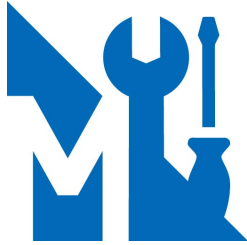


MetaServer

Process scanned and electronic PDF documents imported from folders or email inboxes.



More than ever, documents arrive as electronic PDFs attached to an email or are scanned with MFP devices (multi-functional printers / digital copiers).

MFPs are not directly connected to an end-user PC like a traditional scanner, but are network devices scanning documents as PDF files to folders or email.

MetaServer is developed with this new trend in mind. It can watch folders and email inboxes and process scanned PDF files and electronic PDF email attachments. It dynamically names and organizes them using text extraction and easy to configure rules.

It automatically switches between electronic text extraction, in case of electronic PDFs attached to emails, and OCR extraction, in case of a scanned image.

Typically, organizations use their MFPs to generate PDF files with a random name generated by the machine. Next, the user finds the PDF file, renames it and puts it in the correct folder structure. This process is OK for the occasional scan but if you have to process multiple documents, it is cumbersome and prone to error.

This is where MetaServer comes in. You just scan the documents and that's it. Relevant data is automatically extracted and used to organize the PDFs in folders and apply a meaningful name to each PDF.

[Download MetaServer](#)

[Download Searchable PDF Module](#)

[Online Help](#)

[MetaServer Tutorial](#)

[Download French Demo Pack](#)

[PDF Brochure](#)

MetaServer Server runs as a background service to perform a number of automatic processes such as:

- Import PDF files from folders and sub folders
- Watch email inboxes and import PDF attachments
- Separate, process and organize documents based on rules
- Delete blank pages, auto-rotate pages based in their text and/or barcode orientation
- Convert scanned PDFs to searchable PDFs
- Auto-Detect PDF Type: Extract data accessing the text of an electronic PDF without passing through OCR or automatically use OCR if the PDF is image-only
- Complete data by means of database lookup
- Check validity of data using validation rules
- Convert color scanned PDFs to black & white and scale color scanned PDFs to a lower resolution to reduce file size
- Export the result to one or more destinations of choice



The **MetaServer Administration Client** gives access to all functionality. This includes access to the configuration of the Workflows, server status, error management, client settings, etc.

Workflows	Server	Activity	Last activity report	Last time applied	Health
1	Import Email (CB - FLOATING DATA, Redemptio...	Waiting for email	4s ago		
2	Import from Folder (CB - FLOATING DATA, FLOATI...	Waiting for document	4s ago	12:37:15 (Document 12:37:15.579)	
3	Apply Separation	Waiting for document	4s ago		
4	Archive Email	Waiting for document	4s ago	12:37:30 (Document 12:37:15.579)	
5	Check Validity	Waiting for document	4s ago	12:37:25 (Document 12:37:15.579)	
6	Classify	Waiting for document	4s ago		
7	Convert Email Body/URL to PDF	Waiting for document	4s ago		
8	Convert to Format	Waiting for document	4s ago		
9	Convert to Searchable PDF	Waiting for document	4s ago		
10	Convert to Searchable PDF	Waiting for document	4s ago		
11	Convert to Searchable PDF	Waiting for document	4s ago		
12	Convert to Searchable PDF	Waiting for document	3s ago		
13	Delayed Apply	Waiting for document	2s ago	12:37:57 (Document 12:37:15.550)	
14	Distribute	Waiting for document	3s ago		
15	Delete Page(s)	Waiting for document	3s ago		
16	Download URL	Waiting for document	3s ago		
17	Email Alert	Waiting for document	3s ago		
18	Export to Database	Waiting for document	3s ago		
19	Export to Email	Waiting for document	3s ago		
20	Export to Folder	Waiting for document	2s ago	12:38:02 (Document 12:37:15.550)	
21	Export to Workflow	Waiting for document	3s ago		
22	Extract	Waiting for document	3s ago	12:38:01 (Document 12:37:15.550)	
23	Forward Email	Waiting for document	2s ago		
24	Scale Page(s)	Waiting for document	2s ago		
25	Select	Waiting for document	2s ago		
26	Separate Document / Process Page	Waiting for document	2s ago		
27	Unlock Unresponsive Sessions	Next verification at 12:51:07	1m 57s ago		

