




# Dispatcher Phoenix

## Quick Reference

### Overview

Dispatcher Phoenix is a bEST-certified family of workflow automation software products designed to streamline and simplify document processing challenges in the workplace. With its flexible architecture, easy-to-use application interface, powerful document processing features, and automatic system of file collection and distribution, Dispatcher Phoenix can optimize business processes for any organization.



#### File Collection

In a Dispatcher Phoenix workflow, files are received:

- From **network and local folders**.
- From MFP **User Boxes**.
- Directly from an **MFP running bEST**.
- As print jobs from an **LPR Client**.
- As **emails** scanned from an MFP.
- Etc.

#### Processing

A variety of document processing tasks are available to work on incoming scanned images, PDFs, PostScript files, etc.

#### File Distribution

Files can be distributed:

- To **network and local folders**.
- To an **MFP for printing** (Windows, LPR, or RAW).
- To an **FTP Server**.
- Via **email**.
- Other **connectors**.

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# Dispatcher Phoenix Industry Solutions

Whether it's freeing up office staff from having to perform redundant, manual work, reducing costs by eliminating the need for outsourcing, or boosting productivity by customizing print jobs without changing work environments, Dispatcher Phoenix has the right solution for you to better manage your business processes.

## CHALLENGE: MANAGING DOCUMENTS



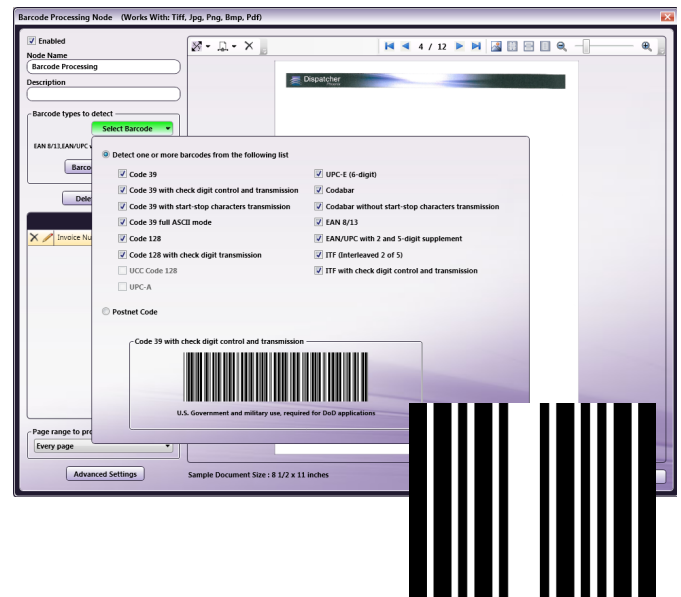
A major university needs to archive a huge amount of student information, including transcripts, exams, admission forms, and other student records, but managing these resources is time-consuming and laborious.

## SOLUTION: BARCODE PROCESSING

Using Dispatcher Phoenix's barcode processing feature, each student can be assigned a barcode which can be used to organize and route their academic material accordingly. Dispatcher Phoenix can read the barcodes and use that information to route, rename, annotate, and Bates stamp files. Barcodes can also be used to indicate document breaks and automatically split multi-page files.

For example, a stack of documents consisting of multiple student records can be sent to Dispatcher Phoenix for processing. Dispatcher Phoenix can identify where the barcodes are and split the documents into multiple files by the barcode. Dispatcher Phoenix can then process the files based on any rules created in the Workflow Builder for the barcode.

This functionality also comes with a Barcode Generator Tool, which allows you to generate your own barcode cover pages and labels to be used whenever documents are scanned.



## CHALLENGE: DIGITIZING FILES



A mortgage company is looking for the best way to handle the hundreds of documents that come into the office every day. Whether it's loan applications, bank transactions, or policy forms, these files are taking up a lot of room and their file cabinets are already at full capacity.

### SOLUTION: SCAN, PROCESS, & DISTRIBUTE

With Dispatcher Phoenix, files can be quickly scanned and automatically stored in a variety of locations, including network folders, local folders, FTP sites, etc. Users can scan documents directly into a workflow from the control panel of an MFP. Files can also be collected from a folder on your Desktop, an MFP's User Box, or received as print jobs from an LPR Client or as emails scanned from the MFP.



