



Onboarding Guide

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WELCOME TO THE DISPATCHER SCANTRIP CLOUD ONBOARDING GUIDE!

Thank you for your recent purchase of Dispatcher ScanTrip Cloud! We are excited for you to begin taking control of your cloud-based scan workflow automation. This guide describes the steps necessary to successfully complete the initial setup for a new Dispatcher ScanTrip Cloud tenant.

OVERVIEW

Dispatcher Scan Trip Cloud is a cloud-based application that combines powerful scan processing automation with the availability and accessibility of cloud architecture. Using Dispatcher ScanTrip Cloud, you can manage your workflows, users, devices, and more from a single location that is accessible from anywhere. To get started, visit scantripcloud.com.

Dispatcher ScanTrip Cloud is [supported on most Konica Minolta MFPs](#), and is easily installed. You can start automating your workflows in minutes. Here's how:

Steps in the Process

1. [Redeem Your Dispatcher ScanTrip Cloud Purchase Code Through MarketPlace](#)
2. [Start Tenant Configuration](#)
3. [Select Your Role](#)
4. [Add Devices and Assign Device Licenses](#)
5. [Share Workflows](#)
6. [Start Workflows](#)

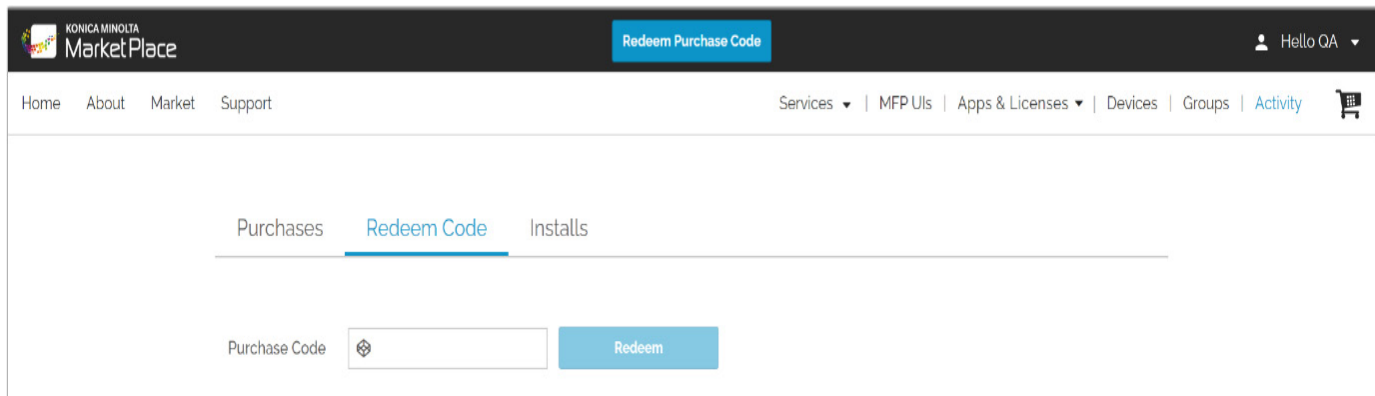
ONBOARDING TO DISPATCHER SCANTRIP CLOUD

The following steps outline the onboarding process for new ScanTrip Cloud tenants. For detailed information, consult the following documentation:

- [Dispatcher ScanTrip Cloud Online Help](#)
- [MarketPlace Online Help](#)

