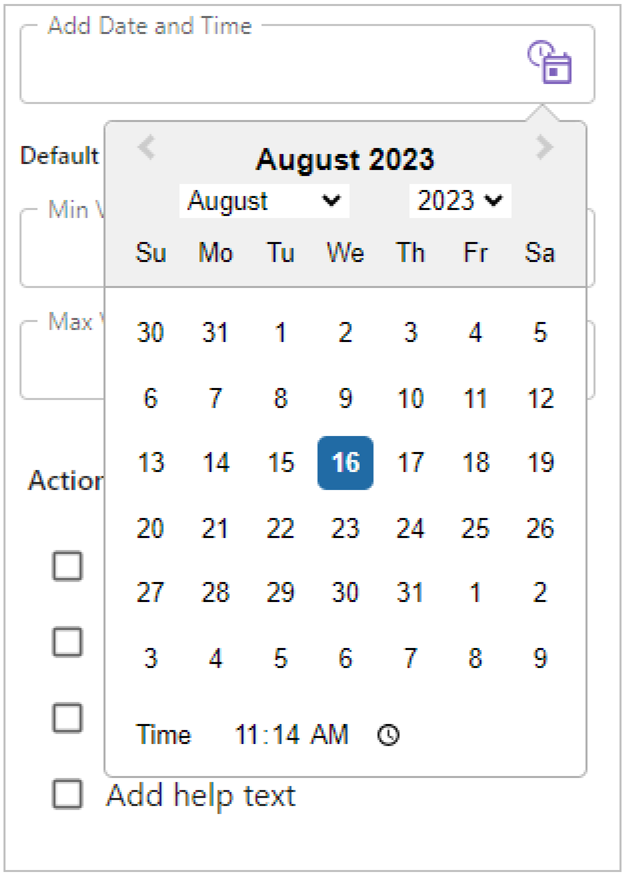
- In the **Variable Name** field, enter an internal, identifying name for the field that can be referenced by other nodes in the workflow or other fields on the form. The variable name will not be visible to users. Spaces are not allowed. All variable names in a form must be unique.

  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}`).

When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder’s work area.

Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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.

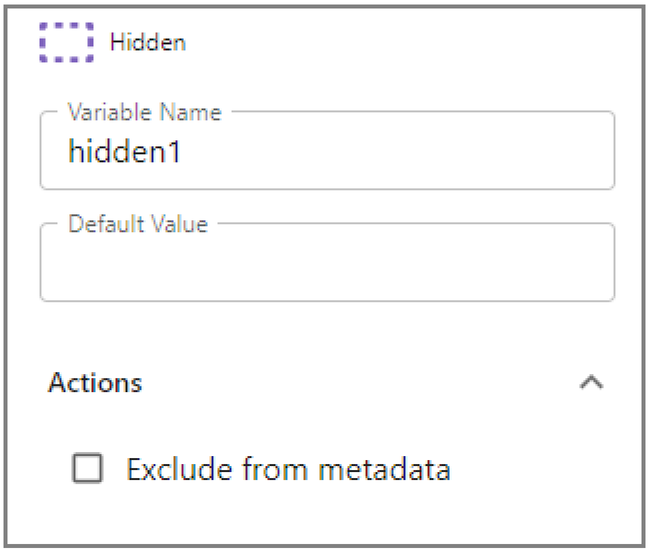


- If you check the **Default to now** box, the current date/time will be displayed.
- If you would like to specify a specific date and time, enter it in the **Add Date and Time** field.
- In the **Default Range Min Value** and **Max Value** fields, you can specify minimum and maximum values for the date 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}`).

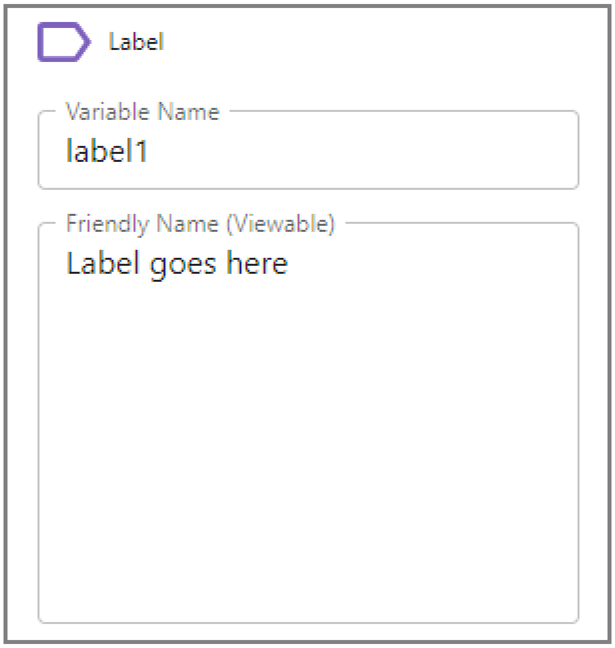
  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder’s work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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}`).

  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder’s work area.

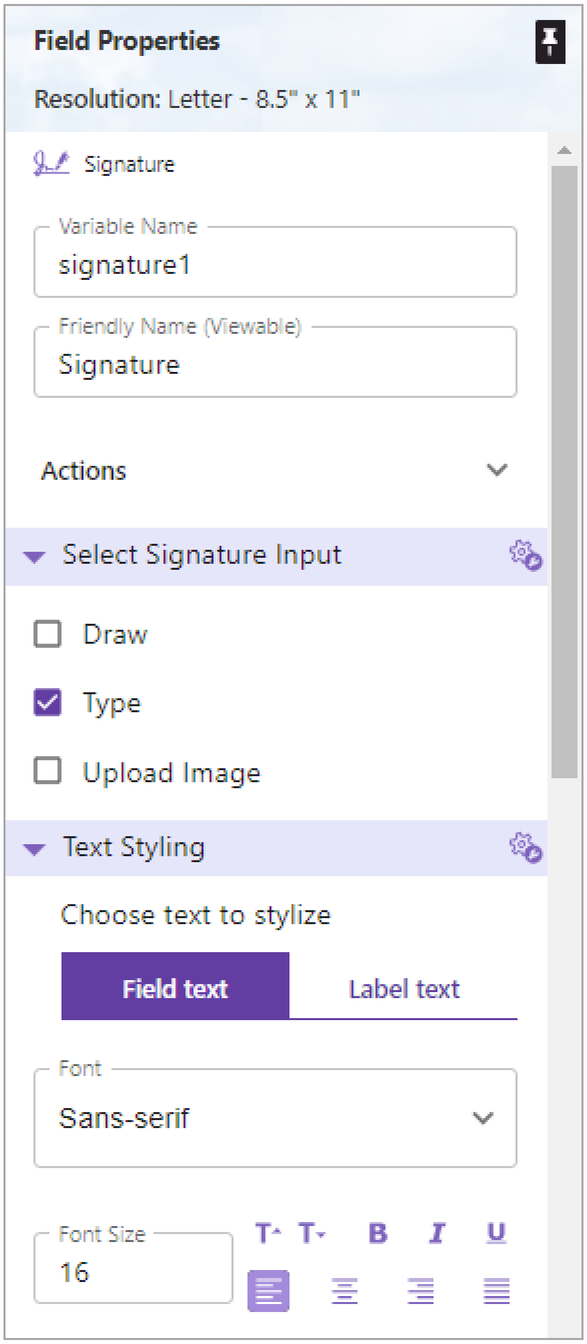
  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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 Signature

To enable recipients of a form to add an electronic signature to the form, drag a **Signature** icon onto your work area. Default text of “Click here to sign” appears in the field. If you select the field, the Field Properties panel displays your customization options for the Signature field.



You have the following options:

- **Variable Name** - A default variable name appears. You can edit this name to be more descriptive of the field's function and more identifiable if you need to reference it later. All variable names in a form must be unique; spaces are not permitted. Variable names are internal to the form and not visible to users of the rendered form.

  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}`).

  Note: If multiple forms are available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

  Note: When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder's work area.

- **Friendly Name** - Enter the label you want to appear above the Signature field. The friendly name will always be visible to users at the MFP.
- **Actions** - Specify any of the following:
  - **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.
- **Select Signature Input** - Specify the input method(s) you want to make available to the form's respondents. You have the following options:
  - **Draw** - Use a finger or cursor to draw a signature.
  - **Type** - Use a keyboard to type a signature. If you select this option, the Field Properties panel expands to display the **Text Styling** options.
  - **Upload** - Browse for an existing electronic signature stored on a connected device. The Signature field supports .png and .jpg images up to 2 MB.

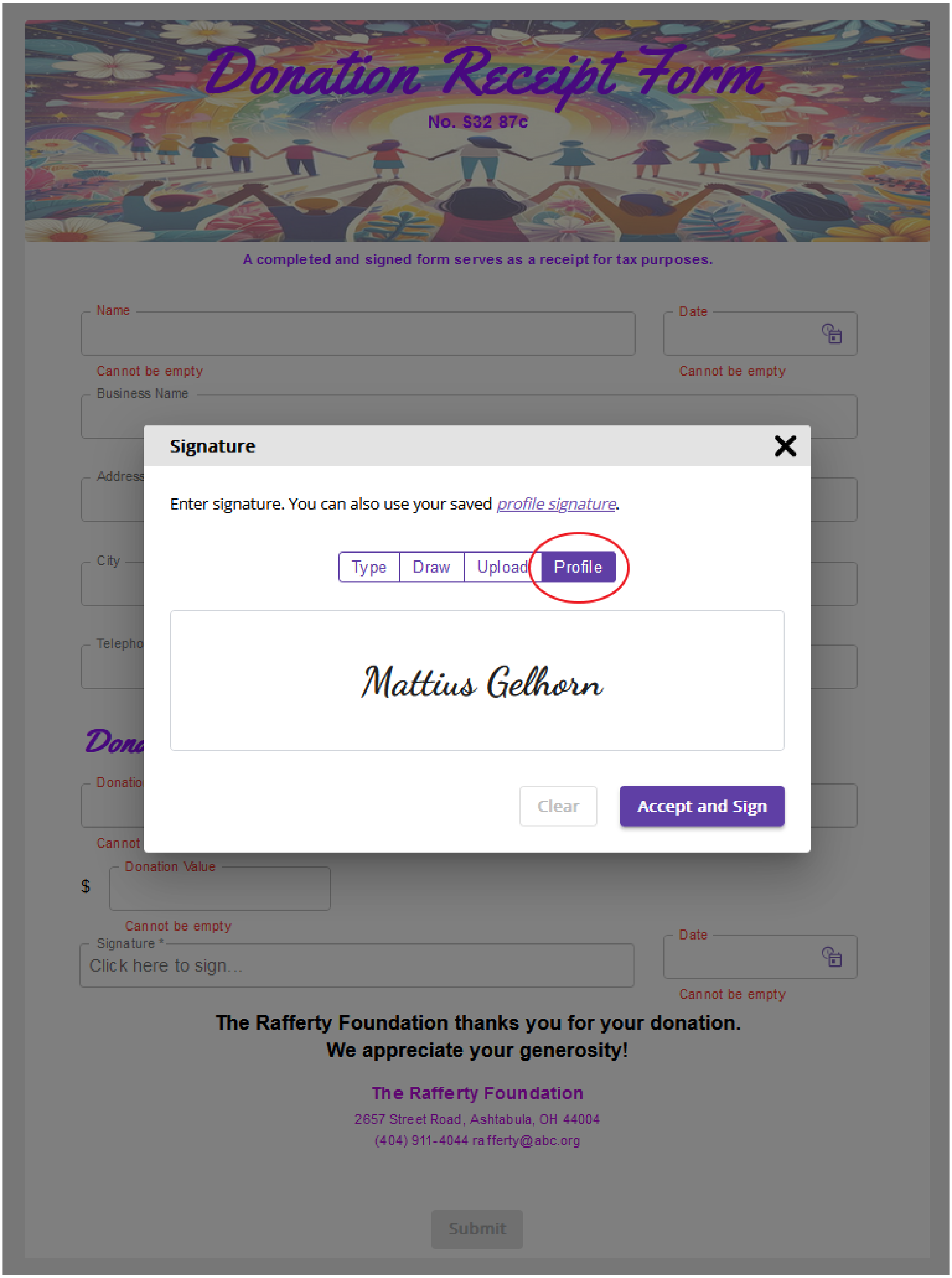
Notes:

- The Advanced Form Builder provides many additional **stylization options**.
- The Form Builder supports up to ten Signature fields within a single form.
- The Signature field scales the size of any added signature to the space provided. This can impact readability if the field is configured to be extremely large or small.
- After a Signature field has been completed, it cannot be edited within one of the **People Nodes** except by the person who added the signature (provided they have permissions for the People Node).

Profile Signature

The Profile page provides tenant members with the ability to create a personal electronic signature for use in Dispatcher Stratus forms that contain a signature field. For tenant members who enable their **profile signature** in their tenant profile, the Profile option becomes available for selection on a rendered form. This option is available only if the signature is enabled on the user's Profile page. Since the option is activated via the Profile page, it is not a selection option at the Select Signature Input field described above.

The following illustration of the Signature window shows all available options as they appear on a rendered form, with the Profile option selected and displaying the user's profile signature:

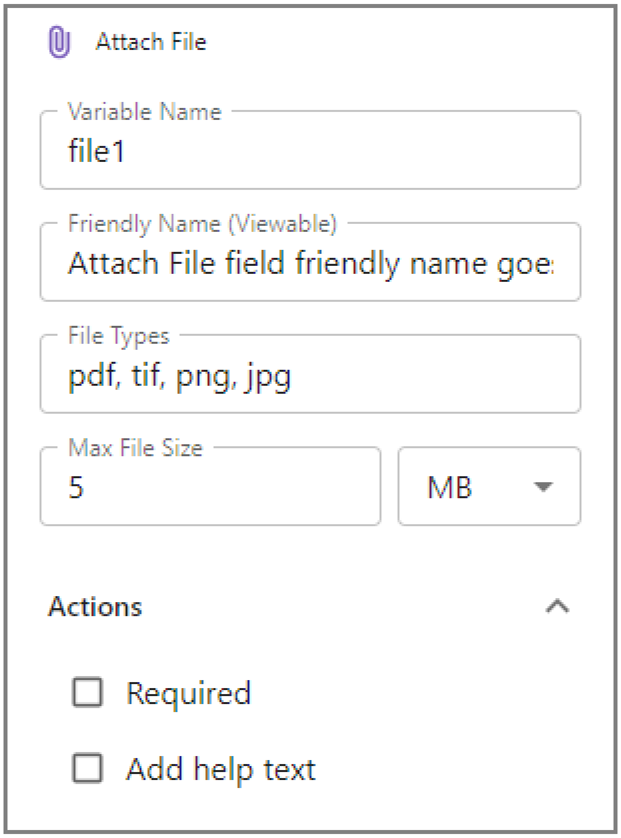

Donation Receipt Form
No. S32 87c
A completed and signed form serves as a receipt for tax purposes.
Name
Cannot be empty
Date
Cannot be empty
Business Name
Address
City
Telepho
Don
Donatio
Cannot
Signature
Enter signature. You can also use your saved profile signature.
Type
Draw
Upload
Profile
Mattius Gelhorn
Clear
Accept and Sign
Donation Value
$
Cannot be empty
Signature *
Click here to sign...
Date
Cannot be empty
The Rafferty Foundation thanks you for your donation.
We appreciate your generosity!
The Rafferty Foundation
2657 Street Road, Ashtabula, OH 44004
(404) 911-4044 rafferty@abc.org
Submit

Notes:

- The **profile signature** link accesses the Profile page, where the user can modify their profile signature.
- Your profile signature is not affected by any signatures you create and submit in a rendered form. You can only create or edit your profile signature on the Profile page.

Attaching a File

Advanced Forms Only



To add a file attachment point to your form, drag and drop the **File Attachment** icon to the Form Builder Canvas area.

Note: This form field works only with the following collection nodes:

- External Form
- Internal 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}`).

Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

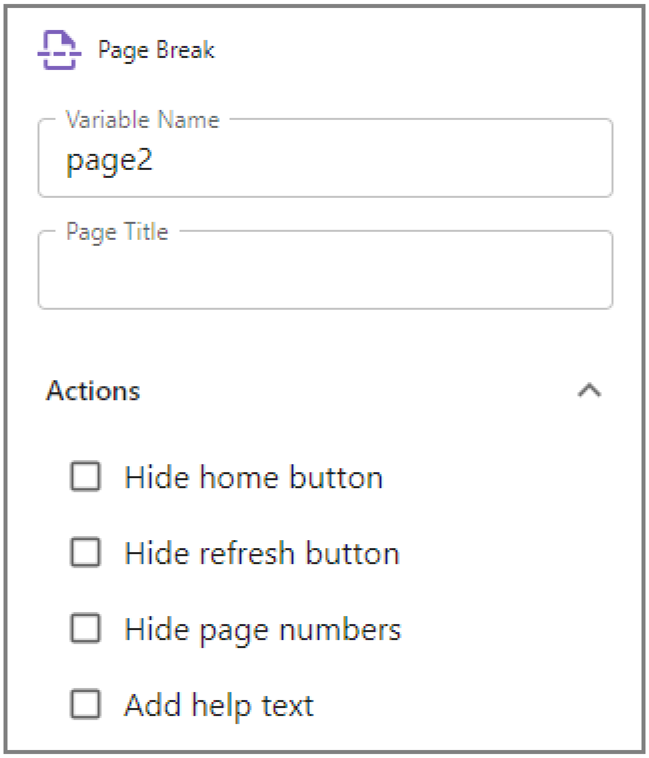
The variable name will be listed in the Field Properties panel on the right side of the page.

- In the **Friendly Name** field, enter the label you want to appear above the Attach File field.
- In the **File Types** field, specify which document types you would like to accept. By default, the field is limited to pdf, tif, png, and jpg files. If you set the field to empty, it will accept any file type.
- In the **Max File Size** field, specify the maximum size document, in MB or KB, you would like to accept.
- In the **Upload Multiple Files** box, you can elect to allow one or more than one file upload.
- 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 (*).
    - **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.

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}`).

  When building a Standard form, the variable name will be listed to the bottom right of the field in the Form Builder’s work area.

  Note: If there are multiple forms available within a single workflow, the metadata syntax must be manually modified to differentiate between forms. For more information, see the **Form Metadata** section.

- 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 and Free Form Creation

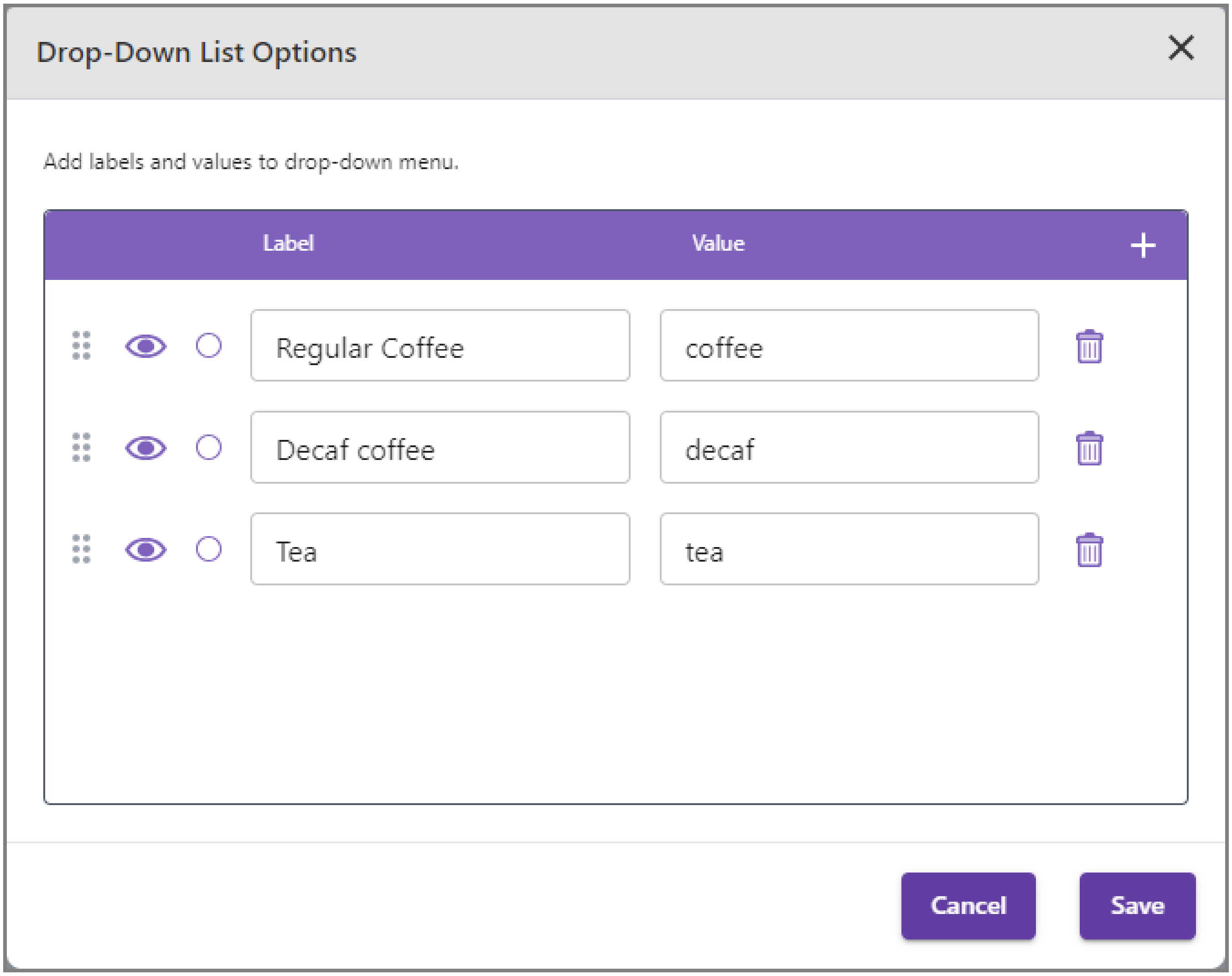
When creating a Standard form, you may arrange form fields by dragging and dropping them into the canvas area, using the six dots icon on the left side of the field. Fields may only be positioned above or below previously-added fields.

When creating an Advanced form, you may arrange form fields by dragging and dropping them into the canvas area. Fields may be positioned anywhere within the bounds of the preselected canvas size, including next to or on top of previously-added fields.

Note: If you attempt to position any portion of a field outside of the canvas, it will automatically reposition to the closest available position on the canvas.

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.



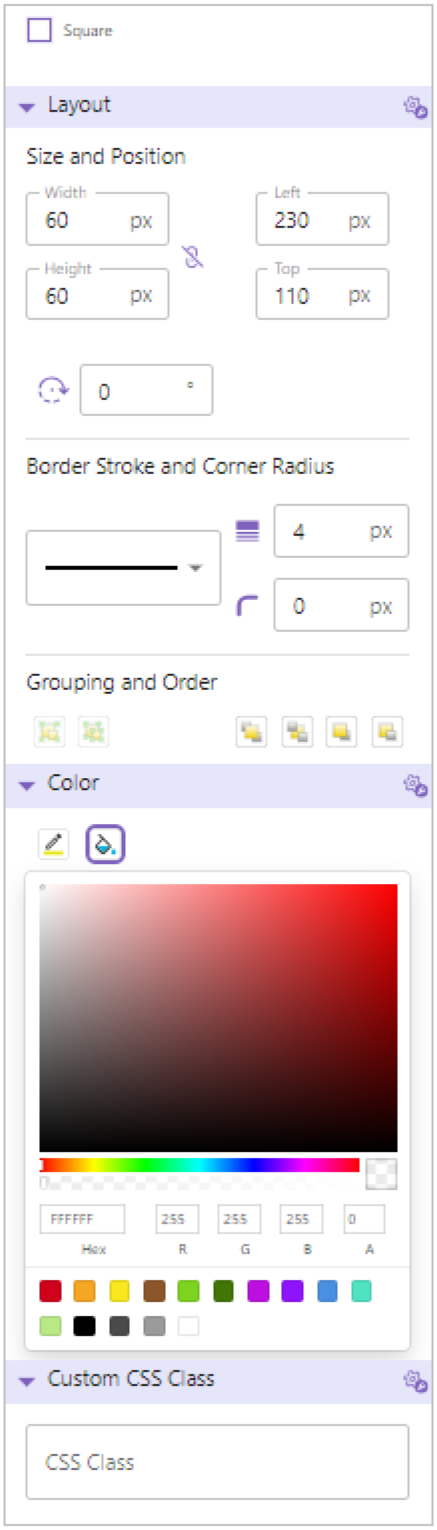
Add as many options as you want by selecting the **+** button. Each list item has the following options:

- **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.

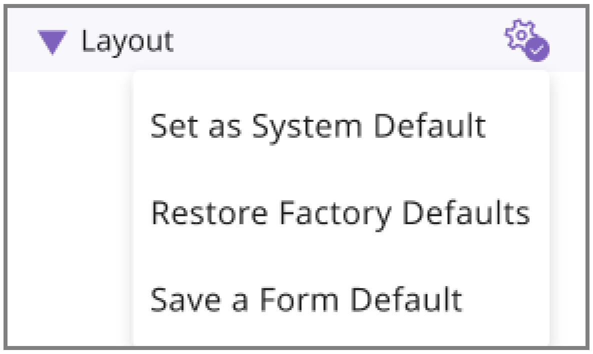
Note: Options in this window may display differently depending on options selected in the Properties Panel. For example, when the Multi-Select option is selected, options in this window appear with checkboxes, which allow for multiple selections. When the Multi-Select option is not selected, options 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.

Advanced Forms Style Options

When using Advanced Forms, many fields have additional stylization options not found in the Standard Form Builder. These can be found in the **Properties Panel** on the right of the canvas.

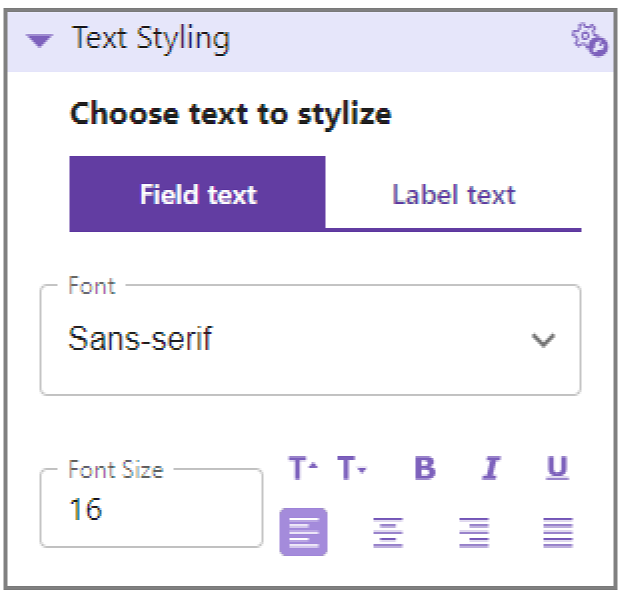


Each subsection includes an icon  that, when clicked, will open a context menu with the following options:



- **Set as System Default** - This will save the associated values as the default for all forms built within the tenant.
- **Restore Factory Defaults** - This will return the values to the default Dispatcher Stratus values.
- **Save a Form Default** - This will save the values for any subsequent fields, tools, etc. created within this form.

Text Styling



These options modify the text associated with this field or tool, and can modify either the **Field text**, which affects anything entered by a user in the field, or the **Label text**, which modifies the text associated with the field, such as the field title.

Control Name	Control Type	Description
Font	Drop-down menu	The style of text. Current options include: San-Serif, Serif, Monospace, and Yellowtail. These fonts are built in and should be available in any browser.
Font Size	Editable field	The size of the text, measured in pixels.
Increase Font Size	Button	Increase the size of the font by one pixel.
Decrease Font Size	Button	Decrease the size of the font by one pixel.
Bold	Button	A thicker and darker style of text.
Italic	Button	A cursive style of text designed to mimic calligraphic writing.
Underline	Button	Add a line under the text.
Left Align	Button	Each line begins the same distance from the left edge of the field.
Center Align	Button	Each line is aligned with the center of the boundary area, with even space on either side of the line of text.
Right Align	Button	Each line begins the same distance from the right edge of the field.
Justify	Button	For multiple lines, each line of text will take up the entire available width, adjusting letter spacing to fill the space. For single lines, text will display as left aligned.

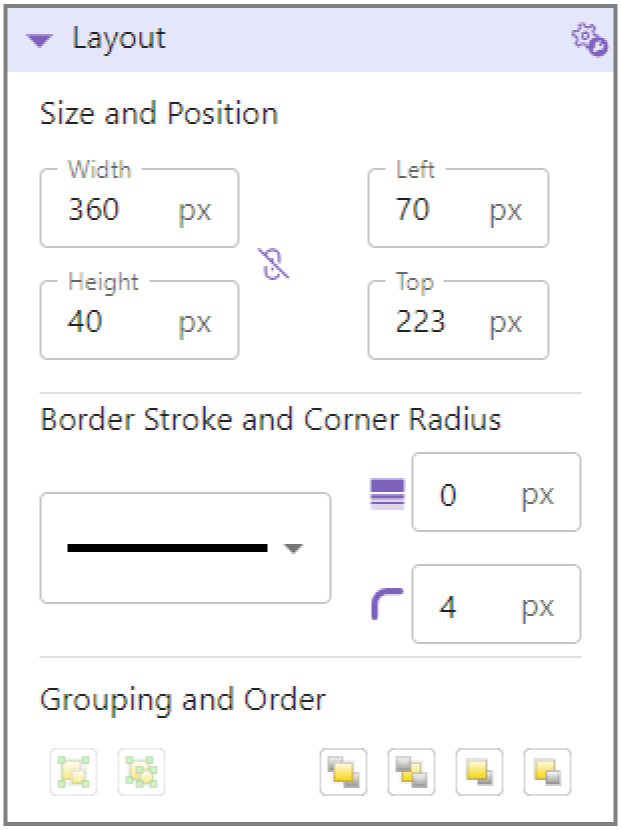
Note: If the content of a field is too large to display within the field's configured area, the field will only display the text that is visible within its boundary. It is recommended to adjust the field size, content, or font size to display the entire content within the field's area. For the **Text Area field**, a scroll bar will appear on the right-hand side that allows you to scroll and see any text that is not visible within the field's boundary.

Field Label Position

These options modify the position of the field label, relative to the field itself.

- **Label on top of field** - The label is outside and above the field.
- **Label to left of field** - The label is outside the field, on the left.
- **Label to right of field** - The label is outside the field, on the right.
- **Label below the field** - The label is outside and below the field.
- **Label inside top of field** - The label is within the field border, along the top.
- **Label within top border of field** - The label is in line with the field border, on the top. This option is selected by default.

Layout



These options modify various aesthetic aspects of a field or tool.

Size and Position

These options modify the positioning of the field or tool.

- **Width** - The size of the field or tool measured horizontally. This value can be locked with Height to maintain field or tool size ratios.
- **Height** - The size of the field or tool measured vertically. This value can be locked with Width to maintain field or tool size ratios.
- **Left** - The position of the left-most edge of the field or tool.
- **Top** - The position of the top-most edge of the field or tool.
- **Rotation Angle** - The angle of the field or tool measured from 0-360 degrees.

Border Stroke and Corner Radius

These options modify the visual design of the field or tool.

- **Line style** - Select from one of several line style options.
- **Stroke thickness** - The width in pixels of the line.

- **Corner radius** - The size in pixels of the rounded corners. Note that a value of 0 results in right angle corners.

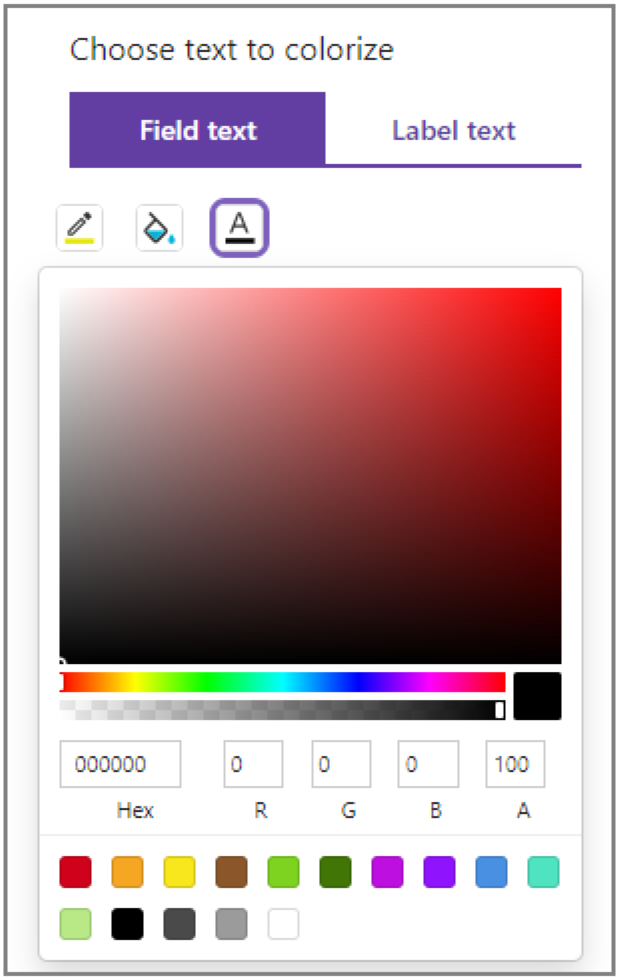
Grouping and Order

These options modify the grouping and order of the selected fields or tools.

- **Grouping** - To simultaneously perform a function (for example, move or resize) on multiple fields or tools on the canvas, use the Grouping feature.
    - **Group** - This button groups together all of the selected objects. It is active only if multiple fields or tools are currently selected on the canvas. To select multiple fields or tools, hold down the CTRL button (or Command button for iOS users), then select the objects you would like to group.Then, click on the **Group** button. You can select a single field or tool within a group by double-clicking it. After deselecting the group, selecting any field or tool in the group will select the entire group. For more information about modifying grouped fields or tools, see the section on **multi-selection**.

      Important: If you include one or more locked fields or tools in a group, they will be movable as part of the group.
    - **Ungroup** - This button ungroups the selected groups, allowing the fields and tools to be modified individually again. The button is active only if one or more field or tool groups are selected on the canvas.
- **Ordering** - “Ordering” is the layered placement of a field or tool in relation to other fields or tools on the canvas. a field or tool that is placed on a higher layer will block the view of any portion of a field or tool beneath it. Use the Ordering buttons to arrange the layering placement of overlapping fields or tools on the canvas.

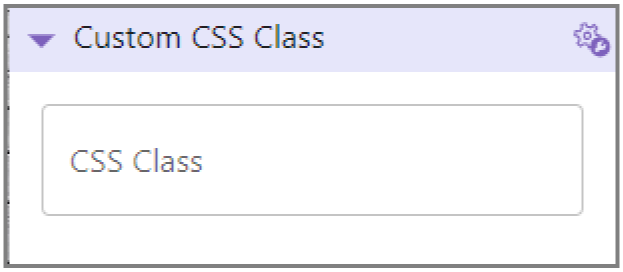
Color



These options modify the hue and saturation associated with a particular field or tool, and can modify either the **Field text**, which affects anything entered by a user in the field, or the **Label text**, which modifies the text associated with the field, such as the field title.

- **Line Color** - The color of any lines within the field or tool.
- **Fill color** - The background color of the field or tool.
- **Text color** - The color of any text within the field or tool.
- **Color picker** - A tool that allows you to pick from over 16,000,000 possible colors. Several preset options are available.
- **Opacity** - The amount of transparency of the field or tool. A transparency value of 0 means the field or tool is invisible.
- **Color values** - The hex and RGB values for the selected color.

Custom CSS Class



This field allows you to modify an attribute used to define a group of HTML objects in order to apply unique styling and formatting. This will only affect the selected object or objects, not the form as a whole. Modifying certain classes can affect part or all of a field or tool:

Class/Div	Modifies
Text Field	
.kmbs-form-control	Full container div
.kmbs-text-field	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-label-outlined	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field
.kmbs-outlined-input-border	Field outline border
Text Area	
.kmbs-form-control	Full container div
.kmbs-text-field	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-label-outlined	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field
.kmbs-outlined-input-border	Field outline border
Number Field	
.kmbs-form-control	Full container div
.kmbs-text-field	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-label-outlined	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field

Class/Div	Modifies
.kmbs-outlined-input-border	Field outline border
Attach File Field	
.kmbs-form-control	Full container div
.label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-label-outlined	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field
.kmbs-input-adornment	Icon within field
Date Field	
.kmbs-form-control	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-label-outlined	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field
.kmbs-input-adornment	Icon within field
Checkmark	
.kmbs-form-control	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-form-group	The group of checkboxes
.kmbs-checkbox	Checkbox control
svg	Combine with .kmbs-checkbox to change the properties of the checkbox
.kmbs-control-label	Label for each checkbox
Radio Button	

Class/Div	Modifies
.kmbs-form-control	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-form-group	The group of radio buttons
.kmbs-checkbox	Radio button control
.kmbs-control-label	Label for each radio button
Dropdown List	
.kmbs-form-control	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-input-label	Label
.kmbs-input-base	Text input field
.kmbs-outlined-input	Text input field
.kmbs-outlined-input-border	Field outline border
svg	Dropdown arrow icon
Button List	
.kmbs-form-control	Full container div
label	Main identifier for label
.kmbs-form-label	Label
.kmbs-form-group	The group of buttons
.kmbs-list-button	Button element
Shapes (Circle, Square, Star, etc.)	
/[Custom Class/]	Style
svg	Width, overflow, height, viewBox, fill, preserveAspectRatio
path	Vector-effect, transform, stroke, stroke width
Canvas	
&	Form page
Text Tool	

Class/Div	Modifies
class	Style

Notes:

- When referencing the field by .kmbs-input-base or .kmbs-outlined-input, in order to change the text in the field or the actual field color, you will still need to reference “input”, as well.
- When referencing the icon with .kmbs-input-adornment, the icon with the field is an image. Modifying the CSS will not change the image, but it can apply a filter.

Custom CSS Class Examples

How do I change the color of one text field border and label?

1. Select the field that you would like to customize. Add a class name to the CSS Class field in the Properties panel. This example will call that class “mytext”.
2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

   To make the label text blue:

   ```
   .mytext label {
       color: blue;
   }
   ```

```
To make the field border a light blue:
```

```
.mytext .kmbs-outlined-input-border {
    border-color: cyan;
}
```

How do I make all field labels have bold text?

1. Since we want all fields changed, there is no need to enter a custom CSS class.
2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

   To make all label text bold:

   ```
   label {
       font-weight: bold;
   }
   ```

Note: There is no “.” before “label”. This is because we are setting the style for the actual element and not a class.

How do I apply a background color to a text field?

1. Place the Text field on the form and give the item a “CSS Class”. This example will call that class “color-field”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

```
.color-field .kmbs-outlined-input-border  {
    background-color: cyan;
}
```

How do I style the text next to checkboxes?

1. Place the Checkbox field on the form and enter values for each box. Give the item a “CSS Class”. This example will call that class “mychecks”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

```
.mychecks label .kmbs-checkbox-label  {
    color: cyan;
    font-style: italic;
}
```

How do I change the color and spacing of radio buttons?

1. Place the Radio Button field on the form and enter values for each option. Give the item a “CSS Class”. This example will call that class “myradio”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

```
.myradio .kmbs-checkboxes  {
    color: green !important; /* radio buttons (selected/not selected) will be green */
                         }

.myradio label  {
       padding-top: 12px !important; /* adds spacing between vertically stacked radio bu
}
```

Note: Each radio button style must end with `!important` in order for it to take effect.

How do I style text in the Text tool?

1. Use the Text tool to place some text on the form. Enter your desired text and then give the item a “CSS Class”. This example will call that class “big-red”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

3. Since this is called “big-red”, we will increase the font size and make the text red

```
.big-red {
    font-size: 48px !important;
    font-weight: bold !important;
color: red !important;
}
```

Note: Each style must end with “!important” in order for it to take effect.

How do I change the colors of shapes?

1. Give each shape a custom class. If you would like every shape to use the same colors, give each one the same class name. In this example, we will give all shapes a class called “default-shape”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS.

3. To give the shapes a different fill color, we reference the SVG which draws the shape on the form:

```
.default-shape svg {
        fill: #048562; /* dark teal */
}
```

4. To give the shapes a different border, we reference the path within the SVG shape

```
.default-shape svg path {
        stroke: #8c05b8; /* bright purple */
        stroke-width: 8px; /* made the border thicker */
}
```

How do I make the asterisk on required fields to display in red?

This example is more complex. Since we want to change a single character in a line of text, it goes beyond a simple selection and property change. Even so, the way to accomplish this is straightforward.

1. Select the field that you would like to customize. Add a class name to the CSS Class field in the Properties panel. This example will call that class “required-field”.

2. In the Custom CSS editor at the bottom left of the form builder, enter your CSS. To make the asterisk display red:

```
.required-field label::after {
        bottom: 0;
        color: red;     /* Any desired color value can be given here */
        content: '';     /* This is the character we want to change the color of */
        position: absolute;
        transform: translate(-100%, 0);
}
```

Note: There is no “.” before “label”. This is because we are setting the style for the actual element and not a class.

Context Menu

You can right-click on a field or tool to open a context menu with additional options. Options include:

- **Clone** - Create an exact duplicate of the field or tool.

Note: Cloning a field or tool with a variable will automatically update the Variable Name field to avoid issues with metadata overlap.

- **Lock/Unlock** - Lock the position and size parameters of a field or tool. When selected, a locked field will display a small lock icon in the upper left corner of the field or tool. This is positional only, for use with nodes and drawing fields or tools; it has no effect on the attributes of the node.

  Caution! Even if a field or tool is locked, it can still be deleted. The “locking” is only positional with regard to the work area.

- **Delete** - Remove the field or tool from the canvas.

Multiple Selections and Grouping

When creating an Advanced form, you can select more than one field or tool at a time, allowing you to modify these fields or tools simultaneously. To select multiple fields or tools, do the following:

1. Select a field or tool.
2. Hold down the **Ctrl** key for Windows users or the command key for iOS users.
3. Select any additional fields or tools.

Selecting multiple fields or tools enables the **Group** button in the menu, which essentially saves the selection of multiple fields or tools.

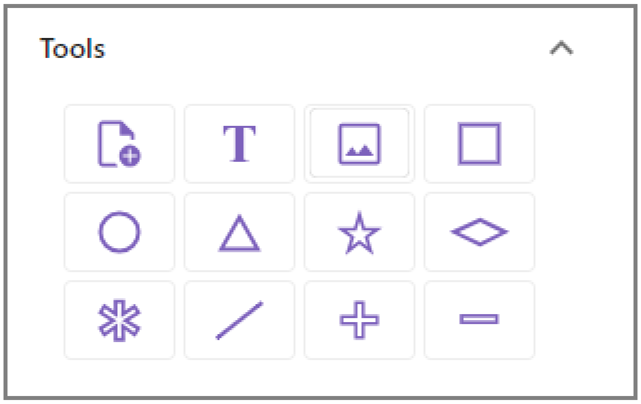
Multiple Selection Properties

The Field Properties Panel displays all of the style options available that the selected fields or tools have in common. For example, selecting two **Text Line** fields will give you the option to modify Text Styling; Field Label Position; Layout; Border Stroke and Corner Radius; Grouping and Order; Line, Fill, and Text Color; and Custom CSS. Selecting a **Text Line** and an **Asterisk** will give you the option to modify Layout; Border Stroke and Corner Radius; Grouping and Order; Line and Fill Color; and Custom CSS.

Tools

Advanced Forms Only

The Tools area appears in the **Fields panel** below the Standard Index Field icons. This area contains shapes and other elements you can add to your form to enhance its appearance and organize its content. Tools differ from Standard Index Fields in that they do not accept user input (outside of initial configuration) and or produce metadata. They are purely stylistic.



All tools have the same **stylization options** described above.

Tools include:

- Add Page - Add an additional page to the end of the form.
- Text - Add text to your form that is not associated with a field. For more information, see the **Text** section below.
- Image - Add an image to your form. For more information, see the **Image** section below.
- Square - Add a square to your form.
- Circle - Add a circle to your form.
- Triangle - Add a triangle to your form.
- Star - Add a star to your form.
- Diamond - Add a diamond to your form.
- Asterisk - Add an asterisk to your form.
- Line - Add a line to your form.
- Plus - Add a plus to your form.
- Minus - Add a minus to your form.

Text

To add text to your form, you can drag and drop the **Text** tool icon to the Form Builder Canvas area. To customize its properties, select the newly created field. You can add text to the Text Tool in the field provided in the Field Properties Panel.

Note: The Text tool is different from the **Text Field** in that it is not editable within the form; the Text tool simply displays text.

Image

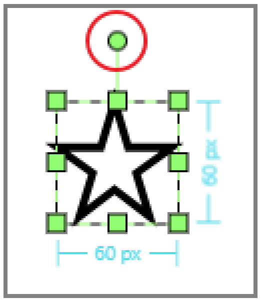
To add an image to your form, you can drag and drop the **Image** tool icon to the Form Builder Canvas area. To customize its properties, select the newly created field. You can browse for an image by selecting the **Select an Image** button in the Field Properties Panel. This will open a Windows-style folder browser for you to upload an image.

You can adjust the **Opacity** of the image using the slider, which represents how much can be seen behind the image. For example, 100% opacity is a solid image; 0% opacity is invisible.

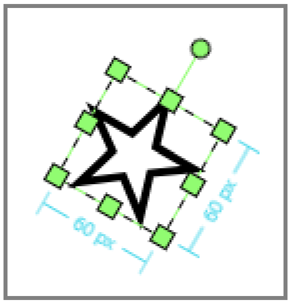
Rotation

You can select and rotate any of the Tools on the form builder canvas. To rotate a field or tool, do the following:

1. Select the field or tool you would like to rotate. The bounds of the field or tool will be highlighted in green.
2. Select and hold the circle above the field or tool.

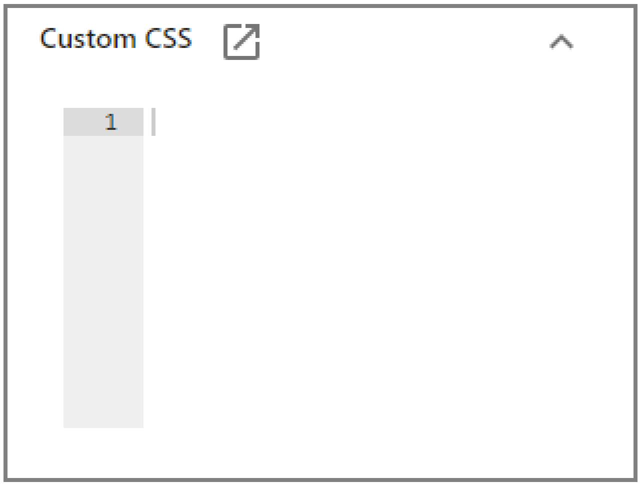


3. Drag the circle to rotate the field or tool.
4. When you have rotated the field or tool to the orientation you want, release the circle.



You can also rotate a field or tool using the **Rotation Angle** setting in the Field Properties panel.

Custom CSS



You can use this area to write customized CSS code that will affect the fields or tools in the form.

Important! The CSS code added here will only affect form fields or tools that have a defined **Custom CSS Class**.

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.

Canvas Properties Panel

Grid Settings

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

- **Spacing** - Use this slider to specify the space between grid lines on the canvas.
- **Zoom** - Use this slider to specify the size of the canvas view relative to its actual appearance.
- **Show/Hide Grid** - Use this toggle button to show or hide the grid.
- **Snap to Grid** - Use this toggle button to “snap” fields or tools to the nearest grid line, or to turn off Snap to Grid for the workflow. Snap to Grid applies to new fields or tools you add to the canvas, or to existing fields or tools 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 fields or tools on the canvas.

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. Click on the canvas where no fields or tools are selected to open the Properties panel.
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 fields or tools on the canvas.

Once uploaded, you have the following configuration options:

- **Opacity** - Use the slider bar to change the opacity of the image.
- **Positioning** - Define where to position the image. You have the following options:

- **Fit to Canvas** - Stretch the selected image to fit the canvas size.
- **Center** - Place the selected image in the center of the canvas. Note that if the image is not the same size as the canvas, there may be white space around the image or the image may be cropped.

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. When no field or tool is selected, modifying the Color will change the canvas background color.

Adding Fields or Tools to the Work Area

You can begin adding fields and tools 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

When creating a Standard form, each index field includes a **Duplicate** button above it once it has been added to the canvas. To duplicate an index field from your form, select that **Create a duplicate field** button.

When creating an Advanced form, index fields and tools can be duplicated using the **context menu**, which can be accessed by right-clicking on the field or tool.

Deleting Fields or Tools

When creating a Standard form, 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.

When creating an Advanced form, index fields and tools can be duplicated using the **context menu**, which can be accessed by right-clicking on the field or tool.

Moving Fields or Tools Around the Work Area

When creating a Standard form, 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.

When creating an Advanced form, you can simply click and drag the field or tool to its new location.

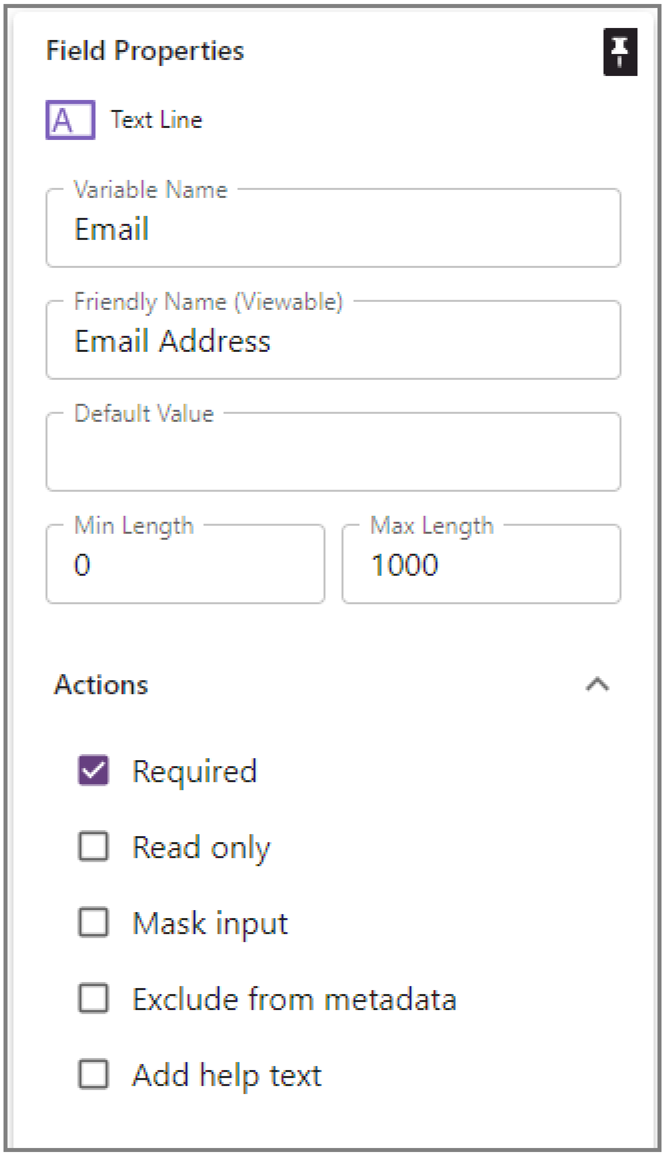
Configuring Fields or Tools

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.

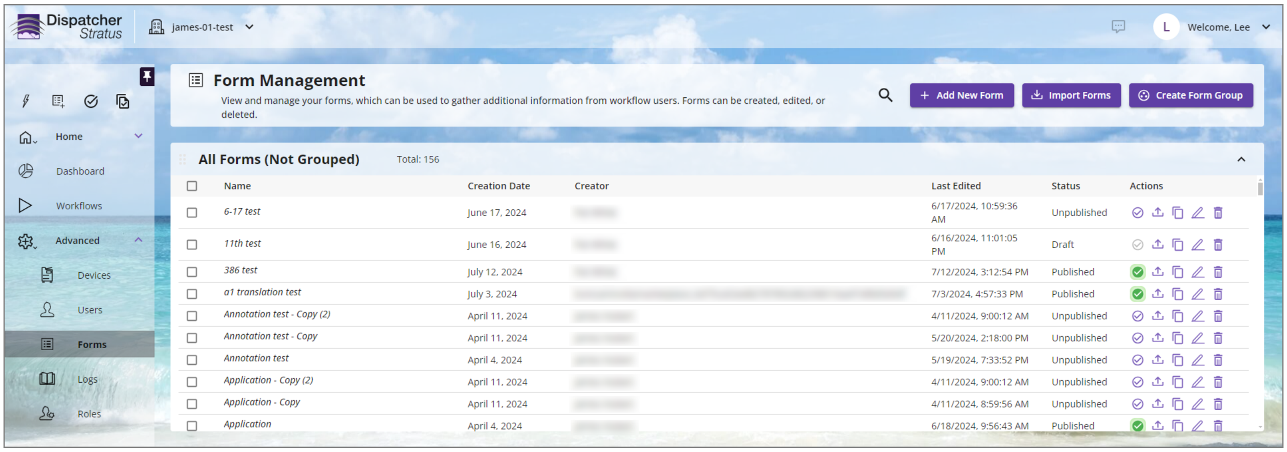
Form Management

Dispatcher Stratus 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.

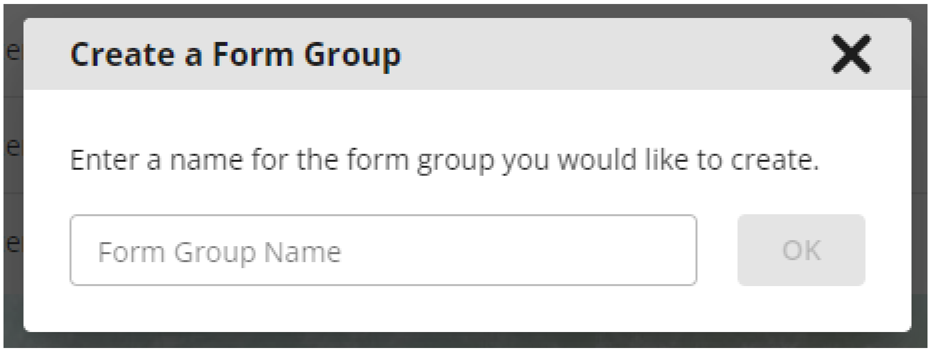
Note: Forms can belong to only one group at a time.

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.

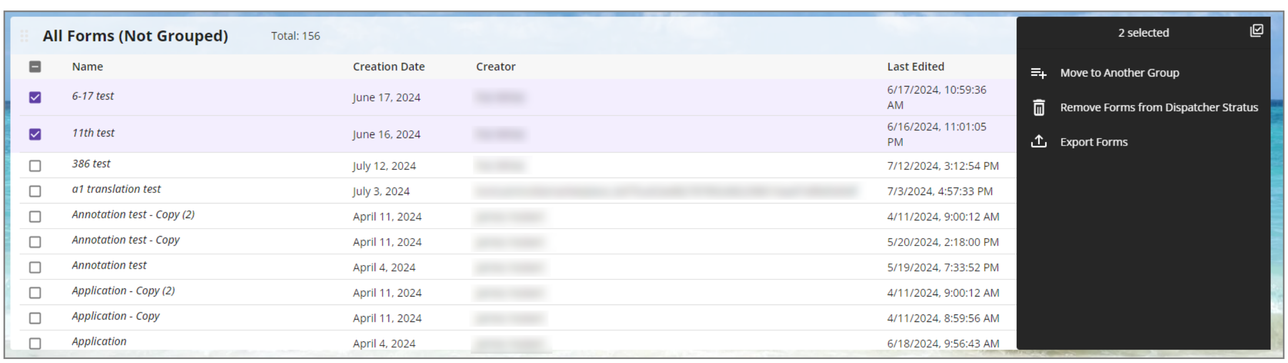


2. Enter a name for the form group, then click **OK**.

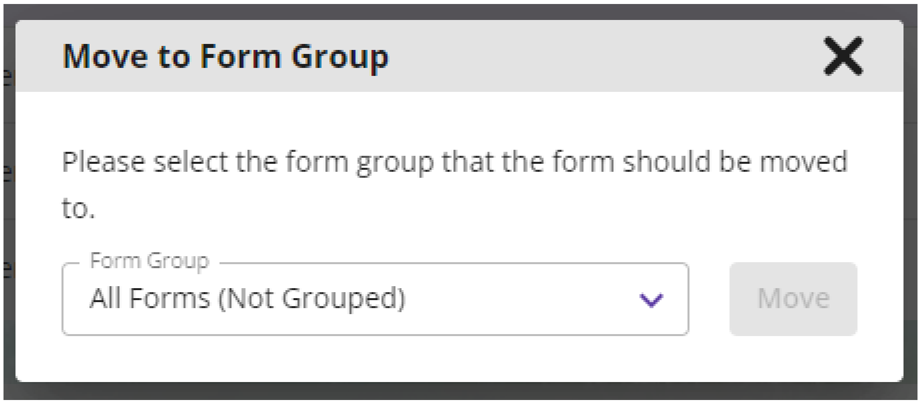
Adding Forms to a Form Group

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)**.

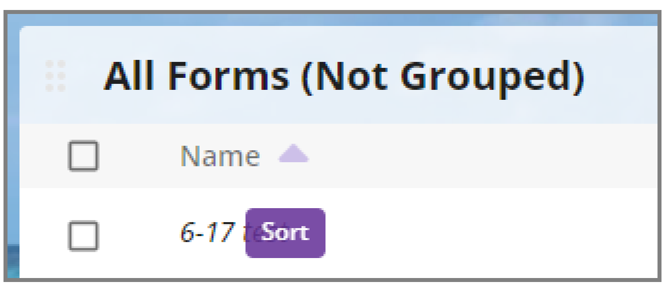
Edit a Form Group

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.

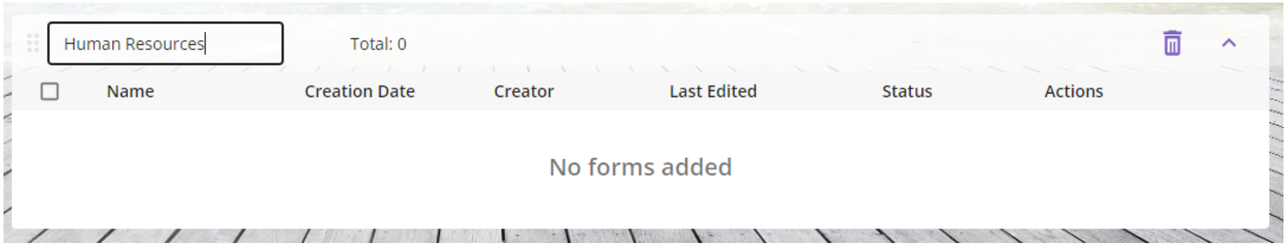


2. To sort in the reverse order, click the arrow again.

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.

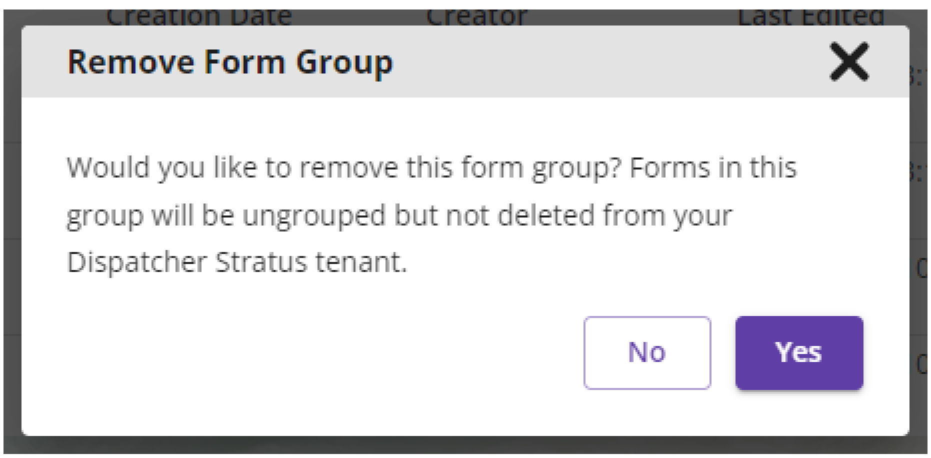
3. Press the Enter/Return key; the name will be saved automatically.

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.
- When you unpublish a form, it will still be available in existing **Jobs**. If a user attempts to access or submit a form via an **External Form** or **Internal Form** while a form is unpublished, the user will be notified that the form is no longer available.

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)

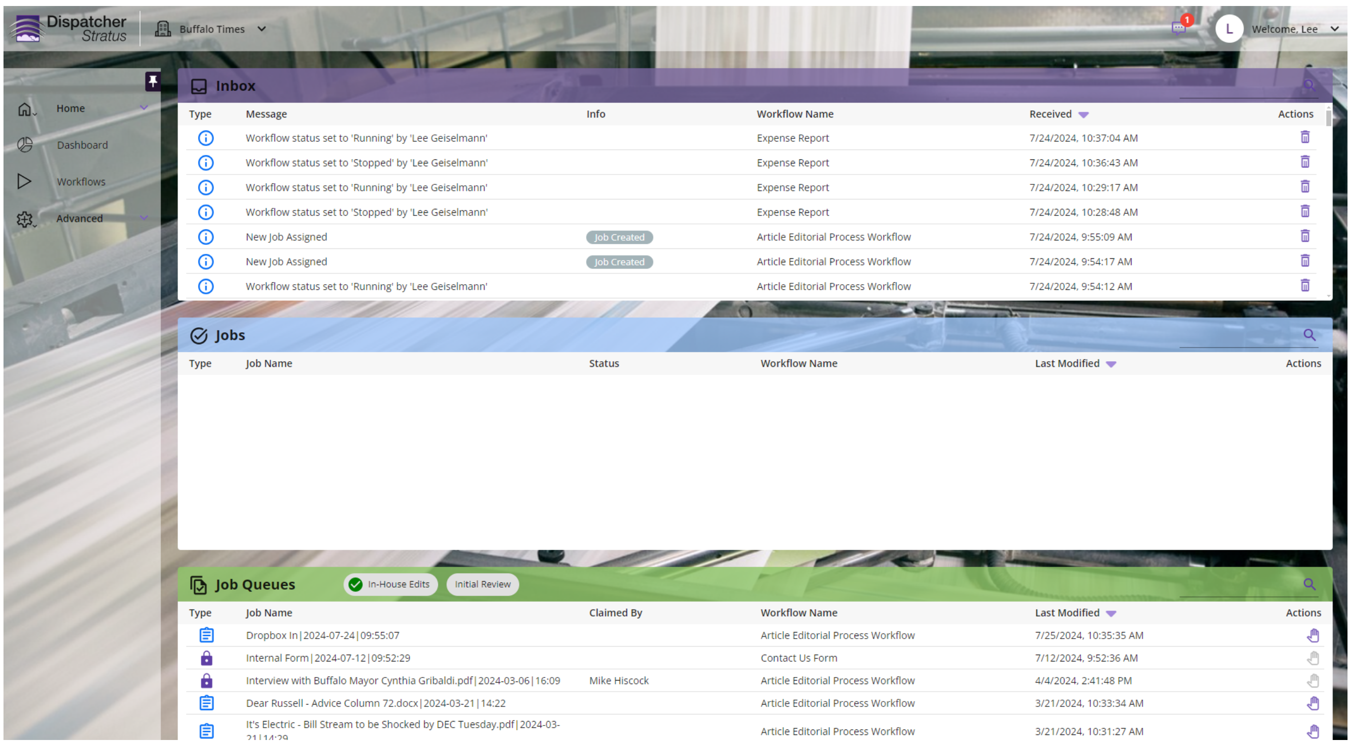
Selecting one or more forms brings up a context menu on the right-hand side of that form group.

Actions you can perform on the forms include:

- Move to Form Group
- Remove Forms from Dispatcher Stratus
- Export Form

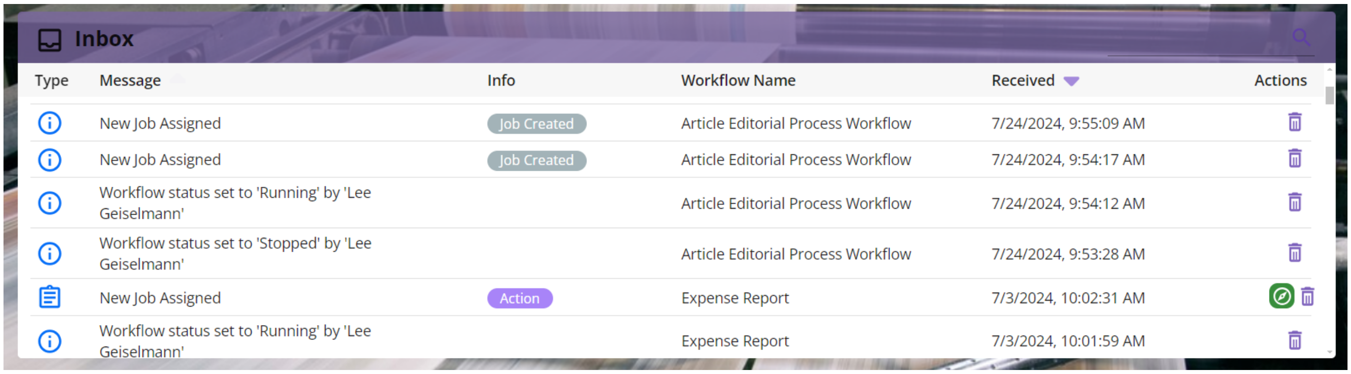
Home

After logging in to Dispatcher Stratus, you will be directed to the tenant Home page. This page provides an overview of information available on the **Inbox**, **Job Queue**, **Tracker**, and **Jobs** pages.



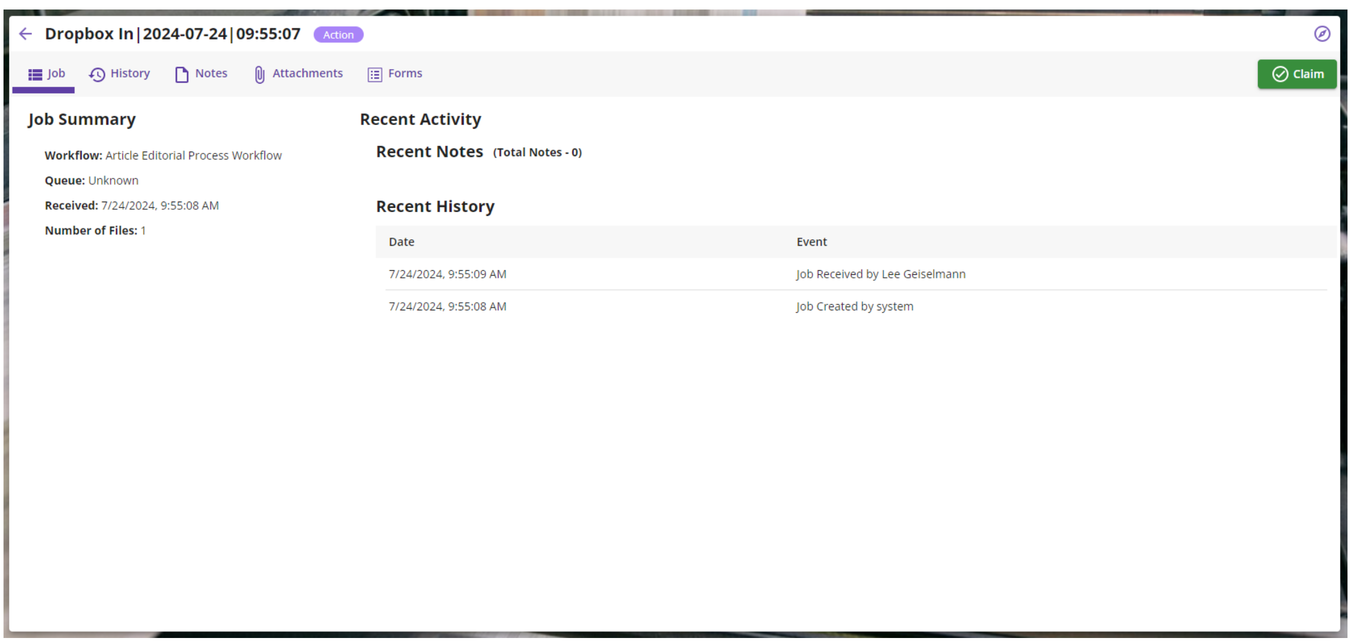
Inbox

The Inbox area displays information about items in your **Inbox**. This provides an at-a-glance overview of jobs, notifications, and processes associated with your tenant’s workflows. Clicking on an information or Error notification will open a dialog window with additional information, and clicking on a Job will take you to the Jobs page to view detailed information about that task. The Inbox is the primary location for information about workflows, including when new jobs enter workflows, errors in processing, etc.



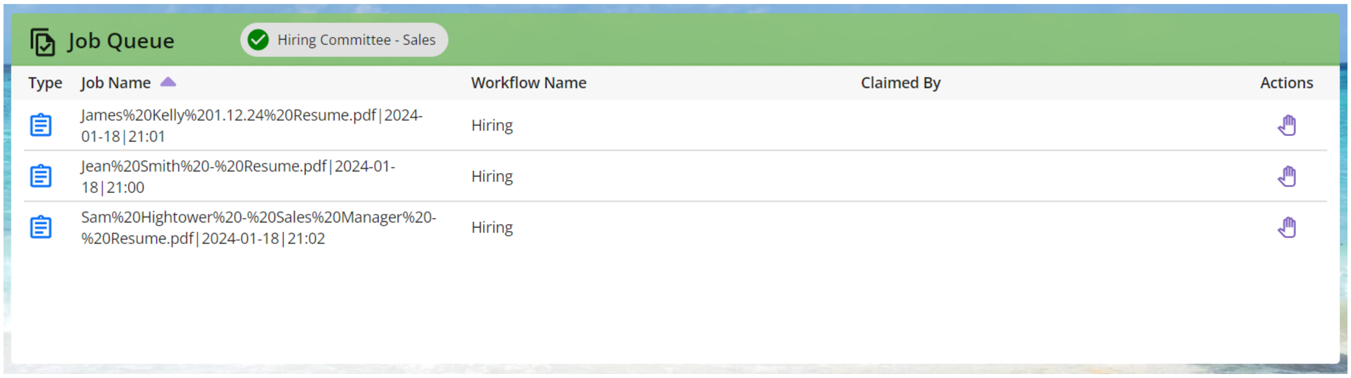
Jobs

The Jobs area displays detailed information about tasks within Dispatcher Stratus. Typically, jobs are only accessible by the user they are assigned to, though jobs that have been added to your **Tracker** can be viewed as well. Jobs are the primary method by which users interact with tasks within Dispatcher Stratus. Clicking on a job will take you to the **Jobs** page to view detailed information about it.



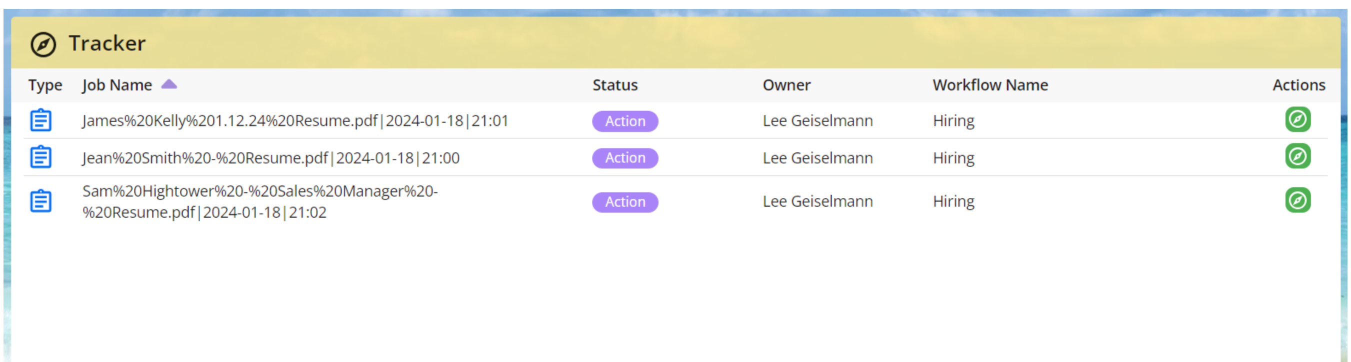
Job Queue

The Job Queue area displays information about the **Job Queues** you are a member of. Jobs in a queue are visible by anyone with access to that queue until they are claimed by a user. The queue that is displayed is indicated by a green checkmark .



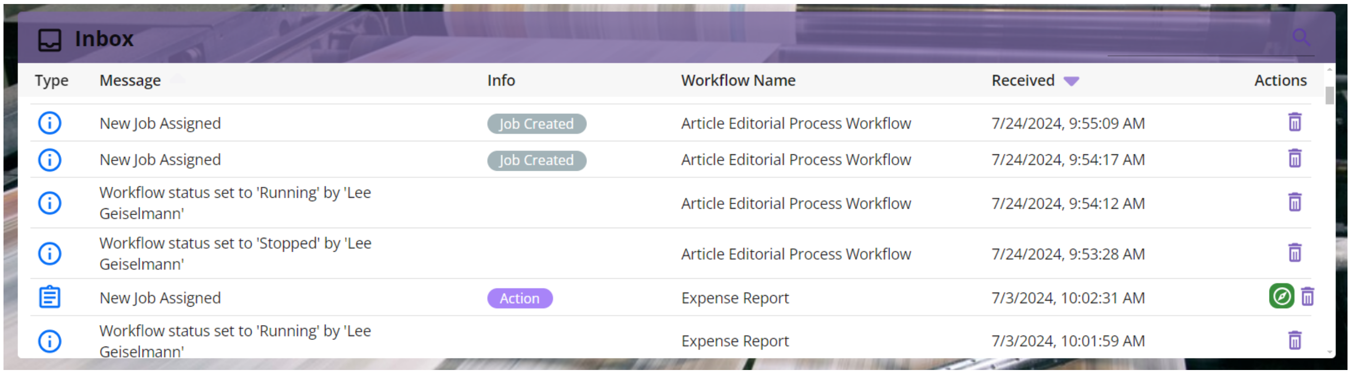
Tracker

The Tracker area displays information about the jobs you have selected to continue watching after you are no longer the owner. This allows you to follow the progress of jobs and documents through a workflow to continue to interact with the job via **Notes**, modify **Forms**, ensure timely completion of jobs, and more. Clicking on an item in the Tracker area will take you to the Jobs page to view detailed information about it. Information can also be found on the **Tracker** page.



Inbox

The Inbox functions as a repository within Dispatcher Stratus for jobs, notifications, and processes associated with your tenant’s workflows. Clicking on an information or Error notification will open a dialog window with additional information, and clicking on a Job will take you to the Jobs page to view detailed information about that task. The Inbox is the primary location for information about workflows, including when new jobs enter workflows, errors in processing, etc.

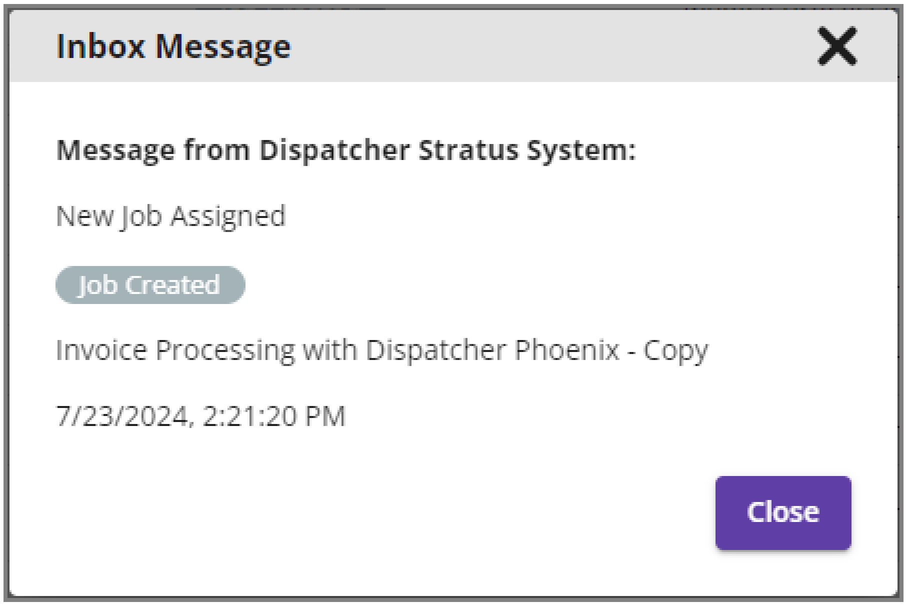


After navigating to the page, you will see a table with the following information:

- Type - This column describes what kind of notification it is.
    - Document - Related to workflows and usually includes an action that needs to be taken.
    - Information - Workflow updates and additional facts, such as “Job Created”, “Attention”, etc.
    - Error - Problems, usually with workflows, that should be reviewed.
- Message - A short description of the item.
- Info - The action you need to take.
    - Action - You need to take some action to move the job to the next step in the workflow.
    - Approval - You need to approve the job and send it to the next step in the workflow or deny it.
    - Attention - Something needs your attention or to be reviewed.
- Workflow Name - The name of the workflow that generated the item.
- Received - The date and time the job reached your Inbox, based on your selected time zone (See **Settings**).
- Actions - The actions available to you.
    - Track/Untrack - Add or remove this job item to your **Tracker**.
    - Delete - Remove this item from your Inbox.

      Important! Items deleted from the Inbox are lost and cannot be retrieved.

Clicking on an item will give you more details. After clicking on a document or job, the **Jobs** page for that job will open. After clicking on an Information or Error notification, a small window will appear with additional information about it.



The Inbox has a Search field, located in the upper-right hand corner of the screen. The field filters the contents of the Inbox using type-ahead technology, meaning that results are updated as you type. The Search field searches through every column of data available.

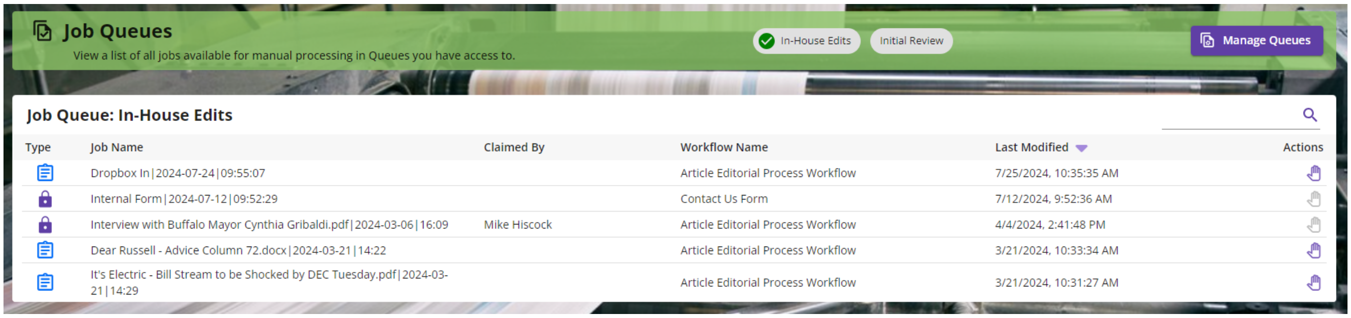
Job Queue

The Job Queue page displays information about the Job Queues you are a member of. The queue that is displayed is indicated by a green checkmark in the header. Job Queues differ from **Jobs** in that they do not automatically have an assigned owner; they can be claimed by anyone with access to the queue. Examples of common Job Queue uses include:

- Job applications - Applications can be reviewed by any member of the HR team
- Contest submissions - Users submit entries to a contest, where the submissions wait until the end date. Then, queue users can compare all submissions at once.
- Help tickets - All help tickets are sent to a central queue, where individual members of the IT team can claim tickets they are most comfortable handling.
- Backlog items - Issues are added to a queue for developers to handle as they have time between other assignments.

Notes:

- Job Queues are displayed alphabetically; the alphabetically first Job Queue will always be displayed when you navigate to the page, even if you selected a different queue earlier in the same session.
- If a job remains in the system for 365 days, it ceases to be viable and can no longer progress through Dispatcher Stratus.



After navigating to the page, you will see a table with the following information:

- Type - This column describes what kind of item it is. This column displays a lock icon when a job has been claimed by another user.
  - Document - Related to workflows and usually includes an action that needs to be taken.
- Job Name - A short description of the item. Job names contain the following elements: Document Name | Date Received | Time Received
- Claimed By - The name of the user who has signaled that they will take the next action for this job.
- Workflow Name - The name of the workflow that generated the item.
- Last Modified - The last time a user made an update to the job, based on your selected time zone (See **Settings**).
- Actions - The actions available to you.
  - Claim - Claim the job as your own.
  - Unclaim - Unlock the job so anyone with access to the queue can claim it for themselves.

You can search through the available jobs using the Search field in the upper-right corner. The Search function includes every column provided when searching.

After clicking on a job queue item, the jobs will open, providing you with additional information.

Job

The Job area contains a summary of the job, including:

- Workflow - The name of the workflow that generated the job.
- Received - The time the job was received.
- Number of Files - The total number of files associated with the job.
- Recent Notes - The most recent notes left on the job.
- Recent History - The most recent changes in the job's history.

History

The History tab shows all of the log information associated with the job since it was created. This information is displayed in a table:

- Date - The date and time the status of the job changed.
- Source - The source of the data. Typically this will either be “System” or a user’s name.
- Event - A short description of how the job’s status changed.

Notes

The Notes tab shows a history of all of the notes that have been added to a job. The notes are displayed in a table:

- Date - The date and time the note was added.
- Note - The text associated with the note.
- Author - The user who wrote the note.

If any notes are marked as Private, a Lock icon ( ) will display on the left side of the note.

Add a New Note

To add a new note, do the following:

1. Click the **Add Note** button in the middle of the Job area.
2. Enter the note text.
3. If you would like the note to be private (only visible to you), click the Private button.
4. Click the **Save Note** button.

Note: While notes cannot include attachments, files can be added to a job on the **Attachments** tab, described below.

Attachments

The Attachments tab includes all the files attached to the job. This information is displayed in a table:

- **Add Attachment** - This button allows the user to manually attach a document to the job.
- File Name - The name of the attached file.
- File Size - The size of the attached file.

- Uploaded By - The name of the user who attached the file.
- Date - The date and time the attachment was saved with the job.
- Actions - The available actions for the attachment.
    - Download - Save a local copy of the attached file.
    - Delete - Delete the attached file.
- Preview - An image of the document.

  Note: The preview function is restricted to:

    - PDF, PNG, JPG, and SVG file types.
    - 25 MB.

Forms

The Forms tab includes information about any forms attached to the job. This information is displayed in a table:

- Form Name - The name of the form that captured the information.
- Submitted by - The name of the user who submitted the form.
- Date - The date and time the form was saved with the job.

Note: When using Anonymous Authentication for the **External Form** or **Internal Form**, the “Submitted By” column will display “Unknown user.” To add a user, the workflow should be configured with an **Assign Owner** node before the **People Node**.

Claiming a Job

Jobs in a job queue are available for anyone with access to the queue to claim. To claim a job, do one of the following:

1. Navigate to the Job Queue page.
2. Select the Claim icon on the far right-hand side of the job.

OR

1. Navigate to the Job Queue page.
2. Select a job in a queue. This will open the job and display more detailed information.
3. In the upper-right hand corner, select the Claim button.

Once a job has been claimed, it cannot be modified by any other user and is treated like any other assigned job.

Completing a Job

After a job has been claimed, you can access it, view any of the listed information, and take any necessary actions, such as approving the job. To complete a job, do the following:

1. Navigate to the Job Queue or Jobs page.
2. Select the job you would like to complete.
3. After confirming the job, select the **Action** button in the upper-right corner of the Job.
4. A drop-down list will appear of all the available actions you can take. Select the next step in the workflow you would like the job to progress to. Note that options will only appear if the connection between the current People node and the next node is a **User Selectable** connection.
5. Select the **Done** button to send the job to the next step. You will be returned to the Job or Job Queue page, based on where you accessed the job from. You will no longer see the job in your Jobs or Job Queue (unless you are also assigned in the next People Node in the workflow), though the job will still appear in your Tracker, if you have previously added it there.

Jobs

The Jobs area displays detailed information about tasks within Dispatcher Stratus. Typically, jobs are only accessible by the user they are assigned to, though jobs that have been added to your **Tracker** can be viewed as well. Jobs are the primary method by which users interact with tasks within Dispatcher Stratus. Examples of common jobs include:

- Reviewing and approving content
- Assigning a job to another user (delegation)
- Performing a task within Dispatcher Stratus (Inviting a new user, updating or modifying information in an attached **form**, etc.)
- Performing a manual task outside Dispatcher Stratus (Setting up a meeting, making a phone call, setting up a new account, etc.)

Jobs are displayed in a table for easy viewing:

- Type - This column describes what kind of item it is.
  - Document - Related to workflows and usually includes an action that needs to be taken.
- Job Name - A short description of the item. Job names contain the following elements: Input Node Name | Date Received | Time Received, based on your selected time zone (See **Settings**). If a workflow diverges or splits, the “Input Node Name” portion of the Job Name will update to the name of the node where the split happened.
- Status - The next action that needs to be taken by the owner.

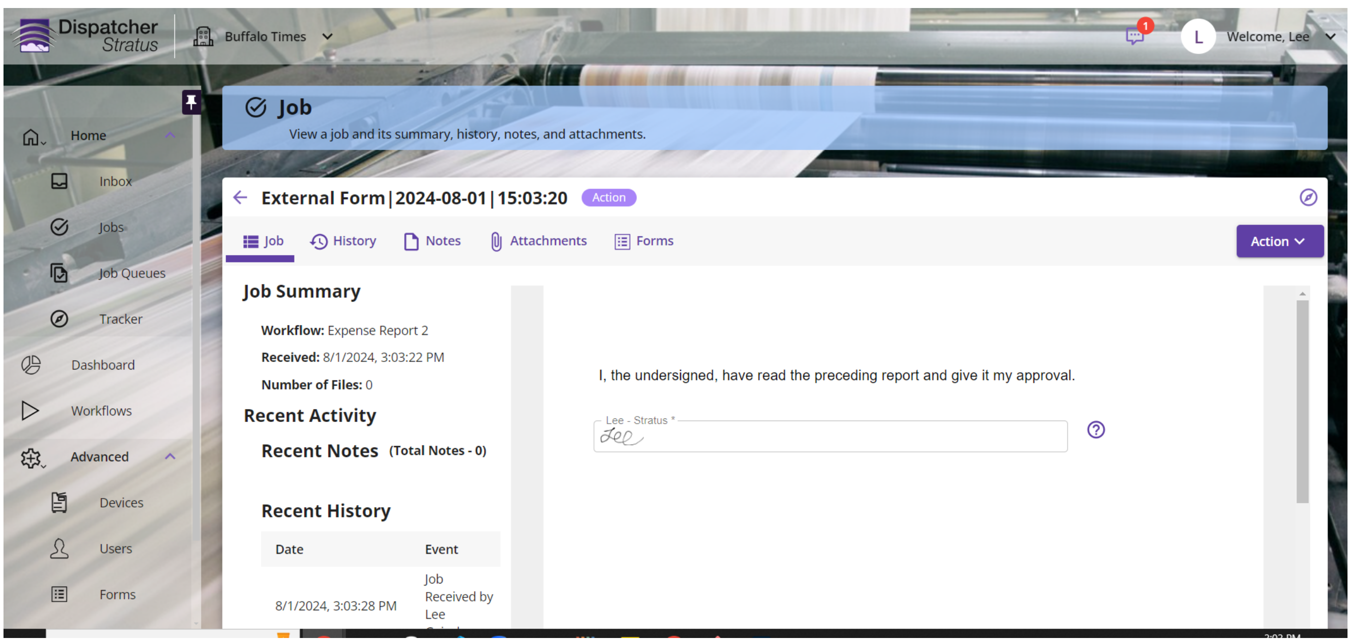
- Action - You need to take some action to move the job to the next step in the workflow.
- Approval - You need to approve the job and send it to the next step in the workflow or deny it.

- Workflow Name - The name of the workflow that generated the Job Queue item.
- Last Modified - The last time a user made an update to the job, based on your selected time zone (See **Settings**).
- Actions - The actions available to you.
  - Track/Untrack - Add or remove this job item to your **Tracker**.
  - Delete - Remove this item from your Jobs.

    Important! Items deleted from your Jobs are lost and cannot be retrieved.

  Notes:

  - The Time Received in the Job Name is based on the tenant timezone settings.
  - If a job remains in the system for 365 days, it ceases to be viable and can no longer progress through Dispatcher Stratus.



You can search through the available jobs using the Search field in the upper-right corner. The Search function includes every column provided when searching.

Job

The Job area contains a summary of the job, including:

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- Received - The time the job was received.
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- Note - The text associated with the note.
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1. Click the **Add Note** button in the middle of the Job area.
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4. Click the **Save Note** button.

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- File Size - The size of the attached file.
- Uploaded By - The name of the user who attached the file.
- Date - The date and time the attachment was saved with the job.
- Actions - The available actions for the attachment.
  - Download - Save a local copy of the attached file.
  - Delete - Delete the attached file.
- Preview - An image of the document.

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Forms

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- Form Name - The name of the form that captured the information.
- Submitted by - The name of the user who submitted the form.
- Date - The date and time the form was saved with the job.

Note: When using Anonymous Authentication for the **External Form** or **Internal Form**, the “Submitted By” column will display “Unknown user.” To add a user, the workflow should be configured with an **Assign Owner** node before the **People Node**.

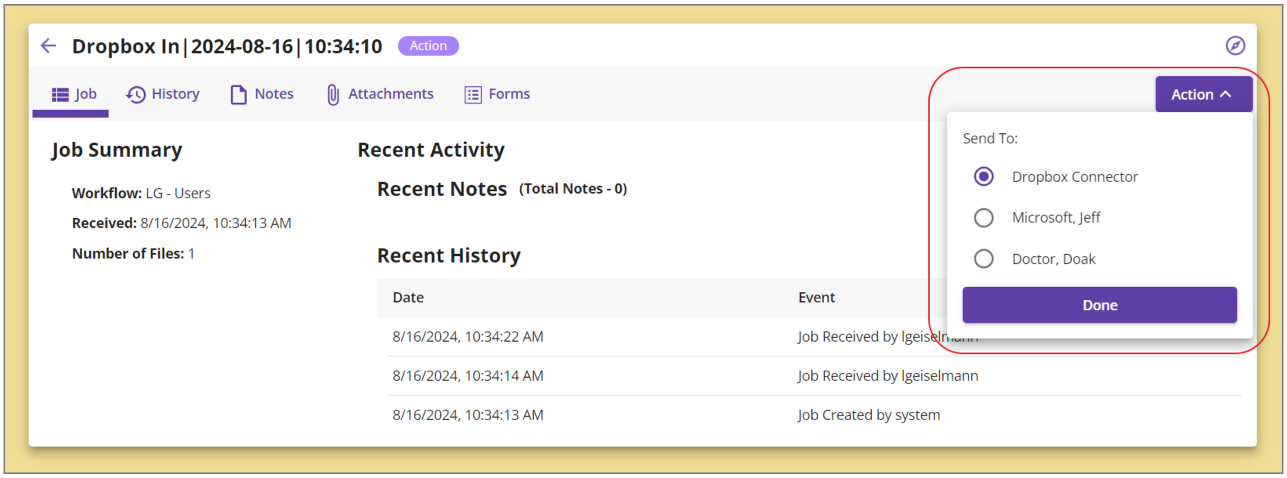
Completing a Job

After a job has been assigned to you, you can access it, view any of the listed information, and take any necessary actions, such as approving the job. To complete a job, do the following:

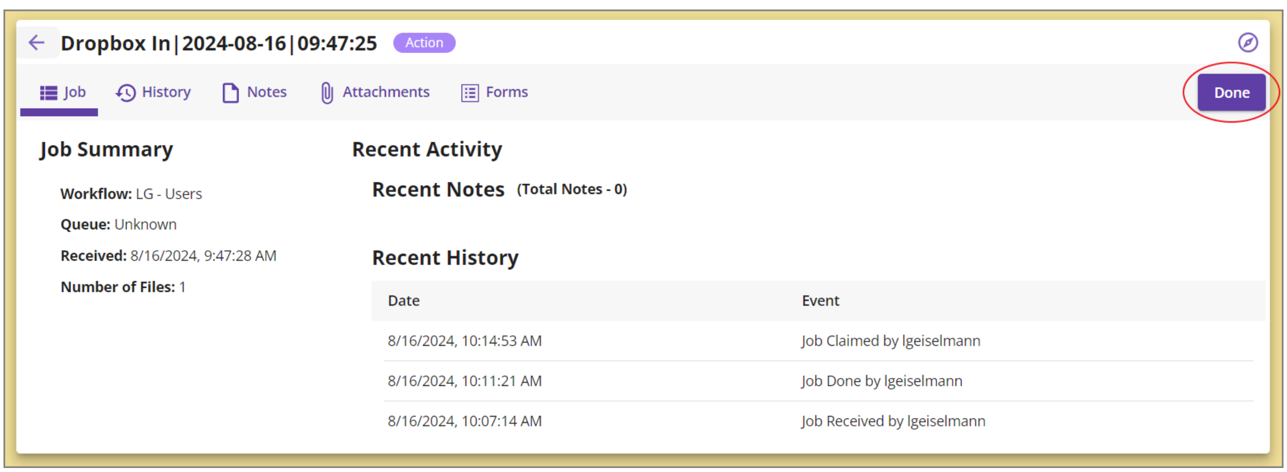
1. Navigate to the Jobs page.
2. Select the job you would like to complete. This will take you to a page with detailed information about that job (described **above**).
3. Complete the task associated with the job.

4. Select the appropriate button in the upper-right hand corner.

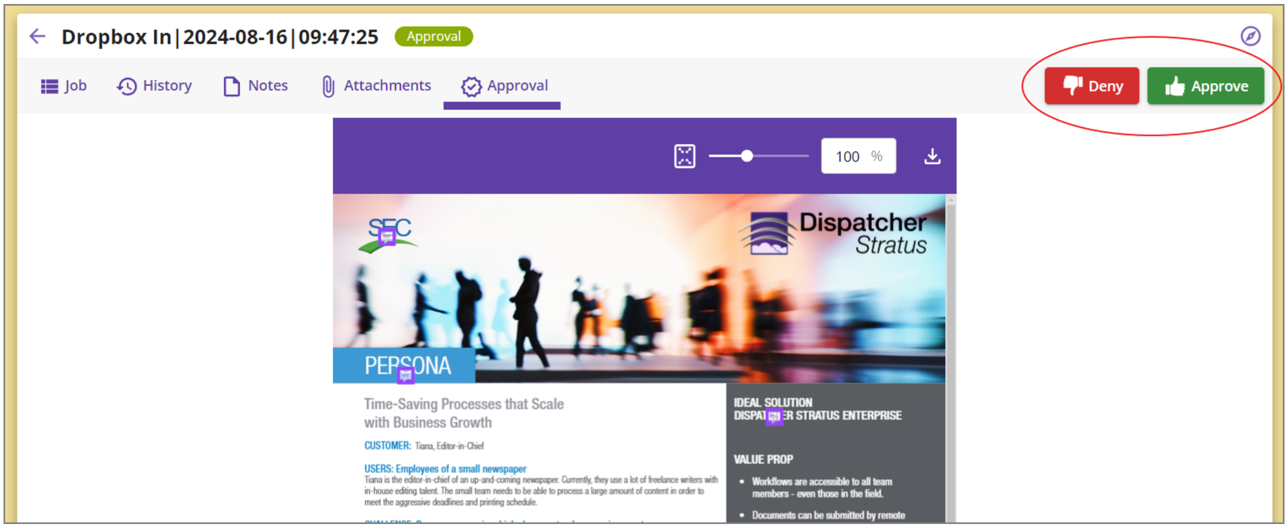
- For jobs from the **People User** node, created by the **People Queue** and already claimed, and created by the **User Group** where the workflow is configured with a **user-selectable connector** connecting to the next node, this button is labeled **Action**. Select the next destination for the job. Then, select the **Done** button to complete the job.



- For jobs where the workflow is configured with a **standard connector** connecting to the next node, this button is labeled **Done**. Select this button to complete the job.



- For Jobs created by the **People - Edit and Approve** node, there are two button: **Deny** and **Approve**. Select one to complete the job.



You will be returned to the Job or Job Queue page, based on where you accessed the job from. You will no longer see the job in your Jobs or Job Queue (unless you are also assigned in the next People Node in the workflow), though the job will still appear in your Tracker, if you have previously added it there.

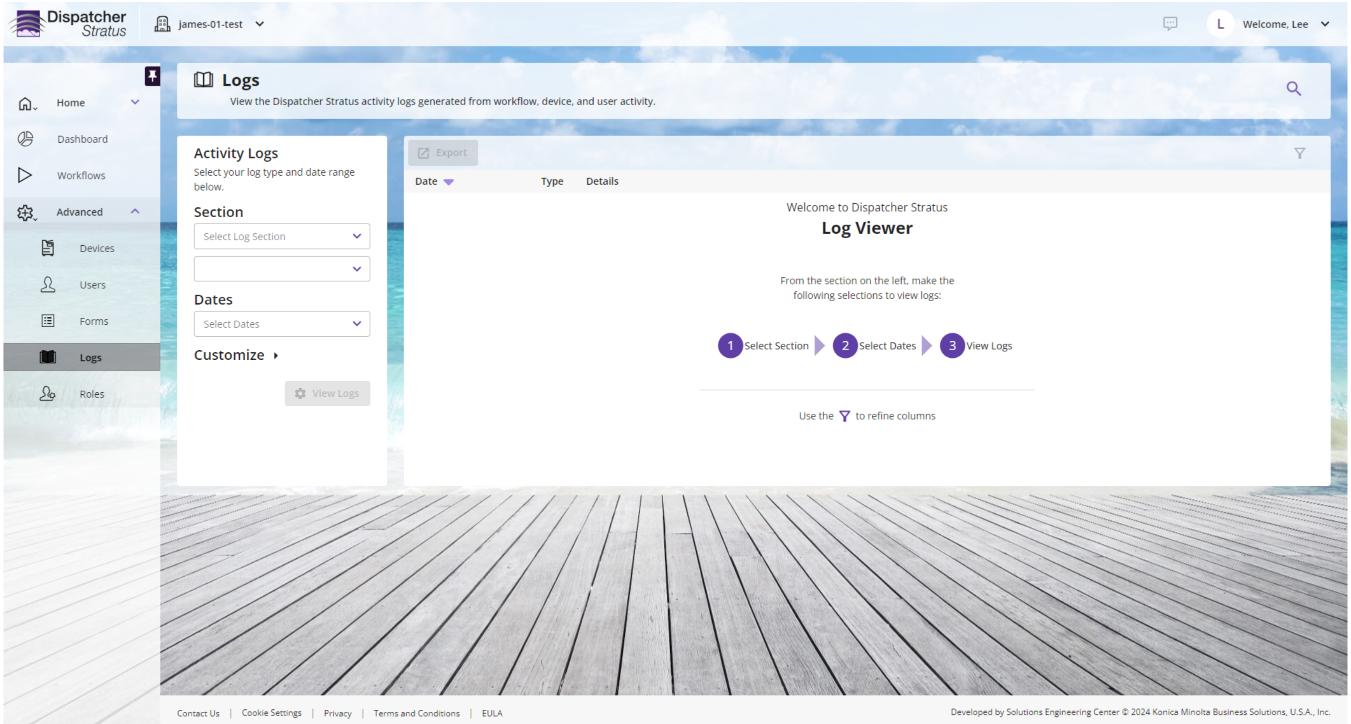
Logs

Dispatcher Stratus 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 Stratus 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 Stratus

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

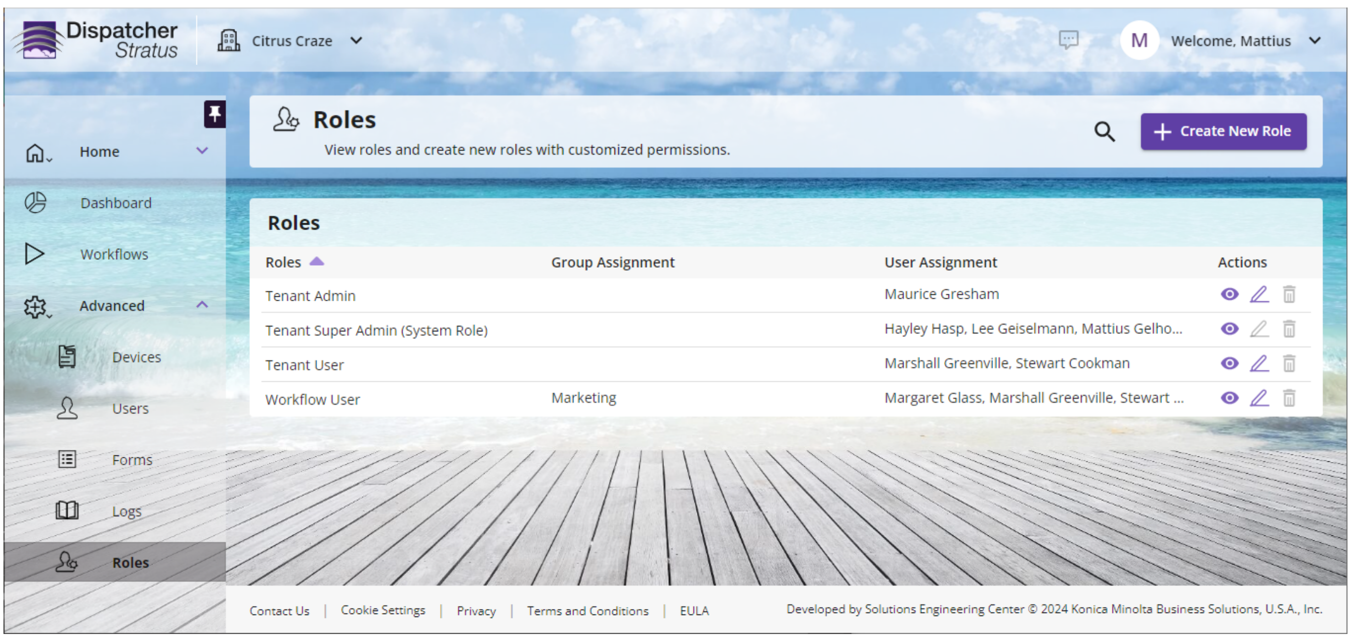
Log information is vital for monitoring systems and troubleshooting issues that arise. A typical user will not need access to logs. However, in the event that something unexpected happens within the tenant, logs can be helpful for diagnosing the problem so it can be fixed. If a tenant admin cannot fix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

Roles

Dispatcher Stratus 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.

Roles within Dispatcher Stratus are critical to managing member access and permissions, ensuring the appropriate level of control and security while facilitating smooth operations within the organization.

During tenant **Onboarding**, roles are static. After configuration, you can create **custom roles** containing sets of permissions specific to your business needs. The Roles page appears in the following illustration:



Note: To access and edit this page, you must have the necessary **User permissions**.

The Roles page lists all the roles currently available in the tenant. For each role, the page lists any tenant member groups and/or tenant members assigned to the role. You create and maintain roles via the Roles page, and assign roles to members and members groups via the **User Management** page. You can assign a role to multiple members and/or member groups.

Roles consist of one or more permissions. Each permission provides access to, or grants editing capabilities for, a certain page or function on a page in the Dispatcher Stratus portal. For example, you can create a role with the following permissions:

- View access to the Devices page. View access does not include editing capabilities.
- Full access to the Users page. A partial list of the permissions includes:
    - View the Users page.
    - Invite new members to the tenant.
    - Create, edit, and delete member groups.

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.

Standard Roles

Dispatcher Stratus includes several standard roles, listed below, each tailored to specific user needs. The permissions in these roles cannot be modified:

- **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.

Standard 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 and can edit workflows if **Edit permissions** have been granted to them. However, users 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.

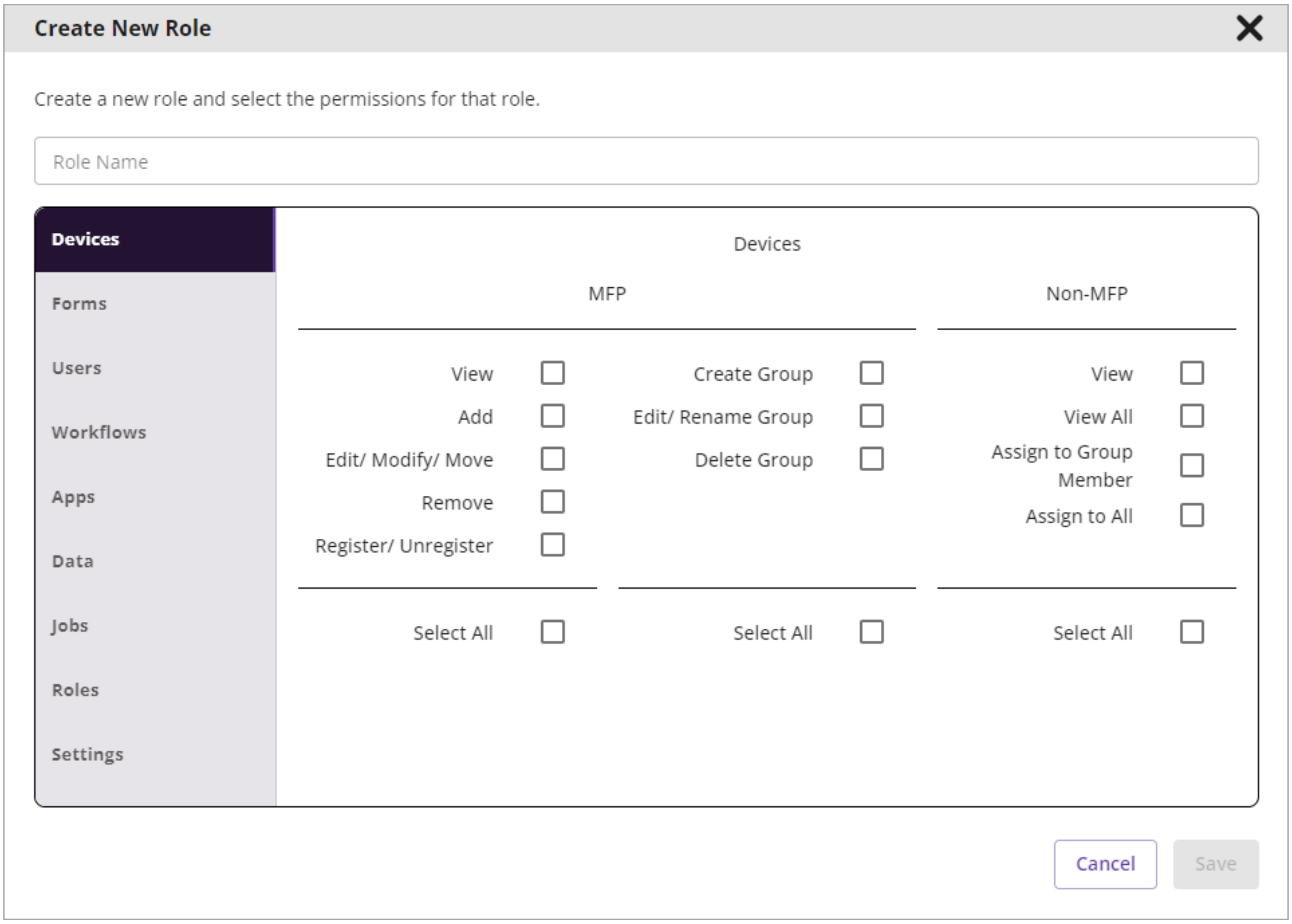
Roles Table

All roles appear in the Roles table, including the **Standard roles** as well as any **Custom roles** you have added to your tenant, along with the following information:

- **Role** - The name of the custom role.
- **Group Assignment** - A list of any **User Groups** that are configured with this role as the Default Role.
- **User Assignment** - A list of any users who have been granted this role.
- **Actions**
  - **View Role** - See the permissions associated with this role.
  - **Edit Role** - Edit the permissions associated with this role. Note that the Tenant Super Admin role cannot be edited.
  - **Delete Role** - Remove this role from the tenant. Note that a role cannot be deleted if it is assigned to a user who has no other assigned roles. Also, the three default roles (Tenant User, Tenant Admin, and Tenant Super Admin) cannot be deleted.

Custom Roles

To create a custom role, use the Create New Role button on the Roles page. Custom roles provide the flexibility you need to tailor permissions according to your organizational requirements. Privileged tenant members can craft roles that precisely match their operational needs, enhancing efficiency and security. The following illustration shows the Create New Role window:



To create a custom member role, do the following:

1. Select **Create New Role**. The Create New Role window appears.
2. Specify a name for the role.
3. In the Pages panel, select a page such as “Devices”. The Permissions panel displays the permissions associated with the page.
4. Select one or more permissions to include in the role.
5. Repeat steps 3 and 4 to include other permissions in the role.
6. When done, select **Save**. You return to the Roles page, where the new role now appears in the Roles column.

Assigning Roles

To assign roles to member groups or members, access the **User Management** page. You can assign a role to a **user** or associate it with a **user group**.

Editing Roles

To edit a custom role, do the following:

1. Select the role you would like to update.
2. Click the **Edit** button.
3. Select and/or deselect the options until the role has the permissions you want.
4. Select **Save**.

List of Permissions

You assign permissions via the Create New Role window. The following sections list the permissions available for assignment to custom roles, organized by type. The following types are available:

- **Devices**
- **Forms**
- **Users**
- **Apps**
- **Workflows**
- **Data**
- **Jobs**
- **Settings**

Devices Permissions

These permissions control access to devices such as MFPs and more. Role permissions include:

MFP

- View - See a read-only list of devices.
- Add - Import new devices.
- Edit/Modify/Move - Update existing devices.
- Remove - Delete existing devices.
- Register/Unregister - Assign or unassign a license to a device.
- Create Group - Create a new device group.
- Edit/Rename Group - Modify an existing device group.

- Delete Group - Remove an existing device group.

Non-MFP

- View - See a read-only list of non-MFP devices.
- View All - See all users with assigned licenses.
- Assign to Group Member - Assign licenses to a single member of a User Group.
- Assign to All - Assign licenses to any tenant user with non-MFP device permissions.

Forms Permissions

These permissions control access to forms, which allow for user interaction with workflows. Role permissions include:

- View - See a read-only list of forms.
- Add - Create new forms.
- Edit/Modify/Move - Update existing forms.
- Remove - Delete existing forms.
- Import/Export - Import forms created in another tenant into the current tenant, and export forms to a file that can be imported into another tenant.
- Activate - Make a form accessible to workflows/nodes.
- Deactivate/Unpublish - Make a form inaccessible to workflows/nodes.
- Create Group - Create a new form group.
- Edit/Rename Group - Modify an existing form group.
- Delete Group - Remove an existing form group.
- Clone - Create an exact duplicate of an existing form group.

Users Permissions

These permissions control access to users, including user groups and more. Role permissions include:

- View - See a read-only list of users.
- Invite - Send invitation emails to new users.
- Edit/Modify/Move - Update existing users.
- Remove - Delete existing users.
- Block - Prevent existing users from accessing the tenant without removing the users' data.

- Assign User Role - Assign member roles to tenant members.
- Transfer Ownership - transfer a tenant member's **ownerships** to another tenant member.
- Create Group - Create a new user group.
- Edit/Rename Group - Modify an existing user group.
- Delete Group - Remove an existing user group.
- Assign Group Role - Assign member roles to tenant member groups.

Note: The permissions to invite users or edit users' permissions prevent the assignee from inviting or editing users whose level of permissions exceed theirs. For example, a Tenant Admin cannot invite a Tenant Super Admin because the Tenant Super Admin role has more permissions than the Tenant Admin.

Apps Permissions

These permissions control access to the **Apps page** and its functions. Permissions are definable by app type (Internal, External, or Generic URL). For each app type, the following permissions enable a user to:

- Create - Access the Create New App window via the Create New App button on the Apps page.
- Use - View, run, and copy the link for apps that have been shared with them.
- Delete - Delete apps they created.
- Share - Share apps they created.

Workflows Permissions

These permissions control access to workflows, including scheduling, sharing, workflow groups, and more. Role permissions include:

- View - See a read-only list of workflows.
- Create - Create new workflows.
- Edit/Modify/Move - Update existing workflows.
- Delete - Delete existing workflows.
- Share - Provide access to existing workflows to other users.
- Run/Stop/Pause - Update the status of workflows.
- Change Owner - Update the owner of workflows.
- Import/Export - Save a workflow outside of the tenant and upload a saved workflow to a tenant.
- Sample Workflows - View and access the Sample Workflows table, and

- Create Group - Create a new user group.
- Share Group - Provide access to a workflow group to another user.
- Edit/Rename Group - Modify an existing user group.
- Delete Group - Remove an existing user group.
- Clone - Create an exact duplicate of an existing workflow group.

Data Permissions

These permissions control access to the data generated by the tenant, including analytics. Role permissions include:

Dashboard

- View - See analytics data about tenant usage.

Logs

- View - See the log records for users, workflows, etc.

Jobs Permissions

These permissions control access to jobs. Role permissions include:

Job Queue

- View - See one or more job queues.
- Create - Create new job queues.
- Edit/Modify - Update existing queues.
- Delete - Delete a job queue.
- Activate/Deactivate - Activate or deactivate a job queue.

Tracker

- View - See and interact with jobs in your job tracker.
- Track Jobs - Add jobs to your tracker.

Jobs

- View - See and interact with jobs.

Job Naming

- View/Modify - See and edit job naming conventions that can be applied to jobs.

Roles

These permissions control access to user roles and the permissions they contain. Permissions include:

- View - See current roles.
- Create - Create new roles.
- Edit/Modify/Move - Updating existing roles.
- Remove - Delete existing roles.

Note: The permissions to create or edit roles prevent the assignee from creating or editing roles whose level of permissions exceed theirs. For example, a Tenant Admin cannot create a role with Tenant Super Admin permissions because the Tenant Super Admin role has more permissions than the Tenant Admin.

Settings Permissions

These permissions control access to the Settings and Profile pages and other system-wide settings. Permissions include:

Settings

- View - See tenant settings.
- Edit/Modify/Move - Update existing tenant settings.

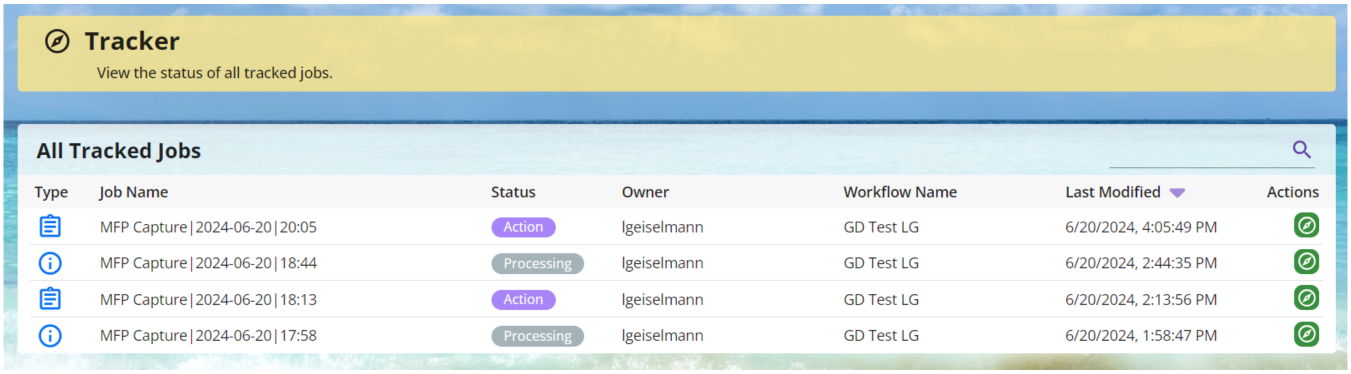
Profile

- Out of Office - Access the **Out of Office** area of the Profile page, where users can set their status as “out of office”.

