Kyocera Cloud Information Manager

User Guide

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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 User Guide (This guide)	This guide provides information about Kyocera Cloud Information Manager (KCIM) for end-users. It contains instructions on how to activate a user account and effectively use KCIM.

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 use Kyocera Cloud Information Manager as a user.

> 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 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 (KCIM).
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 account settings.
4. **Dashboard**: Describes the KCIM Dashboard, and how to upload and index documents.
5. **Search**: Describes how use and configure the search feature, and how to use the advanced search features.
6. **Folders**: Describes how to add and manage folders and manage documents. Document management includes viewing document properties and history, editing Microsoft 365 documents, comparing document versions, creating tasks, requesting retention and signatures.
7. **Processes**: Describes how to monitor and manage your running and completed task processes.
8. **Using an MFP with KCIM**: Describes how to using the KCIM MFP client application on a multi-function printer.
9. **Mobile application**: Describes how to use the KCIM mobile application to take photos of your documents and upload them to KCIM.
10. **Appendix**: Describes additional information about KCIM.

About the Customer Portal

The Customer Portal is used by your organization to manage Customer Portal applications and to provide you access to applications they make available to you.

- 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 for users

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

- **Applications**: Launch applications your organization makes available to you.
- **My Profile**: Manage your Customer Portal profile, which is shared by all Customer Portal applications.

About Kyocera Cloud Information Manager

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

Log into your Customer Portal account to launch KCIM and other applications your organization has made available to you. Use the Customer Portal to view and edit your Profile.

Kyocera Cloud Information Manager key features

User key features

The Customer admin also has access to these features.

Using the KCIM web portal, you 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
  - 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.
  - Request that documents be archived. This feature only displays if Retention Management has been activated.
  - Request that documents be signed
- **Processes**
  - View and manage task processes created by you

Using the KCIM mobile application, you can access the following features:

- Upload documents to Kyocera Cloud Information Manager (KCIM)

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

- Scan and upload documents to KCIM

- If your Customer Admin sets 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 login page and follow the instructions to create a new password.

3 Getting started

This chapter describes setting up and managing your Kyocera Cloud Information Manager (KCIM) account.

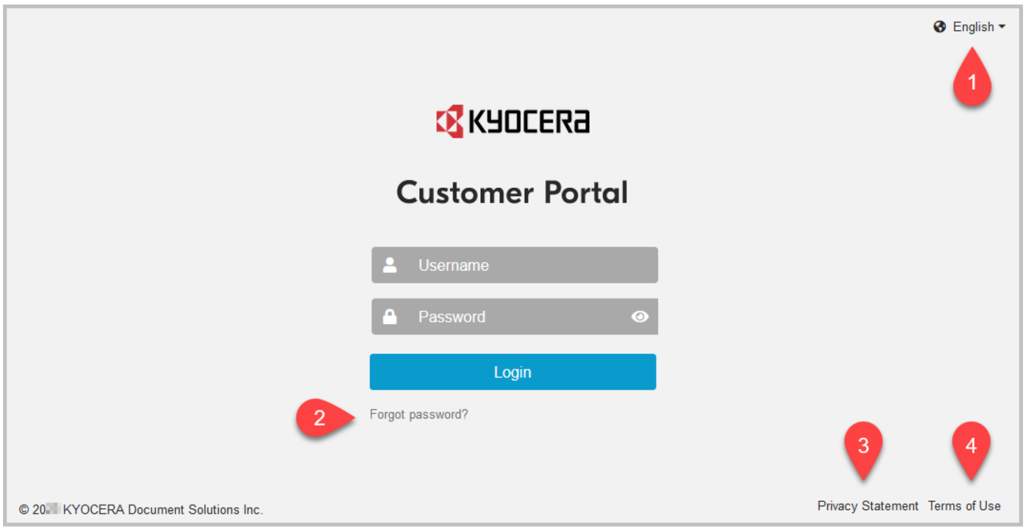
Your Customer Portal admin creates an account for you and sends you an activation email.

- Before using your KCIM account, you need to activate and log in to your Customer Portal account.
- 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.
- (Optional) After activating your account, you can download the Kyocera Cloud Information Manager Mobile application from the Apple or Google store so you can take photographs of documents to upload to KCIM.

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.

- All KCIM users are provided an account on the Customer Portal. The Customer Portal is the application launcher used for KCIM and any other applications your organization makes available to you.
- 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 Customer Portal provider.

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**.
   Your user profile information displays.
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**.

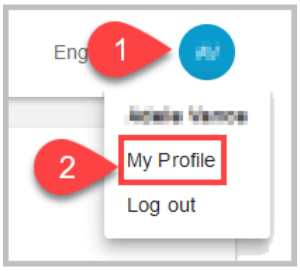
After a successful log in, the KCIM Dashboard displays.

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 or select another tab to change those settings.

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.

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.

View your Kyocera Cloud Information Manager settings

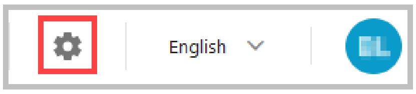
After you log in to your KCIM account, you can view your settings at any time:

- **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.
- **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 4.

2. In the Kyocera Cloud Information Manager tile, select **Launch App**. Kyocera Cloud Information Manager opens.
3. Select the **Settings** icon.

4. Select any tab to see the current settings for that tab.
5. Select any item from the navigation pane to close the Settings pane.

Edit your Kyocera Cloud Information Manager settings

After you log in to your account, you can edit your settings at any time to change these items:

- Display

Display

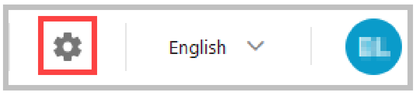
Use the settings on this tab to change the dark or light user interface modes and accent color on the user interface.

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 4.

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

3. Select the **Settings** icon.

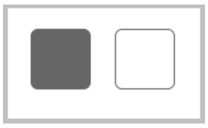
   

   The **Settings** pane displays.

4. Select **Display**.

5. To change the mode:

   a) In the "Dark mode" area, select the dark or light icon.

   The user interface updates to display your choice.

6. 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.

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

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.

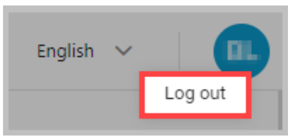
Log out of your account

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**.



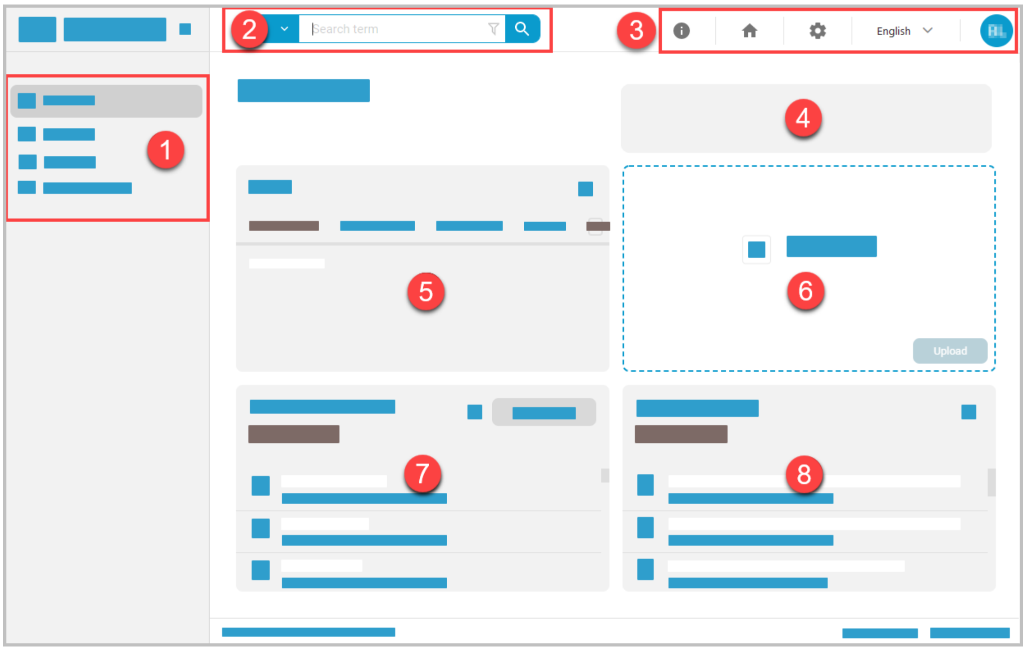
2 Close the browser window.

4 Dashboard

The Kyocera Cloud Information Manager (KCIM) Dashboard displays when you log in.

This chapter provides an overview of the Dashboard. For information on the Search bar or other KCIM features available on the navigation pane, see the applicable chapter in this guide.

- The **navigation pane (1)** provides access to these KCIM features:
  - Dashboard
  - Folders
  - Processes
  - 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.

Depending on a security setting made by your KCIM admin, you may or may not see the "Created by me" check box. See the *Documents to index* topic for more information about the "Created by me" check box.

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 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, check with your Provider.

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.

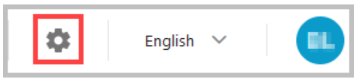
Contact your Customer Admin if you have any questions about subscription limits and the overage charges that apply to your organization's subscription account.

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.

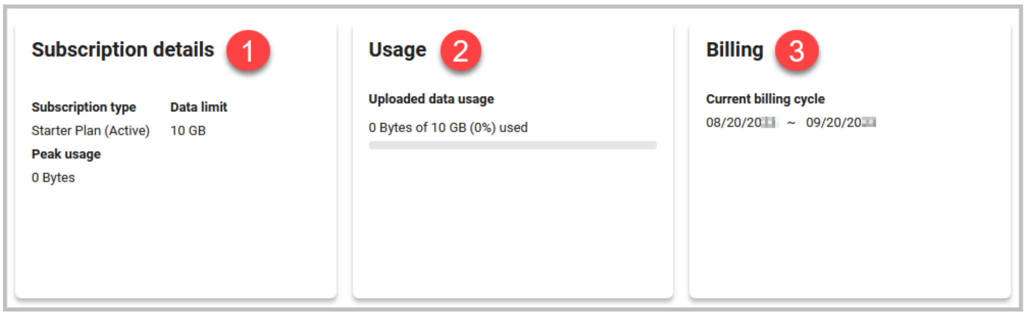
Settings pane subscription information

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



The Settings pane defaults to the **Plan** tab.

The following information displays on the tab:



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.

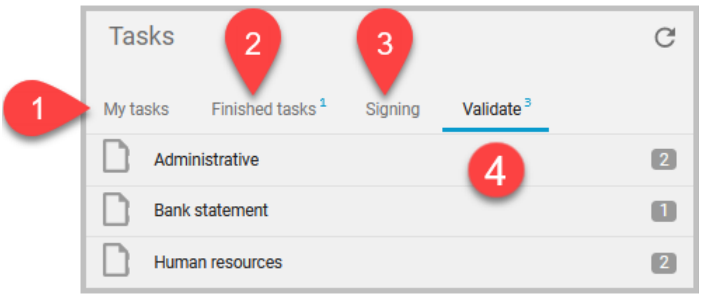
Billing (3)

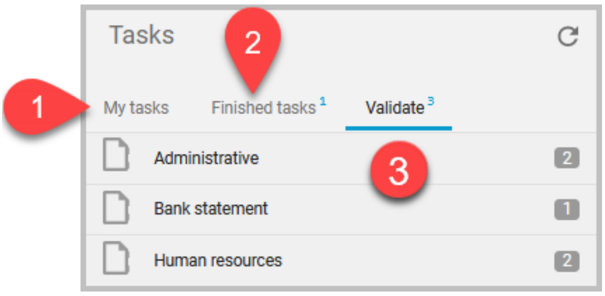
- **Current billing cycle**: The dates shown are the current billing cycle.

If you have questions about your organization's plan, contact your KCIM Admin.

Tasks

On the Dashboard, the Tasks area is your "inbox" that notifies you if there are tasks for you to perform. After the tab name, any tab with a number indicates the number of tasks available.





My tasks (1)

Tasks assigned to you or that you assigned to yourself display on the **My tasks** tab. See the *My tasks* topic for more information.

Finished tasks (2)

Tasks that have been completed display in the **Finished tasks** tab. See the *Finished tasks* topic for more information.

Signing (3)

If you have asked other users to sign documents, the documents that are in the process of being signed display on the **Signing** tab.

Validate (4)

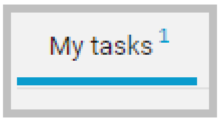
Documents that you or others have requested be validated display in the **Validate** tab. All users with access rights to the same document class are also notified that these documents are available. Each listed document class also indicates how many validation tasks are waiting.

My tasks

The **My tasks** tab lists your received tasks. These tasks can be those you assigned to yourself or from other users. A task may be for just you, which is a **Single task**. A task may be for multiple users, which is a **Task sequence**, where each user completes their part of the task and passes the task to the next recipient in sequence.

See the *Create task(s)* topic in the *Folders* chapter for information on creating a Single task or Task sequence.

1. In the **Tasks** area on the Dashboard, select the **My tasks** tab. The number indicates how many tasks are waiting.



If a task displays a date, that is the due date for the task. If the date is red, the task is overdue.

2. Select a task from the list. Each task displays an icon.

Single task: A task that is just for you displays this icon:

Task sequence: A task that is part of a sequence where two or more users are requested to do something with a document display this icon:

A window containing the task, process history, notes, comments, and information about the document associated with the task displays.

3 Act on the task request. See the *About received task requests* topic for information about the components that make up a received task.

4 **Single task**: If you want someone else to act on the task request, select **Forward**.

a) In the "Forward task to" window, enter the recipient of the task, any notes you want to recipient to see and select a due date.

b) Select **Include original message** if you want the recipient to see the original message associated with the task.

c) Enter a Note that the recipient sees.

d) Select **+** to add any attachments you want the recipient to receive.

e) Select **Forward**.

5 **Task sequence**: If you want someone else to act on the task request, you cannot forward the task to another user in a Task sequence as you can for "Single task." However, you can create a new task in the sequence and add a user to the new task.

This procedure also works if you have forgotten a task and want to add it to the sequence.

a) Open the task.

b) At the top of the Task list, select **+**.

c) Add the Task, Recipient, and due date for the new task and select **Add**.

d) Move the task to be next in the sequence. You may have to adjust the due dates in the Task list to make sure they follow the sequence.

e) Select **Pass to next recipient**.

6 When you have finished the task:

a) **Single task**: Select **Finish task**.

b) **Task sequence**: Select **Pass to the next recipient**. If you are the last user in the sequence, select **Finish**.

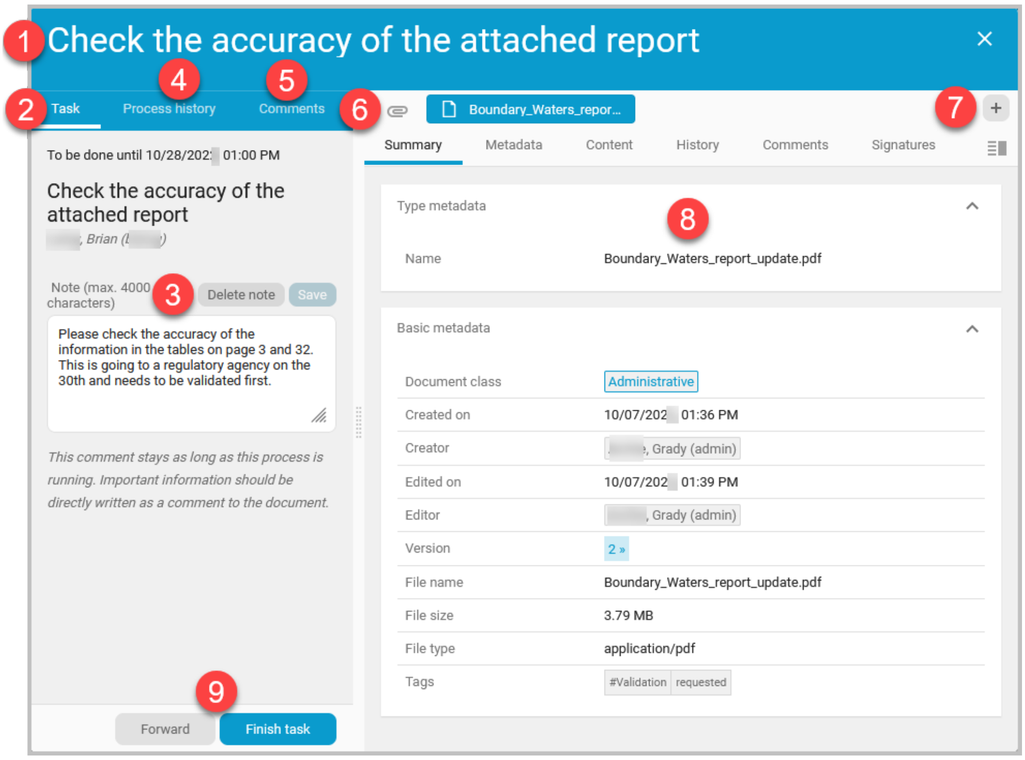
After finishing or passing a task, the task is removed from your **My tasks** list.

About received task requests

Single task

Below is an example of a Single task request. You can tell it is just for you because there isn't a Task list of people involved with the task.

When you open a task, if you see a red border, there was a date associated with the task, and the task is now overdue.



Title (1)

The title of the task. It should contain information that allows you to act on the task request.

Task (2)

The Task tab contains a repeat of the task title, the date and time the task is due, the originator of the task, and a Note area (3) that provides additional information from the originator of the task.

You can delete the note or make additions or edits to the note. If you make any changes to the note, select **Save**. When the task is finished, this note is removed. If you want to make a permanent note about a document, select the **Comments** tab for the document and add a note there.

Process history (4)

Select the **Process history** tab to see the history of the task you currently have open.

Comments (5)

Users assigned the task can add comments about the task by selecting the Comments tab and adding text. These comments are retained after the task is complete.

Attachments (6)

The Attachments area lists documents attached to this task request. If there is only one document attached, the document is automatically selected, and the metadata for that document displays. If there is more than one document attached, select the document to view that document's metadata.

+ Add attachments (7)

Attachments can be added to the task. Select **+** and browse for the attachment. Documents you want to attach must already be uploaded to KCIM.

Summary, Metadata, Content, History, Comments, Signatures (8)

These tabs display information about the selected document. See the *View file properties* topic in the *Folders* chapter for a more detailed description of each tab.

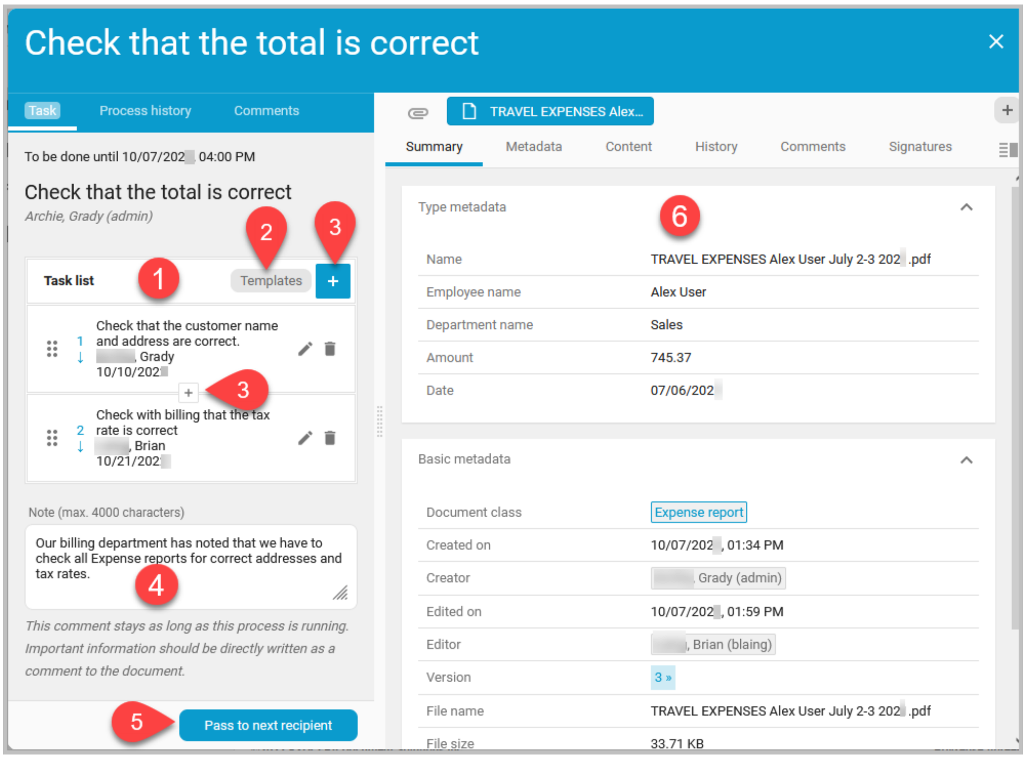
Forward / Finish task (9)

If you want another user to take this task, select Forward and enter the information requested. If you have completed the task, select **Finish task**. After selecting Finish task, the task is removed from your My tasks list.

Task sequence

Below is an example of a Task sequence. A Task sequence shares many of the same features as a Single task with the following differences.

When you open a task, if you see a red border, there was a date associated with the task, and the task is now overdue.



Task list (1)

A Task sequence contains a Task list that defines the users associated with the task and the order in which the task is done.

Templates (2)

Select if you want to apply a Task sequence template to add additional users to the task list. See the *Apply a Task sequence template* topic in the Folders chapter for more information.

+ Add new recipient (3)

You can add users to the task sequence, reorder the task sequence, and add a user between two existing users in the task list.

Note (4)

In a Task sequence, the task title is supposed to indicate what you should do. Use the Note field to add comments that all other recipients can view. Comments added to the Note field are only available as long as the Task is still running.

Pass to next recipient / Finish (5)

After finishing your portion of the task, select **Pass to next recipient**. If you are the last person on the task list, select **Finish**.

