

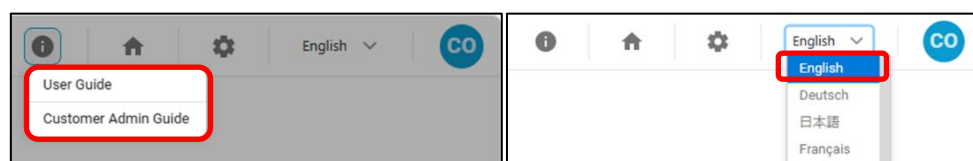
Kyocera Cloud Information Manager Startup Guide

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Introduction

This guide is a supplementary document for Kyocera Cloud Information Manager **Customer Admin Guide** and **User Guide**. Please refer to **Customer Admin Guide** and **User Guide** for information not covered in this guide. **Customer Admin Guide** and **User Guide** can be found by clicking the information icon (i) in the upper right of each screen. If you want to change the language, use the language setting button in the upper right of each screen.



1. Target

This guide is intended for administrators of companies or organizations that use Kyocera Cloud Information Manager.

2. Version

Kyocera Cloud Information Manager v2.5 or later

3. Objectives

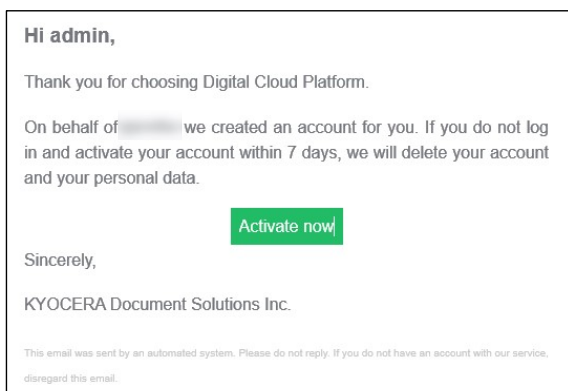
This guide describes the necessary preparation and setting procedures to facilitate the setting up process of Kyocera Cloud Information Manager.

4. Startup procedures

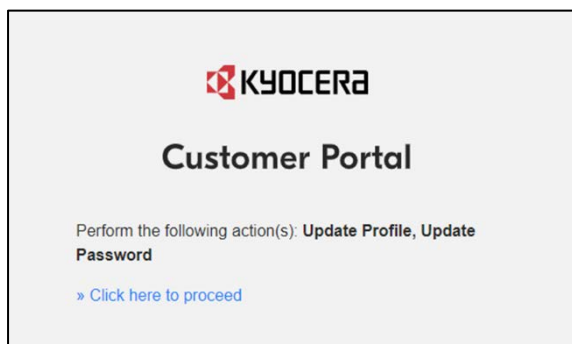
4.1 Activate your account

1. After you apply to start using Kyocera Cloud Information Manager (KCIM), you will receive the following email from Kyocera. Click **Activate now**.

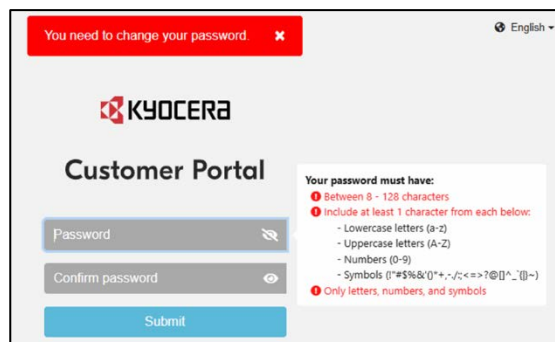
- ※ If the activation process is not completed within seven days, your account is deleted. For organization representative account, you will have to request a new account from your provider. For user account, you will have to request a new account from your administrator.



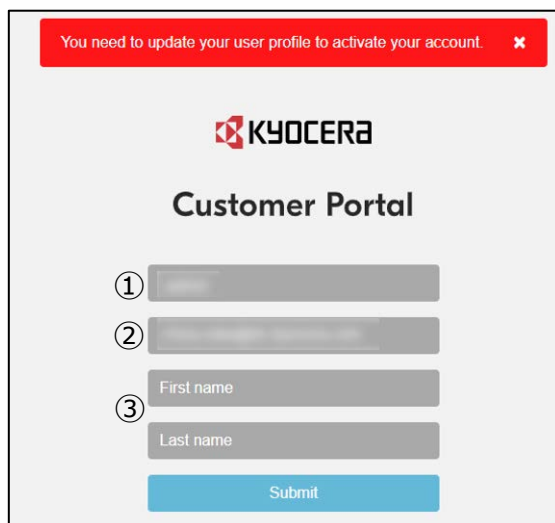
2. The following browser window opens. Click **Click here to proceed**.



3. **Password setting** screen appears. Follow the instructions on the screen to set the password and click **Submit**.



4. The user profile setting screen appears. Enter the information as shown on the screen. The **Username** and **password** are used to log in.



- ① **Username** (Between 8 - 64 characters)

Username to use for login.

- ※ The initial value is displayed as the username, but you can change it as you like. Note that the registered username and the following symbols cannot be used:

```
\ / : , ; * ? " < > | [ ] { } $ %  
' & ( ) + =
```

- ② **Email address**

The Email address from step 1 is automatically displayed.

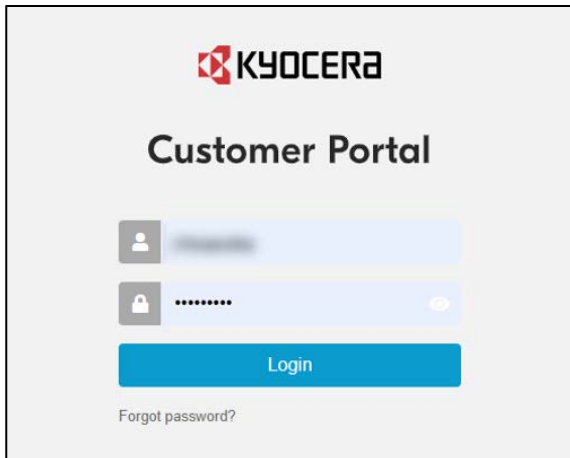
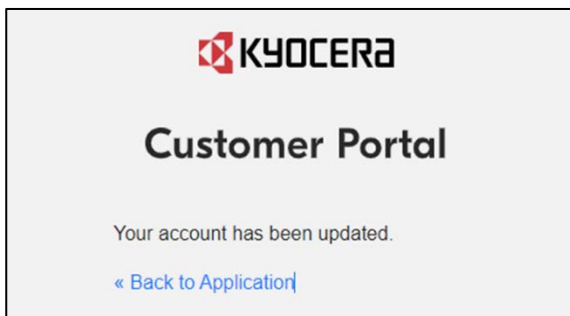
※ You can only create one account per email address.

➤ ③ **First name/Last name** (64 characters or less)

Displays first name and last name in that order.

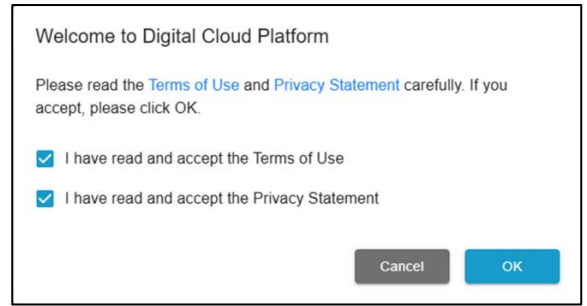
5. When the following screen appears, your account information is updated and your account activation is complete.

