Kyocera Cloud Information Manager

Customer Admin Guide

Legal notes

Regarding trademarks

Guide type: Subscription

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1 Product information

Conventions

The following conventions may be used in this guide:

- **Bold text** is used for menu items, buttons, and providing emphasis where needed.
- Screen, text box, and drop-down menu titles are spelled and punctuated exactly as they are displayed on the screen.
- *Italics* are used for document titles.
- Text or commands that a user enters are displayed as text in a different font or in a text box as shown in these examples:

1. On the command line, enter `net stop program`.

2. Create a batch file that includes these commands:

```
net stop program
gbak -rep -user PROGRAMLOG.FBK
```

- Icons are used to draw your attention to certain pieces of information. Examples:

This indicates information that is useful to know.

This indicates important information that you should know, including such things as data loss if the procedure is not done properly.

Kyocera Cloud Information Manager documentation

Kyocera Cloud Information Manager Customer Admin Guide (This guide)	This guide provides information about Kyocera Cloud Information Manager for Customer admins. It provides a product overview and instructions for managing users.
Kyocera Cloud Information Manager User Guide	This guide provides information about Kyocera Cloud Information Manager for end-users. It provides instructions on how to activate a user account and use Kyocera Cloud Information Manager.

System requirements

Versions indicated are recommended versions for best performance with Kyocera Cloud Information Manager. Using an earlier web browser or operating system version may cause unforeseen issues.

Kyocera Cloud Information Manager supported web browsers

Browser	Supported versions
Google Chrome	Version 70 or later
Microsoft Edge	Version 106 or later
Apple Safari	Version 14 or later

Kyocera Cloud Information Manager Mobile application supported operating systems

Platform	Supported versions
iOS	14.0 and later
Android	10 and later

2 Introduction

This guide is intended assist those who want to manage Kyocera Cloud Information Manager (KCIM) as an administrator.

In this guide, the phrase "KCIM MFP client application," refers to the **software** installed on an MFP (Multi-Function Printer). The terms "device," "devices," and the term "MFP" by itself, are used to refer to the MFP **hardware** where the "KCIM MFP client application" is installed.

- To manage users see the *Customer Portal Admin Guide*.
- To use KCIM as a user, see the *Kyocera Cloud Information Manager User Guide*.

The guide has the following chapters:

1. **Product information**: Describes documentation, conventions used in this guide, and system requirements to use both the Customer Portal and Kyocera Cloud Information Manager .
2. **Introduction**: Describes the Customer Portal and KCIM key features, portal hierarchy, user interface, and roles in KCIM.
3. **Getting started**: Describes how to activate your account and manage your organization's account settings.
4. **Dashboard**: Describes the KCIM Dashboard interface.
5. **Search**: Describes how use the search feature.
6. **Folders**: Describes the Folders interface.
7. **Processes**: Describes how to monitor and manage your running and completed task processes.
8. **Retention Management**: Describes how to manage documents that are under retention.
9. **KCIM MFP client application**: Describes how to install and manage the KCIM MFP client application.
10. **Appendix**: Describes additional information about KCIM.

About the Customer Portal

The Customer Portal is part of a cloud-based software application solution platform for office environments.

- As an Admin, you use the Customer Portal to manage users and application settings for your organization.
- As a user, you use the Customer Portal to launch applications like Kyocera Cloud Information Manager. You also use the Customer Portal to manage your profile, which all Customer Portal applications share.

Customer Portal key features

Using the Customer Portal, you can access the following features:

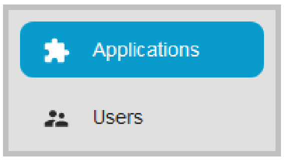
- **Applications**: Launch available applications, and/or manage the settings for applications.

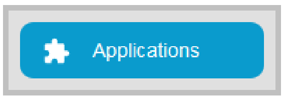
> You are re-directed from the Customer Portal to the application whose settings you want to manage.

- **Users**: Manage users in your organization.
- **Organization Profile**: Manage organization display name, representative, and language preference for your organization.
- **My Profile**: Manage your Customer Portal profile, which is shared by all Customer Portal applications.

Customer Portal user interface and roles

When using the Customer Portal, Admins and users see different menu items.

User interface	Description
Role: Org. representative, Admin	
	The Org. representative and any Admin in the Customer Portal can: • Launch applications and manage the settings for applications where the settings can be changed. • Manage users • Manage your organization's profile • Manage your user profile • View guides See the *Customer Portal Admin Guide* for information about managing users.

User interface	Description
Role: Users	
	A user in the Customer Portal can: • Launch applications • Manage their user profile • View guides

About Kyocera Cloud Information Manager

Kyocera Cloud Information Manager (KCIM) is a cloud-based document management and archiving solution for office environments. KCIM is launched from the Customer Portal.

Kyocera Cloud Information Manager key features

Customer Admin key features

Using the KCIM web portal, a Customer Admin can access and configure the following Kyocera Cloud Information Manager (KCIM) features:

Retention Management

- View and manage documents that are archived. This feature only displays if Retention Management has been activated.

User key features

The Customer Admin also has access to these features.

Using the KCIM web portal, a user can access the following features:

- **Dashboard**
  - View and manage tasks
  - Upload documents
  - Index uploaded documents individually or in bulk
  - Sign documents
- **Folders**
  - Manage uploaded documents and folders
  - Request that documents be archived. This feature only displays if Retention Management has been activated.
  - Edit Microsoft 365 Word, Excel, and PowerPoint documents from within KCIM. The Microsoft 365 integration feature must be available for your region to use this feature.
- **Processes**
  - View and manage task processes created by you

Using the KCIM mobile application, a user can access the following features:

- Upload documents to Kyocera Cloud Information Manager (KCIM)

Using the KCIM MFP client application, a user can access the following features:

- Scan and upload documents to KCIM
- If you or an Administrator set up the "Fax forwarding" feature, incoming faxes are forwarded to KCIM and appear in the "Documents to index" area.

Behavior for failed log in attempts

The behavior for failed log in attempts is the same for all access types:

- Accounts are locked after three failed attempts to log in within 15 minutes.
- Accounts are automatically unlocked after 30 minutes to allow users to retry logging in.

Current access types include:

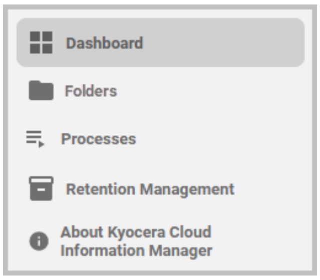
- KCIM web portal
- KCIM MFP client application
- KCIM mobile application

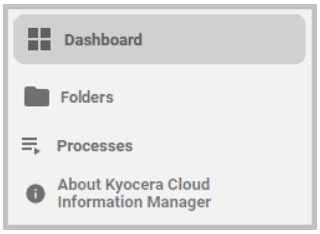
Forgot password

If you forget your login information, you can select the **Forgot password** link on the Customer Portal login page and follow the instructions to create a new password.

Kyocera Cloud Information Manager user interface and roles

When using KCIM, the Customer Admin and users see different menu items.

User interface	Description
Role: Customer Admin	
	A Customer Admin in the KCIM web portal can: • View and manage documents that are archived. Retention Management only displays if Retention Management has been activated. See the *Customer Portal Admin Guide* for information about managing users.

User interface	Description
Role: Users	
	A user in the KCIM web portal can: • View their tasks • Upload documents • Index uploaded documents individually or in bulk • Manage uploaded documents • Assign tasks to users • Request signatures

3 Getting started

This chapter describes how to set up and manage Kyocera Cloud Information Manager (KCIM) for you and your organization. Setup requires some actions on the Customer Portal.

Your local KCIM dealer creates an account for you as the Customer Administrator and sends you an activation email.

- Before you can use your KCIM account, you need to activate and log in to your KCIM account on the Customer Portal.

  This guide describes how to use KCIM as a Customer Admin. See the *User Guide* for information on using KCIM as a user.

- If there is a change to the terms of the "End User License Agreement" (EULA) that differs from the EULA when you started using KCIM, you are asked to agree to the updated EULA immediately after logging in.

KCIM setup workflow

Use the setup workflow chart below to perform the activities required to get KCIM operational. Follow the workflow in order. Each topic listed in the table has a matching topic or chapter in this guide or in the *Customer Portal Admin Guide (CPAG)*.

Check the *CPAG* regarding any topics that involve users as indicated in the table below.

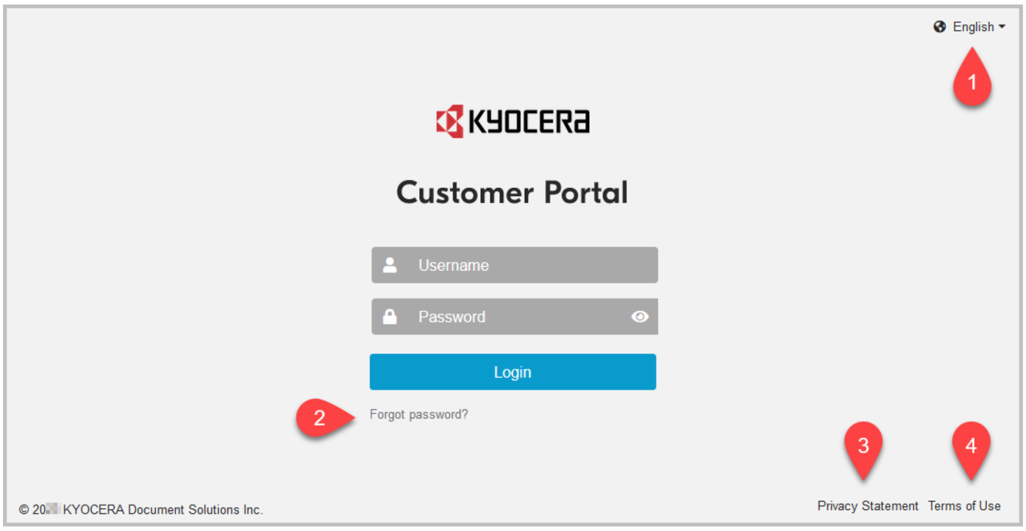
Topic	Item	Activity	Note
Activate your account	1	Receive your email and activate your account.	If 7 days have passed after receiving an activation email in step 1, you need to request a new activation email from your local KCIM dealer.
Assign Document class permissions to your account	2	Assign yourself all available Document classes to see them in the KCIM web interface.	

Topic	Item	Activity	Note
Edit KCIM settings	3	Edit the KCIM settings for yourself and your organization.	Your organization may want some features checked, such as the OCR language settings, or activated, such as Retention Management or a signature service.
Set up the KCIM MFP client application	4	Install the KCIM MFP client application on any devices where you want users to access KCIM.	You can install the KCIM MFP client application on devices at any time after step 1.
	5	Activate the KCIM MFP client application where it is installed.	
	6	Enter the KCIM domain name, organization name, and PIN code to test the connection.	Assume you have completed step 4.
Operation check	7	Check that KCIM is operating for your organization as expected.	Use your account to test KCIM functionality.
Folders	8	Create folders where your users can store uploaded documents.	Users can create folders for themselves, but you may want to create a standard set of folders for your organization.
Create an Administrator account (See CPAG)	9	Create Administrator accounts for users on the Customer Portal. These users help you manage day-to-day KCIM administration tasks such as managing users, devices, or folders.	
Users (See CPAG)	10	Register and manage users. Users can log into KCIM.	Add regular users to the Customer Portal. As the Customer Admin, you can add users, or a user with an Administrator account can add users.

About the Log in page

To log in to Kyocera Cloud Information Manager, you must first log in to the Customer Portal. The Customer Portal is where you launch KCIM and any other applications made available to your organization.

If there is a change to the terms of the End User License Agreement (EULA) or Privacy Statement that differs from when you started using KCIM, you are asked to agree to the updated EULA and Privacy Statement after completing your log in.



Language (1)

Make a selection from this menu to change the user interface language. This icon is also available on other pages.

Forgot password? (2)

If you have forgotten your password, select this link to reset it.

Privacy Statement (3)

Depending on how the system is set up, you may have a link to a Privacy Statement.

Select this link to view how your data is handled.

Terms of Use (4)

Select this link to view the Terms of Use about this product.

Activate your account

After an account is created for you, you are notified by email that your account is ready for activation.

- Your account is activated on the Customer Portal.

- The account created for you is an "Org representative" account, a "super administrator" account and is assigned the username `admin`.
- There can be only one Org representative account in your organization.
- The user with the Org representative account is considered the "Customer Admin" for your organization.
- During the activation process, you are asked to create a new password.

If the activation process is not completed within seven days, your account is deleted. You will have to request a new account from your local KCIM dealer.

1. Open your activation email and read the contents carefully.
2. In the email, select **Activate now**.
   A browser window opens and displays the actions that you need to take next.
3. Select **Click here to proceed**.
4. Enter a new password and password confirmation. The password requirements display when you select the Password text box. When your password and password confirmation meet the requirements and match, the Submit button becomes available.
5. Select **Submit**.
6. Make any updates to the information presented, note any changes you made to any of the information, and then select **Submit**.
   A message displays that your account has been updated.
7. Select **Back to Application**.
   The Customer Portal "Login" window displays.
8. Enter your user name and password and select **Login**.
9. You will see separate notices for the Customer Portal and any software that your organization has made available. For each notice, select the links to read the information provided. After reading the information, select the "I have read" check boxes and select **OK** for each notice.
10. After a successful log in, the Customer Portal displays the Applications pane. On the Kyocera Cloud Information Manager tile, select **Launch App**.

Read the *KCIM setup workflow* topic for the next steps to set up KCIM.

To set up users, go to the *Customer Portal Admin Guide*.

Assign Document class permissions to your account

After you have activated your account as the Organization representative, assign yourself access to document classes. If you do not assign yourself document class permissions, some parts of the user interface are not available to you. By default, no permissions are selected for any document class for any users.

To edit, change, or add a "Document class" or "Attribute," contact your local Kyocera Cloud Information Manager dealer. To make Document class or Attribute changes yourself, see the *Document classes and Attributes* section in the *Appendix*.

1 Open a browser and log in to your Customer Portal account.

2 Select **Applications** from the navigation pane and then on the Kyocera Cloud Information Manager tile, select **Manage Settings**.
The KCIM **Settings** pane displays.

3 Select the **Document class permissions** tab.
All Customer Portal users are displayed on the tab.

4 Locate your account.

5 Either double-click your user name or select your user name and then select **Edit**.

6 In the Document class area, select the **All** check box in the **All** row.
All the check boxes in the Document class area are selected.

