



# Custom Prompting eSF Application

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Admin Guide

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# Overview

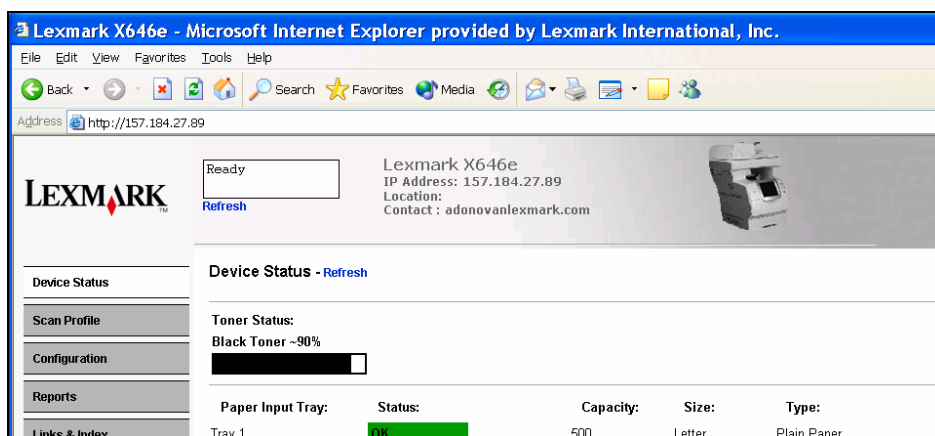
The Custom Prompting embedded solution is an application that allows a customer to define custom prompts to gather information from users at Lexmark MFP's. The data entered by the users in these prompts is then saved, along with the scanned image, as a meta-data file to a specified network location.

The format of the prompts, meta-data file, and storage location are all configurable settings within the application. This will allow the customer to configure the application to save the image and meta-data in a manner that incorporates best with their back-end systems.

# Configuration

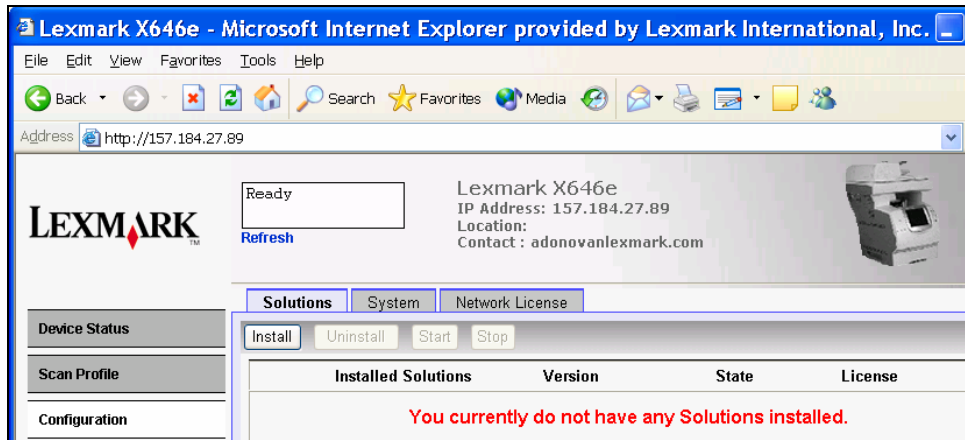
## Configuring the Application using a Web Browser

1. The application can be configured from the MFP's embedded web server. To access the web server, you must launch a browser and enter <http://<MFP IP Address>> as the URL. For example, if your MFP's IP address is 10.34.58.123, you would enter <http://10.34.58.123>. A page similar to the one shown below will be displayed. This is the home page for the embedded web server.