+ Add attachments, Summary, Metadata, Content, History, Comments, Signature (6)

These items are identical to those in a Single task. See *About received tasks: Single task* for more information.

Finished tasks

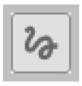
The Finished tasks tab lists completed tasks where you selected "Notify when done" when creating the task.

1. Select the task name.
   A window displays the task and task metadata.
2. Review the task and task metadata to make sure the task was completed successfully.
3. If satisfied that the task has been completed successfully, select **Finish task**.

The task is removed from the Finished tasks tab. You can still review the task by selecting the **Processes** tab and then selecting the **Completed** tab. See the *Processes* chapter for more information.

Signing

The Signing tab displays all signature requests that you have initiated. Select a document in the list to display the Search window. Documents in the search window that require a signature display a gray "Signing in progress" icon.



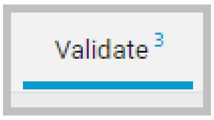
Select the **Signatures** tab to view the signing status of the document. For each person that has been requested to sign a document, the status can be one of the following:

- **in progress**: Documents where a signature has been requested but has not been signed yet.
- **signed**: Documents that have been signed.
- **declined**: Documents where the signature has been declined by one of the signers.
- **expired**: Documents where the time allowed for the documents to be signed has expired.
- **cancelled**: Documents where the signature has been cancelled by the requester or on behalf of the requester.

Validate

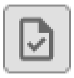
Validate tasks require you to examine and then indicate that you validated the document.

1. In the Tasks area on the Dashboard, select the **Validate** tab. The number beside the word Validate indicates how many document classes have validation tasks waiting.

   A list of document classes that require validation tasks display. Each listed document class also indicates how many validation tasks are waiting.

2. Select a document class.
   A filtered search list displays the documents routed to you requiring validation. Documents requiring validation display the "to be validated" icon next to the file name.

3. From the search list, select a document.
   A pane displays that contains information about the document you selected. The **Summary** tab is selected by default.

4. Validate the document:

   a) Read the **Summary** tab for an overview of already entered information about the document.

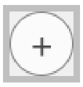
   b) Select the **Metadata** tab to add or edit information about the document, such as document name, a description, and the date, for example.

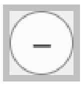
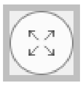
   See the *About checkbox attributes* topic for more information about attributes represented by checkboxes (Boolean).

   c) Select the **Content** tab to view the document.

   d) For PDF documents, use the tools in the PDF viewer to search, rotate, or enlarge the PDF.

   e) For image documents, use the icons on the right side of the image to make viewing the content easier. You may have to move you mouse over the image to see the icons.

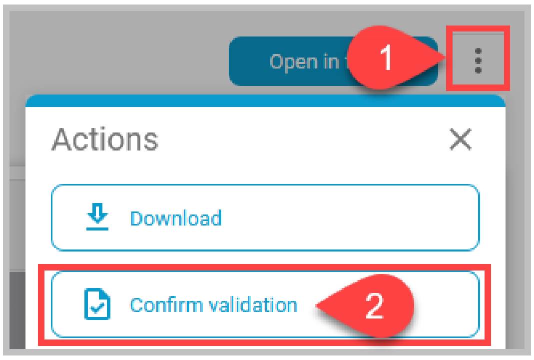
Icon	Description
	Rotate the document to the right.
	Rotate the document to the left.
	Enlarge the document size.

Icon	Description
	Reduce the document size.
	Display the document using the entire screen. Select this icon again to return to a regular view.

f) The **History** tab lets you view information about actions taken on the document.

g) On the **Comments** tab, you can add a comment about the document. Use the formatting icons to format your comment. Select **CTRL + Enter** on the keyboard or click the icon to save your comments.

5 When you have completed verifying the document, select the **Actions** menu (1) and then select **Confirm validation** (2).



Your validation is recorded, and the number of tasks decreases by one. The document displays a "validated" icon next to the file name.

6 Repeat this process for each of the documents in the list until they all display the validated icon.

7 When finished, select **Dashboard** on the left navigation pane to check if you have additional tasks assigned to you.

File upload

On the Dashboard, you can drag and drop documents on the "File upload" area to upload them to Kyocera Cloud Information Manager. You can also manually upload documents.

PDF format documents automatically have the OCR process run if the PDF is not already searchable. OCR accuracy depends on the quality of the PDF document uploaded. Poor character quality, such as low resolution, too small character size, and noise in a document, may affect OCR accuracy.

Supported file types

Uploaded documents must use a supported document format. The following file types can be uploaded to Kyocera Cloud Information Manager:

`.pdf, .doc, .dot, .docx, .dotx, .docm, .dotm, .xls, .xlt, .xla, .xlsx, .xltx, .xlsm, .xltm, .xlam, .xlsb, .ppt, .pot, .pps, .ppa, .pptx, .potx, .ppsx, .ppam, .pptm, .potm, .ppsm, .jpeg, .jpg, .tiff, .tif, .png, .eml`

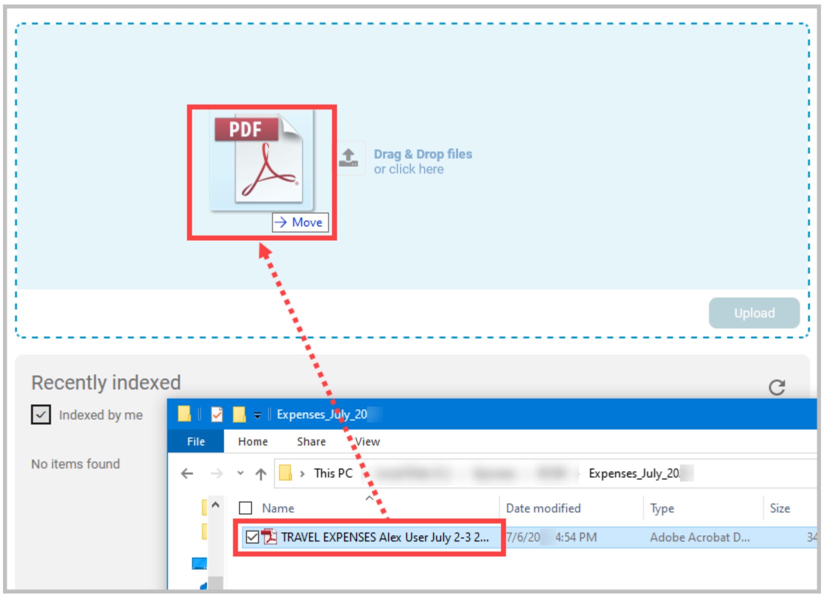
Preview when uploading files is only available for the following file types: `.pdf, .jpeg, .jpg, .png`

Adding documents using the drag and drop method

You can add documents to Kyocera Cloud Information Manager using the drag and drop method.

- You can upload a maximum of 10 documents at one time. If you try to drag and drop more than 10 documents, an error message displays and no documents are uploaded.
- The maximum file size for any individual document that you drag and drop is 30 MB.

Drag files from your computer's file system onto the "Drag & Drop files or click here" area on the Dashboard.



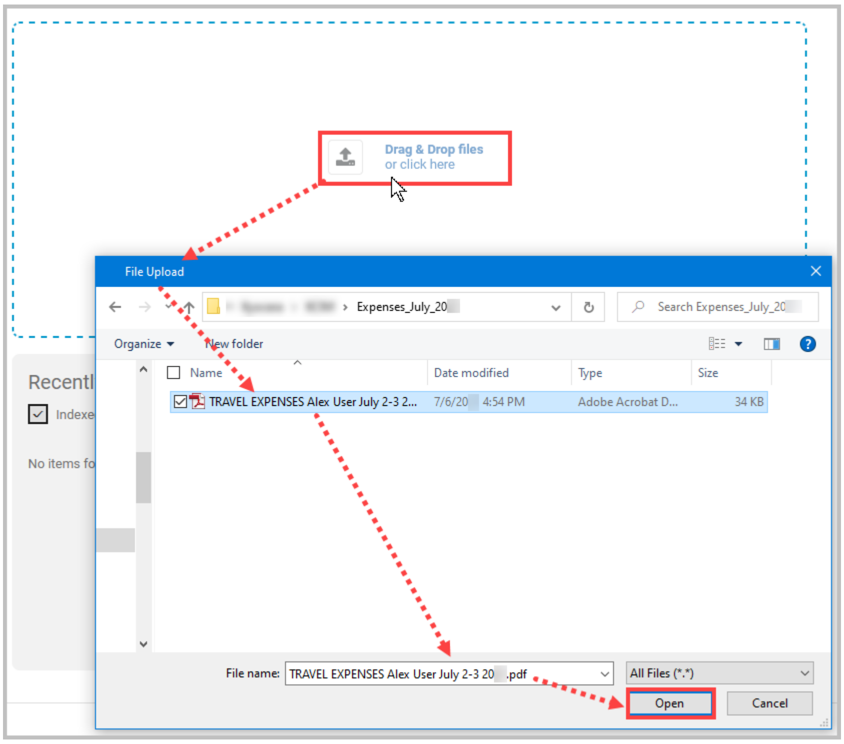
Adding documents manually using the "Drag & Drop files or click here" area

You can add documents manually to Kyocera Cloud Information Manager using the "Drag & Drop files or click here" area.

- You can only upload a maximum of 10 documents at one time. If you try to add more than 10 documents, an error message displays and no documents are uploaded.
- The maximum file size for any individual document that you can upload is 30 MB.

1 In the "Drag & Drop files or click here" area, select either the words, **Drag & Drop files or click here**, or the upload icon to open the "File Upload" window.

2 Browse and select the documents you want to add and select **Open**.



Uploading the documents

After selecting the documents to upload, the document names display in the File Upload" area.

1 Preview the document thumbnails and remove any documents you don't want to upload.

2 When you are satisfied with your list of documents, select **Upload** to add the documents to Kyocera Cloud Information Manager.

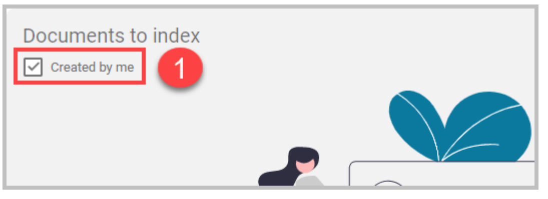
If the **Upload** button is not available, you have loaded an invalid document type, loaded more than 10 documents, or one of the documents you are uploading exceeds 30 MB. Remove invalid document types, remove documents to reduce the document count to 10 or less, or remove any documents that exceed 30 MB from the list of documents you are trying to upload.

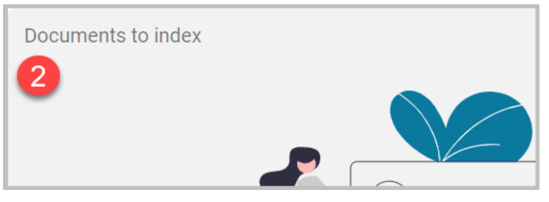
Documents you upload display in the "Documents to index" area after a few moments.

Documents to index

Your uploaded documents display in the "Documents to index" area.

For security reasons, your KCIM admin may set up KCIM to either allow or not allow you to view and index documents uploaded by other users. A security setting either displays (1) or hides (2) the "Created by me" check box on the Dashboard.





If the security setting allows you to see documents that other users have uploaded, **Created by me** is selected by default, so only the documents you uploaded display. Clearing **Created by me** displays documents uploaded by all users.

The images in this document assume that you can see the "Created by me" check box. If you do not see the check box, it is because your KCIM admin has decided that you can only view and index the documents you uploaded.

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

All documents that have not been indexed display this icon:

The "Documents to index" area lists a maximum of 50 documents at a time. If you have loaded more than 50 documents, these additional documents are displayed after indexing the currently listed documents.

OCR processing icons

Typically, there are two types of PDF documents:

- **Searchable**: These PDF files are text-based and retain the text and formatting of the original. You can copy text from them. These files can be searched without OCR processing.
- **Non-searchable**: These PDF files 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.

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

The icons change depending on the stage of the OCR process:

Icon	Description
	The PDF document is waiting for OCR processing. A document in this state cannot be indexed.
	The PDF document is currently undergoing OCR processing. A document in this state cannot be indexed.
(No icon)	The PDF document has completed OCR processing or did not require OCR processing.
	The PDF document OCR processing failed. A document in this state can be indexed. To save the document with OCR processing, either delete the document from the Indexing window or delete the document from Folders. Then start over again by uploading the document on the Dashboard.

OCR accuracy depends on the quality of the PDF document uploaded. Poor character quality, such as low resolution, too small character size, and noise in a document, may affect OCR accuracy.

Index a document

When you index a document, you provide information about the type and contents of the document.

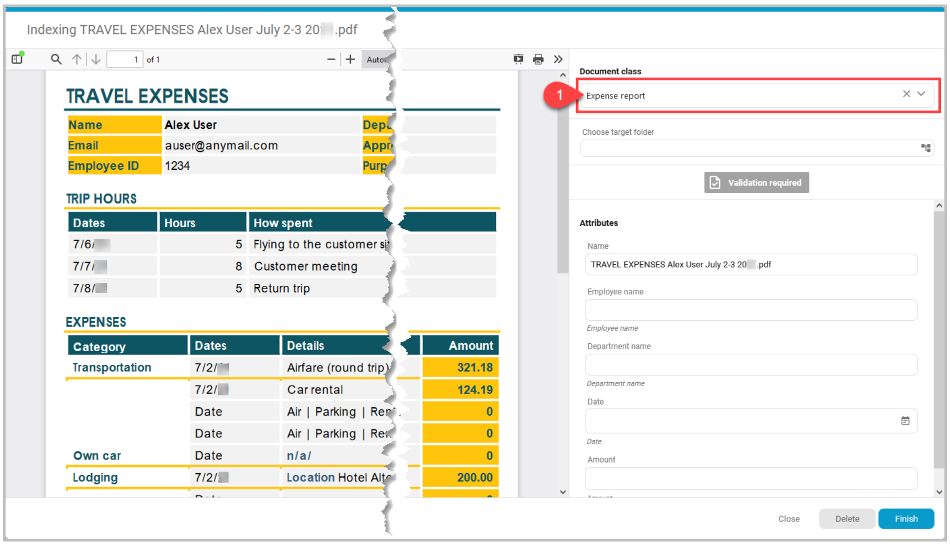
1 On the Dashboard, in the "Documents to index" area, select the document you want to index.

> For security reasons, your KCIM admin may set up KCIM to either allow or not allow you to view and index documents uploaded by other users. A security setting either displays or hides the "Documents to index" check box on the Dashboard.

> If you can see **Created by me,** it is selected by default so only the documents you uploaded display. Clearing **Created by me** displays documents uploaded by all users.

A preview of the document displays. The information you need to add displays on the right.

2 Make a selection from the "Document class" menu (1). In this example, Expense report was selected as the Document class.



After selecting a document class, additional fields display that require specific information entered. Each document class has a different set of required information. The next steps describe how to complete this travel expense example, but other document classes work similarly.

3 In the "Choose target folder" field, select the icon to open the file browser.

4 Browse and select the folder where you want this document added.

5 If this document requires validation, select **Validation required**. The document becomes visible to all users who possess write-access to the document type and appears in their task list.

6 The Attributes area is where you add specific information based on the document class. There are two methods to add the information.

- Manually enter the data into each field based on what you see in the document preview.

  > See the *About checkbox attributes* topic for more information about attributes represented by checkboxes (Boolean).

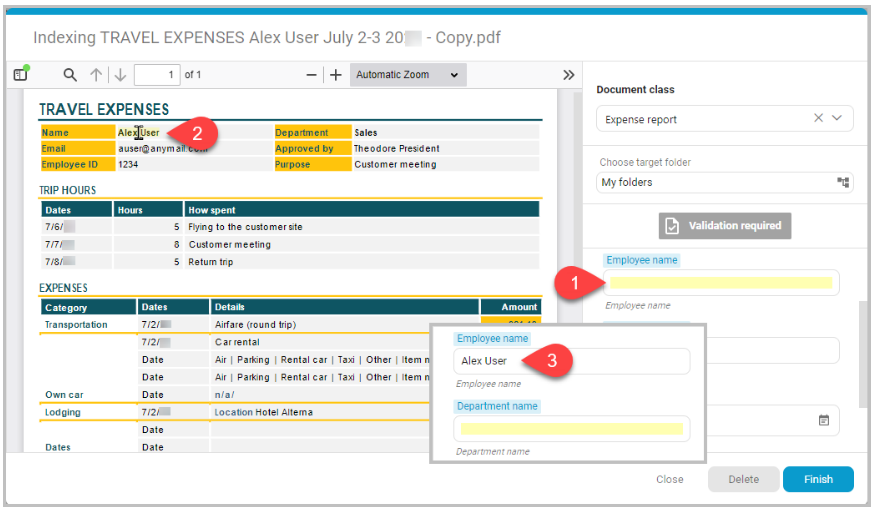
- Automatically enter the data into each field by using the "Click indexing" feature.

7 To use the "Click indexing" feature:

> The "Click indexing" feature is not supported for image files.

a) Click anywhere in the first field where you are required to enter information (1).

b) Move your cursor into the document preview area. As you move over the document, available text highlights yellow, and the cursor turns into an I-beam. When you are hovering over the information you want to add, click the mouse (2).
The highlighted data is entered into the field (3).



If you selected the wrong information, click the field with the incorrect information, move the cursor into the document preview area over the correct data and click the mouse. The field is updated.

c) Repeat these steps until all fields contain information.

8 (Optional) If you have additional documents to index, select **Continue indexing with the next document**. The remaining documents are presented, one at a time, for you to index until they are all complete.

9 When you have finished adding information, select **Finish**.
The documents you finished indexing display in the "Recently indexed" area and are archived in the folder you selected.

Bulk index documents

If you have many documents of the same type that all require the same indexing information added, you can use the "Bulk indexing" feature.

For security reasons, your KCIM admin may set up KCIM to either allow or not allow you to view and index documents uploaded by other users. A security setting either displays or hides the "Documents to index" check box on the Dashboard.

If you can see **Created by me,** it is selected by default so only the documents you uploaded display. Clearing **Created by me** displays documents uploaded by all users.

1 Add the documents you want to bulk index to the File upload area and select **Upload**.
After a few moments, the documents display in the "Documents to index" area.

2 In the "Documents to index" area, select **Bulk indexing**.
Checkboxes display next to each of the documents in the "Documents to index" area.

3 Select the documents you want to bulk index.

4 Select **Start indexing**.

5 Make a selection from the "Document class" menu.
After selecting a document class, additional fields display.

6 In the "Choose target folder" field, select the icon to open the file browser.

7 Browse and select the folder where you want these documents added.

When using bulk indexing, all documents are stored in the same folder.

8 If these documents require validation, select **Validation required**. All users with access rights to the same document classes are also notified that these documents are available to validate

9 The Attributes area is where you add specific information based on the document class. The information you add is applied to all the documents selected for bulk indexing. Either add the information directly in each field

or use the "Click indexing" feature to add information automatically. See the *Index a document* topic for information about "Click indexing."

10 When you have finished adding information, select **Finish**.
The documents you bulk indexed display in the "Recently indexed" area and are archived in the folder you selected.

Recently indexed

By default, the "Recently indexed" area displays the last 50 indexed files that you indexed. Clearing **Indexed by me** displays documents recently indexed to which you are granted Read access.

Selecting any indexed item in the list opens the item in **Folders**. See the *Folders* chapter in this guide for more information about viewing the item you selected.

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.

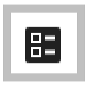
Read this chapter to become familiar with the Search bar features. See other topics in this chapter to learn about using logical operators and advanced filtering.

Using the Search bar

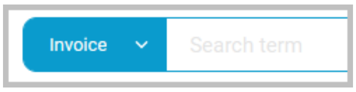
Document class selector (1)

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 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)

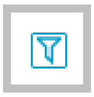
You can filter search results.

- 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 *Advanced filtering* and *Advanced filtering tips* topics for more information.

Search (4)

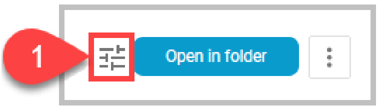
When you are finished adding document classes and filters to your search, conduct the search.

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

Configure the Search results columns

You can configure the columns displayed in the Search results window. Your settings are kept until you reset the column settings to the default settings.

1. After conducting a search, select the Configure columns icon (1).



A window displays the fields that are currently in the Search results window.

2. To reorder the columns, select the icon next to the column name and drag and drop a column name to a new location.

3. For each column, you can also make the following adjustments:

   a) Select the "Sort by column" icon to change the sorting order of the column.

   The first time you select the icon, it sorts the column in ascending order.

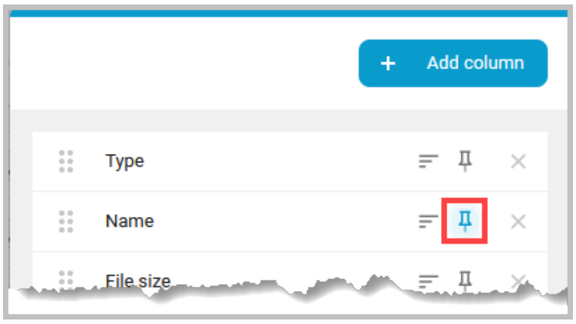
   

The second time you select the icon, it sorts the column in descending order.

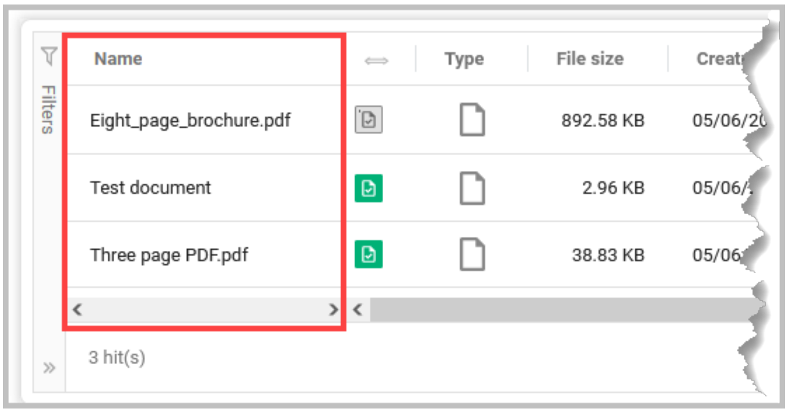
Selecting the icon a third time cancels the sort for the column. You can sort multiple columns.

b) Select the pin icon to freeze the selected column in the Search table.