Click **Back to Application** to go to the **Customer Portal login screen**.

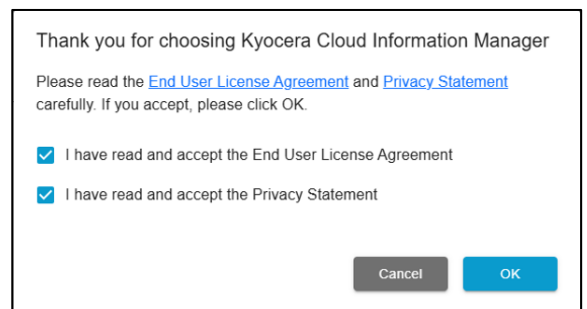


※ If you bookmark this login screen in your browser, you'll have easier access to the **Customer Portal** next time.

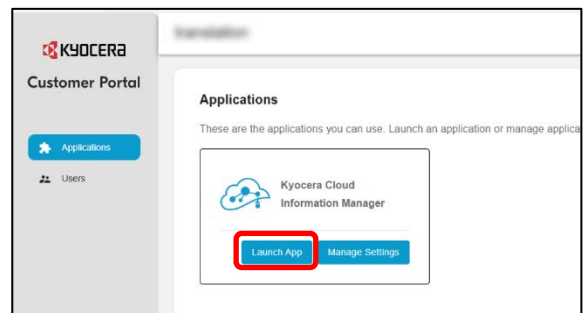
6. The following screen appears. Click on the **Terms of Use** and **Privacy Statement** (separate windows will open). After reviewing the content, check the accept check box and click **OK**.



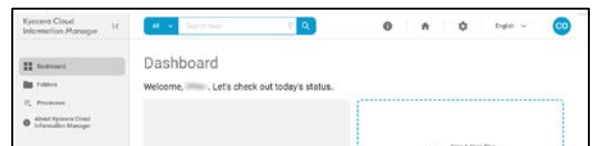
7. In addition, the following screen appears. Click on the **End User License Agreement** and **Privacy Statement** (separate windows will open). After reviewing the content, check the accept check box and click **OK**.



8. When you log in, the **Applications** screen opens. Click **Launch App** of **Kyocera Cloud Information Manager**.

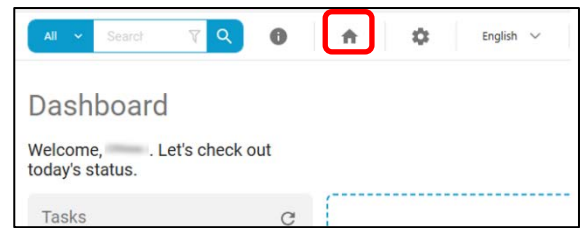


9. KCIM opens.



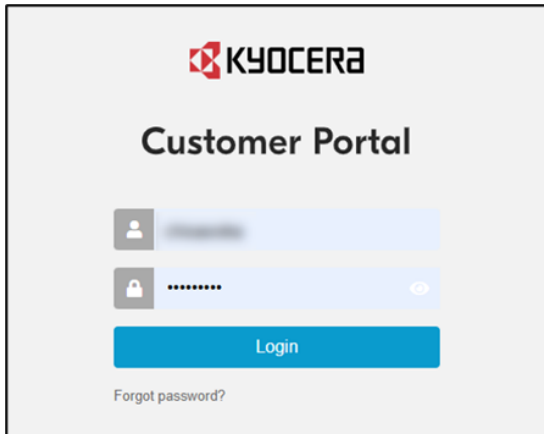
※ If you bookmark this KCIM web portal screen in your browser, you will be able to access KCIM directly next time.

- Continue adding users. Click the **home** (🏠) icon to return to the **Customer Portal**. Read the following descriptions.

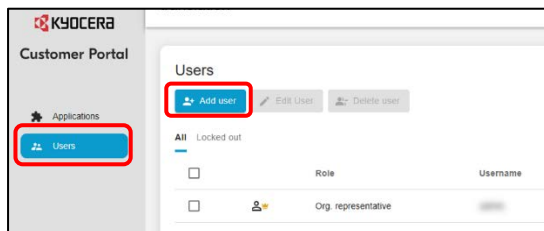


4.2 Add user (Organization representative/Customer admin)

- Log in to **Customer Portal**. If you are already logged in, go to step 2.



- Select **User**. You will see a list of users registered in your tenant. Select **Add user**.



- The **Add user** screen appears. Enter the **Username**, **First name**, **Last name**, **Email address**, and select the user's **Role**.

 A screenshot of the 'Add user' form. The form is titled 'Add user' and contains the following fields:

- ① Username: A text input field.
- ② First name: A text input field.
- ③ Last name: A text input field.
- ④ Email address: A text input field.
- Role: A section with two radio button options: 'Administrator' and 'User'.

 At the bottom right of the form are 'Cancel' and 'Add' buttons.

- ① **Username** (Between 8 - 64 characters): Required
Username to use for login.
*Note that the registered username and the following symbols cannot be used:

```
\ / : , ; * ? " < > | [ ] { } $ % ` & ( ) + =
```
- ② **First name/Last name** (64 characters or less): Required
Displays first name and last name in that order.
- ③ **Email address** (Between 6 - 132 characters): Required
*You can only create one account per email address.
- ④ **Role**: Required
Organization representative: You can set only one

representative for the tenant among the administrators. Has the same access privileges as an administrator. (This cannot be selected when adding a user.)

Administrator: Has access to all features.

User: Cannot access the User page.

(See **Chapter 5: Users** in the **Customer Portal Admin Guide** for more information.)

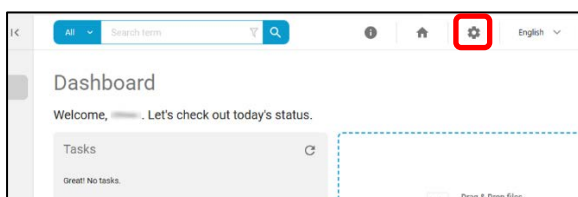
- After entering the required information, click **Add**. A new user is added to the list of users.

Set document class permissions

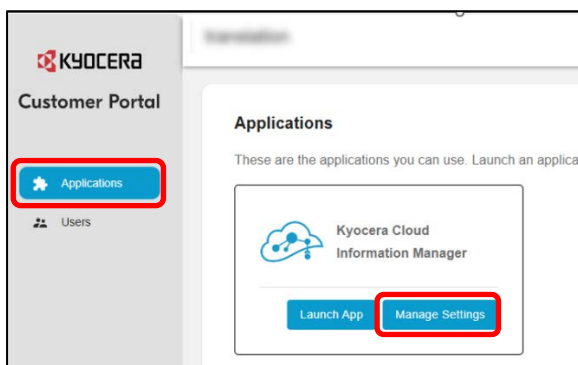
Note: Organization representative user (admin) and newly added users do not have access to the document class yet. Setting permissions enables them to select the document classes that are allowed when indexing. Read the following for instructions on setting access permissions.

- Open the Settings in the KCIM application.