7 Select **Submit**.
A message displays to tell you that you have updated your account. You are automatically logged out of your account.

8 Log in using your Customer Admin account.
After a successful log in, the KCIM Dashboard displays.

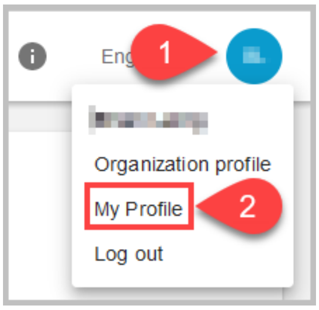
All parts of the KCIM user interface are available to you.

View and edit your Customer Portal user profile

You can update your Customer Portal user profile at any time.

1 Open your browser and log in to your Customer Portal account.

2 Select your user (name) icon (1) and then select **My Profile** (2).



The "My Profile" pane displays. The "General" tab is selected by default.

3 You can change any of the items in the "Contact information" area. The "Current Role" area is read-only if you are the Org. representative. Read the *Current role* topic for more information.

4 If you made any updates, select **Save**.

5 Select an item from the navigation pane to close the "My Profile" pane.

General

The General tab on My Profile contains the following settings:

Contact information

Displays your first name, last name, user name, email address.

Current role

Displays your current role.

Select **Save** after making any changes.

Contact information

You can change any of the following items:

First name

Displays your current first name. The first name can be up to a maximum of 64 characters. The following characters are **not** allowed: \ / ; * ? " < > | [ ] { } $ % & ( ) = ! # ~ ^

Last name

Displays your current last name. The last name can be up to a maximum of 64 characters. The following characters are **not** allowed: \ / ; * ? " < > | [ ] { } $ % & ( ) = ! # ~ ^

Username

Displays your current user name. Your user name can be a minimum of 4 up to a maximum of 64 UTF-8 characters. The following characters are **not** allowed: \ / : , ; * ? " < > | [ ] { } $ % ` & ( ) + = ! # ' ~ ^

Email address

Displays your current email address. Your email address can be up to 132 characters.

Select **Save** after making any changes.

Current role

You can change your current role if you are an Administrator. If you are currently the Org representative, you assign a user to take your role on the **Organization Profile** pane.

1 If you are currently an **Administrator**, you can change your role to an Org. Representative on the "My Profile" pane.

a) Select **Org. representative**.

b) Select **Save**.
Your role is immediately changed. The previous Org. representative has their role changed to Administrator.

2 If you are current the **Org. representative**, you cannot change your role on the "My Profile" pane. Perform the following steps to assign your Org. representative role to another user.

a) Select your user (name) icon

b) Select **Organization profile**.

c) On the General tab, select the **Organization representative** menu, and then select a user from the list.

> The list only displays users with Administrator or Org. representative rights. Users with "User" rights do not display in the list.

d) Select **Save**.
A message displays that the change was successfully updated. The user you selected is now the Org. representative. You are now an Administrator.

View Kyocera Cloud Information Manager settings

After you log in to KCIM, you can view the KCIM settings for you and your organization at any time:

- **Plan**: Displays information about your organization's account.
  - **Subscription information**: The current subscription information and uploaded data usage for your organization is displayed. See the *Subscription status* topic in the *Dashboard* chapter for more information.
- **Schema**:
  - **Document indexing**: This setting decides the visibility of documents available to users to index. If users in your organization upload sensitive documents, you may want to adjust the setting to restrict documents from displaying in the "Documents to index" area of the Dashboard. See the *Document indexing* topic in this chapter for more information.
  - **Document classes and Attributes**: The current document classes and attributes available in KCIM are displayed. See the *Document classes and Attributes* section in the *Appendix* for more information.
- **OCR**: Set the languages for OCR processing. Up to 8 languages can be selected.
- **E-signature**: If activated, the signature service being used displays. Only one signature service can be active at any time.
- **Retention**: If activated, the word "Active" displays.
  - **Activating the feature**: See the *Retention Management* **topic** in the *Getting started* chapter for more information about activating the feature.

- **Using the feature**: See the *Retention Management* **chapter** for information about using the feature.

  The Retention Management feature cannot be deactivated after it has been activated.

- **Document class permissions**: Set the permissions for each user to view, edit, or delete documents in KCIM.
- **Display**: Changes the accent color and dark and light modes on the user interface.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.
3. Select any tab to see the current settings for that tab.
4. Select any item from the navigation pane to close the Settings pane.

Edit Kyocera Cloud Information Manager settings

After you log in to your account, you can edit the settings for you and your organization at any time.

Plan

You can view but cannot edit your organization's plan in KCIM. Contact your Customer Portal dealer if you have questions about your organization's current plan.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.
3. Select the **Plan** tab to see the current plan settings. Items displayed are:
   - **Subscription details**
   - **Usage**
   - **Billing**

   When your organization is getting close to completely using the uploaded data usage allotment, a message displays on the Dashboard above the File upload area. All users see the messages. A message also displays on the Settings tab.

To see more information about your subscription and subscription messages, see the *Subscription status* topic in the *Dashboard* chapter.

4 Select any item from the navigation pane to close the Settings pane.

Schema

The Schema tab lets you change the "Document indexing" feature and "Document classes" and "Attributes."

Do NOT change anything in the "Document Classes" and "Attributes" area unless you understand the impact of the changes you make. Any changes cannot be undone.

To make "Document class" or "Attribute" changes yourself, see the *Document classes and Attributes* section in the *Appendix*.

Document indexing

On the Settings pane, you can set the visibility of the documents available to users to index. If users in your organization upload sensitive documents, you may want to adjust the setting to restrict documents from displaying in the "Documents to index" area of the Dashboard.

Change the Document indexing feature

Before changing a "Document indexing" feature setting, make sure you understand what happens when you make a change.

Read step 4 closely about who is allowed to see and index documents before changing from the default setting.

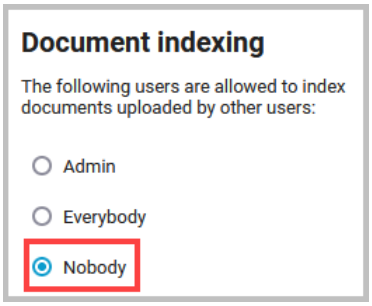
1 Open your browser and log in to your Customer Portal account.

If you are already in KCIM, select the **Settings** icon and skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.

3 Select **Schema**.

4 In the "Document indexing" area, make a selection. By default, **Nobody** is selected.



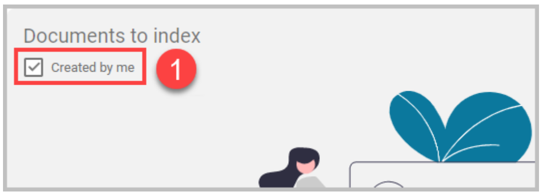
Admin

Admin users can view and index documents uploaded by any KCIM user. The "Created by me" check box (1) displays in the "Documents to index" area on the Dashboard for Admin users.

Non-admin users (2) can only view and index documents they have uploaded. The "Created by me" check box does not display in the "Documents to index" area on the Dashboard for non-admin users.

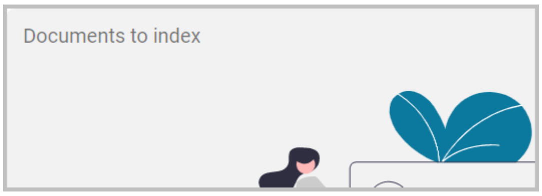
Everybody

All users can view and index documents uploaded by any user. The "Created by me" check box (1) displays in the "Documents to index" area on the Dashboard. Selecting "Created by me" filters the "Documents to index" area to display only documents uploaded by the logged in user.



Nobody

This is the **default** setting. All users, including admins, can only view and index documents they have uploaded. The "Created by me" check box does not display in the "Documents to index" area on the Dashboard.



Any settings change you make is effective when users log out and log back in again. The change is not immediate for users that are already logged in.

Document classes and Attributes

The "Document classes" and "Attributes" area of the **Schema** tab lets you manage KCIM document classes and attributes.

See the *Document classes and Attributes* section in the *Appendix* for information.

Use caution when adding, editing, or deleting any document classes or attributes. If you are not familiar with the process, contact your local KCIM dealer for help. Changes to document classes and attributes cannot be undone.

OCR

You can set the OCR (Optical Character Recognition) languages for documents uploaded to KCIM.

Only non-searchable PDF documents have the OCR process automatically run when uploaded. No other document file format has OCR processing done when uploaded.

Non-searchable PDF documents are typically image-based, such as a brochure or invoice. You cannot copy text from them. These files require the OCR process to become searchable.

Select the languages that commonly occurs in documents uploaded to KCIM by your organization's users. You can select a maximum of 8 languages.

When you first open the OCR tab, you will see there are some default languages already selected for you. Review the selected languages and remove unneeded languages. Add languages as required.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.

3 Select **OCR**.

4 To add languages, select the **OCR languages** menu (1) and select the check boxes for languages you want recognized (2). You can also search for an OCR language (3). You can select up to 8 languages.

5 To remove a language, select the **X** next to the language to remove it from the list.

6 When finished, select **Save**.

7 Select any item from the navigation pane to close the Settings pane.

E-signature

On the Settings pane, you can activate or deactivate the e-signature service you want to use in KCIM.

- Only one e-signature service can be active at any time.
- Once an e-signature service is activated, all KCIM users can access the e-signature service.
- E-signature requests can only be made for a single PDF or Microsoft `.docx` document at a time. Multiple documents and other file types are not supported.
- Your company must have an account with the e-signature service you intend to activate. The credentials for the account are required to activate the e-signature service in KCIM.

As the Customer Admin, you and any Administrators you create can activate and deactivate an e-signature service on the **Settings** > **E-signature** pane. Let your Administrators know that they should never deactivate the activated e-signature service. If they deactivate the service, it is deactivated for all users. Any outstanding e-signature requests will not be completed.

Activate an e-signature service

Before activating an e-signature service, make sure you understand the conditions specified in the *E-signature* topic.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

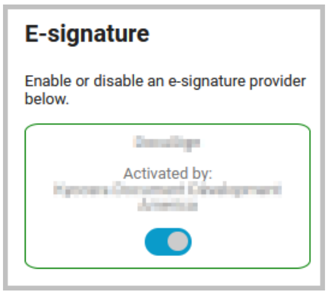
2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens the Settings pane.

3. Select the **E-signature** tab.

4. Select the toggle switch below the e-signature service name to activate it.
   By default, no e-signature service is active.
   A confirmation window displays.

5. Select **Activate**.
   A window from the e-signature service requesting login credentials displays.

6. Complete the log in steps required by the e-signature service using the credentials for your company's e-signature service account.
   After completing the signature service log in steps, you are returned to the KCIM e-signature service settings window, and the e-signature service is activated.

7. Select any item from the navigation pane to close the Settings pane.

Once the e-signature service is activated, the **Request signature** Action menu becomes available to users. Note the following:

- Users require "write" permission to the document class for any document they want to request signatures. The Request signature item on the Actions menu is unavailable if the user does not have the required permission.
- The log in credentials used to activate the e-signature service is applied to all users.
- When a user requests an e-signature, each signer receives an email via the e-signature service from the person who activated the e-signature service. The e-signature request does not come directly from the user who requested the signature.

The body of the email sent from the e-signature service must be configured in the selected e-signature service. KCIM only applies the email subject to the email sent from the e-signature service.

Deactivate an e-signature service

If an e-signature service is deactivated, any outstanding signature requests will not be completed.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens the Settings pane.

3. Select the **E-signature** tab.

4. Select the toggle switch below the active signature service name to deactivate the signature service.
   A confirmation window displays.

5. Select **Deactivate**.
   The selected e-signature service is deactivated.

6. Select any item from the navigation pane to close the Settings pane.

After deactivation, the **Request signature** Action menu item is no longer available to users. Any outstanding e-signature requests will not be completed.

Retention Management

On the Settings pane, you can activate the Retention Management feature for your organization so users can retain documents in KCIM.

This section discusses activating the Retention Management feature. See the *Retention Management* chapter for information using the feature.

As the Customer Admin (Org. representative), you and any Administrators you create can activate the Retention Management feature on the Settings pane. The Retention Management feature cannot be deactivated after it has been activated. Make sure you want to use this feature before activating it.

Activate Retention Management

Before activating Retention Management, make sure that you want to activate this feature. The Retention Management feature cannot be deactivated after it has been activated.

See the *Retention Management* chapter in this guide for more information about Retention Management before activating this feature.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens the Settings pane.

3. Select **Retention**.

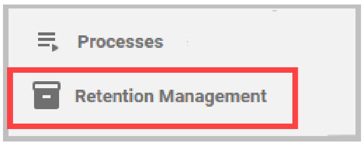
4. In the Retention Management area, select **Activate**. By default, Retention Management is not activated.
   A confirmation window displays. Read the message carefully.

5. To proceed with Retention Management activation, select **OK**.
   The status for Retention Management changes to Active.

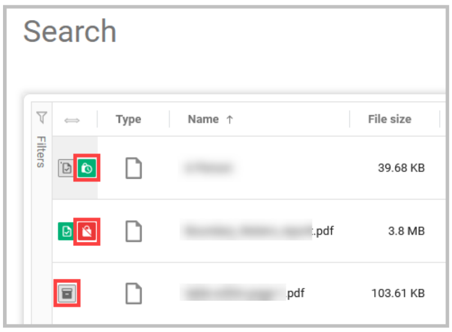
6. Select any item from the navigation pane to close the Settings pane.

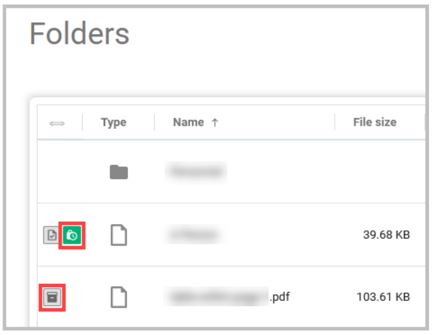
The feature is now available.

- Once the Retention Management feature is activated, all users can request the retention of a document and delete documents whose retention date has expired.
- Users require "write" permission to the document class for any document they want to retain. The **Request retention** item on the Actions menu is unavailable if the user does not have the required permission.
- Only the Customer Admin (Org. representative) or Administrators can see the **Retention Management** menu item on the navigation pane and set the retention date or extend the retention date on documents.

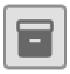


- All users can see documents that are in retention in a Search result or a "Folders" list.