Step 1. Redeem Your ScanTrip Cloud Purchase Code Through MarketPlace

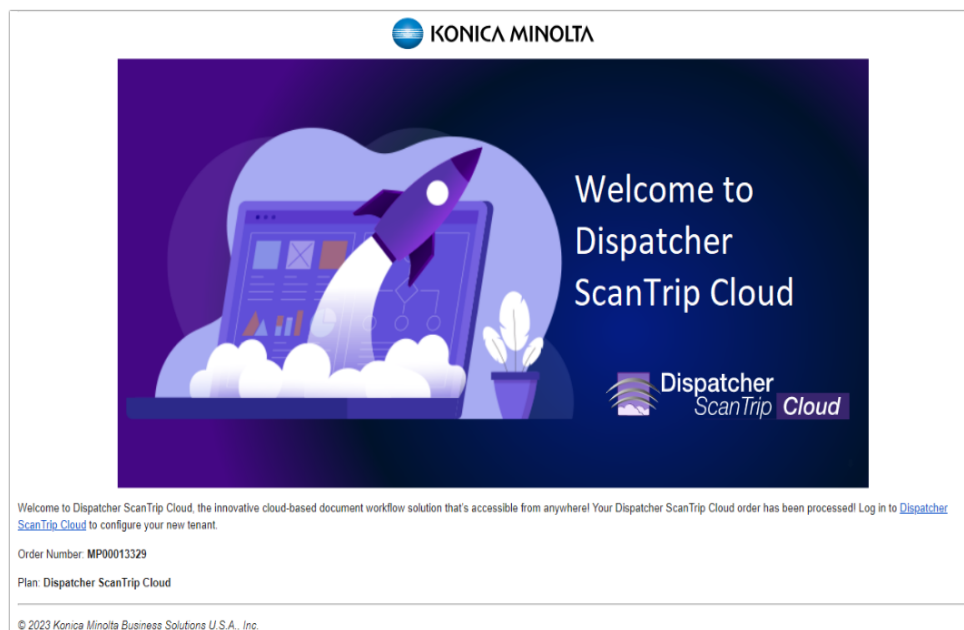
A MarketPlace account is required to redeem a purchase code, providing an additional layer of security in the onboarding process. Use the Redeem Code tab on the Activity page in MarketPlace:



Important! The redeemer of the purchase code must perform the initial steps of [tenant configuration](#) (Steps 2-6).

Step 2. Start Tenant Configuration

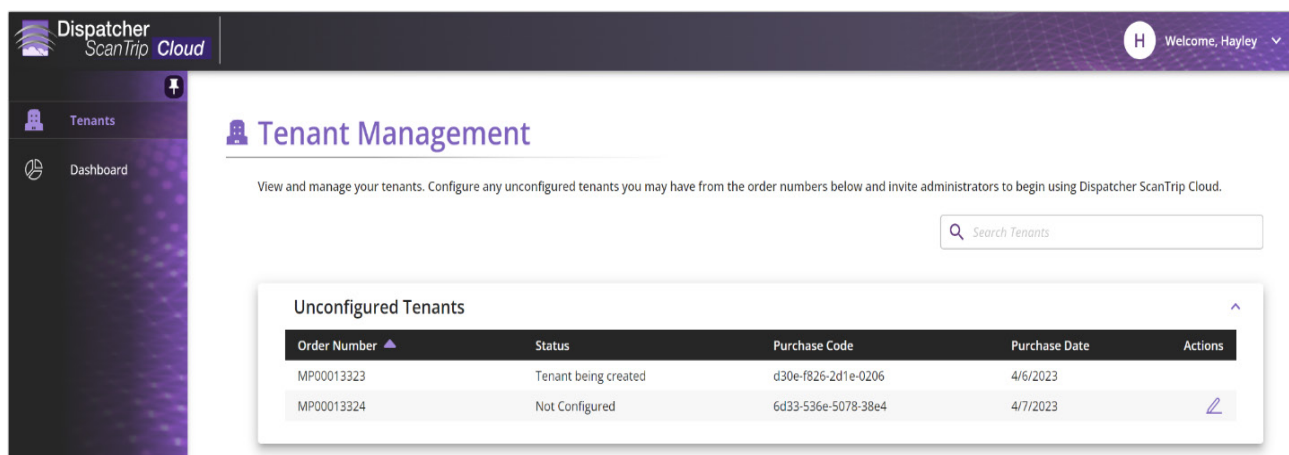
MarketPlace sends an automated email from Scantripcloud.com to the redeemer of the purchase code. For the purposes of this documentation, we will assume this is you. The email contains information and links to activate the Dispatcher ScanTrip Cloud tenant. If you do not receive an email, check your spam folder. A sample email appears below:



When you receive the email and are ready to activate your tenant, select the link in the email or log into the Dispatcher ScanTrip Cloud website. The Select Your Role page appears. Proceed to [Step 3](#).