System

- Manage Notifications - Create, see, and edit system notifications.

Tracker



The Tracker area displays information about the jobs you have selected to continue watching after you are no longer the owner. This allows you to follow the progress of jobs and documents through a workflow to continue to interact with the job via **Notes**, modify **Forms**, ensure timely completion of jobs, and more. Typical uses of the Tracker include:

- Job Management - A manager can add a job to their Tracker before delegating the job to another employee. The manager can then monitor the job's progress through the workflow.
- Additional input - An employee can add a job to their Tracker to access it later and join the Notes conversation surrounding the job.

Note: If a job remains in the system for 365 days, it ceases to be viable and can no longer progress through Dispatcher Stratus.

The following information is provided:

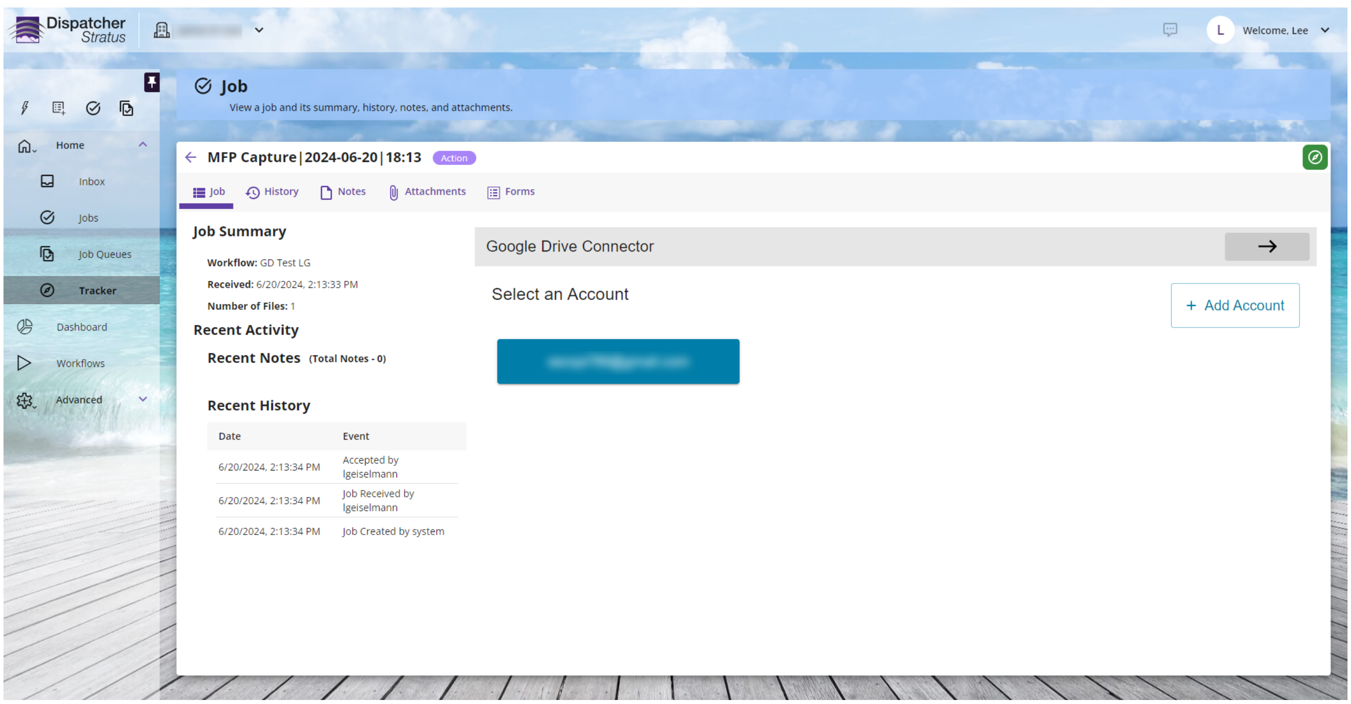
- Type - This column describes what kind of item it is.
  - Document - Related to workflows and usually includes an action that needs to be taken.
  - Information - Workflow updates and additional facts, such as "Job Created", "Attention", etc.
  - Error - Problems, usually with workflows, that should be reviewed.
- Job Name - A short description of the item. Job names contain the following elements: Input Node Name | Date Received | Time Received, based on your selected time zone (See **Settings**). If a workflow diverges or splits, the "Input Node Name" portion of the Job Name will update to the name of the node where the split happened.
- Info - The current state of the job.
  - Action - You need to take some action to move the job to the next step in the workflow. Clicking on a job with the Action tag will open the job on the **Jobs** page. Depending on the owner of the job, you may have full access or read-only access.

- Approval - You need to approve the job and send it to the next step in the workflow or deny it.
- Complete - The job has reached the last node in the workflow and cannot be modified. The job may still be accessible via the Tracker in a read-only capacity.

- Owner - The person or node that needs to take the next action in the workflow.
- Workflow Name - The name of the workflow that generated the tracked item.
- Last Modified - The date and time of the last update to the job, based on your selected time zone (See **Settings**).
- Actions - The actions available to you.
  - Untrack - Remove this job item to your Tracker.

You can search through the available jobs using the Search field in the upper-right corner. The Search function includes every column provided when searching.

Clicking on one of your tracked jobs opens the **Job**.

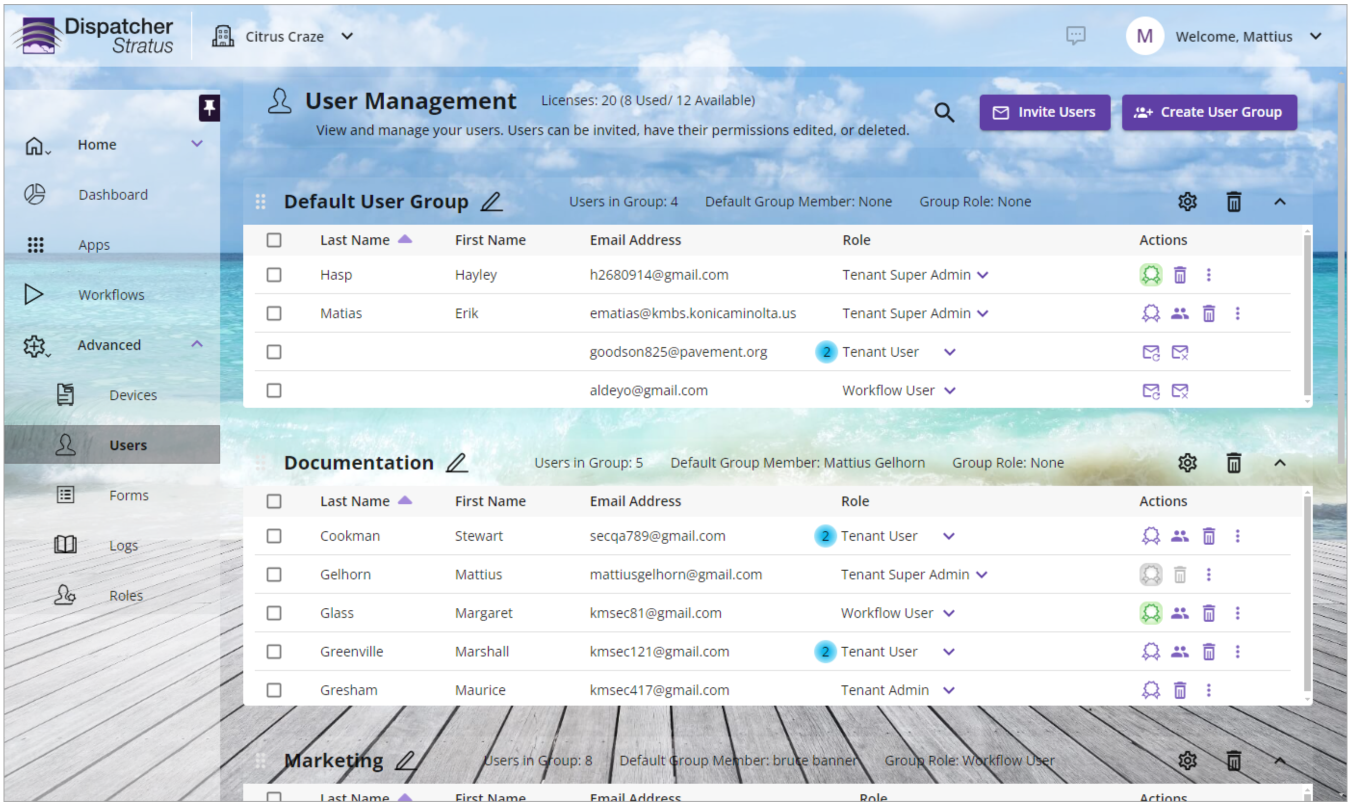


Note: You may only add notes, add attachments, or approve/reject jobs that are assigned to you. Tracked jobs that are assigned to another user are visible but not editable.

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 Citrus Craze 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 and other privileged users . Thus, tenant members cannot modify roles and permissions, including their own, without proper access.

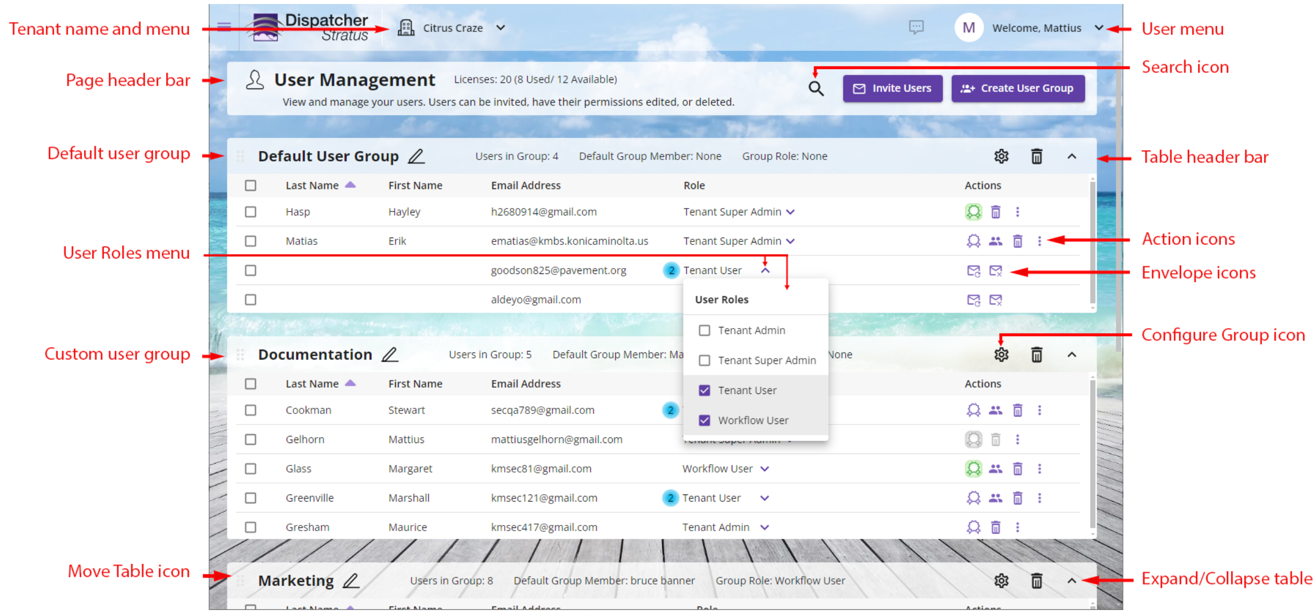
Managing Tenant Members

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.

The following illustration identifies many of the elements on this 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 Stratus 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.

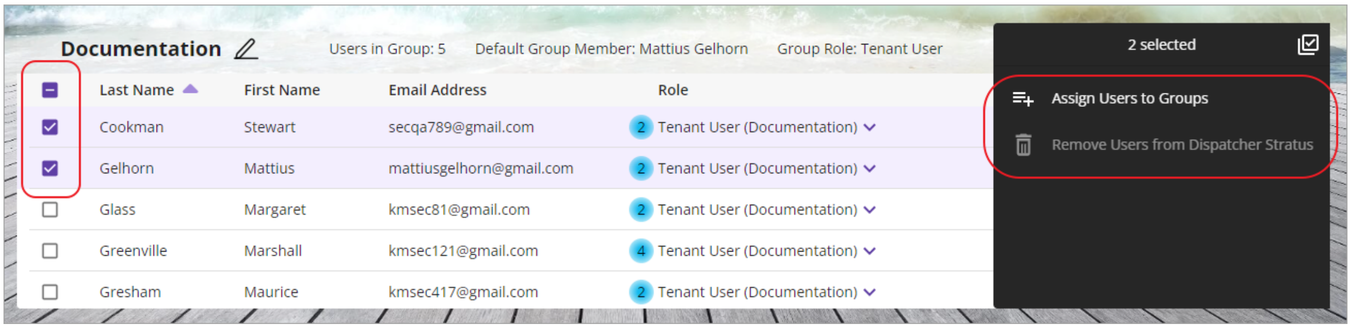
Each member group table contains the following columns of information:

- 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:

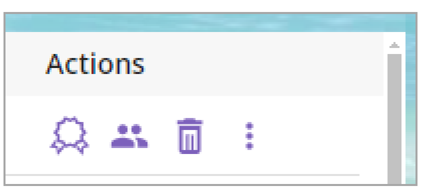


- Assign Users to Groups - Accesses the **Assign Users to Groups** window, where you can select the groups you want to assign to the selected users.
- Remove Users from Dispatcher Stratus - Accesses the **Remove User** window, where you can remove the selected users from the tenant.

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:



- Medal - Register/unregister a license from this user.

- 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. A Clock icon appearing instead of the Trash icon indicates the user has been **scheduled for removal**.
- Ellipsis - Displays a menu with the following additional actions:
  - **Transfer Ownership** - Accesses the Transfer Ownership window.
  - **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

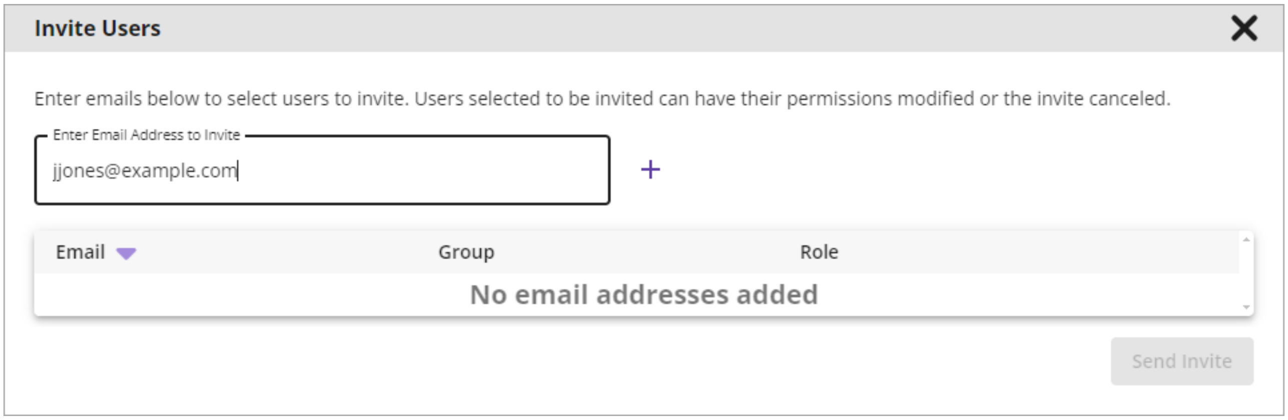
Privileged users can send an email invitation to any valid email address. The email contains a link to Dispatcher Stratus , where the invitee can accept or reject the invitation.

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).

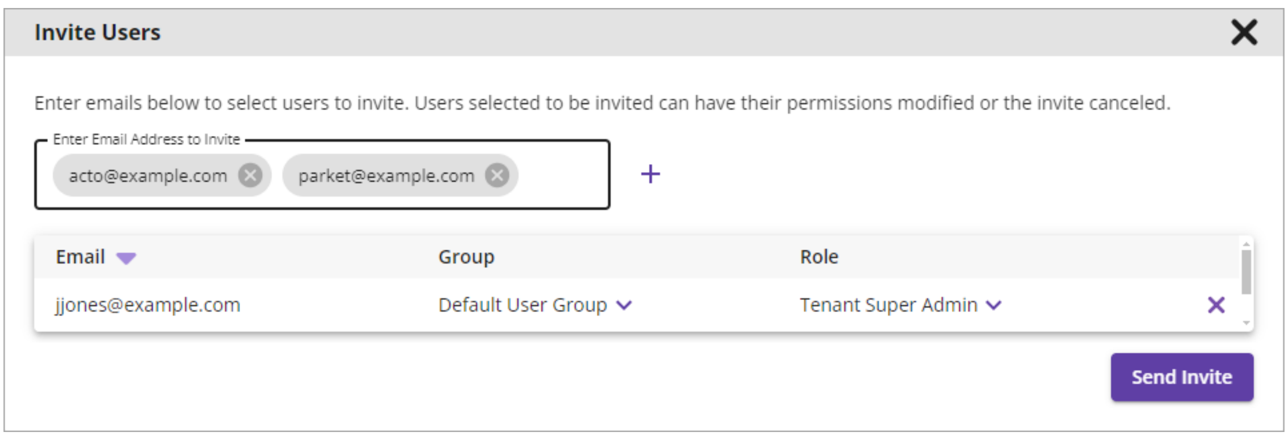
To invite a new member, do the following:

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

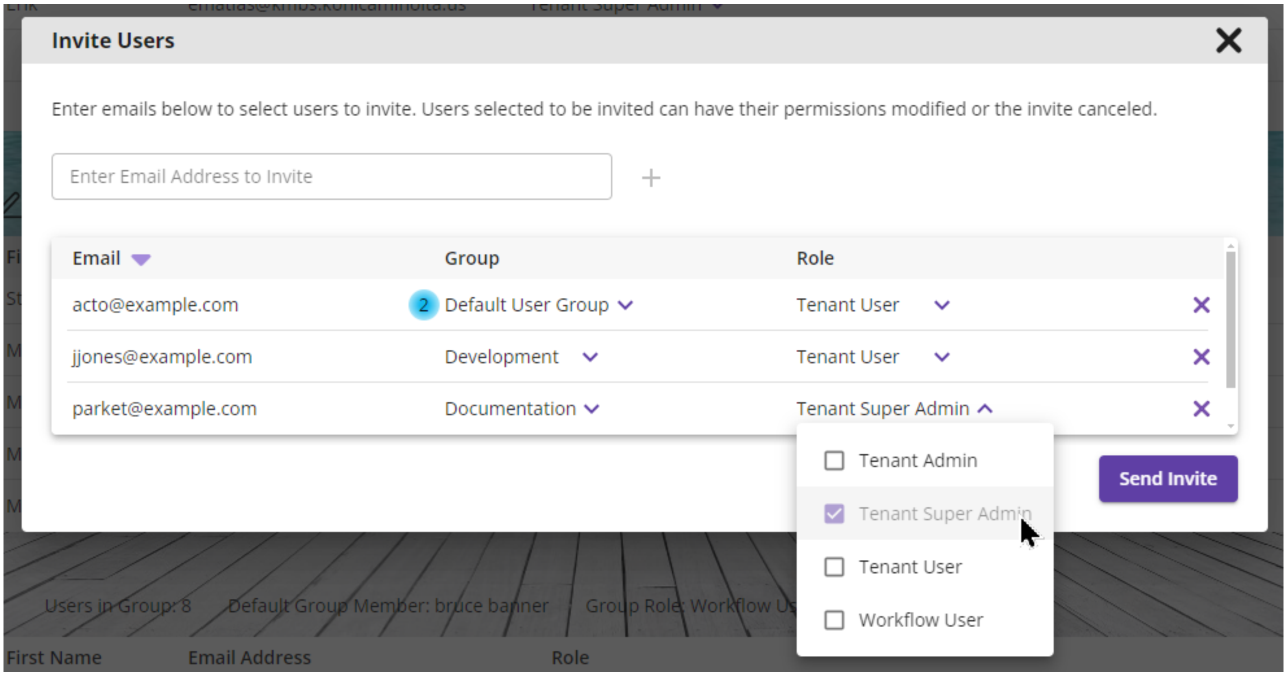


2. Enter a valid email address, then select **+**. The address appears in the Recipient table below, and the **Send Invite** button activates.

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.

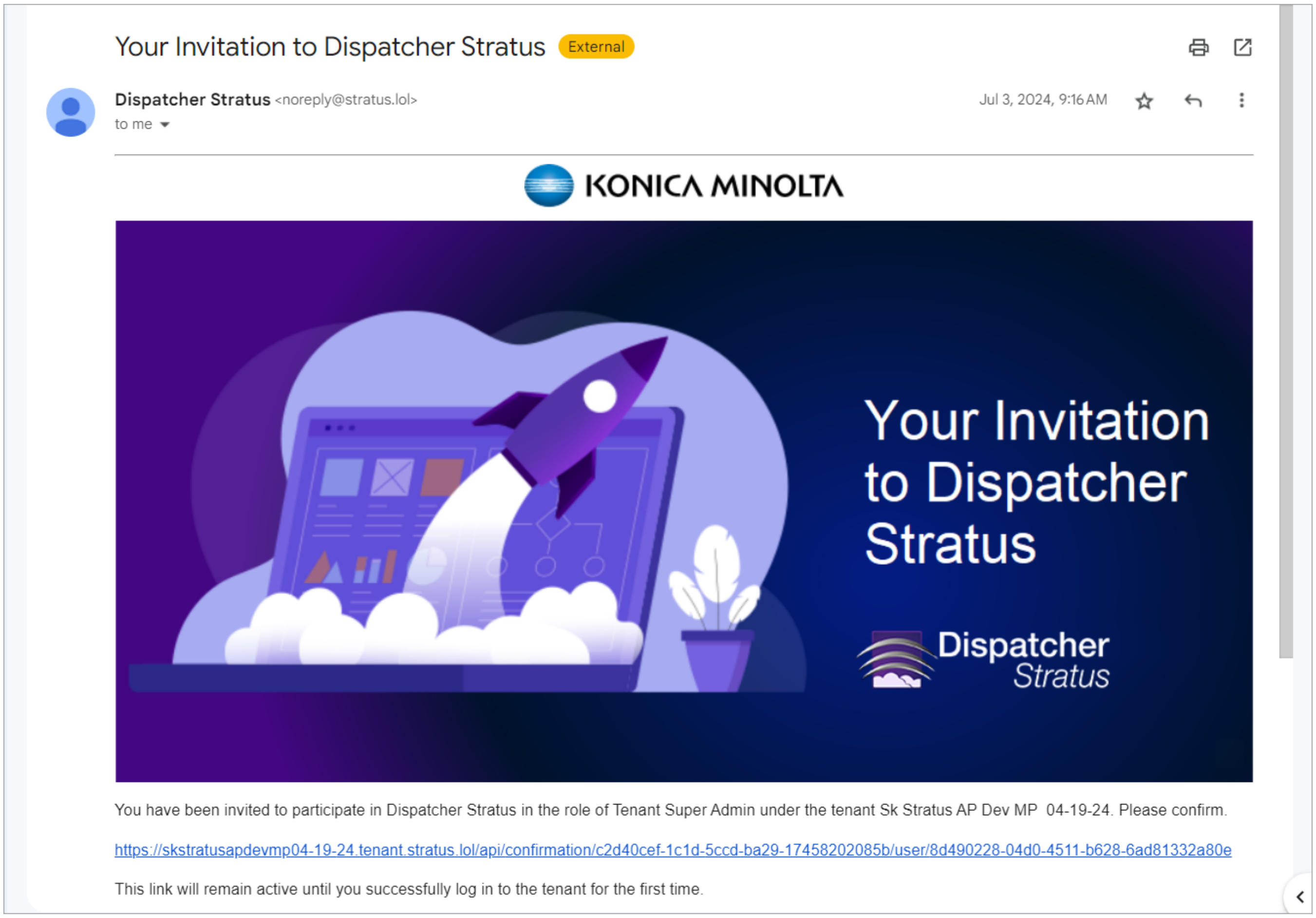


Note: Tenant invitations can only grant permissions at the same level or lower than the permissions held by the user sending the invite. For example, a tenant admin cannot invite a super admin; only a super admin can invite another super admin.

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:

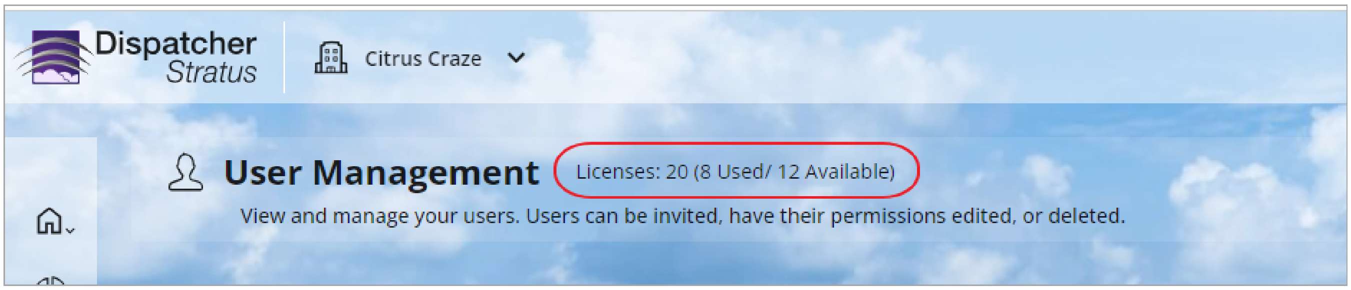
1. In the Actions column, select the **Cancel Invite** icon associated with the pending member. The Cancel Invite window appears.

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.

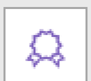
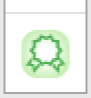
Licensing Users

Tenant members must be licensed within the tenant to perform certain Dispatcher Stratus functions. Privileged users can access the User Management page to view the number of licenses available in a tenant and assign/unassign licenses for members in the tenant. Assigning a license reduces the quantity available, while unassigning a license increases the quantity available.

The Page header bar lists the licensing count in the tenant:

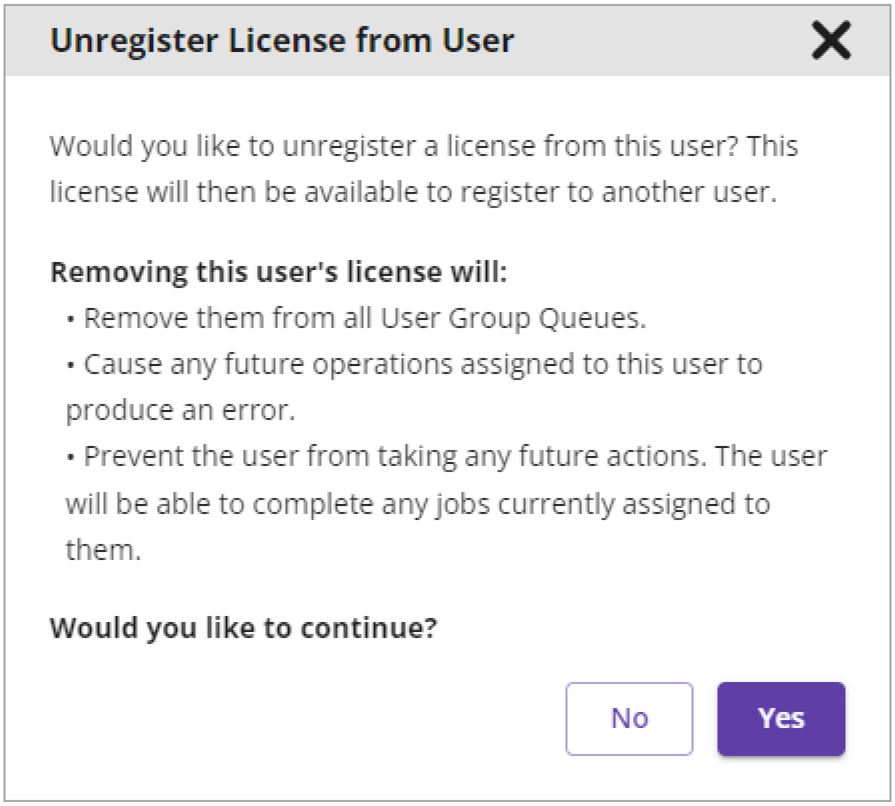


For tenant members, the Medal icon in the Actions column indicates the user's current licensing status:

Icon	Status
	User unlicensed
	User licensed, and is the default member of one or more user groups
	User licensed

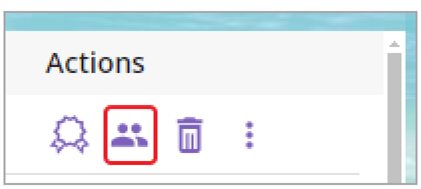
To change a user's licensing status in the tenant, do the following:

1. Select the Medal icon in the Actions column for the user you want to modify:
   - For unlicensed users, the Register License to User window appears. If a license is available in the tenant, you can assign it to the user.
   - For licensed users, the Unregister License from User window appears, providing details on the effects of removing a license from a user:

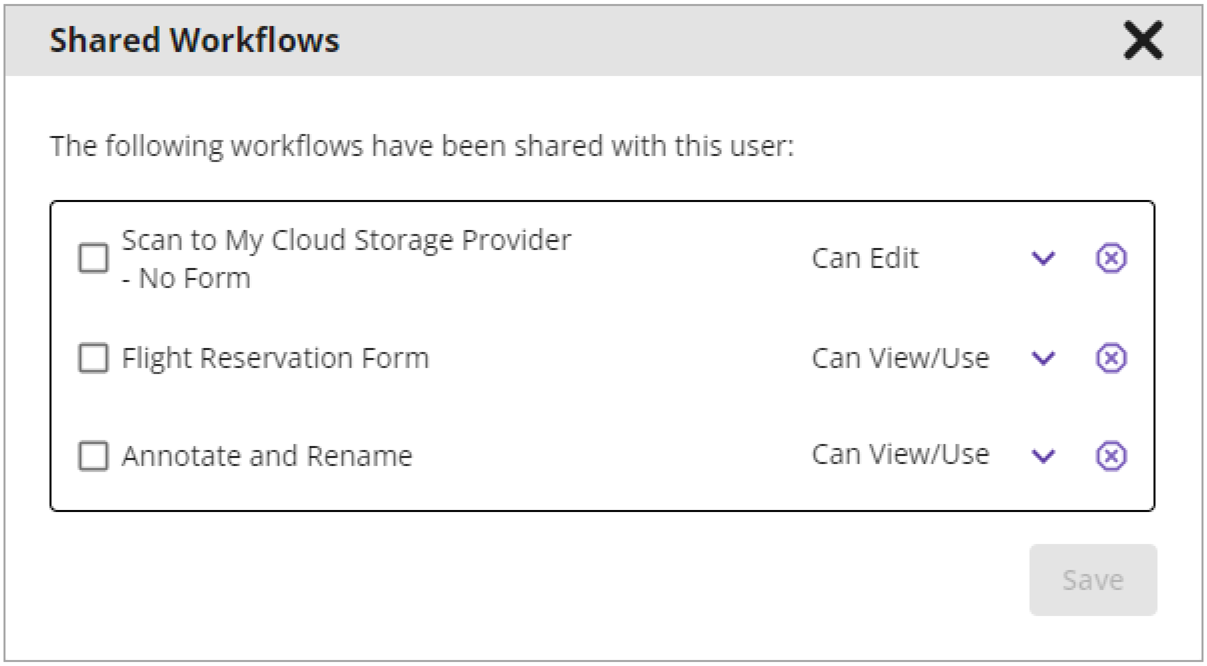


Shared Workflows

The Actions column displays the Shared icon for any users to which one or more workflows have been shared:



If you select this icon for a user, the Shared Workflows window appears, listing the workflows currently shared with the user, and the user’s edit capabilities for each:



You have the following options:

- To unshare a workflow shared to the user, select the associated **X** button.
- To unshare multiple workflows shared to the user, select the associated boxes and select **Stop Sharing** from the panel that appears. To cancel the operation, de-select the boxes or select **Clear All** from the panel.
- To change the user’s edit access to a workflow, select the associated dropdown in the column to the right and select a permission from the list that appears. Note that this permission can also be modified via the Workflow Sharing window, accessed via the Workflow Management page.
- Once you modify any of the current settings, the **Save** button activates. To preserve your changes, select **Save**. Otherwise, select **X**.

Removing Users

Privileged tenant members can remove any member from the tenant except the following:

- The last super admin in the tenant. All tenants must have at least one super admin.
- The logged in user, who can only be removed by another logged in user.

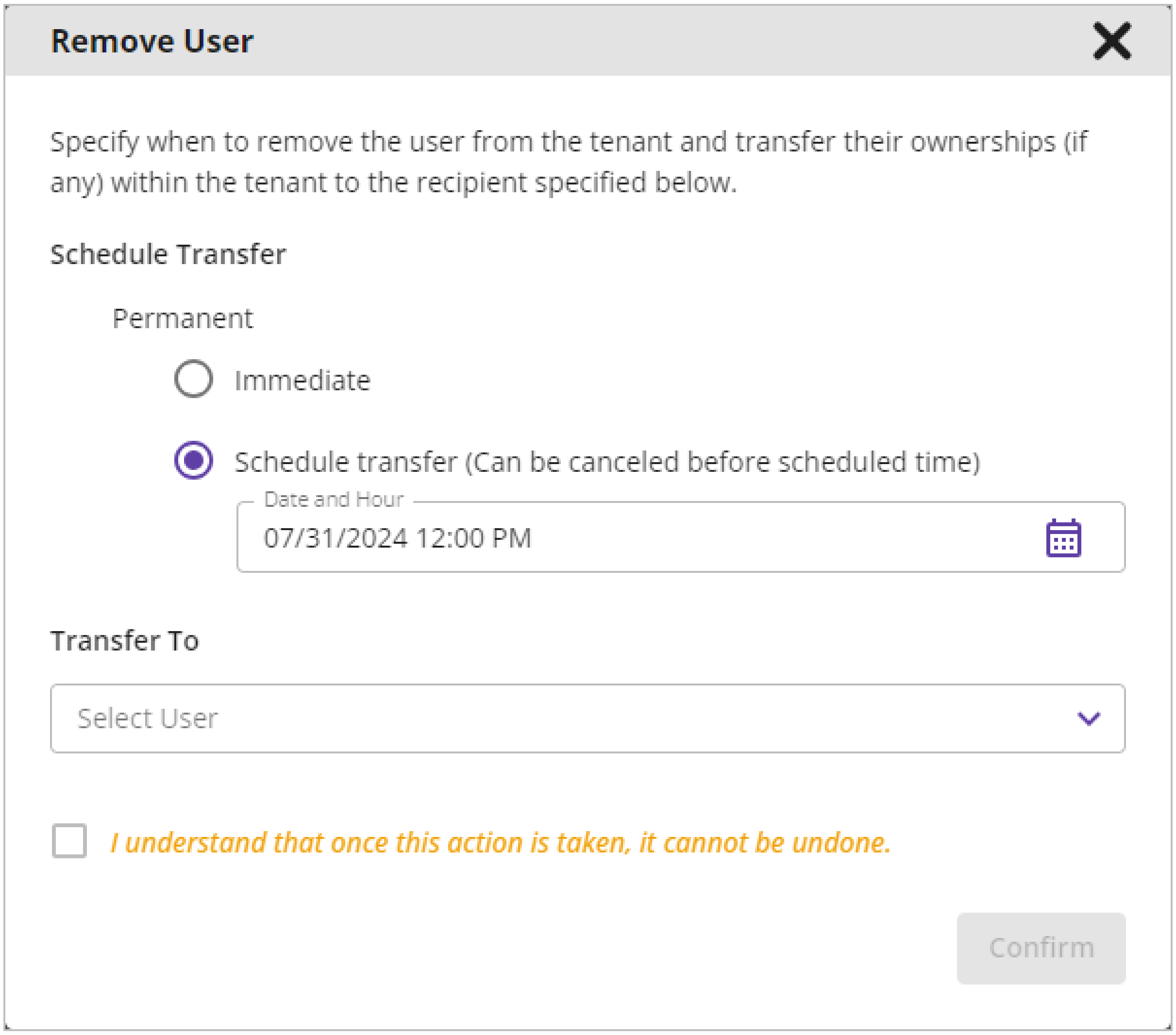
Notes:

- If you remove a tenant member who has **ownerships** within the tenant, this process will require you to specify a tenant member to **transfer** the ownerships to.
- 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 appears in the Remove User

window indicating that workflows will no longer have an owner and thus be inaccessible.

To remove a user 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. Specify when to execute the removal. You have the following options:
   - Immediate - Transfer the user’s ownerships and remove the user from the tenant immediately. This action cannot be canceled or undone.
   - Schedule - Schedule the date and hour at which to transfer the user’s ownerships and remove the user from the tenant. You can cancel this action at any time prior to the scheduled date.

3. Select a tenant member to assume the user’s ownerships (if any) within the tenant. At the time of removal, all future activity associated with those ownerships will be redirected to the recipient you select at the **Transfer To** field.

Notes:

- Once a removal executes, it cannot be canceled or undone.
- For users scheduled for removal, a Clock icon appears for the user in the Actions column on the Users page.

Canceling a Scheduled Removal

You can cancel a scheduled removal at any time prior to the scheduled start date and hour. Do the following:

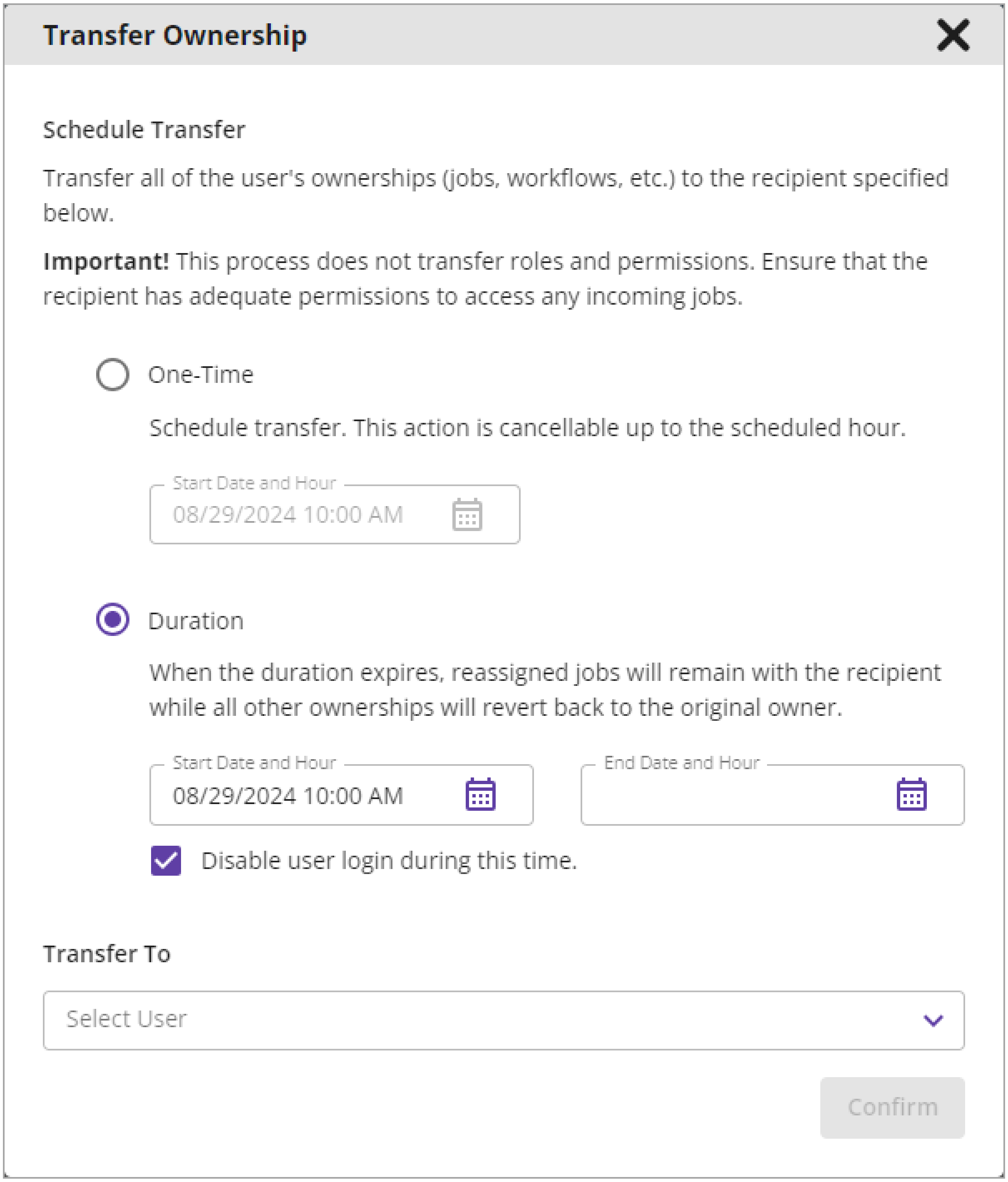
- On the Users page, select the Clock icon associated with the user. The Remove User window appears.
- Select **Cancel Transfer**. The transfer is canceled, and the Clock icon is removed from the Users page.

Transferring Ownerships

Privileged users can transfer a tenant member’s ownerships within the tenant to another tenant member, for example, if the member is leaving the tenant or taking a leave of absence from your organization. This process transfers all of the member’s ownerships, and all of their items within their ownerships.

To transfer a member’s ownership, do the following:

1. On the Users page, select the Transfer Ownership icon ( ) associated with the member whose ownerships you want to transfer. The Transfer Ownership window appears:



2. Select the type of transfer. You have the following options:

    - One-Time - Transfer the user’s ownerships at a specified date and hour. In addition to the ownerships, all future activity associated with those ownerships will be redirected to the recipient you select at the Transfer To field.
    - Duration - Transfer the user’s ownerships and, for the specified duration, redirect all activity associated with those ownerships to the recipient you select at the Transfer To field.

Important! - When the duration ends, all ownerships except jobs revert back to the original owner. Transferred jobs remain with the recipient of the transfer.

- Disable user login during this time - To prevent the user from logging in to the tenant during this period, select this option.

3. Select a tenant member to receive the transferred ownerships. If the recipient does not belong to all of the user’s groups, a message appears stating that the recipient will be added to all of the user’s group, ensuring that the recipient will be able to assign jobs to those groups.

About Transferring Ownerships

- Transferring ownerships affects many elements of Dispatcher Stratus such that frequent reassignments can disrupt the continuity of tasks. We recommend you use this feature with care.
- Once a one-time transfer executes, it cannot be canceled or undone. To regain ownership, a tenant member must assign it back to the user.
- For a pending (scheduled) transfer of ownerships, a Clock icon appears for the user in the Actions column on the Users page.
- Roles do not transfer as part of this process. If a transfer recipient does not have access to an ownership, they must be granted access to it.

Canceling a Scheduled Transfer

You can cancel a scheduled transfer:

- One-Time transfer - Cancel any time prior to the scheduled start date and hour.
- Duration transfer - Cancel any time prior to the scheduled end date and hour.

To cancel a scheduled transfer, do the following:

- On the Users page, select the Clock icon associated with the user. The Transfer Ownership window appears.
- Select **Cancel Transfer**. The transfer is canceled, and the Clock icon is removed from the Users page.

Tenant Ownerships

Many user-defined elements in Dispatcher Stratus tenants require a member to be designated as the owner. The system usually assigns initial ownership to the creator of the element. Privileged users can then reassign the ownership to another tenant member. Types of ownerships within a tenant include the following:

- Jobs
- Workflows

- Forms
- User groups
- Default group memberships
- Non-MFP Device licenses - Any transferred non-MFP device licenses will be added to the recipient’s current license count.
- People licenses - If a transfer recipient is already licensed, the People license will be released for use by another tenant member.
- Device licenses
- Node config

Note: The Transfer Ownership process transfers all of a tenant member’s ownerships to another tenant member. Ownerships can also be transferred individually. For example, privileged users can use the Change Owner option on the Workflow Management page to change a workflow’s owner.

Transferred Items

During a transfer of ownership, the following items are transferred:

- User group assignments
- Workflow access
- Jobs
- Job queue assignment (one-time transfers only)
- Workflow ownership (one-time transfers only)
- Default user group assignment (one-time transfers only)
- Assigned user in People Node config (one-time transfers only)
- People licenses (one-time transfers only)
- Non-MFP device licenses (one-time transfers only)

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:

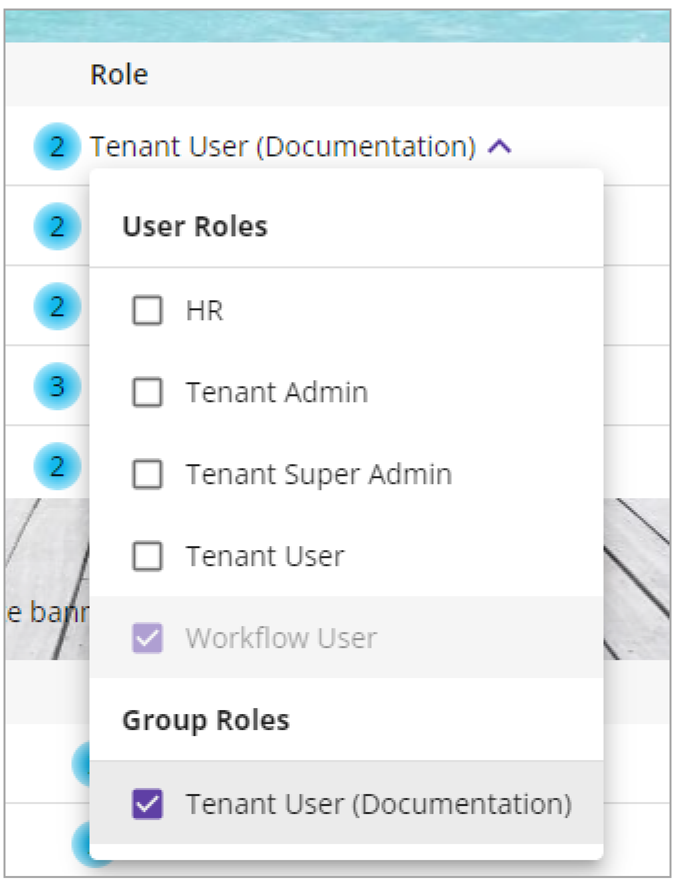
1. In the Actions column, select the **Block User** icon associated with the tenant member. The Block User window appears.
2. To block the user, select **Yes**. The Block User icon turns orange, indicating the member is blocked from the tenant.

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**. They can also be assigned one or more **group roles**. 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, as well as the group roles (if any) currently assigned to the user. A checkmark indicates a role assigned to the user.

In the above illustration, note the following:

- “HR” is a custom role. The others are predefined roles.
- The only user selected role, “Workflow User” is not selectable because deselecting this role would remove the user’s only user role, and users must always be assigned to at least one user role.
- The Group Roles area displays the group roles to which the user is assigned. The group name appears in parentheses next to the role.

Managing User Groups

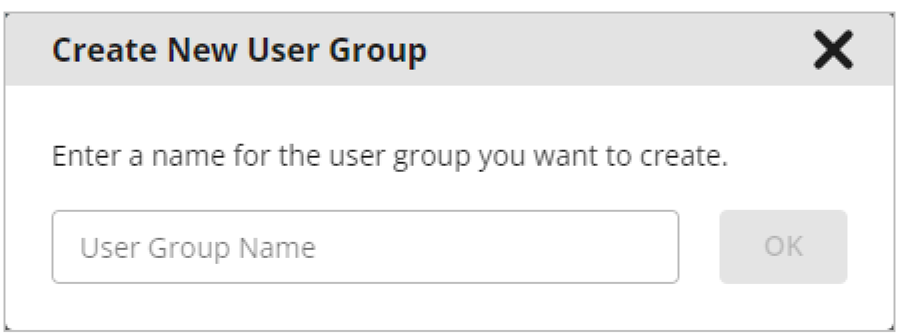
In addition to the Default User Group provided provided by Dispatcher Stratus, you can create custom member groups, helping you organize your tenant members and bulk-assign roles. For example, you can create a **user group** for members who access the same workflows. User groups can contain any number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

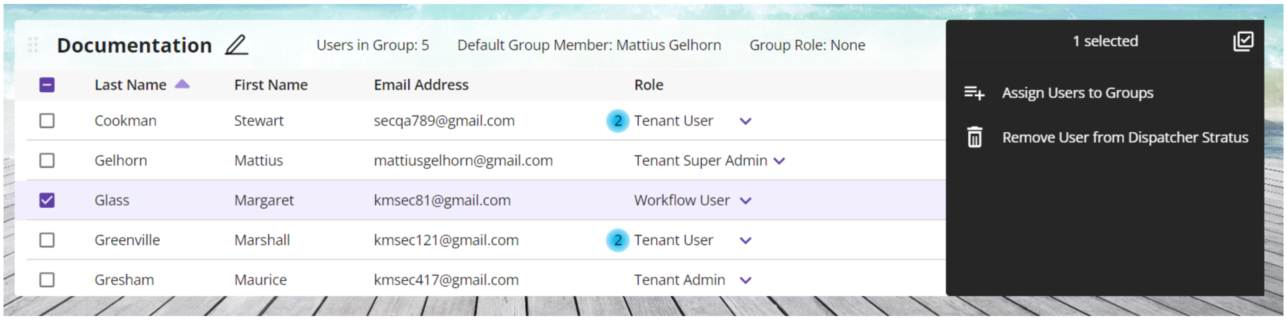
Configuring a User Group

The following sections describe your configuration options for user groups.

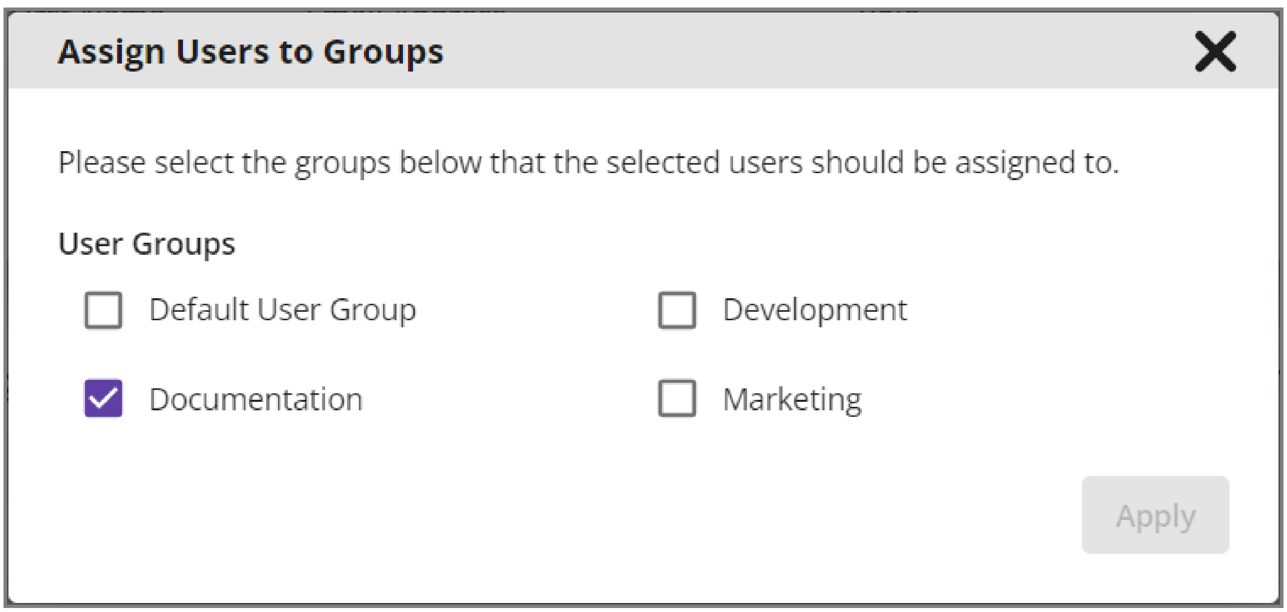
Assigning Users to a User Group

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**.

Default Group Member

Privileged users can assign a “default group member” to a user group. The default group member (if any) displays on the table’s header bar, and is used by the following **People nodes**:

- **People Group** - All incoming jobs to the group are assigned to the default group member’s Jobs page.
- **People Queue**. Before you can configure any **Job Queues**, you must first configure a group with a default member.

To specify a default group member, select the **Gear** icon on the header bar of the user group you want to modify. The **Group Configuration Window** appears.

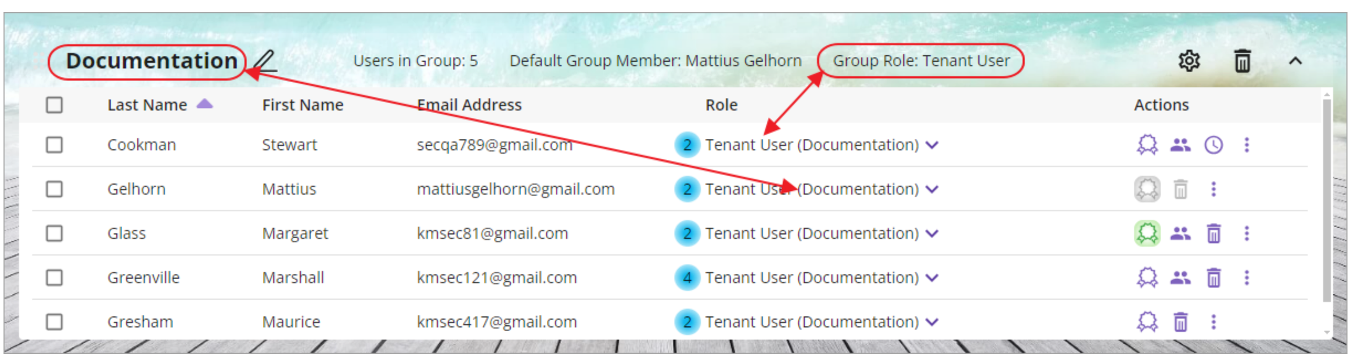
Group Roles

In addition to **user roles**, tenant members can be assigned group roles. Group roles have the same functionality as user roles, and are constructed from the same list of permissions. However, group roles differ from user roles in the following ways:

- Group roles are assigned to a user group, and then automatically applied to all users in the group. User roles are assigned to individual users manually, via the User Roles menu.
- Unnassigning a group role from a user can affect the other members of the group.
- Group roles are indicated by the group name in parentheses next to the role name.

Assigning a Group Role

Privileged users can assign a group role to a user group, so that all members of that group are automatically assigned that role, in addition to any other roles they have been assigned. The group role (if any) displays on the table’s header bar. The following illustration shows the “Documentation” user group, to which the role “Tenant User” has been specified as the group role:

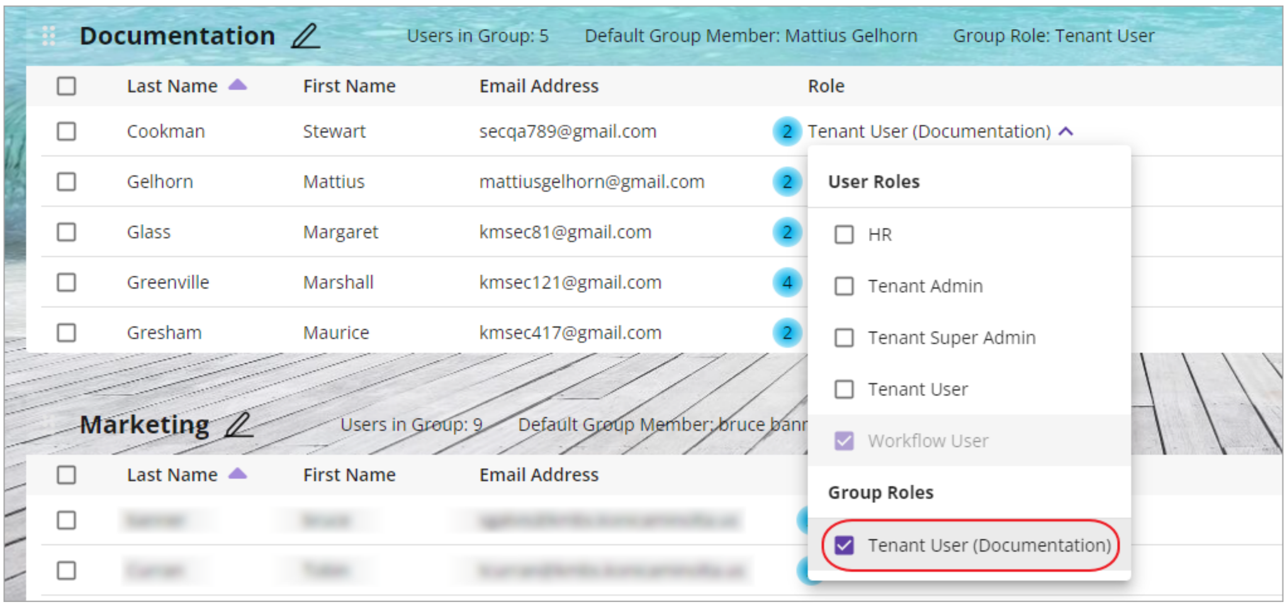


To specify a group role, select the **Gear** icon on the header bar of the user group you want to modify. The **Group Configuration Window** appears.

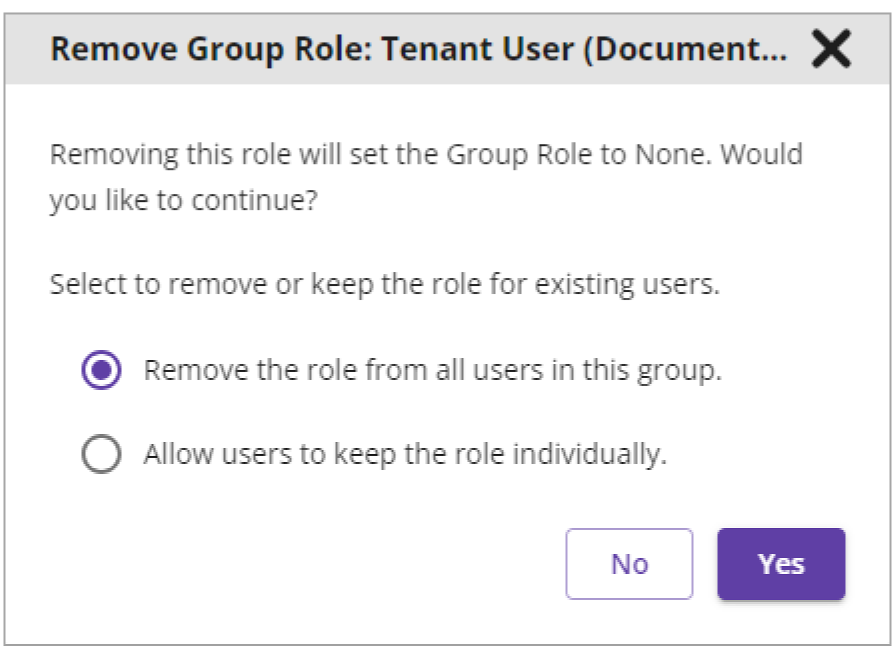
Unassigning a Group Role

If you attempt to unassign a group role from a user group, the group role will change to “None”, but you must specify whether to unassign the role from all members of the group, or from the selected user only. Do the following:

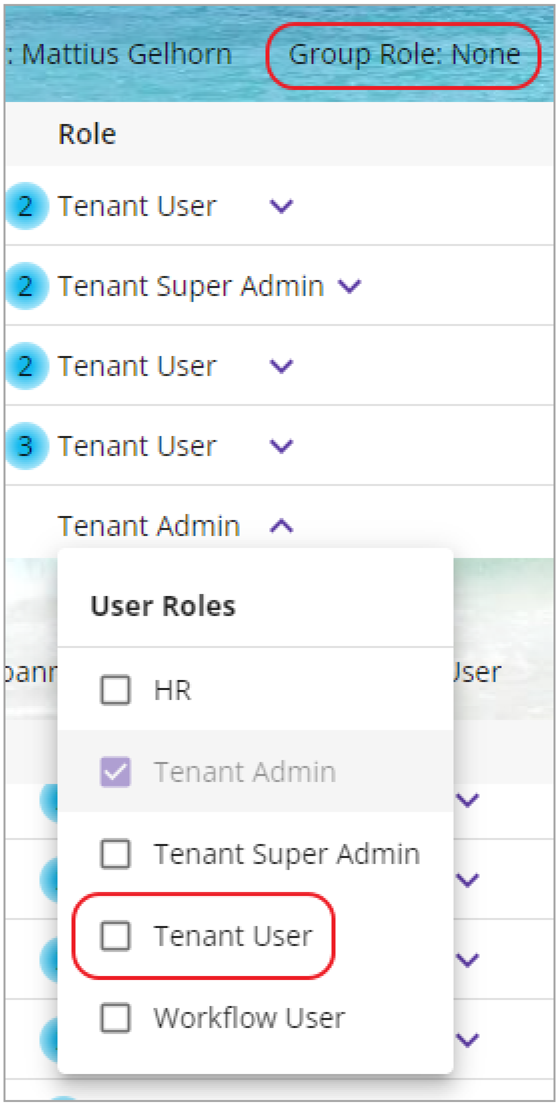
1. Locate the user group containing the user (users can belong to multiple user groups).
2. In the user group’s table, select the Role dropdown associated with the user. The User Roles menu displays:



3. In the Group Roles section, select the role you want to unassign. The Remove Group Role window appears, displaying the following options:



- Remove the role from all users in this group - The role disappears from the Group Roles section, and is de-selected in the User Roles section for all group members.
- Allow users to keep the role individually - The role disappears from the Group Roles section, but remains selected in the User Roles section for all group members except the selected user. The following illustration shows the result for the selected user:

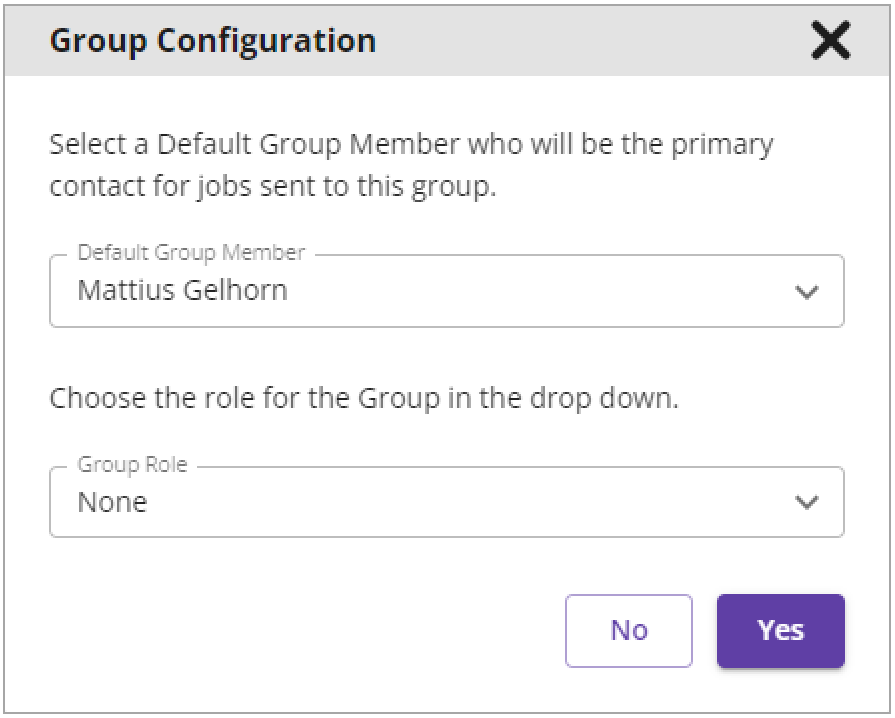


4. To confirm your configuration, select **Yes**. Otherwise, select **No**.

Group Configuration Window

Use this window to specify a **default group member** and/or a **group role** for a selected user group. Do the following:

1. Select the **Gear**  on the header bar of the user group you want to modify. The Group Configuration window appears:



2. In the Default Group Member field, select the drop-down and choose a group role from the list that appears. You can also select “None”.

3. In the Group Role field, select the drop-down and choose a group role from the list that appears. You can also select “None”.

4. Once you change the existing settings, the **No** and **Yes** buttons activate. To abandon your changes, select **No**. To preserve your changes, select **Yes**.

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

Interacting with Workflows

Workflows that use **People Nodes** allow for human interaction with documents and jobs within the workflow. Interactions with the workflow occur within the Dispatcher Stratus tenant website. Common examples of these interactions include:

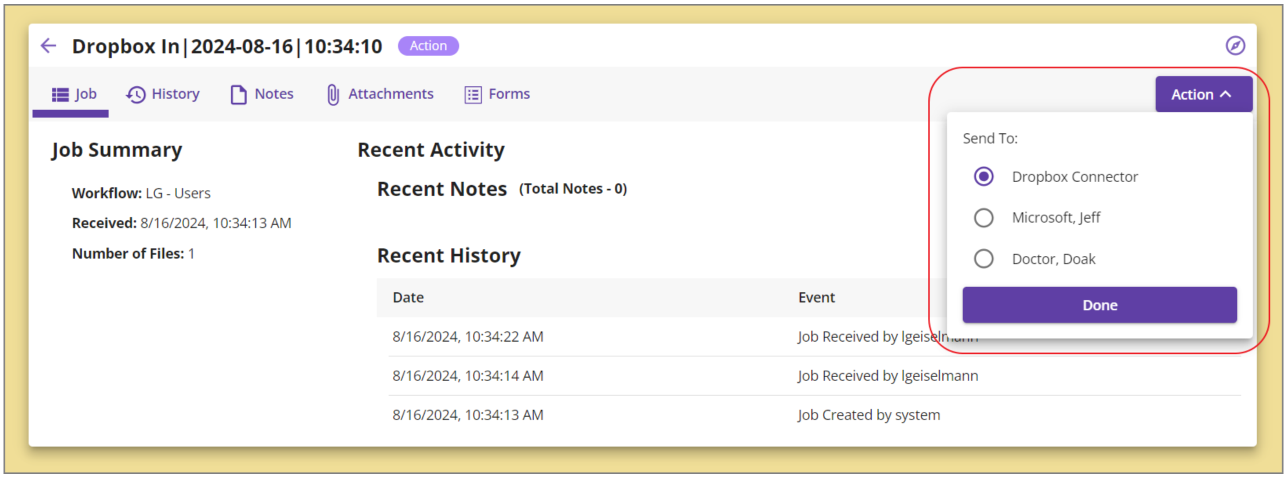
- Document approvals.
- Performing a necessary action outside the scope of the Dispatcher Stratus tenant, such as making a phone call or fixing a microwave.
- Reassigning the job to another employee.
- Etc.

Completing a Job

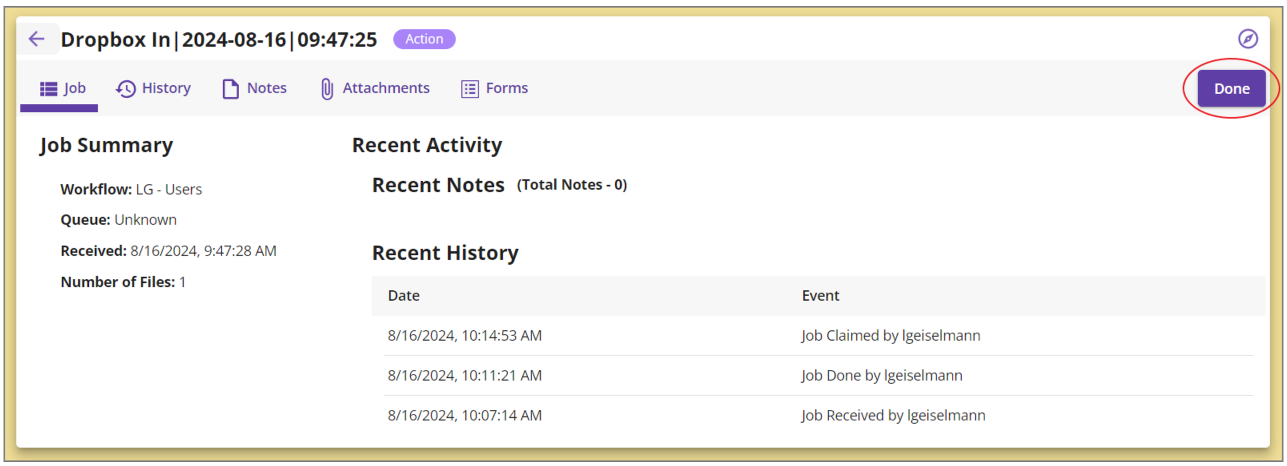
After a job has been assigned to you, you can access it, view any of the listed information, and take any necessary actions, such as approving the job. For more information about job assignments, see the **People Nodes** page. To complete a job, do the following:

1. Navigate to the Jobs page.
2. Select the job you would like to complete. This will take you to a page with detailed information about that job (described **above**).
3. Complete the task associated with the job.
4. Select the appropriate button in the upper-right hand corner.

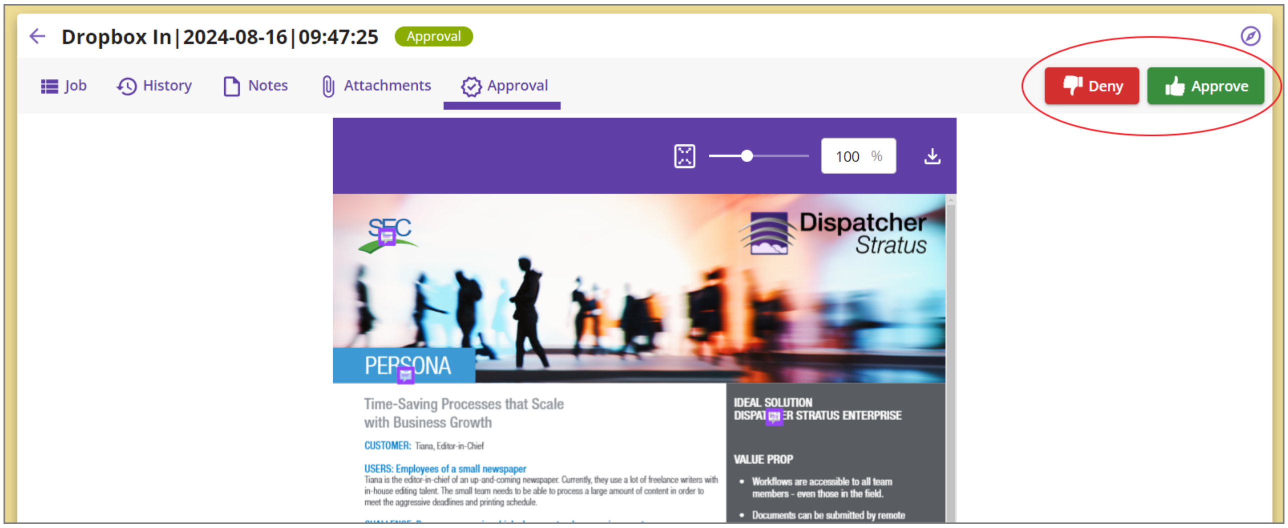
- For jobs from the **People User** node, created by the **People Queue** and already claimed, and created by the **User Group** where the workflow is configured with a **user-selectable connector** connecting to the next node, this button is labeled **Action**. Select the next destination for the job. Then, select the **Done** button to complete the job.



- For jobs where the workflow is configured with a **standard connector** connecting to the next node, this button is labeled **Done**. Select this button to complete the job.



- For Jobs created by the **People - Edit and Approve** node, there are two buttons: **Deny** and **Approve**. Select one to complete the job.



You will be returned to the Job or Job Queue page, based on where you accessed the job from. You will no longer see the job in your Jobs or Job Queue (unless you are also assigned in the next People Node in the workflow), though the job will still appear in your Tracker, if you have previously added it there.

Example 1 - Newspaper Editorial Process Workflow

The Newspaper Editorial Process Workflow, one of the many Sample Workflows available on our **website** (https://sec.kmbs.us/version2/products/dppe/samples-stratus.html#), is a simple workflow that demonstrates the task management capabilities of Dispatcher Stratus.

Workflow Goals

This workflow was designed to streamline the process for writers to submit articles and editors to publish those articles.

Workflow Overview

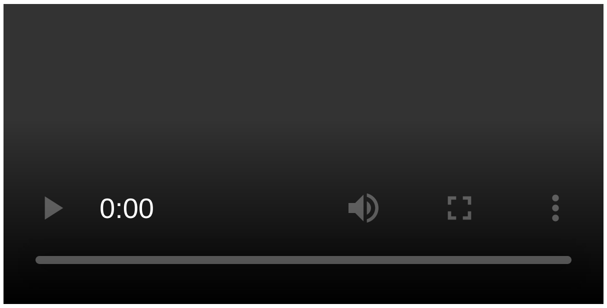
The articles are submitted through **Dropbox**, reviewed and edited using **People Queue** nodes, and sent for final approval in a **People User** node, before being saved in a separate **Dropbox** folder.

Workflow in Action

In this video, you will see:

- How to submit documents via non-MFP collection
- How users can claim Job Queue jobs
- Actions job owners can take, including:

    - Viewing and adding attachments
    - Adding notes
    - Selecting next steps
    - Completing a workflow



Example 2 - IT Request Workflow

This workflow demonstrates an example of how you can use an **Internal Form** node to collect information and begin a workflow.

Workflow Goals

This workflow is designed to streamline the IT request process. Before, many requests were sent via email and lost or deprioritized. With this workflow, steps are clearly defined and easy to follow for all parties involved.

Workflow Overview

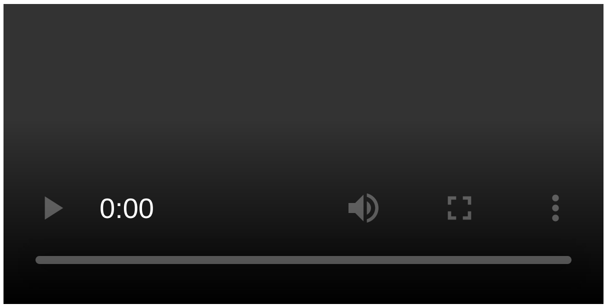
The initial request is made through an **Internal Form** node. The form data is sent to the IT Manager in a **People Group**. The It Manager then sends it to the correct Department Manager in a **People User** node for approval. After it has been approved, it is sent to the IT Technician **Queue** for completion. After the request has been fulfilled, the relevant parties receive an **email** with any vital information.

Workflow in Action

In this video, you will see:

- How users can submit information via internal form capture
- How users can process and approve jobs
- How users can claim Job Queue jobs
- Actions job owners can take, including:

    - Adding notes
    - Selecting next steps
    - Completing a workflow



Example 3 - New Hire Onboarding

This workflow streamlines and clarifies all the steps that are necessary to get a new employee set up within a company’s system.

Workflow Goals

The company’s old onboarding process was inefficient and disjointed; new hires would sometimes wait days for full access to systems, due to requests being missed or mishandled. Dispatcher Stratus allowed the company to create a simple, straightforward workflow so no steps are missed and new hires can be up and running within minutes.

Workflow Overview

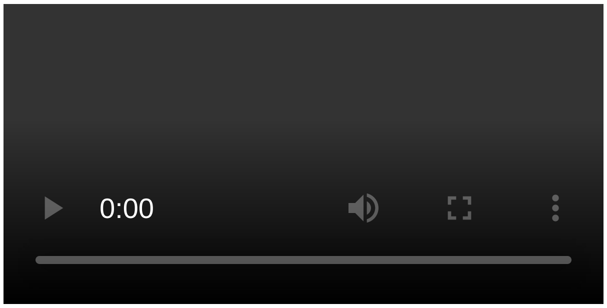
The new hire uses an **External Form** to submit vital onboarding information. The information is reviewed by the **HR Group**, then saved in a **SharePoint Online** folder. The information is also **Converted to PDF** and sent to the IT Department in a **People Queue** node for laptop assignment. Next, the orientation class is scheduled by using a **Form Selector** and a **People Group** node together. Finally, the new hire’s manager reviews, approves the onboarding in a **People User** node, and the new hire is sent an **email** with details about their start date and onboarding.

Workflow in Action

In this video, you will see:

- How users can submit information via internal form capture
- How users can process and approve jobs
- Actions job owners can take, including:
    - Viewing attachments

- Adding notes
- Adding or modifying form data within a job
- Selecting next steps
- Completing a workflow



Using the Workflow Designer

The Dispatcher Stratus 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 Stratus .

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**

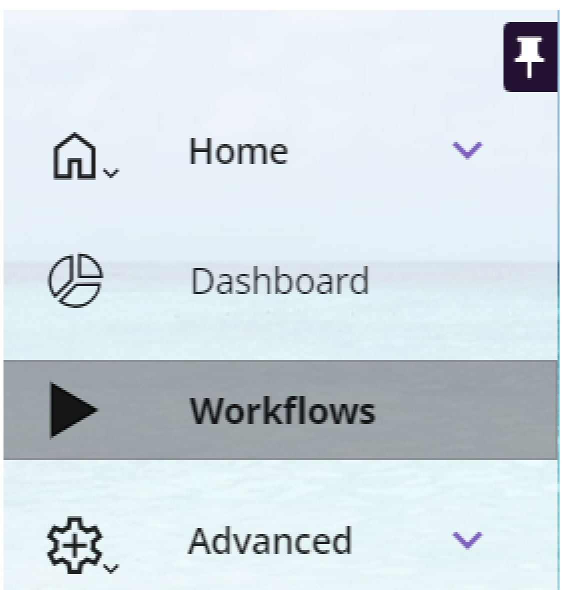
- **Text Properties Panel**
- **Ellipse Properties Panel**
- **Rectangle Properties Panel**
- **Line Properties Panel**
- **Multi Selection Properties Panel**
- **Group Properties Panel**
- **Status bar**
- **Building Workflows with People Nodes**
- **Building a Sample Workflow**

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.

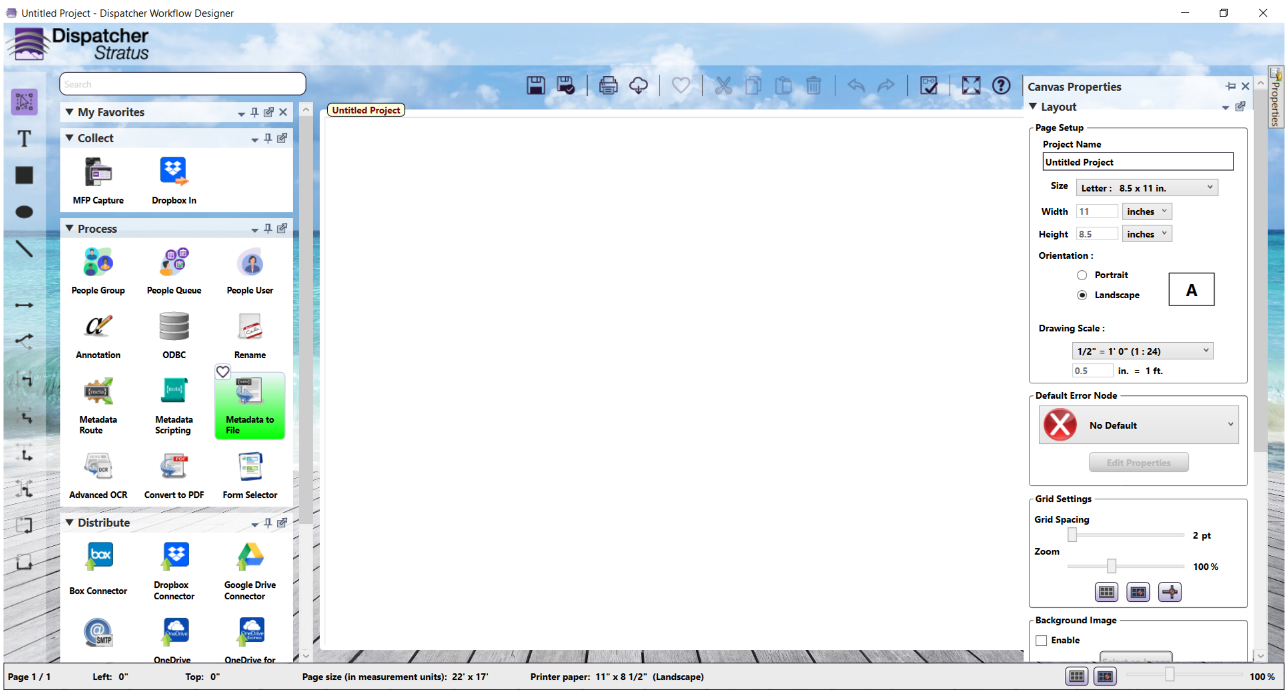
To access the Workflow Designer, do the following:

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



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.

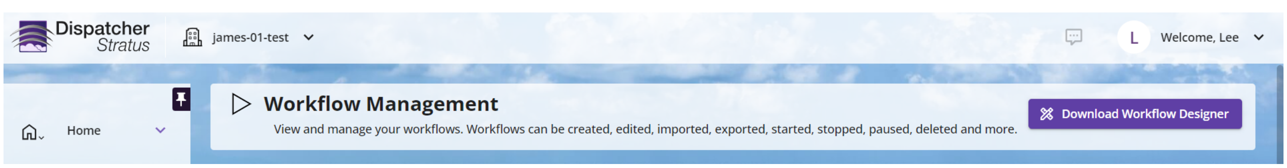
3. Select the **New Workflow** button. This will open the Workflow Designer with a blank canvas. You may also select the **Edit** button on one of the pre-installed sample workflows. This will open the Workflow Designer with the sample.



Installing the Workflow Designer

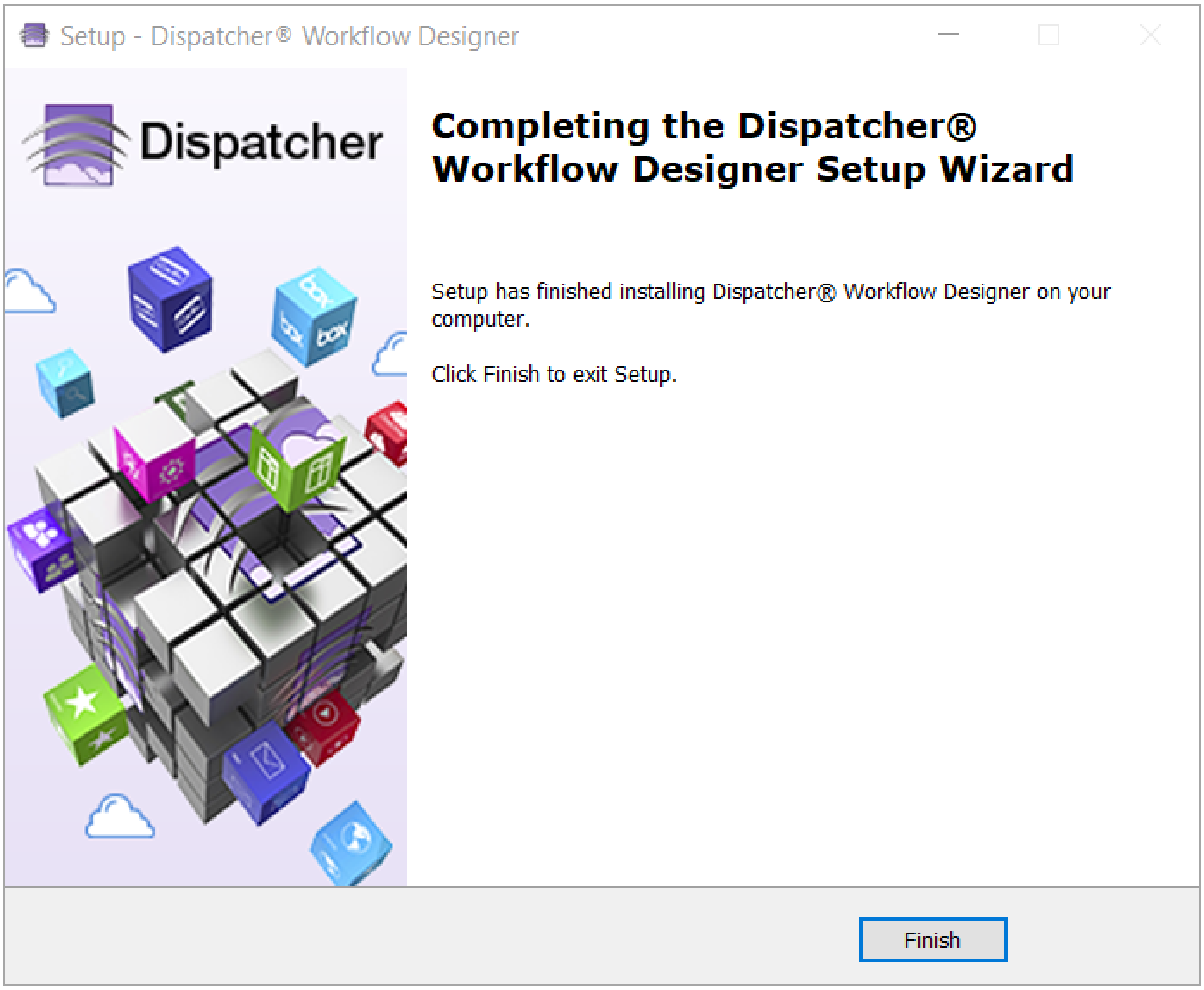
The Workflow Designer can be downloaded from within the tenant. To install the designer, do the following:

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



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

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.



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 Stratus . 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:

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

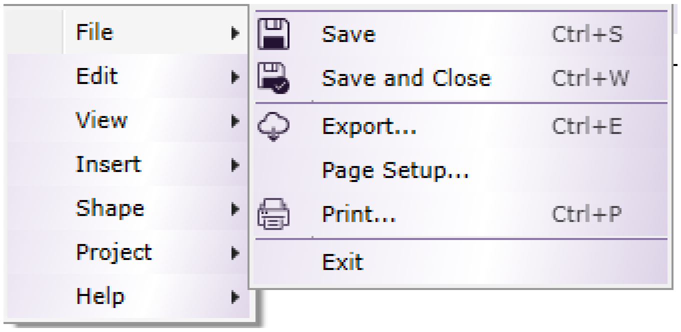
Menu Bar Drop-Down

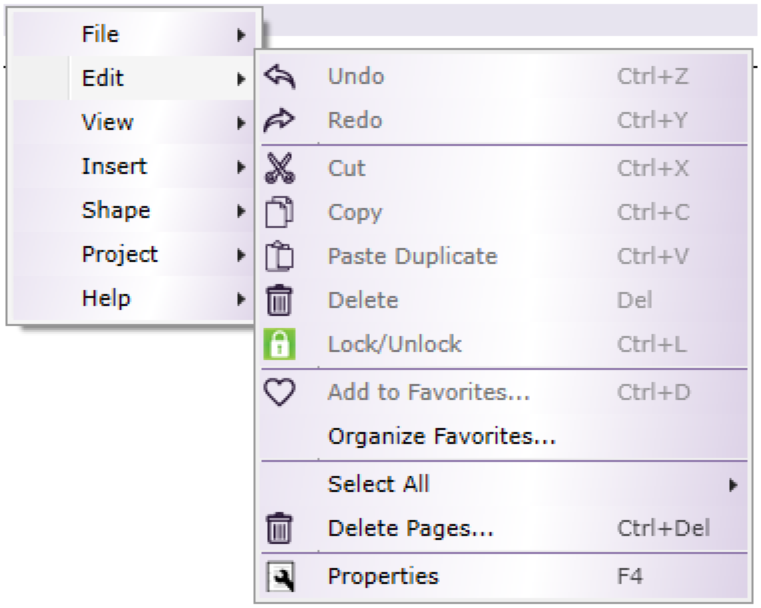
The Menu bar includes a drop-down menu indicated by a triangle located to the right of the Menu bar icons. The Menu Bar Drop-down is a cascading menu tree that provides centralized access to most of the functions available in the Workflow Designer. Note that the Workflow Designer also provides context-sensitive 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.

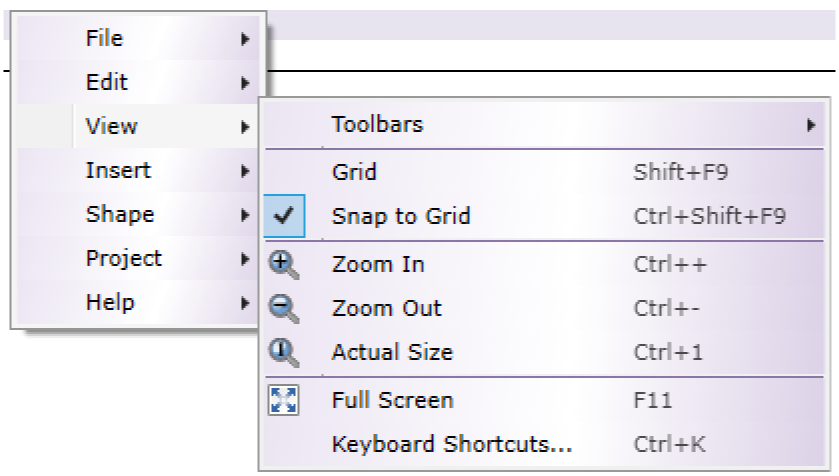
If you click on the triangle on the Menu Bar Drop-Down, the following menu options appear:

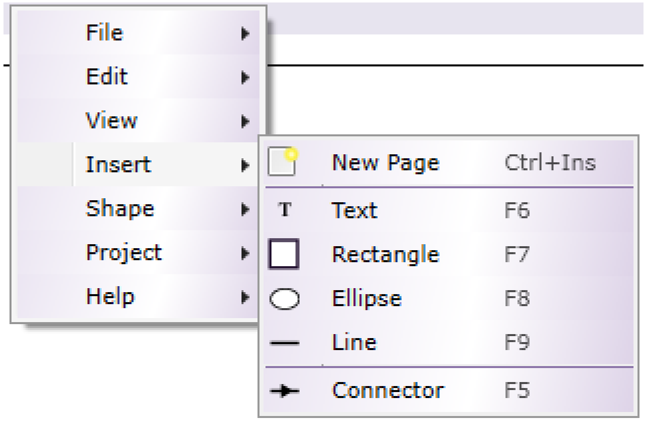
- **File**
- **Edit**
- **View**
- **Insert**
- **Shape**
- **Project**
- **Help**

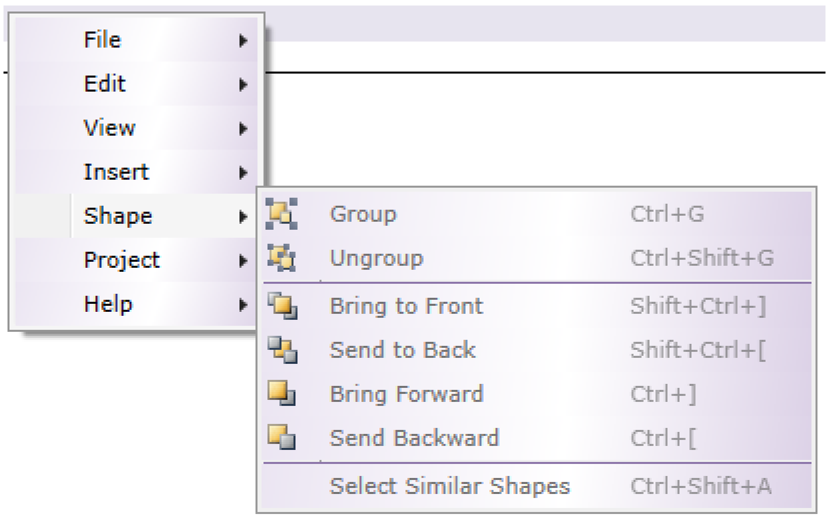
Each menu option displays its own triangle, indicating additional options are available when you click on the menu item. The following illustration shows the options available from the Menu Bar Drop-down menu:

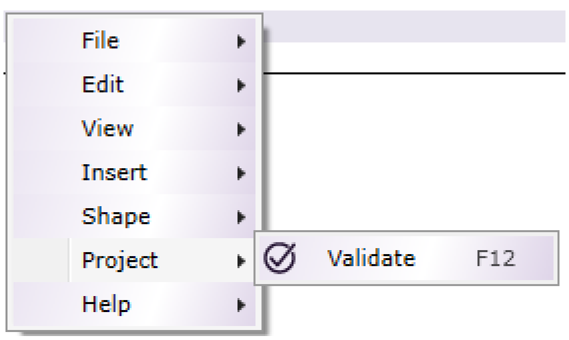

File
Edit
View
Insert
Shape
Project
Help
Save Ctrl+S
Save and Close Ctrl+W
Export... Ctrl+E
Page Setup...
Print... Ctrl+P
Exit

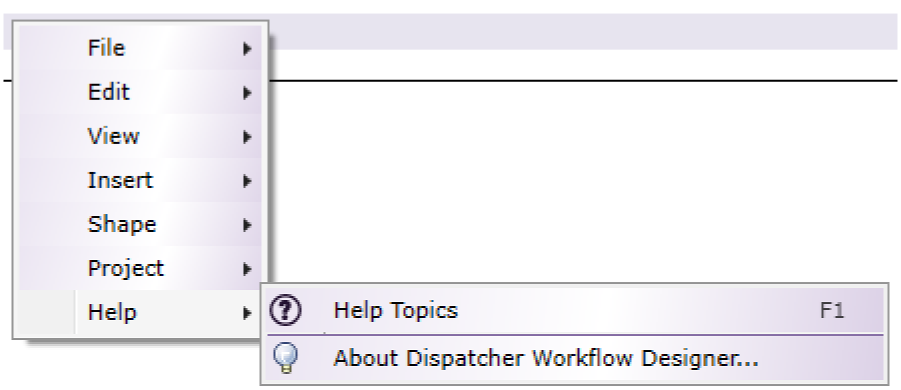

File
Edit
View
Insert
Shape
Project
Help
Undo Ctrl+Z
Redo Ctrl+Y
Cut Ctrl+X
Copy Ctrl+C
Paste Duplicate Ctrl+V
Delete Del
Lock/Unlock Ctrl+L
Add to Favorites... Ctrl+D
Organize Favorites...
Select All
Delete Pages... Ctrl+Del
Properties F4


File
Edit
View
Insert
Shape
Project
Help
Toolbars
Grid Shift+F9
Snap to Grid Ctrl+Shift+F9
Zoom In Ctrl++
Zoom Out Ctrl+-
Actual Size Ctrl+1
Full Screen F11
Keyboard Shortcuts... Ctrl+K


File
Edit
View
Insert
Shape
Project
Help
New Page Ctrl+Ins
Text F6
Rectangle F7
Ellipse F8
Line F9
Connector F5

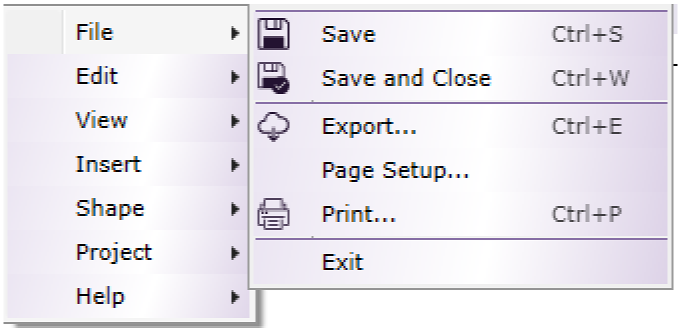

File
Edit
View
Insert
Shape
Project
Help
Group Ctrl+G
Ungroup Ctrl+Shift+G
Bring to Front Shift+Ctrl+]
Send to Back Shift+Ctrl+[
Bring Forward Ctrl+]
Send Backward Ctrl+[
Select Similar Shapes Ctrl+Shift+A


File
Edit
View
Insert
Shape
Project
Help
Validate F12


File
Edit
View
Insert
Shape
Project
Help
Help Topics F1
About Dispatcher Workflow Designer...

File Menu

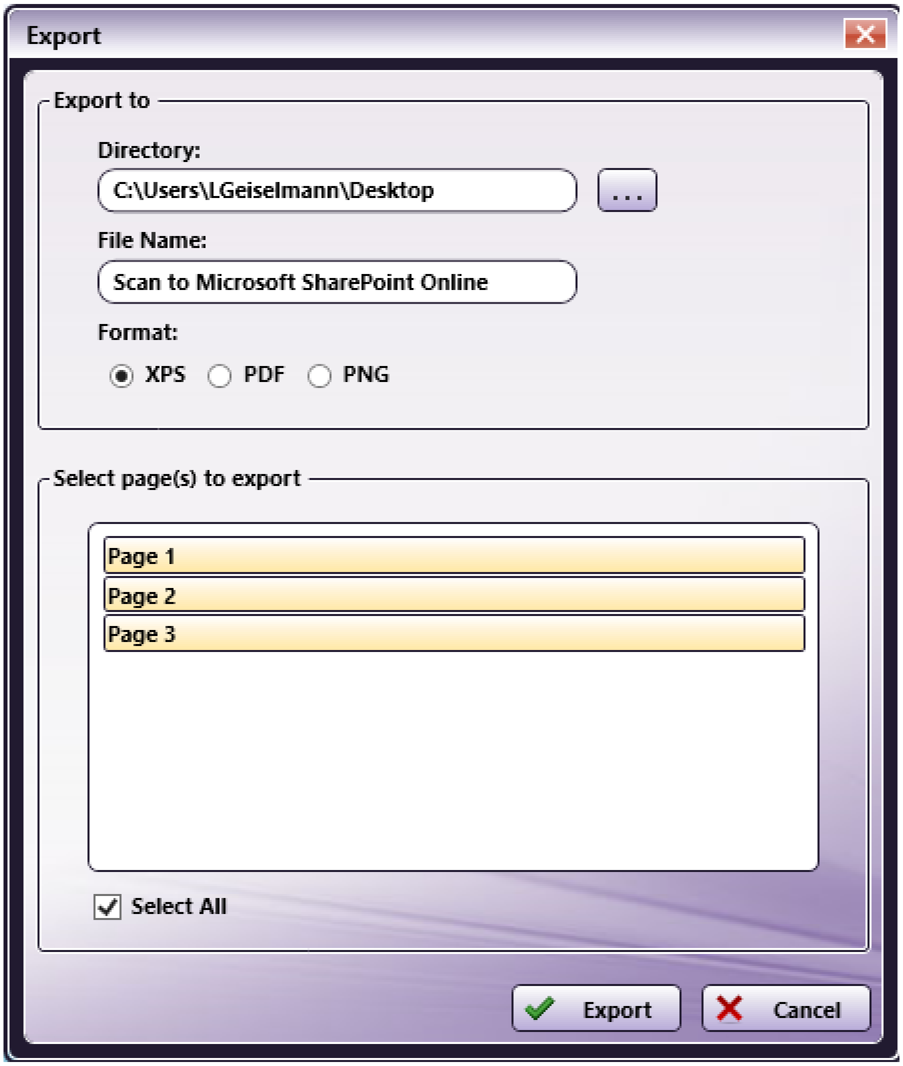
The **File** menu in the Workflow Designer includes Save, Export, Page Setup, Print, and Exit.



- 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:



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.

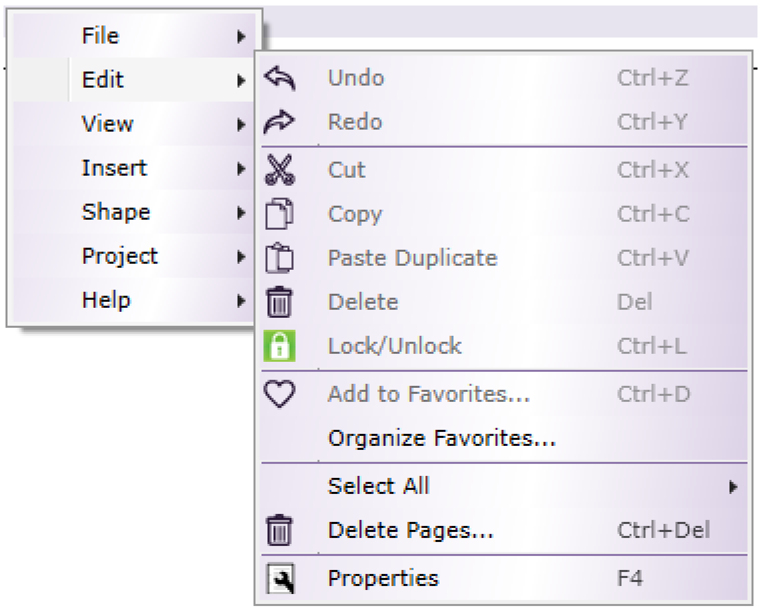
2. If **inches** is selected, set the desired **Drawing Scale**.

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.



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.

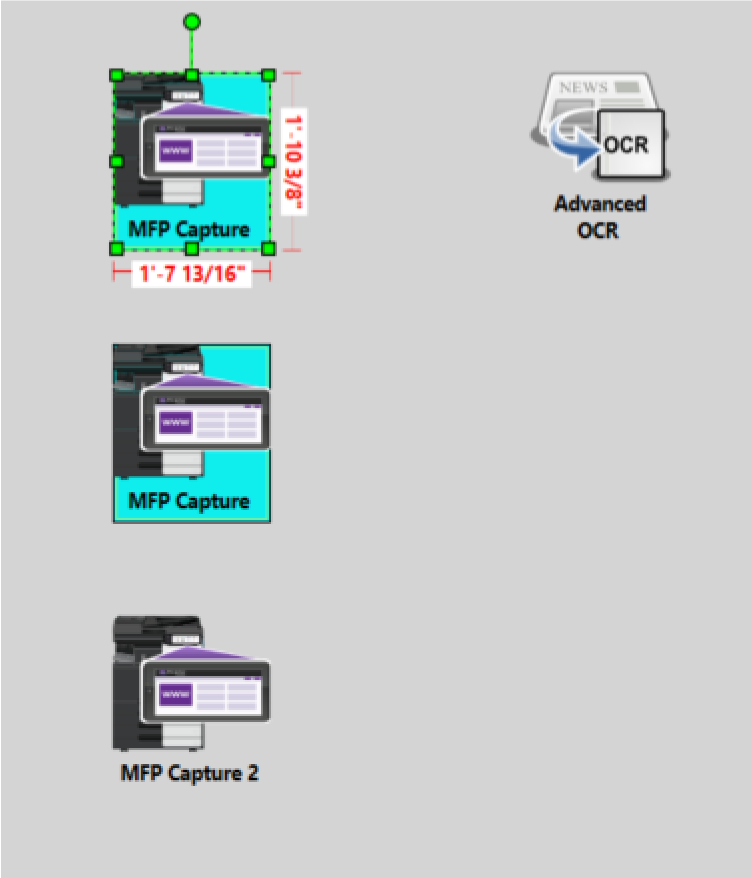
  This option is available only for copied nodes. It creates an additional instance of the node so that the workflow now contains two instances of the same node. Any change to the **configuration** of an instance of the node updates the other instances as well. In this way, you can include multiple instances 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.



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.

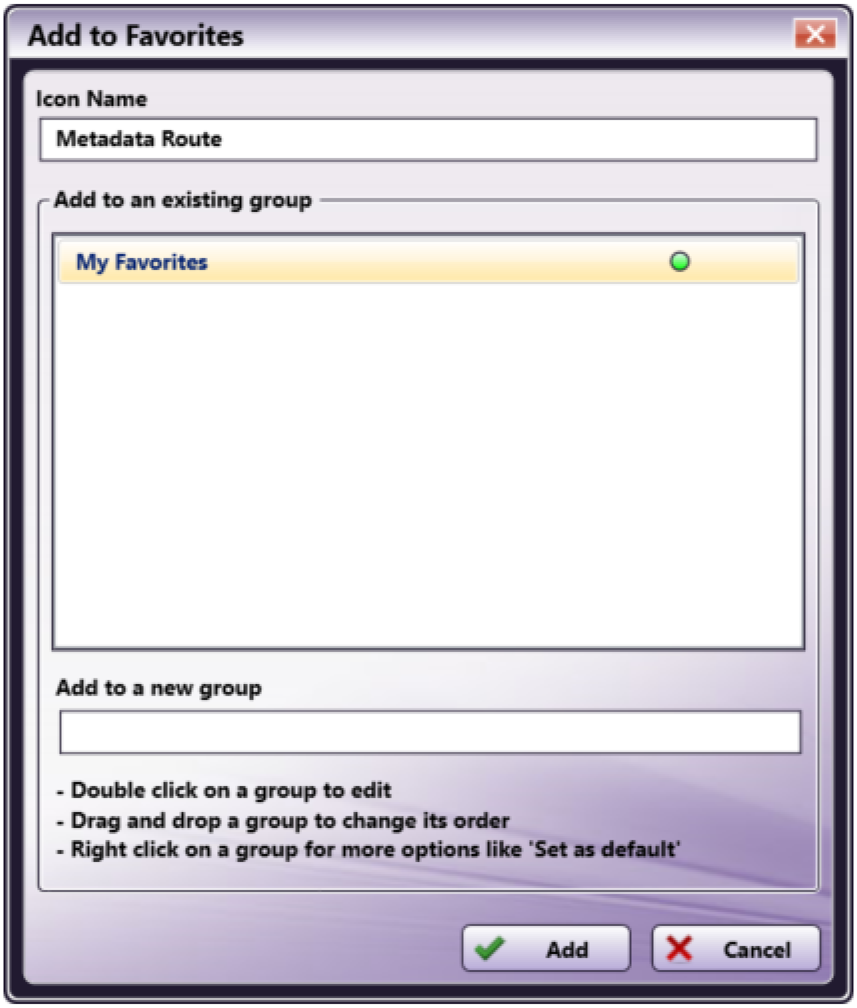
  Caution! Even if an object is locked, it can still be deleted. The "locking" is only positional with regard to the work area.

- 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:



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.

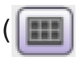
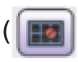
  - To organize the nodes palettes if you have created more favorites groups, right-click on the **My Favorites** palette and select **Organize Favorites...**. In the Organize Favorites window, you can do the following:
    - Drag the palettes in the order that you prefer.
    - **Specify a default Favorites 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 ().
- 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 ().
- 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.

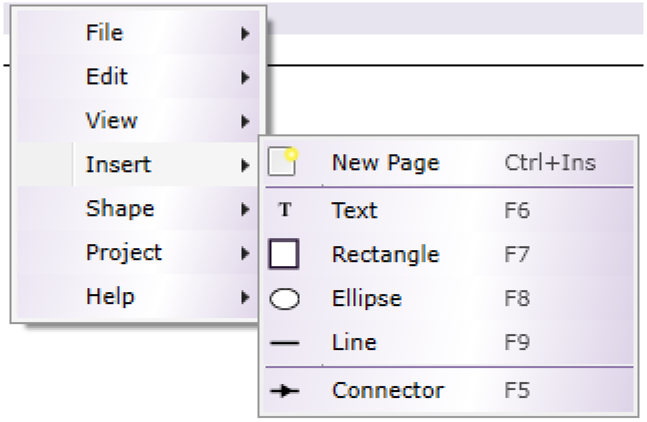
Using the Zoom Function

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.



- 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.

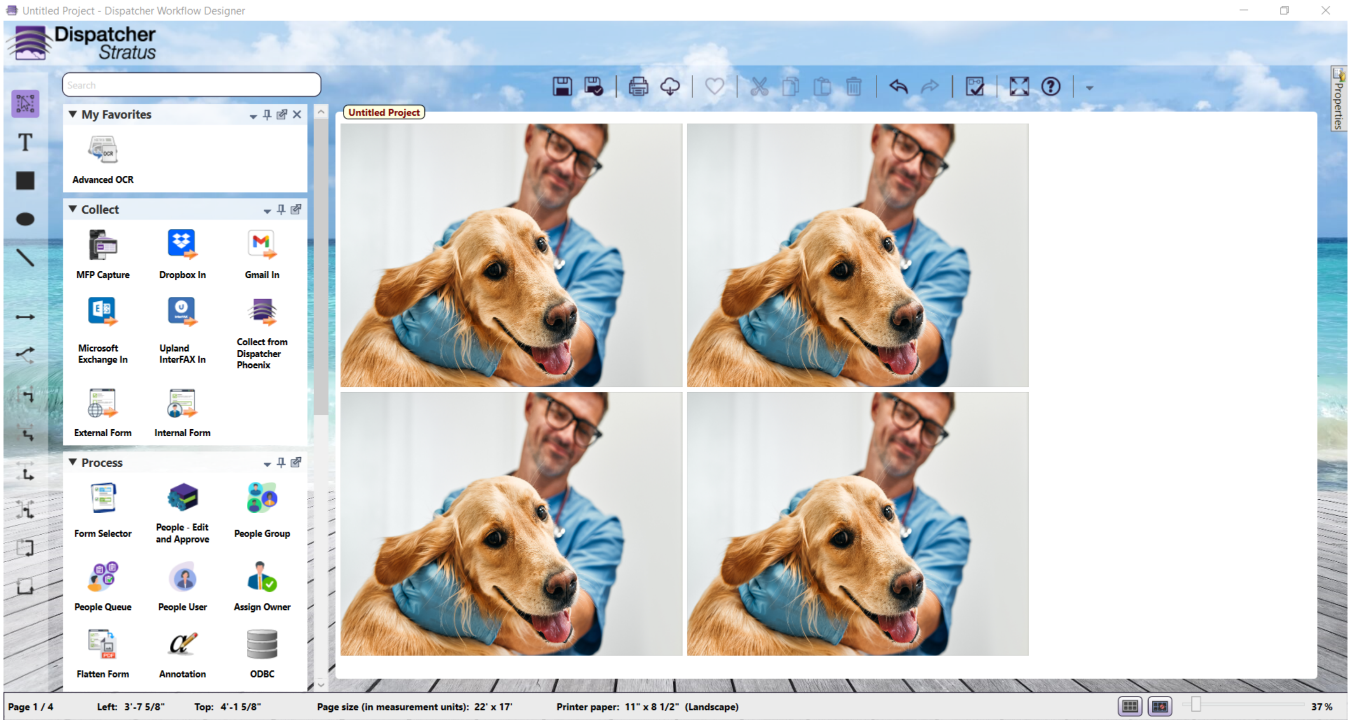
Notes:

- 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).



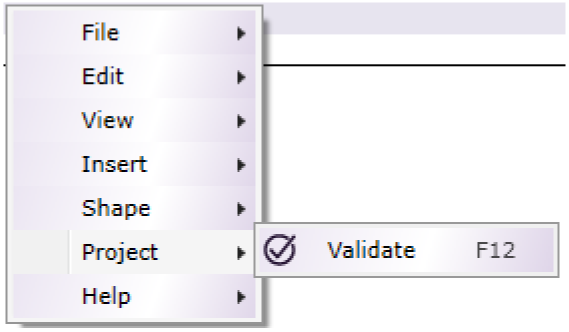
Shape Menu

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.

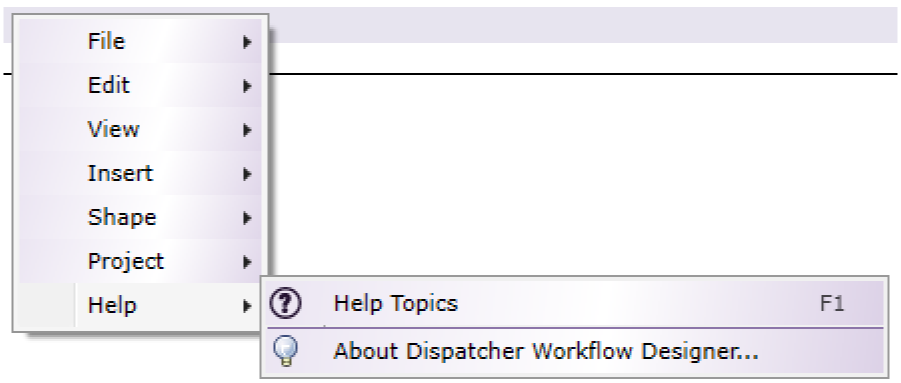
These menu options are also available in the Properties panel in the Layout section.

Project Menu



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

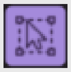
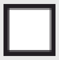
Help Menu



- 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
	**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.
	**Text Box**	Use this tool to add a box with text to the canvas.
	**Rectangle**	Use this tool to draw a rectangle on the canvas.
	**Circles/Ellipses**	Use this tool to draw an oval on the canvas.
	**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.

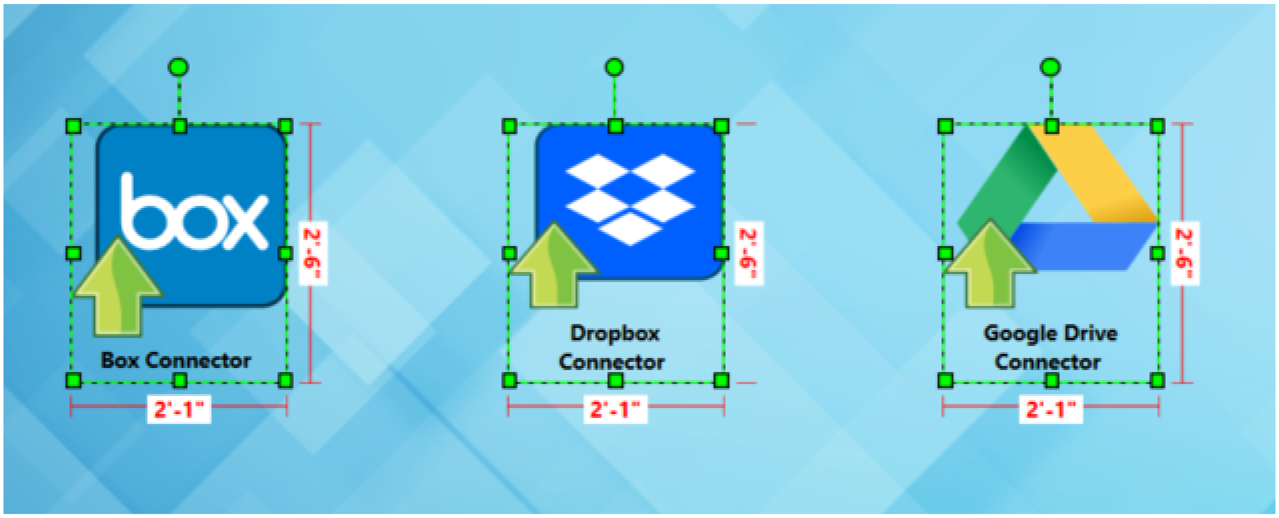
Notes:

- 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).



