Lexmark™

Publishing Platform for Retail

Version 10.6

Publishing Solutions User's Guide

July 2022 **www.lexmark.com**

Contents

Change history

July 2022

- Added information on the following:
  - Signage Administrator tool
  - Templates Migration Utility tool
  - New interface of the Print page
  - Troubleshoot dialog for advanced print options

January 2022

- Added information on the following:
  - Changing copies for multiple signs
  - Changing template for multiple signs
  - Setting the start at page position

September 2021

- Added information on user rights and access.

December 2020

- Updated the instructions on the following:
  - Copying a sign
  - Editing a batch
- Added information on the following:
  - Last used printer
  - Default sort columns in all configuration views
  - Paper tray
  - Supported browsers
  - Browser prerequisites
- Added instructions on managing print jobs.

September 2020

- Updated the instructions on the following:
  - Creating a sign
  - Creating a sign within a batch
  - Configuring a sign page
  - Configuring the item library
- Deleted instructions on adding a sign to a batch.

December 2019

- Updated instructions on the following:
  - Editing a sign
  - Creating a sign
  - Creating a sign view

September 2019

- Updated the instructions on the following:
  - Creating a sign
  - Creating a sign within a batch
  - Editing a sign
  - Editing a batch
- Added instructions on the following:
  - Adding a sign to a batch
  - Copying a sign
  - Deleting a sign from a batch
  - Copying a batch
  - Deleting a batch
  - Configuring the Item Library
- Deleted instructions on creating a sign with multiple items.

December 2018

- Initial document release.

Overview

The Publishing Solutions portal is a component of the Lexmark Publishing Platform for Retail (PPR) software. It lets you create, manage, or print signs for your store-labeling requirements.

This document provides instructions on how to configure and use the portal.

Supported browsers

Browser support and prerequisites

Supported browsers

- Microsoft Edge
- Google Chrome™
- Apple Safari—in MacOS only, not Windows
- Mozilla Firefox

Notes:

- This release is not completely optimized for all small-screen or touch-screen devices.
- In non-Windows operating systems, including mobile devices, client-side printing is not supported.

Browser prerequisites

To let the application work properly, cache and local storage must be enabled.

Notes:

- Always set the Mozilla Firefox browser in Remember History mode.
- Some settings do not work in Incognito mode.

Getting started

Switching applications

Publishing Solutions consists of the following applications:

- In-Store Publisher
- Signage Administrator

Note: These instructions apply only to users with access to these applications.

1. From the portal, click  on the upper-right corner of the page.
2. From the list, select **In-Store Publisher** or **Signage Administrator**.

Notes:

- For both the applications, the user logs in as an In-Store user.
- When the user selects a particular application, the portal directs to the landing page of that application.

In-Store Publisher

Signs

Creating a sign

The following instructions are for creating a sign in a new batch. To create a sign in an existing batch, see "Creating a sign within a batch" on page 9.

Notes:

- Users must have the rights to create a sign within a batch.
- Some users do not have the rights to create signs in specific batches, although they can create signs in general.
- Not all users have access to the default batch source.

From the Item Library

Make sure that your items are added in the Item Library.

1. From the home page, click **Create Signs From Library**.
2. Type a unique batch name, and then click **Create Batch**.

   Note: Click **More Information** to modify other settings of the batch.

3. Click , and then select a template.

   Notes:

   - The selected template is applied to the new items in the batch.
   - To edit the template for each sign, see "Editing a sign" on page 11.

   Note: In some cases, the administrator may have configured the signs so that those are created after collecting the actual data from the source. In this case, a `Signs will be created with external item information` message appears, and the populated data can differ from data on the item library.

4. Select one or more items, and then click **Add to Batch**.

From a template

1. From the home page, click **Create Signs From Template (Ad Hoc)**.
2. Type a unique batch name, and then click **Create Batch**.

   Note: Click **More Information** to modify other settings of the batch.

3. From the Current Template section, click , and then select a template.

   For a single-item template

   a. Select a single-item template, and then click **Change Template**.

   b. In the Product Information field, type the item information.

