



Forms Premium

Administrator's Guide

June 2011

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Overview

This application lets users quickly and easily print frequently used documents from the printer control panel. First, configure a bookmark to point to the location of an electronic file. The electronic form or other document can be located on a Web site, a network drive, an FTP site, or a printer hard disk drive (HDD). Then, access the form or other document by touching the application icon on the printer home screen. Bookmarks can also be saved as shortcuts directly to the printer home screen for immediate access to your most used documents and forms.

A working knowledge of Lexmark printers is helpful for the effective use of this guide. For more information about your printer model, see the documentation that came with the printer.

Configuring the application

Accessing the Embedded Web Server

Most configuration tasks will be performed through the Embedded Web Server on the device. To access the Embedded Web Server:

- 1 Type the device IP address or hostname in the address field of your Web browser.
- 2 Use the navigation menu on the left to access settings and report menus.

Note: If the device IP address or hostname is not readily apparent, you can find it by printing a network setup page.

Printing a network setup page

- 1 From the printer home screen, touch **Menus >Reports >Network Setup Page**. After the network setup page prints, the device will return to the home screen.
- 2 On the printout under TCP/IP, locate the IP Address or Fully Qualified Domain Name.

Changing display icons and labels

You can change the icons and associated text that appear on the printer home screen. If you do not want to use the default icons for an application, then you can import new icons to be used for both the pressed and unpressed button states.

Note: For information about compatible image file types and recommended file sizes, see the mouse-over help next to each field.

- 1 From the Embedded Web Server, click **Settings** or **Configuration**.
- 2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.
- 3 From Installed Solutions, click the name of the application you want to configure.
- 4 Click **Configure**.
- 5 Select each field you want to change.
- 6 Enter labels or browse to the appropriate image file.
- 7 Click **Apply** to save the settings or **Reset** to return to the previous settings.

Licensing the application

An electronic license is required for the application to run on selected printers.

If individual licenses are used, then you must install them locally on each printer. If you plan to use the application with several printers, then you may prefer to install the Lexmark License Server and obtain a network license for the appropriate number of devices.

For more information on purchasing a license for the application, contact your Lexmark representative.

Obtaining a license file

For local (individual) licensing

- 1 From the Embedded Web Server, click **Settings** or **Configuration**.
- 2 Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.
- 3 Click **System**.
- 4 Record the host ID (serial number).
Record only the string that appears after **Serial=**.
- 5 Contact your Lexmark representative, and provide the host ID to obtain the license file.

For network licensing

The server Host ID is required to generate the license file for network licensing. To collect the Host ID, contact your system support person and request the MAC address of the computer on which the license server resides. Then contact your Lexmark representative, and provide the Host ID (MAC address) to obtain the license file.


You can also find the Host ID using the Lexmark License Server.

Installing the Lexmark License Server

Note: Lexmark License Server is intended for use with Windows operating systems.

- 1 From the application package, launch the **LicenseServer.exe** file.
This executable file is located in <install location>\esf-license-app.
- 2 Click **Next**.
- 3 Select the installation method you want to use, and then click **Next**.
You have the option to unpack the installation files to a temporary directory from which they will be removed after the installation is complete, or to specify a location where the files will remain after the installation is complete.
- 4 If you do not want the server installed in the default directory, then click **Browse** to select an alternate location.
- 5 Click **Finish** to complete the installation.
- 6 After the Lexmark License Server installation is complete, click **Done**.

Collecting the Host ID

- 1 Click  or **Start** > **All Programs** or **Programs** > **Lexmark** > **Lexmark License Server** > **License Administration Tools**.
- 2 Click the **System Settings** tab.
- 3 Record the Host ID (MAC address).
- 4 Contact your Lexmark representative, and provide the Host ID.
The Host ID is required to generate the license file.

Licensing the printer

Using a local license

Using the Embedded Web Server

- 1 From the Embedded Web Server, click **Settings** or **Configuration**.
- 2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.
- 3 Under Installed Solutions, click the appropriate application link.
- 4 Click **License > Update License**.
- 5 Make sure **Local** is selected, and then click **Browse** to locate the license file.
- 6 Click **Update License**.

Using MarkVision Professional

- 1 In MarkVision Professional, select the device where the application is installed.
- 2 Click **Settings > Embedded Solutions > Solutions Management**.
- 3 Under the appropriate application, click **Update License**.
- 4 In the Update License window, select **Use a local license file**.
- 5 Click **Browse** to locate the license file.
- 6 Click **Update License**.