## CHALLENGE: FINDING IMPORTANT INFORMATION



During discovery and trial preparation, legal associates spend hours sorting through documents looking for relevant information, and since most submissions from opposing council tend to be paper-based, it can become a labor-intensive job riddled with human errors.

### SOLUTION: KEYWORD SEARCHING

Using Dispatcher Phoenix, there are multiple options for finding important information. You can convert scanned documents automatically to PDF Searchable, which will allow you to perform keyword searches on files and easily find the information that you need. The Convert to PDF process also includes advanced features, such as removing any blank pages in the outputted file, password protecting the PDF output, and auto-rotation.

Or you can set up keyword search rules to perform other functions (e.g., organize files based on content, email files, highlight, redact, strikeout, etc.) With Dispatcher Phoenix, all of this can be done automatically.



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## CHALLENGE: BATES STAMPING

Documents coming into a law firm need to be Bates stamped with the appropriate case number but this process is costly and slow, requiring either outsourcing or using up a lot of in-house talent to manually place stamps on each page.

### SOLUTION: AUTOMATED BATES STAMPING

With Dispatcher Phoenix Legal, Bates stamping is quick and easy. Bates stamps can be placed anywhere on the page and customized to include static text, three different kinds of counters, page numbers, file information, and much more. You can rotate stamps, apply color to the stamp content or background, and shift/shrink the page content for the utmost in Bates stamp flexibility.

For your convenience, this Bates stamping feature is available as a fully automated process with no human intervention required and also from the MFP panel where an individual can make changes as needed. Applying, creating, editing, or removing a Bates stamp is now as simple as tapping a few buttons on the MFP panel!

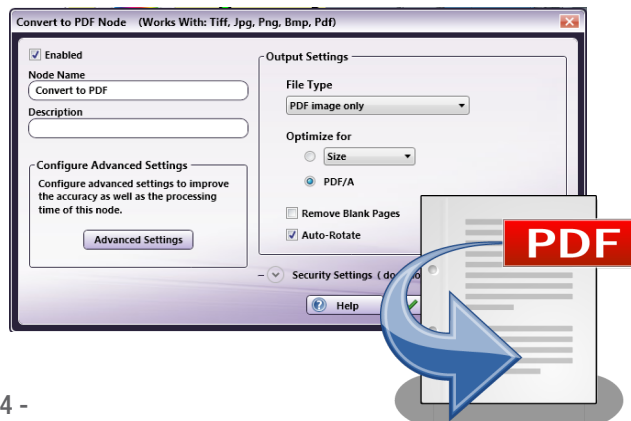


## CHALLENGE: ACCESSING RECORDS IN THE FUTURE

Medical professionals need digital access to their patients' medical histories in a format that will always be readily available.

### SOLUTION: CONVERT TO PDF/A

Dispatcher Phoenix's Convert to PDF process includes an option to convert incoming files to PDF/A, the standard for reliable file archiving. This ability to convert to PDF/A meets the rising demands for electronic document storage, saving files for long-term archiving, and eliminating the need for expensive off site record storage.



## CHALLENGE: IDENTIFYING DOCUMENTS

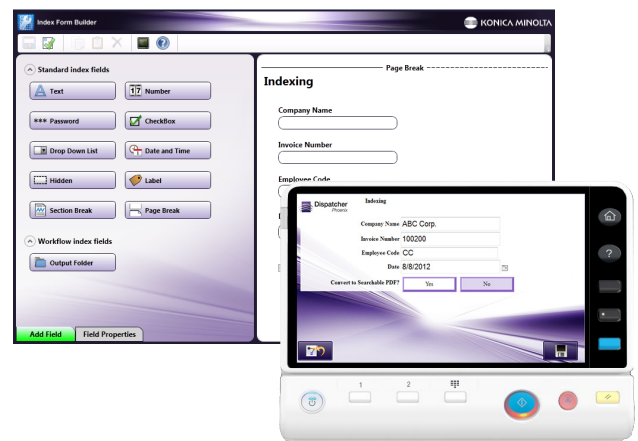


Employees at a large manufacturing firm need to index their engineering drawings, proposals, and specifications to identify them by project and customer for easy retrieval in their document management system.

