Interact for Lexmark

Installation and Setup Guide

Version: 3.7.x
Compatible with ImageNow, Version 6.7.x and Perceptive Content, Version 7.x

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Lexmark™ Enterprise Software

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Interact for Lexmark

Interact for Lexmark is a software application that lets a Lexmark Multifunction Printer (MFP) user convert paper documents to electronic images, index them, and store them in a Perceptive Content (formerly ImageNow) system—all with a few button clicks on the printer's control panel. Once captured, the document is immediately available for subsequent retrieval and optional workflow processing using Content Client or WebNow.

There are several components to Interact for Lexmark:

- You run Interact for Lexmark by placing a document in the Automatic Document Feeder or on the scanner glass and then selecting an application from the home screen on the control panel. The device scans the document and then sends the document to Perceptive Content Server.
- Perceptive Content Server receives, processes, and stores the scanned document so that you can view the document using Perceptive Content Client.
- Perceptive Content Client or WebNow is where you view scanned documents. Perceptive Content Client Management Console is also where you assign workflow routing if you want Interact for Lexmark to add newly scanned documents to workflow queues automatically.
- Perceptive Content Integration Server handles the communication between your Lexmark device and Perceptive Content Server.
- The Embedded Web Server allows you to configure your Lexmark device from a remote computer and check the status of your device. You use the Embedded Web Server to upload initialization (INI) files and make other configurations.

This document explains how to install Interact for Lexmark and how to change settings for Interact for Lexmark by modifying the profile.ini files.

Interact for Lexmark is licensed per device.

Install Interact for Lexmark on Windows

This section provides instructions for installing Interact for Lexmark.

About Interact for Lexmark installation

Before you start this installation, make sure that you have installed and tested the following products. The documents referenced in this list are available in the Customer Portal on www.perceptivesoftware.com.

- Install and test Perceptive Content Server and at least one Perceptive Content Client. Refer to the appropriate *Perceptive Content Server and Client Installation and Setup Guide* for your platform and database.
- Install and test Integration Server. Refer to the *Perceptive Integration Server Installation and Setup Guide* for more information.
- Verify that your system meets the requirements for this product. For product technical specifications and system requirements, go to www.perceptivesoftware.com, click Customer Portal, and then log in. The Technical Specifications document for this product version is available on the Product Documentation tab.

The following steps outline the high-level procedures that you perform when installing Interact for Lexmark. Full instructions for each step appear in separate sections.

1. Download and install Interact for Lexmark.
2. If necessary, open a firewall port so that Perceptive Integration Server can communicate with Interact for Lexmark.
3. Verify that Integration Server is running.
4. Establish a connection between Integration Server and the device.

After you complete these steps (refer to the following section for detailed instructions), continue to the Configure Interact for Lexmark sections of this document to learn how to create Interact for Lexmark application and profile definitions and configure device authentication.

Install Interact for Lexmark

Perform the following steps to download and install Interact for Lexmark.

Download Interact for Lexmark, using the following procedure.

1. Go to the Enterprise Software website at www.perceptivesoftware.com and log in to the Customer Portal.
2. In the **Product Downloads** page, search for all downloadable items for the version of Interact for Lexmark you want to use, which includes the product installer (FLS file) and product documentation.

   The following table contains information that indicates the correct FLS file for your printer. For a list of supported printer models for v1.2, v2.0, v3.1, and v4.0, refer to the *Perceptive Content Technical Specifications* for your Perceptive Content release.

FLS File Name	Corresponding Printers
interact_e1_mfp.fls	eSF v1.x printers
interact_e2_mfp.fls	eSF v2.x printers
interact_e3-4_s2.fls	eSF v3.x and v4.x printers
interact_e4_s3.fls	eSF v4.x 4.3-inch screen printers

3. Download the relevant files to a temporary directory on your computer.

Install Interact for Lexmark using the following procedure:

1. Type the printer IP address into the address field of your Web browser and then press ENTER to access the Embedded Web Server for the device. The IP address of your printer may appear on the top left corner of your touch screen. The Embedded Web Server allows you to configure your device from a remote computer and check the status of the device.

   Note If you do not know the IP address of the printer, print a network setup page and locate the IP address in the TCP/IP section. For information on printing a network setup page, refer to the "Print a network setup page" section of this document.

2. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions or Solutions (eSF)**.

- Click **Settings** > **Embedded Solutions**.

3. Click **Install**.
4. Click **Choose File** to browse to the folder where you extracted the FLS file.
5. Select the appropriate flash file, and then follow the instructions to complete the installation.

   Note If you are unsure about which flash file to use, refer to the *Interact for Lexmark Release Notes*.

When installation is complete, upload the profile.ini file. For more information on uploading the INI files, refer to the **Send profile definitions to a device** section of this document.

Open a firewall port

You must have a firewall port open for Perceptive Integration Server to communicate information from Interact for Lexmark to Perceptive Content Server. If you have already opened a firewall port for the Integration Server web application server, skip this procedure.

1. Open the Windows utility that manages the firewall on the Integration Server. For example, on Windows XP, on the Windows Taskbar, click **Start > Control Panel > Windows Firewall**, and then click the **Exceptions** tab.
2. Click **Add Port**.
3. In the **Add a Port** dialog box, in the **Name** box, type the name of the web application server that uses the port, which is probably Content Integration Server.
4. In the **Port** box, type the port number for the Integration Server computer. The default port is 6070 (or 6075 for secure communication).
5. Make sure **TCP** is selected and then click **OK**.
6. In the **Windows Firewall** dialog box, click **OK**.

Verify that Integration Server is running

Before you proceed, verify that Perceptive Integration Server is running.

