



# Forms and Favorites

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## Administrator's Guide

**Important:** This guide is intended for MX6500e.

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## Overview

*Forms and Favorites* lets users quickly and easily print frequently used documents from the scanner control panel. First, configure a bookmark to point to the location of an electronic file. The electronic form or other document can be located on a Web site, a network drive, or an FTP site. Then, access the form or other document by touching the application icon on the scanner home screen. Bookmarks can also be saved as shortcuts directly to the scanner home screen for immediate access to your documents and forms.

# Configuring Forms and Favorites

For information on configuring and using the application from the control panel, see “Using Forms and Favorites” on page 5.

For a comprehensive explanation of each setting available when adding or editing a bookmark, see the mouse-over help beside each field.

**Note:** When configuring bookmarks, more options are available from the Embedded Web Server than from the control panel.

## Configuring bookmarks

1 From the Embedded Web Server, click **Settings > Apps > Apps Management**.

2 From the list of the installed applications, click the name of the application.

3 Click **Configure > Add**.

**Note:** You can also edit or delete existing bookmarks.

4 Type a name for the bookmark.

5 If necessary, adjust the remaining configuration settings.

**Note:** See the mouse-over help beside each field for a description of each configuration option.

6 Click **Apply**.

## Customizing the display icon

1 Access the application configuration settings from the Embedded Web Server.

2 From the Configure page, add or edit a profile, and then change the settings if necessary:







- **Button Text** or **Text**—Type up to 20 characters that will appear above the profile button on the scanner home screen. This field is optional.
- **Button Icon** or **Icon**—Browse to a new image file that represents the profile on the scanner home screen. This field is optional.
- **Button Icon when pressed** or **Icon when pressed**—Browse to a new image file that will appear while the profile icon is being pressed. This field is optional.

3 Save or discard your changes.


# Using Forms and Favorites

## Bookmarking forms

### Adding a bookmark using the control panel




- 1 From the home screen, touch the application icon.
- 2 If necessary, touch **Options**.
- 3 Touch .
- 4 Type a name for the new bookmark. This name will appear 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 scanner.
  - **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 scanner.
- 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 control panel



- 1 From the home screen, touch the application icon.
- 2 Touch the bookmark you want to edit or delete.
- 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 control panel

- 1 From the home screen, touch the application icon.
  - 2 If necessary, touch **Options**.
  - 3 Touch .
  - 4 Type 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 control panel

- 1 From the home screen, 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 control panel” on page 5.



### Editing or deleting a folder

- 1 From the home screen, 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, 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 home screen, touch the application icon.
  - 2 Touch .
  - 3 Type a keyword in the Search For field, and then touch .
- The results of your search appear.

## Saving bookmarks as shortcuts

You can turn frequently accessed bookmarks into shortcuts that show up on the 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, touch the application icon.
- 2 Touch the name of the bookmark you want to save, and then touch .
- 3 Touch .
- 4 Type the name for the shortcut as you want it to appear on the 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 home screen. Because of space constraints, users may need to scroll through the home screen to access all of the available icons.

# Troubleshooting

## Forms are not available or are not working

Try one or more of the following:

### **MAKE SURE THE BOOKMARK IS CONFIGURED PROPERLY**

For information on configuring bookmarks, see “Configuring Forms and Favorites” on page 4.

### **MAKE SURE THE BOOKMARK IS POINTING TO THE CORRECT LOCATION**

Verify that the form resides in the correct network location. The scanner will not validate the location that the bookmark points to. As a result, if the URL or network location that was specified when the bookmark was created is incorrect, the scanner will not be able to access the document.

## Some bookmarks do not appear in an exported configuration file

### **MORE THAN 60 BOOKMARKS CANNOT BE EXPORTED IN A .UCF FILE**

Only up to 60 bookmarks can be exported in a single .ucf file. Any bookmarks that are not included in the file must be added to the scanner manually.

## Appendix

### Accessing application configuration settings using the Embedded Web Server

**1** Obtain the scanner IP address:

- From the scanner home screen
- From the TCP/IP section in the Network/Ports menu
- By printing a network setup page or menu settings page, and then finding the TCP/IP section

**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

**2** Open a Web browser, and then type the scanner IP address in the address field.

The Embedded Web Server appears.

**3** From the navigation menu on the left, click **Settings > Apps > Apps Management**.

**4** From the list of installed applications, click the application you want to configure, and then click **Configure**.

### Exporting and importing a configuration using the Embedded Web Server

You can export configuration settings into a text file, and then import it to apply the settings to other devices.

**1** From the Embedded Web Server, click **Settings > Apps > Apps Management**.

**2** From the list of installed applications, click the name of the application you want to configure.

**3** Click **Configure**, and then do either of the following:

- To export a configuration to a file, click **Export**, and then follow the instructions on the computer screen to save the configuration file.

**Note:** If a **JVM Out of Memory** error occurs, then repeat the export process until the configuration file is saved.

- To import a configuration from a file, click **Import**, and then browse to the saved configuration file that was exported from a previously configured device.

**Notes:**

- Before importing the configuration file, you can choose to preview it first.
- If a timeout occurs and a blank screen appears, then refresh the Web browser, and then click **Apply**.

## Checking which version of the Embedded Solutions Framework is installed on a scanner

**1** Obtain the scanner IP address:

- From the scanner home screen
- From the TCP/IP section in the Network/Ports menu
- By printing a network setup page or menu settings page, and then finding the TCP/IP section

**Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

**2** Open a Web browser, and then type the scanner IP address in the address field.

**3** From the Embedded Web Server, click **Reports > Device Settings**.

**4** Scroll down until you see “Embedded Solutions” (usually found near the bottom).

**5** In the Embedded Solutions section, note the value next to “Framework =”. This signifies the installed version.

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