For example, to freeze the **Name** column so it doesn't move off the screen when scrolling the window, select the pin icon and then select **Save**.



The window updates and displays Name as the first column. The other columns scroll separately.



You can pin multiple columns.

c) To add additional columns, select **+ Add column**. From the list presented, select the columns to display in the Search results window and click **Select**.

d) To remove a column, select the **X** next to the column name.

e) Select **Save** when finished.
The Search results window updates with your column settings.

f) To revert back to the default columns setting, select the Configure columns gear and then select **Reset to default**.

Logical operators

You can use logical operators to create search terms that more accurately return the results you expect. The logical operators **+**, **-**, **AND**, and **OR** are supported when creating search terms.

Operator	Description
+	Using the + operator in your search term means that the search results **must contain** the term behind the + operator. There is no blank space between operator and term. For example, a search for dog **+**cat returns items that must contain cat, but dog is not required. Syntax: **+**<term>
-	Using the - operator in your search term means that the search results **must not contain** the term behind the operator. There is no blank space between operator and term. For example, a search for dog **-**cat returns items that contain dog but must not contain cat. Syntax: **-**<term>
AND	Using the AND operator in your search term means that the search results **must contain both terms** connected with the operator. The operator is only identified in capital letters and separated by exactly one blank space from the two terms it is connecting. It is recommended to use the **+** operator instead of **AND**. Syntax: <term1> **AND** <term2>

Operator	Description
OR	Using the OR operator in your search term means that the search results **must contain at least one of the two terms** connected with the operator. The operator is only identified in capital letters and separated by exactly one blank space from the two terms it is connecting. Consecutive terms without any operator in between are interpreted as if they would be connected with **OR**. Thus, it is recommended to avoid the use of the **OR** operator. For example, entering `cat dog rabbit` as a search term conducts the search as `cat` **OR** `dog` **OR** `rabbit`. Syntax: <term1> **OR** <term2>

Advanced filtering

You can conduct advanced filtering using the Search bar. This advanced filtering lets you locate documents based on metadata automatically added by Kyocera Cloud Information Manager (KCIM) or by a user during the indexing process. Advanced filtering uses any document class selections you already made using the Document class selector.

The example that follows provides an overview of how the advanced filter operates. Use the example as a template for creating other advanced filters.

For this example, we need to find any documents with the name "Sales Projections" added to KCIM during the last week by our boss, Adele Vance, who is also the admin of our KCIM system. Using advanced filtering, we can remove any documents from our search that don't meet our criteria.

1 Select the filter icon on the search bar.

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

Available metadata

You can select from any of the displayed metadata to filter your search. Field names that are italicized are automatically generated system fields.

#Archiving

#Archiving is a system field that indicates the archiving status of a document. Select the **+** to view the #Archiving selections you can use as filters.

- **archived (#Archiving)**: Documents that are archived.

#Signature

#Signature is a system field that indicates the signature status of a document.

Select the **+** to view the #Signature selections you can use as filters.

- **in progress (#Signature)**: Documents where a signature has been requested but have not been signed yet.
- **signed (#Signature)**: Documents that have been signed.
- **declined (#Signature)**: Documents where the signature has been declined by one of the people requested to sign the document.
- **expired (#Signature)**: Documents where the time allowed for the documents to be signed has expired.
- **cancelled (#Signature)**: Documents where the signature has been cancelled by the requester or on behalf of the requester.

#Validation

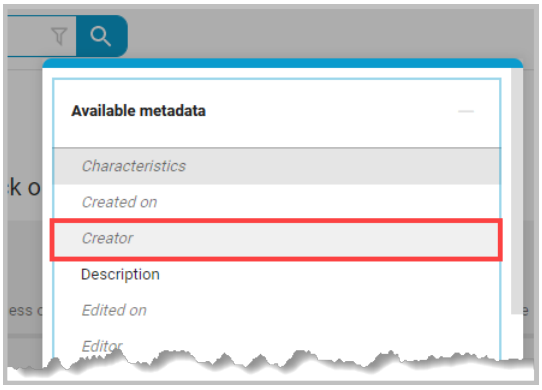
#Validation is a system field that indicates the validation status of a document. Select the **+** to view the #Validation selections you can use as filters.

- **requested (#Validation)**: Documents where validation has been requested but not yet done.
- **validated (#Validation)**: Documents that have been validated.

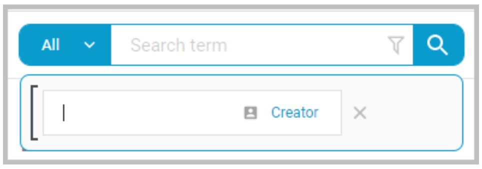
Saved filters

The Saved filters area displays a list of built-in filters that can be used to refine your search. Included are the following filters: Created on, Creator, Edited on, Editor, File size, and File type. Select the **+** to view the Saved filters selections you can use as filters.

2 Make a selection from the menu. For this example, select **Creator** since we want to find documents created by Adele Vance.



The advanced filter window displays a new line for Creator.

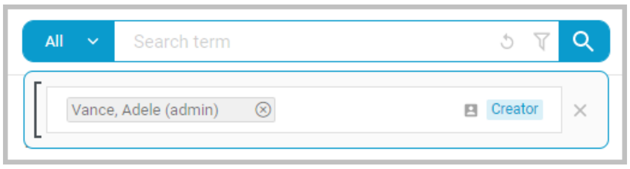


3 Type the name of the user we want to use in the filter.

> At least 2 characters are required for the user name list to display. For Creator, you can enter a username, first name, last name, or email address.

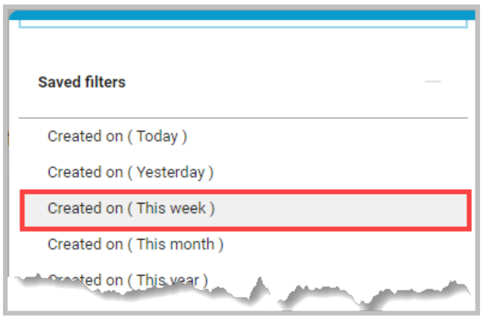
As we type `Adele Vance`, user names display. Select the correct user. For this example, Adele Vance.

Adele Vance displays as filter criteria for Creator.

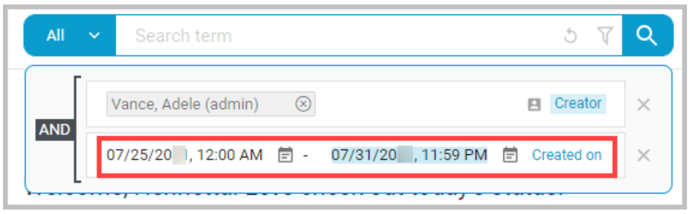


4 Next, we need to specify that we only want to see search results for documents created this week. Select the filter icon on the search bar to display the menu.

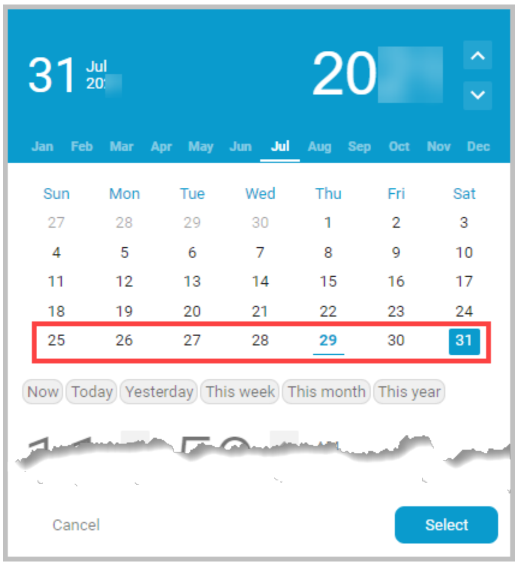
5 In the "Saved filters" area, select **Created on (This week)**.



A new line displays. The line includes the dates for the current week. The week includes the dates from Sunday through Saturday. You can select either of the calendar icons to further refine the dates and times for the filter.

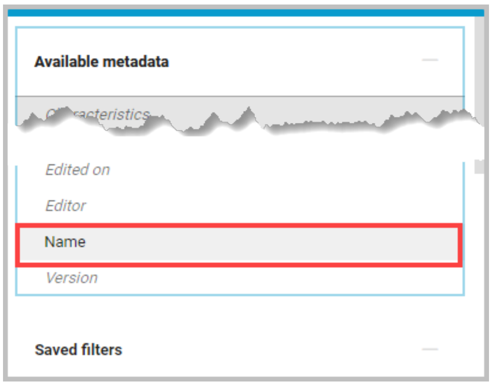


"This week" does not mean a week from the day you create the search criteria. The week is a calendar week. The date when the search criteria were created, July 29th, displays in blue with an underscore on the calendar.

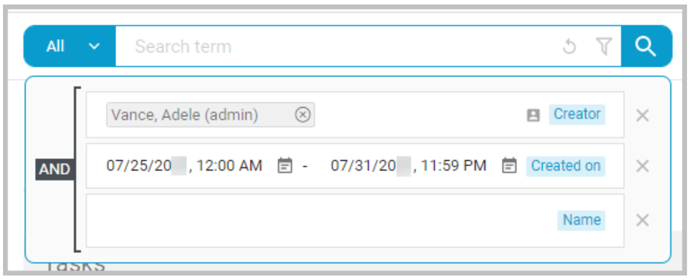


6 Now we need to find any documents that have "Sales Projections" in the name. Select the filter icon on the search bar to display the menu.

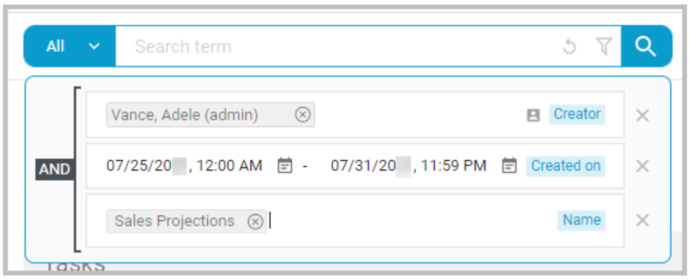
7 In the "Available metadata" area, select **Name**.



The advanced filter window displays a new line for Name.



8 Type the document name to use in the filter. For this example, type `Sales Projections` and press the Tab key on the keyboard.
Sales Projections displays as filter criteria for Name.



9 Select the Search icon (magnifying glass) or press Enter on the keyboard to conduct your search.
A Search window displays the documents that meet your advanced search criteria. If the results aren't as you expected, you can go back into the advanced filter and change or delete criteria. You can also remove search criteria directly on the Search window.

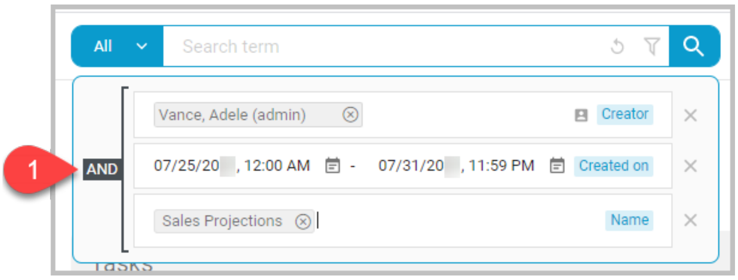
10 You can use the Actions menu on the Search window to manage the files you have filtered. See the *Actions menu* topic for more information.

In this example, we have located all files with the name "Sales Projection" created by Adele Vance between 07/25/23 and today, 07/29/23.

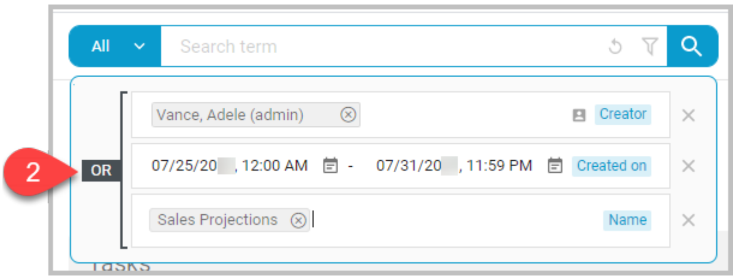
Advanced filtering tips

The example in the Advanced filtering topic provides enough information to build your own advanced filters. This topic discusses some of the details left out in the example.

- When you build an advanced filter, the logic is set to **AND** (1). All of the criteria must be met to provide a result.

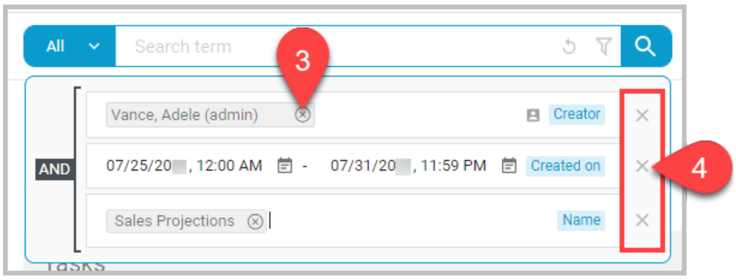


  The only results returned must be created by Adele Vance AND be within the dates shown AND have "Sales Projections" in the name.
- When you select the label **AND**, the label changes the logic for the advanced filter to **OR** (2).

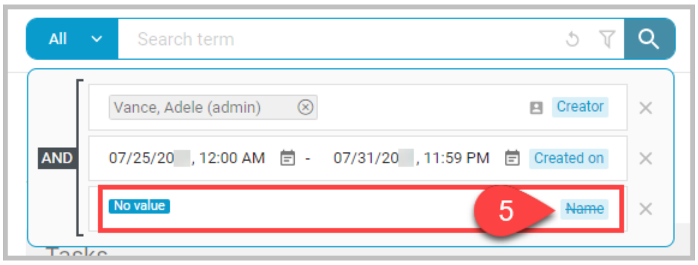


In this case, any matched criteria return a result. So, any documents created by Adele Vance OR created between the dates shown OR that have "Sales Projections" in the name will meet the criteria.

- You can remove any criteria from a line by selecting the **X** (3). You can remove an entire search criteria line by selecting the **X** (4).

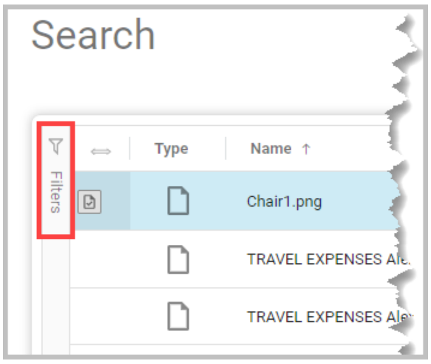


- Perhaps you want to find the documents created by Adele Vance between the indicated dates that do not have a name entered so you can see a list of them to add the names. Select the **Name** icon, which clears the search criteria you previously set and displays Name with a line through it (5).

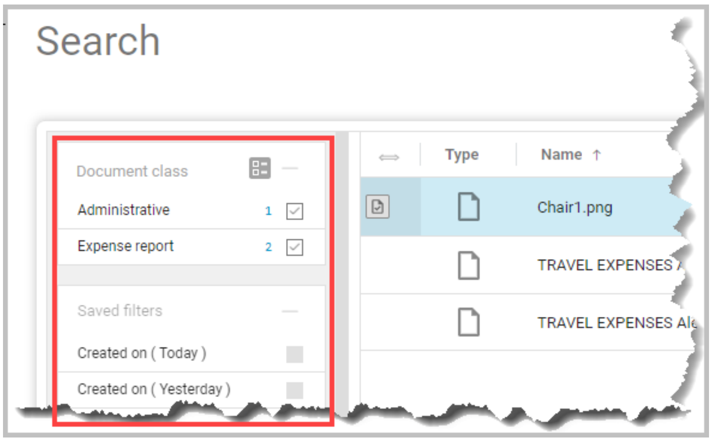


"No value" displays in place of your search criteria. Select the **Search** icon (magnifying glass), or press Enter on the keyboard, to search for the files where the Name field is blank.

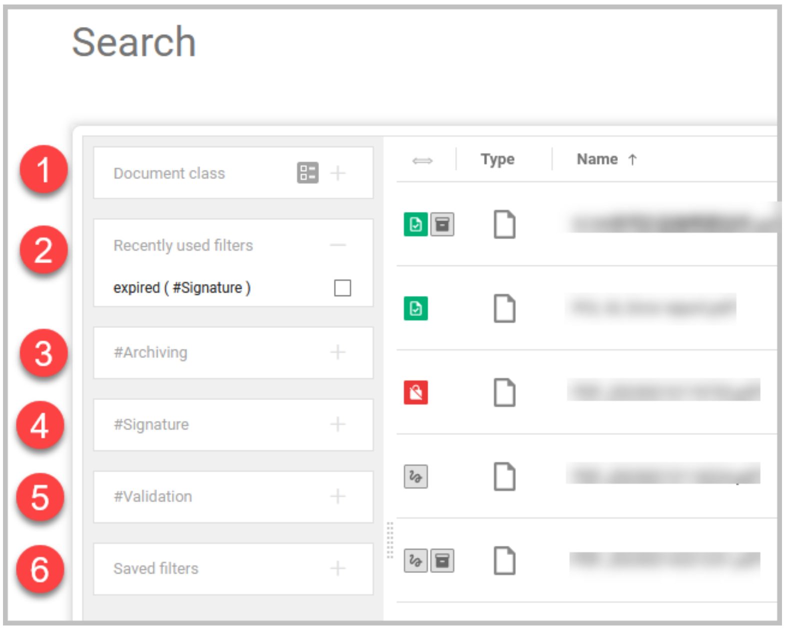
- You can filter the document list displayed in the Search window by selecting the **Filters** icon.



After the Filters area is expanded, select or clear the Document classes and filters displayed to refine your search. The Search window automatically updates when you select or clear a filter. Numbers beside the check boxes indicate the number of documents found for each listed Document class.



- The Filters area is divided into these sections:



Document class (1)

Document class relates to the document class assigned when indexing a document. The Document class displayed represent the types of documents present in the search results.

Recently used filters (2)

If you have previously used a search filter, it displays in this area for convenience.

#Archiving (3)

You can filter for documents that have had retention requested or been archived.

#Signature (4)

You can filter for documents that have had a signature requested.

#Validation (5)

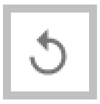
You can filter for documents that have had validation requested or for documents that have been validated.

Saved filters (6)

Saved filters are system-saved filters that let you quickly apply a filter to the Search window.

If Saved filters are used, up to five histories are kept. Available filters cannot be saved.

Select the Reset icon at the bottom of the Search pane to clear any save filters you have added to the search.



Reset clears any added filters and any Document classes you have selected.

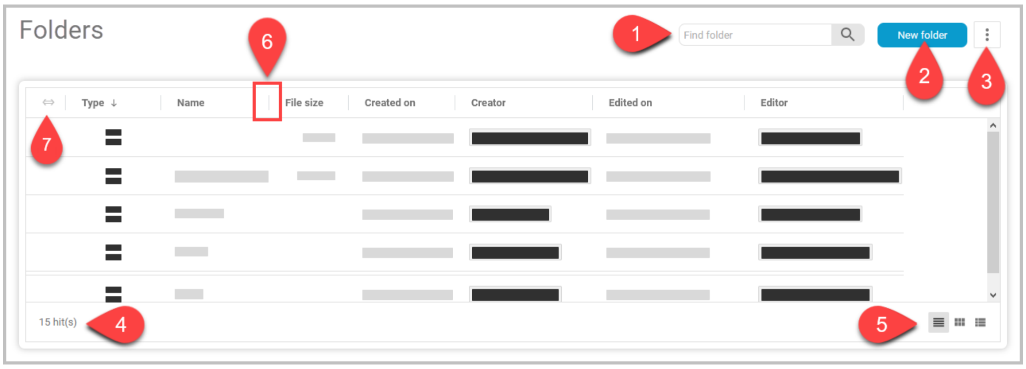
6 Folders

Select **Folders** from the navigation pane to display and manage folders and documents in Kyocera Cloud Information Manager (KCIM). All KCIM folders are visible, but you only have access to the documents inside the folders based on the access rights granted you by the admin.

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

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

These items 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 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.

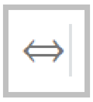
To automatically adjust the width of a column:

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

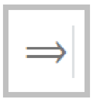
Reset all columns to default (7)

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.

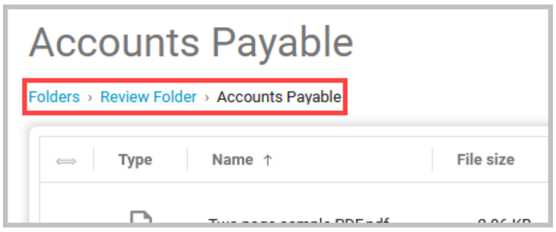


Breadcrumb navigation

Breadcrumb navigation links are available in sub-folders and in Search. Use the breadcrumb navigation links to quickly jump up the folder path to another folder.

Breadcrumbs in Folders

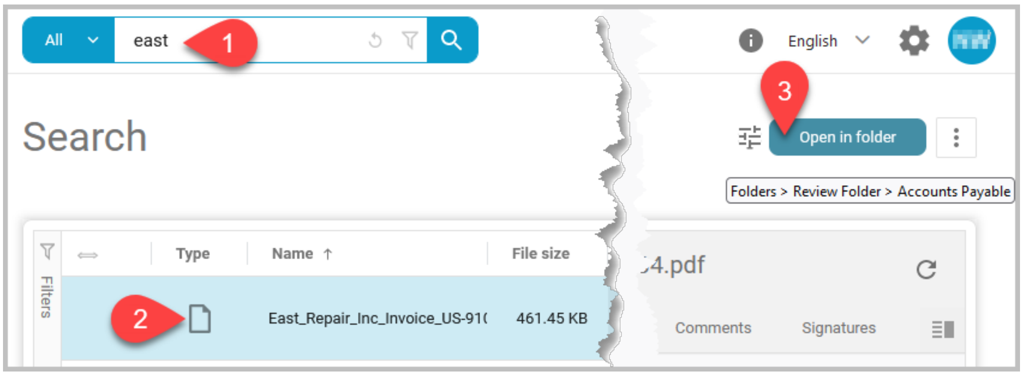
After opening a sub-folder in Folders, breadcrumb navigation displays below the folder name.