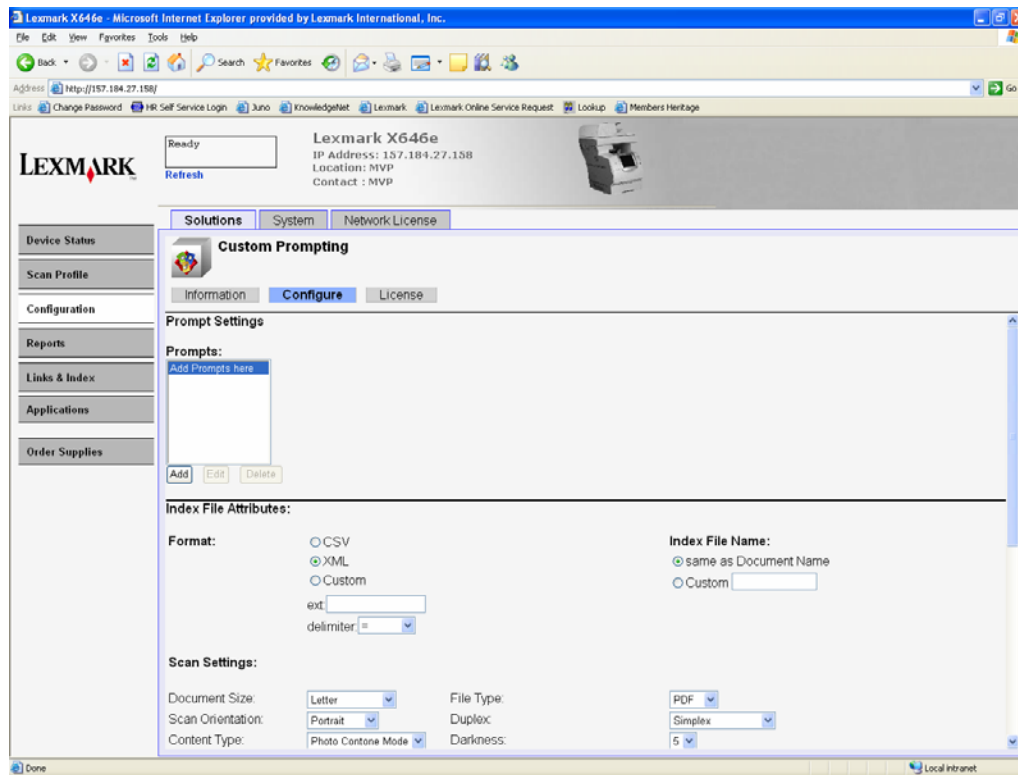


2. From the home page, you will choose the "Configuration"/"Settings" link from the list of options on the left-hand side of the page.
3. On the "Configuration" page, you will choose the option, "Embedded Solutions" from the "Other Settings" list. This will take you to a page showing all of the embedded solution

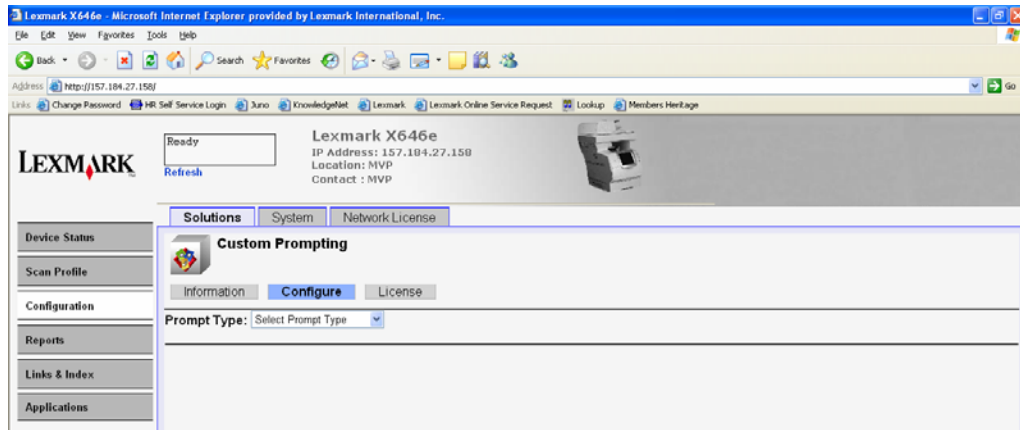
applications currently loaded on the MFP. This list may be empty if there are no embedded solutions installed prior to installation of this application.



4. When you choose the “Custom Prompting” link, you will be taken to the home page for this embedded application. Choose the Configure Tab. This page contains a list of all of the configurable settings for the application.



5. The first item to configure for the “Custom Prompting” application is the prompts that will be presented to the user for the purposes of gathering the meta-data for a scan job. To begin creating and configuring these prompts, choose the “Add” button under the “Prompts” box. You will be taken to a screen similar to the one shown here.



6. You will first choose the type of prompt you wish to create from the “Prompt Type” dropdown list. The available selections, along with a brief description of their purpose, are listed here. Simply select the prompt type you desire from the drop-down box.
- a. Integer Prompt – An integer prompt would be used when the user must enter a number as part of the meta-data. For example, if you are prompting for age or number of required signatures, this prompt type would be used.
  - b. String Prompt – A string prompt would be used when the user must enter a text value as part of the meta-data. For example, if you are prompting for name or city, this prompt type would be used.
  - c. Single Selection Prompt – A single selection list prompt would be used when a user must select from a small list of available choices to be included in the meta-data. This prompt would allow only one selection by the user. For example, if a user must select their birth month or their eye color, this prompt type would be used.
  - d. Multi Selection Prompt - A multi selection list prompt would be used when a user must select from a small list of available choices to be included in the meta-data. This prompt would allow one or more selections by the user. For example, if a user must select the types of bank accounts they have or the corporation locations at which they have worked, this type of prompt would be used.
  - e. Check Prompt – A check prompt would be used if the user must select True or False for a meta-data item. For example, if the user must indicate their willingness to relocate or whether they are a US Citizen, this prompt type would be used.
  - f. Message Prompt – A message prompt would only be used to present information to the user. It will not prompt the user to enter any sort of meta-data. For example, if you want to tell the user to load their document into the Automatic Document Feeder or describe an upcoming prompt to them, this prompt type would be used.

7. Once the prompt type is selected, you will now configure how the prompt is displayed on the MFP screen. Required items for each prompt configuration are indicated by an \*. Steps a-f describe the configuration for each of the 6 prompt types described above:

**a. Integer Prompt**

When an Integer Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

Name\* – This is the name that will be displayed in the configuration screens for the application as well as included as the “tag” in the index file. This will not be visible to the user at the MFP. No spaces are allowed for this field.

