



Lexmark™

Scan to SharePoint Online

Version 2.0

Administrator's Guide

December 2020

www.lexmark.com

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Change history

December 2020

- Added information about the Azure AD permissions and consent requirements.
- Deleted information about configuring the Azure Active Directory.
- Deleted information about the app client ID.

March 2020

- Added information about the output format for the Optical Character Recognition feature.
- Added information about license removal.

April 2019

- Updated information on registering SharePoint Online to Azure Active Directory.

October 2018

- Initial document release for multifunction products with a tablet-like touch-screen display.

Overview

Use the application to scan documents securely from the printer to sites housed on Microsoft SharePoint Online servers. You can also do the following:

- Navigate to SharePoint Online–based web sites.
- Create folders.
- Print documents.

This document provides information on how to configure, use, and troubleshoot the application.

Deployment readiness checklist

Make sure that:

- You have a SharePoint Online server.
- You have the SharePoint URL (URL of the site collection).

- You have the following information if your network is configured with a proxy server to access the Internet:
 - Proxy host name

 - Proxy port number

Configuring the SharePoint server settings

Configuring columns

SharePoint allows you to add property columns to your document libraries. These columns contain information about the files saved in the SharePoint server. Before scanning, the application prompts users to add property values to the scanned document.

- 1 Open a web browser, and then type the SharePoint URL.
- 2 Log in using an administrator account.
- 3 Select a document library, and then click the **Library** tab.
- 4 Click **Create Column**.
- 5 From the Create Column dialog box, configure the column.

The application supports only the following column types:

- Single line of text
- Multiple lines of text
- Choice
- Number
- Currency
- Date and Time
- Yes/No
- Person or Group
- Hyperlink or Picture

Notes:

- Column names created using Quick Edit may not match the column names in the file information shown by the application.
- For the Number column type, selecting **Show as percentage** converts the value to a decimal in the application. For example, if the value in the SharePoint server is 50%, then the application shows the value in the file information as 0.50.

- 6 Click **OK**.

Azure AD Permissions and Consent Requirements

Scan to SharePoint Online requires user consent to the following API permissions:

API	Permission	Type	Description
SharePoint	AllSites.Write	Delegated	Read and write items in all site collections
Microsoft Graph	User.Read	Delegated	Sign in and read user profile

Note: These permissions do not require administrator consent. When required permissions are granted, the application can read and write access reviews on behalf of the signed-in user.

Granting administrator consent

Depending on the preconfigured Azure AD settings, non-administrator users can be restricted from consenting to the application to access company data on their behalf. In such scenarios, the applications must be granted an administrator consent to access the organizational data.

To grant administrator consent, user can try one or more of the following:

From the consent prompt

An admin user can consider enabling the administrator consent directly from the consent prompt, when signing in to the application.

From the Azure portal

After signing in, you can grant administrator consent through the Enterprise applications, if the application has already been added in the Azure Active Directory.

Configuring the application

Accessing the Embedded Web Server

- 1 Obtain the printer IP address. Do either of the following:
 - Locate the IP address on the printer home screen.
 - View the IP address in the Network Overview section or in the TCP/IP section of the Network/Ports menu.
- 2 Open a web browser, and then type the printer IP address.

Accessing the configuration page for the application

- 1 From the Embedded Web Server, depending on your printer model, do one of the following:
 - Click **Apps**.
 - Click **Settings > Apps > Apps Management**.
 - Click **Settings > Device Solutions > Solutions (eSF)**.
 - Click **Configuration > Embedded Solutions**.
- 2 Click the application name, and then click **Configure**.

Configuring the application settings

- 1 From the Embedded Web Server, navigate to the configuration page for the application.
- 2 Do any of the following:

Note: For more information on each setting, see the mouse-over help.

Customize the application icon

From the Home Screen section, specify the text and image that appear on your home screen.

Configure SharePoint settings

- a From the SharePoint Settings section, type the SharePoint URL.

Note: Exclude the default page of the site, document libraries, or folders. For example, to add **http://SharePointURL/Docs/default.aspx**, type only **http://SharePointURL/Docs**.

- b Type the URL scheme for My Site.