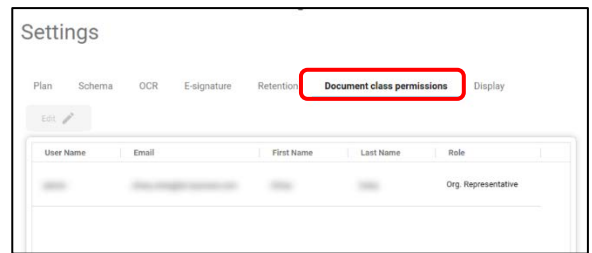
From KCIM



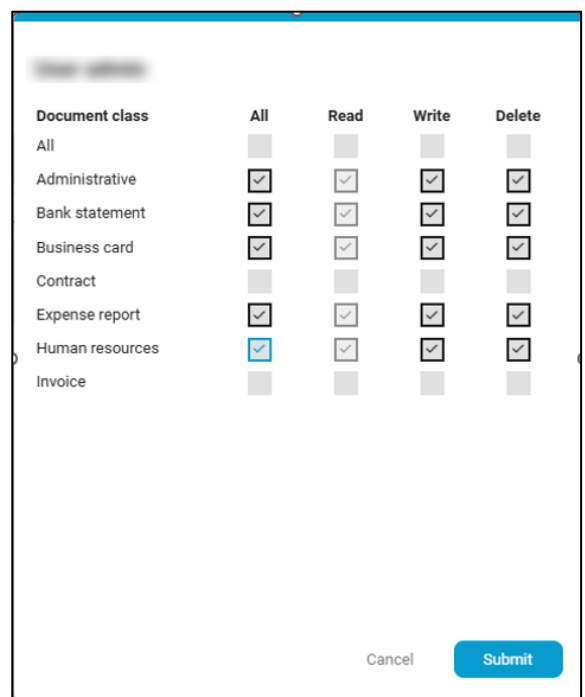
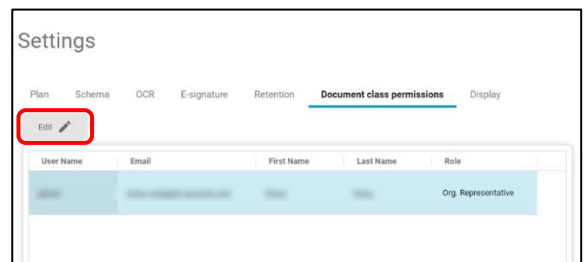
From Customer Portal



- You can set access permissions to the document class. Click **Document class permissions**.



- The list of user appears. Select any user to **Edit**.



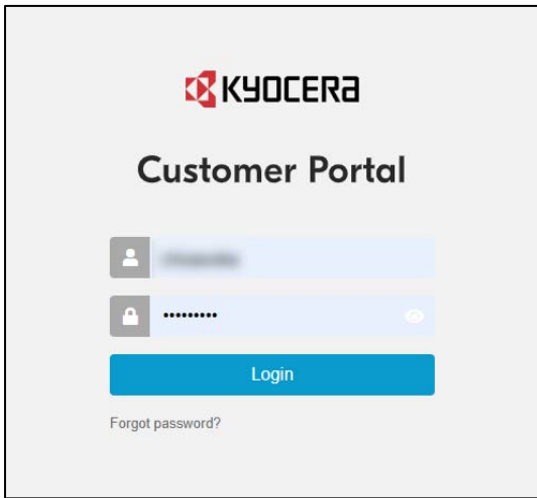
The document class is already set by default. If the content is not sufficient or you want to modify it, refer to [5.1 Configure document classes and attributes](#).

For more information, see **Chapter 3: Getting started** in the **Customer Admin Guide**.

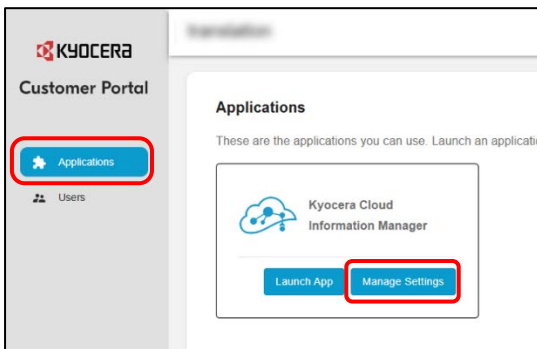
4.3 Activate Retention Management (Organization representative/Customer admin)

The Retention Management feature cannot be deactivated after it has been activated. Make sure you want to use this feature before activating it. (For more information about this feature, see **Chapter 8: Activate Retention Management** in the **Customer Admin Guide**.)

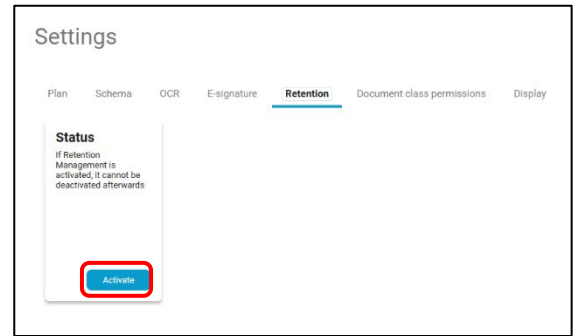
1. Log in to **Customer Portal**.



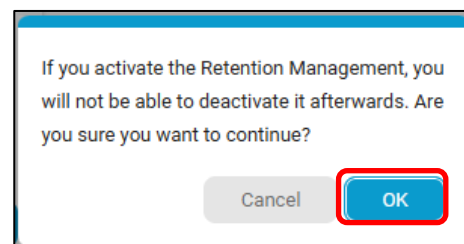
2. On the **Applications** screen, click **Manage Settings** of **Kyocera Cloud Information Manager**.



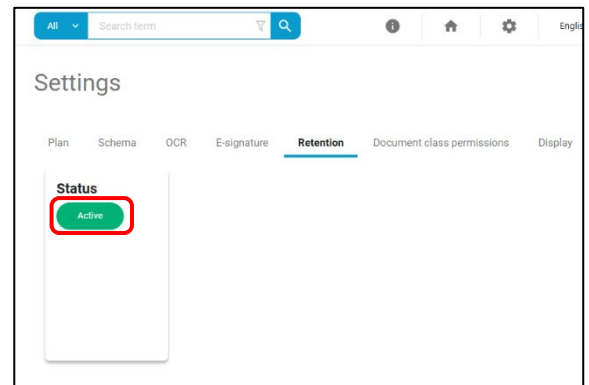
3. KCIM **Settings** screen opens. Click **Retention Management** > **Activate**.



4. The following confirmation screen appears. Confirm the contents and select **OK**.



5. When the Status of **Retention Management** shows **Active**, the activation of Retention Management is complete.

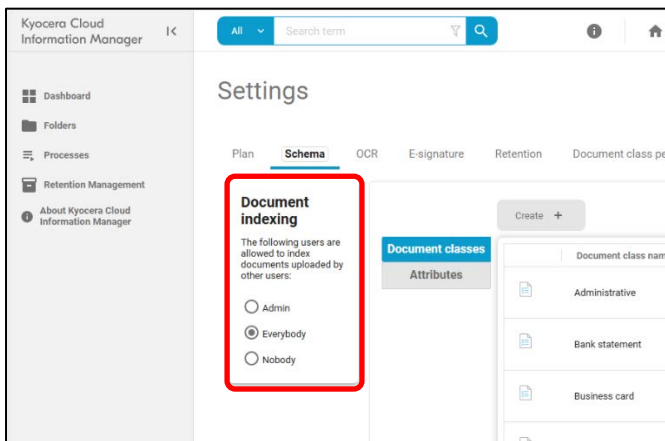


4.4 Set document indexing (Organization representative/Customer admin)

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

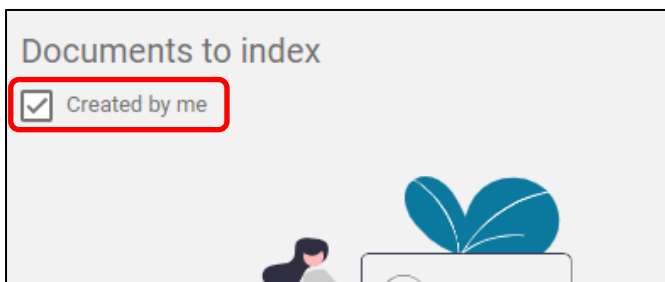
Change the indexing feature

On the **Settings** screen, under **Schema > Document indexing**, administrators can select one of three types of users who can index documents uploaded by other users:



Admin

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



Everybody

All users can view and index documents uploaded by any user. The **Created by me** check box () displays in the **Documents to index** area on the Dashboard.

