Dispatcher Phoenix ScanTrip Upgrade Process

February 2021

Dispatcher Phoenix ScanTrip

ScanTrip is a stackable, standalone license that provides the powerful functionality organizations need for core scanning workflows.
With ScanTrip, the following workflows are available:

- Scan to Home

- Scan to Me

- Scan to the Cloud

ScanTrip Configuration	Processing Nodes	Input & Output Capabilities
Client Application	Rename	MFP Panel
Workflow Builder Tool	Advanced OCR	Web Capture
LiveFlo Technology	Metadata to File	Cloud Connectors
Dispatcher Phoenix Web		Output Folder
Workflow Scheduler		SMTP Out
Sample Workflows		MS Exchange Connector
Integrated MFP Simulator		

Dispatcher Phoenix ScanTrip includes a variety of connectors to popular document management systems and cloud storage applications including:

- Box
- Dropbox
- FilesAnywhere
- FileAssist
- Google Drive
- OneDrive
- OneDrive for Business
- SharePoint
- SharePoint Online
- WebDAV

Upgrading to Full Dispatcher Phoenix

A customer needing access to more advanced workflow automation functionality can upgrade their Dispatcher Phoenix ScanTrip licenses to a full Dispatcher Phoenix license to gain access to additional features (highlighted in blue):

Collection Nodes
- DP Mobile
- Dropbox In
- FTP In
- Input Folder
- LPR In
- MFP User Box
- Web Capture
- MFP Panel

Processing Nodes
- Annotate
- Color Route
- Convert to PDF
- Convert to PS
- Deskew
- Despeckle
- Insert
- Merge
- Metadata Routing
- Metadata Scripting
- Mirror Image
- Negative Image
- ODBC
- Page Count Route
- Parse & Distribute
- Parse & Insert
- Parse & Replace
- Parser
- PDF Metadata Extraction
- PJL Print Preferences
- Print to File
- Split
- Watermark
- Advanced OCR
- Metadata to File
- Rename

Distribution Nodes
- Printer
- SFTP Out
- FTP Out
- Box Connector
- Dropbox Connector
- FilesAnywhere Connector
- FileAssist Connector
- Google Drive Connector
- Microsoft Exchange Connector
- OneDrive Connector
- OneDrive for Business Connector
- Output Folder
- SharePoint Connector
- SharePoint Online Connector
- SMTP Out
- WebDAV Connector

+ optional modules and vertical market packages like the Legal package, Office Package, Barcode Processing module, Release2Me module , Workstation, Bubble Grader, etc.

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Upgrade Licensing

- Item numbers are available to allow for easy upgrading to Dispatcher Phoenix.

- Upgrade licenses are available in 2 volume ranges (similar to ScanTrip volume ranges) :
  - 1-49 Devices
  - 50+ Devices

- 1-year maintenance options are available for:
  - Standard Maintenance
  - Gold SLA

- When purchasing ScanTrip Upgrade Maintenance, the expiration date of the maintenance for the license is extended by 1 year.

Upgrade Licenses

Item #	ScanTrip Upgrade Licenses
7640021911	Dispatcher Phoenix ScanTrip (1-49) Upgrade
7640021914	Dispatcher Phoenix ScanTrip (50+) Upgrade

Maintenance Upgrade Licenses

Item #	ScanTrip Upgrade Maintenance
7640021912	Dispatcher Phoenix ScanTrip (1-49) Upgrade 1 Year Maintenance
7640021913	Dispatcher Phoenix ScanTrip (1-49) Upgrade 1 Year Gold SLA
7640021915	Dispatcher Phoenix ScanTrip (50+) Upgrade 1 Year Maintenance
7640021916	Dispatcher Phoenix ScanTrip (50+) Upgrade 1 Year Gold SLA

Benefits of Upgrade Licensing

1. **Easy-to-use item numbers** streamline the upgrade process.

2. **No professional services** required.

3. **Reduce dependency on custom quotes** to facilitate upgrades.

4. Provides a gateway to **further, flexible workflow automation power**, such as:

   - Advanced capture
   - Barcode processing
   - File routing
   - Image conversion

   - Bates stamping
   - Intelligent redaction
   - Secure print release
   - And much more!

Upgrade Requirements

Active Inputs

All active inputs in the current ScanTrip installation must be upgraded with matching volume licenses.

Original ScanTrip License	ScanTrip Upgrade Licenses
Dispatcher Phoenix ScanTrip (1-49) →	Dispatcher Phoenix ScanTrip (1-49) Upgrade
Dispatcher Phoenix ScanTrip (50+) →	Dispatcher Phoenix ScanTrip (50+) Upgrade

Maintenance

Maintenance must be included for every active input in the upgrade order.

Additional Add-Ons

If the customer needs to add any additional active inputs or Dispatcher Phoenix optional modules, they should be ordered using standard Dispatcher Phoenix licenses.

Upgrade Process

To upgrade a customer's ScanTrip installation, follow these steps:

1. **Verify the status of the customer's Dispatcher Phoenix ScanTrip Maintenance.**

    *   Software maintenance must be active in order to upgrade.

