Interact for Lexmark

Getting Started Guide

Version: 4.0.x

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Date: May 2016

Table of Contents

Overview

Interact for Lexmark is a software application that lets any Lexmark Multifunction Printer (MFP) user convert paper documents to electronic images, index them, and store them in a Perceptive Content 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.

Using Interact for Lexmark

In this section, you'll learn how to scan documents directly into Content, where you can then view the document using Content Client or WebNow. When you initiate Content on your Lexmark device, the device prompts you to enter index values to assign to the documents you scan. The number of choices you get depends on how your administrator configured the application. After you enter the index values, you select the appropriate scan settings and scan the document.

Scan a document into Content

The following procedure explains how to scan pages into Content. For more information on Content concepts and scan settings, refer to the subsequent sections.

1. Load the document into the Automatic Document Feeder of the device or place a single page on the scanner glass. For more information on different methods of loading documents, refer to the user's guide for your Lexmark device.

2. On your Lexmark device, select Interact for Lexmark.

    Note The default name for the Interact for Lexmark button is Interact for Lexmark, although the name is configurable by your administrator. If your administrator configured multiple applications for your device, the home screen displays a button for each application.

3. If prompted, type your user name and password.

    Note If your administrator configured the device for one-touch scanning, skip to step 13.

4. This step is optional if at least three document keys already have values that you do not want to modify. On the **Document Keys** screen, select the button for the document key you want to add or modify and then use either the on-screen keyboard to type a new value for the document key or select the appropriate option from the list.

    Note The required document keys by default are Drawer, Document Type, and one additional document key. Your administrator may assign different labels to Drawer and Document Type.

5. Select the RIGHT arrow to advance to the next screen.

6. Optional. On the **Custom Properties** screen, select the button for the custom property you want to modify and then enter the value using either the on-screen keyboard, number pad, or calendar, or select the appropriate option from the list. If necessary, use the RIGHT and LEFT arrows to scroll through the list.

7. Select the RIGHT arrow to advance to the next screen.

8. Optional. On the **Workflow** screen, select the workflow process and workflow queue you want to associate with this document.

1. Click the **Select a Process** button and select the workflow process. If necessary, use the RIGHT and LEFT arrows to scroll through the list.

2. Click the **Select a Queue** button and select a workflow queue. If necessary, use the RIGHT and LEFT arrows to scroll through the list.

9. Select the RIGHT arrow to advance to the next screen.

10. Optional. Adjust the scan settings, such as the resolution and output file type. For details about each of the scanner settings, refer to the **Scan settings** section.

11. Select the RIGHT arrow to advance to the next screen.

12. The device displays a message to confirm that your document is ready to scan. Make sure that your document is on the scanner glass or loaded in the Automatic Document Feeder and then select the RIGHT arrow to advance to the next screen. Note that depending on how your administrator configured the application, the device may prompt you to adjust the scan settings. Adjust the settings if necessary, and then press **Scan It**.

13. After the scan confirmation page appears, you have two options.

- To scan another document with the same settings, select **Scan the Next Page**.

- If you are finished scanning, select **Finish the Job**.

When you are done scanning, you can view the document using Content Client or WebNow.

What are document keys?

Document keys are Content index keys that store the metadata for a document. Content uses the values in these index keys to retrieve scanned documents. There are a total of seven document keys in Content.

Use the Drawer document key to separate groups of scanned documents into their broadest categories. In addition to the Drawer document key, six document keys are available to store information on scanned documents. The information stored in these keys uniquely identifies each document. The common usages for document keys are defined in the following table.

Document Key	Description
Drawer	Content assigns this value at the moment of capture. It is typically a department name or task name, like Accounts Payable.
Folder	This value is typically an account number, invoice number, social security number, or similar identifier.
Tab	Any value suitable as a search key.
Field3	Any value suitable as a search key.
Field4	Any value suitable as a search key.
Field5	Any value suitable as a search key.
Document Type	This document key typically categorizes the document by type, such as Invoice, and permits the addition of custom property values.

As part of a scan profile, your administrator may configure each document key in one of four ways.

- Assign options that you can select

- Assign a default value to the document key that you can change

- Assign a default value to the document key that you cannot change

- Configure the system so that a particular document key does not display on the Document Keys prompt

What are custom properties?

Custom properties are property fields that you can populate with data relating to an ImageNow document. They let you store unlimited indexing metadata beyond the standard document keys. Your administrator manages custom properties for your Lexmark device by creating custom properties and then associating them with existing document types or project types before they are available to use. When using Interact for Lexmark, you populate these fields with data when you select a document type that includes custom properties.

You view custom properties in Content Viewer, Content Explorer, Project Viewer, and WebNow Viewer in the Properties pane. You search for documents based on custom property values in either Content Explorer or WebNow Explorer. All custom properties for a document are associated with the document record, so each document has its own data instance.

What are workflow processes and queues?

Workflow is a series of queues and routes that represent a business process that a document follows. Documents in the system may or may not be in a workflow. The selection of workflow processes and queues that are available on your Lexmark device depends on how your administrator configures each scan profile.

What is a scan profile?