Server: rpley-sophie | Started on: Wednesday, 6 February 2019 at 11:13 | Documents: 0 | In organizer: 0 (0) | Skipped: 0 (0) | In validation: 0 (0) | Skipped: 0 (0) | Errors: 0

The MetaServer Administration Client gives access to the MetaServer server status, settings and client settings

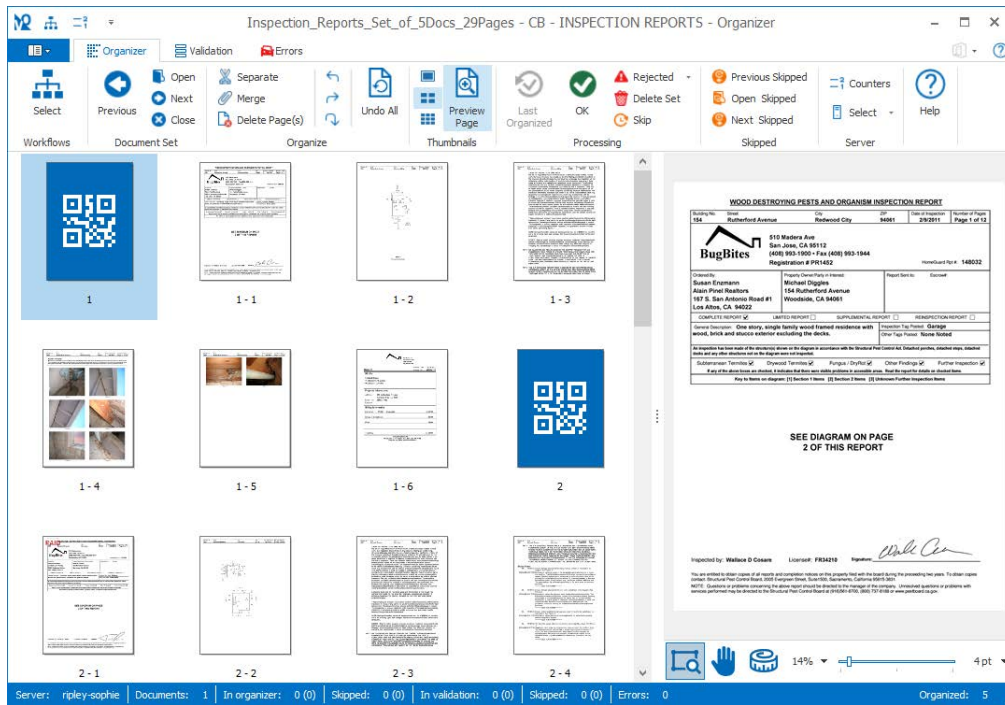


The **MetaServer Operator Client** hides all administrative functions to avoid accidental changes to the configuration. It can be used for validation, organizing and error management. Through the Administration Client, you can configure the operator client(s) and hide certain functions to simplify the user interface even further.

The **Organizer** is used to visually organize documents. You can access the Organizer through the Administration Client and the Operator Client.

For example, if you scan a large number of invoices with the ADF (Automatic Document Feeder) of a multifunctional printer, they arrive as a single PDF containing multiple invoices. Based on rules, you can automatically separate documents, delete or rotate pages, etc.

With the Organizer, you can visually separate the PDF using virtual separator sheets. The Organizer can also be used to delete or rotate pages and change the sequence of the documents.



The Organizer (MetaServer Operator Client)