Using a network license

Copying the license file to the Lexmark License Server

Note: Before installing a network license using either the Embedded Web Server or MarkVision Professional, copy the license files to the license server.

- 1 Copy the license file to the following directory on the network license server:
C:\Program Files\Lexmark\LicenseServer\Licenses
- 2 On the host computer, open the Control Panel.
- 3 Under Administrative Tools, click **Services**.
- 4 Select **License Server**.
- 5 Stop, and then restart the **License Server** service.

Configuring the network license

- 1 From the Embedded Web Server, click **Settings** or **Configuration**.
- 2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.
- 3 Click **Network License**.

- 4 Enter the IP address or host name and optional port for the network license server where the license is stored. You can enter values for up to three separate servers.
- 5 In the Heartbeat Period field, enter a value of 2–60 minutes to designate how often the printer will ping the network license server to check for updates and maintain access to an electronic license.
- 6 In the Number of Retries field, enter a number of 1–5 to set the maximum number of times the printer can attempt to obtain a license before quitting.
- 7 Click **Apply**.

Updating the network license

Using the Embedded Web Server

- 1 Click **Solutions**.
- 2 Under Installed Solutions, click the appropriate application link.
- 3 Click **License > Update License**.
- 4 Select **Network**.
- 5 Click **Update License**.

Using MarkVision Professional

- 1 In MarkVision Professional, select the device where the application is installed.
- 2 Click **Settings > Embedded Solutions > Solutions Management**.
- 3 Under the appropriate application, click **Update License**.
- 4 In the Update License window, select **Use a network license server**.
- 5 Click **Update License**.

Configuring the application

The following procedure outlines in general terms how to configure bookmarks from the Embedded Web Server. For information on configuring and using the application from the printer control panel, see “Using the application from the printer control panel” on page 14.

For a comprehensive explanation of each setting available when adding or editing a bookmark, see the mouse-over help beside each field.

Note: When configuring bookmarks, more options are available from the printer Embedded Web Server than from the printer control panel.

Configuring bookmarks

- 1 From the Embedded Web Server, click **Settings** or **Configuration**.
- 2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.
- 3 In the Installed Solutions section, click the name of the application.

4 Click **Configure > Add**.

Note: You can also edit or delete existing bookmarks.

5 Type a name for the bookmark.

6 To create a bookmark within a folder, enter the name of the folder in the Folder Path field.

Note: If the folder does not yet exist, it will be created.

7 Adjust the remaining configuration settings as necessary.

Note: See the mouse-over help beside each field for a description of each configuration option.

8 Click **Apply**.

Exporting and importing configuration files

After configuring an application, you can export your current settings into a file that can then be imported and used to configure that application on one or more additional printers.

Exporting and importing application settings using the Embedded Web Server

Note: This is available only on select printer models.

Exporting configuration settings

1 From the Embedded Web Server, click **Settings** or **Configuration**.

2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.

3 From Installed Solutions, click the name of the application.

4 Click **Export**.

5 Follow the browser prompts to save the configuration file. You will have the option to enter a unique file name or use the default name.

Note: If a **JVM Out of Memory** error occurs, then repeat the export until the settings file is saved.

Importing configuration settings

1 From the Embedded Web Server, click **Settings** or **Configuration**.

2 Click **Device Solutions > Solutions (eSF)**, or click **Embedded Solutions**.

3 From Installed Solutions, click the name of the application.

4 Click **Import**.

5 Browse to the saved configuration file, and then load or preview it.

Note: If a timeout occurs and a blank screen appears, then refresh the browser, and then click **Apply**.

Configuring applications using MarkVision Professional (MVP)

Use MarkVision™ Professional (MVP) to configure multiple printers at one time.

Note: MVP can only be used for printers that support the Embedded Solutions Framework (eSF) 1.2 and 2.0. For more information, see “Checking which version of the Embedded Solutions Framework is installed on a printer” on page 19.

Installing solution descriptors on the MarkVision Server

Solution descriptors are XML files that are installed on the MarkVision Server. They describe to MVP how to configure an embedded solution, providing information about supported settings such as types, descriptions, ranges, defaults, and internationalization values and strings. Each embedded application includes a solution descriptor, which must be installed before the application can be configured.

