Solution Center eSF Application

Version 1.0

Administrator's Guide

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Contents

Change history

July 2024

- Initial document release.

Overview

Solution Center is an Embedded Solutions Framework (eSF) application available on Lexmark printers and multifunction products (MFPs). It allows users to view and execute workflows that have been configured through the Lexmark Cloud Services Solution Center portal. The Solution Center eSF application does not create or customize solutions. Instead, it retrieves preconfigured solutions from the Solution Center portal, enabling users to capture, process, and route documents directly from the device.

The application supports the following cloud service providers:

- Box
- Dropbox
- Google Drive™
- Microsoft OneDrive
- Microsoft SharePoint

This document provides instructions on how to deploy, configure, and use the application.

Getting started

Deployment readiness checklist

Before you begin, make sure that:

- [ ] The printer is a multifunction product (MFP) with a 4.3-, 7-, or 10-inch screen.
- [ ] The printer firmware is running on 081.xxx or later.
- [ ] The printer is enrolled in Lexmark™ Cloud Services.

  Note: For more information, see the *Lexmark Cloud Services Administrator's Guide*.
- [ ] Lexmark Cloud Services accounts have been set up for all users.
- [ ] Solution Center is enabled for your organization.

Installing the application

Note: The installation and deployment of this application is done in Cloud Fleet Management. For more information, see the Lexmark Cloud Services Administrator's Guide.

To install Lexmark Solution Center, create a configuration and then deploy the configuration to the printer.

Deploying the Solution Center configuration to the printer

1. From the Embedded Web Server, click **Apps**.

   Note: Make sure that the printers meet the requirements for installing Solution Center. For more information, see "Deployment readiness checklist" on page 5.
2. Click **Install an app** > **Browse**, and then select the FLS application file.
3. Click **Install**.

Using the application

Accessing the application

Viewing solutions

1. From the printer home screen, touch **Solution Center**.
2. From the Solutions List page, select any of the following:
    - **Personal**
    - **Organizational**
    - **Shared**

    Note: Some solutions may not be displayed. These are referred to as non-executable solutions, as they might involve steps that the printer is not able to execute. For example, the downloading step is not supported. Adding a solution that includes a download step results in hiding the solution.

3. To view the details of a specific solution, touch ⋮ > **View Details**.

    Notes:

    - The details include solution name, description, type, steps, and default file name etc.
    - Relaunch the application to refresh the solution list.

Using a quick run

- The quick run feature executes a solution immediately with all steps preconfigured and locked from the portal.
- To run a solution using quick run, select a solution and then, click **Next**.

Viewing quotas

1. From the Solution Center, navigate to the Solutions List screen.
2. Click ⋮ > **View Quotas**.

- The Quotas dialog shows the number of pages used.
- If you have quotas for Translation, Redaction, and OCR, then the pages used for these actions appear.

Note: On the Quotas screen, you can also view the details about the billing cycle.

Navigating through the steps of the application

- The Steps screen lets you navigate through steps. You can only modify settings that are unlocked in the portal.
- On every step, fields can be disabled or enabled in the panel based on the unlock/lock settings configured in the portal.

1 From the Solution Center, navigate to the Solutions List screen.

2 Select a solution, and then click **Next**.

Notes:

- The Steps screen shows the configured steps for each selected solution.
- On the Steps screen, users can move through the steps by clicking the **Next** button, up to the Summary step.
- Clicking the **Next** button on any step initiates validation for the current step. If there are validation issues, users cannot proceed to the next step until the issues are resolved.
- You can navigate back to previous steps, if required.

Extracting text with OCR

Optical character recognition (OCR) lets you convert scanned documents into editable text.

1 From the Solution Center, navigate to the OCR step.

2 On the OCR step, select the output format from the list of options.

3 Click **Next** to apply the settings.

Translating a document

This step lets you scan a file in a source language and translate it to a target language.

Selecting languages

1 From the Solution Center, navigate to the Translate step.

2 Select the language of the document that you want to translate.

3 Select one or more target languages.

Note: You can select up to five target languages.

Redacting information

The Redact feature lets you automatically remove any confidential information such as Personally Identifiable Information (PII) from documents.

Configuring redact

1 From the Solution Center, navigate to the Redact step.

2 Click **Add Text to Redact**

3 Select any of the following:

- **Preset**—Select predefined redaction settings based on common PII types (for example, phone numbers, social security numbers) or specific country regulations.
- **Custom**—Select custom text only if you want to redact specific texts from the file. Do any of the following:
  - In the Specify custom text to redact field, type the text to be redacted.
  - From the menu, select **Whole word only**, **Contains**, or **Exact Match**.

