KOMI Doc
User guide (EN)

Version: 1.2

Giving Shape to Ideas

Table of contents

- **Description**
- **Release notes**
- **Documentation**

KOMI Doc is a software solution that can unite, through a single interface and a single infrastructure, all the company's information and documents.
Designed to store and index thousands of paper and electronic documents, KOMI Doc provides a quick and easy access to company's information via a simple Internet browser such as Internet Explorer or Google Chrome.

The KOMI Doc user guide includes recommendations, tips and suggestions to get the best out of KOMI Doc. Please make sure to familiarize yourself with the concepts and configuration procedures described in this guide and the KOMI Scan documentation, a document filing module.

For more information, or to access folders dealing with topics raised in this document, please also refer to the Konica Minolta website at the following address: http://www.konicaminolta.com

This manual has been written and published under the Konica Minolta control, it covers the latest product descriptions and specifications.

All terms, product references, recommendations, and the content can be changed without prior notice.

Konica Minolta reserves the right to change, without prior notice, the specifications and information contained in this manual and will not be held responsible for any damages (including consequential) caused by the information presented here, including, and without being limited, to typographical and other errors related to the manual.

Installer Guide

Hardware and software requirements

KOMI Doc is a Web application. It is therefore installed on a **server**.

To access the application, users log on via a Web browser from a **workstation** (or a mobile application).

Software requirements

1/KOMI Scan OCS in order to enable the following features:

- keyword search
- document preview
- document signature

Consult the KOMI Scan OCS documentation for more information about the setup.

2/ Java 8 & Java Cryptography Extension (JCE) 8

Minimal server configuration

A machine dedicated to operate KOMI Doc is required.

We only support 64-bit operating system.

- Intel® I5 Processor recommended (or above) 4 core minimum
- Microsoft® Windows® 2012 Server 64-bit (latest updates and service packs installed), Debian 8 64-bit.
- Microsoft Internet Explorer 10, Google Chrome, Mozilla Firefox and Safari in their latest versions (cookies enabled on the browser)
- Minimum 8GB of RAM.
- High speed disk : SSD or SAS.
- 50 GB of available disk space (variable depending on the amount of documentation to be archived). Setting up a RAID (Redundant Array of Independent Disks) is highly recommended.
- CD-ROM or DVD-ROM player
- TCP/IP network card
- Internet access
- MySQL services, Apache and MongoDB are required for KOMI Doc and therefore they should not be pre-installed on the server and used by another application

Please consult the KOMI Scan OCS must be installed on a dedicated server.

How to size the server resources

Depending on the solution use, it may be necessary to use a server with more resources than the minimum configuration.

The table below will help you choose a suitable configuration based on the number of pages that can be scanned. The "page" is used as a unit because it is much less subject to change than a document.

This information is based on averages established from PDF document scanned in an average quality (200dpi). They may therefore not be representative of the use of KOMI Doc that will be done.

Number of scanned pages per year	Disk space required for 10 years storage	Minimal RAM	Minimal CPU
< 10 000	100 GB	4 GB (2GB on Linux)	Core™ 2 Duo
< 25 000	250 GB	4 GB	Pentium or Xeon
< 50 000	500 GB	8 GB (4GB on Linux)	Pentium or Xeon

Number of scanned pages per year	Disk space required for 10 years storage	Minimal RAM	Minimal CPU
< 100 000	1 TB	8 GB	Xeon

For more than 100 000 pages per year, please contact us.

Example:

Average weight of a page: 400KB

10 000 pages of 400KB for 10 years: (10 000 * 400 * 10 * M) / 1024/1024 = 76.29 GB; 100GB rounded to take into account the space needed for the operating system.
"M" is a multiplying coefficient equal to 2, which allows to provide the necessary size for the storage of other data associated to the document (text content, metadata, thumbnails ...)

Server Ports and network configuration

Below the list of ports that need to be opened on your **local network**. **In order to open your installation over Internet please consult this article.**

From a **remote machine** (LAN)

- Windows : 8000 (http) and/or 8443 (https)
- Debian : 80 (http) and/or 443 (https)
- Every other ports can be closed

The following ports must be available **internally** on the machine (localhost):

- ERlang et RabbitMQ : 4369, 5671, 5672
- Mysql : 3306
- KOMI Scan OCS if installed on the same server (not recommended): 8080

Workstations configuration

- Microsoft Internet Explorer 10 or higher, Google Chrome, Mozilla Firefox and Safari in their latest versions (cookies enabled on the browser)
- Acrobat Reader : http://get.adobe.com/reader/
- Microsoft Silverlight if Internet Explorer is used
- Recommended minimum screen resolution of 1024 x 768, 1200 × 900 or higher

Windows installation

Insert the CD- ROM into the computer CD drive. After a few seconds, the installation menu appears automatically.

Click on the « **Install KOMI Doc** » button and follow the instructions.

The program suggests installing the necessary files on the hard drive.

Click **"Next"** , wait until the installation is completed.

The KOMI Doc installation program will also proceed with the MySQL database installation and several essential components such as PHP and Apache.

In case the installer is run from Windows Explorer, the "Administrator" rights are required.

Detection and ports configuration under Windows:

Detection of the availability of the ports 8443 , 8000 (Apache) and 3306 (MySQL) during installation, and possibility to change these ports if they are already used by other services.

Since the version 6.3, KOMI Doc includes ERLANG, which can cause the alert below.

Not opening the firewall will have no impact on the product functionalities.

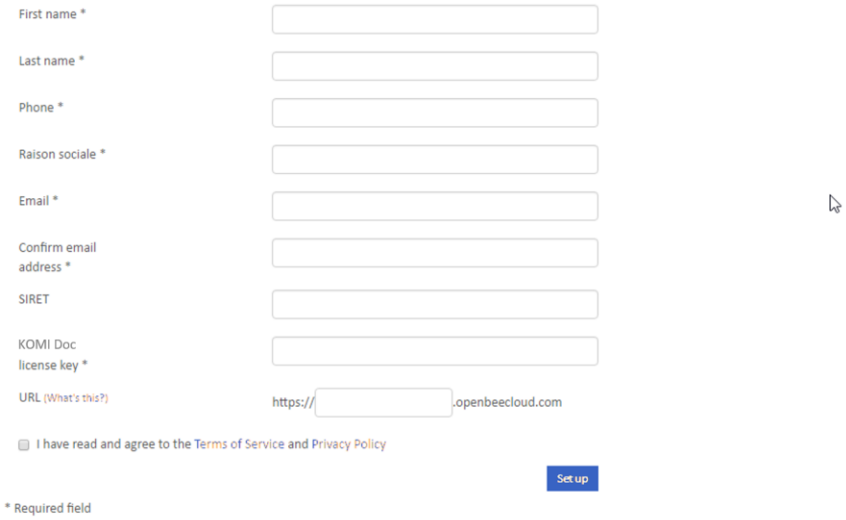
Once the installation is completed, a page automatically appears in your Web browser so you can proceed with the activation of your software.

Do not forget to install component in order to complete your installation of KOMI Doc.

Cloud installation

In order to create your KOMI Doc document space, click on the following link: https://www.komidoc.com/new

A page appears in your web browser, please fill in the form.



Once your license key is filled in, you must choose your domain name to determine the Internet address of your KOMI Doc document space.

This field allows you to create your own URL for your document space. The URL prefix can have a maximum of 63 characters and consists of a - z | 0-9 | characters and dashes.

To do so, type in the appropriate box, the word of your choice, eg your company name: https://mycompany.komidoc.com

Once you have completed all required fields, click the "Set up" button.

A message will inform you about the status of the operation and an email containing your administrator login credentials will be sent to you.

Keep this email carefully.

You can now see the Administrator Guide section.

Backup

- Setup a backup
- Restore a backup

Setup a backup

An KOMI Doc backup can simply be configured by saving some files using the appropriate software.

The paths indicated below are:

- either absolute,
- or related to the KOMI Doc installation directory (C:\Program Files (x86)\OpenBee\komidoc5 by default for windows and /var/www/ for Debian)

Simple list of folders to backup

A backup of the following folders allows to save all the data:

- komidoc/data/
- komidoc/config/
- komidoc/web/
- mysql\data\ on Windows and /var/lib/mysql/komidoc/ on Debian

Detailed list of folders to backup

To refine the backup strategy, here is a more detailed list:

Database

- MySQL data folder : **mysql\data** on Windows and **/var/lib/mysql/komidoc/** on Debian
- Daily database DUMP that are done every night: **komidoc/data/dump/**

Documents

These folders contain documents and thumbnails:

- Documents : **komidoc/data/Documents/**
- PDF documents preview: **komidoc/data/pdfConversion/**
- Images thumbnails: **komidoc/data/images/**

Configuration

The database as shown below:

- Configuration files : **komidoc/config/**
- Imported stamps : **komidoc/data/stamps/**

Customization

- Background image and other logos: **komidoc/web/images/**
- Color customization: **komidoc/web/dist/css/**

Restore a backup

This procedure can be applied to restore a backup or to move KOMI Doc on a new server.

- Installing the new server
- Database restoration
- Restore thumbnails documents and files
- Restore the configuration
- License activation and validation of configurations

Installing the new server

Install KOMI Doc on the new server, in the same version as the version to restore.

Database restoration

Delete and recreate the database:

```
mysql -u root -p 'DROP DATABASE obportal'
mysql -u root -p 'CREATE DATABASE obportal'
```

Import the database copy from your backup. The database file is in the folder "data / dump /" of your backups.

```
mysql -uroot -p obportal < backup.sql
```

Restore thumbnails documents and files

Copy the backup folder "komidoc/data/" towards " komidoc/data/" of the new installation.

Restore the configuration

Copy the following backup files to the new installation:

- "komidoc/config/"
- "komidoc/web/"

License activation and validation of configurations

At this stage you should be able to log on to KOMI Doc with your user account.

If your license is not reactivated, contact our support.

Then check the configuration of the connection to your SMTP server, to KOMI Scan OCS and to your LDAP server if you use one.

Update

This page describes the update procedure about KOMI Doc version 6.0

Compatibility with other Konica Minolta products

From version 6.0, SOAP Web Services are not supported by KOMI Doc.

An update and a reconfiguration of other Konica Minolta products may therefore be necessary to communicate with this version of KOMI Doc.

Products	Version
KOMI Scan	5.6 and above. Only REST
KOMI Doc Office Manager	5.7 and above. Only REST (implies having Office 2007 and above)
KOMI ERP Manager	2.5 and above.

Qualified person to perform the migration

Initial version:

Platform	Versions 3 and 4	Versions 5.0.0.1 to 5.0.0.49	Versions 5.0.0.50 and superior
Windows	Konica Minolta technician	Konica Minolta technician	Reseller technician
Linux	Konica Minolta technician. Migration towards a 5.3.5 version then from the 5.3.5 to the 5.4	Konica Minolta technician	Konica Minolta technician

Current version : 6.0

Compatible versions

All of the versions 5, below 5.4 of KOMI Doc can be directly updated to the lastest 6.0 version.

Versions 3 and 4 require manual migration performed by an Konica Minolta technician.

Contact the Konica Minolta reseller.

Licenses

- To migrate from a version 3 or 4 to version 5, a new license is required. Contact the Konica Minolta reseller.
- To migrate from a version 5 below 5.3.5, to version 5.3.5, the license is still valid.
- Version 5 comes with various features that are not necessarily included in the license:
    - Linear workflow
    - Conditional workflow
    - KOMI Doc Mobile (mobile application for smartphones and tablets)

Contact the reseller to subscribe to these additional features.

Update procedure

Before updating the solution, it is imperative to make a backup of the current installation.

Konica Minolta declines responsibility for data loss during an update that would have been done without backup.

Current installation backup

Check out the KOMI Doc backup page

Update

Windows

- Double-click on the provided installer for Windows and follow the instructions.
- Once the wizard is over, KOMI Doc is updated. Log in KOMI Doc using a web browser to check that the application has been updated.

Installing and updating an add-on

From version 6.6, KOMI Doc has a system of Add-ons to enhance the basic functionality of the application. This section describes the installation and management of an add-on.

Two installation modes are available :

- from the KOMI Doc admin web interface
- in command lines from the KOMI Doc server

From web interface

Connect as an admin, and go to "Administration > Add-ons".

Add-on installation

Click on the "Add an add-on" button.

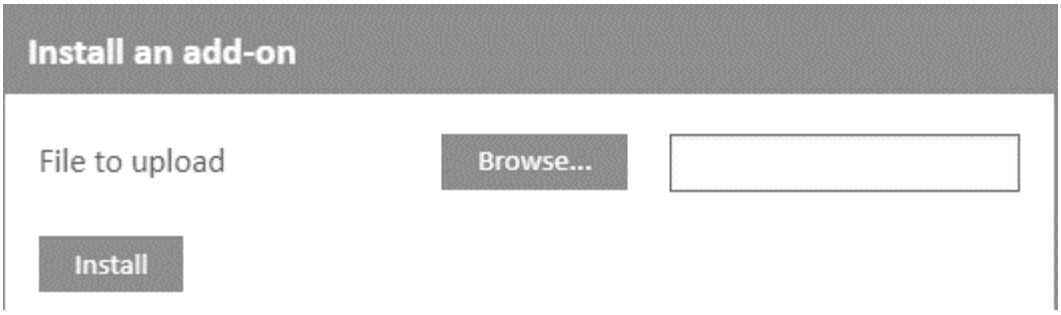
Two options are available :

1/The add-on is available online and displays in the available add-ons.

Then simply click on Install.

2/ The add-on is not available online and does not display in the available add-ons, but you have the add-on ZIP archive.

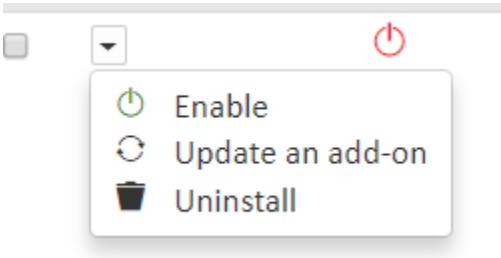
Then click on the "Install an add-on" link and select the add-on ZIP archive from your workstation.



Once the add-on is installed, it displays on the list of available add-ons. It is necessary to activate it for it to be used by an user.

Activate / Deactivate an add-on

From the add-ons list, you can activate / deactivate add-on from the context menu linked to each add-on, or in bulk from the bulk action menu.



The add-on deactivation enables to hide it from user while keeping associated configurations.

Add-on update

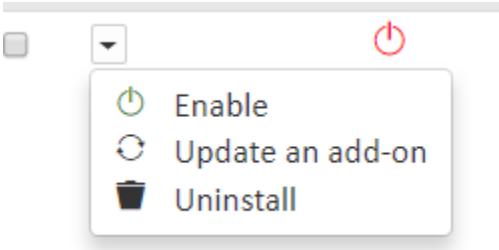
Once an add-on new version is available on line, a notification indicates that an update is available displays in the "version" column.

It is then possible to update the add-on by clicking on the icon.

The update can also be done by the unit action menu or in bulk from the add-ons list.

Uninstall an add-on

From the add-on list, you can uninstall add-ons from the context menu associated to each add-on, or from the bulk action menu.



⚠ The add-on uninstallation will most of the time trigger deletion of configuration and data linked to the add-on. This behaviour can vary from an add-on to another.

From command lines

```
php app\console addon:install <addonZipPath>
```

Replace <addonZipPath> by the absolute path of the add-on

Parameters specific to an add-on can be specified during the installation. These parameters are specified in the documentation for each add-on.

```
 php app\console addon:install <addonZipPath> --param1=value1 --
param2=value2
```

Activation / Deactivation of an Add-on

Once the add-on is installed, it is not yet available to users. In order to make it accessible, it is necessary to activate it:

```
php app\console addon:enable Openbee/<addonName>
```

<addonName> is the name of the add-on. It is usually the same name used in the zip archive. For an archive with the name "Chorus-6.6.0-ebea6ba.zip", <addonName> will be "Chorus".

The inverse operation allows to disable the add-on of an installation, without removing the data:

```
php app\console addon:disable Openbee/<addonName>
```

Updating an Add-on

To update an add-on, use the following command :

```
php app\console addon:update <addonZipPath>
```

<addonZipPath> is the path to the ZIP archive containing the new version to install.

Uninstalling an Add-on

Before uninstalling an add-on, it is necessary to disable/deactivate it.

Uninstalling an add-on removes all user data associated with the add-on.

```
php app\console addon:remove Openbee/<addonName>
```

License activation

To activate your KOMI Doc solution, two activation modes are available :

- Online activation (if you have an Internet connection)
- Offline activation (if you do not have an Internet connection)

Online activation mode:

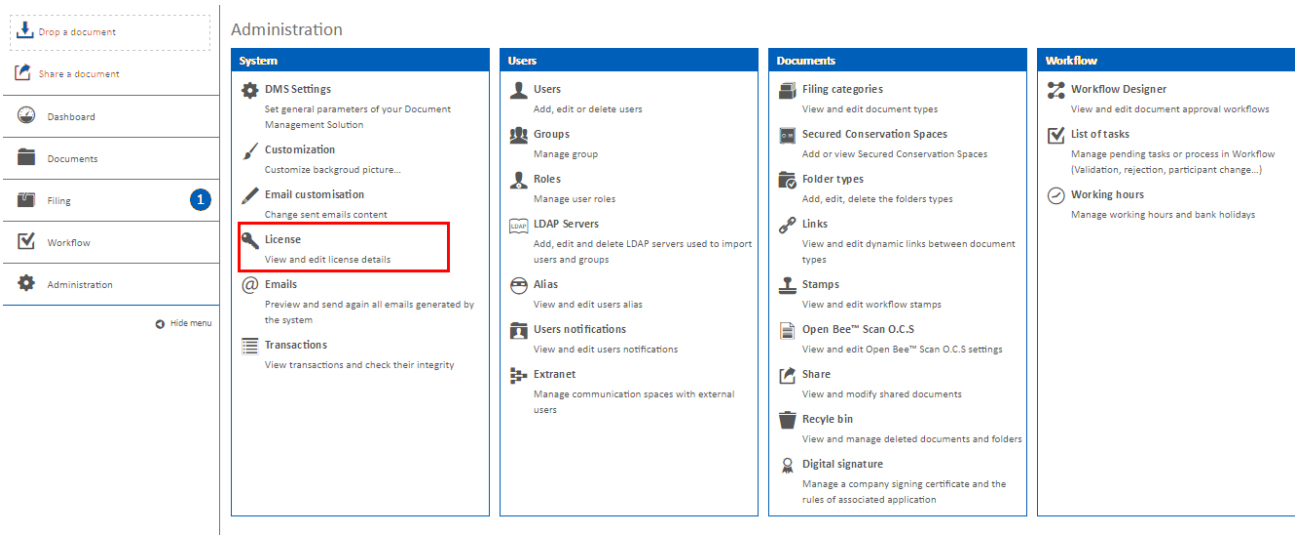
When launching the application the first time, this form appears in your Internet browser. To activate a license online, you need an Internet connection.

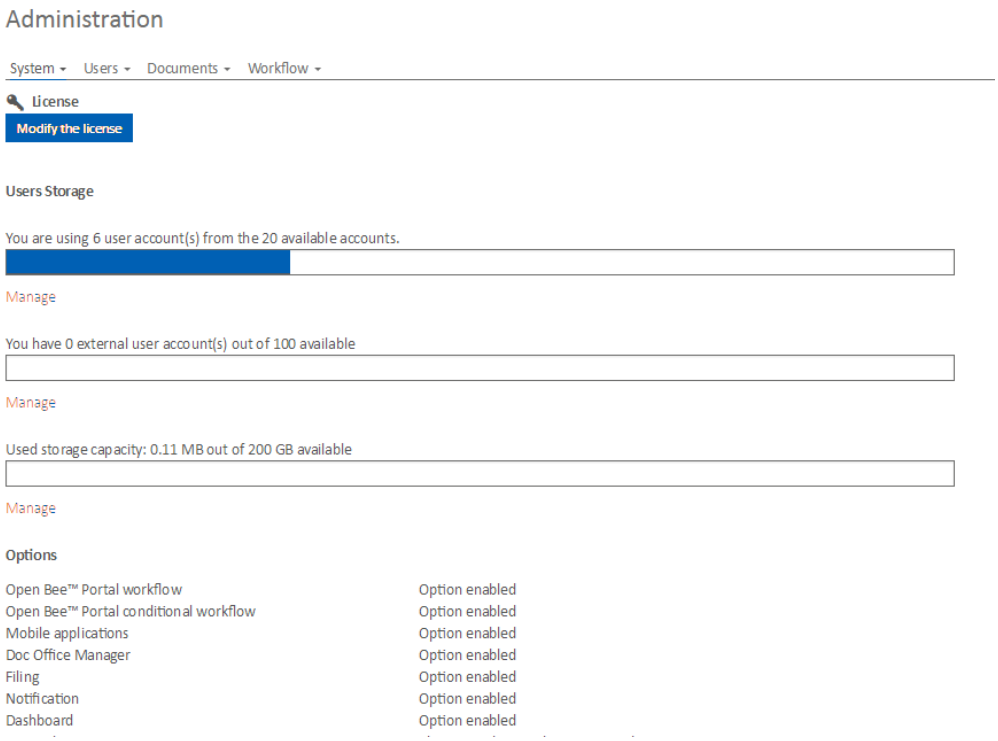
Complete all fields in the form and enter the license key that came with your software solution.

Once this step done, click **"Activate".** A message will confirm the correct activation of your solution.

KOMI Doc is now functional.

To view or edit an already active license in the **"Administration"** panel, click on **"License"** and then click the **"Modify the license"** button:





Offline activation mode:

Manual activation provides the possibility to activate KOMI Doc even if you do not have an Internet connection:

1. Fill in all the fields of the form
2. Click **"Activate"**

3. A PDF document is automatically generated. Please send it by email to the address listed on the document
4. A license file will then be returned to you by email
5. Once this file received, please insert it by checking the box **"Use a license file"** in order to activate the KOMI Doc solution
6. A message will appear confirming the correct activation of the solution

Important safety note

HTTPS

The data transferred between a workstation (scan station, mobile application or Web browser) and KOMI Doc via the HTTP protocol flows in clear on the network, unless you use the secure protocol version (HTTPS).

By default, the Apache server included during the KOMI Doc installation is available in both HTTP (port 80 or 8000) and HTTPS (port 443 or 8443).

We strongly recommend that you disable the availability of HTTP and only use HTTPS, for example by installing an upstream reverse proxy for KOMI Doc.

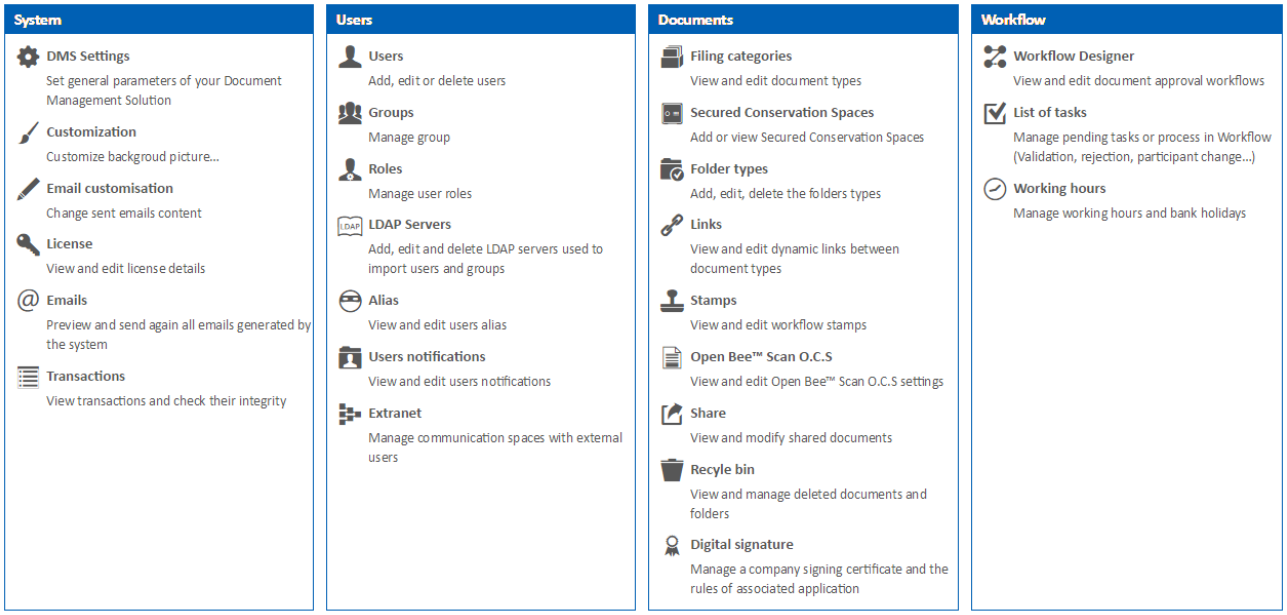
Access to KOMI Doc from Internet

Opening your KOMI Doc access on Internet requires a very special attention in terms of security.

Administrator Guide

The Administration interface allows you to create users and groups of users, to manage deleted documents and customize the general configuration of KOMI Doc.

To access the Administration module, click on the "**Administration**" icon.



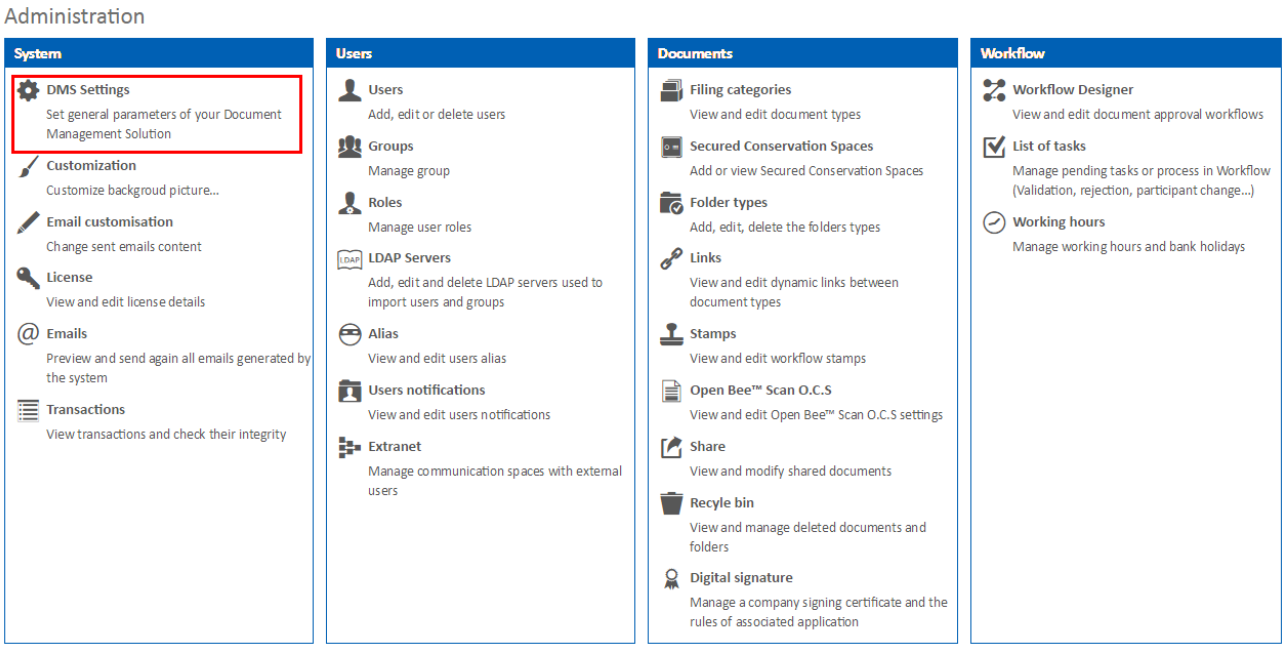
General configuration

This interface allows you to customize the application configuration.

It is divided into several sub-sections :

- Documents
- Search engine
- Email
- Authentication (SSO)

To access it, click on "**Administration**" \ "**DMS Settings**".



DMS Settings

General

Base URL	http://192.168.1.13:8000
Time zone	America/New_York
Notification display time (ms)	3500

Documents

Browser display	Folder
Nb of items to display per page	25
Nb of thumbnails to display per page	64
Action when document clicked	Preview

☐ Encryption of the documents

☐ Search within encrypted documents

Max number of versions (current included) ☑ Illimité

Search engine:

☑ Search documents only for whole word match

Email

SMTP server	127.0.0.1
Security	None
SMTP port	25
	☐ Use SMTP authentication
SMTP username	
SMTP password	
Sender	admin@bijou.fr
Email format	text/html

Authentication

☐ Activate automatic authentication from a Windows account (SSO). This option requires that the users have been created from a LDAP Active Directory in order to work.

Save configuration

To validate each action / modification made in this section, click on the : "**Save configuration**" button.

General

- **Base URL :** KOMI Doc address.
- **Time zone :** Allows to show local time and date in KOMI Doc history.
- **Notification duration :** Duration in milliseconds for displaying system messages, after performing each action. (Example: "Group successfully registered")

Documents

- **Visualizer :** Default display mode of KOMI Doc folders / documents. Different choices: Folder, Icons or Thumbnails.
- **Line per page :** Number of items displayed per page in the folders / documents browser. Only valid with list and thumbnail views.
- **Icon per page :** Number of items displayed per page in the folders / documents browser. Only valid with the icon view.
- **Behavior when clicking on a document :** "**Preview**" allows the redirection on the document preview screen in KOMI Doc. "**Download**" launches the document download on the user's workstation.
- **Maximum file size :** Value in MB of the maximum size allowed for the upload of ZIP folders / documents. The maximum default size is 100 MB. Bigger datas' import is possible with KOMI Sync .
- **Documents encryption :** Check this box to allow AES 256-bit encryption on documents stored in KOMI Doc. This option is transparent for the end user. It is not retroactive, only documents and versions added after activating the option will be encrypted. To encrypt existing documents please contact the support.
- **Encrypted documents search** : Check this box to be able to search on encrypted documents content. This feature involves less security because of the unencrypted storage of documents content in the KOMI Doc database.

Search engine

This feature lets you quickly find documents, by configuring the search engine to scan only whole words corresponding occurrences.

This feature should be disabled if you want to search documents by one or more characters (highly recommended for documents written in Asian languages). If disabled, the search time will be slower.

Email

- **SMTP server :** The address of the SMTP server is used to send the different email notifications (eg : email notification when creating a new user)
- **Security :** Use of a secure protocol such as TLS or SSL, or none
- **SMTP port :** SMTP server port (default port: 25)
- **Required SMTP authentication** : Check this box if the SMTP server requires authentication.

- **SMTP user name** : Mandatory field when using an SMTP server authentication.
- **SMTP password** : Mandatory field when using an SMTP server authentication.
- **Sender :** The email address which will appear when sending the various notifications.
- **Email format :** Text / Html by default (we recommend not to change this value, so that the email notifications will not be considered as a SPAM)

The "**Check settings**" button allows to test if SMTP settings are valid or not.

Authentication (SSO)

Automatic authentication from a Windows account (SSO) can be done by checking this box.

A number of other prerequisites and configuration are essential to use this function properly.

See this page for more details.

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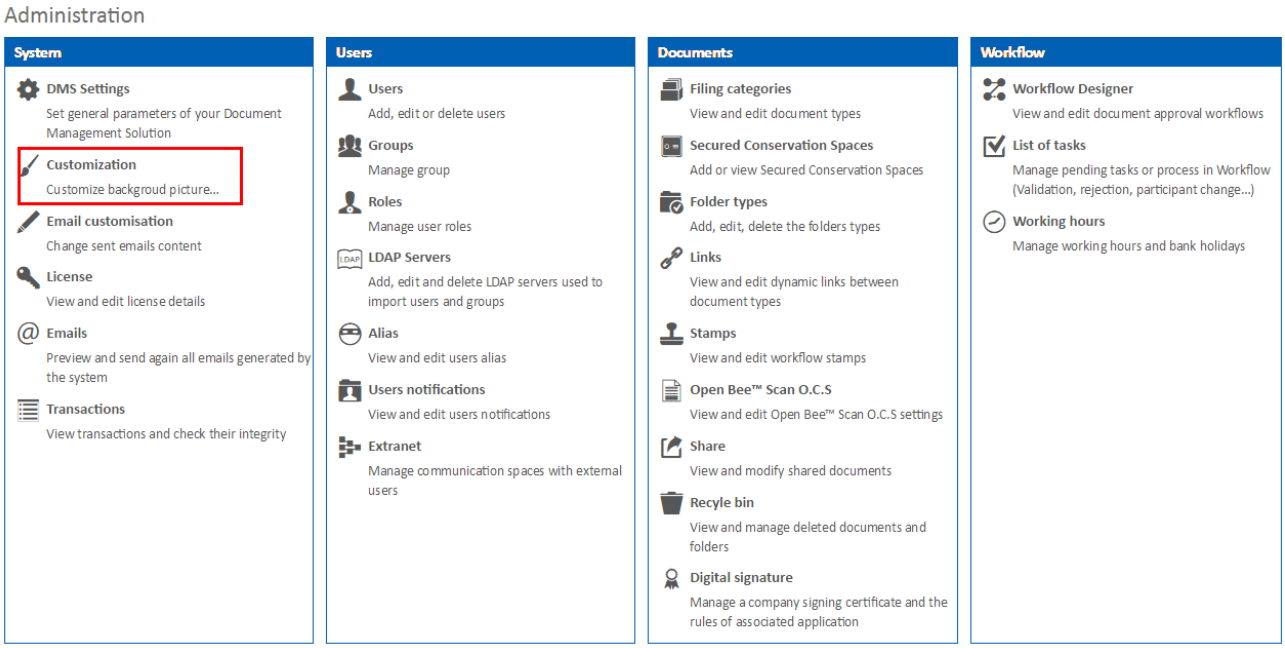
Customization

This interface allows to customize visual and textual elements of the user interface.

To access it, click on "**Administration**" \ "**Customization**".



To validate each action / modification made in this section, click on the : "**Save configuration**" button at the bottom of the page.

1/ Name of the "My documents" folder : "**My documents**" folder contains the personal records of all users. Each user has therefore a space in which he can store his personal documents. This field allows to change the wording "**My documents**" for all users.

2/ Color : allows to change the default color (orange) of all buttons and links of the application.

3/ Product name : allows to customize the term "KOMI Doc" in every locations (emails, footers, headers...)

4/ Logo : allows to customize the application logo on the login screen, header and emails.

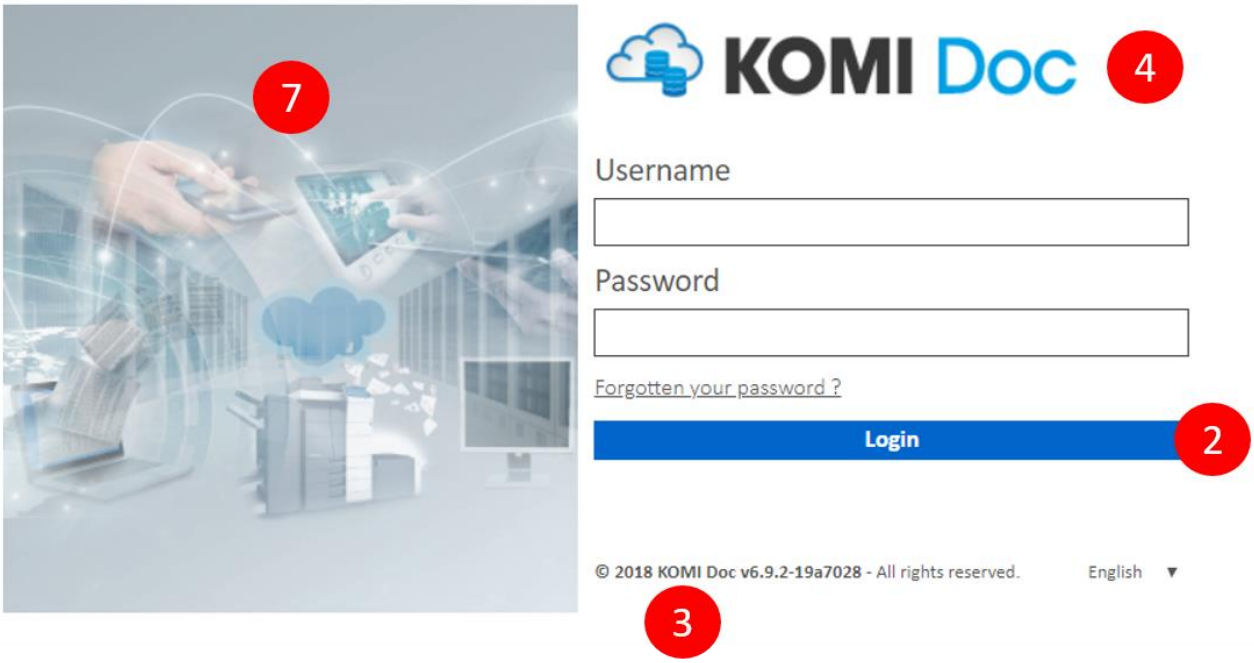
5/ Favicon : allows to customize the icon of the browser bar.

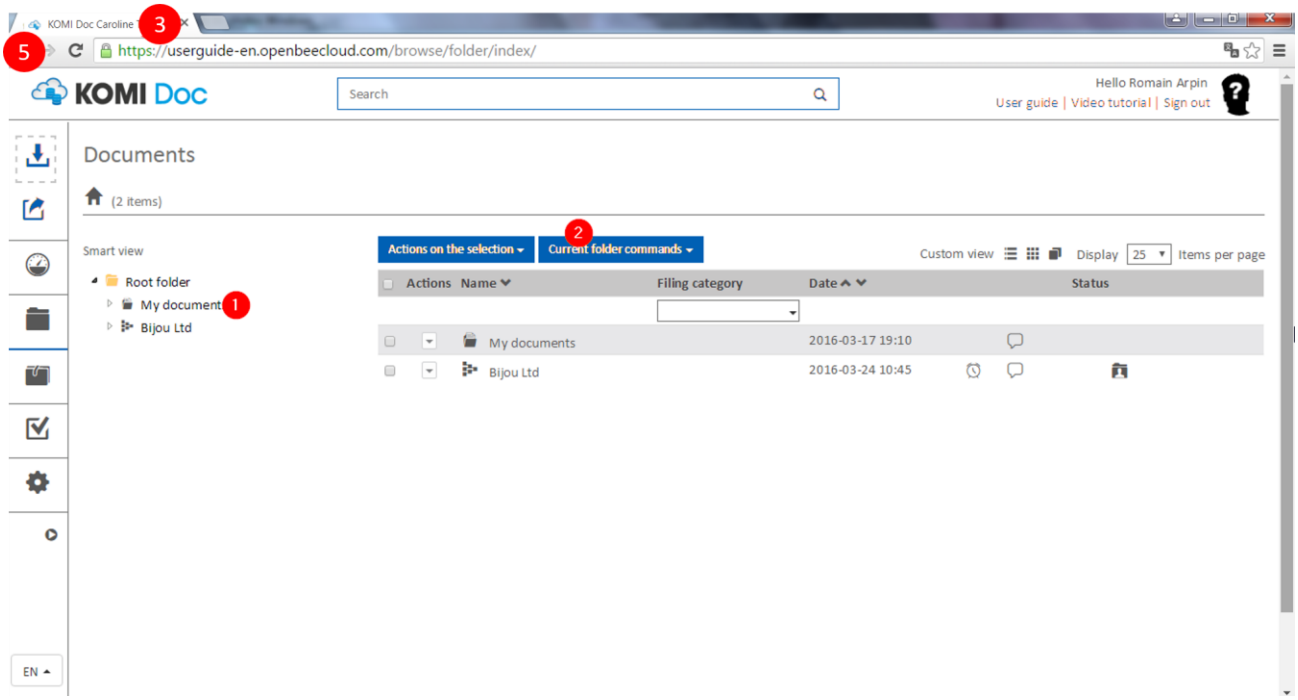
6/ Company logo : allows to customize the company logo. It is used in replacement of the application logo on small screens (mobile)

7/ Login screen image : allows to customize the image displayed on the login screen.

8/ Banner : Ability to set an advertising banner that will be displayed for external users.

Here are two examples of elements of the interface which can be changed by these different settings:



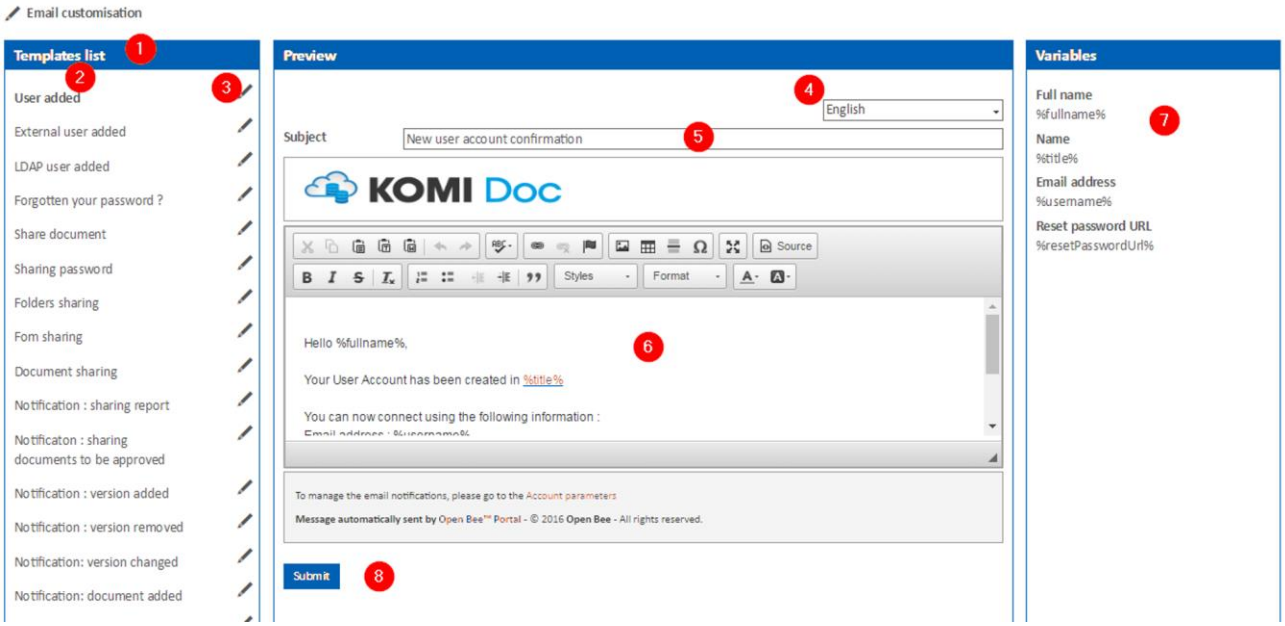


Email customisation

This interface allows to modify sent emails content.

To access it, click on "**Administration**" \ "**Email customisation**".

The following screen appears :



<u>To modify a template :</u>

1/ The left column shows a list of email templates used by KOMI Doc.

2/ Click on the template's name to view it

3/ Click on the pencil next to a template to edit it

4/ Select the language of the template you want to change

5/ Modify the subject

6/ Modify the email content

7/ In the right column, you will find a list of variables related to the email. These variables can be used in the email content and will be replaced dynamically by KOMI Doc when sending the email.

Example : "%fullmane%" will be replaced by "Pierre" when sending the email to a user whose name is "Pierre".

8/ Click "**Submit**" to save your modifications.

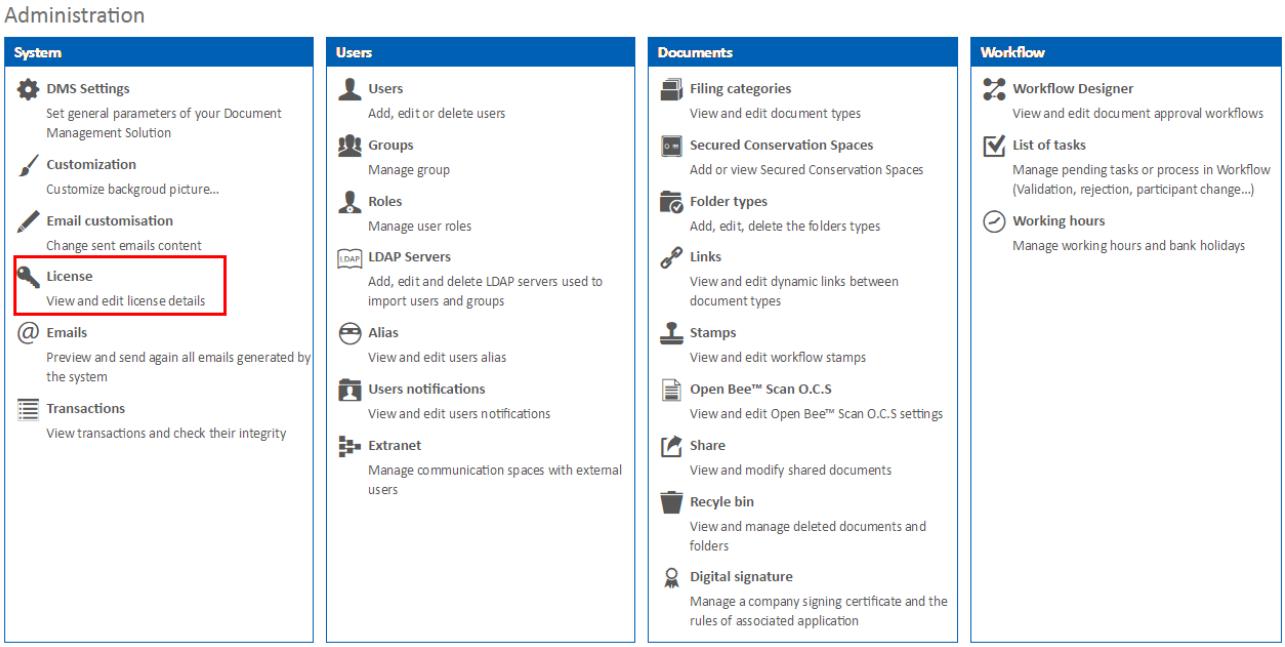
Then renew the operation with other templates or in other languages.

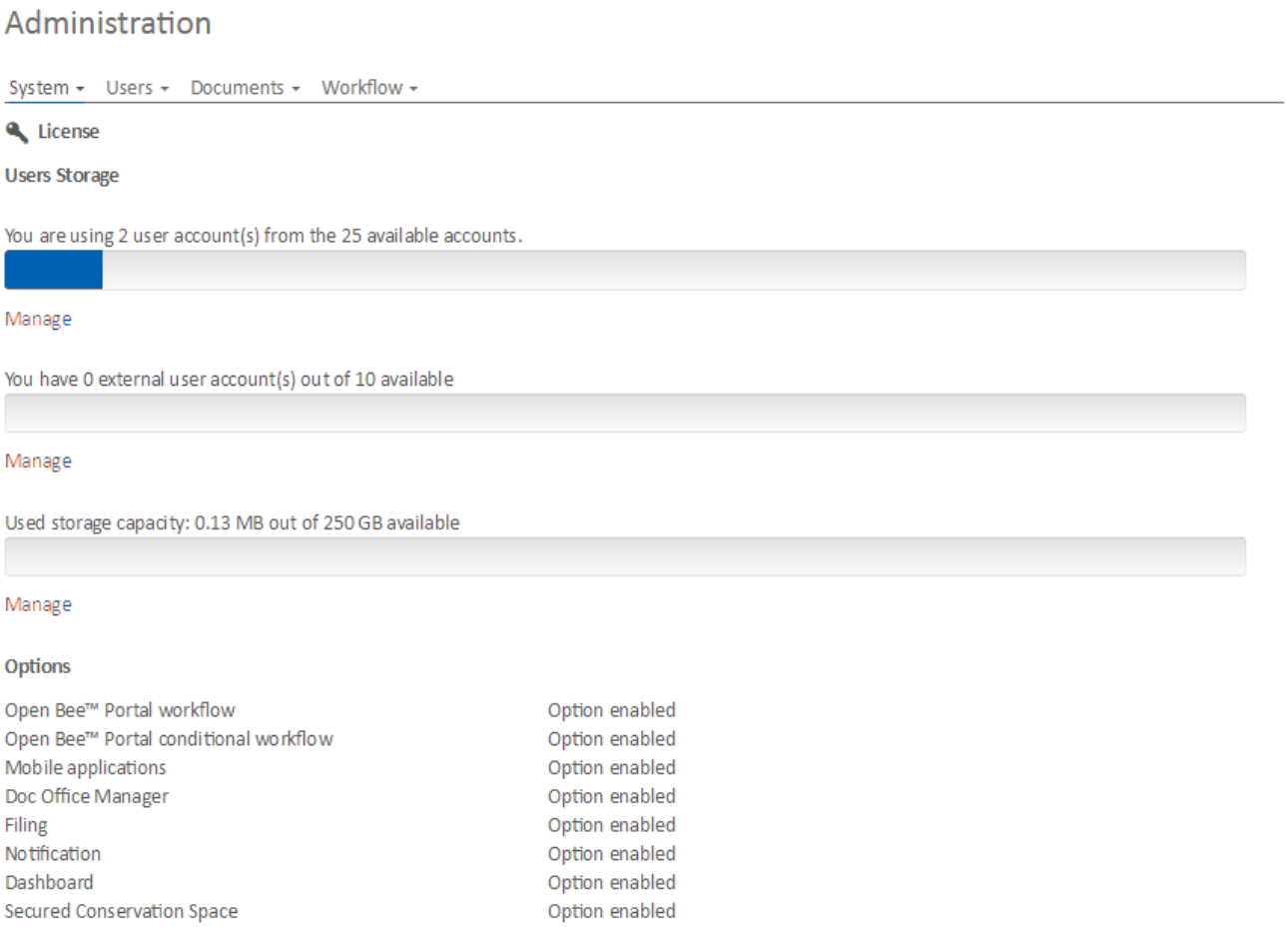
License

This screen allows to consult the license.

- Modify the license
- Users & storage
- Options

Click on **"Administration"** \ **"License"**





Modify the license

To update the license, click on the button "**Modify the license**".

The activation page described in the "License activation" part is displayed.

Users & storage

- Number of users available in the license and number of users already active.
- Number of external users available in the license and number of external users already active.
- Storage capacity available with the license and capacity already used.

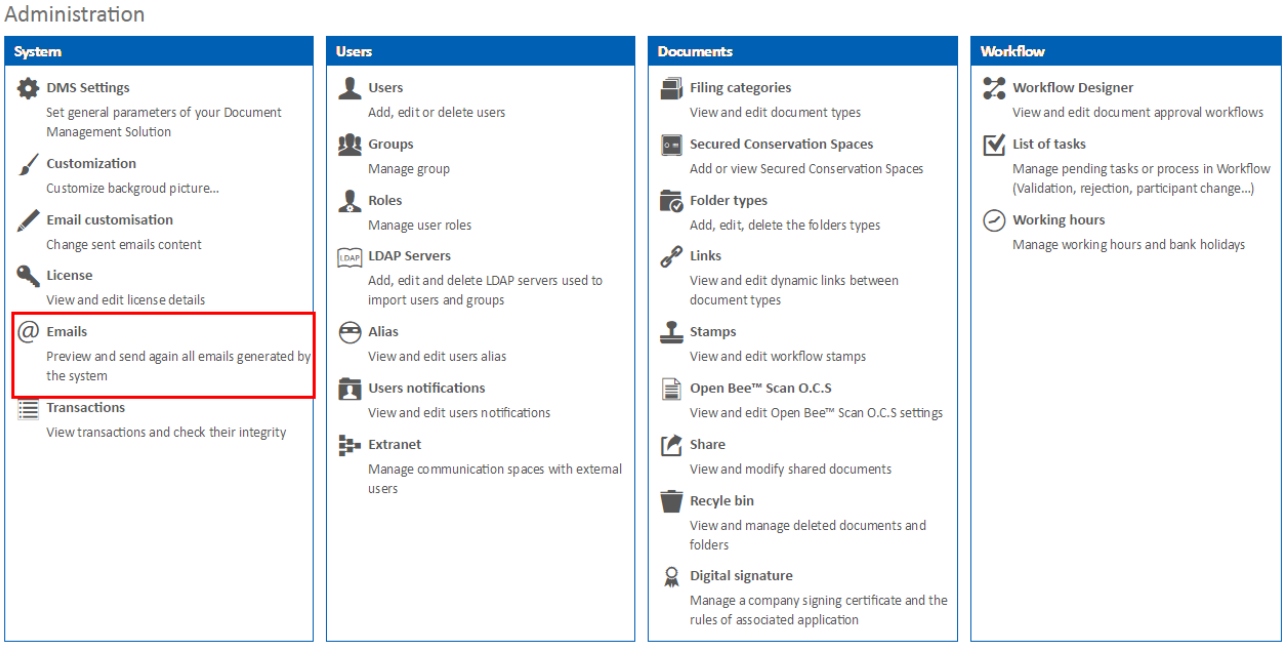
Options

Depending on your license, some options might be available for you to enable.