Nobody (default)

All users, including Admins, can only view and index documents that they have uploaded. The **Created by me** check box does not display in the **Documents to index** area on the Dashboard.

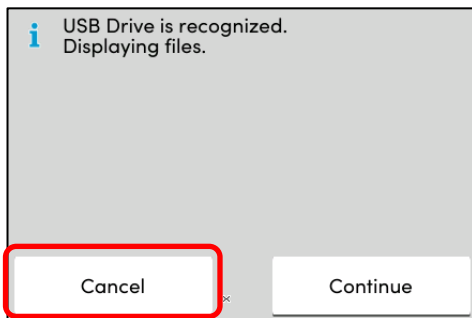
For more information, see the KCIM Web Portal, click **i** in the upper right of the screen, and refer to the **Customer Admin Guide**.

Note: To use the [Fax integration function](#), you need to change the setting to either **Admin** or **Everybody**. With the default setting (**Nobody**), documents uploaded using fax integration cannot be indexed.

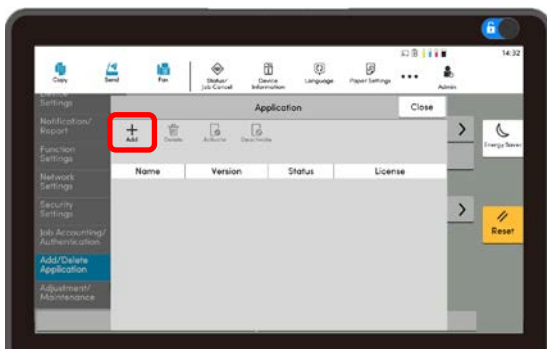
4.5 Install HyPAS application to MFP (Organization representative/Customer Admin)

The screen and setting procedure may differ depending on the model of MFP.

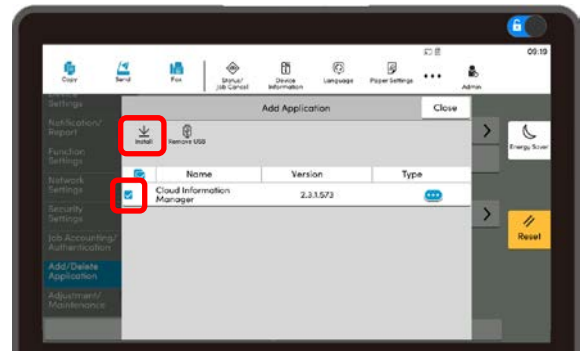
1. Save the supplied HyPAS application (CloudInformationManager_x.x.x.x.pkg) to the root of the USB drive. ※ Be sure to prepare a USB flash drive that has been formatted easily on a PC.
2. Insert the USB flash drive into the USB flash drive slot of the MFP. When the USB drive is detected, the following message will appear. Tap **Cancel**.



3. From the operation panel of the MFP, select System menu > Add/Delete Application > Add/Delete Application to display the application list screen. Tap **Add**.

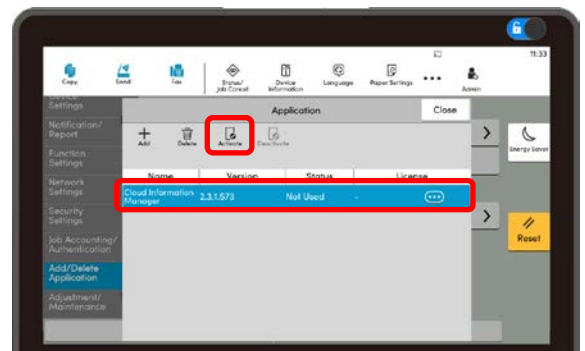


4. A list of HyPAS applications saved on the USB drive appears. Select **CloudInformationManager** and tap **Install**.



When installation is complete, **Cloud Information Manager** appears in the application list.

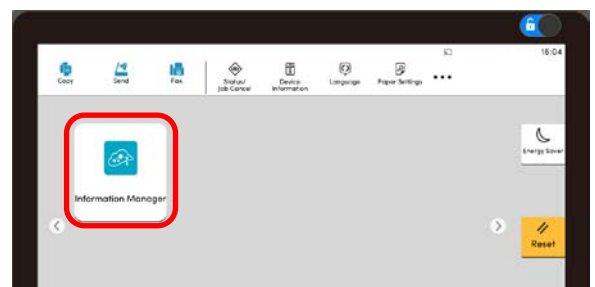
5. On the application list screen, select **Cloud Information Manager**, and then tap **Activate**.



If startup is successful, the Status of **Cloud Information Manager** becomes **Running**.

Name	Version	Status	License
Cloud Information Manager	2.3.1.573	Running	Official

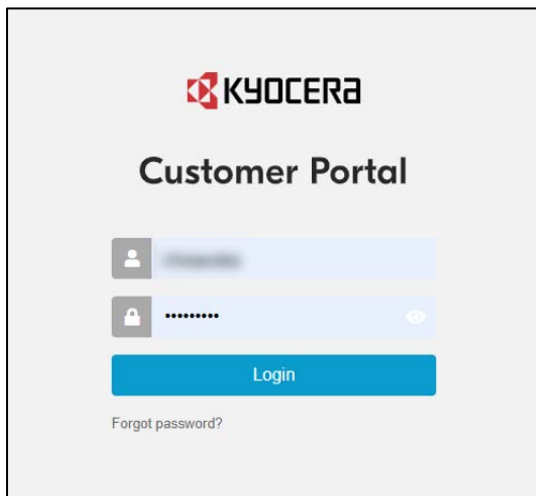
6. Press the **HOME** key on the MFP. If the HyPAS application is installed correctly, the KCIM application icon appears on the HOME screen.



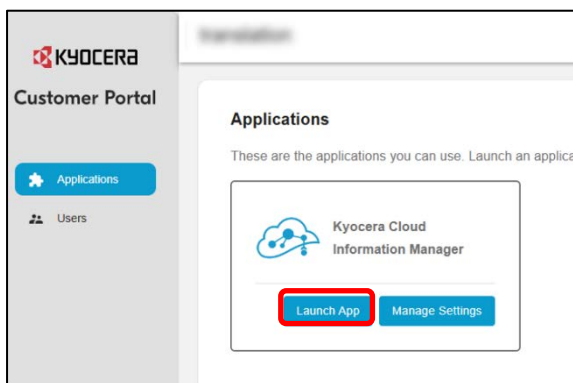
The HyPAS application installation is complete.

4.6 Configure the HyPAS application (Organization representative/Customer admin)

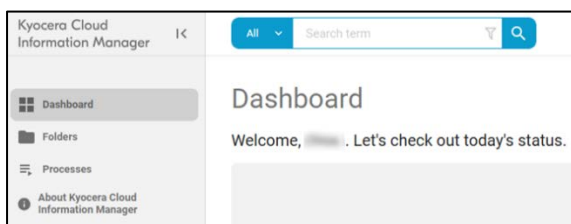
1. Log in to **Customer Portal**.