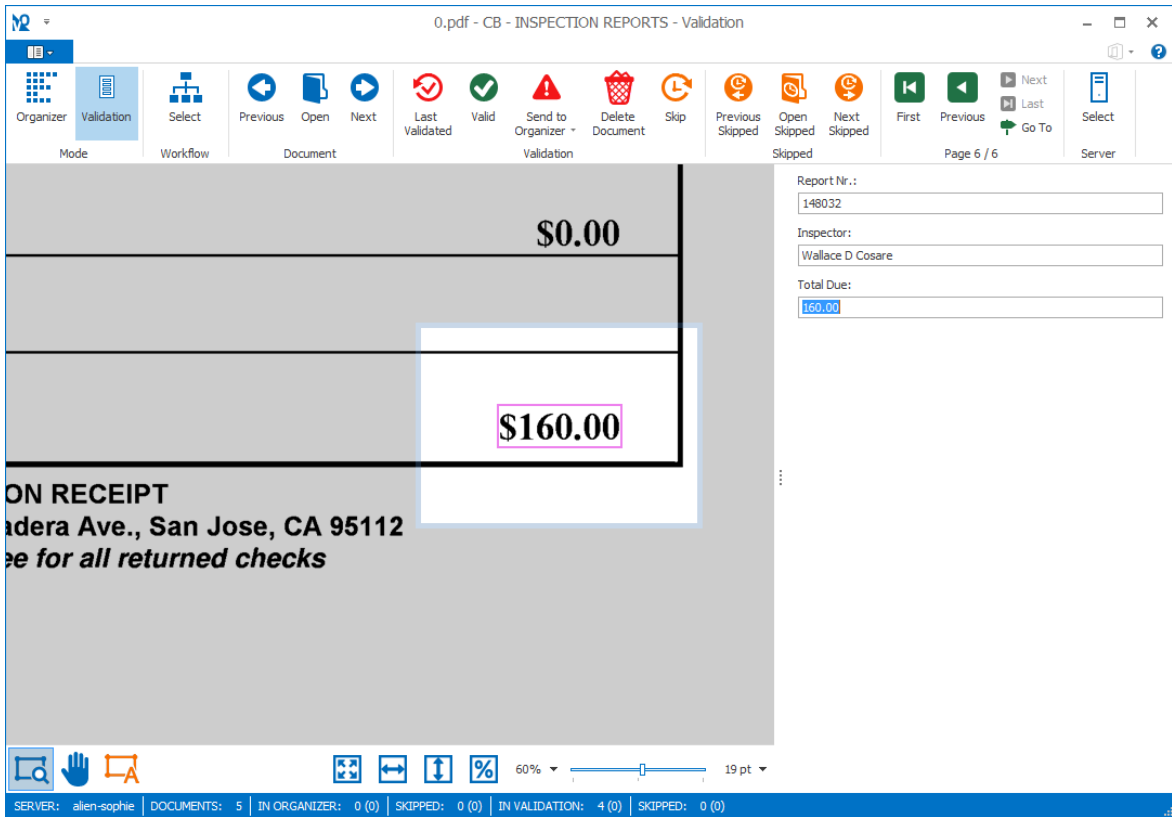
MetaServer Validation: if the server is not able to extract data automatically, you can use the validation client to complete the data using a number of techniques such as:

- Select Text tool
- Select Barcode tool
- Database Lookup
- Manual Data entry

To speed up the validation process, the extracted data is highlighted on the document. If the data is located on another page, the correct page is automatically displayed.

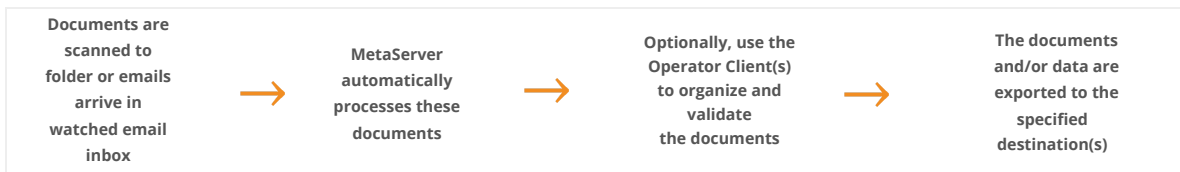
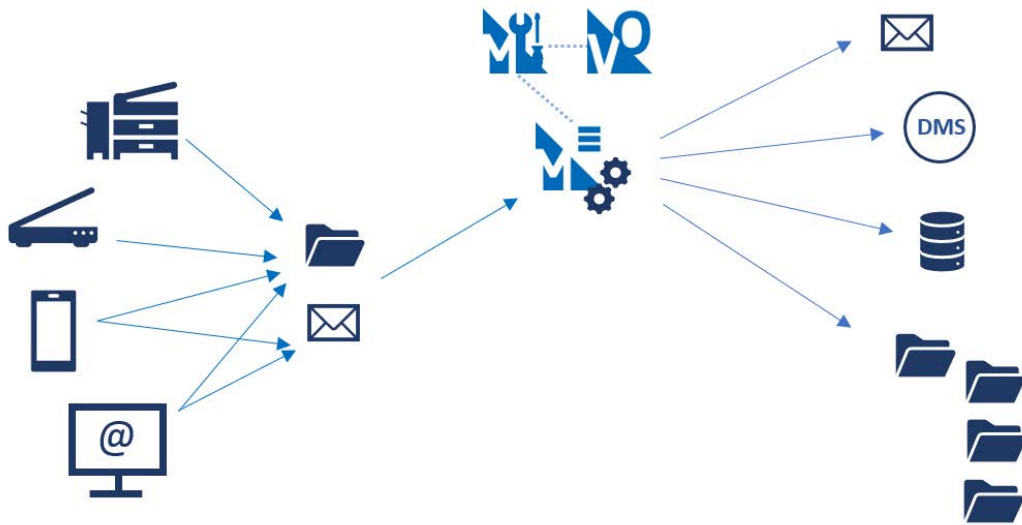
For example, the total amount on the document below was found on the last page in the bottom corner. By simply navigating in the Total Due field, the viewer jumps to the last page and highlights the zone where the data was found.