1. Make a note of the IP address of the Integration Server computer.
   1. On the Windows Taskbar, click **Start > Run**, type `cmd` in the **Run** dialog box, and then click **OK**.
   2. In the **Command Prompt** window, type `ipconfig` and press ENTER.
   3. Under Ethernet adapter Local Area Connection, copy the number in the IP Address row.
   4. Close the **Command Prompt** window.
2. On a different computer, in a web browser, enter the IP address of the device:

   `http://<IP address>:<server port number>/Admin`

In this URL, **<IP address>** is the address you copied earlier in this procedure and **<server port number>** is the port open for Integration Server, as described in the **Open a firewall port** section of this document.

Establish a connection between Integration Server and the device

Complete the following steps to establish a connection between the Perceptive Integration Server web application server and the Lexmark device. From this section of the Embedded Web Server, you can also set how long the screen can remain idle before the home screen appears and upload a profile configuration file from a previous version of the application.

Complete this procedure for each device using Interact for Lexmark.

1. Type the printer IP address into the address field of your Web browser and then press ENTER to access the Embedded Web Server for the device. The IP address of your printer may appear on the top left corner of your touch screen. The Embedded Web Server allows you to configure your device from a remote computer and check the status of the device.

   Note If you do not know the IP address of the printer, print a network setup page and locate the IP address in the TCP/IP section. For information on printing a network setup page, refer to the Print a network setup page section of this document.

2. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions** or **Solutions** (**eSF**).
   - Click **Settings** > **Embedded Solutions**.
3. On the **Solutions** tab, select **Interact for Lexmark**, and then click **Configure**.
4. In the **Content Services IP** box, enter the IP address or fully qualified host name of the Integration Server computer. For more information about this IP address and port, refer to the **Open a firewall port** section.
5. Type the Perceptive Content Services user name, password, and port in the fields provided.

   Important The Content Services user name is a user account reserved exclusively for authenticating the device to Perceptive Content Server. The Content Services user name for each MFP must be unique so that Content Server can establish a unique session with each device.

   We recommend setting up a user account within Perceptive Content for this purpose only and then assigning the appropriate drawer, document type, and workflow privileges to the account.

   Note The Perceptive Content Services Port is set to port 6070 by default. If the profile authentication is set to **None**, then the application uses the Content Services user name and password to access Perceptive Content Server.

6. In the **Screen Timeout** field, set how long (in seconds) the screen can remain idle before the home screen appears.
7. If an earlier version of the application has been previously installed, click **Choose File** to add a profile configuration file from that version of the application. This automatically creates the profiles defined in the configuration file.

   Notes

   - Only the profile file needs to be updated from the earlier version.
   - Interact for Lexmark 3.x.x does not support UCF files exported from older versions of the application.
8. Click **Apply**.

Print a network setup page

If the printer is attached to a network, print a network setup page to verify the network connection. This page also provides important information that aids network printing configuration.

1. Make sure the printer is on and that **Ready** appears.
2. On the home screen, select **Menus**.
3. Select **Reports**.

4. Select **Network Setup Page**. The network setup page prints, and the printer returns to the home screen.
5. Check the first section on the network setup page and confirm that **Status** is **Connected**.

If Status is **Not Connected**, the LAN drop may not be active, the network cable may be malfunctioning, or, if you have a wireless printer model, the wireless network may not be configured properly. Contact your administrator for a solution and then print another network setup page.

For more information on network configuration for your device, refer to the Networking Guide on the **Software and Documentation** CD that came with your device and the Embedded Web Server **Administrator's Guide** on the Lexmark website.

Configure Perceptive Content Server

After installing Interact for Lexmark, use the following procedures to install the Interact for Lexmark license and grant access privileges to a customized security group.

Install the Interact for Lexmark license

Prior to performing the following procedure, make sure you obtain an Interact for Lexmark license. The type of license you purchase depends on the number of devices that run Interact for Lexmark applications. To obtain the required license, contact your Enterprise Software Support representative.

1. Download the Interact for Lexmark license to the folder on your Perceptive Content Server computer where you have saved your other Content license files.
2. In the **Content** login screen, in the menu bar, click **License Manager**.
3. In the **License Management** dialog box, select **Upload Licenses** and then click **OK**.
4. Browse to the folder that contains the Interact for Lexmark license.
5. Double-click the license and then, in the **Content License Manager** dialog box, click **Upload**.
6. In the **License Generation – Server Information** dialog box, enter the values required for user authentication and server information and then click **OK**.
7. When the **Successfully uploaded license** message appears, click **OK**.
8. Restart Perceptive Content Server.

Configure Interact for Lexmark

After you finish setting up Perceptive Content Server to receive documents from Interact for Lexmark, you need to edit the profile definitions to customize Interact for Lexmark.

You create profile definitions using the profile.ini file. A profile definition contains all the information your device needs to process a particular type of scanning job while requiring minimal input from the user.

The following sections describe the flexibility of Interact for Lexmark profile definitions and provide instructions configuring the INI file and uploading it to the device.

Overview

Interact for Lexmark provides two modes of interaction with the user: One Touch Scanning and Profile Selection. In One Touch Scanning mode, the user clicks one time to initiate scanning and automatic indexing. In this case, all the index key values are preconfigured. You can confirm that your device is configured for One Touch Scanning mode if the device begins scanning when you press an application button on the home screen.

In Profile Selection mode, the device user selects the index key values assigned to the documents the user is scanning. The number of user choices in this mode depends on how you set up the profile definition.

When you finish creating profile definitions, you must send them to the device for testing before making them available to users. For more information, refer to the “Test the application” section of this document.