Prompt Text\* – This is the text that will be displayed on the MFP touch screen that instructions the user what data to enter.

Default Value – If desired, a value can be pre-filled in the integer prompt. This should only be set if the value is going to be the same for most users.

Minimum – This will be set to the minimum allowed value for the data.

Maximum – This will be set to the maximum allowed value for the data.

Password(mask numbers) – This field indicates that the number being entered is a password. By setting this value to “Yes”, the numbers will be masked, or replaced with \*’s, instead of displaying the actual numbers entered.

For the example of prompting for age, the following values could be entered as displayed in the screen shot below:

Name: Age

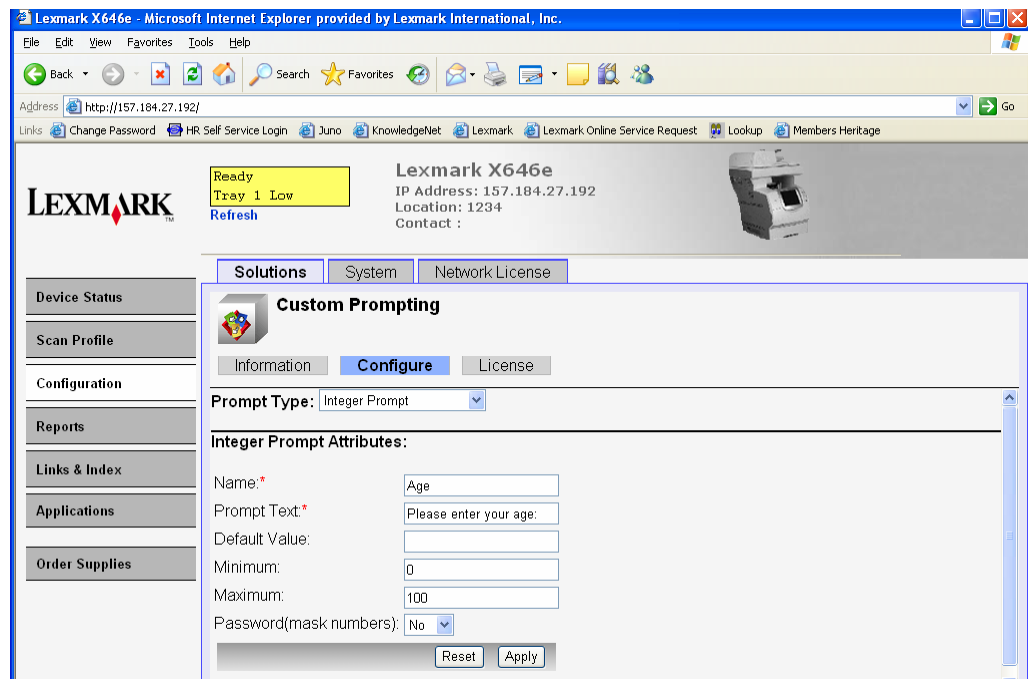
Prompt Text: Please enter your age:

Default Value: <blank>

Minimum: 0

Maximum: 100

Password (mask numbers): No



## b. String Prompt

When a String Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

**Name\*** – This is the name that will be displayed in the configuration screens for the application as well as included as the “tag” in the index file. This will not be visible to the user at the MFP. No spaces are allowed for this field.

**Prompt Text\*** – This is the text that will be displayed on the MFP touch screen that instructions the user what data to enter.

**Default Value** – If desired, a value can be pre-filled in the string prompt. This should only be set if the value is going to be the same for most users.

**Minimum Length** – This will be set to the minimum length of the string allowed to be entered for the data.

**Maximum Length** – This will be set to the maximum length of the string allowed to be entered for the data.

**Password(mask numbers)** – This field indicates that the number being entered is a password. By setting this value to “Yes”, the characters will be masked, or replaced with \*’s, instead of displaying the actual characters entered.

For the example of prompting for city, the following values could be entered as displayed in the screen shot below:

Name: City

Prompt Text: Please enter your city of residence:

Default Value: <blank>

Minimum Length: 2

Maximum Length: 50

Password (mask numbers): No

The screenshot shows a web browser window titled "Lexmark X646e - Microsoft Internet Explorer provided by Lexmark International, Inc.". The address bar shows "http://157.184.27.192/". The page header includes the Lexmark logo, a status indicator "Ready Tray 1 Low", and device information: "Lexmark X646e", "IP Address: 157.184.27.192", "Location: 1234", and "Contact :". The main navigation menu includes "Solutions", "System", and "Network License". The "Custom Prompting" section is active, with sub-tabs for "Information", "Configure", and "License". The "Configure" tab is selected, showing the following fields:

- Prompt Type: String Prompt
- String Prompt Attributes:
  - Name: City
  - Prompt Text: Please enter your city of residence:
  - Default Value: (empty)
  - Minimum Length: 2
  - Maximum Length: 50
  - Password(mask characters): No

Buttons for "Reset" and "Apply" are visible at the bottom of the configuration area.



### c. Single Selection Prompt

When a Single Selection Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

**Name\*** – This is the name that will be displayed in the configuration screens for the application as well as included as the “tag” in the index file. This will not be visible to the user at the MFP. No spaces are allowed for this field.