Note: If you are currently Tenant Manager for one or more tenants, then you are first directed to the Tenant Management page where you must select the pencil icon next to the Purchase Code you would like to configure.

The Tenant Management page appears below. Select the Configure icon in the Actions column to configure that tenant. The Select Your Role page appears and you can proceed to Step 3.



Tenant Management

View and manage your tenants. Configure any unconfigured tenants you may have from the order numbers below and invite administrators to begin using Dispatcher ScanTrip Cloud.

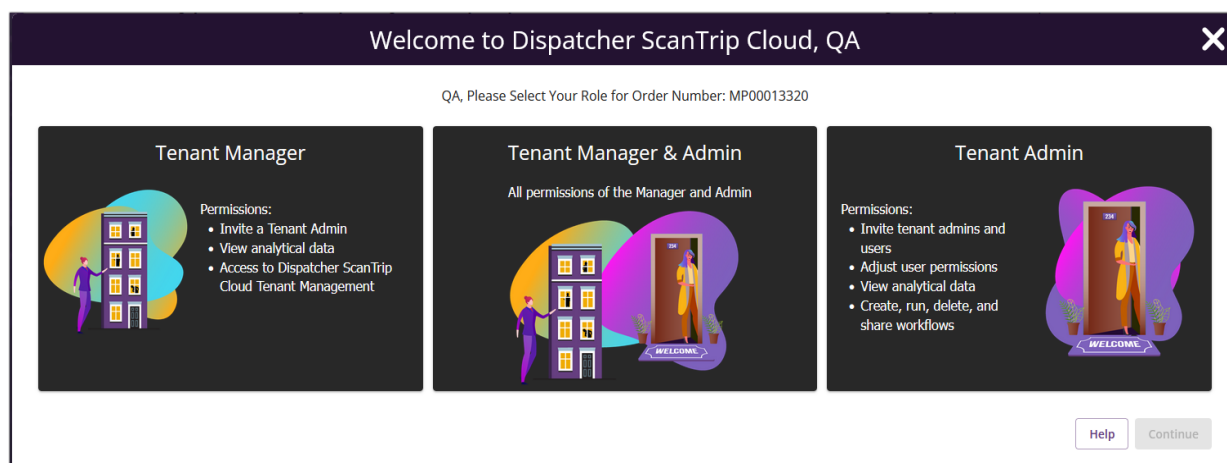
Search Tenants

Order Number	Status	Purchase Code	Purchase Date	Actions
MP00013323	Tenant being created	d30e-f826-2d1e-0206	4/6/2023	
MP00013324	Not Configured	6d33-536e-5078-38e4	4/7/2023	Configure

Step 3. Select Your Role

All tenant members must have a role. Roles determine members' access within the tenant. As the redeemer of the purchase code, you are first required to select a role for yourself via the Select a Role window. The following roles are available:

- **Tenant Manager** - Designed for those who manage multiple tenancies, for example, dealer representatives and departmental managers. Tenant managers have access only to the Manager area of the portal and not the Admin area. If your tenant is not part of a configured tenant group, then your tenant does not need a tenant manager.
- **Tenant Admin** - Tenant admins have access to the Admin area of the portal, where they oversee the day-to-day operations of the tenant.
 - **Tenant Super Admin** - This role has all available tenant permissions. A tenant requires at least one super admin. By default, the first Tenant Admin is a Tenant Super Admin.
 - **Tenant Admin** - This role has all available permissions except access to the Settings page. This role is accessible after configuration is complete.
- **Tenant Manager & Admin** - This role has the combined permissions of the Tenant Manager and Tenant Super Admin roles. It enables an individual to access both the Manager and Admin areas of a tenant.