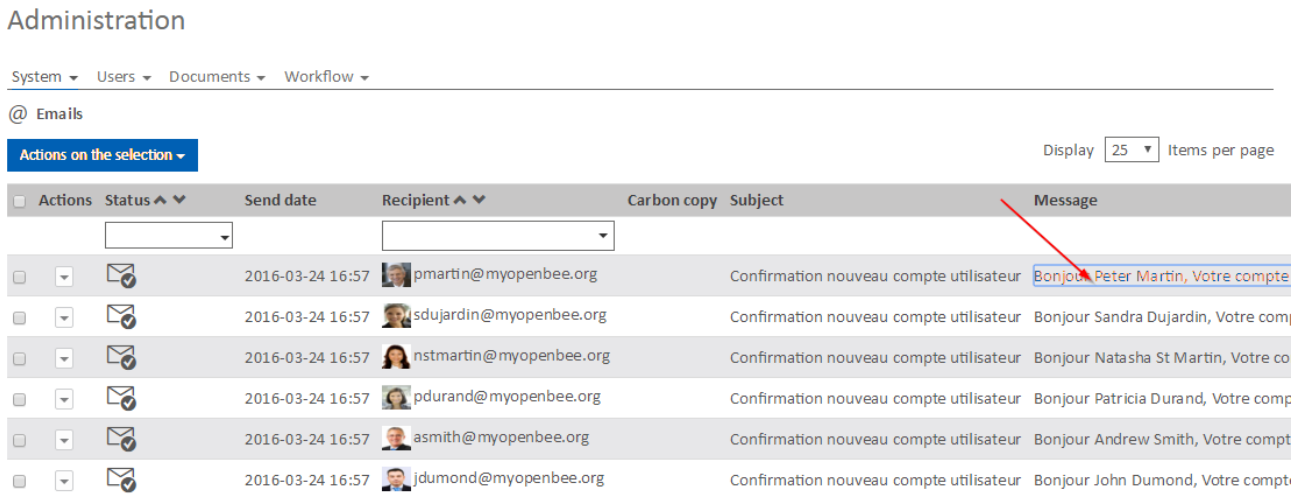
Sent emails

This function allows to view and send again all emails sent by the application.

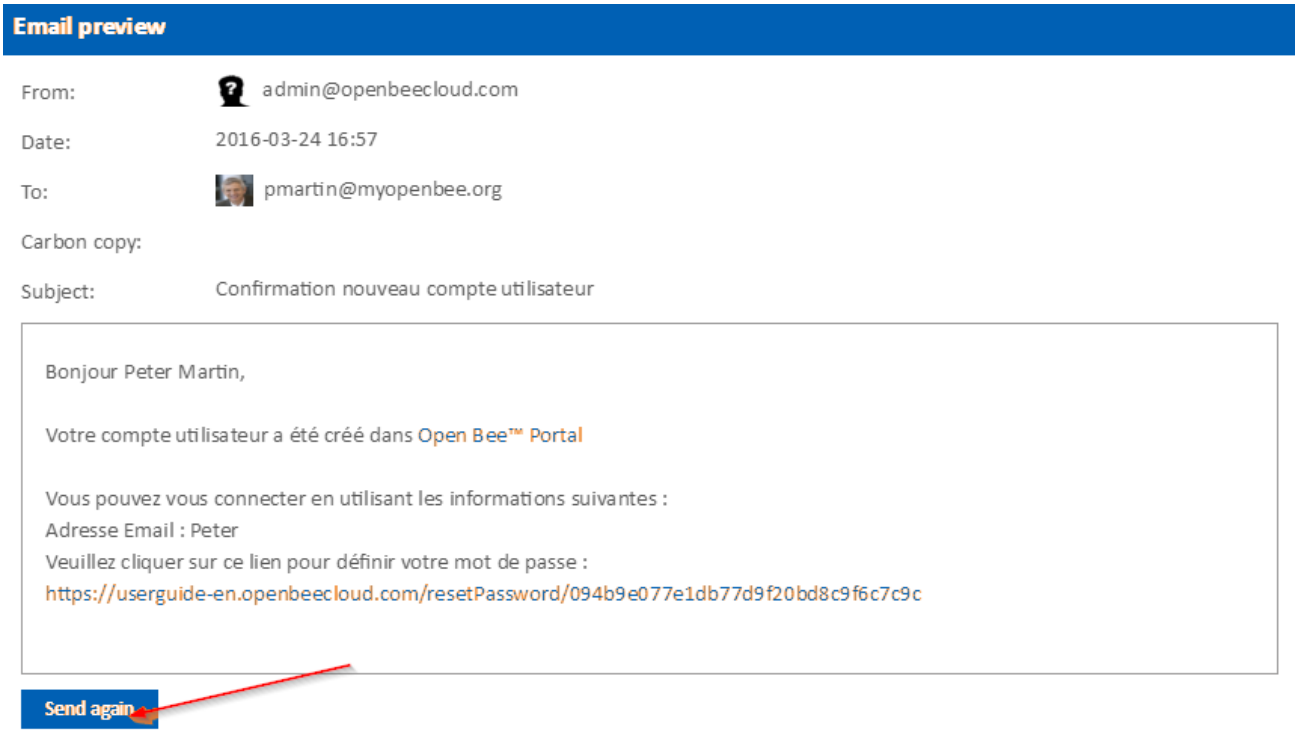
Click on **"Administration"** \ **"Emails"**



The list of messages appears. It is possible to filter on the status (successfully sent or not) as well as on the recipient.

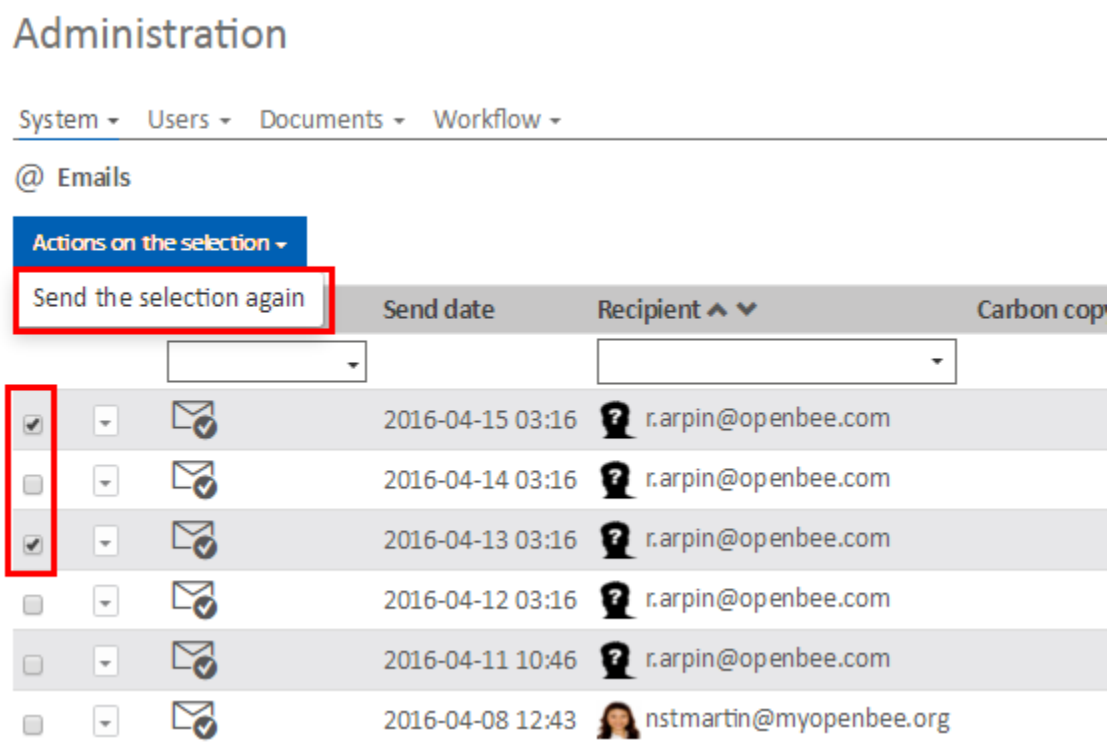


A click on the message content allows to show its details:



It is possible to send again the email by clicking the **"send again**" button.

It is also possible to send again emails in batch from the list:



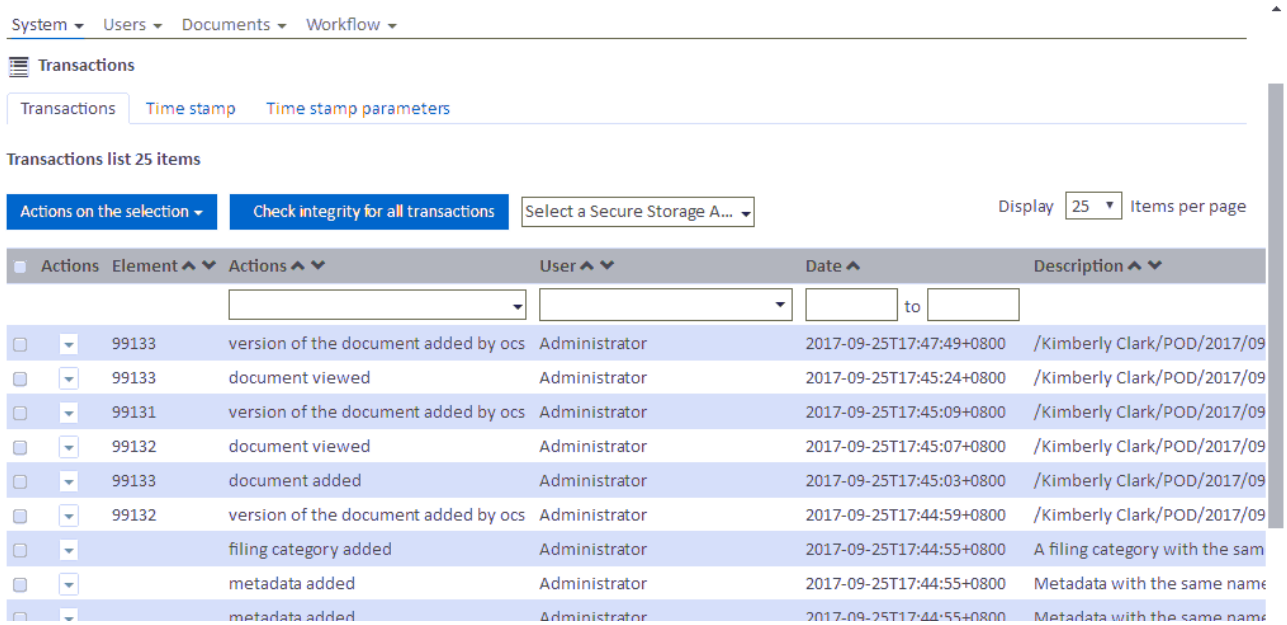
Transactions

Click on **"Administration"** \ **"Transactions"** to access this section, which allows you to consult all the actions performed by users of KOMI Doc.

- Consultation
- Time stamp
- Transactions Integrity
- Integrity of one or more elements
- Batch Integrity
- Integrity for all transactions

Consultation

The list of all actions made in KOMI Doc appears in the "**Transactions**" tab.



Columns details :

- **Element** : Identifier of the element concerned by the action. Example : an action on a document will here contain the identifier of the document.
- **Actions** : The performed action. Example : add a document.
- **User** : The person who performed the action
- **Date** : Date in ISO 8601 format in which the action was performed.
- **Description** : Optional field providing additional information about the action. For folders and documents, it contains the path to the element in the tree structure.
- **Statut** : Action status : operation failed or operation successful.
- **Integrity** : Result of the transaction element's integrity check .
- **Integrity verification date** : Date when the last transaction element's integrity check was made.

The filters on the following elements allow to quickly select the searched information :

- Performed actions
- Users who performed the action.
- Date range
- Integrity
- Integrity verification date

A global filter can also be applied to Secure Storage Spaces.

Time stamp

The transactions'/log items are time-stamped by batch . These batches can be consulted in the **"Time stamp"** tab.

The Tab "**Time stamp parameters**" allows to define the way in which the batches are constituted and time stamped.

Two parameters are used for the creation of these batches:

- The number of records added since the last timestamp.
- The elapsed time since the last timestamp.

These two parameters are set to 1000 items and 24 hours by default. As soon as the system detects that one of these limits is reached, a new timestamp is performed.

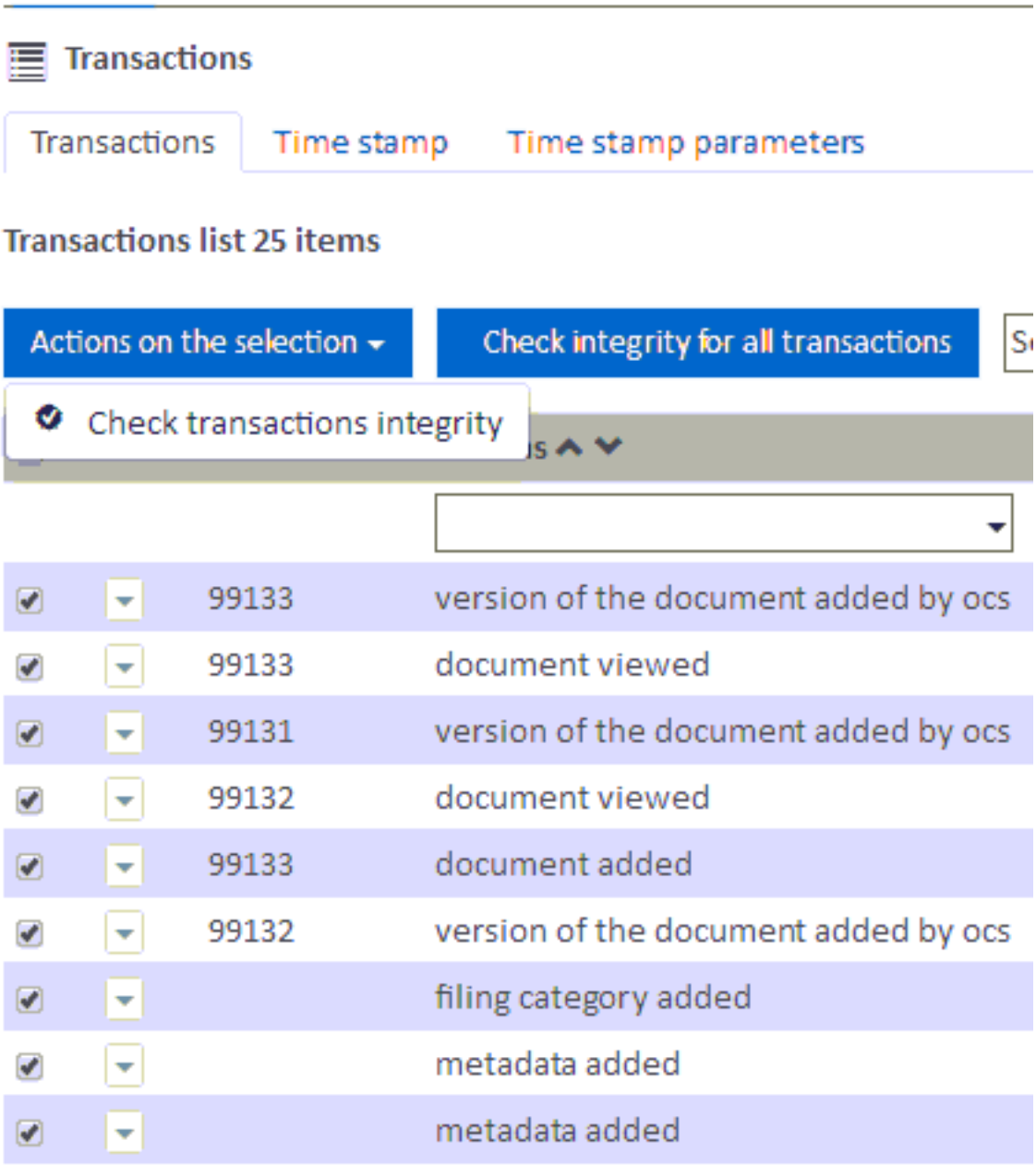
By default, the external time server TSA (Time Stamping Autority) used for time-stamping these batches is that of KOMI Doc.

It is possible to specify in the parameters another server complying with the RFC 3161.

Transactions Integrity

Integrity of one or more elements

To check Transactions integrity, select the transaction items you want to check, then go to the **"Actions on the Selection"** menu.



The result of the integrity check is displayed in the **"Integrity"** column.

The **"integrity verification date"** column contains the date on which the verification was performed. This operation verifies each selected line one by one.

Integrity	Integrity verification date
verified integrity	
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08
✓	2017-09-25 21:08

Check/verification is carried out by comparing:

- An footprint/imprint of the input computed and stored when it was created
- An footprint/imprint of the recalculated entry (according to the same method) at the time of the check/verification

Batch Integrity

It is possible to check/verify the integrity of one or more timestamp batches. This operation is based on the same principle as checking transaction entry, but applies to the batch and all associated entries.

Each batch is also time-stamped with an external server, so a second action can be used to check the external timestamp.

Integrity for all transactions

This operation can be done by clicking on the button **" Check integrity for all transactions "**. The result of the integrity check is displayed in a message at the top of the screen. This operation checks/verifies each batch and their continuity. It thus ensures that all the elements of the transaction are integral.

Users

- Add a user
- Request a user's password change
- Modify user preferences
- De-activate a user
- Users integration from a LDAP source
- Importing a CSV file

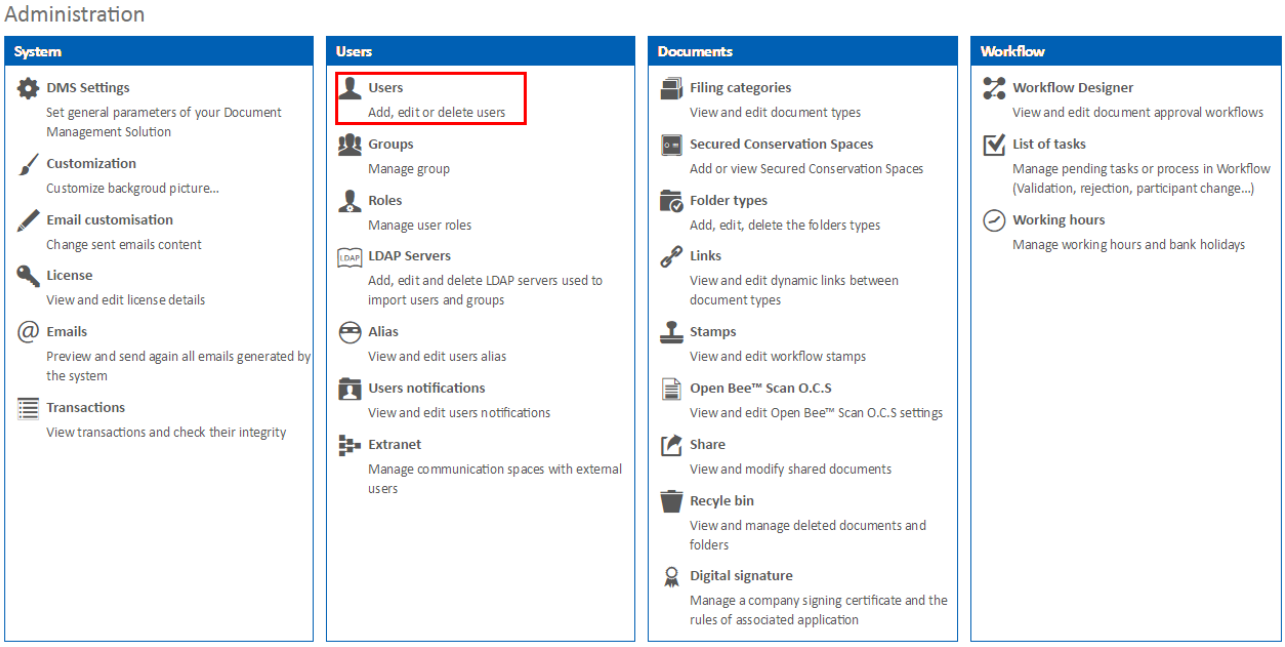
The administrator can :

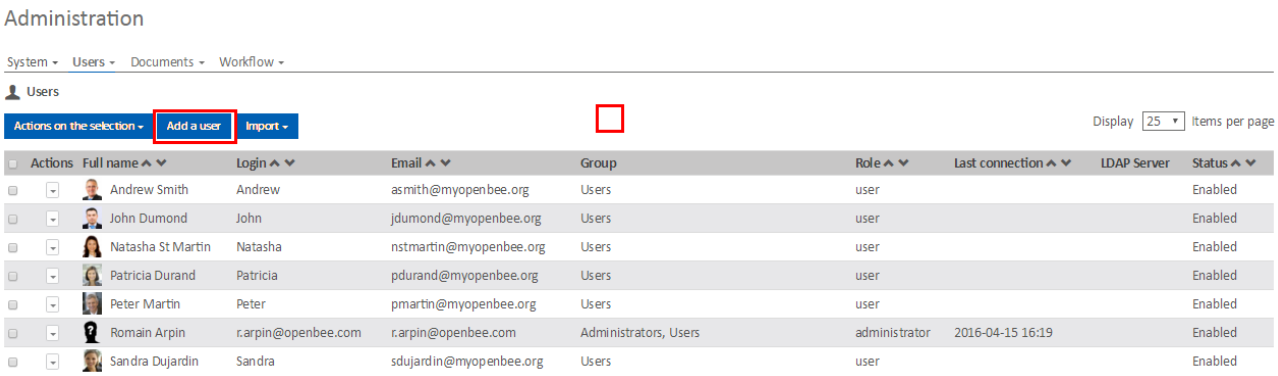
- add
- remove
- modify the users.

This function is essential, it allows to give every person :

- a user account,
- a password
- manage access rights to documents

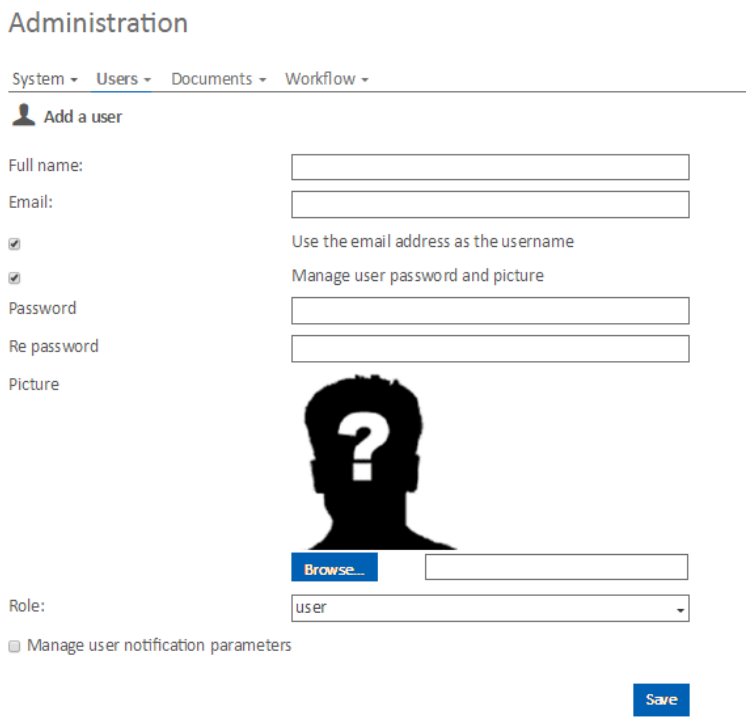
Click on "**Users**", from **"Administration" \ "Users"**





Add a user

Click on the "**Add a user**" icon.

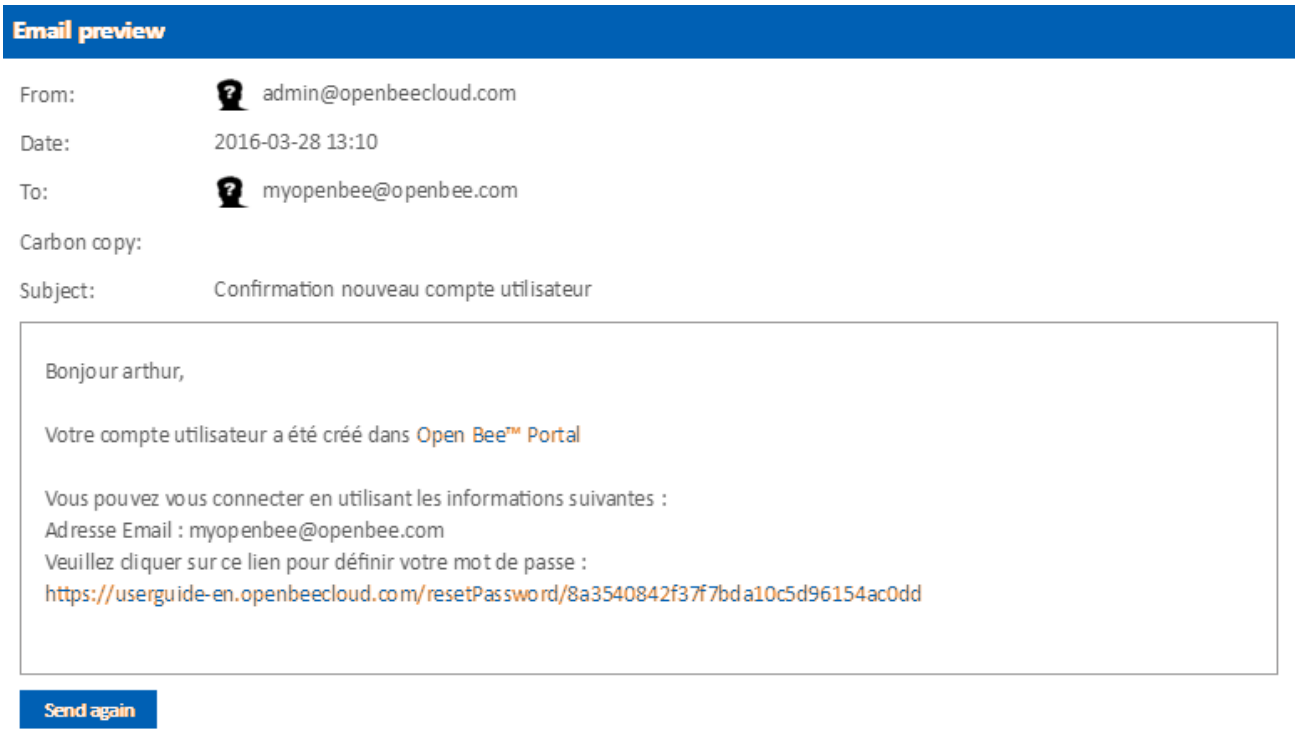


A new user can be added using two different ways :

- The new user's email address is known : fill the required fields and click « **Save** ».
- The new user's email address is unknown : uncheck the box (use the email address as user name), fill the user name which will be used to generate a unique user name in the database.

Note : If the new user's password is not specified by the administrator, a default password (*init*) will be assigned to him.

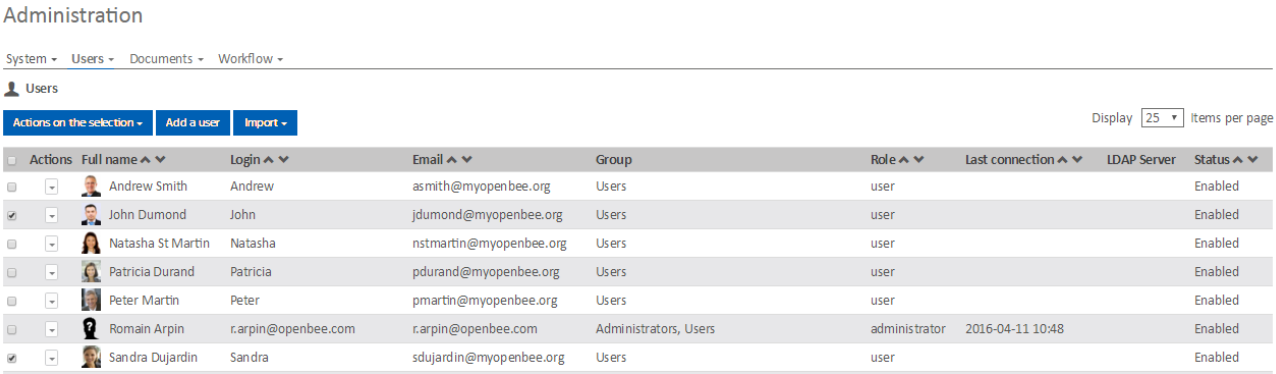
The user receives an email notification as below :



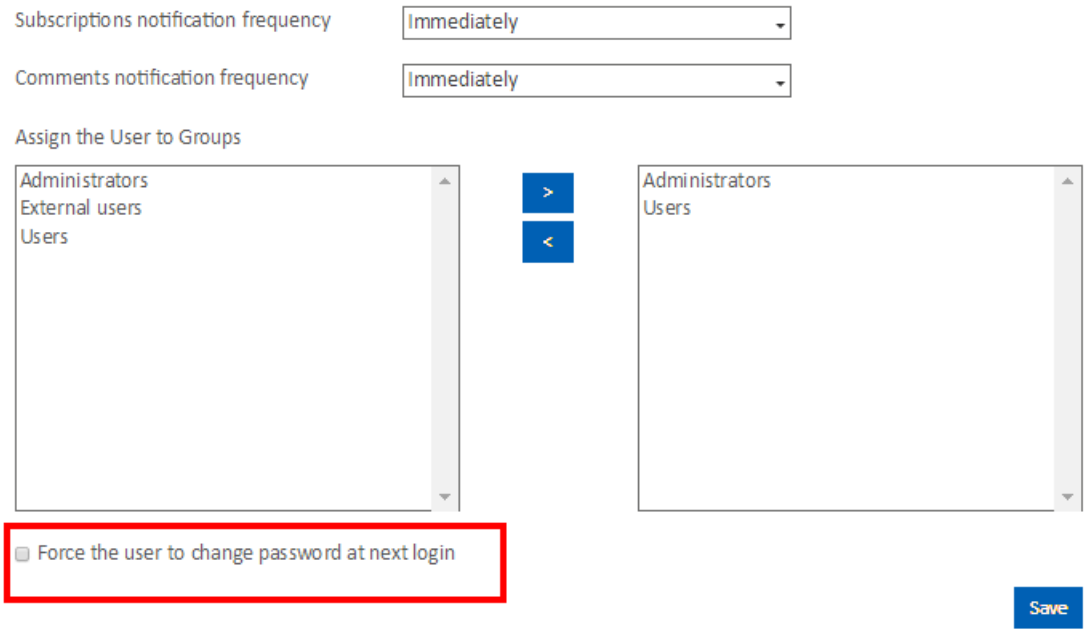
Request a user's password change

Ability to force the user to change their password at next login.

1. **Click on the user name**

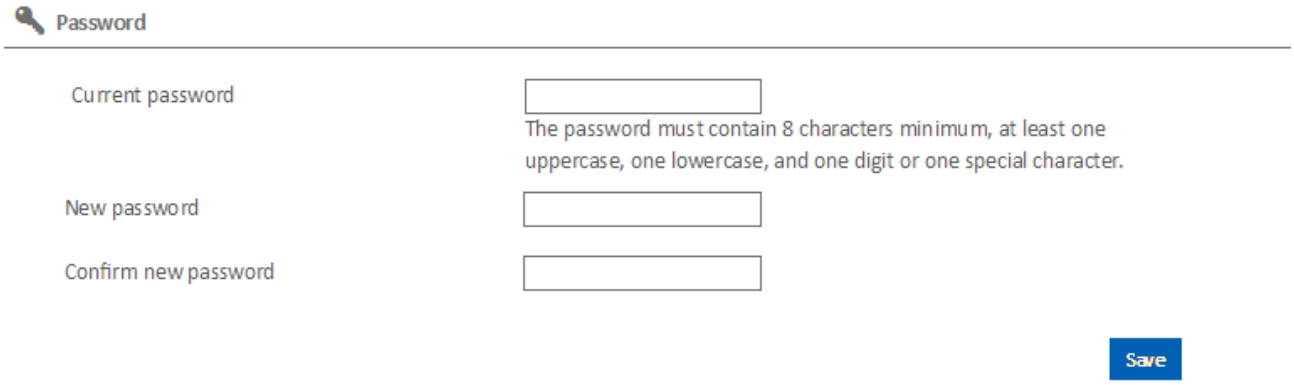


2. **The window appears, check the "Force the user to change password at next login" box and click "Save".**



3. A confirmation message indicates that the information is successfully updated.

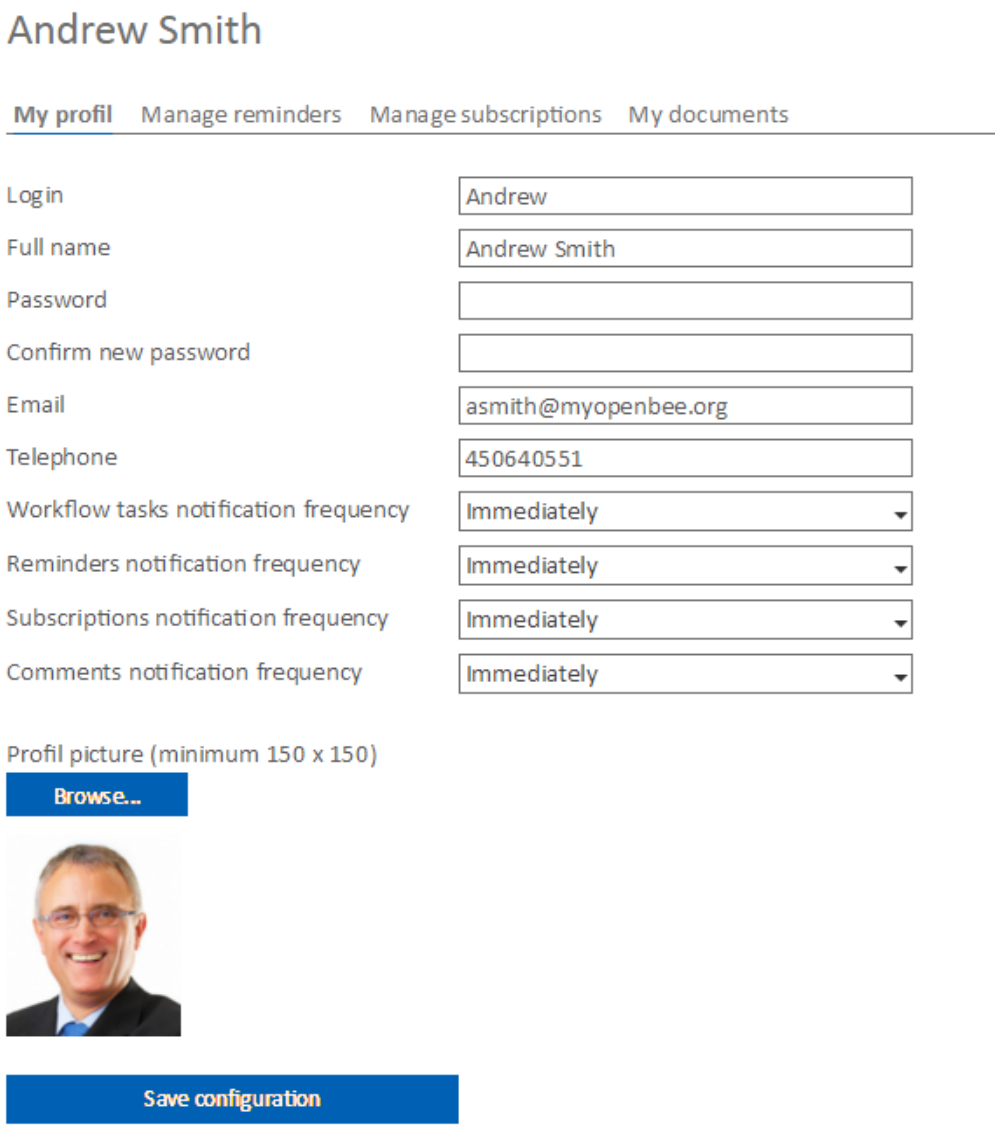
4. Then log in as user, then enter the username / password, before clicking on "Save"



5 . A confirmation message is displayed when connecting: "Password changed successfully"

Modify user preferences

The user can modify his preferences by clicking on "**Preferences**" .



Modify preferences and click **"Save"** to save the modification.

The confirmation message appears "Preferences successfully updated"

Note :

If the user checks email notification, he will receive email notifications for folders which he has subscribed for.

In order to use it, it is mandatory that the settings for sending emails via SMTP server have been configured from the administration interface.

De-activate a user

Check the user's box to de-activate it. A de-activated user can be reactivated at any time.

KOMI Doc does not allow to delete a user ; Any de-activated user will be placed at the end of the list in order to facilitate the navigation. This functional choice allows to keep a history of all actions performed by all users.

Users integration from a LDAP source

Users and groups integration from a LDAP source

Importing a CSV file

This feature allows to create multiple users in a CSV file and then import it.

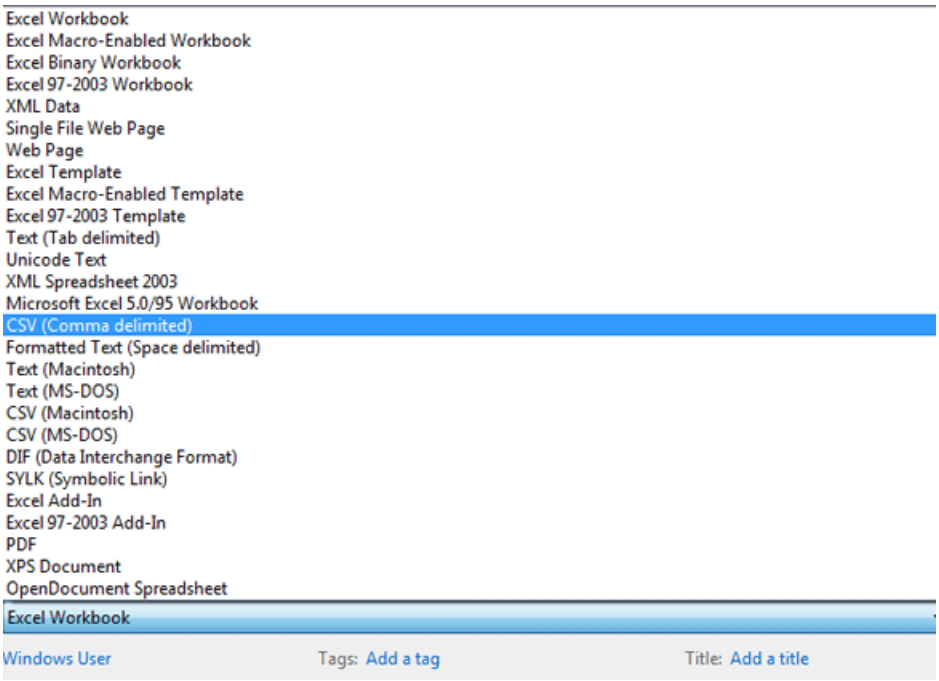
Users will automatically be saved when the import is completed.
To import a CSV file, simply click on **"CSV"**

Example of requested CSV file :

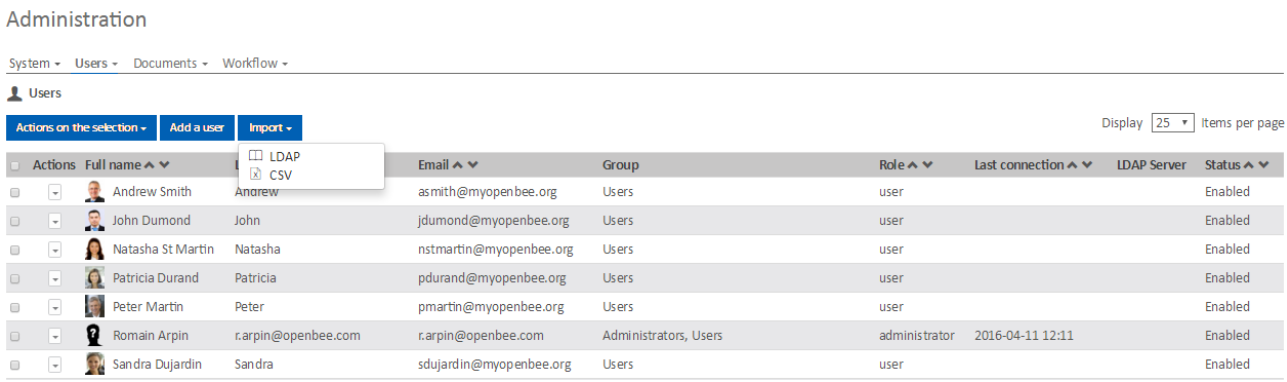
User name - Full name - Email - Phone number - Password

	A	B	C	D	E	F
1	Login	Full name	Email	Phone	Password	
2	Andrew	Andrew Smith	adrew@bijou.com	33450640551		
3	John	John Dumond	john@bijou.com	33450640553		
4	Natasha	Natasha St Martin	natasha@bijou.com	33450640554		
5	Peter	Peter Martin	peter@bijou.com	33450640555		
6	Sandra	Sandra Dujardin	sandra@bijou.com	33450640556		
7						
8						
9						
10						
11						
12						

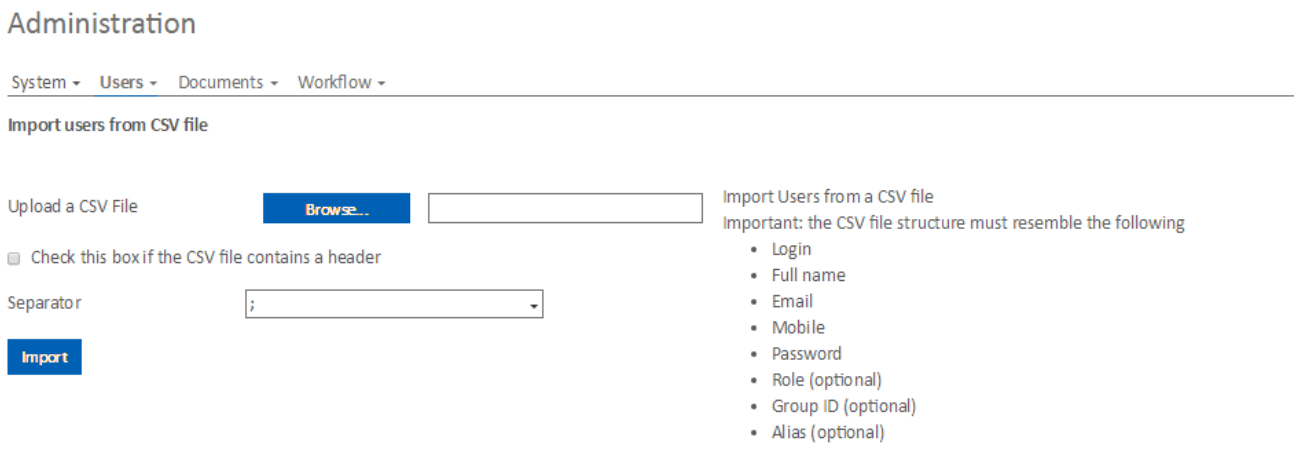
Save your document by selecting CSV for the file type :



From the **"Users"** menu select **"Import" \ "CSV"**.



Load the CSV file from the **"Browse"** button



Check the box if the document contains a header and select the separator from the drop-down menu.

Click "**Import**" .

Once the operation is done, the confirmation message "**Import from CSV File successfully done**" appears

Users will automatically be added in the "**Users**" list.

Groups

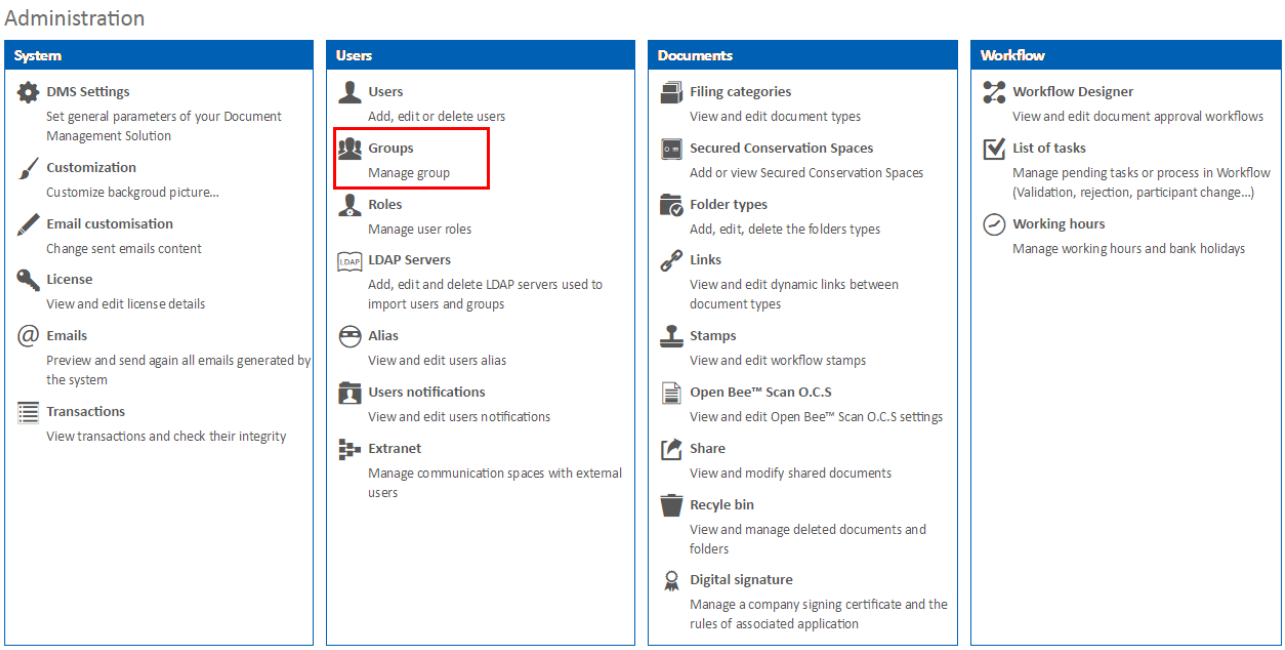
- Add a group
- Remove a group
- Assign users to a given group
- Users and group of users integration from an LDAP source

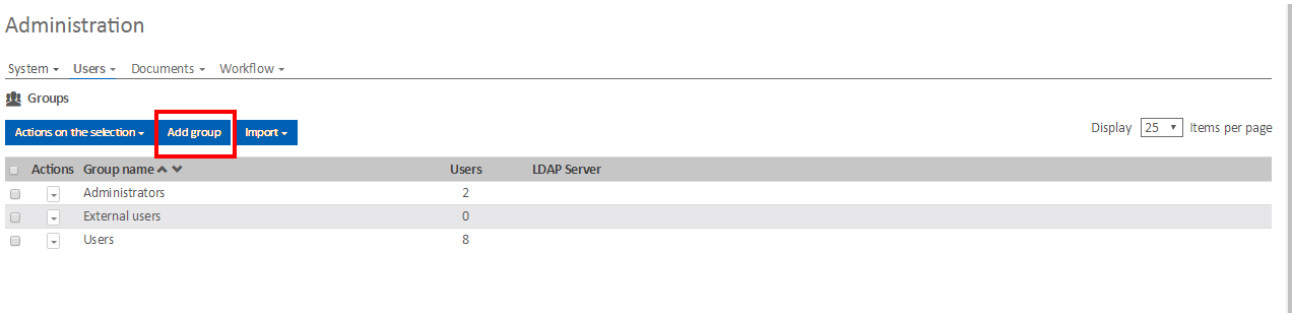
The administrator can:

- add
- remove
- modify the groups of users.

It is essential to associate the created users to one or several group(s).
The membership in a group will allow to define users roles and permissions.

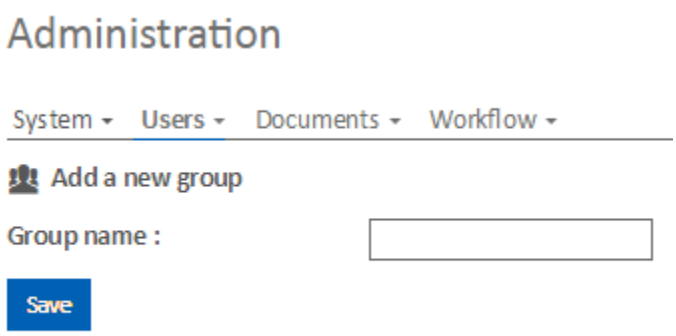
Click on **"Groups**", from "**Administration" \ "Groups"**





Add a group

Click on the "**Add a group**" icon.



Enter the group name and click **"Save"**

A message confirms the creation of the group : **"Group successfully saved"**

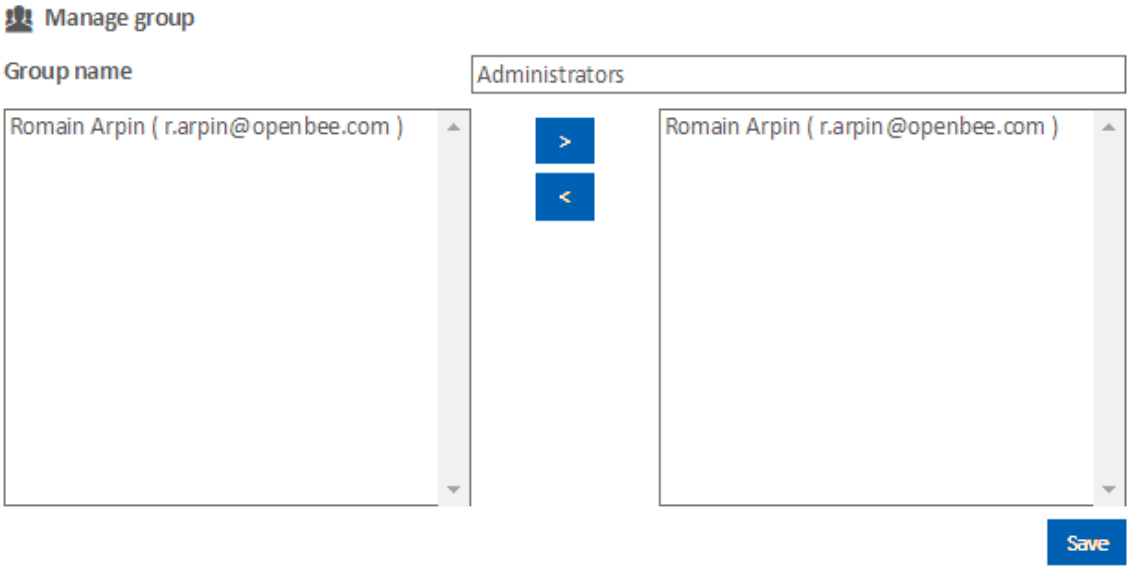
Remove a group

Select the group to be removed then click on the "**Remove**" icon.

A message confirms the group removal.

Assign users to a given group

Click on the group to which users will be assigned.



Select the users to assign to the group by using the button **">"** then click **"Save"** to validate.

A confirmation message appears **" Group successfully updated".**

Users and group of users integration from an LDAP source

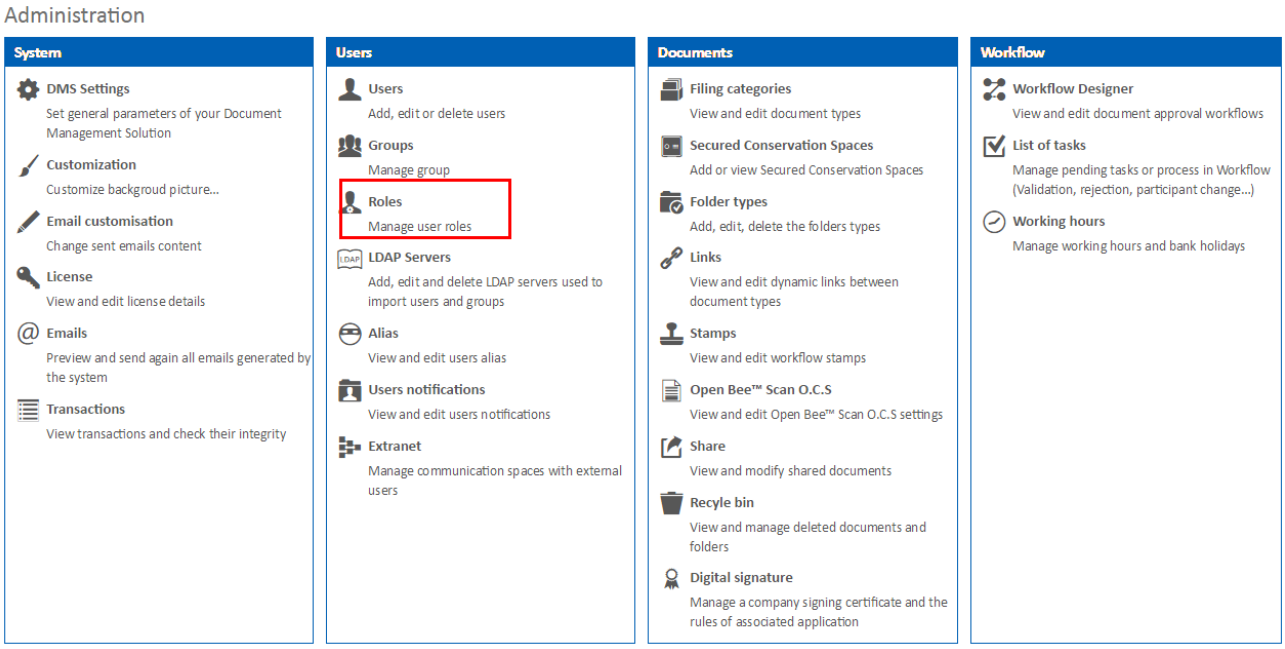
Users and groups integration from a LDAP source

Roles

Roles are used to define different users typologies and limit access to some features of the application.