Text Box Drawing Tool

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

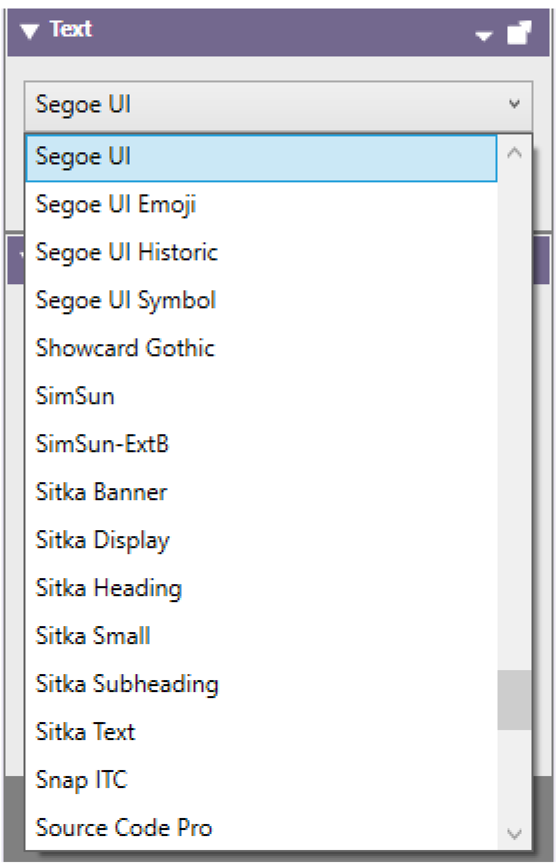
1. Click on the **Text** tool, click on the canvas, and then drag the mouse to draw a text box. Do not worry too much about the size of the text box, as you can adjust it later.
2. Double-click on the text box and type the words you want included with the drawing. The text will wrap to the width of the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



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. By default, connections drawn from a People Node to another People Node are dotted, indicating a **user-selectable transition**.
- 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.

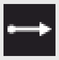
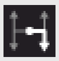
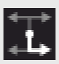
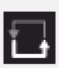
Connector Styles

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
	**Straight**	Straight	Originates from any side of Node A and connects to the closest side of Node B.
	**Bezier Curve**	Curved line	Originates from any side of Node A and connects to the closest side of Node B.
	**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.
	**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.
	**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.
	**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.
	**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.
	**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**.

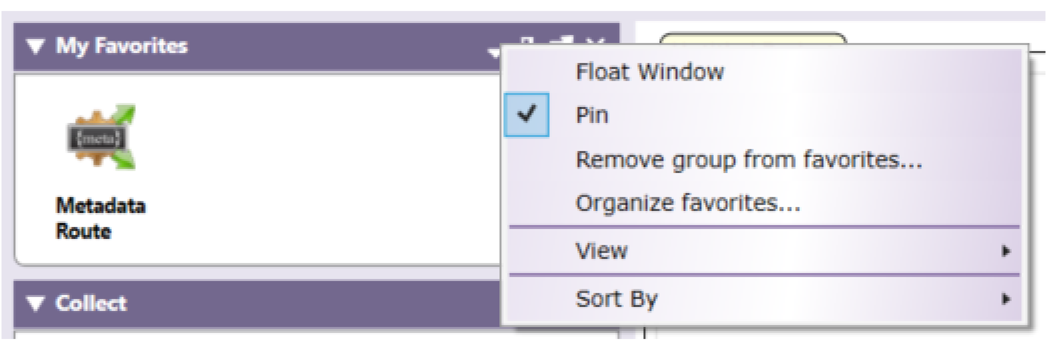
Node Palettes Panel

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:



Using this menu, you can do the following:

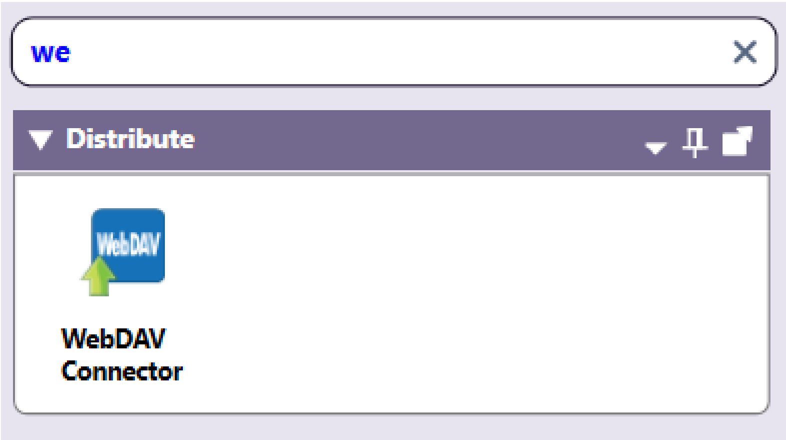
- Select **Float Window** to move the palette window anywhere around your Desktop.
- Select **Pin** to keep the palette open. Note that a pinned node palette will become unpinned when collapsed. Any node palettes that were pinned before the Workflow Designer starts will be in an open state when the Workflow 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**:



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.

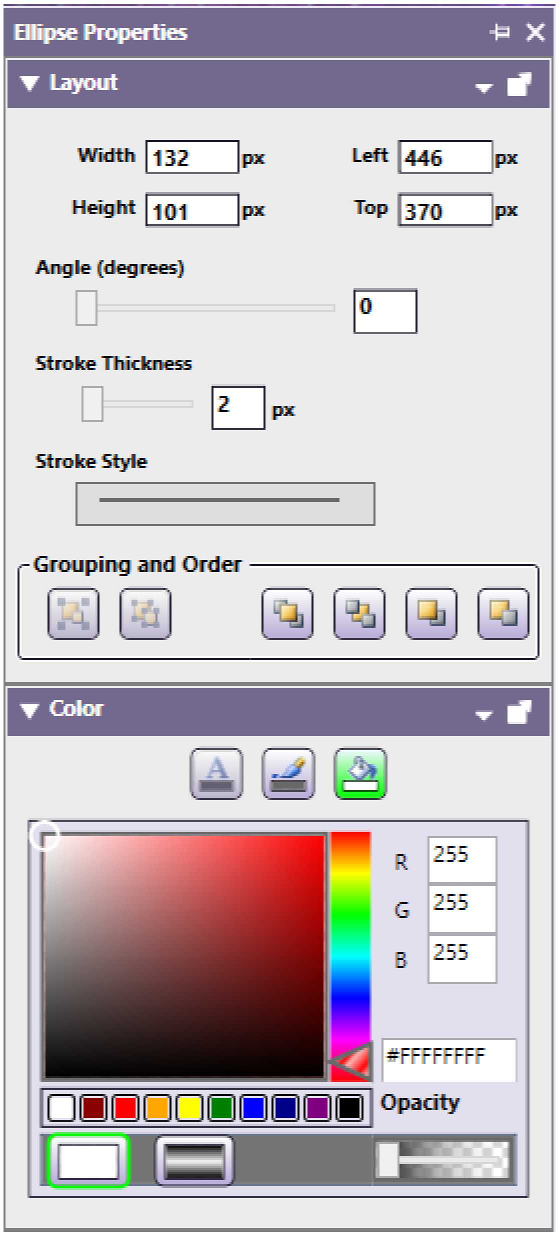
The Canvas area can be resized by clicking and dragging the boundary between the left side of the Canvas area and the right side of the Node Palettes area.

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.



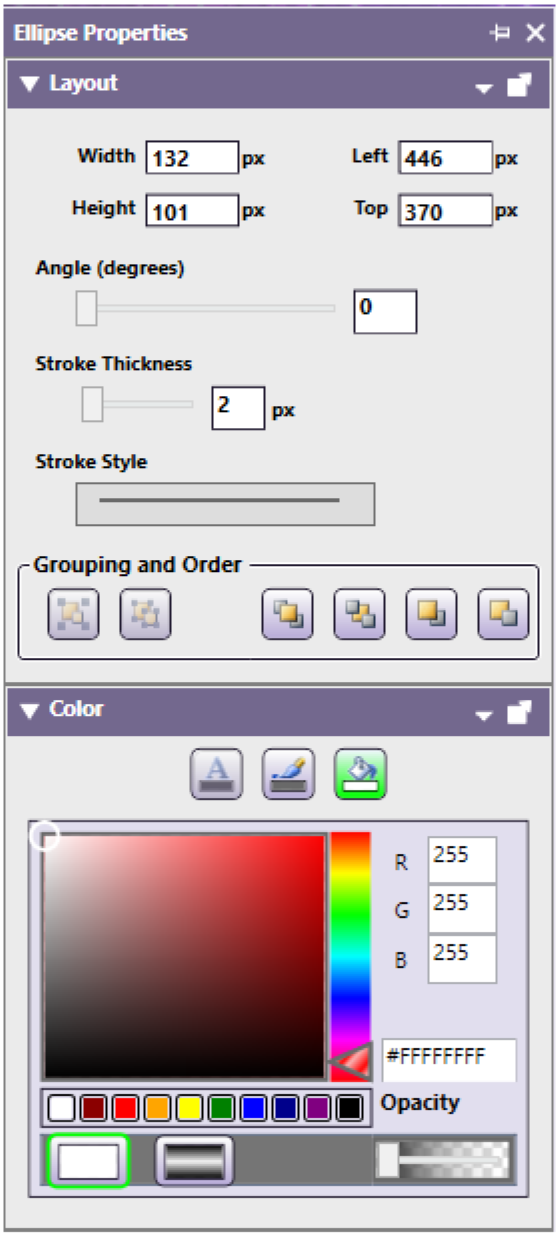
Elements of the Properties Panel

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.



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.

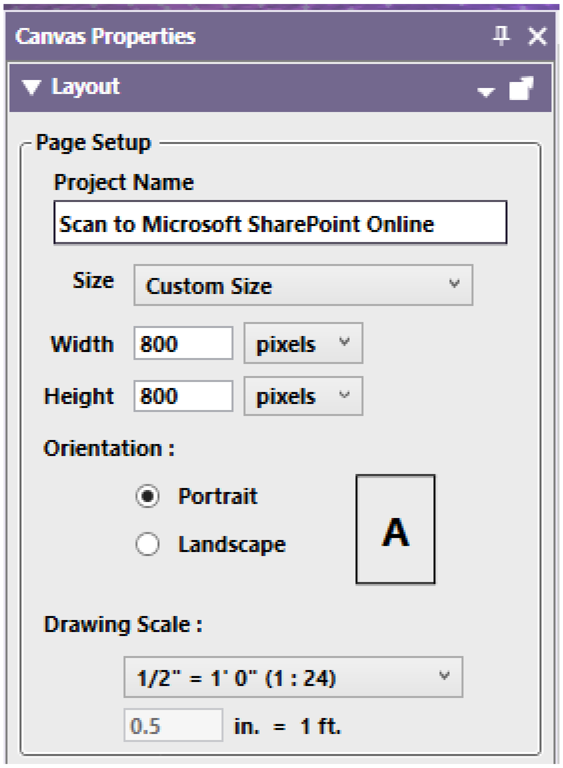
In the illustration above, notice that the Ellipse Properties panel includes a title bar and two sub-panels: the Layout and Color panels. The Text panel is not available, as ellipses cannot contain text.

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:



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

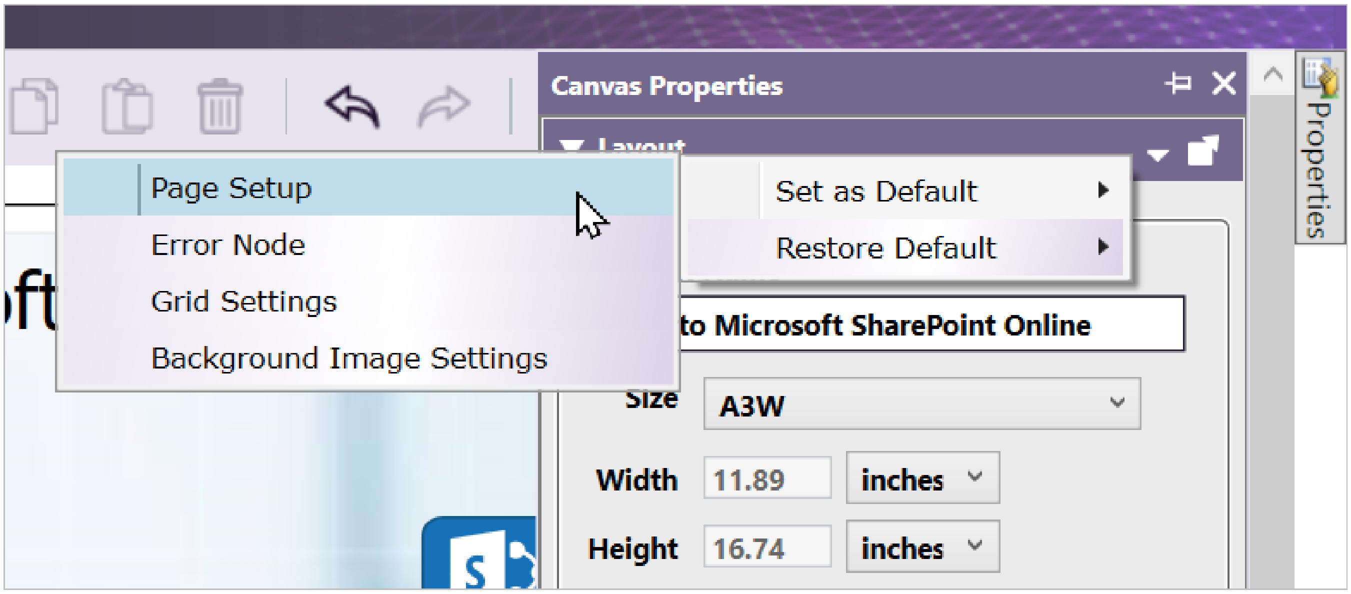
If you modify any settings on the Properties panel, you can save the configuration as the default settings for the Workflow Designer. The configuration will then appear in the panel the next time you access the panel, and thereafter until you modify the default settings again. You can also return the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

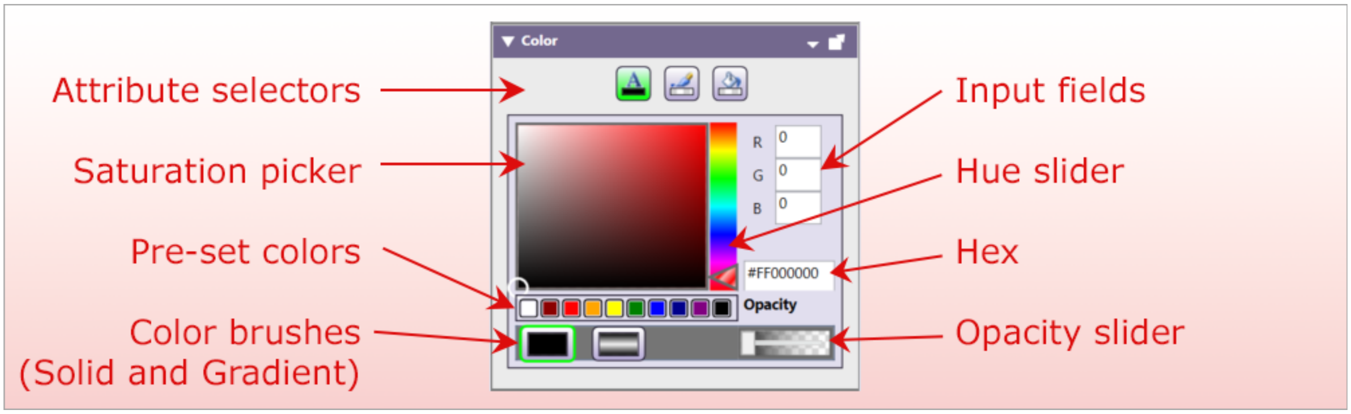


- **Restore Default** - To restore the settings in a sub-panel of the Properties panel (for example, the Text panel) back to the application's default configuration, access the Default Properties menu for the sub-panel containing the setting and select **Restore Default** from the menu that appears.

  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:



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.

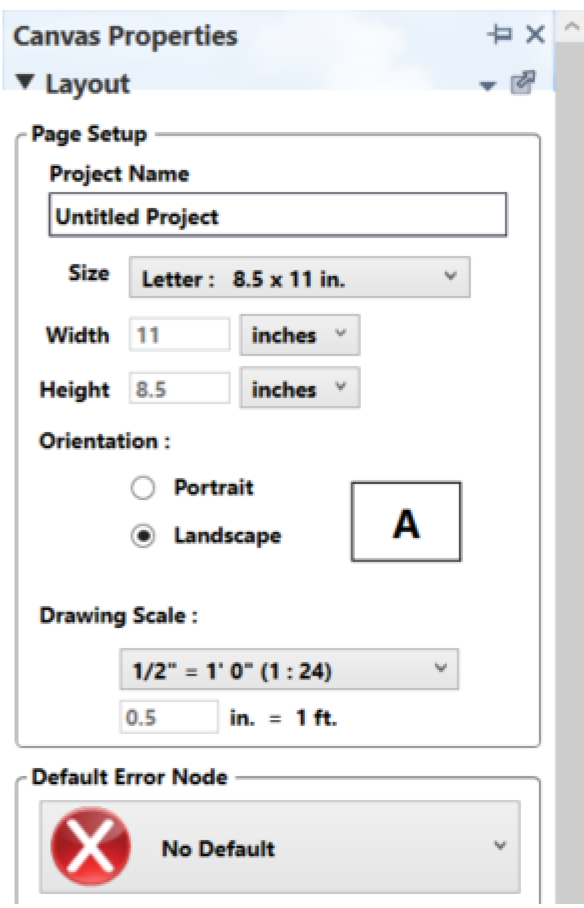
  Note: If modifying black (0, 0, 0,) or white (255, 255, 255), the Hue slider does not change the RGB values.
- **Input fields** - These fields display the RGB color values (red, green, and blue) of the selected object attribute. To modify a value, click in the field and enter a value from 0 to 255.
- **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.

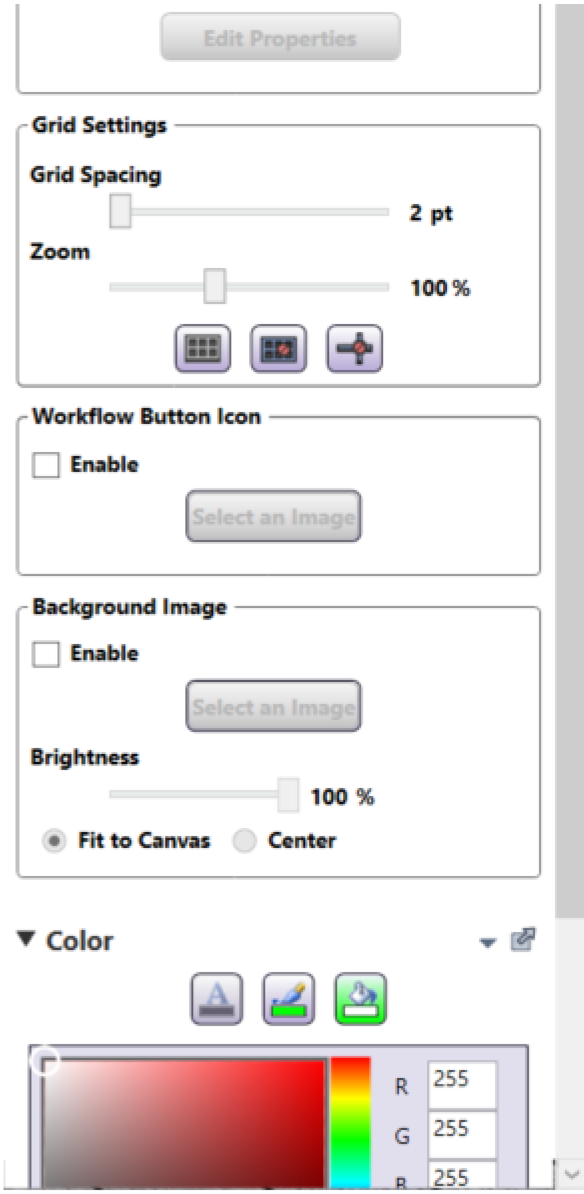
- **Opacity slider** - Color opacity is a value from 1 to 100 that indicates the color transparency of the selected attribute. A color opacity value of 1 fully obscures anything on the canvas positioned beneath the attribute. A value of 100 renders the color completely transparent. To adjust an attribute's 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:





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.

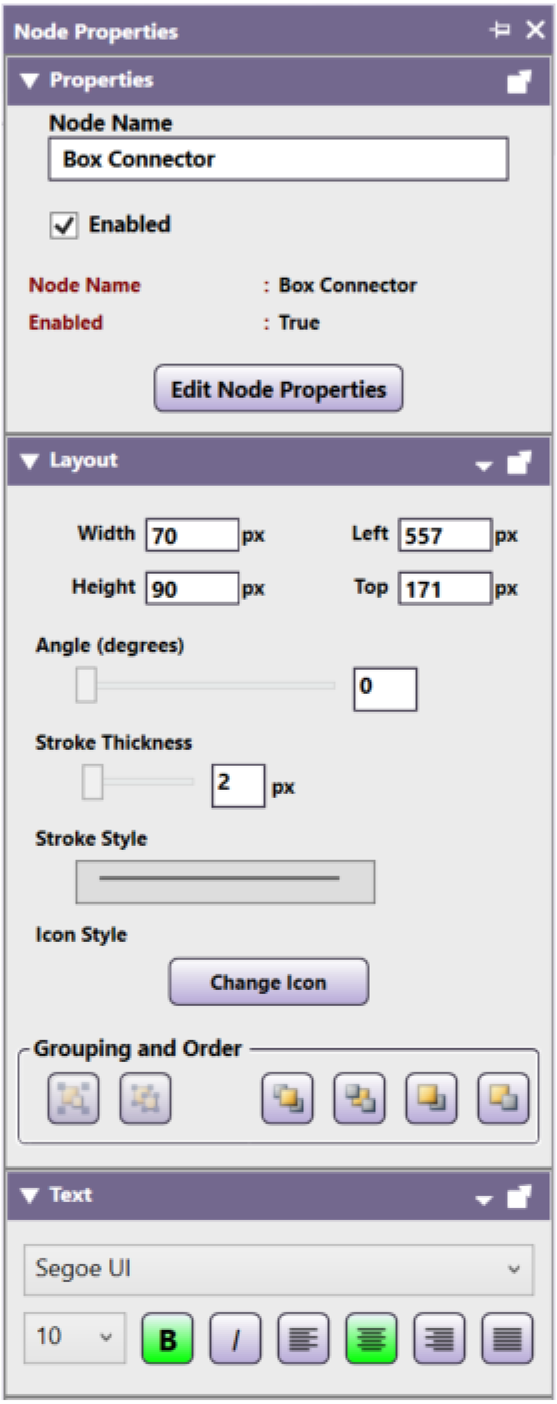
Color Panel (Canvas)

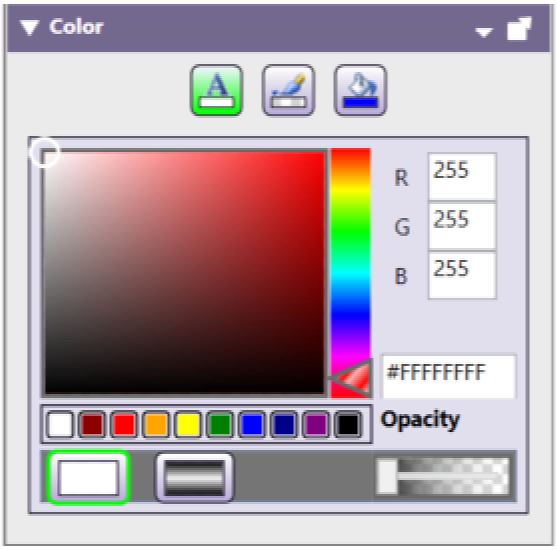
The **Color panel** is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the canvas. You have the following options:

- 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:





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)

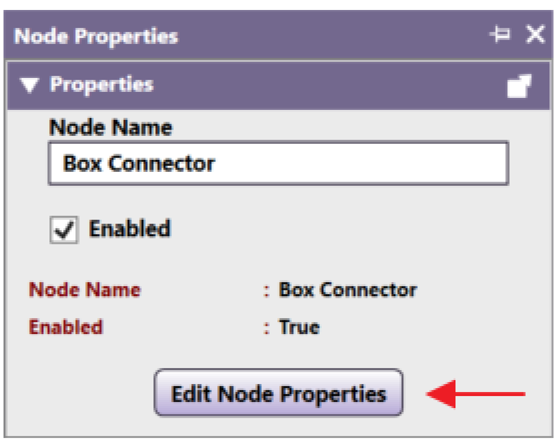
The Color panel is a sub-panel of the Properties panel. Use the Color panel to modify the colors of the attributes of the selected node. You have the following options:

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

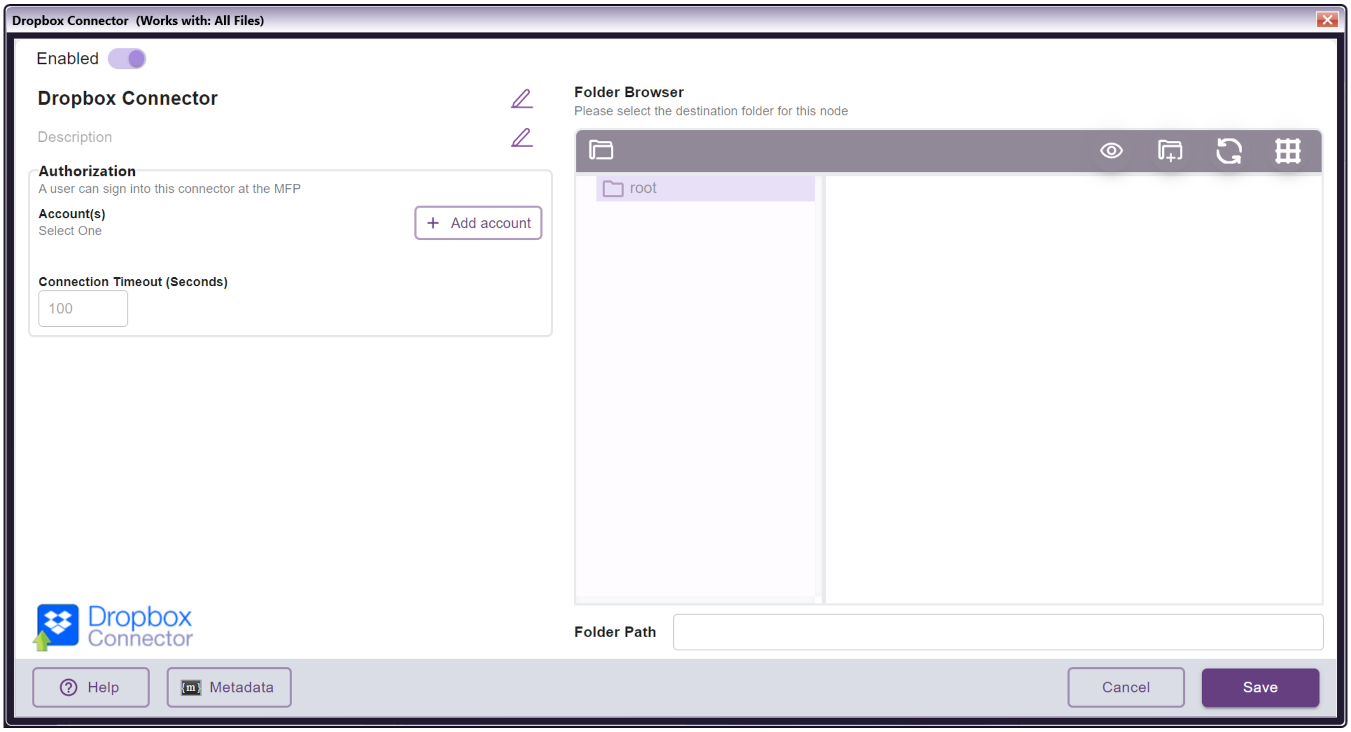
Node Configuration Window

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:



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:



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.

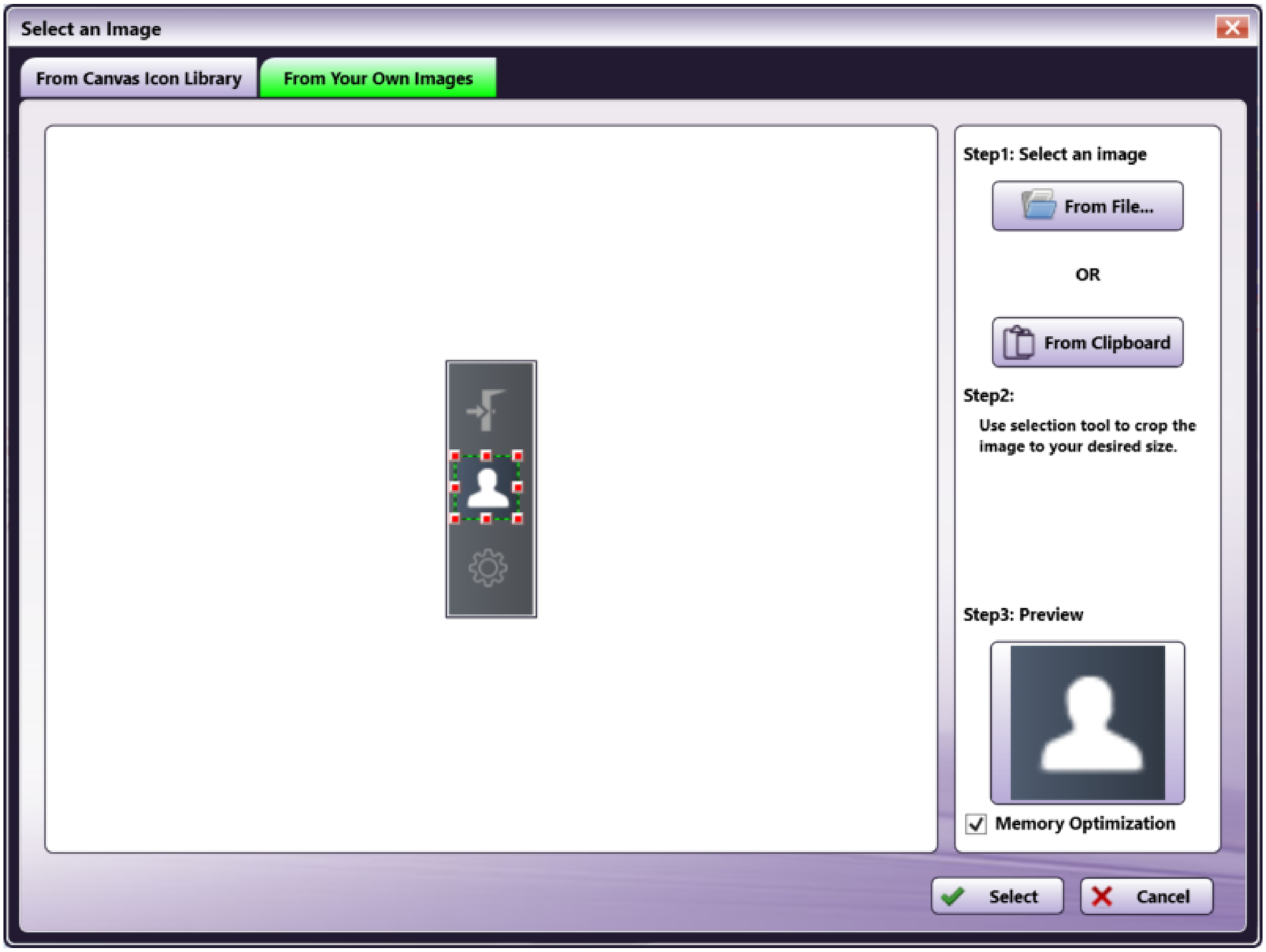
To change a node's icon, do the following:

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.

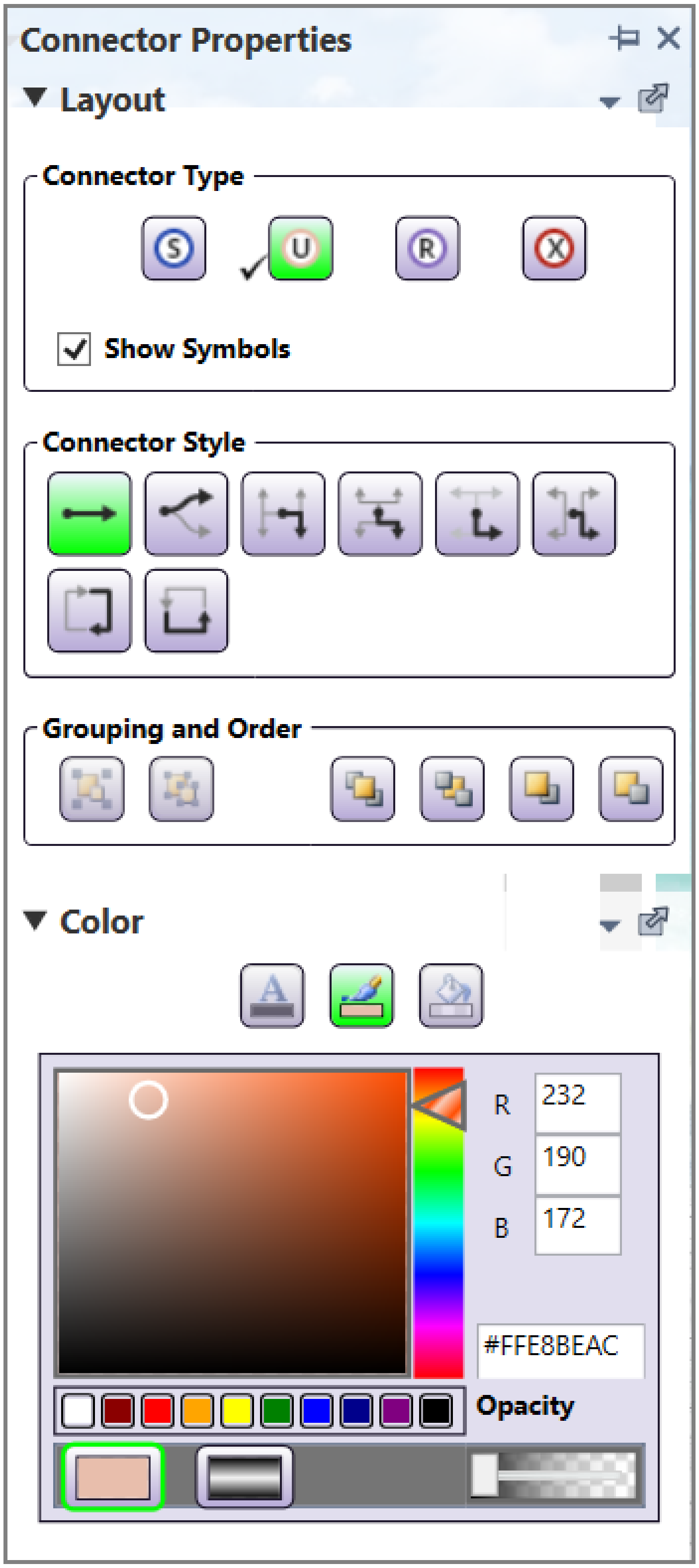
      Caution! If you uncheck this box, the image will be enhanced, but it may increase memory usage enough to cause your system to slow down. To upload a picture with higher resolution, uncheck the box, but be aware that a better image will use more resources on your PC.

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



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:



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.
- **User-Selectable** - This connector type is selected automatically when drawn between two People nodes. You may change a Standard connector to a User-Selectable connection if the connector is between a People node and an automation node. This connector indicates that a Dispatcher Stratus user has the option of choosing the next destination for documents or jobs within the portal.

  Note: The Standard and User-Selectable connectors are mutually exclusive.
- **Reject** - This connector indicates the path a document or job will take if the assigned user rejects it.
- **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.

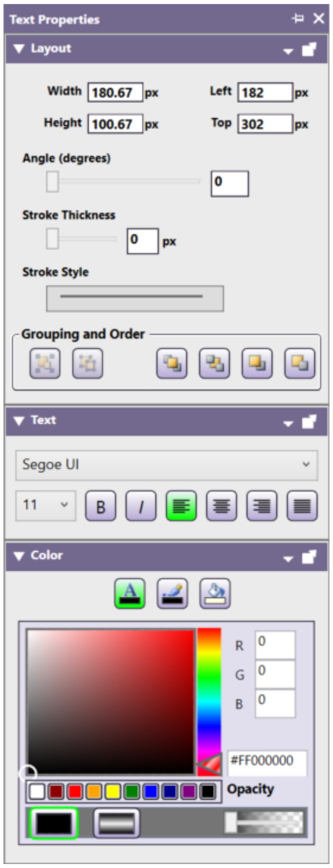
Color Panel (Connector)

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:



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)

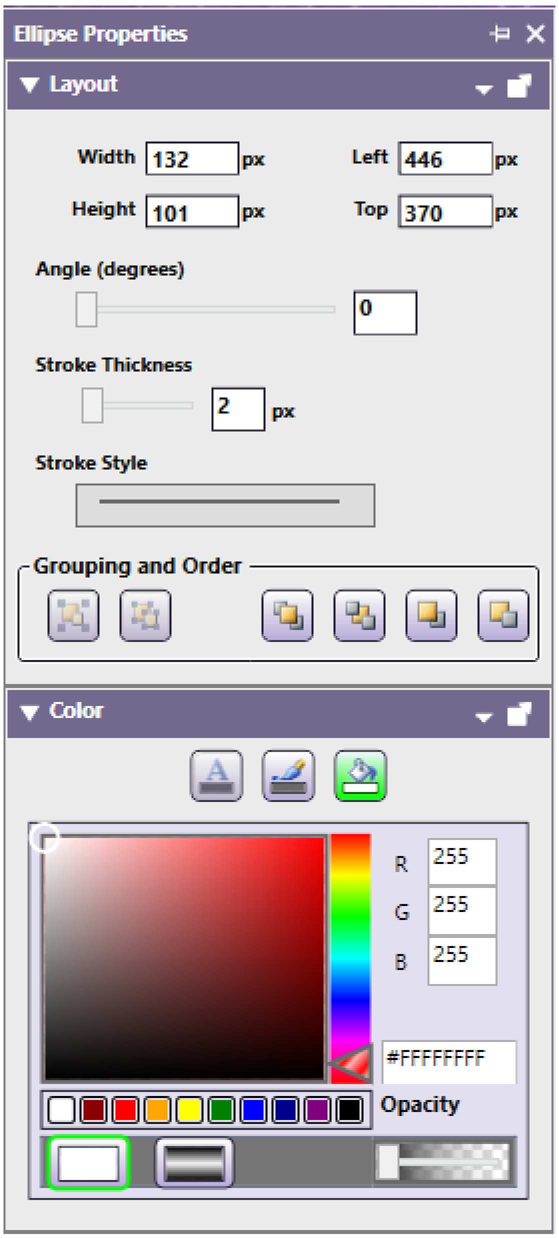
The **Color panel** is a sub-panel of the Text Properties panel. Use the Color panel to modify the colors of the attributes of the selected text box. You have the following options:

- 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:



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.

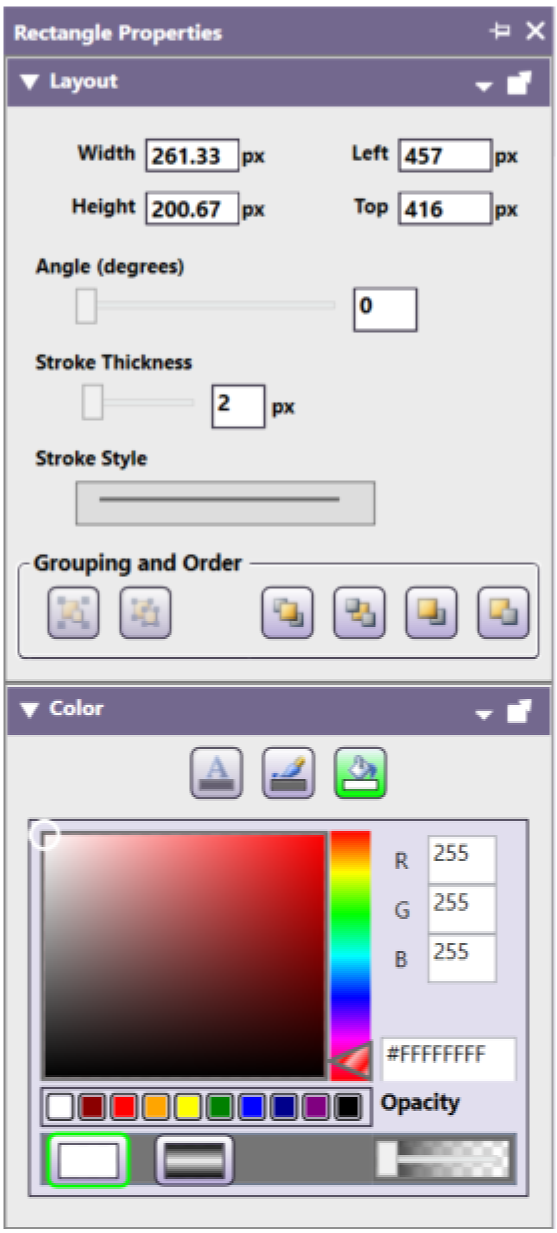
Color Panel (Ellipse)

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:



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.

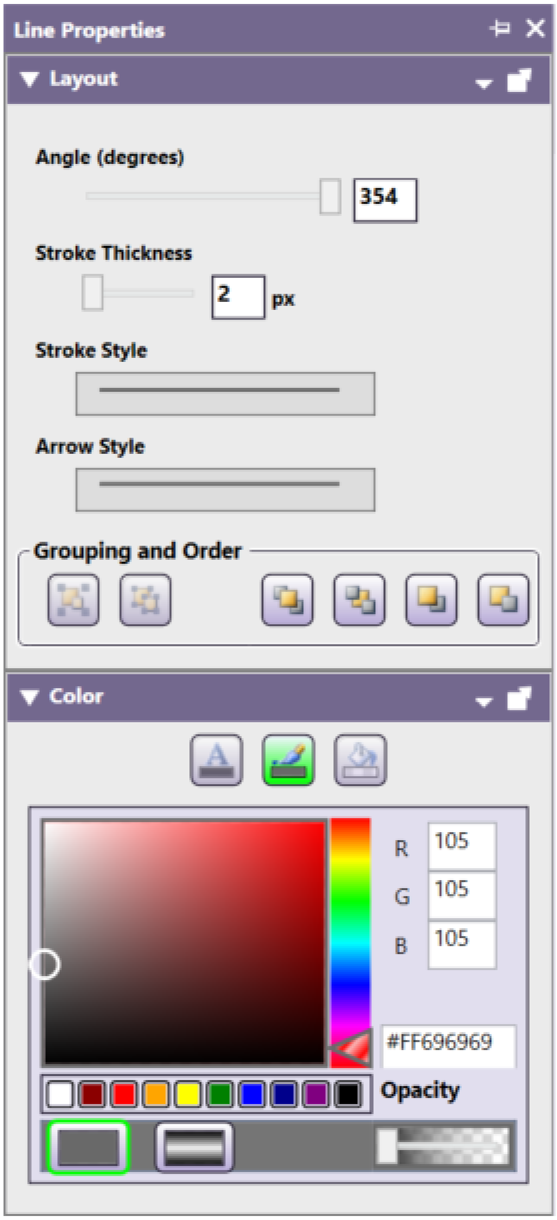
Color Panel (Rectangle)

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:



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.

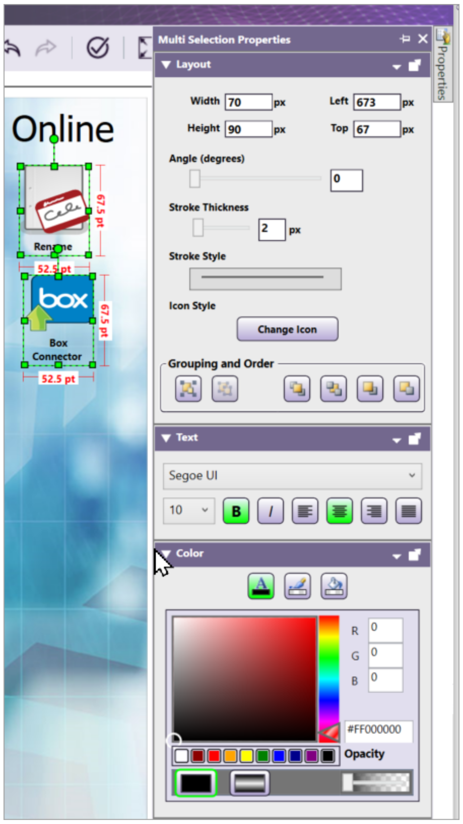
Color Panel (Line)

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:



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.

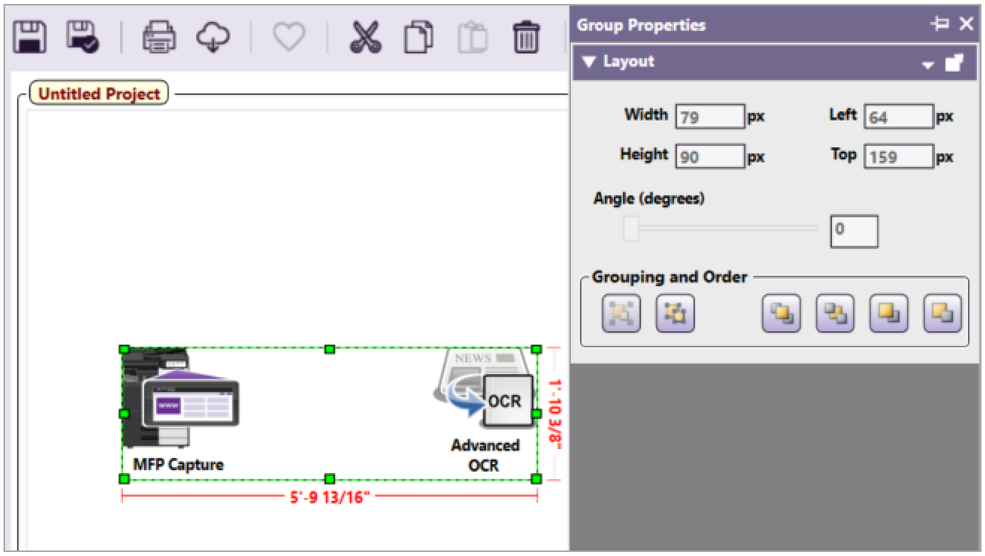
Color Panel (Multi Selection)

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:



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).

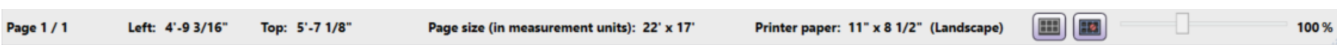
- **Grouping and Order** - Use these buttons to modify the grouping and order of the selected objects.

  - 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.



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)

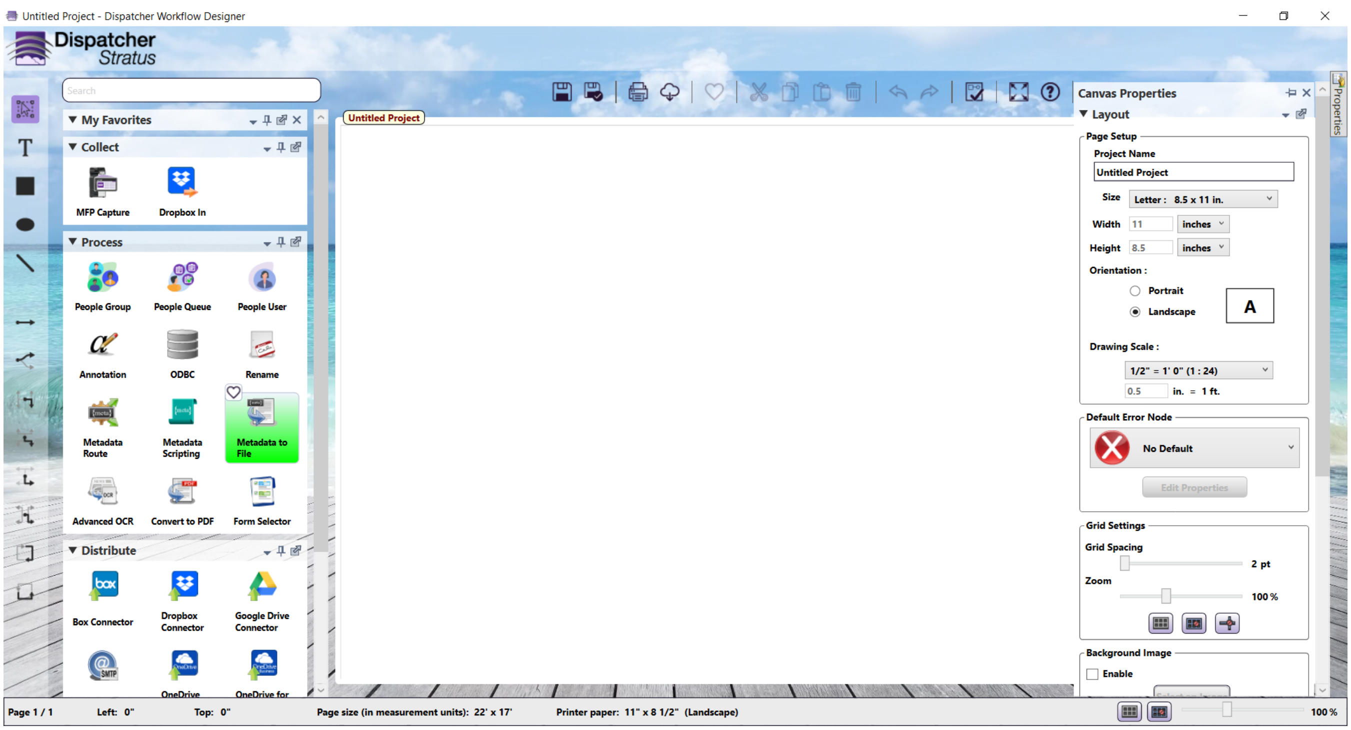
- **Snap to Grid** (described in the **View Menu** section above)

- **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.



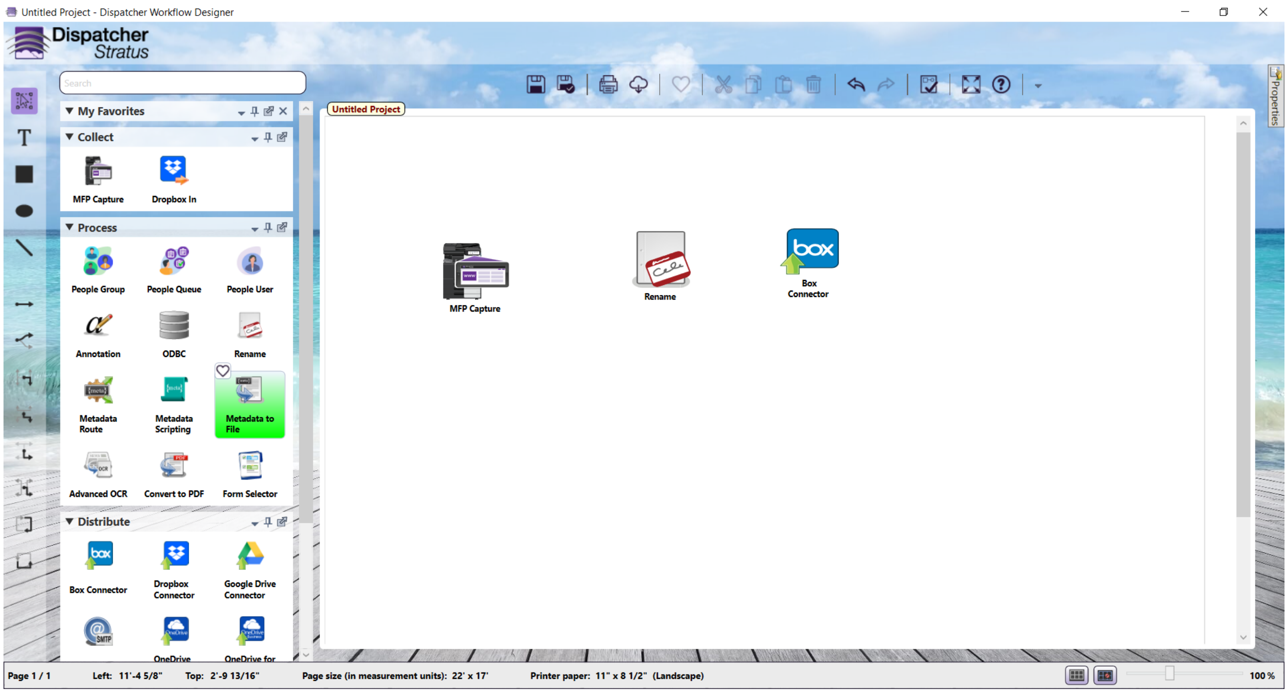
The left side of the window contains palettes. Click on the pushpin to keep a node palette open. The node palettes are divided by their function to **Collect**, **Process**, or **Distribute** documents. In addition, you can favorite nodes, which will cause them to appear in the **My Favorites** palette.

Creating a Simple Workflow

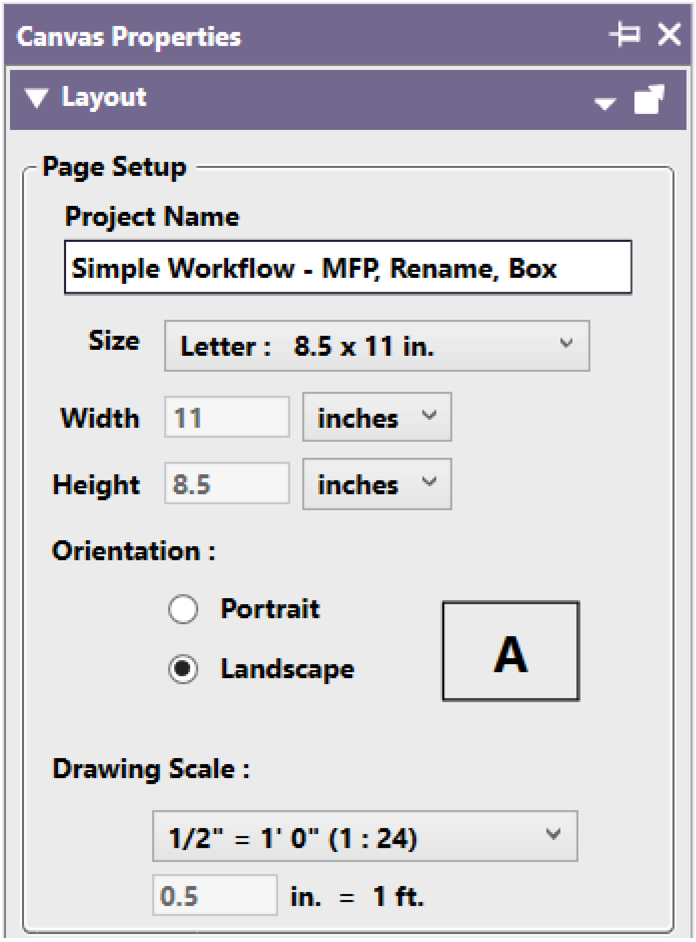
1. To begin, open the Collect nodes palette and click on an **MFP Capture node**. With the node selected, click on the canvas drawing area and drag the mouse to create and size the node. For more information on how to configure the node, visit the **MFP Capture** page.

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**  tool to make any node larger.

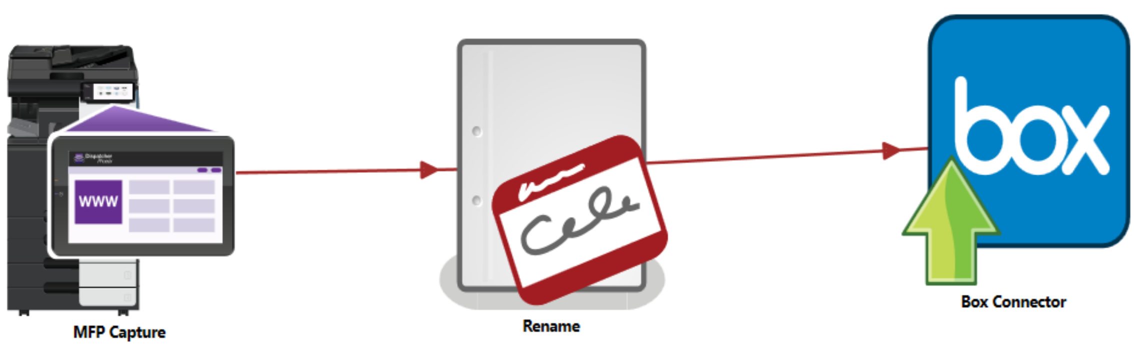


4. Double-click on the canvas work area to open the Properties panel and name your workflow, as in the following illustration:



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.



6. Select the **Validate** icon ( ) or select **Validate** from the **Project** pull-down menu to validate the workflow (this can be done now or at a later time).
7. Select the **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.

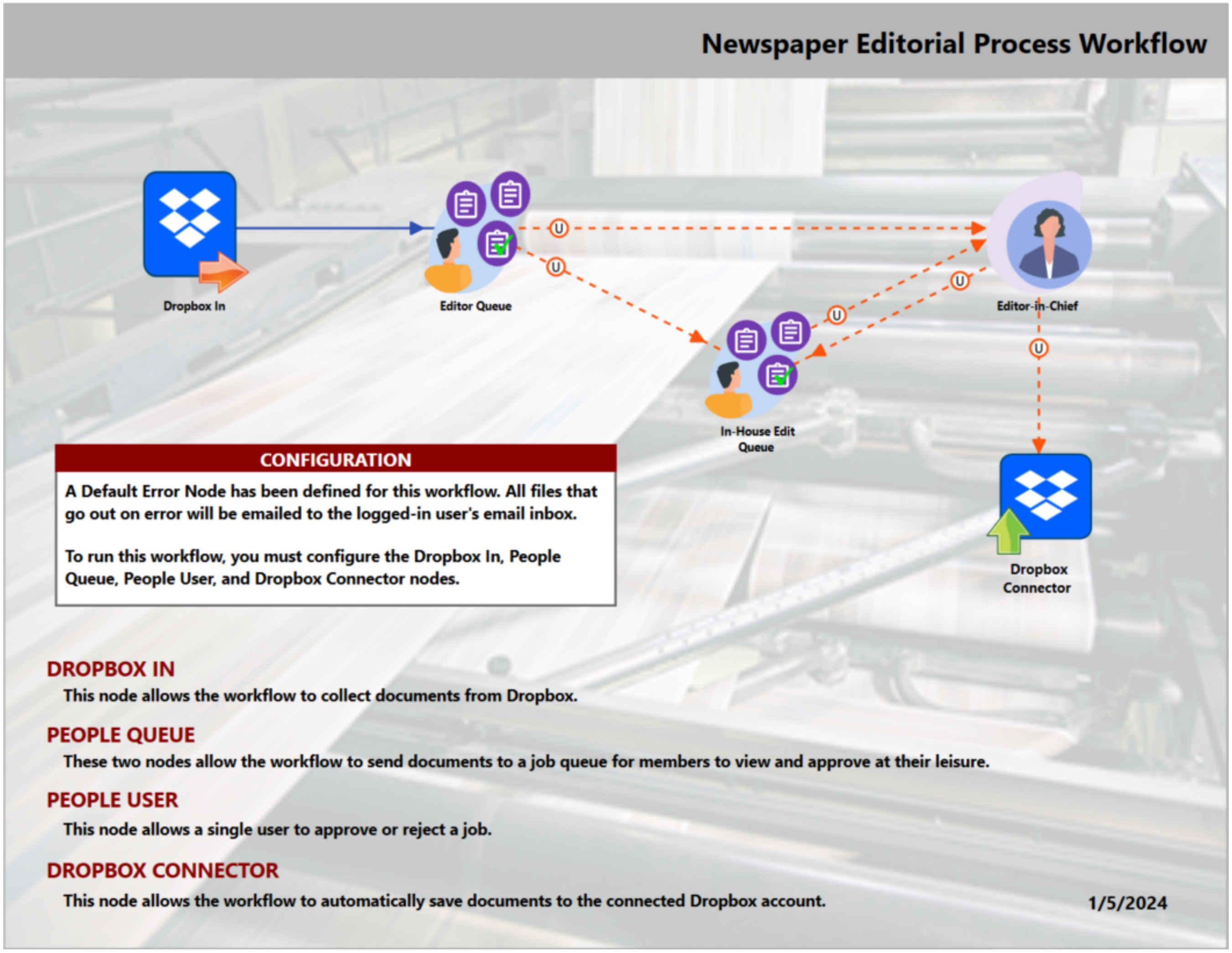
Building a Workflow with People Nodes

Dispatcher Stratus' People Nodes allow for human interaction during workflow processing through the Dispatcher Stratus portal. The People Nodes include:

- **People - Edit and Approve** - The People - Edit and Approve node is typically used for jobs that only need approval and not other interactions. This node will send a job to a licensed tenant member, who can then view and/or edit documents in the workflow. For example, you can include this node in a workflow in which a default group member sends a request to a tenant group to review and approve/deny a scanned document and the document's metadata generated by the workflow.
    - For example, you can include this node in a workflow in which a default group member sends a request to a tenant group to review and approve/deny a scanned document and the document's metadata generated by the workflow.
- **People Group** - The People Group node is typically used for jobs that are usually handled by one individual but can be completed by any member of a group. This node will send jobs to a User Group's Default Member. That user can then reassign the job to another user in the group (depending on the node configuration) or complete the job themselves and send it to the next step in the workflow.
    - For example, a member of the Accounting team may be in charge of invoices. That person would be the Default Member and receive every invoice job. But that person could reassign invoice jobs if workloads needed to be adjusted.
- **People Queue** - The People Queue node is commonly used for jobs that do not need to be completed by a specific individual. Use the Queue Node to send jobs to a Dispatcher Stratus queue, where anyone with access to the **job queue** can claim the job.
    - For example, external job applications may all go to a general hiring Queue for vetting. Anyone on the Human Resources team can claim an application, review it, and approve or reject it as they have time.
- **People User** - Use the People User node to send jobs to a licensed Dispatcher Stratus User. The job may be reassigned, depending on workflow configuration. The People User node is designed for jobs that are intended to be completed by the recipient, typically an individual with specialized skill or authority.
    - For example, final approvals for all purchases over $10,000 must be personally approved by the CFO, so the People User node is configured to send those jobs to that user.

Example

The **Editing Process Sample Workflow** provides an example of how you can arrange People Nodes to create a business workflow.



The Challenge: A newspaper is having trouble keeping track of all the freelance article submissions they get, causing articles to be lost, wasting Editors' time, and even delaying printing. The newspaper is looking for a digital solution to clarify its submission pipeline and streamline the approval process.

The Solution: In this workflow, documents are collected from a Dropbox folder and sent to a queue for editors to process. Editors can approve articles or send them for in-house edits. Approved or edited articles are then sent to the Editor-in-Chief for final approval (or more edits) and then stored in Dropbox until they are used. Editors can also add notes to documents to help with future edits.

How the Workflow Works

What follows is a description of the workflow and how the company's needs translate to components of the workflow in order to provide a jumping-off point for future workflows:

1. **The company uses Dropbox for file storage** - Add a **Dropbox In** and a **Dropbox Connector** for the input and output. Sign in to Dropbox through each node and select the relevant folders for each node.

2. **Documents need to be reviewed** - Add a **People Queue** node for Editors. In the corresponding **User Group**, create a Queue. Then, select the User Group and Queue in the node.

3. **Documents may need edits** - Add another **People Queue** node for the in-house editing team. In the corresponding **User Group**, create a Queue. Then, select the User Group and Queue in the node.

4. **The Editor-in-Chief needs to have final approval** - Add a **People User** node for the Editor-in-Chief. Use the node to search through all licensed users and select the one you would like to send to.

5. **Connecting the nodes** - Now that the individual elements are configured, they need to be connected to create a workflow.

- Connect the Dropbox In node to the Editor's People Queue node.

- Connect the Editor's People Queue node to the In-House Edits People Queue node and the Editor-in-Chief People User node. Note that the connections default to a dotted line, indicating that the user in the People Queue node can select the correct path.

- Connect the In-House Edits People Queue node and the Editor-in-Chief People User node. Note that the connections default to a dotted line, indicating that the user in the People Queue node can select the correct path.

- Connect the Editor-in-Chief People User node to the In-House Edits People Queue node and the Dropbox Connector. Note that the connection to the People Queue node defaults to a dotted line, indicating that the user in the People User node can select the correct path (if the document needs further edits, it can be placed back in the In-House Edits Queue). However, People nodes default to Normal connections with non-People nodes. Select the last connection, press the F4 key, and change the connection to the dotted line (User-Selectable) so the user has the option of selecting that one as well.

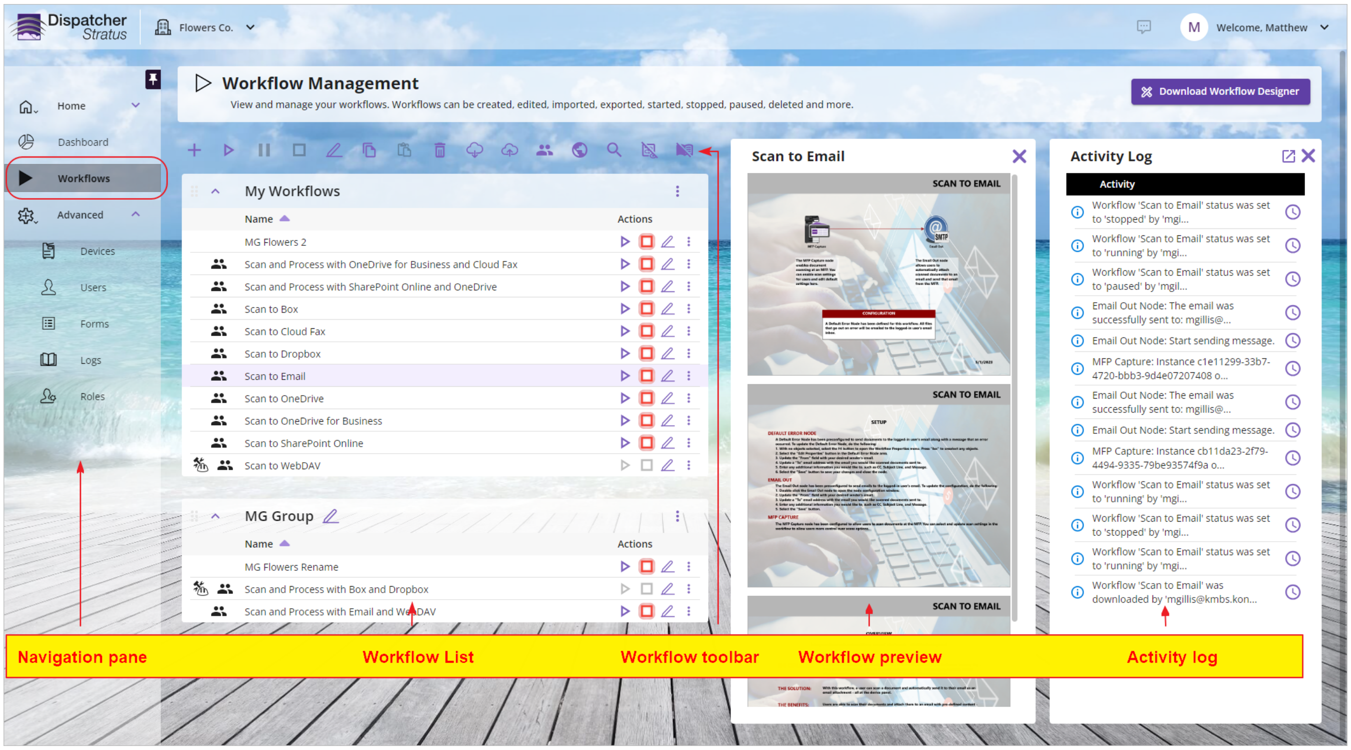
With that, your workflow is complete!

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 Stratus .

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



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:

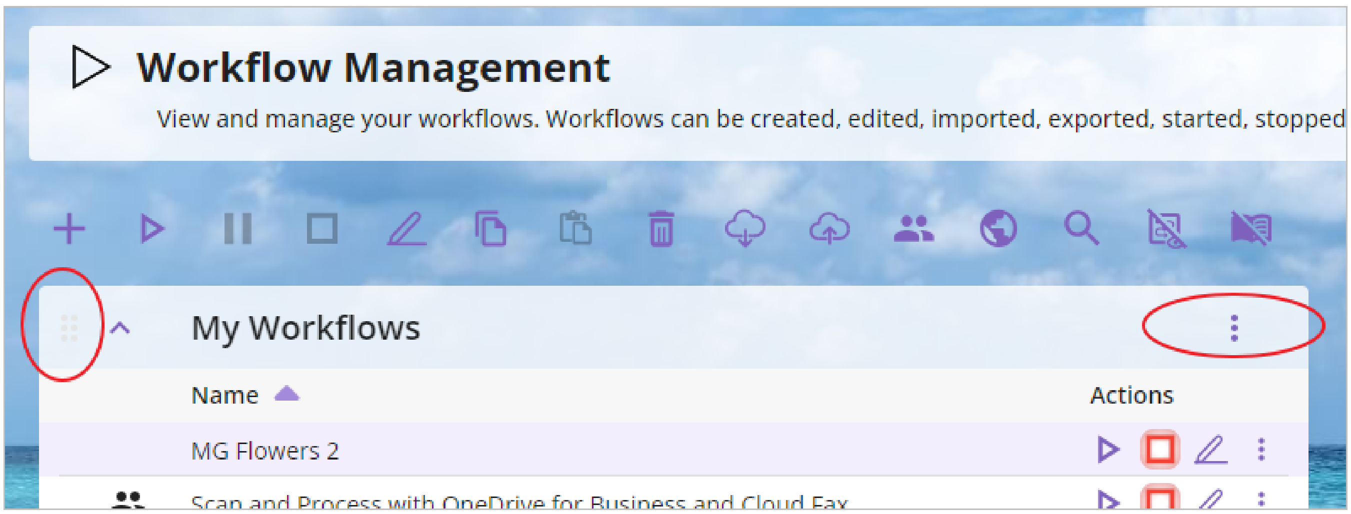
- **Workflow Status** - Draft or valid.
- **Share status** - Displays the share status of the workflow. To run a workflow on a device, it must be shared with the device. Workflows can also be shared with users and user groups.
- **Name** - Workflows can be renamed only in the Workflow Designer.
- **Actions** - 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	The workflow is currently running.
	Paused	Execution of the workflow is currently paused.
	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:



- **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

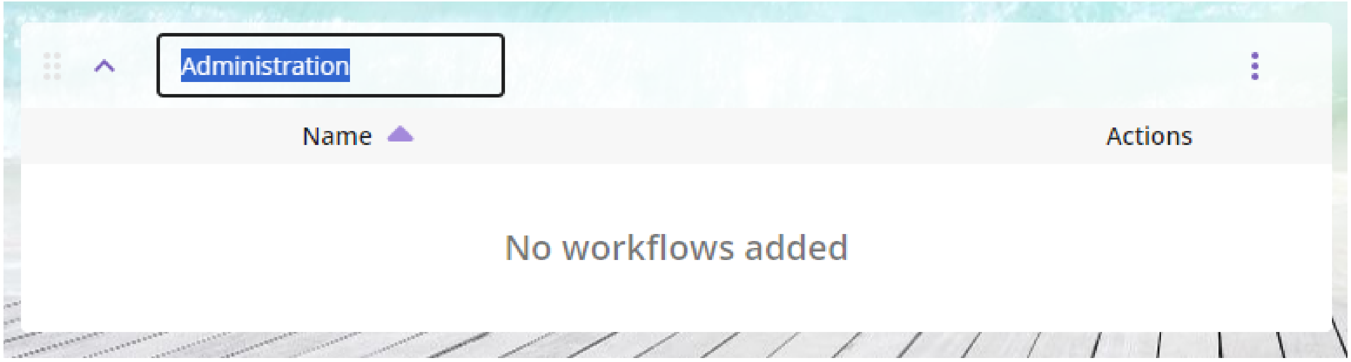
The Workflows toolbar appears above the Workflow List panel, displaying icons you use to manage your workflows. The icons include:

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

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



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:

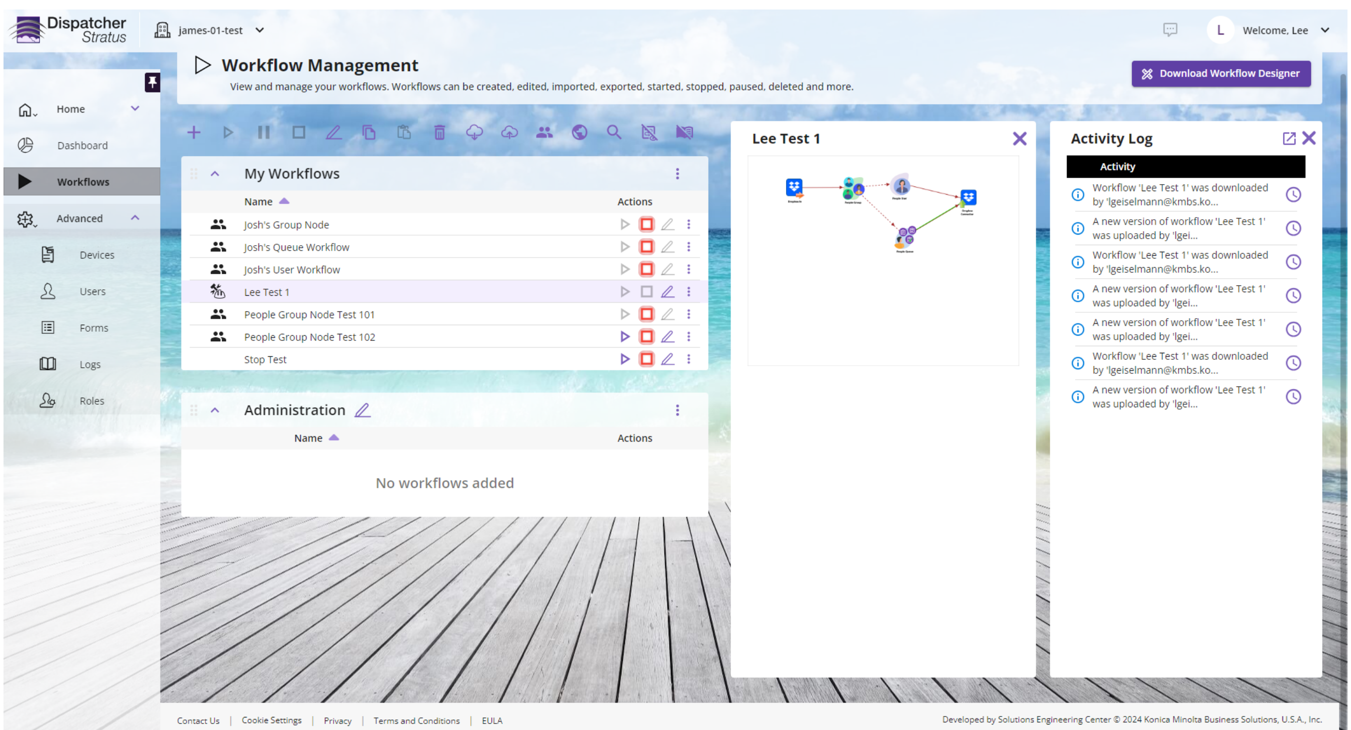
- **Double-click on an exported file**. The Import Wizard will appear. If Dispatcher Stratus is not running, the application will automatically launch.

- 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 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.

Note: If you run a workflow that generates a **Job**, then Stop the workflow, that job will still be available. However, since the workflow is no longer running, no new jobs will be accepted until the workflow is started again.

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

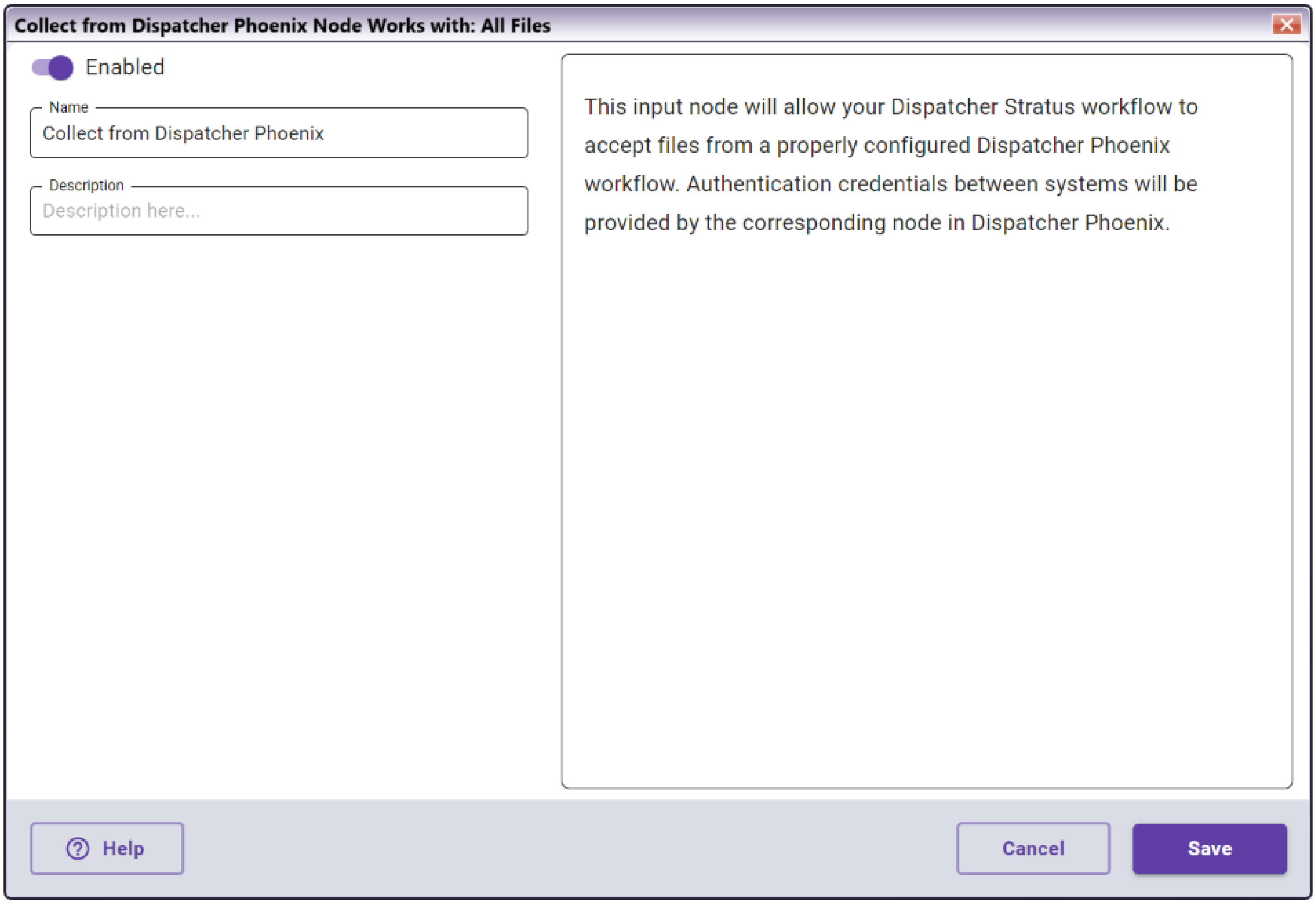
Overview of Collection Nodes

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

- **Collect from Dispatcher Phoenix** - Collects data and documents from a connected Dispatcher Phoenix installation. This node requires an available non-MFP license.
- **Dropbox In** - Collects data and documents from a Dropbox folder. This node requires an available non-MFP license.
- **External Form** - Collects data and documents from a form that can be accessed outside of Dispatcher Stratus. This node requires an available non-MFP license.
- **Internal Form** - Collects data and documents from a form that can be accessed within Dispatcher Stratus. This node requires an available non-MFP license.
- **MFP Capture** - Collects data and documents from a licensed MFP.
- **Upland InterFAX In** - Collects faxes from a connected Upland InterFAX account. This node requires an available non-MFP license.

Collect from Dispatcher Phoenix

Use this node to collect documents from any connected Dispatcher Phoenix installation and import them into Dispatcher Stratus . In this way, you can combine the powerful document processing tools of Dispatcher Phoenix with the People-based workflow capabilities of Dispatcher Stratus .



Node Licensing

This node consumes a non-MFP device license when used in a workflow. When you save the workflow, if sufficient licenses are not available in the tenant to register the Collect from Dispatcher Phoenix node(s), the workflow will remain in Draft status until the nodes are registered.

Configuring the Collect from Phoenix Node

To open the **Collect from Dispatcher Phoenix** node's configuration window (shown above), add the 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 this node, and no other collection nodes are enabled, the workflow will not accept documents and will fail validation.
- **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.

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 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.

Configuration Options

This node does not contain any configuration options. All configuration occurs in the corresponding **Dispatcher Stratus Connector** node, which is described in the Dispatcher Phoenix Online Help.

Metadata

The Collect from Dispatcher Phoenix node can import metadata from Dispatcher Phoenix workflows into Dispatcher Stratus . 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** or **Metadata to File** node. For example, when added to a Phoenix workflow, the Metadata to File node will list all metadata groups in the workflow (such as the OCR metadata group) except Dispatcher Stratus' Send to Dispatcher Phoenix and Collect from Dispatcher Phoenix nodes. However, in either situation, you can manually select the metadata groups.
- Metadata keys generated in Dispatcher Phoenix and collected by Dispatcher Stratus must be manually edited in Dispatcher Stratus for use in workflows. Conversely, metadata keys flowing from Dispatcher Stratus do not need to be modified in Dispatcher Phoenix.

  For any metadata keys collected from Dispatcher Phoenix, make the following adjustments before using them in a Dispatcher Stratus workflow:

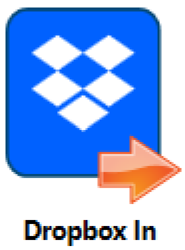
  - Prefix the metadata keys with "file:".
  - Replace any colons in the metadata key with a period.

  For example, assume the Phoenix workflow includes the Input Folder node. The Phoenix workflow generates a metadata key {input:total} that represents the total number of collected files. In order to access that data in the Dispatcher Stratus workflow, you must modify the metadata key to {file:input.total}.

  For page-level metadata, such as that generated by Forms Processing or Advanced OCR, you must encase parts of the metadata key in square brackets and quotes. For example, if the Phoenix workflow includes an Advanced OCR node that includes a zone called ProjectName, then the Phoenix workflow will add a metadata key {ocr:zone.ProjectName}. Accessing it by page number in Phoenix involves adding the page number minus 1 to the key, {ocr:zone.ProjectName[0]} for page 1. To access the metadata in Dispatcher Stratus , you must modify the metadata key as such: {file:ocr[“zone.ProjectName”][0].value}.

For metadata keys generated by Phoenix that contain periods, colons, and/or underscores in its second half, you must encase the second part of the key in square brackets and quotes. For example, for an index form set up in Phoenix with a field that has a variable name “document_name”, Phoenix will generate a metadata key {form:document_name}. Modify the corresponding metadata key in Dispatcher Stratus to: {file:form[“document_name”]}.

Dropbox In



Use the **Dropbox In** collection node to connect to a Dropbox account, including a Dropbox Business Standard or Advanced account, to monitor the configured folder for new files at regular intervals. Dropbox is a file hosting service that offers Cloud storage and file synchronization.

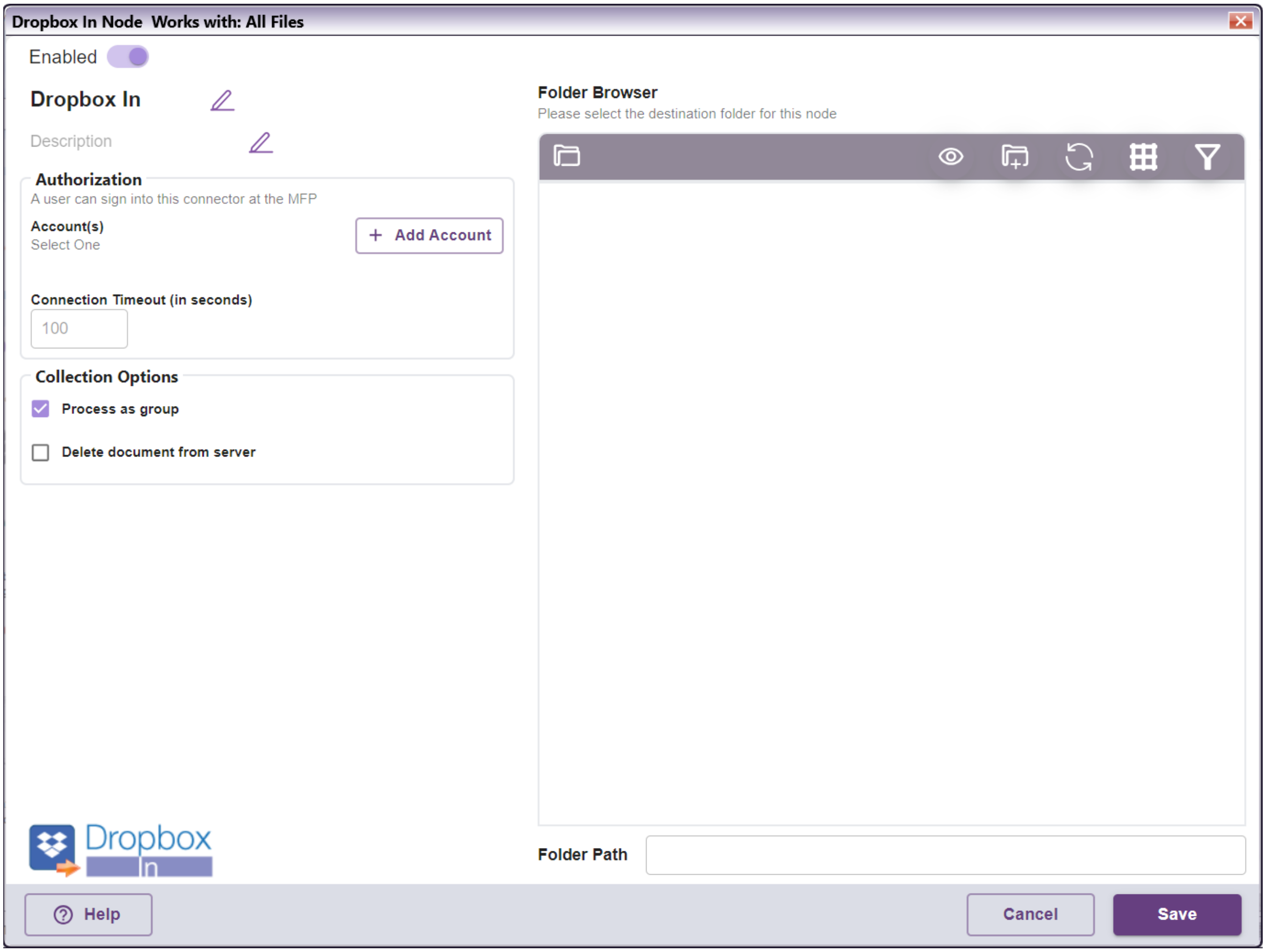
Dropbox In supports Personal, Team, and Shared folders, and can filter files by name, size, or modified date prior to passing documents along a workflow for processing and routing.

Important! You must have an available **device license** to save your Dropbox In node configuration.

To open the Dropbox In node’s configuration window, add a Collection node for Dropbox to your workflow and double-click on it.

Configuring the Dropbox In Node

The Dropbox In node appears in the following illustration:



- **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. While the workflow will still validate, documents will not be output from this node and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other.

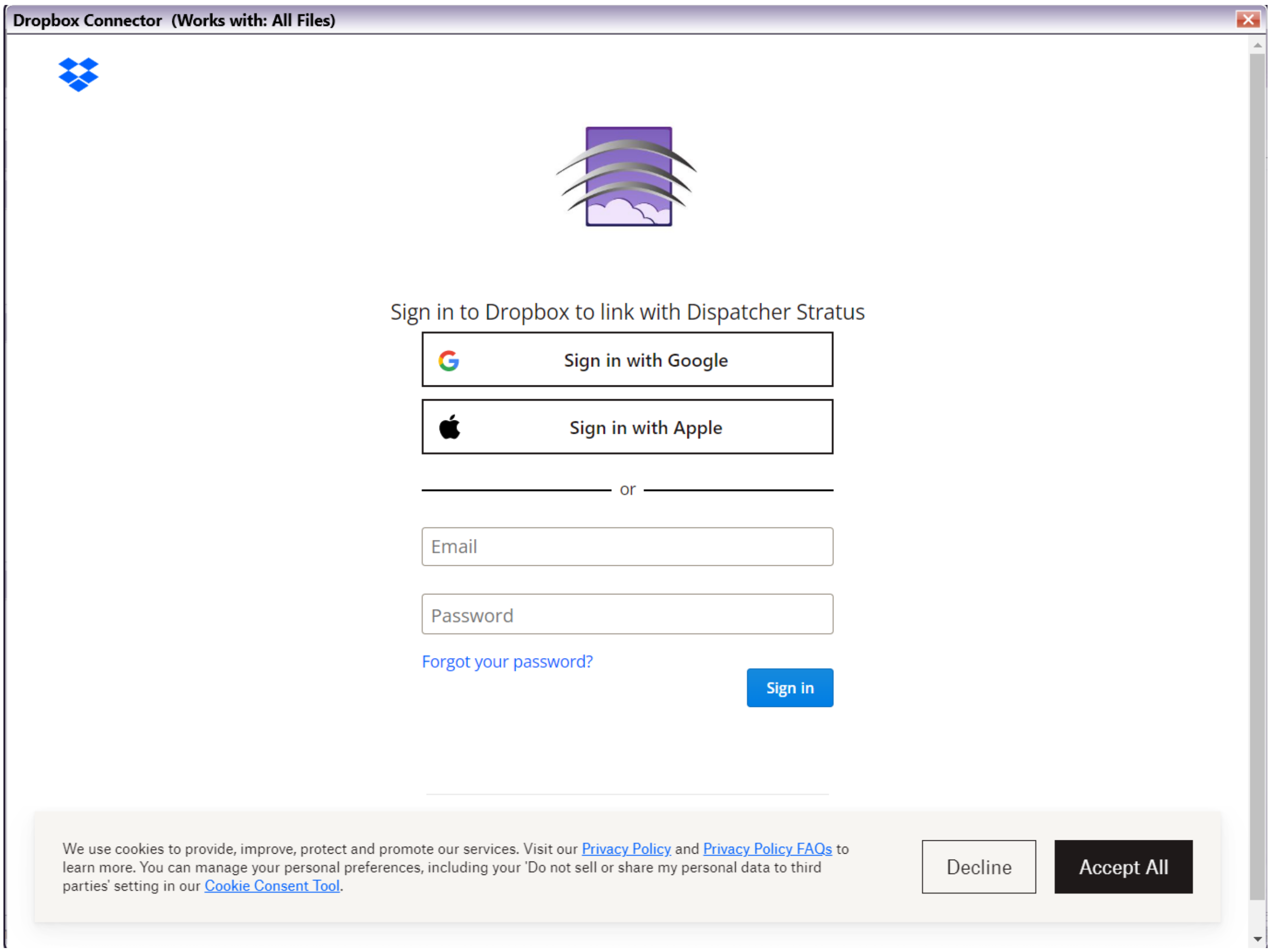
Buttons

- **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.

Connecting to Dropbox

To connect to Dropbox, do the following:

1. Click the **Add Account** button. This will open the Dropbox login.



2. Enter the login information for the Dropbox account. Note that the Dropbox In node also supports Google and Apple logins. Then, click **Log In**.

This will bring you back to the Dropbox In node to complete configuration. If there is more than one account available, you can select the account you want by clicking the radio button next to the desired account.

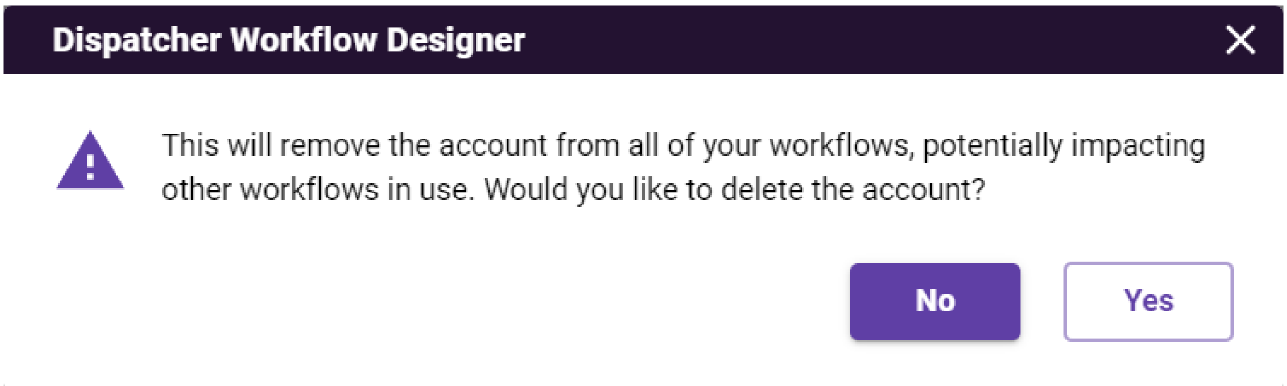
To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

Deleting an Account

To delete an account, click the **Delete** icon next to the account you would like to delete. This will open a window with the following options:

- **No** - This cancels the delete action and returns you to the node configuration window.
- **Yes** This deletes the account in this node. The account can be added again later.
- **Yes, Permanently** - This deletes the account from the tenant, including all workflows. The account can be added again later.To continue with this action, select **Yes**.

  Caution! Selecting this option can impact workflow performance.



Collection Option

In the **Collection option** section, you have the following options:

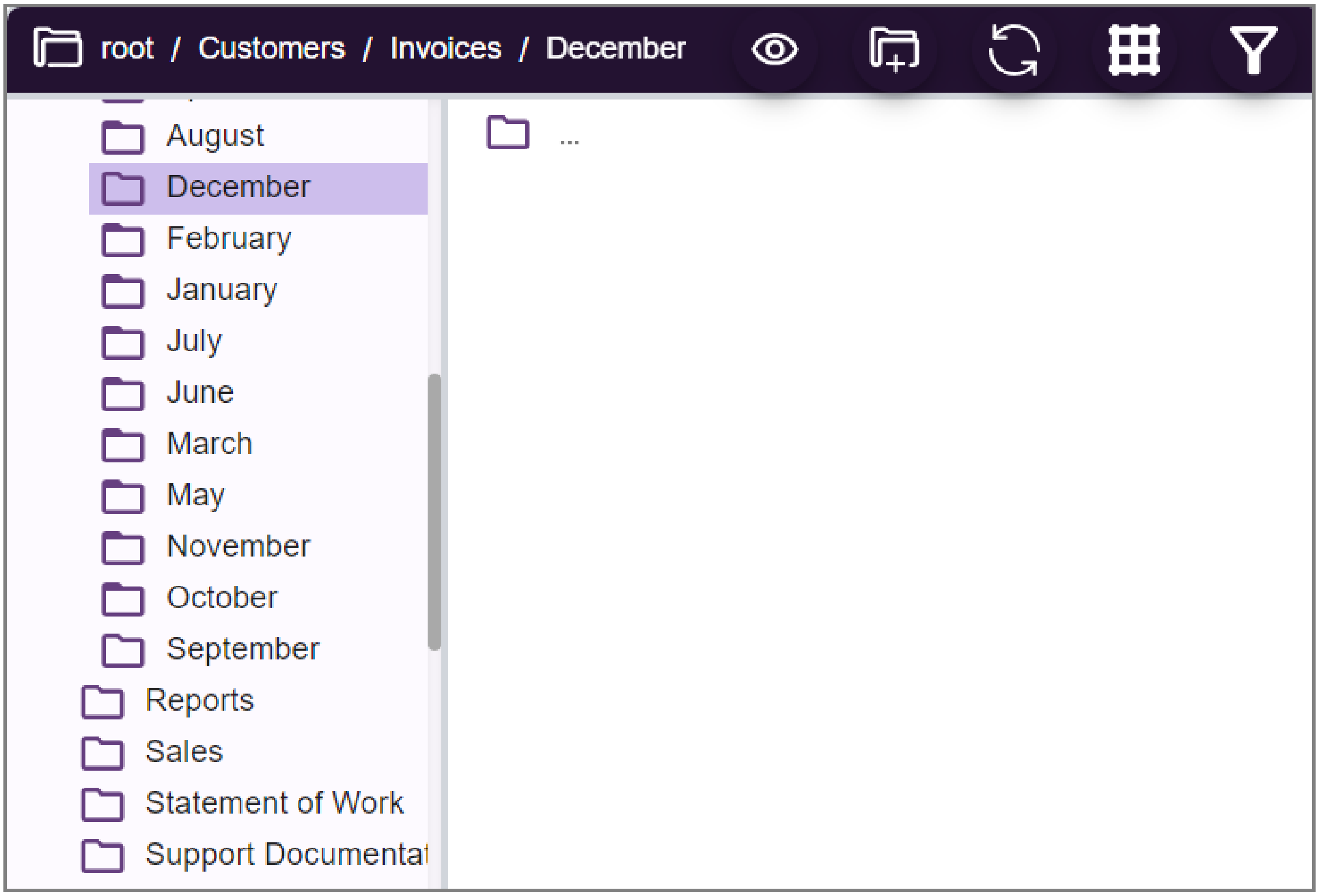
- **Process as group** - To process files from the selected folder as a group, check this box. To process files individually, leave the box blank.
- **Delete document from server** - To delete files from the Dropbox server on collection, check this box. Otherwise, leave the box blank.

Dropbox Explorer Area

Once the connection with Dropbox has been established, the Dropbox Explorer area populates with the folder structure of the selected Dropbox account. Select the Dropbox folder you want to monitor.

The current folder path displays in the top bar of the Dropbox area. You can use this folder path to navigate back through your folder structure. The **Folder Path** field below the explorer area also displays the current path.

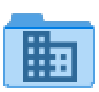
In the following illustration, the folder path displays and the Dropbox area shows the Tree view :

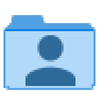


Folder Types

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

Filter

Use the **Filter** drop-down in the upper-right corner of the Properties window to specify the conditions, if any, for collecting files. For any filters you apply, the workflow collects only files from Dropbox that meet the specified criteria.

- **Filter by File Name** - To filter files based on a specified file name, check the box. The following fields activate:
  - **File name** - Enter the complete file name, including the file extension, that you want to collect from Dropbox. You can use wildcards in the name you enter. For example entering ***.jpg** will return all files with an extension of “jpg”.
    - **Regular expression** - To dynamically filter files using a pattern describing a certain amount of text, check this box. Note that if you select this option, the **Match case** checkbox inactivates.
    - **Match case** - If your search is case-sensitive, check this box. Note that if you select this option, the **Regular Expression** checkbox inactivates.
- **Filter by File Size** - To filter files based on file size, check this box. If you check the box at this field, the following options activate:
  - **File size** - Filter files relative to the size specified below. Select one of the following conditions:
    - Greater than
    - Less than
    - Greater than or equal
    - Less than or equal
    - in between (specify the low and high values in the range)

    Specify a file size, and then specify the file size measurement unit. You have the following options:
    - Bytes
    - KB
    - MB
    - GB
    - TB
- **Filter by Modified Date** - To filter files based on the modified date, check the box at this field. The following fields activate:
  - **File Date** - Filter files relative to the date specified below. Select one of the following conditions:
    - Newer Than

        - Older Than
        - In Between (specify the low and high dates in the range)
        - Equal
        - **Select a date** - To specify a date, click the Calendar and select a date. You can also enter a date directly using one of the following formats:
            - MM/DD/YY
            - MM/DD/YYYY
            - MONTH DD, YYYY
- **Filter criteria**
    - **Match any one filter criteria** - If any one of the filter criteria is met, the file will be collected from Dropbox.
    - **Match all filter criteria** - If all of the filter criteria are met, the file will be collected from Dropbox. If any one of the filter criteria is not met, the file will not be collected from Dropbox.

Options

There are several options that allow you to customize your view of files and folders within the Dropbox In node:

- **Show files** - To show files within the folder browsing view, select this option.
- **New folder** - To create a new folder in the currently selected folder path on Dropbox, select this option. The Create New Folder window appears.
- **Refresh** - To refresh the folder browser view (Show tree view or Show files) in Dropbox Explorer, select this option.
- **Change View** - To toggle between a tree view and a folder view, select this option.

Folder Path

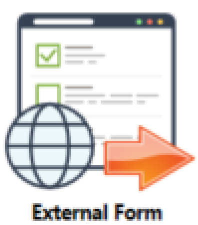
The **Folder path** field below the folder tree auto-populates when you make your folder selection in the Dropbox Explorer. If you do not want to navigate the file explorer, you can manually enter the folder path in this field.

Metadata

The following metadata is created in the Dropbox In node:

Metadata Value	Description
{dropboxin:count}	The number of collected files per folder.
{dropboxin:date}	The last modified date of the file collected from Dropbox.
{dropboxin:ext}	The collected file extension.
{dropboxin:filesize}	The size of the file collected.
{dropboxin:folder}	The name of the folder the file was collected from.
{dropboxin:fullname}	The collected file name with extension
{dropboxin:fullpath}	The full file path including file name.
{dropboxin:id}	The internal file id of the collected file.
{dropboxin:name}	The collected file name without extension.

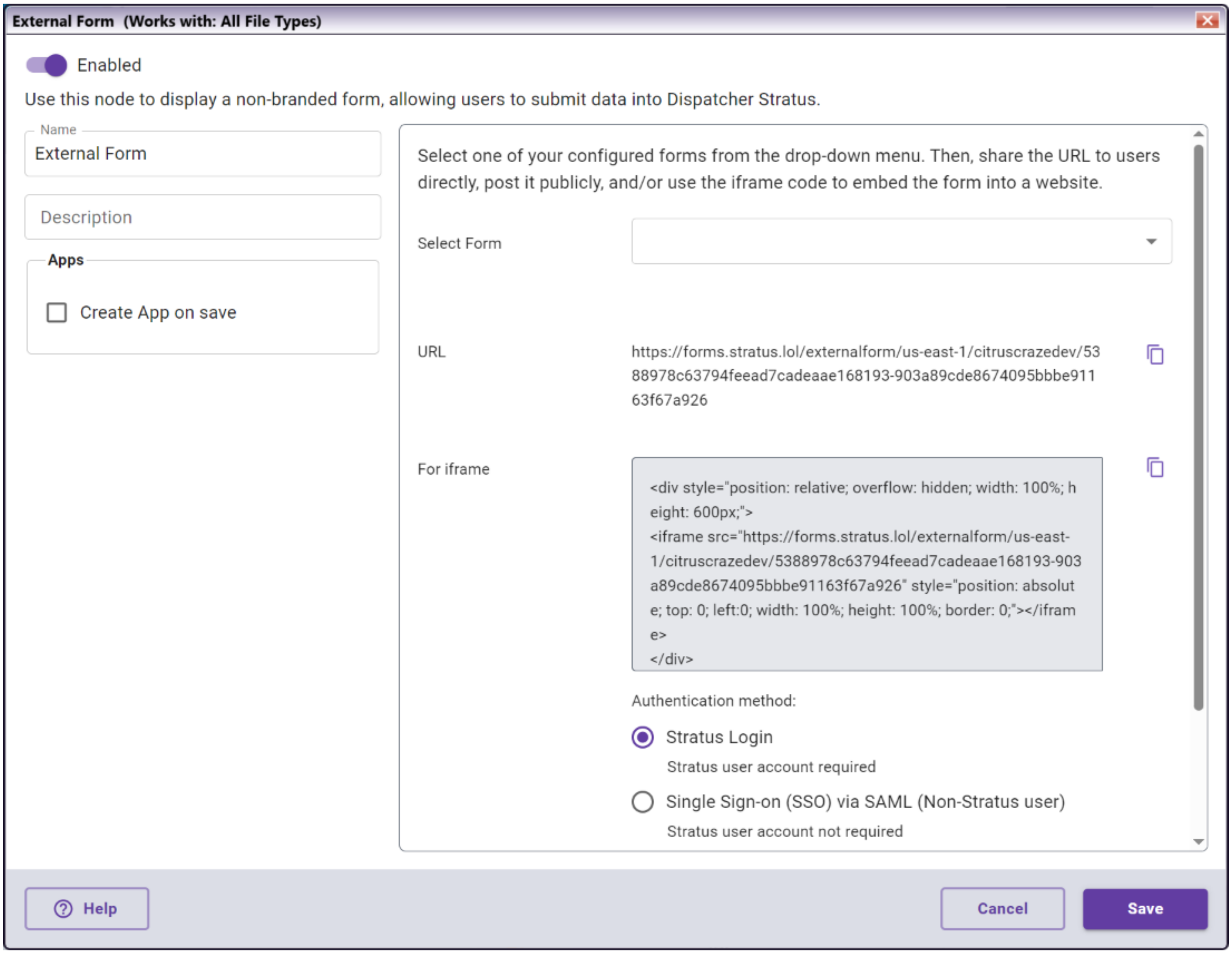
External Form



The External Form node allows for Dispatcher Stratus forms to be connected to a URL. This URL can be provided to a user where Dispatcher Stratus collects the data entered into the form. The External Form node acts as the beginning of a workflow that does not necessarily begin with a document, but does require some input from a user. You can use this node for a variety of workflows, such as:

- Job application collection
- Incoming sales information collection
- Customer feedback

To open the **External Form** node's configuration window, add the node to your workflow and double-click on it.



Configuring the External Form Node

- **Enabled** - To enable this node in the current workflow, ensure the 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.
- **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.
- **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.

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.

Apps

To create a **Stratus app** based on the configured node, select **Create App on save**. Upon saving the node, Stratus creates an External app and posts it on the Apps page. The app will enable tenant members to access the form specified in this node without accessing the workflow itself, for example, for users who do not have workflow permissions.

The new app retains the node’s configuration, including the name, description, and node icon. If a node icon has not been defined for the workflow, Stratus assigns a generic default icon to the app instead.

Note: The new app appears on the Apps page in an unshared state so that it can be modified, if necessary, before being shared with other tenant members.

Configuration Options

To configure the node, do the following:

1. Using the **Select Form** drop-down menu, select one of your configured **forms**.
2. The URL generated is now connected to that form.
3. Copy the URL so it can be distributed and/or copy the iframe code so it can be embedded in a web page. See the **Important** note below for more information.
4. Select the authentication method you would like to associate with the form. Options include:

- Dispatcher Stratus Login - The user must sign in using their Dispatcher Stratus login. This option is selected by default.
- Single Sign-On (SSO) via SAML (Non-Stratus user) - Dispatcher Stratus uses the **previously configured SAML** to authenticate the user without them having to enter credentials.
- Single Sign-On (SSO) via SAML (Stratus user) - Dispatcher Stratus uses the **previously configured SAML** to authenticate the user without them having to enter credentials.
- Anonymous Submission - The user is not required to authenticate.
    - Require human verification - The user is required to complete an ALTCHA (CAPTCHA alternative) to verify they are a human (not a bot) before the form can be submitted. This option is automatically selected when you select Anonymous Submission.

5. Select the **Save** button to save and close the node.

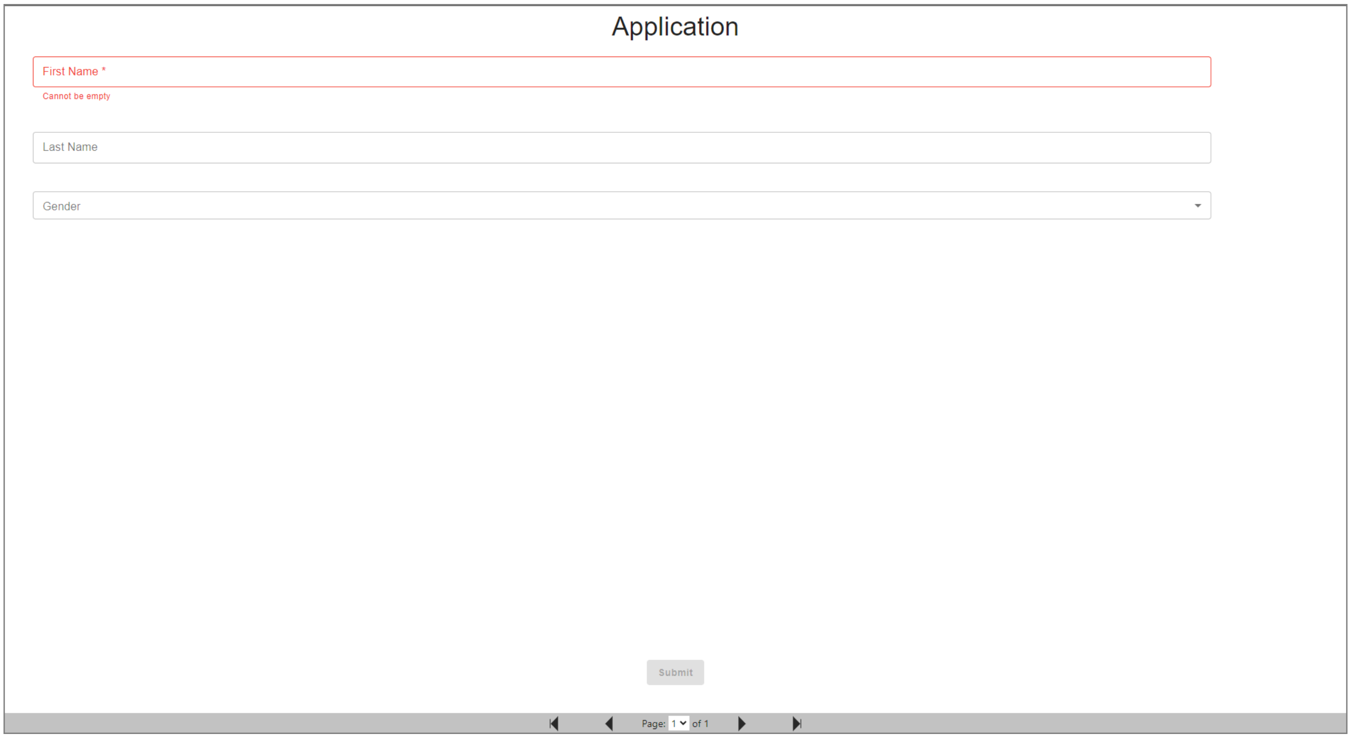
Important!

- The External Form node cannot collect data if the workflow is not running. If a user attempts to access the provided URL while the workflow is not running, they will receive an error.

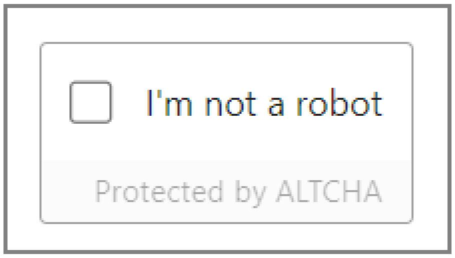
- The URL is not accessible from outside the node. It is recommended that you save the URL somewhere external. If the URL gets lost, you will have to stop the workflow to recopy it, which could impact data collection.
- Each node generates a unique URL. You can have multiple External Form nodes in the same workflow.
- The form can also be embedded in an iframe within another website.
- When the External Form node is configured with Anonymous Submission and is followed by a process automation node (not a People node) or a Distribution node, you must insert an **Assign Owner** node before the process automation or Distribution node for the workflow to function as intended.

Using a Form

After the rest of the workflow is configured and is running, the URL provided will take a user to a page to fill out the form, as in the following illustration:



If the Dispatcher Stratus login authentication method was selected during node configuration, users will have to log in with the same authentication method used to access Dispatcher Stratus. If the Anonymous Submission option was selected, users will be brought right to the form without having to login. If you selected to include human verification, it appears at the bottom of the form and must be selected before the form can be submitted.



Note: When using the Dispatcher Stratus login authentication method, the workflow must also be shared with the user attempting to access the form.

External Form Capture

When using the External Form node, forms are accessed via the provided URL or accessing the page with the embedded iframe. To complete a form, do the following:

1. Navigate to the page with the External Form.
2. Enter information into the required fields and any additional fields as needed.
3. If needed, select the **I'm not a robot** checkbox.
4. Select the **Submit** button

From there, the form is sent into the workflow as a job. If there are any **People Nodes** in the workflow, the form can be viewed on the Forms tab in the **Job**. Users with access to the job can update Form field entries (with the exception of **Signature fields**).

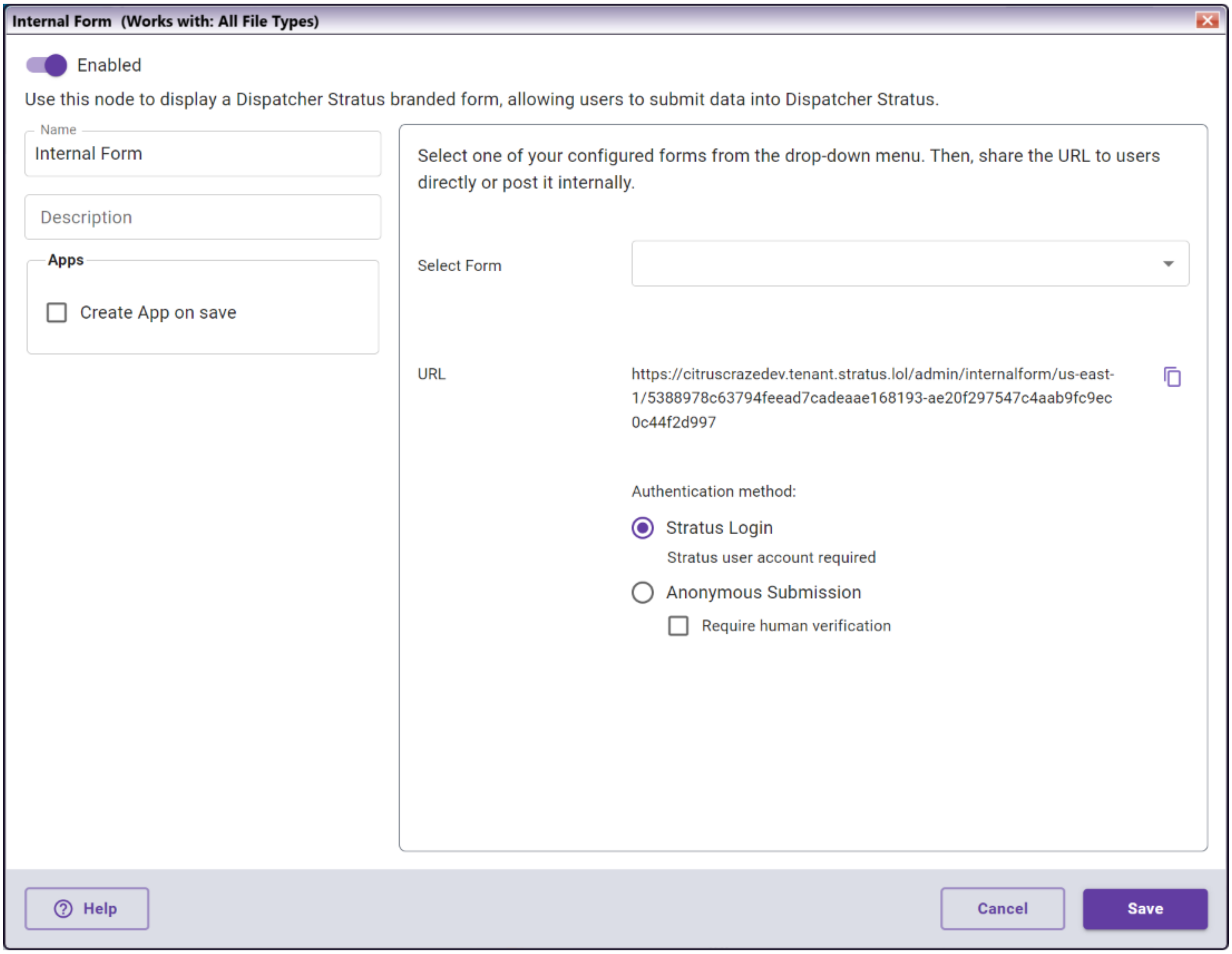
Eventually, as the job is processed through the workflow, the job will reach a Distribution Node. This indicates the end of the workflow. The job will no longer be accessible and the form data will be deleted, unless it was saved, such as with the **Flatten Form** or **Metadata to File** nodes.