For a multiple-item template

a. Select a multiple-item template, and then click **Change Template**.
b. Provide the header name, header description, and number of copies.
c. From the Product Information section, do one or more of the following:
    - Click **Add from Item Library**, and then select one or more items.
    - Click **Add Manually**, and then provide the item information.

4. Click **Save Sign**.

From a planogram

This feature is available only if it is enabled in the In-Store Publisher configuration settings from Platform Administrator.

1. From the home page, click **Create Signs from Planogram**.
2. Type a unique batch name, and then click **Create Batch**.

    Note: To change other settings of the batch, click **More Information**.

3. Click , and then select a template.

    Notes:

    - The selected template is applied to the new items in the batch.
    - If Auto Assign Template is selected, then signs are created with this template or according to the default rule set by the system administrator.
    - If any other template is selected, then signs are created with this template or according to the rule set by the system administrator.
    - To edit the template for each sign, see “Editing a sign” on page 11.

4. Select a planogram, and then click **Add to Batch**.

    Notes:

    - You can select only one planogram at a time while adding to a batch.
    - You can view the items present in a planogram by clicking the link in the Plano Code column.

Creating a sign within a batch

Notes:

- Users must have the rights to create a sign within a batch.
- Some users do not have the rights to create signs in specific batches, although they can create signs in general.
- Not all users have access to the default batch source.

From the Item Library

Make sure that your items are added in the Item Library.

1. From the Batches page, click a batch name.
2. Click **Add Signs** > **Using item library**.

3 Click , and then select a template.

Notes:

- The selected template is applied to the new items.
- To edit the template for each sign, see “Editing a sign” on page 11.

Note: In some cases, the administrator may have configured the signs so that those are created after collecting the actual data from the source. In this case, a `Signs will be created with external item information` message appears, and the populated data can differ from data on the UI.

4 Select one or more items, and then click **Add to Batch**.

From a template

1 From the Batches page, click a batch name.

2 Click **Add Signs** > **By Manual Entry**.

3 Click , and then select a template.

For a single-item template

a Select a single-item template, and then click **Change Template**.

b In the Product Information field, type the item information.

For a multiple-item template

a Select a multiple-item template, and then click **Change Template**.

b Provide the header name, header description, and number of copies.

c From the Product Information section, do one or more of the following:

- Click **Add from Item Library**, and then select one or more items.
- Click **Add Manually**, and then provide the item information.

4 Click **Save Sign**.

From a planogram

This feature is available only if it is enabled in the In-Store Publisher configuration settings from Platform Administrator.

1 From the Batches page, click a batch name.

2 Click **Add Signs** > **Using Planogram**.

3 Click , and then select a template.

Notes:

- The selected template is applied to the new items in the batch.
- If Auto Assign Template is selected, then signs are created with this template or according to the default rule set by the system administrator.
- If any other template is selected, then signs are created with this template or according to the rule set by the system administrator.

- To edit the template for each sign, see “Editing a sign” on page 11.

4 Select a planogram, and then click **Add to Batch**.

Notes:

- You can select only one planogram at a time while adding to batch.
- You can view the items present in a planogram by clicking the link in the Plano Code column.

Editing a sign

Notes:

- Users must have the rights to edit a sign within a batch.
- Some users do not have access to edit signs in some specific batches, though they can have access to edit signs in general.
- Not all users have access to the default batch source.

1 From the Batches page, click the batch name.

2 Click the product name, and then configure the sign information.

Note: To edit the template, click , and then select a template.

3 Click **Save Sign**.

Editing multiple signs

Users can edit templates and copies of multiple signs.

Editing templates

1 From the Batches page, click the batch name.

2 Select one or more signs, and then click **Change Template** .

3 To change a template, select a new template, and then click **Change Template**.

Changing copies

1 From the Batches page, click the batch name.

2 Select one or more signs, and then click **Change Copies** .

3 To change the copies, enter or select the number of copies, and then click **Save**

Editing a batch

Notes:

- Users must have the rights to edit a batch.
- Some users do not have access to edit some specific batches, although they have access to edit batches in general.
- Not all users have access to the default batch source.