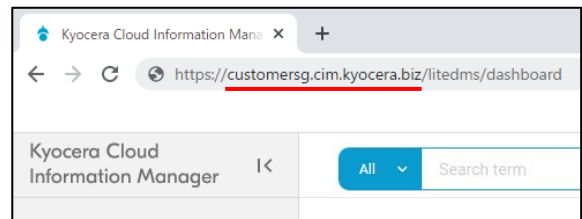
2. On the **Applications** screen, click **Launch App** of **Kyocera Cloud Information Manager**.



3. KCIM opens.

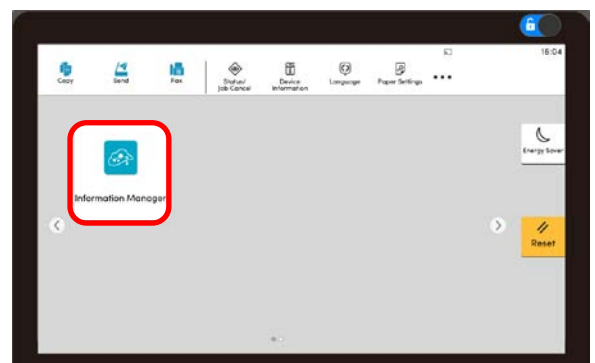


4. Verify the **Organization name** required to configure the **HyPAS application** (will be used in step 6) from the URL of the **Dashboard** screen.

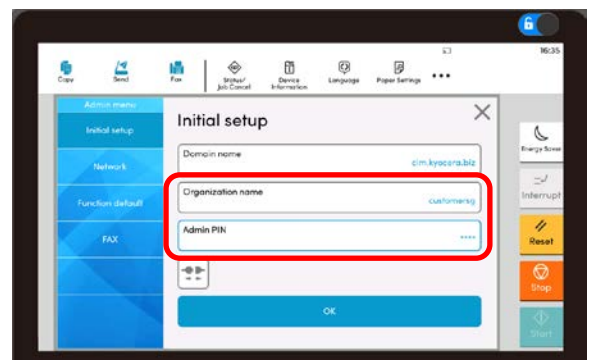


Ex.) If the URL of the **Dashboard** window is customersg.cim.kyocera.biz, set **customersg** (set uniquely for each company or organization) as the organization name.

5. Press the **HOME** key on the MFP. Tap the **Cloud Information Manager** icon on the **HOME** screen.



6. The **Initial setup** screen appears. Enter the **Organization name** verified in step 4 and, if necessary, the **Admin PIN***. **You do not need to change the domain name since it is automatically entered according to the region of your MFP.**



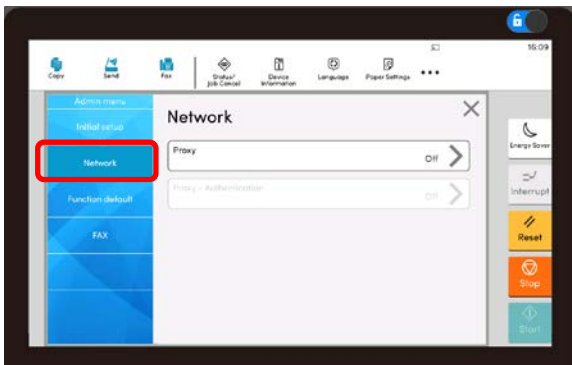
* **Admin PIN** (4-digit number):

Optional

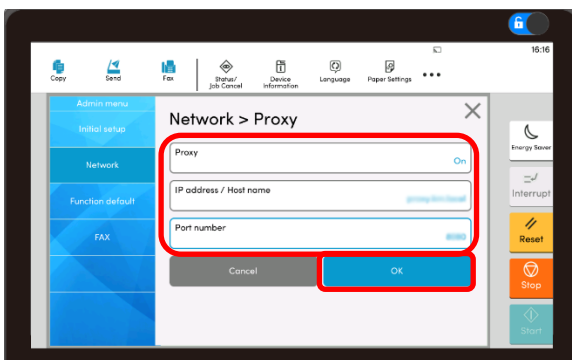
After the initial setup, customer admin can log in to the **Admin menu** by using the MFP administrator account or **Admin PIN**.

The following procedure is for using a MFP in a proxy environment. If you are not using a MFP in a proxy environment, go to step 10.

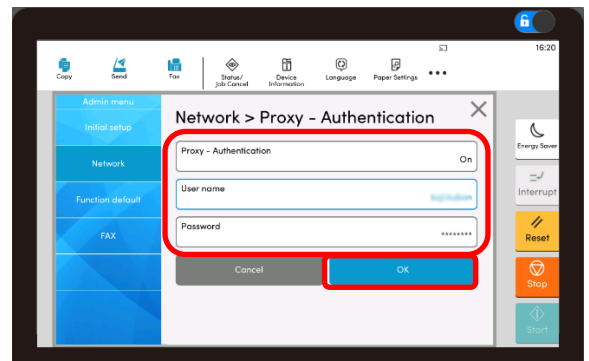
7. Select **Network**.




8. Tap the **Proxy** to turn it **On**. It will be possible to enter the **IP address/Host name** and **Port number**. Enter them correctly and tap **OK**.

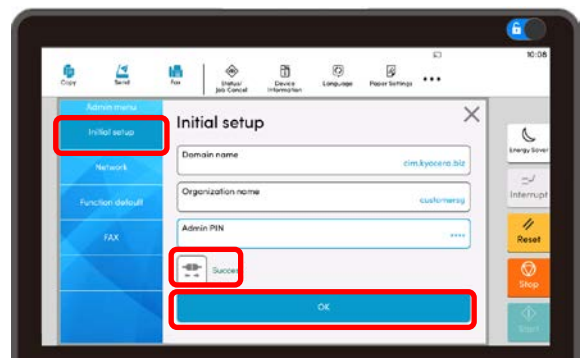



9. If **proxy authentication** is required, tap **Proxy - Authentication** to turn it **On**. It will be possible to enter the **Username** and **Password**, so enter them correctly and tap **OK**.

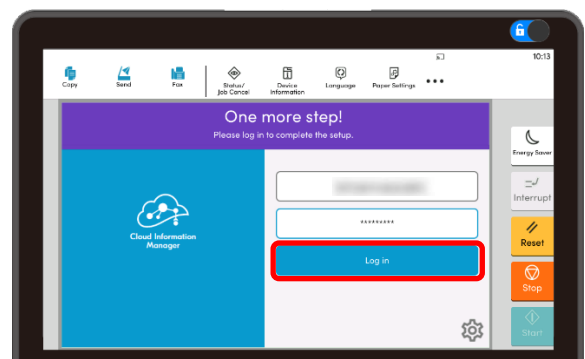


This completes the proxy settings.

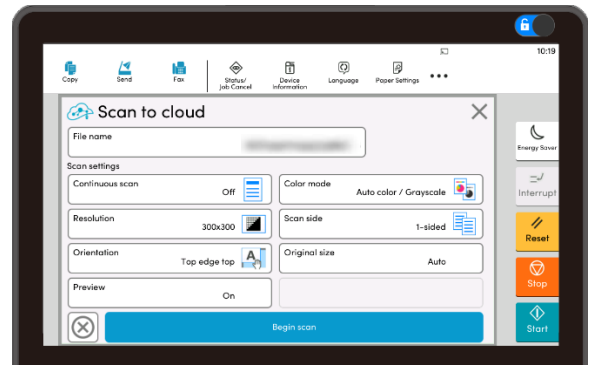
10. Tap the **Initial setup** to display the Initial setup screen. Tap  to test the connection. If the connection result shows **Success**, you have successfully connected to the server. When the connection is successful, tap **OK** to save the settings.