Administrator-modifiable values for Interact for Lexmark fall into two categories:

- Content profile settings, such as drawer or workflow queue
- Device scanner settings, such as page orientation or file type

Profile settings and device scanner settings appear in the device control panel in scrolling lists. You control how these fields behave by editing statements in the profile definition. The following procedures show you how to display fields, preset their values, and grant users the option of selecting or entering their own values for these fields.

To perform any of the customizing tasks in the following sections, perform the following steps.

1. In the folder where you extracted the ZIP file, make backup copies of the original **profile.ini** file. By making backup copies, you can restore default behavior to Interact for Lexmark without the need to reinstall.
2. Open the **profile.ini** file with a text editor. The **profile.ini** file is a sample profile definition containing all the possible settings. Make the changes you need, as described in the following sections, and be sure to save as a plain text file.
3. Save the file when you finish modifying them.
4. Send the profile definitions to a device.

Profiles

Each profile you define appears as a button on the device control panel. You can create as many profiles as you need by adding a new profile definition setting from the Embedded Web server and then uploading a profile.ini file for each profile definition. Note that the user works with one profile at a time. The illustration below shows how a profile appears on the home screen of the device. You can customize the text for the icon as well as the image.

Profile definitions

A profile definition contains all the information your device needs to process a particular type of scanning job. You can create as many profile definitions as you need. After you create the profiles, you send them to a device. When scanning a document, a user touches the appropriate scan profile to use for that job.

Each profile must be uploaded individually to the device using the Embedded Web Server.

Send profile definitions to a device

Perform the following steps when you want to send new or modified application and profile definitions to your device. For multiple devices, repeat this procedure for each device. This procedure sends the configuration files, which contain all profile definitions. However, only enabled profiles appear on the device control panel.

Note When testing new profiles, send the configuration files to only one device and test them on that device. When you have verified that the profiles are working to your satisfaction, send the updated configuration files to the other devices in your facility.

1. Make sure that the device is on and that you have a live IP connection to the device. For more information, refer to the Configure Interact for Lexmark section of this document.
2. Open your web browser, type the device IP address into the address field, and then press ENTER.

   Note If you do not know the IP address of the device, print a network setup page and locate the IP address in the TCIP/IP section. For information on printing a network setup page, refer to the Print a network setup page section of this document.
3. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Solutions** (**eSF**).
   - Click **Settings > Device Solutions > Embedded Solutions** or **Solutions (eSF)**.
   - Click **Settings > Embedded Solutions**.
4. On the Solutions tab, click Interact for Lexmark and then click Configure.
5. In the **Profile** section, click **Add**.
6. Configure the following settings.
   - **Icon Text**—Type the name of the profile that will appear on the printer home screen. This value should not exceed 20 characters.
   - **Icon**—Browse to an image file that represents the profile on the printer home screen. This field is optional. For more information on file sizes and types, refer to the mouse-over help.
   - **Icon When Pressed**—Browse to an image file that will be displayed while the icon is being pressed. This field is optional. For more information on file sizes and types, refer to the mouse over help.
   - **Profile Configuration File**—Choose the configuration file that you want to associate with this profile. The configuration file contains definitions for the profile settings.
   - **Show Pre-Scan Prompt**—Select this option to prompt the user before scanning to place the document into the automatic document feeder (ADF) or on the scanner glass.

- **Show Scan Confirmation**—Select this option to show a screen confirming the user's selections after scanning a document.
- **Authentication Type**—Select **None** to use the Content Services user name and password configured on the application configuration settings. Select Username/Password to prompt users to enter the Perceptive Content server credentials on the printer. If the application is configured to be accessed securely at the printer, then you can select Use MFP authentication credentials.

  Notes

  - Use MFP authentication credentials work only if the user name and password used on the printer are the same as the Perceptive Content server credentials.
  - For MFP authentication credentials to be used for user accounting, two additional custom properties must be added in Perceptive Content for the Document Type used by the user: badge_id and user_name.
  - For more information on securing applications at the printer, refer to the *eSF Security Manager Administrator's Guide*.

7. Click **Apply**.

   Note Keep the Embedded Web Server window open for setting the authentication type in the Configure device authentication section.

Turn on One Touch Scanning mode

Complete the following steps to enable or disable One Touch Scanning mode.

Note When you turn off One Touch Scanning mode, you enable Profile Selection mode.

1. In the **profile.ini** file, go to the application definition you want to change.
2. Complete one of the following options.
   - To enable One Touch Scanning Mode, set **onetouchscan.enabled** to TRUE.
   - To disable One Touch Scanning Mode, set **onetouchscan.enabled** to FALSE.
3. Save the **profile.ini** file and send the application definition to the device.

Document key settings in the profile definition

The procedures in this section define the document key values you assign to new documents so that they can be easily found in the Perceptive Content repository. Document keys include drawer, document type, folder, tab, Field3, Field4, and Field5, whose values can be created or reused by device users at the time a document is sent to Perceptive Content. Every document must have values assigned to drawer, document type, and at least one other document key. In addition, you can define any number of custom properties for a document type. Custom properties, therefore, are a supplementary set of keys for documents that require more extensive indexing.

The procedures in this section explain how to show or hide specific document keys, including custom properties, in the device control panel and how to grant or deny the ability to change these values to the user at the device.

Show or hide a field

The following procedure determines whether the device user will see a specific field. It does not give the user the ability to change the value in the field. To do that, refer to the Allow a user to change a value section of this document.

1. In the **profile.ini** file, go to the profile definition you want to change.
2. Find the appropriate **<*object*>.display** field in the profile definition, where object is a placeholder for the item you are showing or hiding, such as drawer, folder, or workflow.queue.
3. Change the values for the following settings.
    - To display the item in the control panel, set **<*object*>.display** to `TRUE`.
    - To hide the item in the control panel, set **<*object*>.display** to `FALSE`.