1 From the Sign View page, click beside the batch title.

2 Configure the batch information, and then click **Update**.

Printing a sign

Notes:

- Users must have the rights to edit a sign within a batch.
- Some users do not have access to edit signs in some specific batches, although they have access to edit signs in general.
- Not all users have access to the default batch source.

1 From the Batches page, click the batch name.

2 Select one or more signs, and then click **Print**.

3 If necessary, change the print settings.

4 Click **Print**.

For more information on printing, see “Print jobs” on page 15.

Copying a sign

Notes:

- Users must have the rights to copy a sign.
- Some users do not have the rights to copy signs to specific batches, although they can copy signs in general.
- Not all users have access to the default batch source.
- Restricted batches do not appear in the option list.

1 From the Batches page, click the batch name.

2 Select one or more product names, and then click **Copy**.

3 Copy the sign to the same batch, a different batch, or a new batch.

4 Click **Yes** to confirm.

5 Go to the target batch where the sign items are copied.

Deleting a sign from a batch

Note: Users must have the required access to delete a sign.

1. From the Batches page, click a batch name.
2. Select one or more product names, and then click **Delete** > **OK**.

Updating the library

- Users must have the required access to update the library. The associated profile property is LibraryPermissions.
- If the value of the profile property UpdateLibraryOnSignSave is set to **TRUE**, then users can see either of the following:
  - **Update Library** button is not visible.
  - The library is updated automatically every time a user saves a sign.

For an existing item (Item is a corporate data)

1. Open the sign edit page.
2. Edit the attributes, such as the name, template, sale price, and regular price, and then save the sign.
3. Click **Update Library**.

   Note: You can verify the modified attributes in the item library page.

For a new item (Item is a store level or local data)

1. Open the sign edit page.
2. Edit the attributes, such as the name, template, sale price, and regular price, and then save the sign.
3. Click **Update Library**.
4. Click **Add** in the confirmation box.
5. Type the details of the attributes, and then click **OK**.

Batches

A batch is a group of signs or labels that you can print all at once. For example, if you want to print the signs for a store sale, then create the signs in one batch. Sending the batch to the printer prints all the signs in it.

Creating a batch

1. From the Batches page, click **Create Batch**.
2. Provide the batch information, and then click **Create**.

Editing a batch

Notes:

- Users must have the rights to edit a batch.
- Some users do not have access to edit some specific batches, although they have access to edit batches in general.
- Not all users have access to the default batch source.

1. From the Batches page, select a batch, and then click **Edit**.
2. Configure the batch information, and then click **Update**.

Printing a batch

1. From the Batches page, select one or more batches, and then click **Print**.
2. If necessary, change the print settings.
3. Click **Print**.

For more information on printing, see “Print jobs” on page 15.

Printing a manifest

You can print a sign manifest from the Batch View page for one batch at a time.

1. Select a batch from the Batch View page, and then and click **Print Manifest**.
2. If necessary, change the print settings.

   Note: You can preview the manifest before proceeding to print.
3. Click **Print**.

For more information on printing, see “Print jobs” on page 15.

Copying a batch

Notes:

- Users must have the rights to copy a batch.
- Not all users have access to the default batch source.
- Restricted batches do not appear in the option list.

1. From the Batches page, select one or more batches.
2. Click **Copy**.

Deleting a batch

Note: User must have the required access to delete a batch.

1. From the Batches page, select one or more batches, and then click **Delete**.
2. In the Delete Batches dialog box, click **OK**.

Print jobs

The print job window lets you print batches or signs for the store labeling requirements. Try any of the following:

- Select print jobs from the right pane.

  Notes:

  – A job contains one or multiple templates.
  – When the print job is successful, the next print job is selected automatically.
- Change the print settings from the left pane.