- Documents waiting for a retention date to be set by an administrator display the grey "Retention requested" icon next to the file name.

  Documents with a retention date set by an administrator display the green "Under retention" icon. Hovering over the icon displays the amount of retention time remaining.

  Documents with an expired retention date display the red "Expired retention" icon. Hovering over the icon displays the how long the document has been out of retention. Expired documents can be deleted or have their retention date extended.

Document class permissions

When users are added to the Customer Portal, they do not have permission to view, edit, or delete any documents in KCIM. You must activate each user's document class permissions in KCIM before they can use the application.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens the Settings pane.

3. Select **Document class permissions**.
   A list of users that can use KCIM displays.

4. Select a user whose permissions you want to edit and then select **Edit**.
   A windows displays the current document class permissions for the selected user.

5. Select the document classes that this user can access and see on the user interface.

   - By default, no permissions are selected for any document class.
   - Select from **Read**, **Write**, or **Delete** for each document class listed.
   - Selecting **Write** or **Delete** for a Document class automatically selects the permission for the user to **Read** that Document class.
   - Select the **All** check box to select all document classes and permissions.

To edit, change, or add a "Document class" or "Attribute," you can either contact your local Kyocera Cloud Information Manager dealer or make the changes yourself. See the *Document classes and Attributes* section in the *Appendix*.

6. Select **Submit** to save the changes.
7. Repeat steps 5 through 7 for each user whose permissions need updating.
8. Select any item from the navigation pane to close the Settings pane.

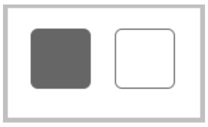
Display

Use the settings on this tab to change the dark or light user interface modes and accent color on the user interface.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.
3. Select **Display**.
4. To change the mode:
   a) In the "Dark mode" area, select the dark or light icon.

   The user interface updates to display your choice.
5. To change the accent color:
   a) In the "Accent color" area, select the desired color.

   The user interface updates with your selected color as the accent color.
6. Select an item from the navigation pane to close the Settings pane.

Operation check

After you have set up KCIM for you and your organization, perform the following checks to ensure that KCIM is operating as expected before you begin adding users.

If any of these steps do not work or appear as expected, contact your local KCIM dealer.

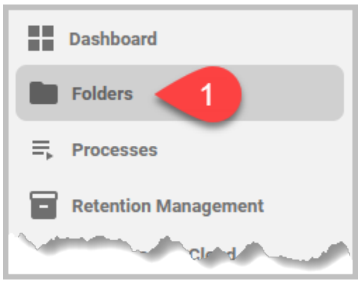
1 Open your browser and log in to your Customer Portal account.

If you are already in KCIM, skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens the Settings pane.

3 Select **Folders** (1) on the navigation pane and perform the following checks:

Retention Management only displays in the navigation pane if you have activated the feature.



a) Select **New folder**, enter a folder name, and then select **Create**. Make sure the folder was created.

4 On the Dashboard, perform the following actions:

The *User Guide* provides you with the information you need to complete these steps.

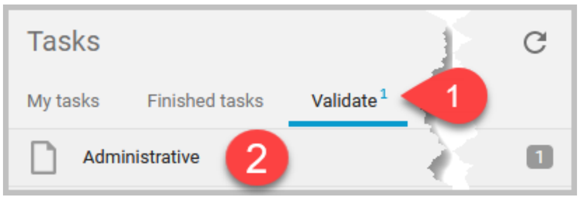
a) Upload a PDF document to make sure the upload function works as expected, which includes the document file name displaying in the "Documents to index" area.

b) Index the uploaded PDF document. Select any document class and select the new folder you created as the target folder. Select **Validation required** during the indexing process so that you can check the validation feature.

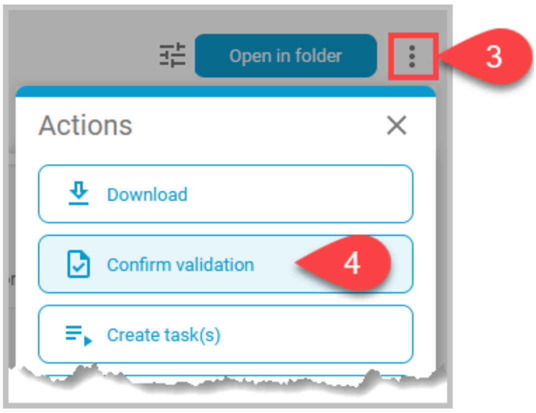
c) After indexing the PDF document, make sure it displays in the "Recently indexed" area. Select the document to display information about the document. Select each tab to ensure that data was added and that you can see a image of the document on the Content tab.

d) Select the **Dashboard** tab from the navigation pane.

e) In the Tasks area, select the **Validate** tab (1) and select the Document class to which you assigned the PDF document. (2)



On the Validate window, make sure the information is correct on each tab and then select the Actions menu (3) and then select **Confirm validation** (4)



5 If you have been able to perform all these steps and they work and appear as expected, you can begin adding users in the Customer Portal that will use KCIM.

Create an Administrator account in the Customer Portal

After activating your Org representative (Customer Admin) account and completing the KCIM operation check, set up a user account that becomes the day-to-day "Administrator" for KCIM. The Administrator user takes care of activities such as managing users, folders, and, if activated, documents in retention.

This Administrator can be you or other users you designate as an Administrator. You cannot assign the Administrator user the username `admin` since that is already assigned to you as the owner of the Organization representative account.

Go to the *Customer Portal Admin Guide* and see the *Add a new user* topic in the *Users* chapter for information about adding an Administrator account.

Password

You can use the "Forgot your password" link on the log in page to create a new password.

Forgot password

If you forgot or want to change your password, request a password reset from the "Login" window.

1. Open your browser and go to the Customer Portal "Login" window.
2. Select **Forgot password?**
3. Enter the user name you use for the Customer Portal.
4. Select **Submit**.
   A password reset email is sent to the email address associated with your user name. You have 24 hours to reset your password before the reset link expires.
5. Go to the email account associated with your user name for the password reset information.
6. Open the "Reset password" email from the Customer Portal.
7. Select **Reset password**.
   A new tab or window opens on your browser.
8. Follow the on-screen instructions to reset your password. You may have to log in again as part of the reset process.

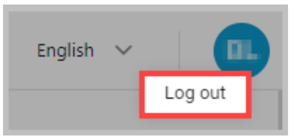
Log out of your account

When you have finished, logging out of your account is good security practice.

If you leave Kyocera Cloud Information Manager unattended for 15 minutes, you are automatically logged out unless you are editing a Microsoft 365 document.

If your organization allows editing Microsoft 365 documents, the 15-minute limit is disabled, so you can continue editing the document beyond the 15-minute limit. For more information, see the *About editing Microsoft 365 documents* topic in the *Folders* chapter.

1. Select your user name icon and then select **Log out**.



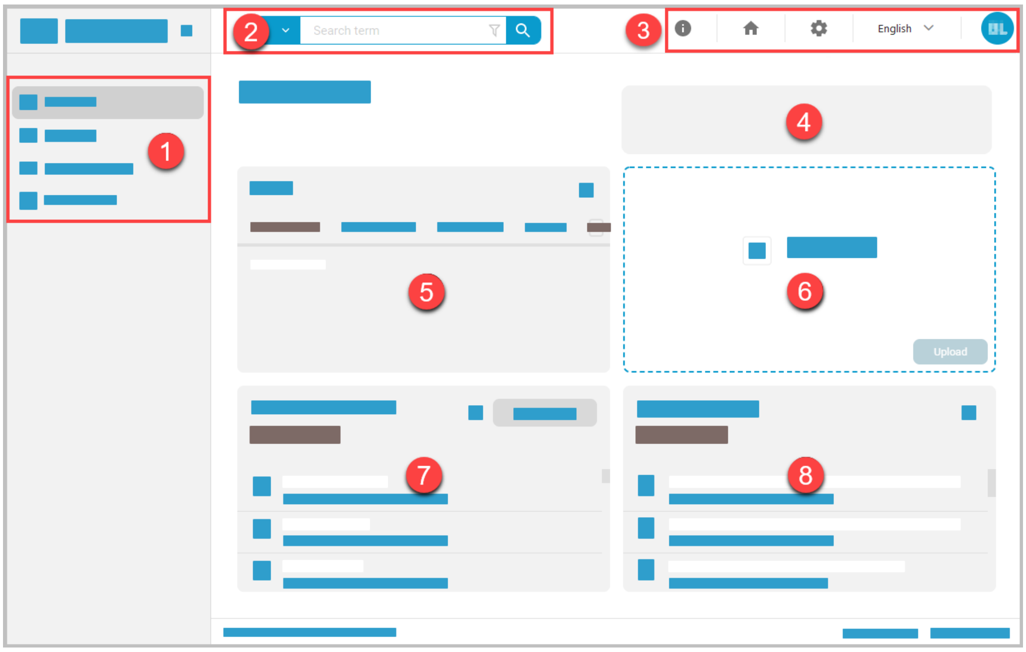
2. Close the browser window.

4 Dashboard

The Kyocera Cloud Information Manager (KCIM) Dashboard displays when you launch KCIM from the Customer Portal.

This chapter provides an overview of the Dashboard. For additional information about these features, see the *Kyocera Cloud Information Manager User Guide*.

- The **navigation pane (1)** provides access to these KCIM features:
  - Dashboard
  - Folders
  - Processes
  - Retention Management (Only displays if the feature is activated.)
  - About Kyocera Cloud Information Manager
- The top area of the Dashboard contains the **Search bar (2)**, the documentation link, the Customer Portal link, settings, language preference, and log out **(3)**.



The central pane of the Dashboard is divided into these areas:

Subscription status (4)

This area displays the KCIM subscription status for your organization. For example, "Your storage level is currently 70%."

See the *Subscription status* topic for additional information.

Tasks (5)

Any tasks assigned to you display in this area. A tab that displays a number indicates the number of tasks on that tab for you to finish.

File upload (6)

You can drag and drop files to upload in this area. You can also click in the area to manually upload files.

Documents to index (7)

As documents are uploaded, they display in this area to be indexed. By default, **Created by me** is selected, so only the documents you uploaded display. Clearing **Created by me** displays documents uploaded by all users.

If the "FAX forwarding" feature is set up on an MFP, incoming faxes display in the "Documents to index" area.

You must clear the **created by me** check box in order to see any forwarded faxes.

This area also provides the option to bulk index documents. Bulk indexing attaches the same metadata to all files selected for indexing.

Recently indexed (8)

This area displays the last 50 indexed files. By default, **Indexed by me** is selected, so you see the last 50 documents that you indexed. Clearing **Indexed by me** displays documents recently indexed to which you are granted Read access.

To see more than 50 documents or to see a particular document, use the Search bar.

Subscription status

When your organization is getting close to completely using the uploaded data usage allotment, a message displays on the Dashboard above the File upload area. All users see the messages.

The storage level includes all documents uploaded by all KCIM users in your organization.

Dashboard subscription messages

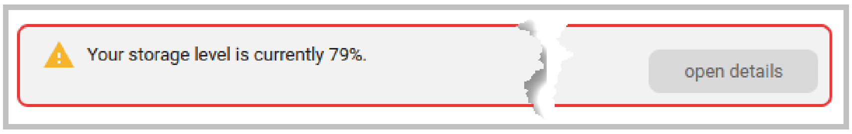
These are the messages that you and KCIM users may see on the Dashboard:

Your organization does not currently have a subscription plan

This message displays if you do not have an active subscription plan or if KCIM cannot reach the subscription server. If you see this message, try again in a few minutes. If the message persists, contact your local Kyocera Cloud Information Manager dealer.

Your storage level is currently xx%

This message displays when your organization's total storage data usage level is above 70%



Your storage level is 100%. Please subscribe to plan or delete some upload files

(Free plans only) Your organization's uploaded data usage quota upper limit has been reached. Once 100% of the allotted amount is reached, the free subscription plan stops users in your organization from uploading additional documents.

For any plan, you or anyone in your organization can delete files at any time to reduce data usage below 100% during a subscription period.

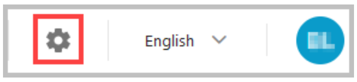
> Contact your local Kyocera Cloud Information Manager dealer if you have any questions about subscription limits and the overage charges that apply to your organization's subscription account.

Your organization, and any associated data, will be fully deleted from the service on mm/dd/yyyy

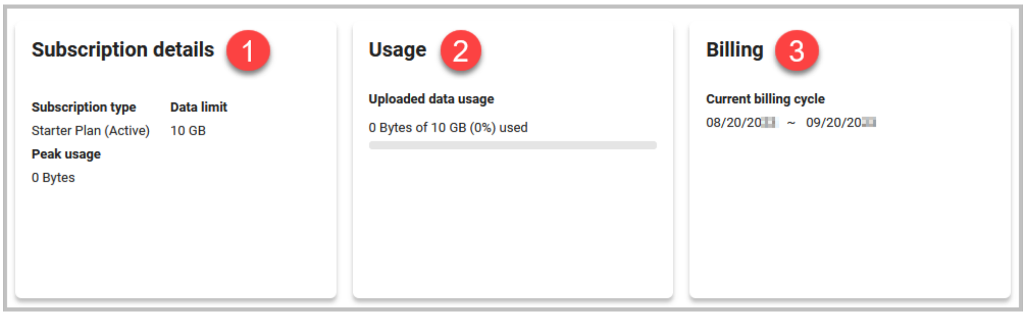
If your subscription has been cancelled, a message displays on the dashboard to inform you when your organization's data will be deleted. Deleted data cannot be recovered.

Settings pane subscription status

To view the KCIM subscription status for your organization, select the **Settings** icon.



The Settings pane defaults to the **Plan** tab which displays information about the following:



Subscription details (1)

- **Subscription type**: The subscription plan to which your organization has subscribed and if the plan is active or not.
- **Data limit**: The total amount of data your organization is allowed to store under the current subscription plan.
- **Peak usage**: For paid plans, this indicates the highest amount of usage during the current billing cycle. For example, if an organization has a 10 GB data limit in their plan, and the peak usage in the current billing cycle is 12.86 GB, this is 2.86 GB over the 10 GB allowed in the plan. The organization would be charged for the overage.

Usage (2)

- **Uploaded data usage**: The uploaded data usage shown is the total for all users in your organization. You can delete documents at any time in a billing cycle to reduce the uploaded data usage amount.