      Note By enabling display of the drawer, document type, or workflow.queue objects, the control panel displays a fixed list of the values previously defined for these objects. For document keys such as folder or tab, or for a custom property, you can optionally prompt the user to enter a value.

Change the default value displayed for a field

A default value is a preset value for a field. You can either force the user to accept the value or let the user change it.

Important Perceptive Content Server requires that every document must be submitted with at least three document keys defined: drawer, document type, and any one of the following: tab, folder, Field3, Field4, or Field5. Therefore, when reviewing your profile definition, make sure that you have defined default values for the document keys. (You can always allow the user to select an alternate value for one or more keys.)

1. In the **profile.ini** file, go to the profile definition you want to change.
2. Find the **<*object*>.default.value** setting that you want to change, where object is a placeholder for the item.
3. Set **<*object*>.default.value** to the default value you want, as shown in the following example.

```
drawer.default.value=Vouchers
```

Notes

- Default values are case-sensitive.
- You can set fields to certain special values, as indicated in the following table.

Value	Description
__DeviceIPAddress__	Populates the field with the device IP address.
__DeviceName__	Populates the field with the device name.
__HostName__	Populates the field with the name of the host application, which is inserver6 for ImageNow 6.7.x and inserver for Perceptive Content 7.x
__UniqueID__	Populates the field with the unique ID for the document.

Create an exclusive list of values for a field

You can display a group of values for a user to choose from when assigning a value to an index key, similar to the combo box control used in data entry applications. 1. In the profile.ini file, go to the profile definition you want to change.

1. Find the ***<object>*.list.values** setting that you want to change, where *<object>* is a placeholder for the item.
2. Set ***<object>*.list.values** to a comma-separated list of strings, as in the example. Do not type a space after the comma.

   ```
   field5.list.values=Southeast,Central,Northwest
   ```

   You can select an option that appears in a column in the control panel.

   Notes

   - If you set a default value for an item that contains a list, the default value must be one of the items in that list.
   - You cannot use lists of values for drawer or document type.

Allow a user to change a value

The following procedure explains how to make a field modifiable by the device user or to deny that privilege to the user for a specific field.

1. In the **profile.ini** file, go to the profile definition you want to change.
2. Find the ***<object>*.user.modifiable** field in the profile definition, where *<object>* is a placeholder for the item. Set ***<object>*.user.modifiable** to:

   - `TRUE` to allow users to change the value for this field, as shown in the following example.

     ```
     folder.user.modifiable=true
     ```

   - `FALSE` to prevent users from changing the value for this field, as shown in the following example.

   ```
   tab.user.modifiable=false
   ```

Allow a user to change custom property values

Custom properties are always associated with specific document types. You cannot reference them individually in the profile definition. The user sees only the custom properties associated with the selected document type.

1. In the **profile.ini** file, go to the profile definition you want to change.
2. To make all custom property fields mapped to the selected document type user-modifiable, set **custom.properties.user.modifiable** to `TRUE`.
3. To prevent users from changing any custom property fields with this setting, set **custom.properties.user.modifiable** to `FALSE`.

Set up device statistics or workflow routing

The following sections describe procedures required for those applications of Interact for Lexmark that need to track device statistics or route new documents to a workflow queue.

Assign queue privileges

If you want Interact for Lexmark to add newly scanned documents to workflow queues automatically, use this procedure to grant access to all of the queues that receive documents.

1. On the **Content** toolbar, click **Manage**.
2. In the left pane, click **Workflow**, select the workflow and then click **Modify**.
3. In the **Content Workflow Designer** window, perform the following procedure.
    1. Double-click the queue.
    2. In the **Queue Properties** dialog box, in the left pane, click **Users**, and then click **Add**.
    3. In the **Select Users and Groups** dialog box, on the **Groups** tab, under **Available Groups**, click the user name associated with the Content Services account, click **Add**, and then click **OK**. For more information about the Content Services account, refer to **Establish a connection between Integration Server and the device**.
    4. In the **Queue Properties** dialog box, in the **Lexmark Interact Devices** row, click in the **Add** column until the **Grant** icon displays.
    5. Click **OK**.
    6. Repeat these sub steps for each workflow and queue to which you want to grant access to device users.
4. On the **File** menu, select **Close**.

Documenting workflow settings

1. In the **profile.ini** file, go to the profile definition you want to change.
2. Find the **workflow.display** field in the profile definition, and change the values for the following settings.
    - To display the workflow button in the control panel, set **workflow.display** to TRUE.
    - To hide the workflow button in the control panel, set **workflow.display** to FALSE.
3. Find the **workflow.user.modifiable** field in the profile definition, and change the values for the following settings.
    - To allow users to change the value for this field, set **workflow.user.modifiable** to TRUE.
    - To prevent users from changing the value for this field, set **workflow.user.modifiable** to FALSE.

Enable SSL

Follow the Enable SSL directions in the Configure Integration Server topic of Integration Server Help.

Test the application

Before you proceed, make sure you sent the updated profile.ini file, which contains the profile definitions, to the device.

Prerequisite

If the profile.ini file contains Native (non-English) characters, save the profile.ini file in UTF-8 encoding before uploading the file to the printer.

1. Go to the device, click the application button, and select the new profile.
2. Scan as many pages as necessary to use the options that you included in the application.
3. Return to your Content Client computer and log in to Perceptive Content Server where the documents captured by Interact for Lexmark are deposited.
4. Inspect the documents in Content Explorer and Content Viewer to verify that they were scanned and indexed according to your requirements.
5. If necessary, update your profile definitions, resend the INI file, and repeat this procedure.