11. Tap  to go to the **Login screen** from the **Admin menu**. Enter **Username** and **Password** and tap **Login**.



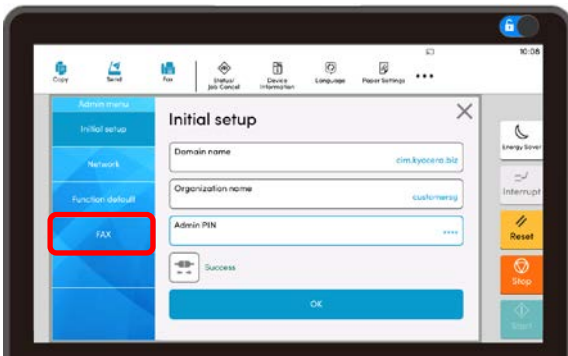
12. When the following message or the Scan to Cloud setting screen appears, the setting of HyPAS application is complete. Tap **X** to close the message.



Tap **X** to log out or **X** to exit the application.

4.7 Configure FAX integration of HyPAS application (Organization representative/Customer admin)

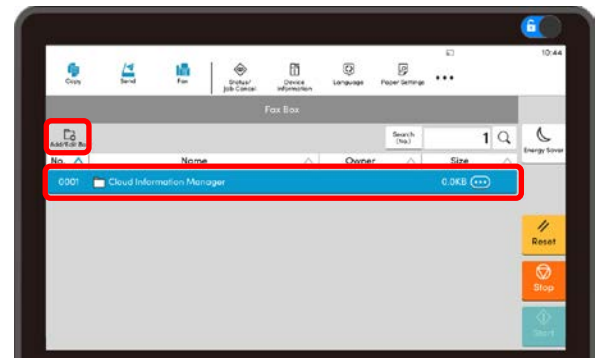
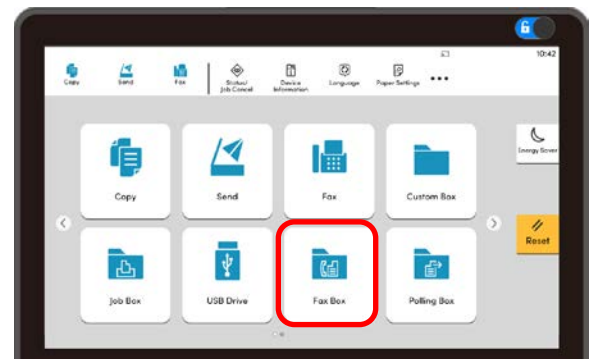
Note: FAX integration function may not be available in some countries or regions. For details, please contact your distributor. If **FAX** is displayed in the admin menu as shown in the following screen, you can use it.



This section assumes that you have completed [4.5 Install HyPAS Application to MFP \(Organization representative/Customer Admin\)](#) and [4.6 Configure the HyPAS application \(Organization representative/Customer admin\)](#).

When you install the HyPAS application on a MFP, **Cloud Information Manager FAX Box** is automatically created in the **FAX Box**. Documents stored in this FAX Box are automatically uploaded to the KCIM server and a backup file of

the uploaded scan document is stored in the FAX Box.

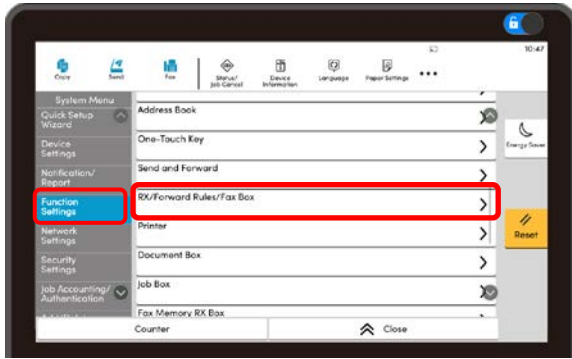


※ Browsing the **Cloud Information Manager FAX Box** requires a password. (Password CIM#1478)

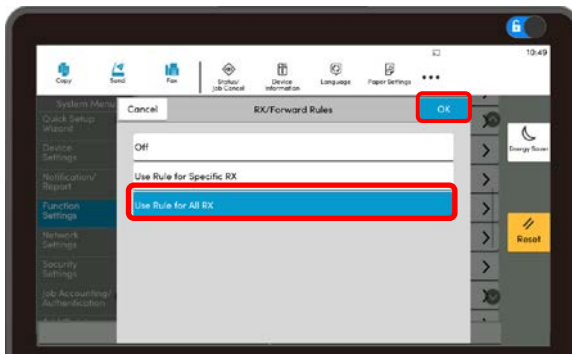
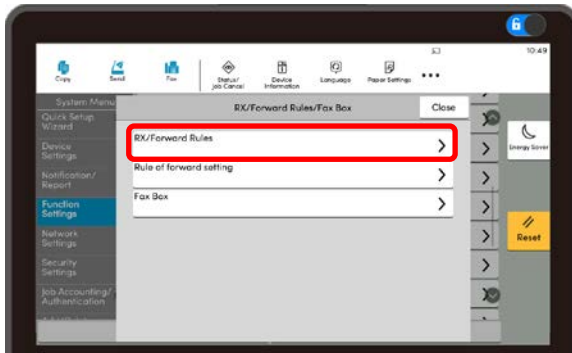
The procedure for storing received FAX documents to the **Cloud Information Manager FAX Box** is described below.

1. From the MFP operation panel, select **System Menu > Function Settings > RX/Forward Rules/Fax Box** to display

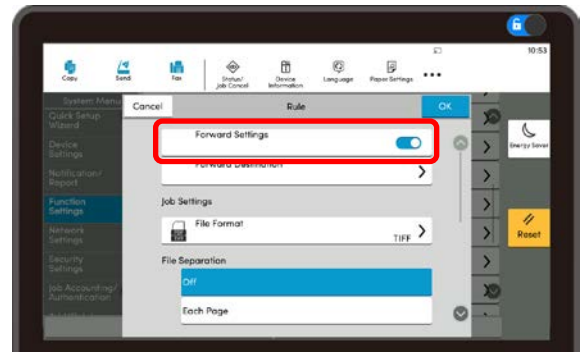
RX/Forward Requirements/Fax Box setting screen.



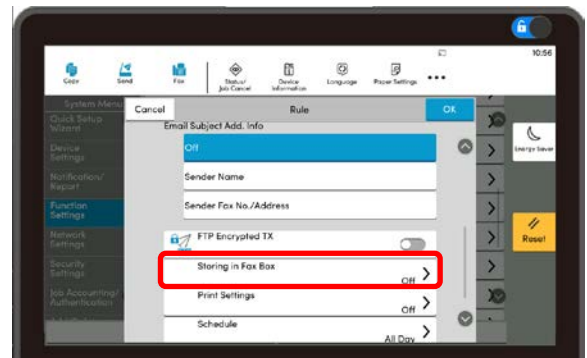
2. Select **RX/Forward Rules** to display **RX/Forward Rules** screen. This section assumes that all received FAX documents are stored in the FAX Box. Select **Use Rule for All RX**, and tap **OK**.



3. From the RX/Forward Rules/Fax Box setting screen, select **Rule of forward setting** to display **Rule Settings** screen. If the **Forward Settings** is not **ON**, set it to **ON**.