### SOLUTION: INDEXING AT THE MFP PANEL

Dispatcher Phoenix allows you to index your scanned documents directly from the MFP panel, identifying metadata to be associated with the document. At the time of scanning, you can also choose other document processing tasks to be performed on the scanned files, such as convert to PDF or Microsoft Office format.

To make indexing even speedier, support for database lookups is provided to eliminate the need for manually entering information. With database lookups, fields will be auto-populated based on other selections made at the MFP panel. For example, if you select a customer name, Dispatcher Phoenix can look up the customer's address and populate another field with that information — automatically.



## CHALLENGE: EDITING SCANNED DOCUMENTS



Staff members at a real estate firm need to be able to modify their scanned documents but retyping documents takes too long.

### SOLUTION: CONVERT TO MICROSOFT OFFICE

Transform your paper documents into editable files with Dispatcher Phoenix's automatic Convert to Microsoft Office process, which converts scanned image files and PDFs to a wide variety of formats, such as Microsoft Word, Excel, and PowerPoint. Support for Office 2010 is also included (\*.docx, \*.xlsx, \*.pptx).



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### CHALLENGE: FILING DOCUMENTS



Insurance agents and brokers work with insurance claims, reports, and policy statements every day - filing, copying, and filing again. This paper-based workflow results in poor document management with files getting lost, documents becoming misfiled, and disorganization all around.

#### **SOLUTION: FOLDER BROWSING AT THE MFP**

Convert your paper documents to electronic file format and route them to the appropriate folder location on your PC or network with a tap of the button at the MFP! With Dispatcher Phoenix's folder browsing feature, you can browse through your PC's folder structure at the MFP, choose the appropriate folder in which to store the documents, tap on a button and by the time you return to your PC, your files will be scanned, processed, and routed to the correct location.



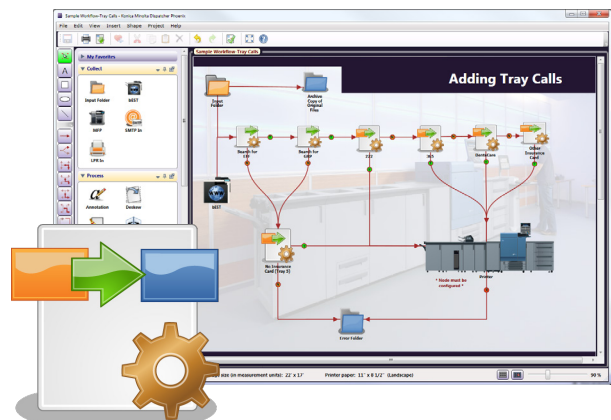
### CHALLENGE: SETTING UP SPECIALIZED PRINT JOBS



A busy production print shop is spending way too much time and too many resources manually setting up their specialized print jobs.

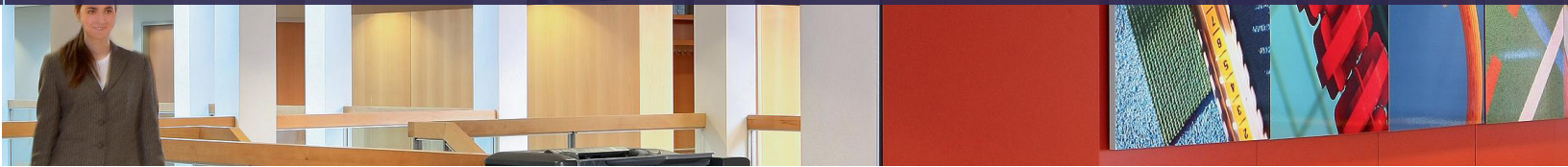
#### **SOLUTION: FILE PARSING TOOLSET**

Use Dispatcher Phoenix Professional's powerful parsing tools to evaluate, modify, and route ASCII-based files (text, PostScript, PCL, etc.) based on specific conditions. These parsing tools can be used to insert paper tray commands, set finishing options, set output quantities, set job attributes, and much more.