Uninstall, upgrade, or reinstall Interact for Lexmark

Complete the following steps to upgrade or reinstall Interact for Lexmark.

1. Uninstall Interact for Lexmark from the device.
2. Access the Embedded Web Server by opening your web browser, typing the device IP address into the address field, and then pressing ENTER.
3. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions** or **Solutions** (**eSF**).
   - Click **Settings** > **Embedded Solutions**.
4. Click the Interact for Lexmark box.
5. Click the **Uninstall** button.
6. On the **Uninstall Solutions** page, click **Start Uninstall**.
7. Restart the Lexmark device.

   Note It is important to restart the Lexmark device after uninstalling Interact for Lexmark, or you may receive the following error from the Embedded Web Server: There is not enough space to install the applications in this flash file. Please make sure you have the correct file and try again.
8. If required, reinstall Interact for Lexmark. Refer to the Install Interact for Lexmark on Windows section of this document for instructions.

Operate Interact for Lexmark with the Remote Operator Panel

You can operate Interact for Lexmark remotely from any computer through the Embedded Web Server as long as the computer and the device are on the same network.

Notes

- Only one Remote Operator Panel user can control the device at a time.
- The Remove Operator Panel is not available on all devices.

Enable the Remote Operator Panel

1. To access the Embedded Web Server, open your web browser, type the device IP address into the address field, and then press ENTER. The IP address of your printer may appear on the top left corner of your touch screen.

   Note If you do not know the IP address of the printer, print a network setup page and locate the IP address in the TCP/IP section. For information on printing a network setup page, refer to the Print a network setup page section.

2. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions** or **Solutions** (**eSF**).
   - Click **Settings** > **Embedded Solutions**.
3. In the Installed Solutions column, click Remote Operator Panel.
4. Click the **Configure** tab.
5. Click the **Enabled** box and then click the **Apply** button.

Access the Remote Operator Panel

1. To access the Embedded Web Server, open your web browser, type the device IP address into the address field and then press ENTER. The IP address of your printer may appear on the top left corner of your touch screen.

   Note If you do not know the IP address of the printer, print a network setup page and locate the IP address in the TCP/IP section. For information on printing a network setup page, refer to the Print a network setup page section.

2. Click **Applications**.
3. In the **Installed Solutions** list, click **Remote Operator Panel**.
4. Click the **Launch VNC Applet** button.

The device control panel opens in another web browser window. Refer to the *Interact for Lexmark Getting Started Guide* for end-user instructions.

Troubleshoot Interact for Lexmark

Use the information provided in this section to troubleshoot Interact for Lexmark if a functional issue occurs. Troubleshooting information is divided into sections that describe a situation that could happen, along with the procedures to resolve the issue.

Note If you experience issues while using Interact for Lexmark, try restarting your Lexmark device. This often resolves issues you may encounter while using Interact for Lexmark.

The application icon does not appear on the Welcome screen

Sometimes after you have modified settings, the application icon no longer appears on the Welcome screen. To correct this, start and stop the application by following the screen prompts. If starting and stopping the application does not work, try restarting the device.

Scanned documents don't appear in Perceptive Content

Errors can occur when the web server and Perceptive Content Server are connected to the device. For some of these errors, Interact for Lexmark does not retry the scan job or notify the user of the scan failure. If this occurs, try the following solution steps:

- Review server log files for error information. The standard output log formats for Perceptive Content 7.x are:

  `inserver_i.log , inserverListener_yyyymmdd.log, inserverworker_yyyymmdd.log, and INServerMA_inserverMA_XXXXX_ma_yyyymmdd.log.`

- For ImageNow 6.7.x, the \inserver6\log\error_logs\xxxxmmdd\inserver_xxxxxx_xxx_xx.xx.xx.xxxxxx.log files are located in the \inserver6\logs folder. These log folders represent many types of errors.

If you are experiencing this issue and cannot identify the issue from the log file messages, contact your Enterprise Software Support representative. To assist in troubleshooting, you might be asked to read from or provide the log files.

Fix denied privileges and access

If an Interact for Lexmark user cannot access a drawer, folder or other item, verify that the correct access is set. For example, a user may experience one of the following access issues:

- If the user cannot access a drawer required by the application, an error message displays and prevents the user from submitting a document.
- If the user can access the drawer but the drawer field does not display on the control panel, Interact for Lexmark submits a document with the default drawer value copied from the INI file.
- If the user does not have access to a workflow queue required by the application, the import to Perceptive Content Server succeeds, but the document is not added to the queue.

To grant drawer or queue access, refer to the **Managing Content > Management Console > Users, Groups and Security of Content Administrator** help. To display fields in the device control panel, edit the appropriate profile definition in the profile.ini file and then refer to Document key settings in the profile definition section.

An application error has occurred

To check the system log, complete the following steps.

1. Open a Web browser, and then type the printer IP address in the address field. The Embedded Web Server displays.
2. From the navigation menu on the left, click **Settings** or **Configuration**.
3. Click Device Solutions > Solutions (eSF), or click Embedded Solutions.
4. Click the System tab > Log.
5. From the **Filter** menu, select an application status.
6. From the application menu, select an application, and then click **Submit**.
    - Adjust the scan settings. Select a lower scan resolution, or scan the document in black and white. You can also change to a smaller file format, such as PDF or JPG.
    - If you still cannot isolate the problem, contact your solutions provider for additional help.