**Prompt Text\*** – This is the text that will be displayed on the MFP touch screen that instructions the user what data to enter.

**Items\*** – This field contains a list of the individual values to be displayed as selectable in the list prompt. The items will be entered in the order you wish them to display and should be separated by commas.

**Default Item Position (starts at 0)** – This field indicates which value in the list of items above will be selected by default. The positions assume that the first item is position 0, the second item is position 1, etc. By default, the first item is selected if this field is left blank.

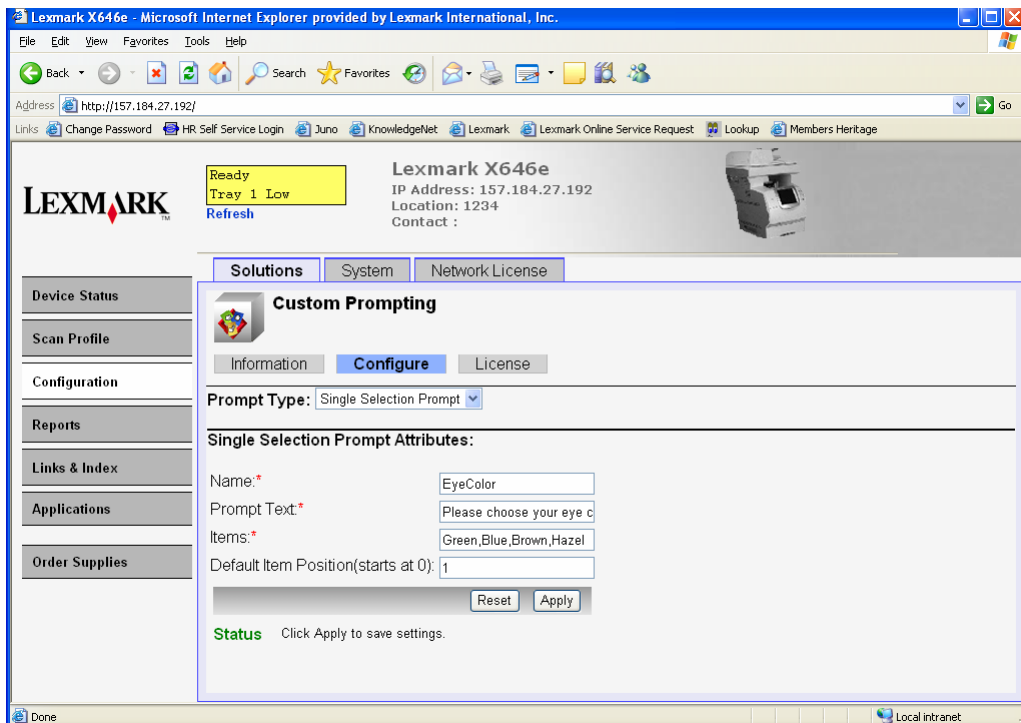
For the example of prompting for eye color, the following values could be entered as displayed in the screen shot below:

Name: EyeColor

Prompt Text: Please select your eye color from the list below:

Items: Green,Blue,Brown,Hazel

Default Item Position (starts at 0): 1 (select Blue as the default)



#### d. Multi Selection Prompt

When a Multi Selection Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

**Name\*** – This is the name that will be displayed in the configuration screens for the application as well as included as the “tag” in the index file. This will not be visible to the user at the MFP. No spaces are allowed for this field.

**Prompt Text\*** – This is the text that will be displayed on the MFP touch screen that instructions the user what data to enter.

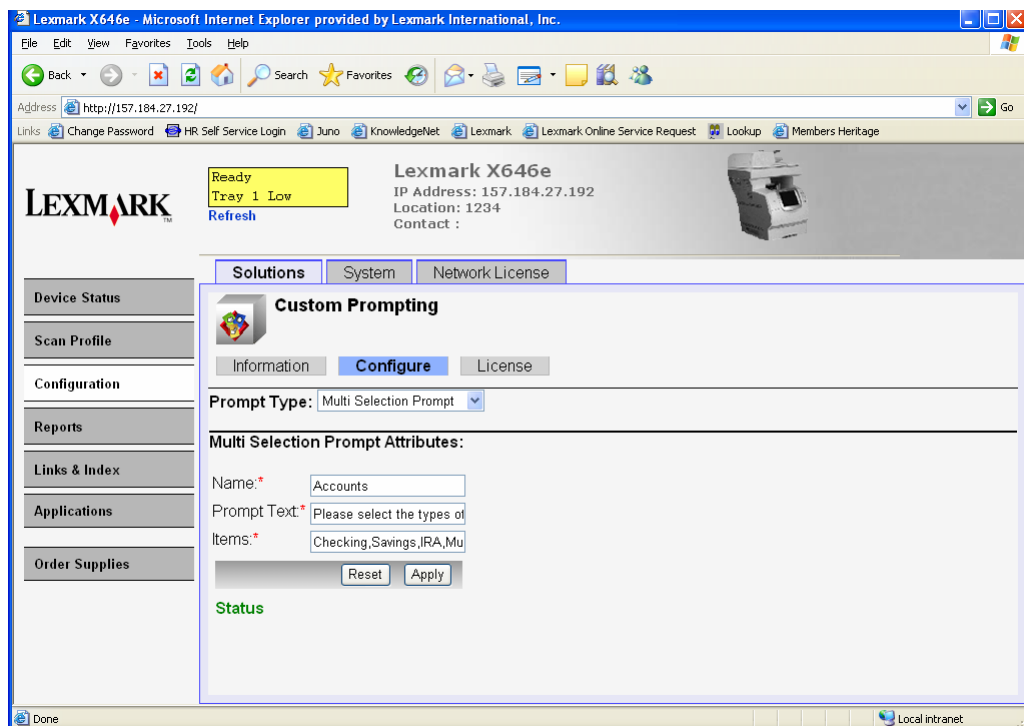
**Items\*** – This field contains a list of the individual values to be displayed as selectable in the list prompt. The items will be entered in the order you wish them to display and should be separated by commas.