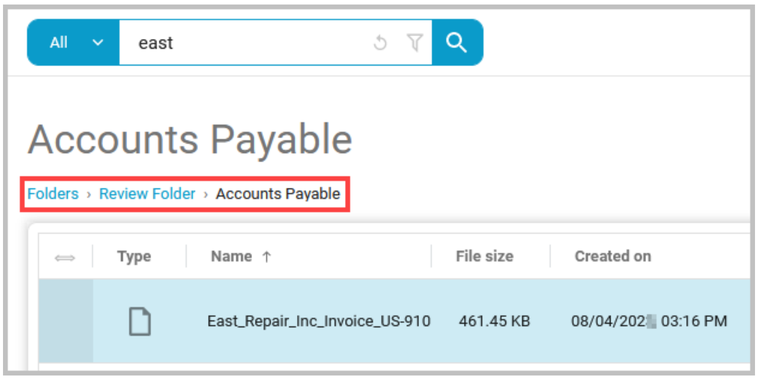
Select any breadcrumb navigation link to jump to a different folder.

Breadcrumbs in Search

After conducting a search (1), select an item from the search results (2). When you hover over **Open in folder** (3), the path from **Folders** to the selected item displays.



Selecting **Open in folder** (3) displays the selected item in the folder where it is stored. The breadcrumb navigation displays below the folder name.



Select any breadcrumb navigation link to jump to a different folder.

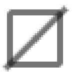
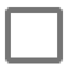
About checkbox attributes

If the document class has a "Boolean" attribute set, a checkbox displays when indexing the document. A checkbox lets you set whether the value is true or false.

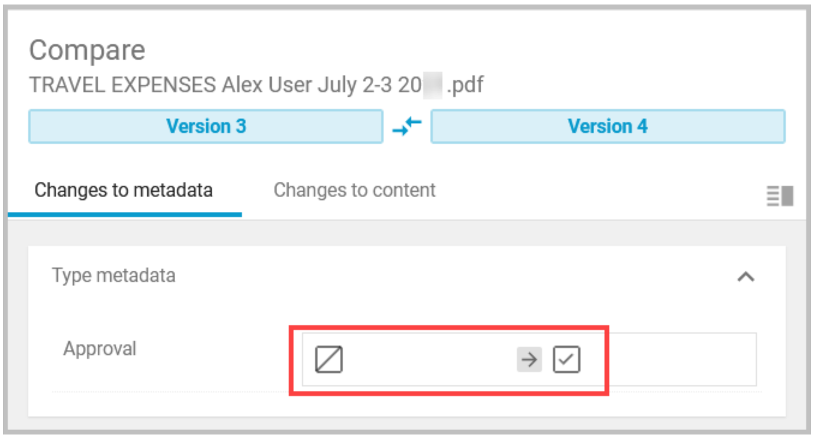
When you view the properties of a document in a Compare page, a Summary page, or a Metadata page, the checkbox can be in one of three states:

- Not Set
- False
- True

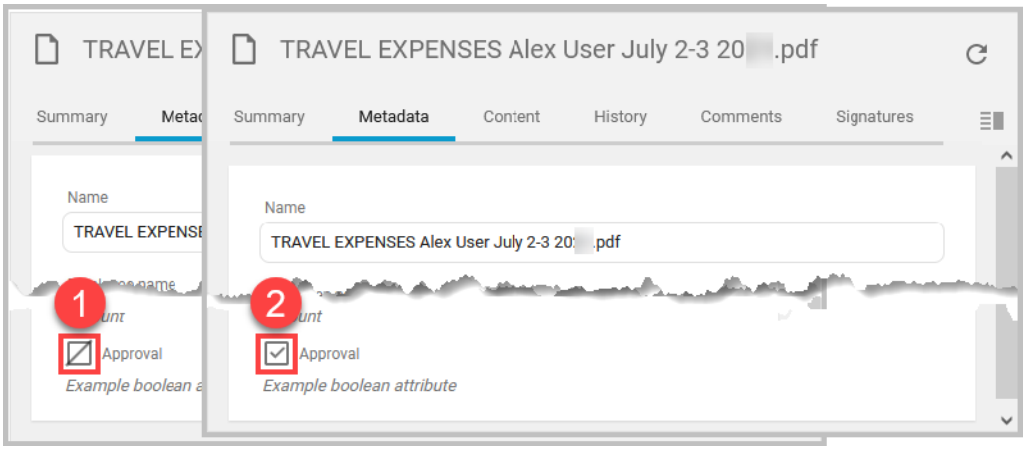
These three states are represented by icons:

Icon	Description
	Indicates "Not Set" in a Compare page
	Indicates "False" in a Summary (metadata) page and in a Compare page
	Indicates "True" in a Summary (metadata) page and in a Compare page

Here is an example of a Compare page where the "Approval" checkbox changed from "Not set" to "True" in the versions shown:



Here is an example of the "Approval" checkbox on a Metadata page changed from "Not set" (1) to "True" (2) in the versions shown:



View folder properties

You can view the properties of any folder in the Folders window.

1 Open a browser and log in to your account.

2 Select **Folders** from the navigation pane.

3 Select the folder whose properties you want to view.
A properties pane displays information about the folder on the right side of the window:

Folder content

Folders: The sum count of child folders under this parent folder

Documents: The sum count of documents in this parent folder and all child sub-folders

Size: The combined size of documents in the parent and all child sub-folders

Folder history

Select the ˅ icon to view the history of the folder.

There are two icons available that you can select:

(**Rename** icon) Select to rename the folder.

(**Open context** icon) Select to open the folder and display the contents of the folder.

View file properties

You can view the properties of any file in the Folders window.

1. Open a browser and log in to your account.
2. Select **Folders** from the navigation pane.
3. Navigate to the file you want to view and select the file name.
   A properties pane displays information about the file on the right side of the window:

Summary

Displays a summary of the information displayed in the other properties tabs. Select ˅ to view more information.

Metadata

Displays the metadata entered when the file was indexed. If you have the Write permission, you can edit metadata here.

See the *About checkbox attributes* topic for more information about attributes represented by checkboxes (Boolean).

Content

Image files: Displays a preview of the selected image file (.png, .tiff, or .jpg). Hover over the image to display and use the image tools.

PDF files: Displays a preview of the selected document file. Use the bar above the preview to toggle the sidebar, search for content in the document, jump to a page, decrease or increase the preview size, and display the Tools menu. The Tools menu lets you change how the preview appears on the screen and provides the properties of the document.

Email files: Displays a preview of the selected email file (.eml). Inline images are displayed. Attached files can be downloaded.

Microsoft 365 files: If the Microsoft 365 integration feature is activated for your organization, when you select a Microsoft Word, Excel, or PowerPoint document, the content is editable. See the *Microsoft 365 integration* topic for more information.

History

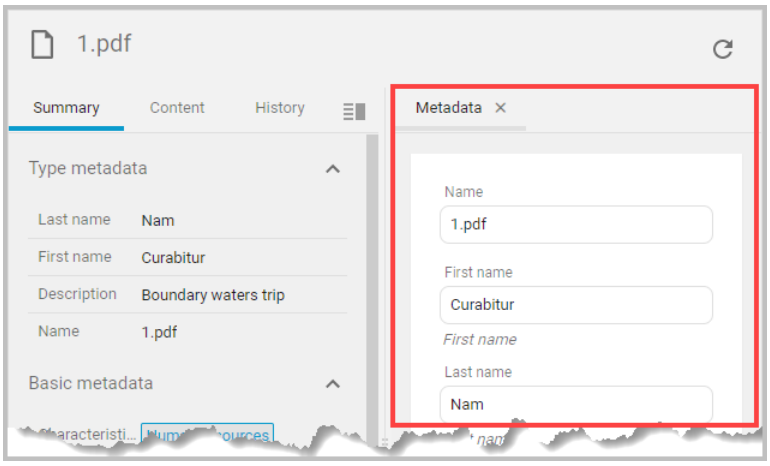
Displays the history of the file including version numbers. Select the filter icon to filter the list by date, modified, requested, or created data.

Comments

Displays any comments that have been attached to the file.

- You can add a comment to the file in the "Write comment" field. Use the icons below your comment to format the text.
- You can reply to a comment but cannot reply to a reply.

(Split aspect icon) Select the "Split aspect" icon to split the selected tab from the other tabs to view multiple tabs simultaneously. For example, selecting the **Metadata** tab and then the Split aspect icon displays the Metadata tab on the right of the properties window.



Select the **X** next to the tab name to close a split aspect.

Signatures

Displays information about any signatures requested for the selected document, including Signers and the status of a requested signature.

Microsoft 365 integration

The Microsoft 365 integration feature lets you view, edit, and print Microsoft 365 Word, Excel, and PowerPoint documents from within KCIM.

If Microsoft 365 integration is unavailable in your region, Microsoft documents use the standard non-editable document viewer.

When using the Microsoft 365 integration, the language displayed on the Microsoft 365 application interface is the same as the language set in KCIM.

Supported languages for the Microsoft 365 integration are: English, Japanese, German, French, Italian, Spanish, Dutch, Finnish, Turkish, Traditional Chinese, Korean, Thai, and Vietnamese.

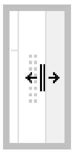
Due to Microsoft 365 limitations, you can only view and edit supported PowerPoint, Excel, and Word files. Visit the Microsoft 365 support pages on https://support.microsoft.com for more details.

View a Microsoft 365 document from the Content tab

You can view Microsoft 365 documents, such as Word, Excel, and PowerPoint, from within KCIM.

If you select a non-Microsoft 365 document, such as a PDF, the standard document viewer displays the document.

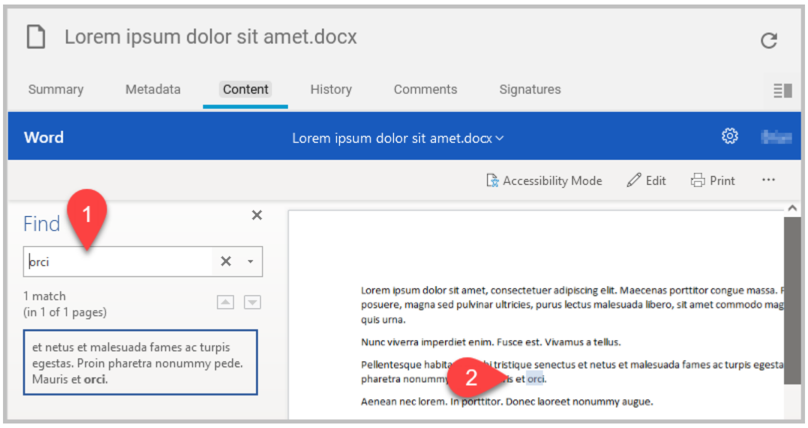
1. Open a browser and log in to your account.
2. Select **Folders** from the navigation pane.
3. Navigate to the file you want to view and select the file name.
   A properties pane displays information about the file on the right side of the window.
4. Select the **Content** tab.
   After a moment, the document displays in the Content tab.
5. Select and drag the handle on the left of the Content pane to see more of the document onscreen.

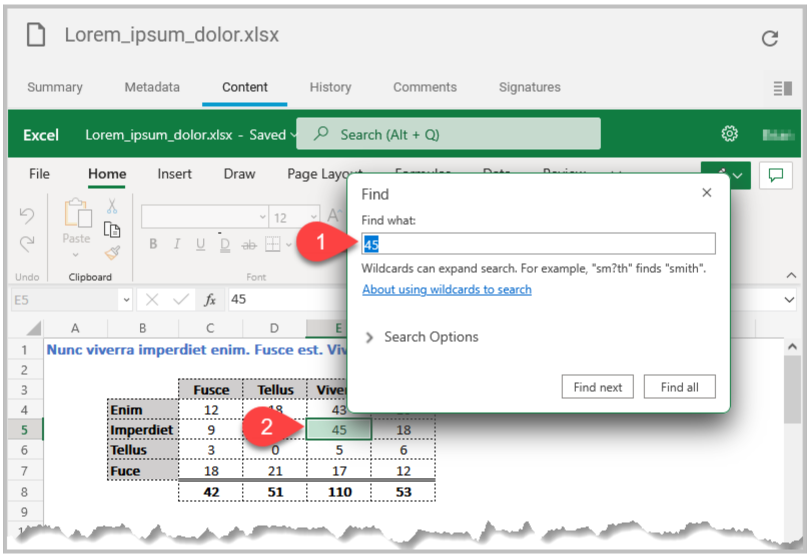
6. To find text in the displayed document:

   Word and **Excel**: Click anywhere in the document text and press **CTRL-F** on the keyboard. In the Find box, type your search term (1).

   In Word, as you type any matches are highlighted in the document (2).



In Excel, after typing the search term select **Find next** or **Find all**. Matches are highlighted in the document (2). You may have to move the Find dialog box to see the underlying spreadsheet.



PowerPoint: You cannot find text in a PowerPoint document from the Content tab. You must open the document for editing first.

Select **Edit in Browser**. After the document opens in a new tab or window, press **CTRL-F** on the keyboard. In the Find box, type your search term. Type your search term in the "Find " text box and select **Find next**. You may have to move the Find dialog to see the underlying document.

About editing Microsoft 365 documents

You can edit Microsoft 365 documents, such as Word, Excel, and PowerPoint, from within KCIM.

Note the following before editing a document:

- Due to Microsoft 365 limitations, you can only edit supported PowerPoint, Excel, and Word files. Visit the Microsoft 365 support pages on https://support.microsoft.com for more details.

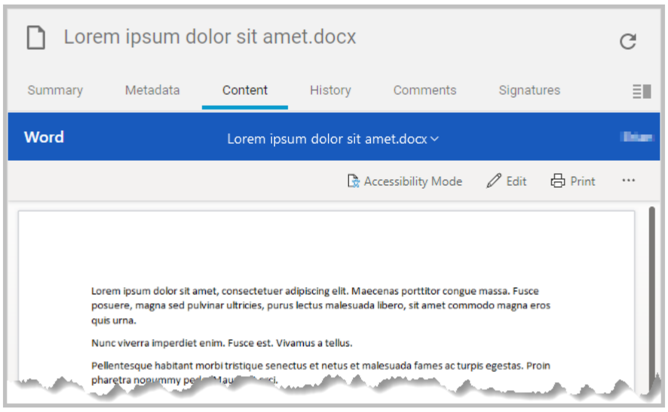
- If you select a non-Microsoft 365 document, such as a PDF, the standard document viewer displays the document.
- When opening a Microsoft 365 document:
  - Microsoft 365 documents that are under retention in KCIM cannot be edited.
  - Microsoft 365 files that are encrypted with a password cannot be opened, even if you supply the password. You must download the file, edit it in a desktop version of the Microsoft software, and re-upload the modified document.
  - Microsoft 365 files with macros can be opened, but the macros cannot be accessed or executed.
  - If the selected Microsoft 365 document is an old format document, for example, `.doc` instead of `.docx`, you are prompted to convert the document to the newer format before editing. Select **Convert** to convert the document to the new format. Select **View** to view the document but not edit it.
- The standard Microsoft 365 features are available when editing a Microsoft 365 document.
  - You may be asked to log in to your Microsoft account before you can edit a document.
- All changes made to the document are automatically saved as you work.
  - The **File** menu has many items removed or deactivated to support document integrity in KCIM. For example, you cannot save a document from a Microsoft 365 application to KCIM with a different name.
  - If you add content to a document you are editing so that the updated document exceeds the KCIM file upload limit, you may not be able to open the document again for editing in KCIM. Be aware when adding to a document that you do not exceed the file upload size limit.
  - If you want to edit a large file and it takes KCIM over 60 seconds to download the file for editing, the download may time out, and the file may not open.
  - Standard Microsoft 365 co-authoring indicators display any other editor's presence and the changes they are making.
- When you close the Microsoft 365 editing window or tab, the changed document is re-loaded to KCIM as the newest version.
  - If you take longer than 15 minutes to edit a Microsoft 365 document, the 15-minute auto-logout from KCIM is disabled so you can continue editing the document. If you log out of KCIM while the Microsoft 365 editing window is still open, the Microsoft 365 document editing session is closed, and the document is saved to KCIM.
  - If more than one user edits a document simultaneously, the changed document is re-loaded to KCIM as the newest version after the last user closes their editing window or tab.

Edit a Microsoft 365 document

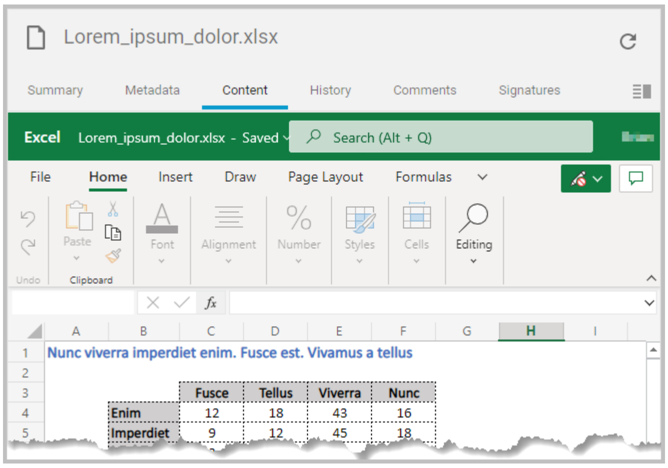
You can edit Microsoft 365 documents from within KCIM. See the *About editing Microsoft 365 documents* topic for important information about editing and saving Microsoft 365 documents.

1. Open a browser and log in to your account.
2. Select **Folders** from the navigation pane.
3. Navigate to the file you want to edit and select the file name.
   A properties pane displays information about the file on the right side of the window.
4. Select the **Content** tab.
   After a moment, the document displays in the Content tab.

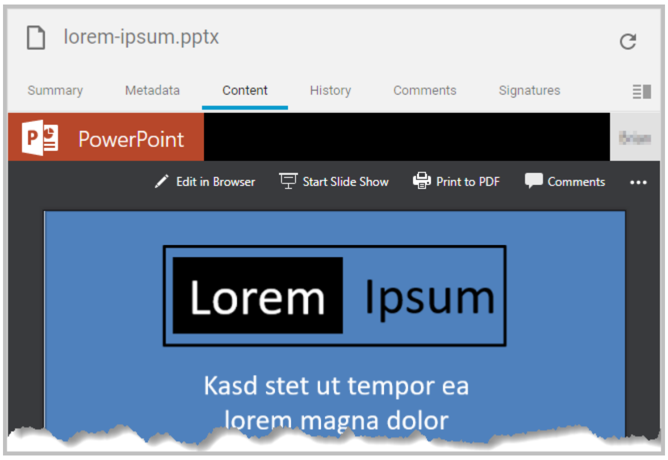
   Word example:



   Excel example:



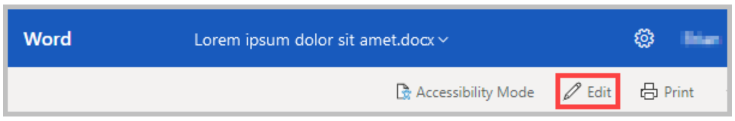
   PowerPoint example:



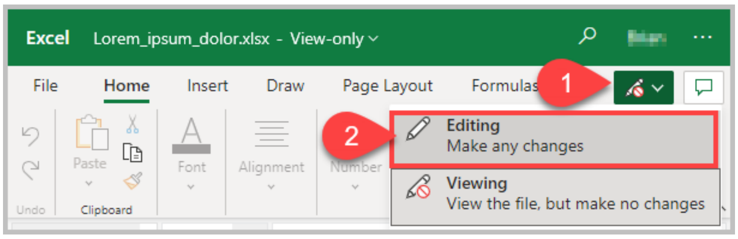
5 To begin editing:

> You may be asked to log in to your Microsoft account before you can edit the document.

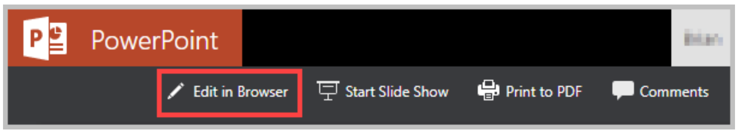
- **Word**: Select the **Edit** icon



- **Excel**: Select the **Viewing** (1) menu and then select **Editing** (2).



- **PowerPoint**: Select **Edit in Browser**.

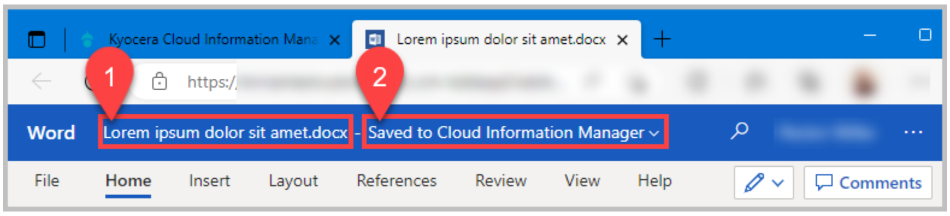


A new browser window or tab opens and displays the document using the online version of the Microsoft application for the document.

6 Edit the document, as needed.

For any document you are editing:

- You cannot change the document name (1).
- The "Saved" message (2) changes to "Saving" or "Saved to" whenever you make any updates to the document.



7 When finished, close the browser window or tab where you were editing.

> If you take longer than 15 minutes to edit a Microsoft 365 document, the 15-minute auto-logout from KCIM is disabled so you can continue editing the document. If you log out of KCIM while the Microsoft 365 editing window is still open, the Microsoft 365 document editing session is closed, and the document is saved to KCIM.