Previewing a print job

You can confirm the following information before printing:

- Template type
- Page layout
- Total number of pages

Selecting a printer

The Print Jobs window shows the last used printer in the client machine for the logged-in user, as a preselected printer. If no last-used printer information is available, then the application shows the Windows default printer as a preselected printer.

Try one of the following:

- Select the preselected printer.
- Click **Change Printer** to select another printer.

Note: If the Print Control Service is not installed and no last-used-printer information is available, then the server default printer (if any) is automatically selected.

Selecting a tray

Tray information is automatically selected based on the configuration and availability.

Server-side printing

- The tray option is visible only if the corresponding paper is associated with a tray.

  Note: The tray is shown as a label (non-editable).
- If the tray is not configured, then the Paper Tray setting does not appear.

Client-side printing

- The tray option is preselected if the corresponding paper is associated with a tray and the tray is available for the selected printer.
- If the tray is not configured, then the first tray in the local print queue list appears as preselected.

Note: You can change the tray option manually.

Setting a start at print position

- If printing multi-up paper, you can set a position on the paper to start printing, instead of the default first place.
- You can preview the new print start position before proceeding to print.

Other print settings

You can select the following settings

- Select the **Print as 1UP** check box to print multiple pages onto a single paper.
- Select the check box to include any background image from the template.

Printing selected jobs

This setting must be configured and managed only through Platform Administrator.

Note: You can select an individual template instead of all templates under the selected paper.

Troubleshooting

Note: This option is available only to **Troubleshooter** type users.

Users can configure the following settings:

- Print API, print method, printer model, and print graphics method
- Print target where the server printer is selected
- Local graphics, log level, and cache location for the local printer

Notes:

- The saved changes are applied in subsequent print jobs.
- To reset the settings, click **Reset to Default**.

Changing a store

1. From the portal, click on the upper-right corner of the page.
2. Click **Change Store**.
3. Select a store, and then click **Change Store**.

Notes:

- User must have the required permission to access more than one store.
- User can select a different store without logging out from the portal.

Changing the language

1. From the portal, click  on the upper-right corner of the page.
2. Click **Change Language**.
3. Select a language, and then click **Change Language**.

Signage Administrator

Configuration

Note: These instructions are available only for users with administrator access.

Configuring the home screen

1. From the navigation bar, click the **UI Configuration** tab.
2. Click **Home Screen** in the left pane.
3. From the Available Tiles section, configure the Dashboard tiles to be displayed in the Home Screen. Do either of the following:
   - To move a tile, click a tile, and then click either > or <.
   - To rearrange the tiles, click a tile, and then click either ^ or ˅.
4. From the Tile Column section, increase or decrease the number of columns.

   Note: The maximum number of tile columns is five.
5. Click **Save Changes**.

Configuring a batch page

1. From the navigation bar, click the **UI Configuration** tab.
2. In the Batch View menu, click **Page**.
3. From the Action Buttons section, configure the actions to use for the batch table. Do either of the following:
   - To move an action, click the action, and then click either > or <.
   - To rearrange the enabled actions, click an action, and then click either ^ or ˅.

     Note: The actions on the right side of the Available Items field are enabled.
4. From the Table Columns section, configure the columns.

   Notes:

   - To add a column, click **Add Columns**, and then select a column.
   - To delete a column, click ✖ beside the column name.
   - To include the column information in the search index, enable **Searchable**.
5. From the Default Rows Per Page section, set the number of rows to show for each batch page.
6. From the Batch Print Status Mapper section, configure the display value for each batch status.

   Notes:

   - To add a value mapper, click **Add**.

- To delete a value mapper, click .

7 Click **Save Changes**.

Configuring a batch view

Creating a batch view

1 From the navigation bar, click the **UI Configuration** tab.

2 In the Batch View menu, click **Views** > **Create**.

3 From the General section, type a unique name and description.

4 If necessary, add one or more queries.

5 From the Table Columns section, select the columns to use for the batch table. Do one or more of the following:

- To enable a column, click the column name in the Available Items field, and then click .
- To rearrange the enabled columns, click a column name, and then click either or .

