



CPA Partner

User's Guide

May 2011

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Contents

Edition notice.....	2
Using the applications.....	5
Using Scan to Practice.....	5
Scanning documents at the printer	5
Using Accounting Forms.....	6
Bookmarking forms.....	6
Configuring folders for bookmarks	7
Printing bookmarks.....	7
Searching for bookmarks and folders	8
Saving bookmarks as shortcuts.....	8
Using Card Copy.....	8
Loading cards on the scanner glass	8
Copying and e-mailing scanned cards.....	10
Using Remote Copy.....	10
Using the copy station	10
Using Background and Idle Screen.....	11
Changing the background image using the printer control panel	11
Notices.....	12
Index.....	19

Using the applications

Lexmark™ *CPA Partner* is a collection of applications used to customize your *multifunction printer* (MFP) for your work environment. Several applications have been installed on the MFP to help make frequently performed tasks faster and more efficient. This allows you to do the following directly from the printer:

- Scan documents at the printer, and then send the scanned documents to a network destination. From the network destination, the documents can be either stored or rerouted.
- Easily access frequently used forms and other regularly printed information.
- Print both sides of a scanned card on a single page, saving paper and displaying the information on the card in a more convenient manner.
- Scan documents at the printer, and then send the scanned documents to another printer on the network.
- Quickly make copies using a one-button custom copy icon on the printer home screen.

Using Scan to Practice

Scanning documents at the printer

- 1 Load the document into the scanner.







Note: Documents may be loaded into the scanner in multiple ways. For information on the different methods of loading documents into the scanner, see the *User's Guide* that came with the printer.

- 2 Touch the application icon. If prompted, enter the user name and password used to access the printer. Contact your system support person for login information.
- 3 Select the destination where you want to receive the scanned document. If prompted, enter the user name and password required to access the destination. Contact your system support person for login information.
- 4 Some additional job options may be available depending on how the application has been configured. Follow the instructions on the screen to update the options. Contact your system support person for more information on each option.
- 5 Touch **Scan It**. Depending on how the application has been configured, you may have the option to preview and make adjustments to scanned pages.
- 6 To scan additional documents, load the next document into the scanner and select one of the following from the confirmation screen:
 - Touch **Yes, to same destination** to scan the document to the previous destination.
 - Touch **Yes, to a different destination** to scan the document to a different destination.
 - Touch **No** to finish the operation and return to the printer Home screen.


Using Accounting Forms

Bookmarking forms

Adding a bookmark using the printer control panel

- 1 From the printer home screen, touch the application icon.
- 2 If necessary, 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.
- 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 touch screen 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 6.

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 home screen of the printer control panel, touch the application icon.
- 2 Touch the name of the bookmark 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 immediately.

- 1 From the home screen of the printer control panel, touch the application icon.
- 2 Touch the name of the bookmark you want to save, and then touch .
- 3 Touch .
- 4 Enter the name for the shortcut as you want it to appear on the printer home screen, 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 .

Note: The 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.

Using Card Copy

Loading cards on the scanner glass

Place the cards facedown on the scanner glass, and then flip them over when prompted by the application.

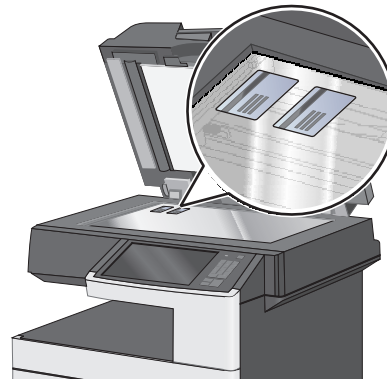
Note: When loading multiple cards, make sure to leave at least 3 cm space between the cards, and at least 1 cm at the edges of the scanner glass to prevent images from being clipped when copying.