Internal Form

The Internal Form node allows for Dispatcher Stratus forms to be connected to a URL. This URL can be provided to a user, where Dispatcher Stratus collects the data entered into the form. The Internal Form node acts as the beginning of a workflow that does not necessarily begin with a document, but does require some input from an internal user. You can use this node for a variety of workflows, such as:

- Maintenance requests
- Internal job applications
- Organization food orders
- Company votes

To open the **Internal Form** node’s configuration window, add the node to your workflow and double-click on it.



Configuring the Internal Form Node

- **Enabled** - To enable this node in the current workflow, ensure the 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.
- **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.

- **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.

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.

Apps

To create a **Stratus app** based on the configured node, select **Create App on save**. Upon saving the node, Stratus creates an Internal app and posts it on the Apps page. The app will enable tenant members to access the form specified in this node without accessing the workflow itself, for example, for users who do not have workflow permissions.

The new app retains the node's configuration, including the name, description, and node icon. If a node icon has not been defined for the workflow, Stratus assigns a generic default icon to the app instead.

Note: The new app appears on the Apps page in an unshared state so that it can be modified, if necessary, before being shared with other tenant members.

Configuration Options

To configure the node, do the following:

1. Using the **Select Form** drop-down menu, select a prebuilt **form**.
2. The URL generated is now connected to that form.
3. Copy the URL so it can be provided to internal users. See the **Important** note below for more information.
4. Select the authentication method you would like to associate with the form. By default, users must use their Dispatcher Stratus login. If you would like to allow access to the form without a Dispatcher Stratus login, select the **Anonymous Submission** option. If you select Anonymous Submission, the **Require human verification** option is also selected by default. This option adds an ALTCHA to the form that must be completed before the form can be submitted.
5. Select the **Save** button to save and close the node.

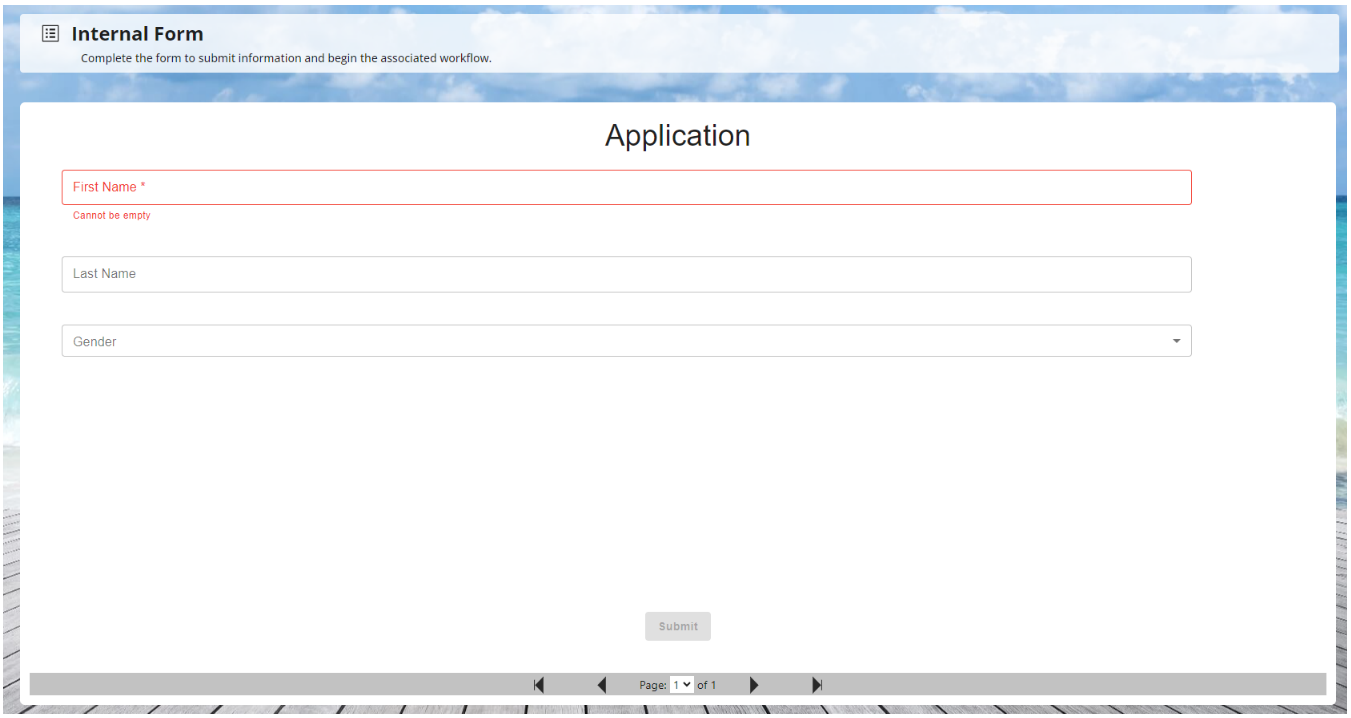
Important!

- The Internal Form node cannot collect data if the workflow is not running. If a user attempts to access the provided URL while the workflow is not running, they will receive an error.

- The URL is not accessible from outside the node. It is recommended that you save the URL somewhere external. If the URL gets lost, you will have to stop the workflow to recopy it, which could impact data collection.
- Each node generates a unique URL. You can have multiple Internal Form nodes in the same workflow.
- When the Internal Form node is configured with Anonymous Submission and is followed by a process automation node (not a People node) or a Distribution node, you must insert an **Assign Owner** node before the process automation or Distribution node for the workflow to function as intended.

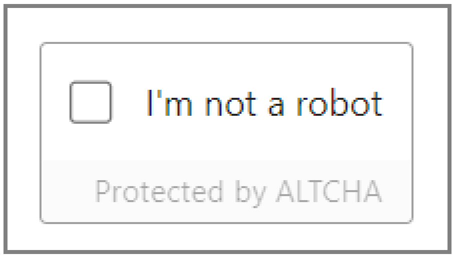
Using a Form

After the rest of the workflow is configured and is running, the URL provided will take a user to a page to fill out the form, as in the following illustration:



If the Dispatcher Stratus login authentication method was selected during node configuration, users will have to log in with the same authentication method used to access Dispatcher Stratus. If the Anonymous Submission option was selected, users will be brought right to the form without having to login. If you selected to include human verification, it appears at the bottom of the form and must be selected before the form can be submitted.

Note: When using the Dispatcher Stratus login authentication method, the workflow must also be shared with the user attempting to access the form.



Internal Form Capture

When using the Internal Form node, forms are accessed via the provided URL. To complete a form, do the following:

1. Navigate to the page with the Internal Form.
2. Enter information into the required fields and any additional fields as needed.
3. If needed, select the **I'm not a robot** checkbox.
4. Select the **Submit** button

From there, the form is sent into the workflow as a job. If there are any **People Nodes** in the workflow, the form can be viewed on the Job tab and the Forms tab in the **Job**. Users with access to the job can update Form field entries (with the exception of **Signature fields**).

Eventually, as the job is processed through the workflow, the job will reach a Distribution Node. This indicates the end of the workflow. The job will no longer be accessible and the form data will be deleted, unless it was saved, such as with the **Flatten Form** or **Metadata to File** nodes.

DSP Web In

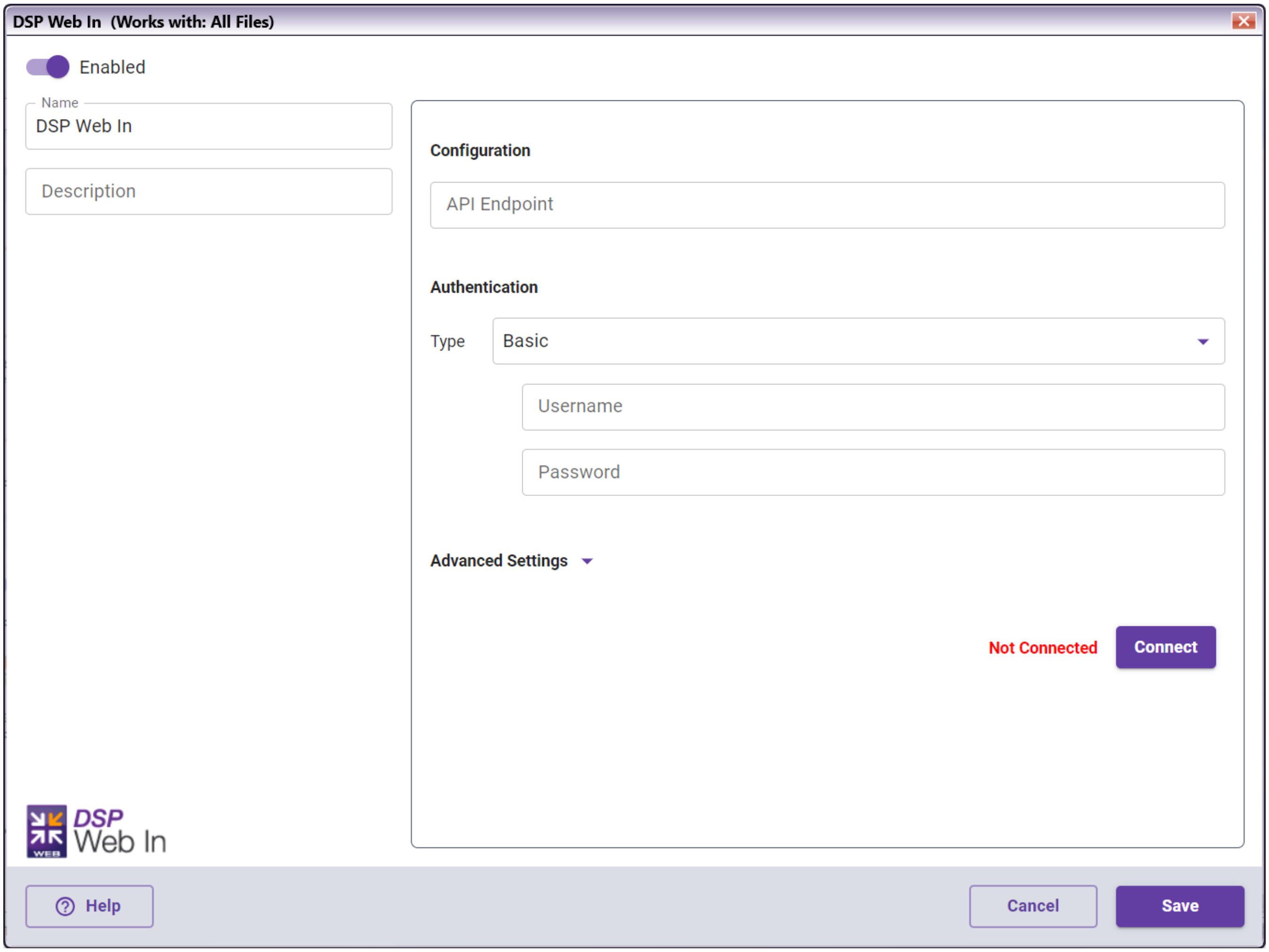
The **DSP Web In** node is designed for use with applications/features that have been developed by members of the Dispatcher Stratus Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Important! You must have an available **device license** to save your DSP Web In node configuration.

To open the DSP Web In node's configuration window, add a DSP Web In Collection node to your workflow and double-click on it.

Configuring the DSP Web In Node

The DSP Web In node appears in the following illustration:



- **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. While the workflow will still validate, documents will not be output from this node and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other. If the description is long, you can hover the mouse over the field to read its entire contents.

Buttons

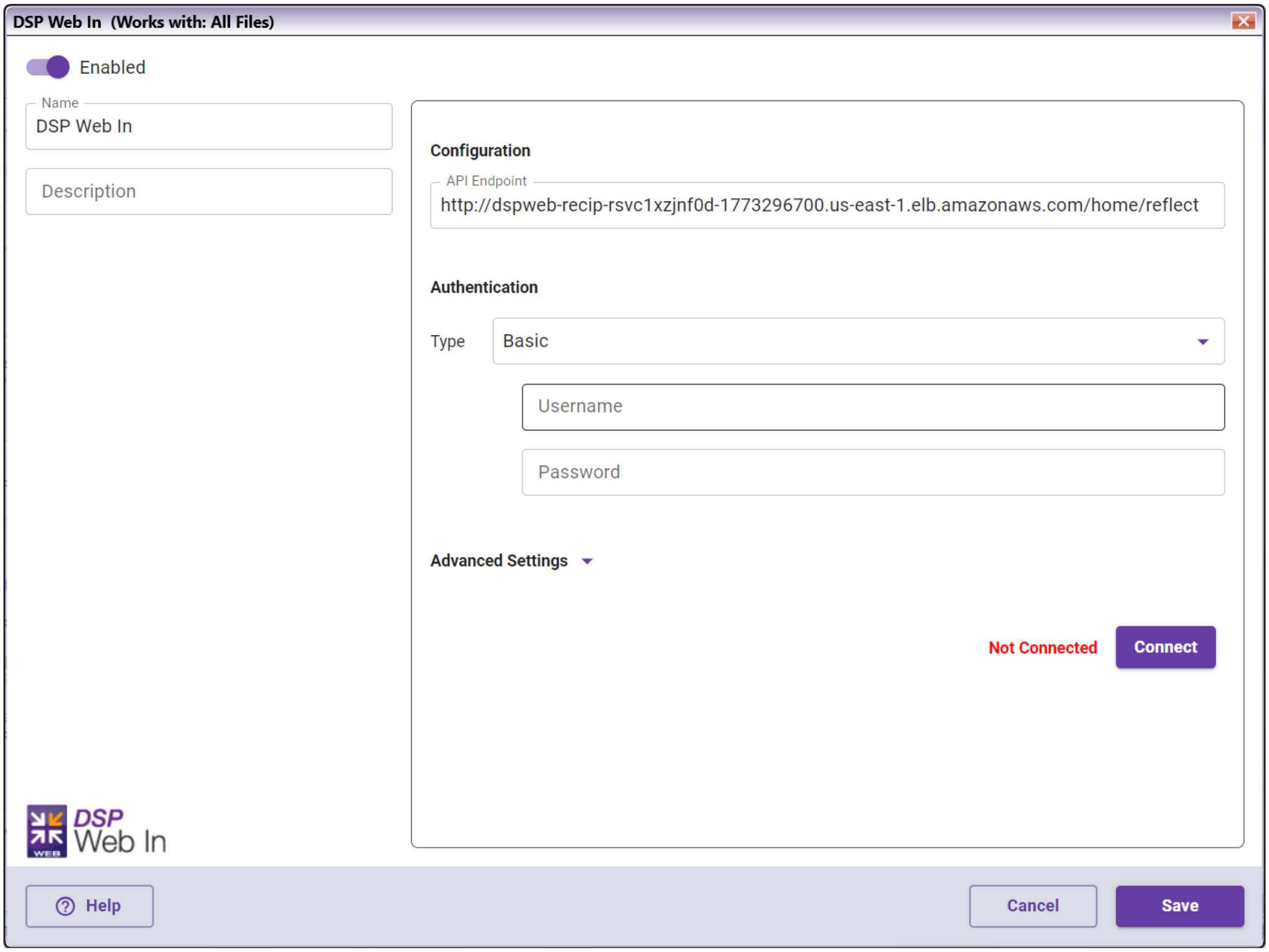
- **Help** - To access Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.

Application Setup

To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API’s location (e.g., a URL). To configure the node, do the following:

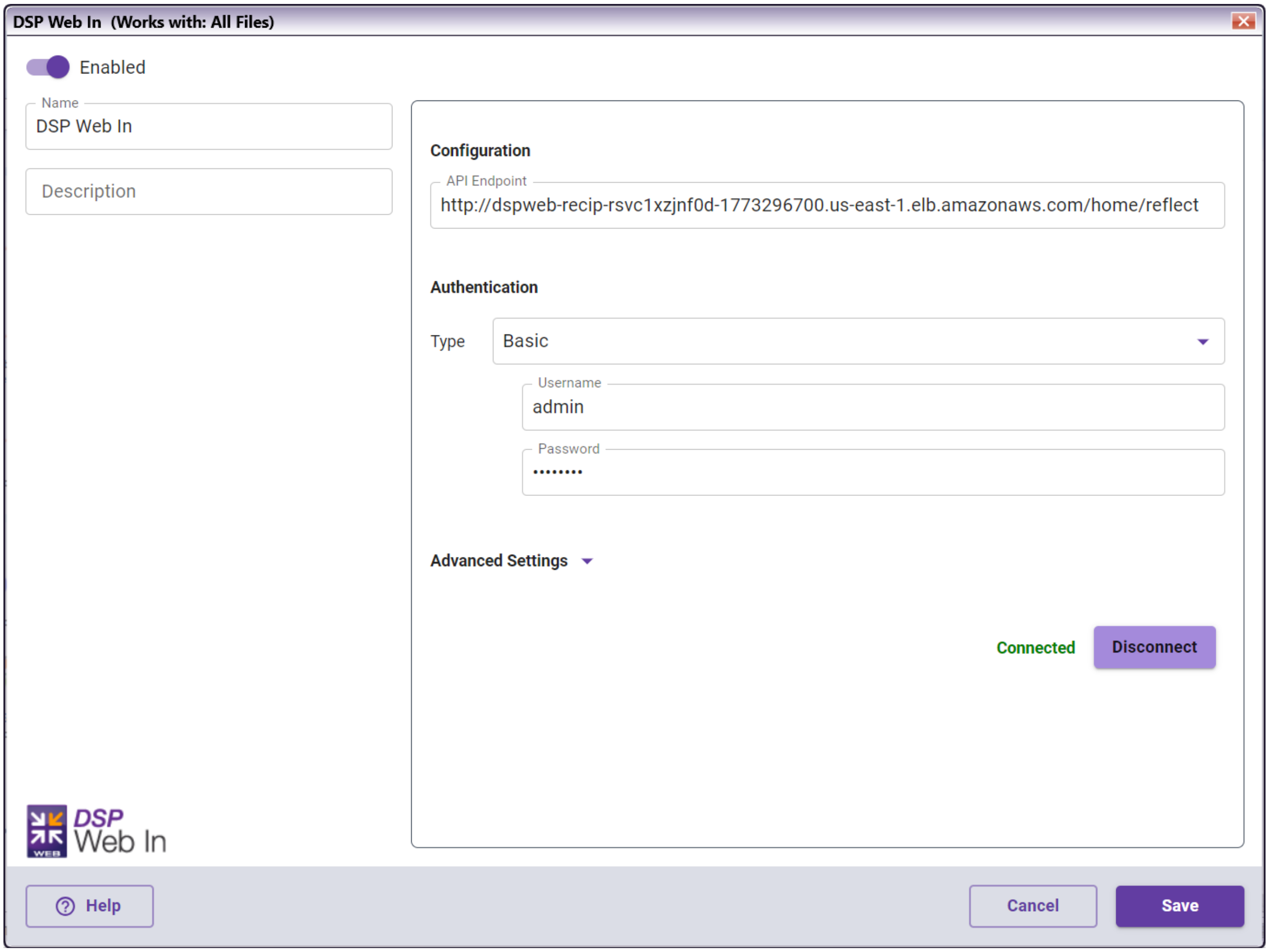
1. Double-click the DSP Web In node to open it.

2. Enter the API Endpoint to the application.



3. Select your **Authentication** type. Options include:
   - Basic - This will prompt you to enter your **Username** and **Password**.
   - APIKey - This will prompt you to enter your **Key Name** and **Key Value**.
   - Bearer Token - This will prompt you to enter your **Token**.

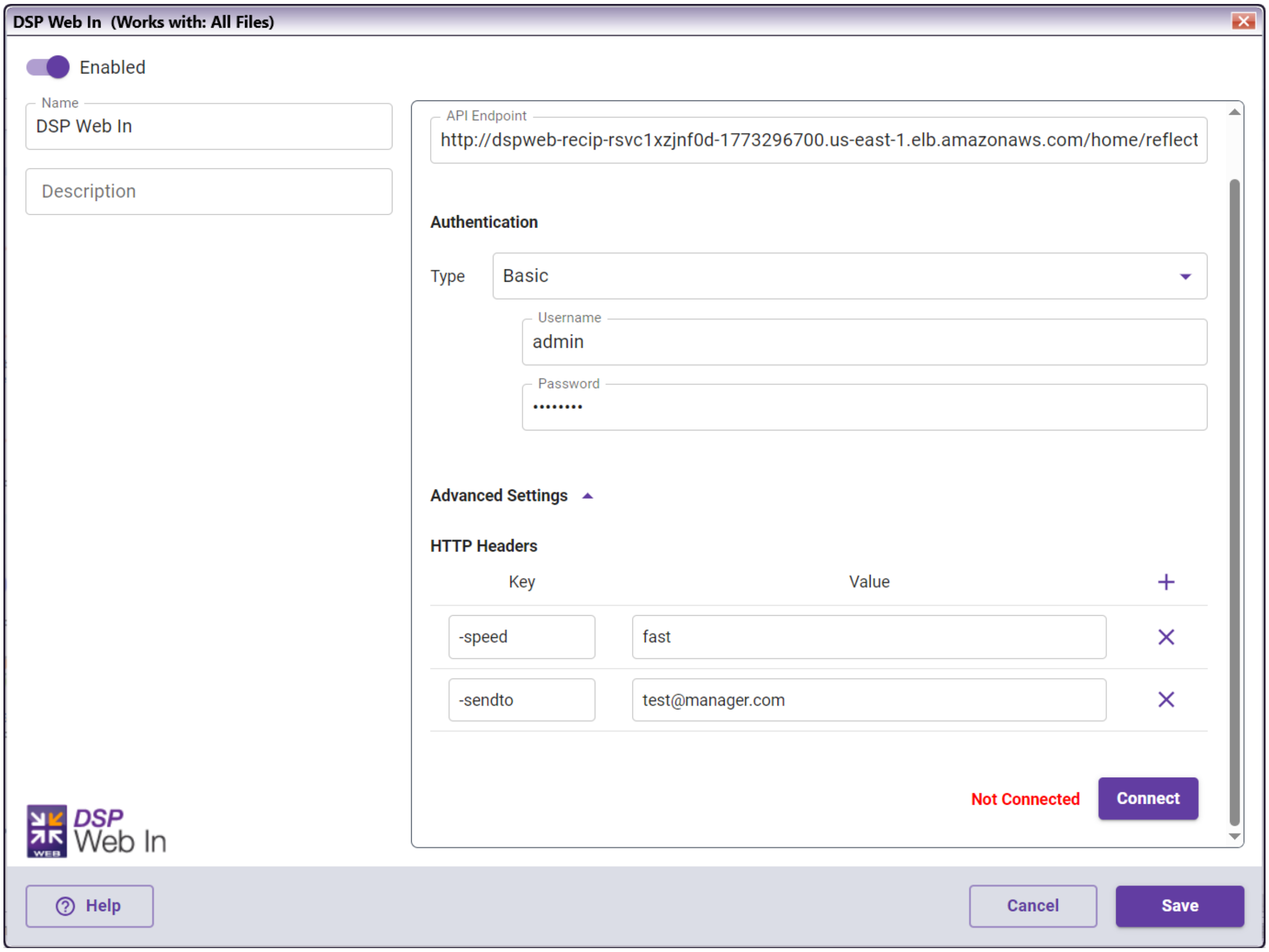
4. Select the **Connect** button. This will establish a connection between the DSP Web In node and the application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.



Important! If you have not successfully connected, the workflow cannot be properly validated.

Note: Any changes made to the API field will require you to select the **Connect** button to reestablish the connection.

5. If needed, select the **Advanced Settings** drop-down to reveal additional configuration options. You can add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header. Headers are also metadata compatible.



6. Save and close the node.

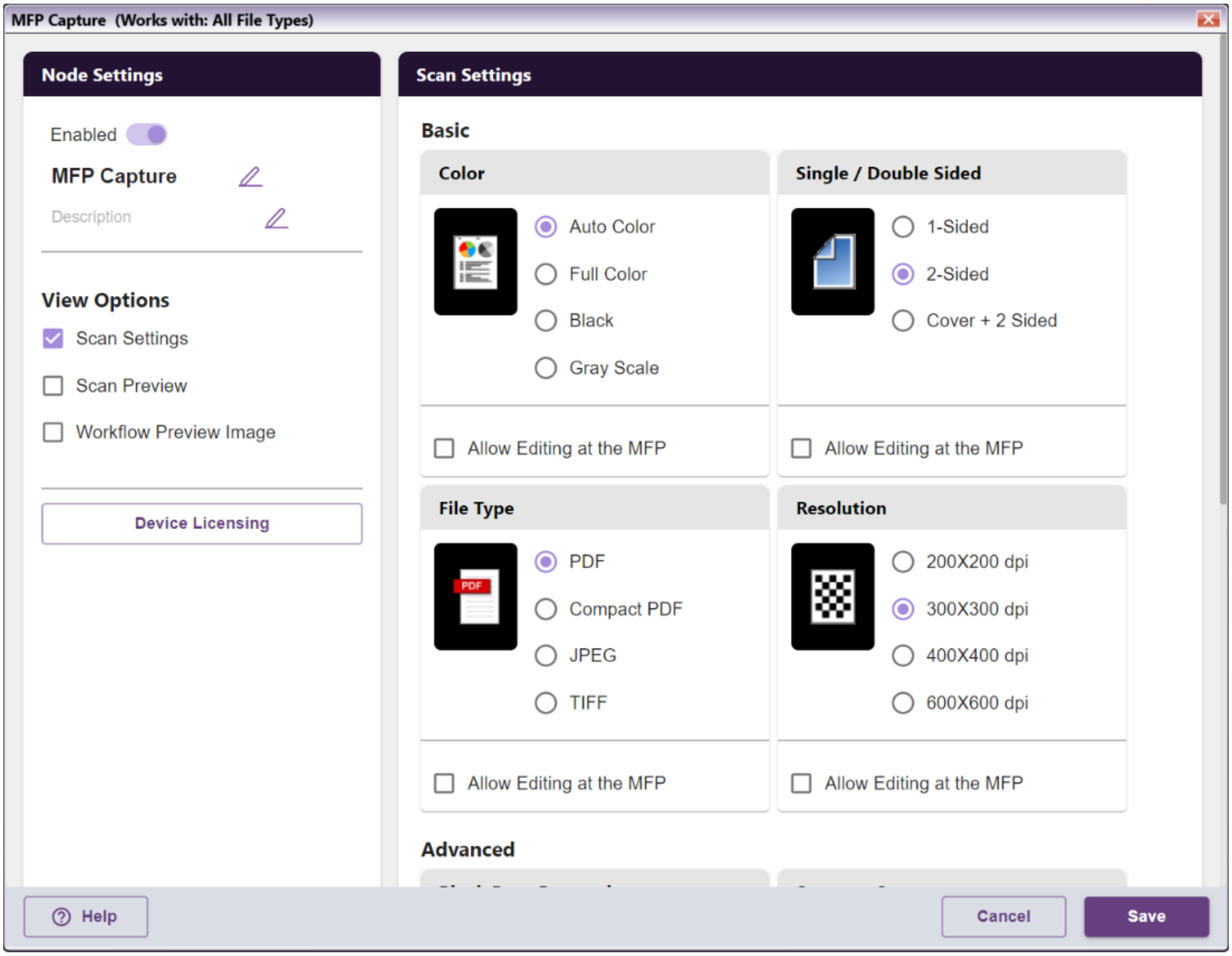
Note: The DSP Web In node will collect documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

MFP Capture

Dispatcher Stratus 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.

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**.

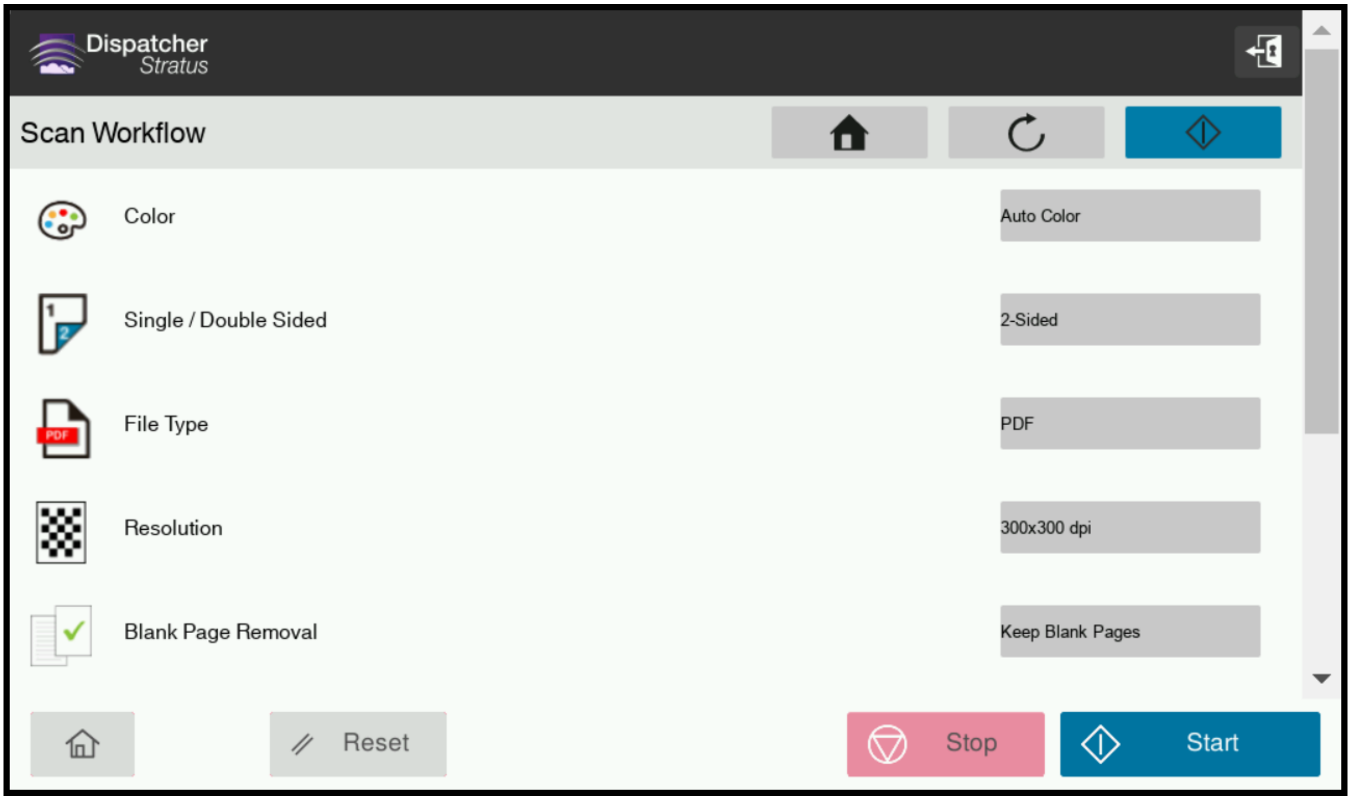
In addition, each setting has a checkbox to allow editing of the setting at the MFP. If the box is unchecked, the user cannot change that scan setting at scan time.

Important! Only MFPs that support the **Dispatcher Stratus 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 Stratus 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.

Microsoft Exchange In

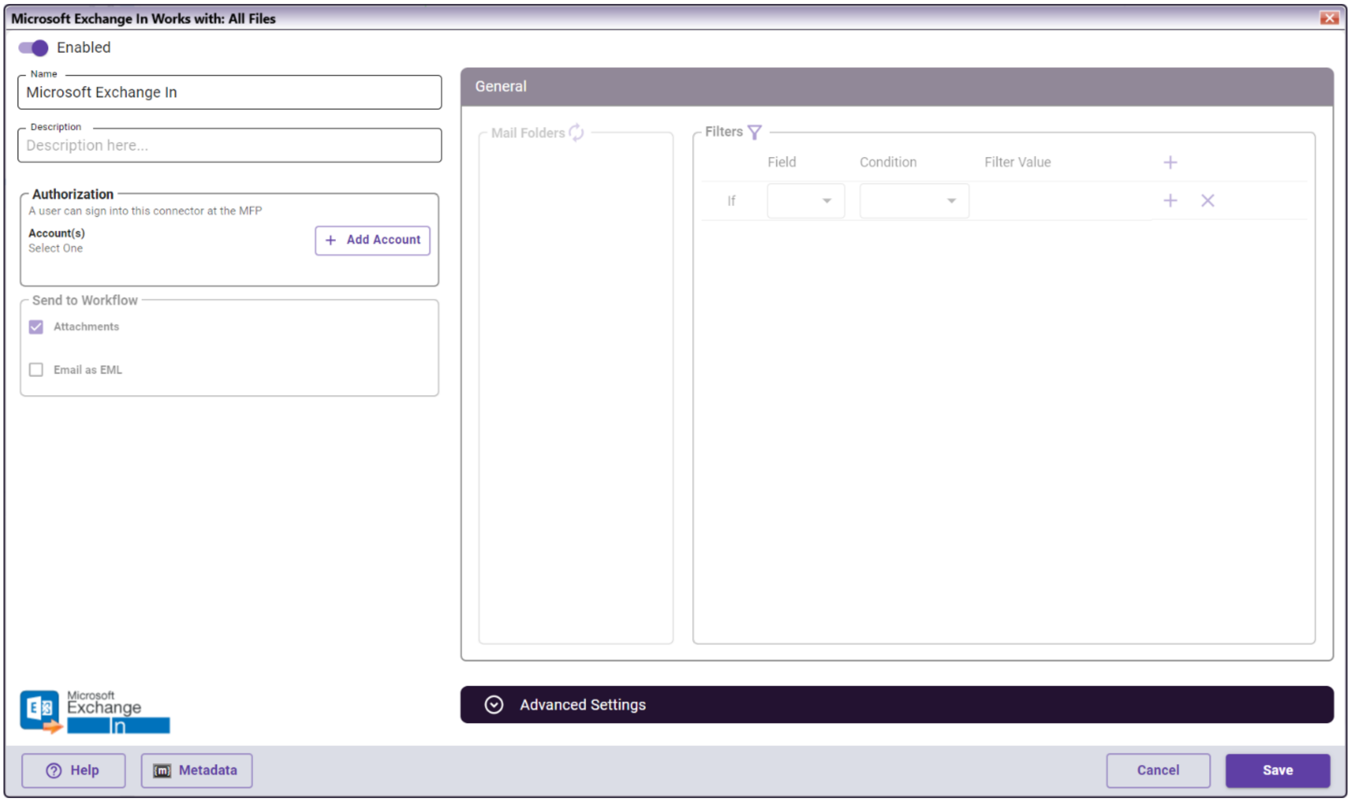
The **Microsoft Exchange In** node actively monitors incoming and existing emails from a folder in an Exchange Online mailbox. Emails can be dynamically filtered by a variety of fields including To, From, CC, BCC, Date, Size, Body, Subject and Header data to ensure that Dispatcher Stratus is collecting the content that needs to be processed within the workflow.

Important! You must have an available **device license** to save your Microsoft Exchange In node configuration.

To open the Microsoft Exchange In node's configuration window, add a Collection node for Microsoft Exchange to your workflow and double-click on it.

Configuring the Microsoft Exchange In Node

The Microsoft Exchange In node appears in the following illustration:



- **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. While the workflow will still validate, documents will not be output from this node and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other.

Buttons

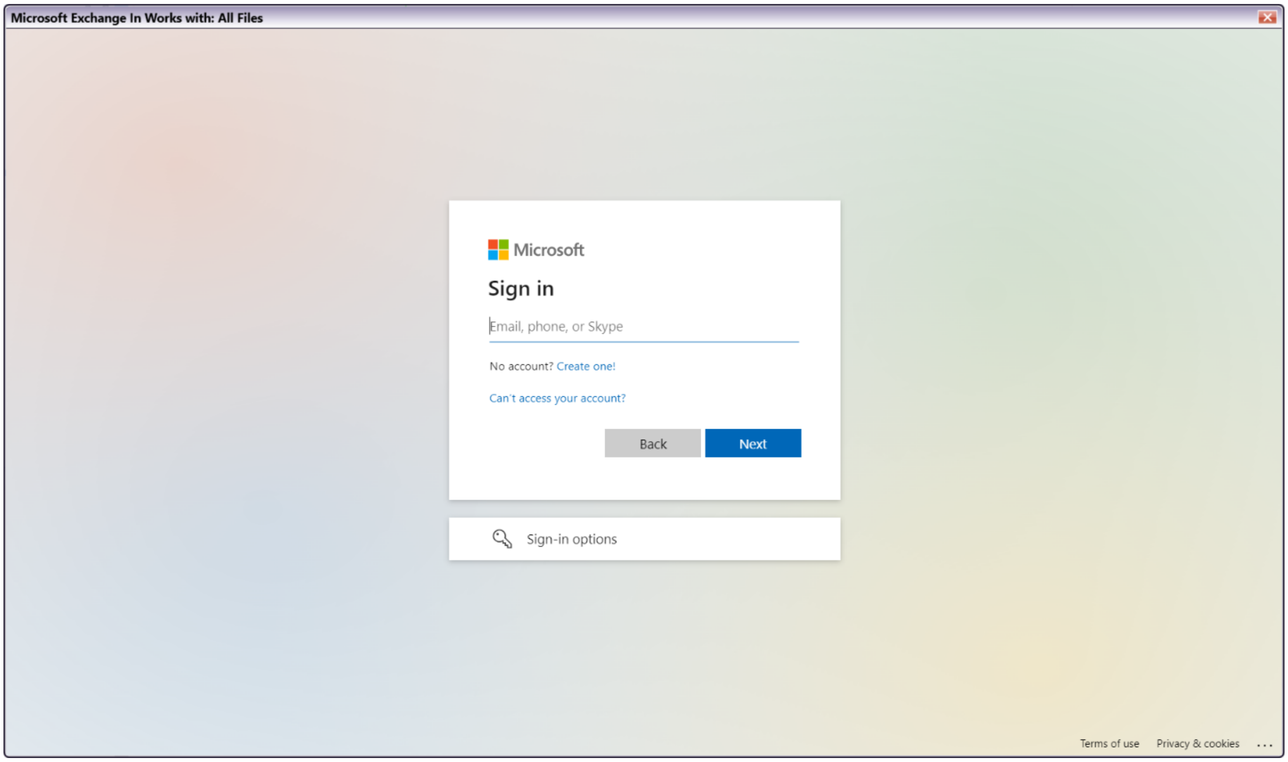
- **Help** - To access Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.

- **Save** - To preserve your node configuration and exit the window, click this button.

Connecting to Microsoft Exchange

To connect to Microsoft Exchange, do the following:

1. Click the **Add Account** button. This will open the Microsoft login.



2. Enter the login information for the Microsoft account. Then, click **Log In**.

This will bring you back to the Microsoft Exchange In node to complete configuration. If there is more than one account available, you can select the account you want by clicking the radio button next to the desired account.

To modify the default Connection Timeout (the seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs), enter a value in the **Connection Timeout** field.

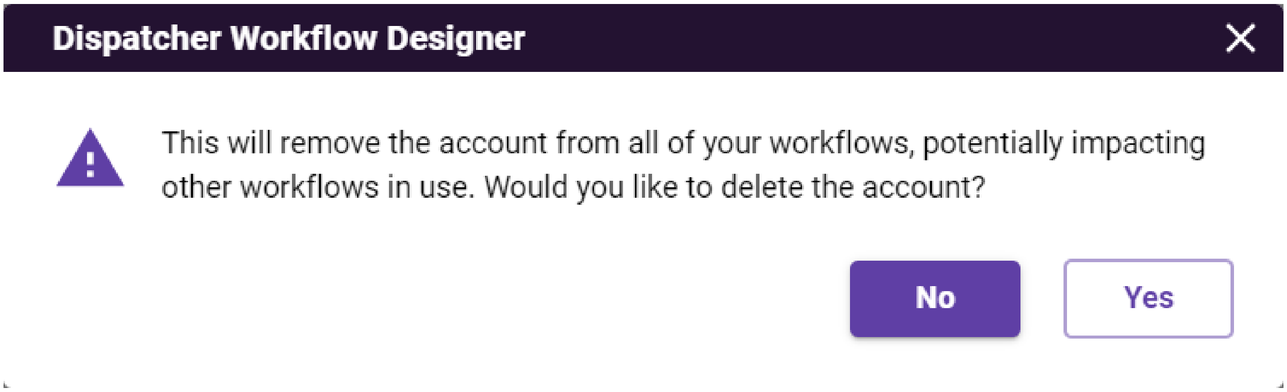
Deleting an Account

To delete an account, click the **Delete** icon next to the account you would like to delete. This will open a window with the following options:

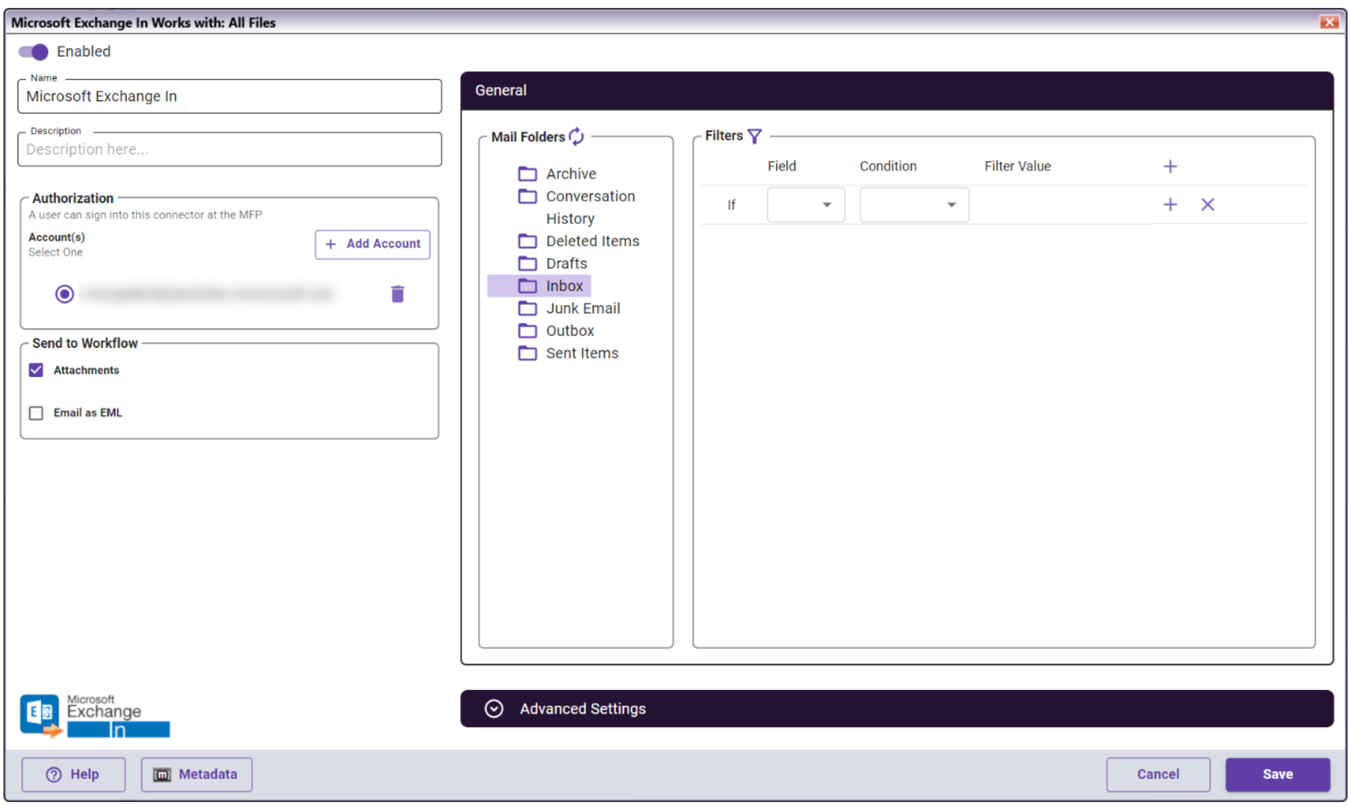
- **No** - This cancels the delete action and returns you to the node configuration window.
- **Yes** This deletes the account in this node. The account can be added again later.

- **Yes, Permanently** - This deletes the account from the tenant, including all workflows. The account can be added again later.To continue with this action, select **Yes**.

  Caution! Selecting this option can impact workflow performance.



Document Options



Options for collecting emails and attachments include:

- **Attachments** - Selecting this option collects email attachments for use within the workflow.
- **Email as EML** - Selecting this option collects the email content as an EML file

Node Configuration

The **General** section will auto-populate with your Mail Folders once you have successfully added and selected an account. You can use the refresh button to repopulate the Mail Folders at any time.

In the **Mail Folders** area, select the folder(s) from which emails should be collected.

In the **Filters** area, select the criteria needed for the system to identify and collect all emails relevant to the workflow. To add a filter, use the **+** button in the upper right-hand corner.

Filters

Emails collected into a Dispatcher Stratus workflow with Microsoft Exchange In can be filtered by the following fields:

Field	Description
Attachment Name	The name of each individual email attachment.
Attachment Size	The size of each individual email attachment.
Attachments	The presence of attachments in an email (i.e., has attachments or doesn't have attachments).
Bcc Address	The list of addresses that are blind carbon copied.
Body	The content included in the body of the email.
Cc Address	The list of addresses that are carbon copied.
Date	The time period in which the email was sent or received.
Email Size	The total size of the email including attachments.
From Address	The email address of the account that the email was sent from.
Headers	The header content of an email. At least one element of the header must match a filter value.
Read	The status of the email (i.e., read or unread).
Subject	The subject line of the email.
To Address	The recipient address of the email.
Total Attachment Size	The total size of all of the attachments included on an email.

For fields with customizable content, a variable **Condition** and **Filter Value** can be specified. Options for Conditions may include:

- Contains
- Doesn’t Contain
- Ends With
- Is
- Regular Expression
- Starts With

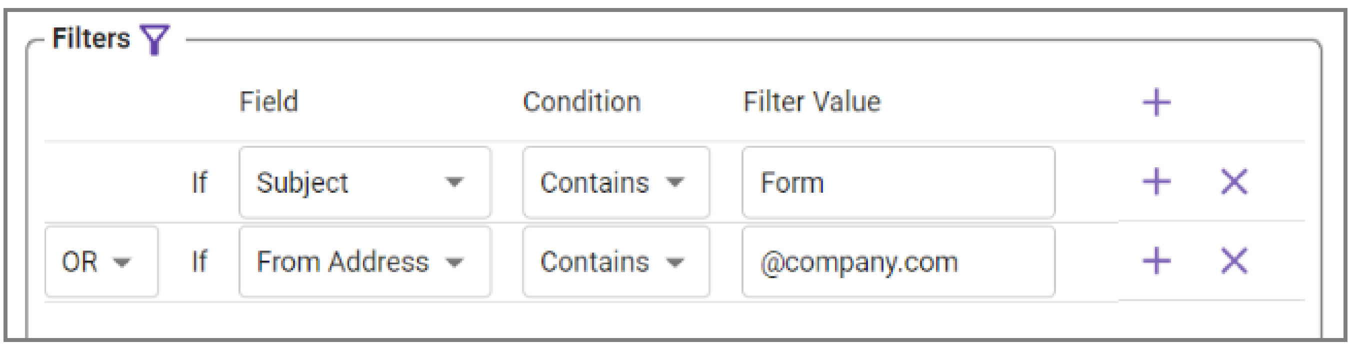
After adding more than one filter to the node, you can define filter logic. For example, your node may include the following two filter conditions:

```
1. Subject contains: "Form"
2. From Address contains: "@company.com"
```

By default, the **AND** filter logic will be applied to these two filters. This means that any emails in your designated folder which have a subject that contains the word “Form” and that are from a person with an @company.com email address will be automatically pulled into the workflow.

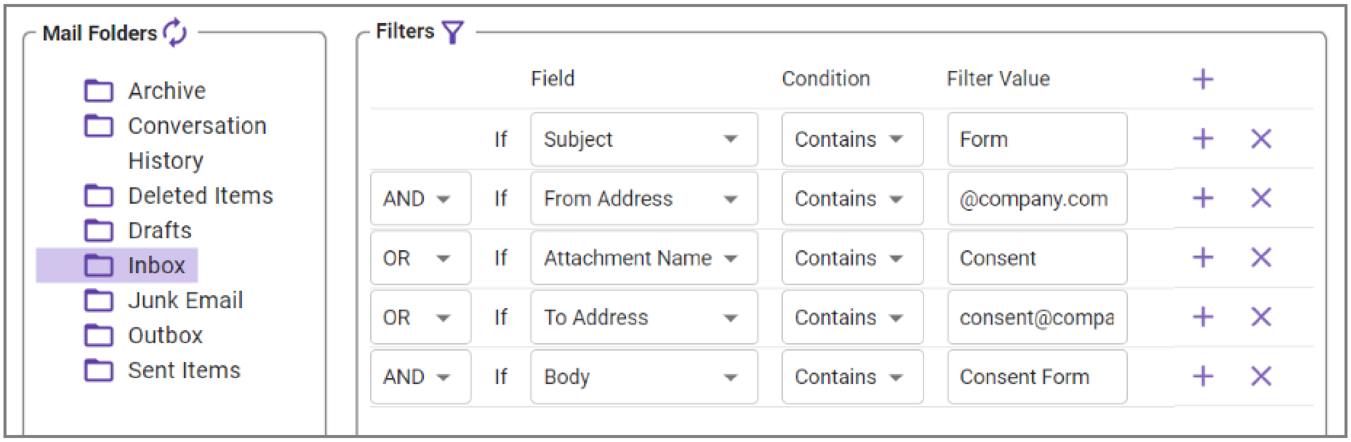
Note: Filter values are case sensitive.

In some cases, you may need to find emails by sender **OR** the subject of the email. In this case, you would change the filter logic selection to **OR**.



Consecutive **AND** filters create a group of conditions while an **OR** separates filters from one another. For example:

```
(Filter 1 AND Filter 2) OR (Filter 3) OR (Filter 4 and Filter 5)
```



Test Filters

You can test your filter setup by using the Test Filter button near the top of the window. Results from the filter configuration appear below, and you can then select one of the resulting emails to see a preview of it.

Important! The test filter feature scans 250 emails at a time and provides the results. At the bottom of the results is a **Scan More Emails** button that will scan the next 250 emails and add those results.

Collection Option

In the **Collection option** section, you have the following options:

- **Process as group** - To process files from the selected folder as a group, check this box. To process files individually, leave the box blank.
- **Delete document from server** - To delete files from the Microsoft Exchange server on collection, check this box. Otherwise, leave the box blank.

Advanced Settings

There are several options available to further modify emails and attachments after they have been processed by the Microsoft Exchange In node.

After Collection

There are several options that allow you to customize your view of files and folders within the Microsoft Exchange In node:

- **Process as Group** - Use this option to process emails in groups of 500 or less.

- **Delete email from server** - Emails are deleted, but are still accessible from within the Microsoft Exchange client.
- **Mark as read** - Mark the email as read in the email server
- **Move to mail folder** - Select the folder where the email should be stored once it has been collected from the email server and processed through the workflow.

Metadata Extraction

The following are options to extract from emails. To pass some or all of the available metadata on to other nodes in the workflow, ensure the appropriate boxes are checked.

Metadata Value	Description
{msexchangein:attachmentfiletype}	The type of file that was attached to the email, such as PDF or JPEG.
{msexchangein:attachmentname}	The name of each individual email attachment.
{msexchangein:attachmentsize}	The size of each individual email attachment.
{msexchangein:bccrecipients}	The list of addresses that are blind carbon copied.
{msexchangein:body}	The contents of the email body.
{msexchangein:ccrecipients}	The list of addresses that are carbon copied.
{msexchangein:date}	The date on which the email was sent or received from the account holder.
{msexchangein:fromaddress}	The email address of the account from which the email was sent.
{msexchangein:headers}	The header content of an email, such as the subject and date.
{msexchangein:subject}	The subject line of the email.
{msexchangein:toaddress}	The recipient address of the email.
{msexchangein:totalattachmentsize}	The total size of all attachments within the email.

You can also check the **Select All** box to select all metadata options. Deselecting this option deselects all metadata options, causing the node to not capture any metadata.

Upland InterFAX In

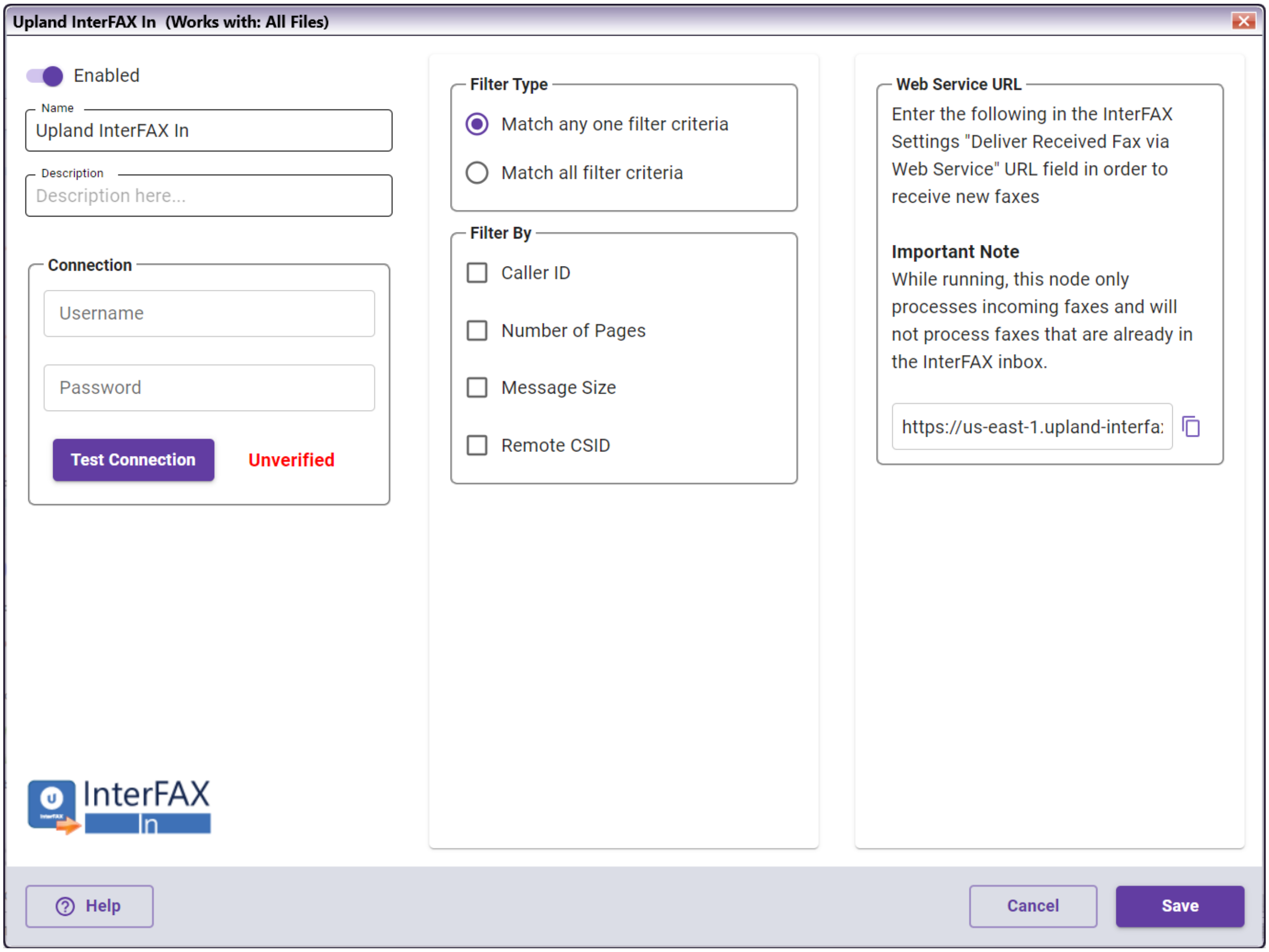
The **Upland InterFAX In** node actively monitors incoming and existing faxes from Upland's InterFAX digital fax service. Faxes can be dynamically filtered by a variety of fields including Caller ID, Message Size, and more, to ensure that Dispatcher Stratus is collecting the content that needs to be processed within the workflow.

Important! You must have an available **device license** to save your Upland InterFAX In node configuration.

To open the Upland InterFAX In node's configuration window, add a Collection node for Upland InterFAX to your workflow and double-click on it.

Configuring the Upland InterFAX In Node

The Upland InterFAX In node appears in the following illustration:



- **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. While the workflow will still validate, documents will not be output from this node and may be lost. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other.

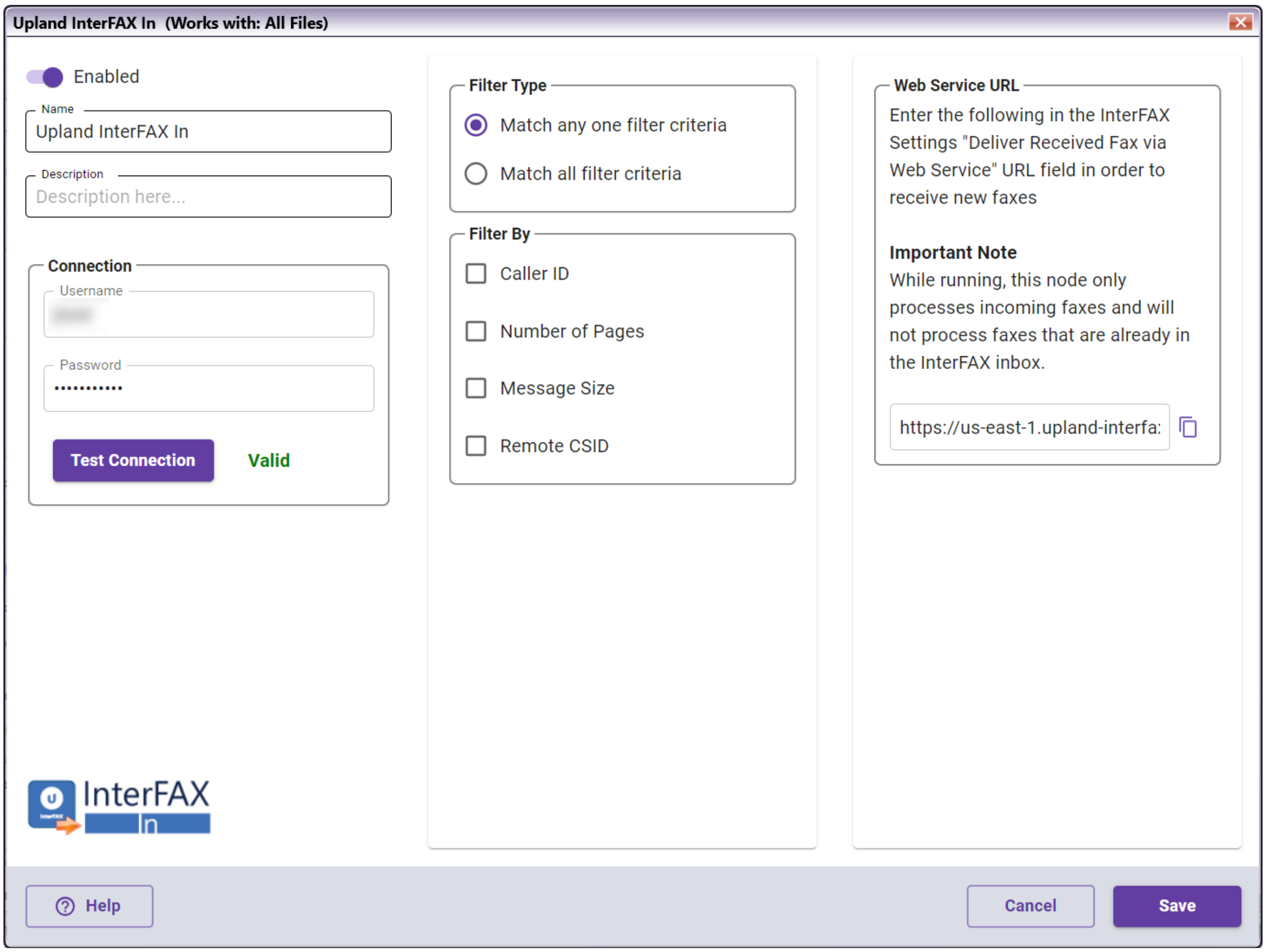
Buttons

- **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.

Connecting to Upland InterFAX

To connect to Upland InterFAX, do the following:

1. Enter the **Username** and **Password** for the InterFAX account.
2. Click **Test Connection**.
3. If successful, you will see a “Valid” message. If the login attempt was unsuccessful, you will see an “Invalid Username/Password” message.



Configuration

The Upland InterFAX In node has a number of configuration options.

Filter Type:

The Upland InterFAX In node supports using multiple filters together. Options include:

- **Match any one filter criteria** - Selecting this option will allow the node to collect any fax that matches at least one of the specified criteria. By default, this option is selected.
- **Match all filter criteria** - Selecting this option will limit the node to only collecting faxes that match all of the specified criteria.

Filter By

The Filters area provides additional means by which you can limit the faxes that the node processes, described below. Faxes collected into a Dispatcher Phoenix workflow with the Upland InterFAX In node can be filtered by the following fields:

Field	Description	Filter Type
Caller ID	The caller ID of sender.	Matches Does not match Contains Does not contain Starts with Ends with Regular expression
Number of pages	The number of pages in the fax.	Equal to Not equal to Greater than Less than Greater than or equal to Less than or equal to In between
Message size	The total file size of the fax.	Equal to Not equal to Greater than Less than Greater than or equal to Less than or equal to In between **Note:** Message size can be measured in Bytes, KB, or MB.
Remote CSID	The Remote CSID of sender.	Matches Does not match Contains Does not contain Starts with Ends with Regular expression Match Case

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**
People Nodes	**People Group** **People Queue** **People User** **People - Edit and Approve** **People Queue- Edit and Approve**

Supported Files for Imaging Processes

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

- PDF
- BMP
- GIF
- JPG

- PNG
- TIFF

Notes:

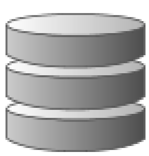
- Since WIC can support additional formats through the use of codecs, Dispatcher Stratus has the potential to support many more image formats. However, these additional file types have not undergone thorough testing for use with Dispatcher Stratus and results may be unpredictable.
- Unsupported file 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.

Database

ODBC



ODBC

The ODBC process node allows you to do the following:

- Retrieve data from an ODBC (Open Database Connectivity) data source and associate it with the file as metadata (e.g., {odbc:column name}).
- Use existing metadata associated with a file or workflow in order to update data in the ODBC data source.

Note: ODBC metadata variables are case-sensitive. When using ODBC metadata in your workflow, make sure that you use the appropriate case.

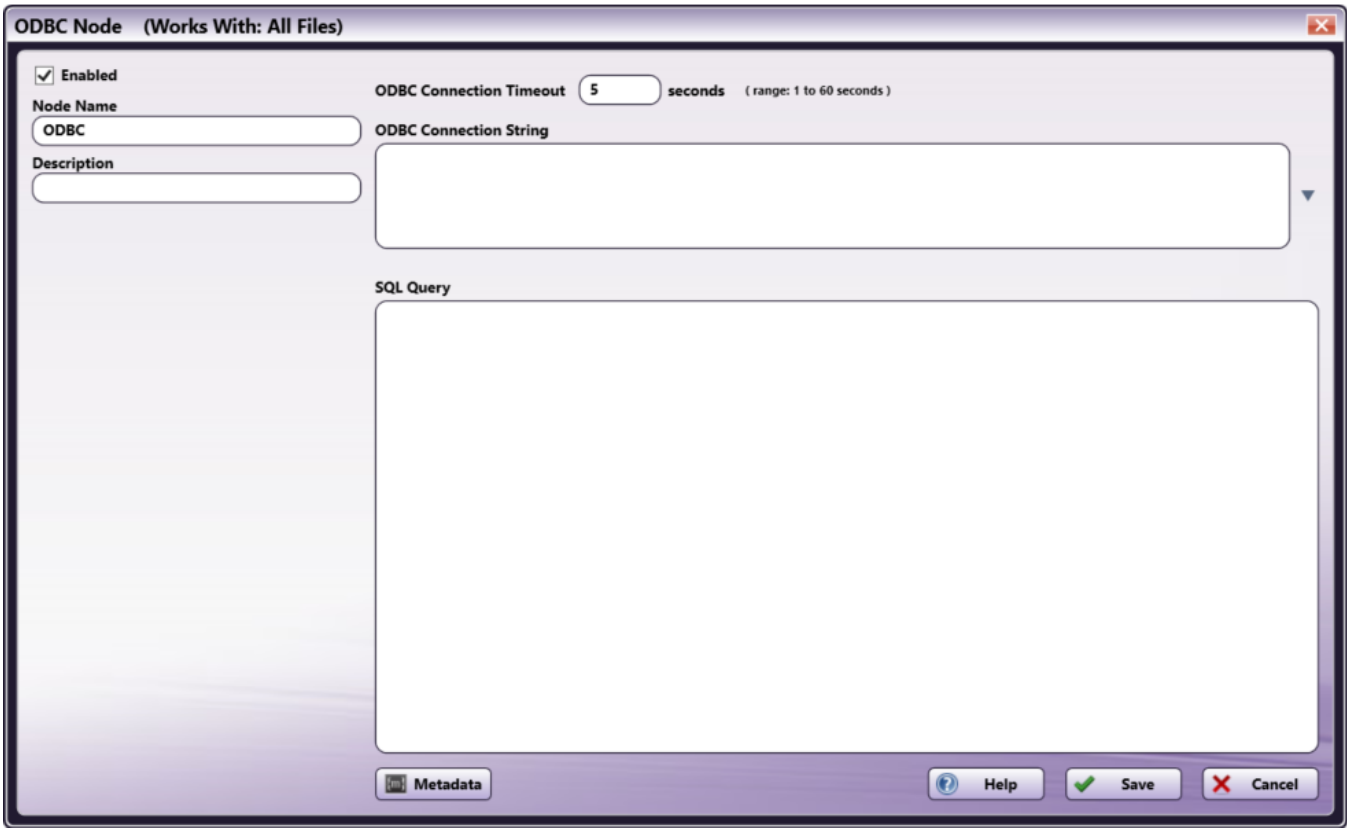
Overview of ODBC

The following section provides brief definitions of ODBC and its infrastructure.

- **ODBC.** ODBC is the open standard method for connecting applications to database servers for the purposes of accessing data. For example, ODBC allows Dispatcher Stratus users to connect transparently to a data source at the MFP panel.

- **Data Source.** A database that contains data to be used by an application. Examples include a SQL Server database or a Microsoft Access database.
- **ODBC Drivers.** In order for databases to be accessible to applications like Dispatcher Stratus , drivers must be installed on the client system where the application resides. The ODBC driver connects to the data source, translates the standard SQL statements into syntax that the data source can process, and returns any requested data to the application. When you connect to a data source from an application through an ODBC driver, the driver makes the connection for you, either locally or across a network.

Configuring the ODBC 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.

Buttons

- **Metadata** - To access the **Metadata Browser** window, click this button.
- **Help** - To access Online Help, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.

Connecting to ODBC

To connect to an ODBC database, do the following:

1. If necessary, enter a value in the Connection Timeout field. This field controls the number of seconds allotted for the time without communication, after initial connection to the server, before a timeout occurs. By default, timeout is set to 5 seconds.
2. Enter a connection string to connect to the appropriate data source in the **ODBC Connection String** area. The application comes with numerous sample connection strings that you can use to help you get started. Click on the **down** arrow on the right side of the ODBC Connection String area to view and select from a list of strings. If you are uncertain about how to enter this information, refer to the documentation for your ODBC Driver and/or database.
3. Enter an SQL query in the SQL Query field.

   Notes:

   - While SQL is standardized, there may be driver-specific deviations to account for how one database operates.
   - You can use metadata within your SQL queries. To help you integrate these variables, you can click on the **Metadata** button, which will open up the Metadata Browser window. The Metadata Browser window lists all metadata included in the workflow. From the Metadata Browser window, you can drag-and-drop metadata into the ODBC window.

Associating Data from an ODBC Data Source to a File

You can retrieve data from an ODBC data source to be associated with incoming files using the SELECT statement in your SQL query. You can also retrieve specific data from a data source based on the results of a query that uses metadata from the workflow, such as OCR zones and form fields. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Once the data is retrieved from the data source, it is attached to the files as ODBC metadata for future use in the workflow.

Syntax for ODBC metadata is {odbc:[name of variable[page number]]} (e.g., {odbc:address[1]}). When referencing workflow metadata in SQL queries, you must specify a page number in brackets.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

To retrieve all records:

```
SELECT \* from [table name]
```

To retrieve select records based on a specific condition:

```
SELECT [column] FROM [table name] WHERE [column]=’[metadata]’
```

Note: Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the SELECT statement:

Sample Data Source:

Last - **First** - **Address**

```
Doe - John - jdoe@gmail.com
```

```
Doe - Jane - janedoe@gmail.com
```

```
Smith - Jane - jsmith@hotmail.com
```

```
Crockett - Davy - dcrockett@aol.com
```

An OCR zone named “last” has been created to extract last names from incoming documents (using the Advanced OCR node). With the ODBC node, you can retrieve the email address found in a data source for the last name that appears on the document (extracted using the Advanced OCR process). The email address that is found via the ODBC node is attached to the file as ODBC metadata and can then be used in the Email Out node to send the documents to the correct email destination.

To retrieve the email address found in the Address column when the “last” OCR zone metadata {zone:ocr.last} returns “Doe,” use the following statement:

```
SELECT [address] FROM [customers] WHERE [Last]='{ocr:zone.last[1]}'
```

Updating Data Within an ODBC Data Source

Useful for record keeping, you can also update data in an ODBC data source based on other metadata in the workflow, such as OCR zones, Bates stamps, barcodes, and index form fields, using the UPDATE statement in your SQL query. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

Syntax to use for Update statements:

```
UPDATE [table] SET [column]= 'metadata' WHERE [column name]='metadata';
```

Notes:

- Update statements do not produce metadata.
- When referencing workflow metadata in SQL queries, you must specify a page number in brackets (e.g., {bates.YourStamp[1]}.
- Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the UPDATE statement:

Sample Data Source:

File - **Count**

```
xyz - 1

abc - 2

rty - 3

yui - 4
```

You can update a column in the ‘customers’ table when the file name of the incoming document matches another column in the table. For example, every time the “xyz” file is scanned, the count in the “Count” column increases by 1 to record how many times that file has been scanned.

Use the following statement:

```
UPDATE customers SET count=count+1 WHERE file='{file:name}';
```

Inserting Data Into an ODBC Data Source

You can also insert new records into an ODBC data source based on other metadata in the workflow using the INSERT INTO statement in your SQL query. When setting up your SQL query, you can click on the **Metadata** button to open the Metadata Browser window and find the metadata variables that you need.

Note: Supported SQL syntax may differ by driver. Please consult your ODBC Driver and Database for documentation about their supported syntax and operations.

Syntax to use for Insert Into statements:

```
INSERT INTO [table] [column1, column2,…] VALUES [value1, value2, …];
```

Notes:

- Insert statements do not produce metadata.

- When referencing workflow metadata in SQL queries, you must specify a page number in brackets (e.g., {bates.YourStamp[1]}.
- Use single quotes around text values; numeric values do not need to be enclosed in quotes.

Example of SQL Query using the INSERT statement:

Sample Data Source (table name is ‘files’):

File - **Count**

`abc - 1`

`def - 2`

`ghi - 3`

`jkl - 4`

You can insert a new record with the following data of ‘mno’ and ‘5’ into the ‘files’ table, using the following statement:

```
INSERT INTO files (File, Count) VALUES ('mno', 5);
```

Document Manipulation

Annotation

Use this node to add an annotation to documents in a workflow. For example, you can:

- Annotate documents with an identifying number or time stamp.
- Specify font size and color for annotated text.
- Restrict the annotations to specific pages in a document.
- More.

To apply multiple annotations to a workflow, you must add an Annotation node for each. You can give each annotation a unique location on the page. While a single annotation can consist of multiple components such as time and date, components in an annotation cannot be individually placed on the page.

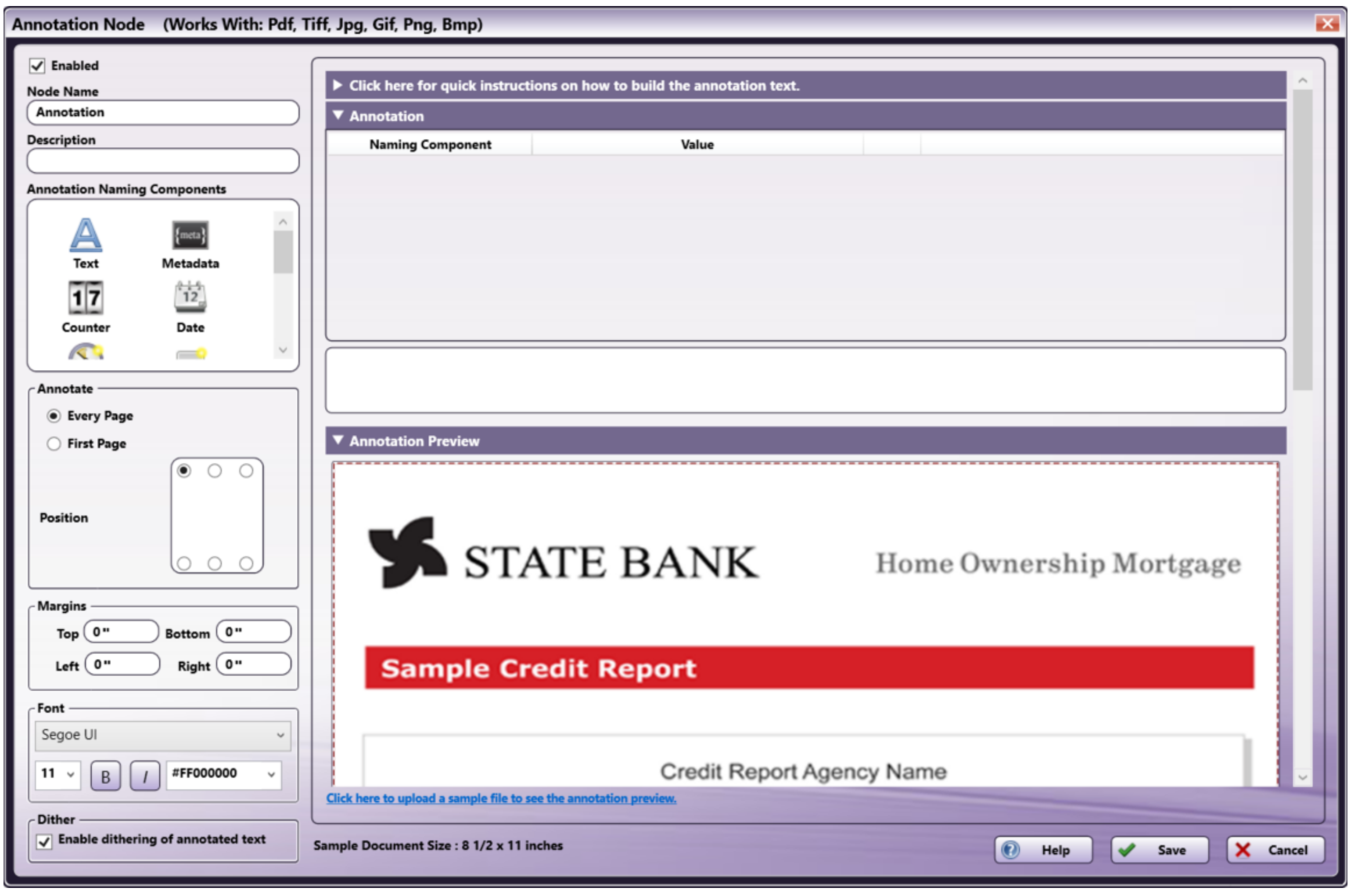
Supported file types include:

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

Note: The Annotation node does not support AES (Advanced Encryption Standard) PDFs.

To add annotations to documents in a workflow, add an Annotation process node to the workflow and double-click on it.

Configuring the Annotation Node



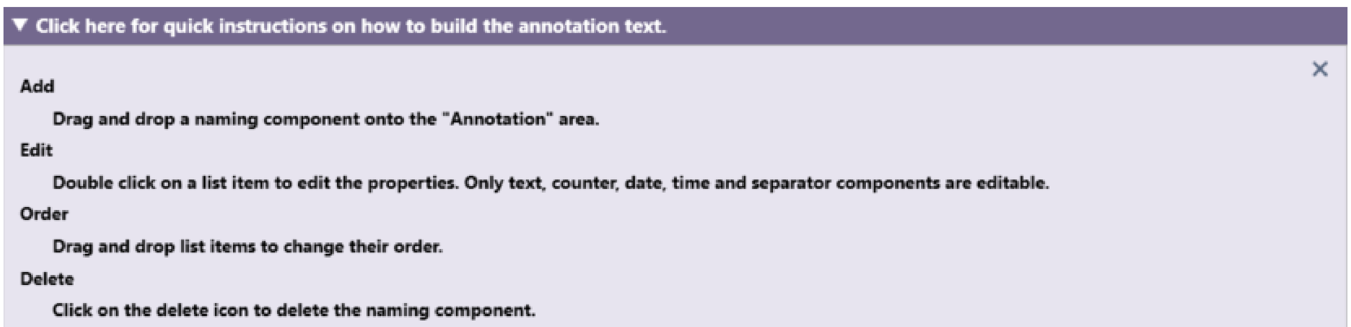
- **Enabled** - To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.

- **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.

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.

For quick instructions on how to build annotation text, click on the top bar above the Annotation area. To hide the instructions, click on the bar again. See the following illustration:



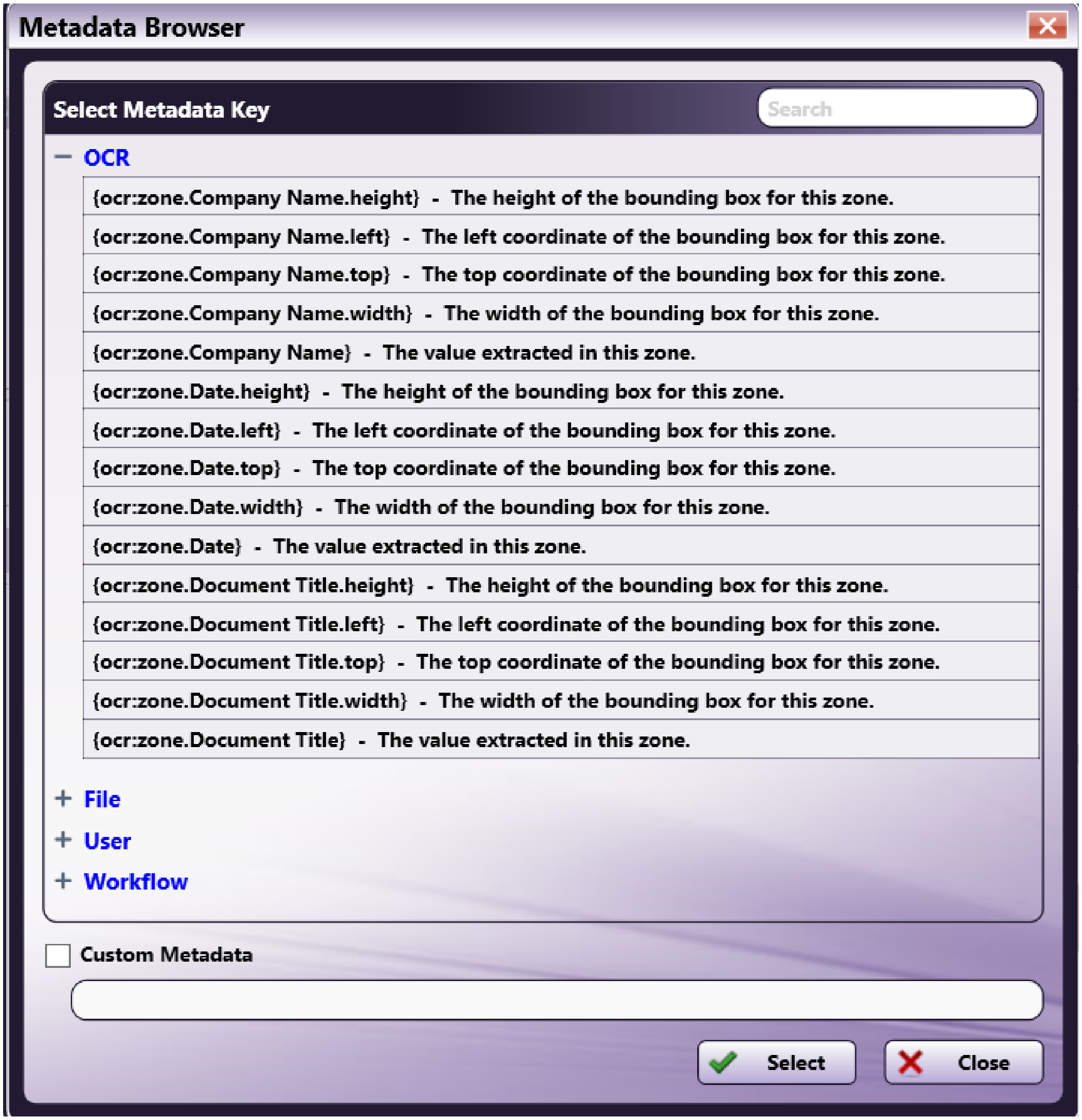
Annotation Naming Components Panel

Use this panel to drag one or more of the following components into the **Annotation** area. A preview of the annotation appears below the **Annotation area**.

- **Text** - Enter any text string you want to include in the annotation. With this component, you can also use file-level dynamic variables. For example, to include the file’s entire file name in the annotation, enter {file:fullname}. Note that text will only wrap if spaces are present in the annotation.
- **Metadata** - Use this component to create annotations based on document metadata. Double-click on the Metadata component and then select **Select Metadata Key**. The **Metadata Browser** window appears, displaying system-defined variables (Date, File, System, User). If you have added other nodes to the workflow, metadata from those nodes appears as well.

  In 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, to view the in Input Folder metadata, click on the **+** sign next to Input Folder. See the following illustration:



  - **Collapse the list** by clicking on the - sign next to the appropriate metadata.
  - **Choose metadata** to add to the annotation by selecting a metadata key and then the **Select** button. The Metadata Browser closes and you return to the Annotate window.
  - **Specify a page-level and/or occurrence number** for the metadata reference by clicking on the Custom check box, dragging-dropping the metadata in the empty field provided, and entering the correct syntax.
  - **Search for metadata** by entering a text string into the Search field.
- **Counter** - Add a sequential counter. The maximum number of digits for a numeric counter is 18. Note that after you run the workflow for the first time, the counter will no longer be editable (in order to maintain count integrity). You have the following options:

- **Start Value** - Specify the number at which to start the counter.
- **End Value** - Specify a maximum value for the counter.
- **Increment By** - Specify the number at which to increment the counter. The default is 1.
- **Leading Zeros** - To include leading zeros, select the box.

- **Date** - Include the date on which the workflow processed the document. Double-click to choose the date format.
- **Time** - Include the time at which the workflow processed the document. Double-click to choose the time format.
- **Separator** - Separate two components, for example with a dash. Double-click to view a list of available separators.
- **File Name** - Include the original file name.
- **File Extension** - Include the original file extension.
- **File Size** - Include the file size.
- **Page Number**, **Image Width**, **Image Height** - Includes one or more of these details about the file. Width and height display in pixels.

Annotation Area

Once you populate the Annotation area with components from the **Annotation Naming Components Panel**, you can:

- Configure certain components by double-clicking on them.
- Change the order of the components by dragging them to the desired position.
- Delete a component by selecting the **X**.

The following panels provide additional configuration options:

- **Annotate panel** - The following options are available:
    - **Every page** - Add the annotation to every page.
    - **First Page** - Add the annotation to the first page only.
    - **Position** - Specify the location at which to position the annotation text. Note that modifications made via the Margins panel affect the positioning you specify here.
- **Margins panel** - The margins for annotation text are indicated in the Annotation Preview area by dotted lines. Margins are measured in inches. Enter a new value into any of the **Top, Bottom, Left,** and **Right** fields, and then press [Enter] or [Tab]. Changes reflect immediately in the Annotation Preview area.
- **Font panel** - Specify the font, size, style, and color of the annotated text.

- **Dither panel** - Select this box to improve clarity when text is opaque or colored on a black & white image.

Annotation Preview

This area provides a preview of your annotation and its placement on the page as soon as you add a component to the Annotation area. A sample document is provided for context. To upload your own sample file, select the **Click here to upload a sample file to see the annotation preview** link on the bottom of the Annotation Preview area and browse to your file in the window that appears.

Notes:

- The preview may not precisely match the actual results. To view the true result, run the workflow.
- PDF files cannot be used as sample documents.

Image Resolution

Dispatcher Stratus attempts to read the resolution of your sample image and scale the annotation font size accordingly. If the resolution cannot be read, a resolution of 96 dpi is assumed for the sample displayed.

Image Color

Dispatcher Stratus maintains the original color palette and image format.

Note: For grayscale or black and white images, any colored text in the annotation color will be converted to black and white. This can result in the annotation not being visible on the processed document. For example, light colored text would render as white and, thus not visible on a white page.

Saving Your Annotation

Preview your annotation text in the area below the **Annotation area**. Use the **Annotation Preview** area to confirm the location and appearance of the text on the document. When ready, select **Save** to preserve your annotation definition.

Note: Once you save the annotation, it can be used by other nodes in the workflow. Use the following syntax:

```
{annotate:text[\<page\>]}.
```

DSP

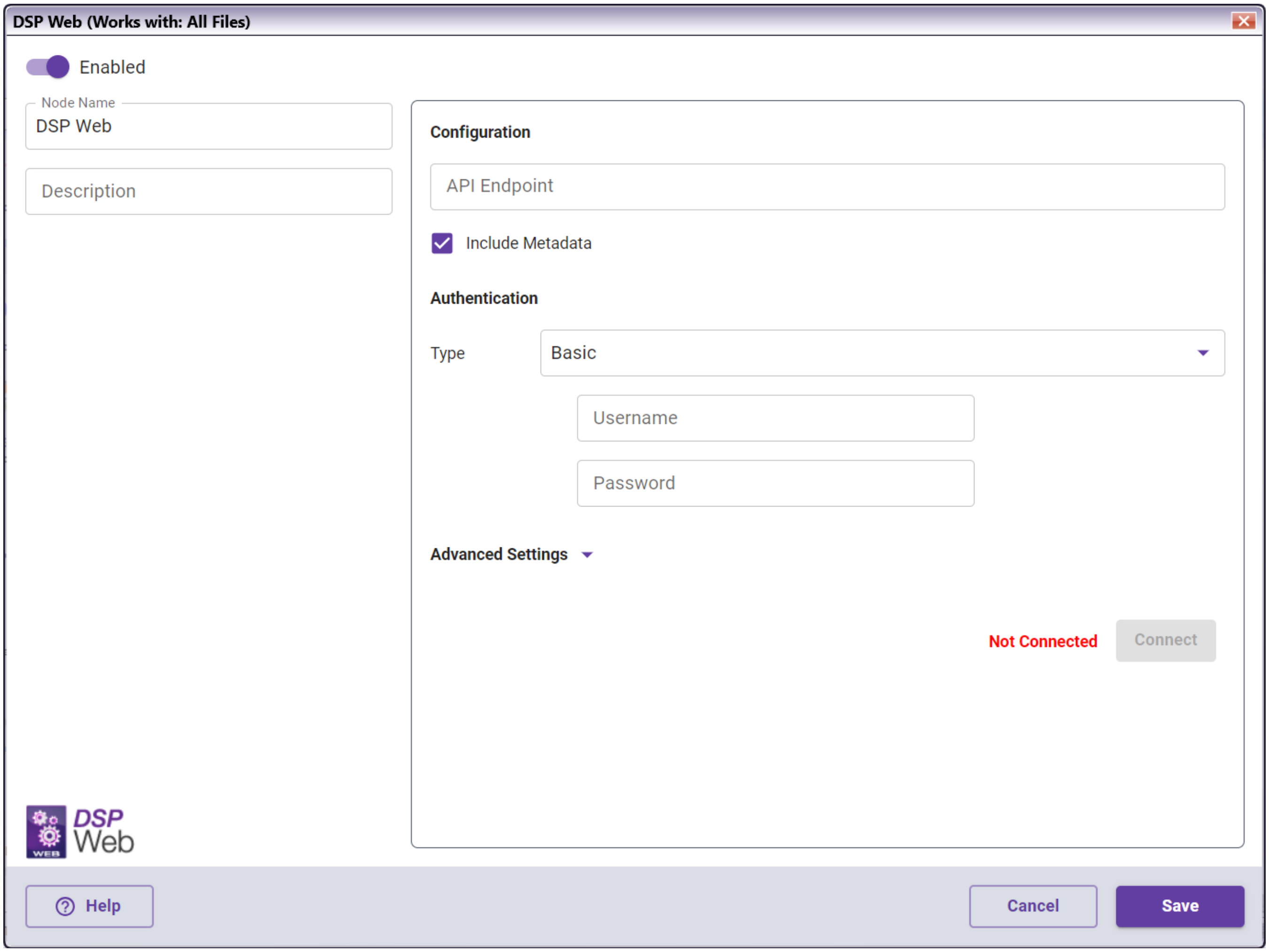
DSP Web

The **DSP Web** node is designed for use with applications/features that have been developed by members of the Dispatcher Stratus Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

To open the DSP Web node's configuration window, add a DSP Web Process node to your workflow and double-click on it.

Configuring the DSP Web Node

The DSP Web node appears in the following illustration:



- **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. While the workflow will still validate, documents will not be output from this node and may be lost. Note that a disabled node does not check for logic or error conditions.

- **Node Name** - The node name defaults to this field. This name appears in the workflow below the node icon. Use this field to specify a meaningful name for the node that indicates its use in the workflow.
- **Node Description** - Enter an optional description for this node. A description can help you remember the purpose of the node in the workflow or distinguish nodes from each other.

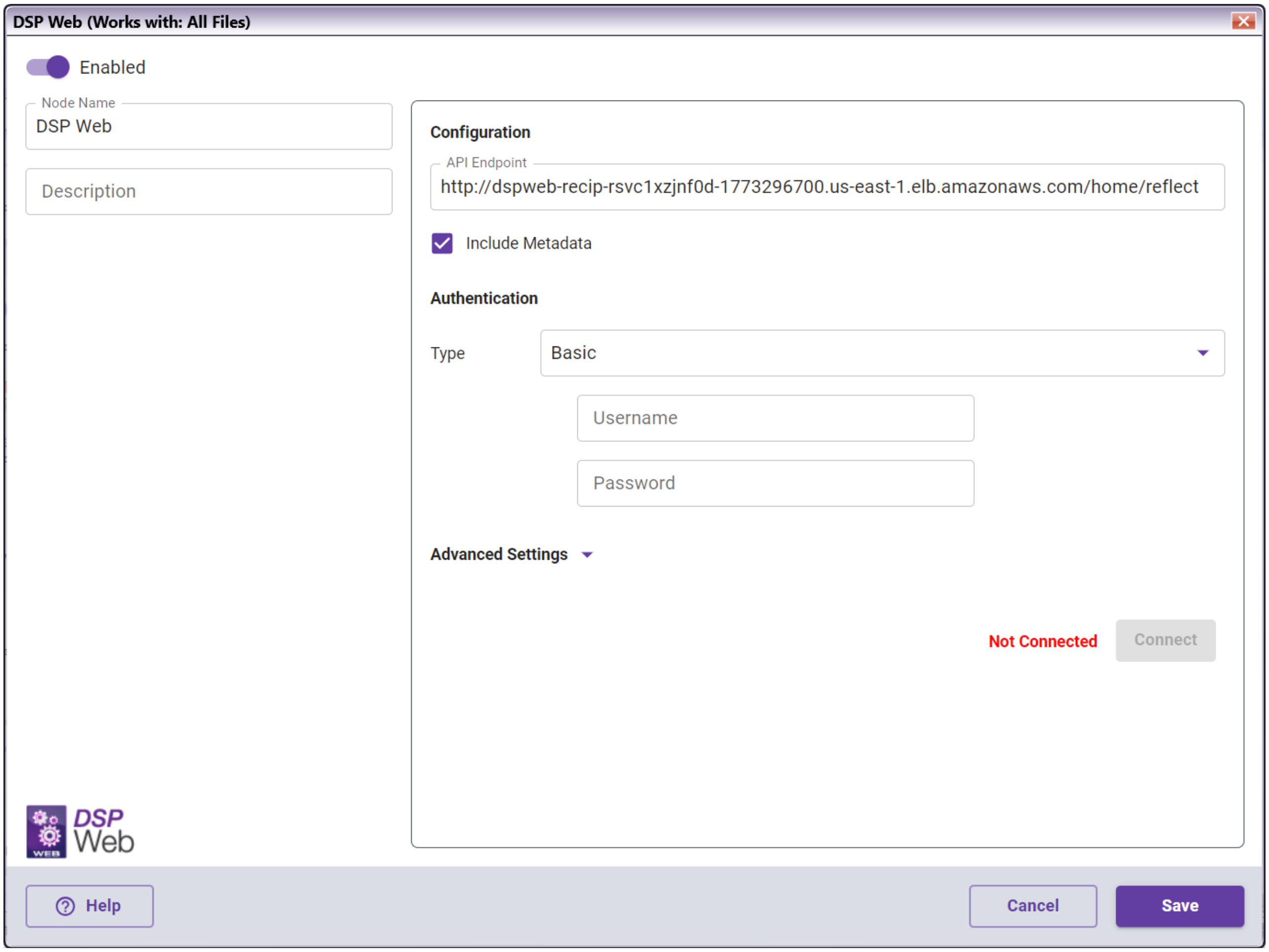
Buttons

- **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.

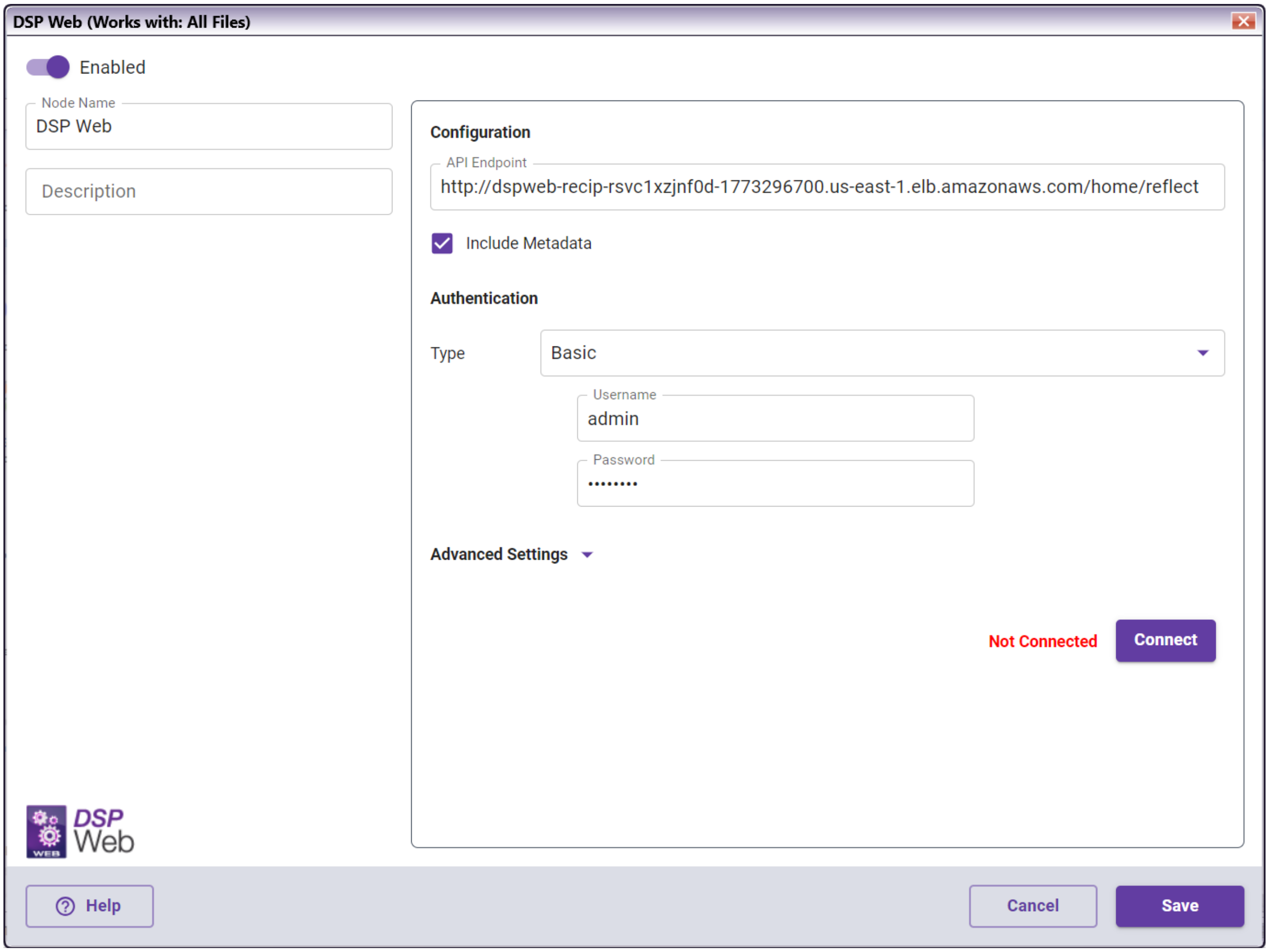
Application Setup

To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API's location (e.g., a URL). To configure the node, do the following:

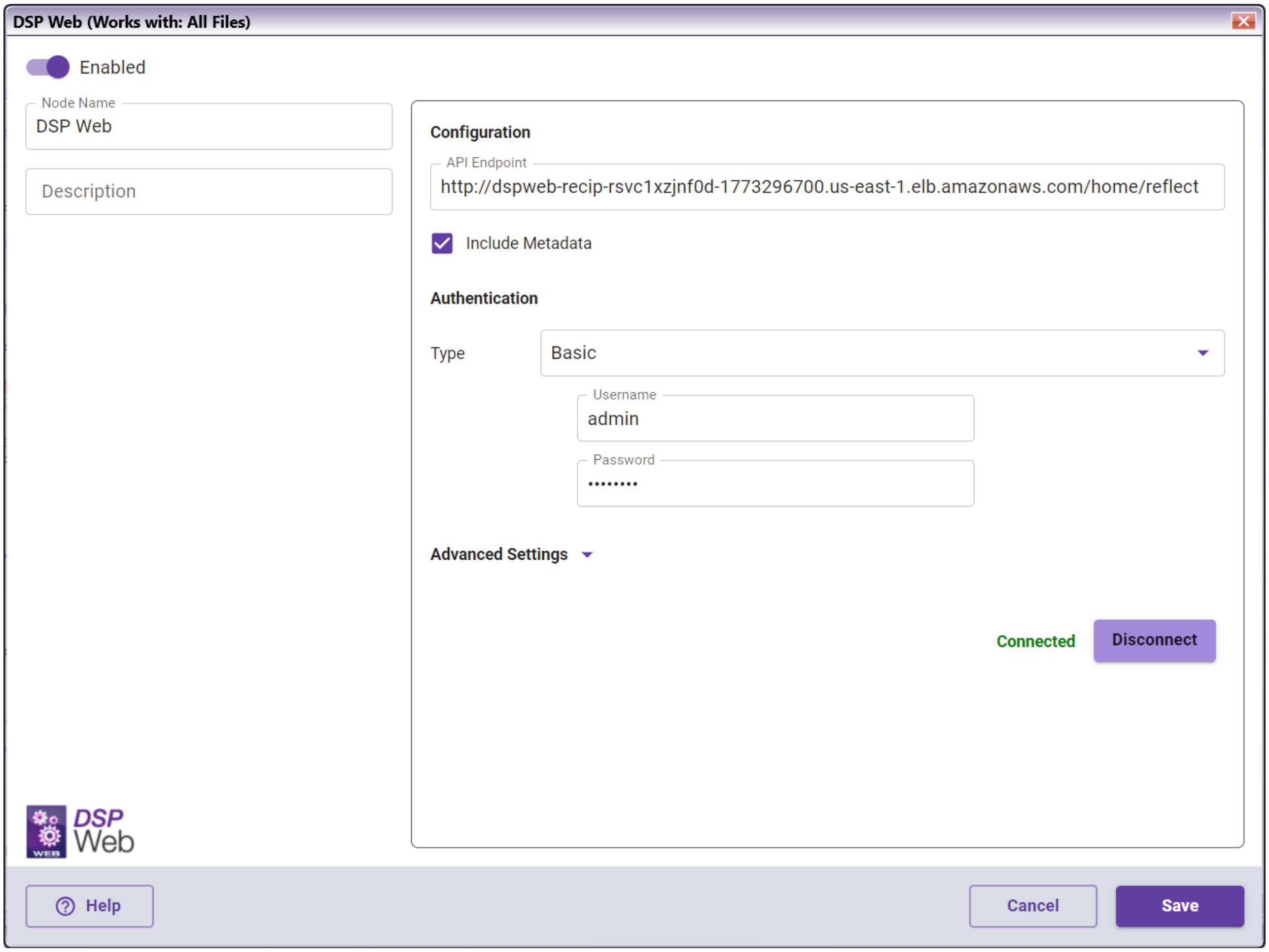
1. Double-click the DSP Web node to open it.
2. Enter the API Endpoint location of the application you would like to connect to the node.



3. Select whether you would like to **Include Metadata**. When this checkbox is selected, the node includes all metadata gathered from previous nodes in the workflow.
4. Select your **Authentication** type. Options include:
    - Basic - This will prompt you to enter your **Username** and **Password**.
    - APIKey - This will prompt you to enter your **Key Name** and **Key Value**.
    - BearerToken - This will prompt you to enter your **Token**.



5. Select the **Connect** button. This will establish a connection between the DSP Web node and the web application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

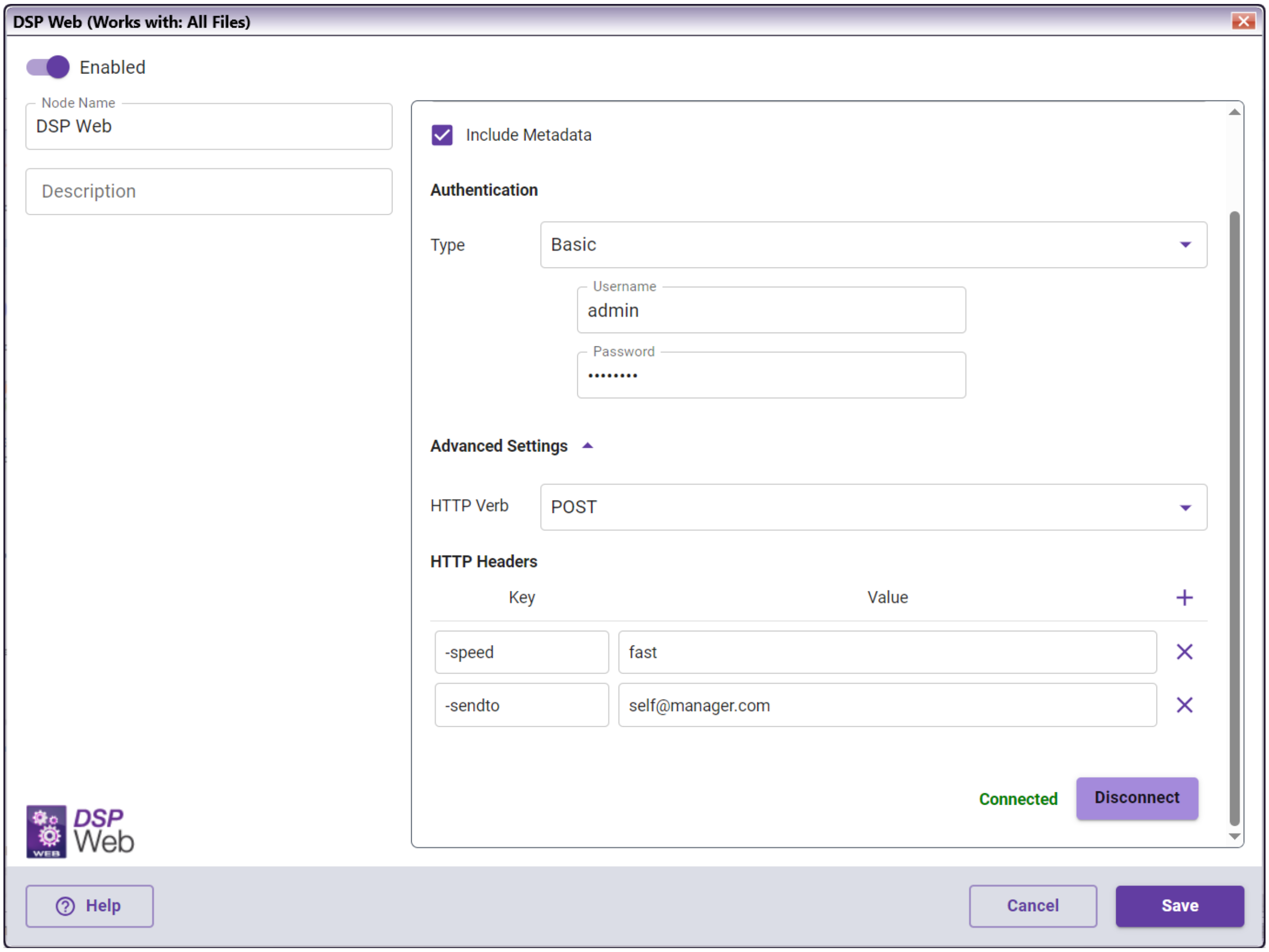


Important! You must select the **Connect** button in order to properly validate the workflow.

Note: Any changes made to the API field, Include Metadata checkbox, and/or Authentication fields will require you to select the **Connect** button to reestablish the connection.

6. If needed, select the **Advanced Settings** drop-down to reveal additional configuration options. You can:
   - Select the **HTTP Verb**. Options include:
     - Get
     - Post
     - Put
     - Patch
     - Delete
   - Add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the

installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header.



7. Save and close the node.

Note: The DSP Web node will process documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

File Conversion

Convert to PDF

Convert to PDF

The Convert to PDF process node converts images and PDFs to different types of PDF documents, including PDF/A-compliant files. Output files can be searchable, editable, and viewable, depending on the settings you define. This node works with the following file types:

- TIF/TIFF
- PNG
- JPG/JPEG
- BMP
- PDF

Notes:

- This node can process GIF files. However, the accuracy of the output may vary.
- The recommended minimum DPI for scanned documents is 200. Better results can be expected for documents 300 DPI and above.
- This node includes the Tesseract OCR engine.

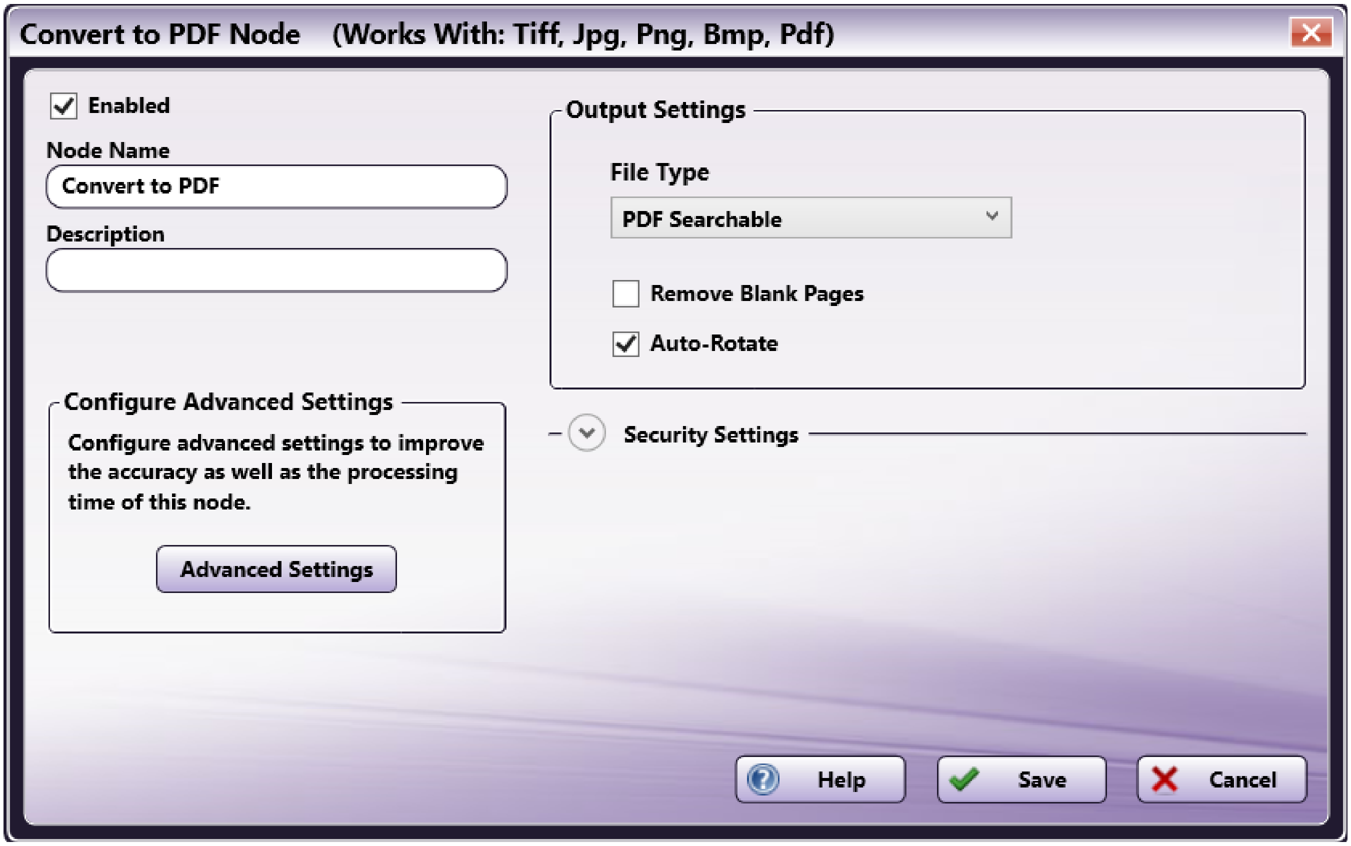
Limits

For incoming documents, any images exceeding the following will not be processed:

- Maximum allowable size: A0 (33.1” x 46.8”)
- Maximum dpi: 2400

Configuring the Convert to PDF Node

To open the Convert to PDF node, drag-drop a Convert to PDF node from the Process panel to the workflow and then double-click on it. The Convert to PDF Properties window opens, as shown below:



Configuring the Convert to PDF 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.

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.

Configure Advanced Settings

To adjust the accuracy and speed of the OCR process, click the **Advanced Settings** button to access the **OCR Settings** window. For example, if the PDF conversion drastically changes the appearance of the output file, use this screen to adjust the OCR settings accordingly.

Output Settings

Use this section to specify your output settings.

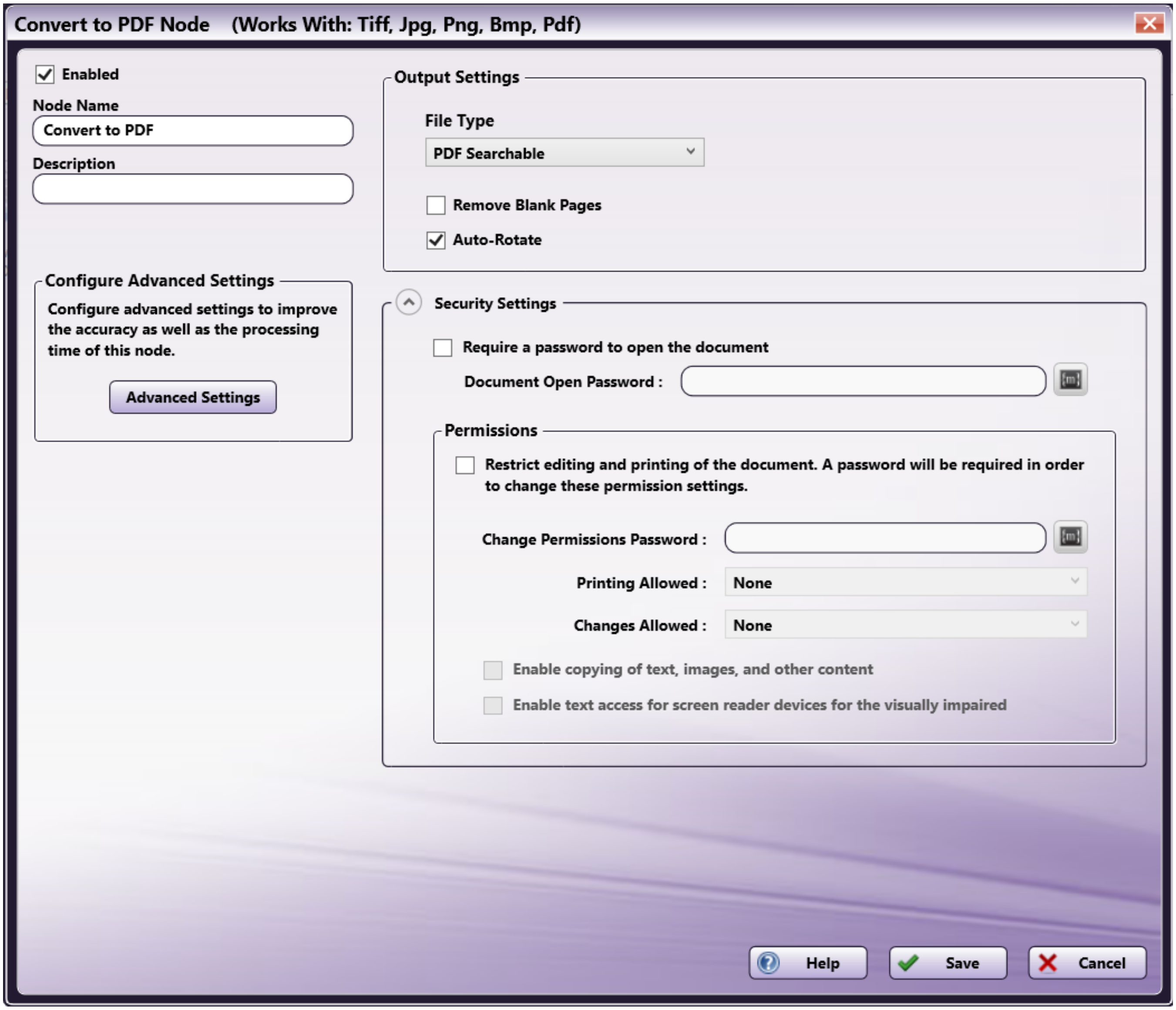
- **File Type** - Choose the output file type. If you click on the drop-down, a list of output options appears.
  Note: To preserve image clarity, including barcodes, select PDF Image Only or PDF Searchable.
- **Remove Blank Pages** - To remove any blank pages from the outputted PDF, check this box.
- **Auto-Rotate** - The **OCR engine** automatically rotates the text appropriately when converting. To prevent automatic rotation of the text, leave the box blank.