Application cannot connect to Perceptive Content Server

1. Make sure the application settings match the settings for Perceptive Content Server. For more information on configuring Interact for Lexmark settings, refer to the Establish a connection between Integration Server and the device section of this document.
2. Make sure all appropriate network cables are securely connected and the network settings of the printer are correctly configured. For information on networking the printer, refer to the printer User's Guide or the Software and Documentation CD that came with the printer.
3. To check the system log, complete the following steps.
    1. Open a Web browser, and then type the printer IP address in the address field. The Embedded Web Server displays.
    2. From the navigation menu on the left, click **Settings** or **Configuration**.
    3. Click Device Solutions > Solutions (eSF), or click Embedded Solutions.
    4. Click the System tab > Log.
    5. From the **Filter** menu, select an application status.
    6. From the application menu, select an application, and then click **Submit**.
4. Make sure that the Perceptive Content Server is running and responding to client requests.

Application cannot authenticate user

- Check the application settings. Make sure the authentication options and Perceptive Content settings in the application configuration settings match the settings for the Perceptive Content Server. For more information, refer to the Configure Interact for Lexmark section of this document.
- Make sure printer authentication is configured. If the application is configured to use printer authentication credentials, then the printer authentication settings must be configured from the Embedded Web Server. For more information on configuring the printer authentication settings, refer to the *Embedded Web Server Administrator's Guide* available at www.lexmark.com.
- Make sure you use the correct username and password. If a profile authentication is set to None, then the application will use Content credentials to authenticate users. Make sure to type the correct user name and password combination from the application configuration settings. If a profile authentication is set to Username/Password, then users are prompted enter their credentials.

- If you still cannot isolate the problem, then contact your solutions provider representative for additional help.

Application cannot associate scanned documents to workflow queues

Change the document keys. Scanned documents with the same set of document keys cannot be uploaded to the same workflow queue more than once. Make sure you define a distinct set of document keys for every document you want to assign to the same queue.

Appendix A: Embedded Web Server

You can use the Embedded Web Server to configure several settings for your Interact for Lexmark, such as indicating the URL of your Perceptive Integration Server. You can also export Interact for Lexmark settings to a UCF file for reuse, or import a UCF file.

For more information on using the Embedded Web Server, refer to the *Embedded Web Server Administrator's Guide* on the Lexmark website at www.lexmark.com.

Note To complete the steps in the sections below, you need to know the IP address of the printer. The IP address of your printer may display on the top left corner of your touch screen. If you do not know the printer IP address, then print a network setup page and locate the IP address in the TCP/IP section. For information on printing a network setup page, refer to the Print a network setup page section.

Export a configuration file

To export device settings to a UCF file for reuse, complete the following steps.

1. Type the printer IP address in the address field of your web browser and press ENTER.
2. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions** or **Solutions** (**eSF**).
   - Click **Settings** > **Embedded Solutions**.
3. On the **Solutions** tab, select **Interact for Lexmark**, and then click **Configure**.
4. Scroll to the bottom of the settings window and click **Export**.
5. Follow the prompts from your web browser to save the file.

Import a configuration file

To import Interact for Lexmark settings from UCF file. Note that no password is imported or exported so you need to finish the configuration.

1. Type the printer IP address in the address field of your web browser and press ENTER.
2. Perform one of the following tasks.
   - Click **Settings** > **Device Solutions** > **Embedded Solutions** or **Solutions (eSF)**.
   - Click **Settings** > **Embedded Solutions**.
3. On the **Solutions** tab, select **Interact for Lexmark**, and then click **Configure**.
4. Scroll to the bottom of the settings window, and then click **Import > Browse**.
5. In the **File Upload** window, select the UCF file you want to upload and the click **Open**.
6. Click **Start**. When the system finishes importing the file, the Configure window displays showing the settings you imported.
7. Click **Apply** to save these settings.

Appendix B: INI Configuration Tables

This appendix contains information about the options available for setting up Interact for Lexmark. Note that not all scan settings are available on all devices.

profile.ini settings

The following table contains profile definitions and sample data for the settings in the profile.ini configuration file. This table displays the INI settings under separate bracketed group headings for each profile definition, such as [Lexmark], in the order the groups appear in the INI file. Each subsequent profile requires its own unique bracketed group heading and as many of the settings as you want to enable for that application. Each setting offers two or more options, defined in the following table along with a description of each setting and its options. Use this table as a guide when you customize the file.

Setting	Options	Description
onetouchscan. enabled	TRUE FALSE	Turns One Touch Scanning mode on or off in the application. The default is `FALSE`.
drawer.display	TRUE FALSE	Displays or hides the Drawer button on the Document Keys screens. The default is `TRUE`.
drawer.user. modifiable	TRUE FALSE	Allows the user to select a different drawer. The default is `TRUE`.
drawer.default.value	A drawer name	Presets the selected drawer. The default is `Default`.
drawer.display.name	Any characters	Allows you set a custom label for the Drawer document key on the on the Document Keys screens. The default is `Drawer`.
doctype.user. modifiable	TRUE FALSE	Allows the user to select a different document type. The default is `TRUE`.
doctype.display	TRUE FALSE	Displays or hides the Document Type button on the Document Keys screens. The default is `TRUE`.
doctype.default.value	Any characters (but must be a configured document type in the Content Server).	Presets the selected document type. The default is `Default`.
doctype.display. name	Any characters	Allows you set a custom label for the Document Type document key on the Document Keys screens. The default is `Document Type`.