  Organizations with a free plan cannot upload additional documents if their allowance limit is reached. Providing the organization does not unsubscribe from KCIM, users can delete some already-uploaded documents to get below the limit. Once under the allowance limit, users can upload documents again.

Billing (3)

- **Current billing cycle**: The dates shown are the current billing cycle.

Contact your local Kyocera Cloud Information Manager dealer if you have any questions about subscription limits and any overage charges that apply to your organization's subscription account.

5 Search

The Search bar is always available at the top of all Kyocera Cloud Information Manager (KCIM) panes.

Due to search engine limitations, especially for Asian languages, a search for an exact match may result in no search results.

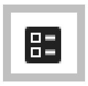
KCIM performs a global search for your entered search term across all document class types, all indexed document content, and all metadata. The search results display in the Search pane. You can use the filters provided in the Search pane to narrow your search results.

See the *Kyocera Cloud Information Manager User Guide* for information about advanced searching and logical operators.

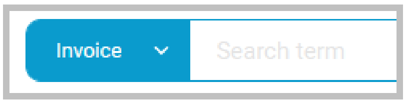
Document class selector (1)

The document class selector displays the count of document classes KCIM is currently set to search.

- If no classes are specified, **All** displays in the Search bar. The search term you enter is searched across all document classes.
- To specify document classes, select the ˅ icon and then select the document classes that KCIM searches. You can also refine the search by selecting other items presented in the window. Click the "Select all" icon to choose all items in a category.

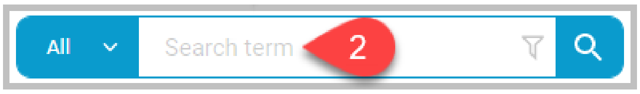
  When you have finished specifying document classes, click **Select**.
- If one document class is selected, the document class name displays in the Search bar.

- If more than one document class is selected, the number of document classes selected display in the Search bar.

- To clear the document classes searched, select the ˅ icon, select **Reset**, and click **Select** to close the window.

Search term (2)



Enter a search term.

- Search terms are not case-sensitive.
- Searching for a single character is not supported.
- If you want to enter multiple words in a search you can use +, -, AND, and OR as part of the search term. See the *Logical operators* topic in the *Kyocera Cloud Information Manager User Guide* for more information.
- Boolean, Integer, Decimal, and Date attributes are not searchable by keyword search. Only string attributes can be searched by full-text search.
- The term can include wild cards. Acceptable wild cards are:
  - asterisk (*): Matches any number of non-blank characters. You can use the asterisk (*) anywhere in a character string.
  - question mark (?): Matches a single non-blank character in a specific position. For example, 202? matches the years 2020 through 2029.
- To reset the search, select the "Reset search" icon.

Filter (3)

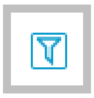
You can filter search results.

- Select the "Add search condition" icon to filter the search results.

- Create a search filter by selecting fields from the "Available metadata" area and applying filter criteria. You can apply multiple filters.

> You can also select a filter from the "#Archiving," "#Signature," "#Validation," and "Saved filters" lists.

- When a filter is applied to your search, the "Add search condition" icon changes color.



See the *Kyocera Cloud Information Manager User Guide* for information about advanced filtering.

Search (4)

When you are finished adding document classes and filters to your search, conduct the search.

- Select the Search icon or press **Enter** on your keyboard to conduct your search.

6 Folders

Select **Folders** from the navigation pane to display and manage folders and documents in Kyocera Cloud Information Manager.

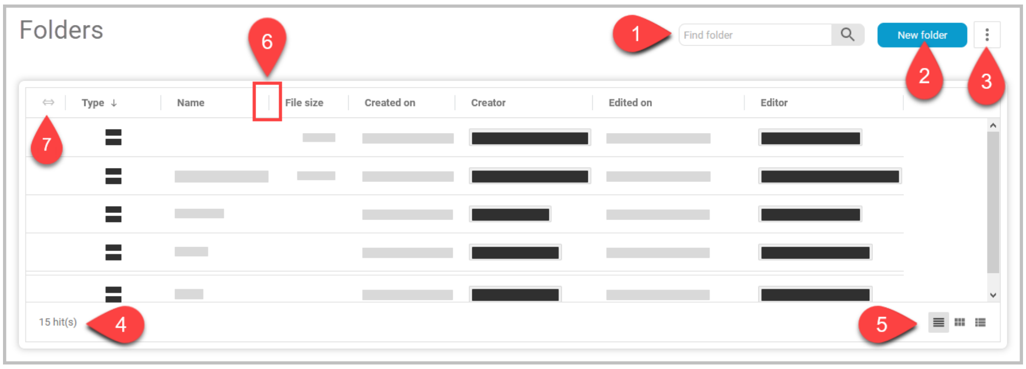
The Org. representative and Administrators can select documents in Folders and, using the Actions menu, perform Retention Management tasks such as "Request retention," "Set retention date," and "Extend retention date." See the *Retention Management* chapter in this guide for more information.

See the *Kyocera Cloud Information Manager User Guide* for additional information about Folders and the Actions menu. The User Guide contains additional information about using the Actions menu as a user instead of an Org. representative or Administrator.

Select any column header to sort the list by that column. Select the same column header again to reverse the order.

- When sorting, lowercase sorts after the uppercase folder or document names.
- The Creator and Editor columns are not sortable.

These tools are available to manage folders:



Find folder (1)

To locate a folder, enter a search term.

- The search term is not case-sensitive
- The term can include wild cards. Acceptable wild cards are:
  - Asterisk (*): Matches any number of non-blank characters. You can use the asterisk (*) anywhere in a character string.
  - Question mark (?): Matches a single non-blank character in a specific position. For example, 202? matches the years 2020 through 2029.
- Select the Search icon or press **Enter** on your keyboard to conduct your search.
- To reset the search and view all folders, select **X**.

New folder (2)

To create a new folder, select **New folder**, provide a folder name, and then select **Create**.

- A maximum of 256 folders can be created in KCIM, including sub-folders. All folders are shared by all users.
- The folder name must not exceed 255 characters.
- The folder name cannot use any of these characters: `\ / " : | < > * ? ;`
- A folder with the same name cannot be created in the same hierarchy.
- Sub-folders can be created.

Actions menu (3)

The Actions menu contains actions you can take on the currently selected folder/document. See the *Actions menu* topic in the *Kyocera Cloud Information Manager User Guide* for more information.

- The actions displayed in the menu depend on the folders or documents selected and the document class permissions you have.
- Only "New folder" can be executed when nothing is selected.

Hits (4)

The Hits area displays the number of folders/documents in the current view.

View (5)

Select an icon to change the view of the Folders list. Select from Table (default), Gallery, or List.

Adjust column width (6)

To manually adjust the width of a column:

1. Move your mouse cursor over the vertical heading bar (|) on the right side of the column you want to adjust.
2. When the cursor changes to a double-headed arrow, click and drag to adjust the column width.

3. Release the mouse button when you are finished adjusting the width.
4. Repeat to adjust any other columns. The column widths are retained between sessions.

To automatically adjust the width of a column:

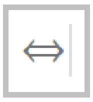
1. Move your mouse cursor over the vertical heading bar (|) on the right side of the column you want to automatically adjust.

2. When the cursor changes to a double-headed arrow, double-click the mouse button. The column width is automatically adjusted.
3. Repeat to automatically set the width of any other columns

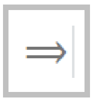
Reset all columns to default (7)

To reset all columns to the default column widths:

1. In the first column, select the icon. All columns are reset to display all columns using the current page's width.



2. To revert the column widths to the default column widths, select the icon in the first column again.

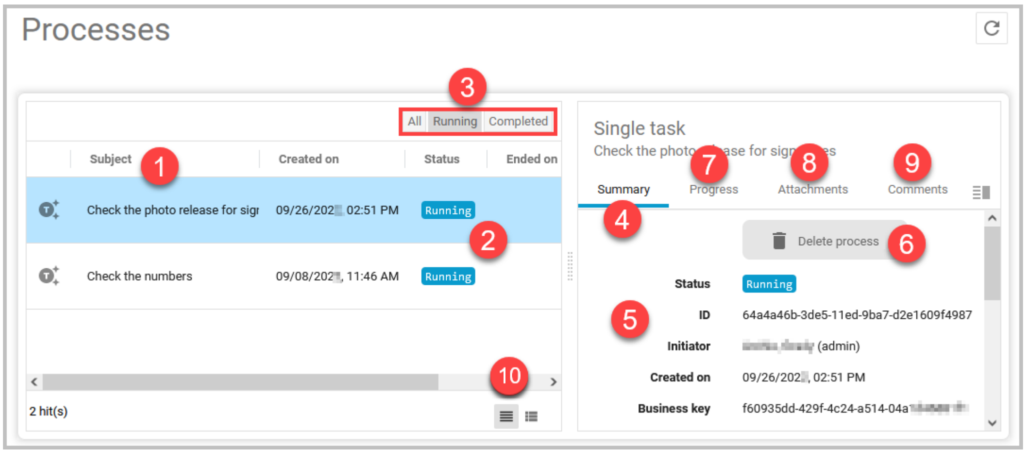


7 Processes

Select **Processes** from the navigation pane to monitor and manage your running and completed single task and task sequence processes in Kyocera Cloud Information Manager.

See the *Kyocera Cloud Information Manager User Guide* for information about creating single tasks and task sequences.

The image below shows the **Table** view of Processes.



Subject (1)

Each workflow task you created can be viewed here. Information included is when the task was created (**Created on**), the current task **Status** and when the task ended (**Ended on**). By default, all tasks with the **Running** (2) status are displayed. Switch between **All**, **Running**, and **Completed** tasks by making a selection in the header (3).

Summary (4)

The Summary tab is displayed by default. You can see information (5) about the selected workflow task, including when the tasks were started and completed.

To end a process, select **Delete process** (6). Confirm by selecting **Delete process**. If you end a process this way, the process does not appear in **All**, **Running**, or **Completed**. Once you delete a task, you can't restore it.

Progress (7)

The Progress tab details the progress of the task from inception to completion. Included is the date and time that the task was assigned.

Attachments (8)

The Attachments tab lets you see any attachments associated with the workflow task. Select the **Summary**, **Metadata**, **Content**, **History**, **Comments**, and **Signatures** tabs to see information about any attachments.

Comments (9)

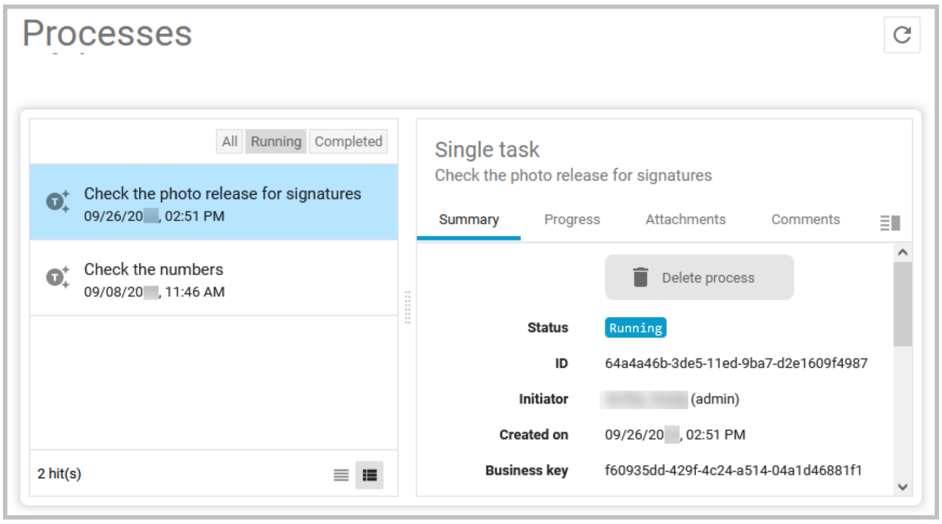
The Comments tab displays comments that were added to the task as opposed to comments that were added to any of the attached documents.

View (10)

Switch between Table and List views.

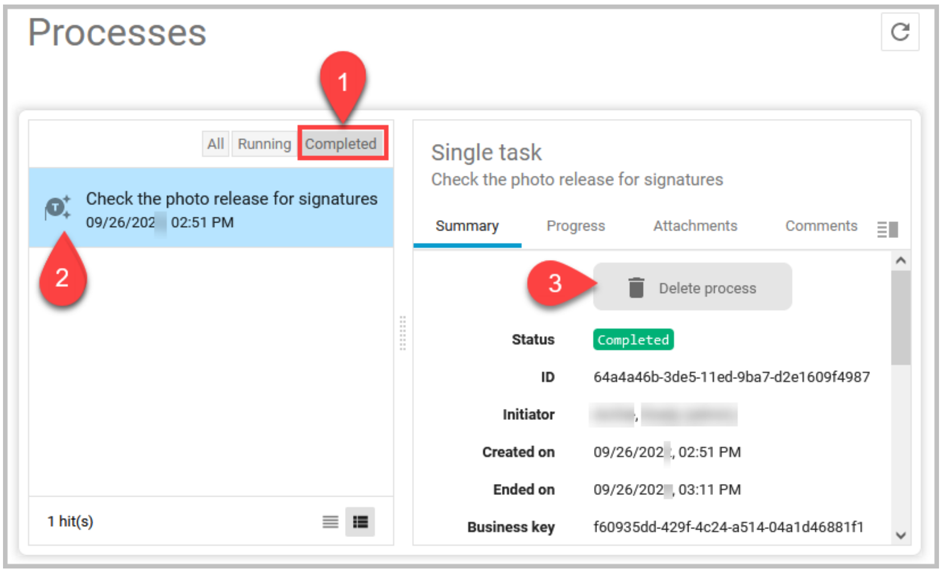
- The Table view includes the date the task was created, current task status, and the date the task ended.
- The List view includes the date and time information but you have to select a task to see the status.

An example of the List view is shown below.



Completed tasks

The system does not automatically delete completed tasks in case you need to refer back to see when a task was completed. You can manually delete completed tasks by selecting **Completed** (1), and then for each completed task you want to remove, select the task (2) and then select **Delete process** (3). You can only delete one process at a time.


Processes
1
All
Running
Completed
Check the photo release for signatures
09/26/202 02:51 PM
2
1 hit(s)
Single task
Check the photo release for signatures
Summary
Progress
Attachments
Comments
3
Delete process
Status
Completed
ID
64a4a46b-3de5-11ed-9ba7-d2e1609f4987
Initiator
Created on
09/26/202 , 02:51 PM
Ended on
09/26/202 , 03:11 PM
Business key
f60935dd-429f-4c24-a514-04a1d46881f1

8 Retention Management

The Retention Management feature in Kyocera Cloud Information Manager focuses on preserving and maintaining documents (records) within KCIM. The Retention Management feature allows users to select documents for retention in KCIM. The Customer Admin and Administrators then set retention dates on all documents selected for retention.