The updated document is re-loaded to KCIM as the newest version. After a few moments, the document window on the Content tab refreshes and displays the updated document.

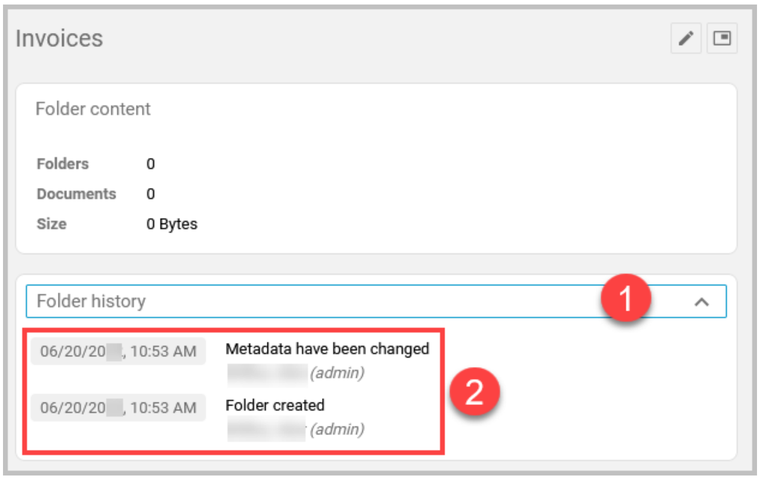
The "Uploaded data usage" for your organization increases by the size of the new file, not by the size of the changes you made. For example, if you made a minor edit to a 1 MB file, a new 1 MB file is uploaded to KCIM.

About document and folder history

You can view the history of any document or folder in **Folders**

Folder history

If you select a folder, a simplified history displays in the properties pane, as shown in the example below.

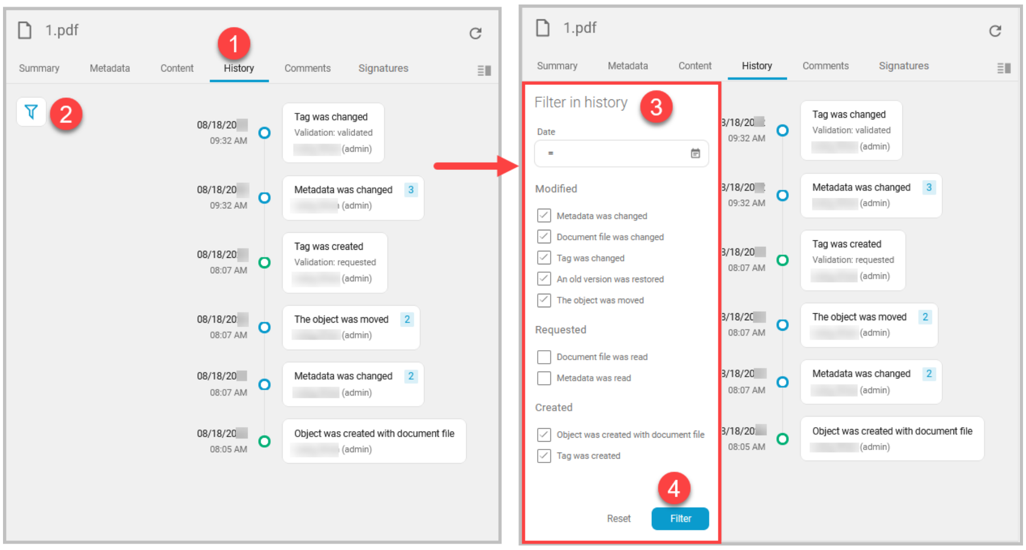


Select the ˅ (1) to view the folder history (2).

Document history

The history that displays for a document is different than the history shown for a folder. A document history displays a timeline. An example of the history for a document is shown in the example below.

In **Folders** or any subfolder, select a document. On the properties pane, select the **History** tab (1).



Select the filter icon (2) to view the "Filter in history" (3) window.

Clear or select any of the check boxes from the **Modified**, **Requested**, or **Created** areas and then select **Filter** (4) to update the history list. To restore the default filters, select **Reset** and then select **Filter**.

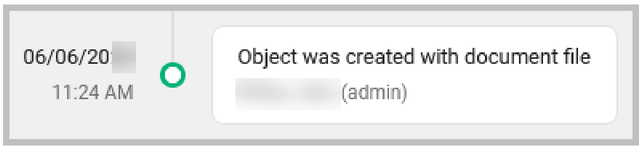
History messages

Underlying KCIM is a sophisticated and customized database. As actions are taken on items in the database, the history of those events are recorded.

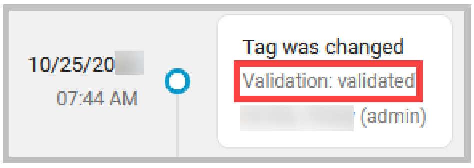
In the History messages, everything that is not a document file or a folder can be described as an "object." An object is any part of a database that can be used to manipulate or store data.

History message examples

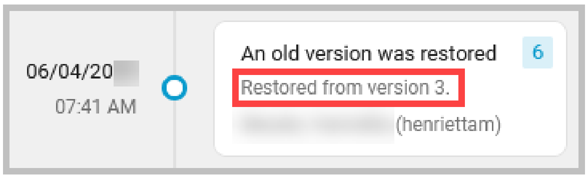
For example, if you upload a document, the message "Object was created with document file" is recorded to the history for the document.



If there is a change to a tag, the tag name and status are displayed on the second line of the history.



If an old version of a document has been set as the current version, the second line displays the old version number.



Actions menu

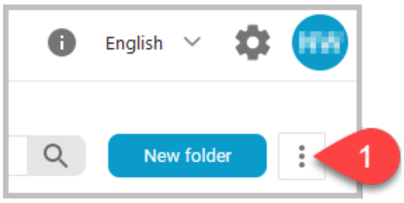
The Actions menu, available in both **Folders** and the **Search** results window, lets you conduct various maintenance tasks on documents and folders.

Actions menu in Folders

The Actions menu is available in the Folders window.

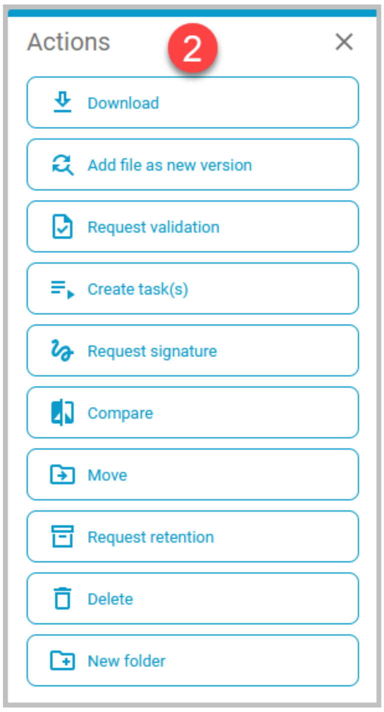
Select the **Actions** menu icon (1) to view the menu.

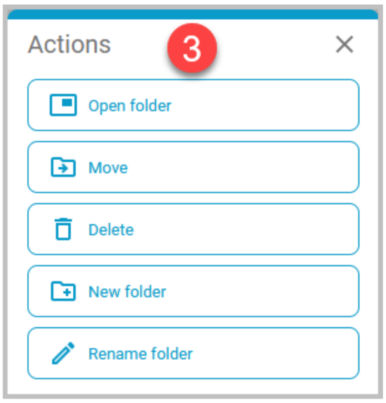
The images in this topic are **examples**. The available actions vary, depending on the document or folder you selected. See the *Actions associated with documents* and *Actions associated with folders* topics for information about all actions.



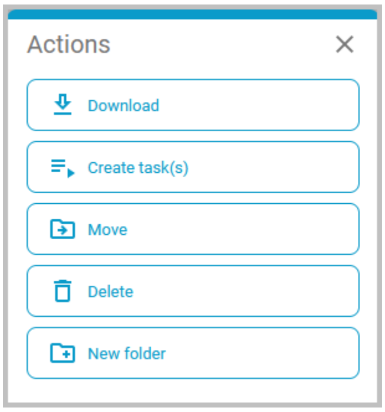
In this example, if you select a document, the Actions menu (2) displays options for document actions. If you select a folder, the Actions menu (3) displays options for folder actions.

The images below are **examples**. The Action menu items that display depend on the document or folder and the type of document selected. See the *Actions associated with documents* topic for information on all Actions available.





When multiple files and documents are selected, the Actions menu displays only actions that can be taken on your selections.



Actions associated with documents

Download

Downloads the selected document to your local machine.

Required permission: Read

Add file as new version

Allows you to replace the current version of the selected document with a new document. The older document is retained, and the new document uploaded becomes the current version.

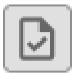
- If the uploaded file is a non-searchable PDF file, OCR is performed again. It is recommended to re-index as needed.
- Data usage calculation: Current file size (original file) + replaced file size (new upload) + replaced file size (after OCR)

Required permission: Write

1. Browse for the document that becomes the new version.
2. Select **Open**. A preview of the document displays.
3. Select **Add** to add the uploaded document as the new version.

Request validation

Flags that you have requested someone validate the accuracy of the selected document. Documents requiring validation display a "to be validated" icon next to the file name.



Users with appropriate rights can validate the document from the Tasks area on the Dashboard.

Required permission: Write

Confirm validation

Flags that you have validated the accuracy of the selected document. Documents that are validated display a "validated" icon next to the file name.

After you have validated a document in the Tasks area, the request to validate the document is removed from the Tasks list for all users.

A document that has been validated cannot be validated again.

Required permission: Write

Create task(s)

Lets you create a task for another user or yourself. Select either **Single task** to send a task to one user or select **Task sequence** to send a task to multiple users in sequence. See the *Create task(s)* topic in the *Actions menu* section for more information.

Required permission: Write

Request signature

Allows you to request a signature for a single document from up to six people, none of whom need to be KCIM users.

The **Request signature** feature is only available if Signatures has been configured by your Customer Admin.

Documents waiting for a signature display the "Signing in progress" icon next to the file name.

Documents that have had the signature process completed display the "Signed" icon next to the file name.

See the *Request signature* topic in the *Actions menu* section for more information.

Required permission: Write

Compare

Allows you to compare different versions of uploaded documents. See the *Compare versions* topic in this chapter for more information.

Required permission: Read

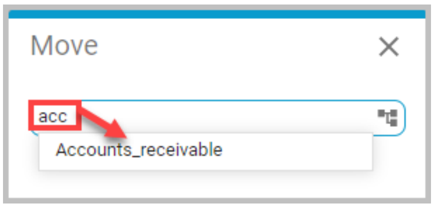
Move

Moves selected documents from the current location to another Kyocera Cloud Information Manager (KCIM) location.

Required permission: Write

The folder where you want to move the selected documents must already exist.

1. In the current folder, select the documents you want to move.
2. Select the **Actions** menu and then select **Move**.
3. Use one of these methods to conduct the move:
   - Select the folder tree icon
     
     and then select the folder where you want the documents to be moved. If the folder listing is lengthy, you can search for the folder.
   - Enter a folder name into the text box and select a folder from the list presented.



4. Select **OK** to move the documents.

Print

Prints the selected document. Only PDF documents can be printed.

Required permission: Read

Selecting multiple documents to print is not supported.

Request retention

Sets the document for retention. You only see this menu selection for document classes you have permission to access and if activated for your organization. See the *Request retention* topic for more information.

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. Documents with an expired retention date can be deleted. Check with your KCIM Administrator about any policies regarding expired documents before deleting them. Deleted documents cannot be recovered.

Required permission: Write

Delete

Deletes the selected documents immediately and permanently.

Required permission: Delete

New folder

Creates a new folder in the folder where the selected document resides.

All users are able to run. (Available only in Folder view.)

The selected document is not moved into the new folder.

Set as current version

Lets you select a version of a document to become the current version of the document. Requires, at a minimum, that the document must be at least version 3. If the document was a PDF file that required OCR, the document must be at least at version 4.

Setting an older version of a document as the current version can only be done in the **Versions** window.

See the *Set as current version* topic in this chapter for more information.

Required permission: Write

Actions associated with folders

Compare

Allows you to compare different versions of folders. See the *Compare versions* topic in this chapter for more information.

All users are able to run.

The Compare menu item is only available if changes have been made to the folder beyond the initial "Folder created." You can view a folder's history by selecting the folder name and then on the Properties pane on the right, select the ˅ in the Folder history area.

Open folder

Opens the selected folder and displays a list of files contained in the folder. A properties pane displays that provides information about the folder and folder history.

All users are able to run.

Move

Moves selected folders from the current location to another KCIM location.

All users are able to run.

If there are files/folders under the selected folder, the entire folder can be moved regardless of your user rights.

1. In the current folder, select the folders you want to move.
2. Select the Actions menu and then select **Move**.
3. Select the folder tree icon.

4. Select the folder where you want the selected folders to be moved. If the folder listing is lengthy, you can search for the folder.

   The destination folder where you want to move the selected folders must already exist.

5. Select **OK** to move the folders.

   If the same folder name exists in the destination folder, then -Copy is added in the folder name.

Delete

Deletes the selected folders immediately and permanently. Folders must be empty before deleting them.

All users are able to run.

If there are files/folders under the selected folder, the entire folder cannot be deleted regardless of your user rights.

Folder deletion is not logged.

New folder

Creates a new folder in the current folder.

All users are able to run. (Available only in Folder view.)

Rename folder

Renames the selected folder. Enter a new name or edit the current name in the "Rename folder" dialog box. Select **Update** to rename the folder.

All users are able to run.

Actions menu in Search results

The Actions menu is available in the Search results window. Select the Actions menu icon to view the menu. The available actions vary depending on the documents you selected.

Actions associated with documents

Download

Downloads the selected document to your local machine.

Required permission: Read

Add file as new version

Allows you to replace the current version of the selected document with a new document. The older document is retained, and the new document uploaded becomes the current version.

- If the uploaded file is a non-searchable PDF file, OCR is performed again. It is recommended to re-index as needed.
- Data usage calculation: Current file size (original file) + replaced file size (new upload) + replaced file size (after OCR)

Required permission: Write

1. Browse for the document that becomes the new version.
2. Select **Open**. A preview of the document displays.
3. Select **Add** to add the uploaded document as the new version.

Request validation

Flags that you have requested someone validate the accuracy of the selected document. Documents requiring validation display a "to be validated" icon next to the file name.

Users with appropriate rights can validate the document from the Tasks area on the Dashboard.

Required permission: Write

Confirm validation

Flags that you have validated the accuracy of the selected document. Documents that are validated display a "validated" icon next to the file name.

After you have validated a document in the Tasks area, the request to validate the document is removed from the Tasks list for all users.

A document that has been validated cannot be validated again.

Required permission: Write

Create task(s)

Lets you create a task for another user or yourself based on one or more documents you selected in the Search results window. Select either **Single task** to send a task to one user or **Task sequence** to send a task to multiple users in sequence. See the *Create task(s)* topic in the *Actions menu* section for more information.

Required permission: Write

Request signature

Allows you to request a signature for a single document from up to six people, none of whom need to be KCIM users.

The **Request signature** feature is only available if Signatures has been configured by your Customer Admin.

Documents waiting for a signature display the "Signing in progress" icon next to the file name.

Documents that have had the signature process completed display the "Signed" icon next to the file name.

See the *Request signature* topic in the *Actions menu* section for more information.

Required permission: Write

Compare

Allows you to compare different versions of uploaded documents and folders. See the *Compare versions* topic in this chapter for more information.

Required permission: Read

Open in folder

Opens the selected document in the folder where the document resides. You can see the folder name where the document resides and the breadcrumb of the path back to Folders.

Required permission: Read (Only available in Search view.)

Move

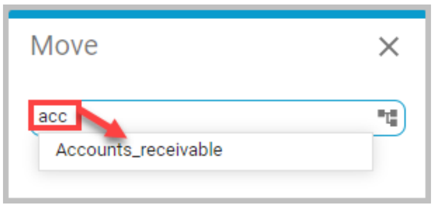
Moves selected documents from the current location to another Kyocera Cloud Information Manager (KCIM) location.

Required permission: Write

The folder where you want to move the selected documents must already exist.

1. In the current folder, select the documents you want to move.
2. Select the **Actions** menu and then select **Move**.
3. Use one of these methods to conduct the move:
   - Select the folder tree icon
     
     and then select the folder where you want the documents to be moved. If the folder listing is lengthy, you can search for the folder.

- Enter a folder name into the text box and select a folder from the list presented.



4. Select **OK** to move the documents.

Print

Prints the selected document. Only PDF documents can be printed.

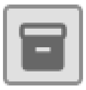
Required permission: Read

Selecting multiple documents to print is not supported.

Request retention

Sets the document for retention. You only see this menu selection for document classes you have permission to access and if activated for your organization. See the *Request retention* topic for more information.

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. Documents with an expired retention date can be deleted. Check with your KCIM Administrator about any policies regarding expired documents before deleting them. Deleted documents cannot be recovered.

Required permission: Write

Delete

Deletes the selected documents immediately and permanently.

Required permission: Delete

Compare versions

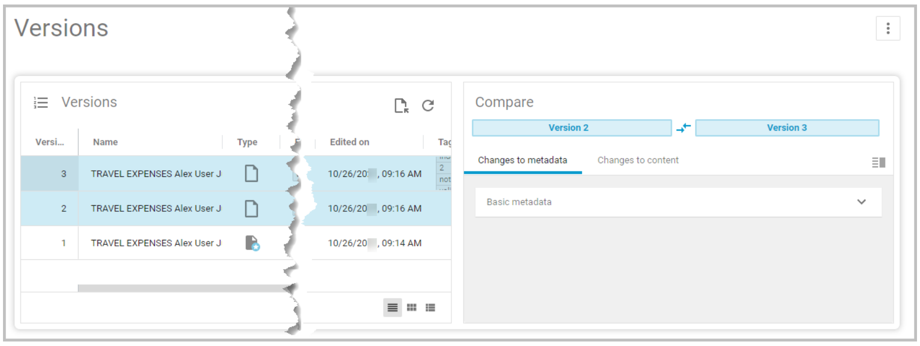
The Compare feature lets you see differences between any two versions of a document or a folder in Folders. The feature can display changes to the metadata (folders and documents) or to the content of the document.

You can also use the Compare versions feature to set an older version as the current version. See the *Set as current version* topic for more information.

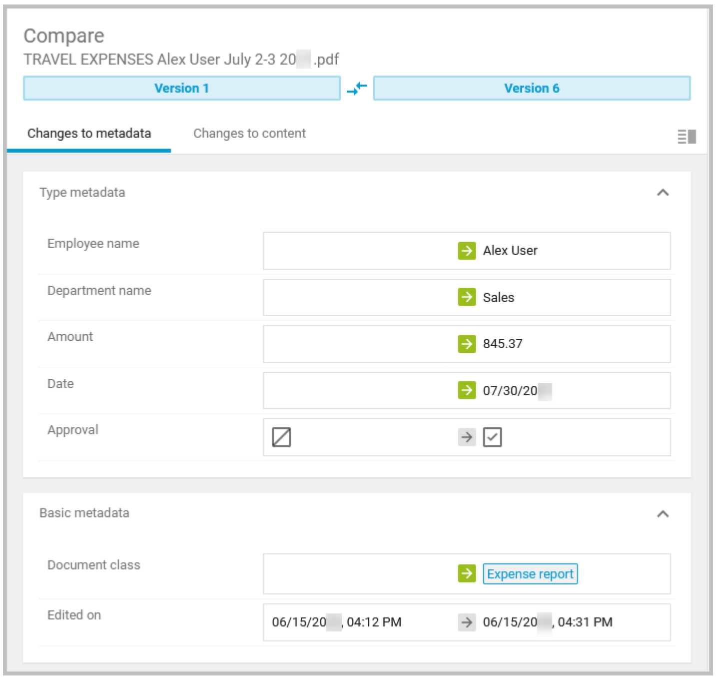
Compare changes to metadata

You can compare changes to metadata between two versions of the same document.

1. Locate and select the document you want to compare.
2. Select the **Actions** menu and then select **Compare**.
   The Compare pane displays a comparison of the latest two versions of the document. **Changes to metadata** is selected by default.



3. In the Compare pane, in the "Basic metadata" area, select ˅ to display the metadata information.
   The pane updates and displays the metadata changes. In this example, the Version 1 metadata is on the left, and the Version 6 metadata is on the right, showing the changes made.



The Tags information displayed is KCIM system-generated information and is not editable.

4 To see the changes between different versions, on the left pane, select the first version to compare. Press and hold the **CTRL** key on your keyboard and select the second version to compare.
The pane updates and compares the metadata changes between the two versions you selected.

Compare changes to the content

You can visually compare changes to content between two versions of the same document. You can also download or print documents from the Actions menu.

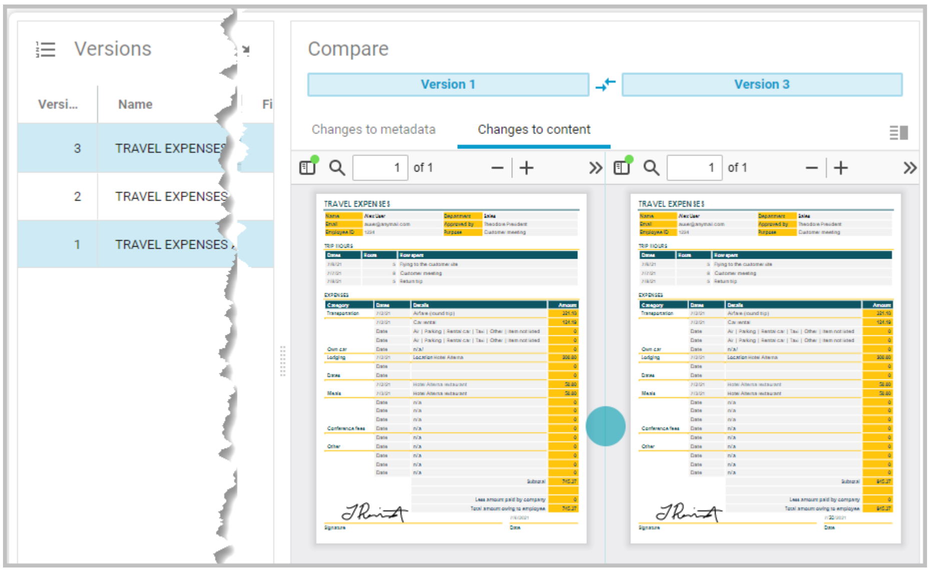
1 Locate and select the document you want to compare.