- System Roles
- Add and modify a role
-
-
- Permissions details
-

Click on "**Administration \ Roles"**



System Roles

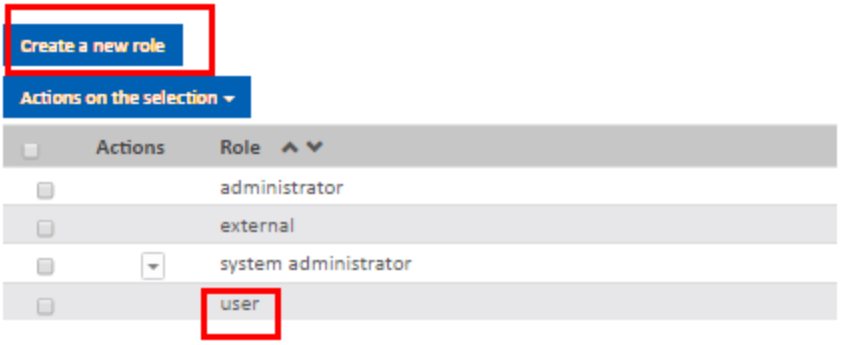
By default, KOMI Doc includes all " System " roles :

- **Administrator** : provides a complete access to all the application and administration features , except Espace Sécurisé de Conservation.
- **Functional Administrator** : allows access to the administration of a Espace Sécurisé de Conservation and other administrative functions: filing rules, extranet, transactions and editing of users who do not have the Administrator's role or Functional Administrator's role ,
- **User** : provides an access to all features, except the ones related to administration.
- **External** : only provides an access to documents. Besides, this particular role limits the user to a sub-folder of the folder tree, which strongly limits its ability to use the product. The users created for an Extranet possess this role.

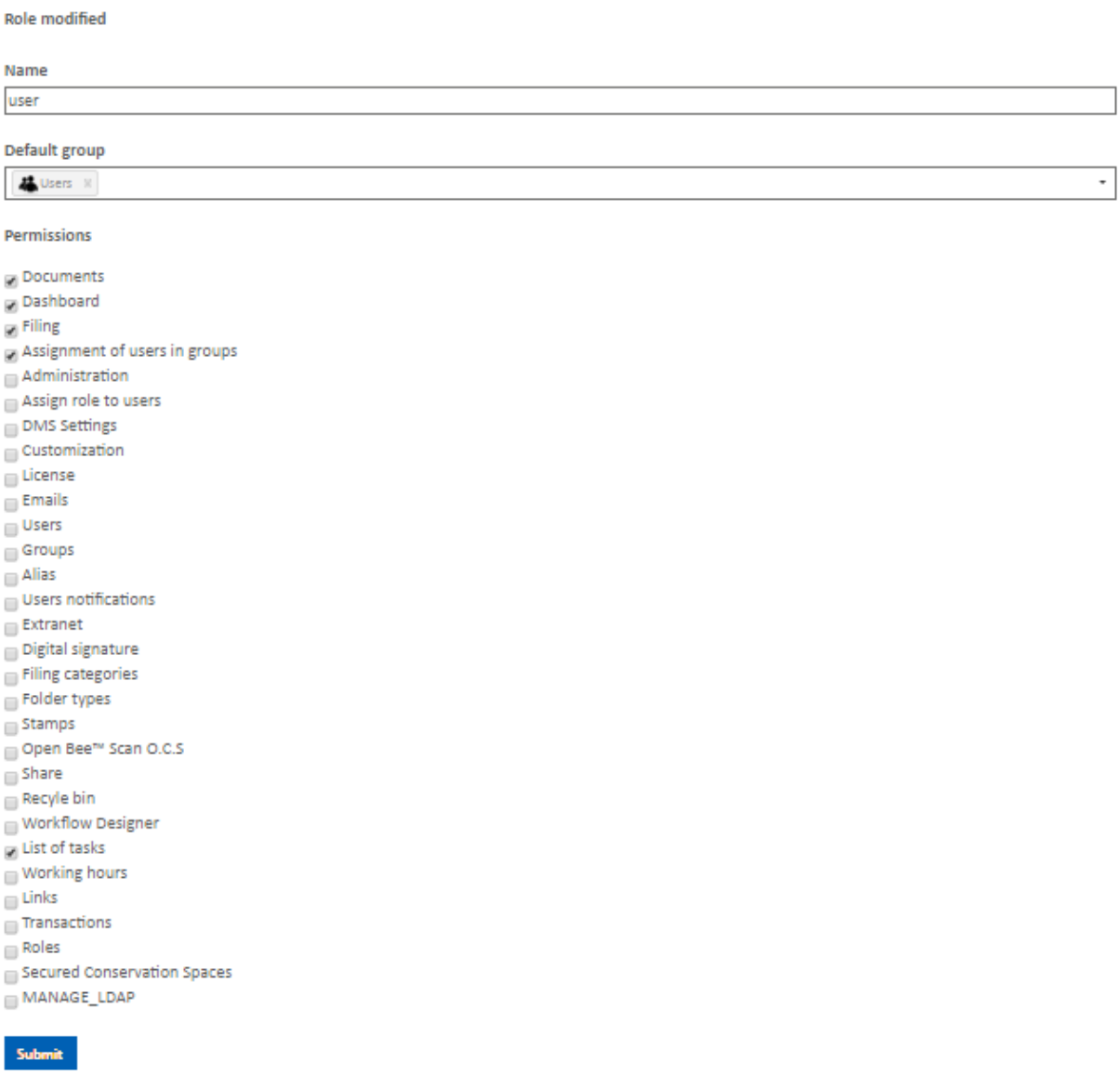
System roles are not removable, but can be modified to some extent.

Add and modify a role

- To add a new role, click on the "**Create a new role**" button.
- To modify a role, click on the role name.



In both cases, the following form appears:



- **Name** : role name, as it appears afterwards in the user creation form.
- **Default Group** : group to which a user is automatically assigned when created with this role.
- **Permissions** : application features that the user assigned to this role can use .
- **Permissions details**
-
-

- **Dashboard** : access to the dashboard
- **Documents** : access to the navigation in the documents tab

- **Filing** : access to the filing zone and the "drop zone"
- **Administration** : mandatory for an access to the administration section. Checking this role alone allows to only display the **"Administration"**menu. Each of the administration sub-sections has a corresponding permission.
- **Manage a group of users** : allows to assign users to a group
- **Manage an administrator account** : allows to modify the users accounts with the "**administrator**" and "**functional administrator**" roles.
- Other permissions correspond exactly to the different sections of the Administrator Guide

Users and groups integration from a LDAP source

- Introduction
- Functioning and different import modes
- Import

Introduction

Instead of manually creating users in KOMI Doc, these can be imported from an LDAP authentication source (typically an Active Directory).

It insures that the users and the groups are correctly configured, involving a limited intervention from the administrator.

The user doesn't need to remember an additional password for the EDM system as its authentication will be deported on the LDAP directory.

Functioning and different import modes

Several import modes are available :

1. Import all groups and users present in the LDAP
2. Import certain groups
3. Import certain groups and all users belonging to these groups
4. Import certain users
5. Import certain users and all the groups to which they belong

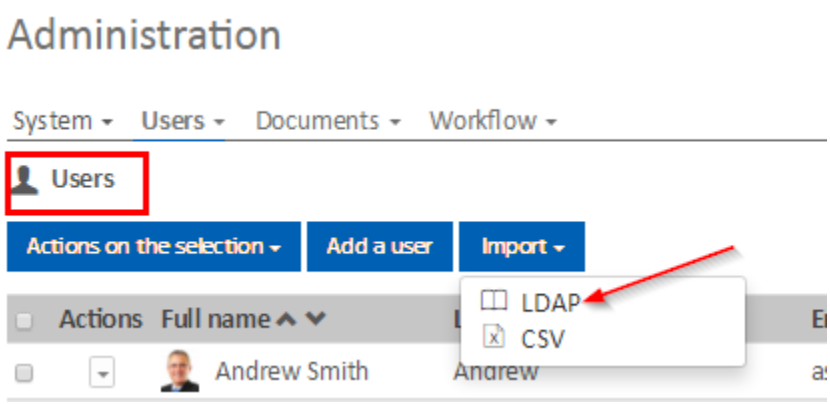
Depending on the chosen mode during the import, all or part of the changes made in the LDAP directory will be automatically reflected in KOMI Doc:

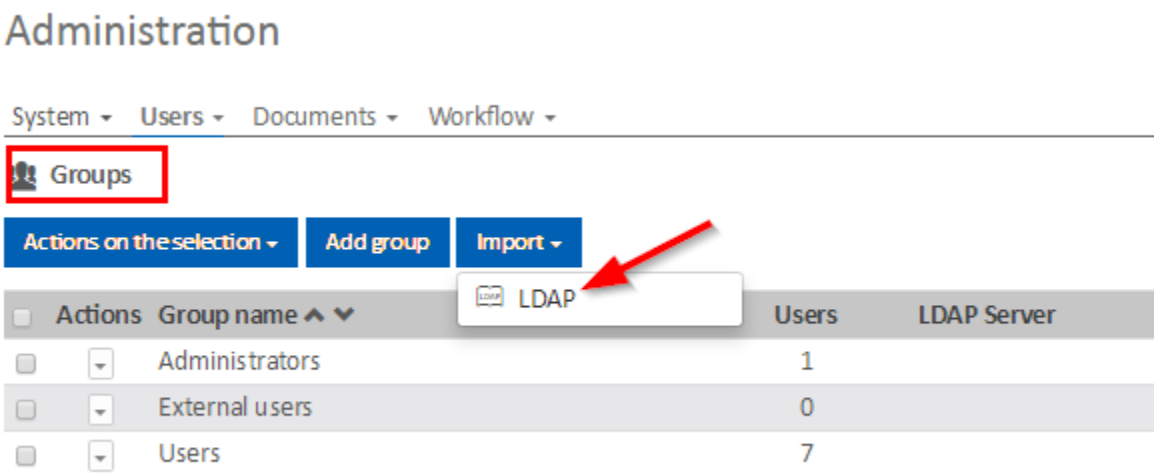
- User name modification

- Group name modification
- Modification of the users from a group
- Modification of the groups for a user
- Groups addition
- Users addition

Import

The import function concerns the groups and users. It is accessible from the **"Users"** or **"Groups"** sections in the **"Administration"** section.

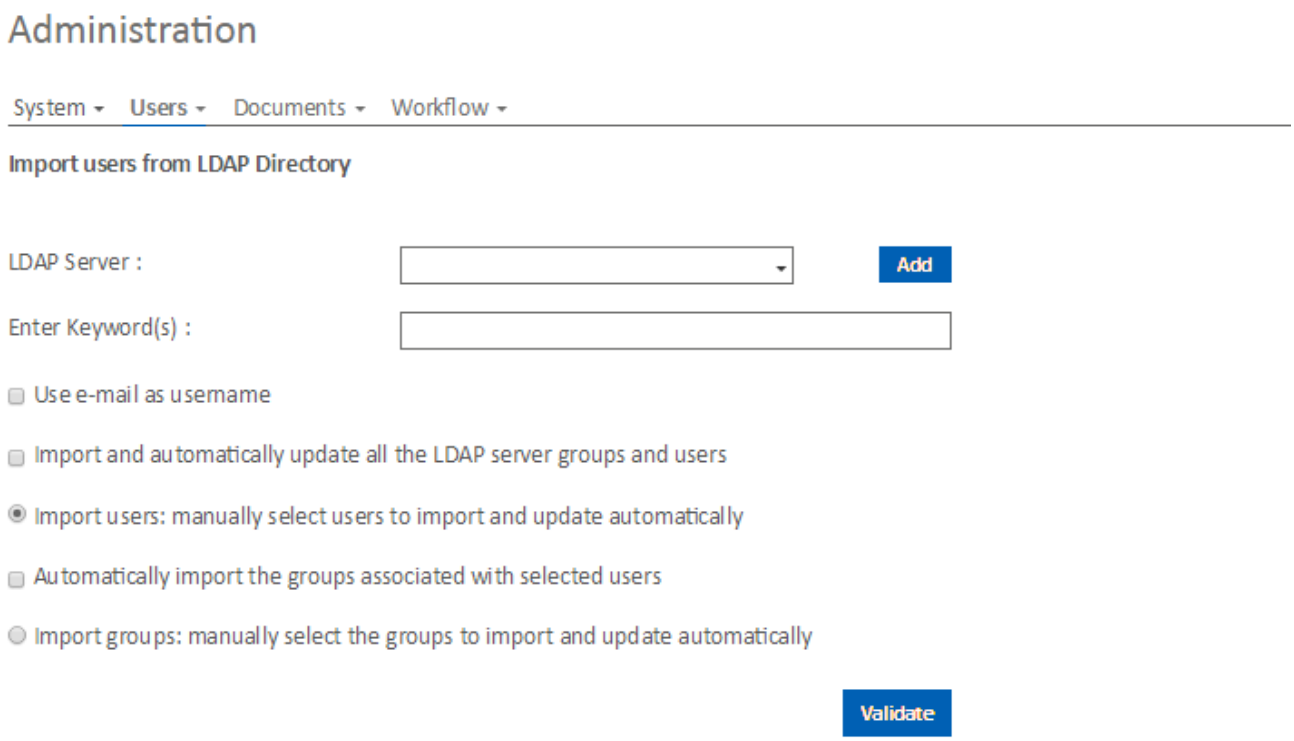




If your LDAP server is already registered in the system (in a previous import), select it from the list of available servers.

Otherwise, register a new server by clicking the **"Add"** button, which will open a window allowing you to fill in the login information.

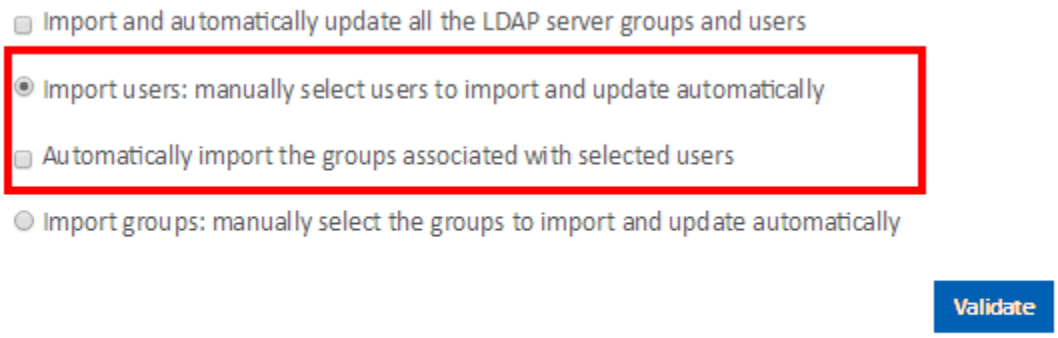
The LDAP servers list is editable at any time in the **"Administration \ LDAP servers"** section.



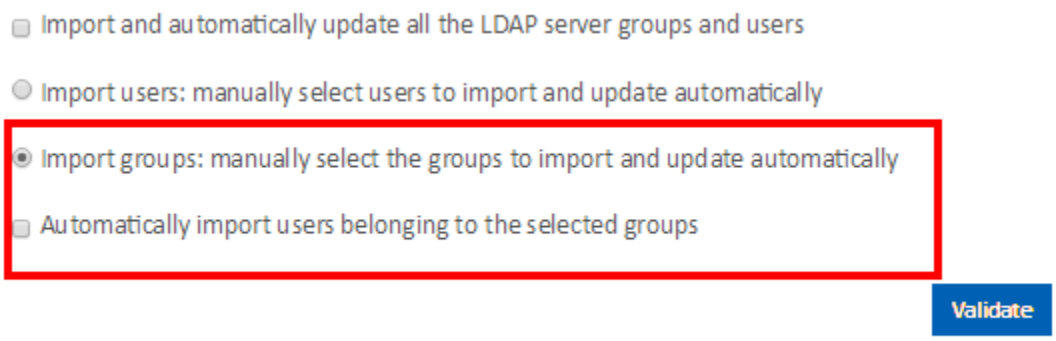
- Import all groups and users present in the LDAP (case 1. desrcibed above):
    - Check the **"Import and automatically update all the LDAP server groups and users"** box
- Import only certain groups or users:

- Uncheck the **"Import and automatically update all the LDAP server groups and users"** box
- Select users or groups to be imported

Import users



Import groups



Click "**Validate**" to finish the operation.

Note : It is possible to import automatically:

- Groups associated to the selected users
- Users associated to the selected groups

Single Sign On in an Active Directory environment

This function allows a user to access KOMI Doc without entering his password, providing that the user is logged in to his Windows session.

- Prerequisites for SSO connection in KOMI Doc
- Configure browsers for SSO
  - Internet Explorer
  - Firefox
- Frequent problems

Prerequisites for SSO connection in KOMI Doc

• The server is part of an Active Directory domain
• The user is imported from the Active Directory LDAP
• Users logged in the domain, on their Windows device
• The user's browser has been configured as described below
• The SSO authentication is activated in the General configuration

Configure browsers for SSO

Internet Explorer

Make sure that **"Activate Windows integrated authentication"** into the advanced Internet Explorer options is checked. Consider adding the URL to the list of trusted websites of the local Intranet under the **"Security"** tab in the Internet Explorer options.

Firefox

Type “**about:config**” in the address bar and press enter.
Modify the "network.negotiate-auth.delegation.uris" value and add the domain name for which you want to activate the automatic sending of information.

Note : it may be necessary to also change the value "network.automatic-ntlm-auth.trusted-uris" and add https:// or http:// follow by the name of the server on the domain.

Frequent problems

On Windows Vista or Seven :

- The navigator sends back an Internal Server Error
- Add a value in the register base : HKEY_LOCAL_MACHINE/SYSTEM/CurrentControlSet/Control/Lsa
- Add a new value DWORD
- Rename it « LmCompatibilityLevel » put it to « 1 »

Alias

Aliases are not a full feature. It is a tool **allowing to dynamically assign a document to a user in a Workflow according to metadata values.**

- Add an alias
- Remove aliases

An alias could be seen as a shortcut towards a user: it allows to match a character chain to a user.

The administrator associates aliases to users.

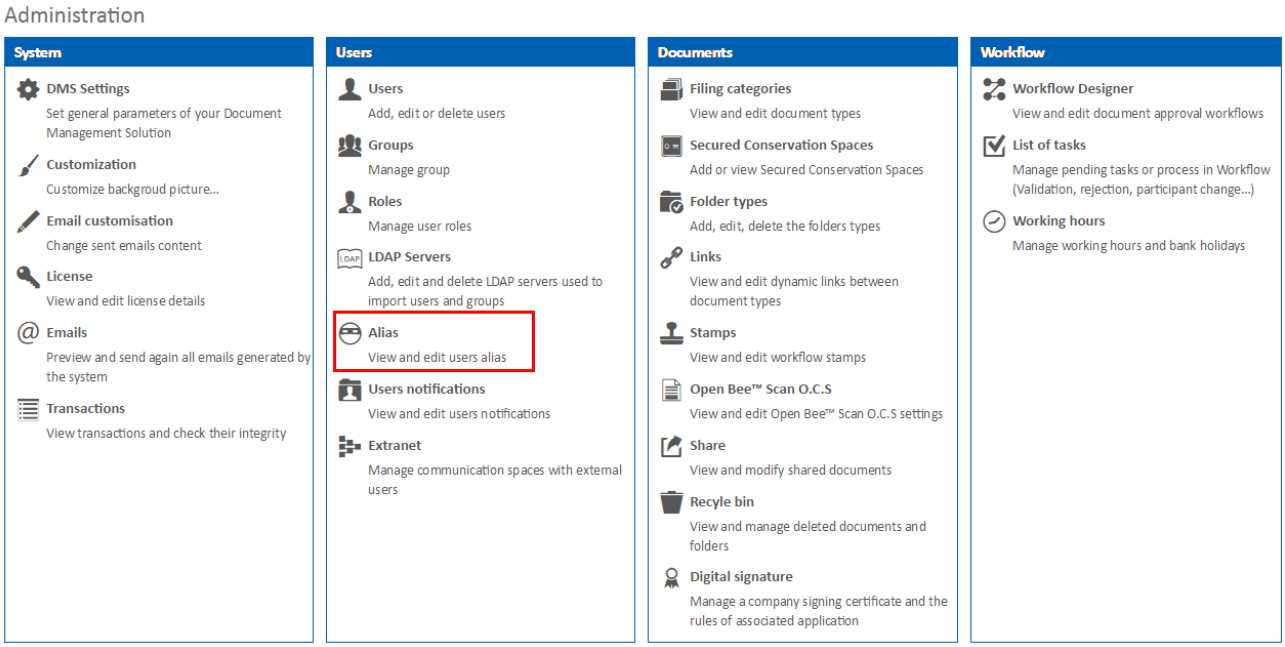
These aliases are then used in workflows to dynamically assign tasks to users according to a document metadata.

See the **"Dynamic participants"** section of the "Création et modification des tâches" page.

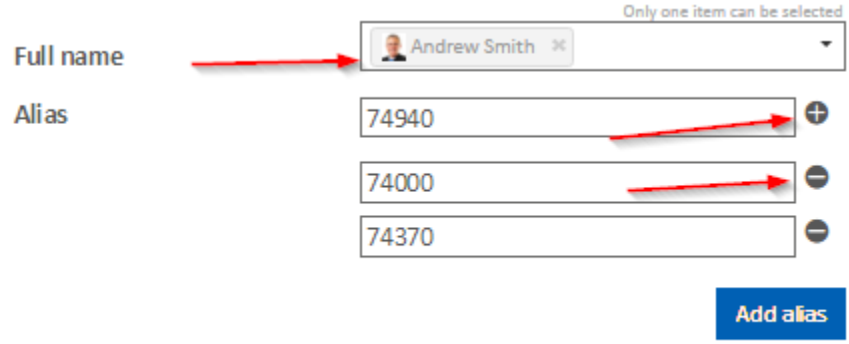
Add an alias

By default, no alias is created.

To create aliases, click on "**Administration**" \ "**Alias**".



Click on the "**Add an alias**" button



After selecting a user, enter one or more aliases for this user.

Use the " ⊕ " and " ⊖ " buttons to remove and add alias fields to the form.

The created aliases appear in the alias list.

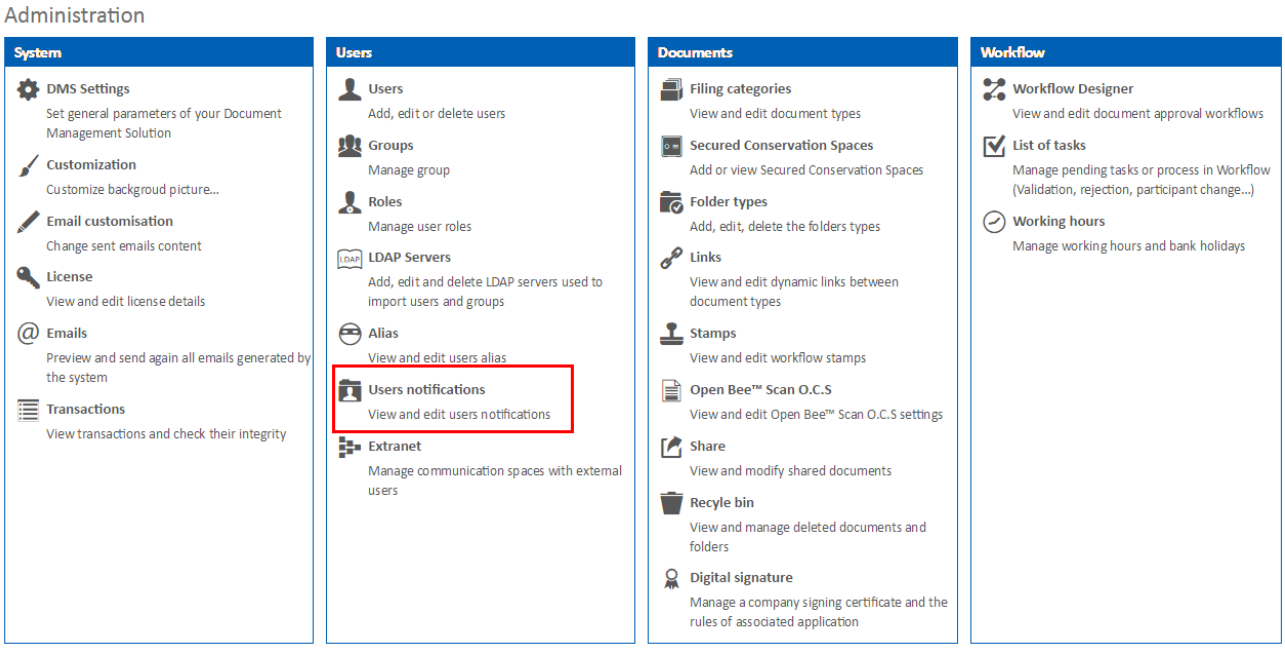
Remove aliases

To remove one or more aliases, check the corresponding boxes and choose **"Remove selection**" in the menu.

Users notifications

Users notifications

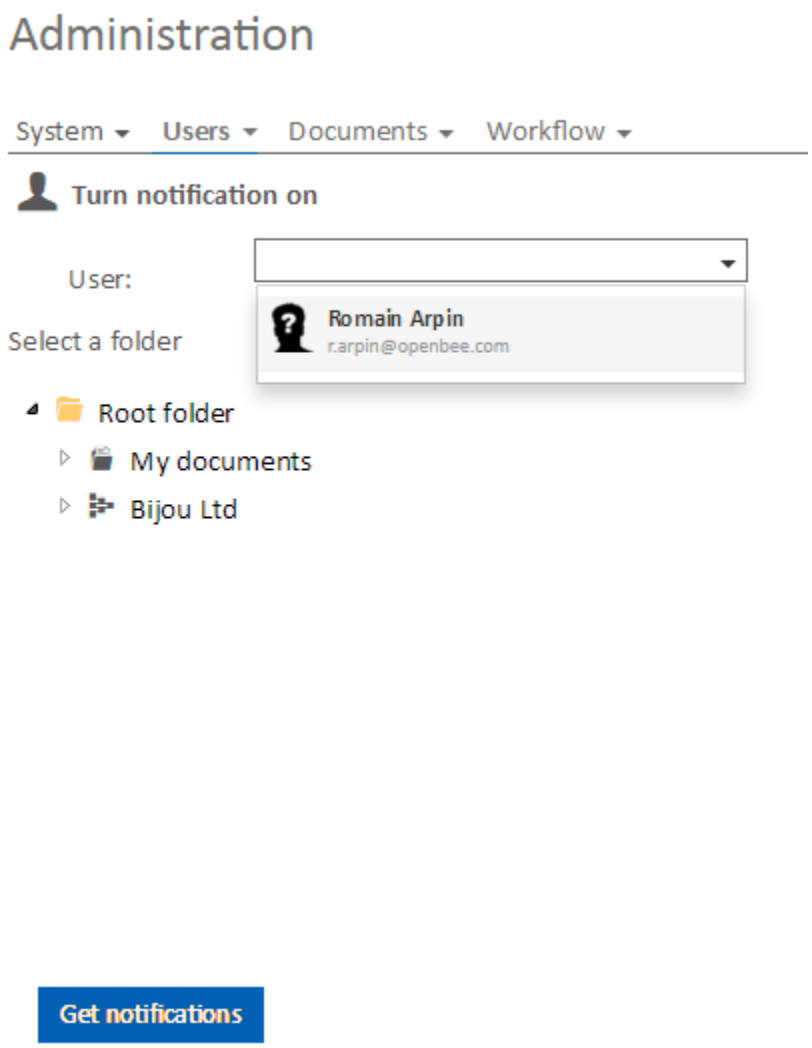
A dedicated section of the administration allows to view and manage users notifications.



This interface works the same way as the one allowing a user to manage ses souscriptions, with some particularities:

- All users notifications are displayed, it is possible to filter by user.

- To add a notification, it is necessary to select a user in the first place.



Extranet

The **"Extranet"** section simplifies the availability of documents to external users.

Customer Relation or HR Relation Portals are the most common Extranet use cases.

The use of an extranet requires a license allowing the creation of external users.

Click on **"Administration" \ "Extranet"** to access the administration space.

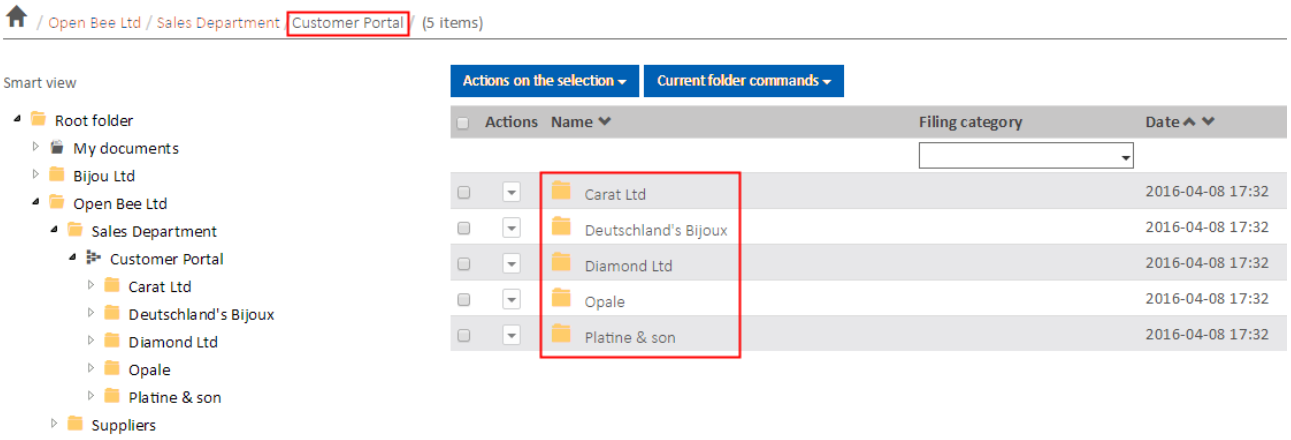
Prerequisites and operating principle

An extranet requires a personal folder for each user having access to the extranet.

These folders must meet several prerequisites:

- Being grouped in a “parent” folder called the extranet **"root folder"**.
- Being named in order to identify the user in a unique way. Example: a serial number or social security number. Using a “name” is not recommended due to the risk of having two users with the same name. The combination of an identifier and a name is ideal since it allows both to ensure the uniqueness of the file while ensuring that the name is speaking for a user.

Below is an example of an extranet tree structure: "**Customer Portal"** is the extranet root folder and contains users' folders.

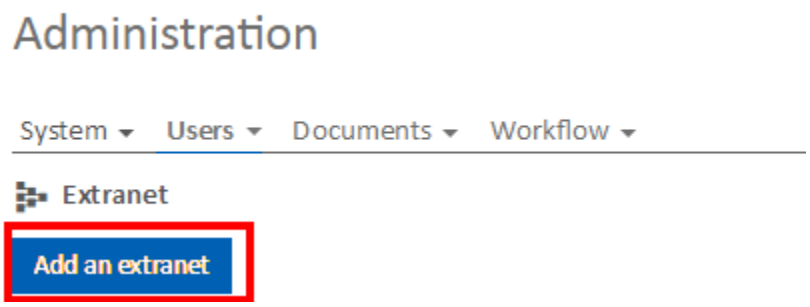


Extranet functions as follows:

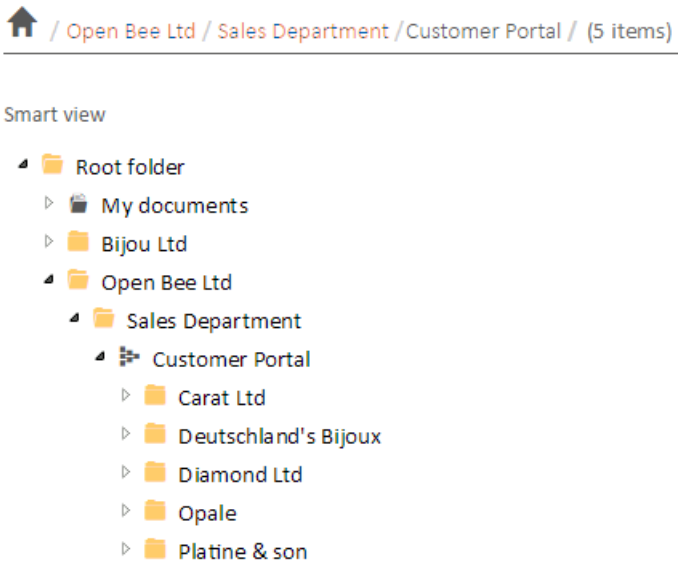
- Publish documents towards users in their own folders.
- Create accounts for those users and associate them with the corresponding folders by automatically applying the necessary permissions.

Create a new extranet

Click on **"Add an extranet"**



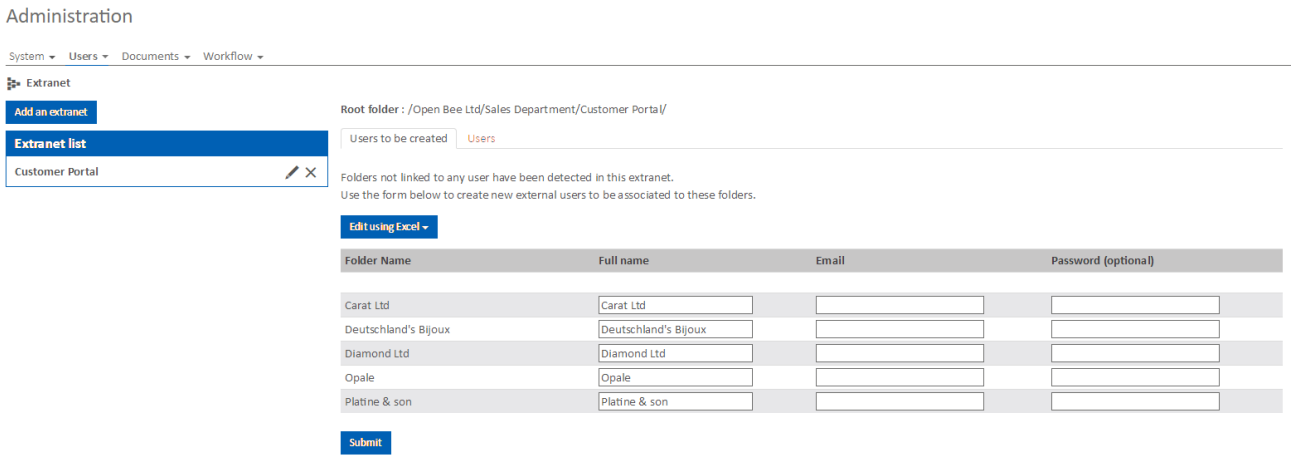
Select the root folder of the extranet:



Extranet users

Create users

Once created, the extranet automatically detects users' folders and suggests to create external users for those folders.

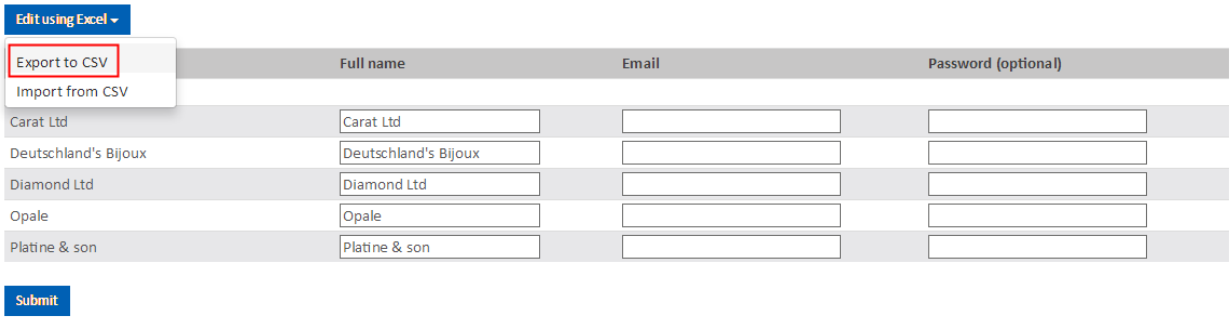


From the interface:

- For all or some of the folders of the extranet, enter the name, email and an optional password for the user to create.
- Click on **“submit”.**

For excel import:

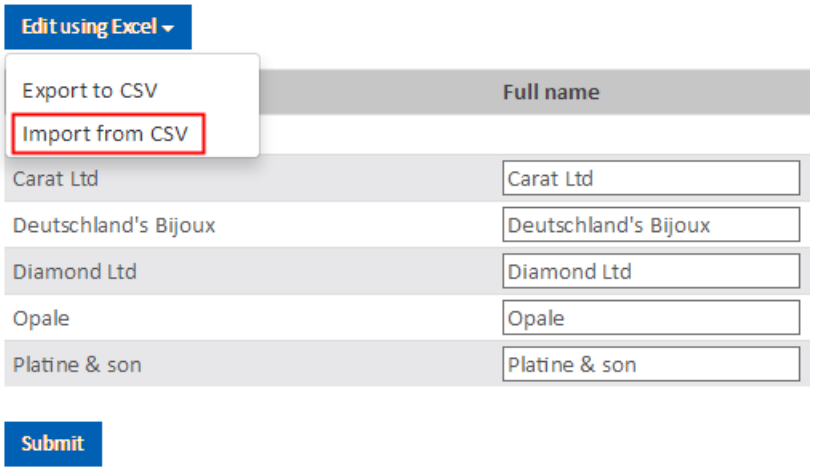
- Click on "**Edit using Excel"** then on **"Export to CSV"**.



- A CSV file containing the list of files is downloaded :
- Open the file in Excel and complete columns "Full Name", "Email" and "Password" (optional).

Folder Name	Full name	Email	Password
Carat Ltd	John Smith	john@carat.com	
Deutschland's Bijoux	Peter Pfeiffer	ppfeiffer@bijoux.de	
Diamond Ltd	Mike Jackson	mj@diamond.co.uk	
Opale	Danni Basco	purchase@opale.com	
Platine & son	Natasha McKenzie	natasha@platine-son.com	

- Save the file .
- Click again on **"Edit using Excel"** then on **"Import from CSV".**



- Select the CSV file that you have completed. The users are created and associated to the extranet folders.

Users will receive their access codes by email.

Extranet users belong to the group " External users " . For data privacy reasons, by default, this group does not have access to any folder.

It is thus necessary to add reading permissions on the extranet root folder (apply recursively on the sub-folders) before the users can consult the content.

Create multiple users for the same Extranet folder

It is possible to associate several external users to the same extranet folder by using the CSV import.

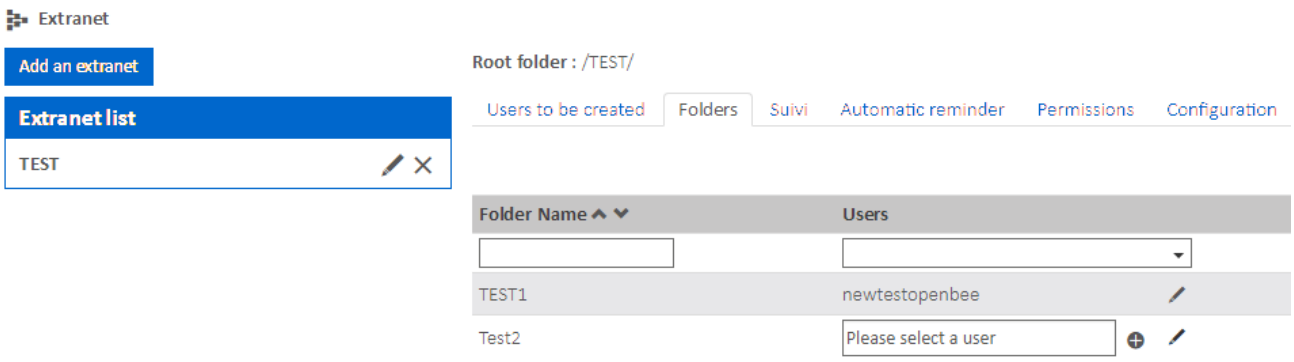
To do this, duplicate the line associated to the folder in the CSV file and enter the users' information to create additional users.

In the example below, two users «John Smith» and «Mickael Parker» will be created and will have access to the same folder: «Carat Ltd».

Folder Name	Full name	Email	Password
Carat Ltd	John Smith	john@carat.com	
Carat Ltd	Mickael Parker	mickael@carat.com	

Attach and detach users from a folder

Once created, the users attached to the folder can be consulted from the **"Folders"** tab .

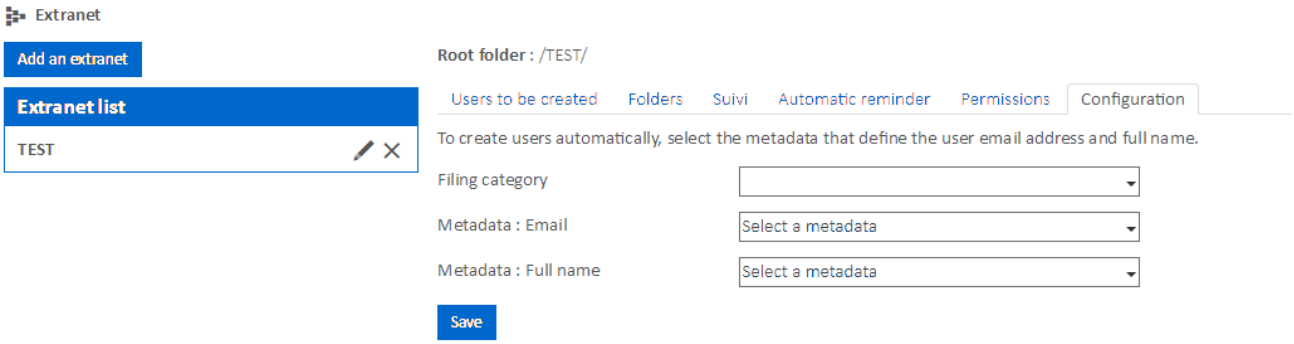


Click on the pencil to modify the users attached to the folder. You can also add or delete users with access to the folder.

A simple click on the user allows to change it the same way as described in "**Administration \ Users"** section.

Creating users automatically

The **"Configuration"** tab allows to define two metadata which will be used to identify the name and the email of the users. If this configuration is enabled, the extranet will automatically create the user if it does not exist when filing/archiving the first document.

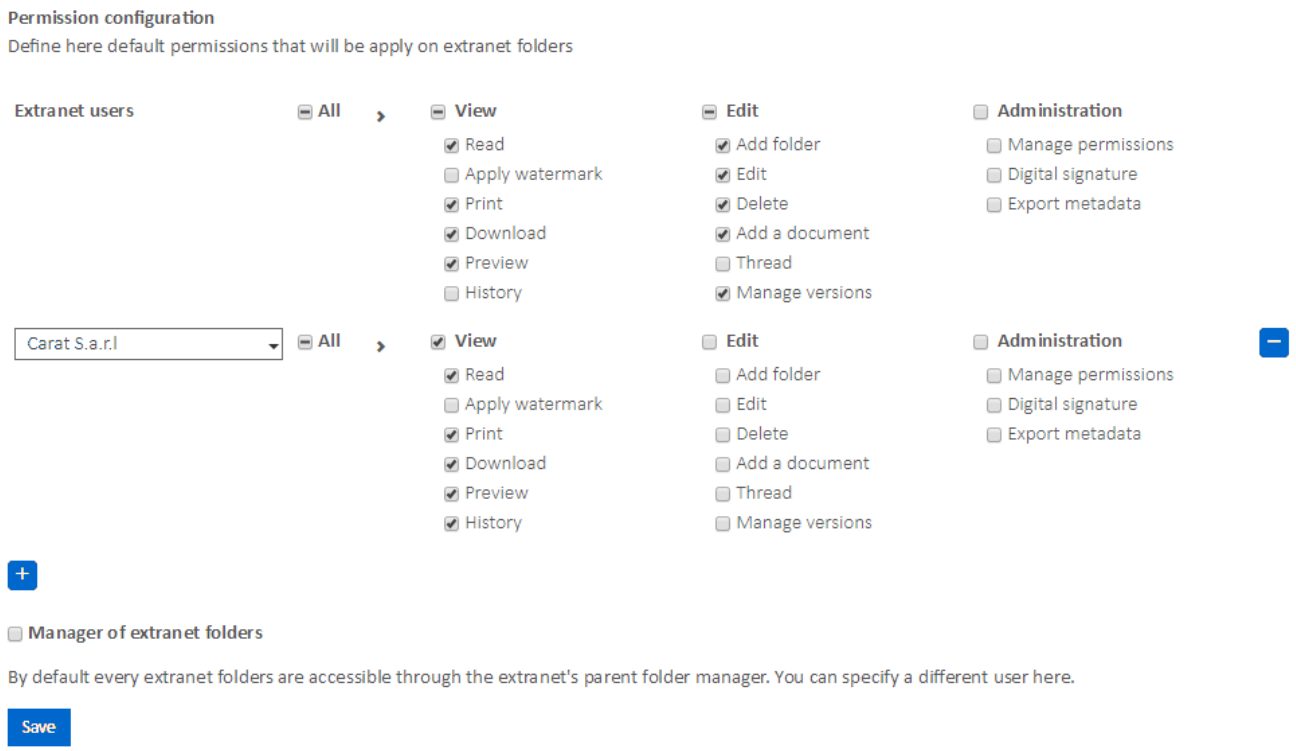


This feature allows 100% automation of document distribution to customers or employees.

Permissions

The "Permissions" tab allows to configure permissions that will be automatically applied to different users when creating extranet folders.

1. By default, only a set of permissions is defined for the external user who will be associated with the extranet folder. You can change it.
2. The "+" button allows you to assign permissions for other users of KOMI Doc. Consider adding permissions here for "standard" users who will have to access the various files on the extranet.
3. You can change the Extranet folder manager. This option is visible only if you have a license that includes the Digital Safe Box. It allows you to set up an Extranet, each folder is a Secure Space of Conservation.

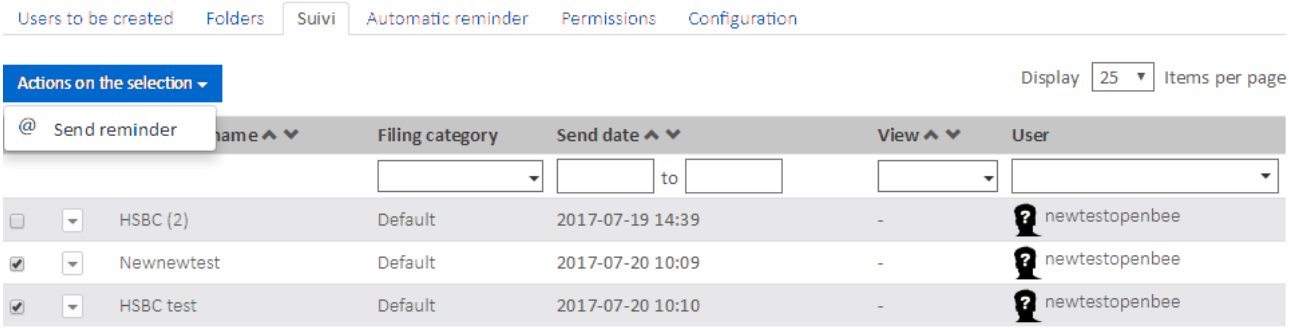


Follow-up of consultations and reminders

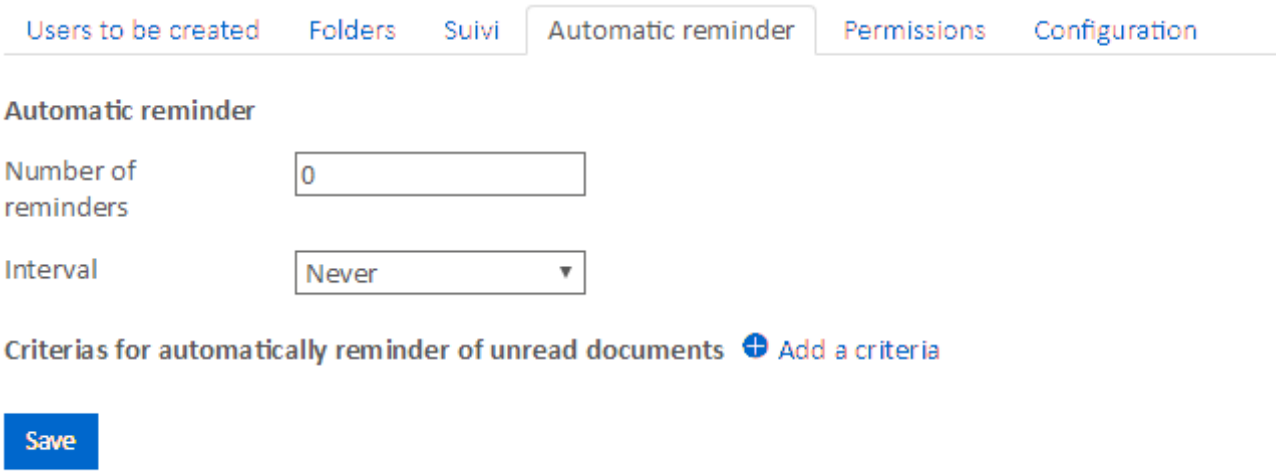
Once the documents have been published in an Extranet, it is possible to follow which documents have been consulted or not by the users of the extranet from the **"Follow-up"** tab.

Filters by **"View"** (viewed or never seen) and by **"User"** are available.

It is possible to send a reminder by email to a user who has not consulted one or more documents.



Reminders can be automated from the **"Automatic reminder"** tab.



The number of reminders indicates the number of times that a dunning email will be sent to the user as long as the user has not consulted certain documents available on his extranet.

The frequency is used to define the interval at which reminders are sent.

The reminder's criteria make it possible to limit the reminder to certain typologies of documents.

Rename an Extranet

Click on the extranet in the list. It is then possible to rename it. During this operation the extranet root folder will also be renamed.

Remove an extranet

It is possible to remove an extranet.

This operation :

- Retains all documents and /foldersrecords of the extranet
- Disables the extranet users

Once an extranet is removed, it is possible to restore access to the extranet to a user by reactivating it from the **" Administration \ Users "** section.

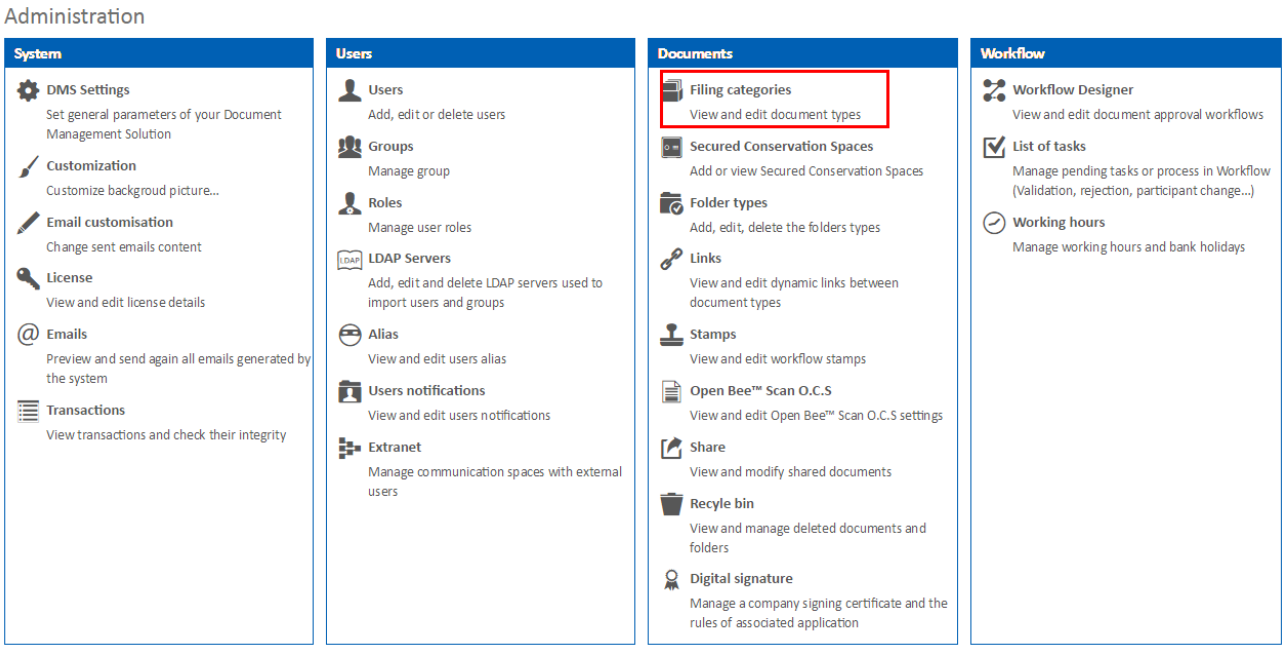
Filing categories

Filing categories are a fundamental notion of the KOMI Doc solution.