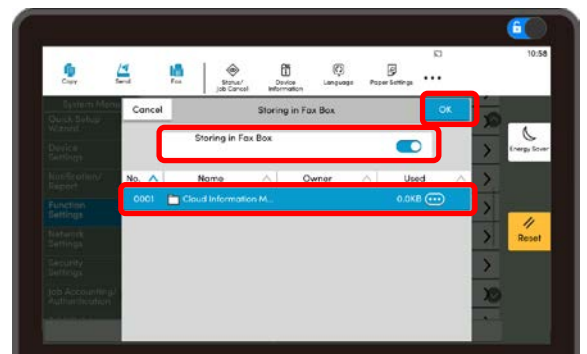


4. Scroll down on the **Forward Rules** settings screen and tap **Storing in FAX Box**.



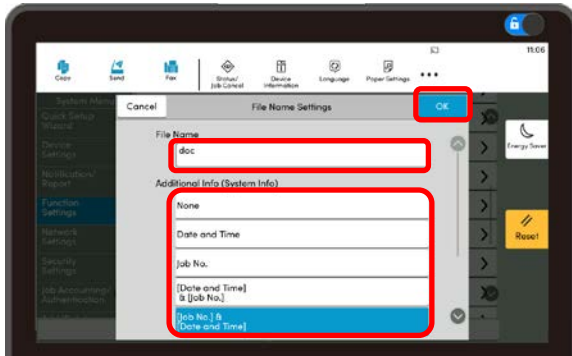
Storing in FAX Box settings screen appears. Tap **Storing in FAX Box** and set it **ON**. When you set it **ON**, MFP FAX Box list appears. Select **Cloud Information Manager** and tap **OK**.

※ Selecting the **Cloud Information Manager FAX Box** may require a password. (Password CIM#1478)



5. From the RX/Forward Rules/Fax Box setting screen, select **File Name Settings** to display **File Name Settings** screen. You can set the name of the document

that is stored in the FAX Box and that is uploaded to the server.



- **File Name**
Entered text is used for the document name.
- **Additional Information (System Information)**
Set the information to be added to the Document Name from **None/Date and Time /Job No./Date and Time & Job No./Job No.& Date and Time**
- **Additional Information (Sender Information)**

Set Sender FAX No./Address to be added to the Document Name. You can select from **None, Add No./Addr to Front, and Add No./Addr to Back.**

Example: If you set, Document Name "**doc**", Additional Information (System Information) "**Date and Time**", Additional Information (Senders Information) "**Add No./Addr to Front**", the document name of FAX stored will be "doc[Senders No./Address][Date and Time]".

After setting the document name, tap **OK** on the Document Name Settings screen.

6. Tap **OK** on the Forward Rules setting screen. This concludes the settings to store received FAX documents to the **Cloud Information Manager FAX Box.**

5. Appendix

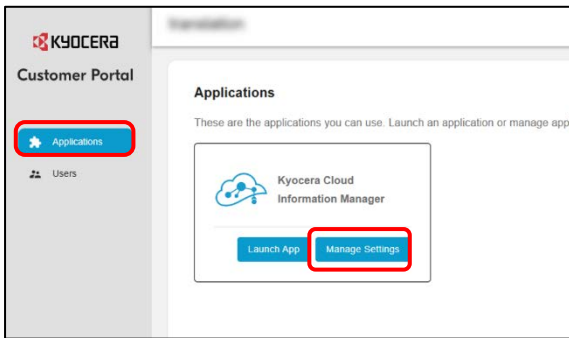
5.1 Set attributes and document classes

Several attributes and document classes are already registered with the Kyocera Cloud Information Manager (KCIM). If you need to modify or add attributes and document classes, make the following settings.

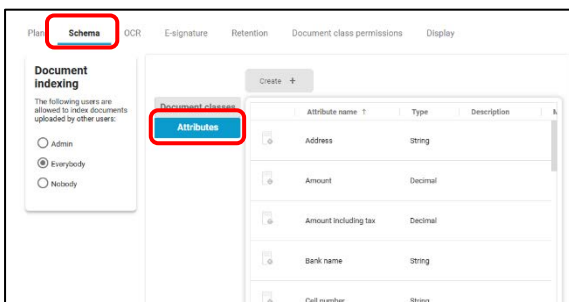
Attributes settings

This section explains how to set **Attributes**. An attribute is a record entry for a document. It is linked for each document class.

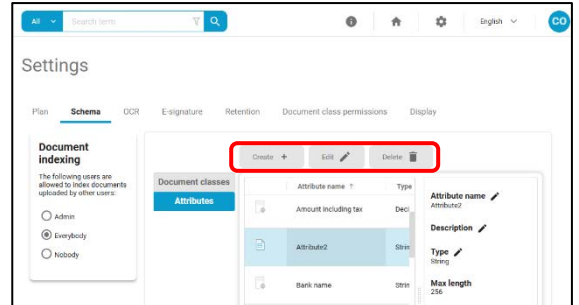
1. On the **Applications** screen, click **Manage Settings** of **Kyocera Cloud Information Manager**.



2. On the **Settings** screen of Kyocera Cloud Information Manager (KCIM), click **Schema** > **Attributes**.



3. A list of attributes appears. Select **Create** or any attributes to **Edit** or **Delete**.

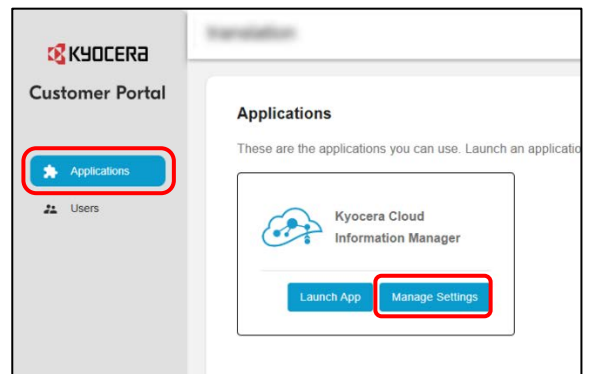


For more information, see **Chapter 10: Appendix** in the **Customer Admin Guide**.

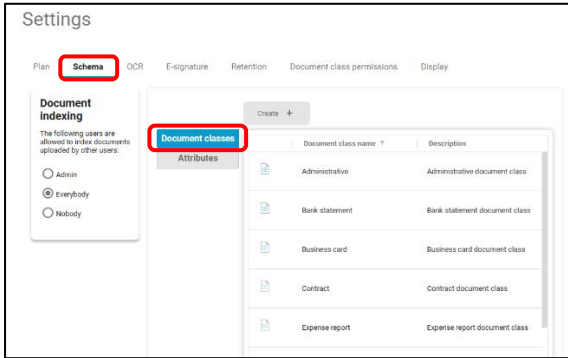
Document class settings

This section explains how to set **Document classes**. A document class is a record of a document type. The document class is pre-populated with the attributes that the document has.

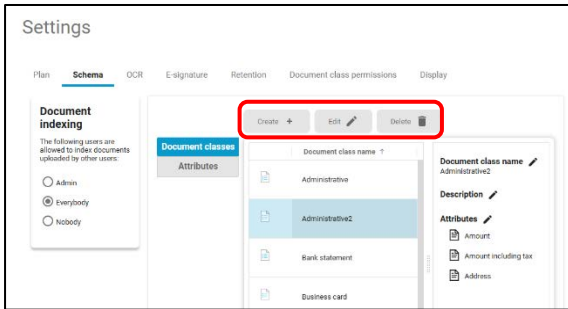
1. On the **Applications** screen, click **Manage Settings** of **Kyocera Cloud Information Manager**.