Welcome to Dispatcher ScanTrip Cloud, QA

QA, Please Select Your Role for Order Number: MP00013320

Tenant Manager

Permissions:

- Invite a Tenant Admin
- View analytical data
- Access to Dispatcher ScanTrip Cloud Tenant Management

Tenant Manager & Admin

All permissions of the Manager and Admin

Tenant Admin

Permissions:

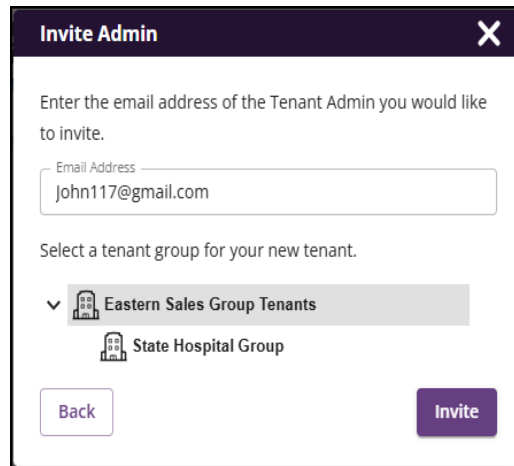
- Invite tenant admins and users
- Adjust user permissions
- View analytical data
- Create, run, delete, and share workflows

Help Continue

For a more detailed description of roles, see the [Onboarding](#) section of the Dispatcher ScanTrip Cloud Online Help.

Tenant Managers

If you select the Tenant Manager role, the Invite a Tenant Admin window appears and you are prompted to send an email invitation requesting the recipient to join the tenant as Super Admin. Once the tenant includes a super admin, that member completes the initial configuration of the tenant and you, as Tenant Manager, have completed your tasks for initial configuration.



Tenant Admins

If you select the Tenant Admin role, the Tenant Configuration window appears:

Online Help.' Below this is the instruction 'Enter a friendly name for your tenant.' followed by a text input field labeled 'Tenant Name' containing 'Pendulum Publishing'. Below the input field is the instruction 'Enter a unique domain name.' followed by a text input field labeled 'Domain Name' containing 'pendulum-pub' and '.tenant.stratus.lol'. Below the input field is the instruction 'Select the region in which the tenant's data should be stored. This selection cannot be changed later.' followed by a dropdown menu labeled 'Region' with 'US East (N. Virginia)' selected. Below the dropdown menu is the instruction 'Select the authentication method for the tenant to login. This selection cannot be changed later.' followed by a dropdown menu labeled 'Authentication Method' with 'Konica Minolta MarketPlace' selected. At the bottom of the window is a checkbox that is checked, with the text 'Click here to confirm that the tenant's data will be stored in US East (N. Virginia) and the Authentication Method will be Konica Minolta MarketPlace. Note that these selections cannot be changed later.' Below the checkbox are two buttons: 'Back' and 'Continue'." data-bbox="286 530 701 917"/>

To complete the initial configuration of the tenant and activate it for use, enter the following information:

- 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 to log in to your tenant. Depending on the selection, there may be additional fields that appear that require configuration. 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. When selecting the Entra ID authentication method, you will need to provide the Metadata URL, which is provided by the Entra ID app.

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

Tenant Managers & Admins

If you select the Tenant Manager & Admin role, complete initial tenant configuration as described in the Tenant Admin section.

Finalizing Setup

For Tenant Managers, setup will be completed by a Tenant Admin.

If you selected either the Tenant Admins or Tenant Managers and Admins role or you are a Tenant Admin completing the tenant confirmation after receiving a welcome email, Dispatcher ScanTrip Cloud will begin creating your tenant after you have selected the “Continue” button. This process can take up to 24 hours. Then, you will be allowed to log in to the tenant and proceed to Step 4.

Step 4. Add Devices and Assign Device Licenses

Add to your tenant the devices on which you want to run Dispatcher ScanTrip Cloud workflows. Note the following about devices in Dispatcher ScanTrip :

- To add a device to your tenant:
 - The device must be a MarketPlace device (that is, connected to MarketPlace by having the MarketPlace Client installed).
 - You must have admin privileges for the device, or be able to provide the device serial number and password.
 - The device must support Dispatcher ScanTrip Cloud .
- To run workflows on a device:
 - It must be licensed for Dispatcher ScanTrip Cloud (Dispatcher ScanTrip Cloud is licensed by device).
 - The Dispatcher ScanTrip Cloud app must be [installed](#) on the device.
 - The workflow must be running in the Workflow Manager.

Activating New Devices

New devices must be connected to your MarketPlace account before they can be added to your tenant. Do the following:

1. At the MFP, navigate to the MarketPlace app, and tap the **APP MANAGER** button in the lower-left corner of the MFP screen.