Reasons your organization may want to use the Retention Management feature include:

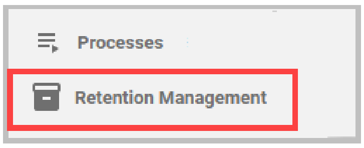
- Keep documents for a certain period of time as required by law or regulation. During that time, you can protect documents from being modified or deleted.
- Ensure that business can continue in an emergency by protecting critical documents.
- Preserve documents in a state where they can not be altered or deleted in a pending or anticipated lawsuit.
- Protect documents containing valuable information, such as historical company data, from accidental deletion or modification.

At a high level, any document, sometimes called a record, that is retained in KCIM follows these document life cycle stages:

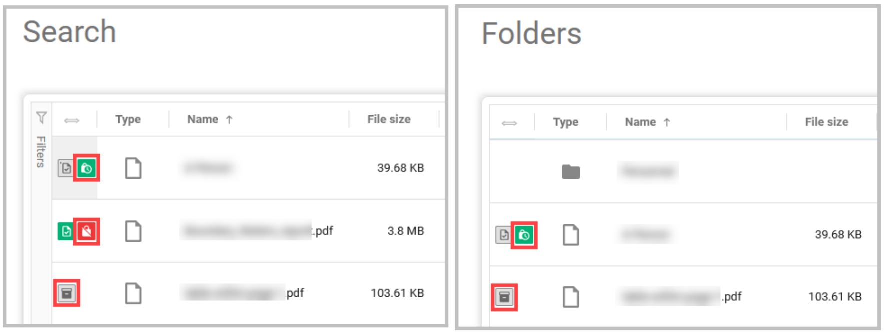
1. **Identification**: Identify documents to be retained.
2. **Retention**: Identify the period to retain the document. KCIM lets you set a retention date, the last day the document is retained. After the retention date has expired, the date can be extended if required.
3. **Destruction**: After the retention date, documents can be removed from KCIM.

See the *Activate Retention Management* topic in the *Getting Started* chapter for information about activating the feature. This feature cannot be deactivated once activated.

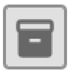
- Once the Retention Management feature is activated, all users can request the retention of a document and delete documents whose retention date has expired.
- Users require "write" permission to the document class for any document they want to retain. The **Request retention** item on the Actions menu is unavailable if the user does not have the required permission.
- Only the Customer Admin (Org. representative) or Administrators can see the **Retention Management** menu item on the navigation pane and set the retention date or extend the retention date on documents.



- All users can see documents that are in retention in a Search result or a "Folders" list.



  - Documents waiting for a retention date to be set by an administrator display the grey "Retention requested" icon next to the file name.

  - Documents with a retention date set by an administrator display the green "Under retention" icon. Hovering over the icon displays the amount of retention time remaining.

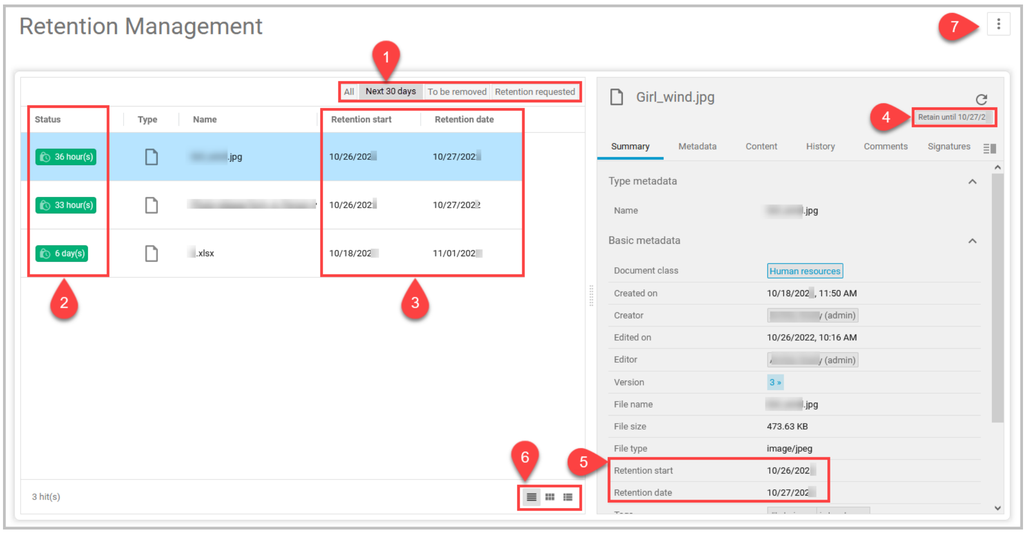
    

  - Documents with an expired retention date display the red "Expired retention" icon. Hovering over the icon displays the how long the document has been out of retention. Expired documents can be deleted.

Select **Retention Management** from the navigation pane to display to manage documents in Kyocera Cloud Information Manager that have a request for retention.

These tools are available to manage documents in Retention Management:



Records filter (1)

Select one of the filters to view documents tagged for retention:

- **All**: View all documents that are tagged for retention.
- **Next 30 days** (default filter): View all documents with a retention date expiring within the next 30 days.
- **To be removed**: View all documents that have a retention date that has passed.
- **Retention requested**: View all documents that have been tagged for retention but do not have any retention dates set. If you set a retention date on any document, the document moves to another filter based on the date you set.

Status (2)

The Status column displays icons to indicate the number of years, months, days or hours for any documents in retention.

- **Green icons**: The document is currently within the retention date. The number of years, months, days or hours indicates how long until the retention date expires.

- **Red icons**: The document is outside the retention date and can either be extended or deleted. The number of days or hours indicates how long it has been since the retention date for the document expired.

- **Retention requested**: The document requires a "Retention date" to be set.

Dates (3)

Two dates define any document that has been tagged for retention:

- **Retention start**: This is the date that a document was originally tagged for archiving.
- **Retention date**: This is when the retention date for a document ends. After this date passes, the document no longer needs to be retained.

Retain until (4)

At the top right corner of the information about the selected document, the date displayed shows when the retention date ends. A document without retention dates does not display the "Retain until" information and requires a "Retention date" to be set.

Retention information (5)

The Retention start and Retention date display on the Summary tab.

Retention tag

The **Archiving** tag displays on the Summary tab when a document is set for retention.

View (6)

Select an icon to change the view of the list. Select from Table (default), Gallery, or List.

Actions menu (7)

After selecting a document, select the Actions menu to see what actions can be applied.

- Documents with "Retention requested" have more options on the Actions menu than documents with retention dates set because they are not yet under retention.

  To set a retention date, which establishes the last day when a document is under retention, select **Set retention date**.

- If a document already has expired retention dates and you want to extend the end retention date, select **Extend retention date**.

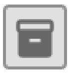
Request retention

Use your organization's archiving / records retention rules to decide if a document should be retained. **Request retention** does not automatically set the retention dates. To set a retention date, see the *Set retention date* topic.

- The "Request retention" menu item is available to all users.
- Only one document at a time can be set for retention, and only the Customer Admin or an Administrator can set the retention dates for a document.

1. Select one document from **Folders** or the results of a Search.
2. Select the **Actions** menu and then select **Request retention**.
   The "Request retention" window displays.
3. Select **Request retention**.

The document is tagged for retention and displays a grey "Retention requested" icon.



- All users can see any documents sent for retention in Folders or by using Search.
- Only the Customer Admin and any Administrators can set the retention date for documents sent for retention.

View all documents in Retention Management

You can view all the documents currently in Retention Management at any time.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Launch App**.
   Kyocera Cloud Information Manager opens.
3. Select **Retention Management** from the navigation pane.
4. Select the **All** filter to see all documents currently in Retention Management.
5. Select any column header to sort the table by the column you selected.
6. Select the same column header again to reverse the sort order.
7. You can use the Actions menu with any document in the list. The items presented in the Actions menu depend on the current retention status of the selected document. For example, the Actions menu won't display the **Delete** option if the retention date for the document has not expired.

Use Search to view documents in Retention Management

You can use the advanced search feature at the top of the KCIM window to locate documents in Retention Management.

1. Select the filter icon on the search bar.

   A menu displays, containing "Available metadata" "#Archiving," "#Signature," "#Validation," and "Saved filters."

2. Select the **+** in the #Archiving row to expand the list.
3. Select **archived (#Archiving)**.
4. Select the Search icon or press **Enter** on your keyboard to conduct your search.

All documents with the "archived" tag display in the search results.

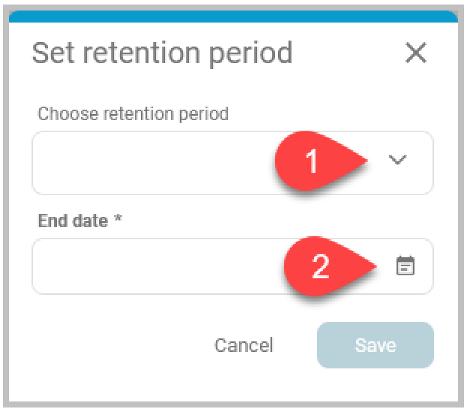
Set retention period

After a user requests retention on a document, the document moves to the **Retention requested** filter in **Retention Management**. The Customer Admin or an Administrator must set the retention period for each document.

1. Open your browser and log in to your Customer Portal account.

   If you are already logged in to KCIM, skip to step 3.

2. In the Kyocera Cloud Information Manager (KCIM) tile, select **Launch App**. Kyocera Cloud Information Manager opens.
3. Select **Retention Management** from the navigation pane.
4. Select the **Retention requested** filter to see a list of documents that do not currently have retention dates.
5. Select a document to set the retention date for that document.
6. Select the **Actions** menu and then select **Set retention period**. The "Set retention period" window displays.



7 **Choose retention period** (1): Select the number of years to retain the document. Based on your selection, the system calculates an end date for the retention period. The retention period begins on the day you set it for the document.
The "End date" changes to the date that the system calculates.

8 **End date** (2): If you did not select a year from the "Choose retention period" menu, you must enter the last date the document will be retained. Not choosing a year from the menu lets you choose different end dates than those available from the "Choose retention period" menu.

Select the calendar icon and the date to end the retention period based on your company's retention policy.

9 Select **Save**.
The "Retention start" and "Retention date" are updated in the list of documents. In the Status column, an icon displays the number of years, months, days, or hours until the retention period expires.

10 Continue setting the retention date for each of the documents in the list.

11 When finished, select the **Retention requested** filter. If there are no documents, you are finished setting retention dates.

Extend retention date

Periodically view the list of documents in retention to check for expired retention dates and to decide if they should have their retention date extended.

The **Extend retention date** menu item is only available for documents whose retention date has expired. You cannot extend any document's retention date if the document's retention date has not expired.

1 Open your browser and log in to your Customer Portal account.

If you are already in KCIM, skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Launch App**.
Kyocera Cloud Information Manager opens.

3 Select **Retention Management** from the navigation pane.

4 Select the **To be removed** filter to see a list of documents with retention dates that have expired.

You can also view and extend the retention dates for expired documents from the documents displayed using the **All** filter.

5 Examine the list for any documents that require you to extend the retention date.

6 To extend a document's retention date, select the document and from the **Actions** menu, select **Extend retention date**.
The **Extend retention date** window displays.

7 Select the calendar icon and select the new date when the retention date ends based on your company's retention policy. Past dates cannot be selected.

8 Click **Select**.

9 Select **Extend**.
The "Retention start" and "Retention date" are updated in the list of documents.

Remove expired documents

Documents in retention are moved to the **To be removed** filter after their retention date has expired. Use the Actions menu to delete expired documents in the list.

You can extend the retention date of any listed documents using the Actions menu if you do not want to delete them.

1 Open your browser and log in to your Customer Portal account.

If you are already in KCIM, skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Launch App**.
Kyocera Cloud Information Manager opens.

3 Select **Retention Management** from the navigation pane.

4 Select the **To be removed** filter to see a list of expired of documents.

5 For a document that requires removal, select the document and from the Actions menu, select **Delete**.
The **Delete** window displays.

6 Select **Delete**.
A message displays confirming the deletion of the document.

The document is no longer available to any users.

9 KCIM MFP client application

This chapter describes how to install the KCIM MFP client application on a device. For information on using the KCIM MFP client application, see the *Using an MFP with KCIM* chapter in the *Kyocera Cloud Information Manager User Guide*.

In this guide, the phrase "KCIM MFP client application," refers to the **software** installed on an MFP (Multi-Function Printer). The terms "device," "devices," and the term "MFP" by itself, are used to refer to the MFP **hardware** where the "KCIM MFP client application" is installed.

The KCIM MFP client application provides the functionality required at a device to allow users to scan to KCIM.

If the device has a FAX board, the device can forward faxes to KCIM for indexing and retention. See the *FAX tab* topic for more information about the Fax forwarding feature.

Typically, the Customer Admin is expected to conduct the KCIM MFP client application setup on the devices in their organization.

Devices may have different names and locations for buttons and menu items, depending on the model and firmware installed on the device. Consult the device-specific guide for button and menu item information if the names provided in these instructions differ from what you see on the device.

Set up the KCIM MFP client application

Before setting up the KCIM MFP client application on any devices, make sure you have your Organization's name available. The name is required to set up the KCIM MFP client application on a device.

The URL to access your organization's Kyocera Cloud Information Manager web site provides you this information. For example, if the URL you use is:

`https://acmecompany.yyy.dms-xxxx.org`

- The first part of the URL, `acmecompany` is the **Organization** name.

In this procedure, you save the KCIM MFP client application installation file to a USB drive and install it from the drive. The USB drive should be formatted to FAT32, as most devices cannot read the NTFS format.

To install the KCIM MFP client application on a device:

1. Save the installation file to the root directory of a USB drive.
2. On the device operation panel, press the **System menu** button (or **System Menu/Counter** button on some devices).

The System Menu displays.

3 On the System Menu, select **Application** (**Favorites/Application** on some devices).

You are prompted to log in as Administrator.

4 Log in as an Administrator, supplying the Admin user name and password for the device.

The Application (or Favorites/Application menu) displays.