For a single card:

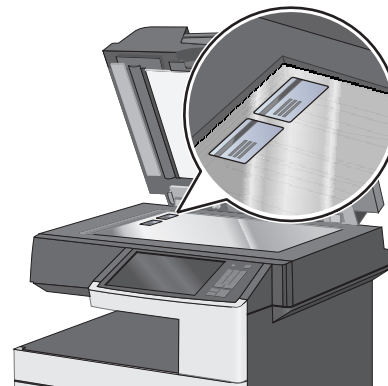


For two cards:

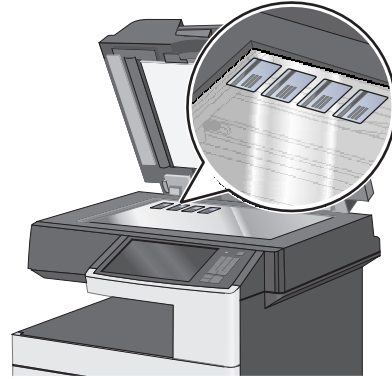
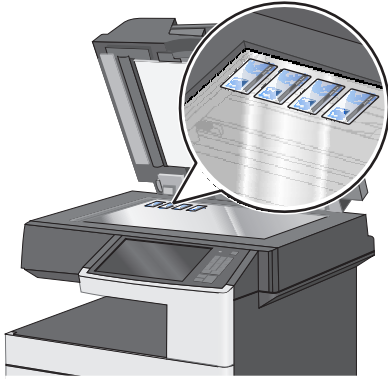
You can load the cards horizontally on the scanner glass.



You can also load the cards vertically on the scanner glass.



For three or more cards:



Note: For printers that support the Embedded Solutions Framework (eSF) 2.0, you can scan only up to four cards at one time.

Copying and e-mailing scanned cards

- 1 From the printer home screen, touch the application icon.
- 2 Load the cards on the scanner glass.
Note: For printers that support eSF 2.0, you can scan only up to four cards at one time.
- 3 Adjust the settings as necessary.
If your printer supports eSF 2.0, then touch **Multi Card** to copy more than one card.
- 4 Touch **Scan**.
- 5 If the printer is configured to send the scanned cards as an e-mail attachment, then set the e-mail destination:
 - a Enter the recipient e-mail address or verify the default e-mail address.
 - b To add additional recipients, touch **Next Address**. You can also select an address from the list to edit it. For more information about entering e-mail addresses, see the printer *User's Guide*.
 - c Touch **E-mail It**.
- 6 When the first scan completes, turn the cards over and then select **Scan**.
- 7 When the second scan completes, remove the cards, and then touch **OK**.
The printer prints a copy of the scanned cards if the application is configured to create a printed output.

Using Remote Copy

Using the copy station

- 1 Load the document into the scanner.
Note: Documents may be loaded into the scanner in multiple ways. For information on the different methods for loading documents into the scanner, see the printer *User's Guide*.
- 2 From the printer home screen, touch the application icon.

- 3 If multiple remote printers have been configured, then select a remote printer to send the scanned documents to.
- 4 Adjust the copy settings as necessary.

Notes:

- For more information on the copy settings, see the printer *User's Guide*.
- Some copy settings may not be supported by the remote printer and will not be available for use with the application. Copy settings that are not supported are grayed out on the printer display.

- 5 Touch **Copy It**.

Using Background and Idle Screen

Changing the background image using the printer control panel

- 1 From the home screen, touch **Change Background**.
- 2 Select the background you want to use, and then touch **OK**.

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EU5-0020

Index

B

- background image
 - changing 11
- bookmarks
 - adding to folder using the printer control panel 7
 - adding using the printer control panel 6
 - creating folders using the printer control panel 7
 - deleting using the printer control panel 6
 - editing using the printer control panel 6
 - printing 7
 - saving as shortcuts 8
 - searching for 8

C

- Card Copy
 - copying cards 10
 - e-mailing scanned cards 10
- cards
 - loading on scanner glass 8
- changing the background image 11
 - using the printer control panel 11
- configuring the application
 - adding bookmarks from the printer control panel 6
 - deleting bookmarks using the printer control panel 6
 - editing bookmarks using the printer control panel 6
- copy station
 - using 10
- copying cards 10

E

- e-mailing scanned cards 10

F

- folder
 - deleting 7
 - editing 7
- folders
 - adding using the printer control panel 7

- searching for 8

L

- loading cards on scanner glass 8

N

- notices 2

P

- printing bookmarks 7

S

- scanning documents at the printer 5
- searching for bookmarks 8
- searching for folders 8
- shortcuts
 - creating 8

U

- using the copy station 10