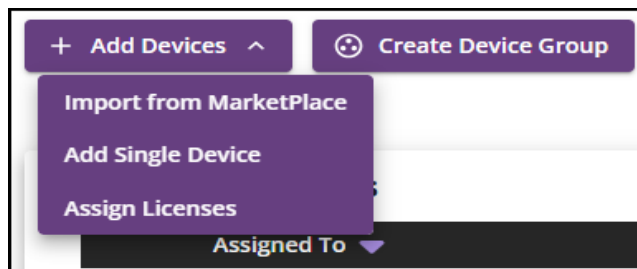
2. Enter the MarketPlace Username and Password associated with the account.
3. Tap the **Login** button.

The MFP is now connected to MarketPlace.

Adding Devices to a Tenant

The Device Management page in Dispatcher ScanTrip Cloud provides the following options for adding devices to your tenant:

- **Import from MarketPlace** - Select this option to display the Import Devices from MarketPlace window. The Available Devices panel lists all devices that appear on your MarketPlace Devices page (that is, devices for which you have admin access). For information on adding devices to your MarketPlace account, see the [Managing Devices](#) section of the MarketPlace Online Help.



- **Add Single Device** - Use this option for MarketPlace devices for which you do not have admin access, but for which you can provide the device serial number and password.

Note: You may need to enter the Device Admin Password for this device.







- **Assign Licenses** - Use this option to connect Dispatcher ScanTrip Cloud to a non-MFP input, such as Dispatcher Phoenix. For more information about adding non-MFP devices to your tenant, see the [Device Management](#) section of the Dispatcher ScanTrip Cloud Online Help.

Assign Device Licenses

After adding a device into your tenant, and before you can run workflows on it, you must assign a device license to it. Do the following:

- In Dispatcher ScanTrip Cloud, access the Device Management page.
- In the Actions column, select the Register License icon for the device you want to register. If you have a license available in your tenant, the icon will turn green, indicating the device is now license

☰ **All Devices (Not Grouped)** Devices in Group: 7 Licenses Available: 38 ^

<input type="checkbox"/>	ID	Name	Location	App Installed	IP Address	Description	Actions
<input type="checkbox"/>	AC7701100...	360i bizhub 360i	-	✗	10.10.221.219	Add a description...	 
<input type="checkbox"/>	AA1R01101...	4052 bizhub 4052	-	✓	10.15.232.193	Add a description...	 
<input type="checkbox"/>	AA2K01101...	C300i bizhub C300i	-	✓	10.15.232.191	Add a description...	 

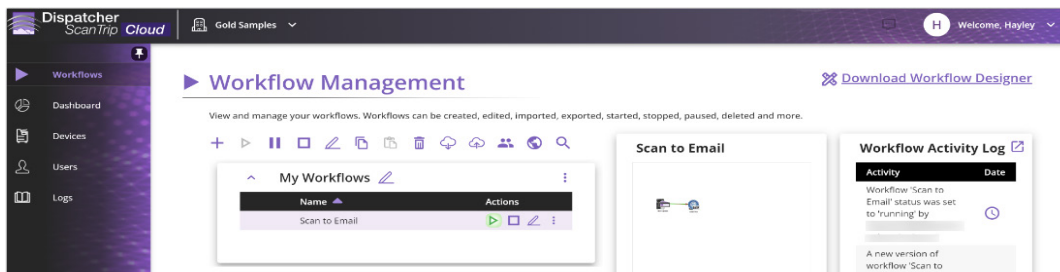
Step 5. Share Workflows

Workflows must be shared before they can be used on a device or by a tenant member:

- Device - To run a workflow on a device, you must share the workflow with the device.
- Tenant member - Workflows are automatically shared with their creator. For all other tenant members, you must share the workflow with them before they can run it.

