



Lexmark™

Scan to FileBound

Version 1.0

Administrator's Guide

August 2023

www.lexmark.com

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Change history

August 2023

- Initial document release.

Overview

Overview

Use the application to scan documents and upload them to an Upland FileBound server.

You can select the project, divider, separator, and file in which to save the uploaded document.

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

Deployment readiness checklist

Make sure that:

- You have an Upland FileBound server.
 - You have an Upland FileBound user account.
 - You have a Hard Disk installed on your printer.
 - You have an Upland FileBound application server web address (URL of the server).
-

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.
 - From the printer home screen, touch **Settings > Network/Ports > Network Overview**.
- 2 Open a web browser, and then type the printer IP address.

Configuring the settings

Configuring the settings

- 1 From the Embedded Web Server, navigate to the configuration page for the application: Apps > Application Name > Configure.
- 2 Do either of the following:

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

- **Change the icon text and the icon.**
From the Home Screen section, specify the text and image that you want to appear on the home screen.
- **Configure the application settings.**
 - In the FileBound server field, type the FileBound URL.
 - In the Default Filename field, type a valid file name.

Note: You can type up to 58 characters. Only alphanumeric characters, underscores, dashes, and white spaces are allowed.

- In the Scan Settings field, select **Show** or **Hide**.
- In the File Format field, select **PDF** or **TIFF**.

Note: Only PDF and TIFF file formats are supported.

- 3 If necessary, set the default account to use to log in to FileBound.

Notes:

- If it is set, the Default Account is used to log in to FileBound.
- If you do not set a default account, then you are asked to log in screen every time you launch the application.

- 4 Click **Apply**.

Importing or exporting a configuration file

Importing or exporting a configuration file

Notes:

- Importing configuration files overwrites the existing application configurations.
 - When you export the configuration file, passwords are not saved. Set the password again after importing the file.
- 1** From the Embedded Web Server, navigate to the configuration page for the application: Apps > Application Name > Configure
 - 2** Click **Import** or **Export**.

Using the application

Scanning documents

Notes:

- Before you begin, enable scanning in the Embedded Web Server.
- The default account is used when launching the application.

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, type your credentials.

4 Select a project, and then touch **Next**.

Notes:

- If there is no default account, then type your credentials.
- Projects in the FileBound server are listed alphabetically and are limited to the first 100 entries.

5 Type the information (search phrase) to look for a file, and then touch **Search**.

Note: The search phase must be at least 3 characters.

6 Select from the search results then press **Next**.

7 If necessary, select a separator, and then touch **Next**.

8 Select a divider, and then touch **Next**.

Note: Dividers and separators are limited to 100 entries.

9 Type the file name, description, and notes (if necessary), and then touch **Next**.

Notes:

- The default value of the file name is taken from the Default Filename setting in the configuration page.
- The following characters are not allowed: ~ " # % & * : < > ? / \ { | }

10 If necessary, adjust the settings.

Note: If no printer hard disk is installed, then the maximum file size is 20MB.

11 Touch **Send**.

12 Send the document or scan the next page.

Note: To check for the uploaded document, login to the FileBound portal and search for the document.

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**.

Contact your Lexmark representative

Cannot connect to the application

Try one or more of the following:

Check the FileBound URL or user account

Make sure the FileBound Server URL is correct and that the username exists and the password is correct.

For more information, contact your FileBound administrator.

Touch the application icon again

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

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:
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 - b Set the logging level to **Yes**.
 - c Generate the log file.
- 3 Analyze the log, and then resolve the problem.

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This section was intentionally left blank. The contents of this section are found in the corresponding addendum described above.

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EXHIBIT A.

Text for this Exhibit A is found in the corresponding addendum, described in section 6.4 above, text file provided by the Initial Developer. This license is not valid or complete with out that file.

EXHIBIT B.

Text for this Exhibit B is found in the corresponding addendum, described in section 6.4 above, text file provided by the Initial Developer. This license is not valid or complete with out that file.

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