> If a card reader is connected to the device and activated, you are asked to use your ID card. In such a case, select **Menu** and then select keyboard login. If the Menu button is not displayed, press the System Menu button (or System Menu/Counter) on the device operation panel – the terminal screen refreshes with the button displayed.

> If you see two options (Local login and Network login), select **Local** before entering the credentials.

> For information about the printing device's default password, how to enter the printing device's web interface, and how to find specific settings, see the printing device manual.

5 On the Application menu (or Favorites/Application menu), select **Application**.

The Application submenu displays.

6 Insert the USB drive with the installation file and select **Add** (or **+** on some devices).

A dialog box appears with information about the number of applications that can be installed.

7 Select **OK**.

The Add Application menu displays with the application item displayed.

> If a different version of the KCIM MFP client application is already installed on the device, the Update Program description is displayed next to the application name. If you update the KCIM MFP client application, the application version is changed, but all settings are preserved.

8 Select the item you are installing, select **Install**, and then select **Yes** to confirm the installation.

The Completed message displays, and the Add Application menu is empty.

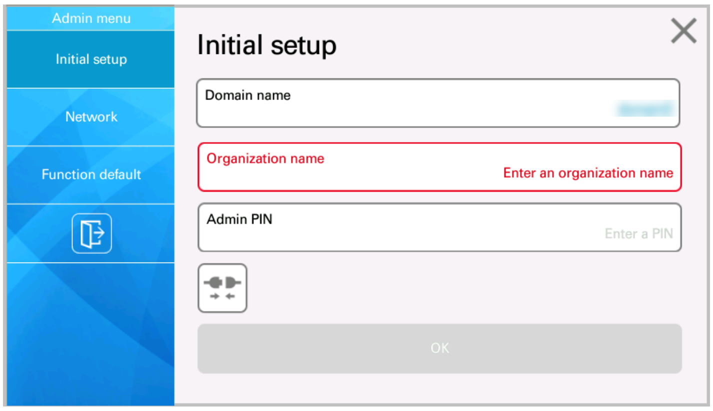
9 Select **Remove USB Drive** (or **Remove Memory** on some devices) to remove your USB drive safely.

10 When prompted that the USB drive can be removed, remove the drive and select **OK**.
The Application menu displays.

11 On the Application menu, select **Activate** (or **Launch** on some devices) and then select **Yes** to confirm the activation.
After the installation is finished a message displays.

12 Select the **Home** button on the keypad.

13 Select the **Information Manager** icon.
As this is the first time the application is being run, the "Initial setup" window displays.



14 The **Domain name** text box is auto-populated based on where the KCIM server is located.

> If you have a special situation where the KCIM server resides in a different geographic location in the world than the device, contact your local Kyocera Cloud Information Manager dealer for assistance.

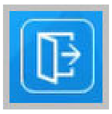
15 In the **Organization name** text box, enter the company's KCIM Organization name.

16 In the **Admin PIN** text box, enter a PIN. The PIN must be four digits in length and only include numbers between 0 and 9. Record the PIN information.

17 Select **OK**. The connection using the supplied information is tested.

a) If "Success" displays, a connection to KCIM was made.

Select the Exit icon.



The device is set up to use KCIM. Go to step 18.

b) If "Failure" displays, a connection to KCIM was not made.

Check entries you made and select **OK** again. If "Failure" displays again, see the *Network tab* topic for information about manually setting the connection information.

- Check with your Org. representative to make sure you have the Domain and Organization name correct.
- Check the *Device communication error codes* topic in the *Appendix* for information about any error messages you see.
- Check with your IT department to see if you are required to use network proxy settings for KCIM. If you are required to use network proxy settings, see the *Network tab* topic for more information.

18 Repeat this process for any other devices requiring setting up in your organization.

Admin mode

Admin mode lets you make adjustments to the KCIM MFP client application settings.

1 Select the Kyocera Cloud Information Manager icon on the device where you need to make the settings changes.

2 Select the settings icon to open the Admin menu.

The Admin mode window log in displays.

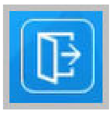
3 Enter Administrator credentials for the device.

4 Select **Log in**.

5 The Admin window displays with the "Initial Setup" tab displayed by default.

6 Make a selection from one of the tabs to open the settings window.

7 When finished, select the Exit icon to close the Admin window.



Initial setup tab

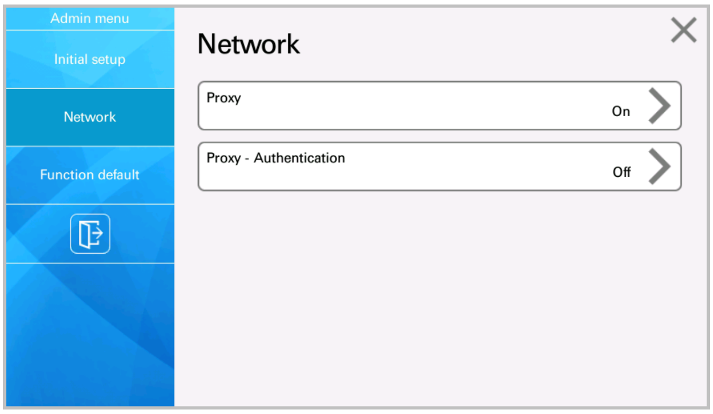
The Initial setup tab automatically displays when the KCIM MFP client application is first installed. After the initial setup for KCIM has been finished, you can select this tab to verify that the Domain and Organization names are correct, change the Admin PIN on the device, and test the connection.

When finished, select the Exit icon to close the Admin window.

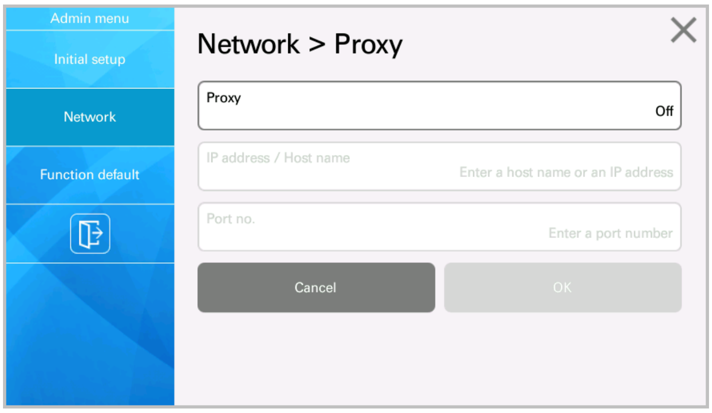
Network tab

The network tab lets you change network and proxy settings. This procedure assumes you have logged into the device and can see the Kyocera Cloud Information Manager Admin screen on the device panel.

1. Select the **Network** tab.



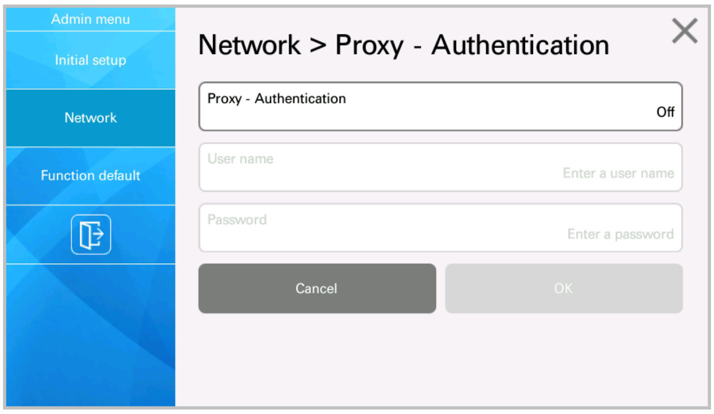
2. To set a Proxy server, select **Proxy** to turn on the feature.
The IP address / Host name and Port number text boxes become available.



3. Select **IP address / Host name** and enter either the host name or an IP address of the proxy server.

4. Select **Port number** and enter the Port number for communication with the proxy server. If you leave the Port number blank, port 80 is assumed.

5 Select **OK**.
The **Network > Proxy - Authentication** window displays.



6 If authentication is required for the proxy, select **Proxy - Authentication** to turn on the feature.

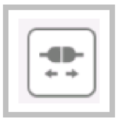
7 Select **User name** and enter the proxy user name.

8 Select **Password** and enter the proxy password.

9 Select **OK**

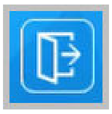
10 Select the **Initial setup** tab.

11 Select the "Test connection" icon.



a) If "Success" displays, a connection to KCIM was made.

Select the Exit icon.



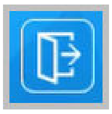
The device is set up to use KCIM. Go to step 12.

b) If "Failure" displays, a connection to KCIM was not made.

Check entries you made and select **OK** again. If "Failure" displays again, see the *Network tab* topic for information about manually setting the connection information.

- Check with your Org. representative to make sure you have the Domain and Organization name correct.
- Check the *Device communication error codes* topic in the *Appendix* for information about any error messages you see.
- Check with your IT department to see if you are required to use network proxy settings for KCIM. If you are required to use network proxy settings, see the *Network tab* topic for more information.

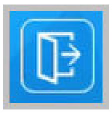
12 When finished, select the Exit icon to close the Admin window.



Function default tab

This tab allows you to set the defaults for the functions that are available for users.

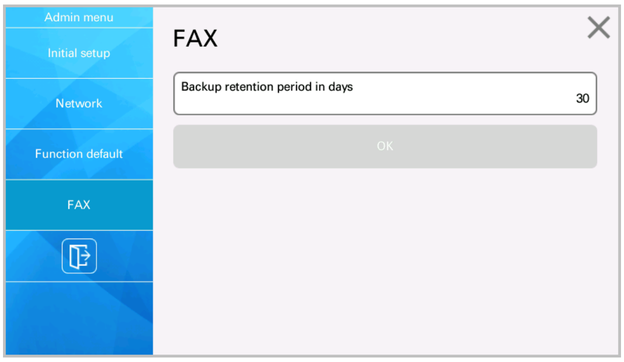
When finished, select the Exit icon to close the Admin window.



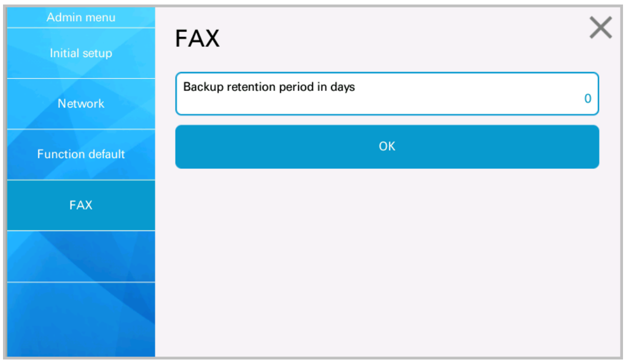
FAX tab

The FAX tab displays on the Admin menu if the device is for **Japan** or the **Americas**, has a FAX board, and the "Initial setup" process has finished.

1 Select the **FAX** tab.



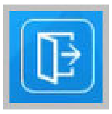
2 To change the number of days for the backup retention period, select **Backup retention period in days**.



a) Set a value between 0 and 30 days.

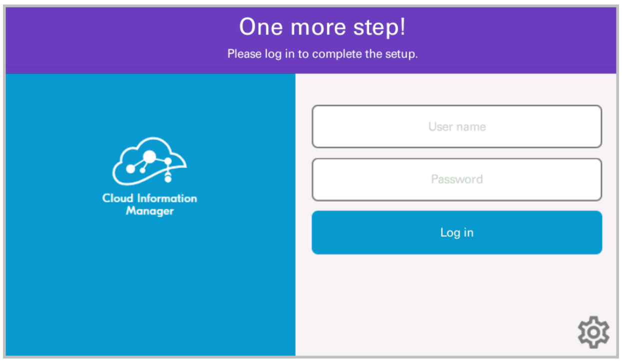
b) Select **OK**.

3 Select the Exit icon to close the window.



The "One more step!" window displays.

4 On the "One more step!" window perform the following:

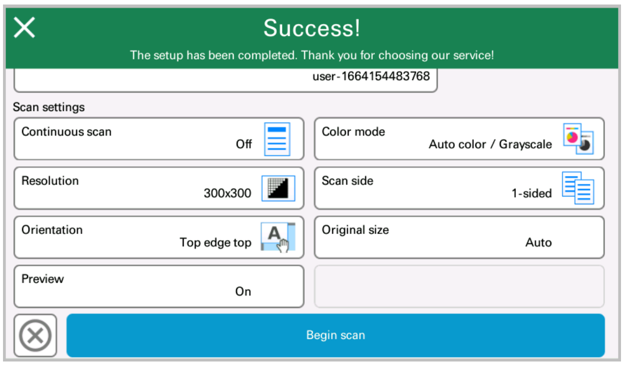


a) Select **User name** and enter your KCIM user name.

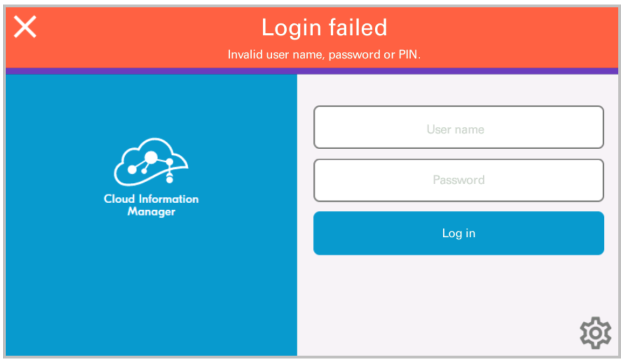
b) Select **Password** and enter your KCIM password.

c) Select **Log in**.

5 If "Success!" displays, the connection from the MFP client application to KCIM was made. Select **X** to close the window

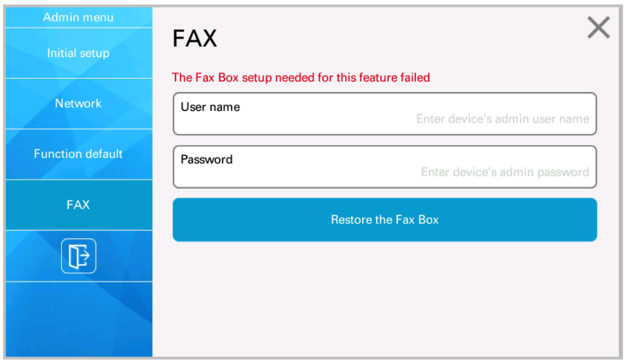


6 If "Login failed" displays, retry entering your KCIM User name and Password and selecting **Login** again.



If "Login failed" displays again, make sure your KCIM login credentials are correct and try logging in again.