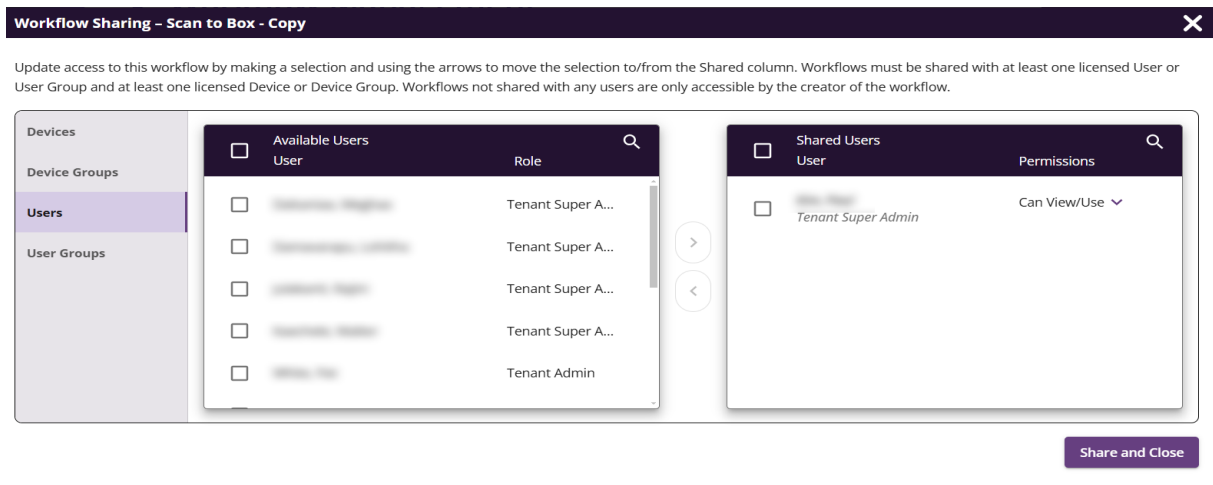
To share a workflow, do the following:

1. In Dispatcher ScanTrip Cloud, access the Workflow Management page.
2. Locate the workflow on the page.



3. In the Actions column, select the **Ellipsis** button for the workflow you want to share. Note that workflows in the Sample Workflows table are not sharable.
4. Select Sharing from the menu that appears. The [Workflow Sharing](#) window appears:
5. In the left panel, select a category. The “Available” and “Shared” panels populate accordingly.

6. Select one or more users or devices that need access to the workflow. Use the arrows to move the selected options to the “Shared” column.
7. Once the “Shared” panel contains the items with which you want to share the workflow, select Share and Close.



Step 6. Start Workflows

Only running workflows are available for use at the MFP. Do the following:

1. In ScanTrip Cloud, select the Workflows tab. The Workflow Management page appears.
2. Select a workflow and click on the associated **Start/Resume** button in the Actions column. You can choose one of Dispatcher ScanTrip Cloud's sample workflows or you can create your own. For more information on how to create or edit workflows, see the [Workflow Management](#) and [Using the Workflow Designer](#) sections of the Dispatcher ScanTrip Cloud Online Help.

Tenant configuration is now complete, and you can start using your Dispatcher ScanTrip Cloud workflows!

LICENSING

Dispatcher ScanTrip Cloud currently has two licensing options: Trial and Term. Trial licenses can be converted to Term licenses in two ways.

Upgrading a Trial License

You can upgrade your Trial license to a Term license. Do the following:

1. Purchase a Term license from MarketPlace. You will be provided with a purchase code via email.
2. In Dispatcher ScanTrip Cloud site, select the User menu, and then select **Settings** from the menu that appears.
3. In the Licensing area, enter your purchase code into the Purchase Code field of the Upgrade License area of the page.
4. Select **Submit**.

Replace a Trial License

You can create a tenant with a Term license in place of your Trial license by importing existing workflows into your new tenant. Do the following:

1. Set up a new tenant using your new Term license by following steps 1 - 4 above.
2. In the Trial license tenant, select the Workflows tab. The Workflow Management page appears.
3. Export any workflows you want to use in your new Term license tenant. For more information about exporting workflows, see the [Exporting](#) section of the Workflow Management help page.
4. In your new tenant, select the Workflows tab.
5. Select the Import icon. The file explorer appears.
6. Import any of the exported workflows into your new tenant.
7. Start your workflows, as described in "[Step 6. Start Workflows](#)" above.