  Note: The column names on the right side of the Available Items field are enabled.
- To allow user updates, select **In-line Editable**.
- To show more information for items on the column, select **Hyperlink**.

6 If necessary, add filters and facets. Do one or more of the following:

Note: Filters and facets are batch filters that appear on the left side of the batch view columns.

- To enable a filter, click the filter name in the Available Items field, and then click .
- To rearrange the enabled filters, click a filter name, and then click either or .

  Notes:
  - The filter names on the right side of the Available Items field are enabled.
  - Click next to the filter name to edit the filter.

7 From the Default Sort Order section, select a batch attribute in the ascending/descending order.

8 Click **Create Batch View**.

Editing a batch view

1 From the navigation bar, click the **UI Configuration** tab.

2 In the Batch View menu, click **Views**.

3 Click a batch view.

4 Configure the batch view settings.

5 Click **Save Batch View**.

Setting a default batch view

1. From the navigation bar, click the **UI Configuration** tab.
2. In the Batch View menu, click **Views**.
3. Select a batch view, and then click **Set as Default**.

Deleting a batch view

1. From the navigation bar, select the **UI Configuration** tab.
2. In the Batch View menu, click **Views**.
3. Select a batch view, and then click **Delete** > **OK**.

   Note: You cannot delete a system-provided batch view.

Configuring a sign page

1. From the navigation bar, click the **UI Configuration** tab.
2. In the Sign View menu, click **Page**.
3. From the Toolbar Buttons section, configure the actions to use for the sign table. Do either of the following:
   - To move an action, click the action, and then click either or .
   - To rearrange the enabled actions, click an action, and then click either or .

     Note: The actions on the right side of the Available Items field are enabled.
4. From the Table Columns section, configure the columns.

   Notes:

   - To add a column, click **Add Columns**, and then select a column.
   - To delete a column, click beside the column name.
   - To include the column information in the search index, enable **Searchable**.
5. From the Default Rows Per Page section, set the number of rows that you want to appear for each sign page.
6. From the Advanced Search Attributes section, configure the attributes that you want to appear in the advanced search. Do either of the following:
   - To move an attribute, click the column name, and then click either or .
   - To rearrange the enabled attributes, click an attribute name, and then click either or .

     Notes:

     – The attribute names on the right side of the Available Items field are enabled.
     – We recommend selecting only up to 10 attributes.
7. From the Sign Print Status Mapper section, configure the display value for each batch status.

Notes:

- To add a value mapper, click **Add**.
- To delete a value mapper, click ✖.

8 Click **Save Changes**.

Configuring a sign view

Creating a sign view

1 From the navigation bar, click the **UI Configuration** tab.

2 In the Sign View menu, click **Views** > **Create**.

3 From the General section, provide a unique name and description.

4 From the Layout section, select the columns to show for the sign table. Do one or more of the following:

- To enable a column, click the column name in the Available Items field, and then click >.
- To rearrange the enabled columns, click a column name, and then click either ^ or ˅.

  Note: The column names on the right side of the Available Items field are enabled.
- To allow user updates, enable **In-line Editable**.
- To show more information for the items on the column, enable **Hyperlink**.

5 If necessary, add filters and facets. Do one or more of the following:

Note: Filters and facets are sign filters that appear on the left side of the batch view columns.

- To enable a filter, click the filter name in the Available Items field, and then click >.
- To rearrange the enabled filters, click a filter name, and then click either ^ or ˅.

  Note: The filter names on the right side of the Available Items field are enabled.

6 Click ✎ next to the filter name to edit the filter.

7 From the Rules section, add conditions or group rules.

8 From the Default Sort Order section, select a sign attribute in the ascending/descending order.

9 Click **Create Sign View**.

Editing a sign view

1 From the navigation bar, click the **UI Configuration** tab.

2 In the Sign View menu, click **Views**.

3 Click a sign view, and then configure the settings.

4 Click **Save Sign View**.

Deleting a sign view

1. From the navigation bar, click the **UI Configuration** tab.
2. In the Sign View menu, click **Views**.
3. Select a sign view, and then click **Delete** > **OK**.