For the example of prompting for types of bank accounts, the following values could be entered as displayed in the screen shot below:

Name: Accounts

Prompt Text: Please select the types of bank accounts you have (select all that apply):

Items: Checking,Savings,IRA,Mutual Fund,Money Market



### e. Check Prompt

When a Check Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

**Name\*** – This is the name that will be displayed in the configuration screens for the application as well as included as the “tag” in the index file. This will not be visible to the user at the MFP. No spaces are allowed for this field.

**Prompt Text\*** – This is the text that will be displayed on the MFP touch screen that instructions the user what data to enter.

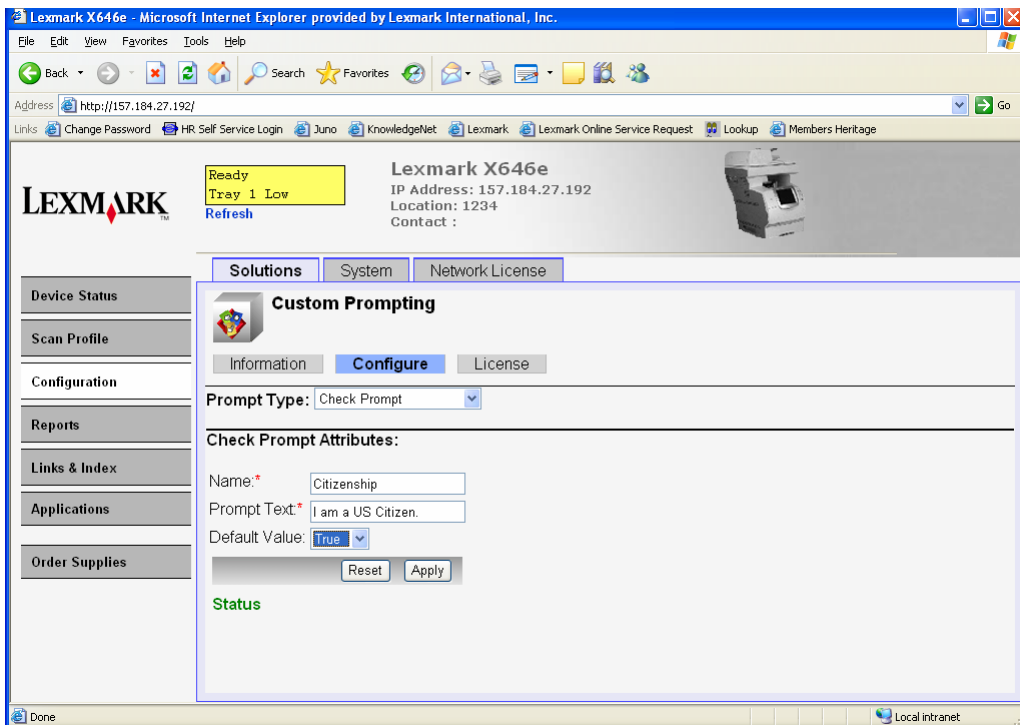
**Default Value** – This field indicates the default value of True or False for the prompt. This should be set to the value that will apply to most users, when possible.

For the example of prompting for US Citizenship, the following values could be entered as displayed in the screen shot below:

Name: Citizenship

Prompt Text: I am a US Citizen.

Default Value: True



## f. Message Prompt

When a Message Prompt is chosen as the Prompt Type, the screen below will be displayed. The options on this screen are:

**Name\*** – This is simply the name that will be displayed in the configuration screens for the application. This will not be visible to the user at the MFP. No spaces are allowed for this field.

**Prompt Label\*** – This is the text that will be displayed as a title for the message on the MFP touch screen.

**Prompt Text\*** – This is the text that will be displayed on the MFP touch screen that instructs the user what data to enter.

**Justification** – This field dictates how the message is positioned on the MFP touch screen. The message can either be aligned along the left or right edges of the screen or can be centered on the screen.