Security Settings

Use this area to specify security settings for your PDF documents (with the exception of PDF/A documents). You can use passwords to restrict users from opening, printing, and editing PDF documents.

Note: Password-protected PDFs cannot be printed from a Dispatcher Stratus workflow.

Click the **Security Settings** down arrow. The window expands to show the following information:



- **Require a password to open the document** - To require users to enter a password before opening the PDF, check this box.
- **Document Open Password** - In this field, you can do one of the following:
  - Enter the password to be used.

    OR
  - Select the **Metadata** icon to open the **Metadata Browser** and create a password based on metadata in the document.

Permissions

In this area, you can specify which editing and printing options will be available when the PDF document is opened in another application, along with a permissions password that will be required to change these settings.

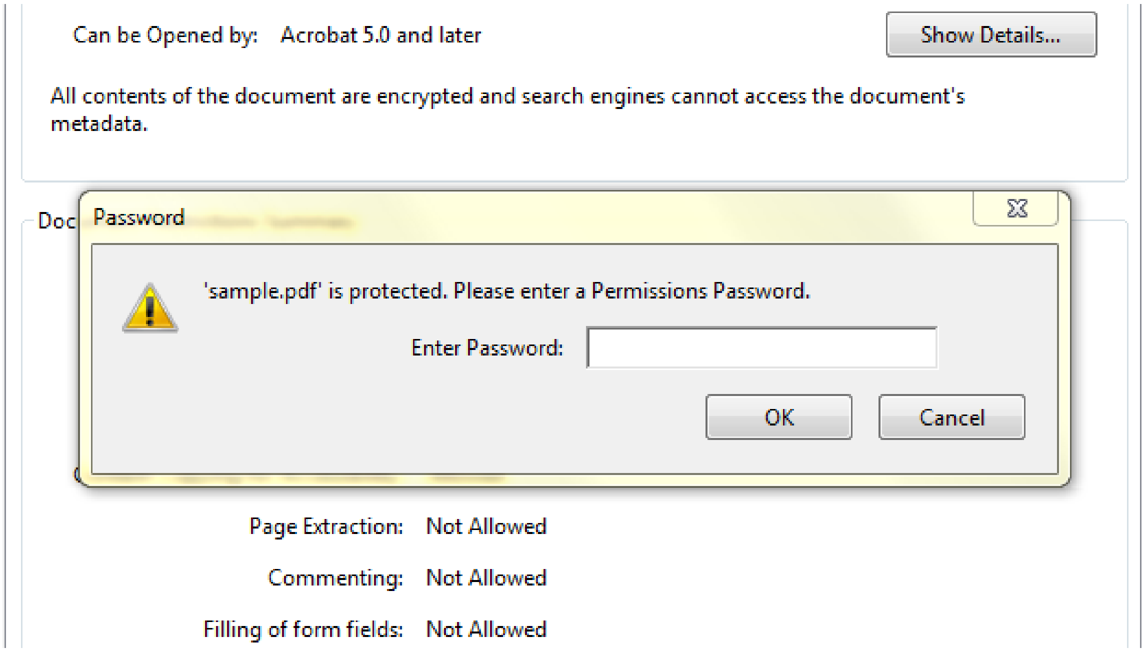
- **Restrict editing and printing of the document** - To restrict editing and printing of the PDF in other applications, check this box. The fields and boxes in this area activate. This password will be required any time a user tries to change any printing and editing settings that you have set in this node.
- **Change Permissions Password** - In this field you can do one of the following:
    - Enter the password to be used.

      OR
    - Select the **Metadata** icon to open the **Metadata Browser** and create a password based on metadata in the document.
        - **Printing Allowed**
            - **Low resolution (150 dpi)** - Allows users to print at no higher than 150 DPI resolution. Printing can be slower because each page is printed as a bitmap image.
                - **High resolution** - Allows users to print at any resolution.
        - **Changes Allowed**
            - **Inserting, Deleting, and Rotating Pages** - Allows users to insert, delete, and rotate pages, as well as create bookmarks and thumbnails.
            - **Filling In Form Fields and Signing Existing Signature Fields** - Allows users to fill in forms and add digital signatures. This option does not allow them to add comments or create form fields.
            - **Commenting, Filling In Form Fields, and Signing Existing Signature Fields** - Allows users to add comments and digital signatures, and fill in forms. This option does not allow users to move page objects or create form fields.
            - **Any Except Extracting Pages** - Allows users to edit the document, create and fill in form fields, and add comments and digital signatures.
        - **Enable Copying of Text, Images, and Other Content** - Allows users to select and copy the contents of a PDF.
        - **Enable Text Access For Screen Reader Devices For The Visually Impaired** - Allows visually impaired users to read the document with screen readers, but does not allow users to copy or extract the contents.

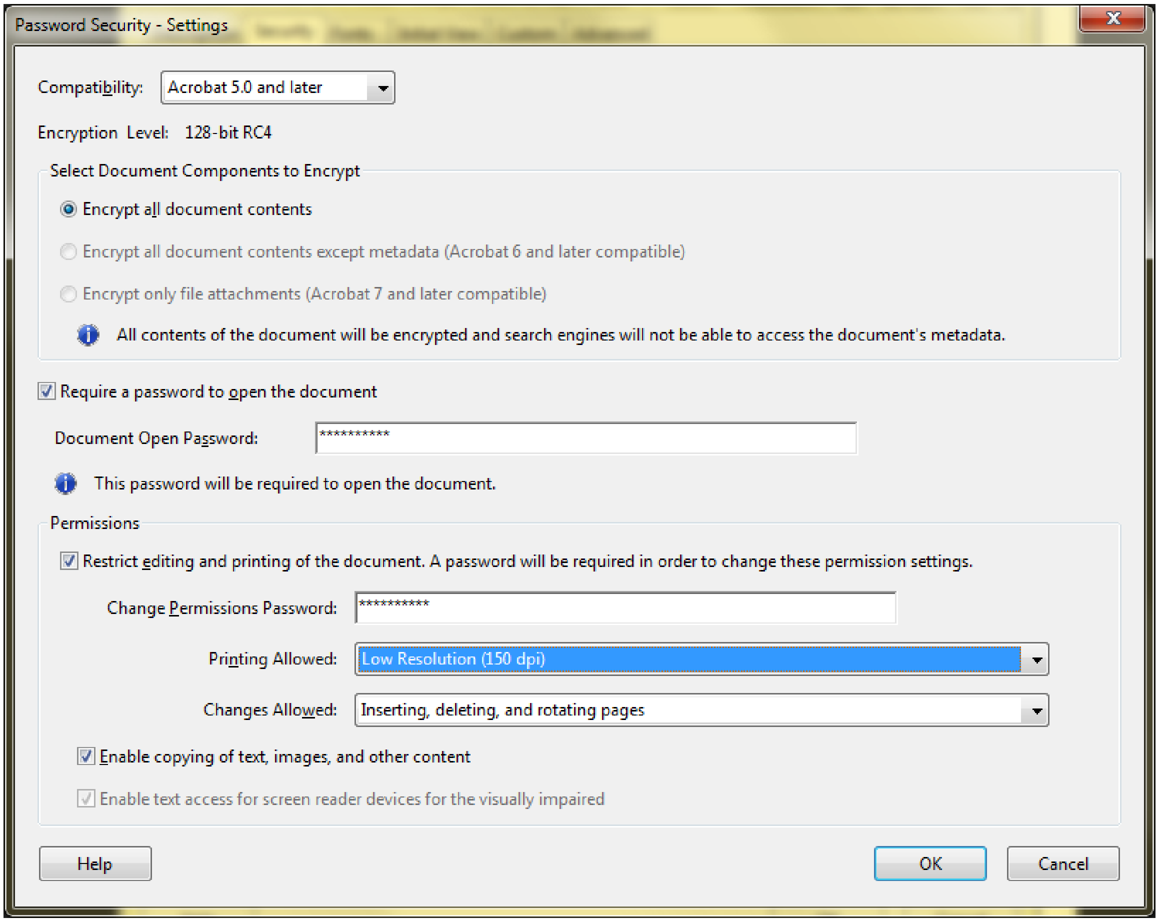
    For example, if you specify that no printing is allowed and the permissions password is ‘abcdefg,’ a user would have to do the following to print that document in Adobe Acrobat:

    1. Open up the PDF in Adobe Acrobat.
    2. Choose **Properties** from the **File** menu.
    3. Click on the **Securities** tab.

4. Click on the **Change Settings** button. A password prompt message box would appear, as follows:



5. Type “abcdefg” in the **Enter Password** field; then click the **OK** button. The following screen would appear:



6. From the **Printing Allowed** drop-down list, select either **Low Resolution** or **High Resolution**; then select the **OK** button when you are done.

Note: These settings are not editable in Adobe Reader.

Forms

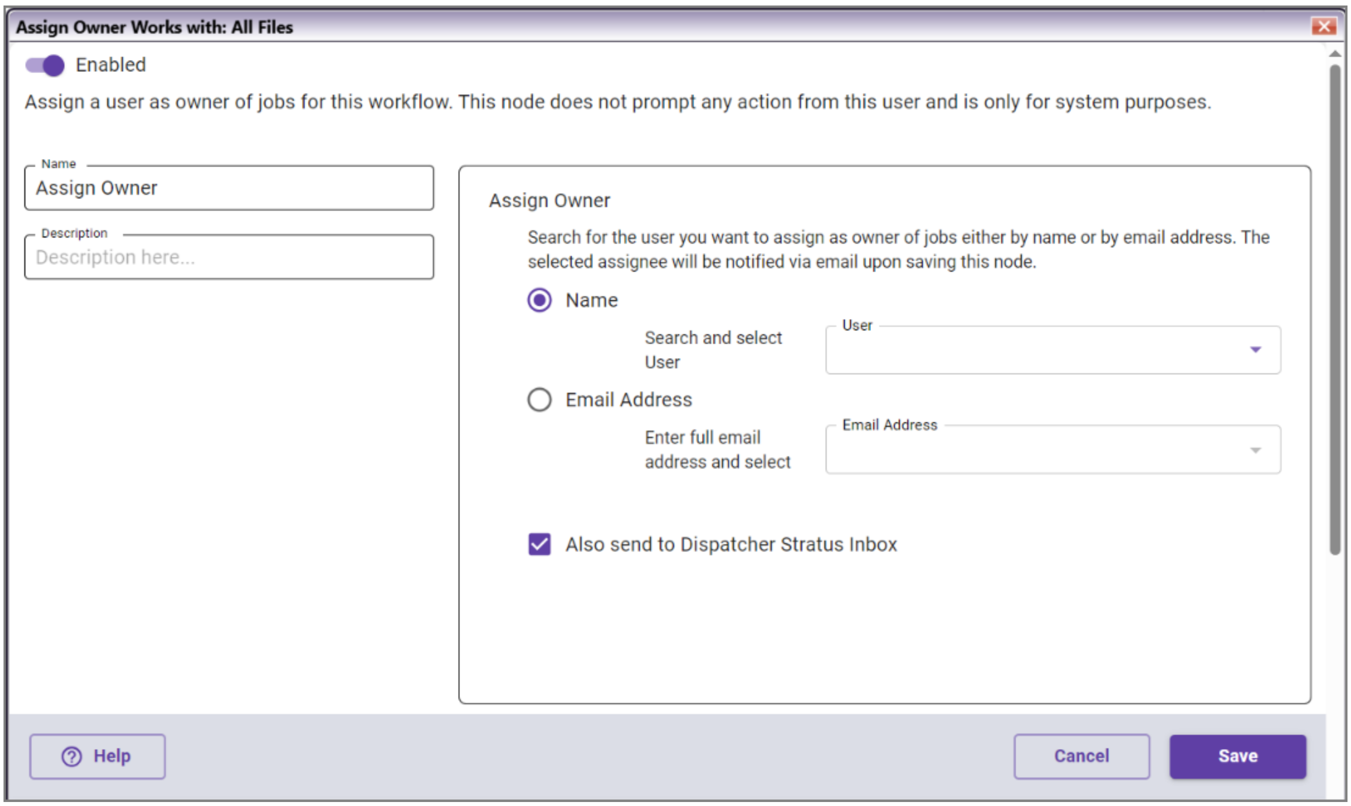
Assign Owner

The **Assign Owner** node is used to assign an owner to a job. The Assign Owner node's main purpose is to associate a user's information with an incoming job. This is particularly important for anonymous form submissions, as without any associated user information, these anonymous form submissions cannot be distributed to third-party applications such as Dropbox.

Important! When an **External Form** node or an **Internal Form** node is configured with Anonymous Submission and is followed by a process automation node (not a People node) or a Distribution node, you must insert an Assign Owner node before the process automation or Distribution node for the workflow to function as intended.

To open the Assign Owner node's configuration window, add a Process node for the Assign Owner to your workflow and double-click on it.

Configuring the Assign Owner



- **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.

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 Assign Owner Node

The Assign Owner node includes two ways to add an assignee: a user search feature and a field to enter an email address. To use the user search feature, do the following:

1. In the field available, enter your search term.
2. After a moment, the search results for the search term will appear. Click on the user you would like to be the owner of the job.
3. Click the Save button to save the configuration and close the node.

To use the email address field, do the following:

1. Click the Email Address option.
2. Type in the entire email address of the assignee. If you have already entered any emails, they are available by selecting the drop-down email.

Note: You must enter the entire email address of the assignee; partial emails will not yield results.

3. Click the Save button to save the configuration and close the node.

You also have the option to send a notification to the user in their Dispatcher Stratus Inbox. This option is selected by default.

The user will receive an email indicating their new status as assignee.

Notes:

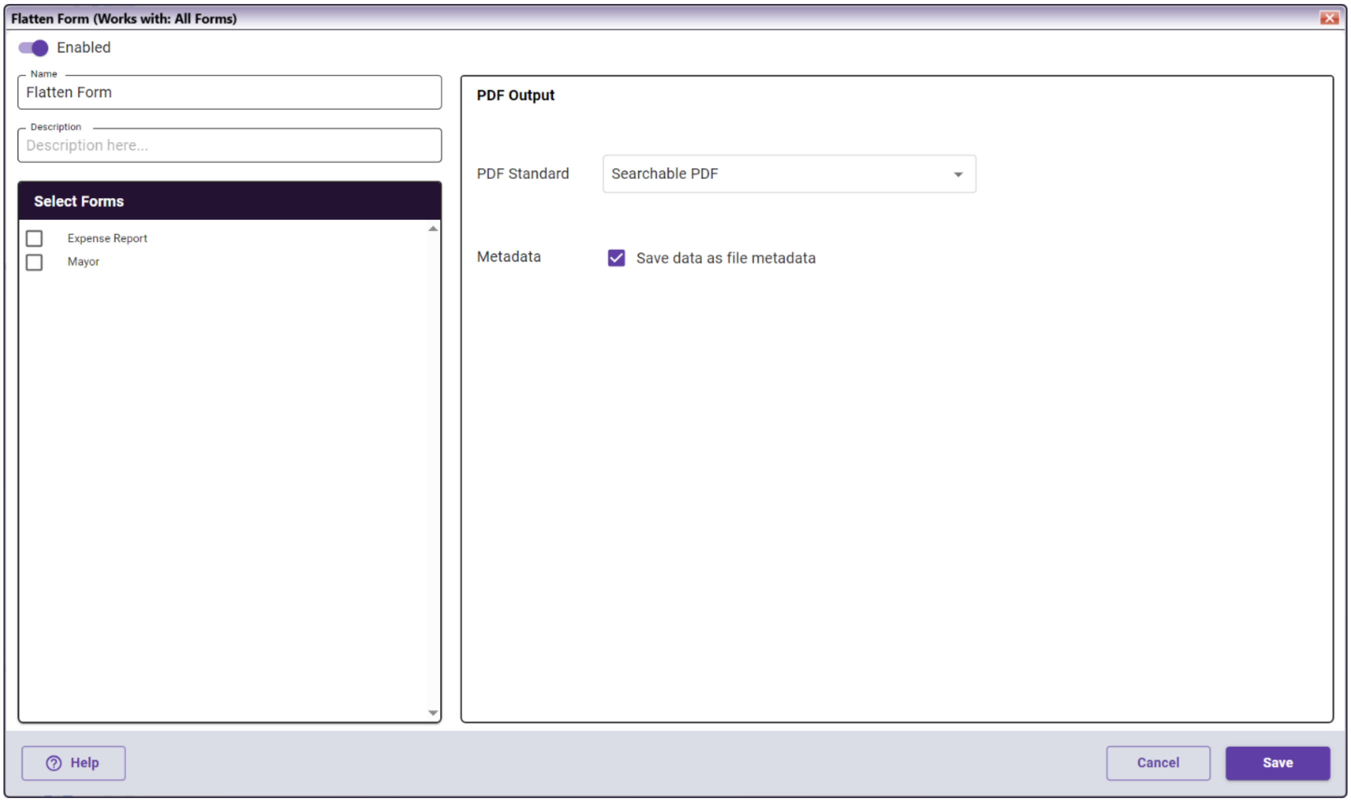
- A selected user gets an email and/or notification when the node configuration and workflow are saved. If you open the node, an option will appear to “Send Email” to send another notification to the assignee.
- The user who takes ownership of jobs in the workflow does not need to take any particular actions simply because they are assignees; actions may be necessary based on the configuration of any **People Nodes**.

Flatten Form

The **Flatten Form** node is used to save the data gathered from a form into a digital document, where it can be modified by other nodes. This allows form submissions to be treated as documents, so they can be processed and distributed to a final destination.

To open the Flatten Form node’s configuration window, add the node to your workflow and double-click on it.

Configuring the Flatten Form 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, 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.

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 Flatten Form Node

In order to configure the Flatten Form node, you must first have at least one configured **External Form** or **Internal Form** node in the workflow. To configure the Flatten Form node, do the following:

1. Available forms appear in the area on the left. Select the form whose submissions you would like to save as a document.
2. Select the file type you would like to save the information as. Options include:
    - Searchable PDF
3. Select whether you would like the “Save data as file metadata”. Selecting this option associates all of the form metadata with the newly-created document.
4. Select the **Save** button to save the configuration.

Any form submissions that match the configuration for the node will now be saved as a document.

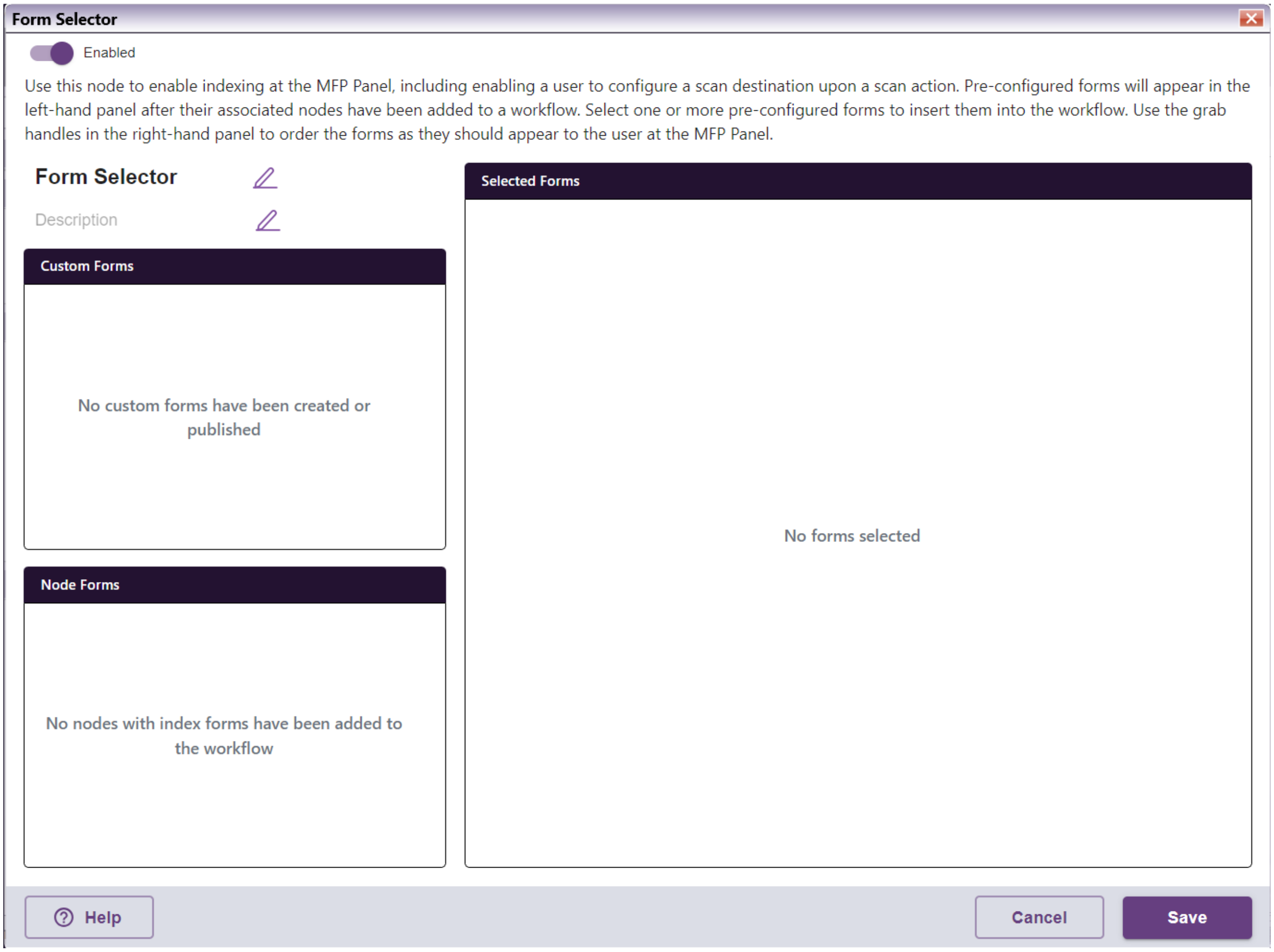
Form Selector

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, with a few exceptions noted below.

When combined with one of the **People Nodes**, you can enter data into the form from within Dispatcher Stratus.

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.

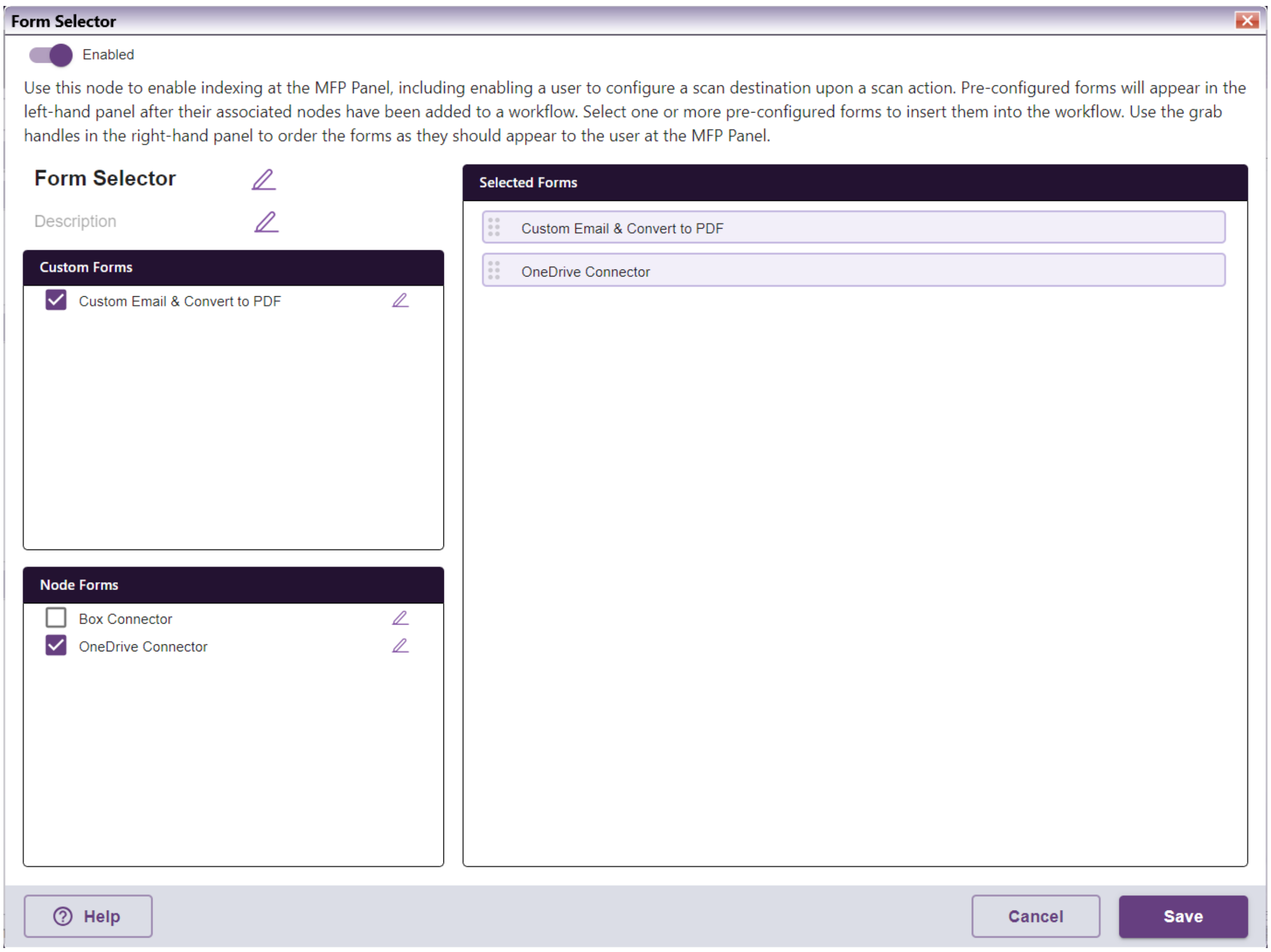
Buttons

- **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.

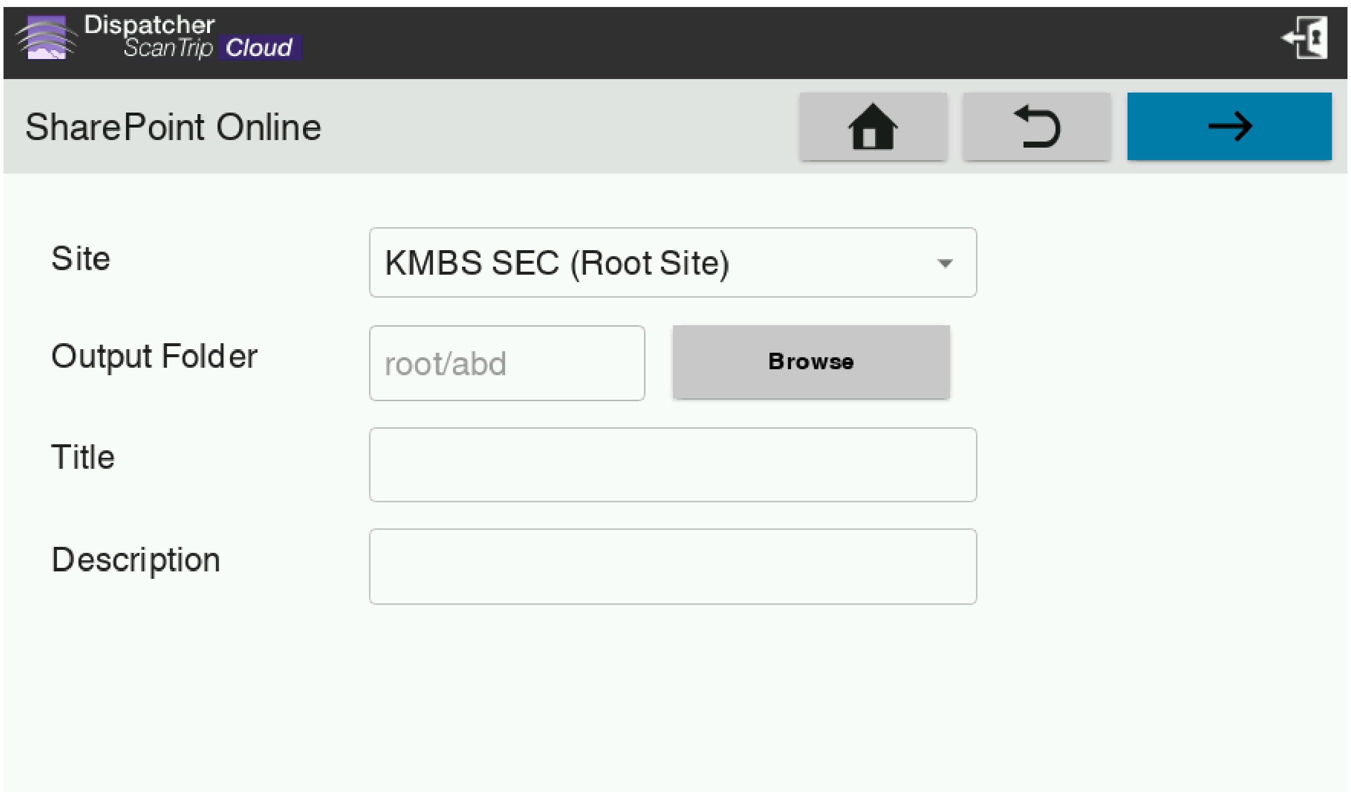
Important!

- A Form Selector node cannot be used immediately after an **External Form** node.
- A Form Selector node cannot be used immediately after an **Internal Form** node.

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

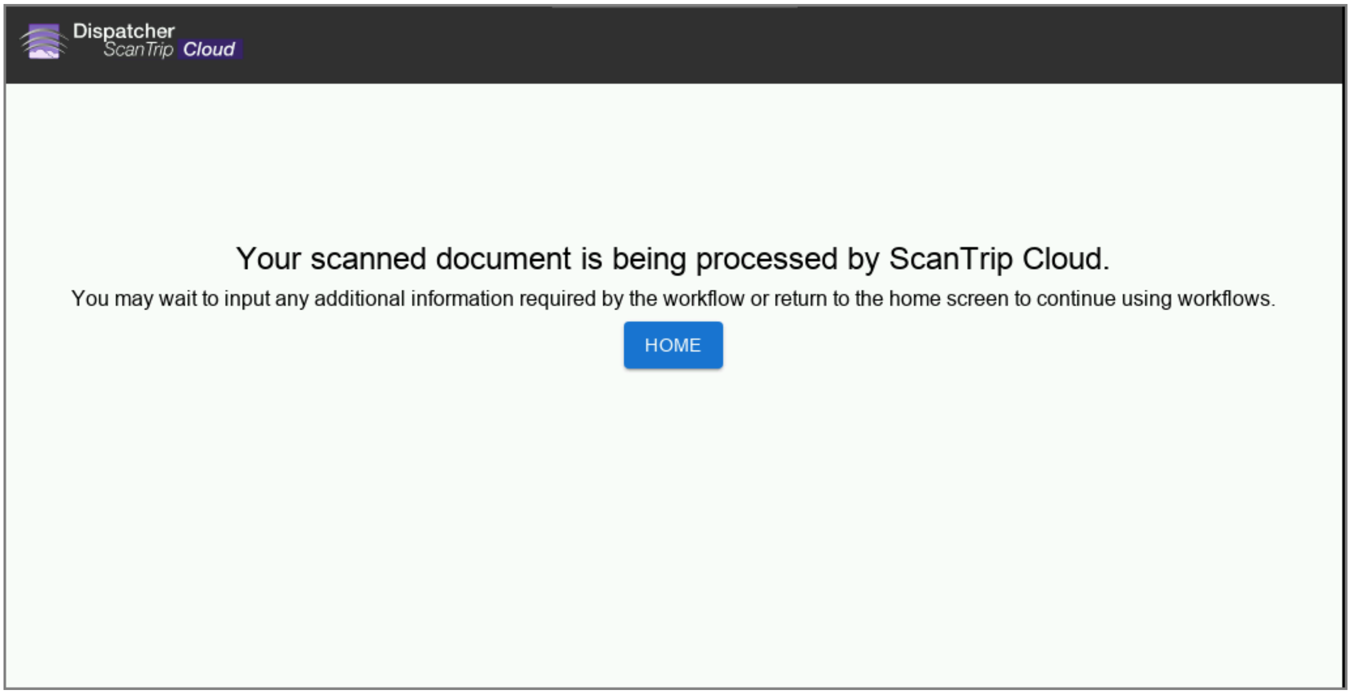


There are several buttons at the top of the screen, including:

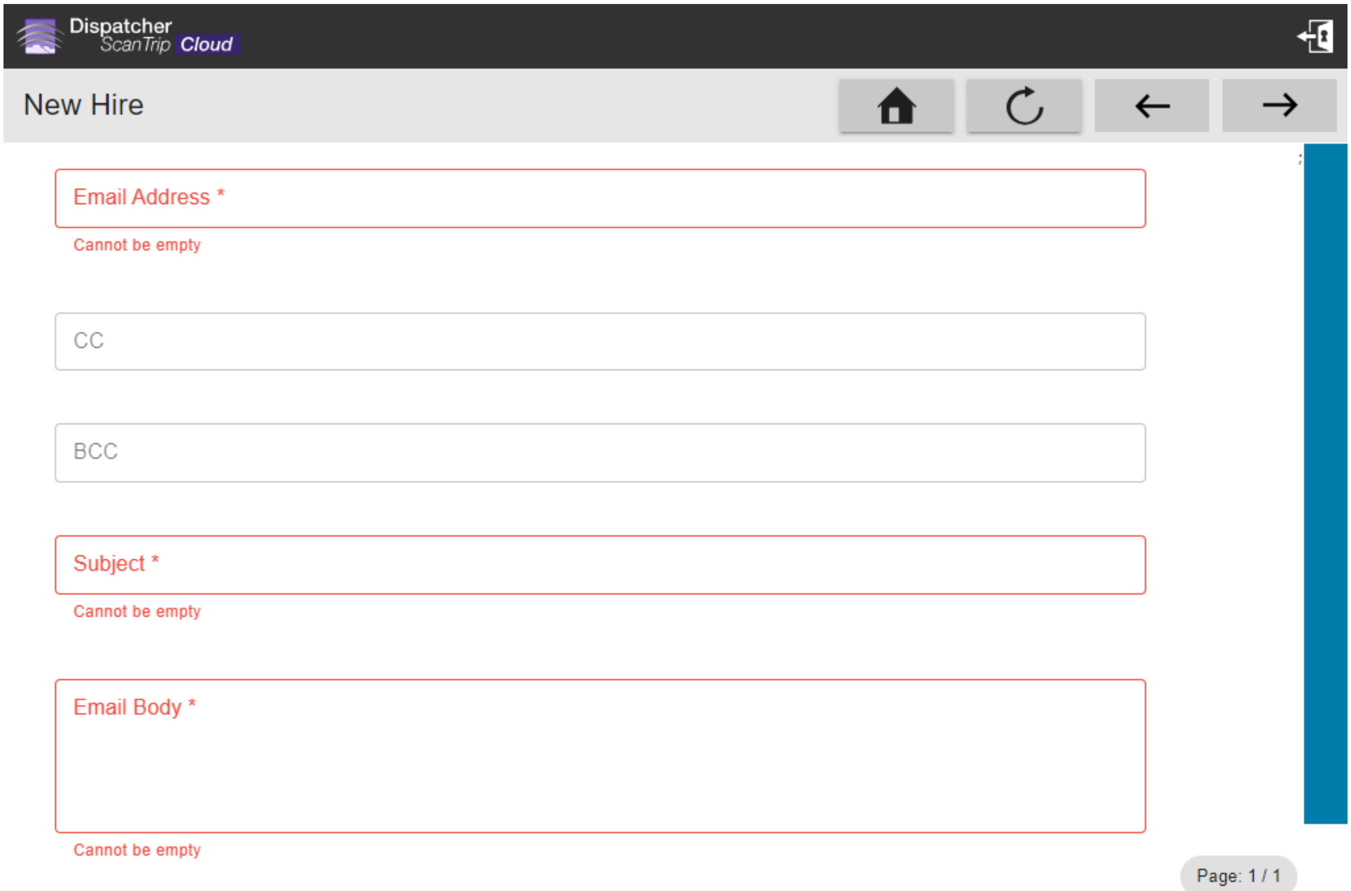
- Home - Leave the current workflow and return to the Home page.
- Back - Return to the account selection page.
- Forward - Move to the next form page. This button will turn blue when a form is able to be submitted.

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.

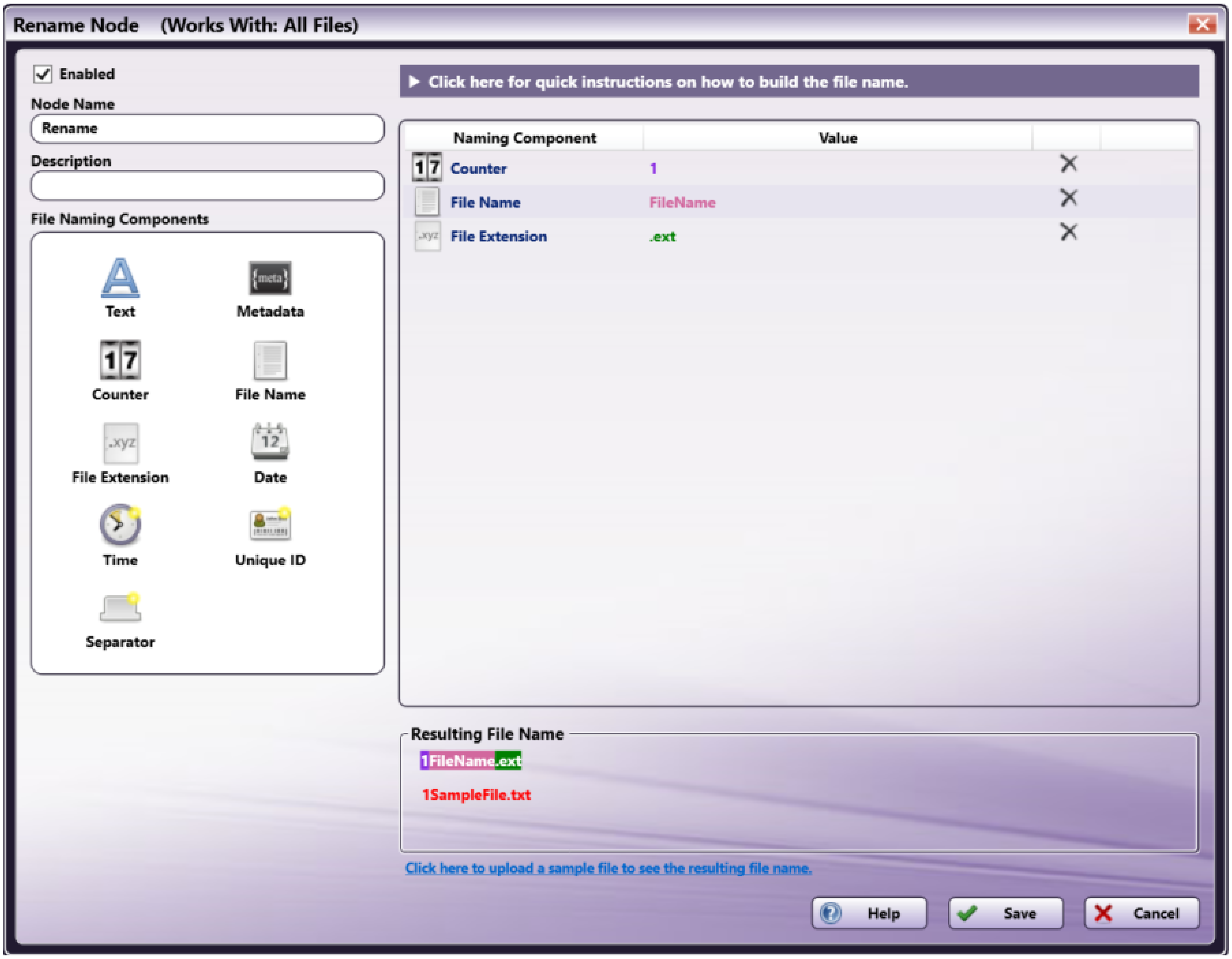
Forms within People Nodes

The Form Selector allows for forms to be accessible from within a **Job**. Forms are displayed in the same order as they are arranged in the Form Selector node.

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.
- **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.

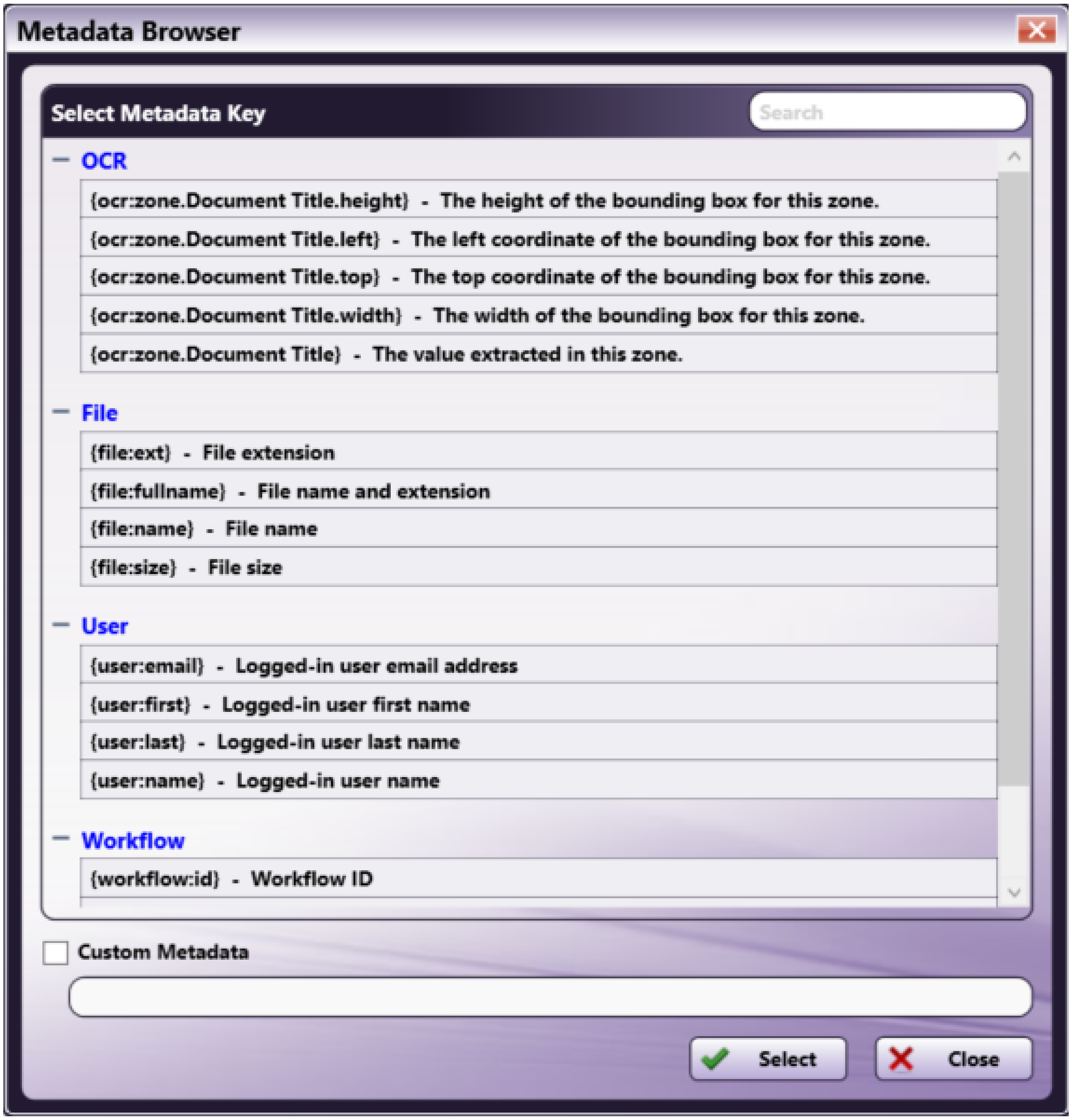
Metadata Processing

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 Stratus . 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 Stratus 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}
```

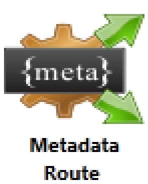
Job History and Notes Metadata

For workflows that include any of the **People Nodes**, the Metadata Browser will also display **Job History** and **Job Notes** metadata, using the following syntax:

```
{history[0].event}
{history[1].event}
```

```
{notes[0].note}
{notes[1].note}
```

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.

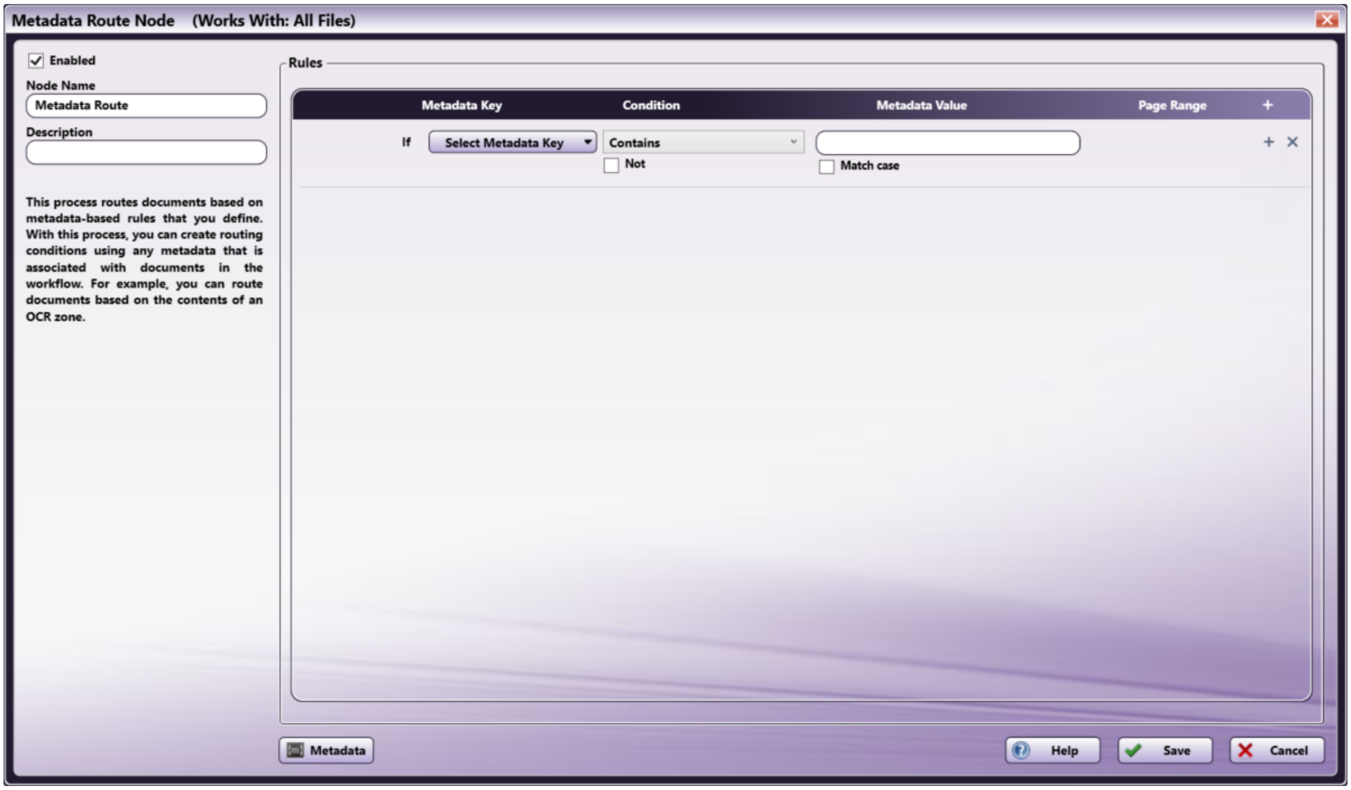
This node can have the following outbound connectors:

- **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

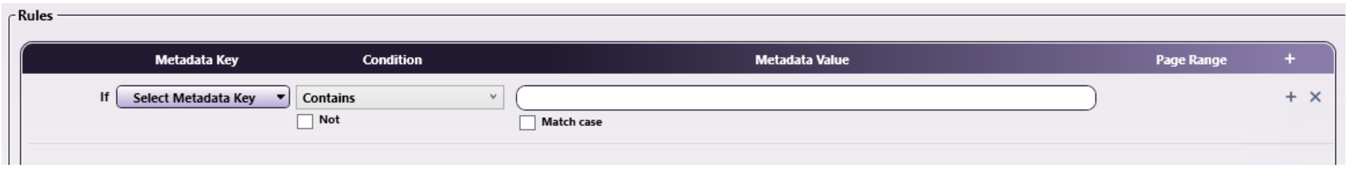


- **Enabled** - To enable this node in the current workflow, check the box at this field. If you leave the box blank, the workflow ignores the node and documents pass through as if the node was not present. Note that a disabled node does not check for logic or error conditions.
- **Node Name** - The 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.

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

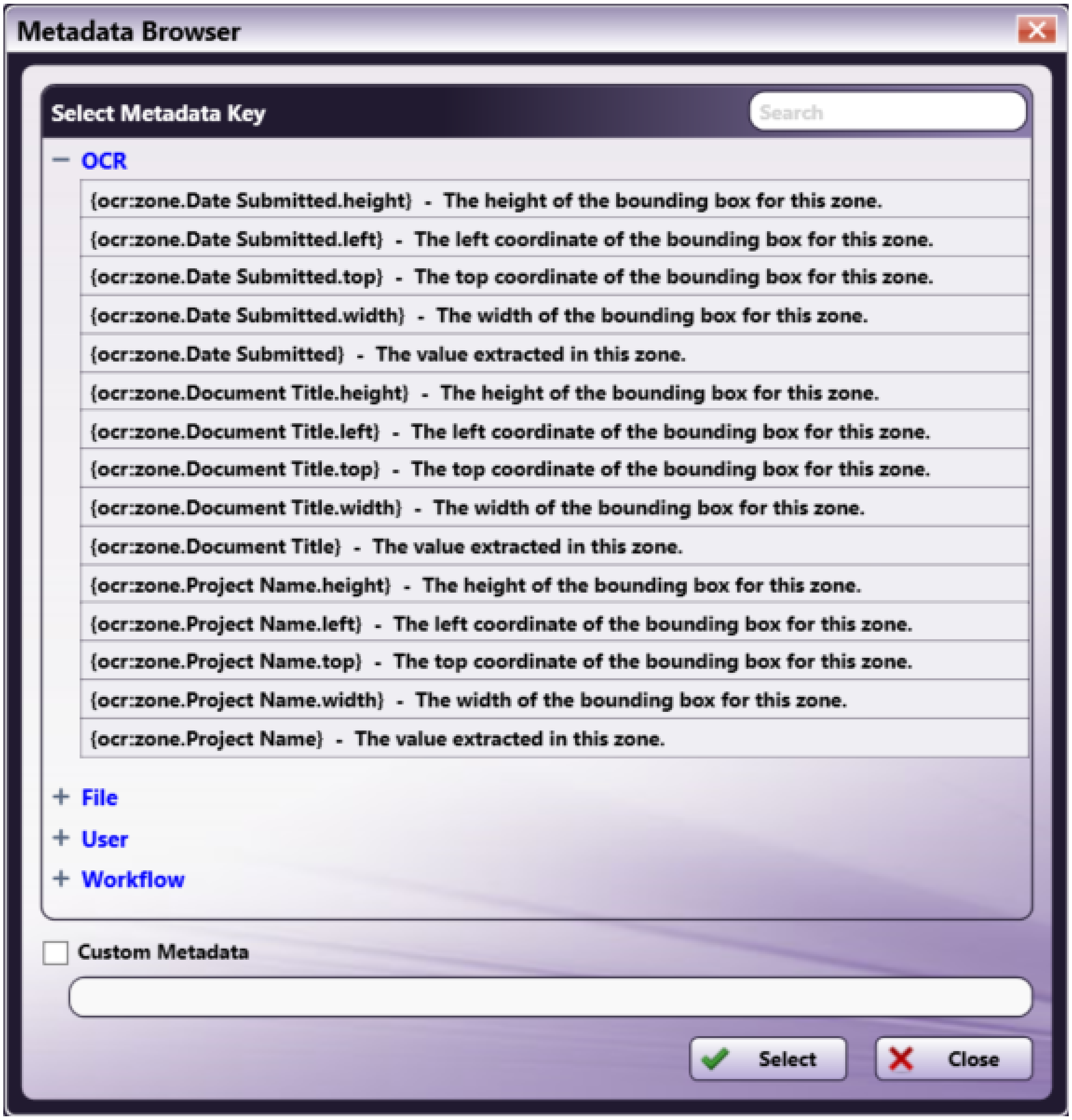


To set up a metadata rule, do the following:

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

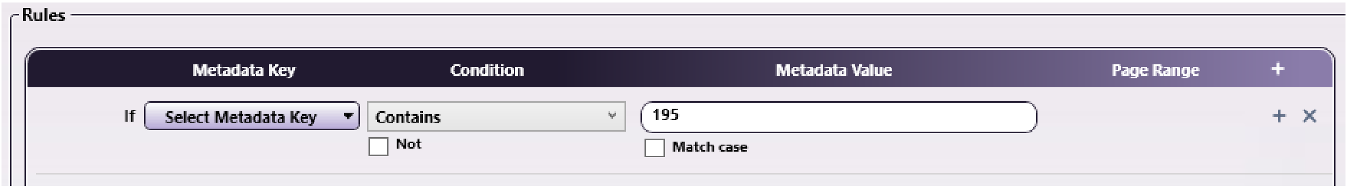
Next, do the following:

- 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:

- 21.0000000000000001 (17 significant digits) will round to 21.00000000000000 (16 significant digits)
- 21.0000000000000009 (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

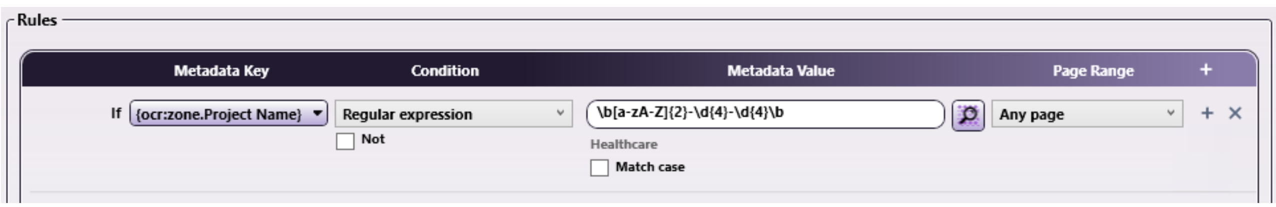
If you choose the **Regular expression** condition, you can use the **Pattern Matching Tool** to define your regular expression. More information about Regular expressions can be found on **this reference page**.

Note: For more information about using the Pattern Matching Tool, see the **Pattern Matching Tool** section below.

Do the following:

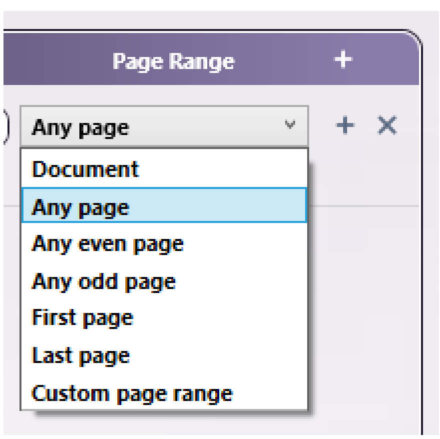
1. Choose **Regular expression** as a **Condition**. A Browse Patterns button will appear next to the Metadata Value field, as in the following illustration:

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:

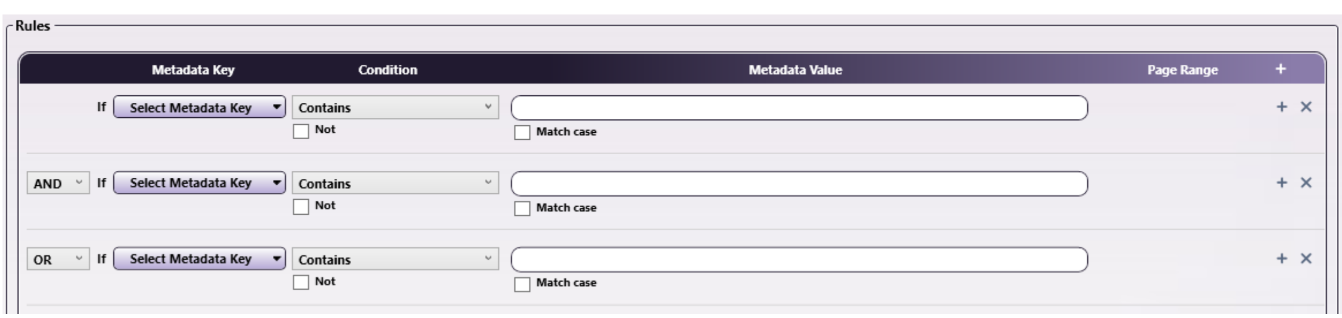
      `end(-5)-end`

  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.

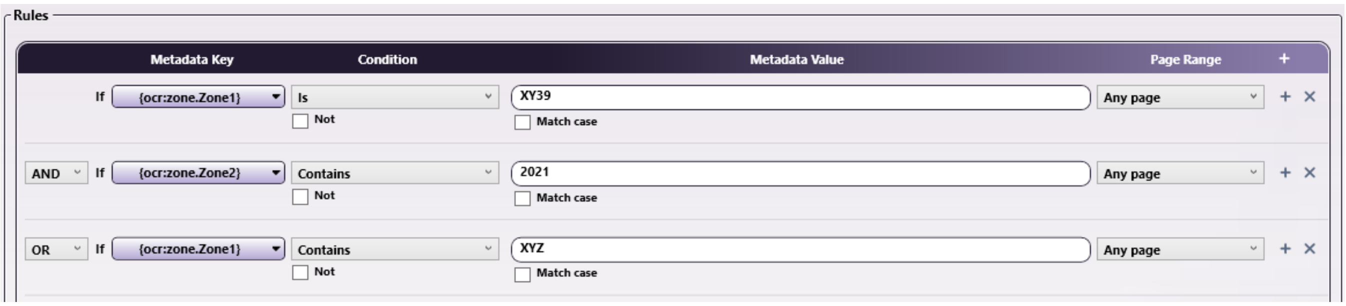
  ▶ Click here for more examples

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:

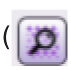


Note: When using multiple rules, the node processes **AND** rules before processing **OR** rules. Any rule with **AND** selected will combine with the row above to form a single validation event. For example, in the following illustration, the node will check to see if the metadata for zone 1 is “XY39” 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.

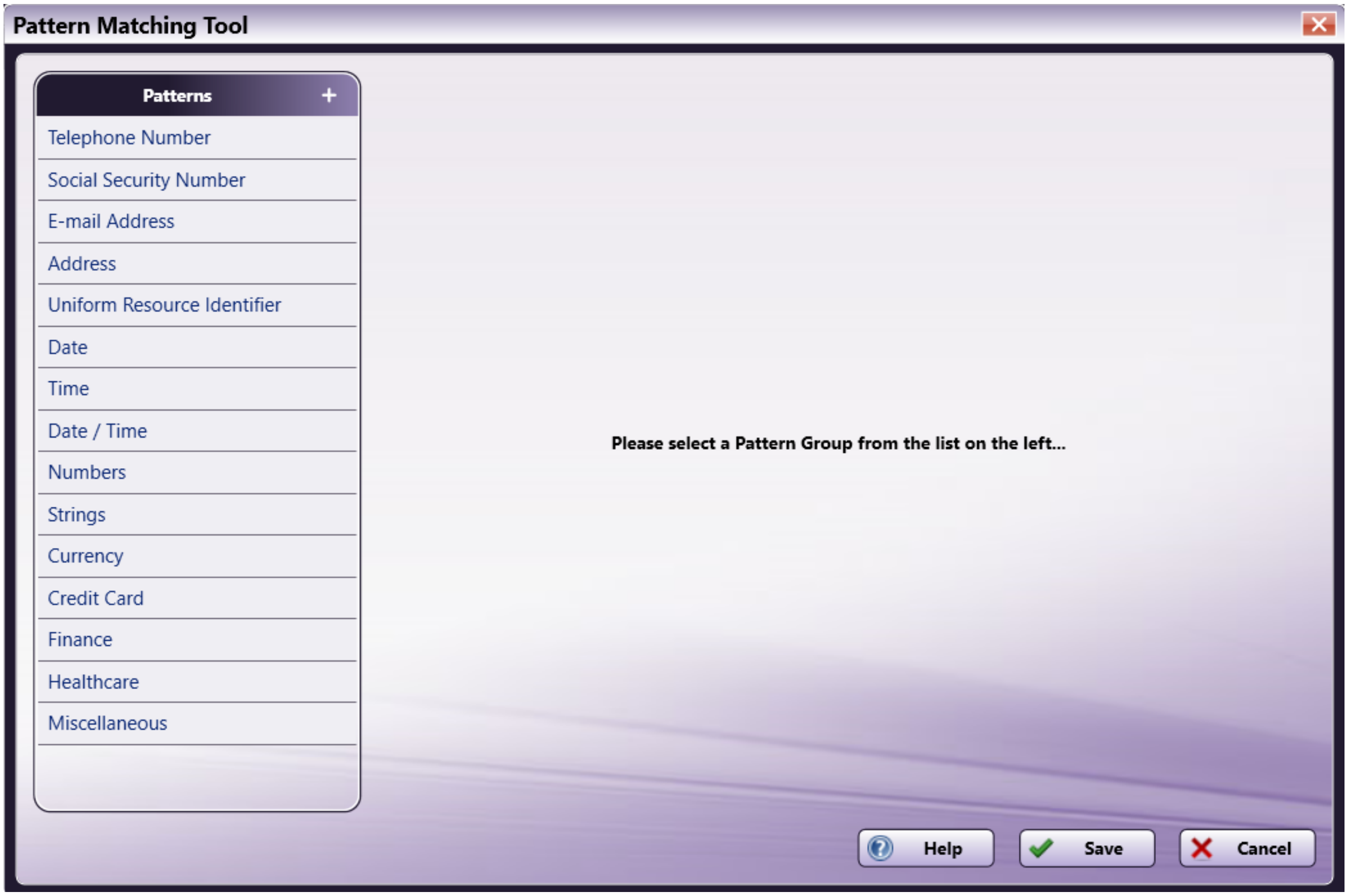


Pattern Matching Tool

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:

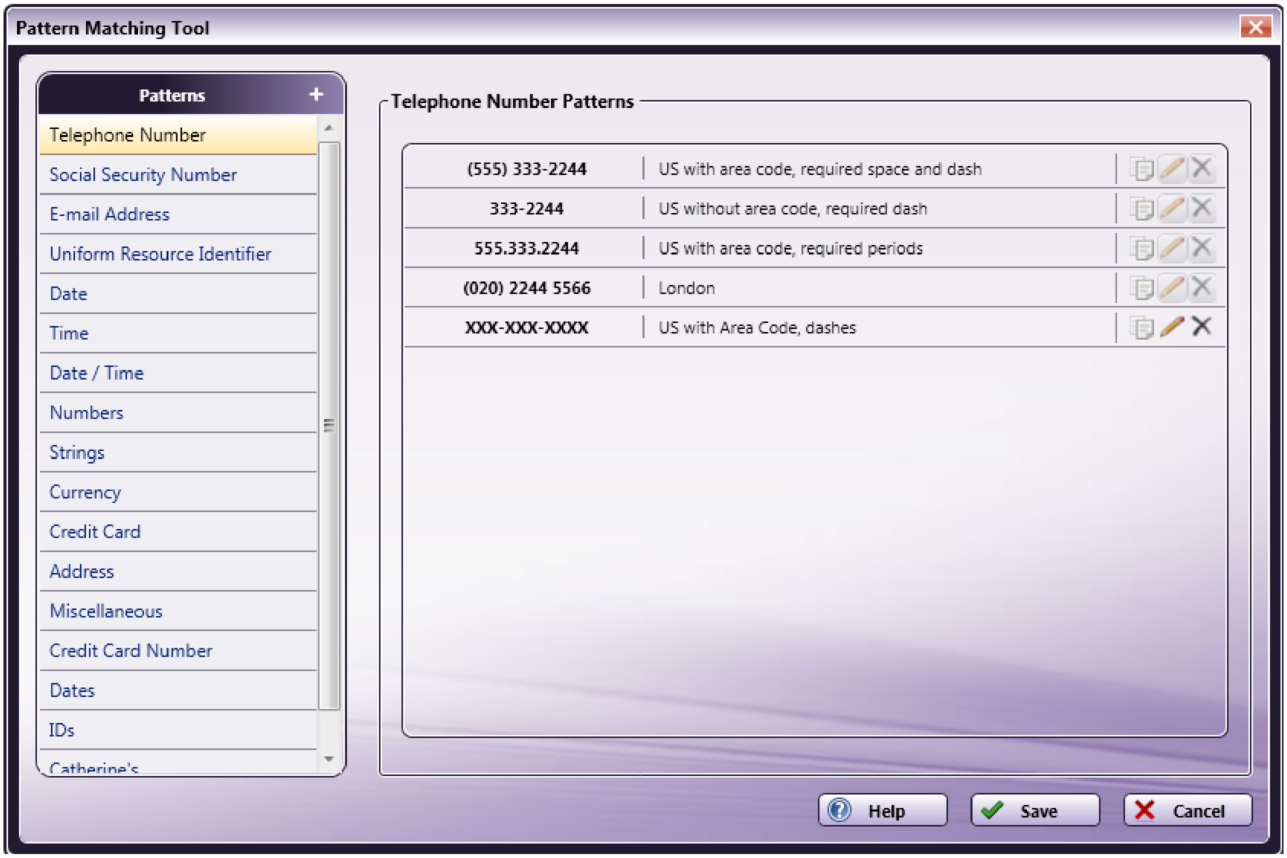
1. Choose **Regular expression** from the **Condition** drop-down list.
2. Select the **Browse Patterns** button ()that appears in the Metadata Value field area.

The Pattern Matching Tool opens, as in the following illustration:

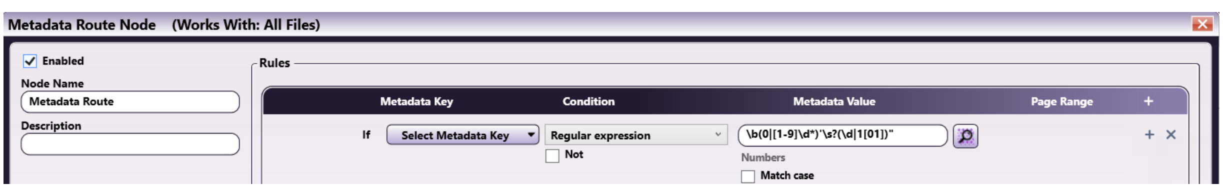


On the Pattern Matching Tool, groups of predefined patterns are listed in the Patterns area on the left-hand side of the window. You can do the following:

- 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:

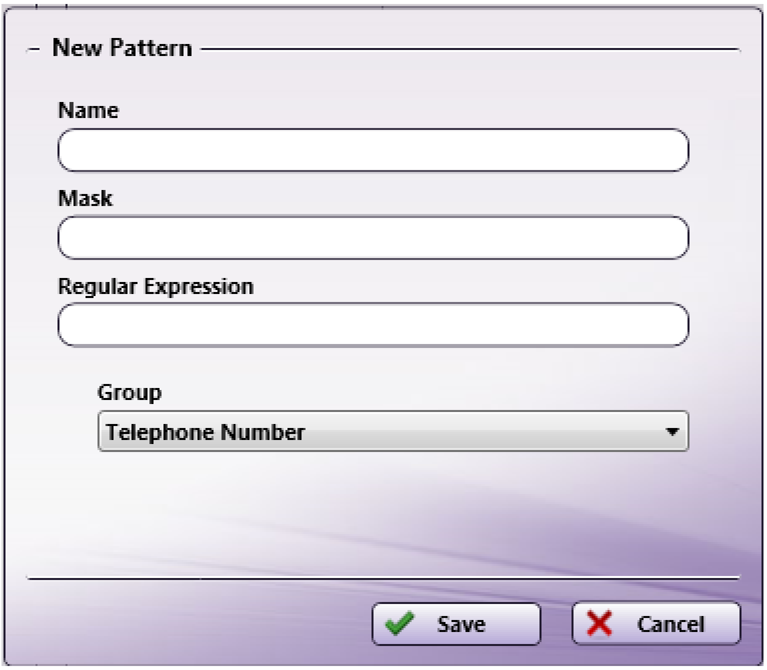


- To add a pattern to the Metadata Route node, do the following:
    - Select a category from the **Patterns** list in the Pattern Matching Tool.
    - Select the pattern that you are interested in.
    - Select the **Save** button.
    - The Pattern Matching Tool will close and the regular expression associated with the pattern will appear in the Metadata Route node's **Metadata Value** field, as in the following illustration:



Creating a New Pattern

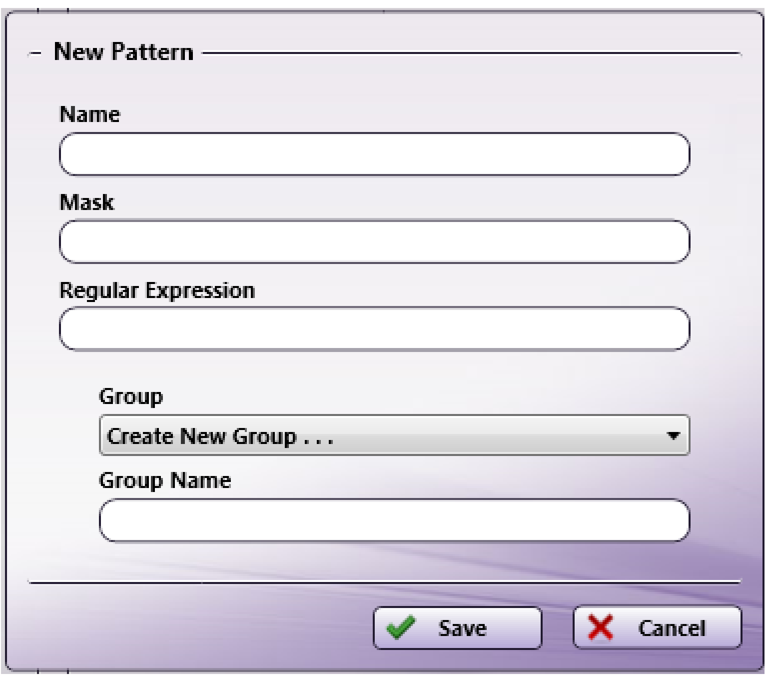
To create a new pattern, click on the + button in the Patterns area. The New Pattern window will appear, as in the following illustration:



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:

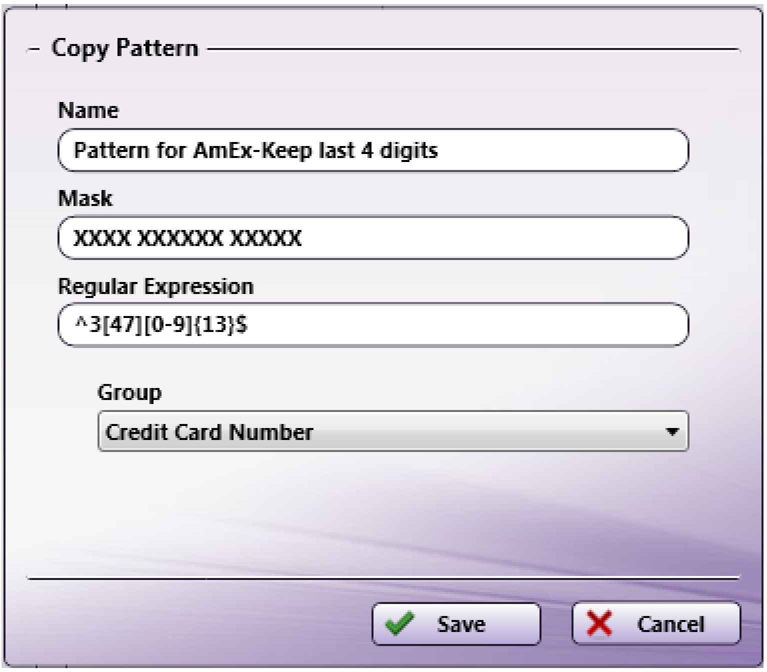
1. Click the **Add New Pattern** icon to open the New Pattern window.
2. Choose Telephone Number from the **Group** drop-down list.
3. Enter a name for the new pattern in the **Name** field.
4. Enter 1-XXX-XXX-XXXX in the **Mask** field
5. Enter 1-\d{3}-\d{3}-\d{4} in the **Regular expression** field.
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

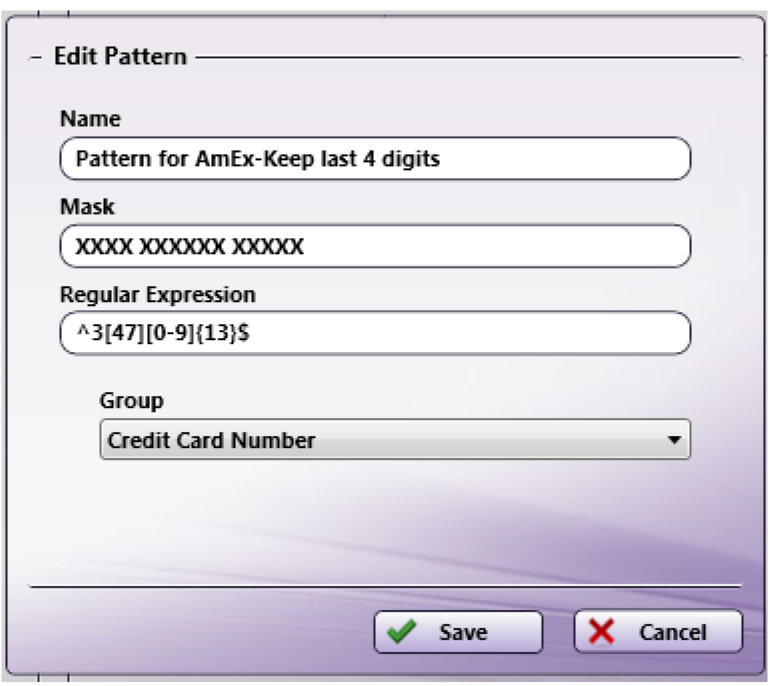
To copy patterns, click on the **Copy Pattern** icon next to the pattern you are interested in copying. The Copy Pattern window will appear, as in the following illustration:



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

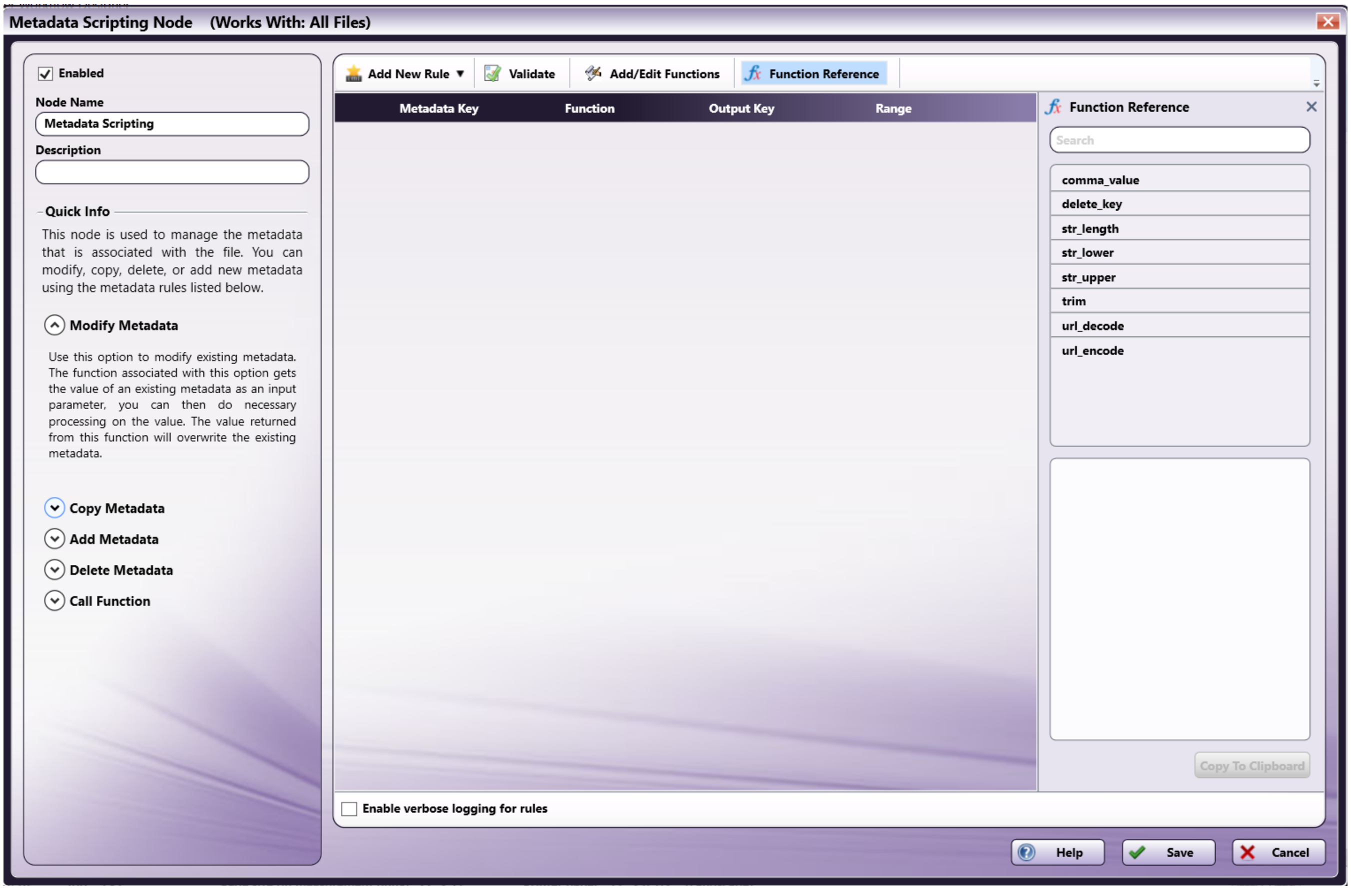
To delete a pattern that you have created, click on the **Delete Pattern** icon next to the pattern you are interested in removing. A message will appear, asking you to confirm the delete operation.

Metadata Scripting

The Metadata Scripting node is an advanced process used to manage metadata associated with files in the workflow. With this node, you can modify, copy, or delete metadata captured from files in the workflow. For example, you can create a rule to remove trailing spaces from metadata. You can also add new metadata.

A metadata script consists of one or more rules you create to manipulate metadata in a workflow. For each rule, you define the type (for example, Modify Metadata or Copy Metadata), then select the metadata key to which you want to apply the rule. You then configure the rule to achieve your desired results. All this is done using the Metadata Rule Builder.

To apply metadata scripting to metadata in a workflow, add a Metadata Scripting process node to the workflow and double-click on it. The Node Configuration window appears:



Use the controls in the upper-left corner of the Node Configuration window to name and enable the 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.

Buttons

- **Help** - To access Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.

Metadata Rule Builder

Use the Metadata Rule Builder area to create your metadata rules. Do the following:

1. **Enable verbose logging for rules** - To include more verbose logging messages in the Activity Log for debugging scripts, select this box. Otherwise, clear the box. This box appears below the Metadata Rule Builder area.

2. **Add New Rule** - Select **Add New Rule** on the toolbar, and then select one of the following rule types from the drop-down menu that appears:

    - **Modify Metadata** - Modify existing metadata.

    - **Copy Metadata** - Copy existing metadata to a new metadata key.

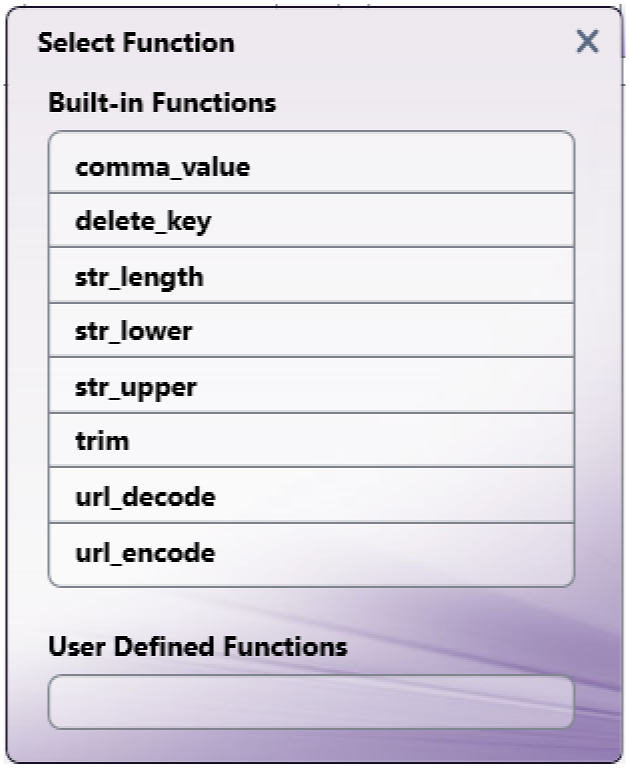
    - **Add Metadata** - Create new metadata. The value returned will be assigned to the new metadata key that you define in the Output Key field.

    - **Delete Metadata** - Delete a selected metadata key.

    - **Call Function** – Perform a function on existing metadata and store the value for use in other function calls.

3. **Select Metadata** - To choose the metadata key to which to apply the rule, select the Ellipsis button in the Metadata Key column. The **Metadata Browser** appears, from which you can choose the metadata key.

4. **Define Function** - To define the function to apply to the rule, select the drop-down menu in the **Function** column. The Select Function window appears. You can select one of the built-in functions, or select a custom function (if any) from the User Defined Functions field. See the following illustration:



To create your own function, select the **Add/Edit Functions** button on the top toolbar to open the Lua Script Editor.

Note: The Delete Metadata option does not require that a function be defined for it.

5. **Specify an Output Key** – To define a new metadata key for the value that will be returned from the function, use the **Output Key** column. The Output Key can contain any group name (for example, {myGroup:custom_zone}). Not all rules require an output key.

6. **Specify a Range** – To define a page and occurrence range for the metadata rule, use the **Range** column.

   For **Pages**, your options are:

   - Document – Process metadata found in the entire document.
   - All Pages – Process metadata found on every page.
   - All Even Pages – Process metadata found on all even pages.
   - All Odd Pages – Process metadata found on all odd pages.
   - First Page – Process metadata found on the first page only.
   - Last Page – Process metadata found on the last page only.
   - Custom Range - Process metadata in a custom page range. When you choose this option, an empty field appears in which you can enter the page range. Do the following:

- Specify a page range by using commas and/or dash signs counting from the start of the document. For example, to process pages 1, 2, 5, 6, and 7, enter:

  ```
  1, 2, 5-7
  ```

- Specify a specific processing sequence within a range of pages by using parentheses. For example, to process every third page from pages 1 to 10, enter:

  ```
  1-10(3)
  ```

- Specify the last page by using ‘end.’ For example, to process pages 15-20 of a 20-page document, enter

  ```
  end(-5) - end
  ```

Other examples include:

- To process pages 1, 2, 5, 6, 7, and 19 of a 20-page document, enter:

  ```
  1,2,5-7, end(-1)
  ```

- To process pages 10-15 of a 20-page document, enter:

  ```
  10-end(-5)
  ```

- To process every other page from pages 10-15 of a 20-page document, enter:

  ```
  10-end(-5)(2)
  ```

- To process pages 15-20 of a 25-page document, enter:

  ```
  end(-10)-end(-5)
  ```

- To process pages 10-20 of a 20-page document, enter:

  ```
  end(-10)-end
  ```

For **Occurrences**, your options are:

- All Occurrences – Process all occurrences of metadata found.
- All Even Occurrences – Process all even occurrences of metadata found.
- All Odd Occurrences – Process all odd occurrences of metadata found.
- First Occurrence – Process the first occurrence of metadata found.
- Last Occurrence – Process the last occurrence of metadata found.
- Custom Range – Process a custom occurrence number for metadata found. When you choose this option, an empty field appears in which you can enter a range. You can specify an occurrence range by using commas and/or dash signs counting from the start of the document. For example, to process metadata occurrences 1 and 2, enter:

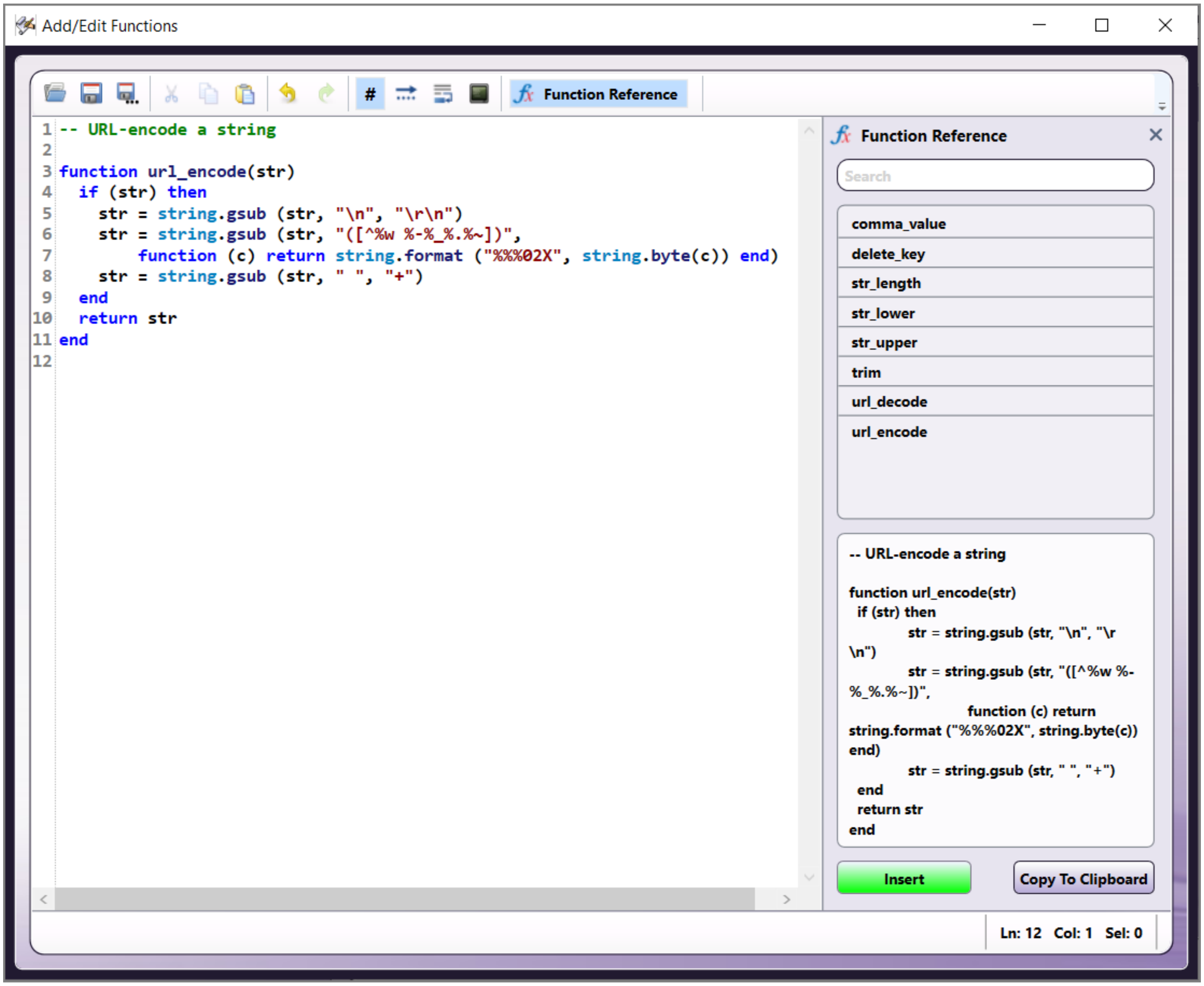
  1-2

7. **Validate** - To check your rules for errors, select the **Validate** button on the top toolbar. Any rules that do not validate successfully appear in a pop up window along with an error message

to help you fix the issues. Run the Validate process until no error messages appear.

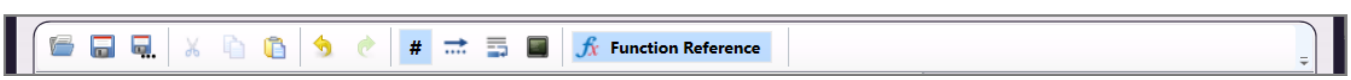
Adding/Editing Functions

The **Add/Edit Functions** button on the top toolbar provides access to a built-in Lua Script Text Editor you can use to create or edit unique Lua functions. The script editor supports full syntax highlighting for Lua scripting. It also provides the built-in function reference library that you can use to copy or insert into the text editor. See the following illustration for an example:



Script Editor Toolbar

The Lua Script Text Editor contains a toolbar with action icons to help you edit your function. See the following illustration:



The icons do the following, from left to right:

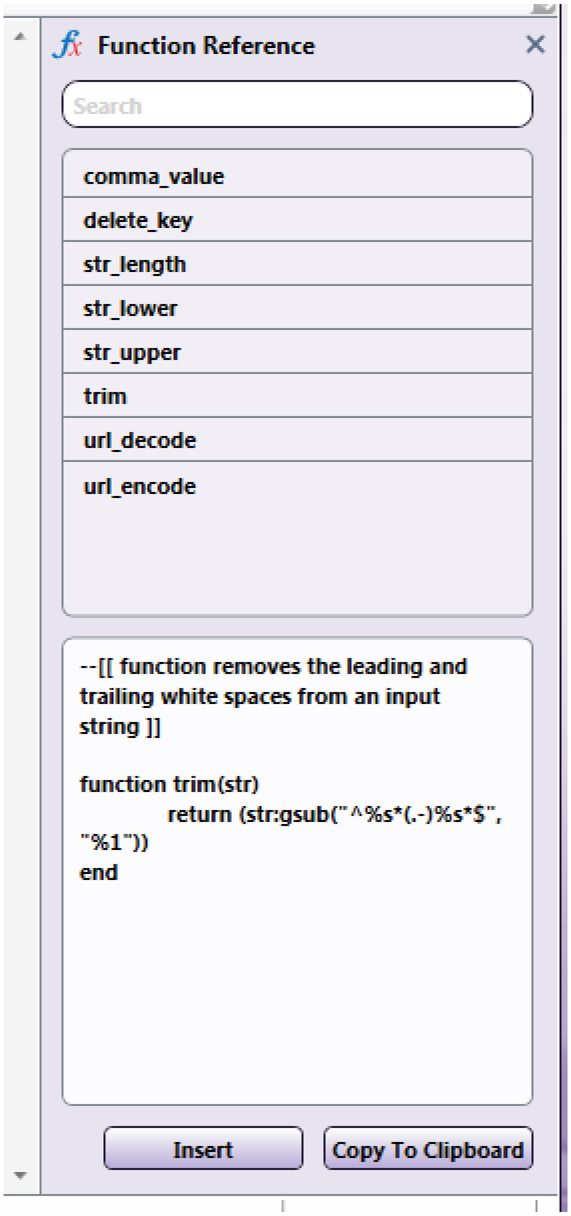
- Load contents of external Lua script into editor
- Save the contents of Lua script
- Export the Lua script into a new file
- Cut text
- Copy text
- Paste text
- Undo last action
- Redo last Undo
- Toggle line numbers
- Toggle white spaces/tabs
- Text wrap
- Toggle output / console
- Toggle built-in Function Library

Function Reference Library

The **Function Reference** option on the top toolbar provides access to the Function Reference Library, a panel listing built-in functions you can use in your rules and rule functions. Select **Function Reference** on the top toolbar to display the panel. Select it again to hide the panel. The Search option filters the list to display functions whose name matches a specified text string. If you select a function in the panel, a brief description of the function, as well as its definition, displays in the box below. Select **Copy to Clipboard** to copy the definition to the clipboard.

You can access the Function Reference Library in either of the following ways:

- **Metadata Rule Builder** - If you access this way, you can view information on a selected function and copy its definition to the clipboard. However, to add a function to a rule, you must use the Function column in the Metadata Rule Builder.
- **Lua Script Text Editor** - If you access this way, you can paste a selected function into a Lua script. Do the following:
    1. Select a function from the library. The function is displayed in the bottom area. In the following illustration, the “trim” function was selected:



2. To insert the function into the Lua script editor, select the **Insert** button. The function appears at the bottom of the script editor, as in the following illustration:

```lua


function get_name()
	return string.format("Hello %s END", trim(myData[1]))
end



--[[ function removes the leading and trailing white spaces from an input string ]]

function trim(str)
	return (str:gsub("^%s*(.-)%s*$", "%1"))
end

```

3. To copy the function to paste into the Lua script editor or another application, select the **Copy to Clipboard** button.

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:

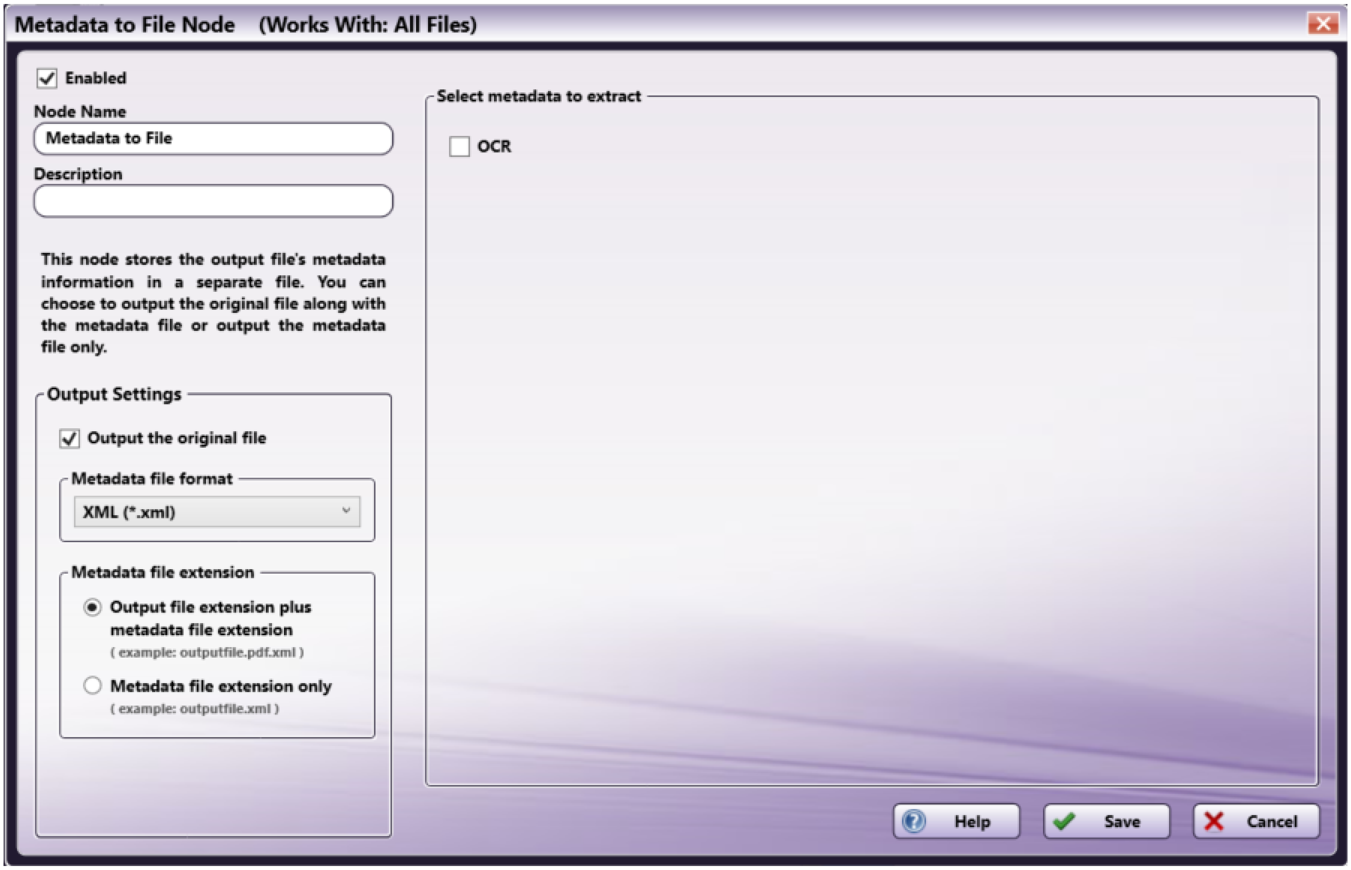
- Record keeping .
- Import into other systems for search purposes.

- 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.

- **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)
    - Custom - For more information, see the **Creating Custom Output Files** section below.
    - Custom (Batch) - This option allows for the creation of a single CSV file that contains all metadata from all processed documents in the batch.
- **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.

Options include:

- **Advanced OCR**

- **Annotate**
- **Collect from Dispatcher Phoenix** - (While this node does not generate any of its own metadata, the metadata will be available because of this node.)
- **Dropbox In**
- **External Form**
- **Forms**
- **Internal Form**
- **Job History**
- **Job Notes**
- **Microsoft Exchange In**
- **ODBC**
- **Upland InterFAX In**

Note: For more information about how to use metadata in other nodes, see **Metadata Browsing**.

Extracting Metadata Generated in Dispatcher Phoenix

The **Collect from Dispatcher Phoenix node can import metadata** from Dispatcher Phoenix workflows into Dispatcher Dispatcher Stratus . 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 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 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.

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%}
}
]
}
```

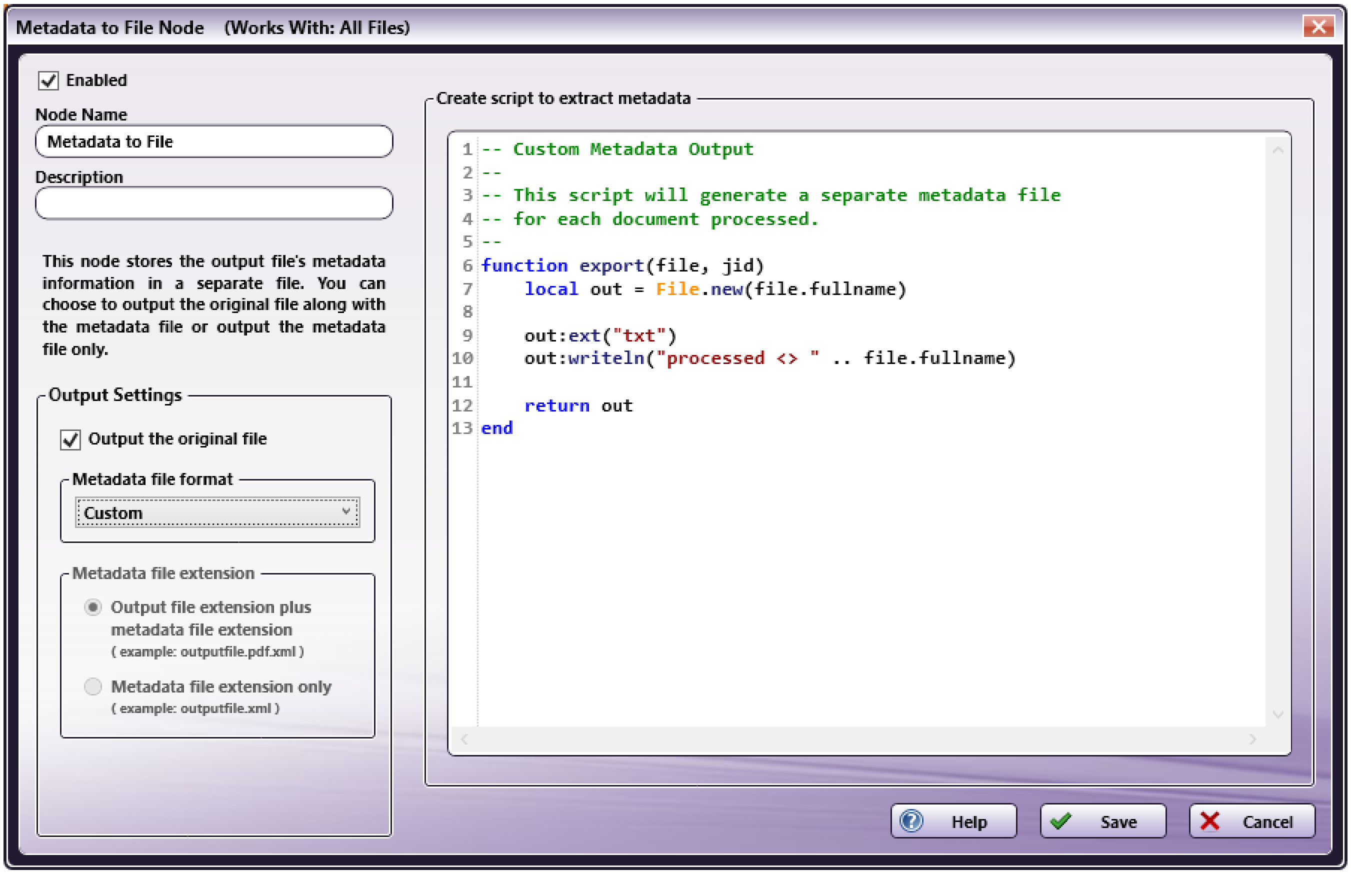
For example:


```
{
"name" : "pdf_form_maker1_new.pdf",
"size" : 58750,
"ctime" : 0,
"mtime" : 1427808953,
"meta" : [
{
"group" : "pdf",
"name" : "editable",
"values" : {
"doc" : "true"
}
}
]
}
```


Creating Custom Output Files

Dispatcher Stratus also gives you the option to create your own file format in which to store metadata. This is useful if you need to control the output of the file to fit your system, for example when the other standard formats such as XML will not work with the content management system or other application that you are working with.

To create a customized file format, choose the **Custom** option from the **Metadata file format** drop-down list. Once selected, the **Select metatdata to extract** box containing the various metadata types disappears and is replaced by the **Create script to extract metadata** box. This text box is pre-populated with syntax highlighting for Lua. You can use this very simple example to get started. See the following illustration:



Export Function

The Lua script must implement a function called “export” that accepts the following two arguments:

- file (representing the basic file information and accessor for file metadata)
- file.name
- file.ext
- file.fullname
- file.size
- file.mtime
- file.ctime
- file.{metadata group name} (i.e., pdf, bates, ocr, etc.)
- file.pdf.author
- file.pdf[‘author’]
- file.bates.Stamp1
- file.ocr[‘zone.MyZone’][1] = value of zone.MyZone on 1st page

- file.ocr[‘zone.MyZone’][2] = value of zone.MyZone on 2nd page

Note: If the metadata contains periods, it must be wrapped in brackets and quotes, like [“zone.MyZone”].

- jid (representing user information)
- jid.user
- export all {user:***} as variables
- Examples: jid.user.name, jid.user.domain, jid.user.email (if defined)
- jid.fs
- export all {fs:***} as variables
- Examples: jid.fs.DesktopDirectory, jid.fs.CommonApplicationData

The “Export” function should return an instance of ‘File.new()’ or ‘nil’. To create your output file, use the following syntax:

local out = File.new(“my filename here”)

OR

local out = File.new(file.fullname)

File Object Methods

Here are the file object methods that you can use:

- write(“some data”)
- writeln(“some data that has a newline appended to it”)
- ext(“change file extension”)
  - ext(“txt”)
  - ext(“xml”)
- eol(“change newline character”)
  - eol(“\n”)
  - eol(“\r\n”)

There is also a global function called ‘Print’ that can be used to log messages.

Example

In a workflow that extracts data from invoices, the following XML file is created:

invoice-2.jpg.xml

```
<file name="invoice-2.jpg" size="204769" ctime="0" mtime="1414511469">
    <meta group="ocr" name="zone.Date">
        <page number="1">3/19/2004</page>
    </meta>
    <meta group="ocr" name="zone.Name">
        <page number="1">John Doe</page>
    </meta>
    <meta group="ocr" name="zone.Number">
        <page number="1">100200 </page>
    </meta>
</file>
```

However, the format and content of this XML will not work with a customer's existing system. In this case, the following custom file was created:

invoice-2.bif - Notepad

File Edit Format View Help

```
[Documents File]
[documents]
document1=City_Of_Atlanta       C:\Users\Catherine\Desktop\output\ocr-forms\invoice-2.jpg
doc1.fields=User|First Name|Last Name
doc1.field1=John Doe
doc1.field2=John
doc1.field3=Doe
doc1.location=City_Of_Atlanta/Gas/2004/Mar
doc1.create_location=True
doc1.append=False
doc1.delete_images=True
```

The following custom script was used to create this custom file:

Create script to extract metadata

```
MONTHS = {}
MONTHS[1] = "Jan"
MONTHS[2] = "Feb"
MONTHS[3] = "Mar"
MONTHS[4] = "Apr"
MONTHS[5] = "May"
MONTHS[6] = "Jun"
MONTHS[7] = "Jul"
MONTHS[8] = "Aug"
MONTHS[9] = "Sep"
MONTHS[10] = "Oct"
MONTHS[11] = "Nov"
MONTHS[12] = "Dec"

function export(file, jid)
    local ocr = file.ocr
    local out = File.new(file.fullname)
    local names = string.split(tostring(ocr['zone.Name'][1]), " ")
    local fname = names[1]
    local lname = names[2]
    local pdate = string.split(tostring(ocr['zone.Date'][1]), "/")
    local year = pdate[3]
    local month = MONTHS[tonumber(pdate[1])]

    -- log some values
    print(tostring(ocr['zone.Name'][1]))
    print(tostring(ocr['zone.Date'][1]))
    print(tostring(ocr['zone.Number'][1]))

    -- set file extension
    out:ext("bif")

    out:writeln("[Documents File]")
    out:writeln("[documents]")

    -- Writes Document Line of BIF file, includes Document Type and Image File location
    out:writeln("document1=City_Of_Atlanta\t" .. tostring(jid.fs.DesktopDirectory) .. "\\output\\ocr-forms\\" .. file.fullname)

    -- Enter index names for ViewWise Document Type Specified, these are case sensitive
    -- and must match exactly as they exist in ViewWise.
    out:writeln("doc1.fields=User|First Name|Last Name")

    -- Enter index value variables from RRT's
    out:writeln("doc1.field1=" .. tostring(ocr['zone.Name'][1]))
    out:writeln("doc1.field2=" .. tostring(fname))
    out:writeln("doc1.field3=" .. tostring(lname))

    -- Writes out BIF file options as specified in beginning of this script
    out:writeln("doc1.location=City_Of_Atlanta/Gas/" .. year .. "/" .. month)
    out:writeln("doc1.create_location=True")
    out:writeln("doc1.append=False")
    out:writeln("doc1.delete_images=True")

    -- return File or `nil` to bypass
    return out
end
```

OCR

Advanced OCR

Advanced OCR

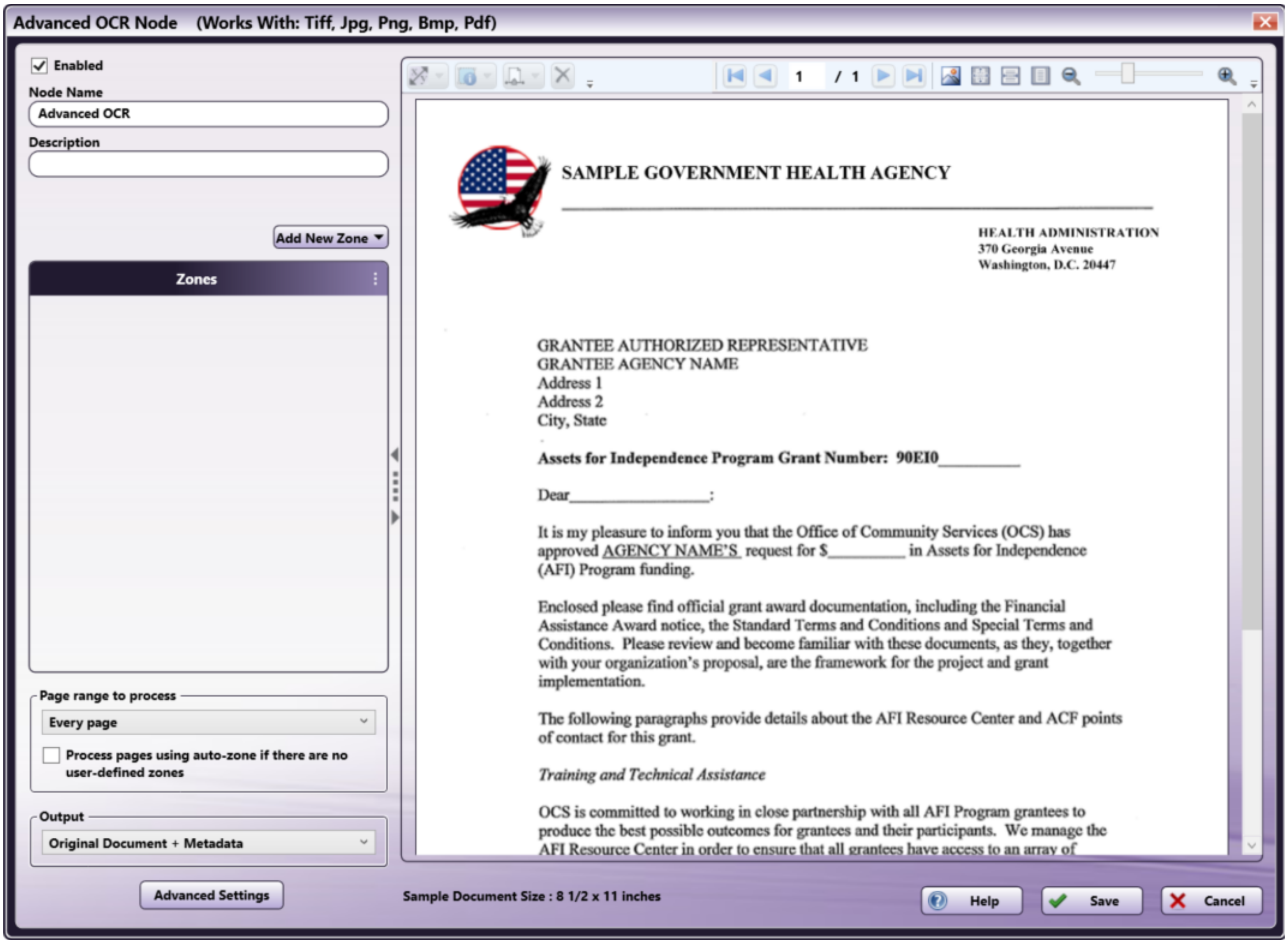
Use the Advanced OCR process node to refine optical character recognition (OCR) results and extract metadata through the use of **zones**. Through zones, you can define how you want the OCR engine to recognize various elements on the page such as text, forms, tables, graphics, etc. For example, to capture 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 Stratus 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.