Setting	Options	Description
workflow.display	TRUE FALSE	Displays or hides the workflow queue button on the Workflow screen. The default is TRUE.
workflow.user. modifiable	TRUE FALSE	Allows the user to select a different workflow queue. The default is TRUE.
workflow.process.default. value	Enter the name of an existing process	Presets the selected workflow process. For more information on the existing workflow process names, contact the Perceptive Content server administrator.
workflow.queue. default.value	Enter the name of an existing queue in Perceptive Content.	The default is empty. For more information on the existing workflow queue names, contact the Perceptive Content server administrator.
folder.display	TRUE FALSE	Displays or hides the Folder button on the Document Keys screen. The default is TRUE.
folder.user. modifiable	TRUE FALSE	Allows the user to enter a folder. The default is TRUE.
folder.list.values	A comma- delimited list of strings	Use to specify the folders that appear to the user. For example: freshman, sophomore, junior, senior
folder.default.value	One item from folder.list.values	Presets the selected folder.
folder.display.name	Any string	The name displayed for the folder. The default is `Folder`.
tab.display	TRUE FALSE	Displays or hides the Tab button on the Document Keys screen. The default is TRUE.
tab.user.modifiable	TRUE FALSE	Allows the user to enter a value for tab. The default is TRUE.
tab.list.values	A comma- delimited list of strings	Use to specify the tabs that appear to the user. For example: active,inactive,injured

Setting	Options	Description
tab.default.value	One item from tab.list.values	Presets the selected tab value.
tab.display.name	Any string	The name displayed for the tab. The default is `Tab`.
field3.display	TRUE FALSE	Displays or hides Field3 on the Document Keys screen. The default is `TRUE`.
field3.user.modifiable	TRUE FALSE	Allows the user to enter a value for Field3. The default is `TRUE`
field3.list.values	A comma- delimited list of strings	Displays a list of values from which the user can select for Field3.
field3.default.value	One item from field3.list.values	Presets the selected Field3 value.
field3.display.name	Any string	The name displayed for Field3. The default is `Field3`.
field4.display	TRUE FALSE	Displays or hides the Field4 element on the Document Keys screen. The default is `TRUE`.
field4.user.modifiable	TRUE FALSE	Allows the user to enter a value for Field4. The default is `TRUE`.
field4.list.values	A comma- delimited list of strings	Use to specify values the user can select for Field 4.
field4.default.value	One item from field4.list.values	Presets the selected Field4 value.
field4.display.name	Any string	The name displayed for Field4. The default is `Field4`.
field5.display	TRUE FALSE	Displays or hides the Field5 element on the Document Keys screen. The default is `TRUE`.

Setting	Options	Description
field5.user.modifiable	TRUE FALSE	Allows the user to enter a value for Field5. The default is TRUE.
field5.list.values	A comma- delimited list of strings	Use to display a list of values from which the user can select for Field5.
field5.default.value	One item from field5.list.values	Presets the selected Field5 value.
field5.display.name	Any string	The name displayed for Field5. The default is `Field5`.
custom.properties.user.modifiable	TRUE FALSE	Displays all custom properties in the selected document type and allows the user to change the values. The default is TRUE.
doctypelist.value	A comma- delimited list of strings	Displays only document types within this document type list. The default is empty, meaning all document types display.
scan.settings.user. modifiable	TRUE FALSE	Specifies if the user can select the scan settings for the pages they want to scan. When this value is FALSE, the individual scan settings that follow are ignored and the Scan Settings page does not display. When this value is TRUE, the user can modify the scan settings on the Scan Settings page, which take effect when the paper is scanned. The default is TRUE.

Setting	Options	Description
scan.setting.page.size	MIXED AUTO_SIZE_ SENSE LETTER LEGAL EXECUTIVE FOLIO OFICIO A3 A4 A5 JB4 JB5 PHOTO_3X5 PHOTO_4X6 BUSINESS_ CARD BOOK_ ORIGINAL STATEMENT TABLOID	Specifies the size of the paper to scan. The default is `LETTER`, which means the scanner automatically senses the size of each scan page. **Note** Not all scan sizes are available on all models of devices.
scan.setting.page.size. modifiable	TRUE FALSE	Specifies if the user can select the paper size to scan using the scan.setting.page.size setting. The default is `TRUE`.
scan.setting.duplex.mode	ONE_SIDED TWO_SIDED SECOND_SIDE_R OTATION	Makes the scanner scan only one side of the originals or both sides of the originals. The TWO-SIDED option means the print is facing the same direction on both the front and the back sides. The SECOND_SIDE_ROTATION option means the print is facing the opposite direction on the back side of the page. The default is `ONE_SIDED`.
scan.setting.duplex.mode.m odifiable	TRUE FALSE	Allows the user switch between single-sided and double-sided scanning. The default is `TRUE`, which means the user can switch DUPLEX modes.

Setting	Options	Description
scan.setting.document.image	MIXED PHOTO TEXT	Indicates the type of documents being scanned. The default is `MIXED`.
scan.setting.document.image. modifiable	TRUE FALSE	Allows the user choose the document image type in the scan.setting.document.image setting. The default is `TRUE`.
scan.setting.page.orientation	PORTRAIT LANDSCAPE	Indicates the orientation of the paper that the device is scanning. The default is `PORTRAIT`.
scan.setting.page.orientation. modifiable	TRUE FALSE	Allows the user choose the orientation in the scan.setting.page.orientation setting when this setting is equal to TRUE. The default is `TRUE`.
scan.setting.color.mode	FULL_COLOR GRAYSCALE BLACK_AND_WHITE	Indicates the mode in which the device is scanning. If the device does not scan in color, the setting defaults to GRAYSCALE. The default is `BLACK_AND_WHITE`.
scan.setting.color. mode.modifiable	TRUE FALSE	Allows the user choose the color mode in the scan.setting.color.mode setting when this setting is equal to `TRUE`. The default is `TRUE`.
scan.setting.resolution	72, 150, 200, 300, 400, 600	Indicates the scanner resolution. If the resolution setting is too high for the scanner, the scanner automatically uses the highest possible resolution. The maximum resolution for the XPS and PDF file types is 300 DPI. If a value greater than 300 DPI is specified, the resolution defaults to 300 DPI. Additionally, you cannot scan in color at greater than 300 DPI. The default is `300`.
scan.setting.resolution.modifiable	TRUE FALSE	Allows the user choose the scanner resolution in the scan.setting.resolution setting when this value is equal to TRUE. The default is `TRUE`.