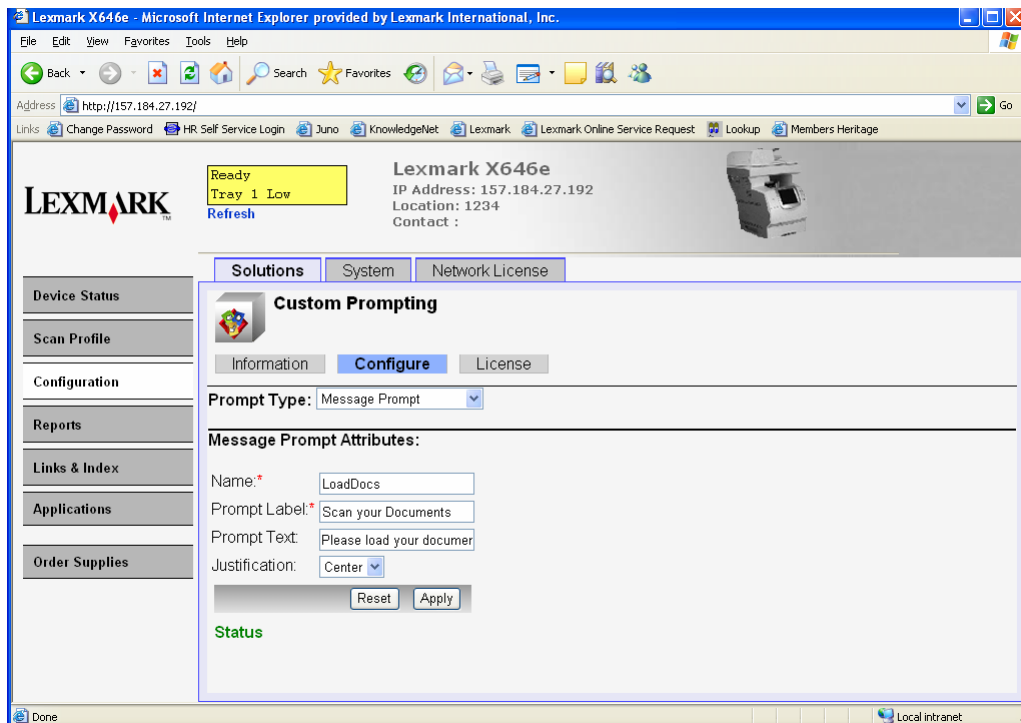
For the example of prompting a user to load their documents, the following values could be entered as displayed in the screen shot below:

Name: LoadDocs

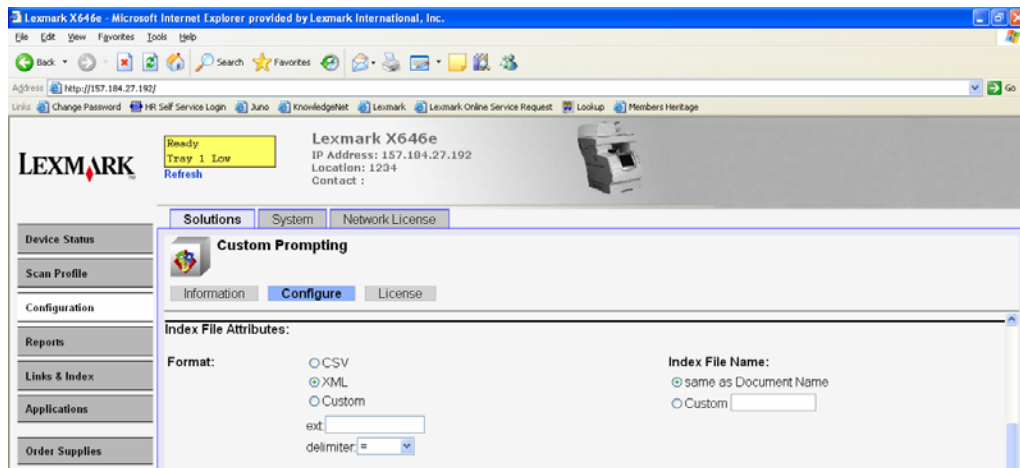
Prompt Label: Scan your Documents

Prompt Text: Please load your documents face-down in the Automatic Document Feeder of the MFP and choose Next to begin scanning.