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## CHALLENGE: HIDING CONFIDENTIAL MATERIAL

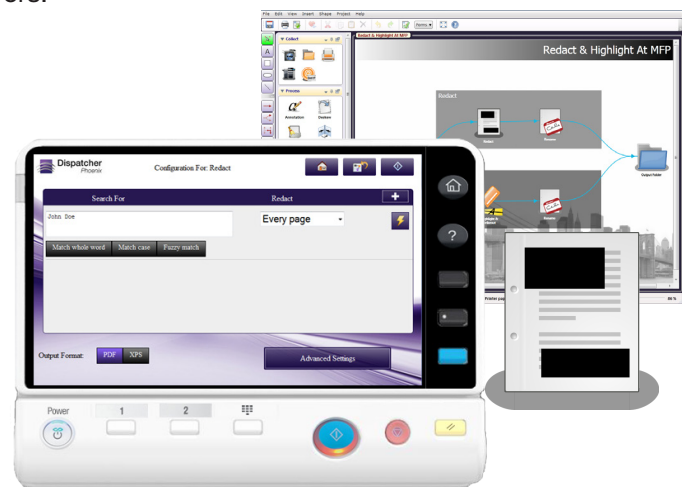


Lawyers, doctors, and other professionals need to ensure that any privileged information within their shared documents remains protected; however, redacting using special pens or preprinted labels is a time-consuming, tedious task and opens up the possibility of errors.

### SOLUTION: INTELLIGENT REDACTION

With Dispatcher Phoenix's automatic redaction process, you can realize cost-savings while increasing your productivity as well. Just set up specific search terms to redact and let Dispatcher Phoenix Legal do the rest. Once redacted, information is permanently removed from the document and cannot be retrieved in the future.

Along with redaction, Dispatcher Phoenix Legal includes a **Highlight/Strikeout** process that allows you to mark up essential text in the document. All of these features are available via automatic processing as well as via human intervention from the MFP panel.



## CHALLENGE: ADVANCED PROCESSING OF SCANNED ATTACHMENTS IN EMAILS



Security concerns at a governmental agency have eliminated all methods of scanning from MFPs with the exception of scanning to email.

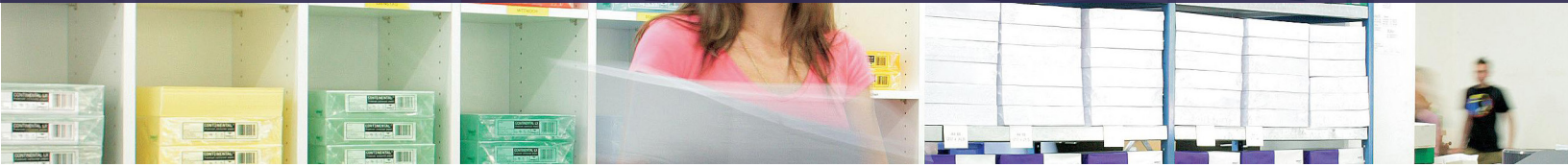
### SOLUTION: SMTP IN AND EMAIL PARSING

Dispatcher Phoenix offers an SMTP In collection node in conjunction with an Email Parser processing node for a complete email processing solution. The SMTP In node acts as an "email listener," receiving emails from an MFP into the workflow. The Email Parser, in turn, extracts the email attachments based on preconfigured rules to forward them along in the workflow for processing and/or distribution.



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### CHALLENGE: MAXIMIZING PRINT RESOURCES



In keeping up with all of the student record paperwork that they receive, administrators at the district school system need to make sure that they are sending their files to the most appropriate production printer to avoid wasting money.

#### SOLUTION: COLOR & PAGE COUNT ROUTING

Dispatcher Phoenix offers Color Routing and Page Count Routing processes which will save any organization both time and money. With these processes, files are easily and quickly routed based on the number of pages in each document, the number of color pages, or the percentage of color in the job, ensuring that you are using the most suitable printer for the job.