Use **%s** for the SharePoint URL and **%u** for the user ID variable. For example, if the My Site URL is **http://SharePointURL/personal/user1**, where:

- **http://SharePointURL** is the SharePoint URL
- **personal** is the path name
- **user1** is the user ID

then the scheme is **%s/personal/%u**.

Note: If you are using SharePoint Online, then type the exact My Site URL. For example, **https://company1-my.sharepoint.com/personal/user1_onmicrosoft_com**. You cannot use the variable "%s" because the SharePoint URL is modified when used as a My Site URL. For example, if your SharePoint URL is **https://company1.sharepoint.com**, then it is modified as **https://company1-my.sharepoint.com**.

- c** In the Filtered Locations field, type the names of the document libraries that you want to hide on the printer display, separated by commas.

Note: The list of document libraries is shown on the left side of the printer display.

- d** In the Default Start Location field, type the name of the document library that you want to appear by default when you launch the application.

Notes:

- You can also use the sites listed on the left side of the printer display as the default start location.
 - The specified default start location must not be a filtered location.
 - If a subsite and a document library have the same name, then the application uses the subsite as the default start location.
 - Subsite names are case-sensitive. Make sure to type the subsite name with the correct capitalization. For example, if the subsite name is ABC, then type **ABC** in uppercase.
- e** If you want users to type a check-in comment when uploading scanned documents, then select **Require Check-in Comments**.
- f** In the Prompt for optional data menu, select the column that you want to prompt to the users.
- g** If necessary, configure the time stamp settings.
- h** In the Personal Site Use menu, select how personal sites are used by the application.
- **Include Personal Sites**—Users can access their personal site and the shared document libraries.
 - **Only Allow Personal Sites**—Users can see only their personal site.
 - **Not Using Personal Sites**—The My Site button is unavailable, and users can see only the shared document libraries.
- i** Enable printing and scanning.

Configure scan settings

From the Scan Settings section, configure the settings.

Notes:

- A printer hard disk is required to use the custom job and the scan preview features.
- Select **Enable Custom Job** to prompt users to scan from the automatic document feeder (ADF) or on the scanner glass.
- When scanning documents that contain more than one page, select either **TIFF** or **PDF** as the file format.

Configure confirmation options

From the Confirmation Page section, select how you want to confirm the job.

- 3** Click **Apply**.

Configuring proxy settings

Provide the proxy settings when your SharePoint server is outside your network.

- 1 From the Embedded Web Server, access the configuration page for the application.
- 2 From the Proxy Settings section, type the proxy host name and port number.
Note: For more information, see the mouse-over help.
- 3 Click **Apply**.

Importing or exporting a configuration file

Importing configuration files overwrites the existing application configurations.

- 1 From the Embedded Web Server, access the configuration page for the application.
- 2 Do either of the following:

For eSF version 5.0 or later

- a Click **Import/Export Configuration**.
- b Do either of the following:
 - Browse to the configuration file, and then click **Import**.
 - Click **Export**.
- c Click **Save**.

For eSF version 4.0 or earlier

- a Do either of the following:
 - Click **Import**, browse to the configuration file, and then click **Start**.
 - Click **Export**.
- b Click **Apply**.

Using the application

After the application is installed, SharePoint users can use additional scan features on the printer when scanning to a SharePoint server.

Prompts may vary depending on the profile set by the administrator.

Accessing the SharePoint Online server

Access as a first-time guest user

- 1 From the printer home screen, touch the application icon.
- 2 Touch **Create a Profile** on the printer display.
- 3 Type a profile name. You can also secure your profile by entering a 4-digit PIN.
Note: We recommend using only alphanumeric characters.
- 4 Follow the instructions on the printer display.

Access as a returning guest user

- 1 From the printer home screen, touch the application icon.
- 2 Select a profile from the list of SharePoint Online profiles.
- 3 If the profile is secured, then enter the 4-digit PIN.



Access as a first-time authenticated user

- 1 From the printer home screen, touch the application icon.
- 2 Log in either by using internal box security or by network authentication methods such as LDAP or Badge Authentication.
- 3 Follow the instructions on the printer display.