Validation can be configured to only display documents with invalid data. Documents with correct data will go straight through without any user interaction. You can access Validation through the Administration Client and the Operator Client.



Validation (MetaServer Operator Client)

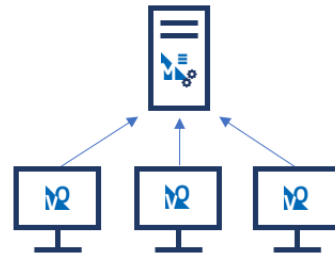
MetaServer processes PDF files generated by any device that can scan to folder or to email. Or you can ask your customers / vendors to email PDF documents to a dedicated email address watched by MetaServer.





In its most basic configuration, you can run MetaServer, the Administration client and/or Operator Client on a single workstation.

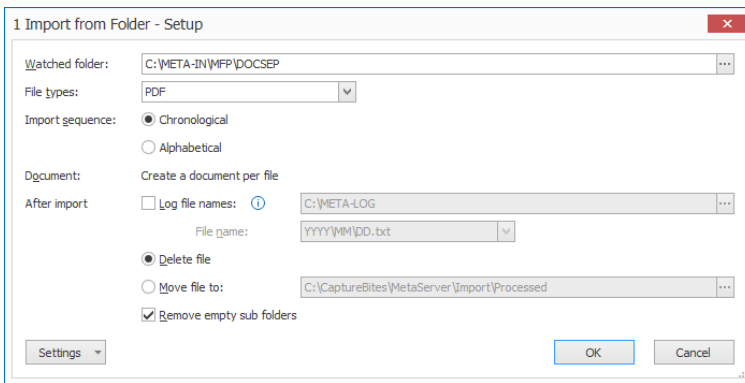
But you can also run MetaServer as an unattended service on a separate machine to do all the automatic processing and have other users validate and/or organize the documents using the Operator Client on their PC.



No Coding, Only Configuration

Instead of using custom scripting unique for each implementation, you configure MetaServer with the Administration Client using a range of actions, such as "Import", "Extract", "Validate", etc. with easy to configure setup panels.

For example, this is what the Import from Folder setup looks like:



MetaServer Functionality

MetaServer Workflows

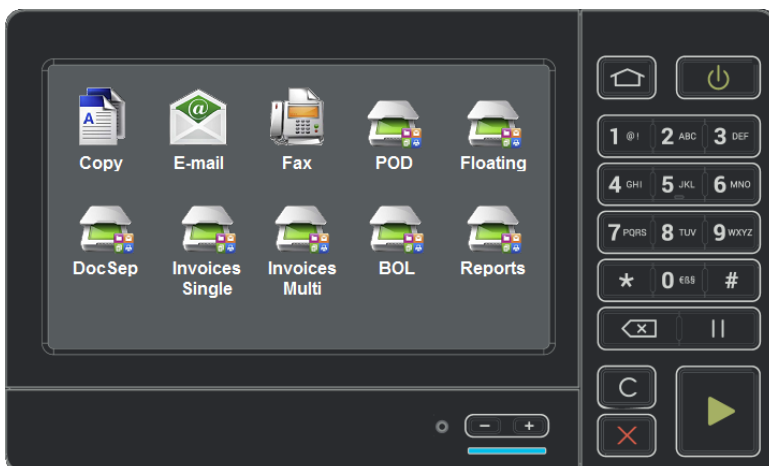
MetaServer configurations are defined in the Administration Client under the "Workflows" tab.