Justification: Center

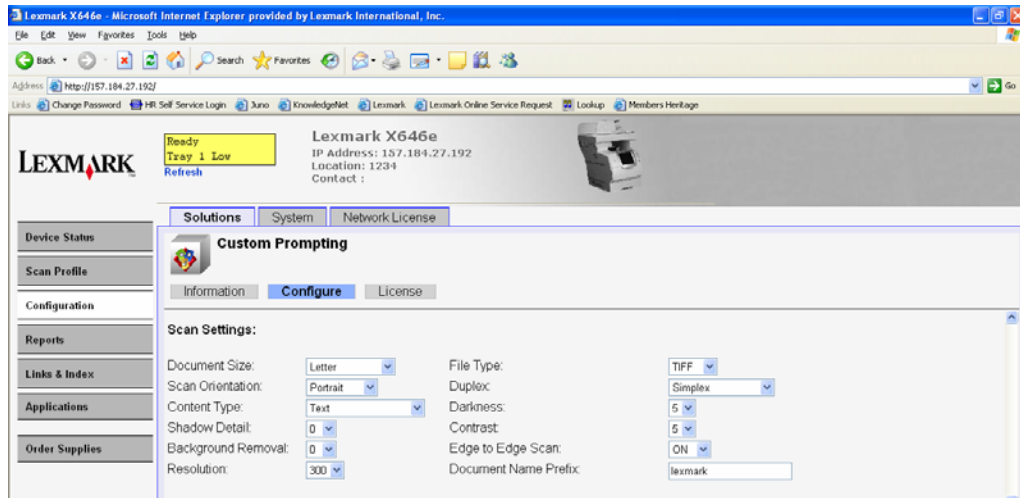


8. Once the prompt information is configured, you can choose Apply to save the settings and be returned to the main configuration screen for the application. The prompt you just created will now be displayed in the Prompts box on the main screen. The application allows for creation of up to five (5) prompts. Repeat steps 3-5 above to create and configure all of the required prompts. The prompts should be added to the application in the order in which they will be displayed to the user.
9. Once the prompts are configured, you will now configure the attributes for the index file to be created containing the data entered for the prompts by the user. On the main configuration screen, these settings are located under the Index File Attributes heading as shown below.



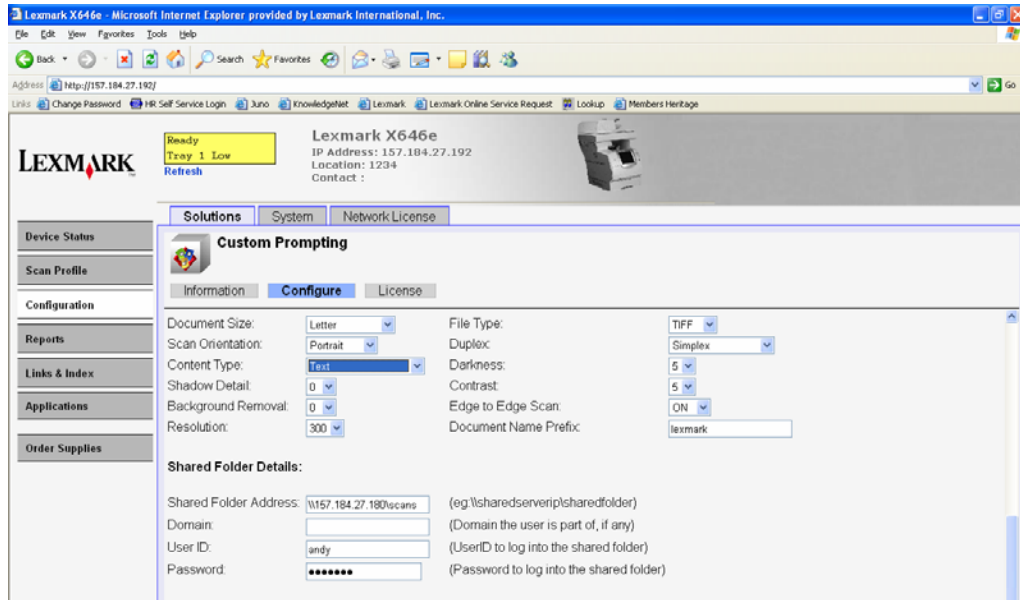
10. You will first configure the format of the index file to be generated. The application supports two standard formats, .csv and .xml, or allows for the definition of a “custom” format. If .csv or .xml formats are chosen, the index files will follow the standard format associated with each. If custom is chosen, you can enter a specific file extension to be used for the index files. Additionally, you can enter choose a delimiter to be used in the index files between the variable name and values. The application allows you to choose from the following options as delimiters: =, |, :, ?, %, \$, #, CRLF, or Space
11. You will now configure the filename for the index file. The filename can be set to match the name of the scanned image file which will be generated based on settings to be discussed below. If a custom file name is desired, you can choose the “Custom” radio button and enter the text portion of that filename in the Custom box. The resultant filename in that case will be the text entered followed by a timestamp to ensure the filenames are unique. The extension will be determined by the format entered in #8 above.

12. Once the index file attributes are configured, you will now configure the scan settings. On the main configuration screen, these settings are located under the Scan Settings heading as shown below.