Access as a returning authenticated user

- 1 From the printer home screen, touch the application icon.
- 2 Log in either by using internal box security or by network authentication methods such as LDAP or Badge Authentication.

Notes:

- The authentication code is valid only for 15 minutes.
- The authentication code can be used only once.
- Up to 50 guest profiles can be created.
- To delete a profile, select a profile and then touch  or touch  > **Delete**.
- Authenticated users must reauthenticate when their account passwords are changed.
- If a user has not logged in within 90 days, then the user is forced to reauthenticate on the next login.

Scanning documents

Notes:

- Before you begin, enable scanning in the Embedded Web Server.
- The timeout settings in your printer and in the SharePoint server may affect the uploading of the scanned document. If you are scanning multiple pages, then make sure to increase the timeout settings in your printer and in the SharePoint server.

1 Load an original document into the ADF tray or on the scanner glass.


Note: For more information, see the printer *User's Guide*.

2 From the home screen, touch the application profile icon.

3 If prompted, enter your credentials.

4 Navigate to the document library or folder where you want to save the scanned document.

Notes:

- To add a folder, touch  beside the Scan button, and then touch **Create Folder**. The following characters cannot be used for folder names: ~ " # % & * : < > ? / \ { | }
- You can create folders only inside a document library.

5 Touch **Scan**.

6 Type the information about the scanned document.

Note: If **Show as percentage** is selected in the SharePoint server, then the value that you enter in the Number field is converted to a percentage. For example, if you enter **50**, then it appears in the SharePoint server as 5000%.

7 If necessary, type a check-in comment.

8 Type the file name for the scanned document, and then touch **OK**.

Note: The following characters cannot be used for file names: ~ " # % & * : < > ? / \ { | }

9 If necessary, adjust the scan settings.

Notes:

- If no printer hard disk is installed, then the maximum file size is 20MB.
- For the list of supported file types, see the *Readme* file.
- You can select **CSV** as the output format for the Optical Character Recognition feature.

10 Touch **Send**.

11 Send the document, scan the next page, or cancel the job.

Printing documents


Note: Before you begin, enable printing in the Embedded Web Server.

1 From the home screen, touch the application profile icon.

2 If prompted, enter your credentials.


3 Navigate to the document library or folder where your document is saved.

Notes:

- To open your personal site or folder, touch **My Site**. Depending on the default start location, you may need to scroll up to locate My Site.
- To view either the files and folders or only files, touch  > **Filter**.

4 Touch the file name.

Notes:

- To view the file information, touch .
- For the list of supported file types, see the *Readme* file.

5 Touch **Print**.

Note: The screen timeout is disabled when printing is ongoing.

Troubleshooting

Application error

Try one or more of the following:

Check the diagnostic log

- 1 Open a web browser, and then type **IP/se**, where **IP** is the printer IP address.
- 2 Click **Embedded Solutions**, and then do the following:
 - a Clear the log file.
 - b Set the logging level to **Yes**.
 - c Generate the log file.
- 3 Analyze the log, and then resolve the problem.

Note: To avoid insufficient memory problems, after analyzing the log, set the logging level to **No**.

Limit the number of profiles that you create

You may encounter problems if there are too many profiles. If the printer memory is 2GB, then we recommend creating only up to 80 profiles.

Adjust the scan settings

- 1 From the Embedded Web Server, navigate to the configuration page for the application.
- 2 Add or edit a profile.
- 3 From the Scan Settings section, select a lower scan resolution or turn off color scanning.
- 4 Click **Apply**.

Contact your Lexmark representative

Cannot connect to the SharePoint server

Try one or more of the following:

Make sure that the SharePoint server is working

For more information, contact your SharePoint administrator.

Touch the application icon again

The server may take a few seconds to respond while in Sleep mode.

Make sure that the application settings match the SharePoint server settings

For more information, see [“Configuring the application settings” on page 9](#).

Make sure that the printer is connected to the network

For more information, see the printer *User’s Guide*.

Check the diagnostic log

- 1** Open a web browser, and then type **IP/se**, where **IP** is the printer IP address.
- 2** Click **Embedded Solutions**, and then do the following:
 - a** Clear the log file.
 - b** Set the logging level to **Yes**.
 - c** Generate the log file.
- 3** Analyze the log, and then resolve the problem.