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:

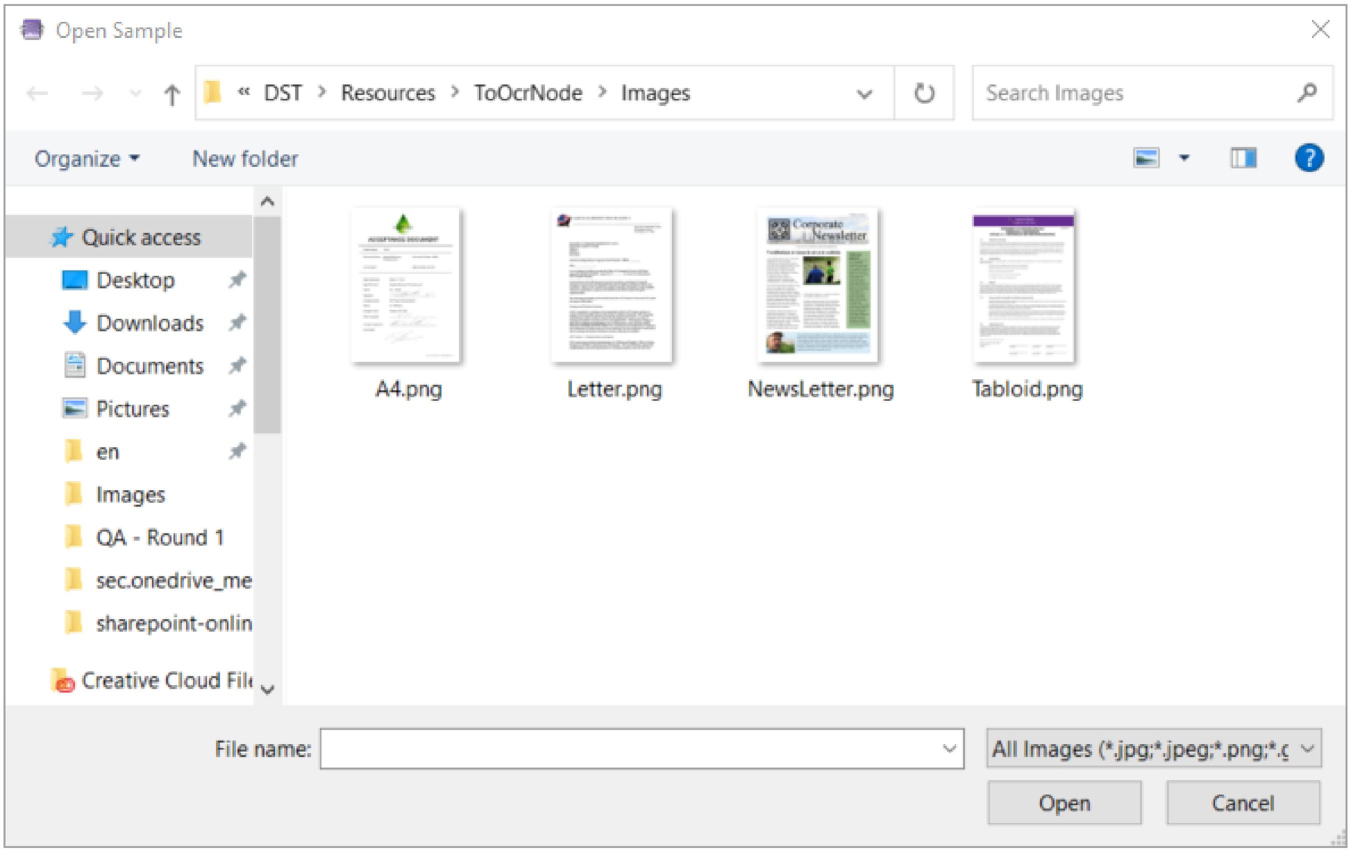
- **Preview Area**
- **Top Toolbar**
- **Zones List**
- **Additional Settings**