In a workflow you define how to process a certain document type. It's a combination of actions and rules to process the documents and starts with one or more import actions followed by a combination of document separation, image processing, extraction and validation actions to finally exit through one or more export actions.

Typically, you have a workflow per document type. For example, a vendor invoice workflow, a POD workflow, a delivery ticket workflow and so on.

In combination with a multi-functional printer, you would define hot buttons for each workflow to scan to the correct folder watched by each workflow.

Scan buttons on your MFP panel could, for example, look like this:

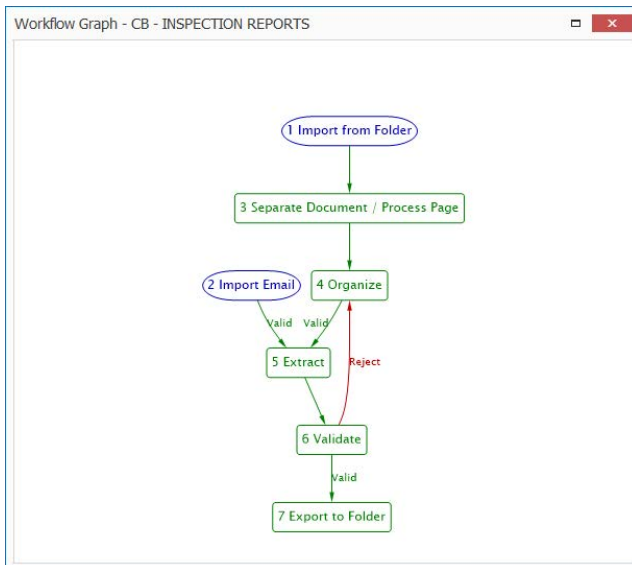


The user would just press the button corresponding to his document type and MetaServer does the rest.

This is what a workflow looks like in the MetaServer Administration Client:

Action	Settings	Condition	Next action	Description
1 Import from Folder	C:\META-IN\WFP\DOCSEP		3 Separate Document / P...	
2 Import Email	Inspection Reports Inbox, change.this.asap@capturebites.net	...	5 Extract	
		Valid		
		Reject		
3 Separate Document / Process Page	2 rules		4 Organize	
4 Organize		...		
		Valid	5 Extract	
		Reject		
		Spam		
		Delete		
5 Extract	8 rules		6 Validate	
6 Validate	3 fields	...		
		Valid	7 Export to Folder	
		Reject	4 Organize	
		Spam		
		Delete		
7 Export to Folder	Attachment_PDF, Processed_PDF to C:\META-OUT\WFP\INSP...	...		
		Success		
		File Locked		