2 Select the **Actions** menu and then select **Compare**.
The Compare pane displays a comparison of the latest two versions of the document. **Changes to metadata** is selected by default.

3 Select **Changes to content**.
The Compare pane refreshes and displays the content of the latest two versions of the document.

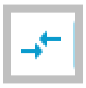
4 To see the changes between versions that are different than the last two versions, in the Versions area select an older version to compare. Press

and hold the **CTRL** key on your keyboard and select the newer version to compare.



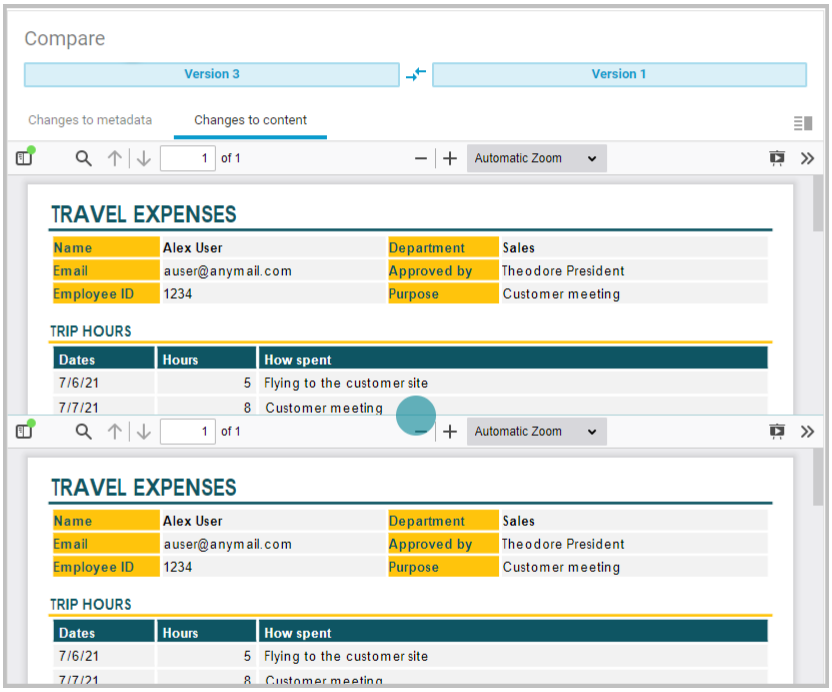
The two versions selected are displayed.

5 To swap the version display, select the swap icon displayed between the version headers.



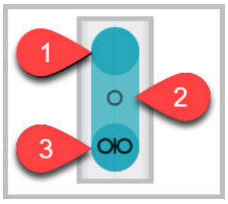
6 A dot displays between the two versions of the document.

a) Double-click the dot to change the view from the default side-by-side comparison to a top-and-bottom view.



b) Double-click the dot to revert back to the previous side-by-side view.

7 Use this dot to see version differences in two different ways. Hover over the dot (1).



The dot expands to show two additional icons. The icons display horizontally or vertically, depending on the view currently displayed.

- The circle icon (2) lets you view the two documents overlaid on each other. The documents quickly switch between older and newer versions so you can see the differences.
- The double-circle icon (3) displays a single document. Drag the dot left and right across the document to see the differences.

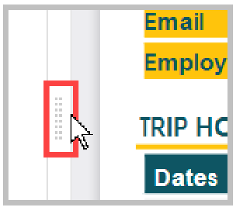
8 To use the circle icon to compare versions:

a) Select the dot (1)

b) Select the circle icon (2) and hold down the mouse button. Above the icon, numbers display and quickly count up to 10.

This action sets how many times the comparison rapidly switches between older and newer versions. The default is 1, and the maximum is 10.

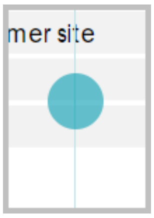
c) Release the mouse button.
The two document versions quickly display one after the other. You can zoom in on areas of the document using the **+** icon, or select and drag the handle on the left of the Compare pane to make the image larger.



d) The default side-by-side view returns after the time you set elapses.

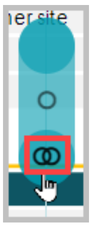
9 To use the double-circle icon to compare versions:

a) Select the double-circle icon (3).
A single document displays with a line extending up and down from the dot.



b) Select the dot and move from side to side to reveal more of one version or the other. You can zoom in on areas of the document using the **+** icon.

c) To return to the default side-by-side view, select the dot and select the double-circle icon again.



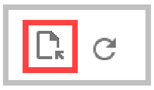
10 You can download both displayed versions locally by selecting the **Actions** menu and then selecting **Download**.

Open current version

When viewing the versions of a file in the Versions window, you can open the most current version of the file.

1 Select any document version from the list in the Versions window.

2 Select the "Open current version" icon.



The display refreshes and the current version of the file displays in the folder where it is located. The properties pane for the file displays on the right side of the window.

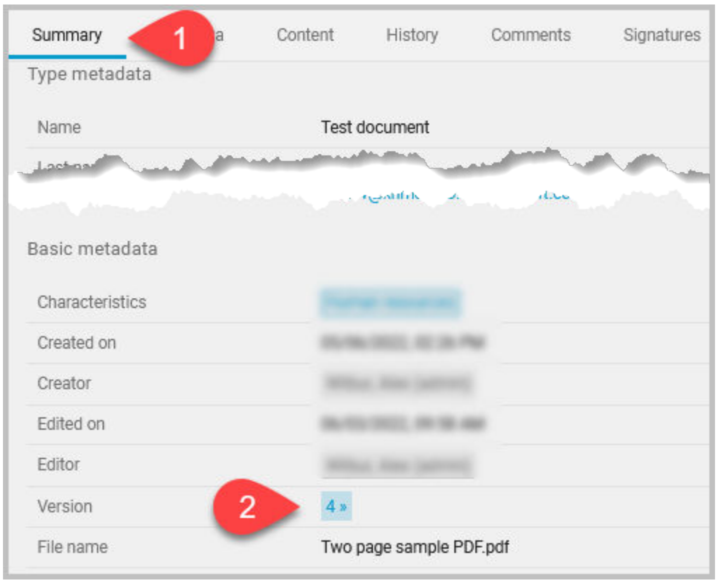
Set as current version

The **Set as current version** feature lets you revert to an older document version. The older version becomes the latest version.

Setting an older version of a document as the current version can only be done in the **Versions** window.

1 Navigate to the location of the file you want to set as the current version by browsing through **Folders** or performing a search.

2 Select the document to display the **Summary** tab (1).



3 In the "Basic metadata" area, the Version (2) indicates how many document versions there are. Select the blue number link.

> There are always at least two versions of a document. The first is the unindexed version, and the second is the indexed version. The first version cannot be restored because an unindexed file cannot exist in Folders.

The Versions window displays and automatically selects the two latest versions to compare the documents.

4. Select the older version of the document you want to become the current version.

   > You cannot select the latest version or an unindexed version to become the current version.

   The right pane refreshes and displays the Summary tab for the selected document.

5. Review the document's summary, metadata, and content to make sure this is the version you want to become the current version.

6. From the **Actions** menu, select **Set as current version**.
   A message displays asking if you are sure you want to set this version as the current version.

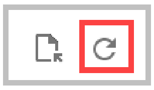
7. Select **Set as current version**.

The version you selected becomes the latest version. In the example image above, there were 4 versions of the document. If I selected version 2 to become the latest version, version 2 now becomes version 5. All previous versions are retained.

Refresh the Versions window

At any time, you can refresh the versions window to ensure that all versions of a file are displayed.

In the Versions window select the Refresh icon.



The display refreshes and all versions of the file displays in the Versions window.

Print a PDF document from the Versions window

When comparing versions of documents using the Compare feature, you can print any selected PDF document in the Versions window.

> You can only print one PDF document version at a time. If you select multiple versions, the Actions menu only allows you to download the file.

1. Select a PDF document from the list in the Versions window.
2. Select the **Actions** menu and then select **Print**.

The printing dialog displays. Select **Print** after making any settings changes.

Download documents from the Versions window

When comparing versions of documents using the Compare feature, you can download any selected document in the Versions window.

1. Select one or two documents from the list in the Versions window.

   You can select a maximum of two documents at a time.

2. Select the **Actions** menu and then select **Download**.
   The selected documents download to your computer.

Create task(s)

The Create task(s) feature lets you create a task for another user or yourself. There are two options available:

- **Single task**: The task is assigned to a single user or for yourself. See *Single task* for more information.
- **Task sequence**: This task is assigned to a list of users in sequence. The task is passed to the next assigned user after a user completes their portion of the task. See *Task sequence* for more information.

After tasks have been created, they are managed in the **Processes** tab. See the *Processes* chapter for more information.

Single task

Use **Create task(s)** to create and start a **Single task** workflow for a single user or yourself. You can include notes, a due date, and a notification when the task is finished.

1. Select one or more documents from **Folders**.
2. Select the **Actions** menu and then select **Create tasks(s)**.
3. Select **Single task** and make entries into the following fields. **Task** and **Recipient** are required fields.
   - **Task**: Enter the name of the task. Create a Task name that informs the recipient of your expectations for the task.
   - **Recipient**: Enter the recipient's name or any part of the recipient's name and select from the presented list. To assign the task to yourself, select **Assign to me**.
   - **Note**: Use the Note field to add additional instructions to the recipient.
   - **Due date**: (Optional) Select the calendar icon and select when the task should be completed. Click **Select** to set the date and time.
   - **Notify when done**: (Optional) Select the check box to receive a notification in the **Finished tasks** tab that the task is complete.

4 Select **Create** to create and start the single task.

The task is assigned and displays in the recipient's **My task**s tab.

Task sequence

Use **Create task(s)** to create and start a **Task sequence** workflow for multiple users. For example, the first recipient in the sequence may be responsible for reviewing that the price entered for a document is correct. The next recipient might check the document to make sure the customer information is correct.

You can add as many tasks as required and reorder, edit, and delete any task. A task name and recipient are required for each task. A due date for each task can be added.

If a due date passes, the date displays in red on the assignee's My tasks tab as a reminder. When the assignee opens a past-due task, the border and some text are displayed in red.

The task passes to the next user in sequence after the previous user finishes their task. You can include yourself as a recipient in a Task sequence.

1 Select one or more documents from **Folders**.

2 Select the **Actions** menu and then select **Create tasks(s)**.

3 Select **Task sequence**.

> If you use the same task and task recipients repeatedly when creating a task, see the *Create*, *Apply*, *Edit*, and *Delete a Task sequence template* topics. You can create reusable time-saving Task sequence templates.

4 For the first task, select **+** and then make entries into the following fields. **Title**, **Task**, and **Recipient** are required fields.

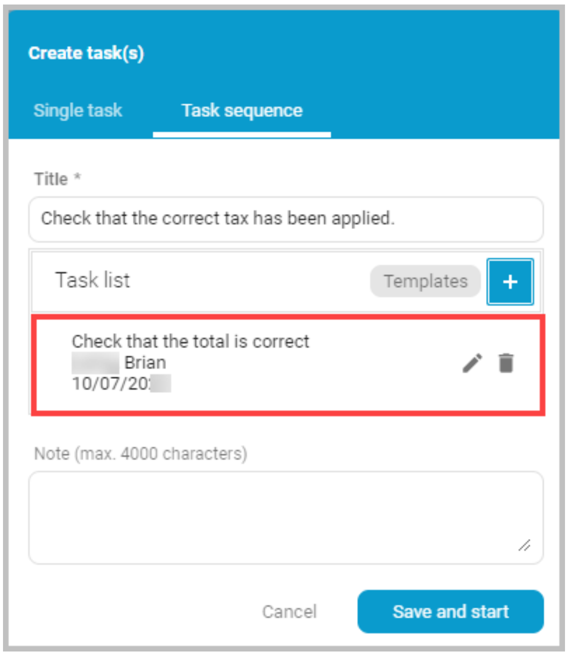
a) **Title**: Enter a title that describes the entire task. The name of the document being used in the task is automatically entered, but can be overwritten.

b) **Task**: Enter the name of the first task. Create a Task name that informs the recipient of your expectations for the task.

c) **Recipient**: Enter the recipient's name or any part of the recipient's name and select from the presented list.

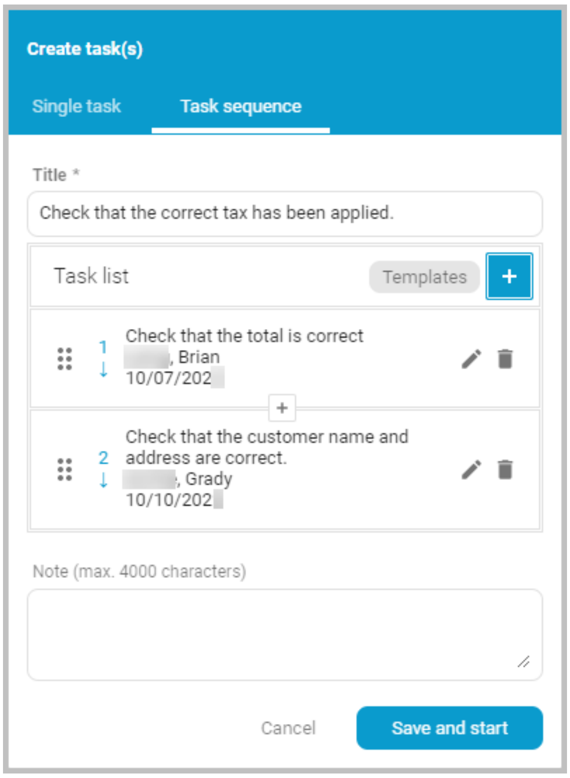
d) **Due date**: (Optional) Select the calendar icon and select when the task should be completed. Click **Select** to set the date and time

5 Select **Add**.
The first task is added to the Task sequence list.



You can edit the task by selecting the pencil icon or delete the task by selecting the trash icon.

6. Select **+** to add another task to the list and make entries into the following fields. **Task** and **Recipient** are required fields.
   - **Task**: Enter the name of the next task. Create a Task name that informs the recipient of your expectations for the task.
   - **Recipient**: Enter the recipient's name or any part of the recipient's name and select from the presented list.
   - **Due date**: (Optional) Select the calendar icon and select when the task should be completed. Click **Select** to set the date and time.
7. Select **Add**.
   The second task is added to the task sequence list.



8 Repeat steps 6 and 7 until you have added all the users and tasks needed for the sequence.

9 A number displays next to each added task. If you have a task sequence out of order, select and drag the handle next to the number to reorder the list.

> If you reorder the Task list, the dates do not automatically update. Edit any tasks that require a due date changed. Select **Save** after making any changes to a task.

10 If you need to add a task between two existing tasks, select the **+** between the two tasks.

a) Enter the Task, Recipient, and optional Due date and select **Add**.

11 Add comments applicable to all the recipients in the **Note** text box.

12 Select **Save and start.**

The Task sequence is assigned and displays in the first recipient's **My tasks** tab. After a recipient completes their task, they select **Pass to next recipient** to indicate their task is complete and the task is passed to the next recipient in the Task list.

Create a Task sequence template

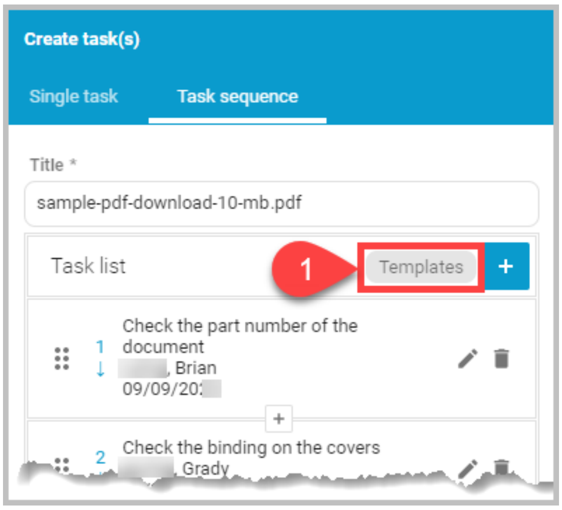
If you repeatedly create task sequences that use the same tasks and recipients, you can create a reusable template that contains the task sequence information. You can create a Task sequence template based on a task sequence you are creating, or you can start with a blank template and build your task sequence there.

Any templates you save are only available to you.

Create a Task sequence template based on the current task sequence

You can create a Task sequence template based on the current task sequence you are building.

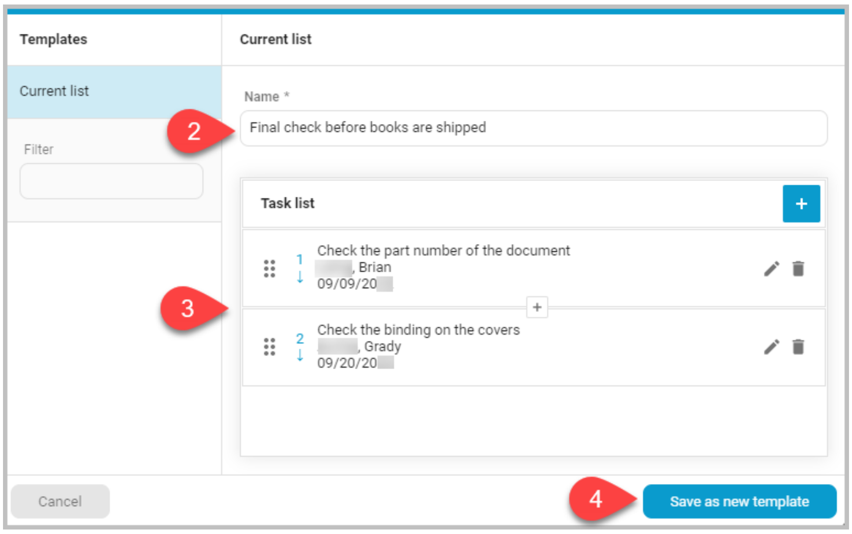
1. Set up the task sequence as detailed in the *Task sequence* topic.
2. Select **Templates** (1).



The Templates window displays.

3. The window refreshes with "Current list" selected by default and displays the task list for the task you were building.

4 Enter a name for the template (2).



5 Check the task list to make sure it is correct. You can edit this template task list (3).

6 When finished, select **Save as new template** (4).
The new template name displays in the Templates list.

7 Select **Apply** to apply the template to the current Task sequence.

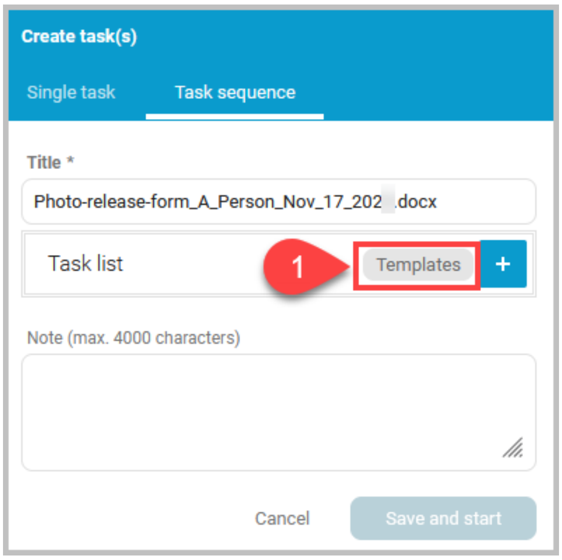
Create a Task sequence template from a blank task list

1 Select a document from Folders to use to create the Task sequence template.

2 Select the **Actions** menu and then select **Create tasks(s)**.

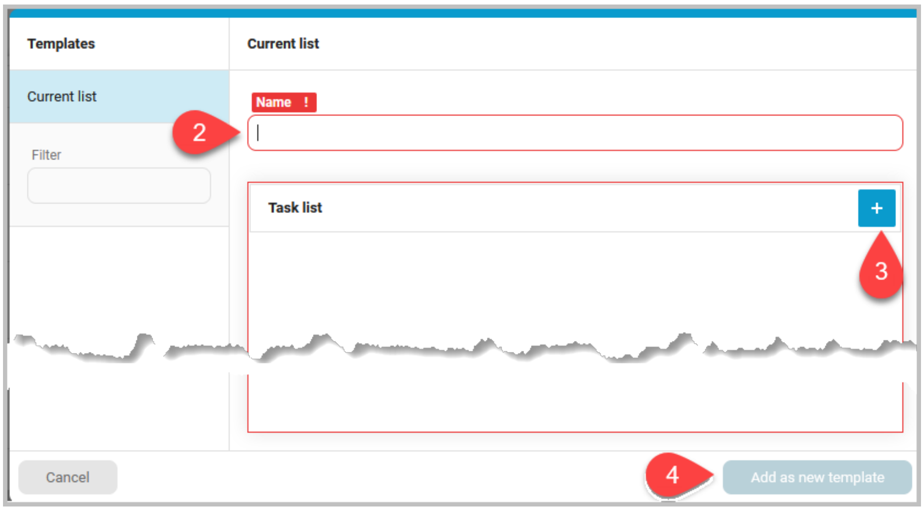
3 Select **Task sequence**.

4 Select **Templates** (1).



The Templates window displays with "Current list" selected by default.

5 Enter a name for the template (2).



6 Select **+** (3) and create the task list.

7 When finished, select **Add as new template** (4).
The new template name displays in the Templates list.

8 Select **Apply** to apply the template to the current Task sequence.

Apply a Task sequence template

You can apply a Task sequence template to a new Task sequence.