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
```

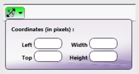
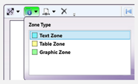
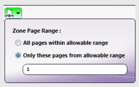
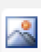
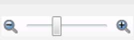
Select a document and click **Open**. The sample document appears in the Preview area.

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**.

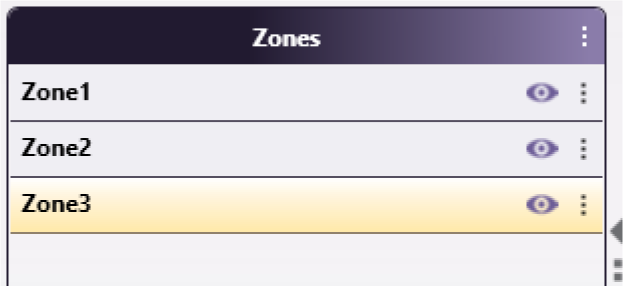
When using the drop-down palettes on the Toolbar, pressing the **Enter** key or clicking anywhere outside of the palette applies those changes to the zone.

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.

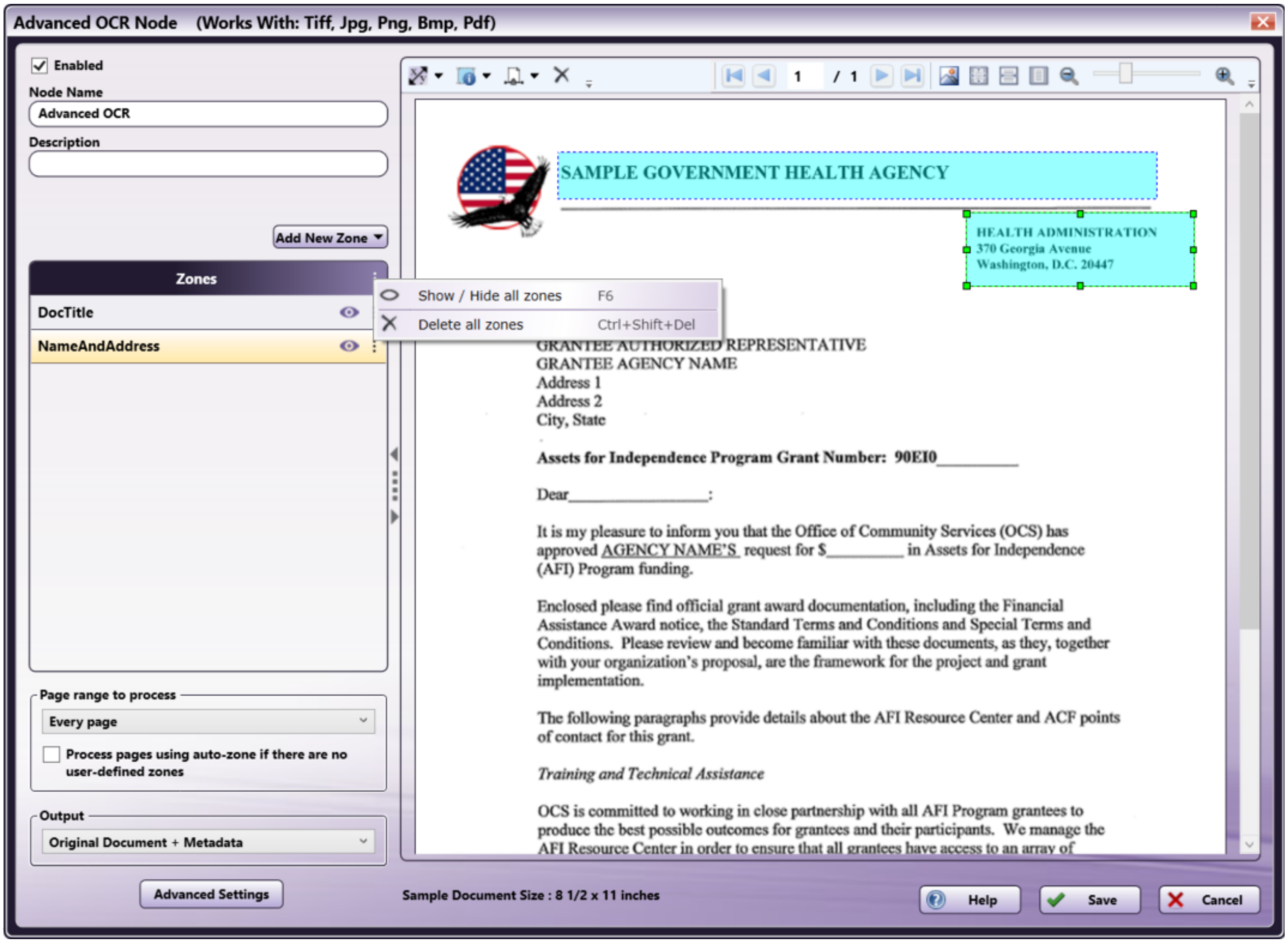
Zones List

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:

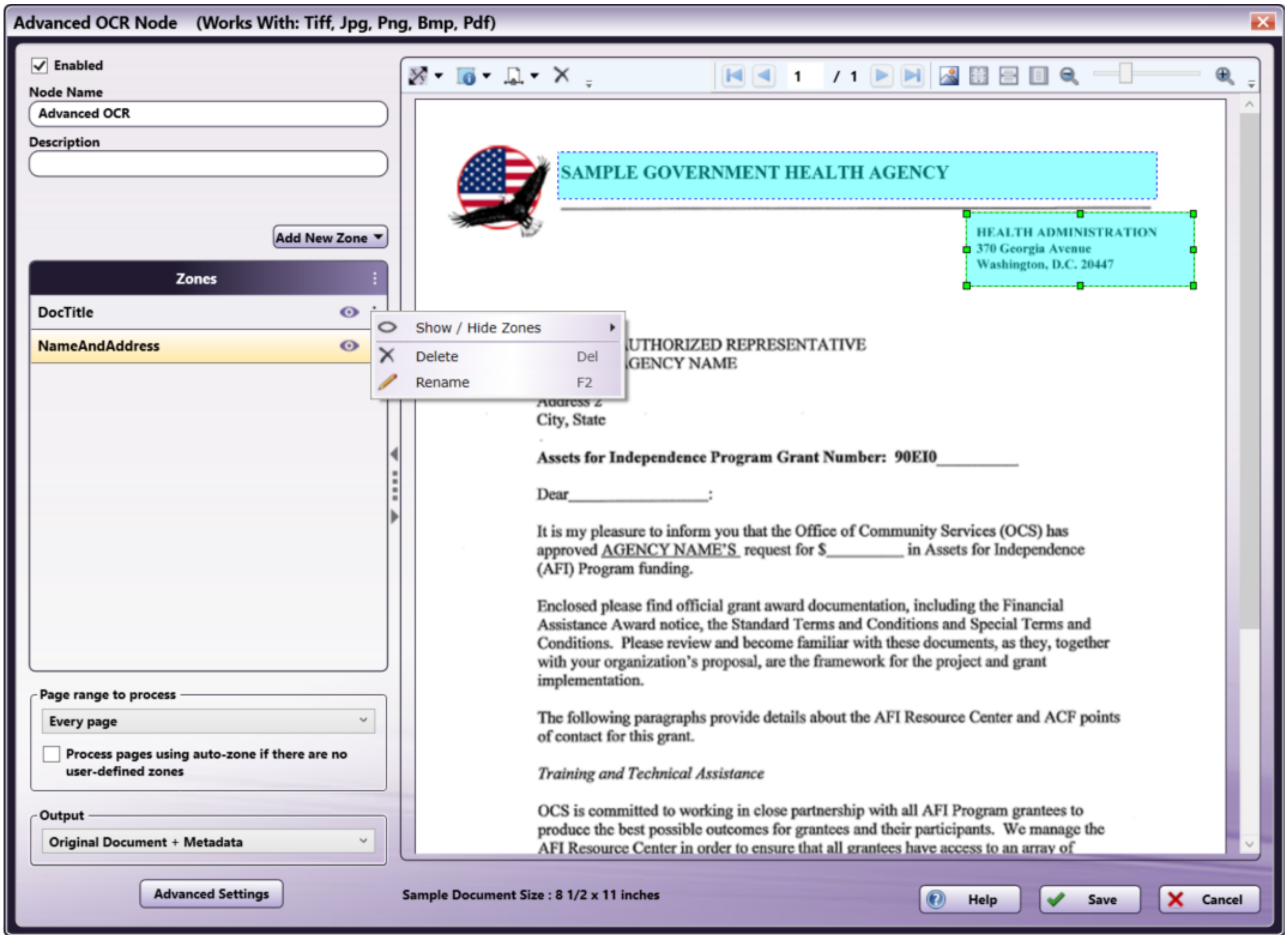


Clicking the three dots in the **Zones** area will open up the **More Actions Menu** that allows you to:

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:

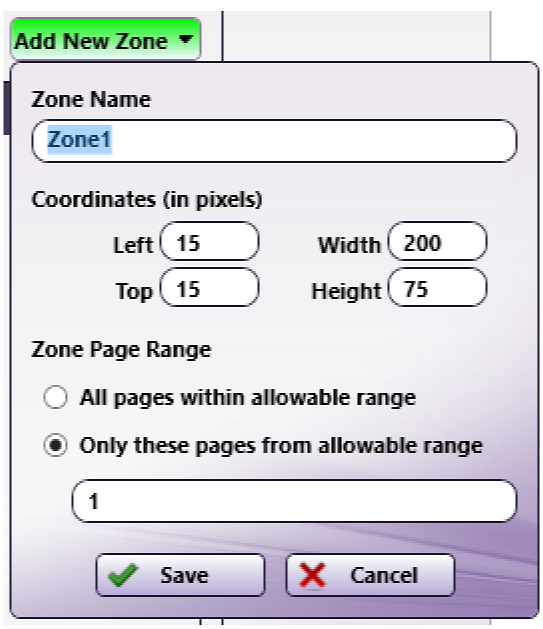
1. Click and drag the mouse in the Preview area to highlight multiple zones at once
2. Use CTRL+Click to select multiple zones. This method works in the Zones area and in the Preview area.

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

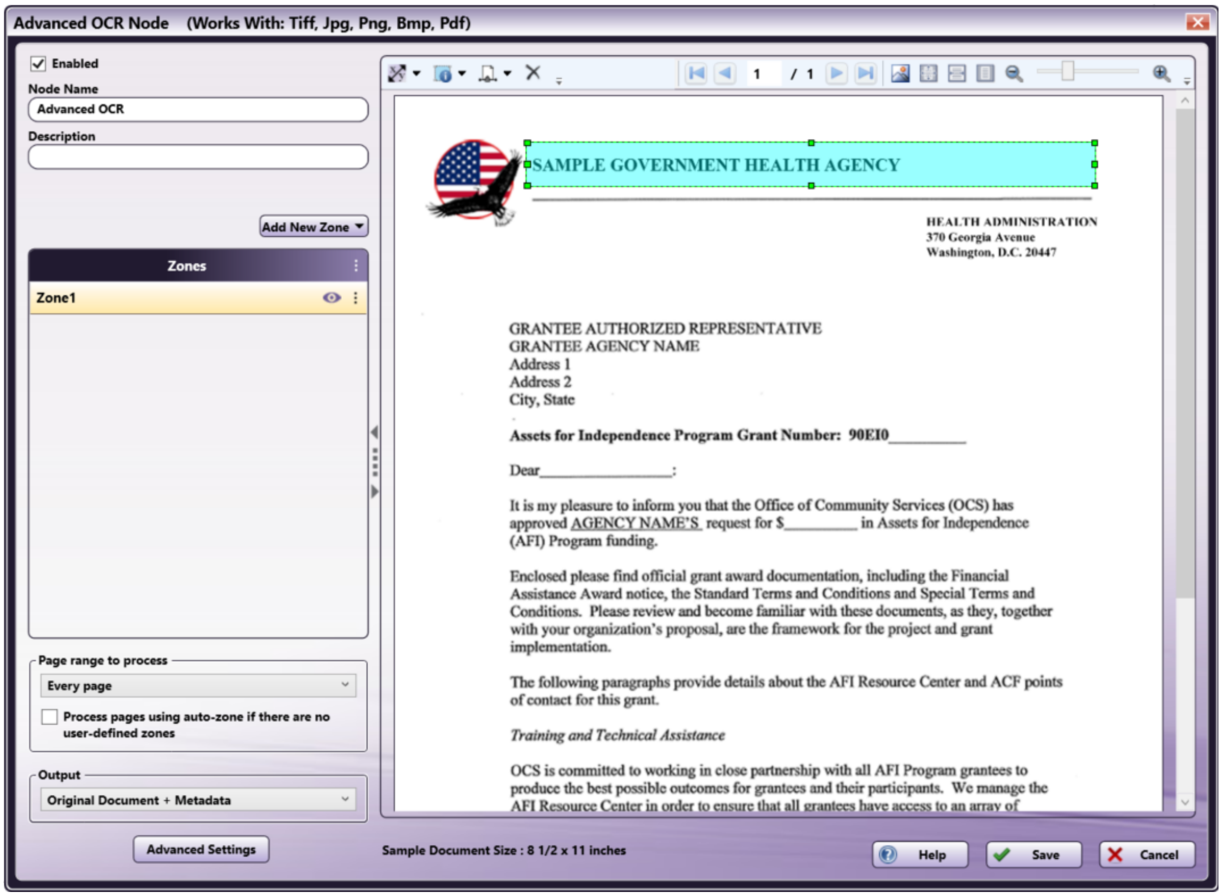
To create zones, do the following:

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

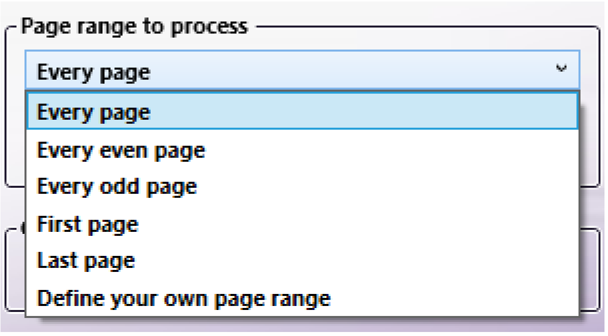
Once you define an OCR zone, other nodes in the workflow can reference it. For more information about OCR Metadata and Metadata syntax, see the **Metadata Browsing** page.

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.

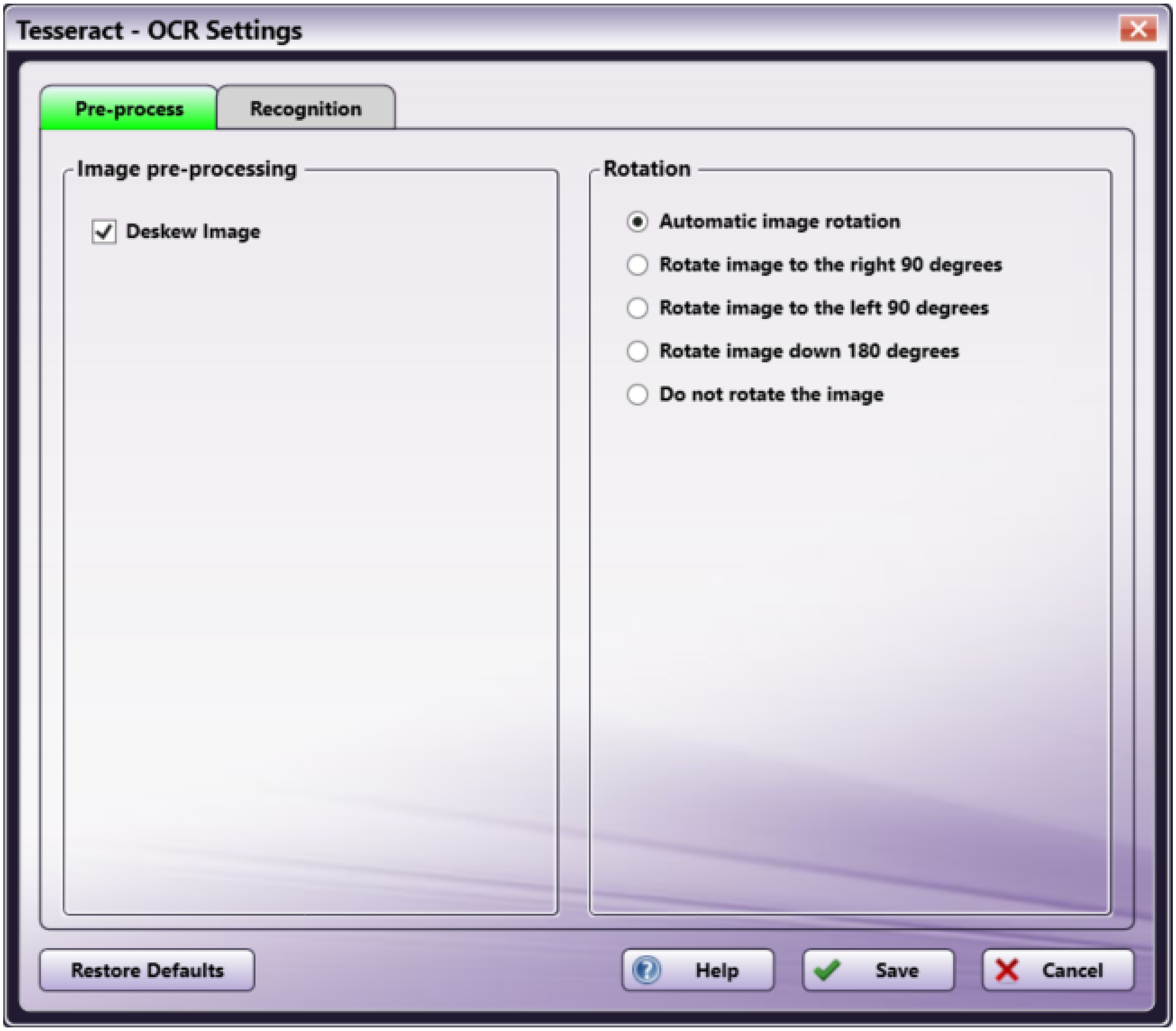
At the Output field, if you click on the drop-down, a list of output options appears:

- **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 Stratus 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.

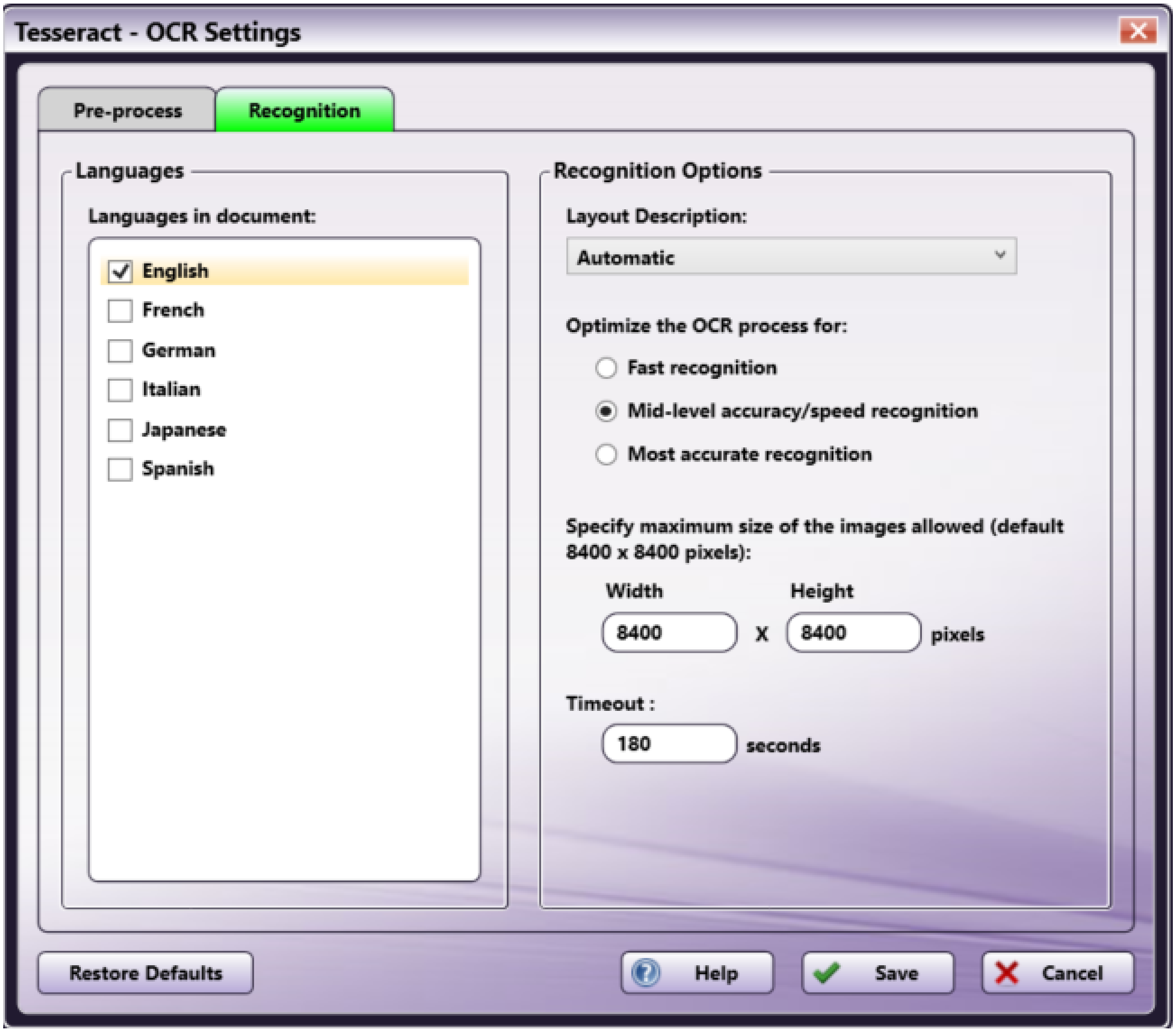
- **Automatic image rotation** - When this setting is enabled, the orientation of incoming images is detected and improperly oriented page images are automatically rotated (by 90, 180, or 270 degrees) before OCR takes place. This enabled option is the default value for rotation and mirroring.
- **Rotate image to the right 90 degrees** - When this setting is enabled, improperly oriented page images are rotated by 90 degrees, clockwise.

  Important! Dispatcher Stratus 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 Stratus 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

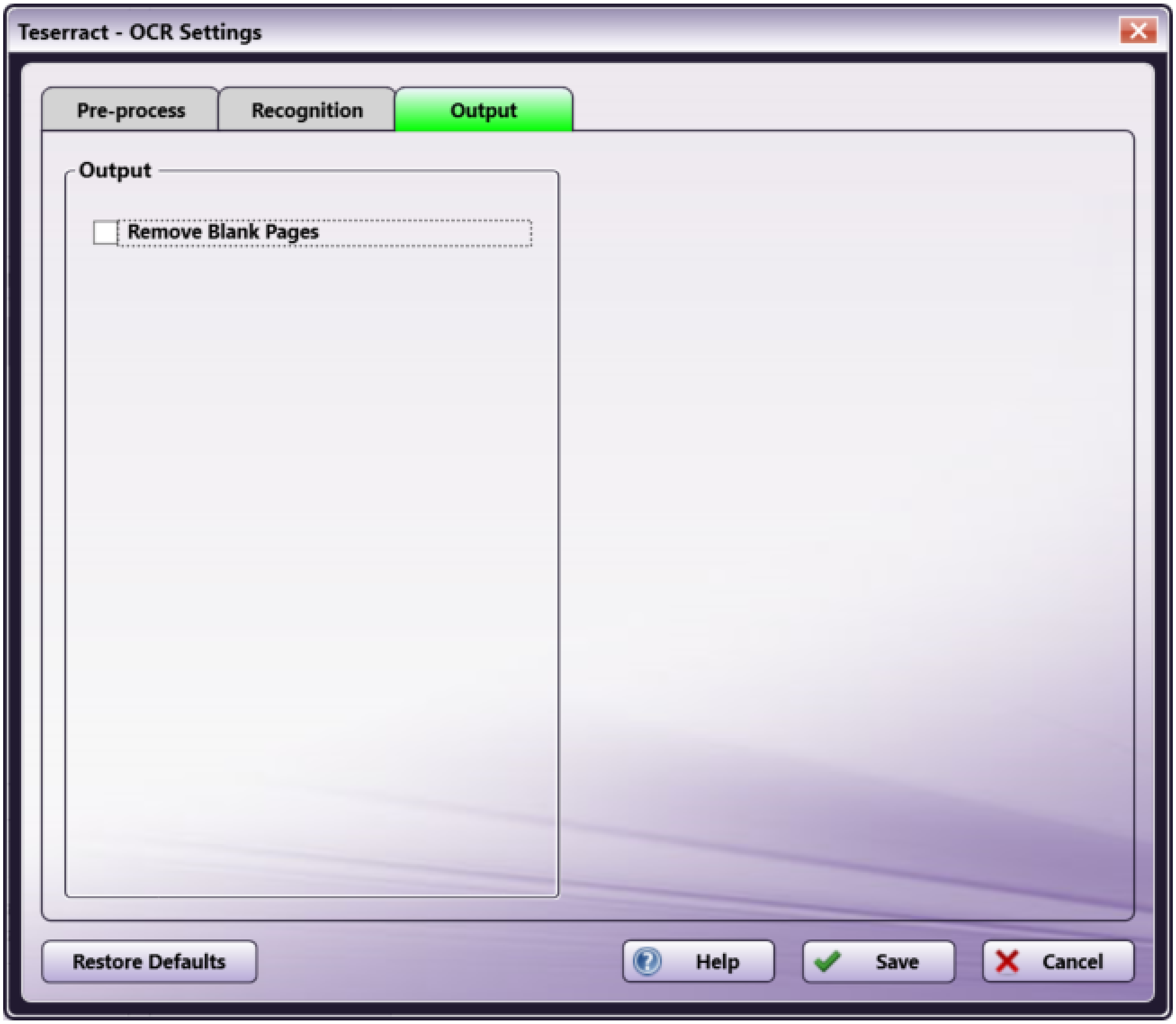
- **Automatic** - To auto-detect the layout (e.g., whether the text is in columns, etc.), select this option. This option allows for the speediest processing time. This option is useful if:
  - You want to process your documents quickly.
  - Your documents contain pages with different/unknown layouts.
  - 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.

People Nodes

Overview of People Nodes

The People Nodes allow for areas of human interaction within automated document workflows. For example, you can use a People User or People Group node in a workflow to alert a team member of a task they must complete before the workflow can continue. Similarly, a People Queue node creates a pool of jobs that can be claimed and processed by any queue member. For more information about how People nodes function in workflows, see the **Building a Workflow with People Nodes** section.

People - Edit and Approve Node

This node sends a job to a licensed tenant member, who can then view and/or edit documents in the workflow.

People Queue - Edit and Approve Node

This node sends a job to a queue, where it is available for any member of the queue to view and/or edit documents in the workflow.

People Group Node

This node sends a job to a default user within a pre-created group. Depending on configuration, the default user may be able to reassign the job to another member of the group.

People Queue Node

This node sends a job to a queue, where it is available for any member of the queue to accept and process.

People User Node

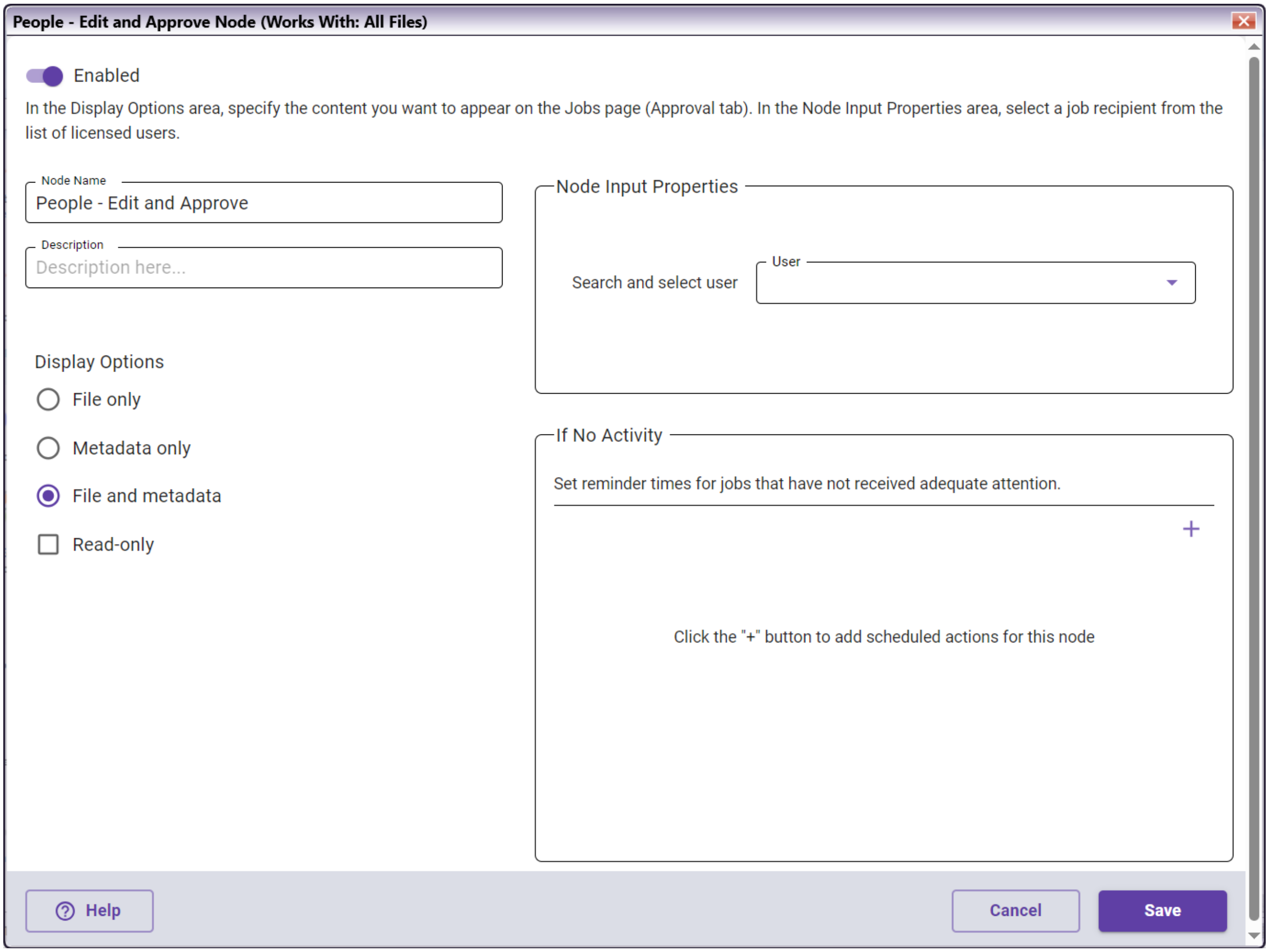
This node sends a job to a preconfigured individual user.

People - Edit and Approve

The People - Edit and Approve node is typically used for jobs that only need approval and not other interactions. This node will send a job to a licensed tenant member, who can then view and/or edit documents in the workflow. For example, you can include this node in a workflow in which a default group member sends a request to a tenant group to review and approve/deny a scanned document and the document's metadata generated by the workflow. For more information about how People nodes function in workflows, see the **Building a Workflow with People Nodes** section and the **Interacting with Workflows** page.

Configuring the People - Edit and Approve Node

To open the Edit and Approve node's configuration window, add a Edit and Approve node to your workflow and double-click on it.



- **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. While the workflow will still validate, jobs and documents will pass along all Normal and User-Selectable connections configured from this node. Error and Negative connections will be ignored.
- **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.

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.

Display Options

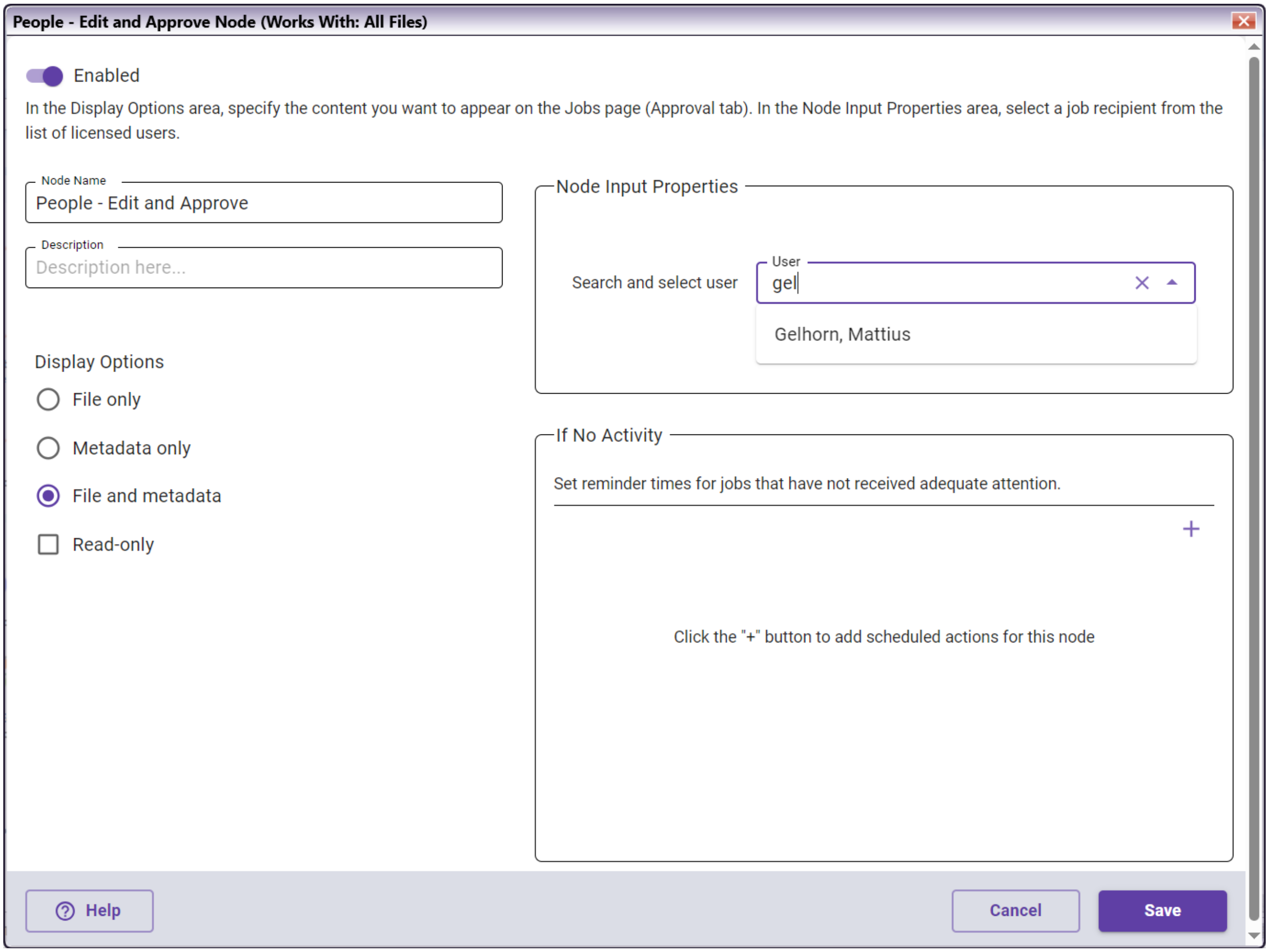
Select the content you want to display for reviewers accessing the job. The content appears on the Job page's Attachments tab. You have the following options:

- File only - Display only the file attachments from the job.
- Metadata only - Display only the form containing the metadata captured from the file attachment.
- File and metadata - Both the file attachment and the metadata form display on the Jobs page.
- Read Only - If you select "Metadata Only" or "File and metadata", this field activates. To restrict the selected content to read-only status when it appears on the job's Attachment tab, select the box. Otherwise, leave the box blank. If you select "File only", this box will become disabled.

Node Input Properties

To select a tenant member to review the job, do the following:

1. Enter a search string into the field, for example, the first few letters of a tenant member's first or last name. A list of all licensed tenant members whose name contains the string appears.
2. Select the member to whom you want to route the job.

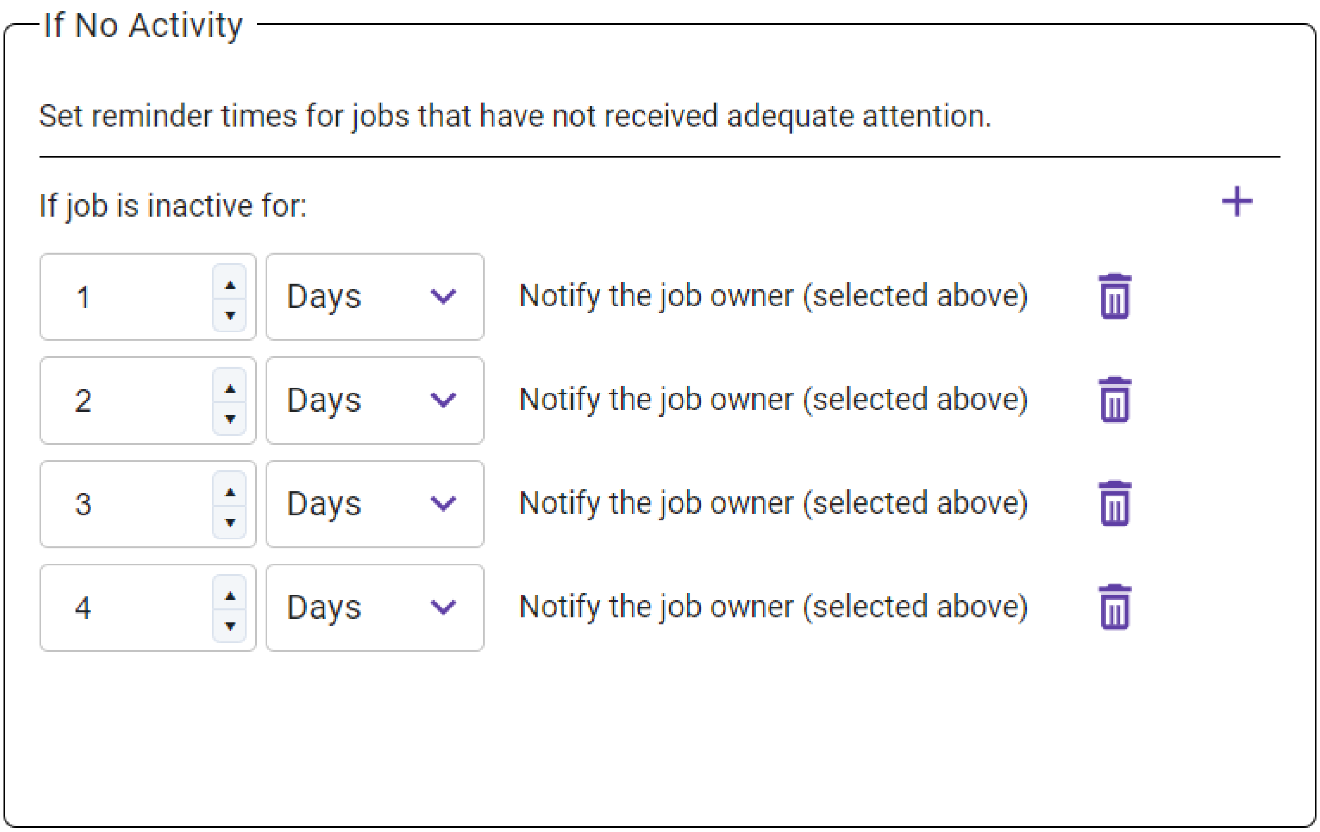


Activity Reminder

In the “If No Activity” section, you can set reminders for the user assigned to jobs from this node. After a specified amount of time, the owner of the job will recieve an inbox notification and an email reminding them of their task. To configure the activity reminder, do the following:

1. Select the **+** button to add a rule.
2. Select the **Time** and **Time Frame** for the notification.

- For example, if you would like the user to be notified after 24 hours of inactivity, you could select:
    - “24” in the Time field and “Hours” in the Time Frame field.
    - “1” in the Time field and “Days” in the Time Frame field.



Notes:

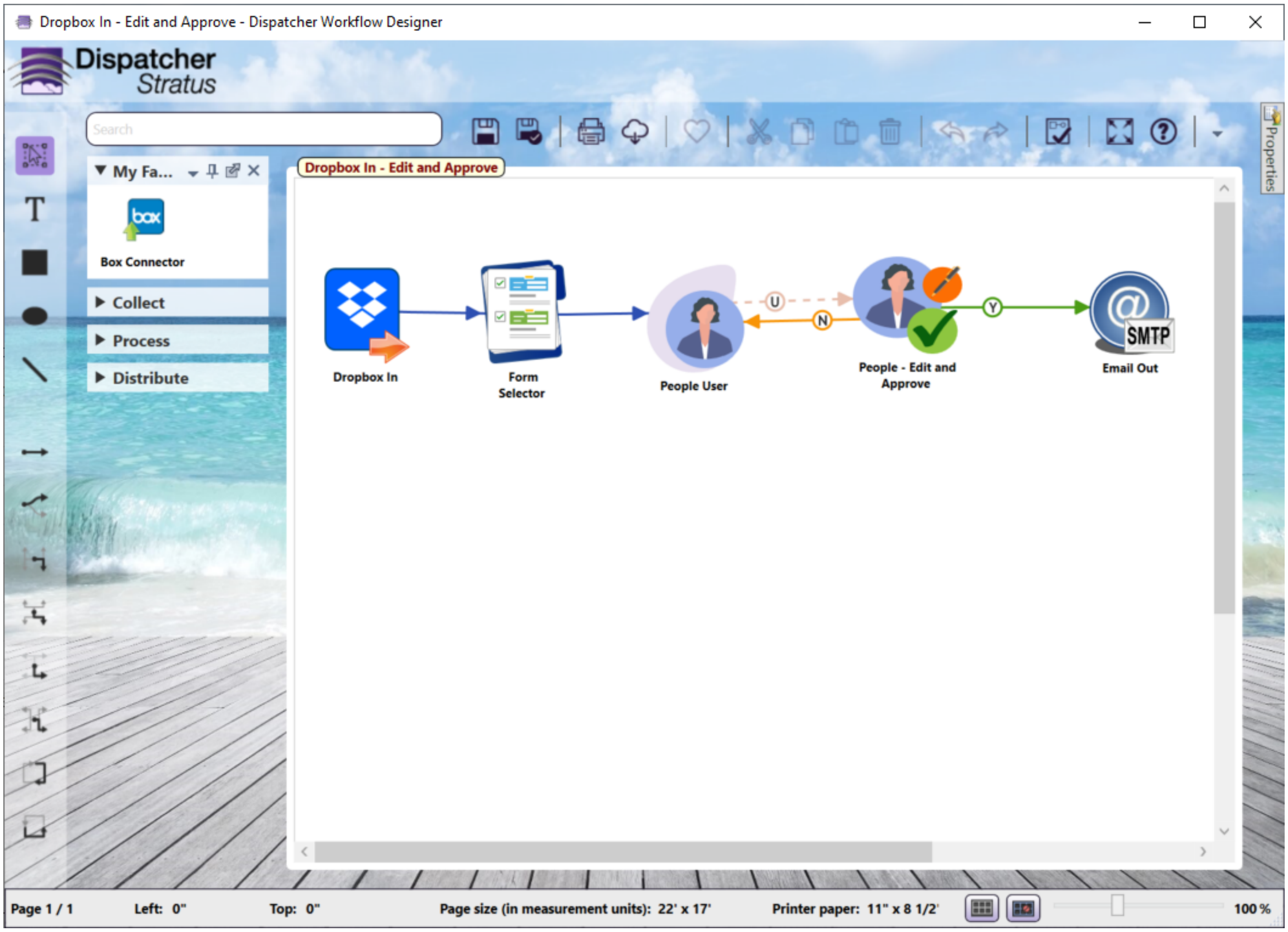
- You can configure as many reminders as you would like by selecting the **+** button multiple times.
- If there is at least one rule configured and a user interacts with a job, the timer will be reset for any pending reminders. However, any previously-sent reminders will not be reset.
  - For example, say a job has reminders set for 1, 2, 3, and 4 days. A user interacts with the job on the 3rd day (reminders 1 and 2 have been sent out already). The user will not get a reminder after 1 or 2 days of inactivity, but will receive one after 3 additional days of inactivity (and then the 4th day of inactivity).

To delete a reminder, select the trash can icon.

Running the Workflow

Once you save the node and verify the workflow, you can run the workflow. When the workflow reaches the Edit and Approve node, the job recipient's Jobs page will update to display an Approval tab, on which the elements you specified in the Display Options area will display on the tab, along with Deny and Accept buttons. The recipient can then review the content on the tab, approve or deny it, and move the job to the next step in the workflow.

The following illustration shows a sample workflow containing the Edit and Approve node:



- **Dropbox In** - Collect documents from a Dropbox folder.
- **Form Selector** - Define the metadata you want to collect from the documents.
- **People User** - Define the tenant member who will assign a tenant member to review the documents.
- **People - Edit and Approve** - Define the tenant member who will receive the job and review and approve/deny the documents and/or metadata.
- **Email Out** - Define the tenant member who will receive the results of the review.

People Queue - Edit and Approve

Use this node in workflows in which a job requires approval from one or more team members. The collection node in the workflow creates a job, and this node sends the job to a selected job queue, where members of the queue can claim the job and then view and/or edit documents and/or metadata from the workflow.

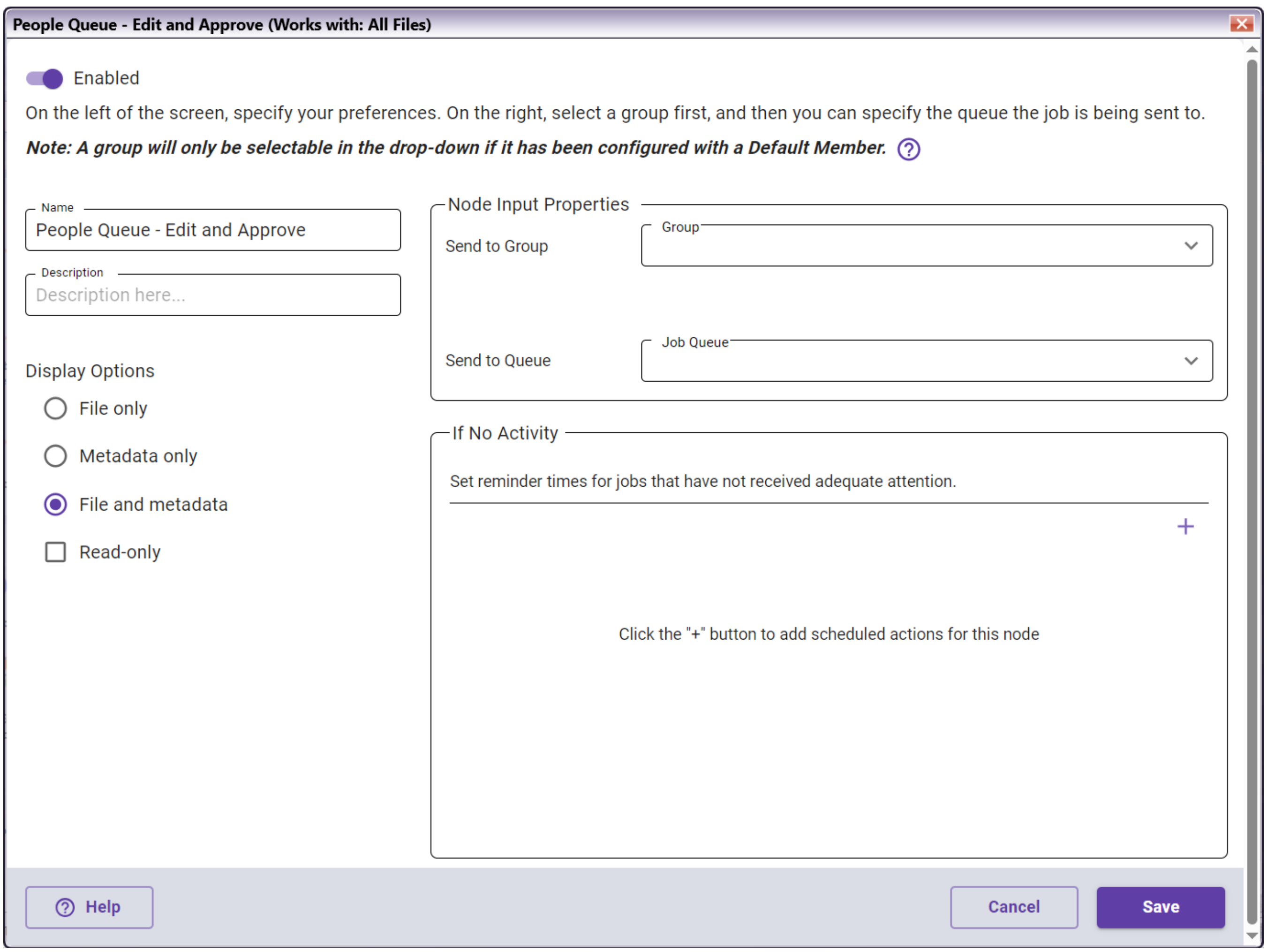
For example, assume a default group member has a batch of documents that require review as soon as possible. The user can insert a People Queue - Edit and Approve into a workflow to make the documents available to a group of team members (the job queue), with the request that they be reviewed by the first available team member.

See Also:

- **Building a Workflow with People Nodes**
- **Interacting with Workflows**

Configuring the Node

To configure the node, drag it from the **Node Palettes panel** onto the canvas and double-click on it. The node's configuration window appears, displaying the following options:



- **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. While the workflow will still validate, jobs and documents will pass along all Normal and User-Selectable connections configured from this node. Error and Negative connections will be ignored.
- **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.

Display Options

Select the content you want to display for reviewers accessing the job. The content appears on the Job page's **Attachments tab**. You have the following options:

- File only - Display only the file attachments from the job.
- Metadata only - Display only the form containing the metadata captured from the file attachment.
- File and metadata - Both the file attachment and the metadata form display on the Jobs page.
- Read Only - If you select “Metadata Only” or “File and metadata”, this field activates. To restrict the selected content to read-only status when it appears on the job's Attachment tab, select the box. Otherwise, leave the box blank. If you select “File only”, this box disables.

Node Input Properties

To select a job queue to review the job, do the following:

1. **Send to Group** - Select the field, then choose a group. The menu displays all **user groups** of which you are a member.
2. **Send to Queue** - Select the field, then choose a queue. The menu displays all job queues associated with the selected user group.

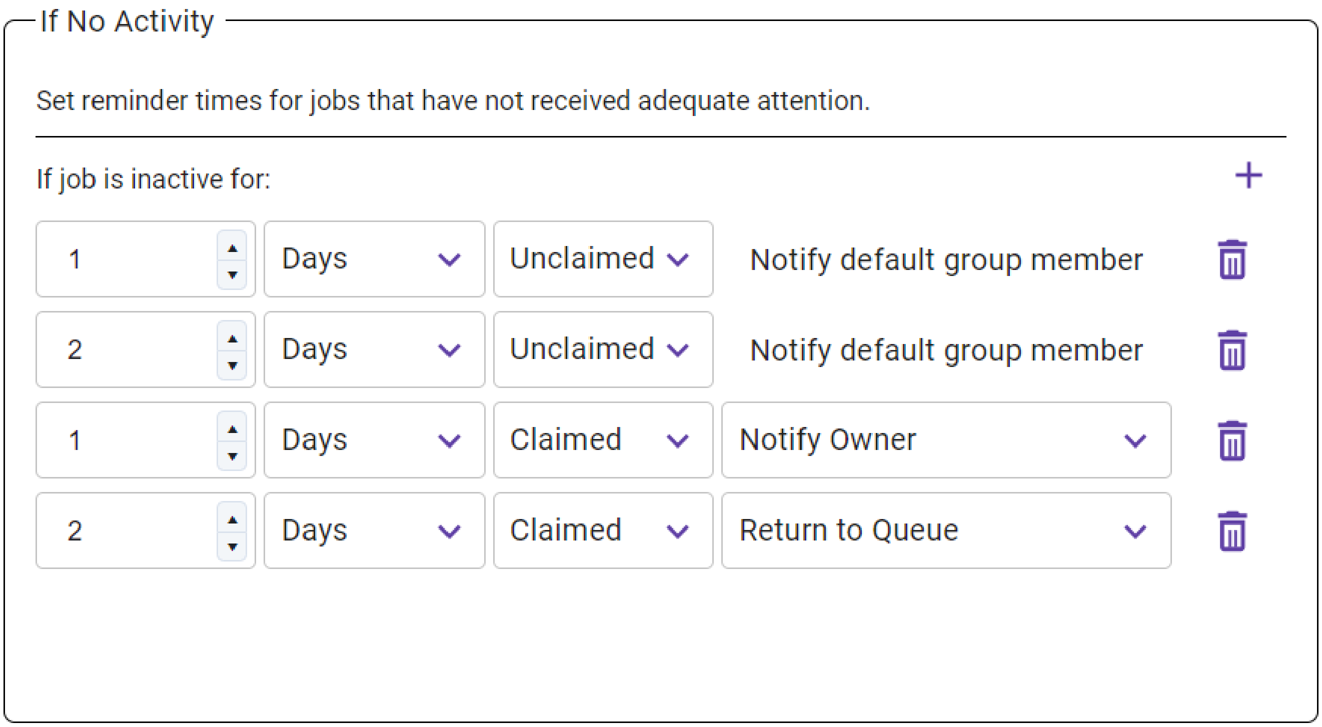
Activity Reminder

In the “If No Activity” section, you can set reminders for the user assigned to jobs from this node. After a specified amount of time, the owner of the job will recieve an inbox notification and an email reminding them of their task. To configure the activity reminder, do the following:

1. Select the **+** button to add a rule.
2. Select the **Time** and **Time Frame** for the notification.

- For example, if you would like the user to be notified after 24 hours of inactivity, you could select:
    - “24” in the Time field and “Hours” in the Time Frame field.
    - “1” in the Time field and “Days” in the Time Frame field.

3. Select whether the notification applies to **Claimed** or **Unclaimed** jobs. For Unclaimed jobs, the User Group’s Default Member will recieve the notification.



4. For Claimed jobs, you will need to select one of the following options:

- **Notify Owner** - The user who claimed the job will receive a notification.
- **Return to Queue** - The job will become unclaimed and be returned to the queue, where it can be claimed normally. No notification is sent.

Notes:

- You can configure as many reminders as you would like by selecting the **+** button multiple times.

- If there is at least one rule configured and a user interacts with a job, the timer will be reset for any pending reminders. However, any previously-sent reminders will not be reset.
    - For example, say a job has reminders set for 1, 2, 3, and 4 days. A user interacts with the job on the 3rd day (reminders 1 and 2 have been sent out already). The user will not get a reminder after 1 or 2 days of inactivity, but will receive one after 3 additional days of inactivity (and then the 4th day of inactivity).
- If a user group's Default Member's jobs are configured to be sent to another user via **Out of Office** or **temporary transfer** and a People Queue node is configured to notify Unclaimed (which notifies the User Group's Default Member), The Default Member and the user selected in the transfer settings will both receive an email and an Inbox message.

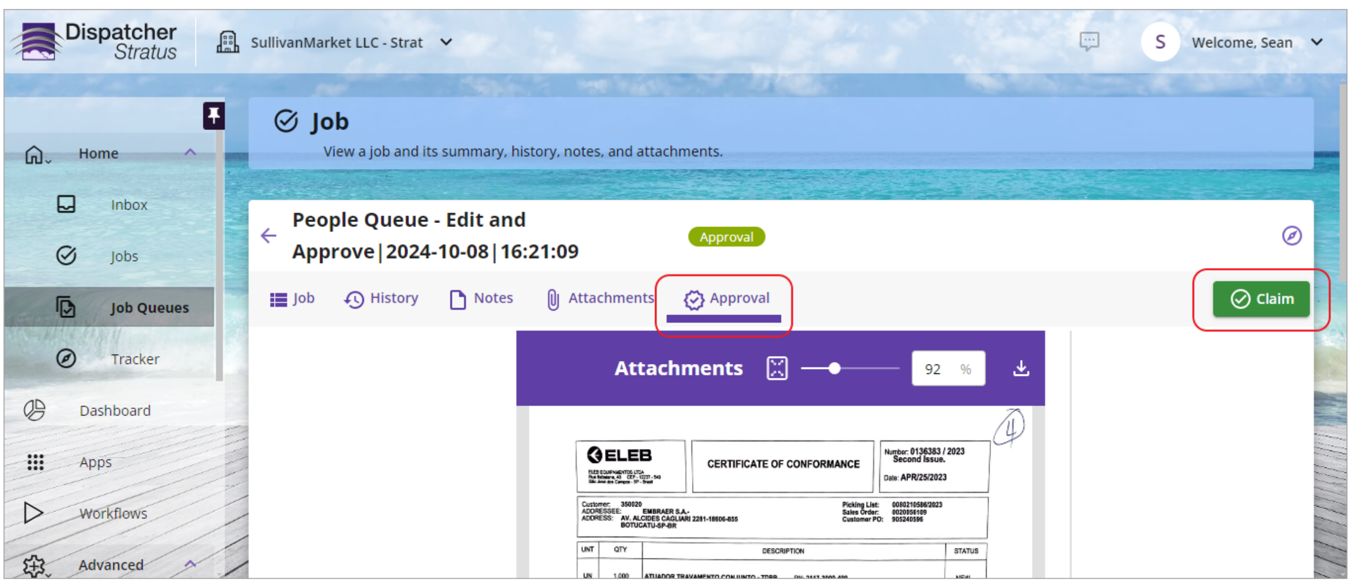
To delete a reminder, select the trash can icon.

Accessing and Reviewing the Job

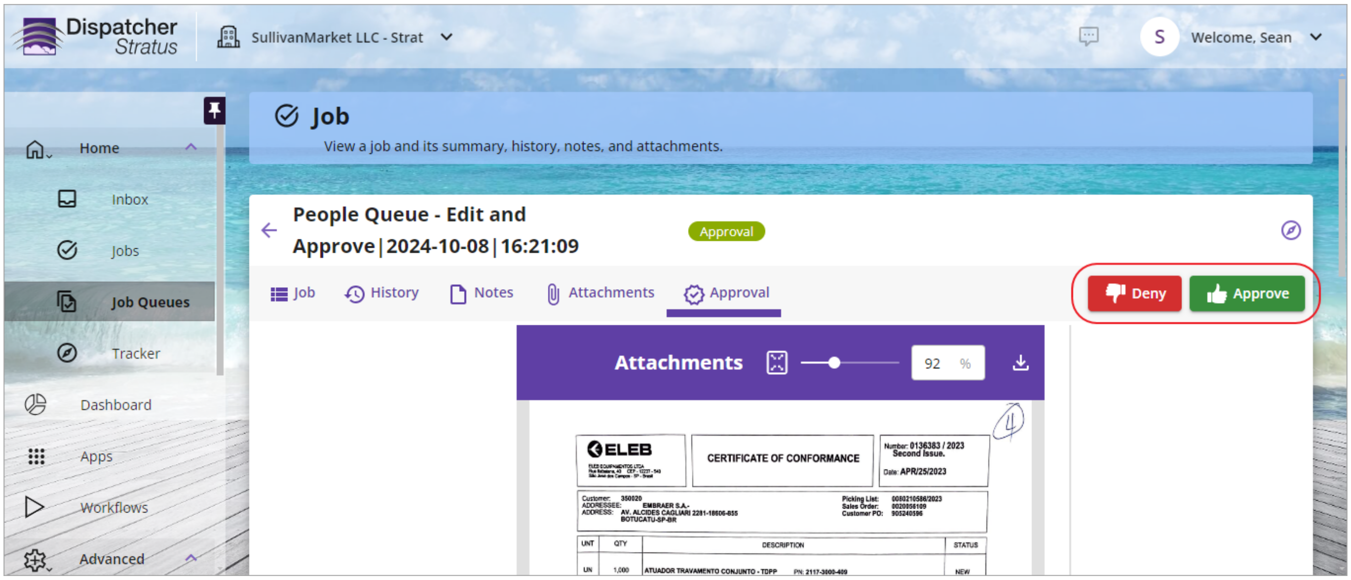
Once you save the node and verify the workflow, you can run the workflow. When the workflow processes the People Queue - Edit and Approve node, the **Job Queue** page updates for users belonging to the selected job queue. The job now appears in their job queue.

Selecting the job from the job queue list opens the **Job page**, on which the job displays. The job includes an **Approval** tab. This tab displays the items to review (that is, the items specified in the **Display Options** area of the People Queue - Edit and Approve node, in the workflow that generated the job).

If the user has not already claimed the job, the **Claim** button appears:



Once the user selects **Claim**, the button is replaced by the **Deny** and **Approve** buttons:

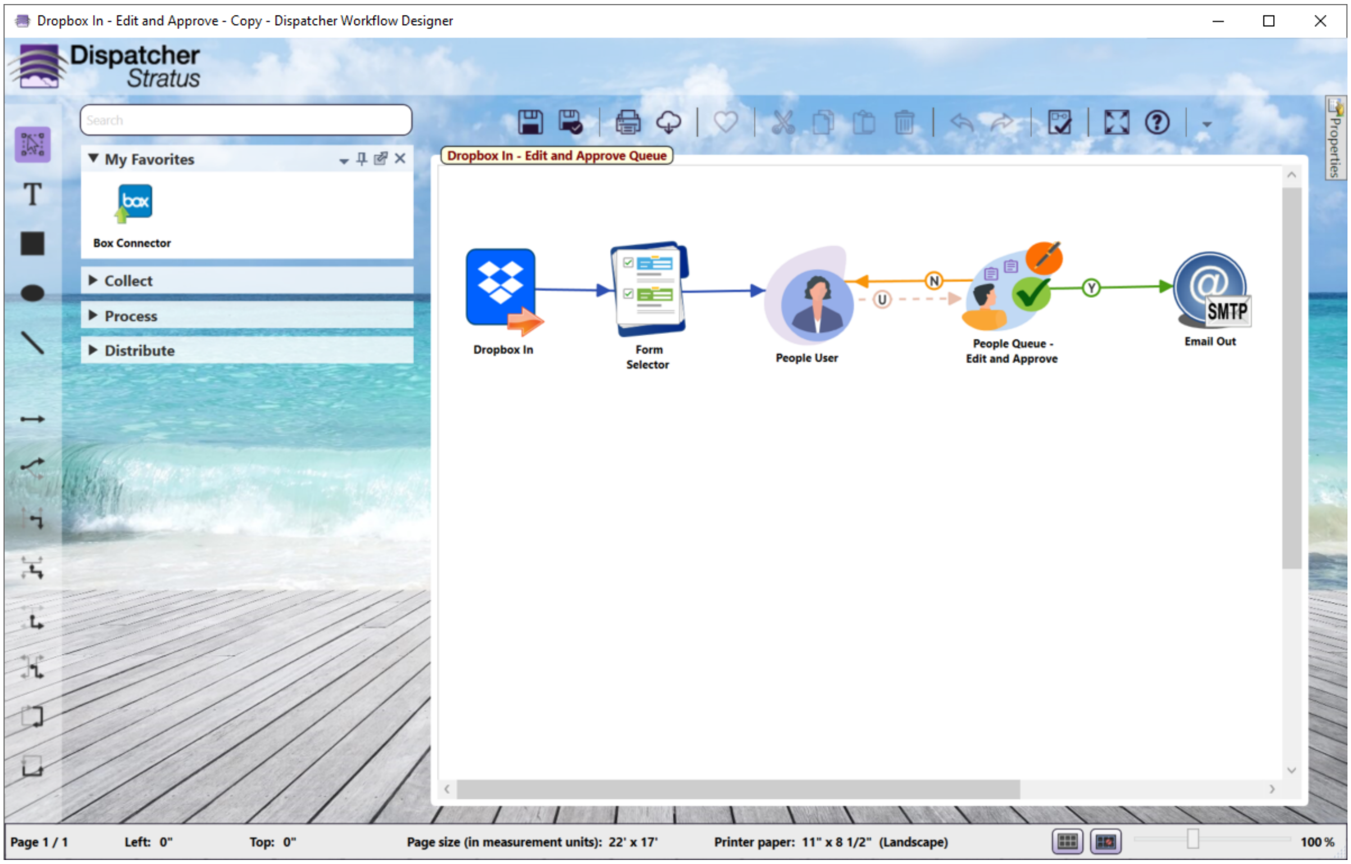


The user can then review the content on the tab, approve or deny it, and move the job to the next step in the workflow.

Sample Workflow

The following illustration shows a sample workflow containing the People Queue - Edit and Approve node. The workflow:

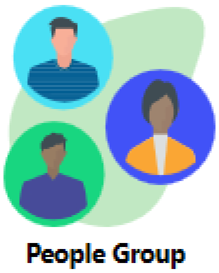
- Collects documents and creates a job.
- Collects selected metadata from the documents.
- Places a notification in a selected user's inbox, requesting they assign the job (to review the documents collected by the workflow) to a job queue.
- Adds the job to the selected job queue, enabling a member of the queue to claim the job and review the documents.
- Sends the reviewed documents to a selected email account.



The nodes perform the following functions in the workflow:

- **Dropbox In** - Collects documents from a selected Dropbox folder.
- **Form Selector** - Adds a form to the workflow. The form defines the metadata you want to collect from the documents.
- **People User** - Defines the tenant member who will receive a notification in their inbox,requesting they assign a tenant member to review the documents.
- **People Queue- Edit and Approve** - Defines the job queue that receives the job. A member of the job queue can then claim the job and review and approve/deny the documents and/or metadata.
- **Email Out** - Defines the tenant member who will receive the results of the review.

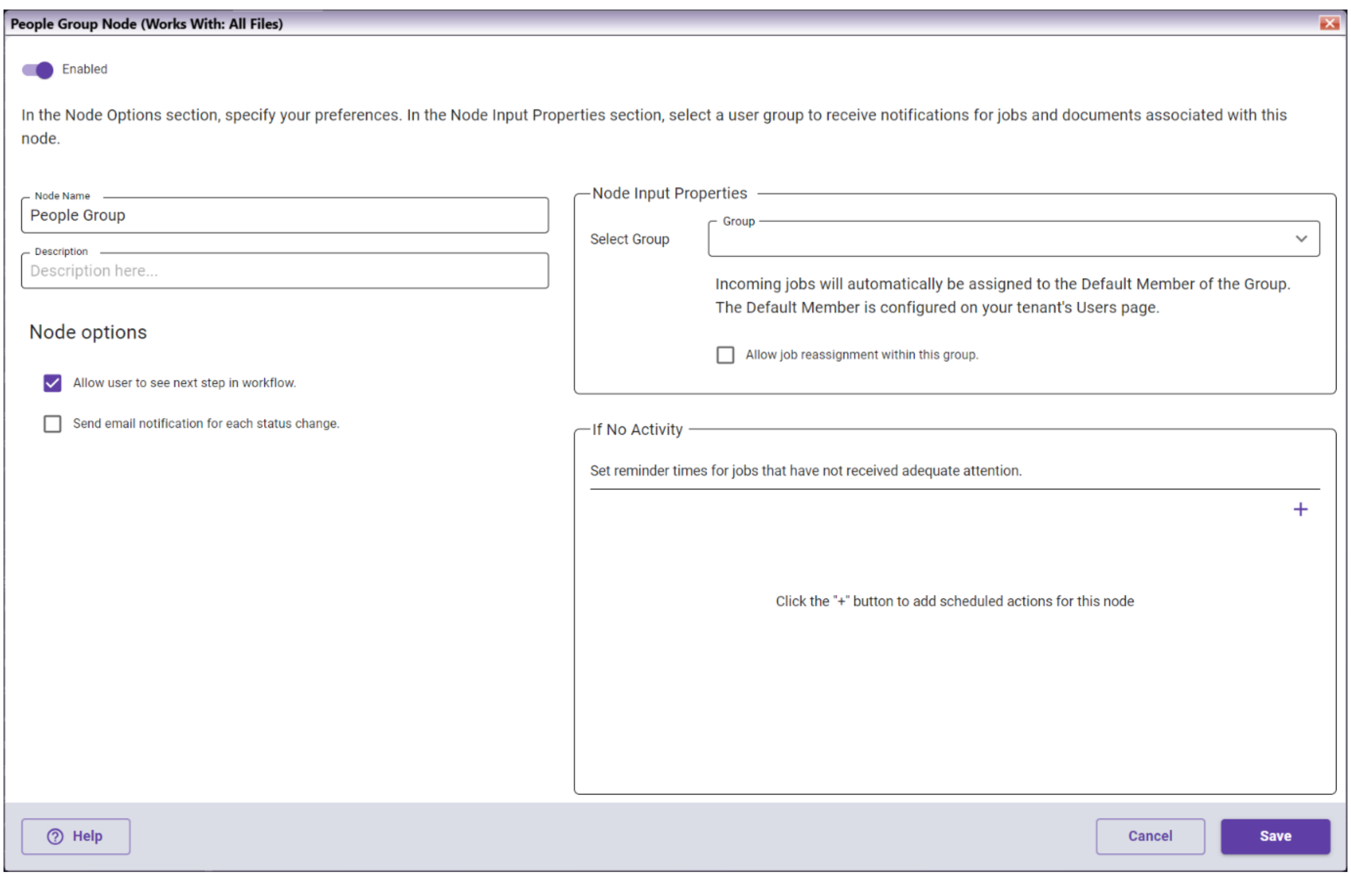
People Group



The People Group node is typically used for jobs that are usually handled by one individual but can be completed by any member of a group. This node will send jobs to a User Group's Default Member. That user can then reassign the job to another user in the group (depending on the node configuration) or complete the job themselves and send it to the next step in the workflow. For more information about how People nodes function in workflows, see the **Building a Workflow with People Nodes** section and the **Interacting with Workflows** page.

To open the People Group node's configuration window, add a People Group node to your workflow and double-click on it.

Configuring the 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, the workflow will ignore it. While the workflow will still validate, jobs and documents will pass along all Normal and User-Selectable connections configured from this node. Error and Negative connections will be ignored.
- **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.

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.

Node Options

This node includes the following “response options” that enable a job’s owner to understand the status of the workflow:

- Allow user to see next step in workflow - Selecting this option allows the job owner to see what the next step in the workflow is before completing their assigned job. This option is required if there are multiple user-selectable connections from the node, so the user can see the options to send the job to next.
- Send email notification for each status change - When this option is selected, Dispatcher Stratus will send an email to any previous owners of a job (not the user currently performing the action). This option has no effect on job notifications within Dispatcher Stratus.

  For example, if User A reassigns a job to User B, User A will get an email when User B accepts the job. Then, if User B reassigns the job to User C, User A will get an email that the job has been reassigned, and both User A and User B will get emails when User C accepts the job. If user C then completes the job, Users A and B will get emails saying the job is complete.

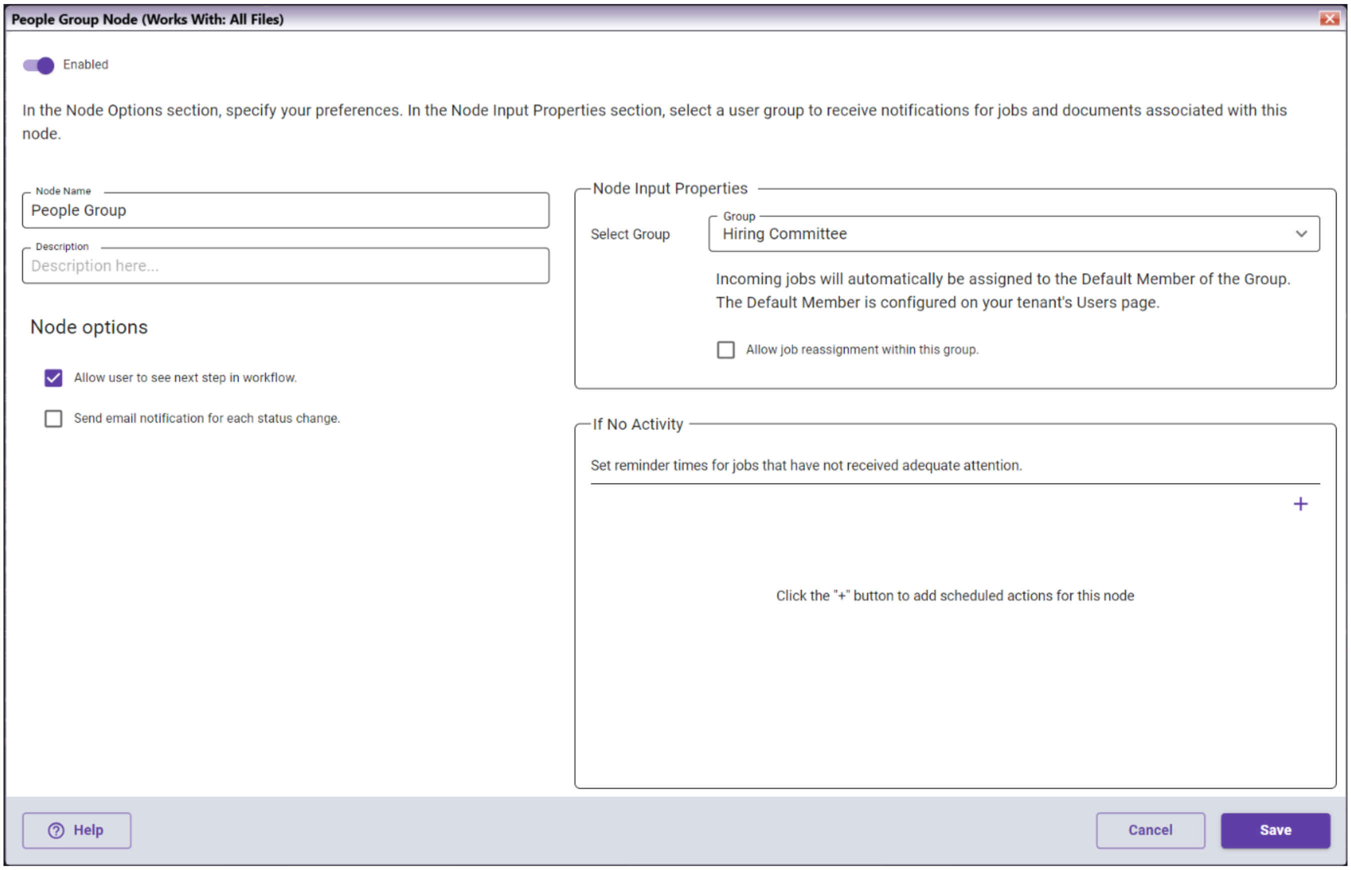
  Notes:

  - Selecting this option does nothing if the “Allow job reassignment” option (below) is not also enabled.
  - This option is node-specific. Every past job owner (except the current owner taking the action) will receive an email for each action until the job passes to the next node, but will not receive further emails as the job progresses through the workflow. Similarly, users will not receive emails for actions taken in previous nodes.

Node Input Properties

To configure the People Group node, do the following:

1. Click in the “Group” field.
2. Select the group you would like jobs assigned to. Note that all jobs will be assigned to the Default Member of the group.
3. Select whether jobs assigned to the group’s Default User will have the option to reassign jobs. If you select this option, the group’s Default User will be able to reassign the jobs to any other member of that group.



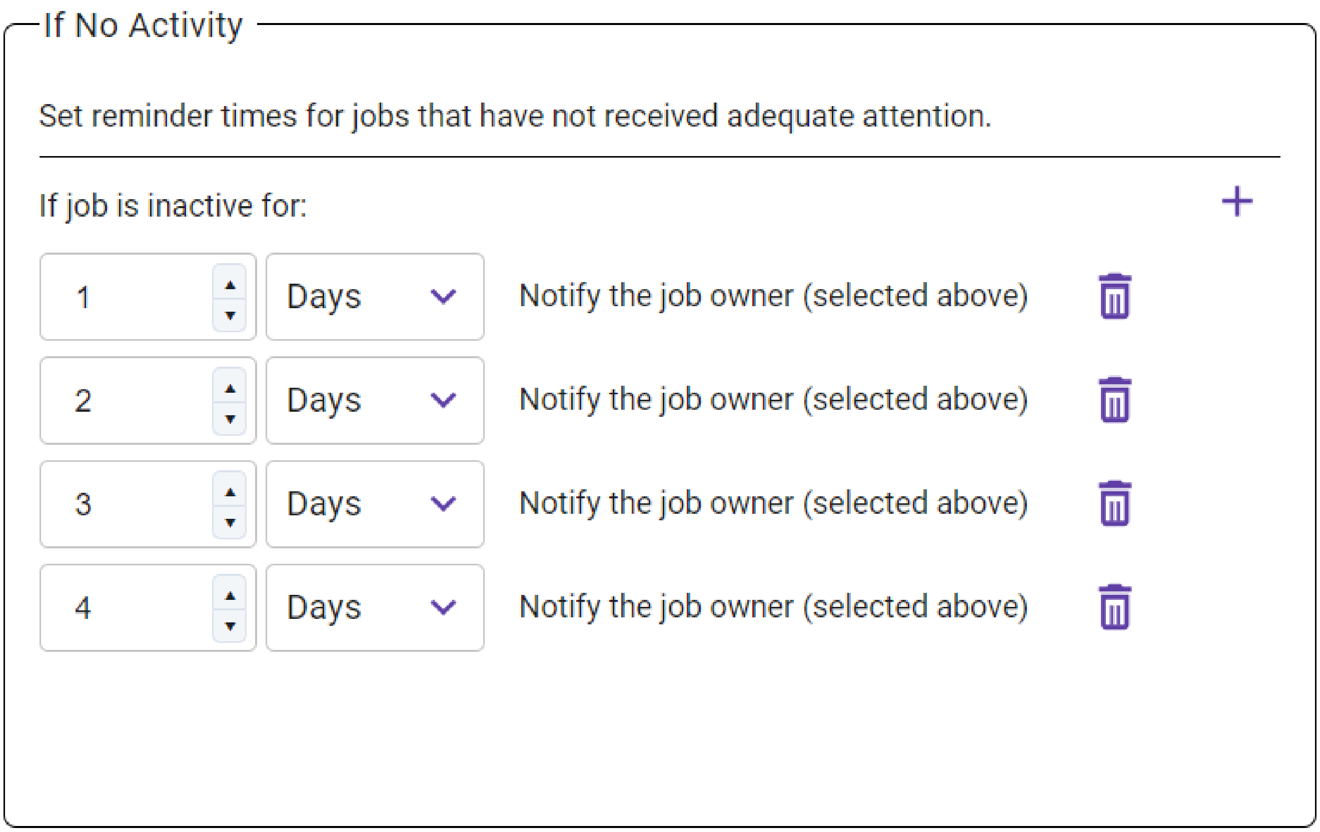
4. Click the Save button to save the configuration and close the node.

Activity Reminder

In the “If No Activity” section, you can set reminders for the user assigned to jobs from this node. After a specified amount of time, the owner of the job will recieve an inbox notification and an email reminding them of their task. To configure the activity reminder, do the following:

1. Select the **+** button to add a rule.
2. Select the **Time** and **Time Frame** for the notification.

- For example, if you would like the user to be notified after 24 hours of inactivity, you could select:
    - “24” in the Time field and “Hours” in the Time Frame field.
    - “1” in the Time field and “Days” in the Time Frame field.



Notes:

- You can configure as many reminders as you would like by selecting the **+** button multiple times.
- If there is at least one rule configured and a user interacts with a job, the timer will be reset for any pending reminders. However, any previously-sent reminders will not be reset.
    - For example, say a job has reminders set for 1, 2, 3, and 4 days. A user interacts with the job on the 3rd day (reminders 1 and 2 have been sent out already). The user will not get a reminder after 1 or 2 days of inactivity, but will receive one after 3 additional days of inactivity (and then the 4th day of inactivity).

To delete a reminder, select the trash can icon.

People Queue

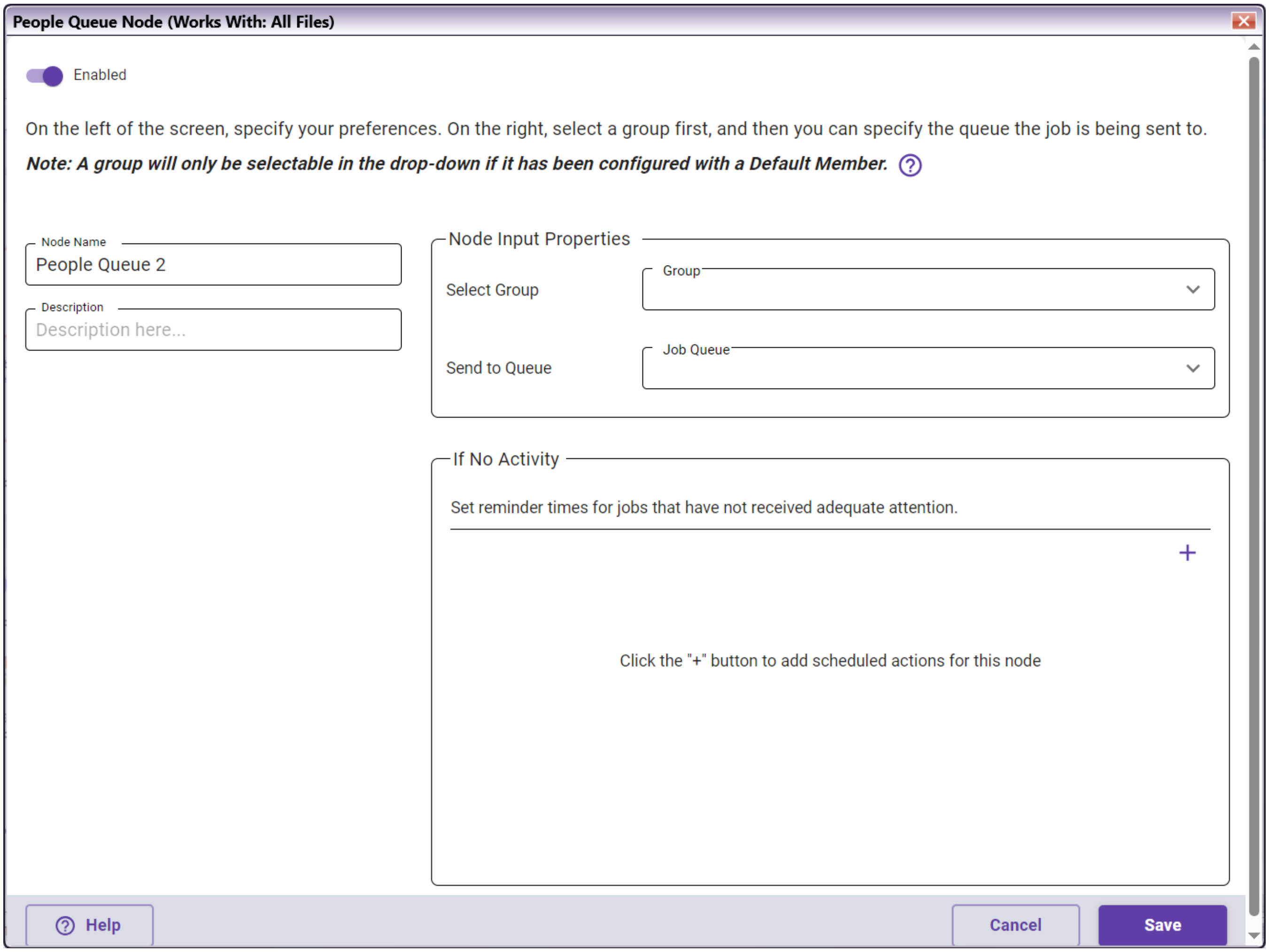
The People Queue node is commonly used for jobs that do not need to be completed by a specific individual. Common uses for the People Queue node include:

- Workflows that collect submissions until an end date before being reviewed, such as job applications or art contest entries
- Order processing, including work orders
- Backlog collection
- Etc.

Use the Queue Node to send jobs to a Dispatcher Stratus queue, where anyone with access to the **job queue** can claim the job. For more information about how People nodes function in workflows, see the **Building a Workflow with People Nodes** section and the **Interacting with Workflows** page.

To open the People Queue node's configuration window, add a People Queue node to your workflow and double-click on it.

Configuring the People Queue 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, the workflow will ignore it. While the workflow will still validate, jobs and documents will pass along all Normal and User-Selectable connections configured from this node. Error and Negative connections will be ignored.
- **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.

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.

Configuring a Queue

Within the People Queue node, there are two drop-down menus. To configure which queue the node sends jobs to, do the following:

1. In the **Select Group** drop-down, select the group you would like the job sent to.
2. In the **Send to Queue** drop-down, select the queue from the available queues in the selected group.

   Note: You must select a group before you select a queue.
3. **Save** the node configuration.

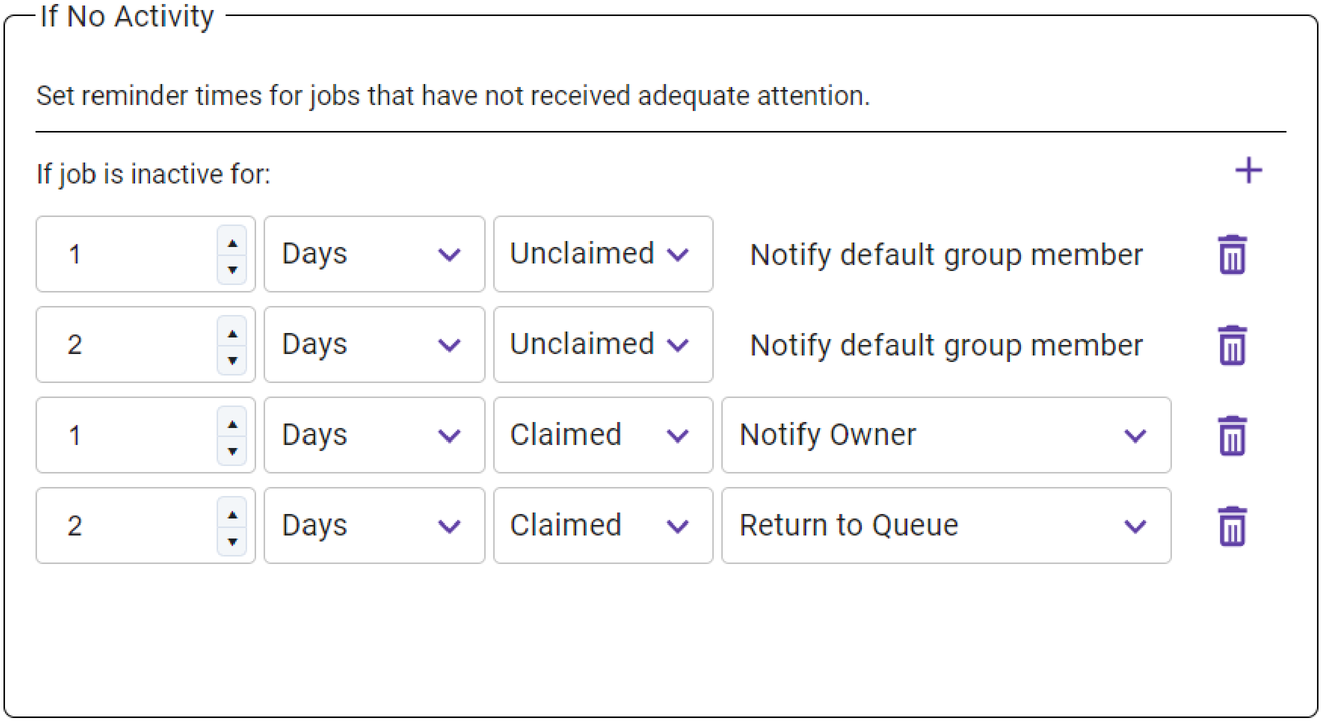
Activity Reminder

In the “If No Activity” section, you can set reminders for the user assigned to jobs from this node. After a specified amount of time, the owner of the job will recieve an inbox notification and an email reminding them of their task. To configure the activity reminder, do the following:

1. Select the **+** button to add a rule.
2. Select the **Time** and **Time Frame** for the notification.

- For example, if you would like the user to be notified after 24 hours of inactivity, you could select:
  - “24” in the Time field and “Hours” in the Time Frame field.
  - “1” in the Time field and “Days” in the Time Frame field.

3. Select whether the notification applies to **Claimed** or **Unclaimed** jobs. For Unclaimed jobs, the User Group’s Default Member will recieve the notification.



4. For Claimed jobs, you will need to select one of the following options:

- **Notify Owner** - The user who claimed the job will receive a notification.
- **Return to Queue** - The job will become unclaimed and be returned to the queue, where it can be claimed normally. No notification is sent.

Notes:

- You can configure as many reminders as you would like by selecting the **+** button multiple times.
- If there is at least one rule configured and a user interacts with a job, the timer will be reset for any pending reminders. However, any previously-sent reminders will not be reset.
  - For example, say a job has reminders set for 1, 2, 3, and 4 days. A user interacts with the job on the 3rd day (reminders 1 and 2 have been sent out already). The user will not get a reminder after 1 or 2 days of inactivity, but will receive one after 3 additional days of inactivity (and then the 4th day of inactivity).
- If a user group's Default Member's jobs are configured to be sent to another user via **Out of Office** or **temporary transfer** and a People Queue node is configured to notify Unclaimed (which notifies the User Group's Default Member), The Default Member and the user selected in the transfer settings will both receive an email and an Inbox message.

To delete a reminder, select the trash can icon.

People User

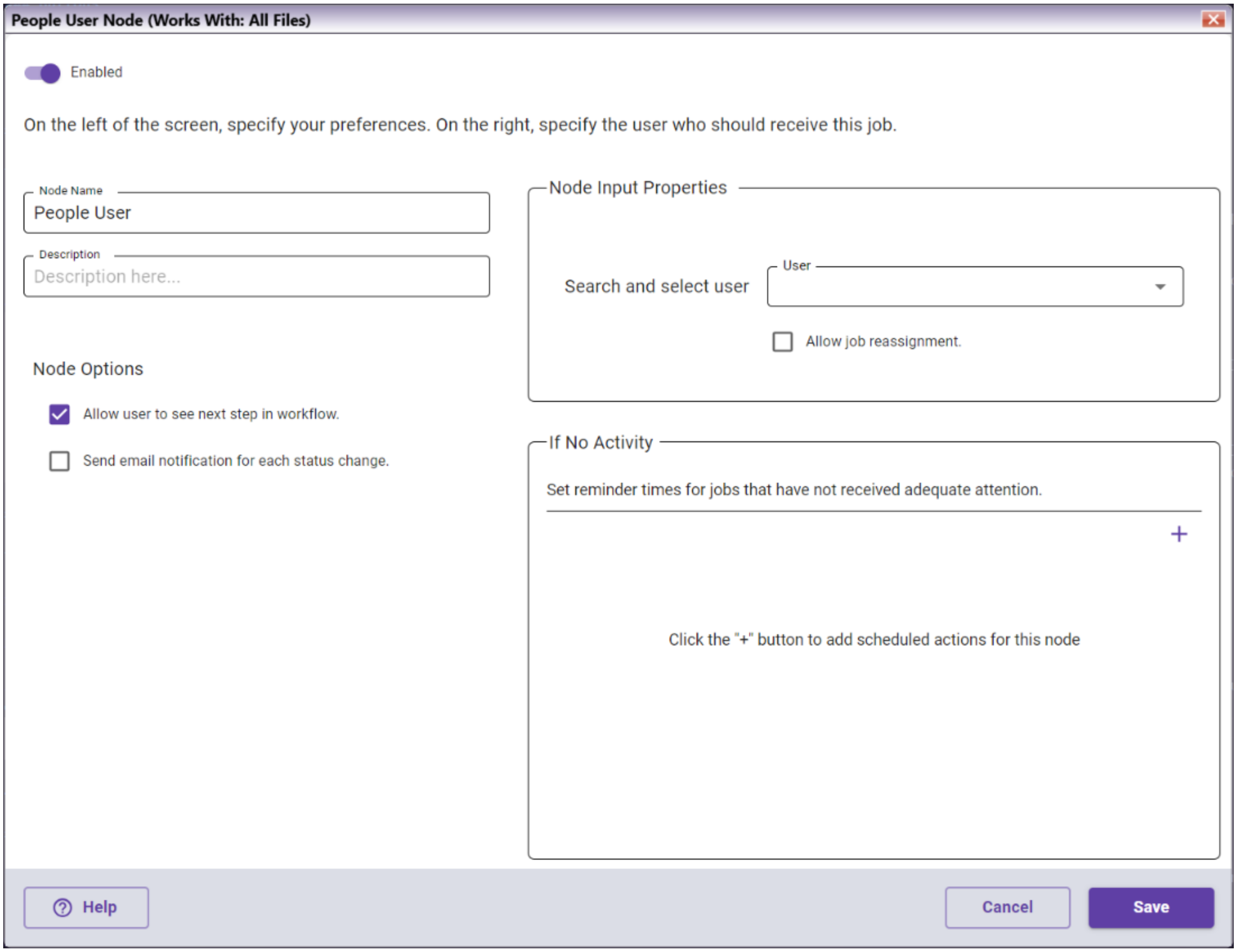
Use the People User node to send jobs to a licensed Dispatcher Stratus User. The job may be reassigned, depending on workflow configuration. The People User node is designed for jobs that are intended to be completed by the recipient, typically an individual with specialized skill or authority. Common uses for the People User node include:

- Final checks/approvals
- Tasks that require job-specific input, such as photography, proofreading, etc.

For more information about how People nodes function in workflows, see the **Building a Workflow with People Nodes** section and the **Interacting with Workflows** page.

To open the People User node's configuration window, add a People User node to your workflow and double-click on it.

Configuring the People User 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, the workflow will ignore it. While the workflow will still validate, jobs and documents will pass along all Normal and User-Selectable connections configured from this node. Error and Negative connections will be ignored.
- **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.

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.

Activate Response Options

There are several options available in the People User node that allow the job's owner to understand the status of the workflow.

- Allow user to see next step in workflow - Selecting this option allows the job owner to see what the next step in the workflow is before completing their assigned job.
- Send email notification for each status change - When this option is selected, Dispatcher Stratus will send an email to any previous owners of a job (not the user currently performing the action). This option has no effect on job notifications within Dispatcher Stratus.

  For example, if User A reassigns a job to User B, User A will get an email when User B accepts the job. Then, if User B reassigns the job to User C, User A will get an email that the job has been reassigned, and both User A and User B will get emails when User C accepts the job. If user C then completes the job, Users A and B will get emails saying the job is complete.

  Notes:

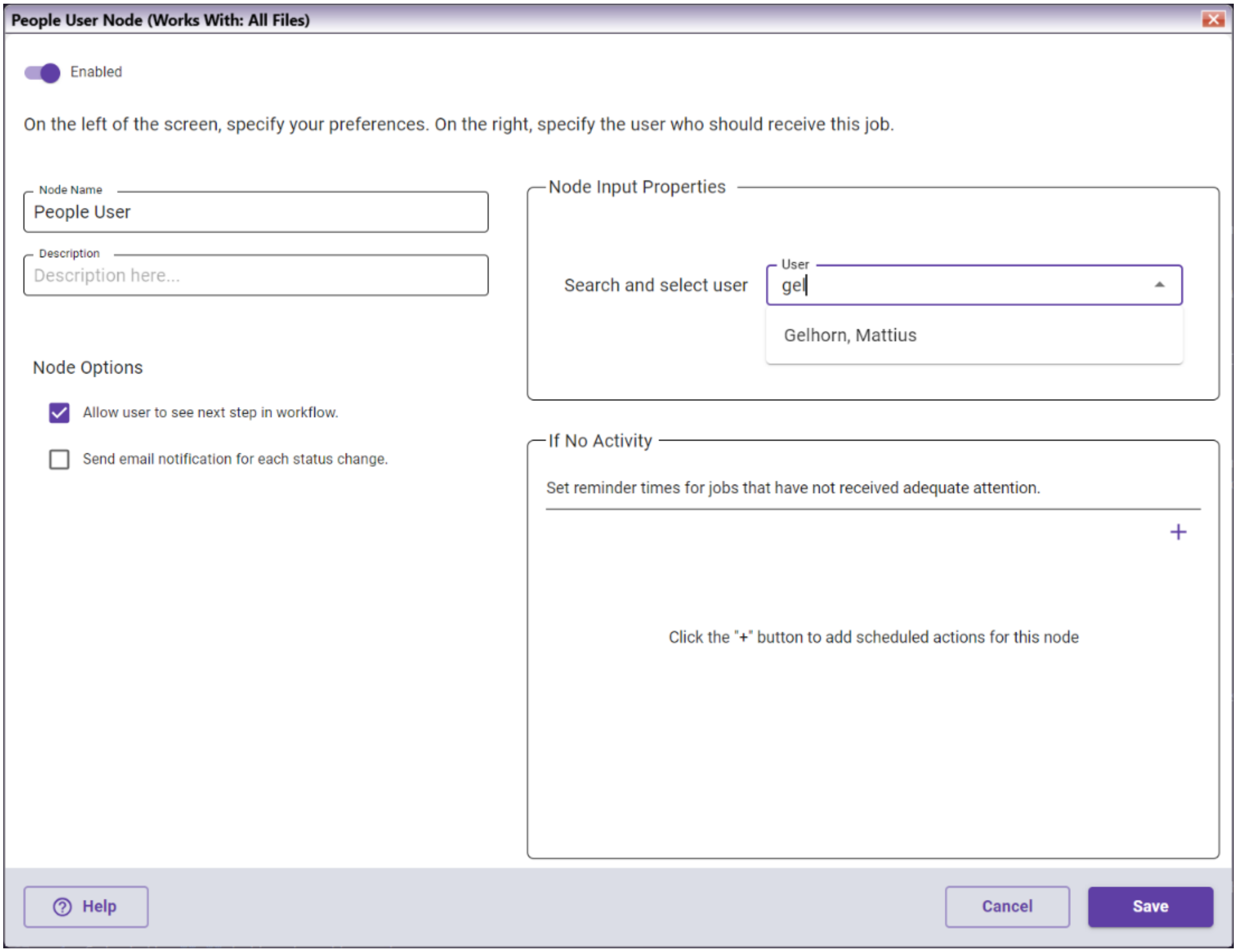
  - Selecting this option does nothing if the “Allow job reassignment” option (below) is not also enabled.
  - This option is node-specific. Every past job owner (except the current owner taking the action) will receive an email for each action until the job passes to the next node, but will not receive further emails as the job progresses through the workflow. Similarly, users will not receive emails for actions taken in previous nodes.

Selecting a User

Within the People User node, you can type the name of a user you would like to send documents and jobs to or you can search.

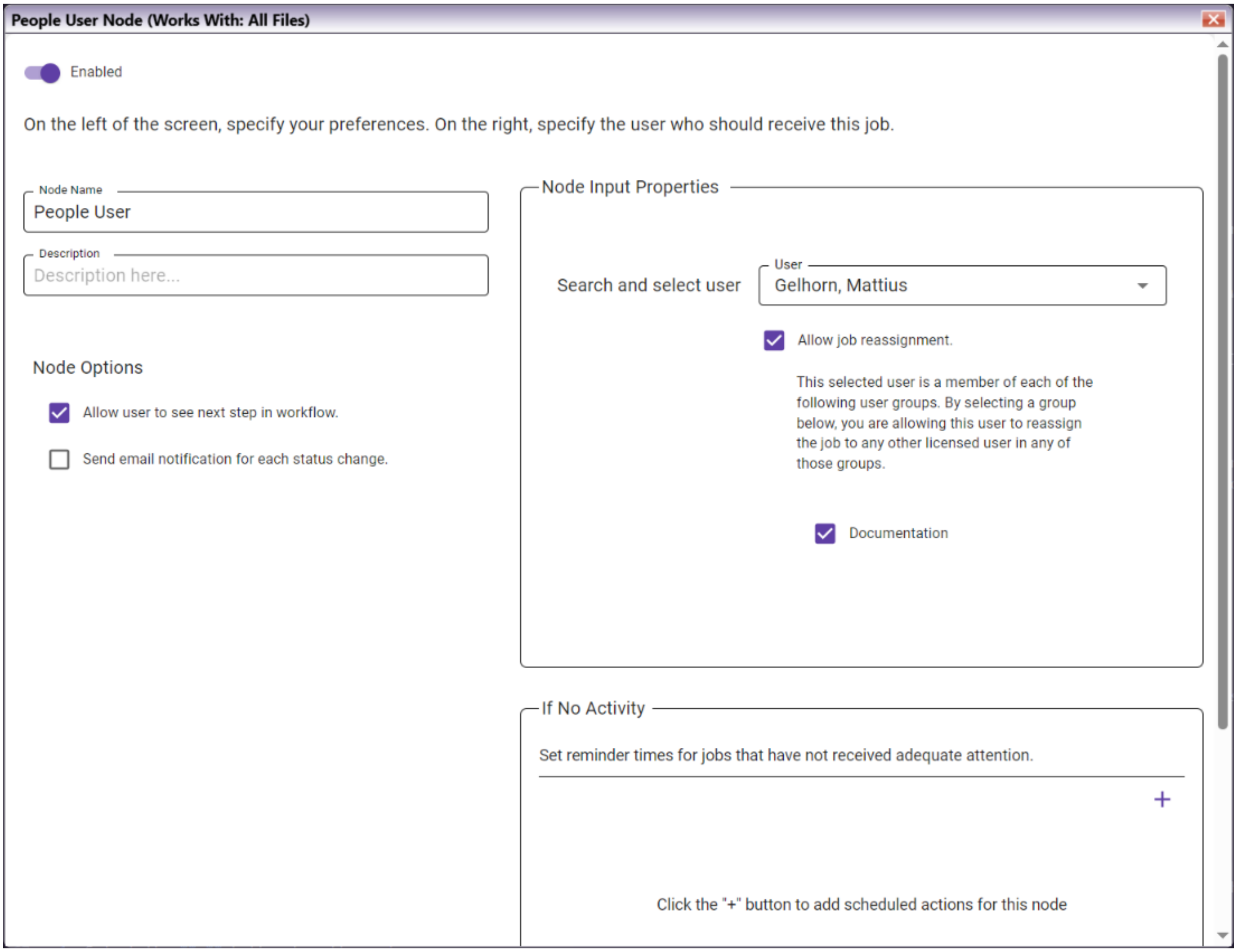
To use the search feature, do the following:

1. Click in the **User** field.
2. Enter your search term.
3. After a moment, the search results for the search term will appear, as in the following illustration:



Note: Only licensed users will appear as search results.

4. Click on the user you would like.
5. Select whether jobs assigned to this user will have the option to be reassigned. Then, you will be provided with a list of the **User Groups**. The user will be able to reassign the jobs from this workflow to any user who is also a member of the selected group.



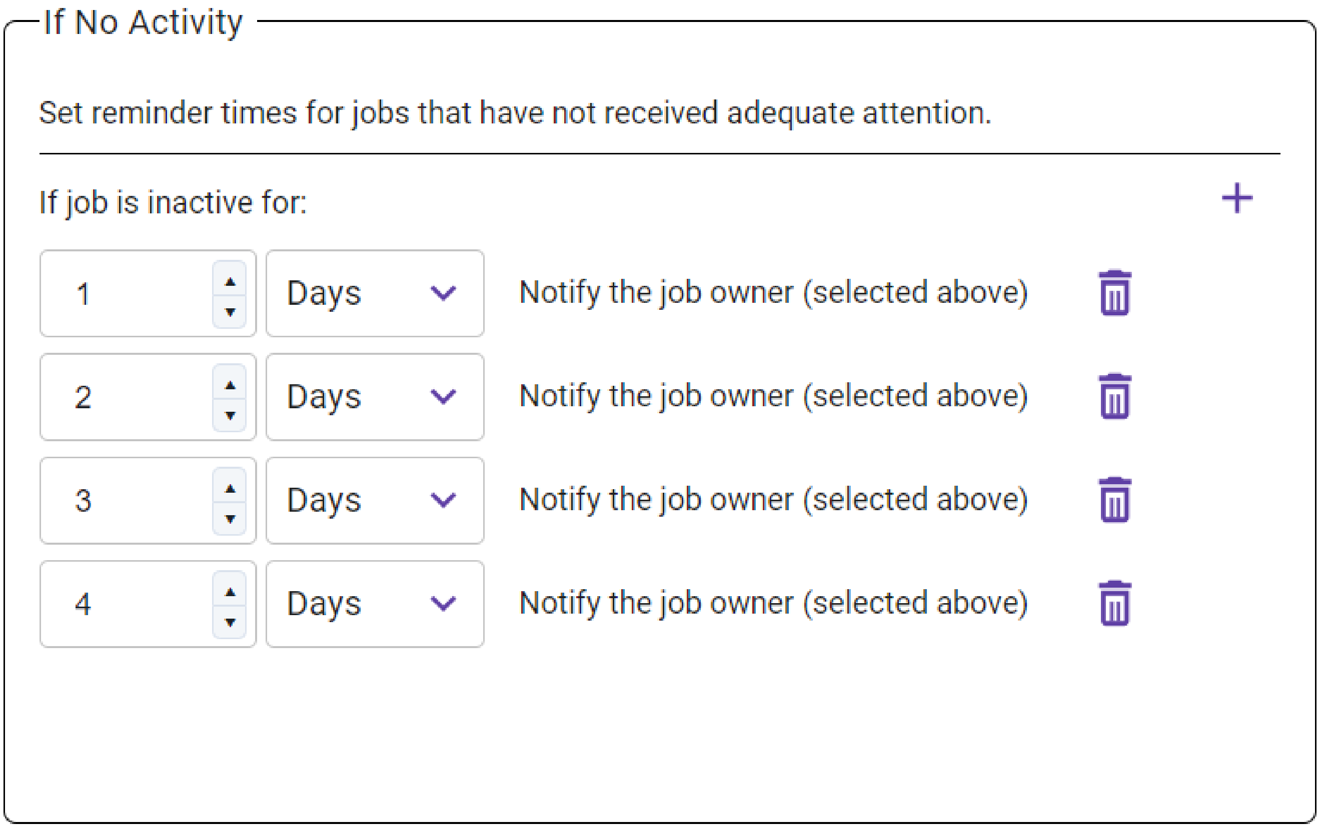
6. Click the Save button to save the configuration and close the node.

Activity Reminder

In the “If No Activity” section, you can set reminders for the user assigned to jobs from this node. After a specified amount of time, the owner of the job will recieve an inbox notification and an email reminding them of their task. To configure the activity reminder, do the following:

1. Select the **+** button to add a rule.
2. Select the **Time** and **Time Frame** for the notification.

- For example, if you would like the user to be notified after 24 hours of inactivity, you could select:
  - “24” in the Time field and “Hours” in the Time Frame field.
  - “1” in the Time field and “Days” in the Time Frame field.



Notes:

- You can configure as many reminders as you would like by selecting the **+** button multiple times.
- If there is at least one rule configured and a user interacts with a job, the timer will be reset for any pending reminders. However, any previously-sent reminders will not be reset.
    - For example, say a job has reminders set for 1, 2, 3, and 4 days. A user interacts with the job on the 3rd day (reminders 1 and 2 have been sent out already). The user will not get a reminder after 1 or 2 days of inactivity, but will receive one after 3 additional days of inactivity (and then the 4th day of inactivity).

To delete a reminder, select the trash can icon.

Distribution Nodes

Connectors

Third-Party Connectors

A connector node is a distribution node that connects Dispatcher Stratus to a third-party application. These connector nodes require an account with the third-party application to properly distribute files. Connectors include:

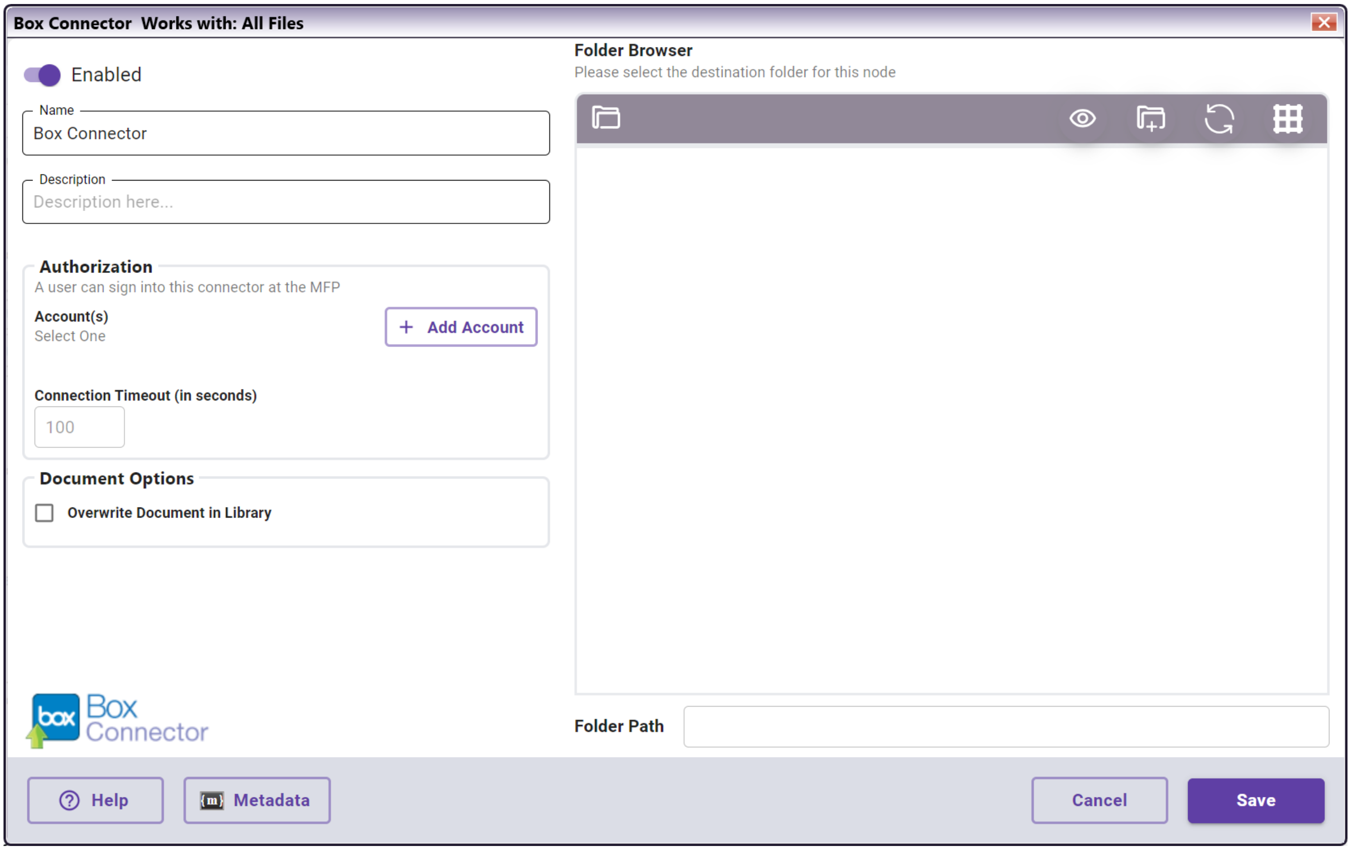
- **Box**
- **Paragon Cloud Fax**
- **Dispatcher Phoenix**
- **Dropbox**
- **Google Drive**
- **OneDrive**
- **OneDrive for Business**
- **SharePoint Online**
- **Square 9 Softworks**
- **Upland InterFAX**
- **WebDAV**

Important! When creating your workflow, make sure that your distribution nodes are enabled. If files are sent to a disabled distribution 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.

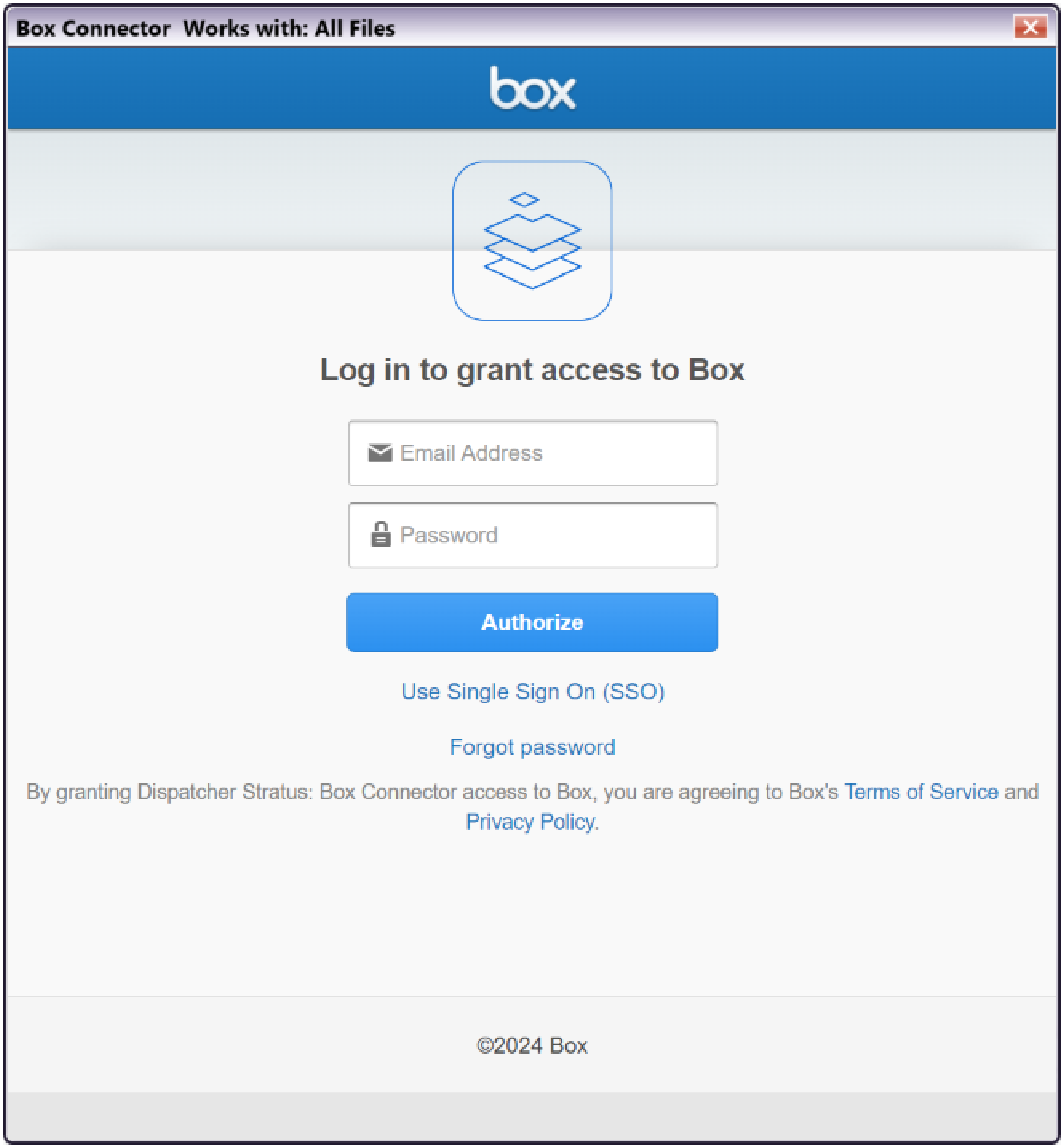
Buttons

- **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.

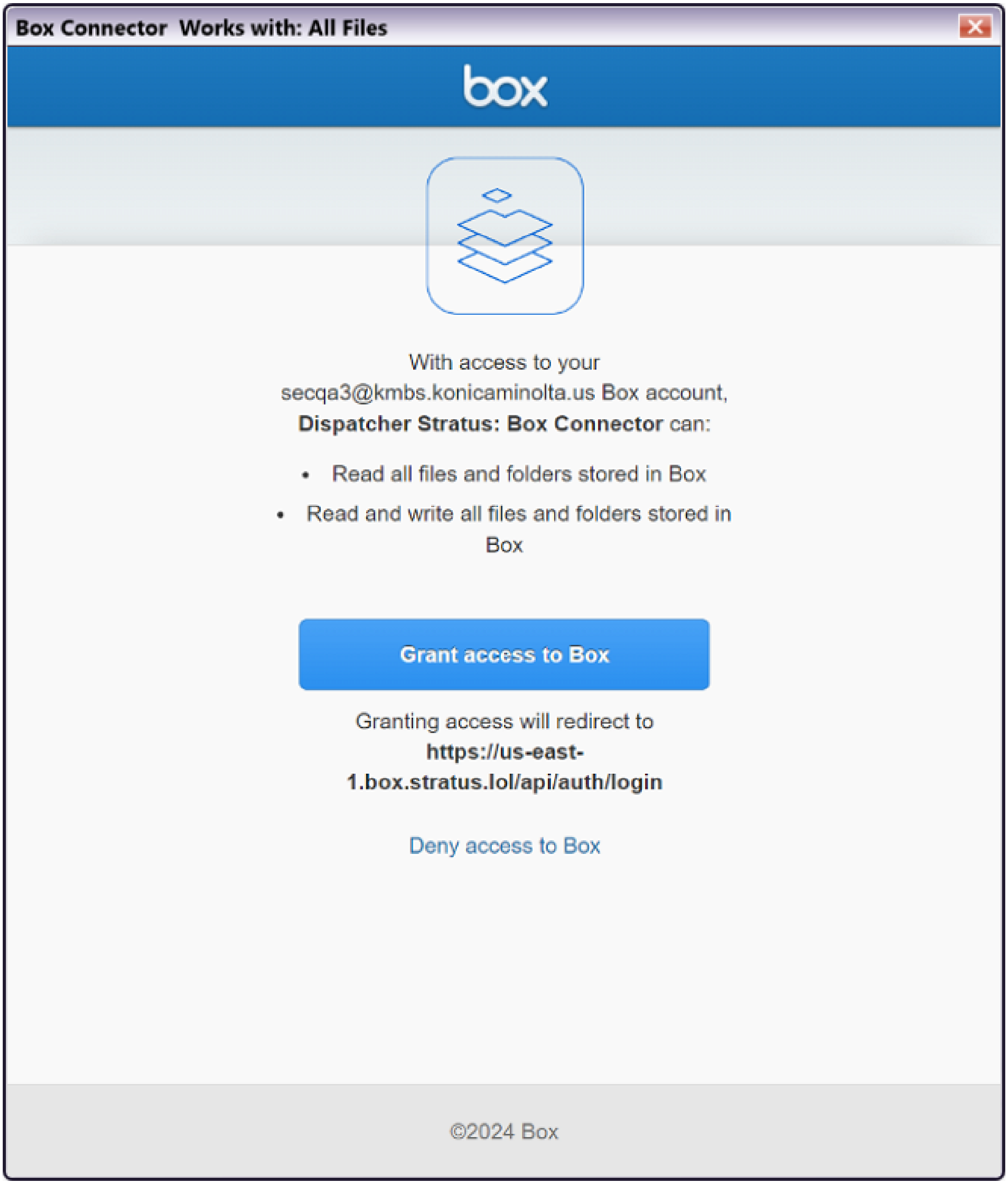
Authorization

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:



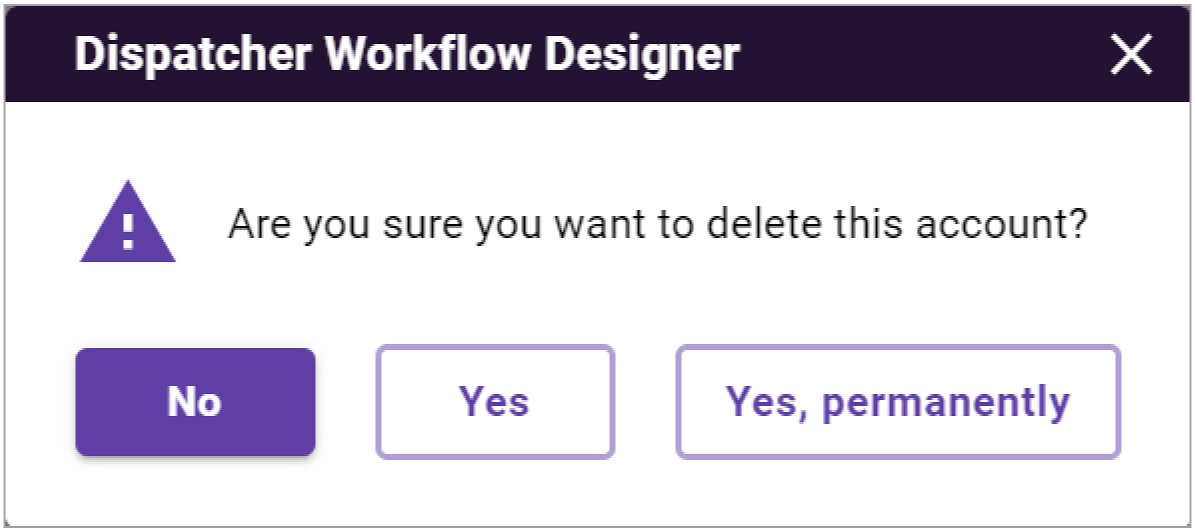
3. Either confirm you want to give Dispatcher Stratus access to your Box account, or select **Deny access to Box** to exit the window. You return to the Box Connector.

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.

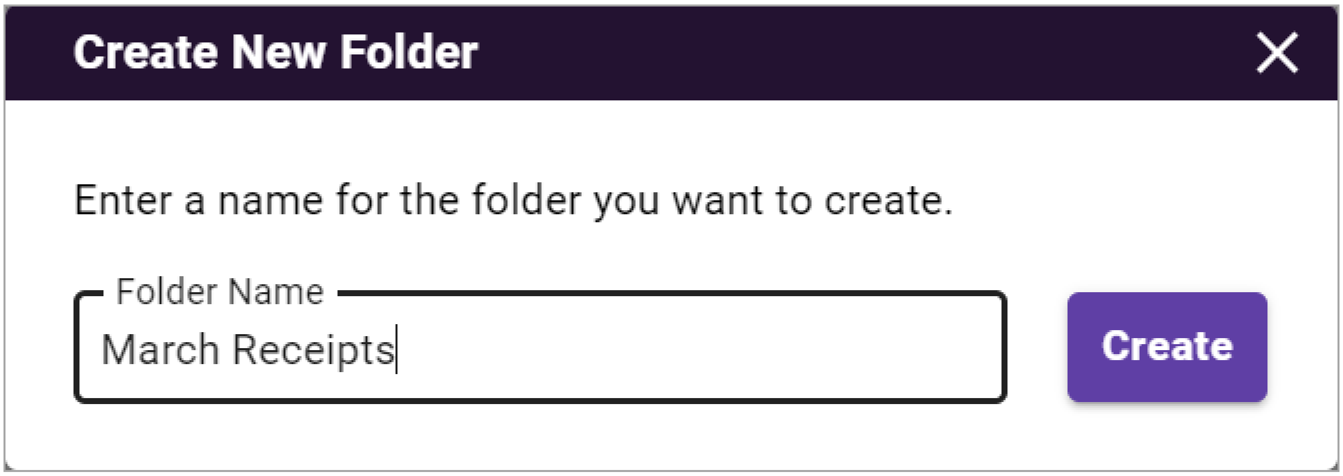
Note: The file will have an icon next to the file name with a number representing the number of times that file has been uploaded. Selecting that icon will show the other versions of that file. This functionality is only available from Box with an account level of “Pro” and higher. Standard Box account 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.

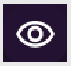
File and Folder Name Restrictions

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.

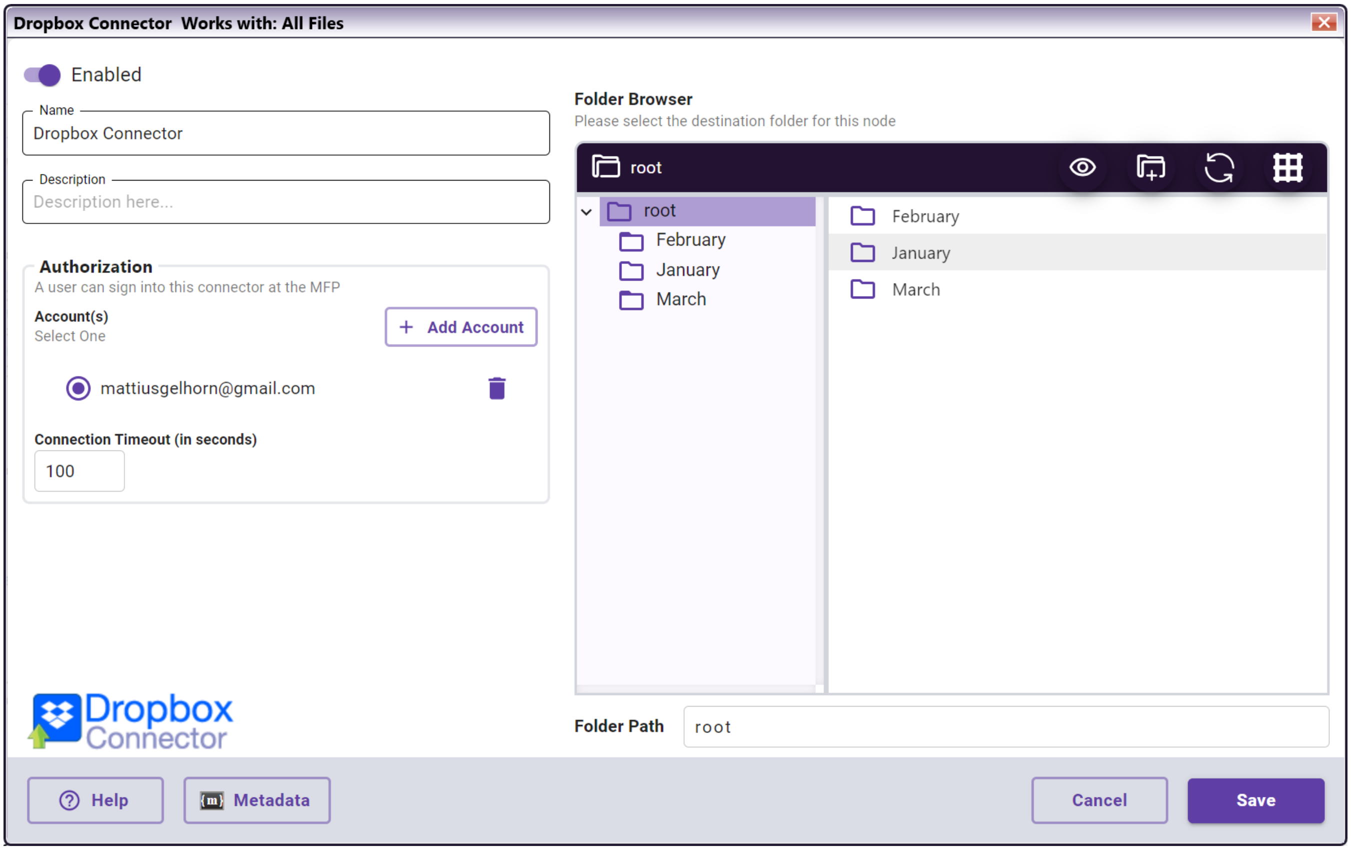
Dropbox Connector

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.

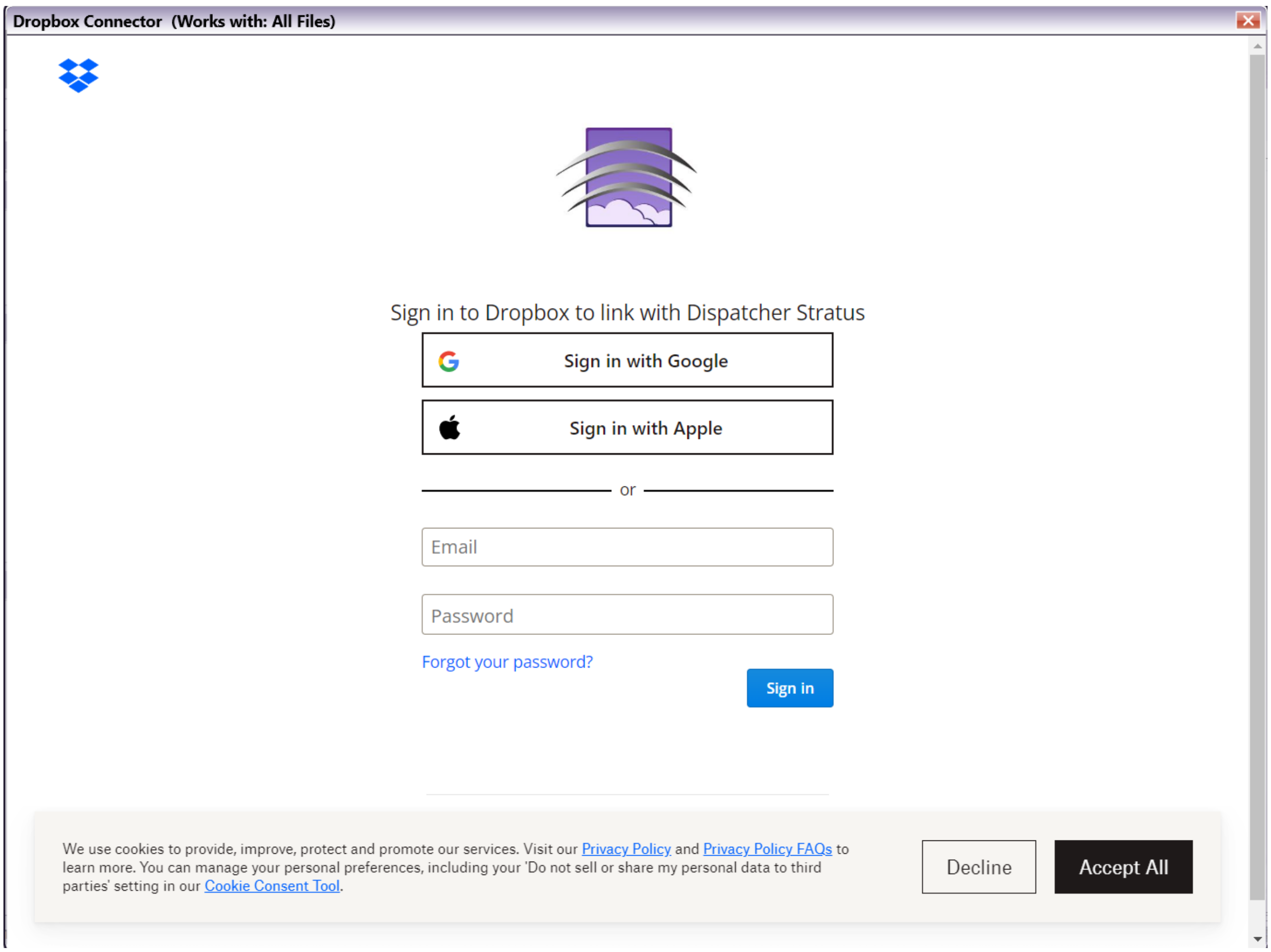
Buttons

- **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:



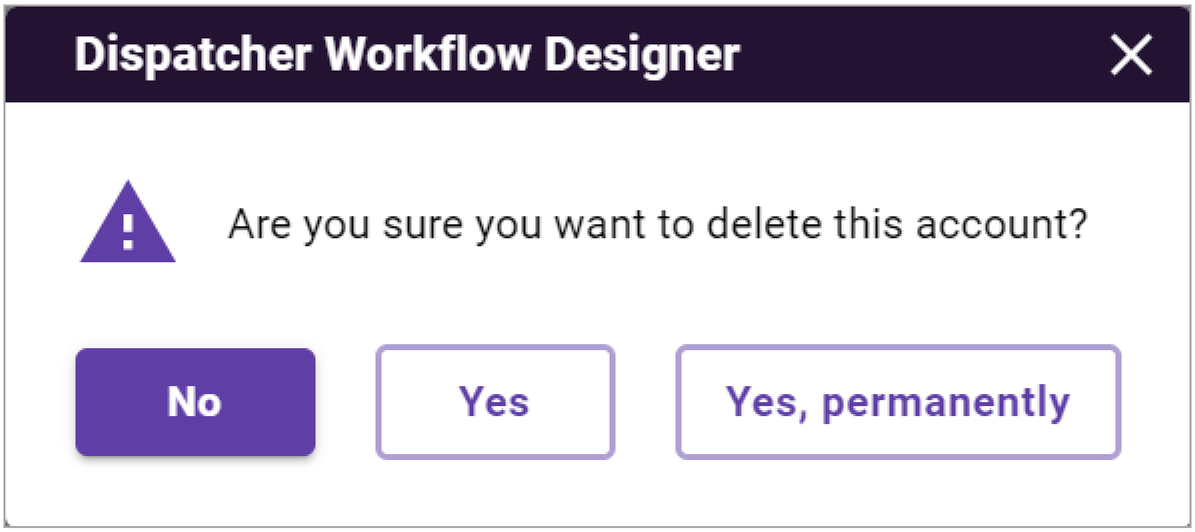
2. Enter the login information for the Dropbox account. Note that the Dropbox Connector also supports Google and Apple logins. Then, select **Sign In**. You return to the Dropbox Connector.

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.

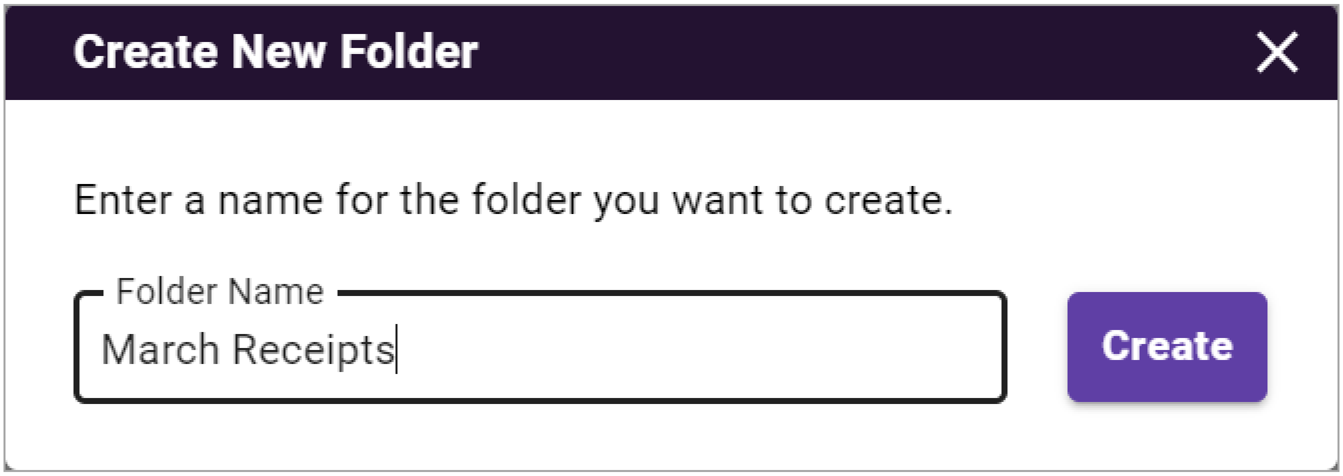
The following folder types may appear in the Dropbox Explorer area, depending on your Dropbox version:

- 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.

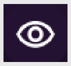
File Name Restrictions

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:

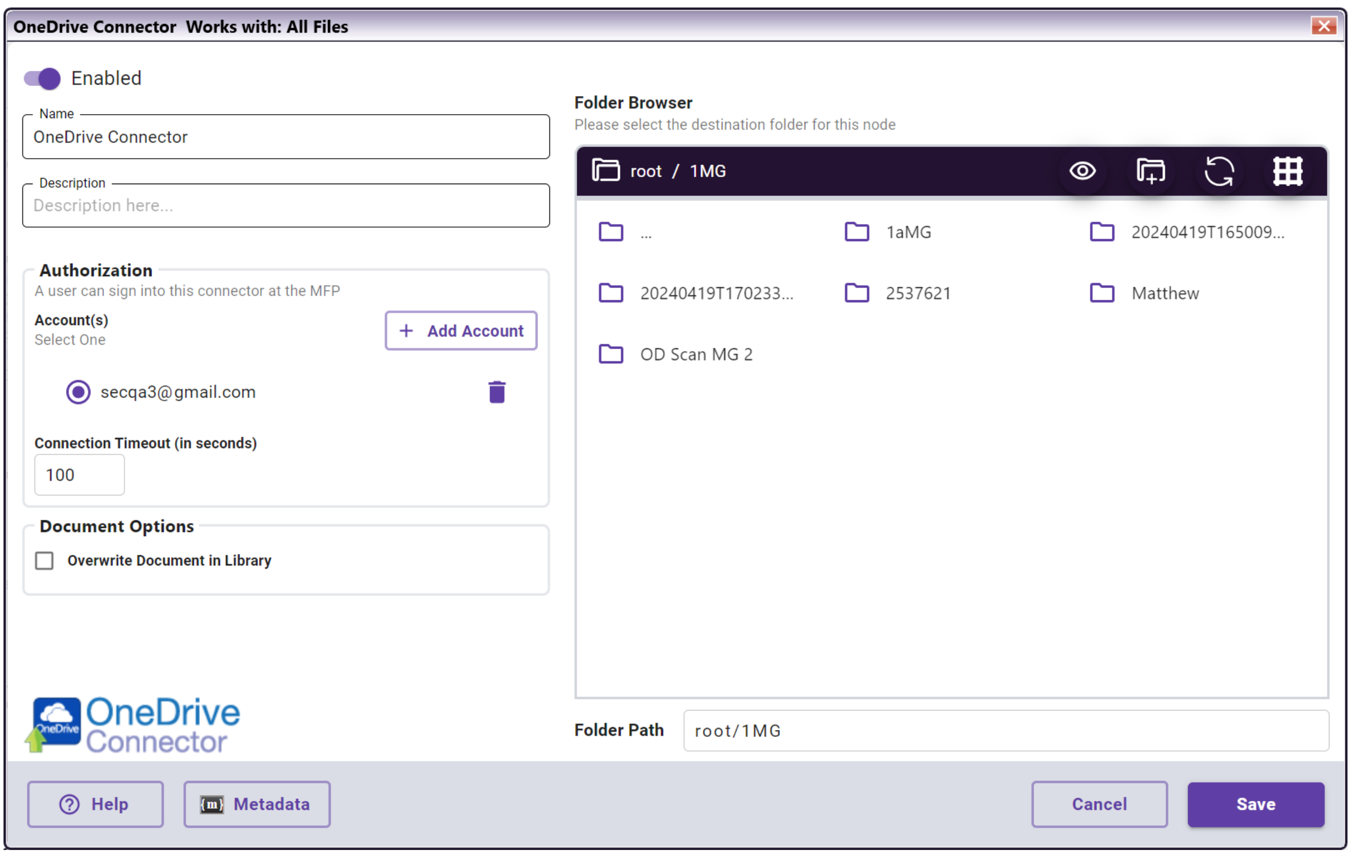
1. **Select your workflow** - If only one Dispatcher Stratus workflow is currently running, that workflow appears. If multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Available options are determined 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.