This feature allows to manage the filing and renaming, in a uniform and centralized way, of all the documents which will be classified, regardless of the user and the connected application.

By defining filing categories based on document types, you make sure that your tree classifying structure is homogeneous.

In order to manage filing categories, click on "**Administration**" \ "**Filing categories**"



KOMI Doc comes with preconfigured filing categories.

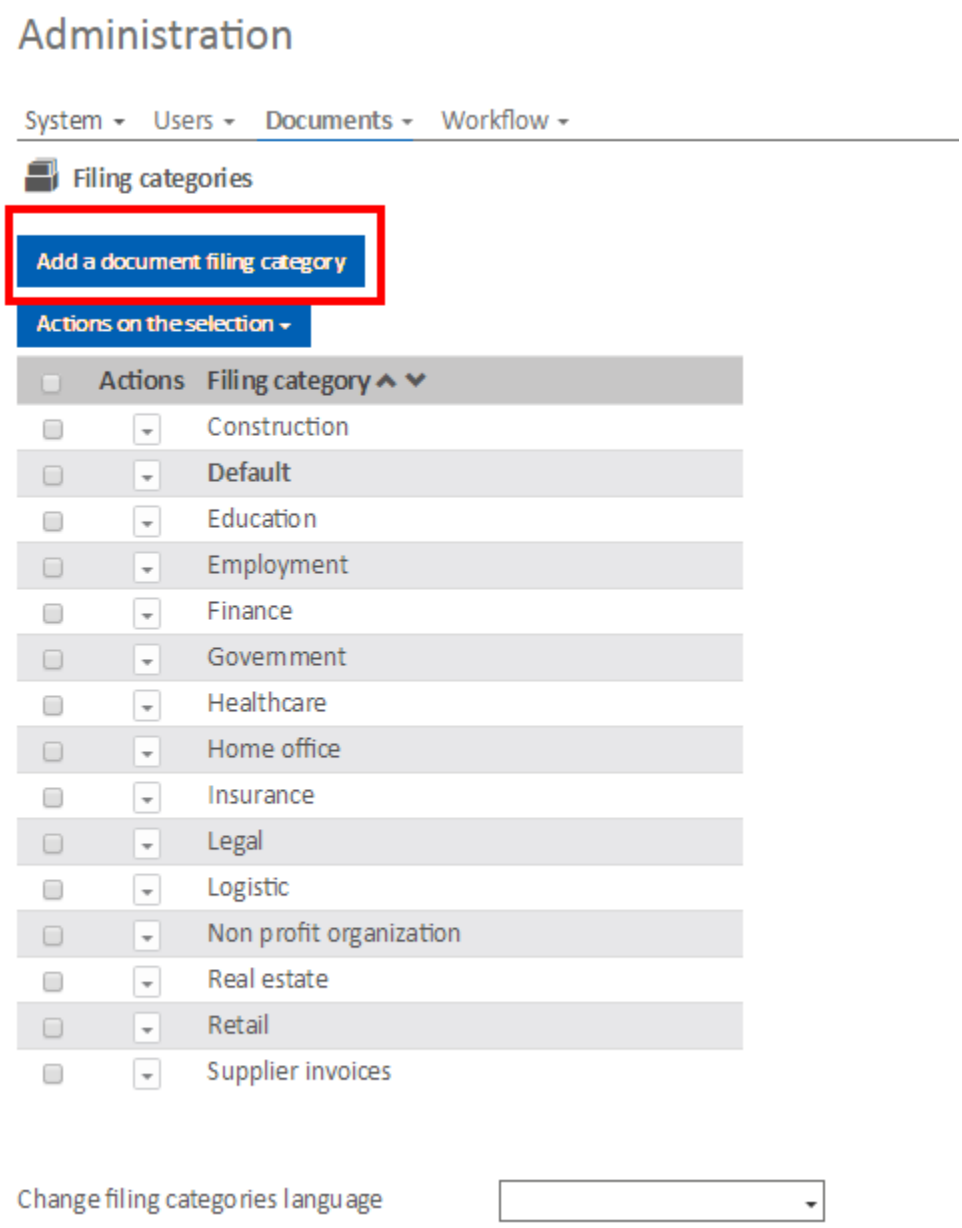
Using metadata that have been entered when filing a document, KOMI Doc will :

- Automatically rename the document
- Dynamically classify the document in a tree of folders and sub folders automatically created
- Store the metadata in a database in order to later find the document.

Create a filing category

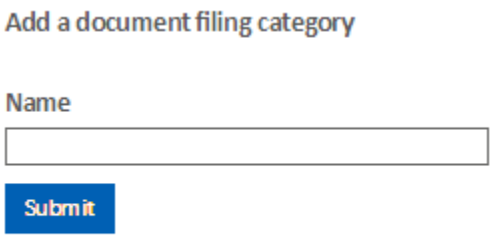
There are default filing categories. You can adjust them depending on your needs (editing the indexing metadata and the corresponding filing categories). See the "**Editing a filing category"** section.

Click on "**Administration**" \ "**Filing categories**"



It is possible to change the filing category language and its associated metadata by using the **"Change filing categories language"** function. This function is located at the bottom left of the filing category administration screen shown above.

Click on "**Add a document filing category**", type a name.



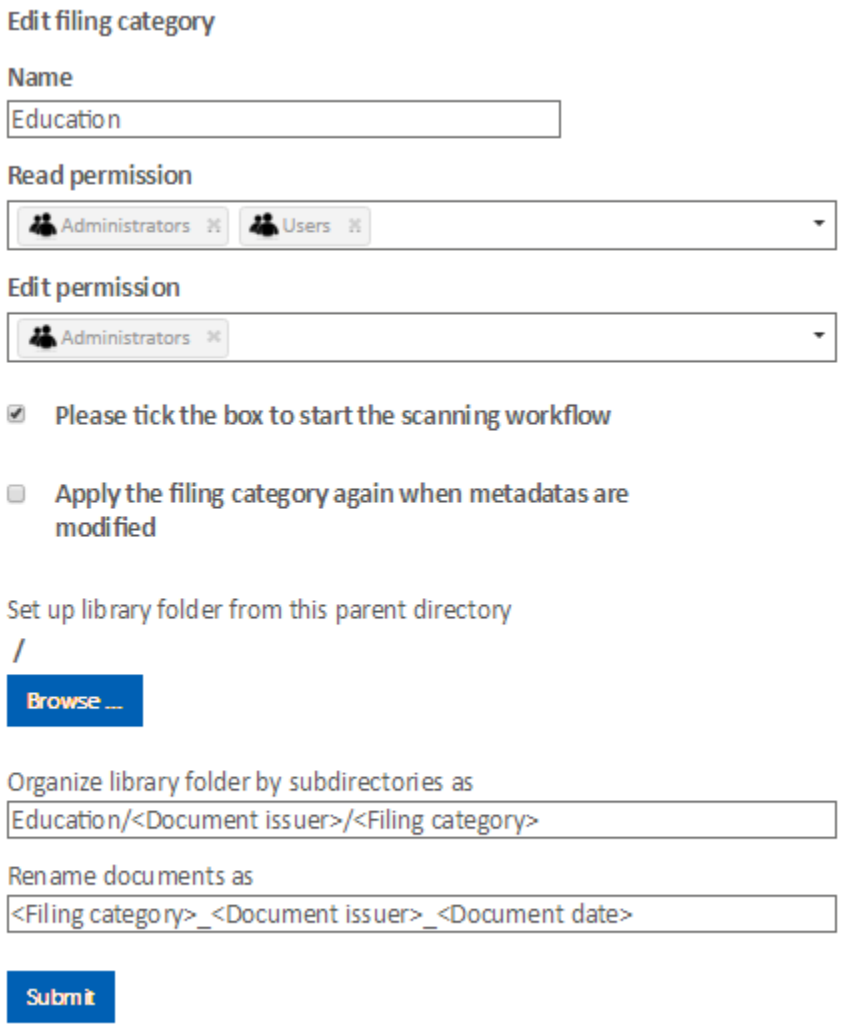
Create metadata

Dynamic directory

Click on **"Administration" \ "Filing categories"**.

Select the filing category to be modified.

- Permission
- Dynamic filing directory and automatic renaming



Permission

Select the groups or users authorized to use this filing category.

Dynamic filing directory and automatic renaming

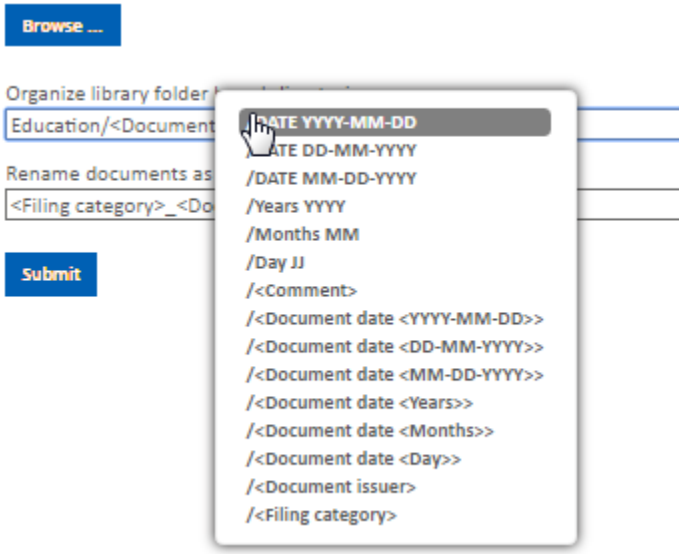
Check **"Please tick the box to start the scanning workflow"**.

Click "**Browse**" to select the filing root folder.

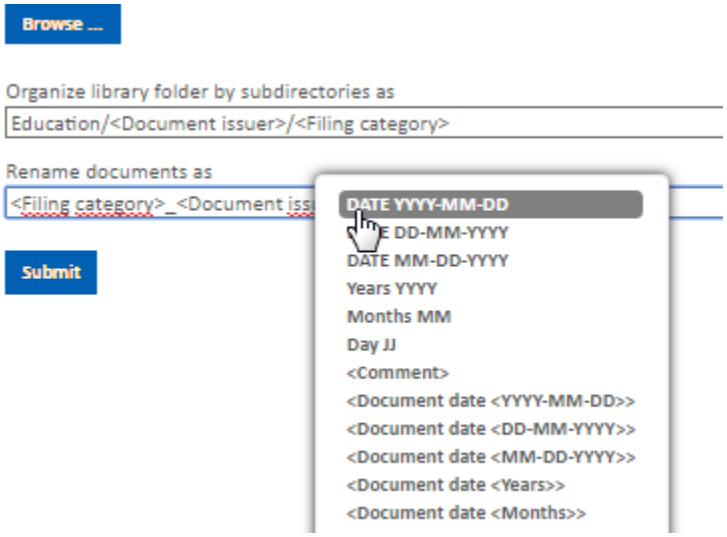
Select the filing folder and click **"Submit"**.

By clicking in the renaming and archiving text zones, available metadata will appear.

Then build the dynamic classification tree and the documents renaming by using these metadata.



Select the document renaming filing rule



Dates

Two types of dates are available :

- the "system" date, characterized by the keyword "**DATE<...>**"
- a date type metadata characterized by the metadata name which is surrounded by chevrons. Example : "**<date de reception<...>>**"

In both cases, the part between chevrons **"<...>"** allows to define the date format which will be used in the dynamic directory creation.

All formats supported by PHP are accepted : http://php.net/manual/fr/function.date.php

Example : a file classified on **15/05/2015** and containing a metadata "**reception date**" whose value is on **04/04/2015.**

systemDate<Y>	2015
<reception date<Y_m_d>>	2015_04_04
<reception date<Y_n_j>>	2015_4_4
reception date<Ym>>	201504
systemDate<d-m-Y>	15-05-2015

Edit or delete a filing category

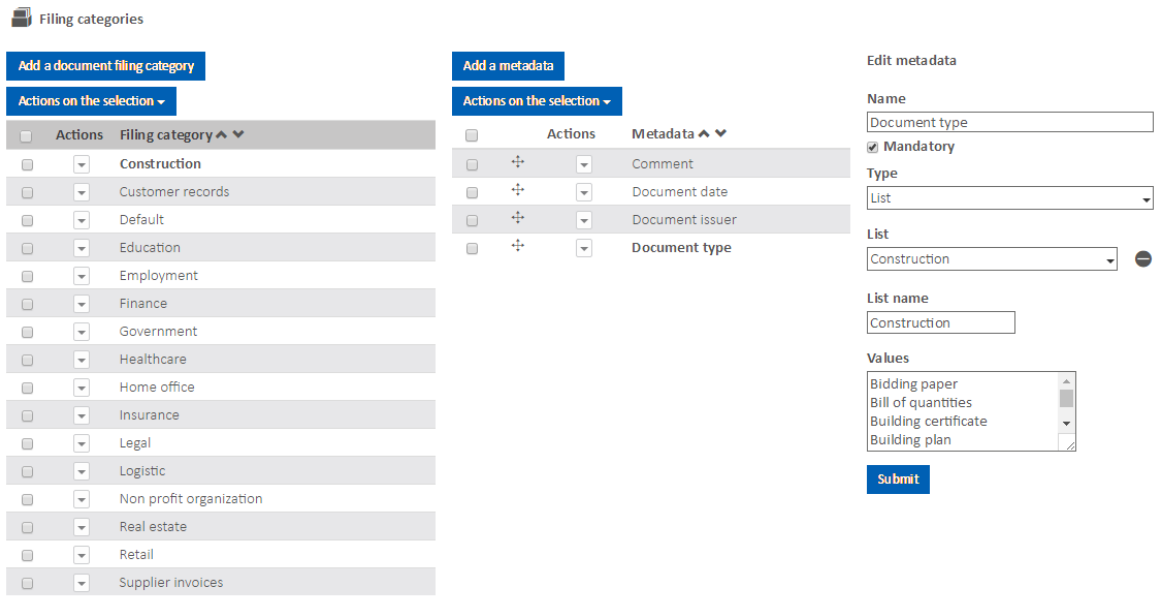
Click on "**Administration**"\"**Filing categories**".

- Edition
- Deletion

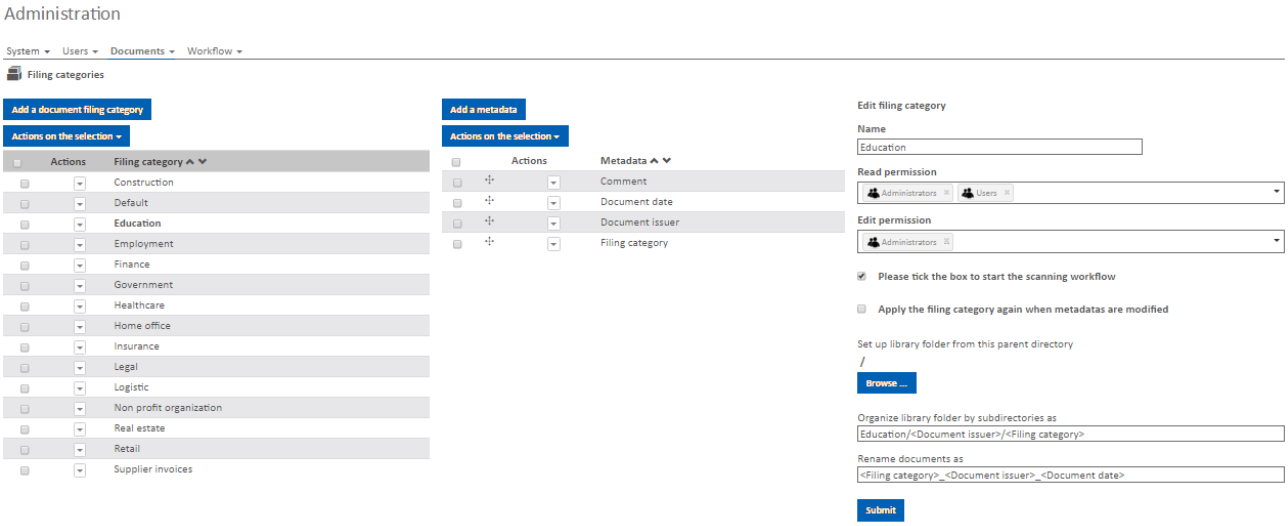
Edition

- Select the filing category (the title can be changed)
- Modify its metadata (1)
- Select again the filing rule
- Modify the dynamic classification tree and access authorizations of the filing category (2).

1) Metadata edition



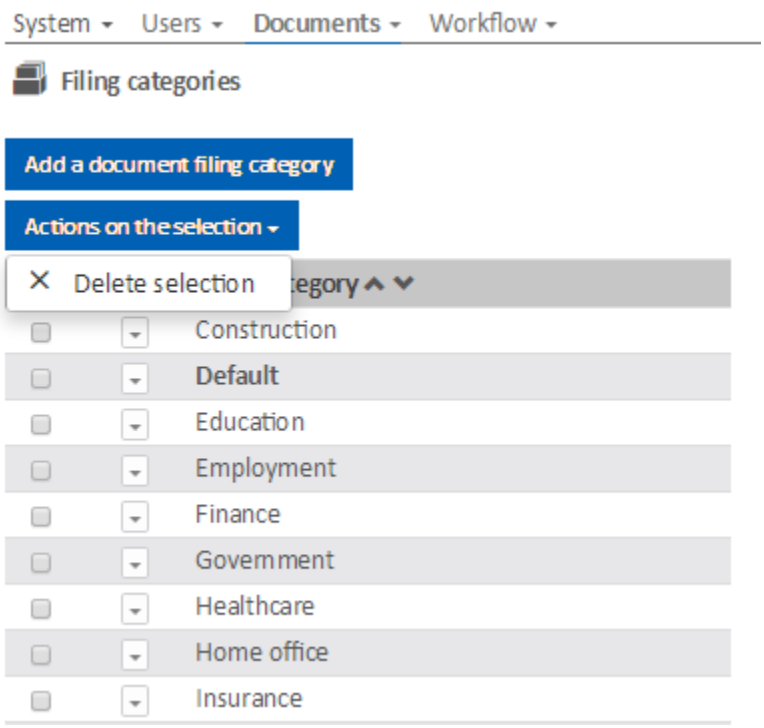
2) Filing category edition



Deletion

To delete one or several filing categories :

- Check the filing category to be modified
- Click on the "**Delete selection**" menu



A confirmation message for deletion appears.

Click "**Submit**"

All the subsequent metadata will be automatically deleted in cascade.

Lists

Lists linked to KOMI Doc metadata can be managed directly from the filing categories administration.

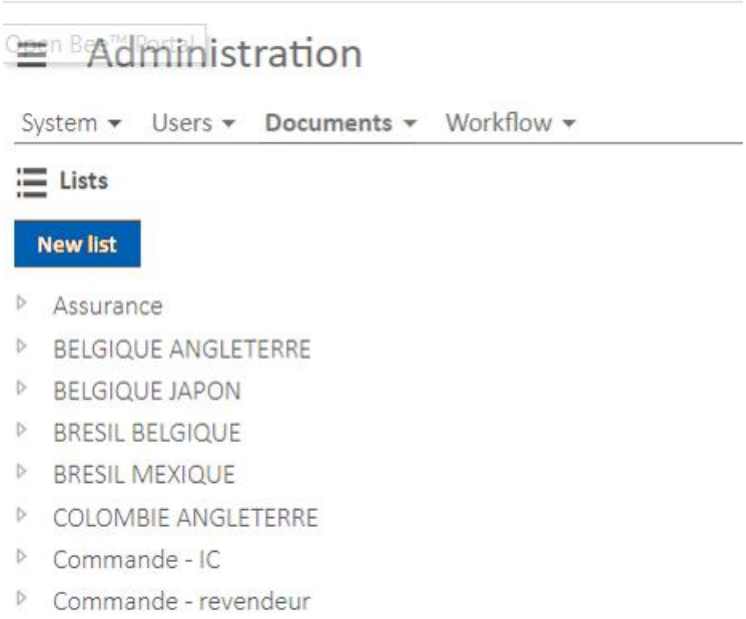
Another way to manage those lists is available in "**Administration**" \ "**Lists**".

This section enables to define sublists that can then be used in metadata filing.

- Simple lists
- Sublists

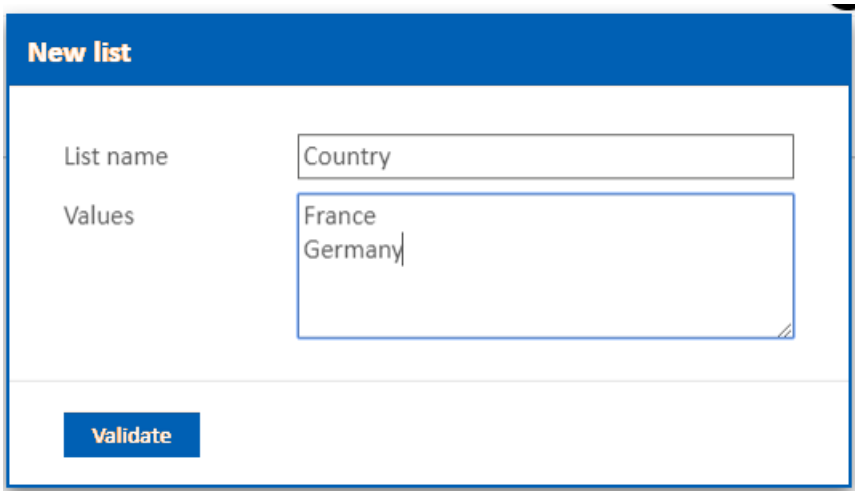
Simple lists

The right part of the screen displays all available lists.



To view a list or edit it, click on its name.

To add a new list, click on the "New list" button. Enter the name of the list and its values (one per line)



Once created, the list is displayed at the section center.

Different actions are available in the selected list :

1. The pen to rename the list
2. The selectbox and "Actions on the selection" button enable to delete several elements from the list
3. The "Add value" button enables to enter a new value to add to the list

4. The "Bulk Edition" button enables to edit all the list value in the same text field (one value per line)
5. The "Delete" button enables to delete the list and its values
6. The context menu linked to the list values enables to : edit this value, delete it and link it to a sublist

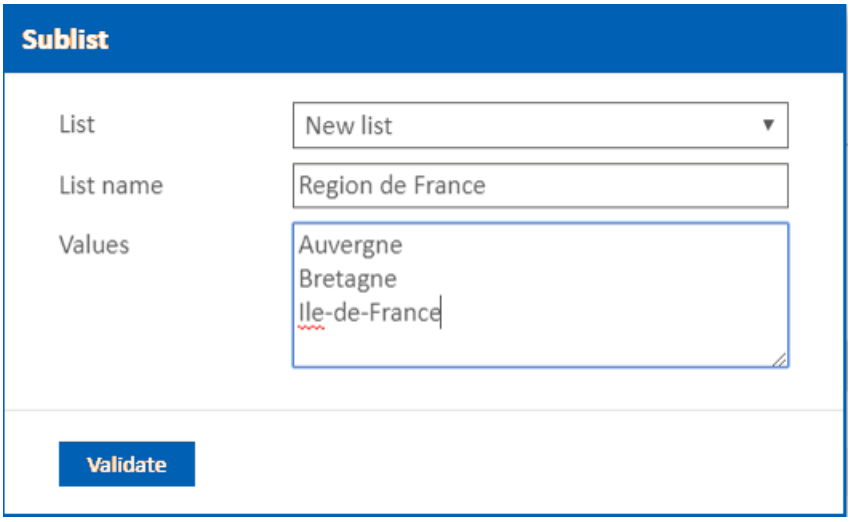
It is possible to import lists from external database Consulter le guide pratique sur ce sujet pour plus de détails.

Sublists

Before creating and editing sublists, it is important to know that :

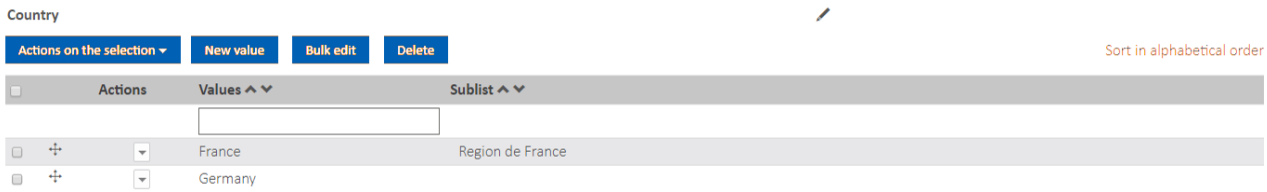
- A list is defined by a name and composed of different values (ex : a list named country contains the values France and Germany)
- A sublist is a list linked to one and only value from another list (ex : the list named Ile-de-France is linked to the value Region de France in the Region list)

To create a sublist, use the context menu on a list value and select the sublist entry. A window enables you to define a new list and to select an existing list that will be linked to the value of the parent list.



Once valided, the sublist can be viewed :

1. In the list tree, as a sublist of the parent list
2. In the lists tree as a simple list (a sublist remains a list)
3. In the list details, linked to its parent value

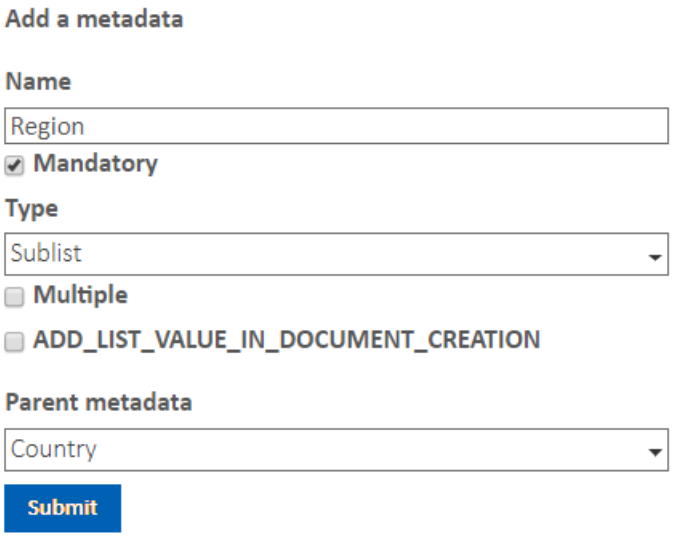


A sublist can only be linked to one parent list.

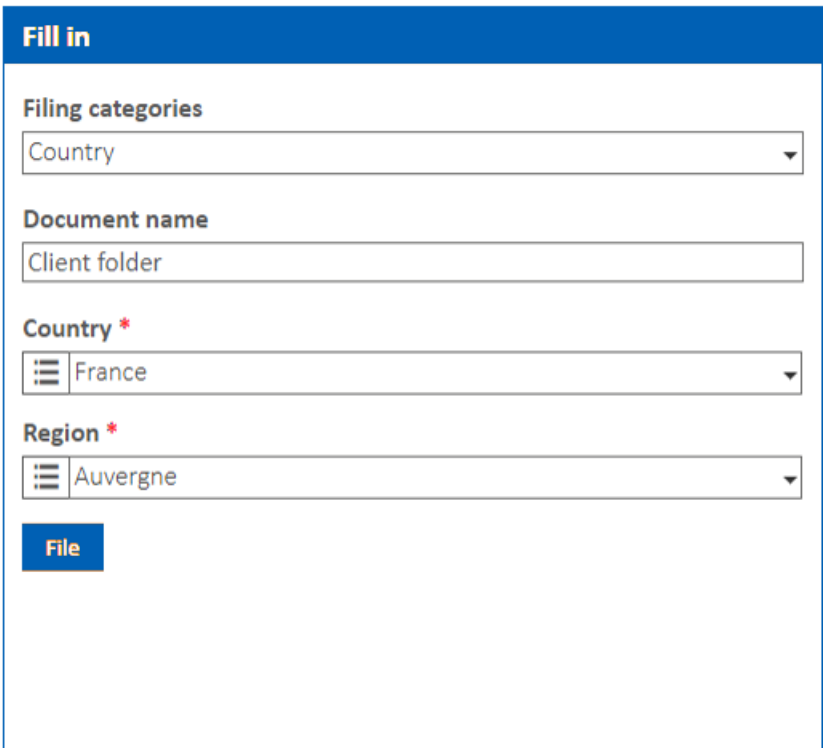
Once the sublists are defined, you need to define the metadata that will use them.

In the "**Administration / Filing categories**" section :

- Create a list type metadata with the parent list (Country for instance)
- Create a sublist type metadata and select as parent metadata "Country"



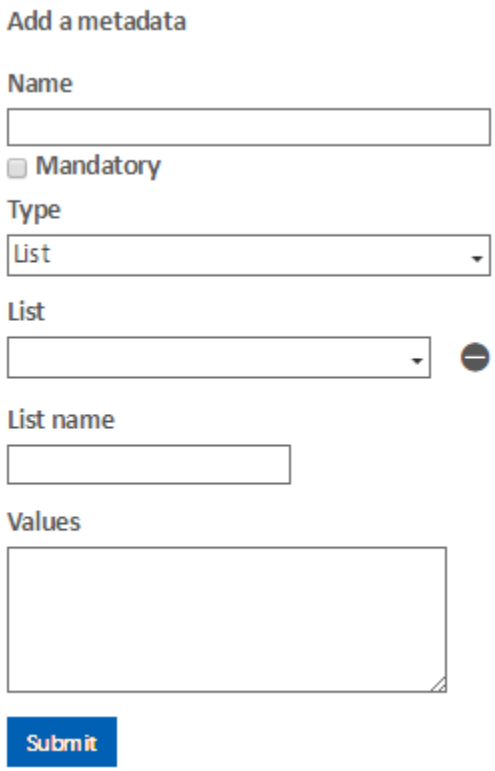
This link between the parent metadata will enable the system to propose the sublist "France regions" for the "Region" metadata when the user selects "France" in the "Country" metadata.



Create metadata

In order to create metadata:

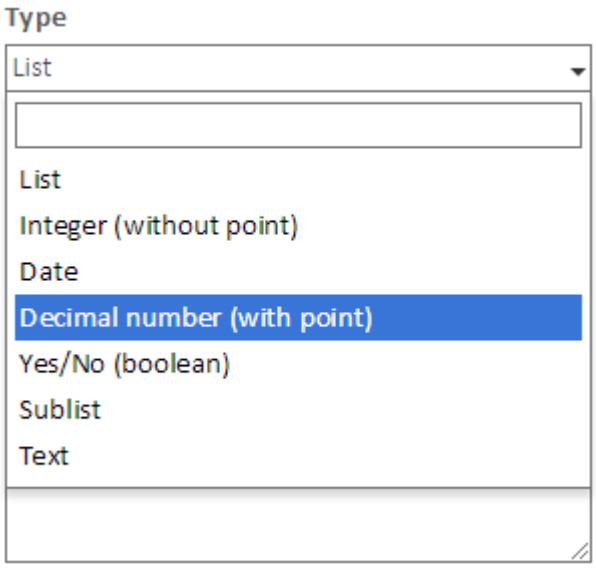
- Click on the "**Administration**" \ "**Filing categories**" tab
- Select the filing category
- Click on "**Add a metadata"**



Enter a name for the metadata to be created

Check the "**Mandatory"** box to make this index as mandatory, in order to force users fill this field in. If left unchecked, the index can then be left blank when filing documents.

Choose the type of metadata from the following drop-down list :



If **"List"** is selected as metadata type, choose :

- Either an existing list from the menu
- Or create a new list and add values to it

It is possible to import lists from external databases. Consult the practical guide on this subject for more details.

The checkbox **" Multiple"** allows you to enter several values in the same metadata.

For example, a **"Delivery form"** metadata will be able to store multiple delivery note numbers if the **"Multiple"** checkbox is checked.

Repeat this operation as often as needed.

You can then modify your filing category to define the associated dynamic tree structure.

Digital Safe Box

The KOMI Doc permissions' system on folders is configured to allow members of the **"Administrators"** group to visualize all files and documents.

This behavior is sometimes problematic, for example when archiving sensitive documents (for example : pay slips) that the administrator should not be able to see.

The Digital Safe Box concept was built to address this problem. A **"Digital Safe Box"** is a folder that is not accessible by the **"Administrators"** group. Besides, a **"Digital Safe Box"** is a main component for the use of KOMI Doc such as defined in the NF LOGICIEL - CCFN norm (dans le cadre de la norme NF LOGICIEL - CCFN.)

- Create a Digital Safe Box
- Check the "Digital Safe Box" Integrity
- src-266339225_DigitalSafeBox-
- Consult the transactions/logs of a "Digital Safe Box"

Create a Digital Safe Box

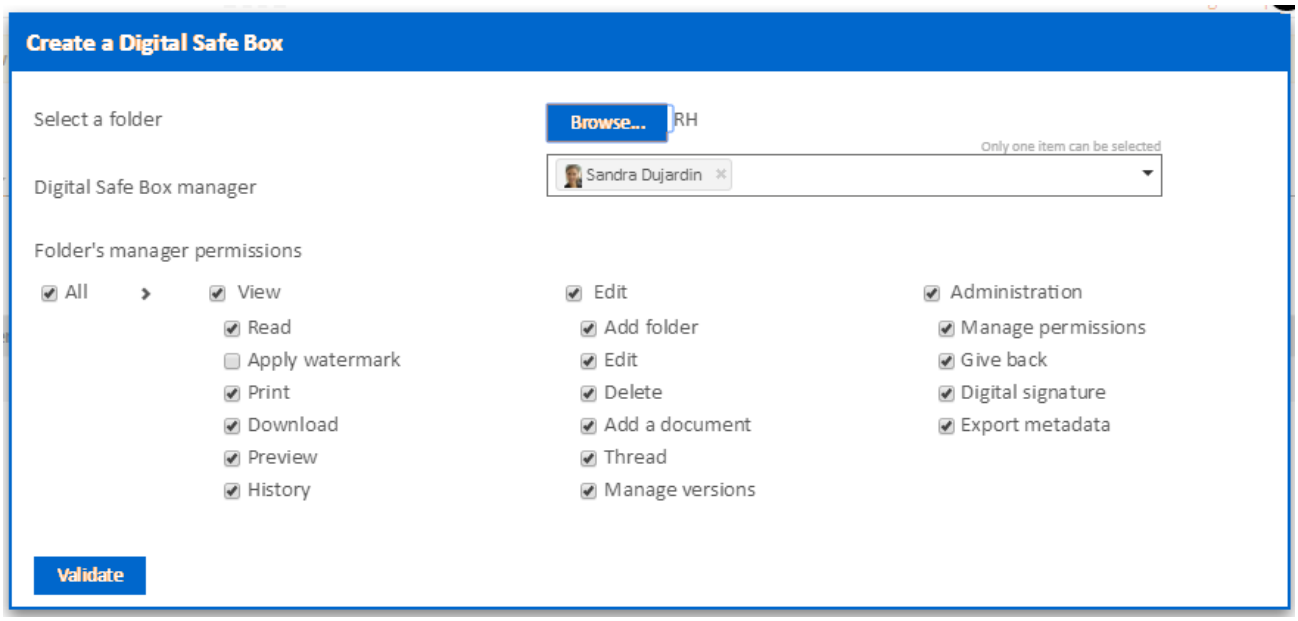
Prerequisites :

- A user account with the role of **"Functional Administrator"**
- A user who will become the manager of the **" Digital Safe Box "**
- Your KOMI Doc license includes the **" Digital Safe Box "** option **.**

A " **Digital Safe Box "** requires that only its manager (and potential guest(s)) can access its content. This behavior is provided by the *KOMI Doc Digital Safe Box concep*t.

Sign in with a **" Functional Administrator "** account .

1. From the **"Administration \ Digital Safe Box"** section, click on **"Add a Digital Safe Box"**
2. Select the **"Digital Safe Box"** manager (the **"Digital Safe Box"** owner)
3. Select the folder that will be transformed into a **" Digital Safe Box "** . It is possible to create this folder at this stage if it does not exist yet .
   In the screen below, we chose the folder **"RH"** at the root of the tree.
4. Define the permissions that the manager will have on the **" Digital Safe Box "** .



Once this operation is done, the manager of the " Digital Safe Box " becomes the only user who can access the folder.

Once created, a **"Digital Safe Box"** can neither be modified, nor be deleted by a **"Functional administrator"**. This limitation, which may appear as a functional lack, is in fact the absolute guarantee that the solution administrators cannot consult the **"Digital Safe Box"** content.

The manager's permissions can therefore only be modified by the manager himself, provided he has the necessary permissions to do so.

If you do not grant the user the necessary permissions when creating the **" Digital Safe Box "** , make sure that this configuration will not cause problems because it is **irreversible .**

Creating the **" Digital Safe Box "** also has the effect of automatically activating:

- Encryption of documents stored in the **" Digital Safe Box "** , even if this option is not enabled in the general configuration of KOMI Doc
- A second factor of authentication by email during the authentication of the manager of the **" Digital Safe Box "** .

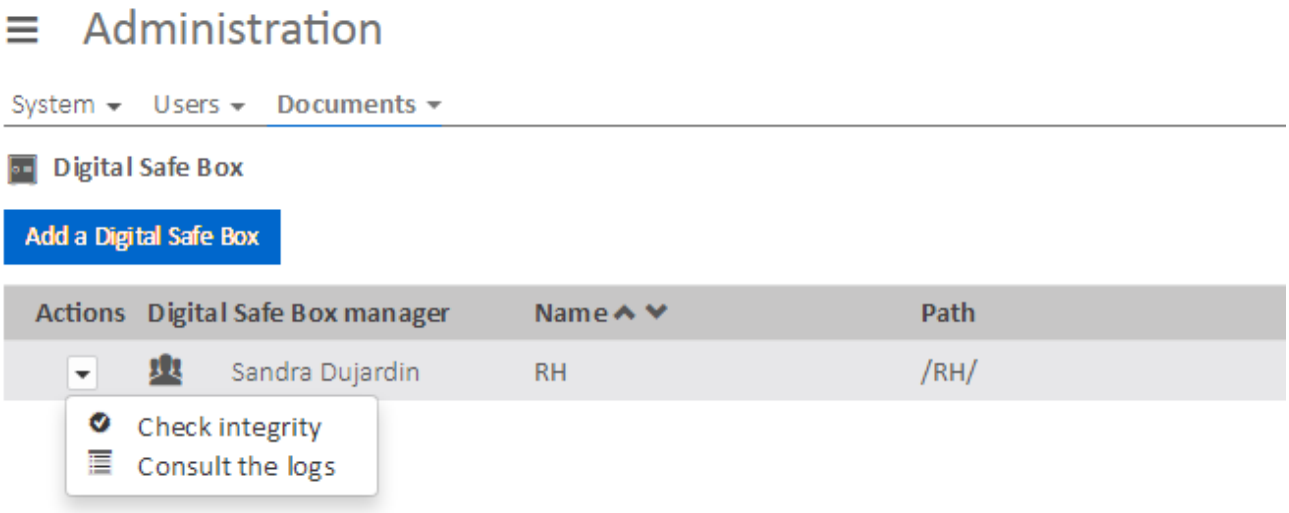
- Prevent administrators from changing/modifying the user manager password.

Check the "Digital Safe Box" Integrity

Although he can not consult the documents, a functional administrator has the possibility to check the integrity of the stored documents of/in a **" Digital Safe Box "** .

This function is accessible via the contextual menu associated with each **" Digital Safe Box "** in the section **"Administration \ Digital Safe Box"**.

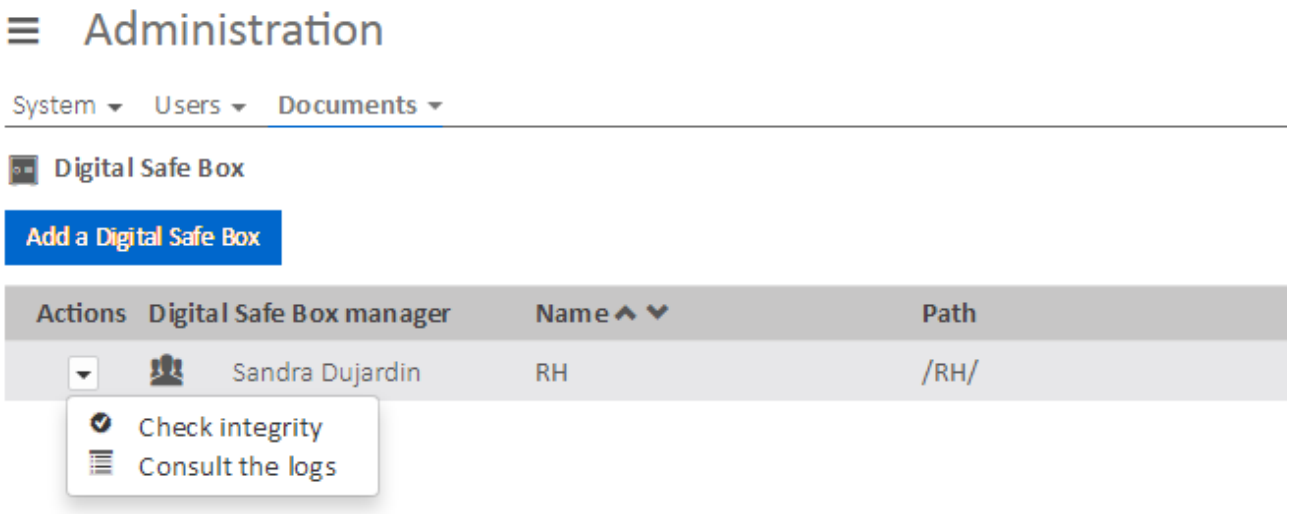
The operation carried out is identical to that performed by a manager of a **" Digital Safe Box "** , especially for the result that will appear in notifications.



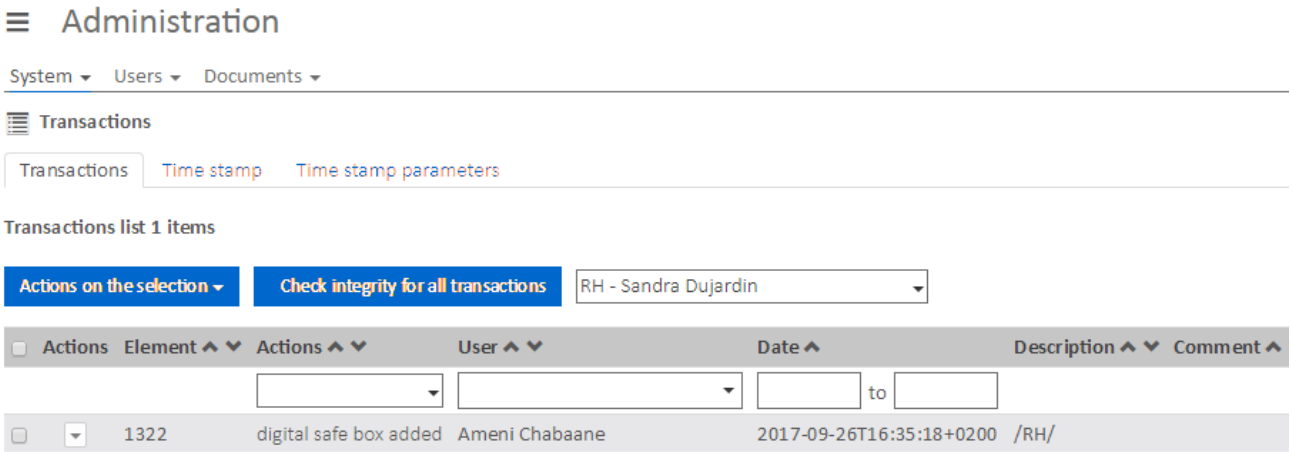
Consult the transactions/logs of a "Digital Safe Box"

A functional administrator is able to consult the transactions/logs of the operations performed in a Digital Safe Box .

This function is accessible from the contextual menu associated with each Digital Safe Box in the section **"Administration \ Digital Safe Box"**.



The same result can be obtained by navigating to the section "**Administration \ Transactions**" and selecting a **"Digital Safe Box"** using the filter at the top of the table .



Dynamic Links

This administration section allows to configure the manner in which KOMI Doc suggests documents to be linked with one another.

In order to manage dynamic links, click on "**Administration**" \ "**Links**".

The selection algorithm is based on relations between documents' metadata . The configuration consists in linking the metadata of two filing categories between them.

Example: Let's figure that you want to link your invoices to the corresponding orders.

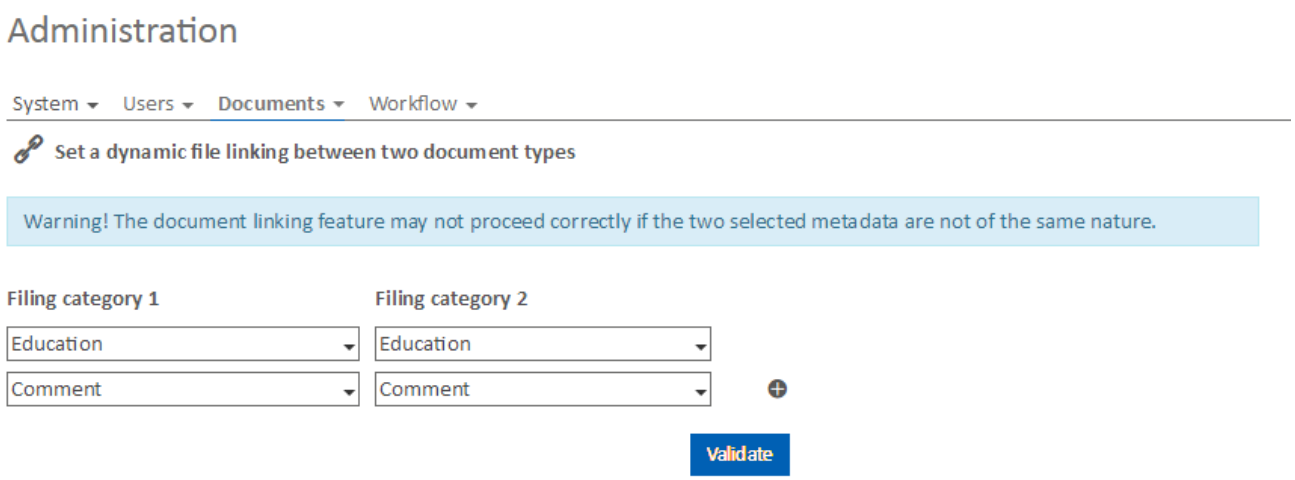
There are two filing rules called **"Invoices"** and **"Orders"** with the following metadata :

Invoice	Purchase Order
amount	amount
supplier	supplier
date	date

We will configure relations between the metadata :

1. *amount* of invoice and *amount* of purchase order
2. *supplier* of invoice and *supplier* of purchase order

Click the **"Add a link**" button to add a relation between the two filing categories/rules .



The "Automatically link documents that satisfy these criteria" checkbox allows to automatically link documents without manual operation. If it is not checked, the link will only be suggested and a user will have to validate it manually.

The "AND / OR" operator allows to determine the behavior if multiple metadata are used. In this example, it will be necessary for the metadata "Amount" AND the metadata "Supplier" to be identical for the documents to be linked.

The "OR" is typically used when the link is not automatic to provide as many suggestions as possible to the user. The "AND" is to be preferred in case of automatic links.

Once this configuration has been setup, if a user wants to file/archive a 1000 € invoice from Konica Minolta and if a purchase order of 1000 € from the company Konica Minolta is available, documents will be automatically linked .

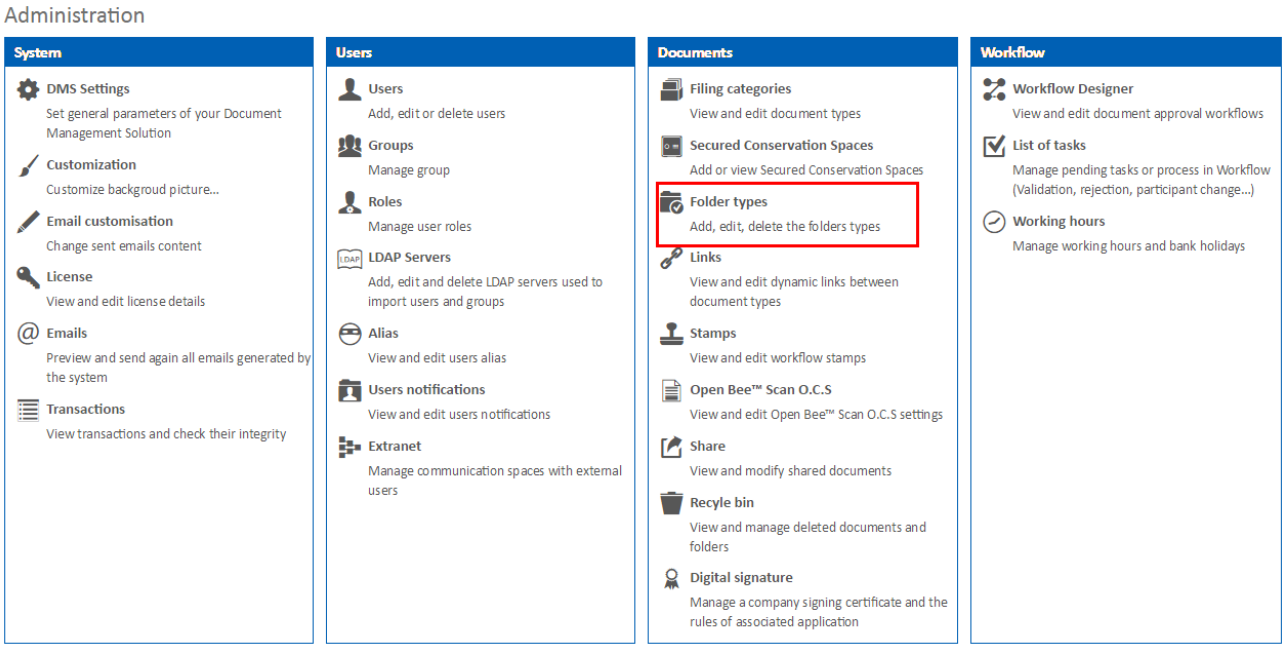
In the Link screen, by default, five suggestions per page are displayed. This parameter can be modified from the "/ administration / config" screen.
Change the "docBySearchPage" parameter and save.

Folder types

"**Folder types**" is a function allowing to define the expected content in a folder so that it is considered as "complete".

The administrator defines the folder types which will be applicable to folders by users.

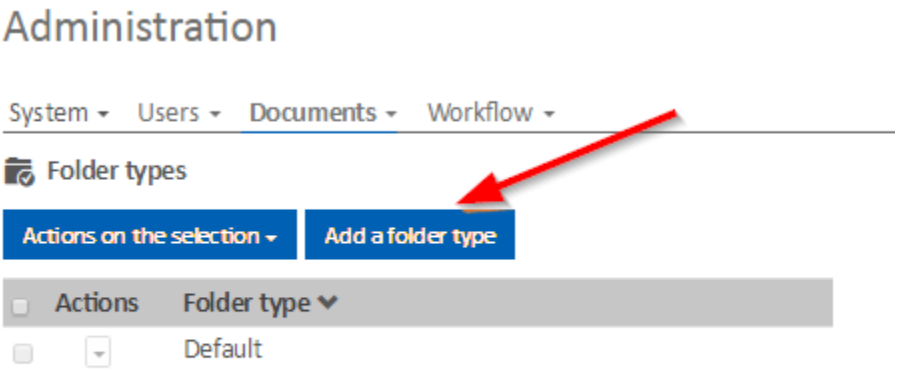
In order to manage the folder types, click on "**Administration**" \ "**Folder types**".