1 Select one or more documents or folders from **Folders**.

2 Select the **Actions** menu and then select **Create tasks(s)**.

3 Select **Task sequence**.

4 Select **Templates**.

5 From the Templates list, select the template you want to use for the Task sequence. If the list is long, type part of the template name into the Filter box and select the template.

6 Select **Apply**.
The template tasks are applied to the Task sequence. You can edit the Task sequence that displays.

7 If required, add a note to the Task sequence.

8 Select **Save and start** to begin the Task sequence.

Delete a Task sequence template

You can delete Task sequence templates that are no longer used.

1 Select any documents from **Folders**.

2 Select the **Actions** menu and then select **Create tasks(s)**.

3 Select **Task sequence**.

4 Select **Templates**.

5 From the Templates list, select the template you want to delete. If the list is long, type part of the template name into the Filter box and select the template you want to delete.

6 View the template to check that the task list is the one you want to delete. You can move, delete, or add tasks to the current template.

7 Select **Delete template**.
The template is removed and is no longer available to users.

Request retention

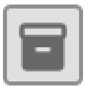
If your organization has activated Retention Management, you can request that documents are retained. Use your organization's archiving / records retention rules to decide if a document should be retained.

Only one document at a time can be set for retention. The Customer Admin or an Administrator sets the retention date for your request.

1 Select one document from **Folders** or the result 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.



- You 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.

Request signature

You can request up to six people sign a `.pdf` or .`docx` document that has been uploaded to KCIM.

The "Request signature" feature is only available if Signatures has been configured by your Customer Admin.

Microsoft `.docx` files are converted to `.pdf` files by the signing service. When returned to KCIM, the signed document is a `.pdf` file.

The signers do not have to be KCIM users. You cannot change the signing service used for signing.

See the *Prepare document for e-signatures* topic for information about how to set up documents for that require signers to sign the document in specific or multiple places. An example of this type of document would be a legal contract.

When you create a signature request, each signer receives an email via the signature service from the person who activated the signature service. The signature request does not come directly from you. Contact your KCIM Customer Admin if you have questions.

In Folders, documents waiting for a signature display the grey "Signing in progress" icon next to the file name.

In Folders, documents with the signature process completed display the green "Signed" icon next to the file name.

Prepare documents for e-signatures

Before sending a document out for e-signatures, make sure that the document you send is ready for signatures.

- For a simple document with one or more signers, where the location of the signatures doesn't matter, make sure there is a location in the document with enough blank (white) space for the signers to sign. Signers can move their signature to an appropriate location in the document.
- If a document requires signatures by one or more signers **at specific locations in the document**, such as a contract, indicate these locations by inserting invisible markers, called **Anchor Strings** into the document. The invisible markers display as "Anchor tabs" (1) to indicate where signatures are needed. Signers select the Anchor tabs to electronically sign the document where their signature is needed.

About Anchor Strings

If you decide to use Anchor Strings for document signatures, note the following:

- Anchor Strings are best used for long documents where multiple signatures are required at specific locations in the document, such as legal documents.
- The minimum length of an Anchor String is 1 character
- The maximum length of an Anchor String is 50 characters
- No RegEx is allowed in the text used for the Anchor String
- Images cannot be signed because the Anchor String cannot be found if embedded within an image
- Spaces are allowed in the text used for an Anchor String
- Sufficient blank (white) space must be left for the signature in the document
- Anchor Strings embedded in the form of a PDF X-Object in the document are not supported
- The Anchor String must be unique for each person who is to sign the document
- Anchor Strings can be used more than once within the document if the same person is required to sign the document in multiple locations. The signature service guides the signer to each signature location in the document.

Create Anchor Strings - Overview

There are four requirements when you want people to sign in specific locations in a document:

1. Obey the information in the *About Anchor Strings* topic.
2. Specify the text in the document to use as the Anchor String.
3. Set the Anchor String to the same color as the background color of the document
4. If there are multiple signers (to avoid duplicating the text in the document), the Anchor String must be unique.

Create Anchor Strings - Example

The examples in this topic are to provide guidance to you when creating Anchor Strings. You can create any Anchor String you want, as long as you are consistent within the document.

The Anchor String must be unique for each person who is to sign the document.

The Anchor Strings can be as simple as the examples used below or as complex as required by your organization.

For example, you must collect an employee's signature on an employment contract. Below is an example of a simple Anchor String you can use to collect the signature:

`#Worker#`

1. Use a # (sharp) symbol to indicate the **start** and **end** of the Anchor String. The symbols ensure that the Anchor String is not confused with text that appears anywhere else in the document.
2. Let's say you need 4 more employee signers on the same document. Using the previous example as a pattern, you can create additional Anchor Strings, one for each signer. The bold text in the examples below indicates the text added to make the Anchor Strings unique.

   You can request a maximum of 6 signatures for any document.

   Employee signature 1: `#Worker#`

   Employee signature 2: `#Worker`**`2`**`#`

   Employee signature 3: `#Worker`**`3`**`#`

   Employee signature 4: `#Worker`**`4`**`#`

   Employee signature 5: `#Worker`**`5`**`#`

   Employer signature: `#`**`Employer`**`#`

   Keep a list of these strings handy. Copy and paste these Anchor Strings to where required in a document if not already present and when you create the signature request in KCIM.

Add Anchor Strings to a document

Now that you have created all the Anchor Strings, you need to add them to a document. You can add the Anchor Strings into existing .pdf documents and existing or new .docx (Microsoft Word) documents.

Add Anchor Strings to a .pdf document - Example

This example procedure adds Anchor Strings to an existing `.pdf` document. Use this process to add Anchor Strings to any existing .pdf document.

Adding the Anchor Strings to an existing `.pdf` document requires software that can edit a .pdf document, such as Acrobat Pro.

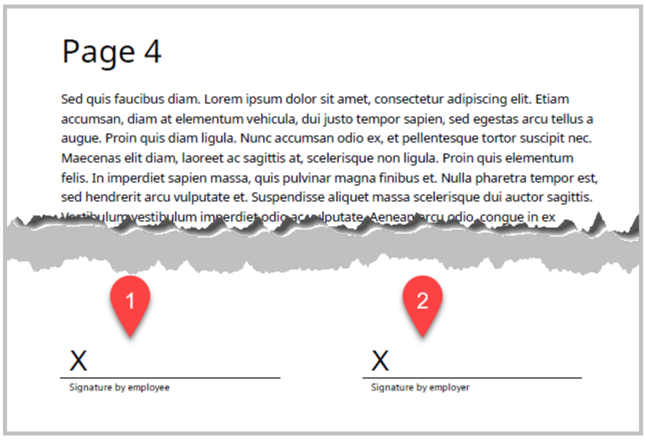
This example shows adding an Anchor String for an employee's signature and another for the employer's signature. This example procedure assumes you already created the Anchor String for both signatures. For this example, the following Anchor Strings were used:

- Employee: `#Worker#`
- Employer: `#Employer#`

1 Open the existing .pdf document in Acrobat Pro or your `.pdf` editing software.

These instructions offer a guideline for making changes to a .pdf document using Acrobat Pro as an example, which may have to be modified, depending on the software you use.

2 Go to the page where the signatures are required. This example shows that the employee's signature is needed at location **1** and the employer's signature at location **2**.

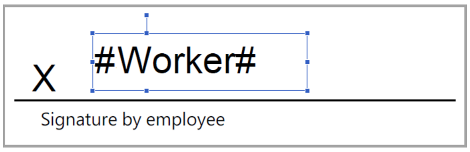


3 Select **Edit PDF**.

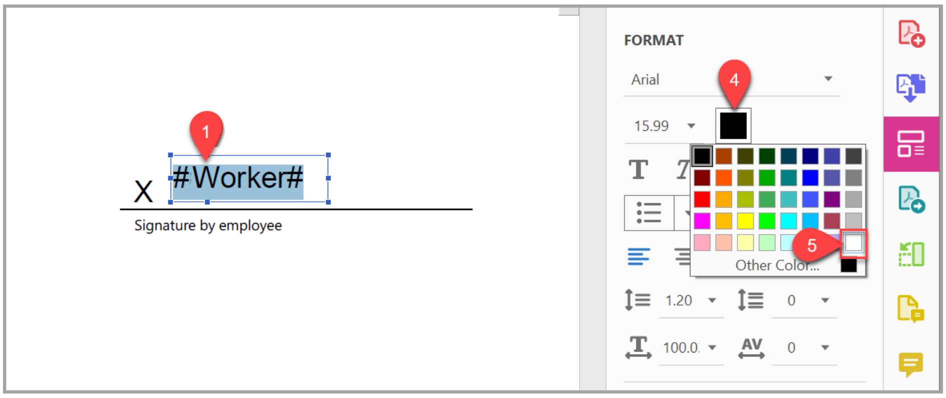
4 From the Edit PDF menu, select **Add Text**.

5 Using the mouse, click where the first Anchor String should be located.

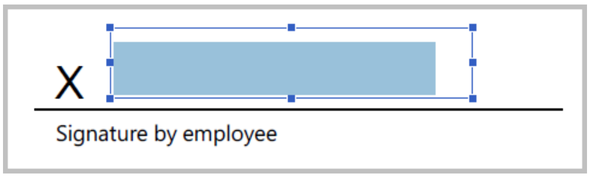
6 Copy and paste the Anchor String into the text box.



7 Select the text you just pasted into the document (3), and then in the FORMAT area, select the font color icon (4). Then, select the white square (5).



The text is changed to white so that the Anchor String does not appear underneath the signature when the document is signed.



8 Repeat steps 4, 5, and 6 to add the Employer signature.

9 Save the `.pdf` document.

The document can now be uploaded to KCIM, and signatures be requested.

Add Anchor Strings to a .docx document - Example

This procedure adds Anchor Strings to a `.docx` document using Microsoft Word. This process can be used to add Anchor Strings to new or existing `.docx` documents.

The steps also explain, as an option, how to add a place to add a signature line so the document can be printed and the document signed with a pen.

> In KCIM, you can only request signatures for any Microsoft `.docx` documents.

This example shows adding an Anchor String for an employee's signature and another for the employer's signature. This procedure assumes you already created the Anchor String for both signatures. For this example, the following Anchor Strings were used:

- Employee: `#Worker#`
- Employer: `#Employer#`

1 Open a `.docx` document in Microsoft Word.

These instructions offer a guideline for making changes to a `.docx` document using Microsoft Word as an example.

2 Go to the page where the signatures are required. This example shows that the employee's signature is needed at location **1** and the employer's signature at location **2**.

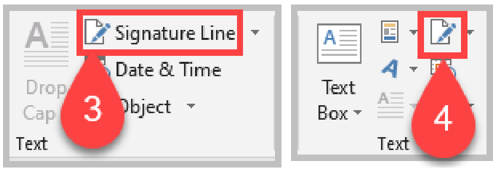
There is no existing signature line in the document.

3 To add the signature line for the employee signature, perform the following steps in Microsoft Word:

a) Click the mouse where you want the signature line to display.

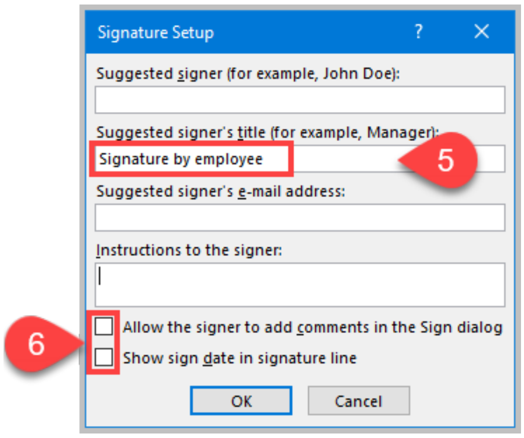
b) On the ribbon, select **Insert**.

c) In the Text area, select the **Signature Line** icon. On a large monitor, the icon displays, as shown in image 3. Small monitors, like laptops, display the icon in image 4.



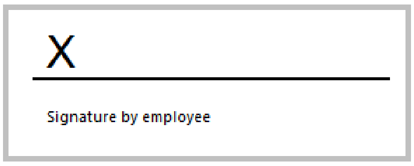
The "Signature Setup" window displays.

d) In the "Suggested signer's title" text box, enter the information you want to display below the signature line in the document. For example, "Signature by employee" (5).



e) Clear the two check boxes at the bottom of the "Signature Setup" window (6).

f) Select **OK**.
The document displays the signature line.

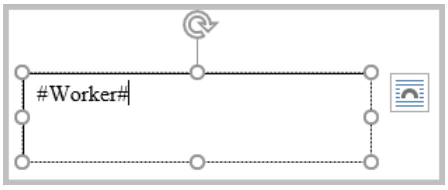


4 Next, you have to insert the Anchor String into a text box:

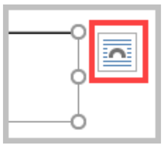
a) Click in the white space either above or below the signature line.

b) On the ribbon, select **Insert**, and from the "Text" area, select **Text Box** > **Simple text box**.
A text box displays on the document page.

c) Copy and paste the Anchor String into the text box.

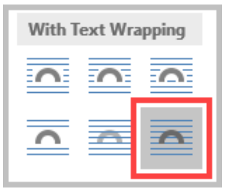


5 On the edge of the text box, select the "Layout options" icon.



The "Layout Options" menu displays.

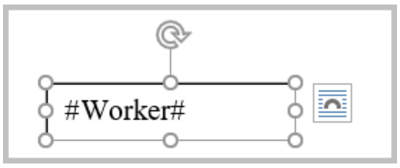
6 In the "With Text Wrapping" area, select the **In Front of Text** icon.



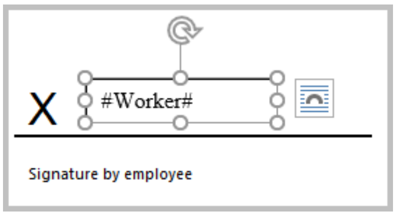
7 Right-click the border of the text box and select **Format Shape**.
The "Format Shape" pane displays.

8 In the "Fill" area, select **No fill** so the signature line displays properly on the page.

9 Resize the text box to make it smaller so that only the Anchor String displays in the text box.

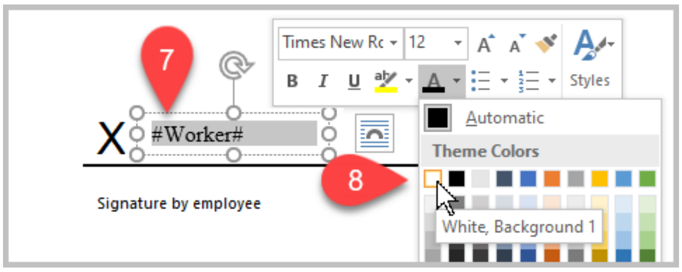


10 Move the text box so that the text box is above the signature line.



11 From the Format Shape pane, select the **Fill & Line** icon and, in the "Line" area, select **No line**.

12 Select the Anchor String, and from the pop-up menu, select white as the font color.



The text is changed to white so that the Anchor String does not appear underneath the signature when the document is signed.

13 Repeat steps 3 through 12 to add the Employer's signature.

14 Save the `.docx` document.

The document can now be uploaded to KCIM, and signatures be requested.

Request one signature

You can request someone sign a document that has been uploaded to KCIM. The signer does not have to be a KCIM user.

The **Request signature** feature is only available if Signatures has been configured by your Customer Admin.

1. Select the document that requires a signature.

   Documents with grey icons in the Status (first column), documents under retention management, or documents that are already signed are not available for signature.

2. From the **Actions** menu, select **Request signature**.
   The "Request signature" window displays. The signature service used for signatures is indicated below "Request signature." You cannot change the signature service used.

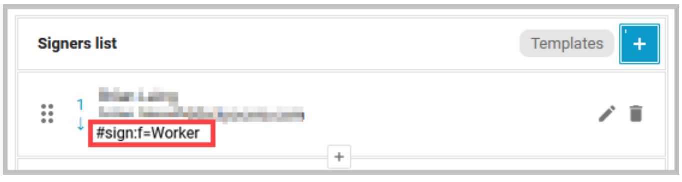
3. In the "Signers list" area, select **+**.

4. Make entries into the following fields. "Signer's name" and "Signer's email" are required.

   - **Signer's name**: Enter the name of who will be signing the document.
   - **Signer's email**: Enter the signer's email address. Make sure the email address is valid for the signer. If this email cannot be reached, the signing service sends an email to the person in your organization that administers the signing service.
   - (Optional) **Anchor String for Signature**: Enter the Anchor String, which indicates where to place a signature tag where someone signs the document. See the *Prepare documents for e-signatures* topic for information about Anchor Strings.

     With one signer, there should be one place in the document with unique Anchor String to indicate the placement of the signature.

5. Select **Add Signer**.
   The added signer displays in the Signer's list. If you added an Anchor String, the string displays beneath the signer's email address.

6. By default, the email subject is the selected document's filename. You can change the email subject to a different subject.

   The body of the email is set by the person in your organization that administers the signing service. You cannot change the body of the email that the signer receives.

7 Make a selection from the "Select a Signature type" menu. The signature types differ in how signers identify themselves with the signature service. Some signature types require higher levels of signer verification.

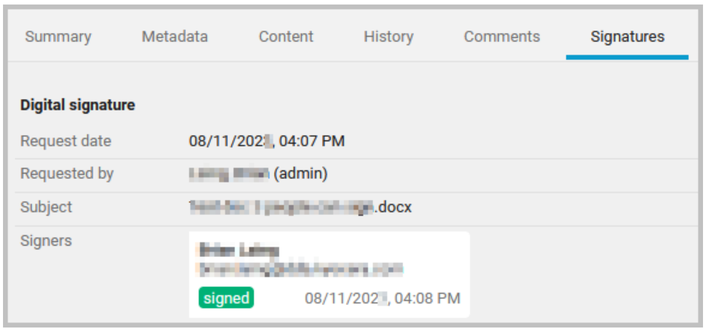
> The available signature types depend on the types your organization has subscribed to from the signature provider. Not all types may be available. Ask your KCIM admin if you are not sure which signature type to use.

8 Select **Request**.

An email from the signing service is sent to the signer.

After the signer signs the document, the signed document is uploaded back to KCIM as a new version of the document.

To monitor a signature request, first select the document from "Folders." Then in the "Properties" area for the document, select the **Signatures** tab.



Request multiple signatures

You can request that up to six people sign a document that has been uploaded to KCIM. The signer does not have to be a KCIM user. You can set the order of the signers.

> The **Request signature** feature is only available if Signatures has been configured by your Customer Admin.

If a document requires signatures by multiple people at specific locations in the document, indicate these locations by inserting invisible markers, called **Anchor Strings** into the document. The invisible markers display "anchor tabs" in the document to indicate where signatures are needed. Signers simply click on these anchor tabs to electronically sign the document where their signature is needed. See the *Prepare documents for e-signatures* topic for information about Anchor Strings.

You can set up signature templates if you repeatedly request signatures from the same recipients. See the *Create a Signature template* topic for more information.

1 Select the document that requires a signature.

Documents with grey icons in the Status (first column), documents under retention management, or documents that are already signed are not available for signature.

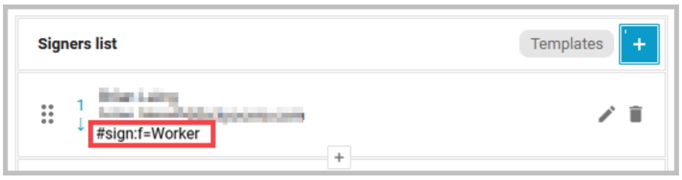
2 From the **Actions** menu, select **Request signature**.
The Request signature window displays. The signature service used for signatures is indicated below "Request signature." You cannot change the signature service used.

3 In the "Signers list" area, select **+**.

4 Make entries into the following fields. "Signer's name" and "Signer's email" are required.

- **Signer's name**: Enter the name of who will be signing the document.
- **Signer's email**: Enter the signer's email address.
- (Optional) **Anchor String for Signature**: Enter the Anchor String for the first signer, which indicates where to display an Anchor tag. See the *Prepare documents for e-signatures* topic for information about Anchor Strings.

5 Select **Add Signer**.
The added signer displays in the Signer's list. If you added an Anchor String, the string displays beneath the signer's email address.

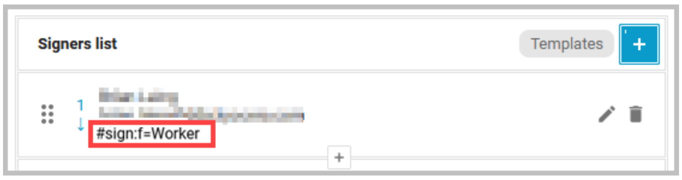


6 To add another signer, select **+**.

7 Make entries into the following fields for the additional signer. Both fields are required.

- **Signer's name**: Enter the name of who will be signing the document.
- **Signer's email**: Enter the signer's email address.
- (Optional) **Anchor String for Signature**: Add the Anchor String for the next signer of the document.

8 Select **Add Signer**.
The added signer displays in the Signer's list. If you added an Anchor String, the string displays beneath the signer's email address.



9 If more signers are to be added, repeat steps 6, 7, and 8. Otherwise, proceed to the next step.

10 The "Signers list" displays the order in which the signers are requested to sign the document. You can edit, delete, or reorder the Signers list.

11 By default, the email subject is the selected document's filename. You can change the email subject to a different subject.

> The body of the email is set by the person in your organization that administers the signing service. You cannot change the body of the email that the signer receives.

12 Make a selection from the "Select a Signature type" menu. The signature types differ in how signers identify themselves with the signature service. Some signature types require higher levels of signer verification.

> Everyone in the "Signers list" uses the same signature type you select.

