



SmartSource[®] Series

Processing SmartSource Feature Upgrade Requests in Digital Check Software Online

November 2016

Class B

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Processing SmartSource Feature Upgrade Requests in Software Online

You have received this document with feature upgrade style(s) that you purchased for your SmartSource unit(s). This document will assist you in processing your feature upgrade requests.

Prerequisites

The SmartSource feature upgrade process begins by contacting your Digital Check sales representative to discuss and purchase the features you would like to add. *(If you are reading this document, you've already done this!)*

Upon purchase, the upgrade styles are provided as licenses you then need to activate and apply to specific SmartSource units. The licenses you will be activating are loaded into your Digital Check Software Online account. *(Again, if you are reading this document, your licenses are already in your account waiting for you.)*

Also included with your order is the Digital Check SmartSource Feature Upgrade Utility software, Version 2.1. The complete feature upgrade process requires tasks to be completed in both the Feature Upgrade Utility and in Software Online as follows:

1. Use the SmartSource Feature Upgrade Utility to generate an Upgrade Request file.
Tip! *The Feature Upgrade Utility includes its own full-featured User Guide help file to assist you with the tasks you need to carry out in that software.*
2. Use Software Online to submit the Upgrade Request and the selected licenses, and then to generate an Upgrade Response file.
3. When you have finished working in Software Online, return to the Feature Upgrade Utility to process the Upgrade Response file and apply the activated licenses to specific units.

Important! *Before running the SmartSource Feature Upgrade Utility, ensure that the SmartSource appropriate system software is first installed. Your SmartSource system and network must be fully functional before you run the Feature Upgrade Utility. Refer to the utility's User Guide for further instructions on software requirements.*

What to do now: Download and install the SmartSource Feature Upgrade Utility program if you do not already have it. Run the Feature Upgrade Utility and generate an Upgrade Request file by following Tasks 1-3 as described in the utility's User Guide. When you have an Upgrade Request file, return to Software Online. You can leave the Feature Upgrade Utility running, as you will be returning to it shortly.

Working In Software Online

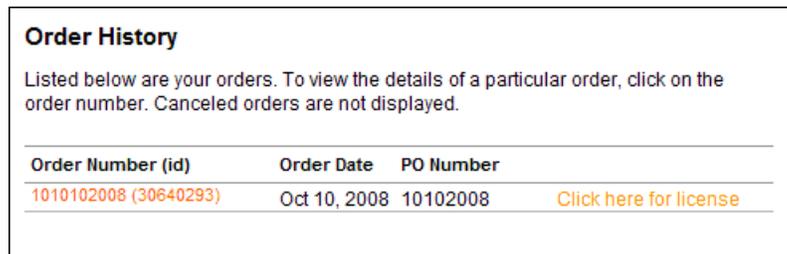
Tip: This part of the upgrade process is described as Task 4 in the SmartSource Feature Upgrade Utility program's User Guide.

Now you will use Software Online to match up the purchased licenses with the styles and devices you have saved in the Upgrade Request file.

1. Sign in to Software Online.
 - If you have more than one account, a screen displays on which to select the customer account where your SmartSource feature upgrade orders reside.
 - If you have only one account, or after you have selected the appropriate account, the Order History screen displays.

2. Select **Order History** under the Software heading in the navigation bars at left.

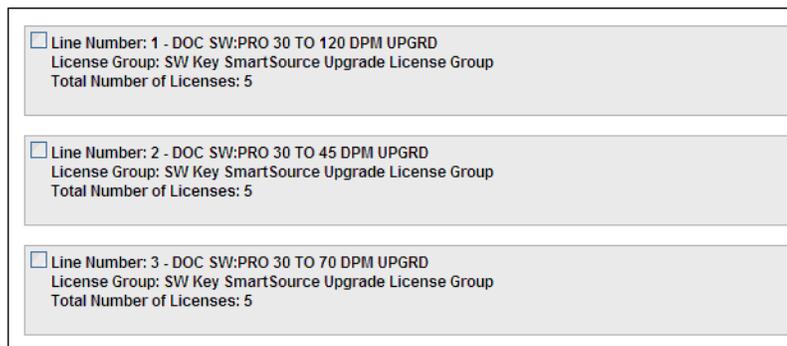
Tip: The column titled "Order Number (id)" has links to order summaries (like receipts). The links in the third untitled column jump to details about the upgrade licenses within each order.