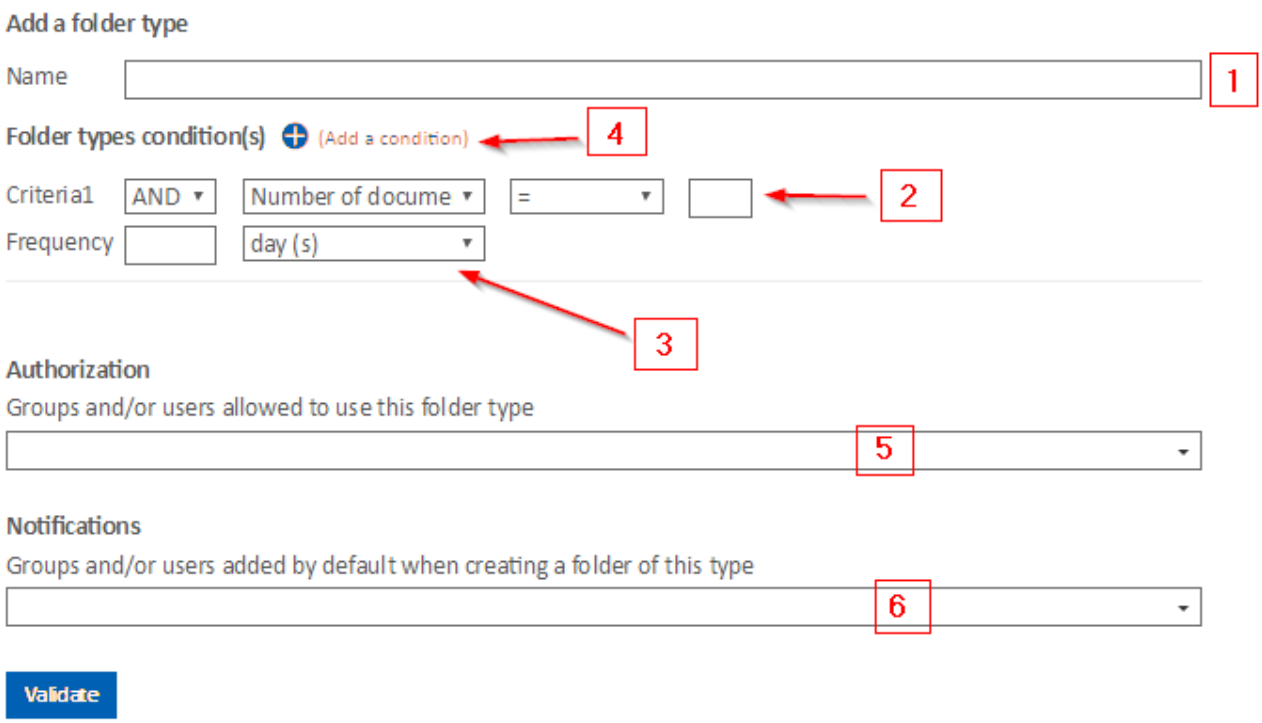
- Add a folder type
- Modify a folder type
- Delete a folder type

Add a folder type

Click on "**Add a folder type**"



The creation form appears on the right side of the screen :



1) **Add a folder type**: Enter the folder type's name

2) **Condition**: Choose a condition

Example: The folder must contain at least 3 documents to be considered as complete.

There are different types of conditions:

- Number of documents in the folder
- Number of document versions in the folder
- Number of documents classified with a specific folder type
- Metadata value of a file document
- Sum of the metadata values of all the files in the folder

3/ **Recurrence**: allows to make a condition recurrent.

Example: 3 new documents are expected every year in the file.

4/ **Add a condition**: Allows to apply additional conditions : it is possible to mix several conditions to obtain complex completion criteria.

5/ **Authorization**: Choose the groups and/or users authorized to use the folder type

6/ **Notifications**: Choose the groups who will be notified by default, during the creation of a folder associated to this folder type. The data will be editable by the user who created the folder.

Modify a folder type

Click on the folder type in the list, the same form as the creation form appears.

Changing the completion rule is retroactive and applies to all folders already created with this rule.

Delete a folder type

Check the box(es) to be deleted in front of the folder type.

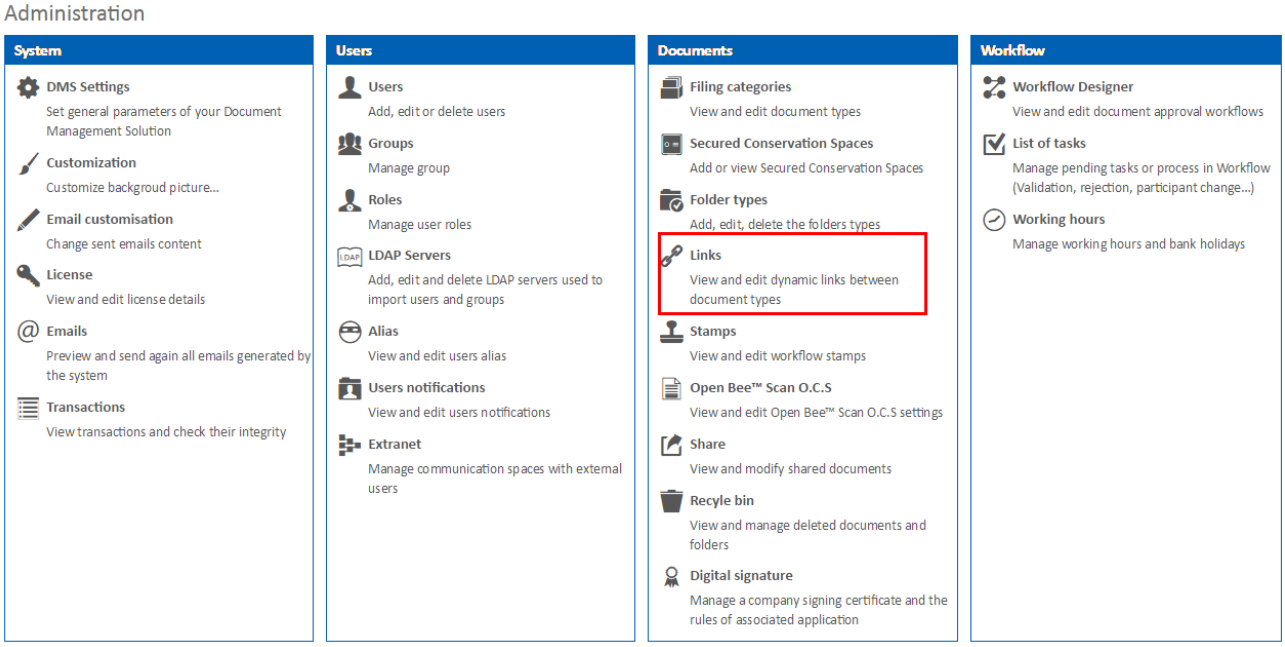
Choose "**Delete selection**" in the menu.

During a folder type deletion, previously created folders with this folder type become standard folders.

Links

This administration section allows to configure the manner in which KOMI Doc suggests documents to be linked with one another.

In order to manage the links, click on "**Administration**" \ "**Links**".



The selection algorithm is based on relations between document metadata. The configuration consists in linking the metadata of two filing categories between them.

Example: Let's imagine that you want to link your invoices to the corresponding orders.

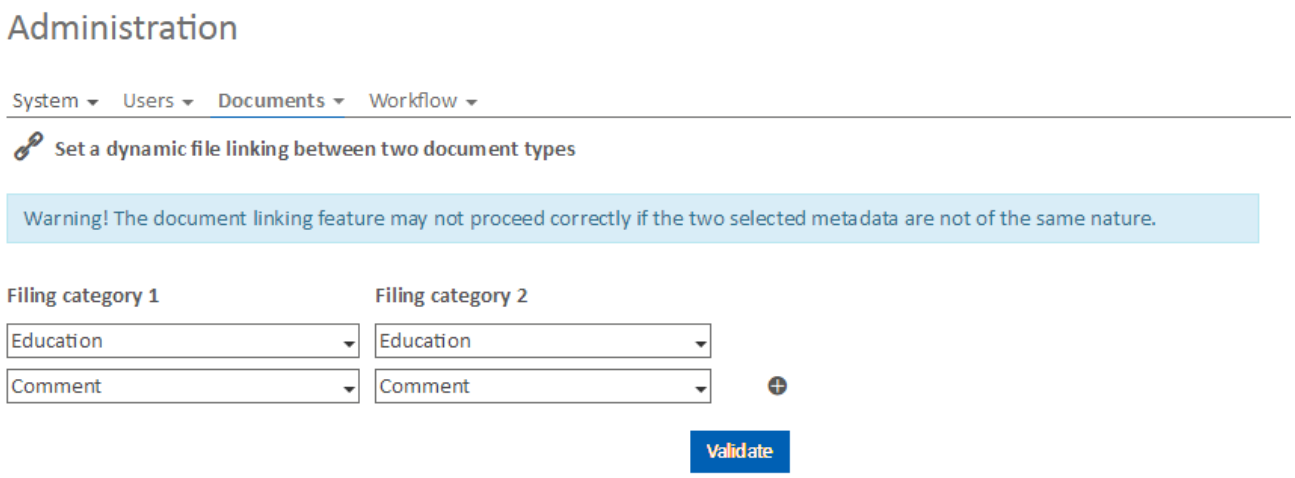
There are two document types called **"Invoices"** and **"Orders"** with the following metadata :

Invoice	Purchase order
amount	amount
supplier	supplier
date	date

We will configure relations between the metadata :

1. *amount* of invoice and *amount* of purshase order
2. *supplier* of invoice and *supplier* of purshase order

Click the **"Add a link**" button to add a relation between the two filing categories :

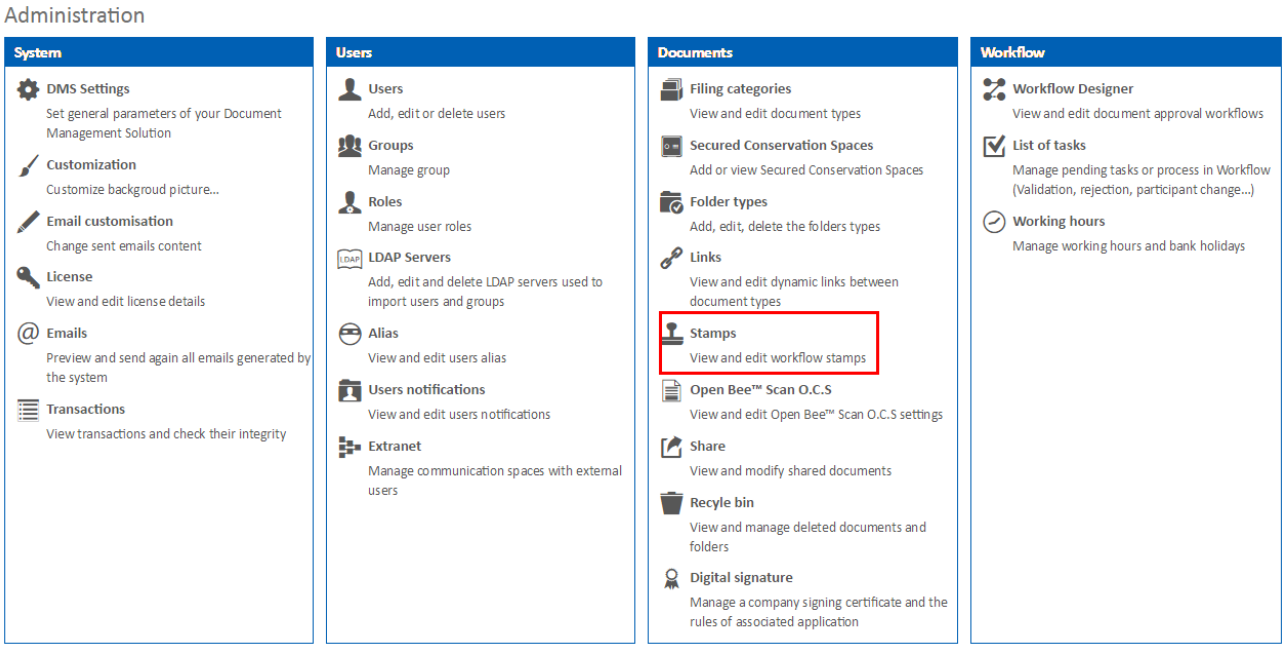


Once this configuration has been setup, if a user wants to link a $100 invoice from Konica Minolta to another document, all the orders from Konica Minolta for $100 will be available from the "Suggested documents" area.

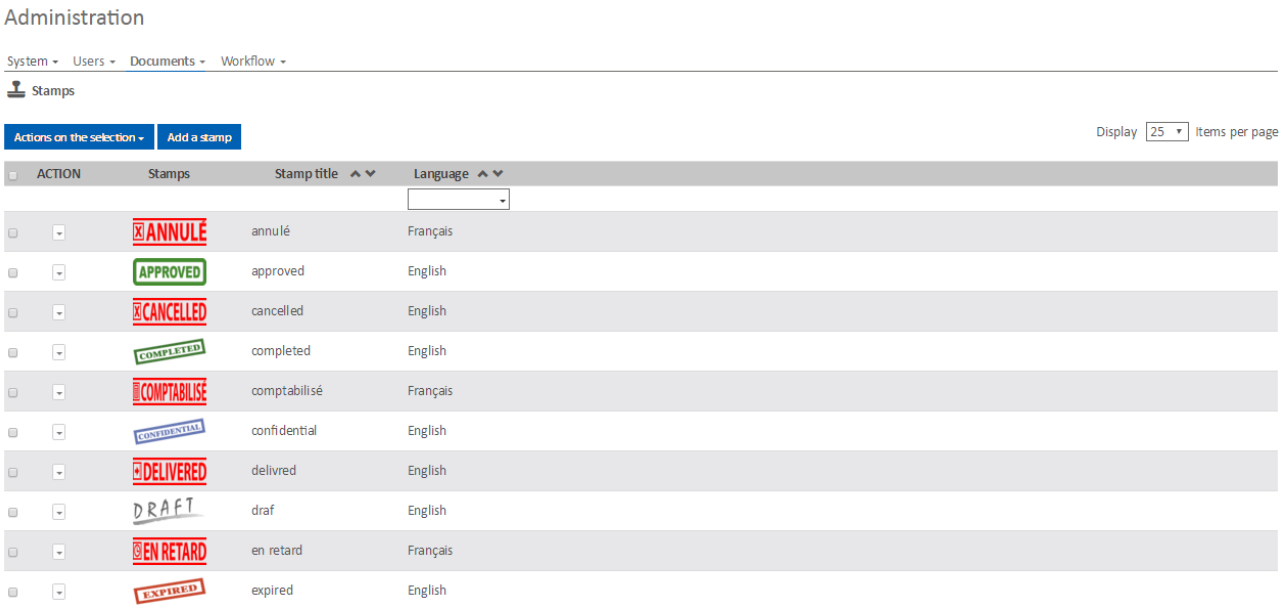
Stamps

This zone contains the stamps list which can be included on documents being processed through the workflow.

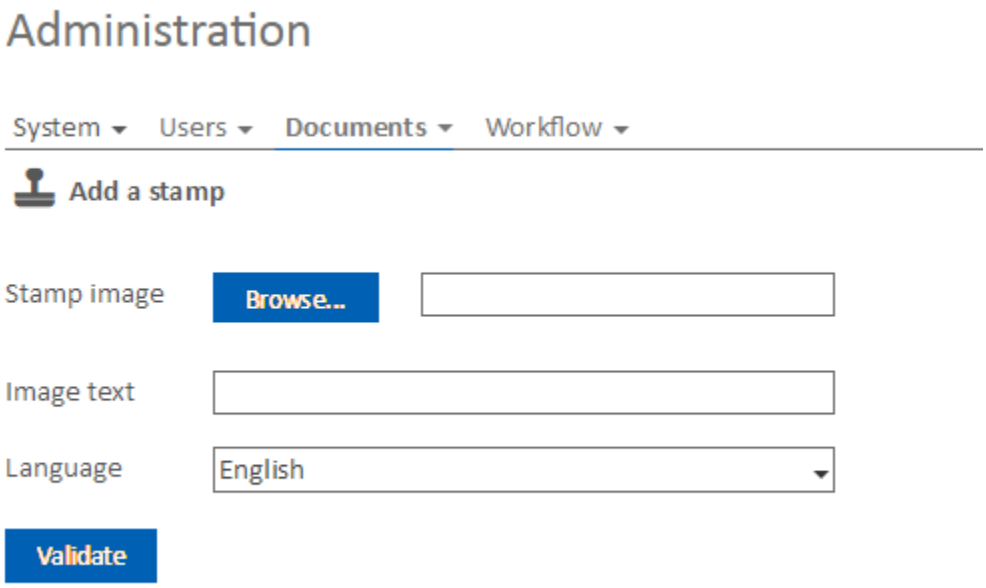
Click on "**Administration**" \ "**Stamps**".



The existing stamps list appears.



You can add a stamp by clicking on "**Add a stamp**" button.



- **Stamp image**: select a PNG image format on your computer.
- **Image text**: type a title for the stamp. It is only used to sort the stamps in alphabetical order when displayed.

- **Language**: select the language in which the stamp will be available. This field allows to offer only stamps in the language of the user.

Note

The image size is not limited. However, for an optimal use, we recommend the use of **a 150 pixels wide image**.

It is also possible to remove a stamp using the action menu on the stamps or the actions on the selection menu.

KOMI Scan O.C.S

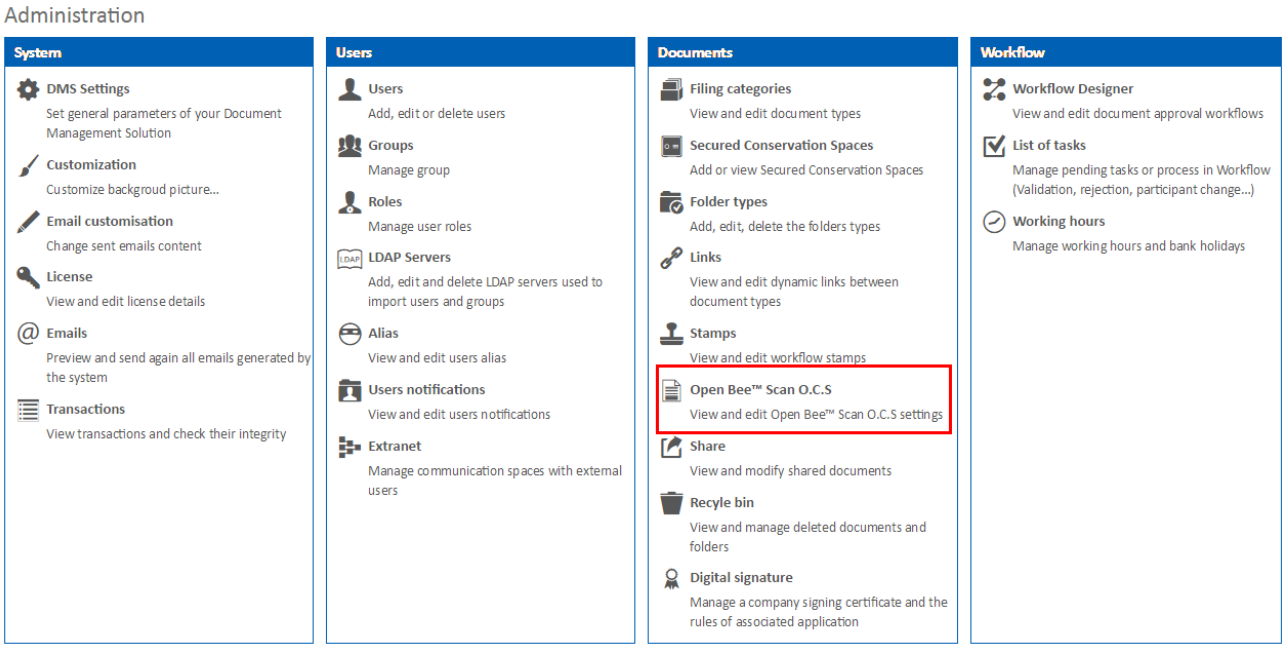
KOMI Scan OCS is a service that extracts the document's textual elements. It is an additional software component of KOMI Doc.

This service allows:

- Text extraction (O.C.R. conversion) of scanned and archived documents in KOMI Doc, as well as their conversion to PDF/A text format.
- Office document conversion in order to allow its preview in KOMI Doc
- Thumbnail creation of archived images in KOMI Doc in order to allow an optimized web display.

An administration section allows to configure and monitor the interactions between KOMI Doc and KOMI Scan OCS.

Click on "**Administration**" \ "**KOMI Scan OCS**".

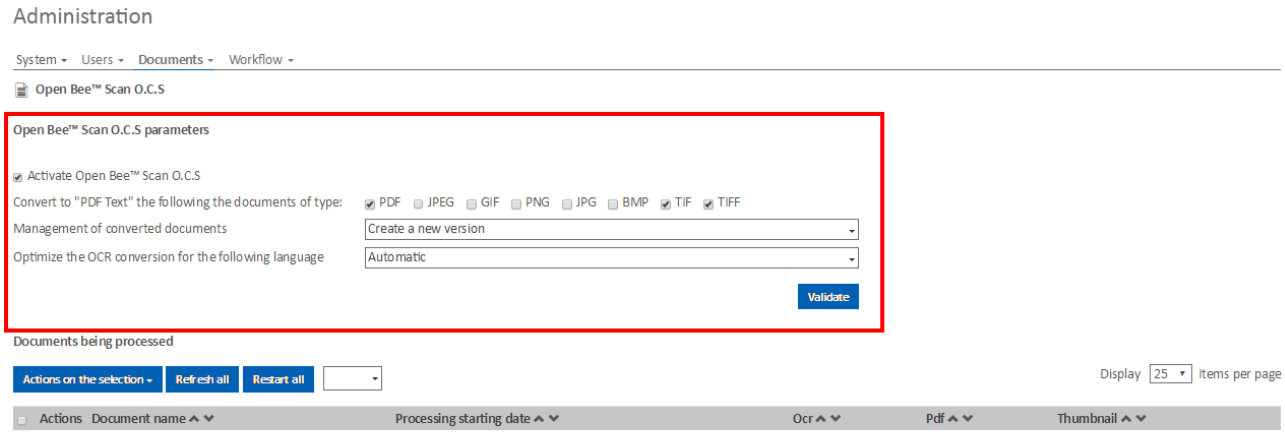


- Functioning
- Communication settings
- Interactions monitoring

Functioning

Archived documents in KOMI Doc requiring a processing by KOMI Scan OCS are automatically transmitted asynchronously to KOMI Scan OCS. The conversion result is also asynchronously and transparently integrated in KOMI Doc.

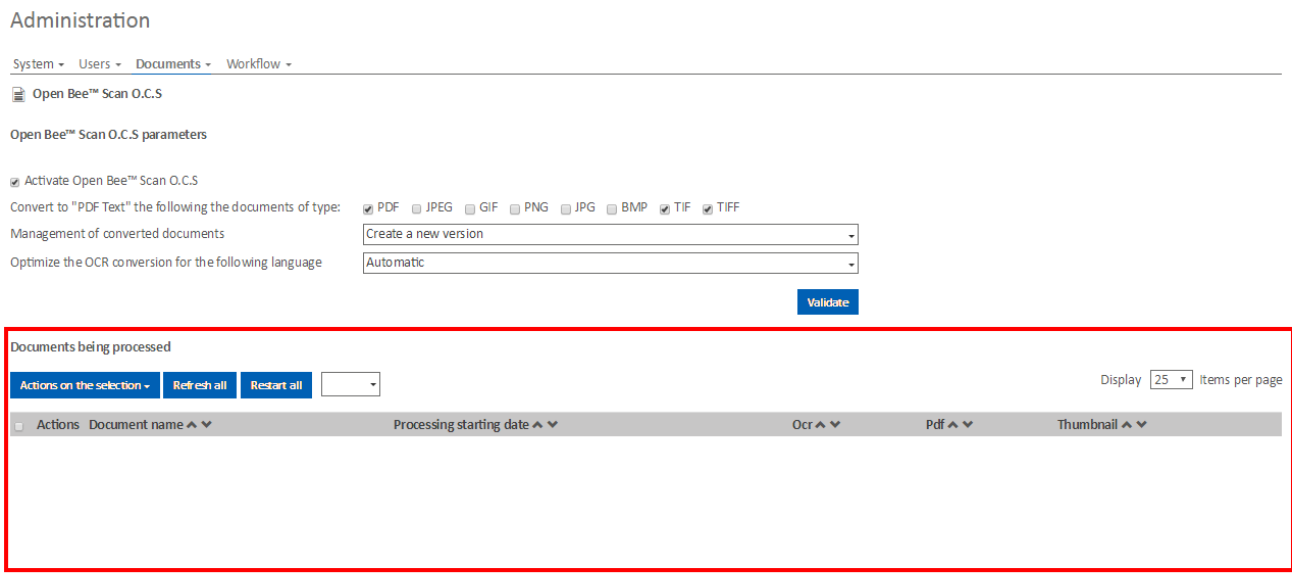
Communication settings



This form allows to :

- Enable the activation (or not) of the O.C.S document conversion.
- Configure the O.C.S service address (it is pre-filled by default. In the "Cloud" installation case, it is not editable).
- Choose the document format (Pdf, Tiff...) on which to apply the (OCR) text extraction and PDF / A conversion
- Choose the reintegration policy for documents converted in PDF/A:
    - Either the original document replacement
    - Or a new document version creation
- Choose the used language. this allows to reduce the conversion time and optimize the results.

Interactions monitoring

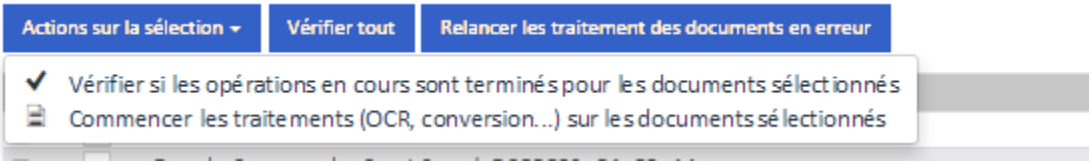


This part allows to view the documents waiting to be converted by OCS.

The table columns are:

- **Document name:** name of the document being converted
- **Version identifier:** the identifier in KOMI Doc
- **Server identifier:** the document identifier in KOMI Doc. If this column is not empty this means that the document is being converted by KOMI Doc
- **OCR:** OCR document conversion status if applicable
- **PDF:** PDF document conversion status if applicable
- **Thumbnail:** Document thumbnail image creation status if applicable

Via the menu, the following operations are possible:



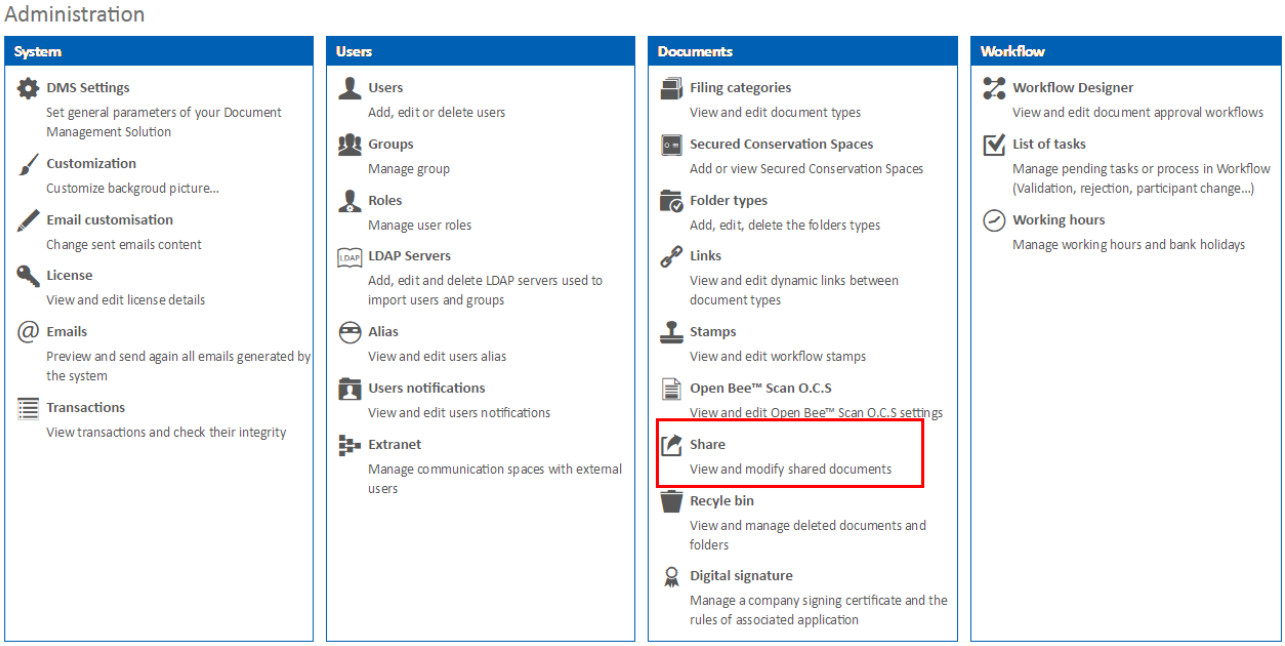
- Check if the documents conversion is finished. This operation is automatic and achieved by the system as a background task.
- Launch the selected document conversion. This operation is automatic and achieved by the system as a background task.
- Restart the conversion of documents in error.

Share

KOMI Doc allows to share documents towards external contacts by sharing a link towards a document (see the dedicated section in the User Guide).

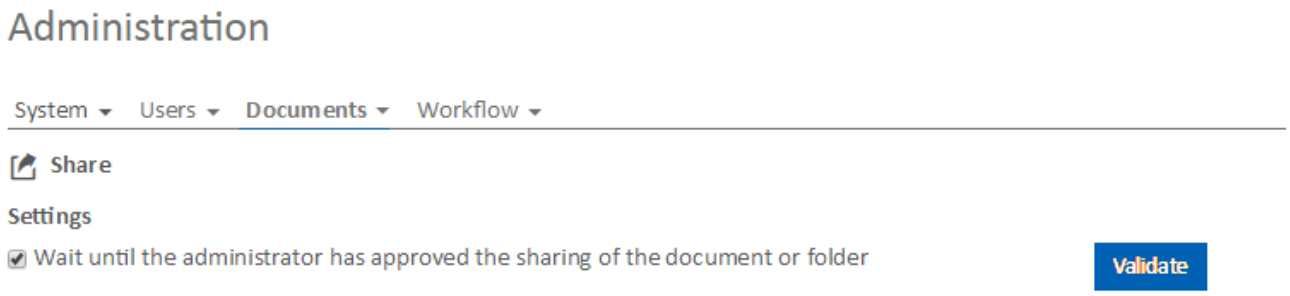
This administration section allows to view the shared documents and set up sharing.

Click on "**Administration**" \ "**Share**"



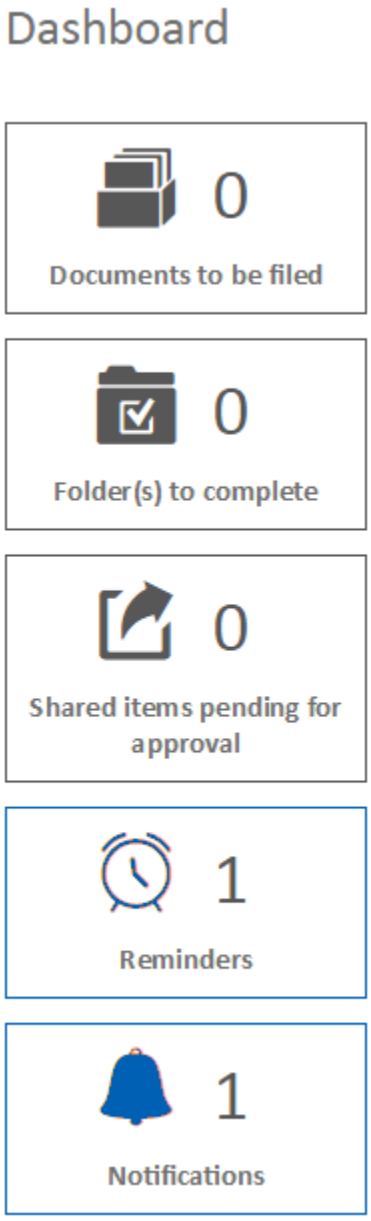
- Approval of shares
- Shared documents / folders list

Approval of shares



"**Wait until the administrator has approved the sharing of the document or folder" :** allows to submit all shared documents and folders in KOMI Doc to an administrator validation.

When documents or folders sharing are waiting for approval, a notification in the administrators' **"Dashboard"** is displayed. They are also informed by email.

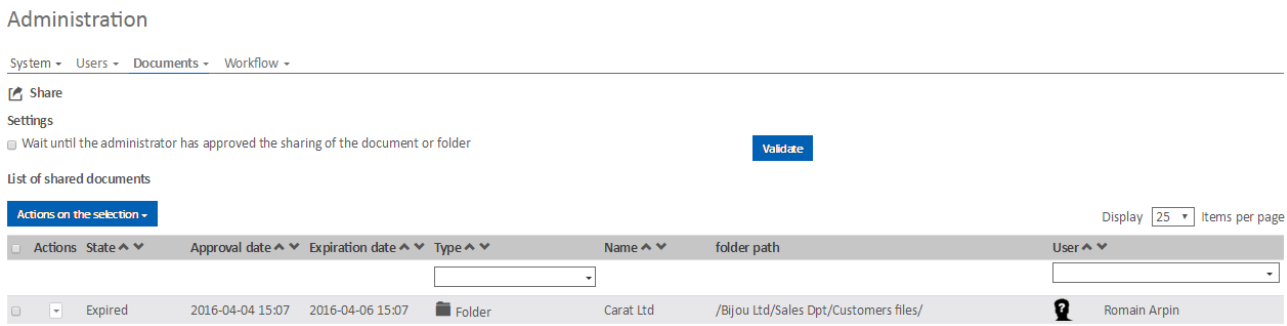


This notification redirects the administrators towards the list of shared documents / folders described below.

Shared documents / folders list

The shared documents / folders list allows administrators:

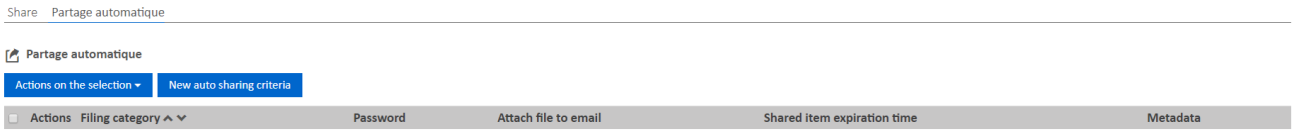
- To approve in batches the shared documents / folders waiting for approval (Actions on the selection)
- To delete shared documents / folders in batch (active or not)
- To modify the sharing details



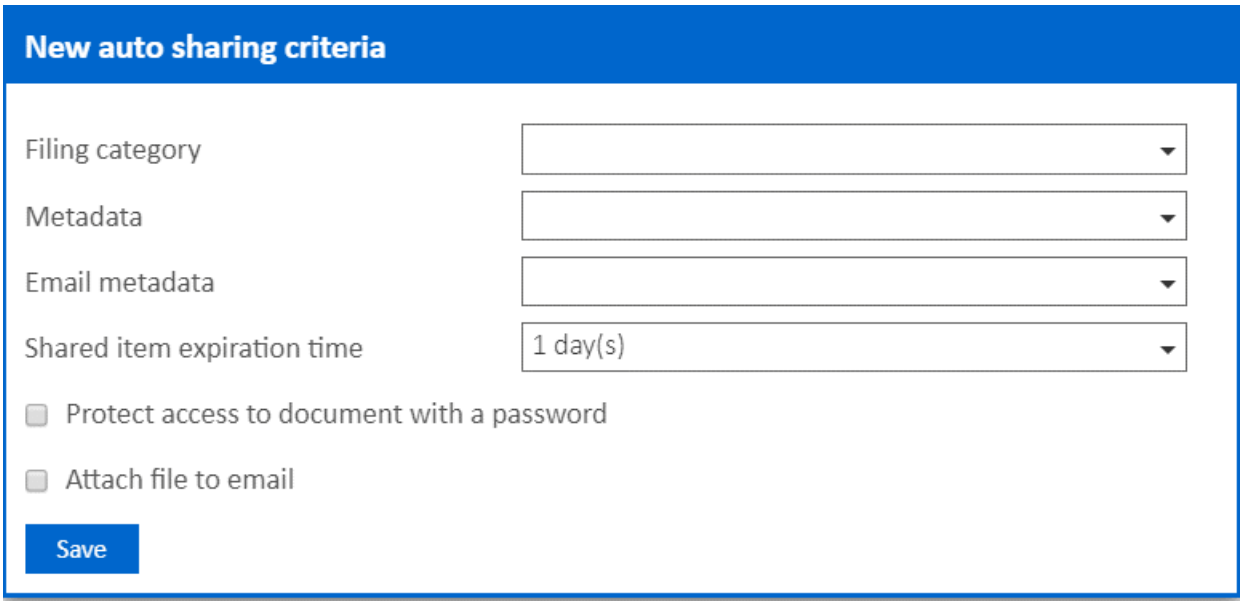
Automatic Sharing

The automatic sharing function triggers document sharing automatically based on metadata values.

To set up automatic sharing, click on "**Administration**" \ "**Share**", then on the tab "**Partage automatique**"(automatic sharing).



Then add a new triggering criterion for automatic sharing by clicking the **"New Auto Sharing criteria "** button



- **Filing rule and metadata** : select the criterion that will trigger the automatic sharing. In the screen above, all documents classified with the **"Education"** filing rule will be shared automatically.
- **Email metadata :** select the metadata which will contain the emails to which the share will be sent.

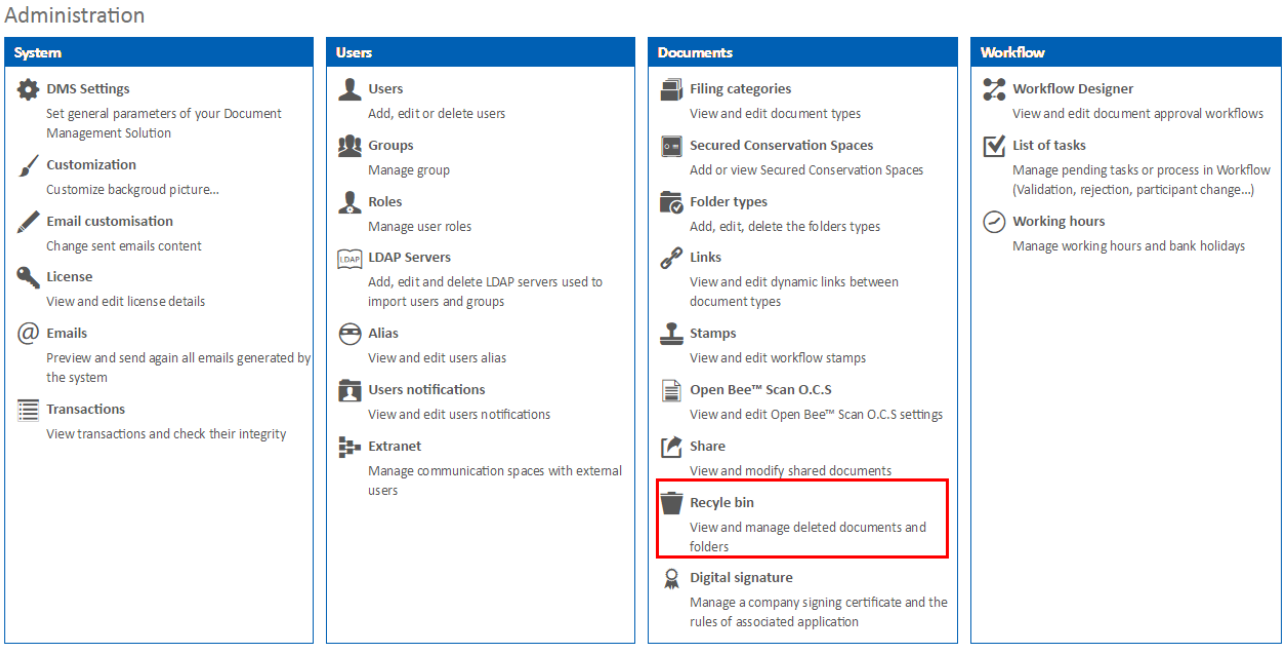
  It is possible to provide multiple emails in this field separated by commas ","

  The other parameters are the same as those requested during manual sharing.

Once validated, automatic sharing is available and can be modified at any time in the list of the same screen

Recycle bin

This section from the administration allows you to permanently erase or restore documents deleted by users.



One or several folders and/or documents can be deleted from KOMI Doc, voluntarily or involuntarily, by users having permissions to do so.

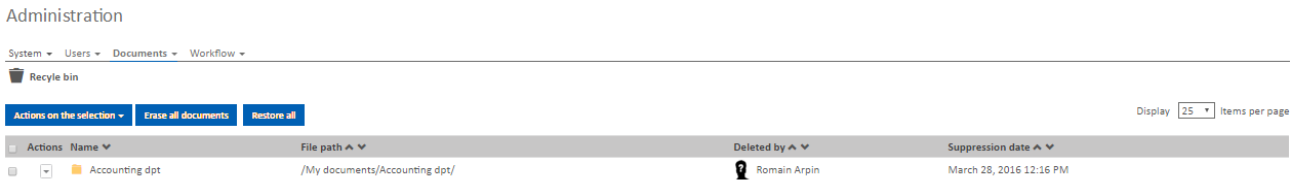
Once it has been deleted, a document is not accessible to any user.

"**Actions on the selection**": allows the administrator to erase (delete) the selected document(s), or to restore them to their original location (it is possible to select several documents).

"Erase all documents": allows to erase without selecting from the documents list.

"**Restore all**": allows to restore without selecting in the documents list.

It is possible to visualize when and who deleted the documents in the first place.



Digital signature

The digital signature allows to apply a server certificate stamp manually or automatically on archived/classified documents in KOMI Doc.

A server certificate stamp is the digital stamp of your company or a physical person allowing to certify digital documents .

To set up your certificate, visit the "**Administration \ Digital Signature**" section.

This feature requires KOMI Scan OCS and an Internet connection to function .

To be enabled, the digital signature function requires a certificate allowing to identify your company. This certificate is delivered by **a trusted third party**.

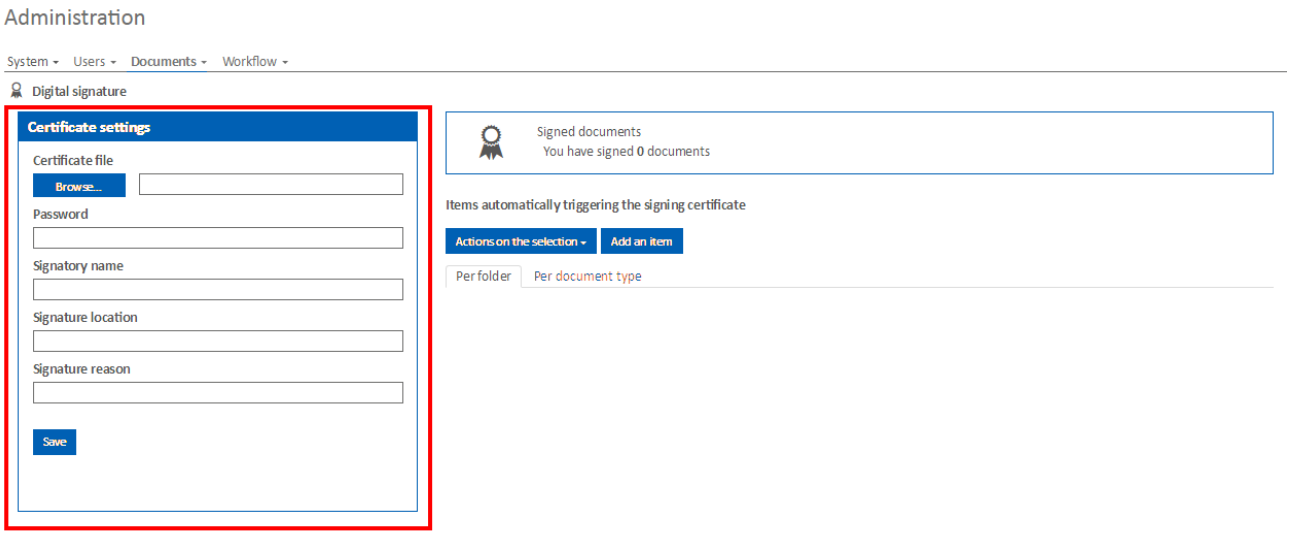
We recommend that you use an RGS * server stamp. Example at ChamberSign provider :
http://www.chambersign.fr/certificat-cachet-serveur-negocio/

Register a company certificate

From the tab "**Server stamp**" on the left side of the administration screen, a download form allows you to register your certificate and the associated password.

- Certificate file. This file must be in PKCS#12
- Password associated to the certificate
- Optional information related to the signature. We recommend to indicate here the name of your company, documents' storage location and a reason such as "Dematerialization".

Your certificate password is encrypted by an AES 256 bits alogorithm in order to ensure its security.



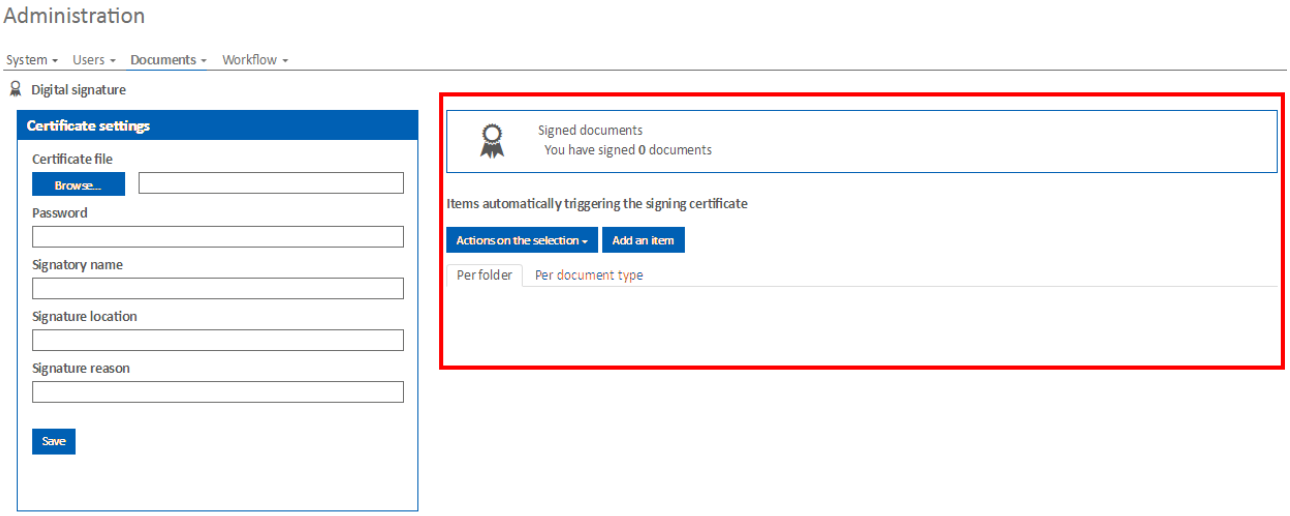
Automatically sign documents during their filing

On the right side of the administration screen, you can set up rules to automatically attach a signature to documents as they are added. Two ways are available:

- **per file** : all incoming documents in the selected folders and sub-folders will automatically be signed
- **per filing category:** all documents classified with these filing rules will automatically be signed

This automatic signature rules are useful but can provide access to the electronic signature to a large number of users.

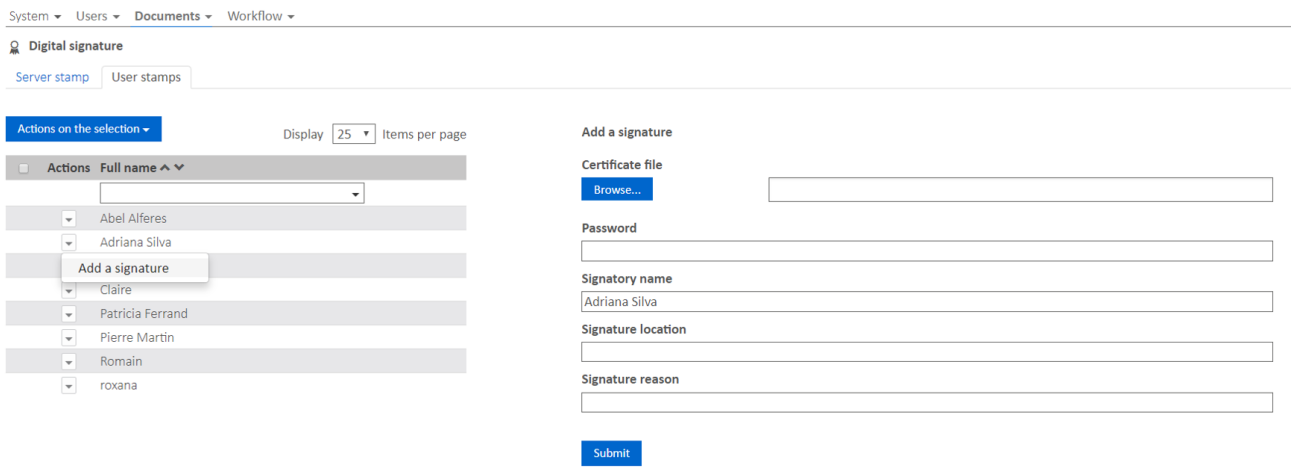
A user with permissions to file a document with a filing category which automatically triggers a signature is implicitly authorized to sign documents with the company stamp.



Register an individual certificate

In addition to the company certificate, global to the solution, it is possible to define certificates for each user.

From the tab **"User stamps"**, select a user from the list on the left. The form on the right part allows to register an electronic certificate which will be attached to the user and can be used only by the user.



The user can also define his certificate himself from his user profile.

Manually sign documents

From the documents preview interface, users with the required permissions can manually sign documents or in batch action.

The action of "Signing" is only available under the following conditions:

- the document is a PDF
- the connected user have the required permissions
- a certificate has been registered in the administration section

Workflow administration

A "**workflow"** consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services, or process information. It can be

depicted as a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms.

From a more abstract or higher-level perspective, **"workflow"** may be considered a view or representation of real work. The flow being described may refer to a document, service or product that is being transferred from one step to another.

Workflows may be viewed as one fundamental building block to be combined with other parts of an organization's structure such as information technology, teams, projects and hierarchies.

Source : wikipedia https://en.wikipedia.org/wiki/Workflowhttp://fr.wikipedia.org/wiki/workflow

In this definition, an important point for the development of a workflow is noted: **The workflow describes the approval circuit, the tasks between the different process participants, deadlines, validation modes, and provides to each of the participants the necessary information to carry out its task.**

A comprehensive study of one or more business processes is therefore essential before creating a workflow.

Fonctional workflow automation (e.g.: the superior validation) is generally outcoming from homogenization, rationalization and optimization of communication desire within the company.

When studying a workflow, we must distinguish and highlight:

- Objects that are part of the business process: paper document, electronic, or other ...
- The different states of objects: created, modified, being validated, validated, ...
- The participants that interact with the workflow: validation, correction ...
- Processing deadlines of a task
- The automated actions

Conditional workflow configuration requires the use of one of the following browsers:

- Internet Explorer 10 or plus
- Firefox
- Google Chrome

Dans cette section

Conception phase

The first part of the workflow creation is to identify the workflow and its potential users. You can then define the tasks to validate for each one of them.

A workflow contains some information that need to be carefully defined

- A name allowing its identification.
- A description which introduces the context
- A document type (or folder) which determines how the workflow will start
- Actors who will take part in the process
- Steps and transitions which allow the document to evolve
- Tasks to affect an action to one or several actor(s)
- Time periods to validate those tasks

Workflow types

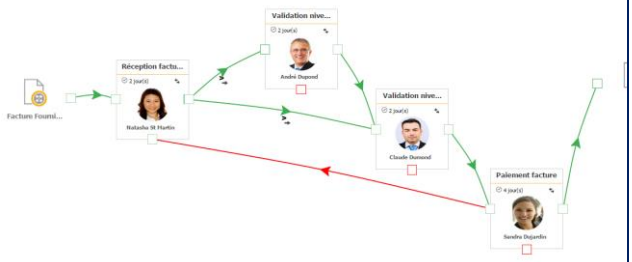
Workflow creation

Workflow types

There are two workflow types in KOMI Doc:

- **Linear** workflows

- **Conditional** Workflows

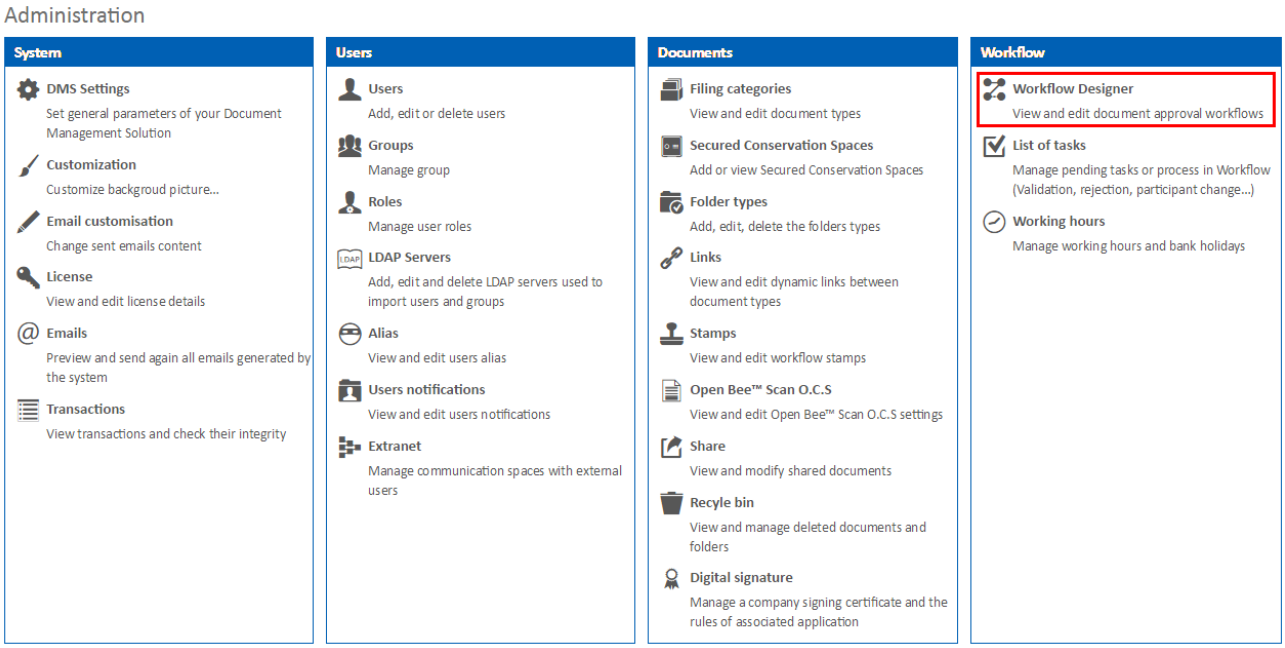
Linear workflow	Conditional workflow
The tasks order is predefined. No rollback is possible.	Tasks order, users to whom the tasks are assigned to may vary, rollbacks or parallel tasks are possible.
	