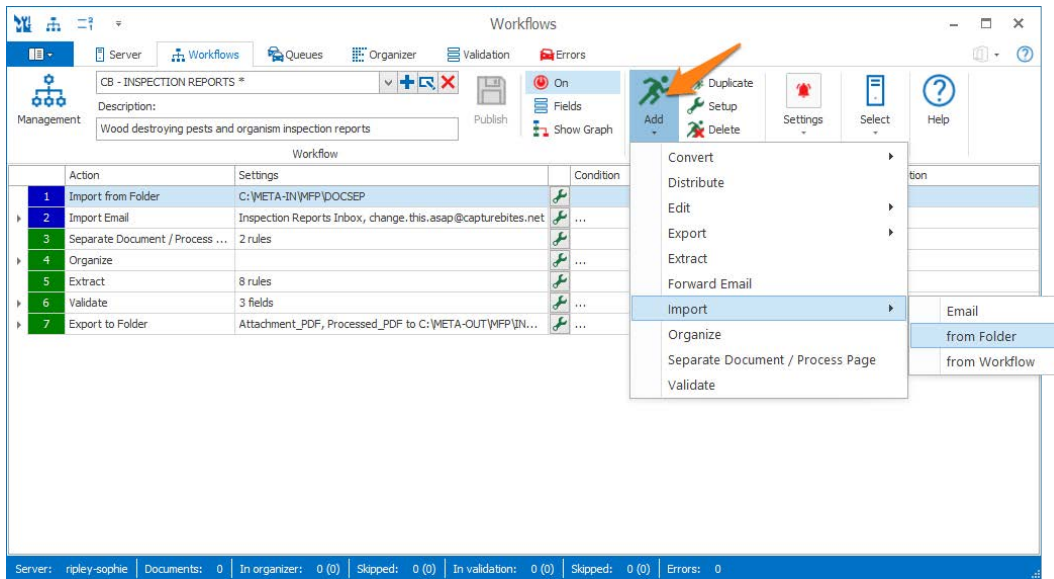
You can also visualize your workflow by pressing the Graph button:



Before defining a workflow, you need a set of sample documents. You will use these to test your Extraction rules. You will be able to select the folder holding your sample documents and test your rules on any of the documents in your sample set.



A workflow consists of different actions. To construct a workflow, you simply add actions using the Add button.



This is a short summary of the available actions:

- **Import Email:** import email from a specified inbox (using IMAP).
- **Import from Folder:** import PDF files from a specified folder and its sub folders.
- **Import from Workflow:** import PDF files and metadata from another workflow. This action is the entry point for another workflow's Export to Workflow action.
- **Separate Document / Process Page:** automatically separate documents and delete or rotate pages based on rules.
- **Organize:** send the file to the organizer to visually separate the document, edit the order of pages, delete pages, etc.
- **Extract:** define a sequence of rules to extract and format data.
- **Validate:** based on the validation rules, send invalid documents to the validation viewer to complete or check the data.
- **Distribute:** based on the value of a specific field, you can send a document to a different action in the workflow.
- **Delete Page(s):** delete certain pages of the document (e.g. delete separator sheets)
- **Scale Page(s):** automatically scale a document to a certain resolution and set the JPEG compression level.
- **Convert to Format:** convert specific pages of your document to black & white or convert your document to a multipage TIFF.
- **Convert to Searchable PDF:** convert image-based (scanned) PDF files to searchable PDF files, partially or completely.
- **Export to Email:** send the result to a specified email address.
- **Export to Folder:** send the result to a folder or FTP Server.
- **Export to Database:** send the result to a file server, FTP server and database.
- **Export to Workflow:** send the result to another workflow for further processing. The receiving workflow will need an Import from Workflow action to function as an entry point.
- **Forward Email:** forward the original imported email including its original body text and attachments to a specified email address.

Recommended System Requirements

MetaServer specifications:

- **Processor:** Intel i5 (minimum) - Intel i7-i9 or equivalent (recommended)
- **Number of cores:** More cores means faster performance.
- **Memory:** 4 GB (Minimum) - 8 GB RAM (Recommended)
- **OS:** Windows 7 or Windows Server 2008 R2 or more recent
- **Storage:** 500 GB (minimum) - 1 TB (Recommended) HDD or SSD

MetaServer Administration Client / Operator Client specifications:

Note: These are the specifications for machines only running the MetaServer Administration or Operator Client software. If the Client(s) run on the server, the specifications for MetaServer apply (see previous).

- **Processor:** Intel i3 (minimum) - Intel i5, equivalent or above
- **Memory:** 4 GB RAM or above
- **OS:** Windows 7 or more recent
- **Storage:** 500 GB HDD or SSD

How Does MetaServer Compare to Kofax Express with MetaTool?

[Kofax Express](#) with [MetaTool](#) is recommended when you want to use a production scanner directly connected to your PC through USB. Production scanners are ideal for high-speed, high-volume document scanning.

MetaServer is recommended in combination with MFPs, networked devices, network scanners or scan-to-folder oriented systems such as [Fujitsu ScanSnap](#). It is also recommended to process electronic PDFs or documents that arrive as attachments to email.