Make sure that you have access rights to the SharePoint URL

- 1** Open a web browser, and then type the SharePoint URL.
- 2** Log in using an administrator account.

Note: If you do not have an administrator account, then contact your SharePoint administrator.
- 3** From the landing page, click the settings icon, and then click **Site Settings**.
- 4** From the Users and Permissions section, click **Site Permissions > Check Permissions**.
- 5** Type your user name.
- 6** Click **Check Now**.

Note: Users that have Read or View Only access may not be able to connect to the SharePoint server through the application. To change your permission level, contact your SharePoint administrator.

Contact your Lexmark representative

Cannot authenticate user

Try one or more of the following:

Check the application settings

Make sure that the authentication options and SharePoint settings in the application configuration page match the settings for the SharePoint Online server. For more information, see [“Configuring the application settings” on page 9](#).

Make sure that you specify the correct credentials

Make sure that you have access rights to the SharePoint URL

1 Open a web browser, and then type the SharePoint URL.

2 Log in using an administrator account.

Note: If you do not have an administrator account, then contact your SharePoint administrator.

3 From the landing page, click the settings icon, and then click **Site Settings**.

4 From the Users and Permissions section, click **Site Permissions** > **Check Permissions**.

5 Type your user name.

6 Click **Check Now**.

Note: If you have Read or View Only access, then contact your SharePoint Online administrator to change your permission level.

Contact your Lexmark representative

Cannot access My Site

Try one or more of the following:

Make sure that you specify the correct URL scheme for My Site in the configuration page for the application

For more information, see [“Configuring the application settings” on page 9](#).

Make sure that My Site is configured properly in the SharePoint server

For more information, contact your SharePoint administrator.

Cannot access a site or find it in the list

Try one or more of the following:

Make sure that the application settings match the SharePoint server settings

For more information, see [“Configuring the application settings” on page 9](#).

Make sure that you have access to the SharePoint server and have proper site permission

For more information, contact your SharePoint administrator.

Make sure that all subsites are listed in the site collection

- 1 Log in to the SharePoint server.
- 2 From the computer, launch the SharePoint server Central Administration site, and then click **Application Management > Site Collections > View all site collections**.
- 3 Confirm if your site is in the list.

Note: You need administrative rights to add a site. For more information, contact your SharePoint administrator.

Contact your Lexmark representative

Cannot scan or print documents

Try one or more of the following:

Make sure that scanning or printing is enabled

- 1 From the Embedded Web Server, access the configuration page for the application.
- 2 From the SharePoint Settings section, enable scanning or printing.
- 3 Click **Apply**.

Make sure that the SharePoint URL does not exceed the length limit

For more information, see the help documentation for your SharePoint server.

Make sure that all appropriate network cables are connected securely and that the printer network settings are configured correctly

For more information, see the printer *User's Guide*.

Make sure that the file type is supported

For the list of supported file types, see the *Readme* file.

If you cannot print a PDF file, then make sure that the file is not encrypted

Make sure that you have access rights to the SharePoint URL

- 1 Open a web browser, and then type the SharePoint URL.
- 2 Log in using an administrator account.
Note: If you do not have an administrator account, then contact your SharePoint administrator.
- 3 Depending on your SharePoint Online server, click the settings icon or **Site Actions**, and then click **Site settings**.
- 4 From the Users and Permissions section, click **Site permissions > Check Permissions**.

- 5 Type your user name.
- 6 Click **Check Now**.

Cannot scan documents in color

Configure the application to scan documents in color

- 1 From the Embedded Web Server, navigate to the configuration page for the application.
- 2 From the Scan Settings section, in the Color menu, select **On**.
- 3 Click **Apply**.

Error in uploading multiple pages

Try one or more of the following:

Increase the printer timeout

For more information, see the printer *User's Guide*.

Increase the timeout in the SharePoint Online server

For more information, contact your SharePoint Online administrator.

Contact your Lexmark representative

The application quits when opening a document library

Try one or more of the following:

Make sure that the SharePoint URL does not exceed the length limit

For more information, see the help documentation for your SharePoint server.

Move or delete some files in the SharePoint document library

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