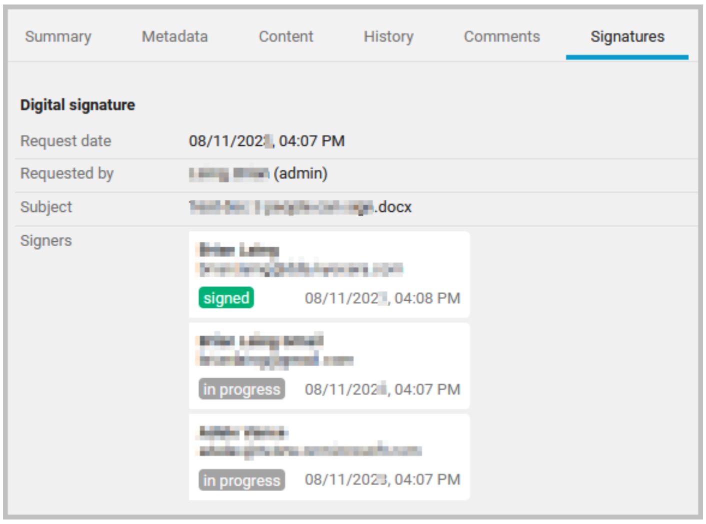
> The available signature types depend on the types your organization has subscribed to from the signature provider. Not all types may be available. Ask your KCIM admin if you are not sure which signature type to use.

13 Select **Request**.

An email from the signing service is sent to the first signer. After a signer adds their signature to the document, the signing service sends the next signer the document.

After the last signer signs the document, the signed document is uploaded back to KCIM as a new version of the document.

To monitor a signature request, first select the document from "Folders." Then in the "Properties" area fo the document, select the **Signatures** tab.



Create a Signature template

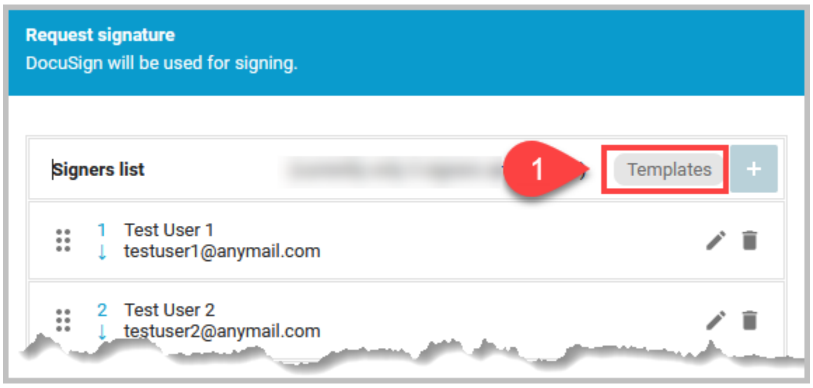
If you repeatedly request signatures for the same recipients, you can create a reusable template that contains the recipient information. You can create a Signature template based on a signature request you are creating, or you can start with a blank template and build your list of recipients there.

Any templates you save are only available to you.

Create a Signature template based on the current signature request

You can create a Signature template based on the current signature request you are building.

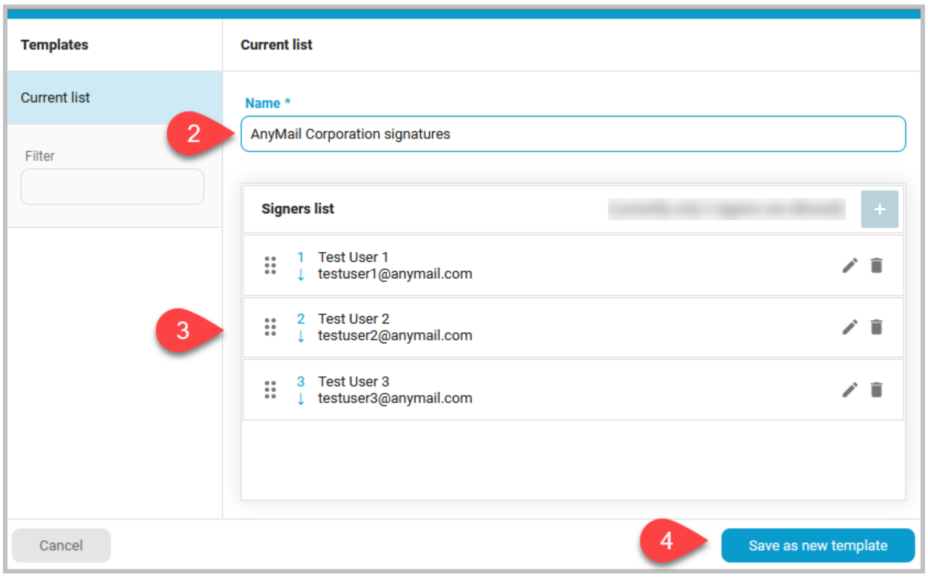
1. Set up the signature request as detailed in the *Request multiple signatures* topic.
2. Select **Templates** (1).



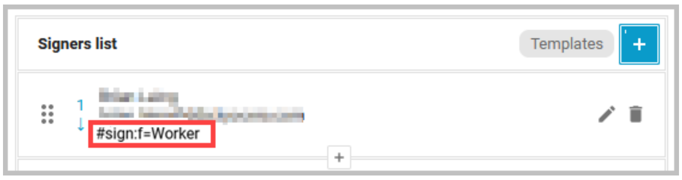
   The Templates window displays.

3. The window refreshes with "Current list" selected by default and displays the "Signers list" for the signature you request you were creating.

4 Enter a name for the template (2).



If you added an Anchor String, the string displays beneath the signer's email address.



5 Check the "Signers list" to make sure it is correct. You can edit this template signers list (3).

6 When finished, select **Save as new template** (4).
The new template name displays in the Templates list.

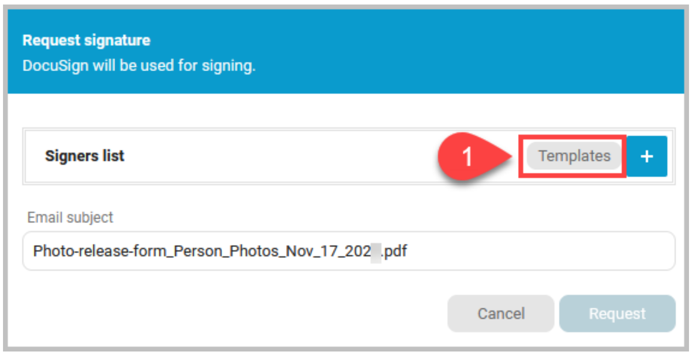
7 Select **Apply** to apply the template to the current signature request.

Create a Signature template from a blank Signers list

1 Select a document from Folders to use to create the Signature template.

2 Select the **Actions** menu and then select **Request signature**.

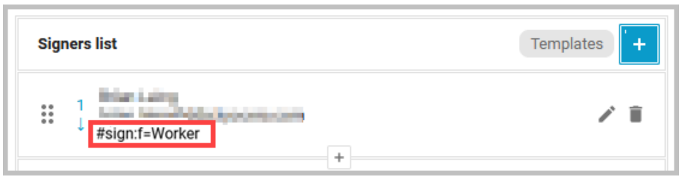
3 Select **Templates** (1).



The Templates window displays with "Current list" selected by default.

4 Enter a name for the template (2).

If you added an Anchor String, the string displays beneath the signer's email address.



5 Select **+** (3) and create the "Signers list." A maximum of six signers can be added.

6 When finished, select **Save as new template** (4).
The new template name displays in the Templates list.

7 Select **Apply** to apply the template to the current signature request.

Apply a Signature template

You can apply a Signature template to a new signature request.

1. Select the document that requires signatures from **Folders**.

   You can request signatures for only one document at a time.

2. Select the **Actions** menu and then select **Request signature**.
3. Select **Templates**.
4. From the Templates list, select the template you want to use for the signature request. If the list is long, type part of the template name into the Filter box and select the template.
5. Select **Apply**.
   The template signers are applied to the signature request. You can edit and reorder the signers from the list that displays.
6. Select **Request** to begin the signature request.

Delete a Signature template

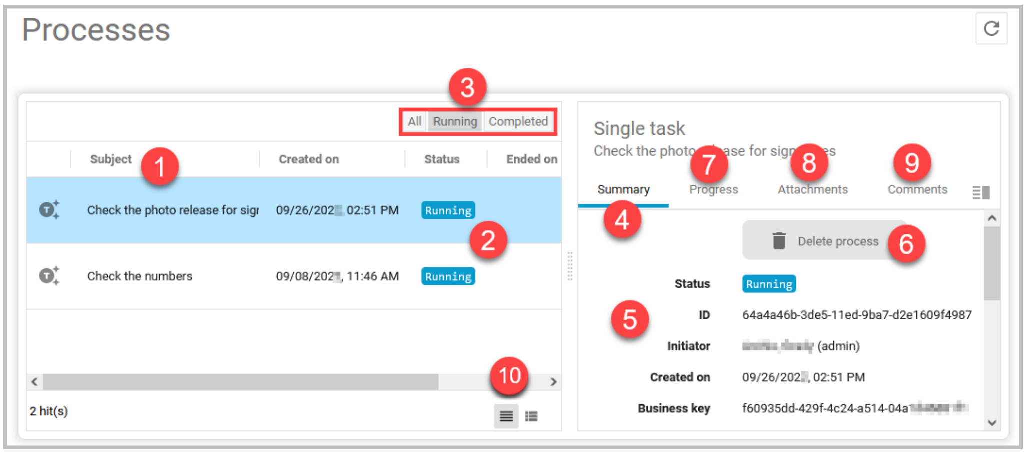
You can delete Signature templates that are no longer used.

1. Select any document from **Folders** that does not display a status icon.
2. Select the **Actions** menu and then select **Request signature**.
3. Select **Templates**.
4. From the Templates list, select the template you want to delete. If the list is long, type part of the template name into the Filter box and select the template you want to delete.
5. View the template to make sure it is the one you want to delete.
6. Select **Delete template**.
   The template is removed and is no longer available.

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.

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 cannot 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)

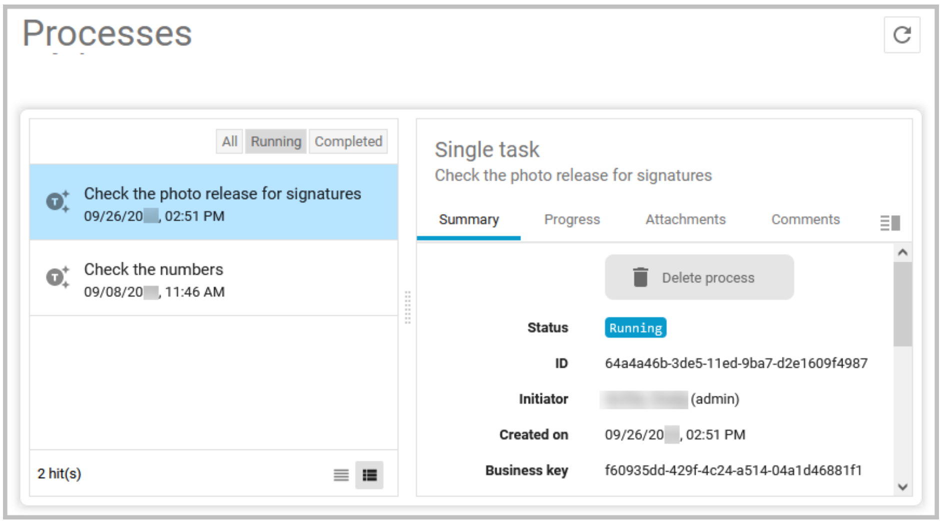
The Comments tab displays comments that were added to the task as opposed to comments that were added to any of the attached documents.

View (10)

Switch between Table and List views.

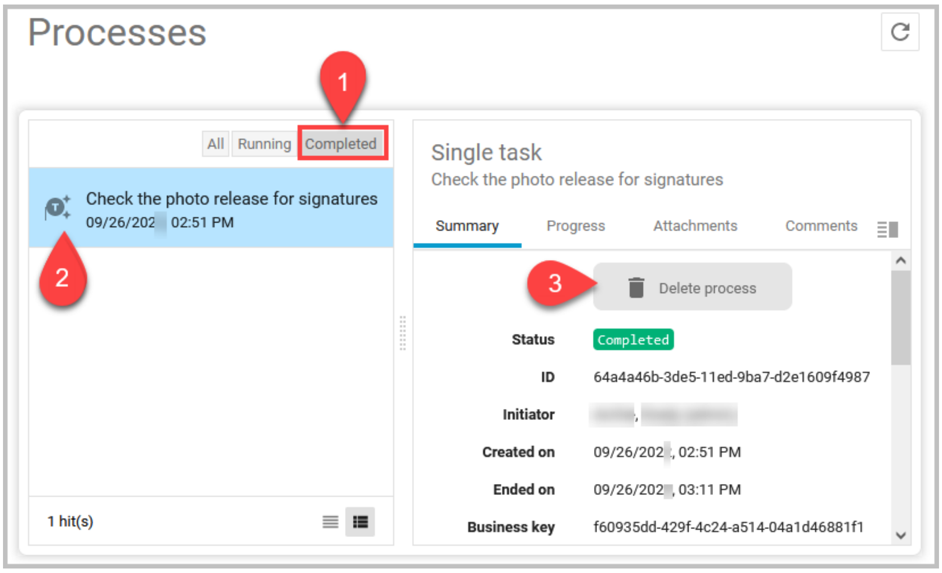
- The Table view includes the date the task was created, current task status, and the date the task ended.
- The List view includes the date and time information but you have to select a task to see the status.

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
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
Ended on
Business key
f60935dd-429f-4c24-a514-04a1d46881f1

8 Using an MFP with KCIM

You interact with KCIM at an MFP (Multi-Function Printer) by using the KCIM MFP client application. The client provides a touch-screen interface to scan documents to KCIM. The MFP can also route incoming faxes to KCIM for indexing.

Log in and log out

To use Kyocera Cloud Information Manager (KCIM) to scan, you must log in to the KCIM MFP client application on an MFP (Multi-Function Printer). When you have finished using KCIM, log out to prevent unauthorized or accidental use of your account.

The KCIM client automatically logs you out of the MFP after a period of inactivity. It is always good practice to manually log yourself out.

Log in

You can use the following method to log in to the KCIM client on an MFP:

- Enter your user name and password.
  - Your account is locked after three failed attempts to log in within 15 minutes.
  - Your account is automatically unlocked after 30 minutes to allow you to retry logging in.
  - If you have forgotten your login information, select the **Forgot password?** link on the KCIM Login window and follow the instructions. See the *About the Log in page* in the *Getting started* chapter for more information.

When you log in on the KCIM client, the system checks if you have agreed to the "End User License Agreement" (EULA) and "Privacy Statement" for KCIM.

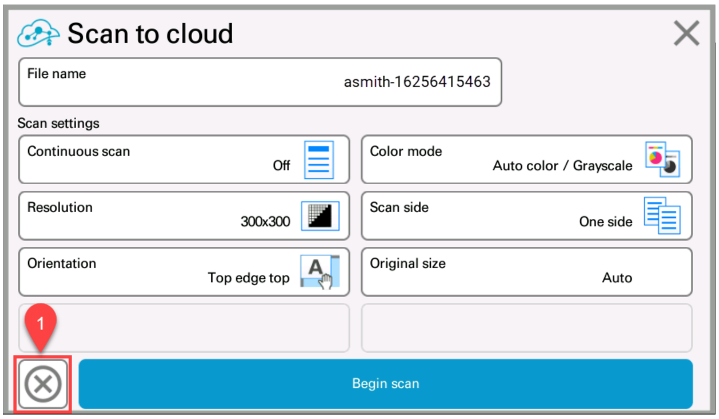
If you have not already agreed to the EULA and Privacy Statement, or there is an update to the statements, an error message displays that you must log in to the Customer Portal using a web browser to indicate your agreement. Any statements you have not agreed to is displayed on the screen immediately after you log in to the Customer Portal. You cannot agree to the EULA and Privacy Statement on the MFP.

After agreeing to the statements on the Customer Portal, return to the MFP and try logging in to the KCIM MFP client application again.

Log out

You can use the following method to log out of the KCIM MFP client application on an MFP:

- Select the **Authentication/Log out** button on the MFP.
- Select the **X** (1) on any KCIM client screen. This also cancels the current job on the screen.



If the MFP authentication mode/function is available, after you are logged out, the Login window displays. The default local username of the MFP is automatically entered in the User Name field. To log in again, enter your user name and password.

Scanning

You can scan documents and have the resulting files saved to Kyocera Cloud Information Manager (KCIM). The following method is available for scanning:

- **Scan to cloud**: Send scanned documents to KCIM

General scanning information

You can configure scan settings before scanning your documents.

OCR accuracy depends on the quality of the PDF document uploaded. Poor character quality, such as low resolution, too small character size, and noise in a document, may affect OCR accuracy. The default settings typically work the best for OCR but these are the recommended settings:

- **Color mode**: Grayscale
- **Resolution**: 300 x 300
- **File format**: PDF

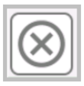
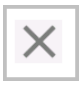
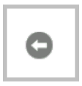
Scan settings include:

- **File name**: (Required) The name of the document when it is uploaded. You can change the default name. The valid name length is between 1 and 128 characters. You cannot use the following characters in the file name:

¥ : ; * ? " < > | , /

- **Continuous scan**: Choose from **On** or **Off**. With the continuous scan option enabled, scan jobs are not sent until **Finish scan** is selected. After selecting **Begin scan**, the printing device scans another batch of pages.
- **Resolution**: 600x600, 400x400, 300x300, 200x200, 200x100
- **Orientation**: Top edge top (default), Top edge left
- **Preview**: Choose from On or Off. Selecting On results in previews of the scans that display on the device screen.
- **Color mode**: Choose from Auto color / Grayscale, Auto color / Black and white, Full color, Grayscale, Black and white
- **Scan side**: Choose from One side, Two sides (flip on long edge), Two sides (flip on short edge)
- **Original size**: Choose the original size of the document to be scanned from the list presented
- **Begin scan**: Start scanning the loaded documents using the current scan settings

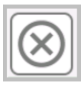
These icons display on the user interface:

Icon	Description
	Cancel the job and / or log out. • If you select this icon after you have started scanning, the job is canceled. • If you select this icon before you start scanning, you are logged out of the device.
	Cancel the job and close the application.
	Return to the Scan settings window from the Preview window.

Scan to cloud

You can send scanned documents from the KCIM MFP client application by using the "Scan to cloud" feature. See the *General scanning information* topic for information about settings and how to use the Continuous scan feature.

1. Go to the MFP where you want to scan your documents.
2. Select the KCIM icon.
   The KCIM log in window displays.
3. Enter your user name and Password and then select **Log in**.
   The **Scan to cloud** window displays.
4. Edit the file name or leave it as the default file name.

5. Edit the scan settings to match the document you are scanning and the output you want.
6. Place your documents in the document feeder.
7. Select **Begin scan**.
   A message displays when the scan finishes.
8. If you selected the **Preview** setting: move through the preview images.
   a) Move through the preview images selecting **<** or **>** to see the next or previous image. This only appears after four or more consecutive scans.
   b) Select a preview image and use the image tools to increase or decrease the size of the image, shift up or down the displayed image, or return to the list of preview images.
   c) You can reject all the scanned images by selecting **X**.
   
9. Once you have finished previewing the scans, select **Send the scanned document**.
10. After the document has been sent to KCIM, select the **X** on the screen or the Authenticate/Logout button to log out.

Your documents are sent to KCIM and are listed on the **Documents to index** area on the KCIM Dashboard. See *Documents to index* for information about next steps after scanning documents.

9 Mobile application

The Kyocera Cloud Information Manager (KCIM) Mobile application lets you take photos of your documents and upload them to KCIM. The uploads are ready for you when you open the KCIM web interface. You can view and manage your upload history on the application.

When you log in using the KCIM Mobile application, the system checks if you have agreed to the "End User License Agreement" (EULA) and "Privacy Statement" for KCIM.

If you have not already agreed to the EULA and Privacy Statement, or there is an update to the statements, a message displays for you to indicate your agreement.

Install and log in to the Kyocera Cloud Information Manager Mobile application

The Kyocera Cloud Information Manager (KCIM) Mobile application is available from the Apple App Store (iOS) and Google Play Store (Android).

You need the KCIM "Organization name" for your organization or company to log in to the mobile application. Ask your admin for the Organization name.

1. Go to the appropriate store to search for and install the following application: **Cloud Information Manager**
2. After the application is installed, open it and log in using the "Organization name" for your organization or company, your KCIM username, and password.

Upload

You can take photos of documents and upload them to Kyocera Cloud Information Manager (KCIM) using your mobile device.

Photos are uploaded as PDF documents. OCR accuracy depends on the quality of the PDF document uploaded. Poor character quality, such as low resolution, too small character size, and noise in a document, may affect OCR accuracy.

1. Open and log in to the KCIM Mobile application on your phone.
2. Select **Upload**.

   The first time you use the application, you are asked to provide permission to take photos.

The camera activates for you to take a photo of a document.

3. Take a photo of the document you want to upload. You can toggle the flash to auto or off from the camera screen. You can zoom in or out using a 2-finger pinch.
4. Select the icon at the bottom of the window to upload a PDF version of the photo to the KCIM server.
   A message displays that the photo is uploaded to the server.
5. If you want to take more photos and upload them, select **Upload another** otherwise, select **Done**.

The photos of documents you uploaded are available in the "Documents to index" area when you next log in to the KCIM web interface.

History

You can view and manage the PDF renditions of your documents stored on your Kyocera Cloud Information Manager (KCIM) Mobile app and uploaded to KCIM.

1. Open and log in to the KCIM Mobile application on your mobile device
2. Select **History**.
   A list of PDFs display. Next to each PDF icon is the PDF file name, date of upload, and file size. You can sort the list.
3. To view a PDF from the History list:
   a) Select the PDF to view the file.
   b) Pinch two fingers together or apart to adjust the zoom.
   c) Double tap the screen to return to the default zoom.
   d) Tap the back button to return to the History list.
4. Use the file deletion method for your device's operating system to remove items from your mobile device. For example, swipe left to delete a single PDF.

PDFs deleted from the mobile app are not deleted from KCIM

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

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