Notes:

- If you select **Whole word only**, then only words that match the word you have entered in the Specify custom text to redact field get redacted.
- If you select **Contains**, then text that contains the words you have entered in the Specify custom text to redact field get redacted.
- If you select **Exact Match**, then only letters that exactly match the one you have entered in the Specify custom text to redact field get redacted. These letters can be a part of a word or phrase.
- For **Custom text**, the maximum limit is 20 words combining **Whole word only**, **Contains**, and **Exact match**.

Notes:

- Users can add up to 20 custom texts only.
- If a solution includes a Redact step but does not include an OCR step, then the input file type must be DOCX.
- If a solution includes both Redact and OCR steps, then the supported input file types are image files (such as JPEG or PNG) and PDF.

Sending emails

1. From the Solution Center, navigate to the Email step.
2. Type the email address.
3. To receive a copy of the email, select **Send me a copy**.

Notes:

- The email address has a limit of 255 characters.
- Users can proceed to the next step only if at least one email address is added.
- If no email addresses are entered, the solution can still run if **Send me a copy** is enabled.
- Fields can be disabled or enabled in the panel based on the unlock/lock settings configured in the portal.

Adding a footer

1. From the Solution Center, navigate to the Footer step.
2. In the Footer field, type the text that you want to appear as the footer of the page.
3. Click **Next** to save the changes.

Notes:

- Users can input up to 512 characters in the footer.
- The input to the Footer step must be DOCX format if the solution does not include any OCR steps.
- If the footer text field is disabled in the portal, the footer step screen does not display in the panel.

Configuring cloud storage

The Cloud Storage feature allows you to send documents directly to various cloud platforms.

1. From the Solution Center, navigate to the Cloud Storage screen.
2. Select a cloud platform:
   - **Microsoft OneDrive**
   - **Dropbox**
   - **Box**
   - **Google Drive**
   - **Microsoft SharePoint**
3. Configure the platform-specific settings:
   - For OneDrive, Box, and Dropbox, specify the destination folder by setting the Send To and Path options.
   - For Google Drive, set the Drive Name option.
   - For SharePoint, set the Site Name and Path options.

Note: An error message appears in the following scenarios:

- The selected account is signed out.
- No cloud storage is selected, and all storage accounts are signed out.
- A cloud storage account is disabled in global settings.
- A duplicate folder is created.
- The folder name exceeds the allowed maximum length.
- The path is invalid due to an inaccessible or deleted folder.

Using cloud print queue

- The cloud print queue feature allows user to send print jobs directly to the Cloud Print Management queue.
- Once a print job is uploaded to the cloud, it remains securely stored until the user releases it at a physical printer.

Printing

The Print feature within the Solution Center allows users to print from a connected device.

- Users can configure the number of copies to be printed directly from the printer panel.
- Users must have the appropriate roles and access permissions to execute print jobs.

Editing a file name or file type

Note: You can edit the file name and file type on the panel only if editing is enabled in the portal.

1. From the Solution Center, navigate to the File step.
2. Click the file name or file type to edit it, and then click **OK**.

Viewing a summary

1. From the Solution Center, navigate to the Summary step.
2. The summary screen provides an overview of all configured steps.

Notes:

- The summary screen shows a list of locked and unlocked steps.
- A lock icon indicates that a step or any setting within a step is locked and cannot be edited. If only one setting of a step is locked, then only that setting shows a lock icon in the summary screen.
- To edit unclocked steps, swipe back to the Steps screen.

Executing the application

After configuring all the steps and completing the scan step, click **Send**.

File size limits for scanned steps:

- The general file size limit is 50MB.
- If the solution includes a Translate step, then the file size limit is reduced to 40MB.
- If the solution includes an Email step, then the file size limit is reduced to 25MB.

Note: Executing the solution automatically sends the document to its configured destination.

Troubleshooting

Cannot access the Solution Center eSF application

Try one or more of the following:

Make sure that the user roles are assigned correctly

Make sure that the Solution Center application is enabled for your organization

For more information, contact your organization administrator

Cannot run some of the solutions

Try one or more of the following:

If you are running a solution that contains Footer or Redact steps, the printer must have a valid OCR license and a printer hard disk is installed.

Make sure that you have sufficient quota.

Make sure that the user roles are assigned correctly.

For more information, contact your organization administrator.

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