Workflow creation

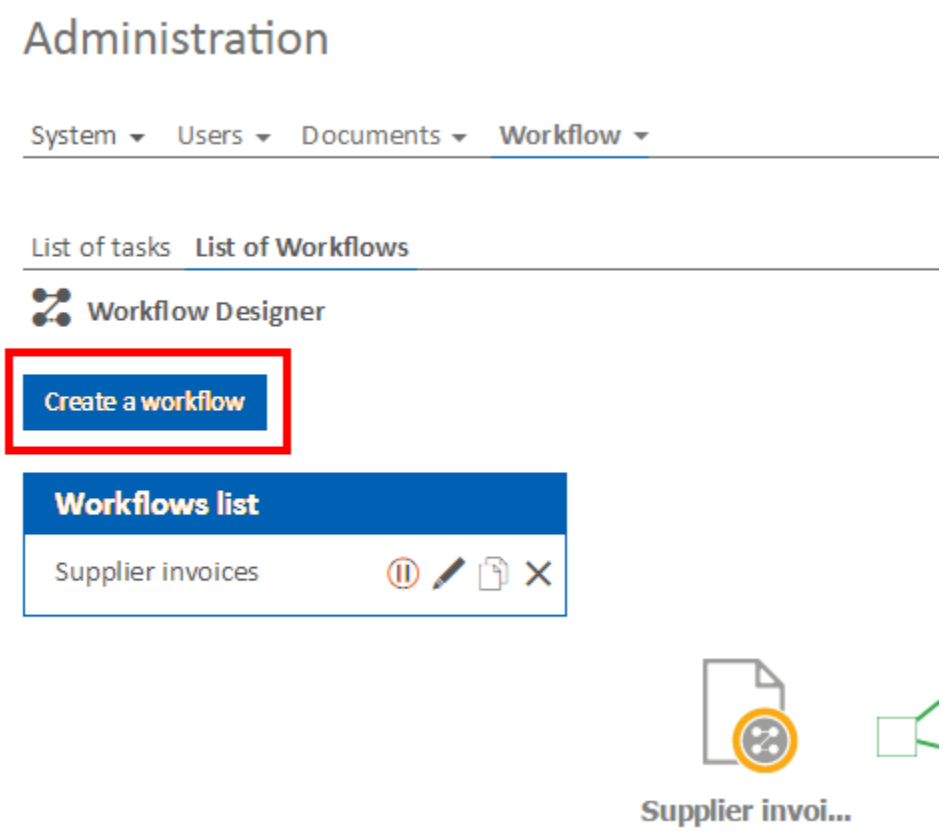
Within KOMI Doc, only the administrator has the right to create a workflow.

> **Prerequisites**
>
> It is essential to create users accounts first within KOMI Doc, before starting with workflow creation.
>
> Otherwise, you won't be able to affect the tasks to actors (users).

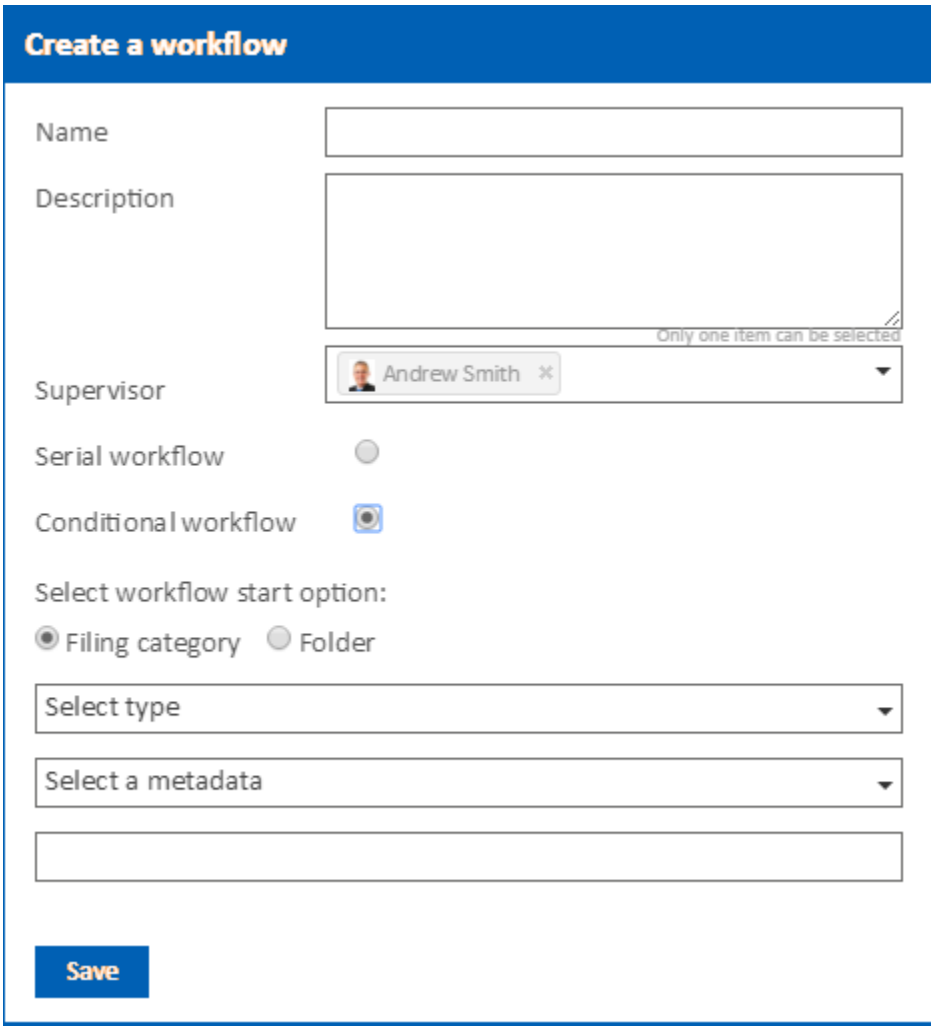
From the "**Administration"** section, click the "**Workflow Designer"** tab.



1 - From the "**Workflow**" \ "**List of Workflows**" section, click on "**Create a workflow**"



2 - Create a workflow

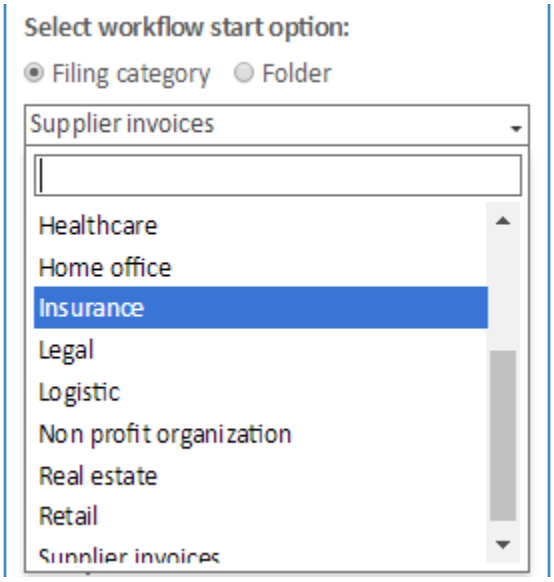


- Enter the name of the Workflow (for instance "Supplier invoices approval") and if needed, add a description.
- Select the supervisor of your choice by clicking on the drop-down list (Andrew here).
  Only the supervisor has access to the workflow management and monitoring.
- Select the Workflow type: Linear or Conditional
- Choose the workflow's activation mode. Which criteria can trigger a workflow when adding a document in KOMI Doc.

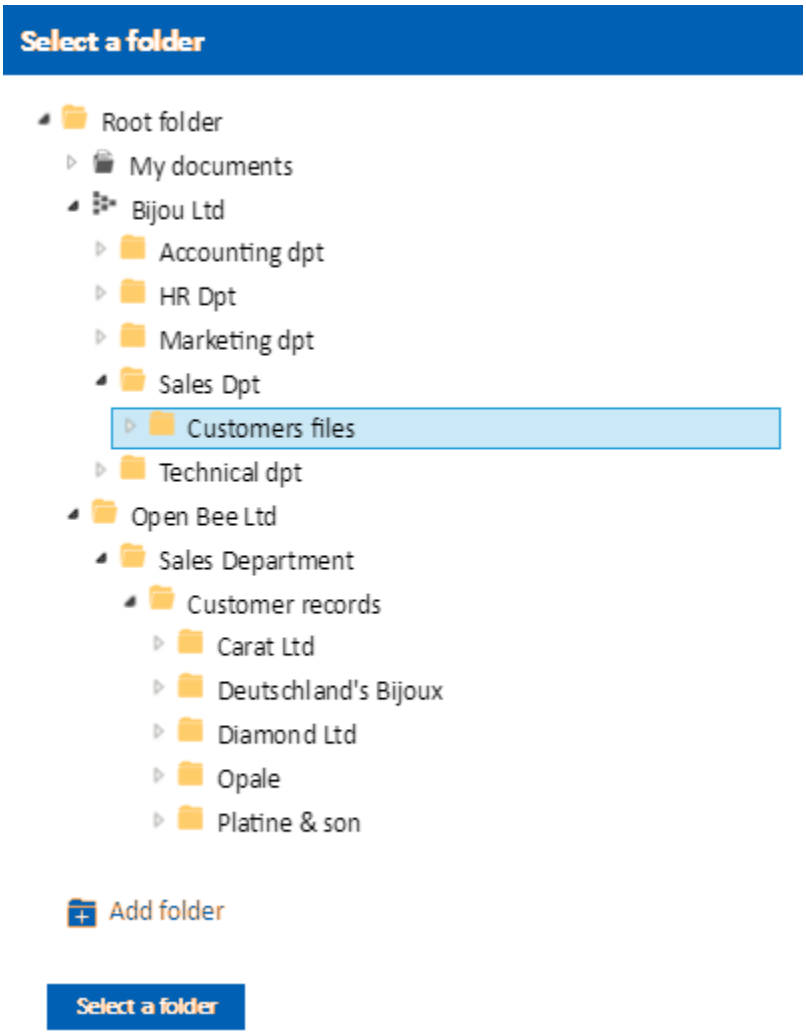
> To achieve this step, it is necessary that the folder or filing category already exists in KOMI Doc

- "Select workflow start option:" : It is possible to choose between 2 options :

- "**Filing category**" : The workflow will start as soon as a document, corresponding to the selected category, will be classified in KOMI Doc (eg : Invoice).



- "**Folder**" : the workflow will start as soon as a file will be classified in the selected folder (or sub-folder) of KOMI Doc (eg : «SUPPLIER FILES»)



- Click the "Save" button to finish.
  - A message appears, confirming that the Workflow has been added successfully. It appears in the workflows list.

- The name of the Workflow and the supervisor are mandatory fields, the description is an optional field.
- The supervisor is the person in charge of starting the Workflow and will have a global overview of the processing chain (see Workflow monitoring).
- Conditional workflows require a special license.

You can afterwards configure the advanced Preferences management and create the workflow tasks (see: Tasks creation and modification).

The tasks in a workflow are the actions to perform. Each task is associated to a participant. A participant is a user or group of users created in KOMI Doc.

Transitions are the links between workflow tasks.

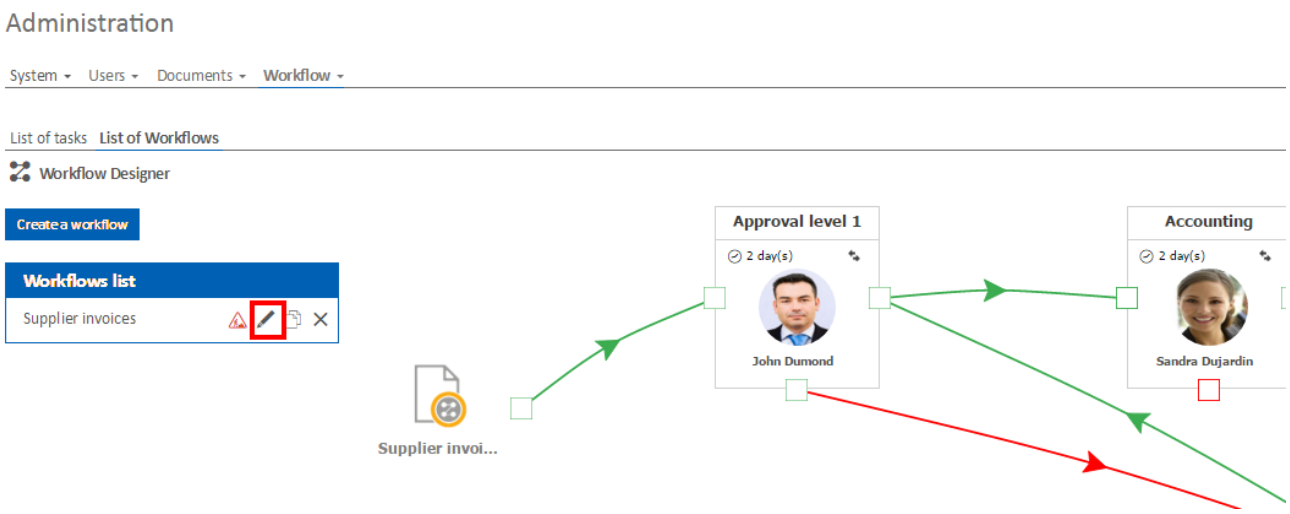
The **tasks** and **transitions** configuration depends on the chosen workflow type: linear or conditional.

Transitions configuration of a linear workflow

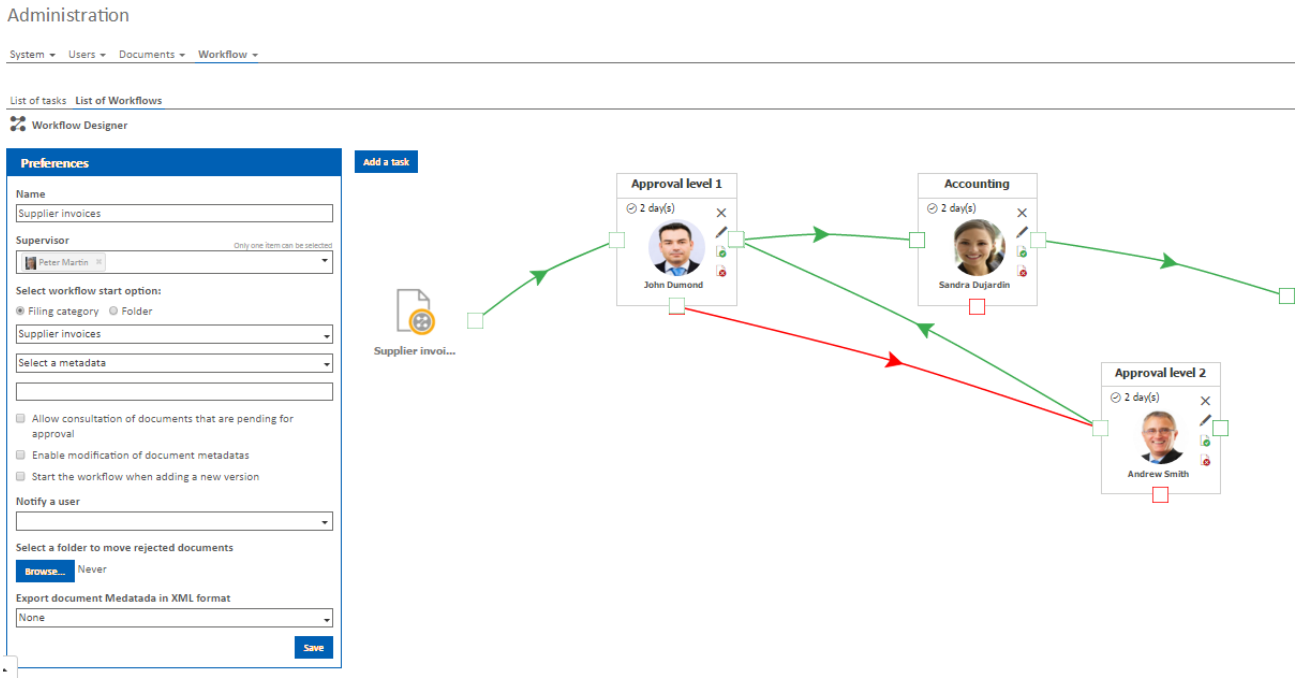
Transitions configuration of a conditional workflow

Preferences management

From the workflows list, click on "**Edit the workflow**":

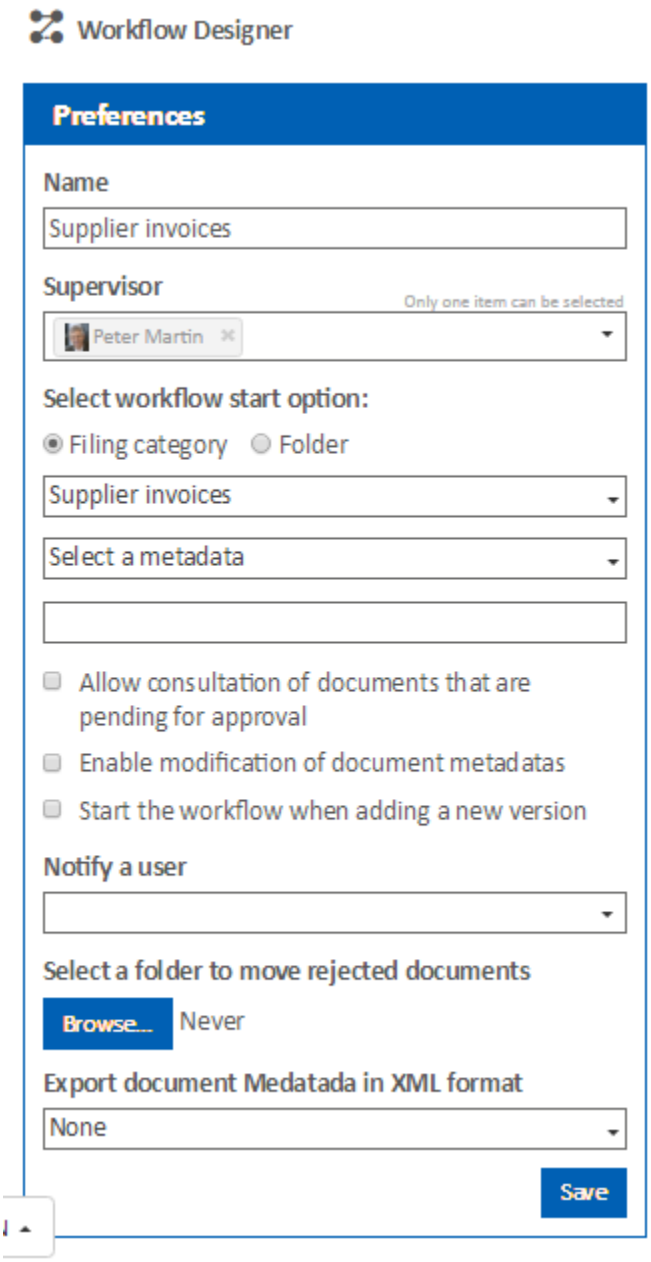


The workflow diagram is displayed as well as the **"Preferences"** form (left side of the screen).



The parameters defined when creating the workflow (see: Workflow creation) are editable from this form:

- Name
- Supervisor
- Workflow activation



Additional parameters are also available:

- **Allow pending documents consultation:** Check this box so that pending documents in the workflow are visible by users in the "Documents" tab.
- **Allow metadata editing:** Check this box to allow the workflows actors to edit metadata during a task processing.
- **Start workflow when adding a version:** check this box so that the workflow is triggered when adding a new document version.

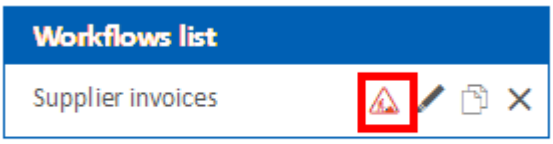
- **Notify a user:** select a user or group to be notified when a document exits the workflow (either approved or denied)**.**
- **Move the documents in this folder in case of refusal:** select a folder from the EDM in which all rejected documents in the workflow will be moved.
- **Workflow output XML export:** check this box to activate the metadata export in XML format when a document exits the workflow. The exported data is stored on the server, in the sub-folder "data/workflow/exportXML" in the installation folder.

Click **"Save"** to save the setup of your workflow.

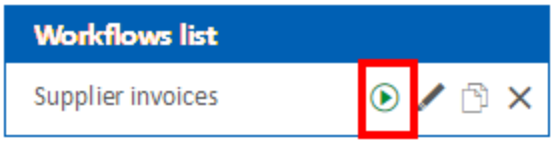
The workflow can be saved at any time by clicking the **"Save"** button, even if the setting is not complete.

The workflow can be completed and validated at the next connection.

A saved workflow may not be valid if there are missing transitions. In this case, it can not be started and will not be visible by the supervisor.



A saved and valid workflow can be started. It is visible by the supervisor.



Tasks creation and modification

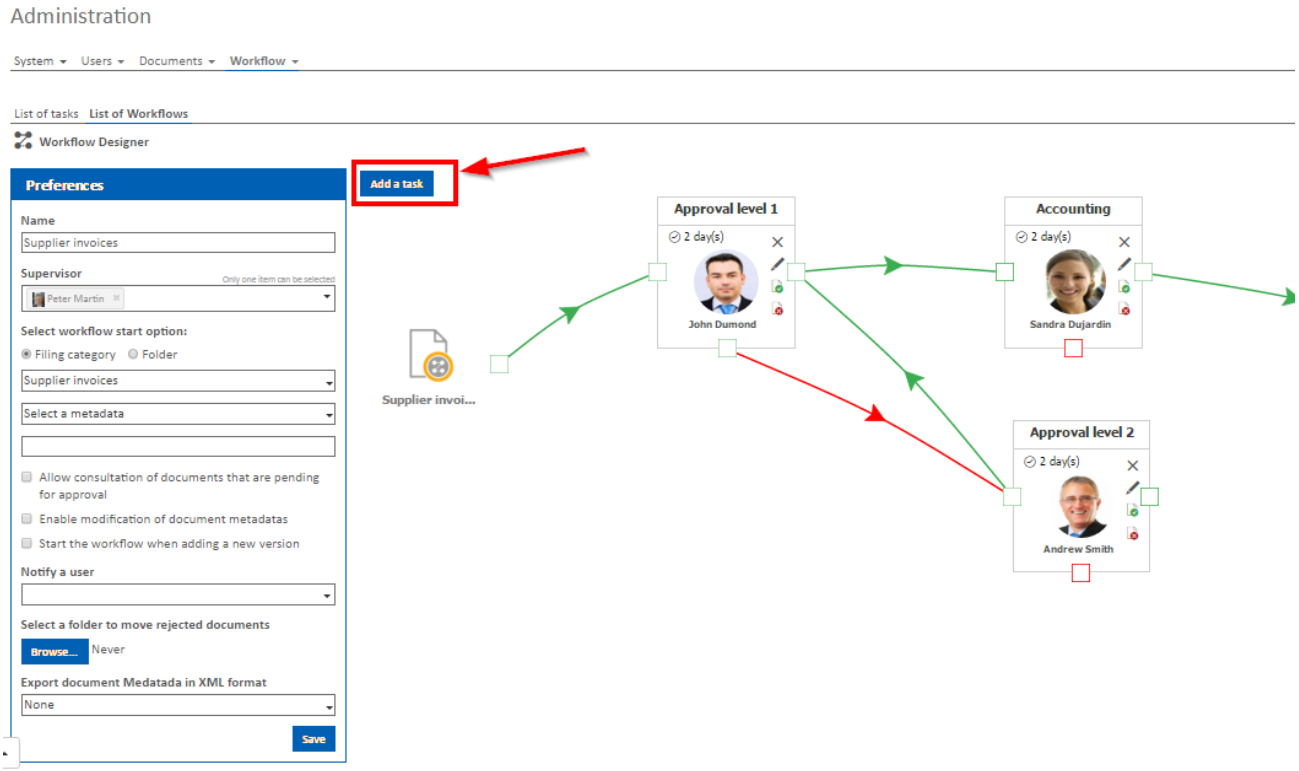
After creating a workflow and configuring its **preferences,** it is necessary to create its **tasks**.

- Add a task
- Stamps
- Dynamic participant

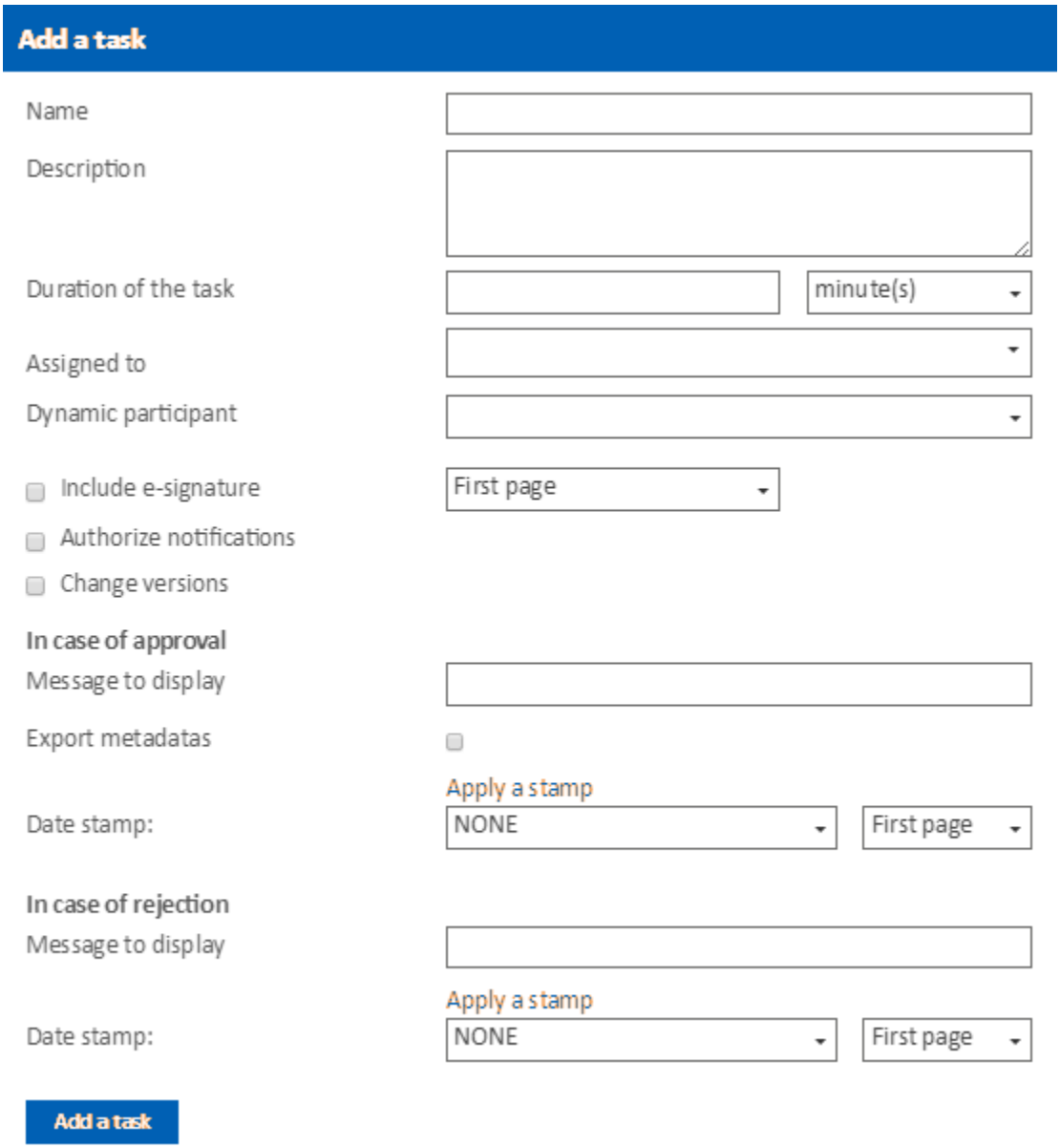
- Edit / Delete a task

Add a task

From the edition workflow screen, click on the "**Add a task**" button



Complete the window



- **Name:** Enter the task name

- **Description** : Enter the task description (optional).

- **Duration :** Insert the time period given to the user to validate this task (it will be associated to the tasks later on) in minutes/hours/days/weeks or months.

- **Participant**: Choose the task participant among the KOMI Doc groups and users
- **Dynamic participant** : Select a metadata from the drop down menu. (For more information, refer to the **"dynamic participant"** section below).

- **"Signable document" box:** Allows the document signing during the task validation from a mobile device.
- **"Allow notifications" :** Allows the task participant to choose a user or a group of users to notify when validating or rejecting a document in this task.
- **"Versions modification" box** : Allows the task participant to change the main document version or to add document versions.
- **In case of approval:**
    - **Display the message:** Enter the approval button title (displayed when processing a task).
    - **Metadata export:** Allows to export documents metadata in an export file. This file could be processed afterwards by an another software (Example: perform accounting integration in the case of processing supplier invoices).
    - **Add a stamp:** Add a stamp to be applied to the document in case of approval. (For more information, refer to the "Stamps" section below).
    - **Stamp with the current date:** Select the stamp position on the document, the current date will be applied
- **In case of rejection:**
    - **Display the message:** Enter the rejection button title (displayed during a task processing).
    - **Add a stamp**: Add a stamp to be applied to the document in case of rejection. (For more information, refer to the "Stamps" section below).
    - **Stamp with the current date:** Select the stamp position on the document, the current date will be applied
- Then click on the "**Add a task**" button.

Stamps

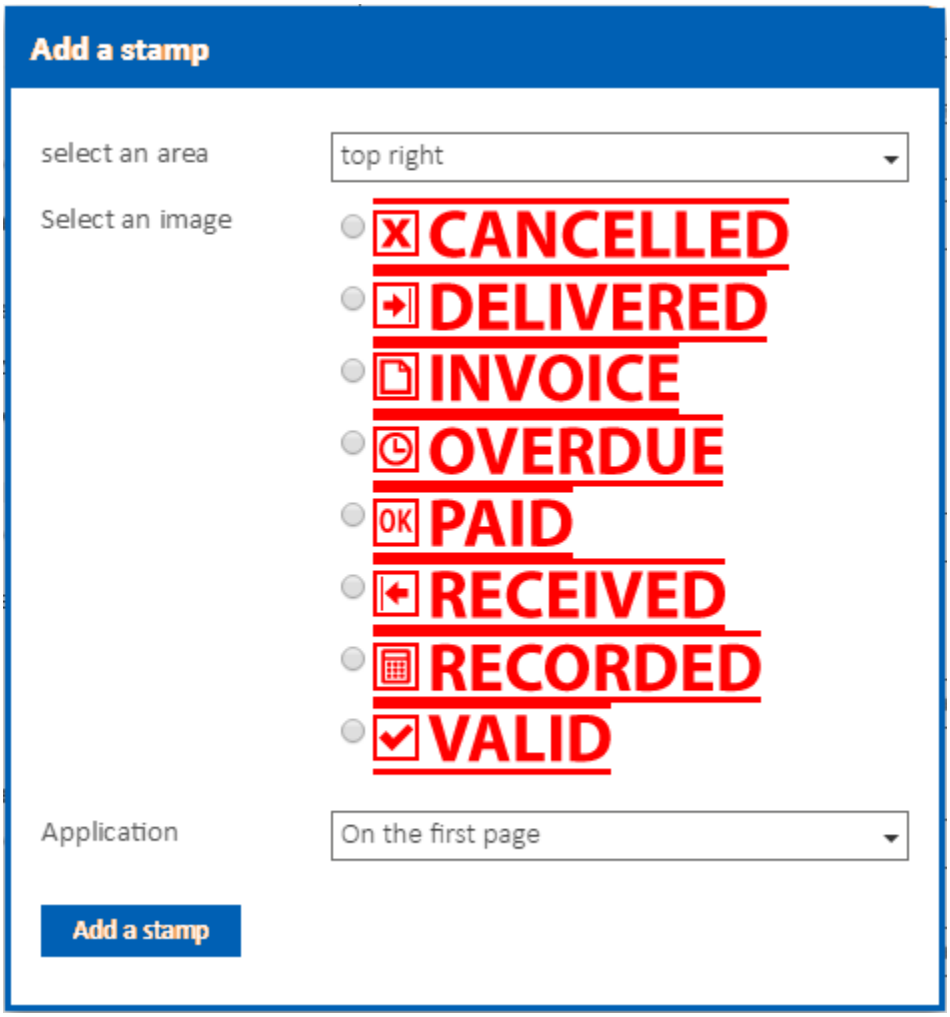
A stamp is added in case of a task approval or rejection when the user processes the task.

The chosen stamp will be automatically applied. It will be visible for the following participants of the following tasks.

A certain number of stamps are provided. It is possible to add new stamps from a dedicated area within the administration.

For more details see the Stamps section.

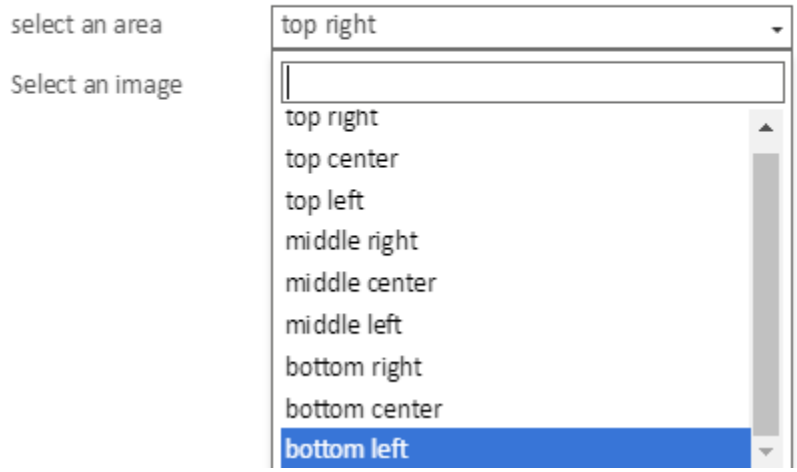
"**Add a stamp**": Allows to select a stamp.

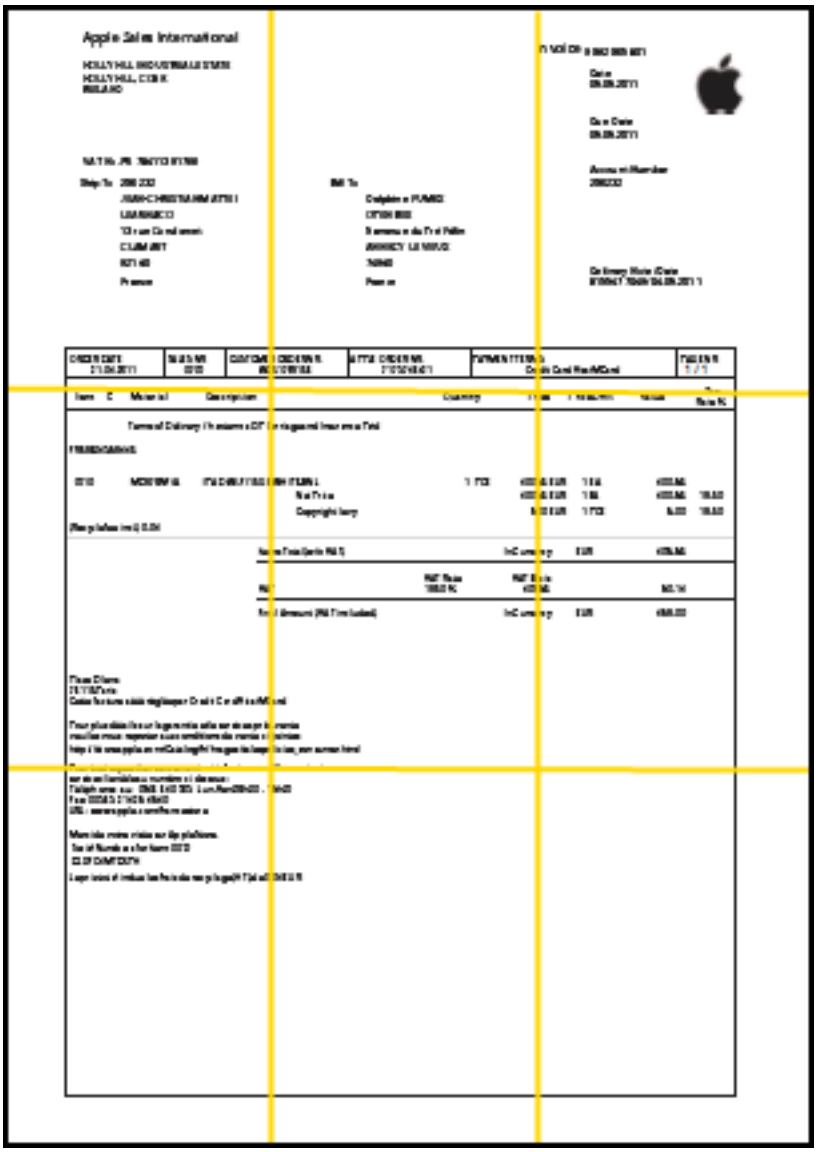


When selecting the stamp, it is possible to choose an area of the document on which the stamp will be applied.

A page is divided into 9 areas:

Add a stamp


select an area
top right
Select an image
top right
top center
top left
middle right
middle center
middle left
bottom right
bottom center
bottom left



It is also possible to select the page on which the stamp will be applied:

- first page
- last page
- all pages

Stamps and files' format

Stamps are only applicable on PDF documents in the format 1.4.

Dynamic participant

This feature allows to assign the document to a different participant than the one specified in the definition of the task.

To work, this option requires:

- That a document is filed with a KOMI Doc filing category.
- That users aliases are defined (Alias configuration: Alias)

Example:

We manage a workflow triggered on the filing category "Purchase order".

The first workflow task has for participant Natasha and the metadata "Zip code" is selected as " dynamic participant".

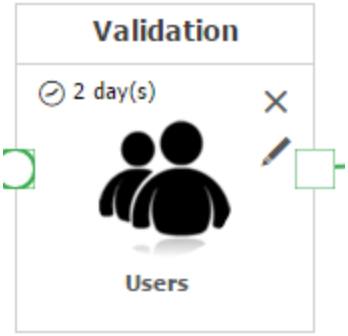
A user, Andrew, has the 74940 and 74000 aliases. A document entering the workflow is assigned to Natasha, but if the document contains one of Andrew's aliases as the "Zip code" metadata value, then the document will be assigned to Andrew.

Functioning:

- A document is filed with the "Purchase order" filing category with the "Zip code" metadata containing the "74940" value.
- The "Purchase order" workflow starts.
  KOMI Doc then compares the "ZIP code" metadata value with the aliases available in the system. The "74940" value being associated to Andrew, the first task's participant will be dynamically changed. Andrew will be responsible for validating the document instead of Natasha.

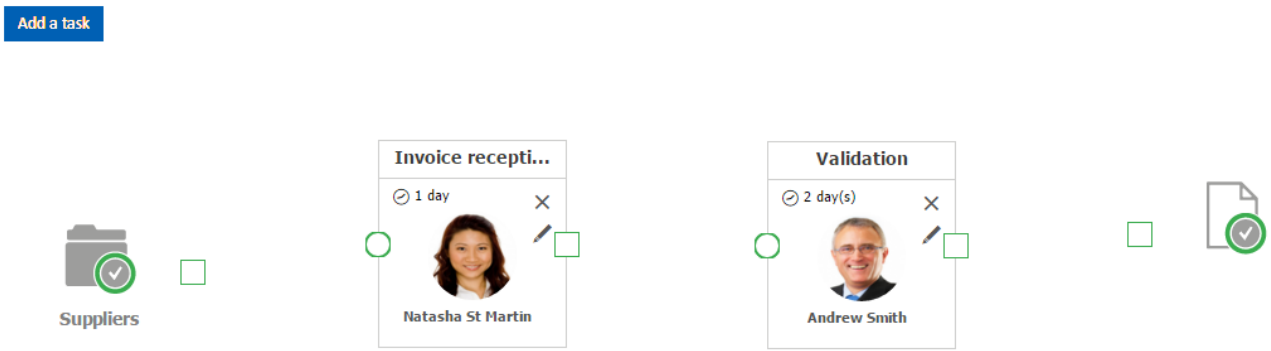
Edit / Delete a task

- To delete a task, simply click on the cross at the top right corner of the task. **Caution:** this operation is not reversible.
- To edit a task, click on the pencil on the top right corner of the task. The form that was used for its creation will be displayed and the details can be modified.



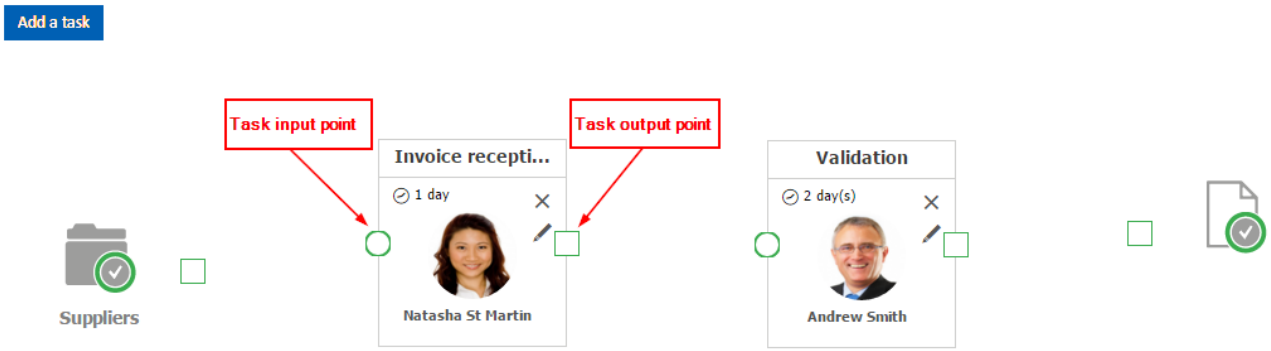
Transitions configuration of a linear workflow

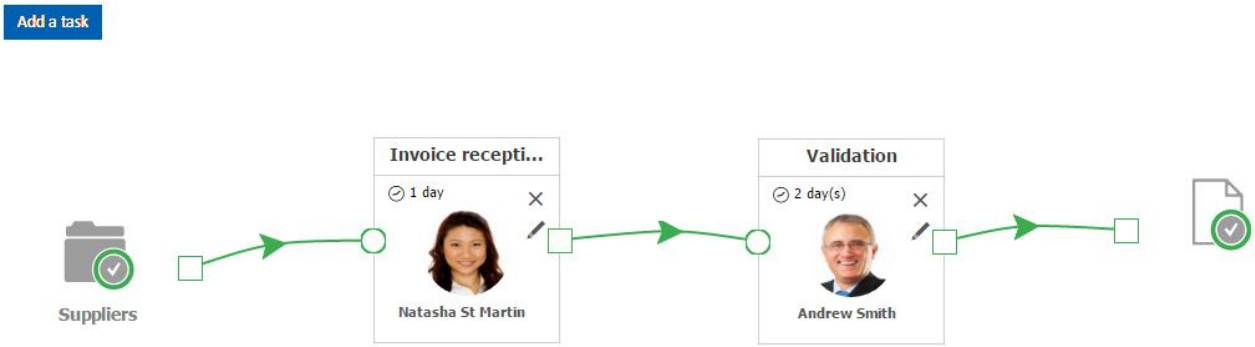
Once the tasks are created, they are displayed in the diagram representing the workflow.



It is now necessary to connect the tasks with transitions to define the processing order of these in the workflow.

To do it, make a simple pull and drag from the task exit point towards the entrance point of another one.

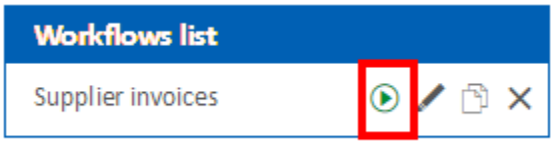




Your workflow configuration is done.

Click "Save" to finish.

The icon indicates that the workflow is correctly configured and can be started.

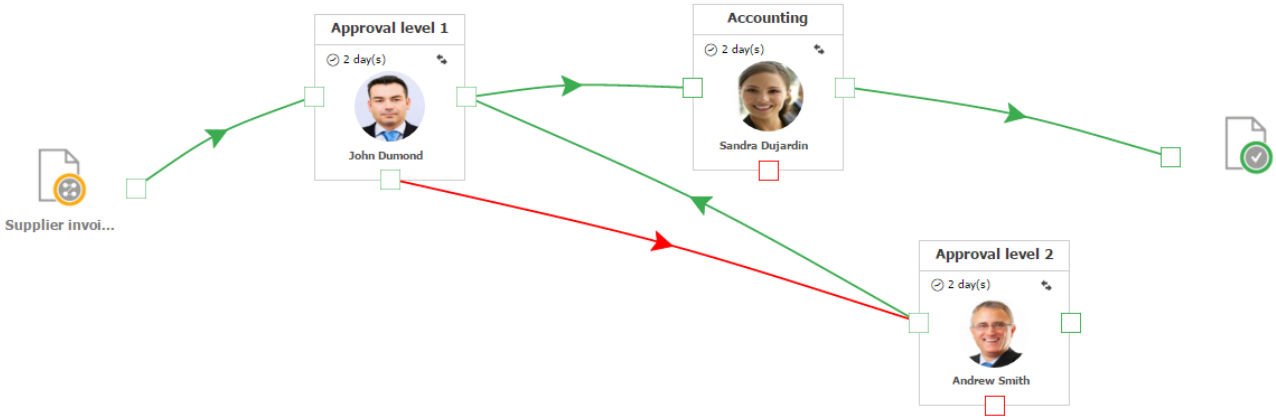


Transitions configuration of a conditional workflow

By default, no transition is created between tasks.

The workflow's input and output transitions are implicit:

- The first task will be the workflow's input task by default.
- The tasks without transition (which is the case when created) end the workflow: a task approval or rejection ends the workflow.



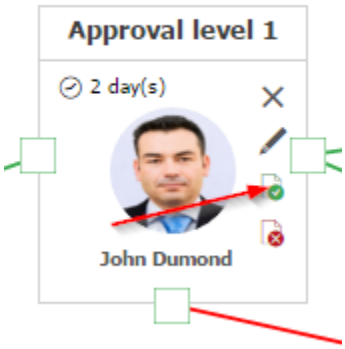
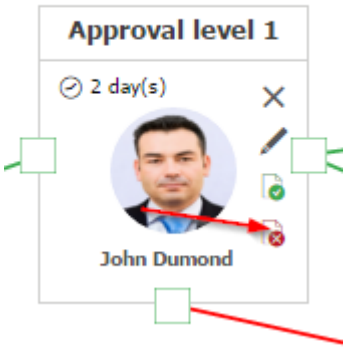
In this page:

Approval or rejection transition

Conditional workflow transitions can be created by pulling and dragging as in a linear workflow (see: Transitions configuration of a linear workflow).

To set up a transition, click on the appropriate icon in the header of a task:

- Arrow: approval transition
- Cross: rejection transition

Document *approval* transition	Document *rejection* transition
	

Unlike a linear workflow, it is possible in a conditional workflow to keep the document in the workflow when the document is rejected.

This is possible by configuring a rejection transition.

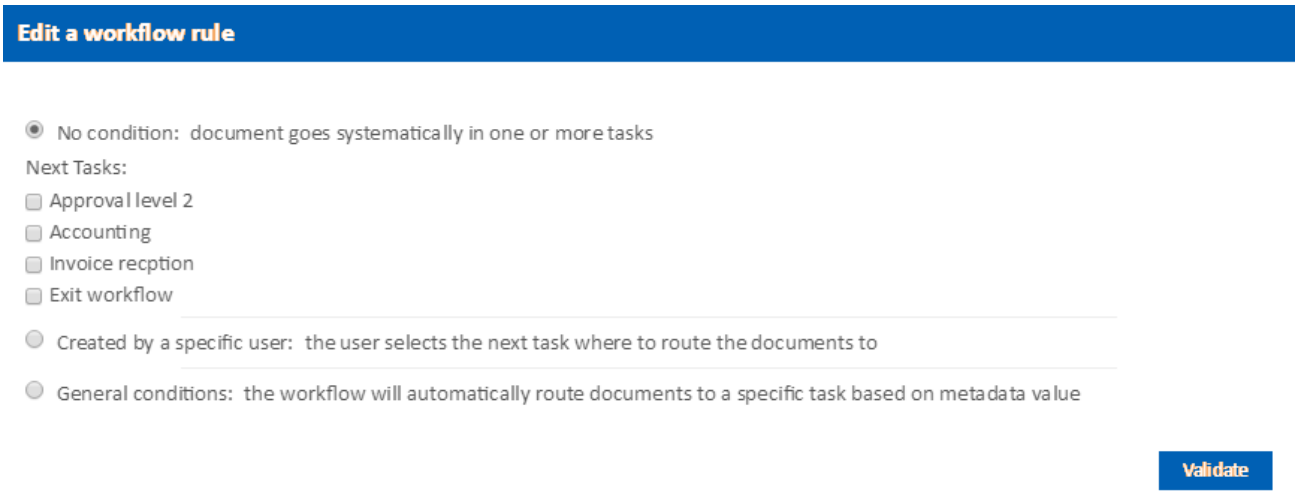
If the rejection or approval transition configuration for a task does not exist, the document rejection or approval in this task will complete the workflow for that document.

Configure a transition

The transition configuration form is the same for rejection or approval transitions.

It lets you choose between three types of transitions:

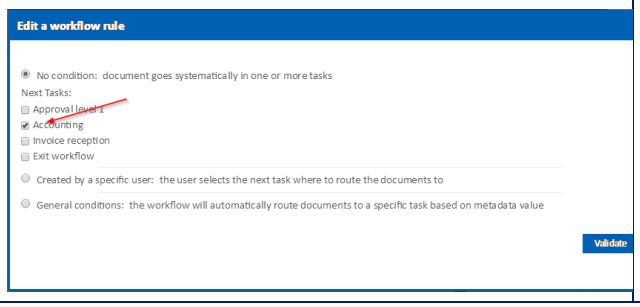
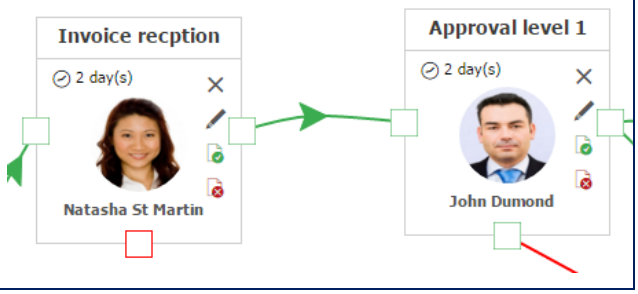
- No condition
- User condition
- Dynamic condition



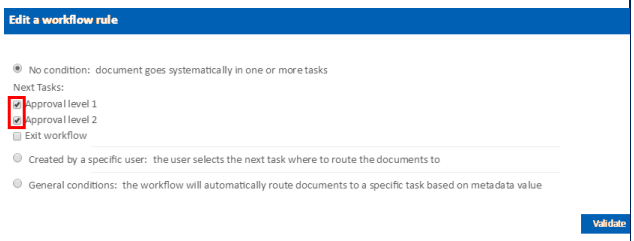
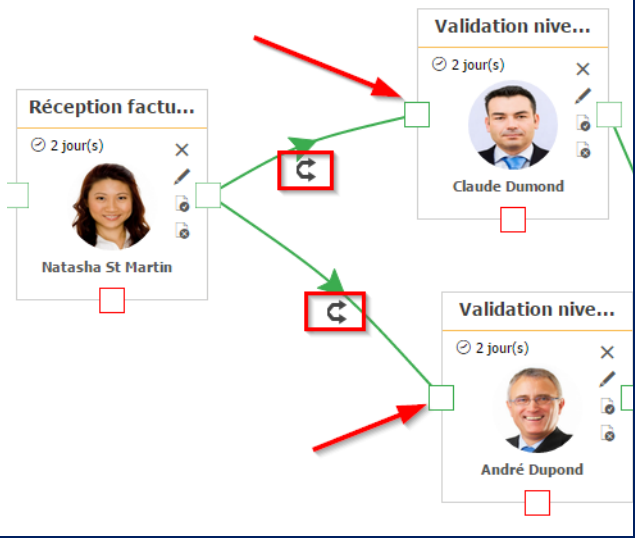
Transition without conditions

This option allows to systematically send the document in one or more task(s).