A scan profile is a reusable collection of document keys, workflow settings, and scan settings that provides all of the options you need to capture a document on your Lexmark device and conduct related processing tasks with Content Client or WebNow. A profile allows you to select the appropriate document index keys, the workflow process and queue, and the custom property values for a document. A profile can also provide a pre-defined set of scan settings, such as scan resolution, page orientation, and output file type.

Your administrator configures scan profiles. Depending on how your administrator configures a profile, there may or may not be workflow processes or custom properties associated with the profile. The following example profiles illustrate the way profiles work to store your scanned document in ImageNow.

Example profile: Accounts Payable 1	
Document keys	Your administrator set a specific value for the drawer: "Accounts Payable." You cannot change this value. Likewise, the document type is always "Default."
Workflow processes and queues	You can select a destination workflow process for the documents or accept the default "Invoices" workflow process. Likewise, you can select a different destination workflow queue for the documents or accept the default "Approval Required" queue.

Example profile: Accounts Payable 1	
Custom properties	The device displays all custom properties for the document type, except those to which your administrator assigned system variables, and it allows you to change the values.
Scan settings	You can change any of the scan settings.

Example profile: Accounts Payable 2	
Document keys	Your administrator set the values for drawer, document type, folder, and tab. The device does not prompt you to enter any index key values; therefore, the Field3, Field4, and Field5 document keys remain unassigned throughout the scanning procedure.
Workflow processes and queues	Your administrator did not associate workflow processes and queues with this document, so the Workflow screen does not display during the scanning procedure.
Custom properties	Your administrator did not assign custom properties to any of the document types, and so the Custom Properties screen does not display during the scanning procedure.
Scan settings	The device scans only one side of each page and scans pages of differing sizes. The device scans pages in portrait orientation, in black and white, at 200 DPI, and saves the files to ImageNow in MTIFF file format.

Scan settings

The scan settings listed below may be different depending on the model of your Lexmark device. Certain settings may not be shown or be modifiable depending on how your administrator configures the scan profiles. Your administrator can also configure several advanced scan settings such as color balance and contrast level using the INI file.

For more information on scanning, refer to the user's guide for your Lexmark device.

Sides (Duplex)

This option indicates whether to scan one side or both sides of the page.

- Select One Sided if the original documents you are scanning are simplex (printed on one side).

- Select Two Sided if the original documents you are scanning are duplex (printed on both sides) and the back page of the two-sided original can be read by turning over the original along a long edge of the paper.

- Select Second Side Rotation if the original documents you are scanning are duplex and the back page of the two-sided original can be read by flipping the original along a short edge of the paper.

Content

This option indicates the original document type. Content affects the quality and size of your scanned file.

- Select Text/Photograph when your originals are a mixture of text and pictures. The scanner attempts to apply higher contrast to the text areas and reproduce shades within the art.
- Select Photograph when your originals are mostly pictures. The scanner attempts to render all tones and shades as exactly as possible. This setting increases the time it takes to scan, but it ensures a reproduction of the full dynamic range of tones in the original document. Selecting this option increases the size of the file.
- Select Text when your originals are mostly text characters or are black and white line art. This setting emphasizes sharp, black, high-resolution text against a clean, white background.

Color

This option adjusts the scanner color mode. Select Full Color, Grayscale, or Black and White.

Page Orientation

This option indicates whether the original document is in portrait or landscape orientation.

- Select Portrait to scan the original document in portrait orientation, with the short edges of the paper at the top and bottom.
- Select Landscape to the original document in landscape orientation, with the long edges of the paper at the top and bottom.

Resolution (DPI)

This option adjusts the output quality of your file. Select 75 DPI, 150 DPI, 200 DPI, or 300 DPI.

- A lower DPI value decreases the image resolution. Decreasing the image resolution reduces the file size and the time needed to scan your original document.
- A higher DPI value increases the image resolution. Increasing the image resolution increases the file size and the time needed to scan your original document.

File Type

This option sets the output format for the scanned image.

- Select TIFF to create a TIFF image file. If you have multiple pages, this creates a separate TIFF file for each page. Content saves these separate TIFF files in one Content document.
- Select JPEG to create and attach a separate JPEG file for each page of your original document, viewable by most Web browsers and graphics programs.
- Select MTIFF (multiple TIFF) if you have multiple pages and you want all of the pages within a single TIFF file. Content saves this multiple-page file in one Content document.

  Notes

  If you select TIFF or MTIFF as your output format, the Content type is automatically set to Text, and the Color Mode is automatically set to Black and White.

  A TIFF file is usually larger than an equivalent JPEG.

- Select PDF to create a single PDF file with multiple pages, viewable with Adobe Reader. Adobe Reader is provided free by Adobe at www.adobe.com.

> **Note** The maximum resolution that you can scan a PDF is 300 DPI. If you set the resolution to more than 300 DPI and then select PDF, the device reduces the resolution to 300 DPI.

- Select XPS to create a single XPS file with multiple pages, viewable using an Internet Explorer hosted viewer and the .NET Framework or by downloading a third-party standalone viewer.

Original Size

This option sets the size of the document you are going to scan.

If the document you are scanning has multiple paper sizes, select Mixed Sizes to have the device automatically detect the paper size for the paper loaded in the scanner and scan to that size. For example, you can scan an original document that contains letter- and legal-size pages. Depending upon the model, the scanner may not sense all paper sizes. The scanner may prompt you to enter the paper size if it cannot determine the size on its own.