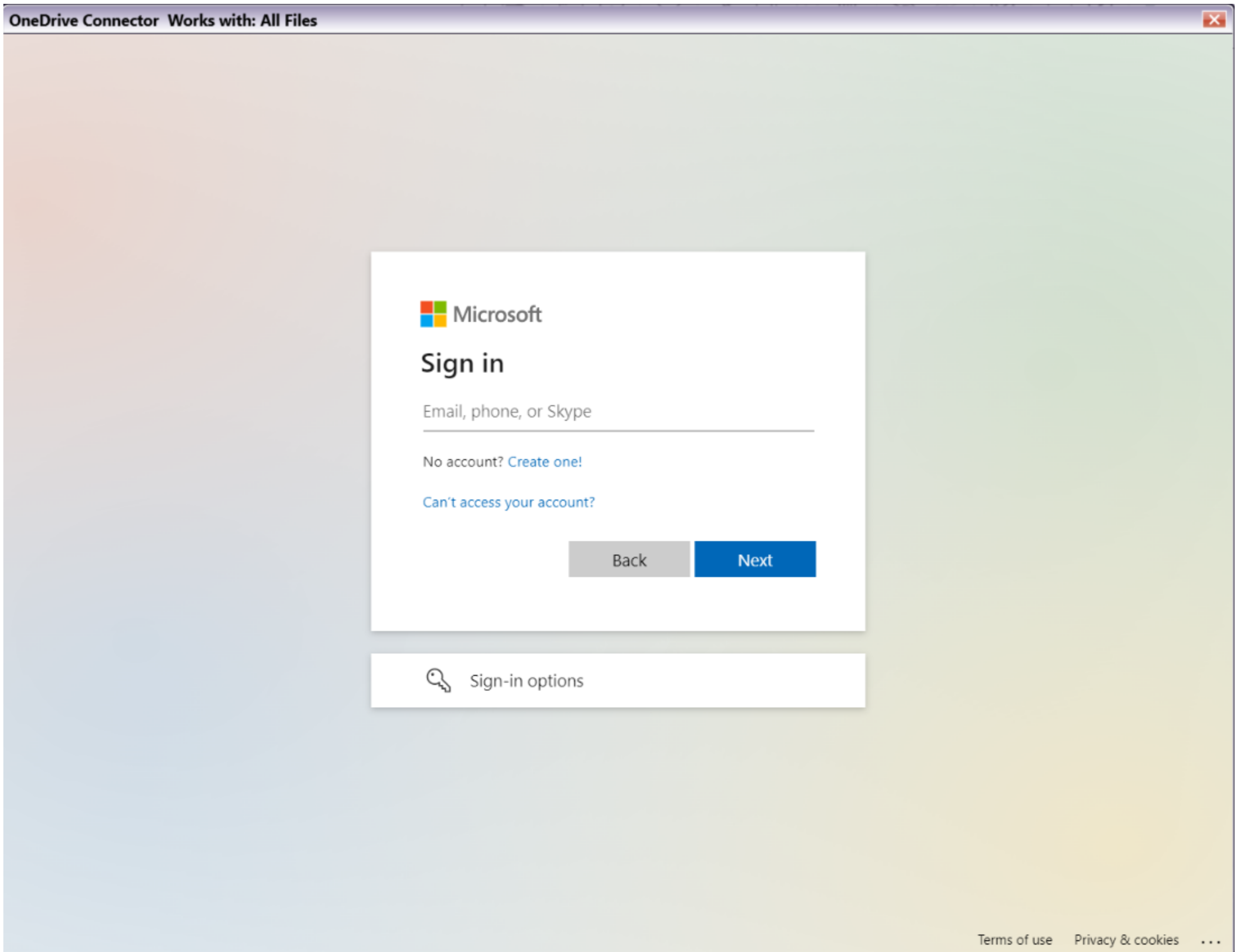
Buttons

- **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.

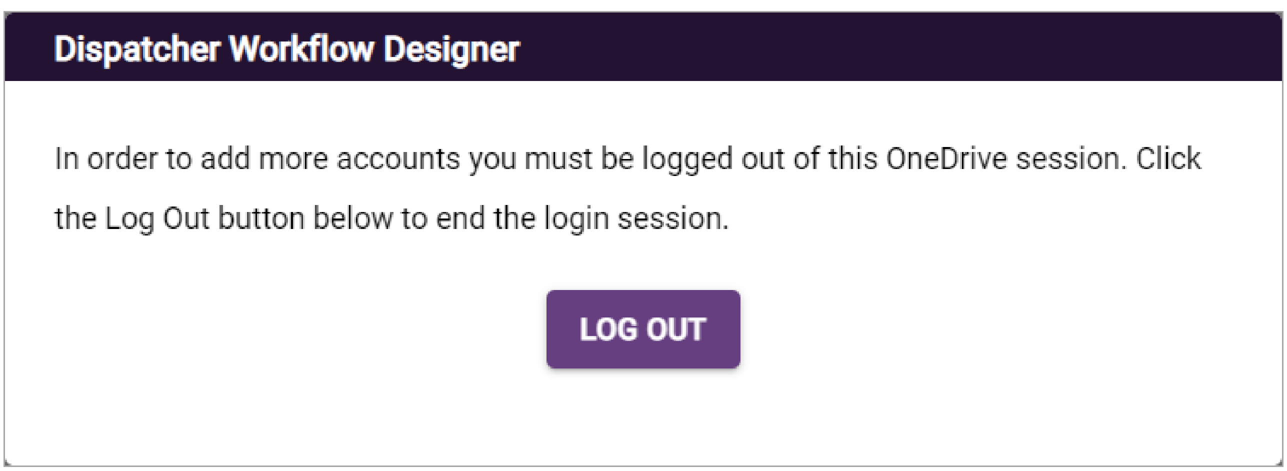
Authorization

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.

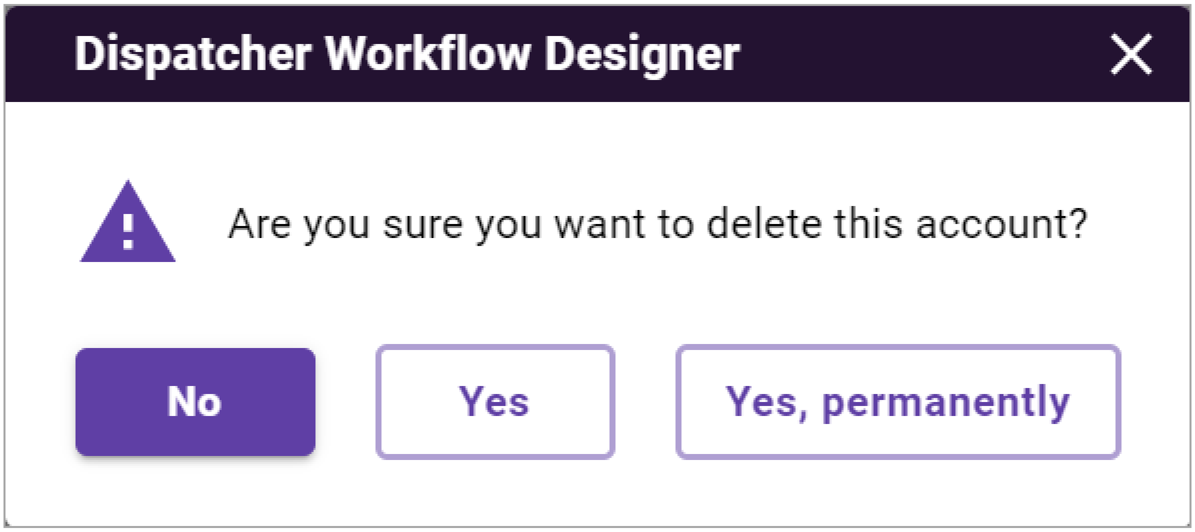


Note: You can add only one OneDrive account per session. To add another OneDrive account, you must save the node and reopen it.

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.

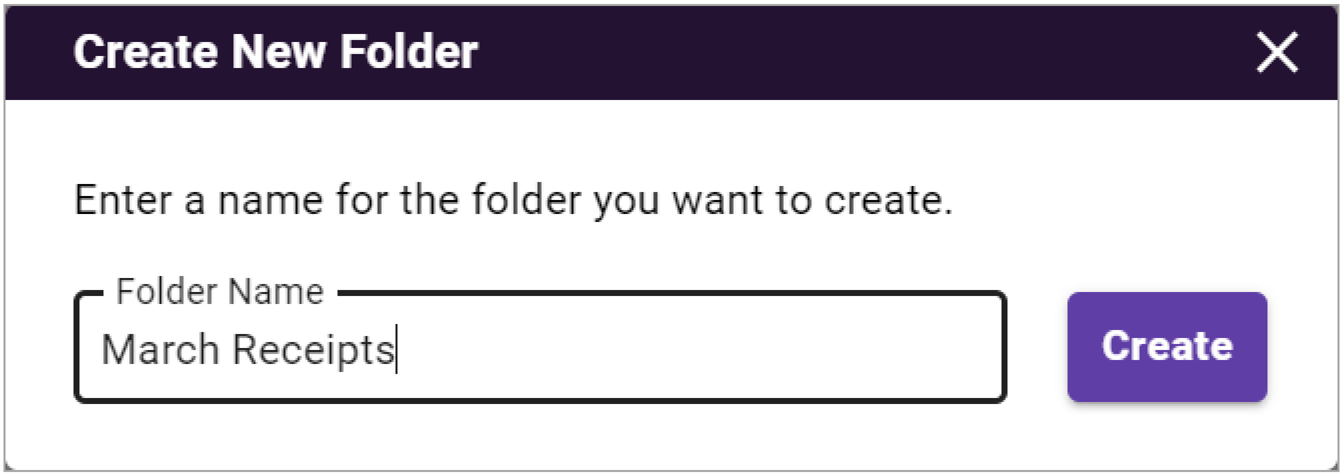
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to OneDrive with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both 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.

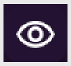
File and Folder Name Restrictions

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:

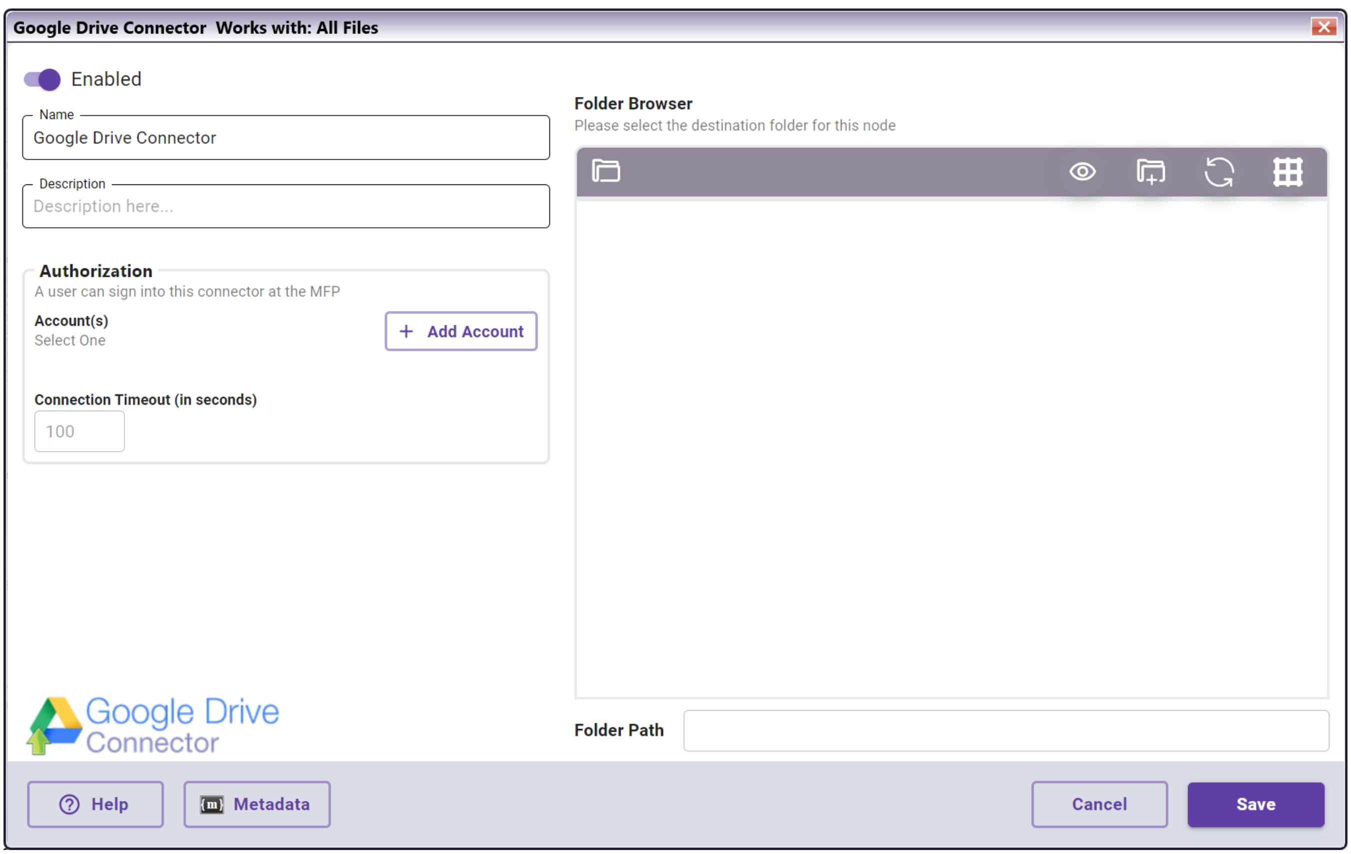
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. If multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Scan your document** - Use the MFP to scan your document. Available options are determined by your selections 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

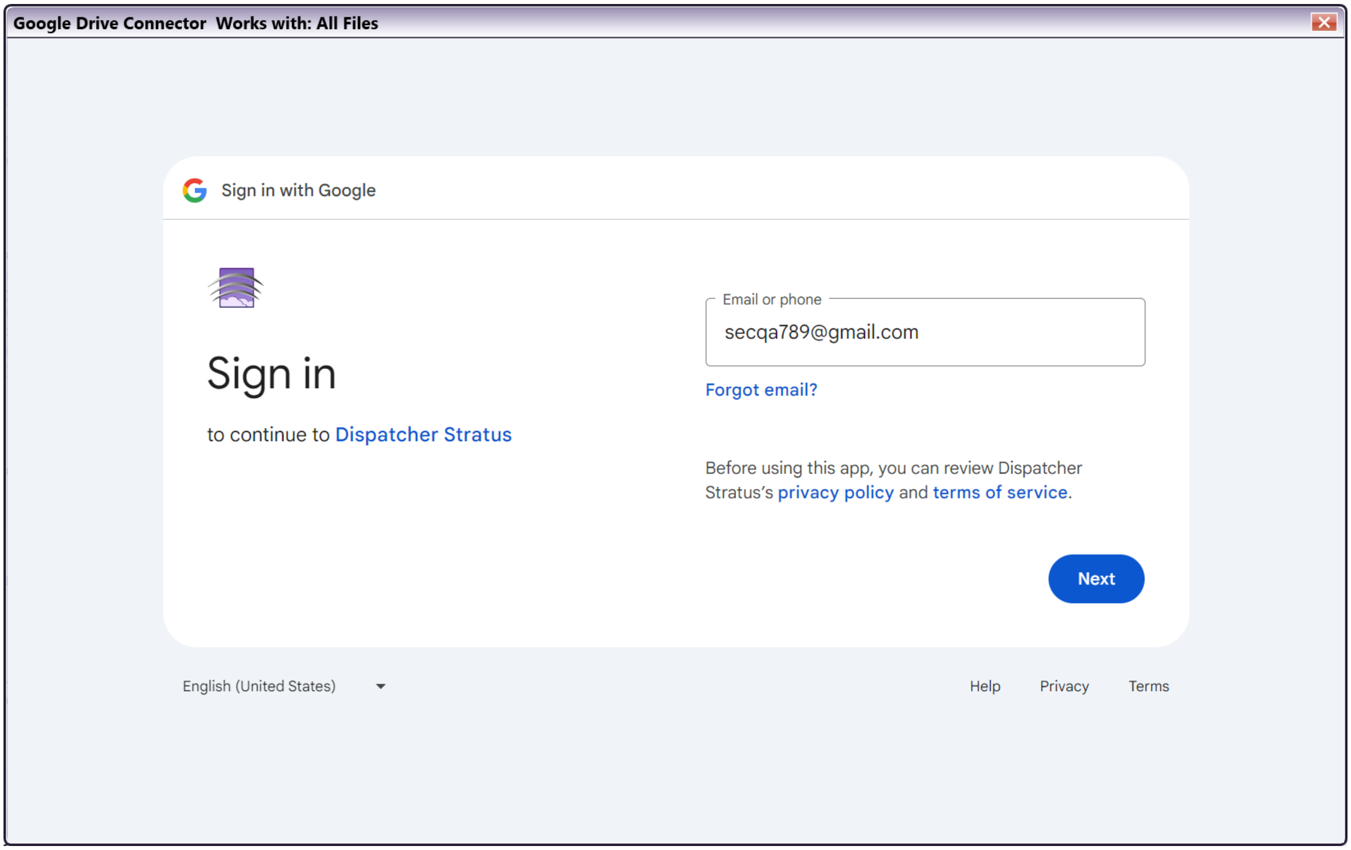
- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

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:

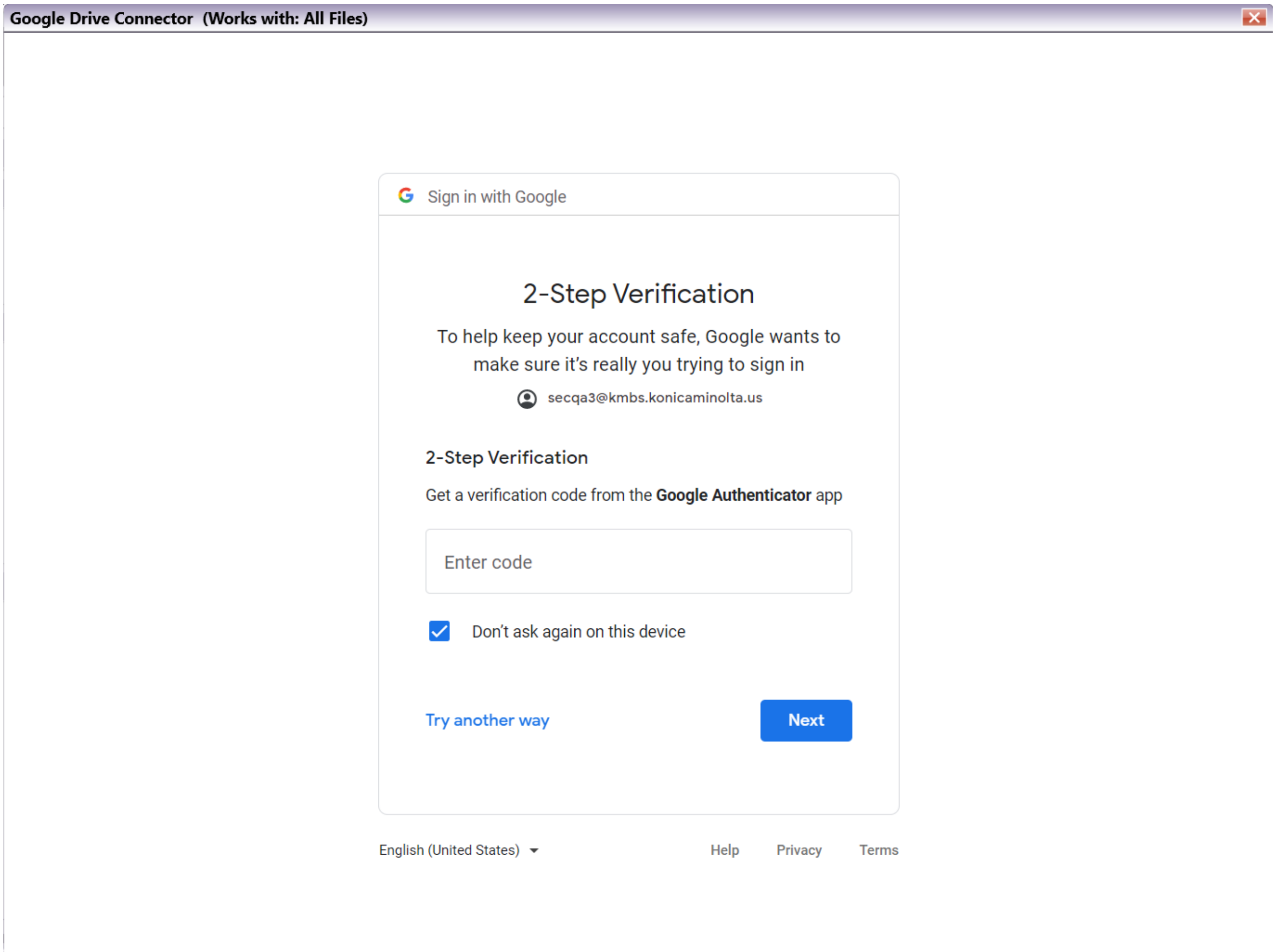
To connect to Google Drive, do the following:

1. Select **Add Account**. The Google Drive login window appears:



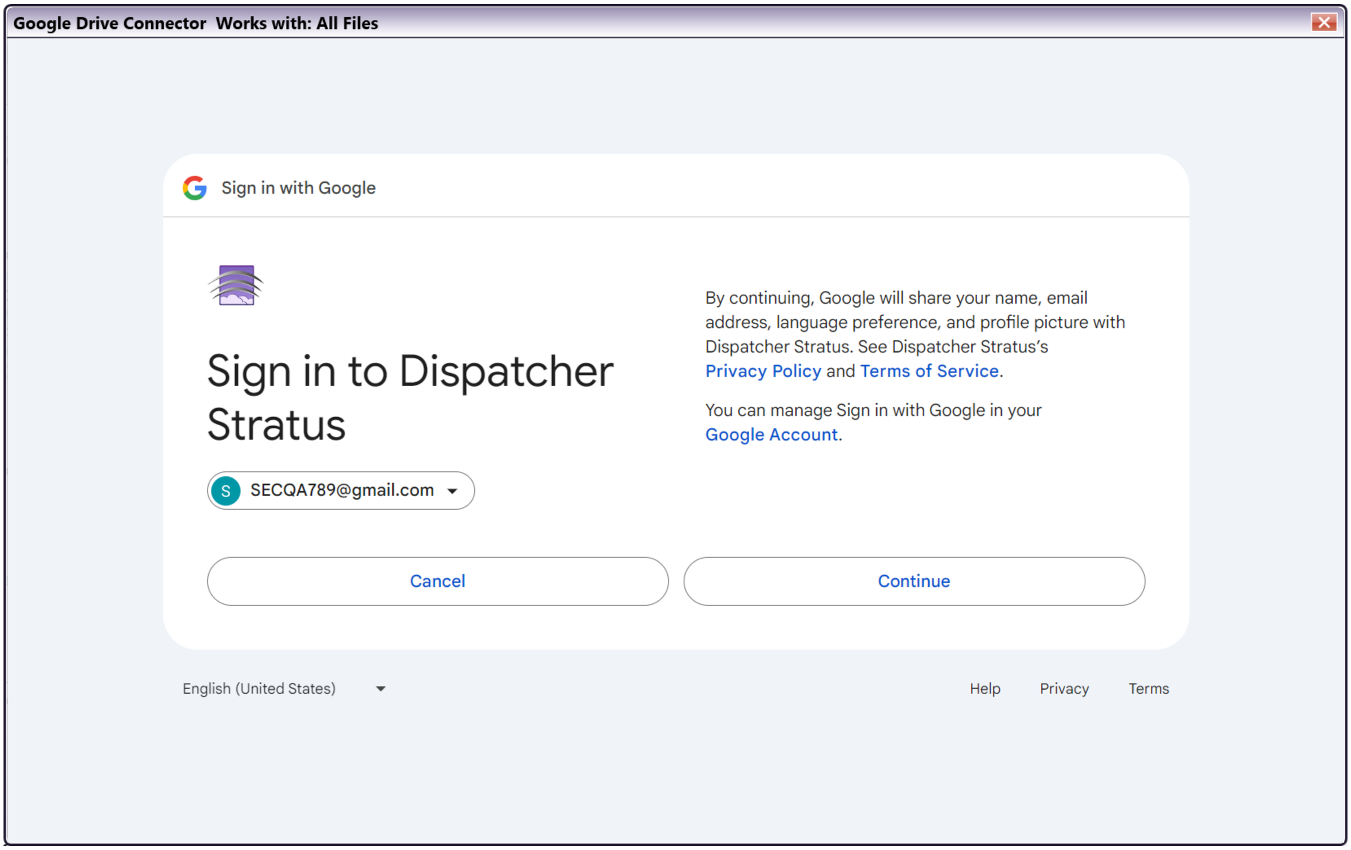
2. Enter the login information for the Google Drive account. Then, click **Next**.

3. If 2-Step Verification is configured for the account, enter the 2-Step Verification Code.

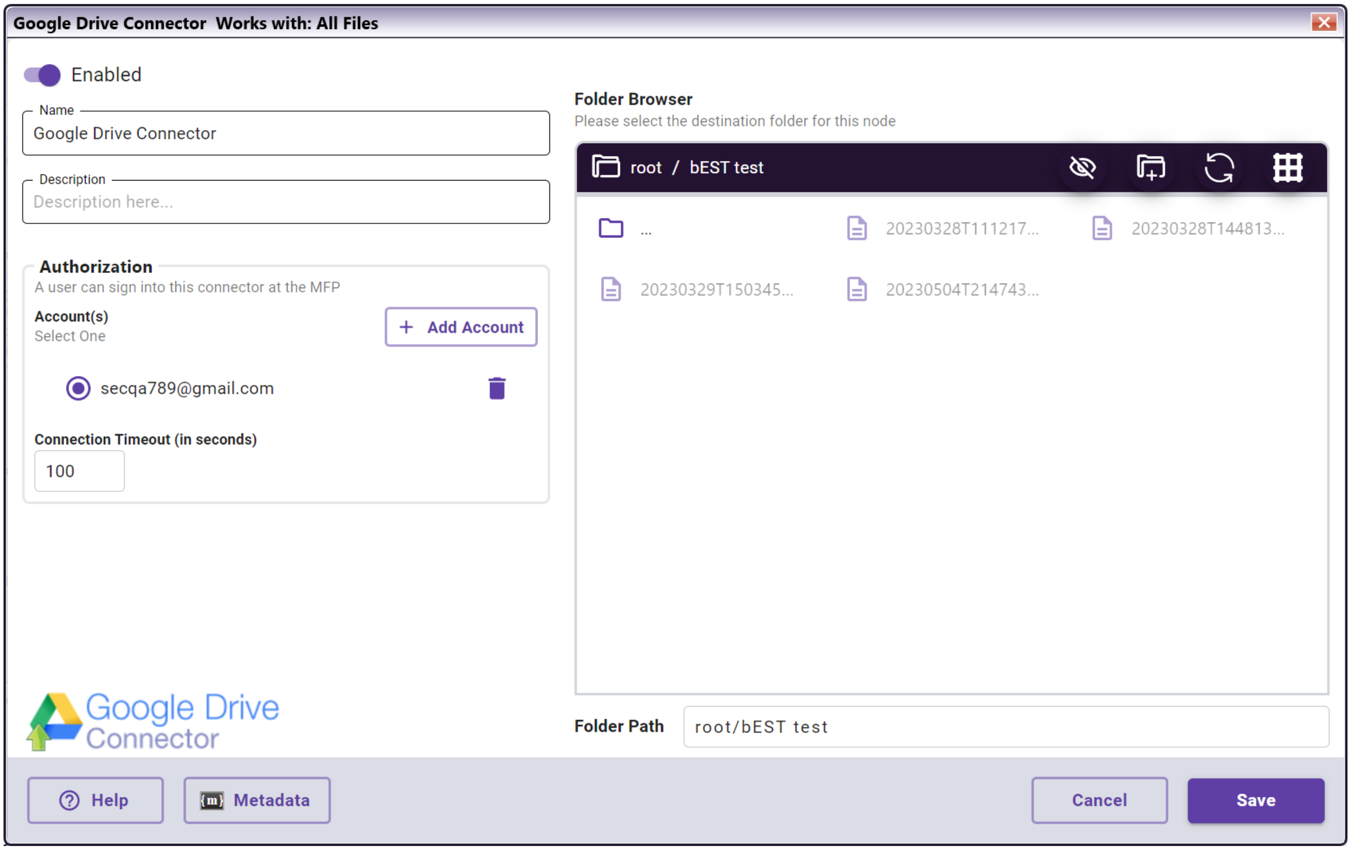


Note: You may be prompted a second time to give Google Drive permissions. If prompted, select all boxes to give the node access to your Google Drive account. Click **Continue** again.

4. To grant Dispatcher Stratus access to your Google Drive account, select **Continue**.



You return to the Google Drive Connector.



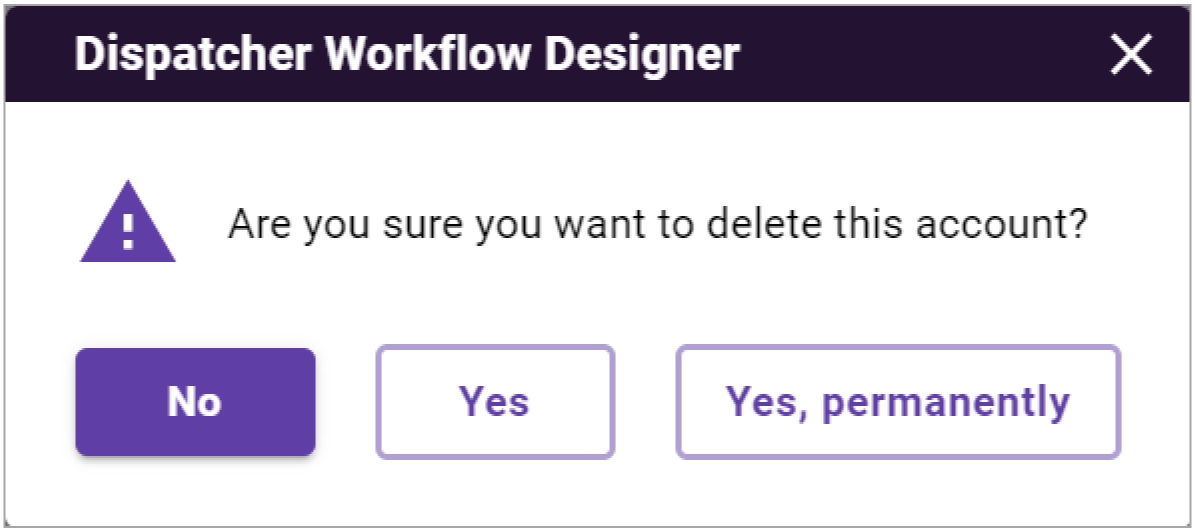
5. If multiple accounts are available, select the radio button next to the desired account.

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:

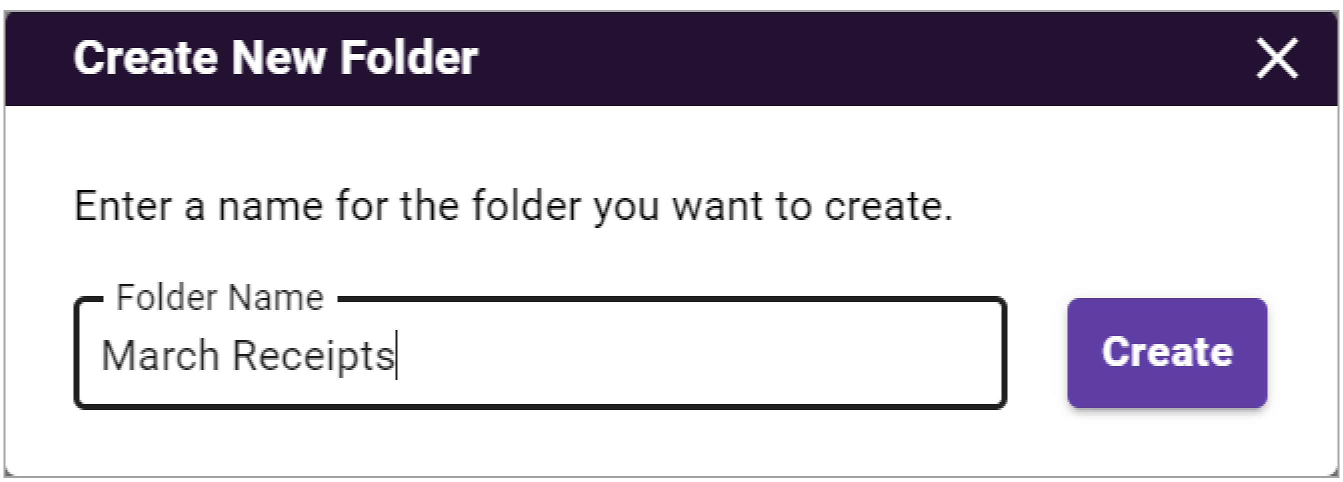


- **No** - Cancel the delete action and return to the node configuration window.
- **Yes** - Delete the account from this node. You can add the account again later.
- **Yes, Permanently** - Delete the account from the tenant, including all workflows. You can add the account again later.

  Caution! Selecting this option can impact workflow performance.

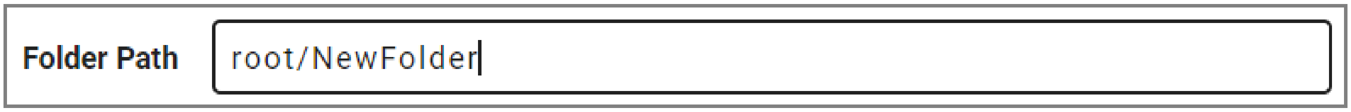
Sending Documents to a New Folder

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 < > : " / \ | ? * .

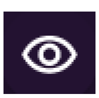
Folder Name Restrictions

While Google Drive does not have many restrictions on folder naming, there are some characters that are not compatible with how Dispatcher Stratus creates folders, which can cause node validation errors with folder names that Google Drive finds acceptable. These characters are:

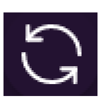
- Back slash \ and forward slash /

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

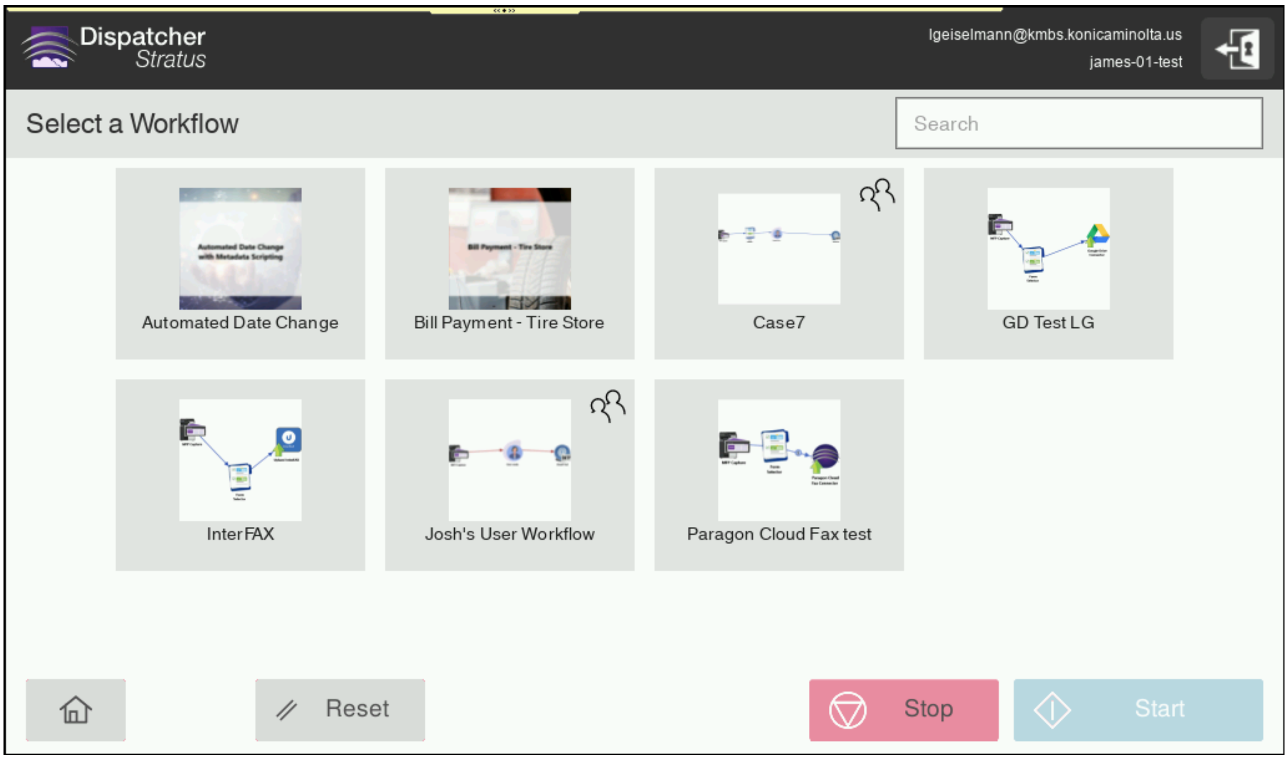
  folders/files.

- **Change View**: Click this button to change from list view to grid view and back.

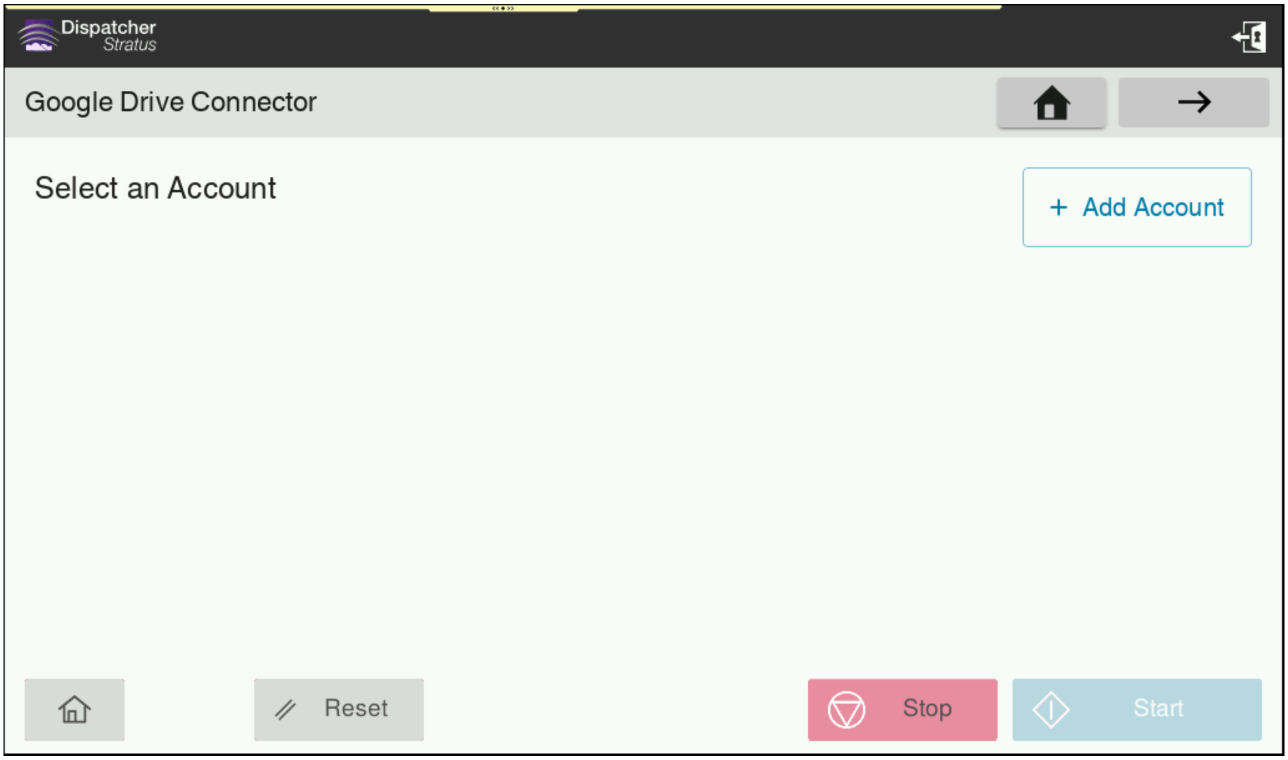
Accessing Google Drive on MFP

At the MFP, take the following steps:

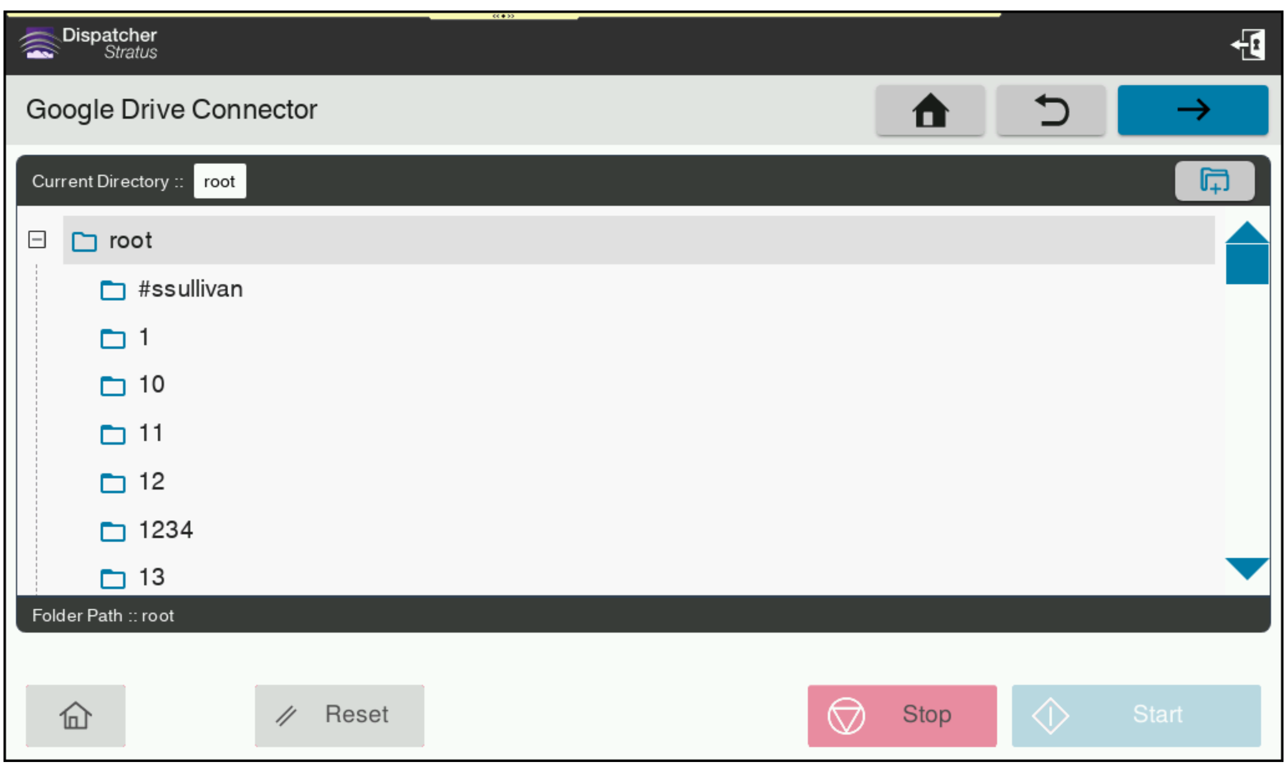
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow. See the following illustration:



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:

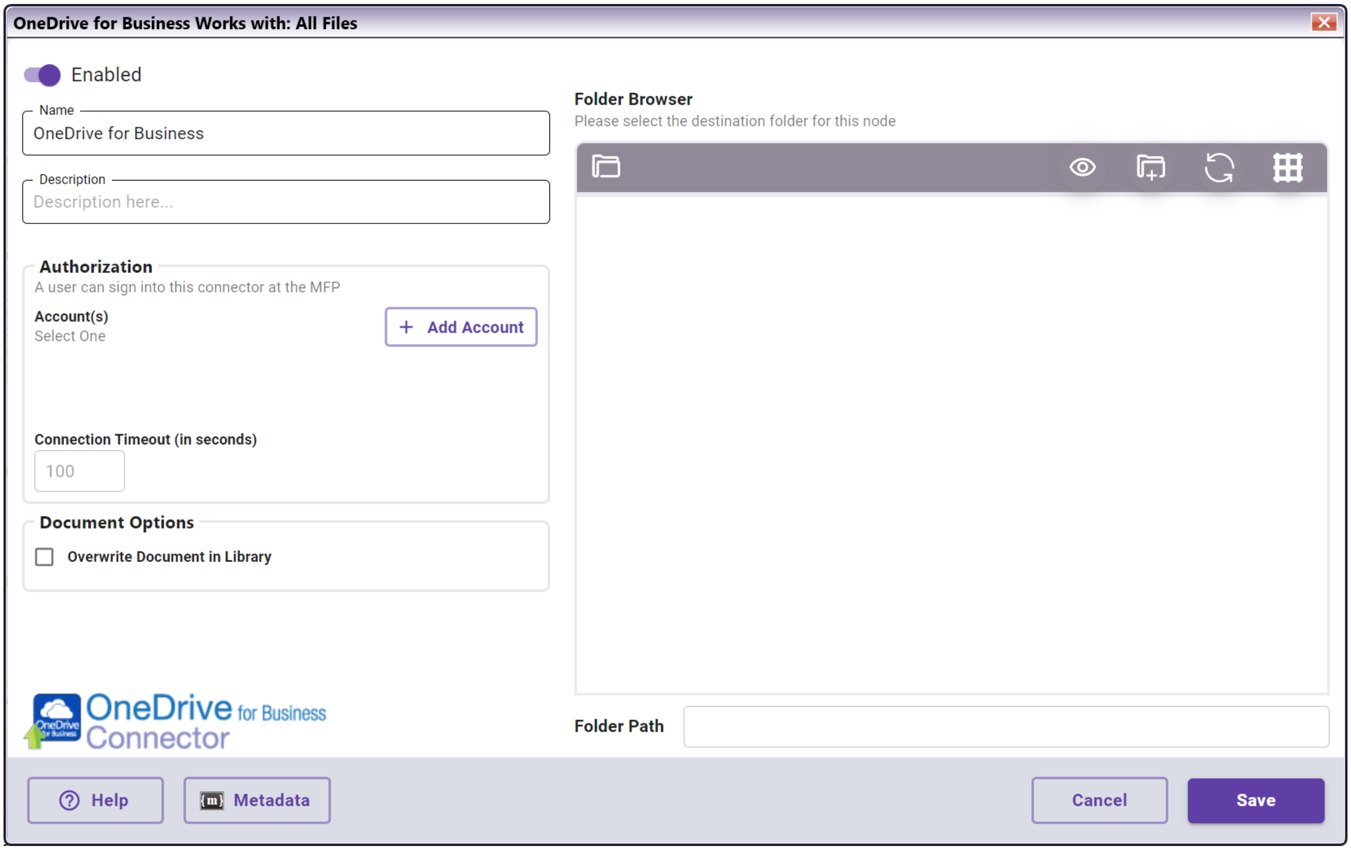


5. **Select the “Scan” button** - This sends the scanned document to the selected Google Drive account and folder.

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.

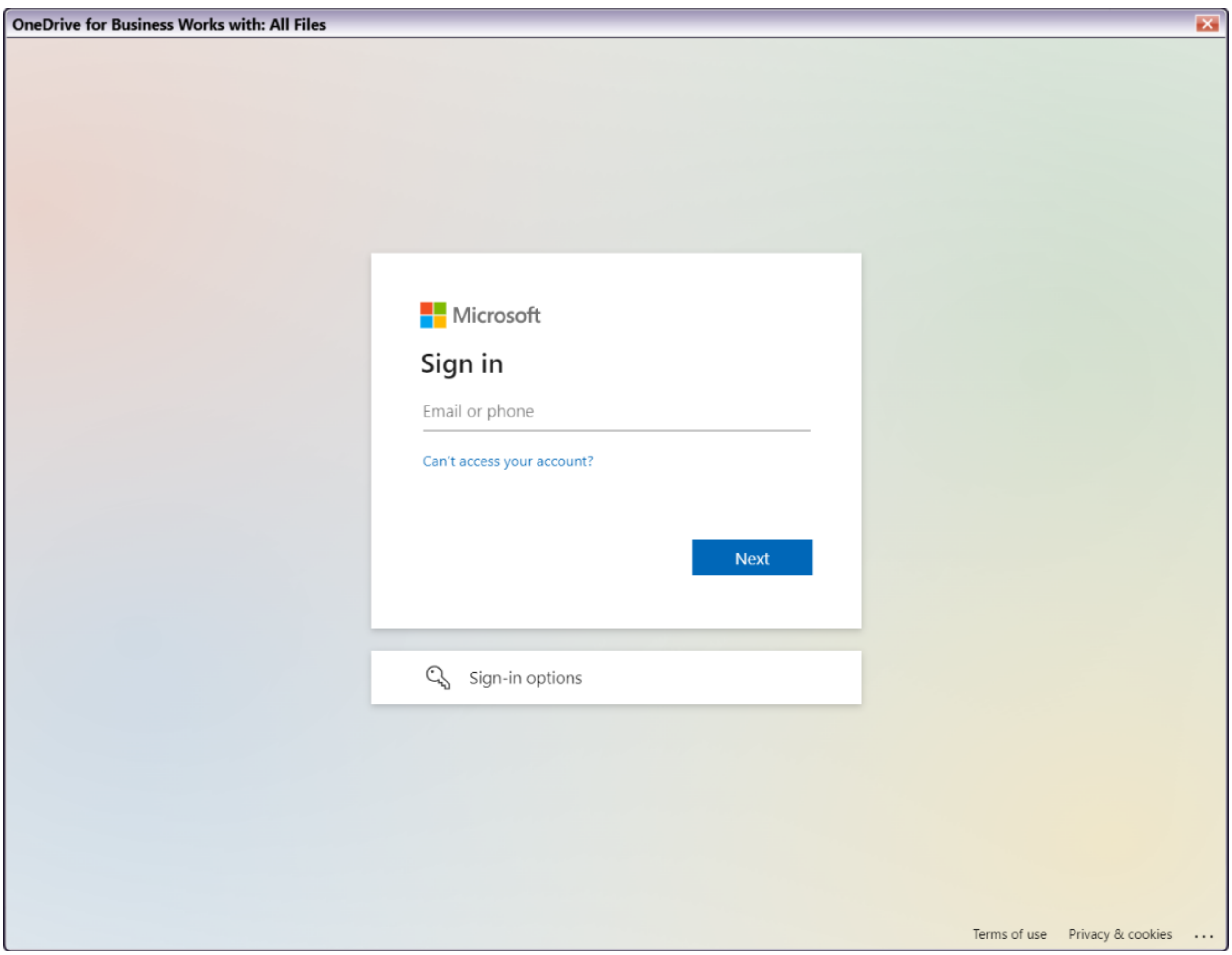
Buttons

- **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.

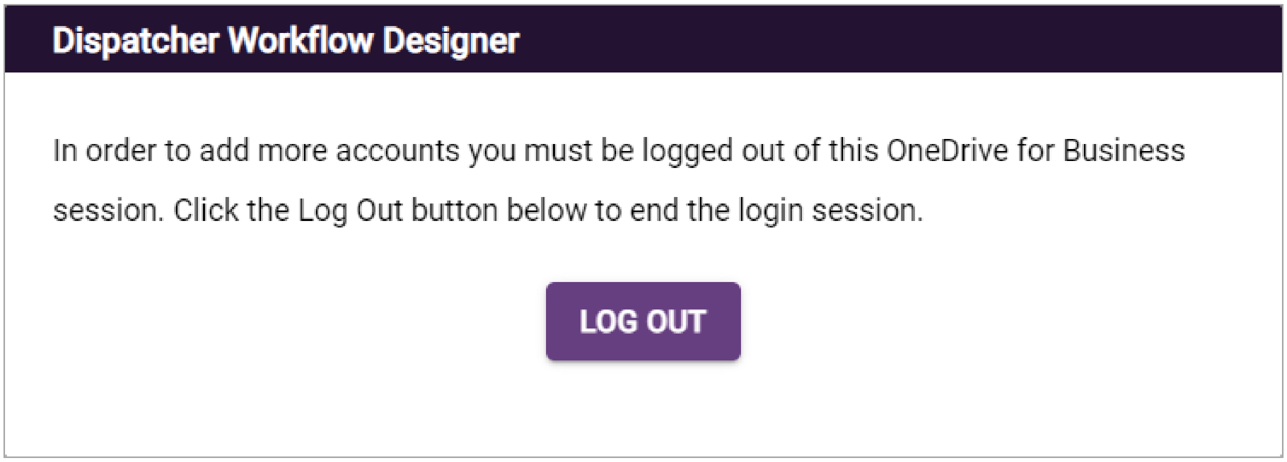
Authorization

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.

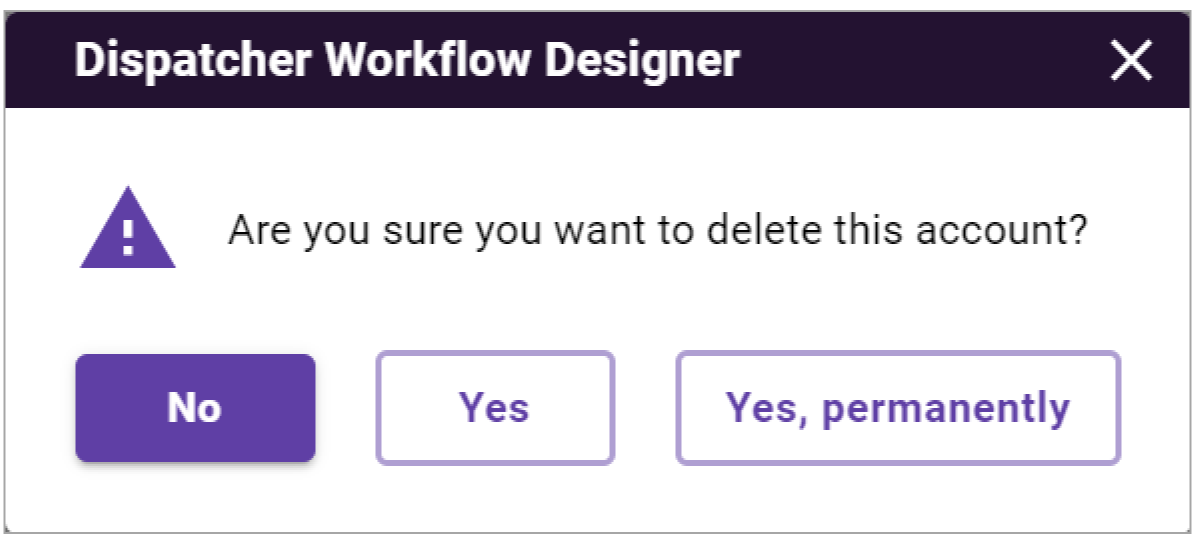


Note: You can add only one OneDrive for Business account per session. To add another OneDrive for Business account, you must save the node and reopen it.

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.

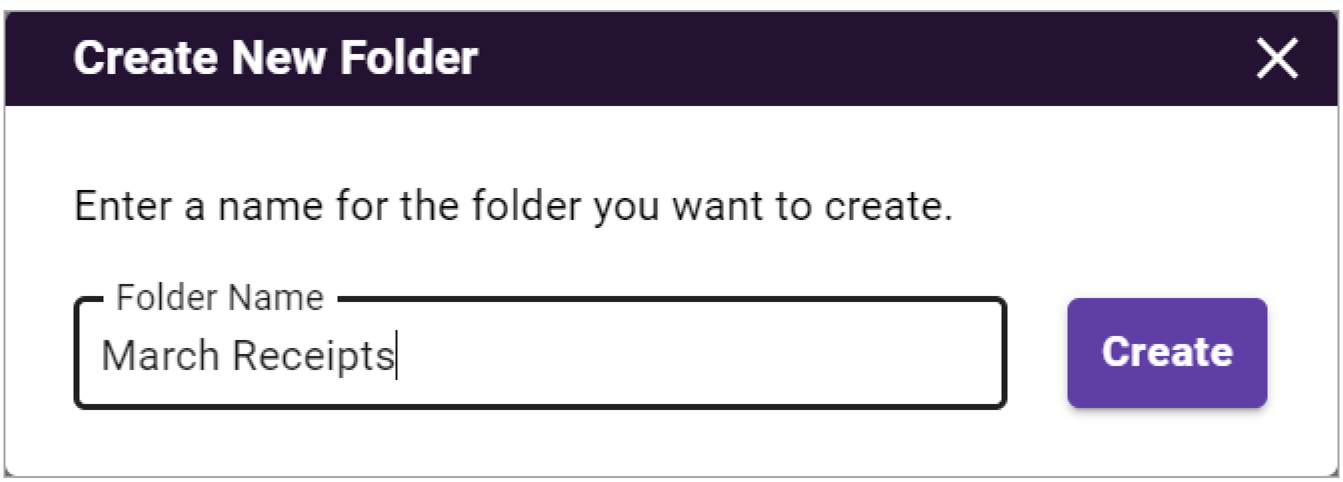
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to OneDrive for Business with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as 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.

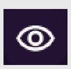
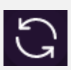
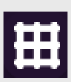
File and Folder Name Restrictions

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.

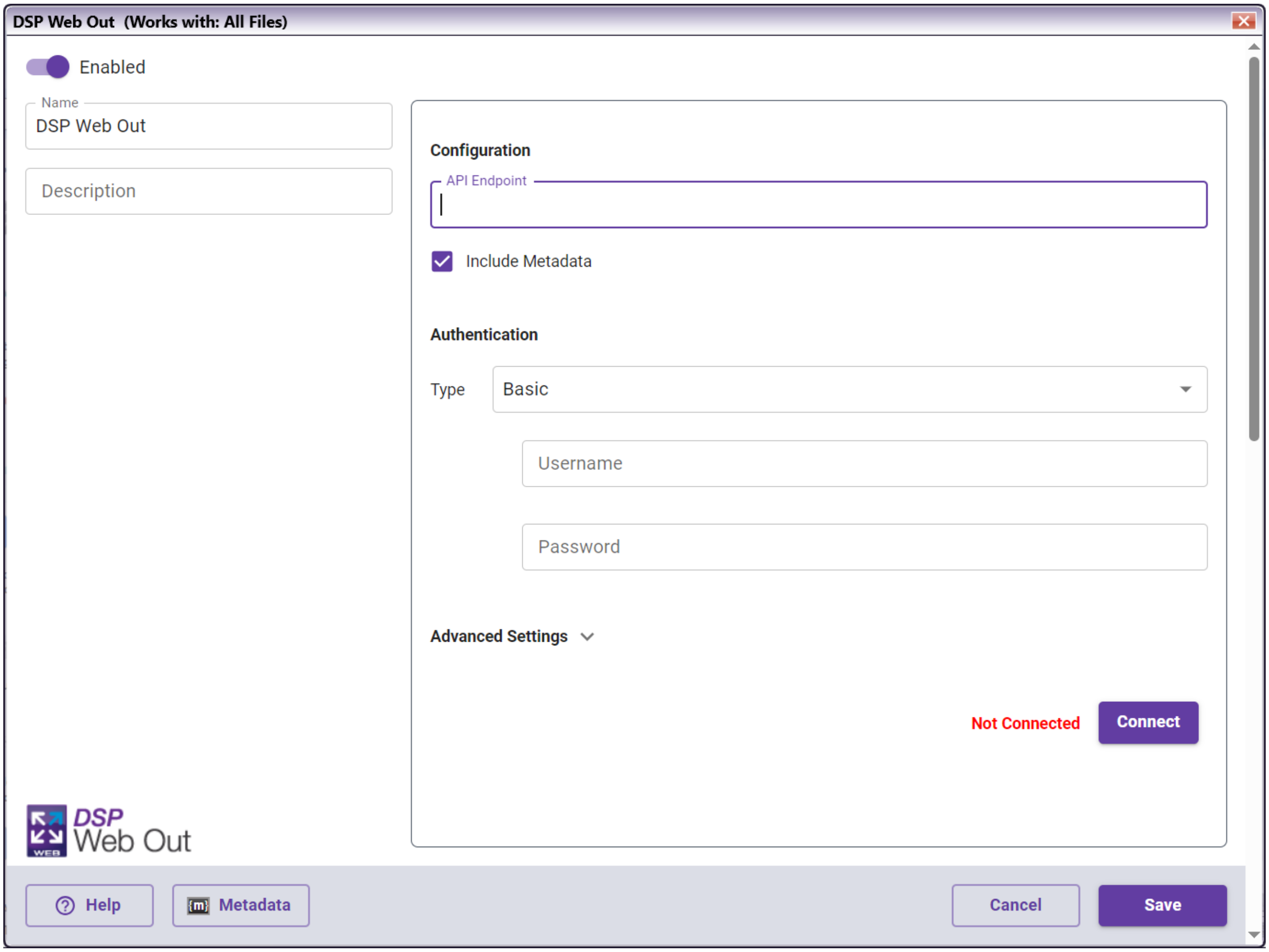
5. **Select the “Scan” button** - This sends the scanned document to the selected OneDrive for Business account and folder.

DSP Web Out

The DSP Web Out node is designed for use with applications/features that have been developed by members of the Dispatcher Stratus Developer Support Program (DSP). For more information about the DSP, please contact your Konica Minolta representative.

Configuring the DSP Web Out Node

To open the DSP Web Out node window, add a distribution node for DSP Web Out node and double-click on it.



- **Enabled** - To enable this node in the current workflow, ensure the **Enabled** toggle is on 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

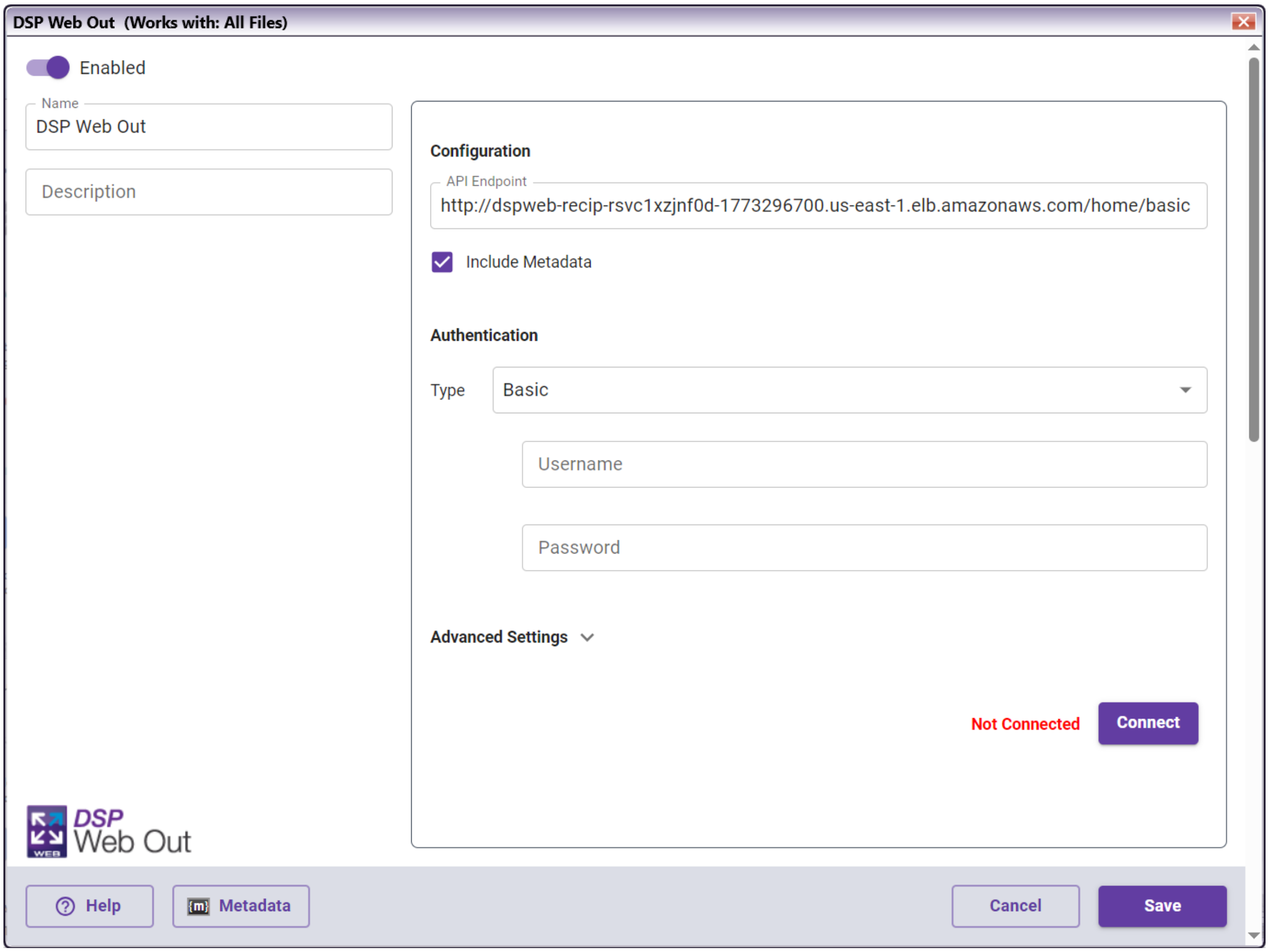
- **Help** - To access Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node definition and exit the window, click this button.

Application Setup

To use this with a DSP-developed web service, you must configure the node to point to the web-based application or API's location (e.g., a URL). To configure the node, do the following:

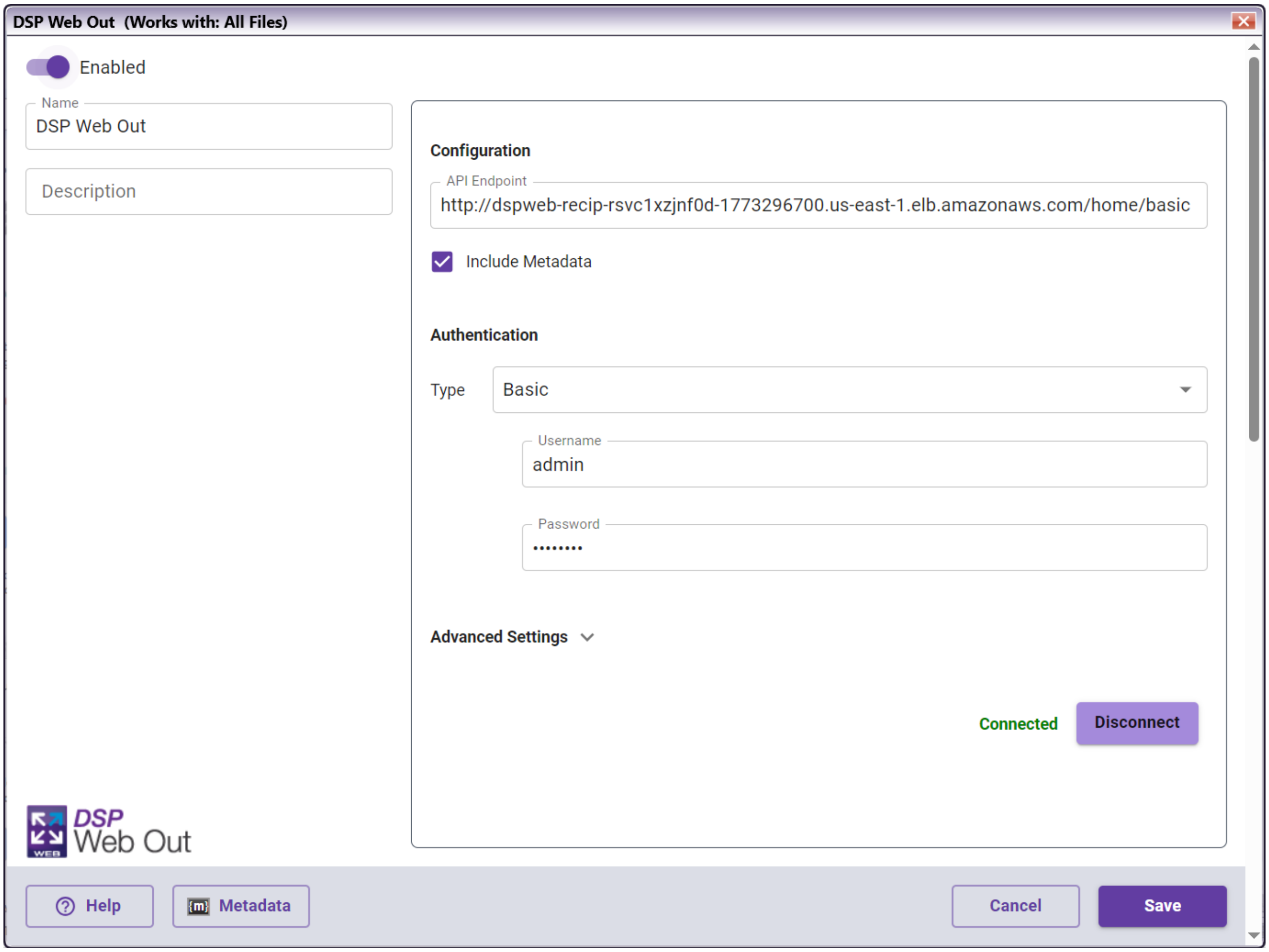
1. Double-click the DSP Web Out node to open it.

2. Enter the API Endpoint to the application.



3. Select your **Authentication** type. Options include:
   - Basic - This will prompt you to enter your **Username** and **Password**.
   - APIKey - This will prompt you to enter your **Key Name** and **Key Value**.
   - Bearer Token - This will prompt you to enter your **Token**.

4. Select the **Connect** button. This will establish a connection between the DSP Web Out node and the application and connect any metadata keys or value pairs provided from the application so the metadata can be used by subsequent nodes in the workflow. This will also confirm that the application is properly registered with a valid DSP license key.

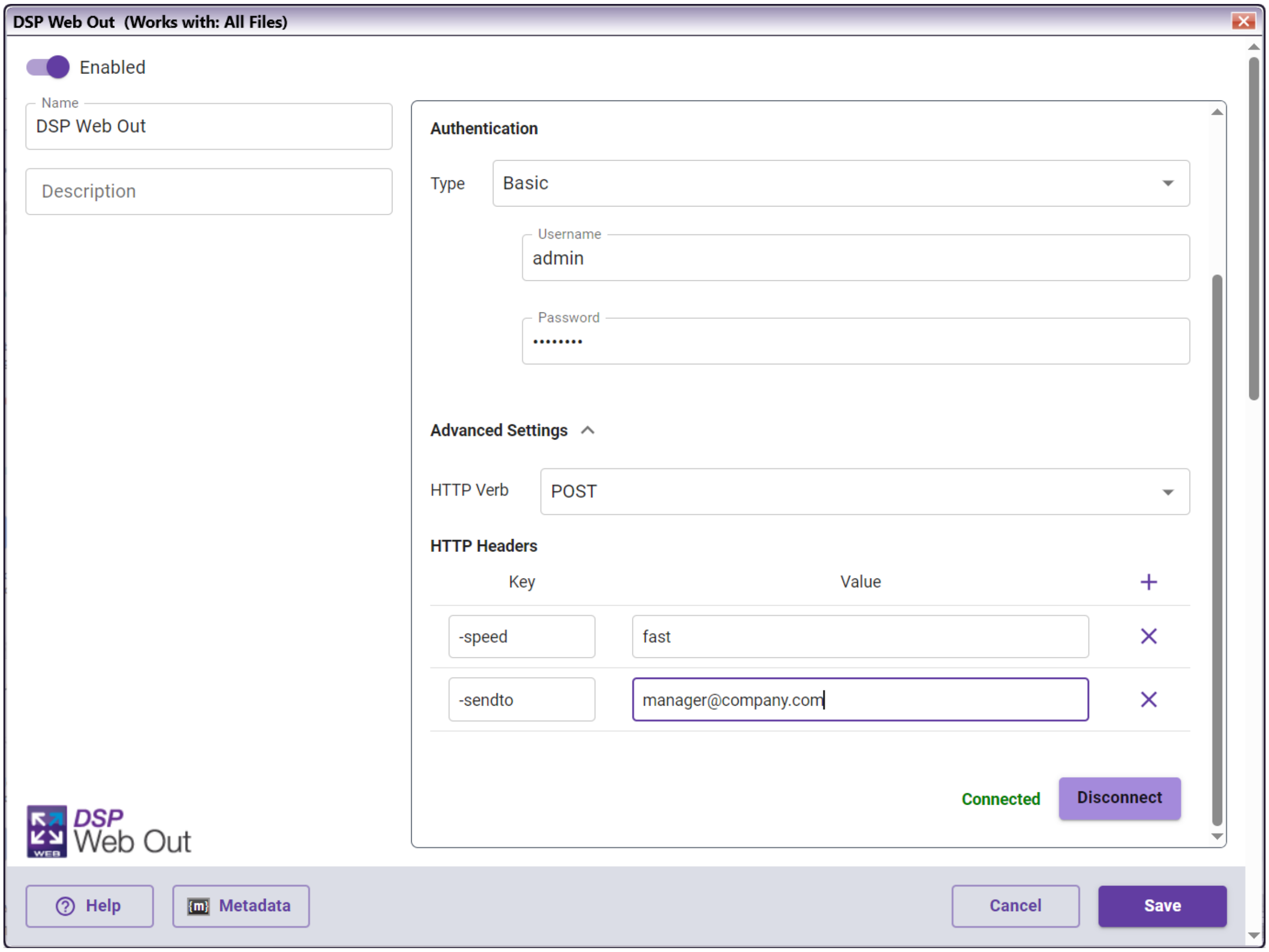


Important! If you have not successfully connected, the workflow cannot be properly validated.

Note: Any changes made to the API field will require you to select the **Connect** button to reestablish the connection.

5. If needed, select the **Advanced Settings** drop-down to reveal additional configuration options. You can:
    - Select the **HTTP Verb**. Options include:
        - Get
        - Post
        - Put
        - Patch
        - Delete
    - Add any Headers necessary for the application. To add a Header, select the **Add Header** button. This will allow you to enter a **Key** and **Value** for the Header. Headers are

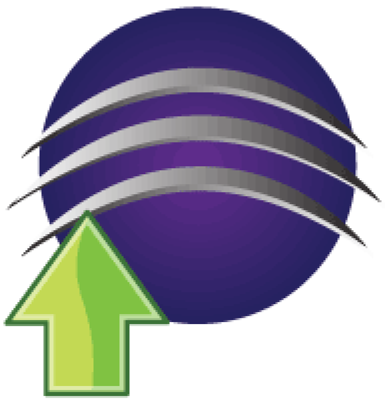
additional coding commands outside the application, which can alter how the application performs. Any necessary **Header Keys** and **Values** will likely be provided in the installation instructions along with the application; otherwise, this field can be left blank. You may add more than one Header. To delete a Header you've added, select the **Remove** button next to the Header. Headers are also metadata compatible.



6. Save and close the node.

Note: The DSP Web Out node will distribute documents whenever possible, according to the specifications of the connected application. In the event that the node or application generates an error during processing, you will need to consult the application logs for specific details about the error.

Paragon Cloud Fax Connector



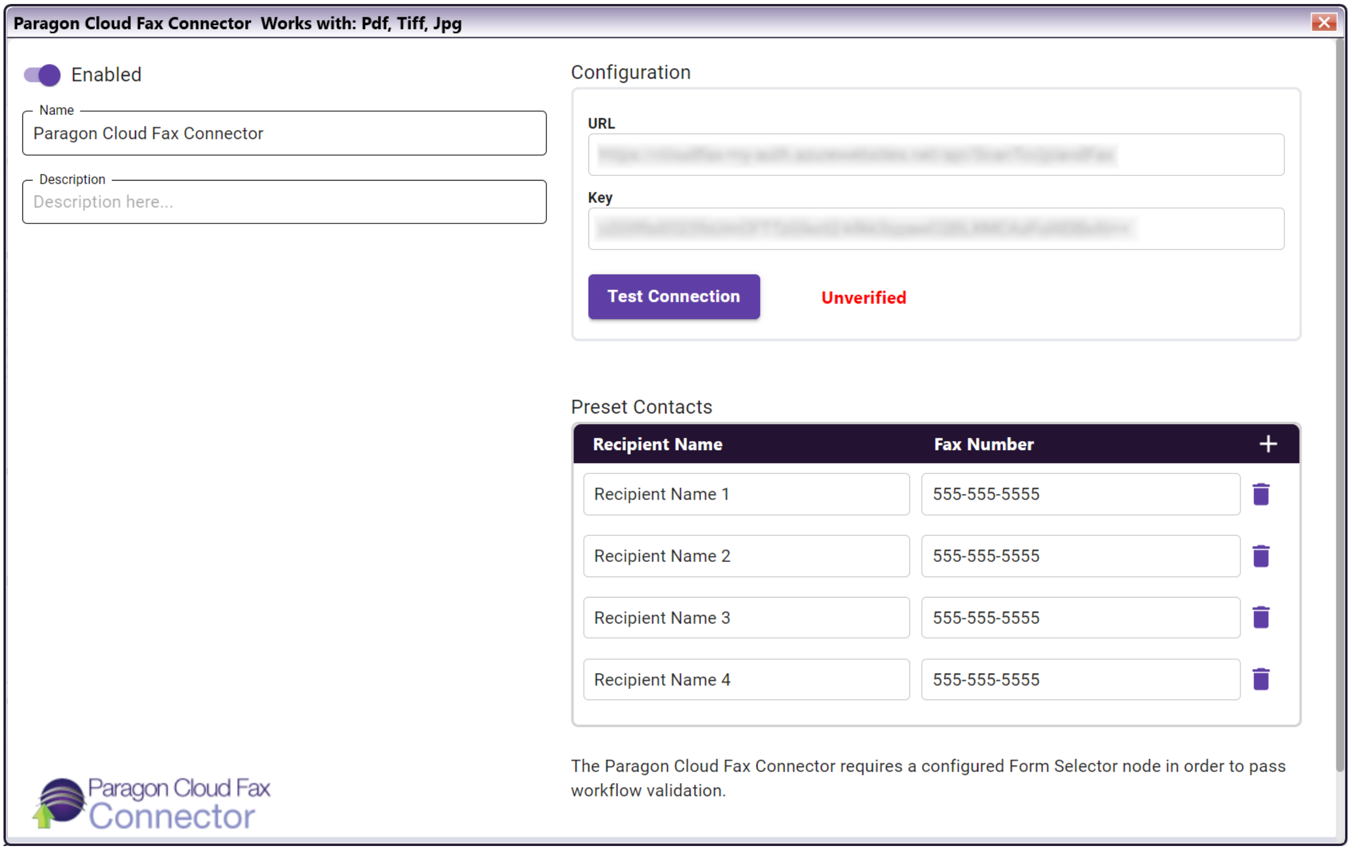
The **Paragon Cloud Fax Connector** is designed to allow users to send documents from a workflow through the Paragon cloud-based online fax service. Using the Paragon Cloud Fax Connector, you can do the following:

- 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

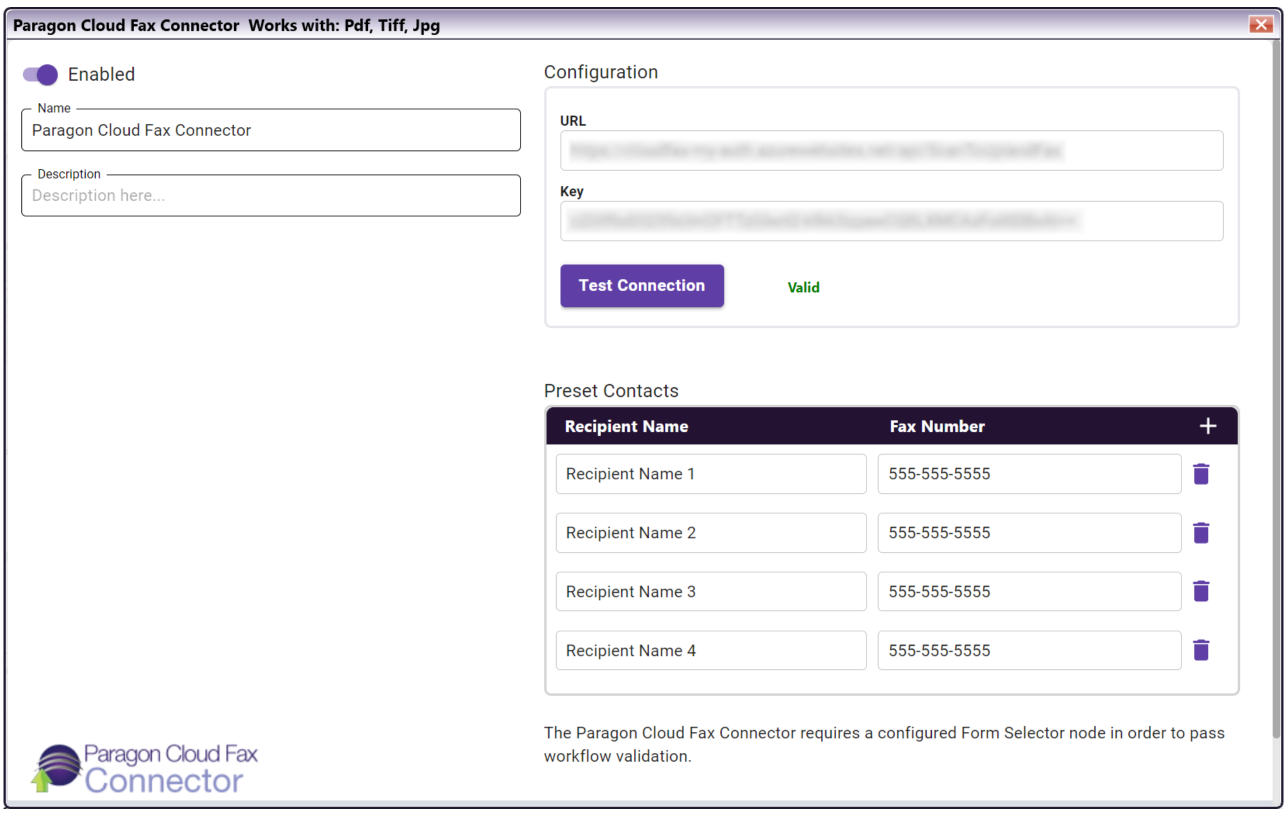
- **Help** - To access Dispatcher Stratus Online Help, click this button.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.

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:

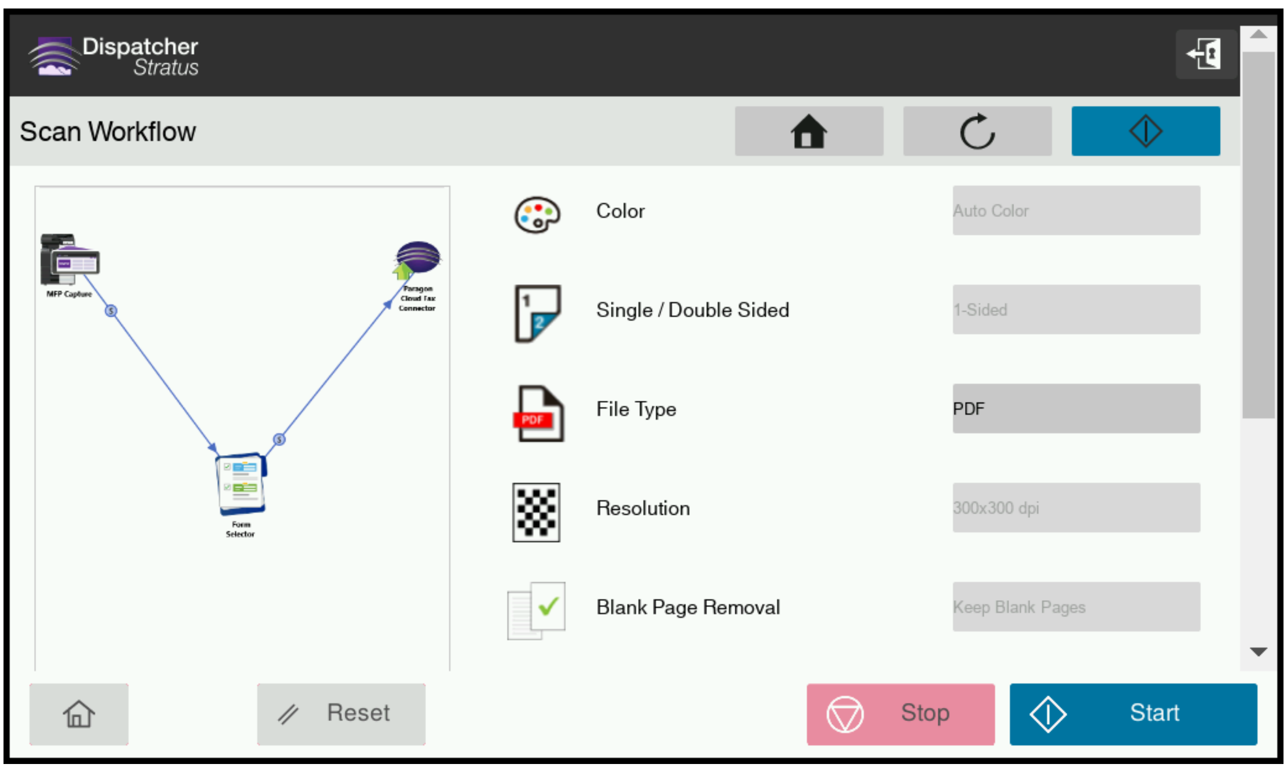
1. Edit the Recipient Name field with a friendly name for the fax contact.
2. Edit the Fax Number field with a fax number for the contact.
3. Select the **Save** button to save all changes and close the node.

You can add additional contacts to the phonebook by selecting the icon. You can delete unneeded phonebook contacts by selecting the icon.

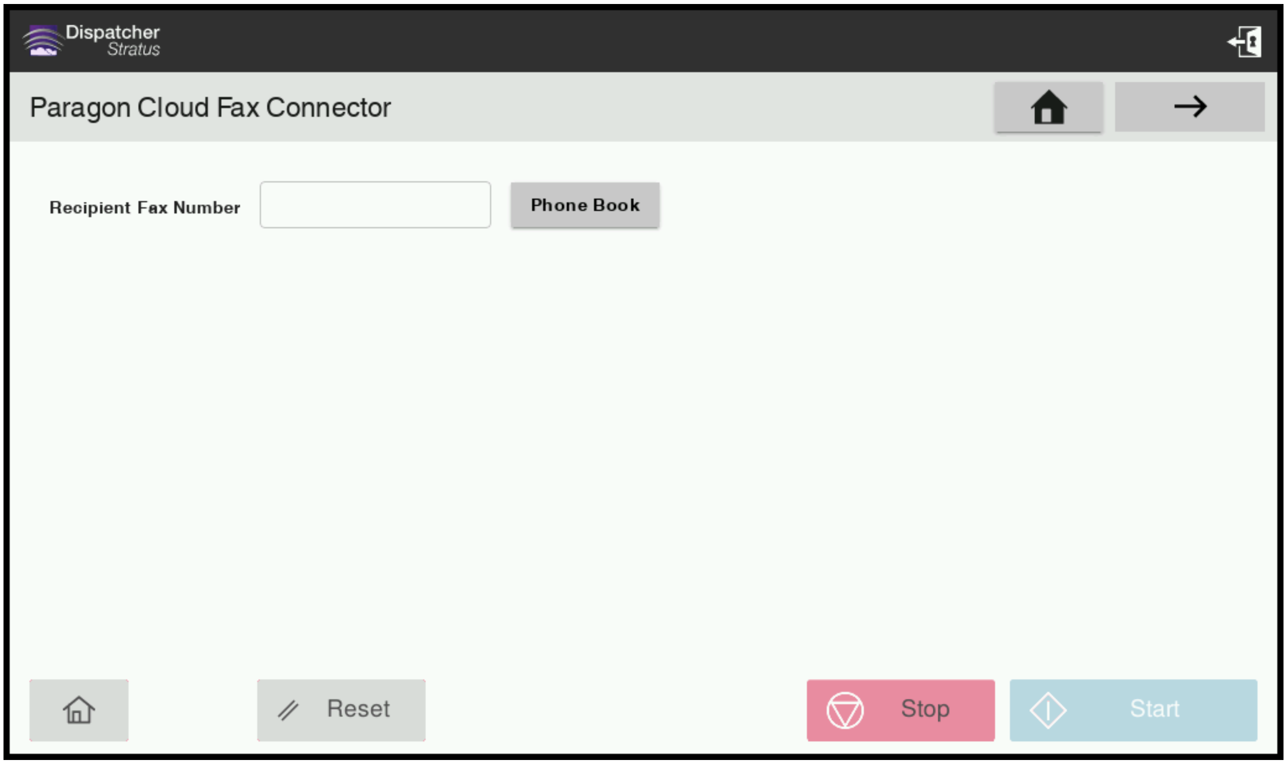
Paragon Cloud Fax Connector at the MFP

At the MFP, take the following steps:

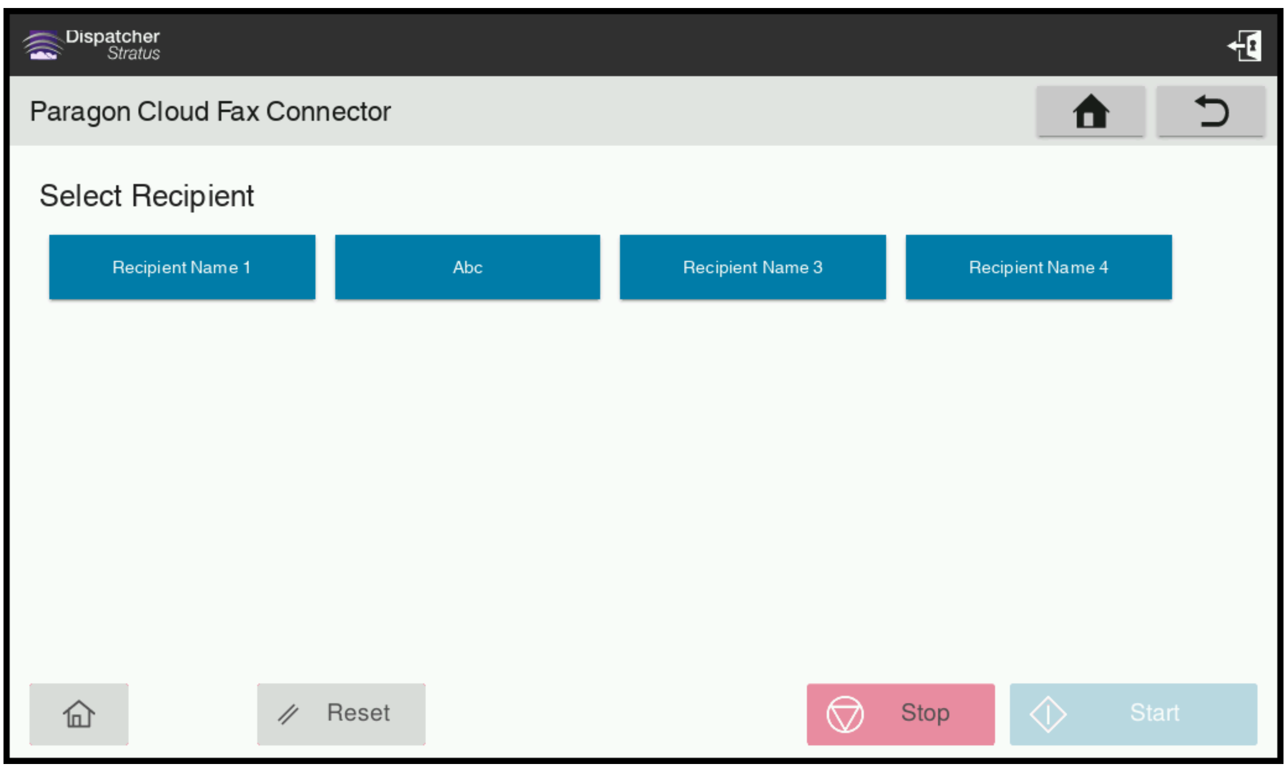
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.
2. **Edit your scan settings** - Update any scan settings necessary, as in the following illustration:



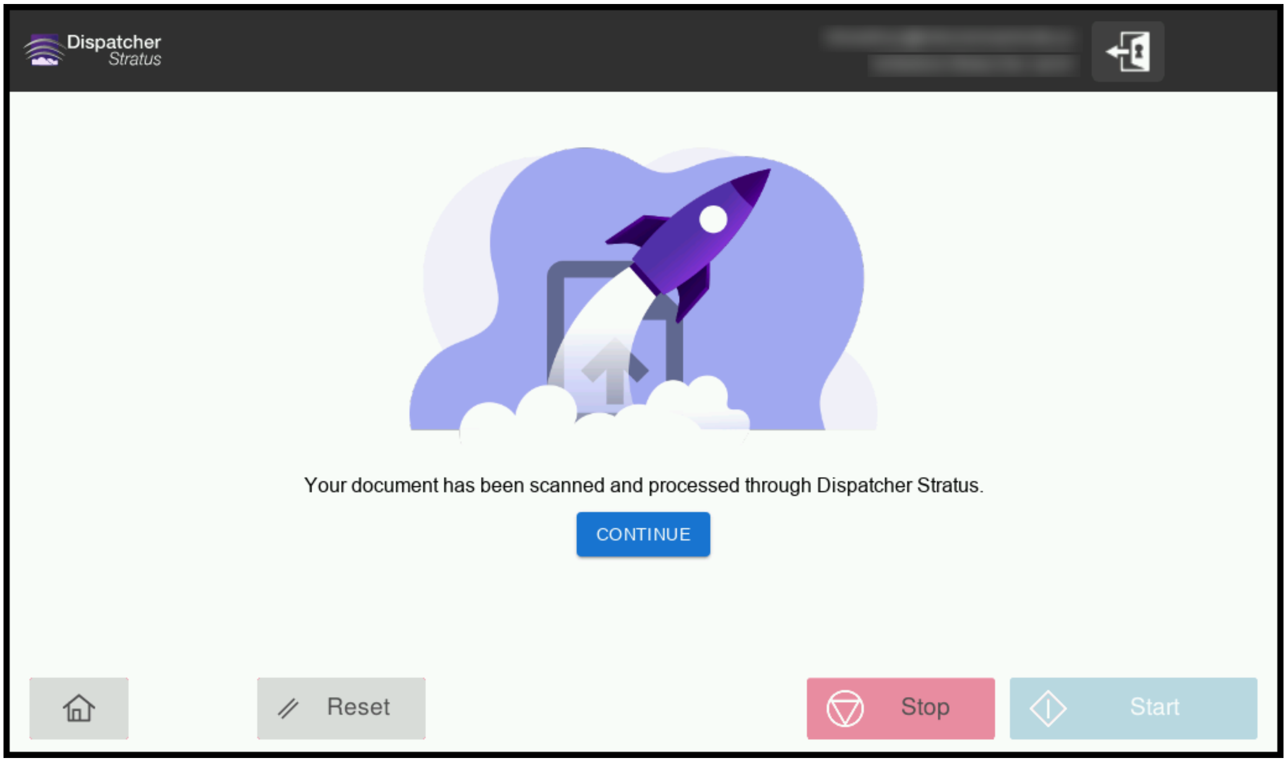
3. **Scan your document** - Your document will be scanned and, if the Preview option is enabled, you will see a preview of the scanned document.
4. **Enter the recipient's fax number** - After scanning, you will be prompted to enter a fax number.



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.



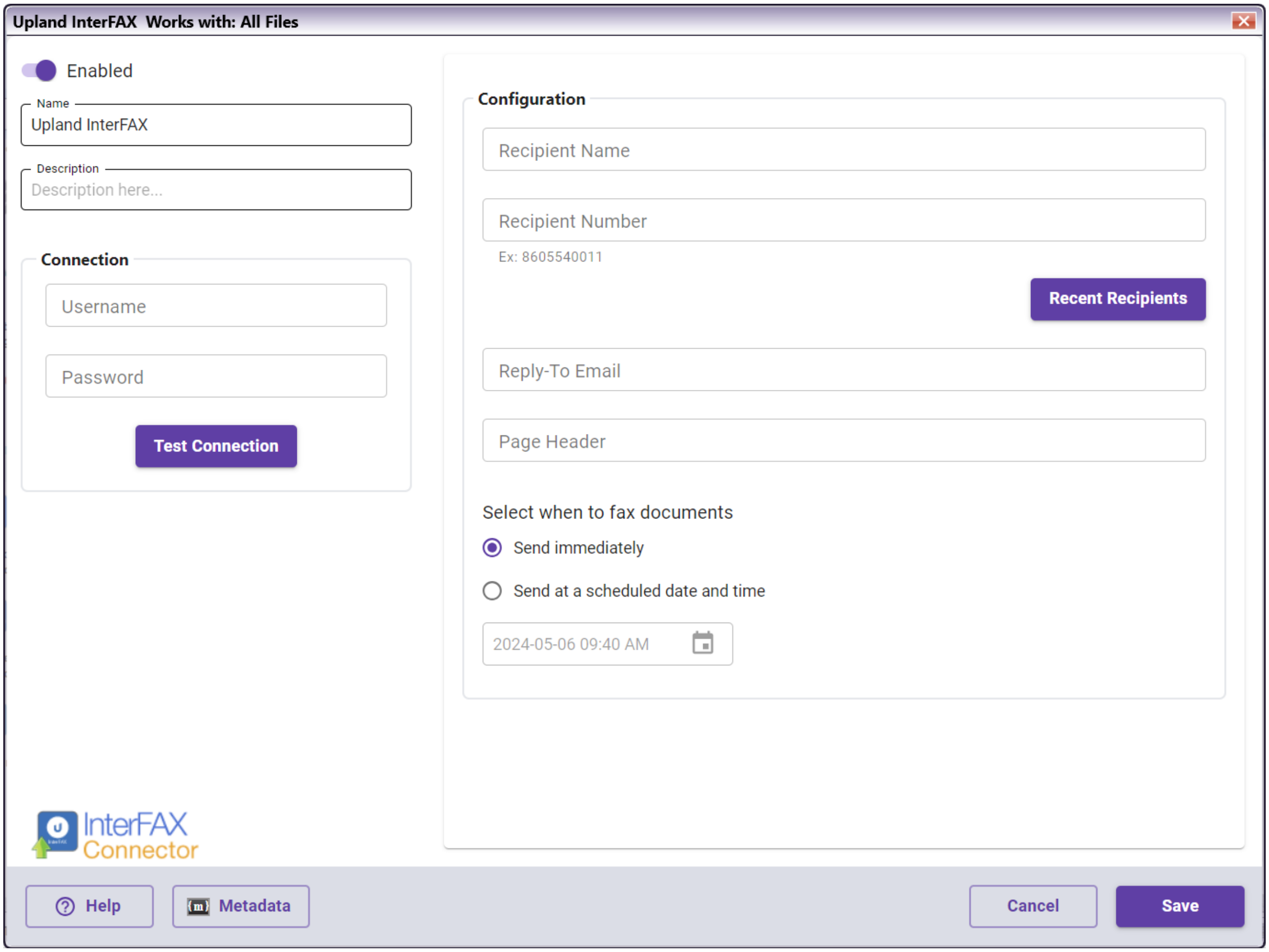
5. **Fax your document** - Your document will be automatically sent to the selected fax number.



Upland InterFAX Connector

Use the Upland InterFAX node to distribute files via Upland's web-based InterFAX system. Any documents routed through the Upland InterFAX Connector can be sent to a recipient specified by the node configuration window, node metadata, or data input at the MFP.

Note: To use the **Upland InterFAX** node, you must have an Upland InterFAX account.



Configuring the Upland InterFAX Node

To open the node's configuration window (shown above), add a distribution node for Upland InterFAX 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.

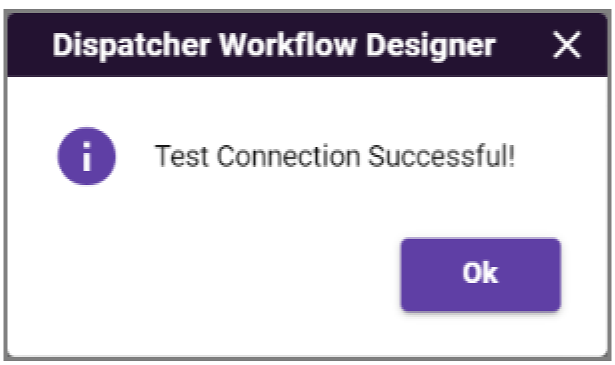
Buttons

- **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.

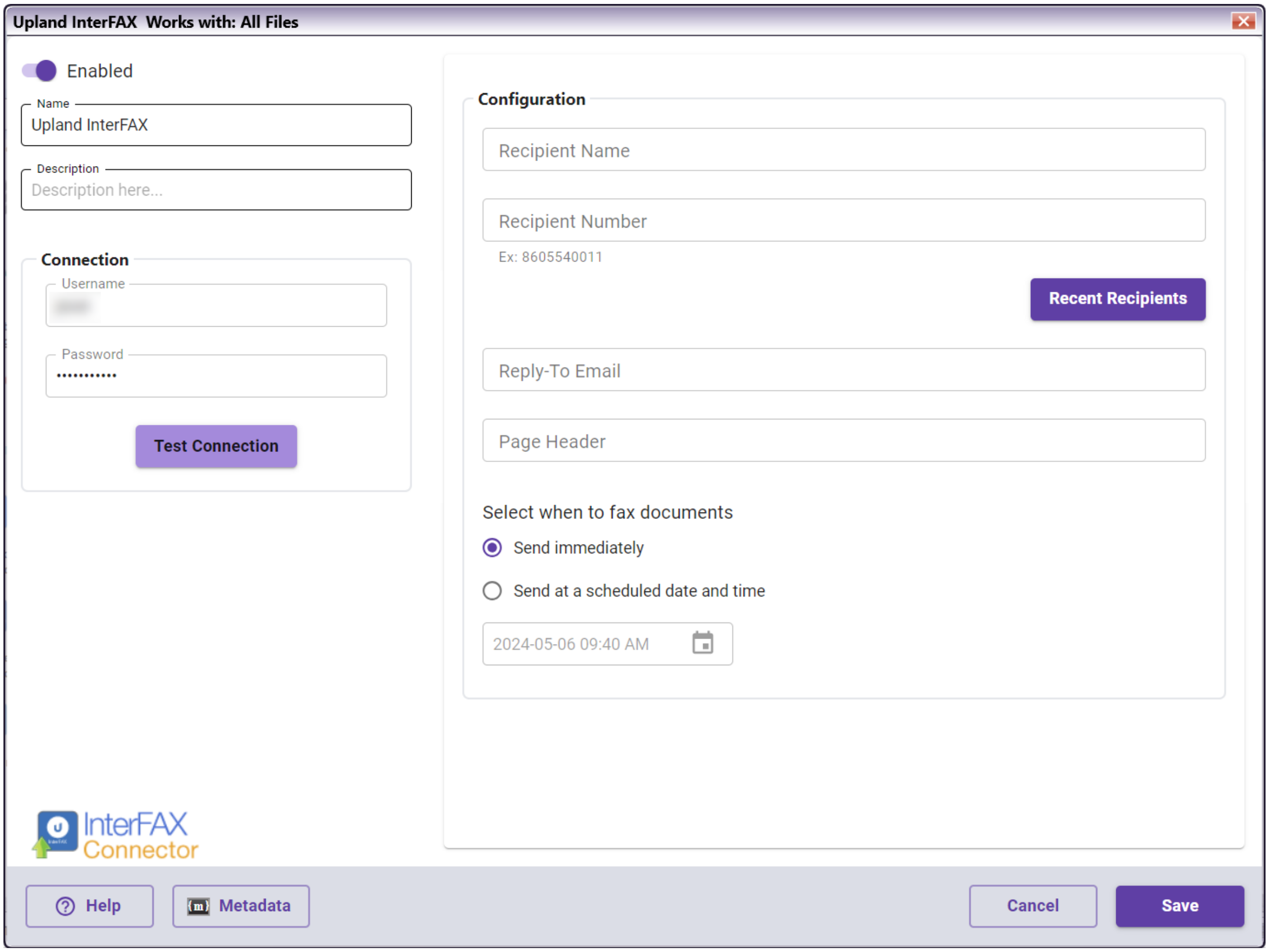
Connecting to Upland InterFAX

To connect to Upland InterFAX, do the following:

1. Enter the **Username** and **Password** for the Upland InterFAX.
2. Then, select the **Test Connection** button. If the connection is successful, a confirmation message will appear, as in the following illustration:



3. Click the **Ok** button to return to the node and continue configuration



Configuring the Upland InterFAX Connector

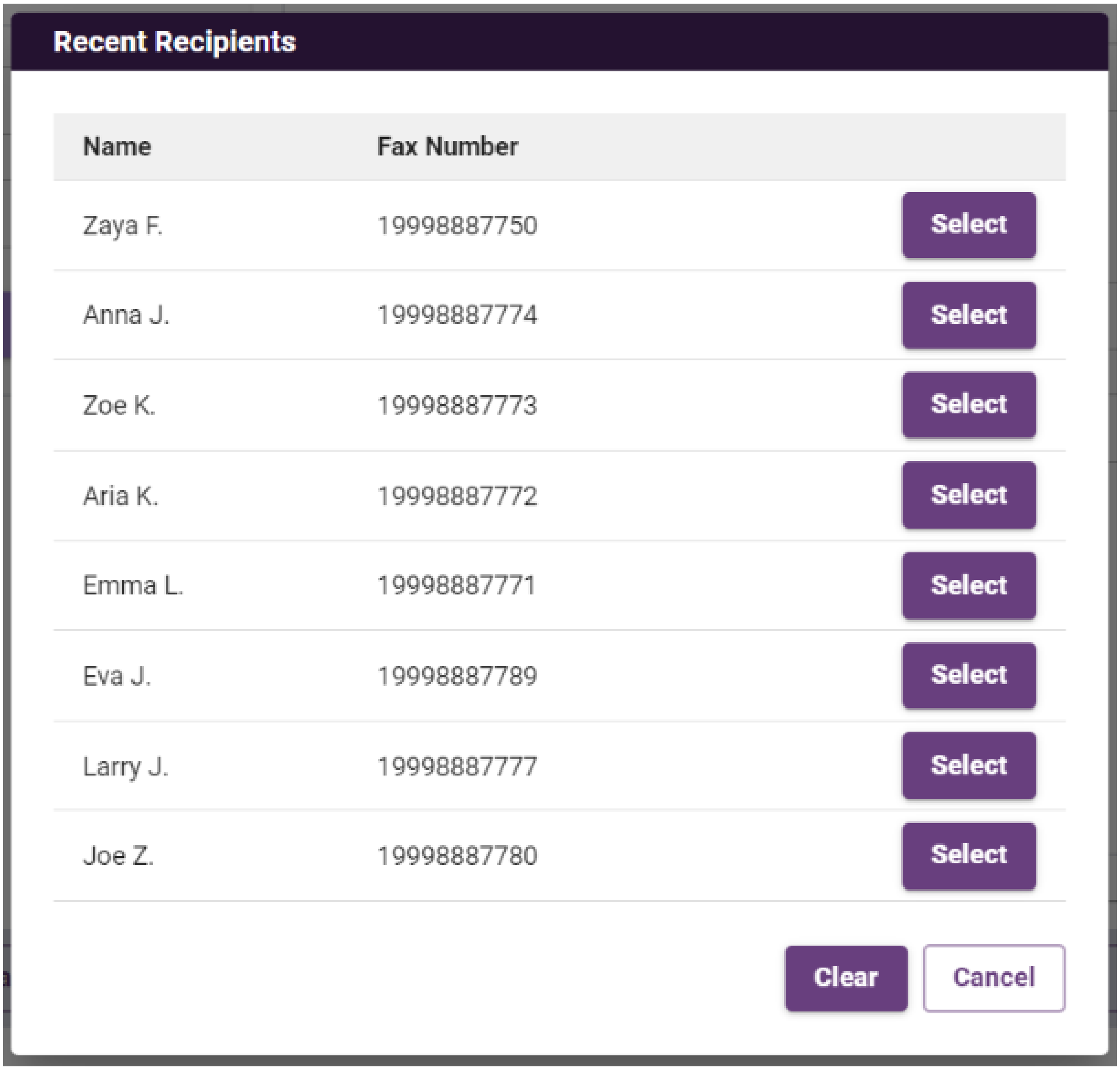
In this area, you will be able to enter more information about the recipient and the documents to be faxed. To configure the Upland InterFAX Connector, do the following:

1. Enter the **Recipient name** and **Recipient number** in the fields. These fields are required to successfully upload a document to the Upland InterFAX system.

   Notes:

   - The **Recipient Name** field accepts characters and/or metadata. The **Recipient number** field accepts numbers and/or metadata.
   - If a configuration field contains the curly bracket character (`{`), then the administrator must add an additional curly bracket next to it to prevent the node from attempting to read the entry as metadata. For example, a contact named "Cynthia {ABC Corp}" would need to be entered as `Cynthia {{ABC Corp}`

   You can also use the **Recent Recipients** button to open a window containing the fax information for up to ten (10) of the most recent numbers faxed to. These numbers are displayed chronologically with the most recent number at the top. Use the **Clear Recent Recipients** button to delete all recent recipients.

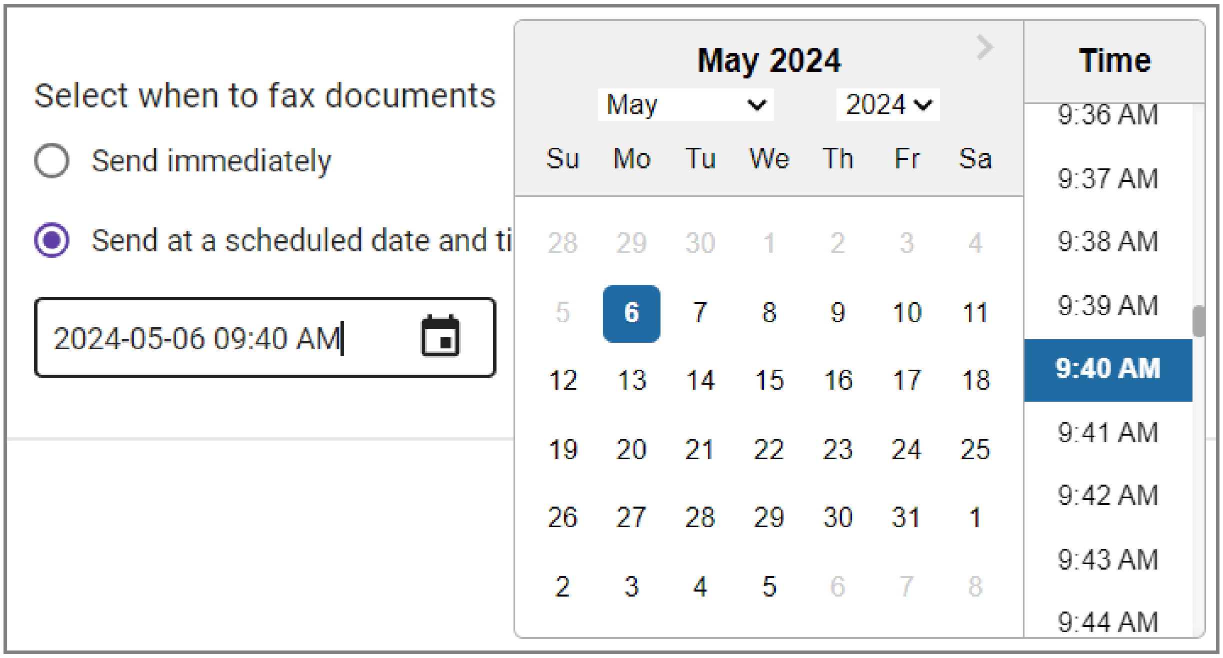


2. You can also enter a **Reply-To Email** and **Page Header**, if necessary.
3. Select when you would like documents sent via InterFAX.
    - **Send immediately** - This faxes documents as soon as they are uploaded to InterFAX.
    - **Send at a scheduled date and time** - Enter or select a date and time that InterFAX will send the uploaded documents.

      Note:

        - You cannot select to schedule a fax to send at a date and/or time in the past. If you schedule faxes to send at a future date/time and the workflow continues to run after that date/time, InterFAX will send any future faxes immediately.

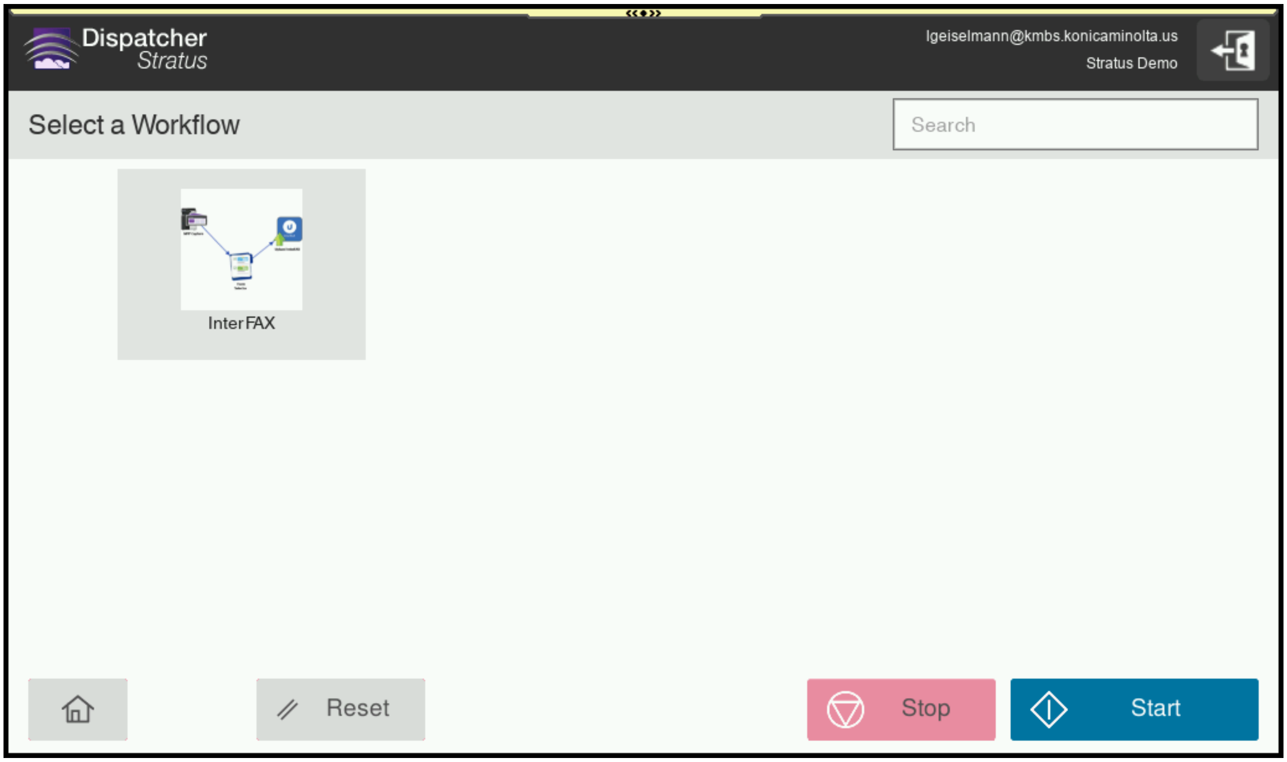
- Fax submission into the system can be delayed for up to 30 days.



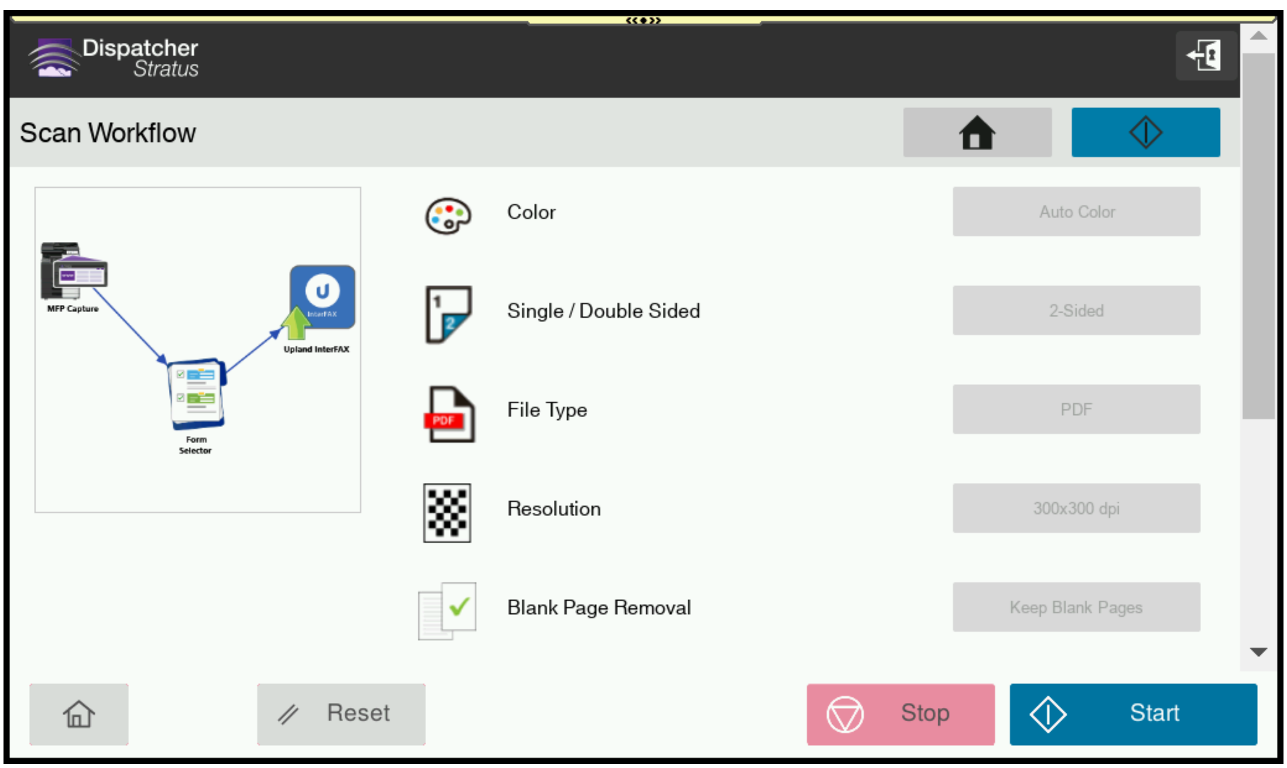
Accessing Upland InterFAX at the MFP

At the MFP, take the following steps:

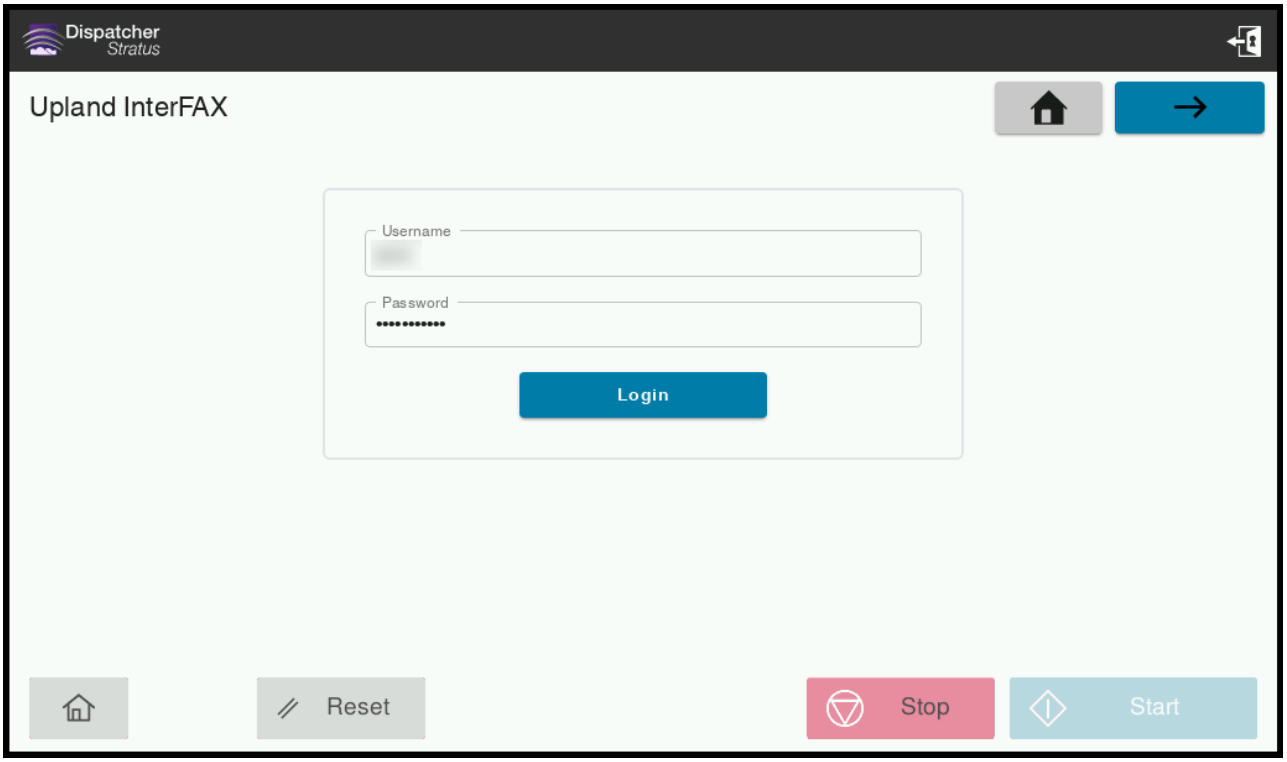
1. **Select your workflow** - If only one workflow is currently running, that workflow appears. However, if multiple workflows are running, the Selection screen appears and you must select a workflow.



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.

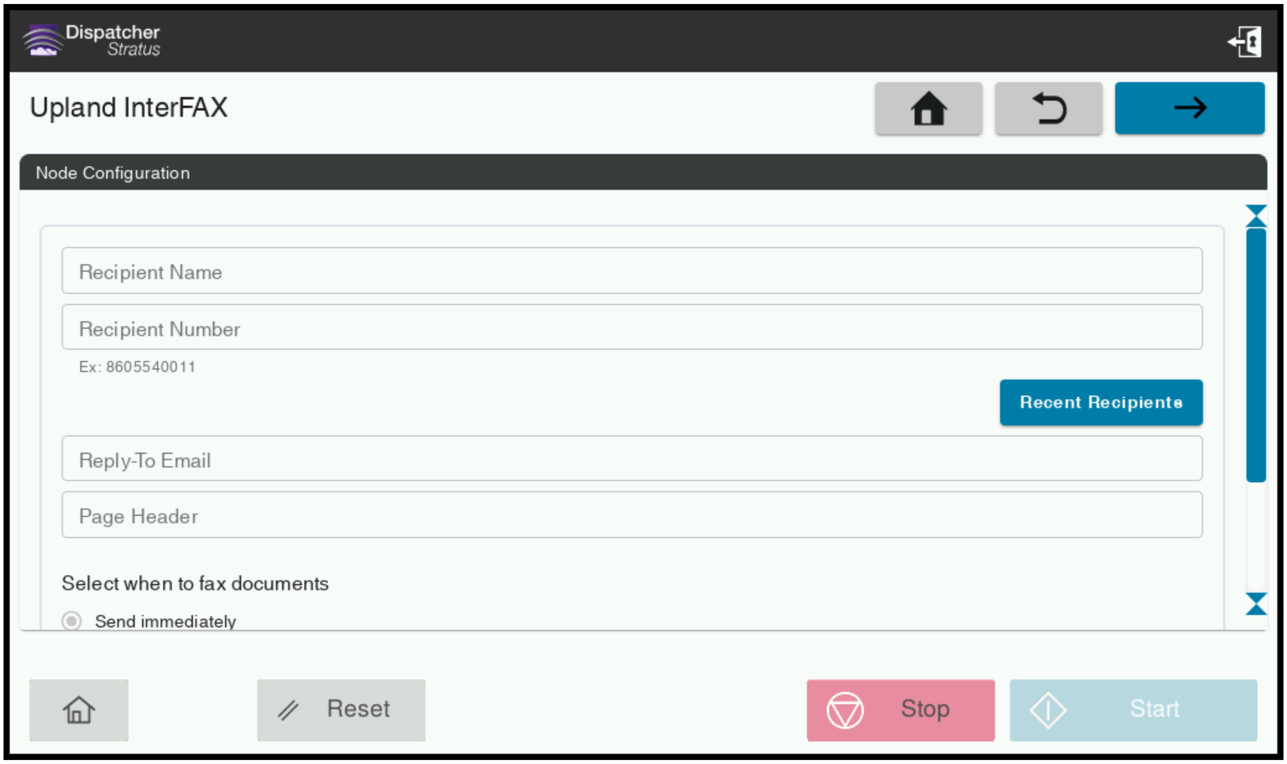


3. **Enter your login credentials** - If you configured a username and password in the node, they will prepopulate here. These can be edited at the MFP, if necessary. Click the **Login** button to confirm your connection to InterFAX.



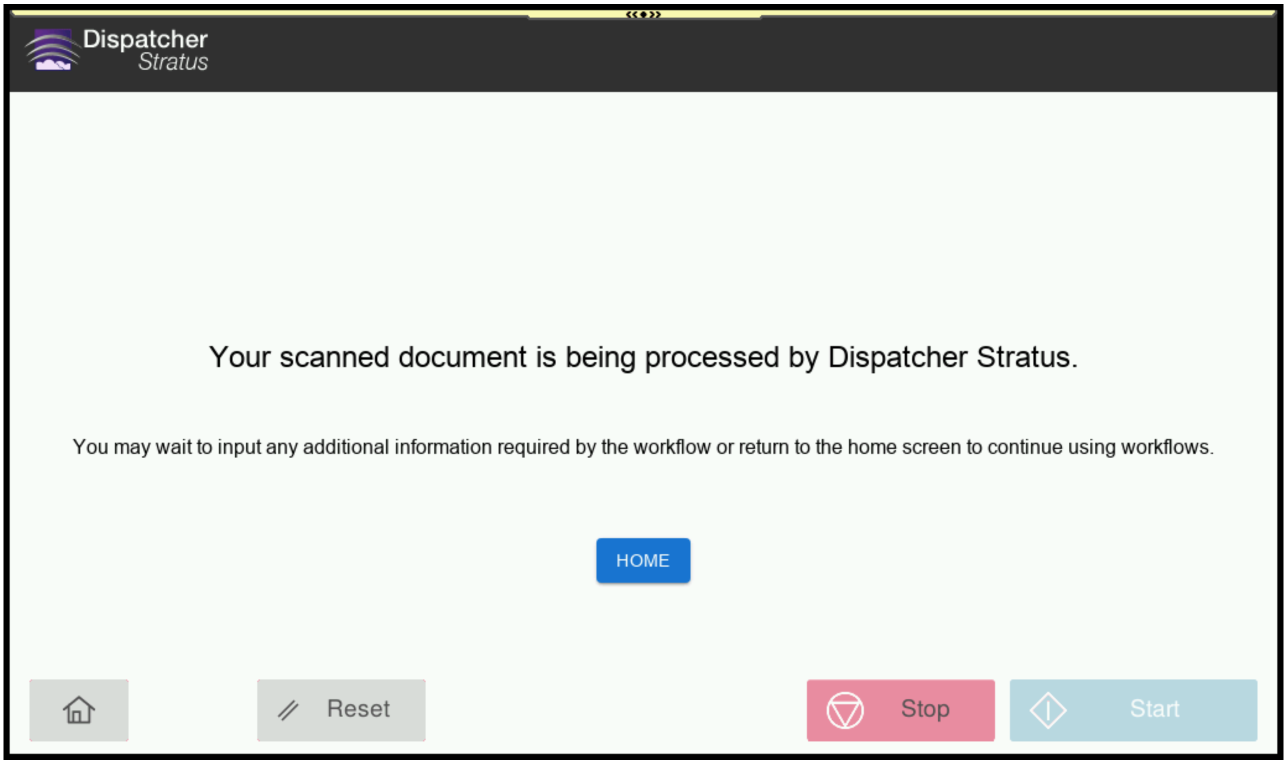
4. **Enter Any Additional Fax Information** - When you are logged in, you will have the opportunity to enter any additional information needed, including:

- Recipient Name
- Recipient Number
- Reply-To Email
- Page Header
- Send fax date/time



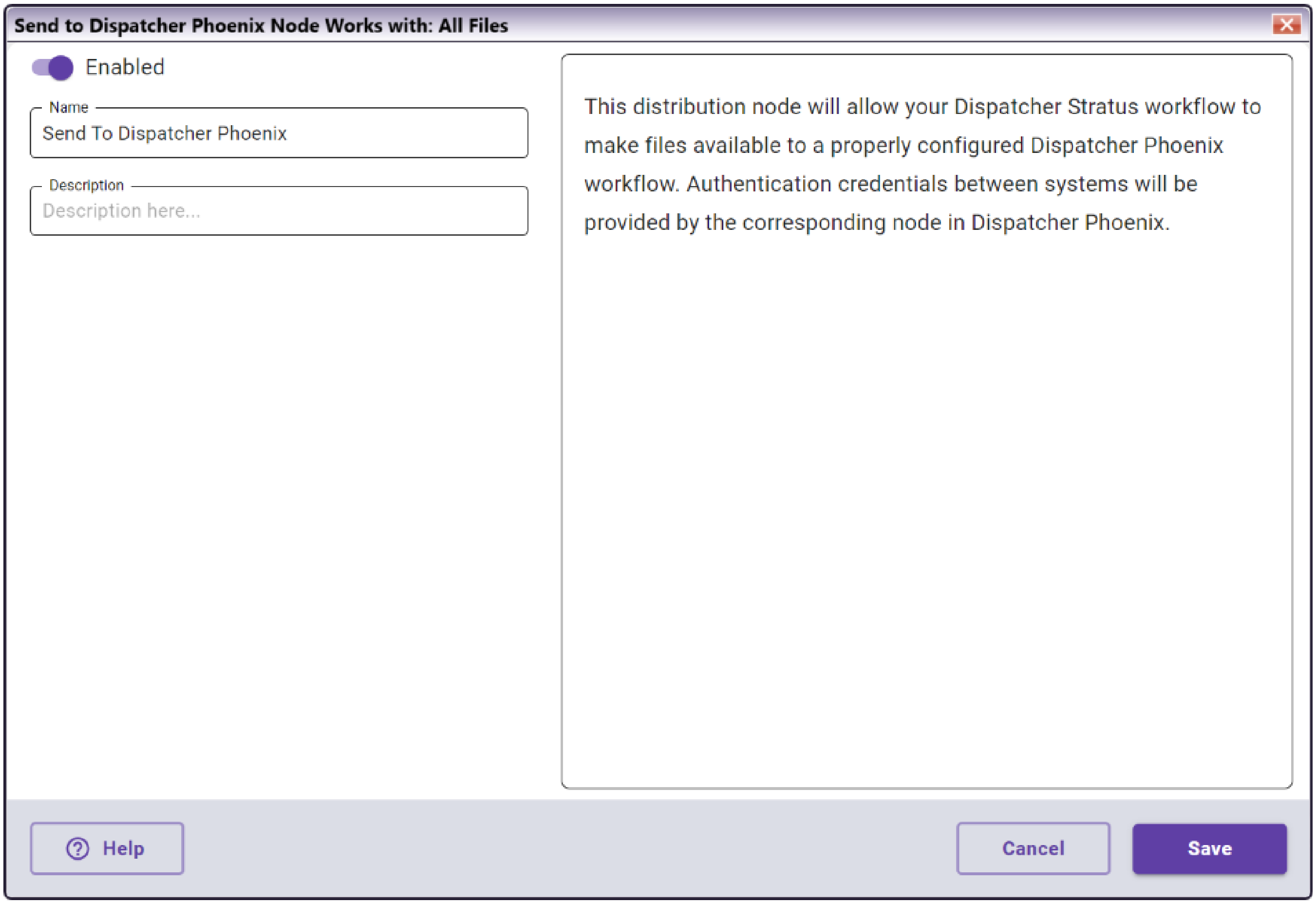
You can select the **Recent Recipients** button to see your recently faxed contacts.

5. **Select the "Scan" button** - This will send the scanned document to InterFAX to be faxed accordingly.



Send to Dispatcher Phoenix

Use this node to send documents from Dispatcher Stratus to any connected Dispatcher Phoenix installation. In this way, you can combine the People-based workflow capabilities of Dispatcher Stratus with the powerful document processing tools of Dispatcher Phoenix.



Configuring the Send to Dispatcher Phoenix Node

To open the **Send to Dispatcher Phoenix** node's configuration window (shown above), add the node to your workflow and double-click on it. The following options are available:

- **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.

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 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.

Configuration Options

This node does not contain any configuration options. All configuration occurs in the corresponding **Dispatcher Stratus In** node, which is described in the Dispatcher Phoenix Online Help.

Using the Send to Dispatcher Phoenix Node

The Send to Dispatcher Phoenix only sends documents and metadata to a linked Dispatcher Phoenix workflow. It does not support any user interaction during the workflow.

Metadata

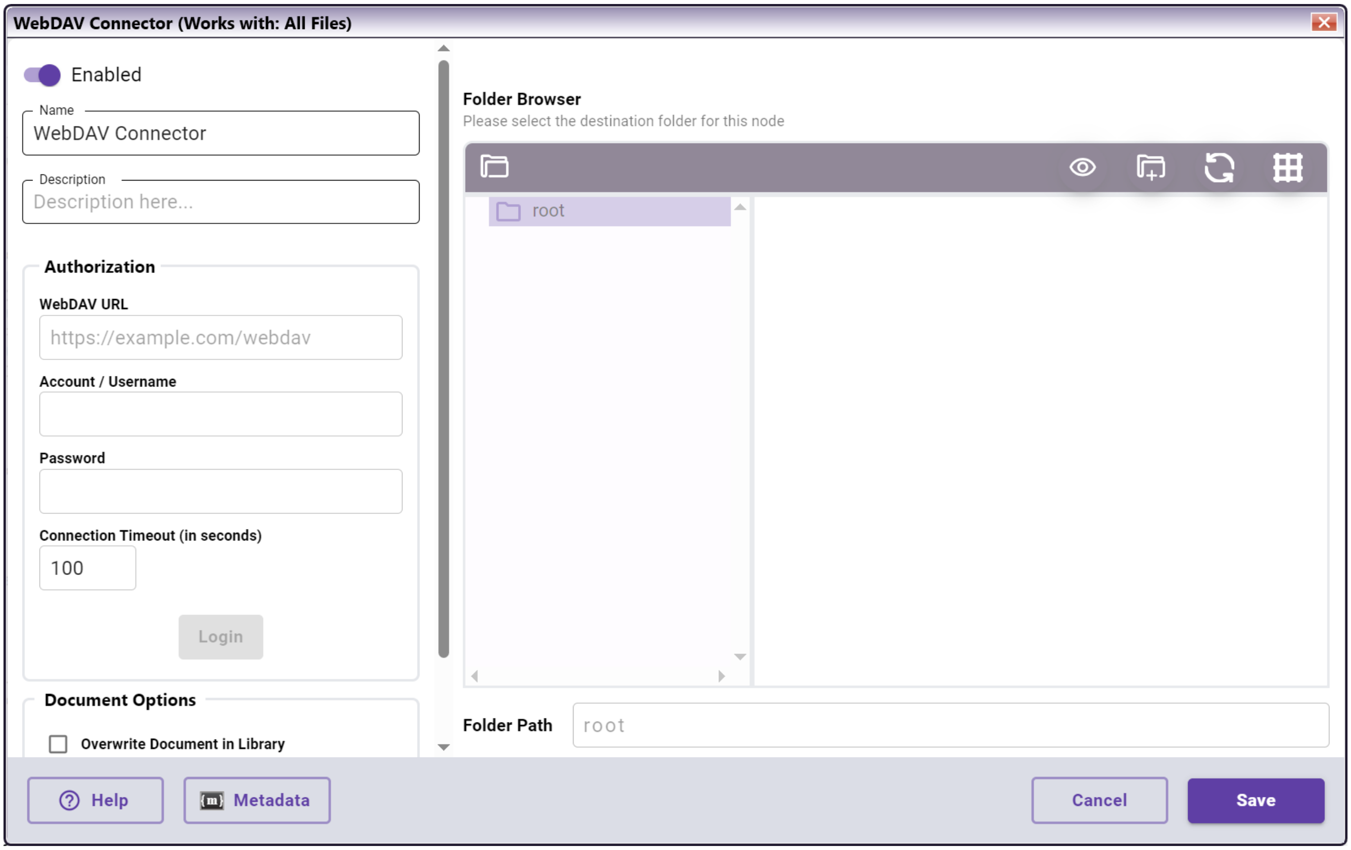
The Send to Dispatcher Phoenix node can export metadata from Dispatcher Stratus workflows into Dispatcher Phoenix. However, note the following:

- 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** or **Metadata to File** node. However, in either situation, you can manually select the metadata groups.

WebDAV Connector

WebDAV (Web-based Distributed Authoring and Versioning) is a standard protocol allowing users to access files on remote web servers. The Dispatcher Stratus 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.

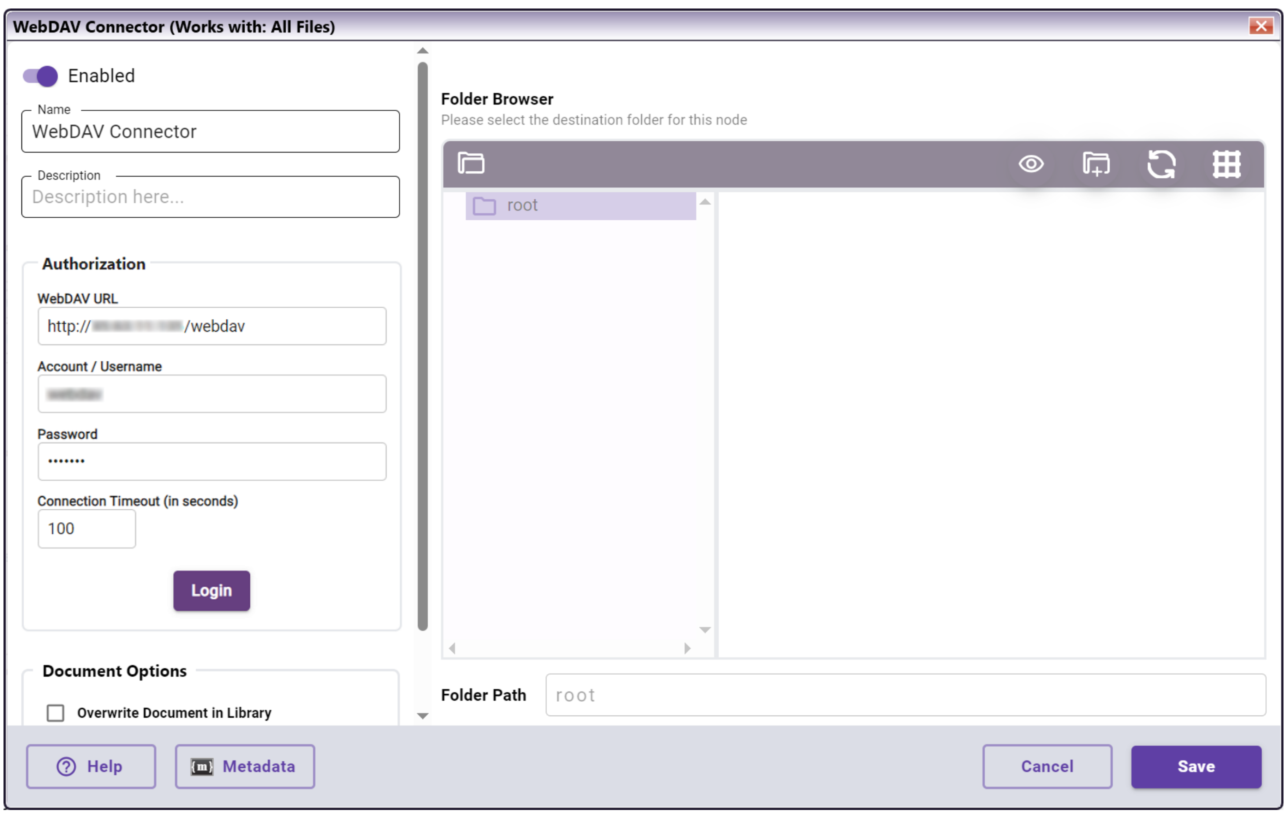
Buttons

- **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.

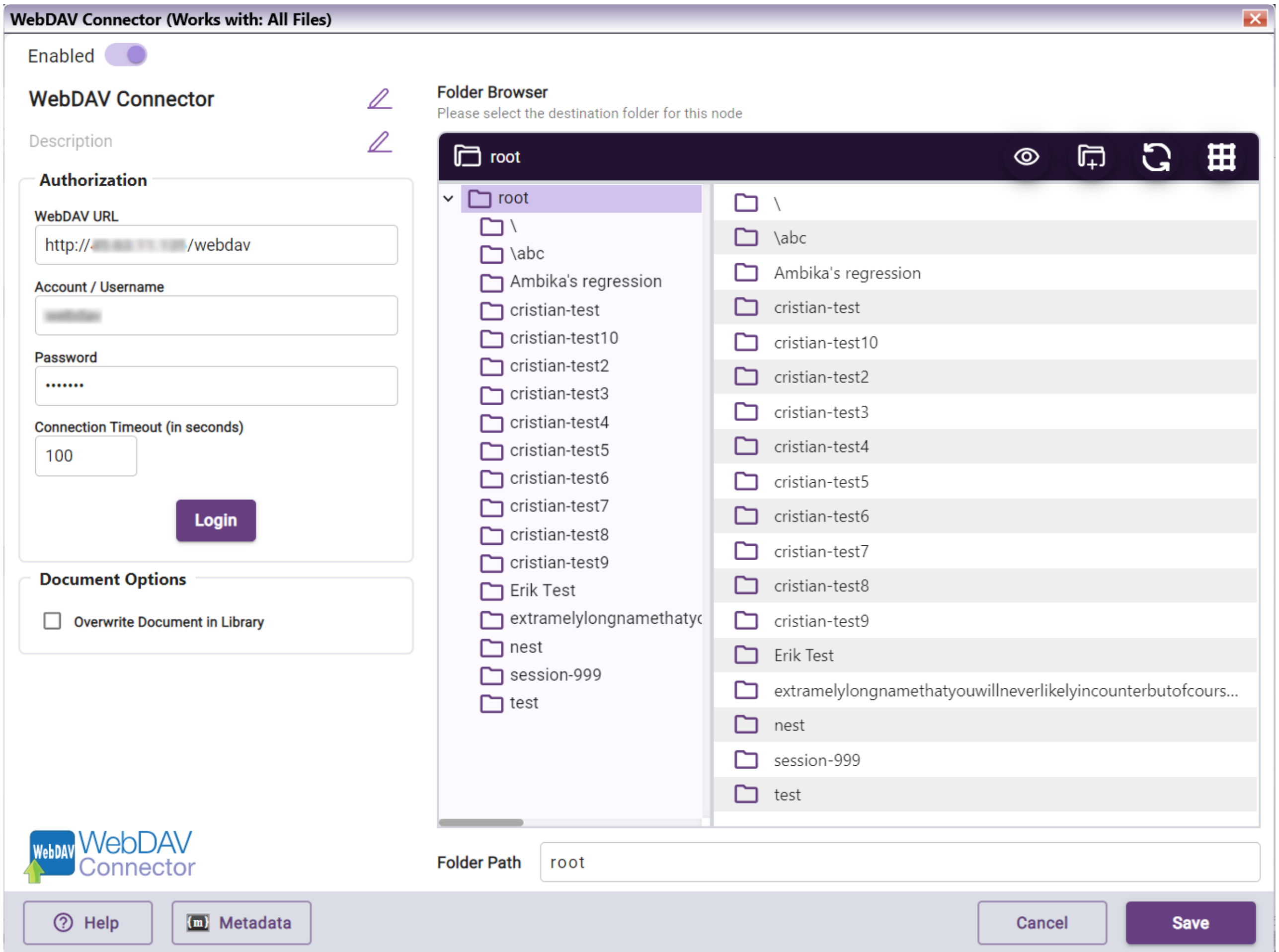
Authorization

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.

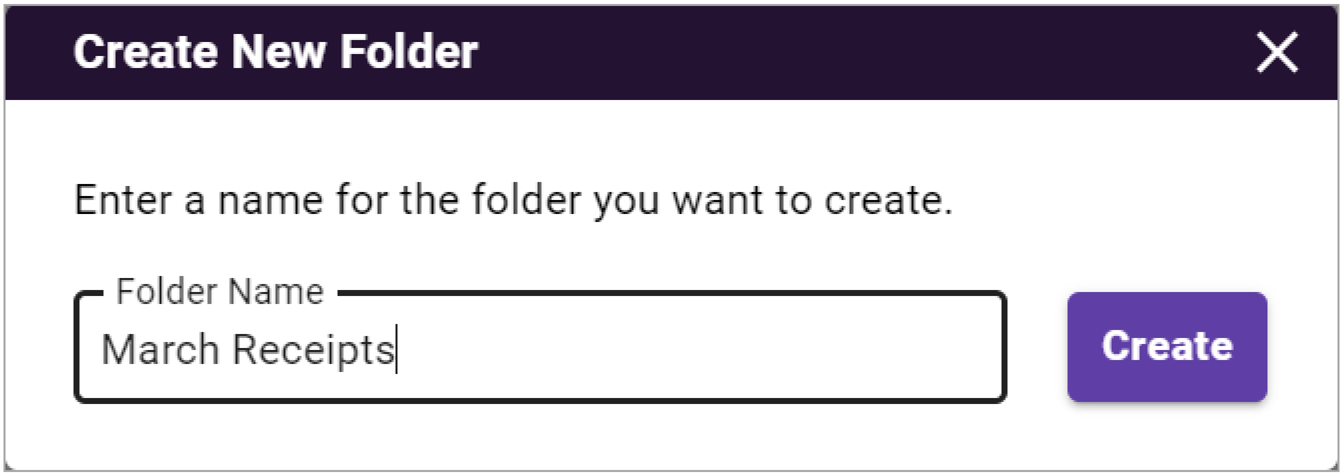
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to WebDAV with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to save both versions.

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

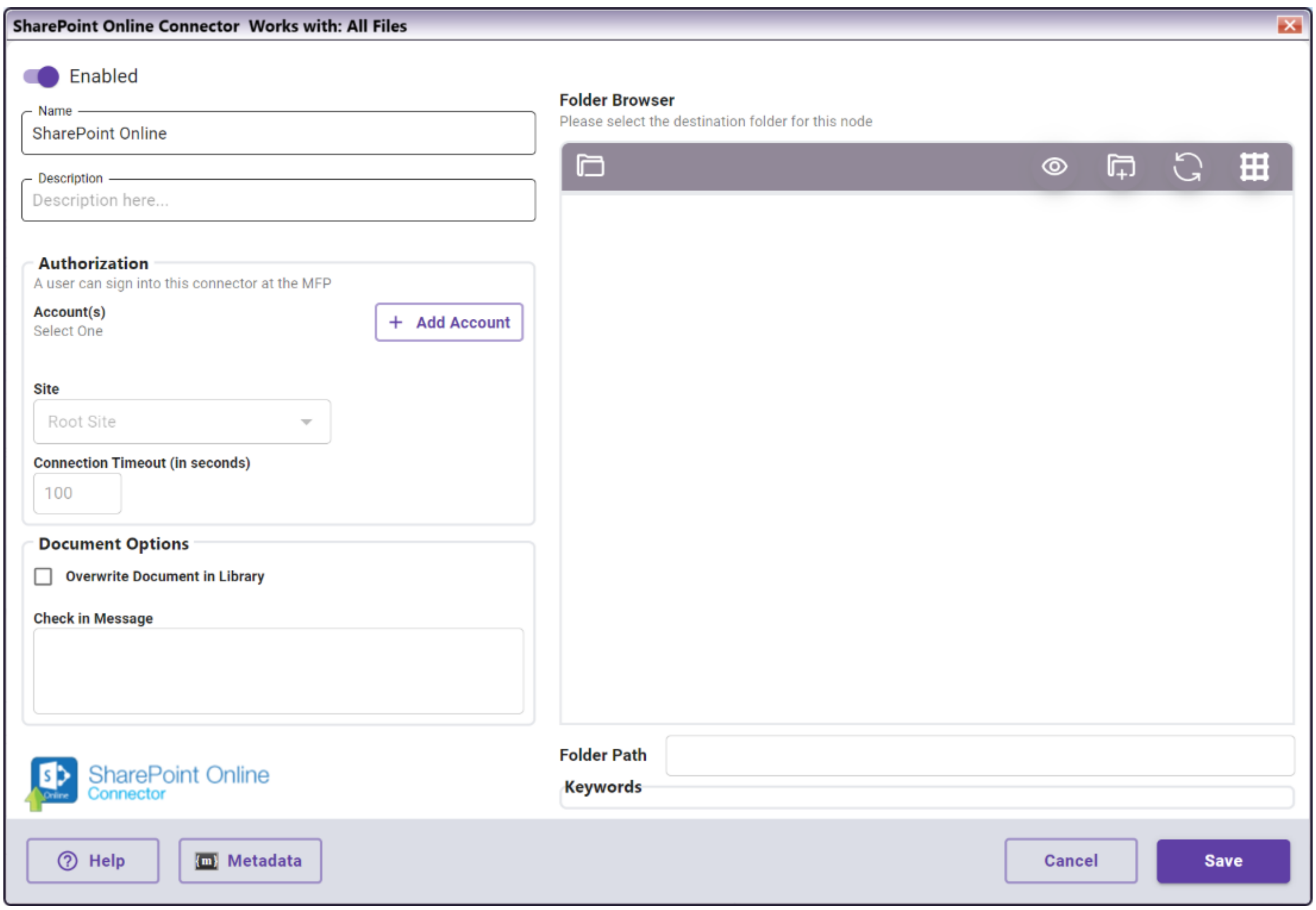
At the MFP, take the following steps:

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

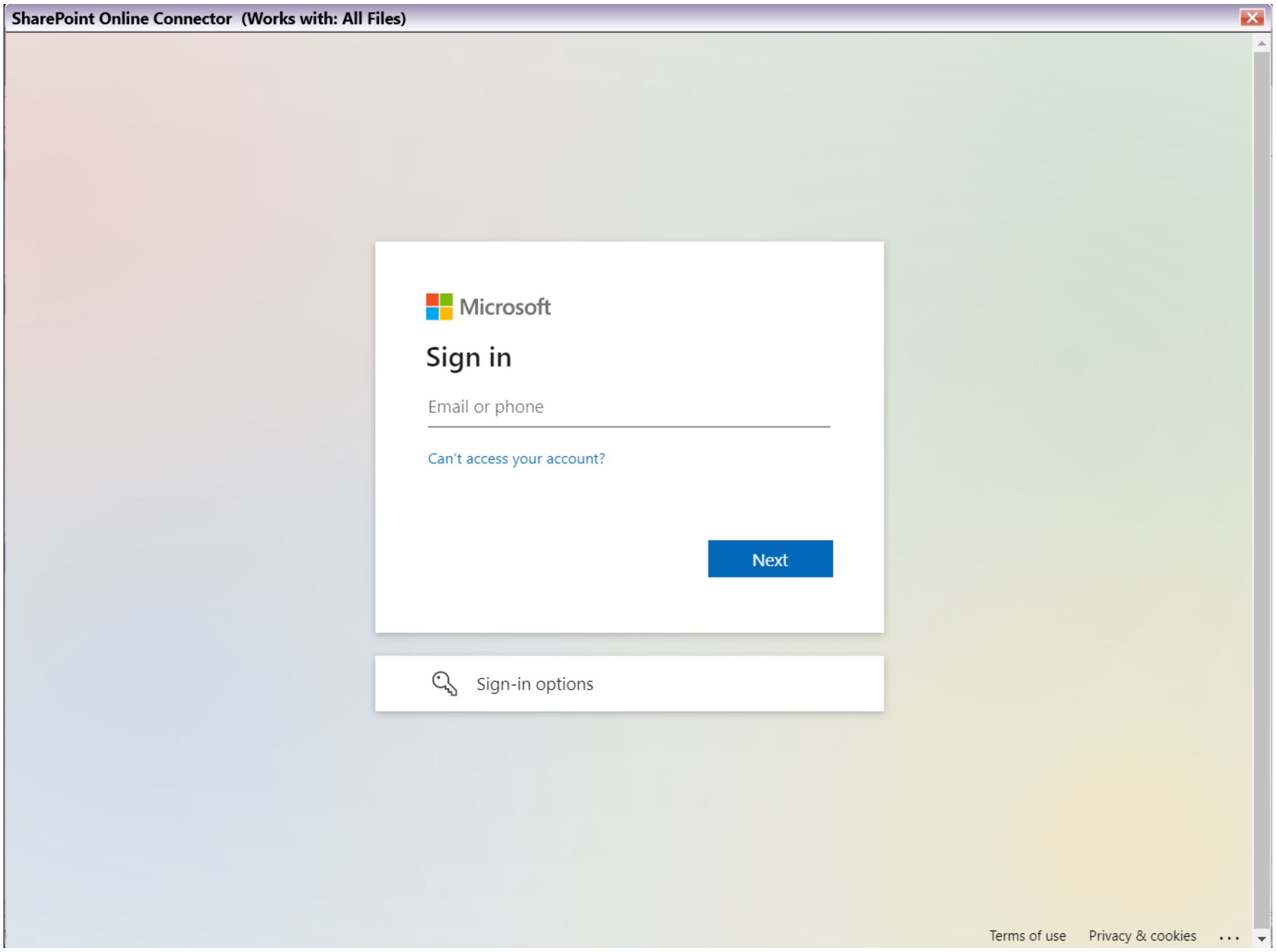
- **Help** - Accesses Online Help.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Authorization

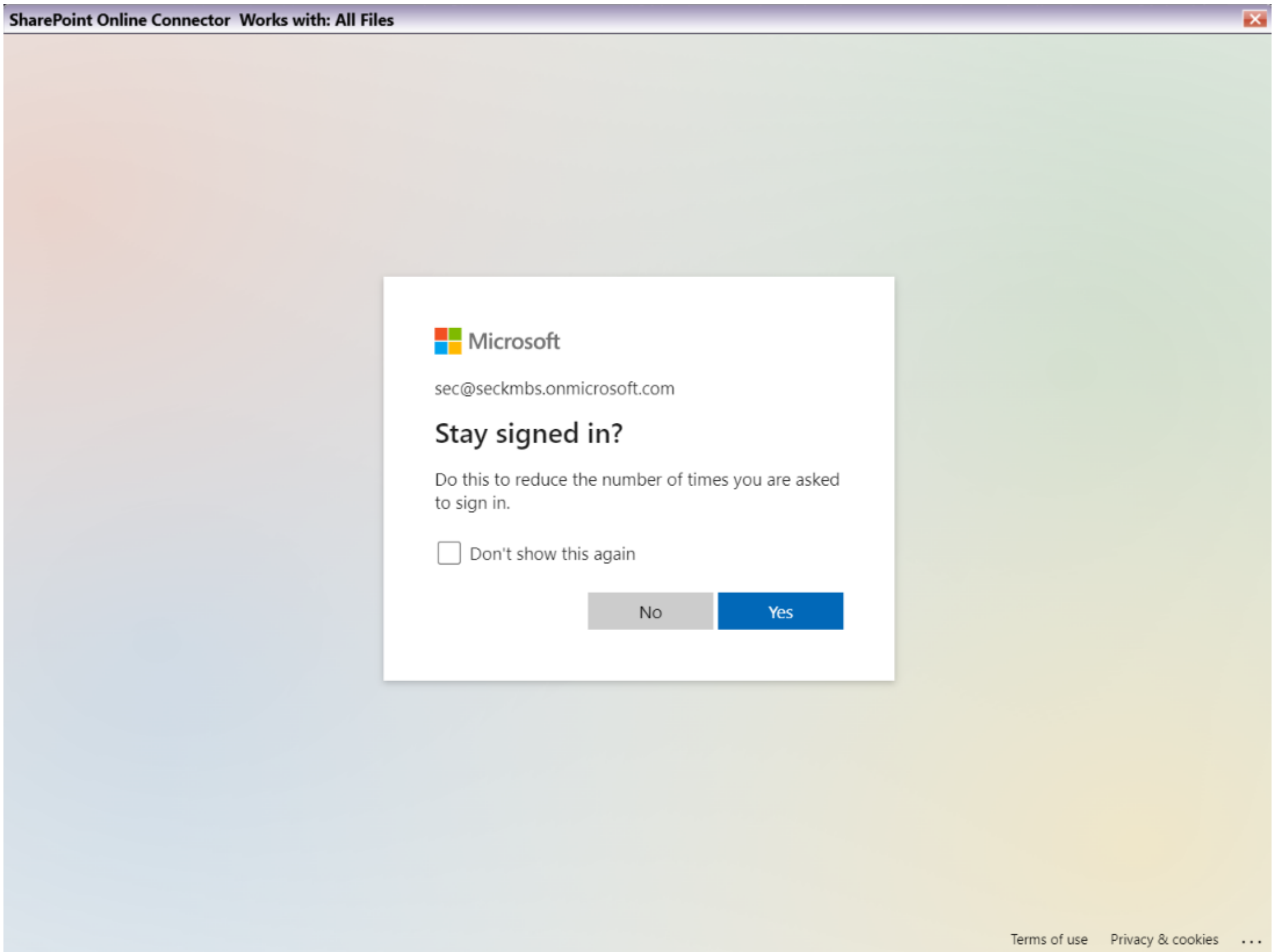
To use this node in a workflow, you must connect it to a SharePoint Online account. Once you connect to an account and save the node, the account will be available for selection the next time you access the node in the current workflow. To connect to a SharePoint Online account, do the following:

To connect to SharePoint Online, do the following:

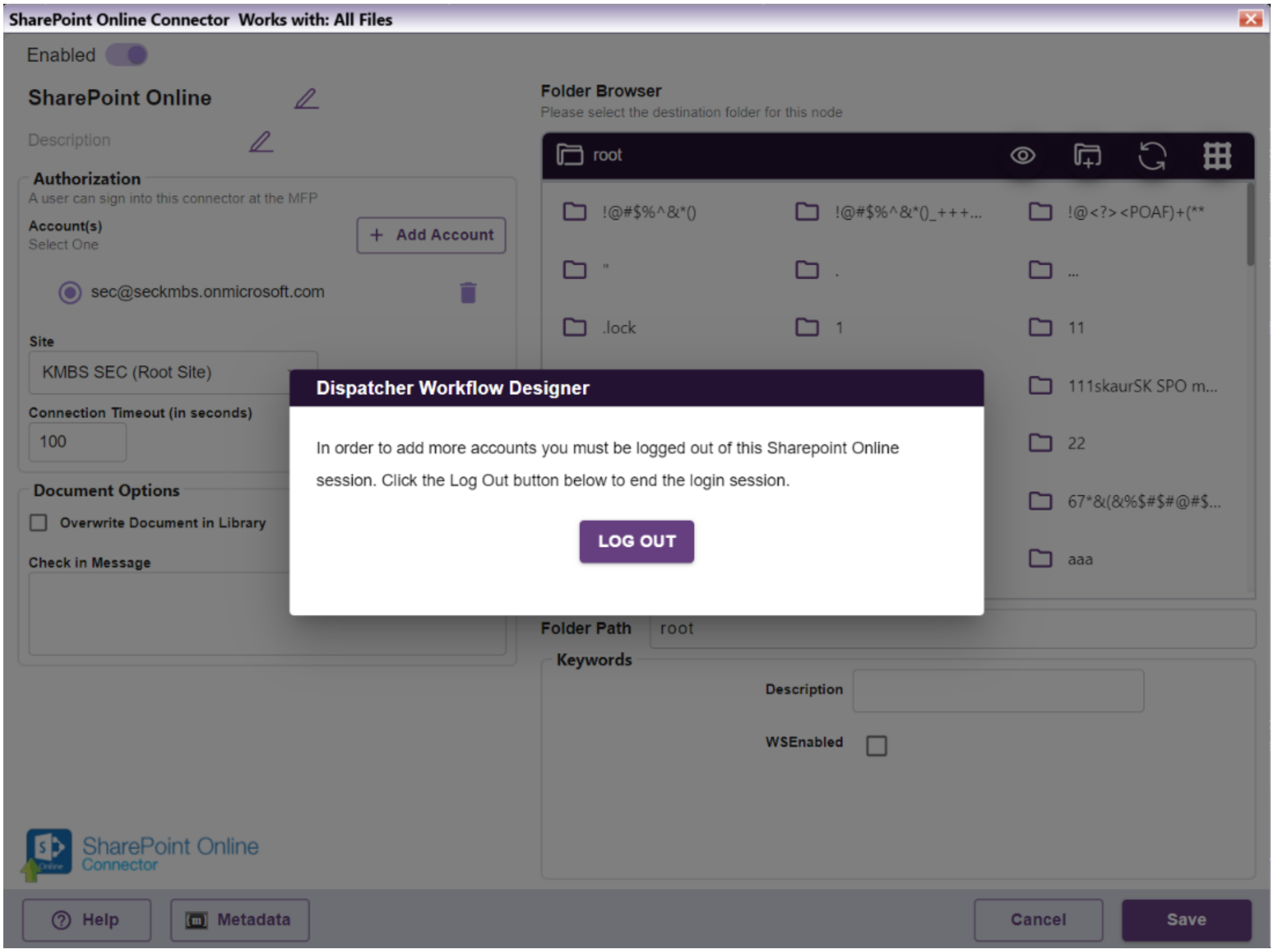
1. 1. Select **Add Account**. The Microsoft login window appears:



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**.



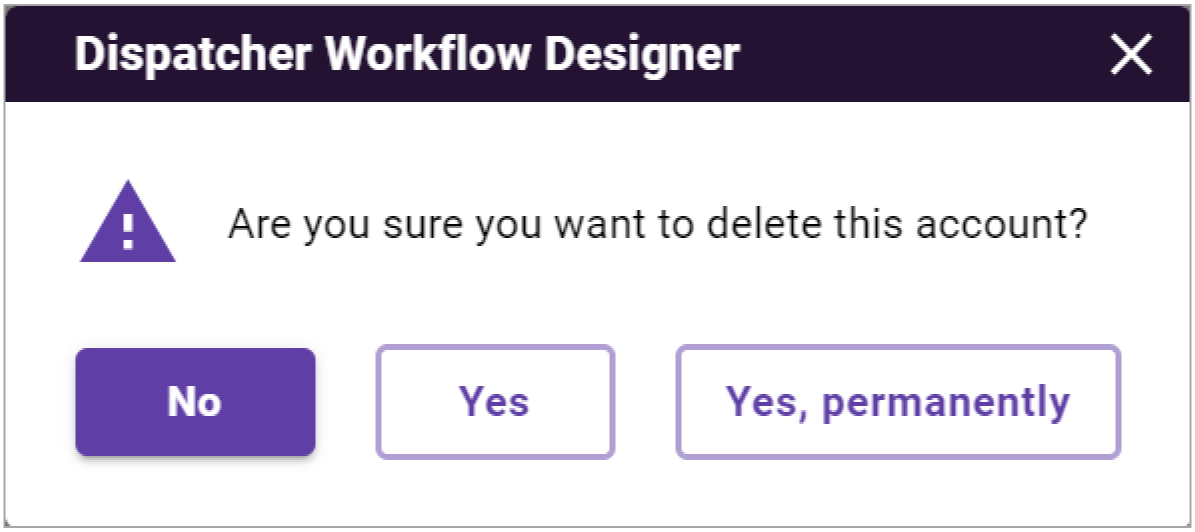
Note: You can add only one OneDrive account per session. To add another OneDrive account, you must save the node and reopen it:



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.

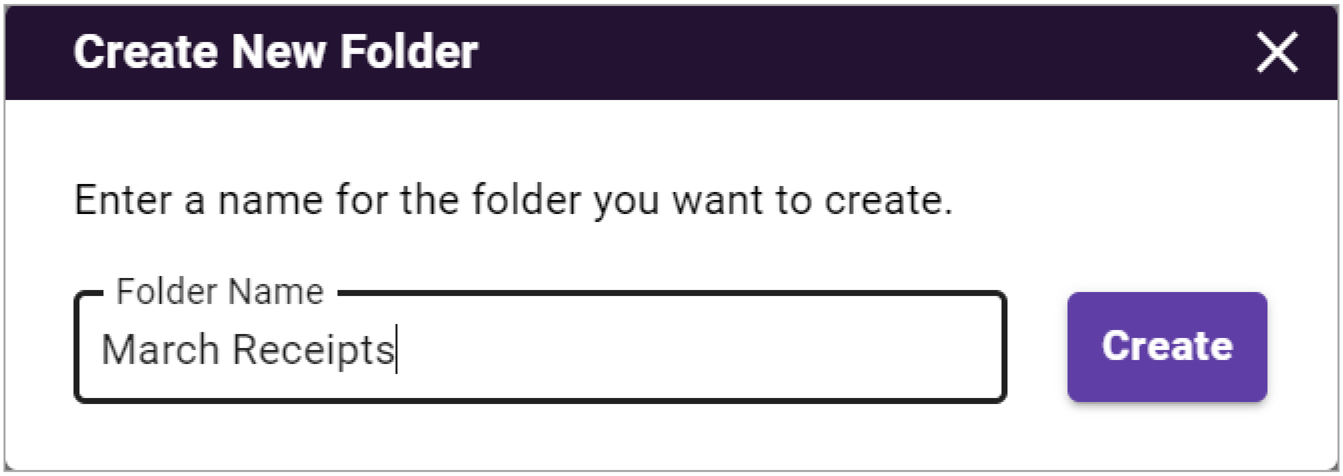
- **Overwrite Document in Library** - By checking this box, a document that is uploaded to SharePoint Online with the same name as an existing document will replace the existing document. By default, this box is unchecked, and new documents with the same name will have a unique number added so as to 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

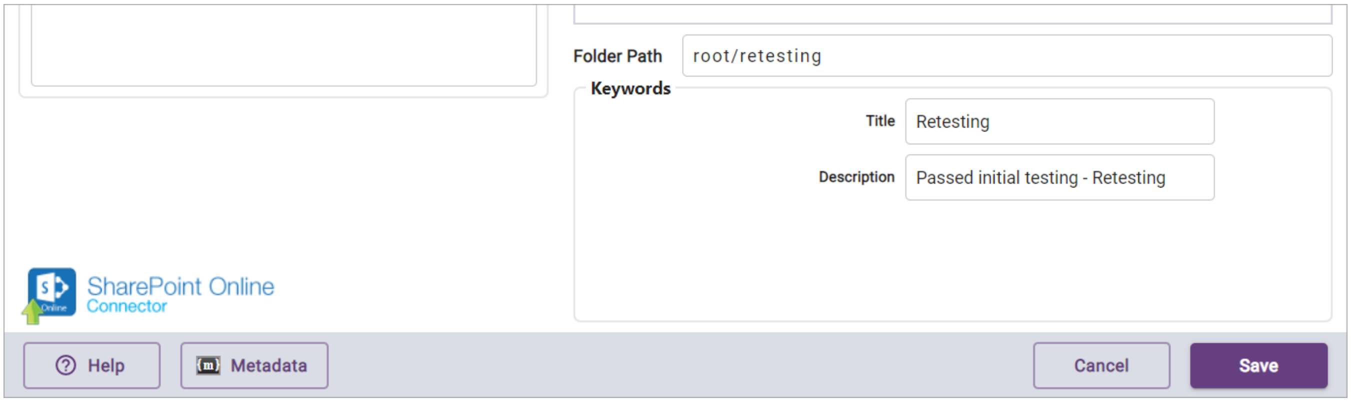
Below the SharePoint Online folder section is an area displaying Keywords, which are metadata tags used within SharePoint Online. Users can configure Keywords in the following ways:

- 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:

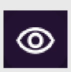
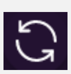
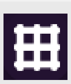
- File names cannot start with a space or end with a space
- Folder names cannot end with a period (.)
- Non-printable characters cannot be included in a file name (tabs, newlines, etc.)
- Do not use any of the following characters: `~ " # % & * : < > ? / \ { | }`

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.

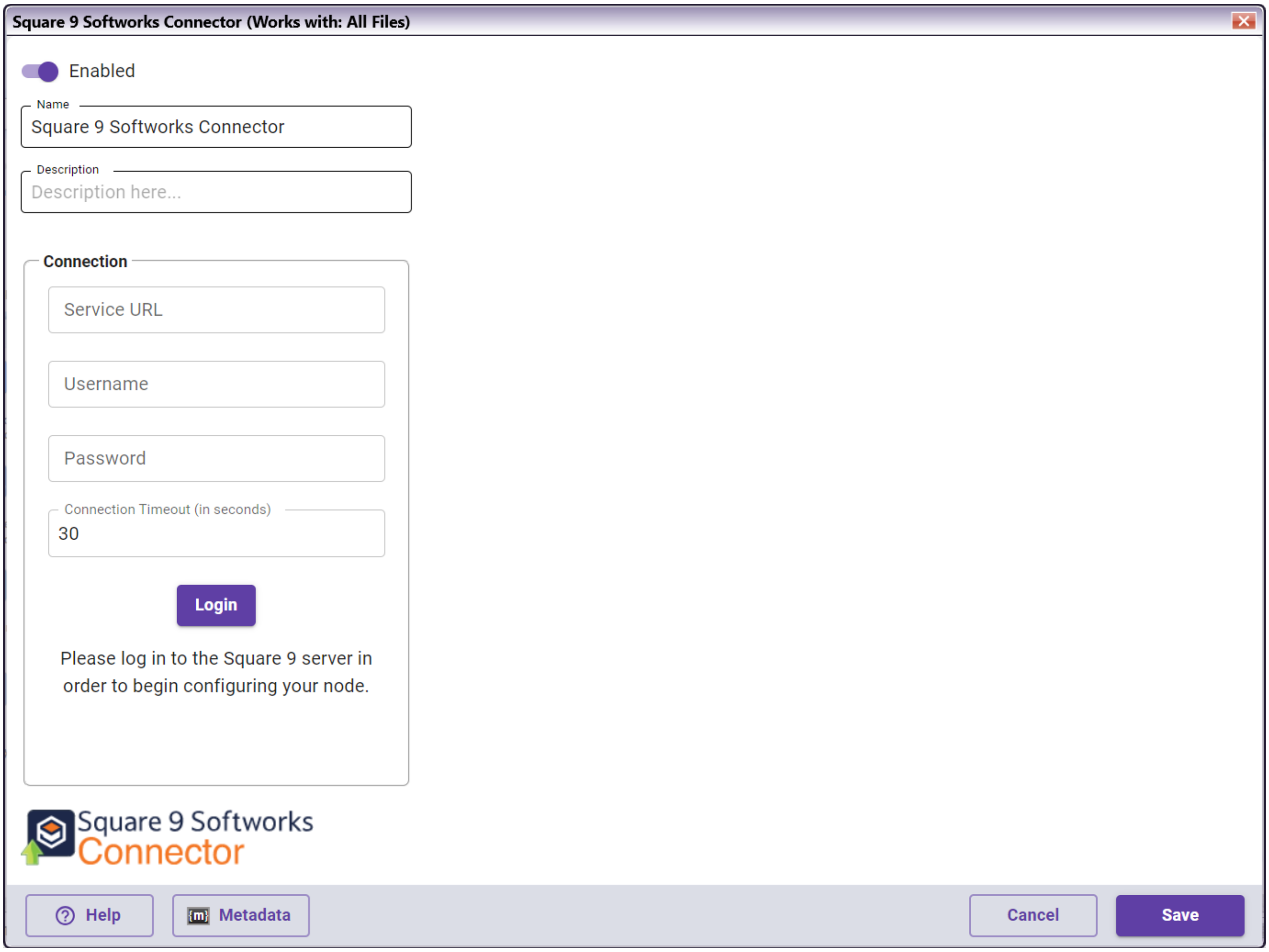
Accessing SharePoint Online at the MFP

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.

Square 9 Softworks Connector

The Square 9 Softworks Connector node allows you to distribute documents to Square 9, a popular AI-powered document processing platform. Documents can be sent to Square 9 via an automated workflow, or you can log into Square 9 directly at the MFP panel.



Configuring the Square 9 Softworks Connector Node

To open the **Square 9 Softworks Connector** node's configuration window (shown above), add the node to your workflow and double-click on it. The following options are available:

- **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. By default, the node name defaults to "Square 9 Softworks Connector", 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.

  This field is optional and is for internal use. That is, it appears only in this window and not in the workflow.

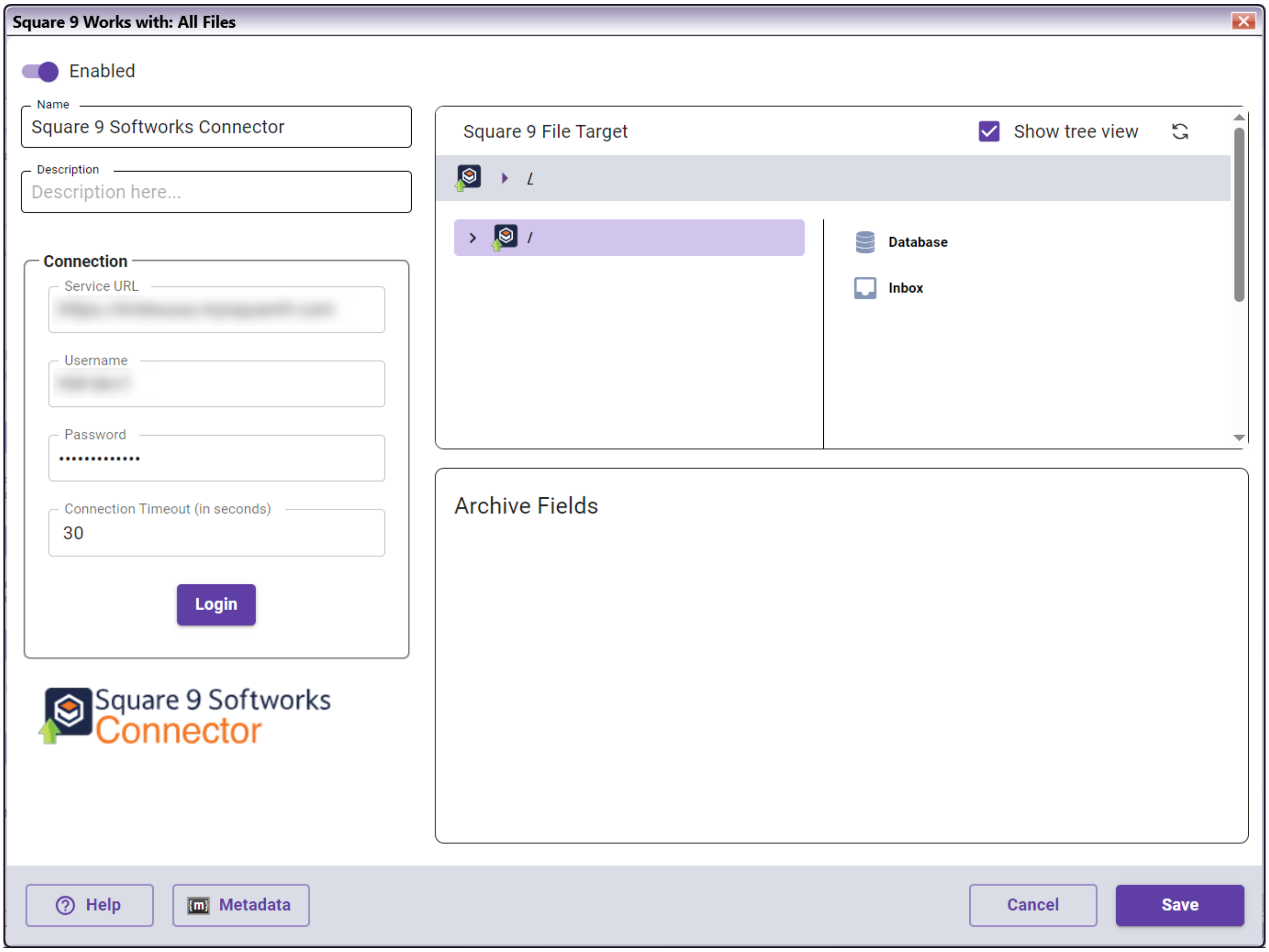
Buttons

- **Help** - To access Online Help, click this button.
- **Metadata** - Accesses the **Metadata Browser**.
- **Cancel** - To exit the window without saving any changes, click this button.
- **Save** - To preserve your node configuration and exit the window, click this button.

Connecting to Square 9

To begin, you must first connect to the Square 9 server. In the Connection area, do the following:

1. In the **Server URL** field, enter the URL of your Square 9 server.
2. Enter your Square 9 server user credentials in the **Username** and **Password** fields.
3. If necessary, update the value in the **Connection Timeout** field.
4. When you are done, select the **Login** button to connect to your Square 9 server.



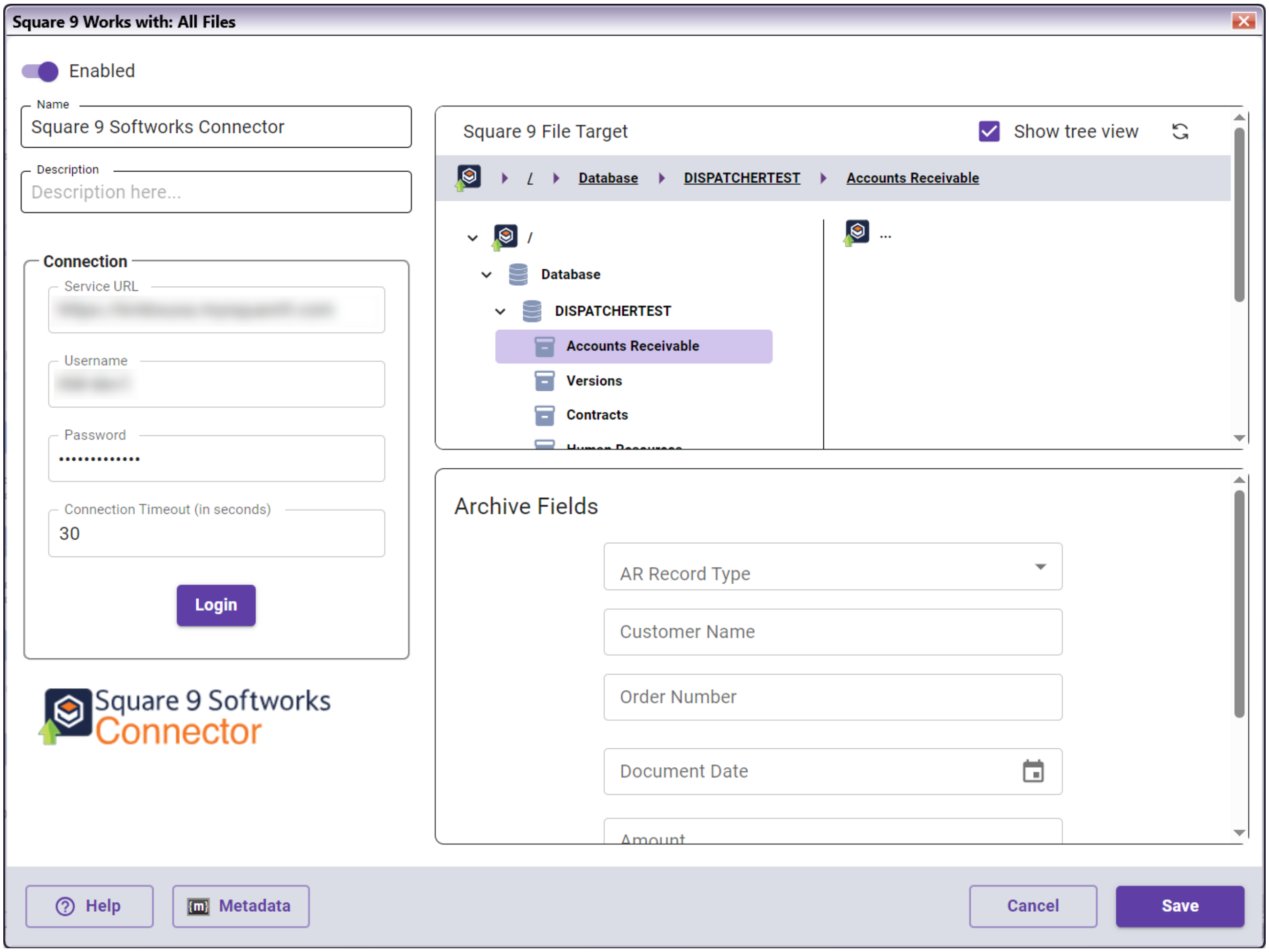
Configuring the Square 9 Softworks Connector

Once connected, the right hand side of the Square 9 node properties window displays a tree-view and listed view of your Square 9 databases and Inboxes. The tree view is **optional** and can be turned off.

Selecting a Database or Inbox

Square 9 organizes documents in two ways: databases and Inboxes. Databases are how Square 9 typically stores documents. Archives exist within databases and act much like folders. Inboxes are temporary repositories where documents can be reviewed by relevant parties before being indexed in a database.

After connecting to the Square 9 server, the databases, Archives, and Inboxes available to the user will appear in the configuration area. Navigate to the repository you would like to save documents to. Note that you must select an Archive or Inbox; selecting a database is not a valid configuration.



Archive Fields

If you selected an Archive to save documents to, the Archive Fields area will populate with the associated fields. Archive Fields contain additional information that is uploaded with the document.

Note: Archive Fields support a single line of text. The maximum length is defined within GlobalSearch, Square 9 Softworks' Enterprise Content Management tool.

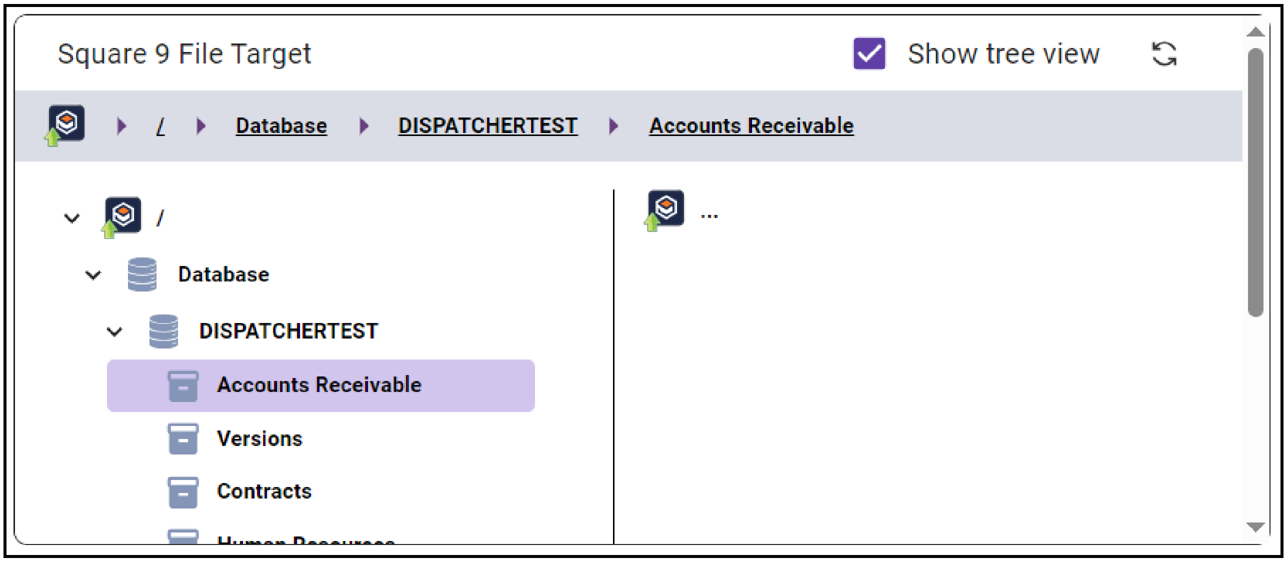
Options

You can adjust the default view of your Square 9 Archives in the node properties window by using the control buttons in the top right hand side of the window. Do the following:

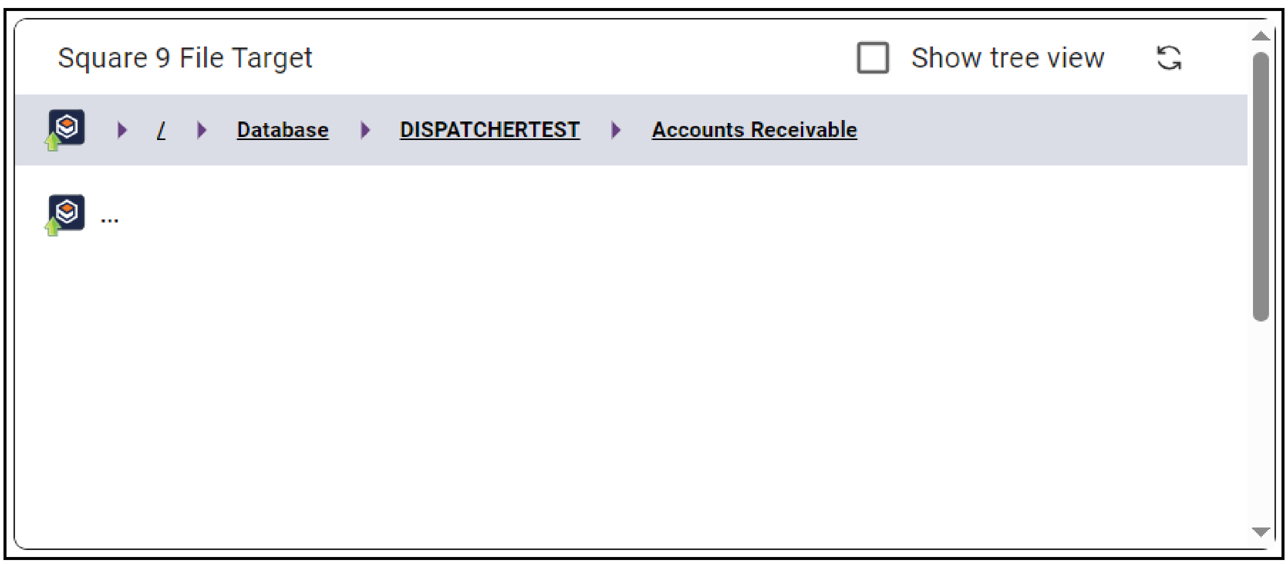
- To turn off the default view, uncheck the **Show tree view** option.

  See the following illustrations for a comparison of the different views available:

  Tree View ON



Tree View OFF



|

- To refresh the node's configuration area and display the most up-to-date databases, Archives, and Inboxes from Square 9, select the **Refresh** option. This will also refresh the Archive Fields section.

Accessing Square 9 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, then select the workflow with the Square 9 node

on the “Select a Workflow” screen.

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 Square 9 Softworks account has been configured, you will only need to select the “Login” button. If an account has not been configured, you will need to enter your login credentials here to proceed.
4. **Select your File Destination** - When you are logged in, you can use the folder navigation to select the destination for your file upload.
5. **Enter Archive information** - After selecting a database or Inbox, the available Archive Fields will appear. Enter any necessary Archive Field information.
6. **Select the “Scan” button** - This will send the scanned document to the selected Square 9 destination.

Outputs

Output Formats

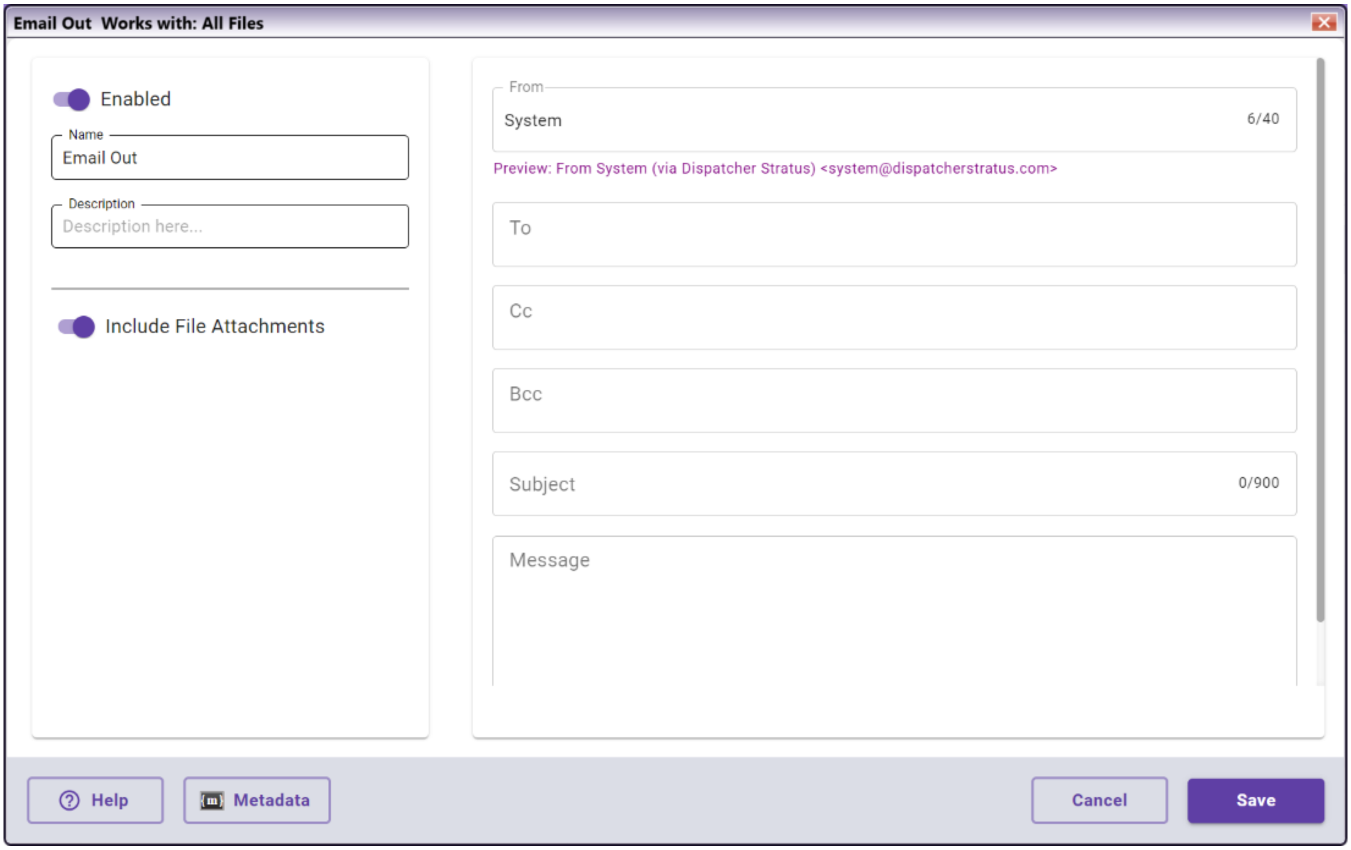
Output nodes distribute files in formats compatible with various databases or email services. These output nodes require a connection to the output to properly distribute files. Outputs include:

- **Email Out**
- **End Node**

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.

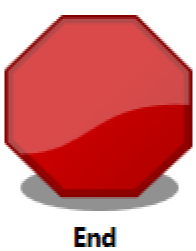
- **Cancel** - Exits the window without saving any changes.
- **Save** - Preserves your node configuration and exits the window.

Node Workspace

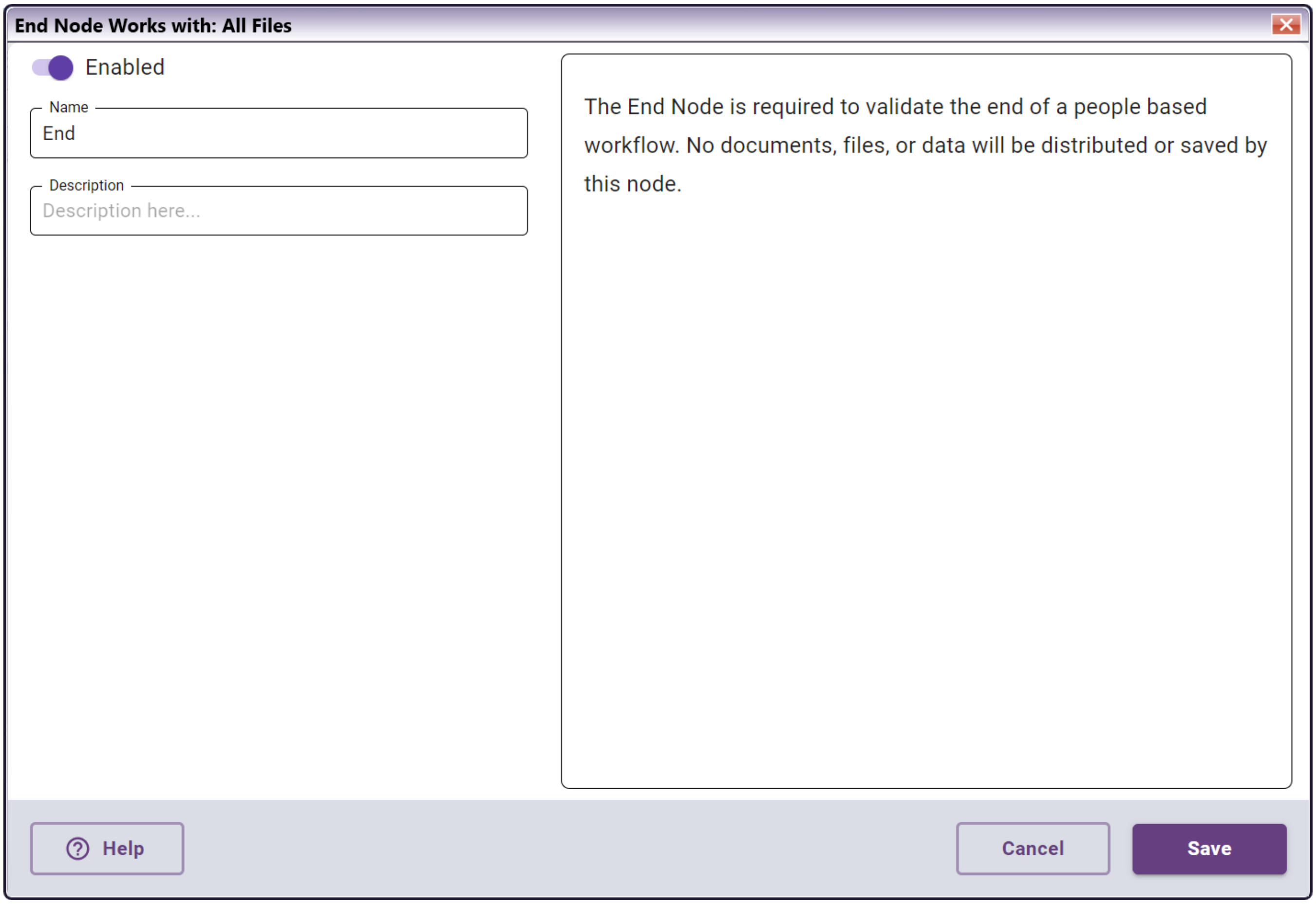
Use this area to specify your preferences for the outgoing email. You have the following options:

- **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.

End Node



Use the End Node to terminate a workflow that does not have any documents that need to be saved or distributed. The End Node is typically used to end a Dispatcher Stratus workflow that uses any of the **People Nodes**.



Configuring the End Node

The End node cannot be configured in any way. However, Dispatcher Stratus requires this node to end a workflow that has no other distribution nodes.

To open the node's configuration window (shown above), add a distribution node for End 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”.
    - 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.

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.

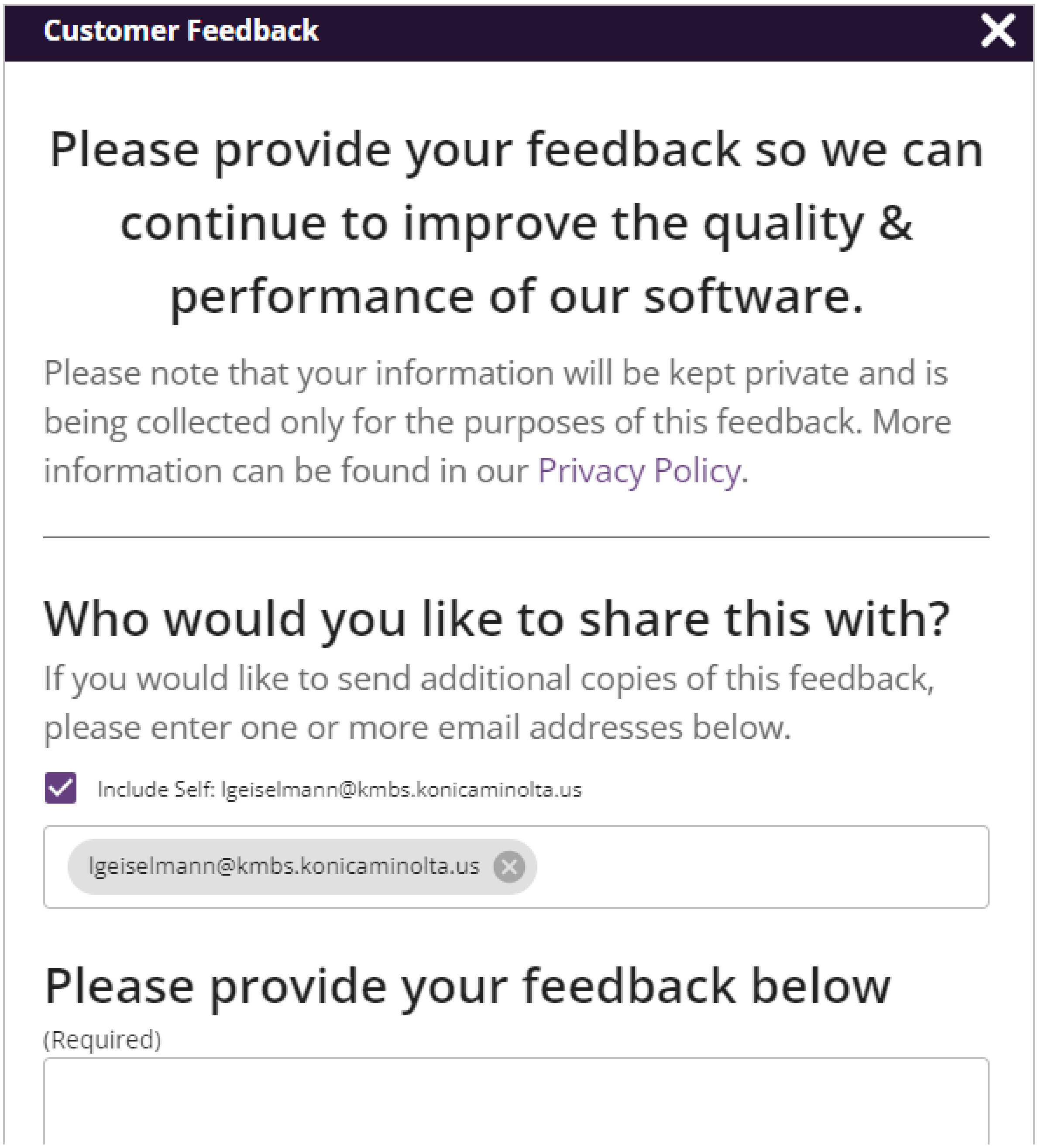
Reference

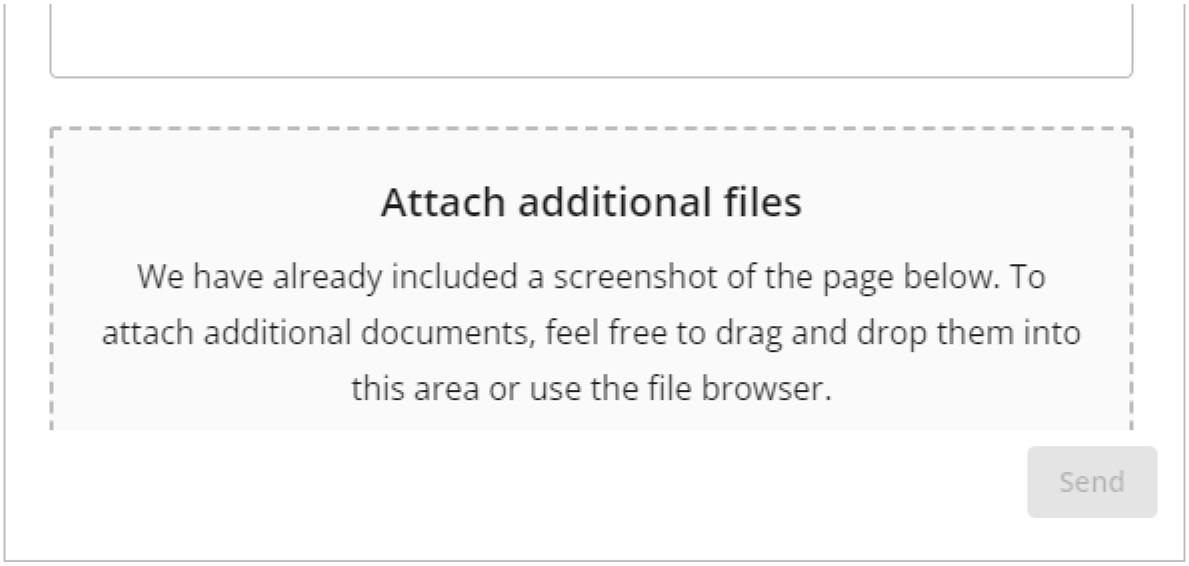
Customer Feedback

Customer Feedback

To send feedback about Dispatcher Stratus , 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 Stratus 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 Stratus create folders dynamically?

2. Are there limits to the size of one workflow?

3. What on-premise infrastructure do I need to use Dispatcher Stratus?

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 Stratus create folders dynamically?

Yes. Using Dispatcher Stratus , 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 Stratus 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 Stratus?

None! As a true cloud-based solution, Dispatcher Stratus 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 Stratus workflow.
Connector (Node)	A type of distribution or output node that allows Dispatcher Stratus 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 Stratus 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 Stratus 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 Stratus is linked to.
MarketPlace	Konica Minolta's MarketPlace is an online store where licenses for many apps and programs can be purchased, including Dispatcher Stratus .
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 Stratus , 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 Stratus , MFPs should have the [**Dispatcher Stratus App**](../../getstart/sec.iws/) installed.

Privacy Policy

This Privacy Policy covers the websites and applications of Konica Minolta Business Solutions U.S.A., Inc. (“Konica Minolta” or “we”) that link to this Policy, including All Covered, Konica Minolta’s IT services division, and Depth Security. This Privacy Policy also applies to Konica Minolta’s marketing, advertising, and employment practices where and when it is referenced. It is meant to inform you about our collection and use of your personal data.

Personal Data We Collect

You may choose to give us personal data to allow us to communicate with you, process your orders, provide you with services, or for employment consideration. Data we collect depends on the context of your interactions with Konica Minolta, the choices you make, including your privacy and browsing settings, and the products and features you choose. The personal data we collect may include the following:

Name and Contact Data. Your first and last name, email address, postal/billing address, phone number and other similar contact data in order to communicate with you, process orders or provide you with products or services. We may also collect your employer's name, if you are procuring products or services on behalf of an organization, employer's address, and information related to your prior purchases and online buying preferences. Some forms may ask for your customer number or product details such as a serial number.

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.

Payment Data. Data necessary to process your payment if you make purchases, such as your credit card number and the security code associated with your payment card.

Location Data. We may collect data about your location, which can be either precise or imprecise. Precise location data includes Global Navigation Satellite System (GNSS) data (e.g. GPS), as well as data identifying nearby cell towers and Wi-Fi hotspots, that we collect when you enable location-based products or features. Imprecise location data includes, for example, a location derived from your device or data that indicates where you are located with less precision, such as a city or postal code or an IP address.

Social Media Data. We may provide social media features that enable you to share information with your social networks. Your use of these features may result in the collection or sharing of information about you by the social networking site. Please review the privacy policies and settings of social networks you use to understand their practices.

Job Applications/CVs/Resumes. Information on job applications/CVs/resumes which you provide to us if you submit a job application to Konica Minolta either directly or indirectly. You acknowledge that your application may include sensitive personal data. Konica Minolta uses this information in order to evaluate your application and perform related employment activities.

Feedback and Product Reviews. Information you provide to us and the content of messages you send to us, such as feedback and product reviews you write, blog posts or questions and information you provide for customer support. When you contact us via our website, a Konica Minolta application, or a Help Desk for such things as customer support, your phone conversations or chat sessions with our representatives may be monitored and recorded. Your feedback, posts and reviews will be used to make improvements in our products and services.

Website Browsing. Information about your visits to our websites and your browsing patterns. This may include data about your device, including Internet Protocol (IP) address, browser type, and regional and language settings. This is more fully described under the section entitled "Cookies, Web Beacons and Privacy Choices" below. We collect this information to determine such things as the number of visitors to various parts of our websites, to personalize your experience on our sites, and to tailor our interactions with you.

Products. Certain Konica Minolta products collect data, such as product registration, meter reads, supply levels, equipment configuration and settings, software version, and fault codes. Konica Minolta uses this information for product improvement, billing, report generation, supplies replenishment and support services.

Third Party Sources. We also obtain data from third-parties. These third-party sources vary over time, but they are sources deemed credible by us and may be publicly available or available on a commercial basis. They may include:

- Data brokers from which we purchase demographic data to supplement the data we collect;
- 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 Stratus . 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 Stratus** 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 Stratus** 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	MyTest, test
2	latest, test	latest, test
4	testing	testing
5		Test
6		Test
7		Test
8		Test
9		Test

To search for the word “test” it needs to be delimited with the word boundary operator \b, as such, a search using the string “\btest\b” will return the following results:

Line	Match Case	Do Not Match Case
1	test	test
2	test	test
5		Test
6		Test
7		Test
8		Test
9		Test

To locate multiple strings with a numeric value the “\d” operator can be used. Using the search string “Test #\d” will produce the following result:

Line	Match Case	Do Not Match Case
5	Test #1	Test #1
6	Test #2	Test #2
7	Test #3	Test #3
8	Test #4	Test #4
9	Test #5	Test #5

File Name Search

The Parse Node has the ability to search for file names using regular expressions. Unlike the other parser nodes which operate on the contents of files, the Parser Node operates on file names.

For example, with the following list of files:

testfile1.txt

testfile2.xls

testfile3.docx

testfile4.doc

testfile5.psd

testfile6.pdf

testfile7.jpg

testfile8.tiff

Using a search string of “testfile\d” would match all of the files in the preceding list.

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\[\]|\\-}
  ```