By using this option, it is possible to reproduce the behavior of a linear workflow. **A task simply follows another.**

Transition configuration	Visual representation
	

This option also lets you send a document to **multiple tasks in parallel**, by simply checking the various tasks.

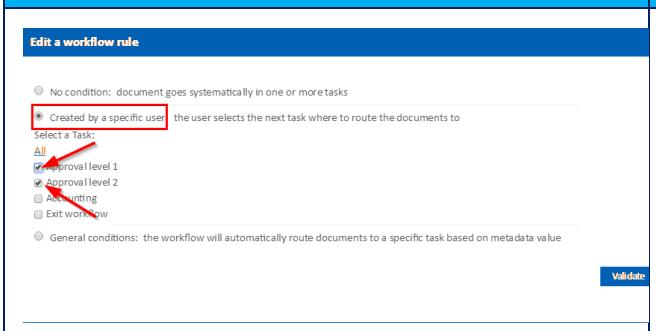
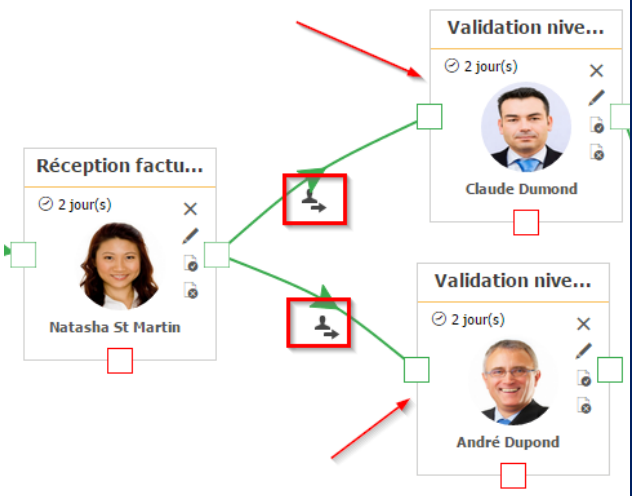
Transition configuration	Visual representation
	

In this case, when Claude validates a document, it will be sent simultaneously to Natasha and to an Accounting group user.

Transition with user condition

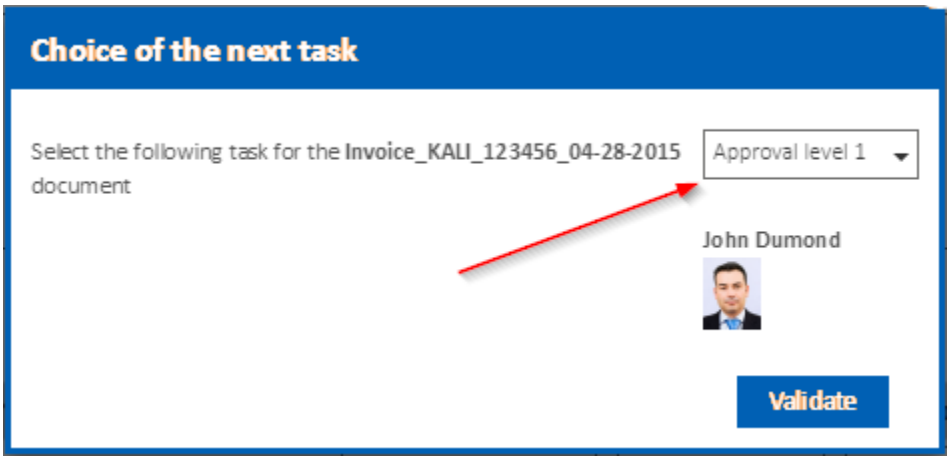
With this option, it is **the task participant who will choose the next task**.

The sequence of tasks is not determined in advance. It will depend on the task's participant choice.

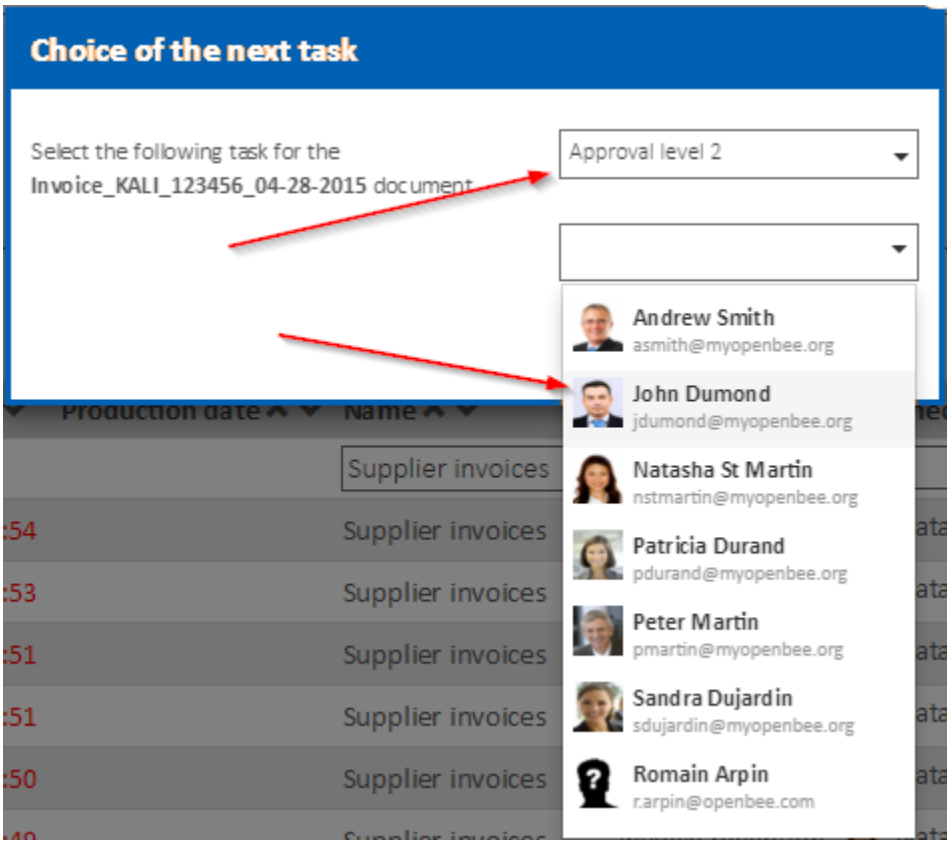
Transition configuration	Visual representation
	

The administrator must select tasks among which the paticipant will have the choice of the next task.

In this case when Natasha validates a document, a form will give her the choice of the next task among the "Approval level 1" and "Approval level 2" tasks. The selected task participant is displayed:



In the case where the participant of a chosen task is a group, he will also choose the group user who will process the document:



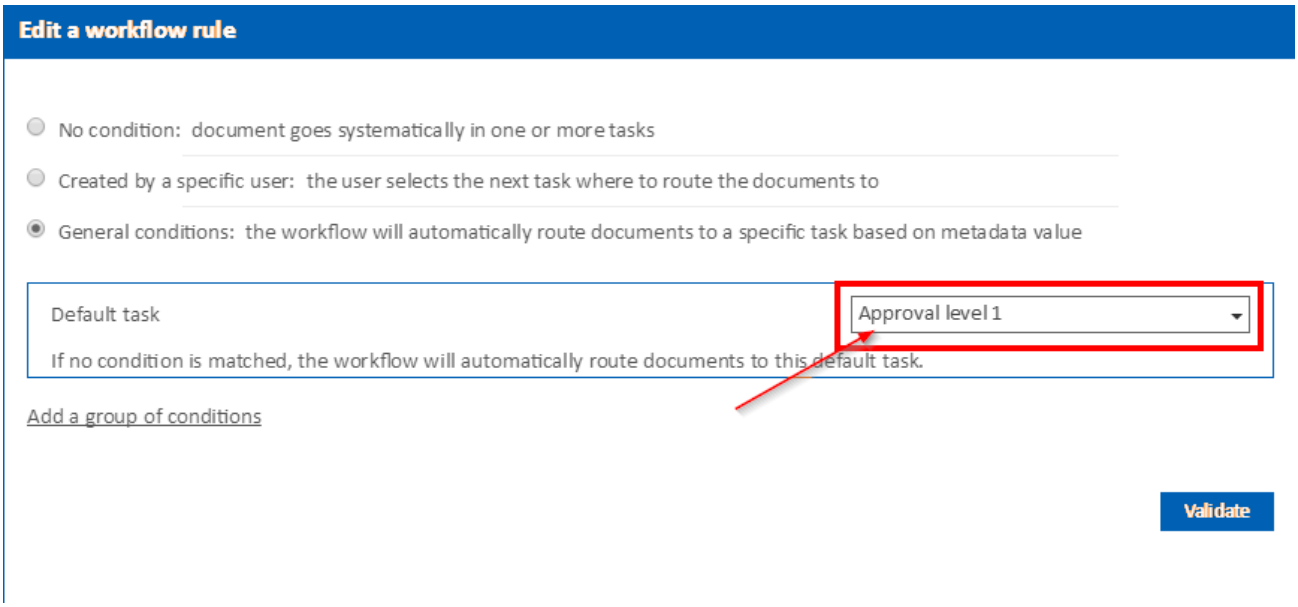
Transition with dynamic condition

With this option, it is **the value of one or more document metadata that identifies the next task.**

The choice of the next task is automatically managed by KOMI Doc depending on the conditions that have been set.

Task by default

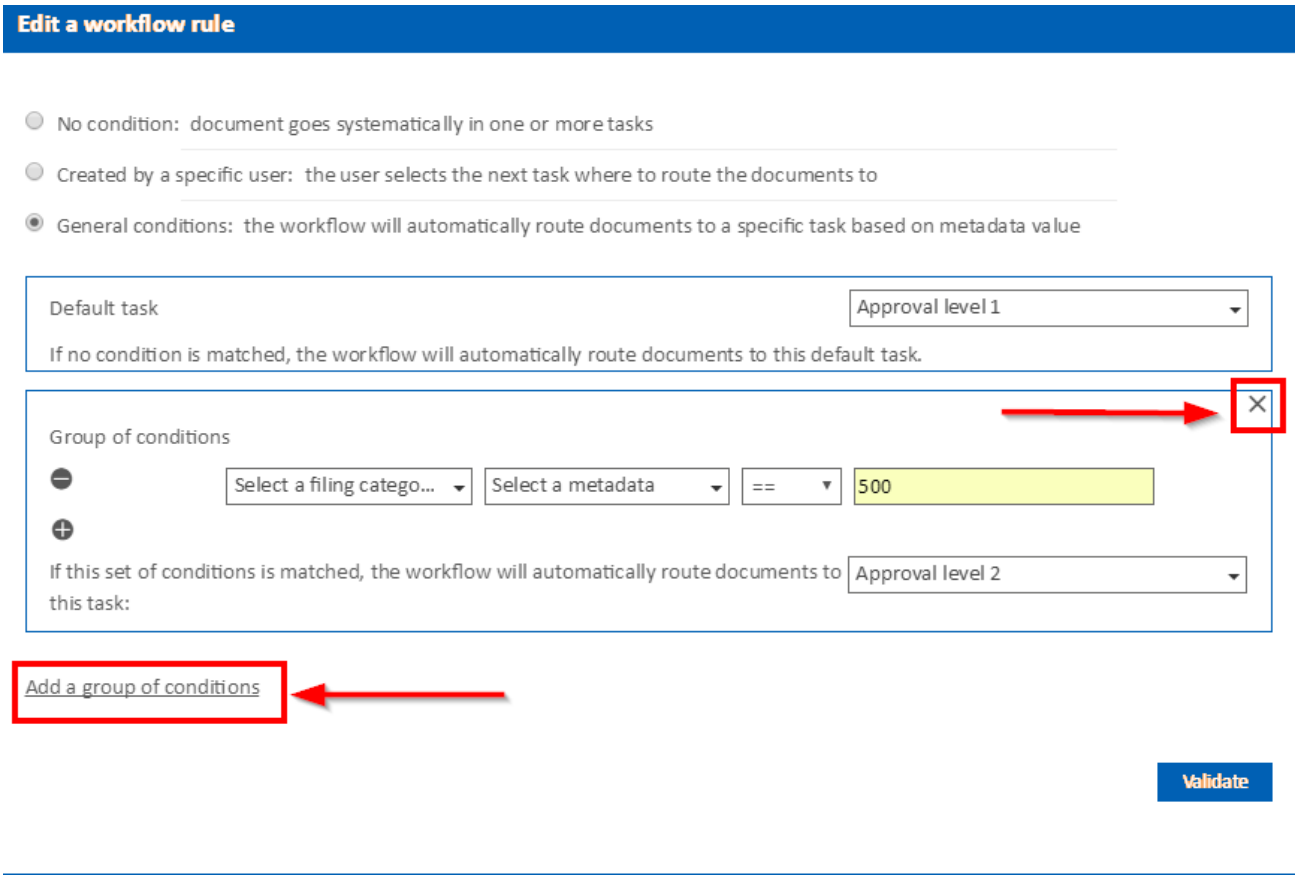
This is the task the document will be sent to if the document metadata does not respect any conditions.



Conditions group

A conditional transition can have multiple sets of conditions.

- To add a group of conditions, click on the "**add a group of conditions"** link.
- To delete a group of conditions, use the cross at the top right corner of the group of conditions.



A group of conditions allows to define the conditions that trigger the document transition in a given task.

Therefore, it contains:

- a task to which the document will be sent if it meets all the conditions.
- a list of conditions based on the document metadata.

It is possible to add and remove conditions from a group using the "+" and "-" buttons.

Condition

A condition is defined by:

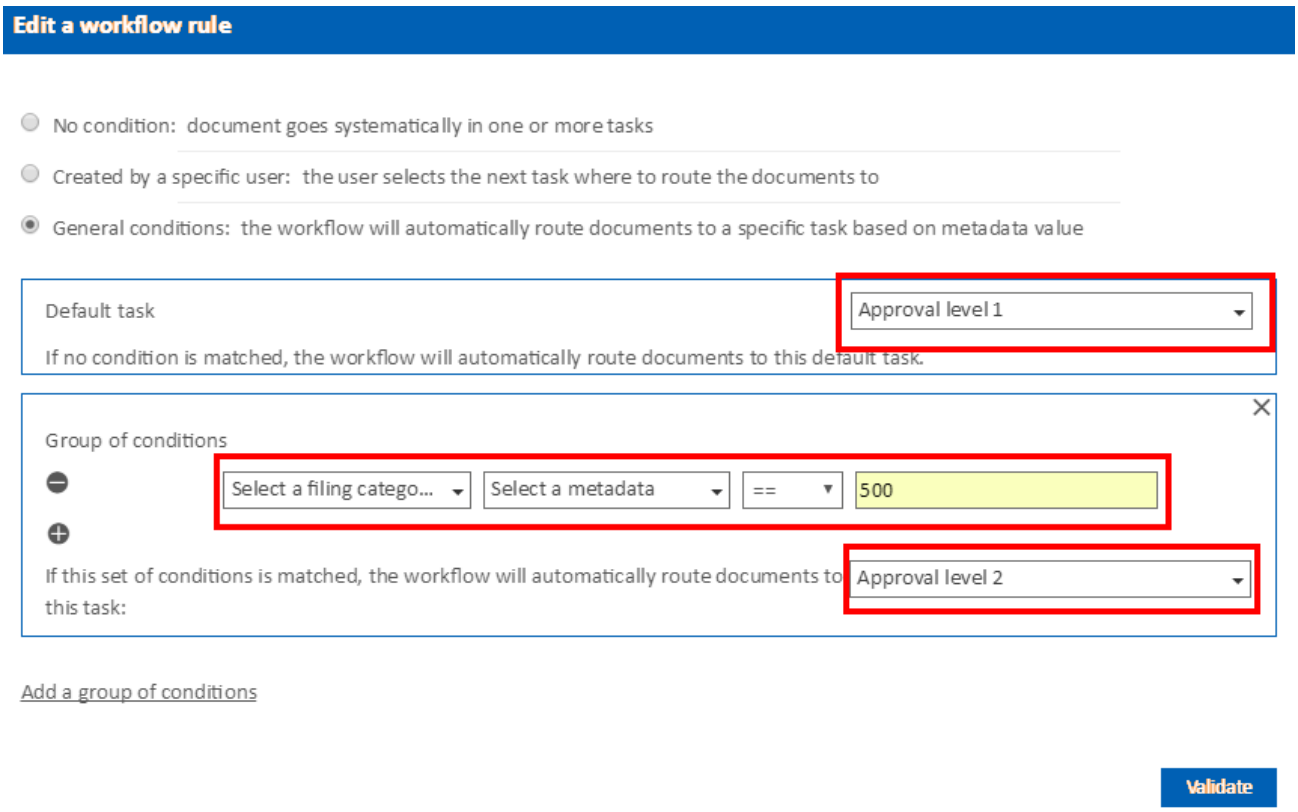
- a metadata belonging to a category file.
- a comparison operator: "=", "<=" , "<", ">=", ">", "IN", "NOT IN"
- a reference value

It is possible to add and remove conditions from a group using the "+" and "-" buttons.

Example :

Invoices which amount is >= 500€ must be approved by Claude (Approval level 2). Invoices under this amount can be directly recorded after the unique validation of Andrew (Approval level 1).

- The task by default: "Approval level 1".
- The condition: the "amount" metadata of the "Supplier invoice" filing category is greater than or equal to 500.
- The condition group, which contains a single condition in this example, allows to send the document in the task "Approval level 2" if the invoice amount is equal to or above 500.



Important notes

1. If several contradictory conditions are entered in the same conditions group, the task of this group will never be executed.
2. If the document metadata meet several conditions, only one will be selected arbitrarily.
   It is necessary to make sure that the conditions groups are exclusive.
3. Conditions are interconnected by logical operators "OR" (Logical disjunction) "AND" (Logical conjunction) .

Specificity of workflow input tasks

It is possible to configure a dynamic condition on the input workflow transition.

All tasks connected to the input of the workflow cannot have a group of users as participant.

Emails in the workflow

This page regroups the various cases for which the workflow is going to send an email to one or several user(s).

How to recieve emails

- These emails will only be sent if the related users checked the box **" Notification by email "** in their preferences
- The SMTP parameters must be correctly configured in the administration.

Event	Email recipient
New document pending in a workflow task	User in charge of validating the document
Exiting document from the workflow due to **refusal**	• Workflow supervisor • User to notify selected in the workflow configuration (Preferences Management)
Exiting document from the workflow due to **approval**	• Workflow supervisor • User to notify selected in the workflow configuration (Preferences Management)
A **user** validates a task and chooses a user or a group to notify	The user or group chosen during the task approval.

Notes on the behavior of the Workflow

Some particularities of the KOMI Doc workflow engine:

- A single folder cannot be monitored by two workflows.
- Priorities in triggering workflows initialized by "directory" and by "Filing categories": in case if a document can triggers a workflow by "directory" and a workflow by "Filing categories", it is the workflow by"directory" that will be triggered.

The triggering of workflows activated by the addition of a document in a KOMI Doc folder, is therefore having priority on the triggering of workflows activated by the filing category.

Example:

-
    - The workflow 1 is activated during the document filing in the folder "supplier invoices"
    - The workflow 2 is activated during the filing of PDF type documents.

When adding an invoice in PDF format in the folder "Suppliers invoices", the two workflows are eligible to process this document.

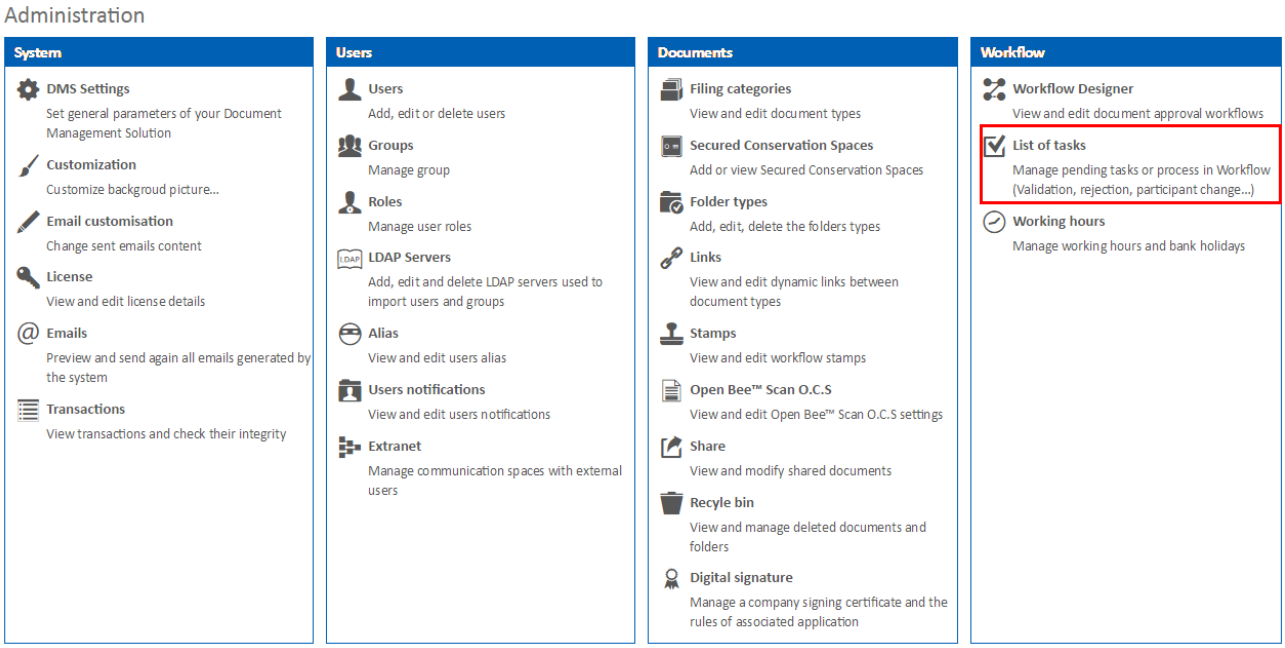
In practice, it is the workflow 1, triggered by the addition of a document in a "directory" wich will be applied.

- Moving a document already processed by a workflow in a subfolder monitored by this workflow will not re-trigger the validation process.

- For performances reasons the following limitations are applied:
    - a maximum of 10 workflows can be created in KOMI Doc
    - a maximum of 10 tasks/transitions can be created in a workflow

Workflow list of tasks

Click on "**Administration"** \ "**Workflow**" \ **"List of tasks**"



This screen allows to visualize and edit all processing or completed tasks in the workflows.

> This same screen is also accessible from the "**Workflow**" \ "**List of tasks**" menu.

It is possible to sort all the columns. Some columns also allow a filter to view the tasks assigned to a particular user.

Column description:

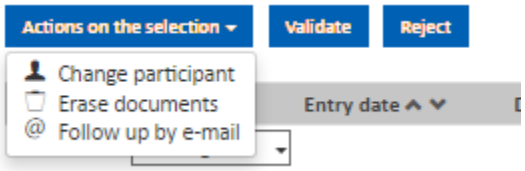
- **Status:** "Pending", "Overdue task(s)", "Approved" or "Rejected". By default, the "Pending" and "Overdue tasks" are displayed
- **Entry date:** date the task was assigned
- **Deadline:** remaining time before the task is overdue
- **Name:** the name of the workflow to which the task belongs
- **Tasks:** the task name. If the connected user is the task participant, he can click on the task to display the detailed view.
- **Participant:** person in charge of the task.
- **Document name:** name of the document having triggered the task. Click on the document name to open a preview in a pop-up
- **Filing category:** Filing category with which the document that triggered the task was filled.

- **Metadata:** metadata associated to the document. To keep low heights lines, only the first two metadata are displayed. Click on the arrow to display the other metadata.
- **Comments:** number of comments related to the document. Click on the number to view comments and add new ones.

By selecting a filter on a filing category or the name of a workflow triggered by a filing category, columns corresponding to the metadata category are added. This allows you to sort the tasks on metadata values.

The **"Validate"** and **"Reject"** buttons allow to process tasks in batches. Only tasks assigned to the connected user can be processed.

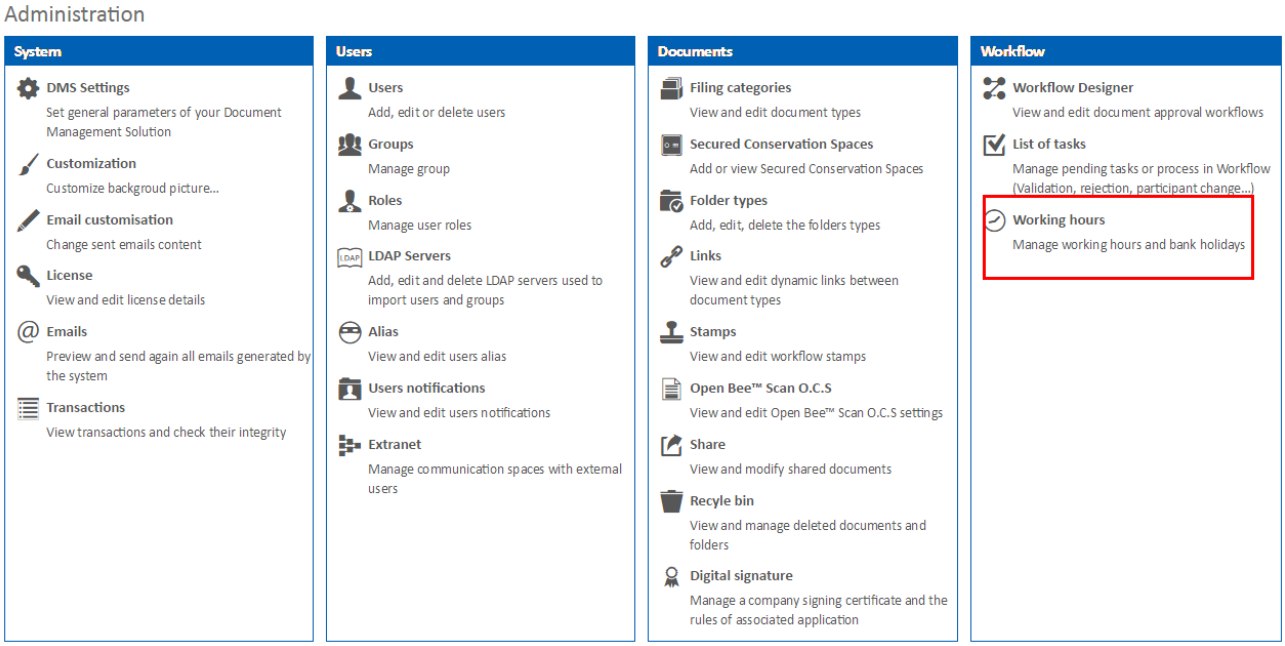
The **"Actions on the Selection"** button allows operations on several tasks at the same time:



- **Change participant:** You must first change the participant in the "Participant" column for the changes to be applied.
- **Erase documents** : the documents will exit the workflow with the "Rejected" status.
- **Follow up by e-mail:** selected tasks participants will recieve a follow up e-mail

Working hours

Click on "**Administration**" \ "**Workflow**" \ "**Working hours**"



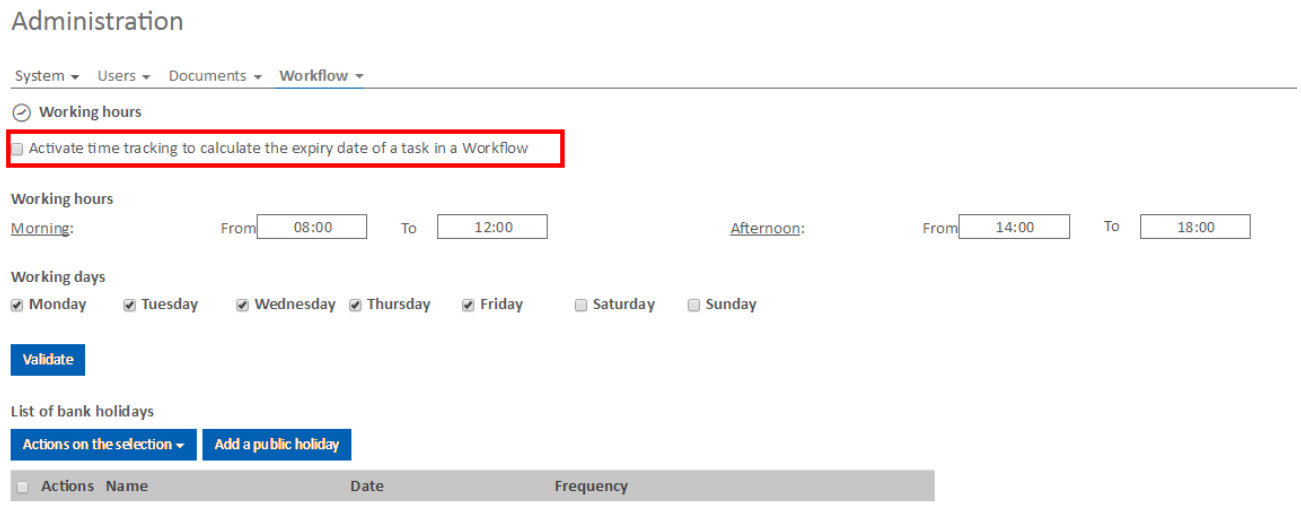
This function allows to specify the company's working hours and days. It allows to only count the actual working time in the workflow's task duration calculation.

Thereby a task assigned on Friday at 6:00 pm, with a delay of one day will not be marked "Overdue task" on Monday morning.

- Activate time tracking
- Modify the working hours and days
- Add and modify holidays

Activate time tracking

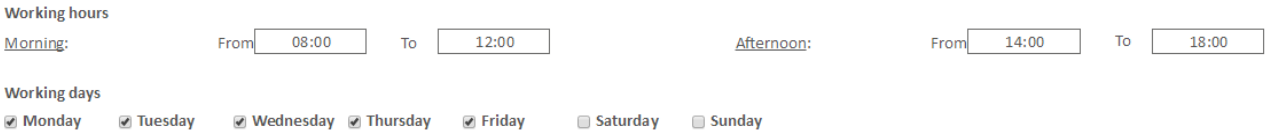
First, check the "Activate time tracking to calculate the expiry date of a task in a Workflow" box :



Click **"Validate"** to apply your modifications.

Modify the working hours and days

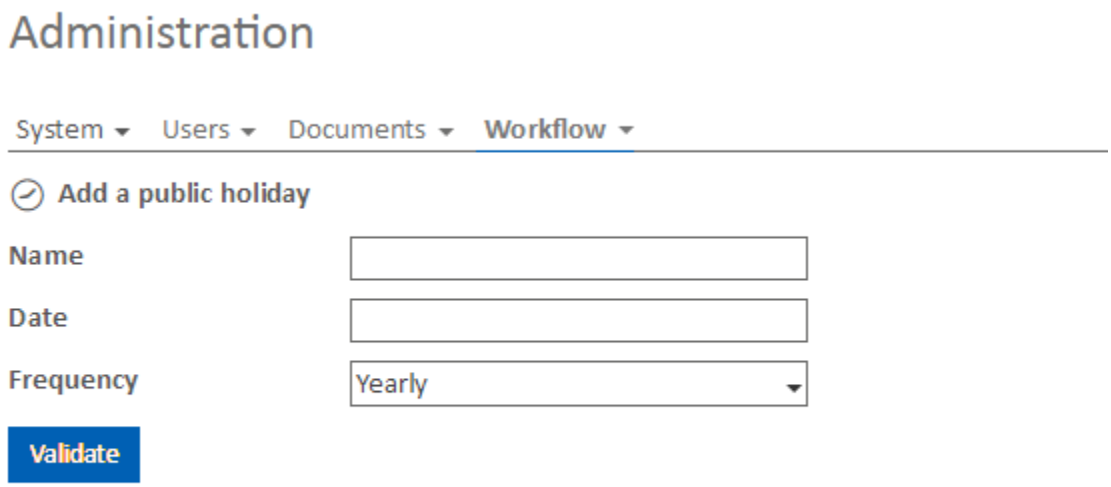
The default values are 8:00 to 12:00 and 2:00 p.m. to 6:00 p.m., Monday to Friday. The following form appears and can be changed.



Click **"Validate"** to apply your modifications.

Add and modify holidays

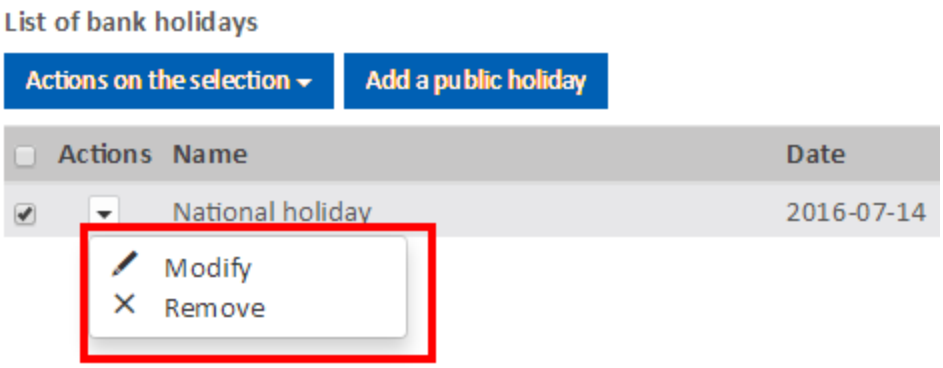
Click on the "**Add a public holiday**". The following form appears:



Give a name and a date to the holiday, and possible recurrence.

Click **"Validate"**

To modify or delete a holiday, use the associated menu:



In case of a modification, the same form as creation is displayed.

It is also possible to perform batch deletions using the menu **"Actions on the selection".**

User guide

Login to the software

Login as administrator

To launch KOMI Doc, follow one of the procedures here under :

- In the menu « Start \ All programs \ Konica Minolta \ KOMI Doc »
  OR
- Launch the Internet browser and enter the following URL: http://xxx.xxx.xxx.xxx:yyyy where xxx.xxx.xxx.xxx corresponds to the IP address or to the server name and yyyy to the port on which KOMI Doc has been installed.

KOMI Doc is installed by default on the port **8000** under Windows and **80** under Linux

The KOMI Doc login page appears

↑

Choose the language

Several languages are available as soon as logged in. By default the language of your browser is pre-selected. You can also choose another language in the bottom left of the screen.
Besides French and English , the following languages are available:

- German
- Dutch
- Italian
- Portuguese
- Spanish
- Simplified Chinese
- Traditional Chinese
- Japanese
- Korean
- Arabic

Language change : The language can be changed on all the application's pages. The drop-down menu is at the bottom left of the page. To change the language, simply select the language. It will be immediately taken into account and will change automatically.

Enter the username and password and click on **" Login "**

The KOMI Doc dashboard opens, all relevant informations are accessible (documents to be filed, folders to be completed, Shared documents / folders pending for approval, reminders, notifications, documents and favorite folders, as well as the latest searches and recent documents).

By default:

- Administrator account : **admin**
- Administrator password **: admin**

Log in as user

In order to log in KOMI Doc, launch your Internet browser and enter the address that was communicated to you by your network administrator:

For example : http://192.168.5.97:8000http://192.168.5.97:8000/

The following window opens, asking you to enter your username and password:

Log in with the username and password provided to you by your administrator and click on **"Login"**

You are now logged in KOMI Doc.

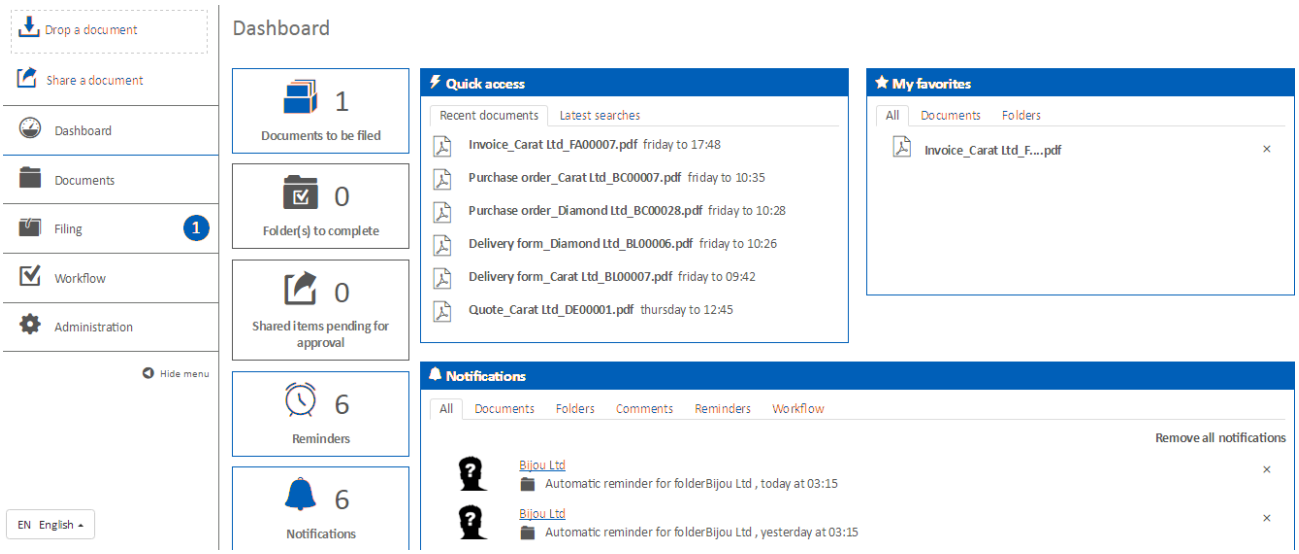
The directories that appear are those which you have access to, either as single reader or with advanced permissions.

Note: Entering the username and password is case-sensitive (upper / lower case). Make sure that the "SHIFT" key is not activated before entering the information.

In case of prolonged inactivity during a session, the **"session expired"** message appears, the username and password must be entered again from the login interface.

Dashboard

Once properly logged in, you arrive on the dashboard or home page :



This interface allows you to access the following features:

- Documents and folders exploration
- Documents search (simple / advanced search)
- Quick access to documents and / or folders from the **"My Favorites"** window.
- Notifications on documents and folders (The user can subscribe to a folder to be automatically notified when the subfolders and documents it contains are modified).
- Notifications on the discussions to which the logged in user contributed

Different dashboard sections

"My favorites"

You will find in this window all the documents and folders you've added to your favorites.

You can simply access these documents and folders from this window by clicking on it.

"Quick access"

"Recent Documents" : list of documents and folders recently modified (Amendment, addition).

"Latest searches" : list of the latest documents searched.

"Notifications"

"**Documents"** : notifications triggered when actions are performed on the documents in a parent folder to which the connected user subscribed to.

The actions that trigger notifications are:

- Adding a document
- Modifying a document
- Deleting a document
- Adding a new version of a document
- Modifying an existing version
- Deleting a version
- Copying a document
- Moving a Document

"Folders" : notifications triggered when actions performed on the documents in a parent folder to which the connected user subscribed to.

The actions that trigger notifications are:

- Adding a folder
- Modifying a folder
- Deleting a folder
- Moving a folder

"**Comments"** :contains notifications triggered when adding a comment to a discussion thread to which the connected user has contributed.

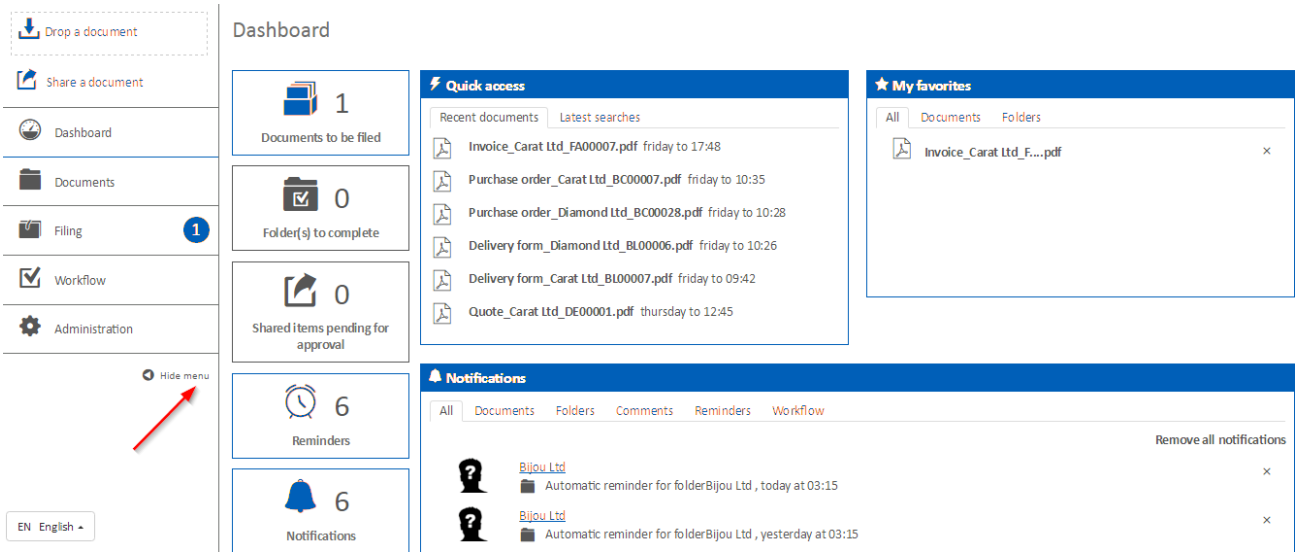
"**Reminders"** : contains all the documents to which you added a reminder.

"**Workflow**" : provides access to all the documents present in a workflow which you are associated to.

You will also find in the dashboard:

- the overdue and current tasks
- the number of documents to be filed
- the number of folders to complete
- the number of reminders and the number of notifications

Simply click on one of the tiles to automatically be redirected to the corresponding page.



By clicking on **"Hide menu"** you can hide the left column to navigate more easily on your dashboard

Documents

- The filing categories
- Files and documents view mode
- Documents access permissions
- Actions on the document
- Actions on the folder
- Actions on the selection
- Favorites management
- Notifications management

The filing categories

A *filing category* allows to define metadata associated to documents. A *filing category* is always associated to the same metadata.

Example: The ***Supplier invoice*** *filing category* has these metadata: ***amount, supplier, date***. For each document with the ***Supplier invoice*** type, values for these three metadata may be associated.

The stored documents in KOMI Doc are all associated to *a filing category*. It is defined when archiving the document.

If the documents were archived in KOMI Doc via KOMI Scan, then the *filing category* will correspond to a KOMI Scan *filing category*.

If the documents were archived in KOMI Doc via KOMI ERP Manager,then the *filing category* will match the *document type* into KOMI ERP Manager.

If the document was archived manually or imported, it is the user who determines the *filing category* when adding the document. If he does not define a specific *filing category*, the "default" category will then be used.

Files and documents view mode

The « Documents » interface

KOMI Doc uses metadata and flexible documents filing structure, in the form of folders.

The KOMI Doc organization has been designed to allow users to access relevant documents depending on their profile and function, grouping them by group.

By default, the system is free of users and documents.

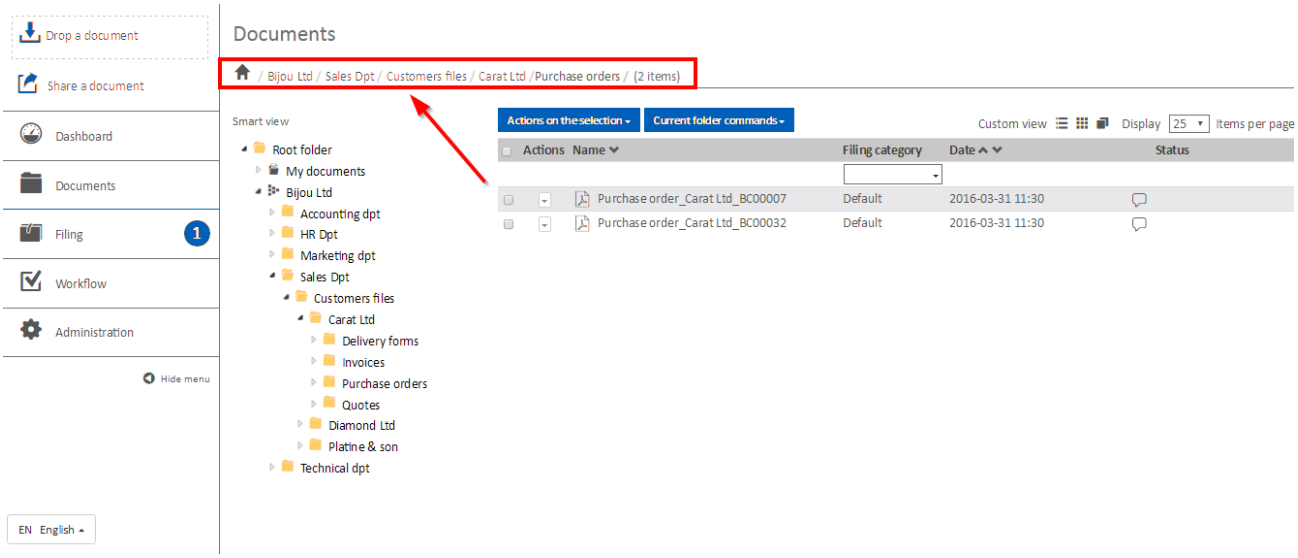
It is therefore necessary to follow the steps in this manual to add documents, folders and sub-folders.

> You can sort the files and documents by their names, by clicking on the arrows in the header of the list.

"Breadcrumb" navigation

The **"breadcrumb"** shows the folders / sub-folders tree structure to one or more document(s) from the root folder.

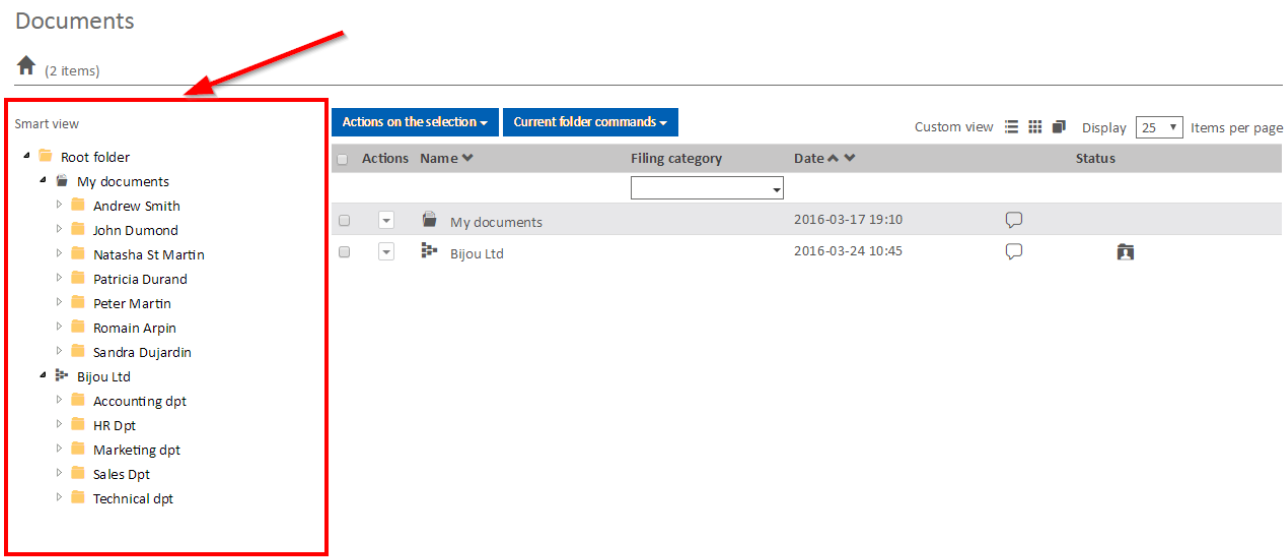
Example :



This navigation mode allows to move easily in the folder tree structure by clicking on the desired destination.

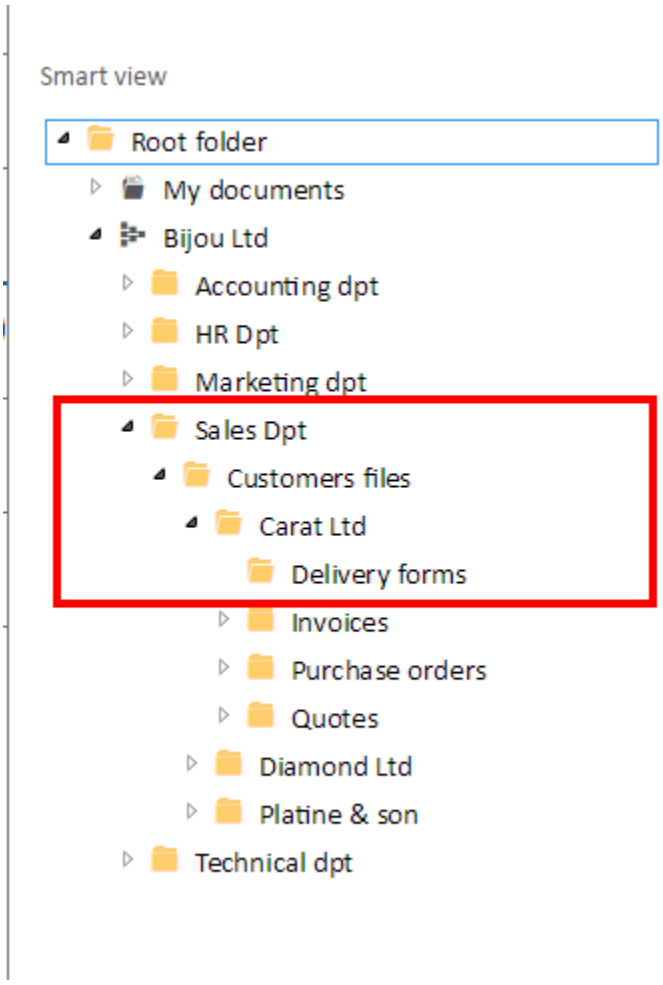
Smart view

The **smart view** navigation allows to display the folders and sub-folders list under a tree structure format to facilitate access to different levels.



To expand or hide the tree structure, just click on the icons " ▷ " and " ◢ ".

Example :

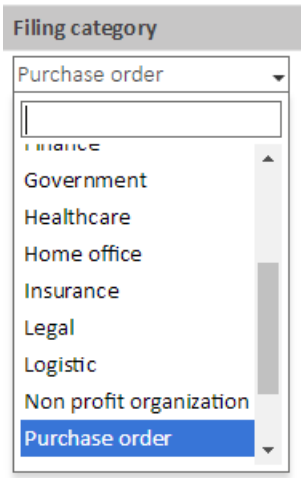


The display by filter

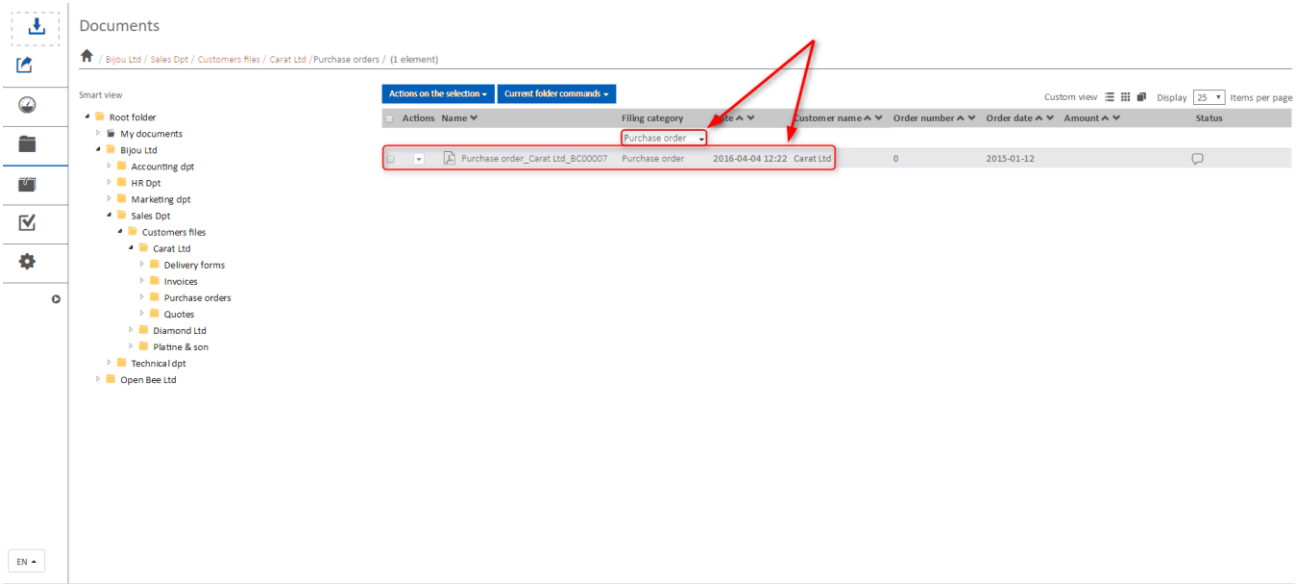
This feature allows to filter the documents display according to their type.
The name of a filter corresponds to the filing category name set from KOMI Scan.