Order Number (id)	Order Date	PO Number	
1010102008 (30640293)	Oct 10, 2008	10102008	Click here for license

Figure 1. Sample "Order History" Screen

3. On the line item for an order you wish to process, click **Click Here for License**. The License Information screen displays. Each shaded box corresponds to a specific upgrade style and shows the number of available licenses for each that you have already purchased and that can be activated.



<input type="checkbox"/> Line Number: 1 - DOC SW:PRO 30 TO 120 DPM UPGRD License Group: SW Key SmartSource Upgrade License Group Total Number of Licenses: 5
<input type="checkbox"/> Line Number: 2 - DOC SW:PRO 30 TO 45 DPM UPGRD License Group: SW Key SmartSource Upgrade License Group Total Number of Licenses: 5
<input type="checkbox"/> Line Number: 3 - DOC SW:PRO 30 TO 70 DPM UPGRD License Group: SW Key SmartSource Upgrade License Group Total Number of Licenses: 5

Figure 2. Section of "License Information" Screen

- Select one or more checkboxes to indicate you will be activating one or more licenses for that upgrade style.

Tips:

- The "License Group" listed in each shaded box refers to a specific software product. The License Group for SmartSource feature upgrade styles is "SW Key SmartSource Upgrade License Group." You may activate licenses only within one License Group at a time. If your account contains various types of License Groups, you must process the activations for each License Group separately.
- You must select a license for every unique style in the Upgrade Request file or else the request will be rejected in Step 7 below. It is not possible to process a single Upgrade Request file in more than one sitting.
- While you look for the licenses to activate, it may be helpful if you can also view either the Upgrade Request file or the summary of styles (both of which are functions within the SmartSource Feature Upgrade Utility), or be able to switch to that view as needed.

- Click the **Generate** button to initiate the activation process. The Generate Licenses screen displays. This screen enables you to review the license activations you have selected. If you need to correct this list, click the Back button on your browser to return to the License Information screen.

Generate Licenses		
This page allows you to generate the selected licenses.		
	Number of Activations Purchased	Number of Previous Activations
DOC SW:PRO 30 TO 45 DPM UPGRD	100	4
	Number of Activations Purchased	Number of Previous Activations
DOC SW:PRO COLOR UPGRD	100	4
	Number of Activations Purchased	Number of Previous Activations
DOC SW:PRO OCR UPGRD	100	4
	Number of Activations Purchased	Number of Previous Activations
DOC SW:PRO HOPPER 1 TO 50 DOCS UPGRD	100	7

Figure 3. Sample "Generate Licenses" Screen

- If the list is correct, go to the bottom of the screen to enter the name of the Upgrade Request file that you created in the SmartSource Feature Upgrade Utility. Click the **Browse** button to navigate to the saved file.

Tip: You must not upload an Upgrade Request file more than once. When the Upgrade Request file is accepted in Step 7 below, each of the licenses you have selected will be depleted by the number of times the style is used in the file. (Note the "Available Licenses" count.) If you accidentally reuse an Upgrade Request file that you've already processed, the licenses will still be depleted. Software Online logs the device serial numbers, but does not check to see if the styles you want are already on the device or not. Therefore take care to note which Upgrade Request files you have already submitted to Software Online so that you don't use up licenses unnecessarily.

- Click the **Generate** button to create an Upgrade Response file. The View Licenses screen displays. At this point the purchased styles are activated and no corrections are possible.