7 If there is a problem with the Cloud Information Manager Fax Box setup, an error displays



a) Select **User name** and enter the MFP's Admin-level user name. The User name is a local user.

b) Select **OK**.

c) Select **Password** and enter the password for the user name you entered.

d) Select **OK**.

e) Select **Restore the Fax Box**.

The MFP attempts to restore the Cloud Information Manager Fax Box.

f) After restoring the Fax Box, the device returns to the login page. See the *Fax forwarding* topic for more information if the Fax Box is not restored.

> After restoring, you must select the newly created Cloud Information Manager Fax Box as the destination.

After a successful setup, the device will forward any received faxes to KCIM.

FAX forwarding

The KCIM MFP client application prepares the following Fax Box at startup.

- **Box Name**: Cloud Information Manager
- **Box Password**: CIM#1478
- **Box Owner**: None

If the "RX/Forward Rules" are set up on the MPF, which is an MFP's native feature, to save fax images into the Cloud Information Fax Box, the KCIM MFP client application uploads each received fax image in the Cloud Information Manager Fax Box to KCIM. Fax images sent to KCIM appear in the "Documents to index" area of the Dashboard.

Fax image upload

KCIM MFP client application checks the Cloud Information Manager Fax Box when any of the following events occur:

- The completion of a FAX to Box job
- KCIM MFP client application start up
- The **Information Manager** icon is selected on the device panel
- The **OK/Restore the Fax Box** button on the FAX tab is selected
- A 15 min interval has elapsed

> This only happens if there isn't a "The Fax Box setup needed for this feature failed" error and some fax images remain in the Fax Box.

For any of the events listed above, the KCIM MFP client application tries to upload fax images with a file name not starting with BAK_.

If the upload completes successfully, the KCIM MFP client application renames uploaded images with a file name starting with BAK_.

As mentioned, file names beginning with BAK_ are used by the KCIM transfer function. Do not set a file name beginning with BAK_ in the file for fax transmission because it may be deleted without being transferred to KCIM. See the **System** > **Fax** documentation for your target device for information about setting the file name when transferring faxes.

Upload failure and retry

The uploading of faxes can fail if any of the following events occur:

- Network trouble
- Server trouble or maintenance work
- Setup/activation incomplete (Refer to **Login** > **Activation**)
- License/subscription issue

The upload is retried every 15 minutes if any of the listed events occur.

Fax image backup retention

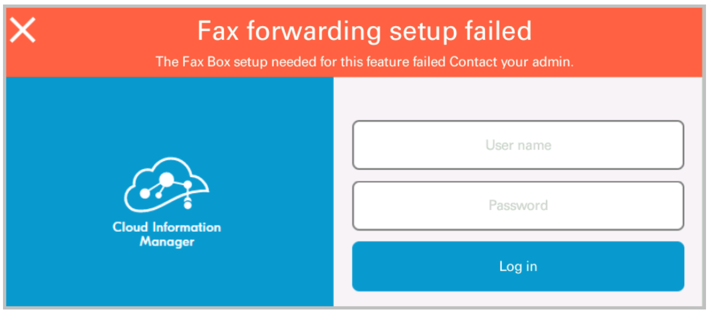
A fax image with a file name starting with BAK_ is considered a backup image. Fax images starting with BAK_ are kept for the period indicated in the "Backup retention period in days" setting on the **FAX** tab on the **Admin** menu.

If the image's creation date is older than the set retention period compared to the current date and time, the fax image is removed from the Fax Box. (Delete all BAK_ FAX images if the creation-date + retention-period < now.)

Deletion is triggered using the same events listed in the *Fax image upload* topic.

Fax Box preparation error and error solutions

If the "Fax forwarding setup failed" error displays on the Log in screen, the KCIM MFP client application couldn't access or create the Fax Box.



The table below lists some possible causes for the error message.

Error cause	Solution
The device is not connected to the network.	Connect to the network and restart the device.
The "Enhanced WSD over SSL" setting is disabled.	Enable the setting and restart the device.
The device's default Admin is removed or changed.	Access the **FAX** tab on the **Admin** menu, enter a valid Admin credential and then select **Restore the Fax Box**.

Error cause	Solution
The "Cloud Information Manager" Fax Box was modified or removed.	Reverse any modifications to Box Name, Box Number, Box Password, and Box Owner. If you reverse the modifications,they will be returned to: **Box Name**="Cloud Information Manager", **Box Number**=(original value), **Box Owner**=No Owner, **Box Password**=CIM#1478. If you cannot reverse any of the modifications, access the **FAX** tab on the **Admin** menu, enter a valid Admin credential and then select **Restore the Fax Box**.

How the "Restore the Fax Box" feature works

When **Restore the Fax Box** is selected, the KCIM MFP client application does the following:

- Look for Fax Boxes named "Cloud Information Manager" and select the first accessible Fax Box.
- If there are no accessible Fax Boxes, **Restore the Fax Box** creates a new Fax Box named "Cloud Information Manager."

This restore process could take a few minutes to complete.

10 Appendix

Document classes and Attributes

The "Document classes" and "Attributes" areas of the "Schema" tab let you manage document classes and attributes associated with your organization. If you plan on making many changes to the document classes and attributes, you should do this before letting users add documents to KCIM.

Document classes or attributes that are in use cannot be deleted. Attributes that are in use cannot be edited.

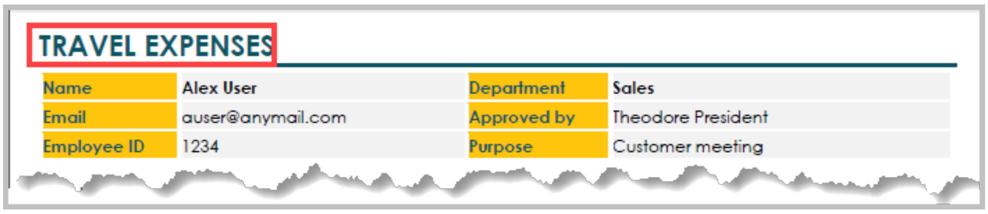
Use caution when adding, editing, or deleting any document classes or attributes. If you are not familiar with the process, contact your dealer for help. Making changes to document classes and attributes cannot be undone and may cause issues with documents already uploaded to KCIM.

Configure KCIM document classes and attributes for your organization

If your organization is satisfied with the default KCIM document classes and attributes, you can skip this section. Otherwise, read these topics carefully and plan out what document classes and attribute changes your organization wants.

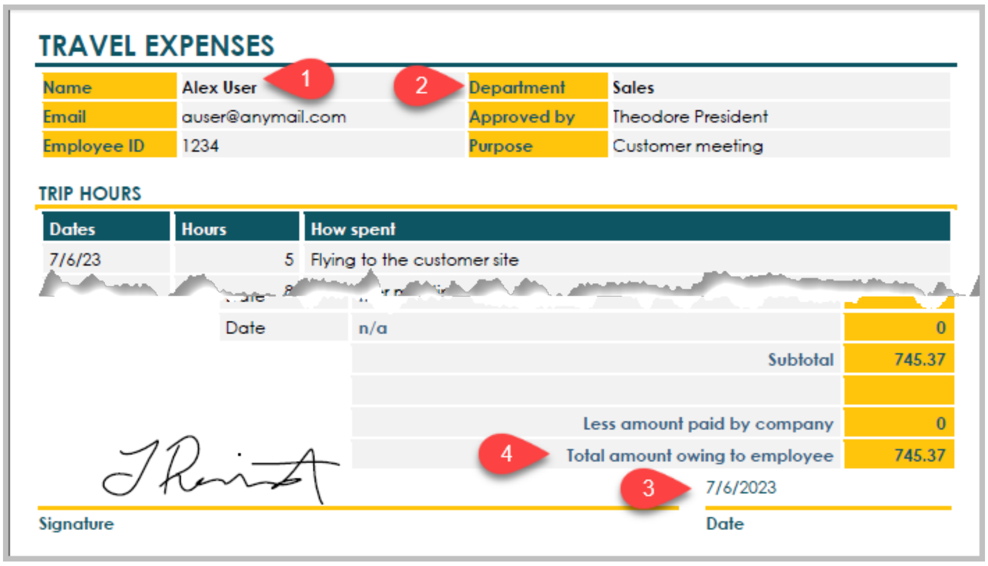
Avoid updating an organization’s document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

- **Document classes** are used to classify documents added to KCIM. An example of a document class is "Expense report." You would use the "Expense report" document class to classify travel expenses from an employee in your company.



You add a new document class when none of the default document classes satisfy the needs of your organization. Read *The default KCIM document classes* topic to understand how many document classes you can add to your organization.

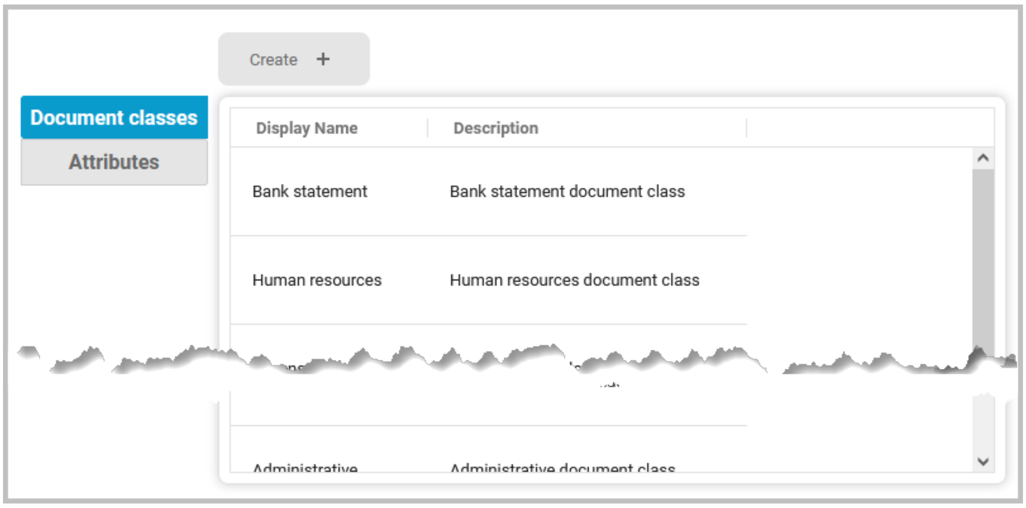
- **Attributes** are associated with document classes and contain data about the document being classified. For example, attributes associated with the "Expense report" document class include the name of the employee incurring the expense (1), the employee's department (2), the date the expense was incurred (3), and the amount of the expense (4).



You can add attributes to the "Expense report" document class if you wanted to capture more information for indexing purposes. Read *The default KCIM document classes* topic to understand how many attributes you can add to your organization.

Document classes

On the **Settings** tab, select **Schema** > **Document classes** to view the currently available document classes.



The default KCIM document classes

The 7 default document classes for Kyocera Cloud Information Manager are:

- Administrative
- Bank statement
- Business card
- Contract
- Expense report
- Human resources
- Invoice

A complete list of the default KCIM document classes are available in the *Appendix*. See the *Attributes, data types, and values per document class* topic.

If your organization requires changes to the default document classes, requires a new document class, or requires changes to the attributes for a document class, see the following configuration topics:

- *Add a new KCIM document class*
- *Edit a KCIM document class and associated attributes*
- *Delete a KCIM document class*
- *Add KCIM attributes*
- *Edit KCIM attributes*

Add a new KCIM document class

You can add document classes to your Kyocera Cloud Information Manager organization.

To speed up creating a new document class, you may want to collect the information you need about the document class name and the attributes you want to include in the document class. If the attributes do not exist in KCIM, you may want to add them to KCIM first to have them available when creating the new document class.

Avoid updating your organization's document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

For your organization, there is a limit to how many document classes and attributes can be added:

- **Maximum number of document classes**: 50 total
  - 7 Default classes
  - 43 Custom classes
- **Maximum number of attributes**: 245 total
  - 119 String (Default 19, Custom 100)
  - 32 Decimal (Default 2, Custom 30)
  - 34 Date (Default 4, Custom 30)
  - 30 Boolean (Custom 30)
  - 30 Integer (Custom 30)

1 Open your browser and log in to your Customer Portal account.

If you are already in KCIM, select the **Settings** icon and skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
Kyocera Cloud Information Manager opens.

3 Select **Schema**.
The current document classes list displays.

4 Select **Create +**.
The "Create document class" window displays.

5 Enter "Document class name" that is 64 characters maximum.

Accepted characters: UTF-8 except \ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

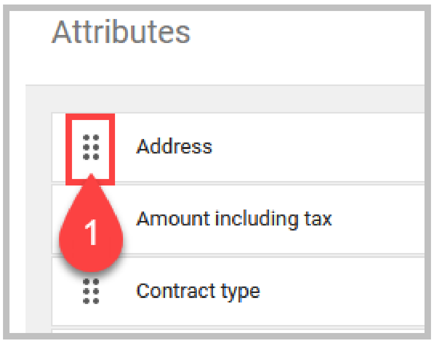
6 (Optional) Add or edit the description. Maximum length is 256 characters.

Accepted characters: UTF-8 except \ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

7 Next, add the attributes for the new document class. Select **+ Add attributes**.

8 When finished, click **Select**. If you forgot to add attributes, select **+ Add attributes** again to add them.

9 When a user enters the information for the attributes for the new document class in KCIM, the attributes appear in the order shown in the Attributes area. Rearrange the order of the attributes in the list by selecting the handle next to the attribute (1) and moving the attribute to the correct location.



10 Select **Submit**.
The Document classes window refreshes and displays the Name, Description, and Attributes for the new document class.

11 After adding a new document class, the Customer Admin for the organization must add read, write, and delete permissions for the new document class to any user profiles that require the new document class.

Users are not automatically granted permissions to access new document classes.

For example, if a new document class named "Purchase order" was added, the new document class is not available to any users. The Customer Admin must add permissions for "Purchase order" to users that want to access the new document class.

On the Settings pane, select **Document class permissions** and add permissions for the users that need to use the new document class.

Edit a KCIM document class and associated attributes

You can edit a KCIM document class and the attributes associated with the document class.

> Avoid updating your organization's document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

1. Open your browser and log in to your Customer Portal account.

   > If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens.

3. Select **Schema**. The current document classes list displays on the right of the pane.

4. From the list, select the document class you want to edit.
   The "Document class name," "Description," and "Attributes" for the selected document class display.