2. Kyocera Cloud Information Manager **Settings** screen opens. Click **Schema > Document classes**.

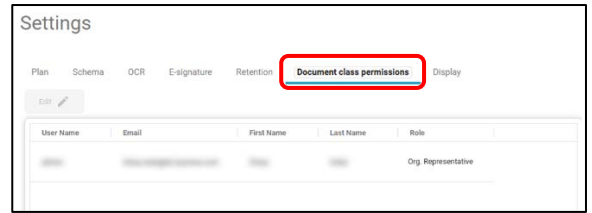


3. A list of document classes appears. Select **Create** or any document classes to **Edit** or **Delete**.

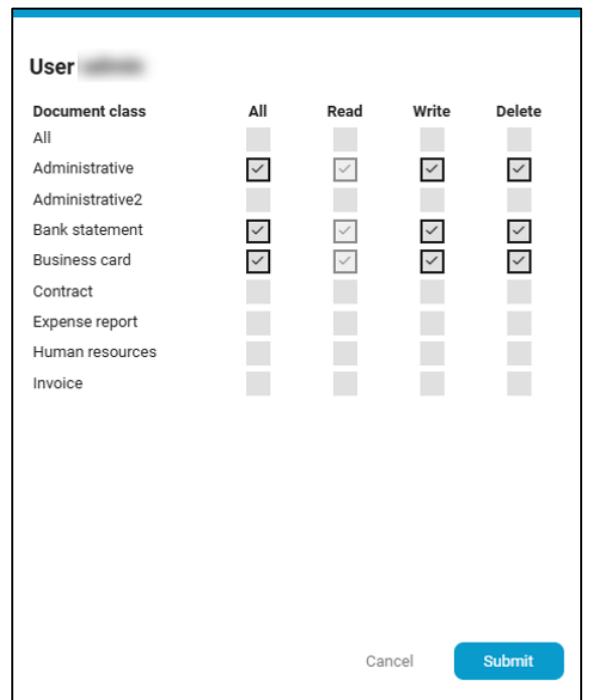
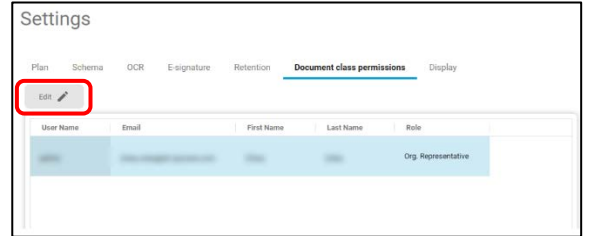


For more information, see **Chapter 10: Appendix** in the **Customer Admin Guide**.

4. Next, set the permissions for the document class. Click **Document class permissions**.



5. The list of user appears. Select any user to **Edit**.



For more information, see **Chapter 3: Getting started in the Customer Admin Guide**.

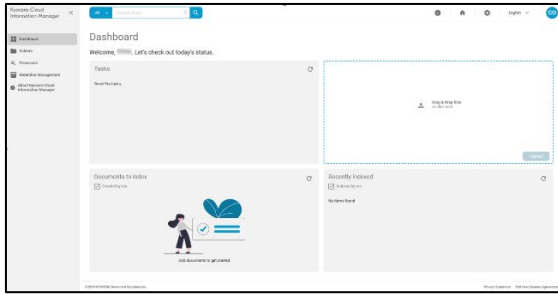
5.2 Make the screen easier to use

KCIM screen configuration varies depending on the magnification of your PC display or web browser.

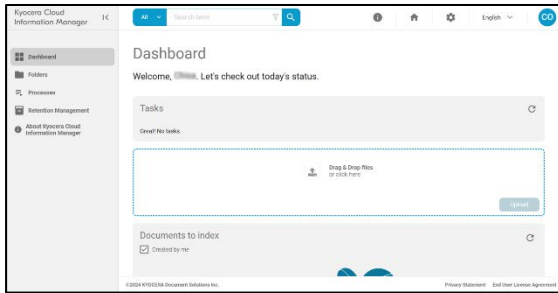
Therefore, the screen may not be user-friendly depending on the terminal settings. This chapter explains how to adjust the **Dashboard** screen to make it easier to use.

1. When you log in to KCIM, the **Dashboard** screen appears. The configuration of **Dashboard** screen varies depending on the window size.

➤ For large screen display

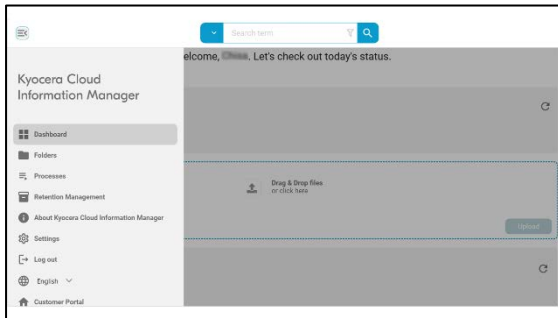
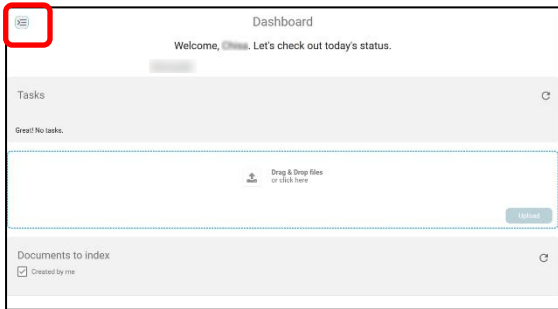


➤ For middle screen display

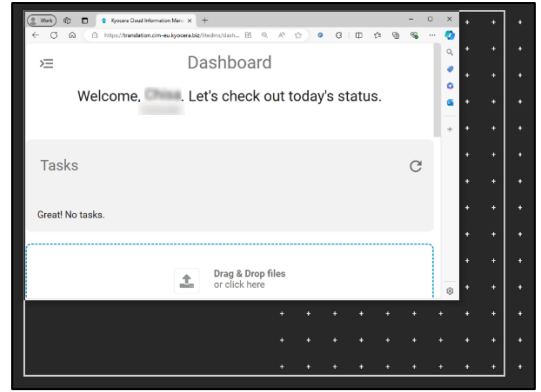


➤ For small screen display

Click ☰ in the upper left of the screen to display the Menu.

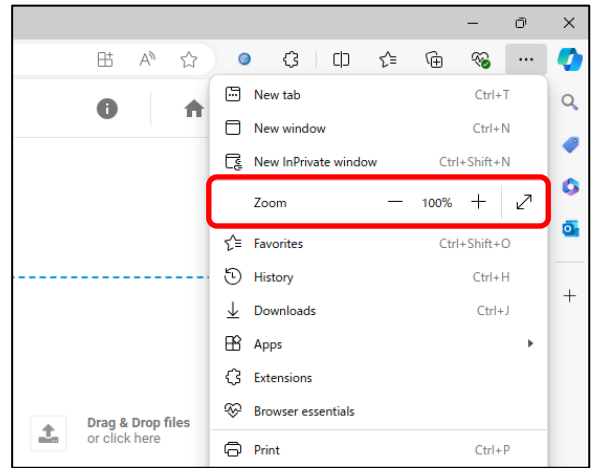


2. Drag your browser window to resize it to your preferred window size. The screen configuration varies with the window size.



3. If the previous step does not produce the desired screen configuration, change the browser magnification.

Example) For Microsoft Edge



4. If the previous step does not produce the desired screen configuration, change your PC display settings.

Example) For Windows

Change the text, app size, or display resolution.