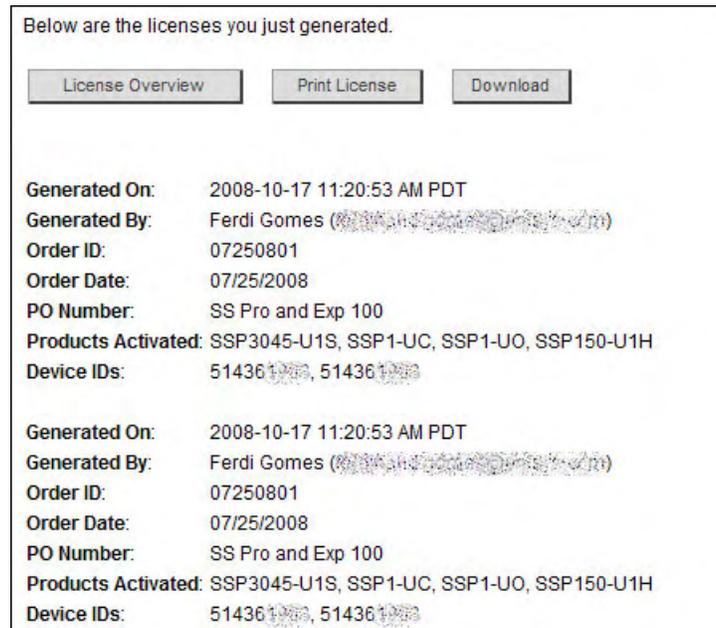


Figure 4. Sample "View Licenses" Screen

- Select the **Download** button at the top of the screen to save the Upgrade Response file. You will need this file when you return to the SmartSource Feature Upgrade Utility to complete the upgrade process.

Tip: If you wish, you may rename the file for your own identification purposes. However, we recommended that you maintain the word "response" and the original file extension in the name.

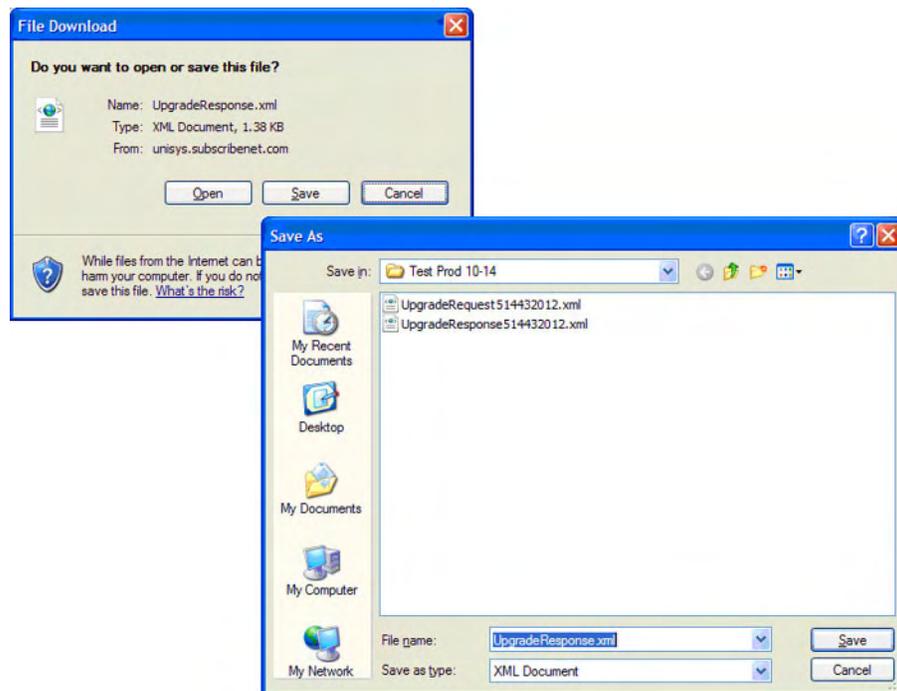


Figure 5. Downloading the Upgrade Response File

9. To view or print a summary of the licenses you just activated, click the **License Overview** or **Print Licenses** button as seen in Figure 4.

If you have additional Upgrade Request files to process, click **Order History** under the Software heading in the navigation bars at left to repeat this procedure as needed.

Otherwise, you are ready to return to the SmartSource Feature Upgrade Utility and resume the process there at Task 5.

After You've Generated an Upgrade Response File

When you have saved the Upgrade Response file from Software Online, you may sign out of Software Online. Complete the SmartSource feature upgrade process by following Tasks 5-6 in the SmartSource Feature Upgrade Utility program's User Guide.

Notes

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