Setting	Options	Description
scan.setting.file.type	TIFF, PDF, MTIFF, JPEG, XPS	Designates the output file type. In order to avoid LZW compression (which is incompatible with Content) in the TIFF and MTIFF file formats, TIFF and MTIFF file types can only be scanned in black and white, text content mode. Note that the MTIFF option stands for multi-page TIFF file. XPS is not available on all devices. The black and white color mode is not available for the JPEG file type. The default is `TIFF`.
scan.setting.file.type. modifiable	TRUE FALSE	Allows the user choose the output file type in the scan.setting.file.type setting when the setting is equal to TRUE. The default is `TRUE`.
scan.setting. background.removal	-4 through +4	These advanced scan settings are not user modifiable. Specifies the amount of background removal in the scanned image. Higher values progressively clip more light shades to white. The default is `0`, which equates to neutral.
scan.setting.color. dropout	NONE RED GREEN BLUE	These advanced scan settings are not user modifiable. Specifies which, if any, color is converted to white ("dropped out") in the scanned image. This setting only has an effect if the color mode of the scan.setting.color.mode setting is equal to BLACK_AND_WHITE or GRAYSCALE. The default is `NONE`, meaning no colors are dropped out of the scanned image. This setting is not available on all devices. Each color has an associated threshold setting (for example, scan.setting.color.dropout.red.threshold) that determines the color intensity required for dropout. (Refer to the next row for this setting.)

Setting	Options	Description
scan.setting.color. dropout.<n>. threshold	0 to 255	These advanced scan settings are not user modifiable. The default value is 128.This means that colors that include a color value above 128 appear lighter (the <n> component is converted to white). Colors that include an <n> color value below 128 appear darker. <n> = RED, GREEN, or BLUE. In general, increasing the value of this setting converts fewer shades to white and more shades to black. Decreasing the value of this setting converts more shades to white and fewer shades to black. Each threshold setting is used only if its associated color has been selected as the value for the scan.setting.color.dropout setting. The default value is 128. This setting is not available on all devices.
scan.setting.contrast	0 to 5	These advanced scan settings are not user modifiable. Specifies the contrast level of the scan. The range of values for this setting are 0 to 5, with 0 representing the least scan contrast, and 5 representing the most. Additionally, you can use BEST_FOR_CONTENT to allow the device to select automatically an optimal contrast value based on the scan content. The default is `BEST_FOR_CONTENT`, which means that the device automatically selects the scan contrast level.
scan.setting.jpeg. quality	5 to 90 BEST_FOR_ CONTENT	These advanced scan settings are not user modifiable. Specifies the image quality to retain by the JPEG compression algorithm. The values for this setting range from 5 to 90, in order of increasing quality and scan image size. Additionally, you can use the value `BEST_FOR_CONTENT` to allow the device to select automatically an optimal quality value based on the scan content. The default is `BEST_FOR_CONTENT`, which means that the device automatically selects the JPEG compression quality.
scan.setting.mirror. image	On Off	These advanced scan settings are not user modifiable. Specifies whether to save the scanned image as a mirror image of the original scan page or pages. This setting is not available on all devices. The default is `Off`, which means that the scanned image is not saved as a mirror image of the original scan.
scan.setting.negative.image	On Off	These advanced scan settings are not user modifiable. Specifies whether to save the scanned image as a negative (for example, color inverted) image of the original scan page or pages. This setting is not available on all devices. The default is `Off`, which means that the scanned image is not saved as a negative image of the original scan.

Setting	Options	Description
scan.setting.shadow.detail	-4 to +4	These advanced scan settings are not user modifiable. Specifies how much detail appears in shadows or shaded image content. The range of values for this setting are -4 to +4, where -4 is the least shadow detail, and +4 is the most shadow detail. The default is `0`, meaning that moderate shadow detail is recorded.
scan.setting.edge.to.edge	On Off	These advanced scan settings are not user modifiable. During normal scanning, the scanner places a small border around the edge of the document. Set the value of this setting to On to eliminate the border and scan from one edge of the document to the other. When this setting is enabled, it overrides the scan.setting.edge. erase.<n> setting. The default is `Off`.
scan.setting. sharpness	1 2 3 4 5	These advanced scan settings are not user modifiable. Specifies the sharpness of the scanned image. The range of values for this setting are 1 to 5, where 1 is the least sharp and 5 is the most sharp. Values less than 3 soften the image, and values greater than 3 sharpen the image. The default is 3, meaning that the scanned image is not smoothed or sharpened. The image is not changed.
scan.setting.custom.job	On Off	These advanced scan settings are not user modifiable. Specifies whether multiple sets of scan pages can be combined into a single scan job. In between each set of scan pages, the user is prompted if the job is complete. The default is `Off`, meaning each scan job will consist only of a single set of scan pages.
scan.setting.edge. erase.<n>	top bottom right left	These advanced scan settings are not user modifiable. Specifies the width in millimeters (mm) of the image to erase at the <n> edge, where <n> can be top, bottom, right, or left. When this setting is enabled, it overrides the scan.setting.edge.erase. <n> setting. The default is `0`, which means that no image data should be erased at the <n> edge.
scan.setting. darkness	An integer from 1 to 9	These advanced scan settings are not user modifiable. Specifies the darkness level of the scan. For this setting, a value of 1 is the lightest and 9 is the darkest. The default is 5, which means that the darkness level is moderate.