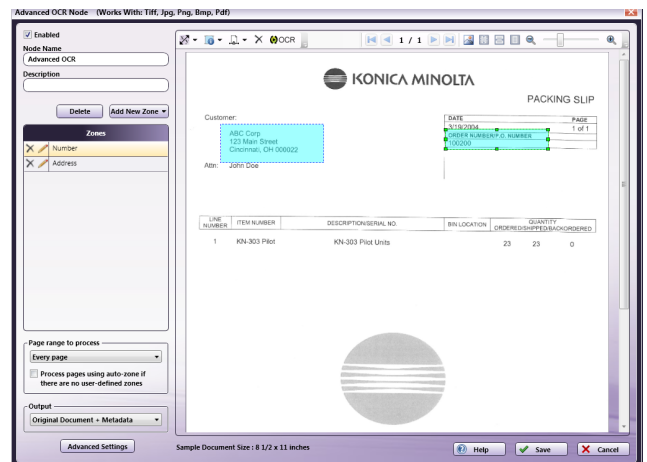
### CHALLENGE: STREAMLINING DATA ENTRY



A freight management company needs to automate their manual data entry tasks to streamline their accounting processes.

#### SOLUTION: OCR

With Dispatcher Phoenix's advanced full page and zonal OCR functionality, the need for rekeying information is eliminated. Using zonal OCR, specific data can be extracted from invoices, such as invoice number, date, and amount, for import into other systems.





## Dispatcher Phoenix Qualifying Questions

1. Would you like to be able to browse for folders on your PC Hard Disk Drive or a Network Share right from the MFP so that you can scan your files directly into their final location?
2. Would you like to use barcodes to simplify having your files processed automatically?
3. Would you like to convert scanned documents to editable or searchable file formats and receive them on your PC, already opened in their associated applications (Microsoft Word, Adobe Acrobat, etc.)?
4. Do you need to index your documents at scan time for future use in a document management system?
5. Do you currently use a manual process to Bates stamp, annotate, watermark, highlight or redact your documents? Do you outsource these tasks?
6. Would you like the ability to customize your Bates stamps and have Dispatcher Phoenix automatically Bates stamp your scanned files?
7. Would you like the ability to customize what text should be redacted and/or highlighted at the MFP panel and have Dispatcher Phoenix automatically search and redact/highlight your scanned files for the text specified?
8. Do you need to have your scanned documents automatically converted to searchable formats like PDF Searchable?
9. Do you need to further process emails from an MFP prior to being sent?
10. Do you need to extract data from your documents for future use in other systems?
11. Do you have a need to send scanned documents from the MFP to other systems (e.g., document management systems)?
12. Do you have repetitive, manual tasks that use up a lot of resources and time to complete?

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### Dispatcher Phoenix Qualifying Questions (cont'd)

13. Does someone in your organization spend a lot of time sorting through paper documents and distributing them to various departments?
14. Do you need to convert paper documents to electronic files and automatically distribute them to a local or network folder, FTP server, or email address?
15. Does your organization need to comply with PDF/A electronic file format requirements?
16. Do you need to modify print files before they are sent to the printer (e.g., set finishing options, insert tray call commands, etc.)?
17. Do you need to ensure that your documents are being sent to the most suitable printer?

### Dispatcher Phoenix Products

#### **DISPATCHER PHOENIX FOUNDATIONS**

An easy-to-use, scalable, and cost-effective solution that provides a wide range of document imaging, processing, routing, and printing features. Optional modules can be included at any time to add even greater power and functionality to your workflows.

#### **DISPATCHER PHOENIX PROFESSIONAL**

Dispatcher Phoenix Professional includes all of the standard functionality found in *Dispatcher Phoenix Foundations* along with advanced features such as file parsing and routing based on page count, color, metadata processing, and much more. Ideal for when you need to directly interact with or manipulate files.

#### **DISPATCHER PHOENIX LEGAL**

Designed specifically for legal professionals, Dispatcher Phoenix Legal includes all of the standard functionality found in Dispatcher Phoenix Foundations along with features such as advanced Bates stamping, PDF file conversion, intelligent redaction and highlighting, and much more.

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## Quick Reference



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