   Note: You cannot delete the default sign view.

Configuring the item library

1. From the navigation bar, click the **UI Configuration** tab.
2. Click **Item Library** > **Choose Fields**.
   - a. In the Add Columns dialog box, select the column names to use on the Item Library table, and then click **Add Columns**.
   - b. Configure the selected columns. Do one or more of the following:
     - Set the column data type.
     - To include the column information in the search index, enable **Searchable**.
     - To delete a column, click ✖ beside the column name.
3. From the Advanced Search Attributes section, configure the attributes that you want to appear in the advanced search. Do either of the following:
   - To move an attribute, click the column name, and then click either > or <.
   - To rearrange the enabled attributes, click an attribute name, and then click either ^ or ˅.

     Notes:

     – The attribute names on the right side of the Available Items field are enabled.
     – We recommend selecting only up to 10 attributes.
4. From the Table Columns section, configure the columns that you want to appear. Do one or more of the following:
   - To move a column, click the column name, and then click either > or <.
   - To rearrange the enabled columns, click a column name, and then click either ^ or ˅.

     Note: The column names on the right side of the Available Items field are enabled.
5. From the Default Rows Per Page section, set the number of rows that you want to appear when viewing the Item Library.
6. If necessary, add filters and facets. Do one or more of the following:

   Note: Filters and facets are item filters that appear on the left side of the Item Library page.

   - To enable a filter, click the filter name in the Available Items field, and then click >.
   - To rearrange the enabled filters, click a filter name, and then click either ^ or ˅.

     Note: The filter names on the right side of the Available Items field are enabled.

7 From the Default Sort Order section, select an item attribute in the ascending/descending order.

8 Click **Save Changes**.

Configuring custom localization

Updating the localization file

1 From the navigation bar, click the **UI Configuration** tab.

2 Click **Localization** > **Download CSV File** > **Factory Default**.

3 Select a language, and then click **Download**.

4 From your computer, open the CSV file.

5 In the Value column, replace the strings with their translations, and then save the document.

Uploading the localization file

1 From the navigation bar, click the **UI Configuration** tab.

2 Click **Localization** > **Upload**.

3 Select a language, and then browse to the updated CSV file.

4 Click **Upload**.

Managing templates

Note: These instructions apply only to users with signage administrator access.

Exporting templates

Notes:

- Users must have access to export templates.
- The template page is searchable by template name and description.
- The template page is paginated and sortable.
- Users must select at least one template to enable the **Export** button.

1 Select template(s).

2 Click **Export**.

   Notes:

   - When exporting a single template, a PTF (Portable Template Format) file is downloaded as `<Template Name>.ptf`.
   - When exporting multiple templates, a Zip file is downloaded, which contains a PTF file for each selected template.

Importing templates

Note: Users must have access to import a template.

1. From the top navigation bar, click the **Templates** tab.
2. Click **Import**.
3. Select one or more valid PTF or ZIP files.

   Notes:

   - Valid templates data is extracted and is redirected to the **Review Template Changes** page.
   - The **Review Template Changes** page shows information such as template name, description, source file, export time, and status.
   - If the review list contains any duplicate template, then importing is not allowed. The Apply button remains disabled.
   - Users can remove a duplicate template by clicking .
4. Click **Apply**.
5. Review the final changes, and then click **Yes**.
6. Click **Done** to go back to the template view.

Using Template Migration Utility

Template Migration Utility is a desktop application that helps users to export templates.

It consists of two pages:

- Configuration page
- Template page

Do one or more of the following:

- In the Configuration page, enable the **Connect** button by providing the user ID, password, and data source.

  The Connect button is disabled by default.
- If the database connection is established successfully, then access the Template page.

Exporting a template

1. Select template(s) from the list.
2. Click **Export**, and then select a folder to export the template(s).
3. Click **OK**.

Searching a template

1. Type the keyword in the search box, and then click **Enter**.
2. To go back to the original list of templates, clear the search box, and then click **Enter**.
3. Click **OK**.

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July 2022

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Index