5. Select the pencil icon next to "Document class name" or "Description" to edit these items. Select **Submit** to save the changes.
   A message displays that the document class was successfully updated.

6. If you want to edit an attribute, select the pencil icon next to "Attributes" to edit any of the attributes associated with the document class. Select **Done** to save the changes.

   > You can add new or remove unwanted attributes as long as the document class has not already been used by anyone in your organization.

   > See the *Attributes, data types, and values per document class* tables in the *Appendix* chapter for information on available attributes and field lengths.

   A message displays that the document class was successfully updated.

Delete a KCIM document class

Based on your organization's requirements, you can delete any unneeded document classes from the Schema. For example, if your organization does not ever use the "Bank statement" document class, it can be removed so it does not appear as a choice when users are indexing uploaded files.

Use caution when deleting any document classes or attributes. If you are not familiar with the process, contact your dealer for help. Making changes to document classes and attributes cannot be undone and may cause issues with documents already uploaded to KCIM.

Avoid updating your organization’s document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

You cannot delete a document class if it is in use already.

1. Open your browser and log in to your Customer Portal account.

   If you are already in KCIM, select the **Settings** icon and skip to step 3.

2. In the Kyocera Cloud Information Manager tile, select **Manage Settings**.
   Kyocera Cloud Information Manager opens.

3. Select **Schema**. The current document classes list displays on the right of the pane.

4. From the list, select the document class to delete.
   The properties of the selected document class display.

5. Select the **Delete** icon.
   A dialog displays. Make sure that this is the correct document class to delete.

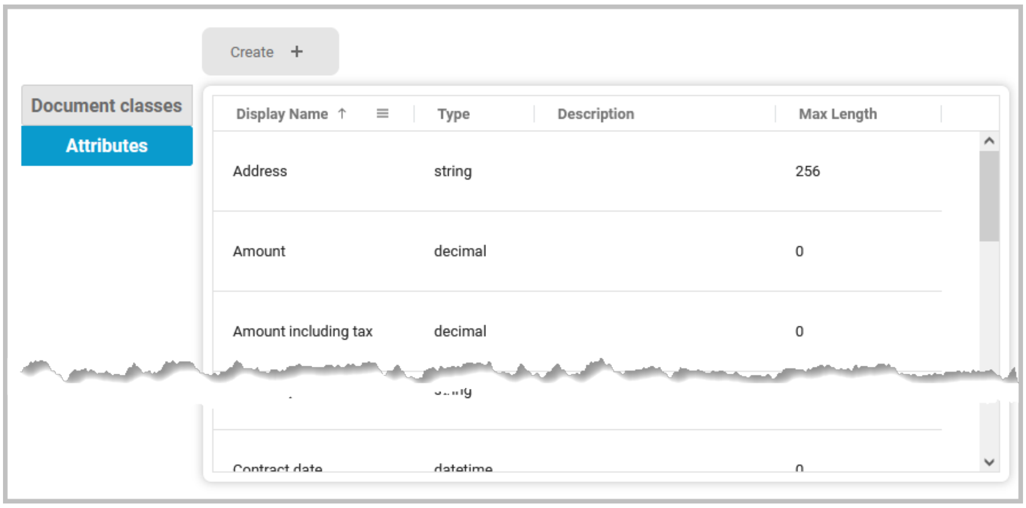
   You cannot undo a document class deletion.

6. Select **OK**.
   A message displays that the document class is deleted. The list refreshes after the deletion.

7. Select another document class to delete or make a selection from the navigation pane to exit Settings.

Attributes

On the **Settings** tab, select **Schema** > **Attributes** to view the currently available attributes.



About KCIM attributes

An attribute is a classification element applied to objects such as documents, files, and images. Attributes are added to a document class to support the processing and routing of objects. Examples of attributes are amount, date, employee name, description, and address.

Attributes are included in indexing to make information easier to find, delegate, process, and approve.

For **each** Customer organization/tenant, there is a limit to how many document classes and attributes can be added:

- **Maximum number of document classes**: 50 total
  - 7 Default classes
  - 43 Custom classes
- **Maximum number of attributes**: 245 total
  - 119 String (Default 19, Custom 100)
  - 32 Decimal (Default 2, Custom 30)
  - 34 Date (Default 4, Custom 30)
  - 30 Boolean (Custom 30)
  - 30 Integer (Custom 30)

- Newly created attributes (or custom attributes) can be **edited** only if the attribute is not assigned to a document class.
- Newly created attributes (or custom attributes) can be **unassigned** only if the organization is not using the document class that this attribute is assigned to.

Add KCIM attributes

You can add attributes to your Kyocera Cloud Information Manager organization.

Avoid updating your organization’s document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

1 Open your browser and log in to your Customer Portal account.

> If you are already in KCIM, select the **Settings** icon and skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens.

3 Select **Schema**. The current document classes list displays on the right of the pane.

4 Select **Attributes**.
A list of current attributes display.

5 Select **Create +**.
The "Create attribute" window displays.

> For your organization, there is a limit to how many document classes and attributes can be added.
>
> - **Maximum number of document classes**: 50 total
>   - 7 Default classes
>   - 43 Custom classes
> - **Maximum number of attributes**: 245 total
>   - 119 String (Default 19, Custom 100)
>   - 32 Decimal (Default 2, Custom 30)
>   - 34 Date (Default 4, Custom 30)
>   - 30 Boolean (Custom 30)
>   - 30 Integer (Custom 30)

6 Add the following information for the new attribute:

a) **Attribute name**: Attribute name must be unique. 128 characters maximum.

Accepted characters: All UTF-8 except:

\ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

b) **Description**: Enter a description for the attribute. 256 characters maximum.

Accepted characters: All UTF-8 except:

\ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

c) **Type**: Select one of the following attribute Type options:

- **String**: Applies to numbers and letters. 256 characters maximum.
- **Boolean**: Includes a Boolean value, true or false.
- **Date**: Includes the date.
- **Integer**: Applies to whole numbers.
- **Decimal**: Applies to double type.

d) Select **Submit**.

The Attributes window refreshes. Select the new attribute to see the Attribute name, Description, Type, and Max length of the attribute. You can sort the Attribute list by selecting a header.

7 Continue adding any required attributes for your organization's document classes.

8 When finished adding attributes, go back to **Document classes** and add any newly-added attributes to their associated document class. See the *Add a new KCIM document class* topic for information.

Edit KCIM attributes

You can edit Kyocera Cloud Information Manager attributes that you have created, but note the following:

- Newly created attributes can be edited only if the attribute is not assigned to a document class.
- Newly created attributes can be **unassigned** only if your organization is not using the document class that this attribute is assigned to. Make sure that the attribute is correct.
- Avoid updating your organization’s document classes or attributes when users are logged in. Any logged-in users can only see document class or attribute updates after they log out and log in again.

1 Open your browser and log in to your Customer Portal account.

> If you are already in KCIM, select the **Settings** icon and skip to step 3.

2 In the Kyocera Cloud Information Manager tile, select **Manage Settings**. Kyocera Cloud Information Manager opens.

3 Select **Schema**.
The current document classes list displays.

4 Select **Attributes**.
The current attributes list displays.

5 Select a newly created attribute and then select **Edit**.

6 Edit the attribute information. The **Attribute Name** and **Type** are required.

> See the *Attributes, data types, and values per document class* tables in the *Appendix* chapter for information on available attributes and field lengths.

a) **Attribute Name**: Attribute name must be unique. 128 characters maximum. Accepted characters: All UTF-8 except:

\ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

b) **Description**: Enter a description for the attribute. 256 characters maximum.

Accepted characters: All UTF-8 except:

\ / : , ; * ? " < > | [ ] { } ! @ # $ % ^ ` ~ & ' . ( ) _ + =

c) **Type**: Select one of the following attribute Type options:

- **String**: Applies to numbers and letters. 256 characters maximum.
- **Boolean**: Includes a Boolean value, true or false.
- **Date**: Includes the date.
- **Integer**: Applies to whole numbers.
- **Decimal**: Applies to double type.

d) Select **Submit**.
The Attributes window refreshes. Select the new attribute to see the Attribute name, Description, Type, and Max length of the attribute. You can sort the Attributes list by selecting a header.

7 When finished editing attributes, go back to **Document classes** and add any newly-added attributes to their associated document class.

Attributes, data types, and values per document class

The following tables list the attribute names, types, and values for the default KCIM document classes.

Data types and values for Invoice, Human Resources, Contract, and Bank statement (Part 1)

Attribute Name (total=25)	Type	Values	Invoice	Human Resources	Contract	Bank statement
Customer name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	✓	-	-	-
Issue date	Date format	N/A	✓	-	-	-
Due date	Date format	N/A	✓	-	-	-
Amount	Numeric	No max	✓	-	-	-
VAT	Numeric String	No max	✓	-	-	-
Amount including tax	Numeric	No max	✓	-	-	-
Address	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	✓	-	-	✓
First name	Free Text	Max: 256 chars	-	✓	-	-
Last name	Free Text	Max: 256 chars	-	✓	-	-
Description	Free Text	Max: 256 chars	-	✓	-	-
Email address	Email	Valid Email	-	✓	-	-

Data types and values for Invoice, Human Resources, Contract, and Bank statement (Part 2)						
Attribute Name (total=25)	**Type**	**Values**	**Invoice**	**Human Re-sources**	**Contract**	**Bank state-ment**
Contract name	Free Text	Max: 256 chars	-	-	✓	-
Contract type	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 128 chars	-	-	✓	-
Contract number	Numeric	Max: 128 chars	-	-	✓	-
Contract date	Date	Valid data	-	-	✓	-
Bank Name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	✓
Document name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	-
Date	Date	Date	-	-	-	-

Data types and values for Invoice, Human Resources, Contract, and Bank statement (Part 3)						
Attribute Name (total=25)	**Type**	**Values**	**Invoice**	**Human Re-sources**	**Contract**	**Bank state-ment**
Name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	-
Company name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	-
Position	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 128 chars	-	-	-	-
Phone number	Number	No max	-	-	-	-
Cell number	Number	No max	-	-	-	-
Employee name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	-
Department name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-	-

Data types and values for Administrative, Business card, and Expense report (Part 1)					
Attribute Name (total=25)	**Type**	**Values**	**Administrative**	**Business card**	**Expense report**
Customer name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-
Issue date	Date format	N/A	-	-	-
Due date	Date format	N/A	-	-	-
Amount	Numeric	No max	-	-	✓
VAT	Numeric String	No max	-	-	-
Amount includ-ing tax	Numeric	No max	-	-	-
Address	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	✓	-
First name	Free Text	Max: 256 chars	-	-	-
Last name	Free Text	Max: 256 chars	-	-	-
Description	Free Text	Max: 256 chars	✓	-	-
Email address	Email	Valid Email	-	✓	-

Data types and values for Administrative, Business card, and Expense report (Part 2)

Attribute Name (total=25)	Type	Values	Administrative	Business card	Expense report
Contract name	Free Text	Max: 256 chars	-	-	-
Contract type	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 128 chars	-	-	-
Contract number	Numeric	Max: 128 chars	-	-	-
Contract date	Date	Valid data	-	-	-
Bank Name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	-
Document name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	✓	-	-
Date	Date	Date	✓		✓

Data types and values for Administrative, Business card, and Expense report (Part 3)					
Attribute Name (total=25)	**Type**	**Values**	**Administrative**	**Business card**	**Expense report**
Name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	✓	-
Company name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	✓	-
Position	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 128 chars	-	✓	-
Phone number	Number	No max	-	✓	-
Cell number	Number	No max	-	✓	-
Employee name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	✓
Department name	Alphanumeric (English letters and numbers) space and dash "-" allowed	Max: 256 chars	-	-	✓

System email

Subscription-based emails

Kyocera Cloud Information Manager Customer Admins receive emails when certain system events occur.

Type	Event email	When the email is sent
Start subscription	Subscription is ready	When a subscription is created for an organization for any plan.
Usage quota: % of quota used	**Free plans**: Usage at X%	An email is sent when the quota reaches 70%, 80%, and 90%. This quota monitors the uploaded data usage in MB. If your organization reaches 100% of its quota, users can no longer upload documents. Users can delete uploaded documents to bring the quota below 100%.
	Paid plans: Usage at X%	An email is sent when the quota reaches 70%, 80%, and 90%. This quota monitors the uploaded data usage in GB. If your organization reaches 100% of its subscription quota, the subscription fee and the quota are updated when the usage exceeds the upper limit. Users can delete uploaded documents to reduce the quota below 100%.
The quota has reached 100%.	**Free plans**: Upload disabled.	A subscription must be purchased, or users must delete enough uploaded documents to reduce the quota below 100%. Uploads are disabled.
	Paid plans: Tier has been updated.	The subscription fee and the quota are updated when the usage exceeds the upper limit.

Type	Event email	When the email is sent
Subscription canceled	Unsubscribed	An unsubscribed email is sent on the day of deletion if you request cancellation of the subscription. All documents associated with your organization and your organization's portal are deleted on the last day of the billing cycle.

Device communication error codes

Any error codes you may see when setting up the KCIM MFP client application are in two parts:

- The **Result code**, which represents result of an API call for the connection test.
- The **Error message**, which supplies additional information about the Result code.

Below is a list of possible error codes and their associated messages.

Result code	Error reporter	Description
404	KCIM server	The Organization name might be wrong.
407	Proxy server	You need to provide valid proxy credentials.
Other 3-digit numbers	KCIM server or Proxy server	Check HTTP response status codes.
CONNECT_TIMEOUT_E, CONNECT_E, IO_E	Communication libraries	The connection timed out and could not reach a server. Domain name or proxy settings might be wrong or the network has an issue. You can take the result code IO_E with an error message "TIMEOUT ERROR" for a timeout error.
SSLPEER_UNVERIFIED_E	Communication libraries	You need to install a valid SSL certificate in the MFP from HyPAS Device Online. See the guide for the device for more information.
UNKNOWN_HOST_E	Communication libraries	Could not resolve the host name. Review the MFP's network settings or its environment.

Result code	Error reporter	Description
Other	Communication libraries or Java(FW)	Could not reach a server properly. Each code corresponds with Java exception class name. When you see SOCKET_E, it corresponds with SocketException class. UNKNOWN_HOST_E for UnknownHostException class, and so on.

For the KYOCERA contact in your region, see Sales Sites sections here
ご利用の地域でのお問い合わせ先については、下記リンクから京セラ本支店・営業所の一覧をご覧ください。
https://www.kyoceradocumentsolutions.com/company/directory.html