Use one of the following methods to install a solution descriptor on the MarkVision Server:

Method one

- 1 From the MarkVision Professional Home screen, select **Embedded Solutions - Solutions Management** from the All Tasks list.
- 2 Use the Quick Find or Folders tabs to select a device.
Note: When a device managed by MVP is not supported by a specific task, its name will appear with a black line through it in the Quick Find or Folders tabs. Password-protected network devices are displayed in red. Enter the device password to gain access to the device.
- 3 Select the application from the list.
- 4 Click **Fetch Descriptor(s)**. This will read the solution descriptor from the device if this method is supported by the device. If it is not, a dialog will open so that you can browse to the file to be installed.

Method two

- 1 From the MarkVision Professional Home screen, select **Embedded Solutions - Solutions Management** from the All Tasks list.
- 2 Use the Quick Find or Folders tabs to select a device.
Note: When a device managed by MVP is not supported by a specific task, its name will appear with a black line through it in the Quick Find or Folders tabs. Password-protected network devices are displayed in red. Enter the device password to gain access to the device.
- 3 Click **Manage Descriptors**.
- 4 Click **Add**.
- 5 Browse to find the solution descriptor for the application.
- 6 Click **Open**.

Notes:

- The installed solution descriptor appears in the Plug-ins/Solutions on Server box. The solution descriptor details appear in the Details box.
- If the descriptor file is not valid, MVP 11.2 will display an error message.

7 Click **Close**.

Accessing application configuration settings using MarkVision Professional

Note: MarkVision Professional 11.2 or later required.

To configure a solution in MVP:

- 1 From the MarkVision Professional Home screen, select **Embedded Solutions - Solutions Management** from the All Tasks list.
- 2 Select devices using the Quick Find or Folders tabs.
Use **Ctrl + click** and **Shift + click** to select multiple devices.
Note: When a device managed by MVP is not supported by a specific task, its name will appear with a black line through it in the Quick Find or Folders tabs. Password-protected network devices are displayed in red. Enter the device password to gain access to the device.
All installed embedded solutions appear.
- 3 Select the solution to be configured.
- 4 Click **Fetch Descriptor(s)** to install the necessary solution descriptor onto the MVP server from the device.
- 5 Click **Configure**, and then adjust settings as needed.

Exporting and importing a configuration using MarkVision Professional

Exporting configuration settings

- 1 From the MarkVision Professional Home screen, select **Embedded Solutions - Solutions Management** from the All Tasks list.
- 2 Using the Quick Find or Folders tabs, select the device(s) where the application is installed.
Use **Ctrl + click** and **Shift + click** to select multiple devices.
Note: Password-protected network devices are displayed in red. Enter the device password to gain access to the device.
- 3 From the list, select the name of the application you want to configure, and then click **Export**.
- 4 Browse to find a location to save the universal configuration file (.ucf), and then click **Save**.







Importing configuration settings

- 1 From the MarkVision Professional Home screen, select **Embedded Solutions - Solutions Management** from the All Tasks list.
- 2 Using the Quick Find or Folders tabs, select the device(s) where the application is installed.
Use **Ctrl + click** and **Shift + click** to select multiple devices.
Note: Password-protected network devices are displayed in red. Enter the device password to gain access to the device.
- 3 From the list, select the name of the application you want to configure, and then click **Import**.
- 4 Browse to find the universal configuration file (.ucf), and then click **Add**.


Using the application from the printer control panel

Bookmarking forms




Adding a bookmark using the printer control panel

- 1 From the printer home screen, touch the application icon.
- 2 Touch **Options**.
- 3 Touch .
- 4 Type a name for the new bookmark. This name will be displayed when selecting a form to print.
- 5 If you want to use a PIN to limit access to the bookmark, then touch **Confidential**, select **On**, and then touch .
- 6 Touch .
- 7 If prompted, enter a four-digit PIN, and then touch .
- 8 Touch the location of the file you want to bookmark, and then touch .
 - **Network**—The form is on a network share.
 - **FTP**—The form is on an FTP site.
 - **HTTP**—The form is on a Web page.
 - **HTTPS**—The form is on a secure Web page.
 - **HDD**—The form is on a hard disk drive.
- 9 If you selected HTTP or HTTPS, then enter the URL of the bookmark.
- 10 If you selected Network or FTP, then select an authentication option, and then touch .

Authentication options include the following:

 - **Guest(Network Folder)/Anonymous**—This does not require users to be authenticated.
 - **Use device authentication credential**—This requires users to enter the authentication credentials as specified on the printer.
 - **Prompt for username and password**—This requires users to enter their system user name and password.
 - **Use static username and password**—This requires administrators to specify a static user name and password when they configure the bookmark. Users will not be prompted to enter these credentials at the printer.
- 11 Follow the instructions on the touch screen to enter the location of the file you want to bookmark. Use  to progress through the screens.