    *   If the software maintenance is expired on one or more registered items of the current ScanTrip installation, maintenance must be reactivated before upgrading.

2. **Determine if a co-term will be required.**

    *   A co-term is required for current installations with mismatched maintenance expiration dates.

    *   Contact sec@kmbs.konicaminolta.us to begin the coterminous process.

3. **Provide a quote to the customer for the upgrade using upgrade item numbers.**

4. **Submit the order.**

    *   Once the order has been received, purchase code(s) codes will be issued that can be applied to the ScanTrip installation.
    *   If an order includes additional Dispatcher Phoenix Active Inputs or optional packages/modules, separate purchase codes will be provided (e.g., one for the upgrade; one for the additional active inputs and any optional modules).

Example 1: Standard Upgrade

In this case, the customer has 25 ScanTrip licenses with standard maintenance expiring on January 1, 2022.

Existing Licenses

Item #	License	Quantity	Maintenance Expiration
7640021210	Dispatcher Phoenix ScanTrip (1-49)	25	January 1, 2022

Upgrade Order

To upgrade to a full Dispatcher Phoenix license, this customer would need to order the following:

Item #	License	Quantity
7640021911	Dispatcher Phoenix ScanTrip (1-49) Upgrade	25
7640021912	Dispatcher Phoenix ScanTrip (1-49) Upgrade 1 Year Maintenance	25

The new maintenance expiration date will be January 1, 2023.

Example 2: Upgrade w/ Additional Modules

The customer has 25 ScanTrip licenses with maintenance expiring on **January 1, 2022**. They also need to access Dispatcher Phoenix on 5 additional devices as well as use the Forms Processing capabilities of Dispatcher Phoenix.

Existing Licenses

Item #	License	Quantity	Maintenance Expiration
7640021210	Dispatcher Phoenix ScanTrip (1-49)	25	January 1, 2022

Upgrade Order

To upgrade, this customer would need to order the following:

Item #	License	Quantity
7640021911	Dispatcher Phoenix ScanTrip (1-49) Upgrade	25
7640021912	Dispatcher Phoenix ScanTrip (1-49) Upgrade 1 Year Maintenance	25
7640021227	Dispatcher Phoenix (10-49 Active Inputs)	5
7640021237	Dispatcher Phoenix (10-49 Active Inputs) 1 Year Maintenance	5
7640018967	Dispatcher Phoenix Forms Processing (for image data extraction)	1
7640018996	Dispatcher Phoenix Forms Processing Software Maintenance (1 yr.)	1

- Maintenance expiration for the upgraded license will now be January 1, 2023.
- Maintenance expiration for the additional active inputs and Forms Processing will be in ~ 1 year (on the last day of the following month of the purchase date).

Example 3: Co-Term

The customer has 55 ScanTrip licenses with standard maintenance. Since the expiration dates for the maintenance on their licenses are different, their maintenance expiration dates will need to be made coterminous prior to the upgrade.

Existing Licenses

Item #	License	Quantity	Maintenance Expiration
7640021210	Dispatcher Phoenix ScanTrip (1-49)	25	January 1, 2022
7640021210	Dispatcher Phoenix ScanTrip (1-49)	25	March 1, 2022
7640021210	Dispatcher Phoenix ScanTrip (1-49)	5	June 1, 2022

To complete the upgrade for this customer, contact sec@kmbs.konicaminolta.us!

Professional Services fees may apply.

1. Will existing workflows be impacted by the upgrade?

Customers will retain their existing workflows after upgrading. Any workflows that were running prior to the upgrade will continue to run as normal. As with any monthly update, any workflows running as a service should be stopped prior to the upgrade. Workflow running as a service can be restarted after the upgrade has been completed.

2. My customer placed multiple orders for ScanTrip licenses. How can they upgrade?

If the customer placed multiple orders for ScanTrip licenses over time, their licenses will likely have different maintenance expiration dates. In these cases, a co-term service is required. The SEC Professional Services team will create a quote to align the maintenance for all of the customer's licenses. Please contact sec@kmbs.konicaminolta.us to start the co-term process.

3. My customer's maintenance for ScanTrip has expired. Can they still upgrade?

Active maintenance is required in order to upgrade. The customer will need to purchase a ScanTrip Maintenance Reactivation Key, and at least 1 year of ScanTrip maintenance for each active input prior to upgrading.

4. Will my customer's user experience change after upgrading?

The user experience for any existing workflows will not change after upgrade. The first time the customer launches the Dispatcher Phoenix client application after upgrading, they will have access to Dispatcher Phoenix's advanced workflow automation functions as well as the full library of sample workflows that can be used with their new license!

5. Why did the customer receive 2 purchase codes?

A customer will receive 2 purchase codes when their order contains more than the ScanTrip upgrade licenses. For example, if a customer needs to add active inputs, or a vertical market package to their Dispatcher Phoenix installation, they will receive a purchase code for the upgrade licenses and a second purchase code for the additional active inputs and optional modules.

6. Are there limits on what a customer can order as part of the upgrade process?

No! As long as the customer upgrades all of their existing ScanTrip licenses and maintenance, the customer can add any additional Dispatcher Phoenix 7.0 functionality to their installation when upgrading.