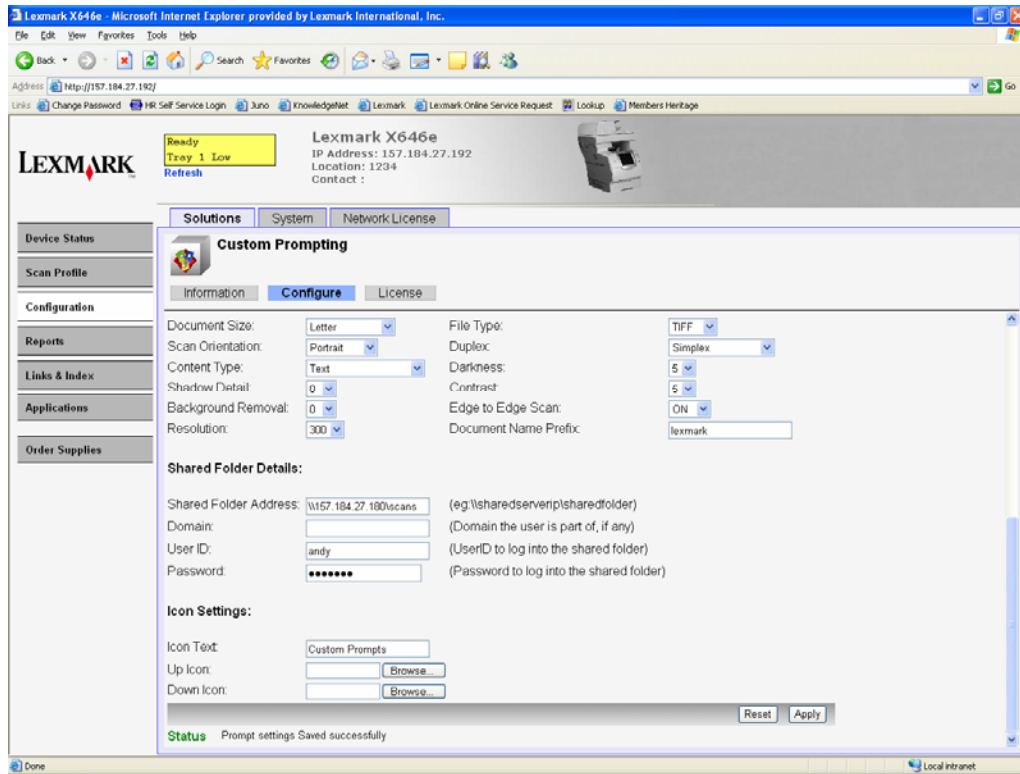
13. Below are descriptions of the options under Scan Settings to assist in determining the appropriate setting. Generally, these settings will be left at their default value unless there is a specific need to change them.
- a. Document Size: This setting determines the size of the pages to be scanned. If both Letter and Legal documents could be scanned, choose the “Mixed” setting from this dropdown.
  - b. Scan Orientation: This setting controls whether the documents to be scanned will be Portrait or Landscape documents.
  - c. Content Type: This setting is set according to the type of data on the scanned pages. The options are text, photos, or a mixture of both.
  - d. Shadow Detail: This setting controls how the MFP will attempt to remove any “shadowing” effects from the scanned image.
  - e. Background Removal: This setting controls how the MFP will attempt to remove an consistent background “clutter” from the scanned image.
  - f. Resolution: This setting will determine the resolution of the scanned image. The lower this setting, the smaller the size of the image files. However, a higher setting will result in a better quality image.
  - g. File Type: This setting will determine the format of the scanned output file. The options supported are two image formats, TIFF or JPEG, or a document format, PDF.
  - h. Duplex: This setting will determine if only the front of pages are scanned (simplex) or both the front and back (duplex). If duplex is chosen, you will also indicate if the pages are duplexed along the short edge or long edge of the document.
  - i. Darkness: This setting controls the darkness at which the documents will be scanned.
  - j. Contrast: This setting controls the contrast at which the documents will be scanned.

- k. Edge to Edge Scan: This setting controls if the image is scanned using the normal margins of the scanner or if the image is scanned to the very edges of the page.
  - l. Document Name Prefix: This field will control the text portion of the filename of the scanned image. This will have a timestamp appended to ensure filenames are unique when saved to the network. Additionally, the file extension will be determined by the File Type chosen in f. above.
14. Once the scan settings are configured, you will now configure the details for the network shared folder to which the scanned documents and index files will be saved. On the main configuration screen, these settings are located under the Shared Folder Details heading as shown below.



15. You will first enter the path to the shared network folder. This will typically be formatted as [\\server\IPaddress\sharedfoldername](#). If DNS is enabled and configured within the TCP/IP settings of the MFP, the host name of the server could also be used in place of the server IP address in the path.
16. You will now enter the user account information to be used when saving the files to the folder. If the user account is part of a particular network domain, that would be entered in the "Domain" field. The User ID and password of the account will be entered in the corresponding fields. This account must have read/write access to the specified shared folder. When entering the password, the characters will be "masked".

- Once the shared folder settings are configured, you will now configure the icon to be used for the application on the MFP Welcome Screen. On the main configuration screen, these settings are located under the Icon Settings heading as shown below.



- You will first enter the Text to be displayed above the icon for this application on the MFP Welcome Screen. The text should be descriptive, but short enough to display nicely on the Welcome Screen.
- You will now configure the icon to be displayed for this application on the MFP Welcome Screen. You will specify a graphic to be used for both the up and down positions of the icon. Choose the “Browse” button to the right of the “Up Icon” field to point to the location of the prompting\_up.gif file that was provided with the application file. Repeat this for the Down icon by pointing to the location of the prompting\_down.gif file.
- The configuration of the application is now complete, choose the “Apply” button to save these settings. You can confirm that application is configured correctly by choosing the newly created icon on the MFP Welcome Screen and verifying the prompts are as you would expect.





# Troubleshooting

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This section describes possible issues that may be encountered when either setting up the application or when executing the application.

Issue	Resolution
I selected the Custom Prompting application on the Welcome Screen of the MFP but I do not receive any prompts.	Verify that the network share path you configured in the application is valid and that the user account you configured has read/write access to that folder.

For issues that cannot be resolved with the information above, please contact 1-800-LEXMARK for additional customer support.



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