Editing or deleting a bookmark using the printer control panel

- 1 From the printer home screen, touch the application icon.
- 2 Touch the bookmark you want to edit or delete.
Note: You can delete multiple bookmarks at one time.
- 3 If necessary, touch **Options**.
- 4 Touch  to edit a bookmark or  to delete a bookmark.
- 5 Follow the instructions on the printer display to edit or delete the bookmark or bookmarks. Use  to progress through the screens.



Note: If the bookmark is confidential, then you will be prompted for the four-digit PIN.

Configuring folders for bookmarks

Adding a folder using the printer control panel

- 1 From the home screen of the printer control panel, touch the application icon.
- 2 If necessary, touch **Options**.
- 3 Touch .
- 4 Enter a name for the folder, and then touch .
The folder will appear in the list of bookmarks.


Adding a bookmark to a folder using the printer control panel

- 1 From the home screen of the printer control panel, touch the application icon.
- 2 Touch the folder you want to use.
- 3 Touch .
- 4 If necessary, touch **Options**.
- 5 Touch .
- 6 Enter the information for the new bookmark. For more information, see “Adding a bookmark using the printer control panel” on page 14.



Moving bookmarks using the printer control panel

Note: Bookmarks can only be moved using the printer control panel. Bookmarks cannot be moved using the Embedded Web Server.


- 1 From the printer home screen, touch the application icon.
- 2 Touch the bookmark or bookmarks you want to move.

- 3 Touch **Move**.
- 4 Touch the folder you want to move the bookmarks to.
- 5 Touch .
- 6 Touch **Move here**.



Editing or deleting a folder

- 1 From the home screen of the printer control panel, touch the application icon.
- 2 Touch the folder you want to edit or delete.
- 3 If necessary, touch **Options**.
- 4 To edit the folder, touch .
To delete the folder, touch .
- 5 Follow the instructions on the screen to edit or delete the folder.

Printing bookmarks




- 1 From the printer home screen, touch the application icon.
- 2 Touch the name of the bookmark or bookmarks you want to print, and then touch .
- 3 Follow the instructions on the screen to print the bookmark.





Searching for bookmarks and folders

- 1 From the printer home screen, touch the application icon.
 - 2 Touch .
 - 3 Enter a keyword in the Search For field, and then touch .
- The results of your search are displayed.

Saving bookmarks as shortcuts

You can turn frequently accessed bookmarks into shortcuts that show up on the printer home screen. Instead of touching the application to access the list of bookmarks, users can touch the shortcut to access the bookmark or bookmarks immediately.

- 1 From the printer home screen, touch the application icon.
- 2 Touch the name of the bookmarks you want to save, and then touch .
- 3 Touch .
- 4 Type a name for the shortcut, and then touch .

- 5 Select an icon graphic for the shortcut, and then touch .
- 6 From the confirmation screen, touch .
- 7 Touch  to print the shortcut, or touch  to cancel.

Note: The bookmark icon appears on the printer home screen. Because of space constraints, users may need to scroll through the printer home screen to access all of the available icons.

Troubleshooting

Forms are not available or are not working

Try one or more of the following:

MAKE SURE THE BOOKMARK IS CONFIGURED PROPERLY

For information on configuring bookmarks, see “Configuring bookmarks” on page 9.

MAKE SURE THE BOOKMARK IS POINTING TO THE CORRECT LOCATION

Verify that the form resides in the correct network location. The printer will not validate the location that the bookmark points to. If the URL or network location that was specified when the bookmark was created is incorrect, then the printer will not be able to access the document.

MAKE SURE PASSWORD-PROTECTED FOLDERS IN THE BOOKMARK HIERARCHY HAVE THE SAME PASSWORD

If you have created an HDD bookmark using the Embedded Web Server and the bookmark is located in a series of password-protected folders in the printer hard disk drive, then make sure that the folders have the same password.

Folders cannot be created using the Embedded Web Server

MAKE SURE THE FOLDER PATH IS ENTERED CORRECTLY

From the Embedded Web Server, in the Folder Path field, enter the folder name using the format: `/foldername/`. You must enter a `/` before and after the folder name.

Appendix

Checking which version of the Embedded Solutions Framework is installed on a printer

- 1 Type the printer IP address or hostname in the address field of your Web browser.
- 2 From the Embedded Web Server, click **Reports > Device Settings**.
- 3 Scroll down until you see Embedded Solutions (usually found near the bottom).
- 4 Under Embedded Solutions, the value next to **Framework** = signifies the installed version.

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