Example :

A filing category "Purchase order" has been created from the KOMI Scan application.



If you select the filter "Purchase order" from the drop-down list, only the "Purchase order" document type will be displayed.



In this example, we only see the documents indexed with the "Purchase order" filing category existing inKOMI Scan.

The column headers (in bold) corresponds to the metadata created from KOMI Scan. The metadata values associated to the documents are displayed below.

Note : To disable a filter (back to the default display), just select **"No Filter"** from the drop-down list.

The 3 display modes in KOMI Doc

KOMI Doc provides the ability to view folders / documents in three different ways:

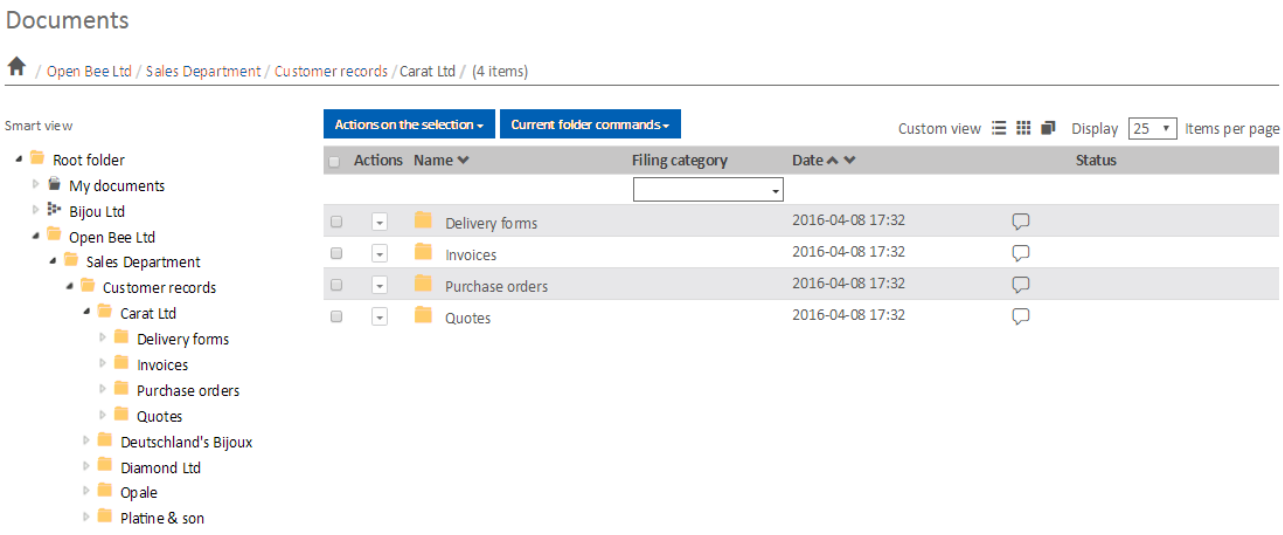
- Traditional display
- Thumbnail display

- «Documents slide» display

These display modes are described in the sections below:

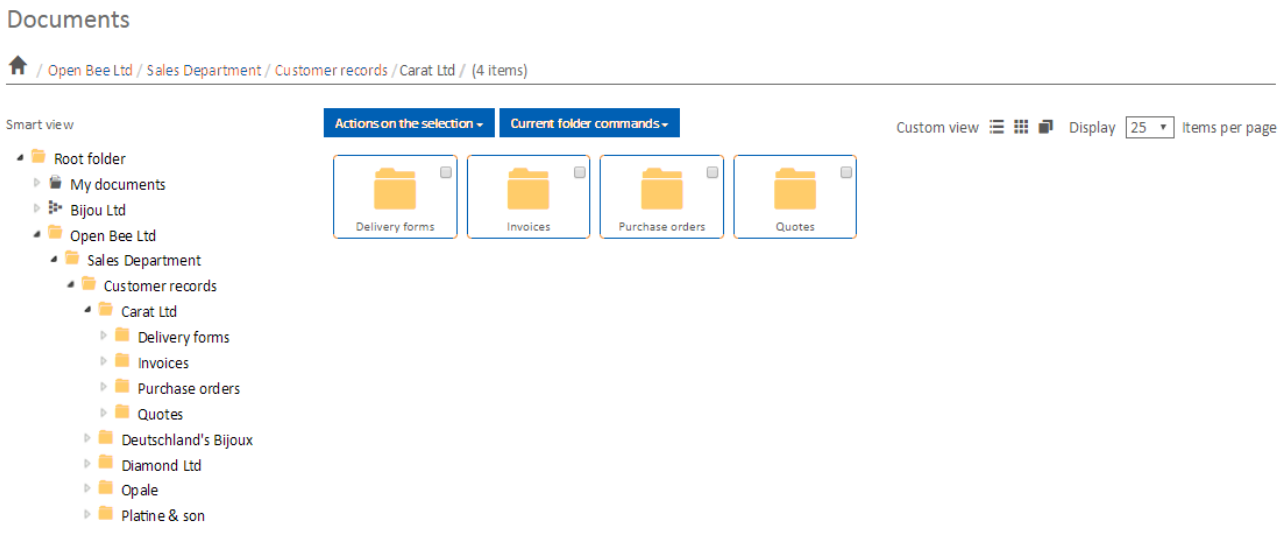
- **Traditional display**
-

The traditional display (or list mode), displays all the folders and documents present in the consulted folder, in list form.



- **Thumbnail display**
-

This view mode displays the folders / documents as thumbnails:

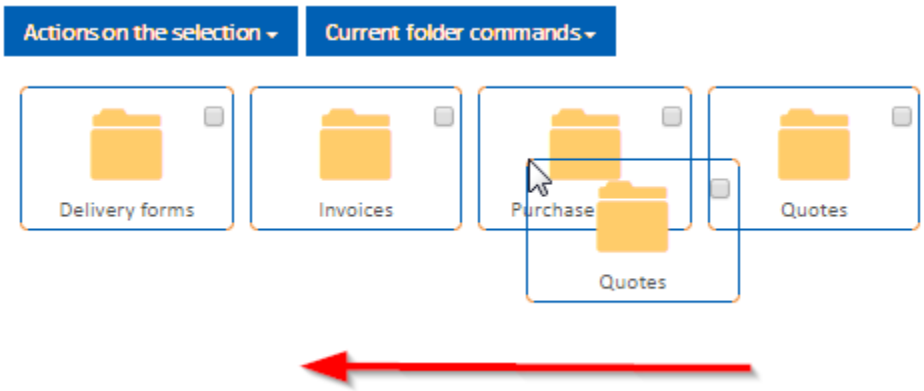


Thumbnails are automatically generated for document types such as gif, png, jpeg, jpg

Using this mode, the user can:

- Move items (folders or documents) by a simple drag / drop to the folder of his choice.

Example :



- Open a folder or download a document by double-clicking it.
- **« Document Slide » display**
-

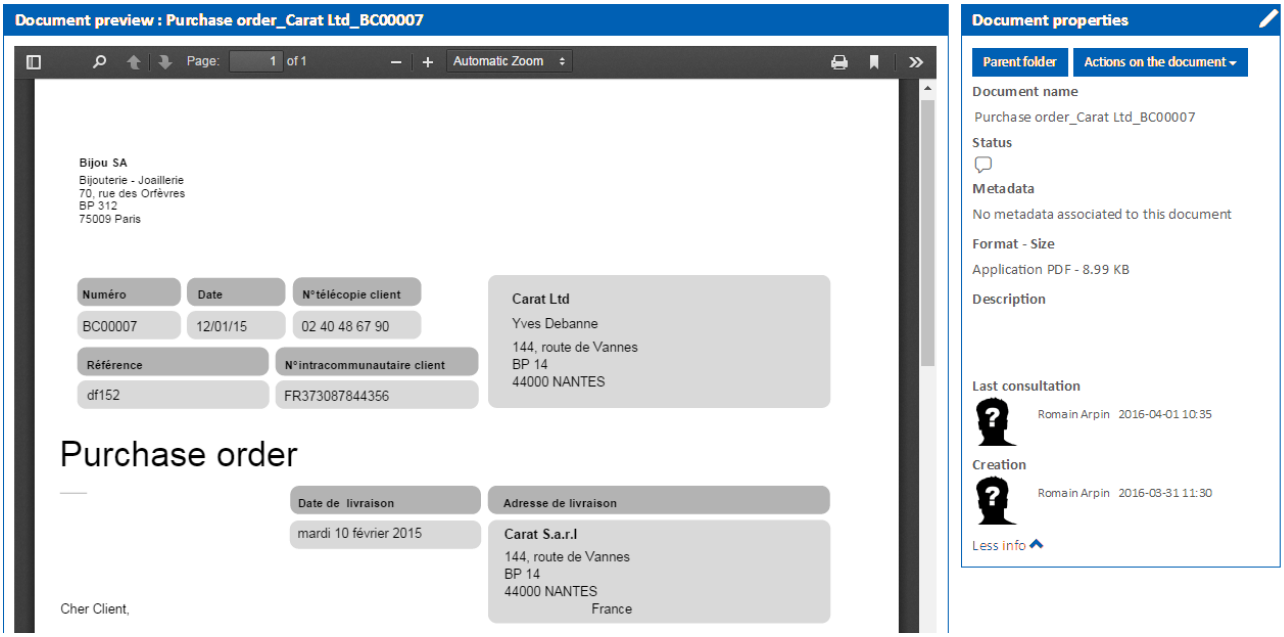
This display mode allows you to view folders and documents as icons or thumbnails.

You can scroll through the images as a slide show with the mouse cursor or the left / right arrows on your keyboard.

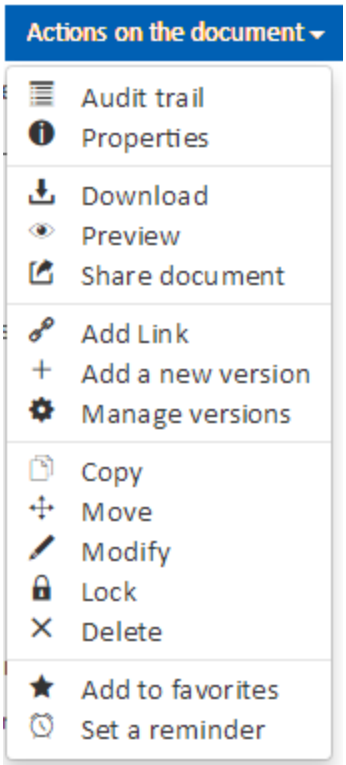
This display mode is particularly useful for scrolling and / or viewing pictures.

Preview a document

When you click a document from the different views or from a search result, a document preview screen appears.

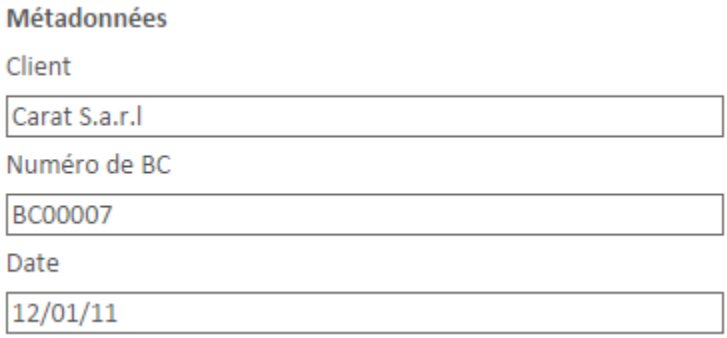


- The document preview is available for PDF and image documents.
- The **"Parent folder"** button allows you to navigate in the document's parent folder.
- The **"Actions"** button provides access to all possible actions on the document:



- The toolbar displays the status of the document (favorites, status in the workflow, comments ...)

- It is possible to edit the document metadata thanks to the metadata form



MS Office documents filed in KOMI Doc are available for consultation directly from the software interface thanks to **KOMI Scan OCS** . You can preview but not edit them.

The user can only edit the metadata if he has the "Change" permission on the parent folder of the document.

The metadata are automatically saved when editing.

Documents access permissions

KOMI Doc permission system unables to limit access and features available on documents depending on the user.

Prenons les utilisateurs suivants pour illustrer les différents fonctionnements du système de permissions :

Let's take an example :

- Admin : "Administrators" group member
- Natasha : "Marketing" group member
- Patricia : "Sales" group member

Permissions when a folder is created

When a folder is created, the folder creator is the only one who can view it

> *Elle sera la seule à le voir.Natasha creates the Marketing folder, she will be the only one to view it*

But admin group members can access all folders and documents, whereas Patricia can't.

> *Admin can view the folder created by Natasha, whereas Patricia can't.*

If you wish to hide some folders to the "Administrators" group members, view the Digital Safe Box section.

Documents permissions

Permissions apply at the folders level. Documents have the same permission that the folder they're stored in.

> *When Natasha adds a document in the Marketing folder, all users who can view the marketing folder can view the document she added.*

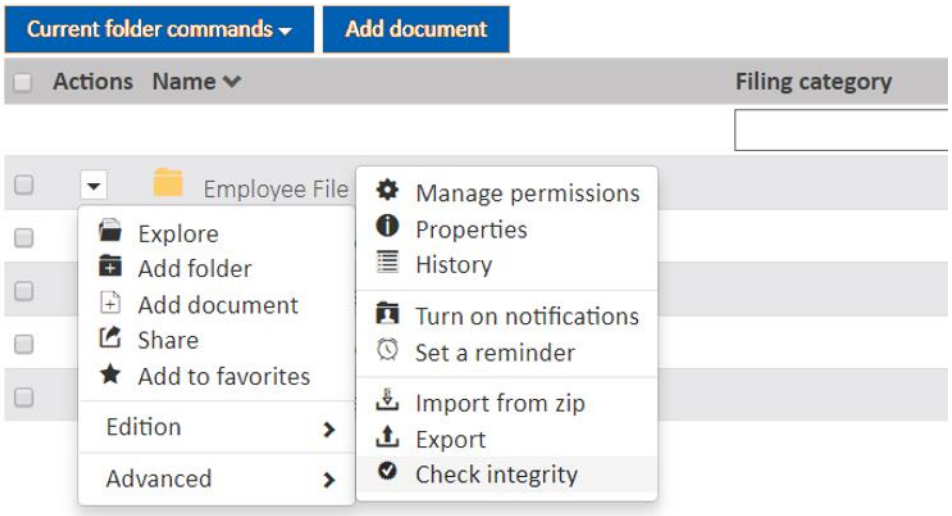
Change permissions

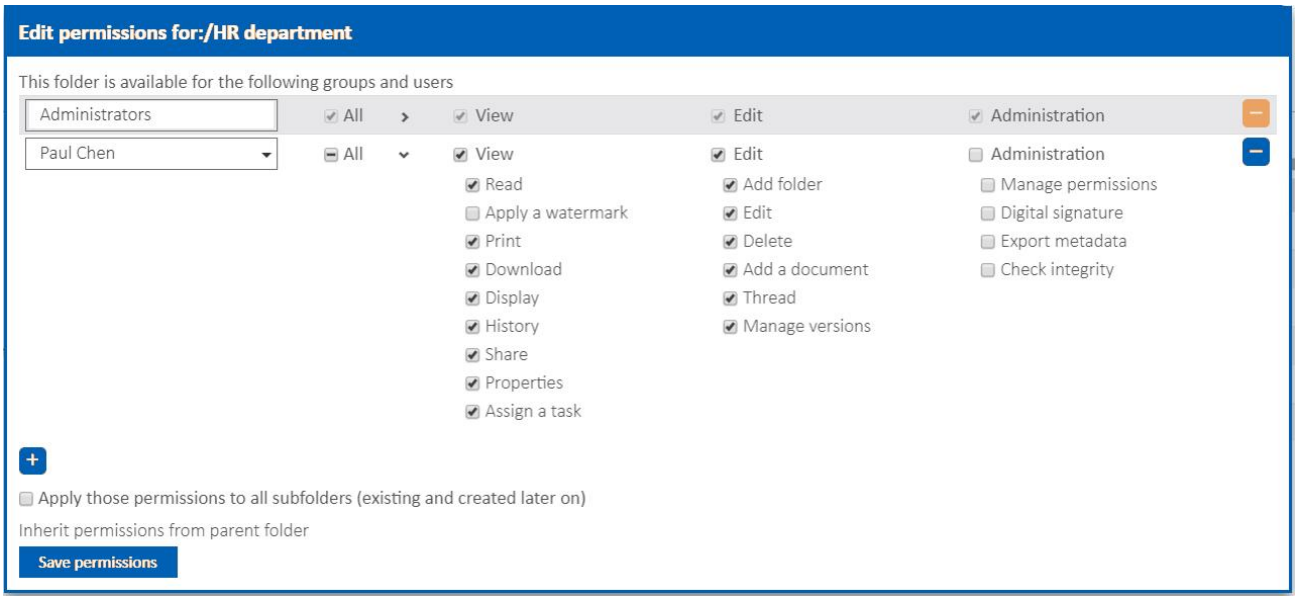
> *Natasha wishes to give access to all the sales persons to the Marketing folder.*

Permissions on a folder can be changed in the menu "Action on the folder". It is then possible to give access to the folder to more users or groups. To change the permissions to a folder, the connected user must have the "Manage permissions" permission on this folder !

As for the view permission, the folder creator and the Admin group have this permission by default.

> *Natasha will add permission to the "Sales" group with a "View" only permission. Patricia will then view the Marketing folder.*





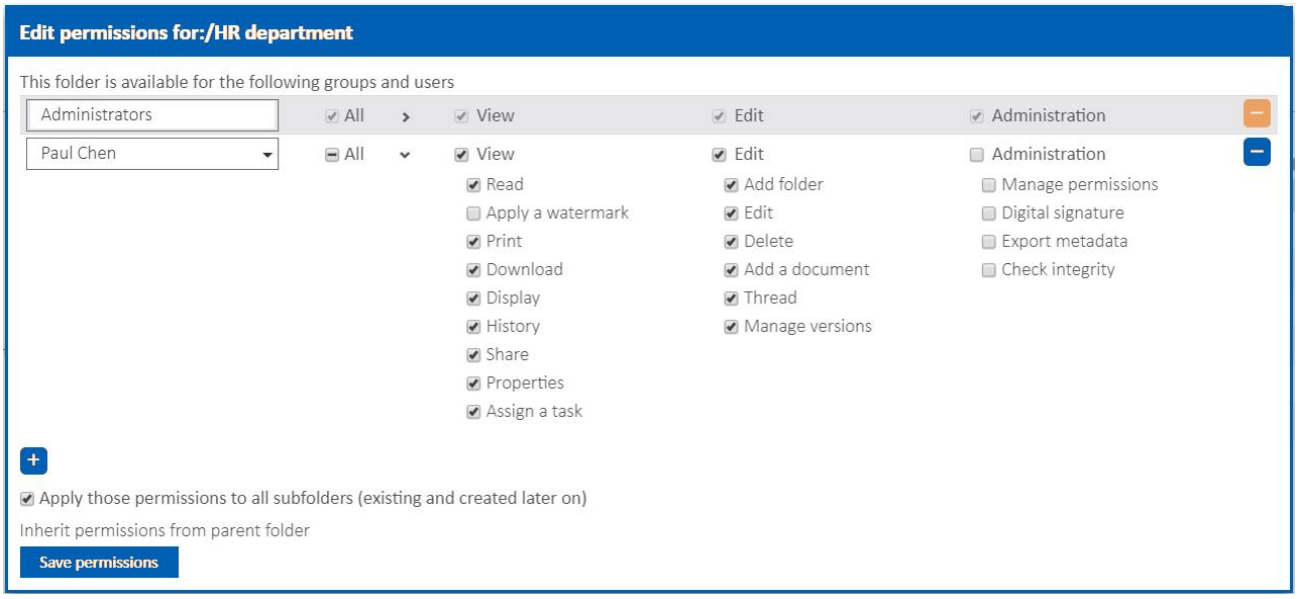
Even if KOMI Doc enables to manage permissions per user, we strongly recommend to use the groups in the permission definition. The use of group enables an easier maintenance when changes are made on your document management system lifecycle.

Permissions inheritance

> *Natasha then creates a subfolder "Prices" in the Marketing folder and drops document in it. She thinks Patricia can access it but she won't be able to.*

When a folder is created, the folder creator is the only one who can view it (with the administrators). This behavior is perfect to ensure that a user won't give access to a folder to other users without noticing. But it is then complicated when you wish to give access to an entire folder tree without redifining permissions at each folder creation. The permissions inheritance enables to fix this issue by applying the parent folder permission to all created folders.

> *Natasha will then update the Marketing folder permissions by clicking the checkbox "inherit permissions".*



Permissions details

View permissions

- View : access to folders and documents
- Preview : view the document in KOMI Doc
- Print: print documents from KOMI Doc
- Upload : get a document copy
- Watermark : a digital watermark including the connected user name will be displayed on the document
- History : view all the actions operated on documents

Editing permissions

- Add folder : create folders and subfolders
- Change : change name and folder properties, also enables to comment the folder and documents
- Delete : delete folders or documents
- Add document
- Manage versions : change or delete different documents versions

In order to be able to move a document a user should have the deletion suppression on the parent folder and the add folder in the target folder.

Administration permissions

- Manage permissions : change a folder permissions
- Digital signature : enables to sign electronically documents with the company server certificate

- Export metadata

Permissions & API

All the calls made from the API require that you identify with a KOMI Docuser account.

Documents and folders returned by the API are only visible for the user used during the API calls.

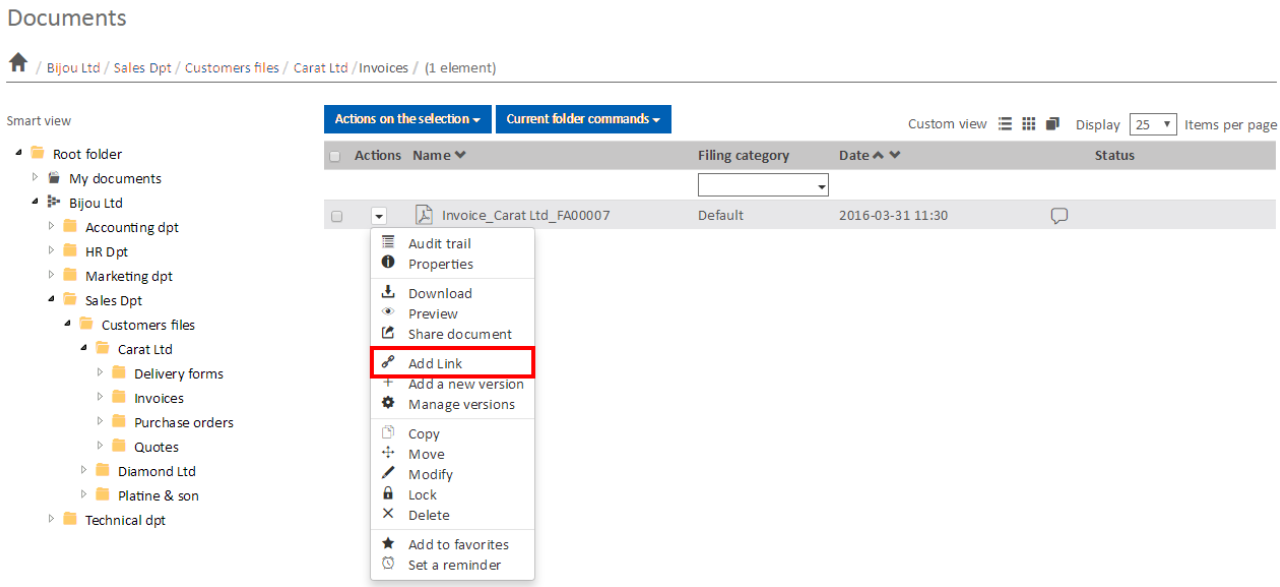
Actions on the document

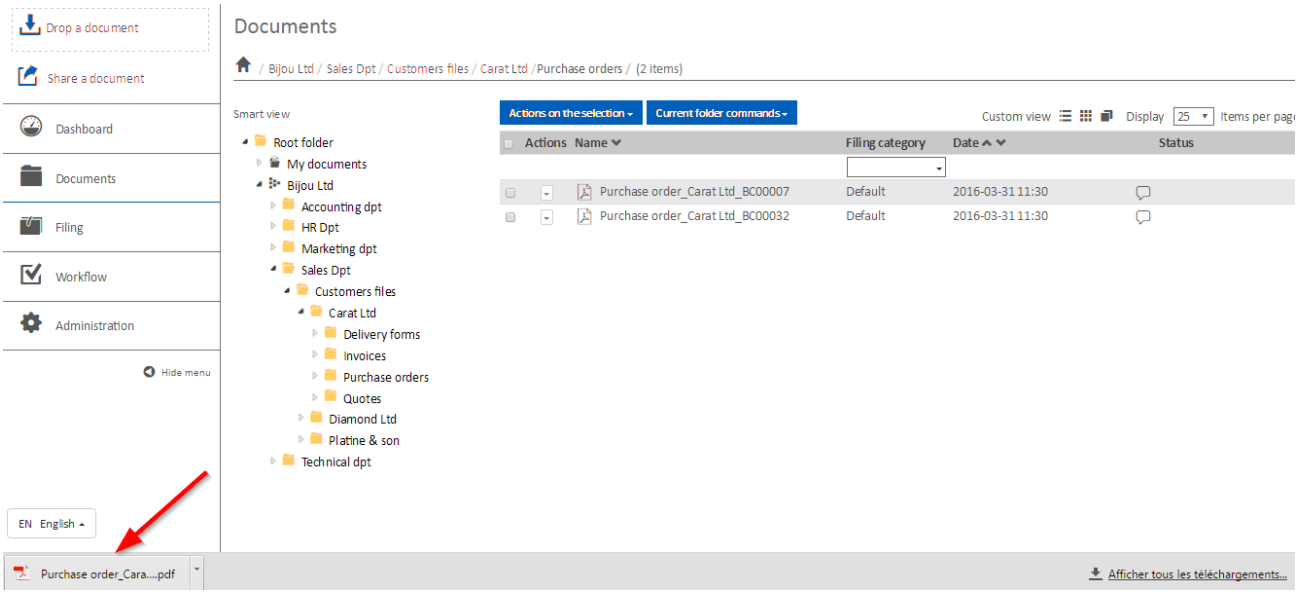
- Downloading
- Preview
- Send and share
- Audit trail
- Properties
- Manage versions
- Add a new version
- Copy
- Move
- Modify
- Edit online
- Delete
- Add link
- Lock
- Add to favorites
- Set a reminder
- Add a comment

Downloading

This feature allows to save the document on your computer.

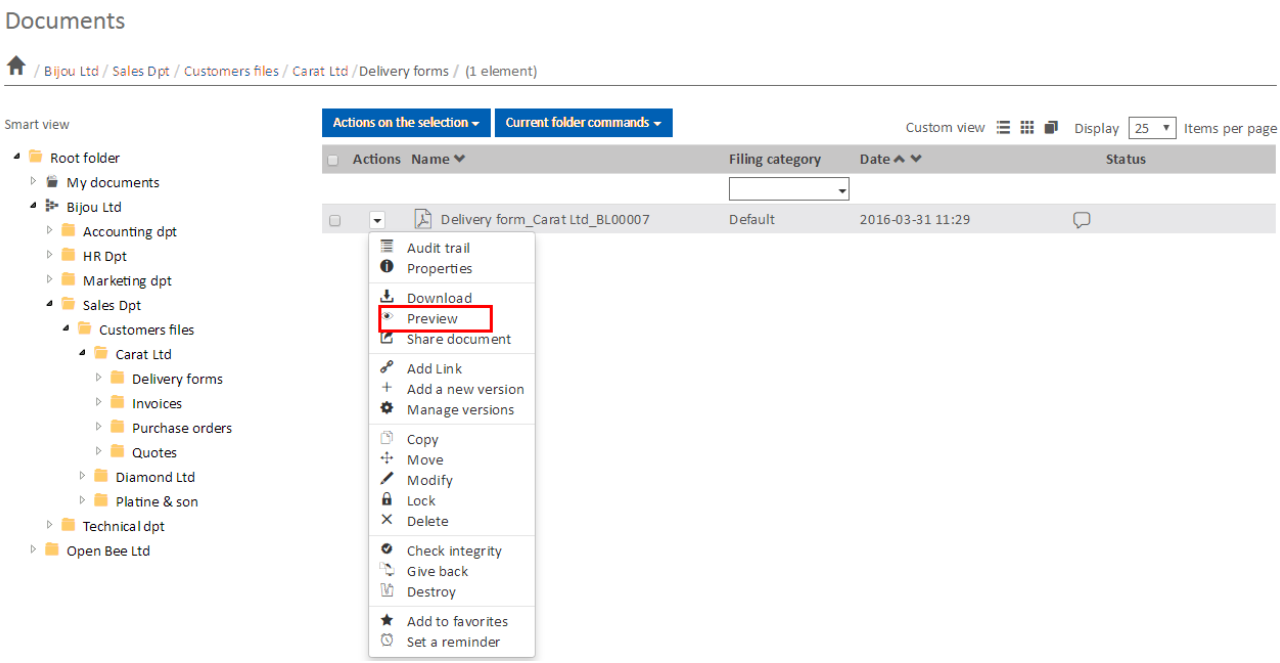
Select the document, then click **"Download"** in the menu.

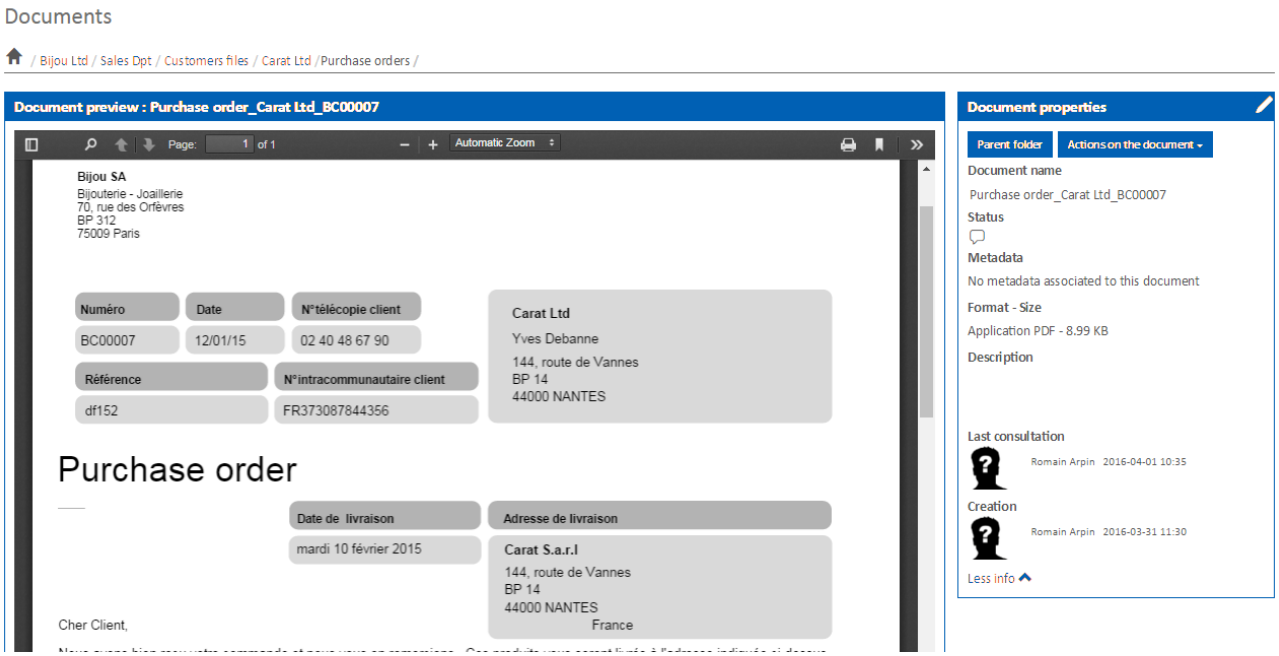




Preview

This feature lets you view your documents without having to download them first.





Send and share

Share documents and folders

Audit trail

Documents and folders history

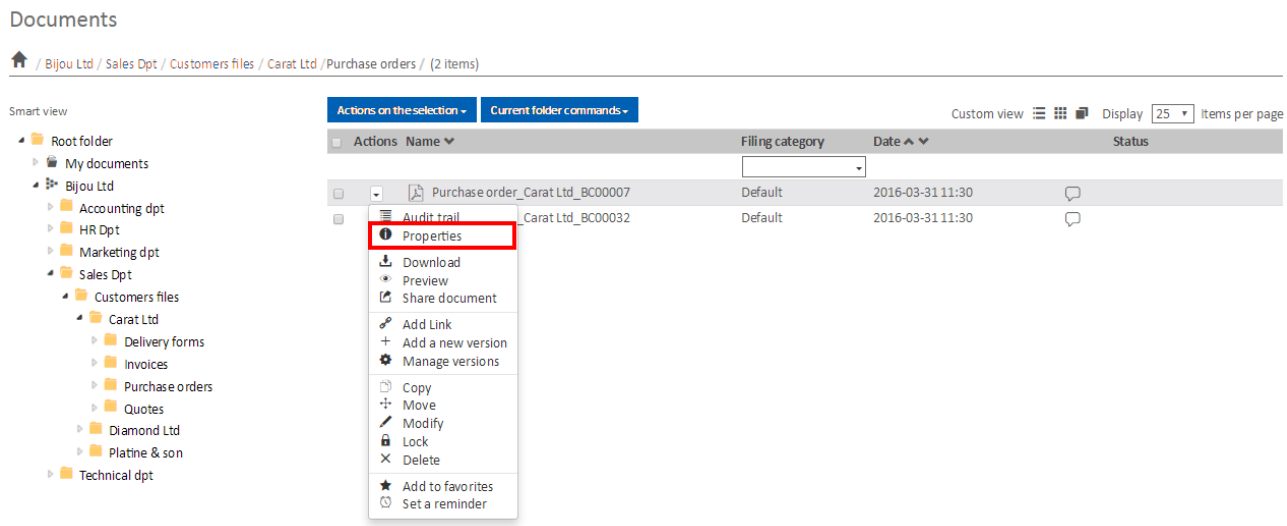
Properties

This feature gives you the ability to view information related to the document:

- ID: unique document identifier
- Path: Storage document path in the KOMI Doc tree structure.
- Description
- Creator
- Creation / modification date
- File path : Storage path on the file server associated to the document
- Document size
- Document type

To access the properties, select the document and click **"Properties"** from the drop-down menu.

The following window appears and gives you all the document information.



Document properties

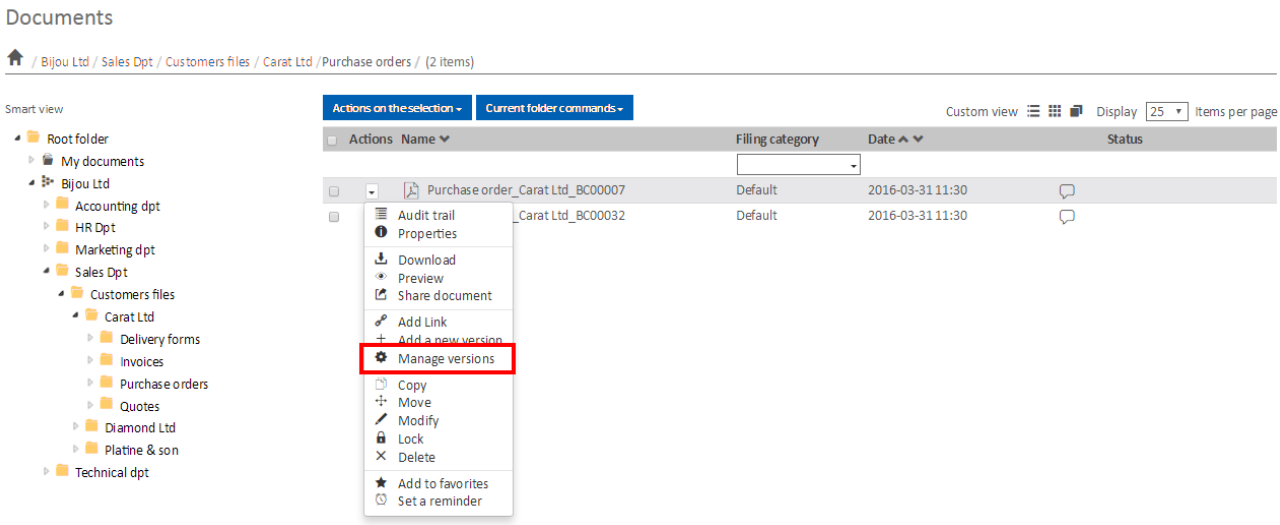
Document ID : 29
Path : /Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/
Description :
Created by: Romain Arpin
Created on: 2016-03-31 11:30
Modified on: 2016-03-31 11:30
File path: /var/www/vhosts/userguide-en.openbeecloud.com/httpdocs/data/Documents/00/3
File size: 8.99 KB
Filing category: Default
Md5: 509c705441fd70f86aaaa7a42f482303
Sha256: fc344b845604b0ac2354aa66c7292c179026b7090e248ce2d08c9f9c45fad488

To delete an item, you must:

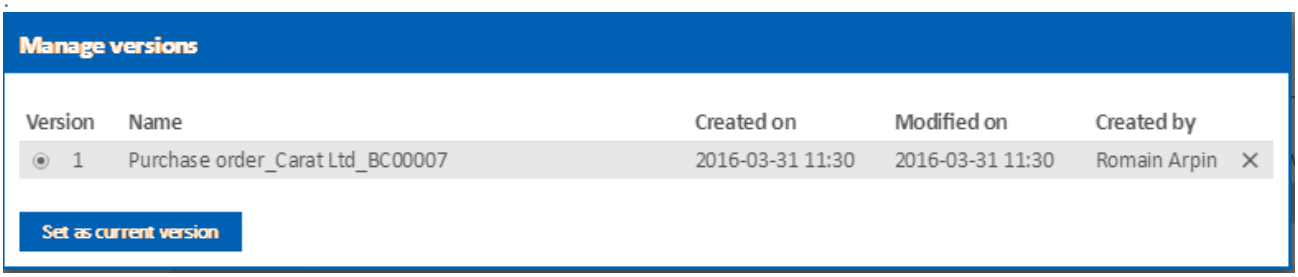
- Select the document and click **"Delete"** from the drop-down list.
- A message appears asking to confirm the deletion. Click **"OK"** or **"Cancel"**.
- Once the document is deleted, a confirmation message appears.

Manage versions

This feature lets you view the version history of a document and change the current version.



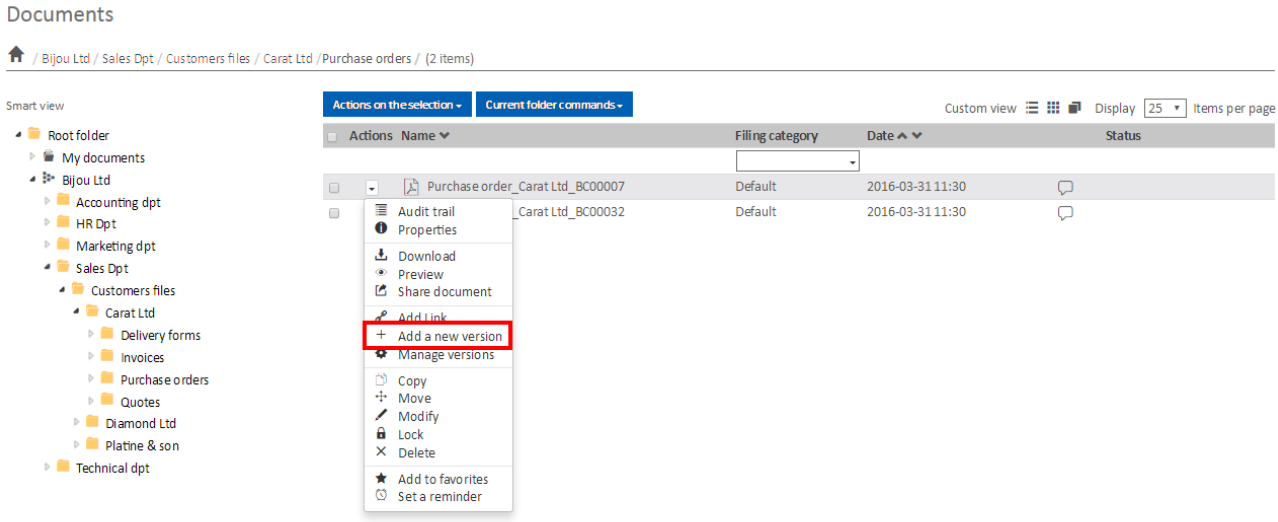
The document different versions' list appears:



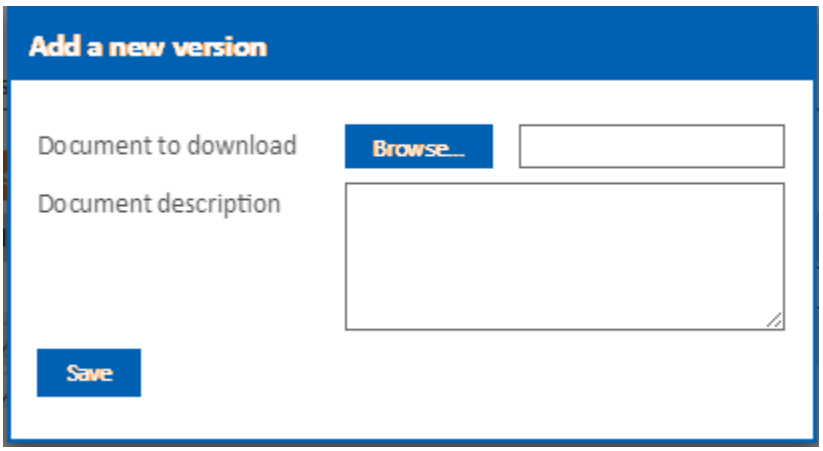
- Choose the version you want to use as current version
- Select it by checking it (Version column)
- Click **"Use as current version"**

Add a new version

This feature adds a new version of a document.



You can then choose a new file on your computer:

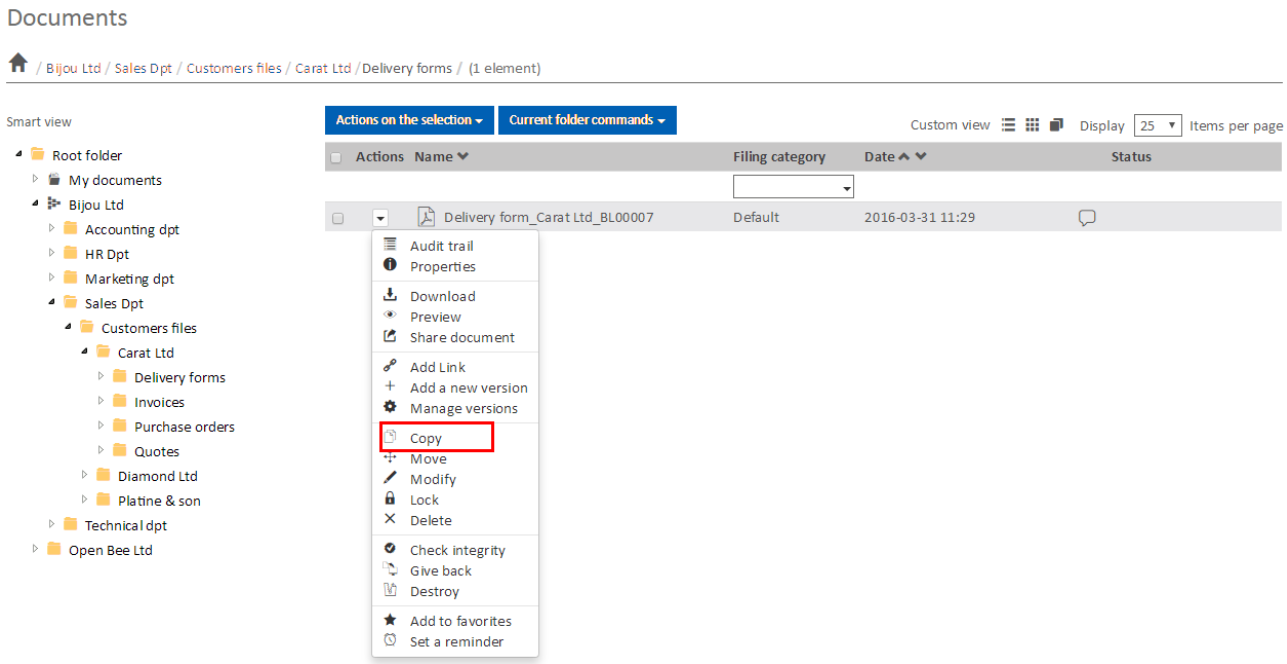


Once saved, this file will become the current version.

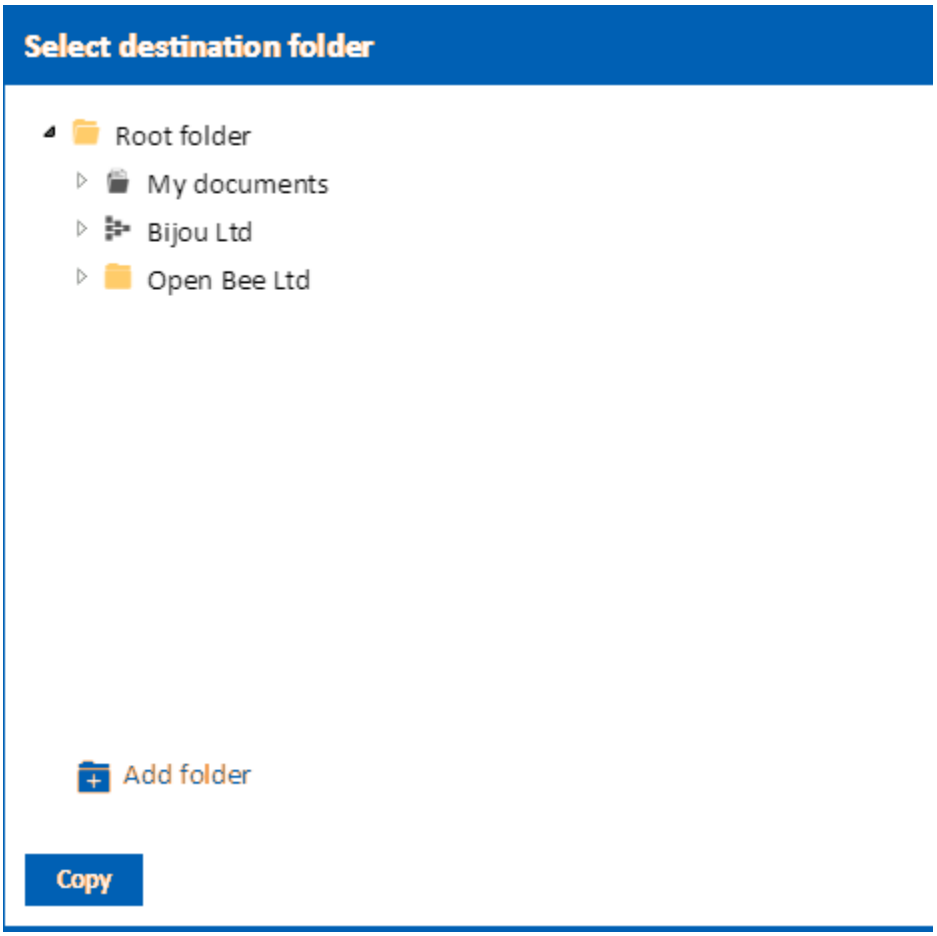
Copy

This feature provides the ability to make a copy of a document in a folder of your choice.

- Select the document,
- Click **"Copy"** from the drop down list.



- Choose the destination folder in which you want to copy your document
- Click on **"Copy."**

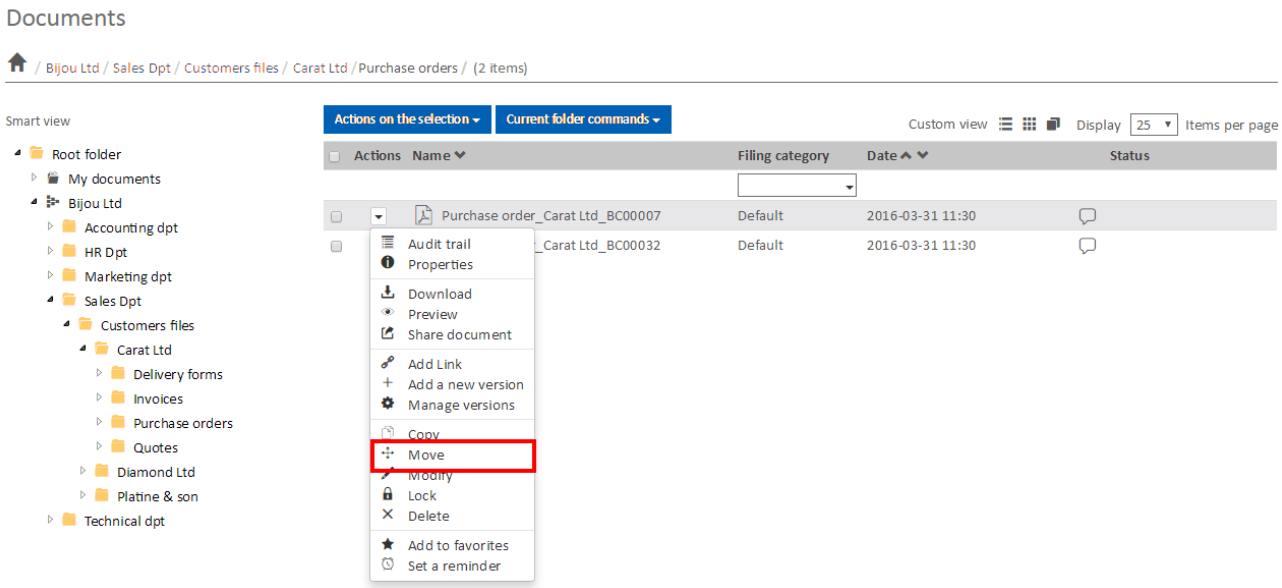


A confirmation message indicates that your document has been copied successfully.

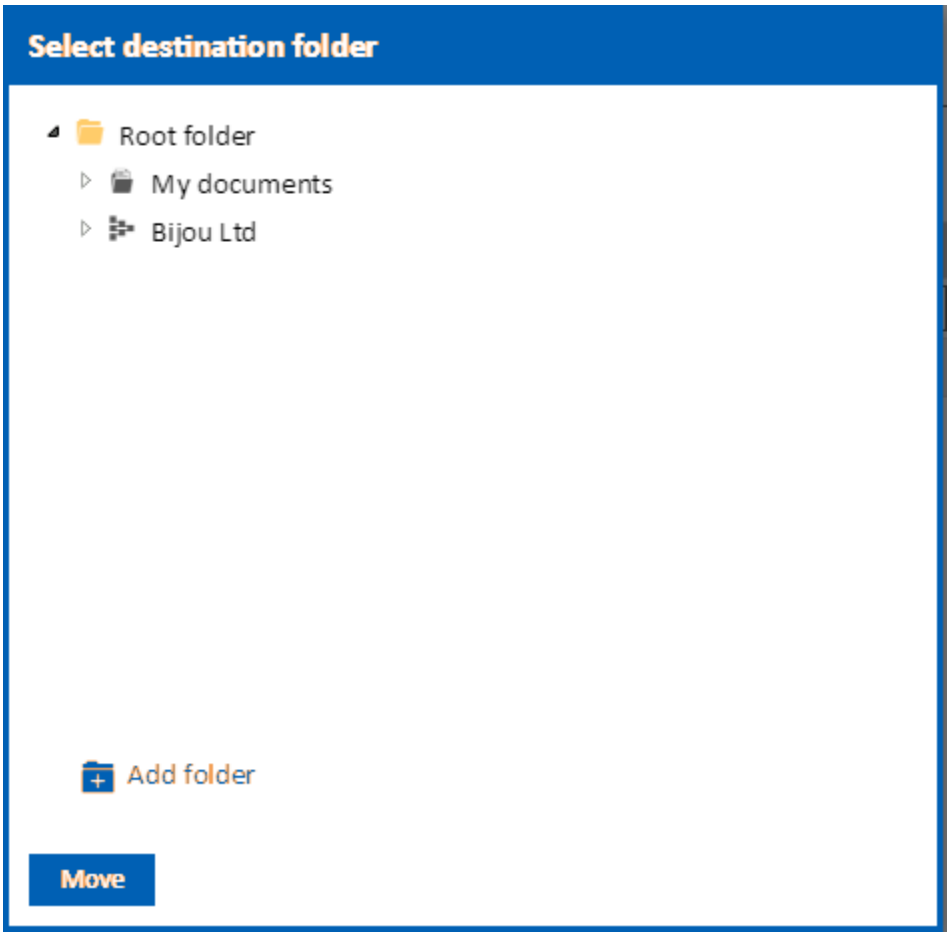
Move

This feature provides the ability to move a document to another folder of your choice.

- Select the document,
- Click on **"Move"** from the drop-down list.



- Choose the destination folder in which you want to move your document
- Click on **"Move"**.



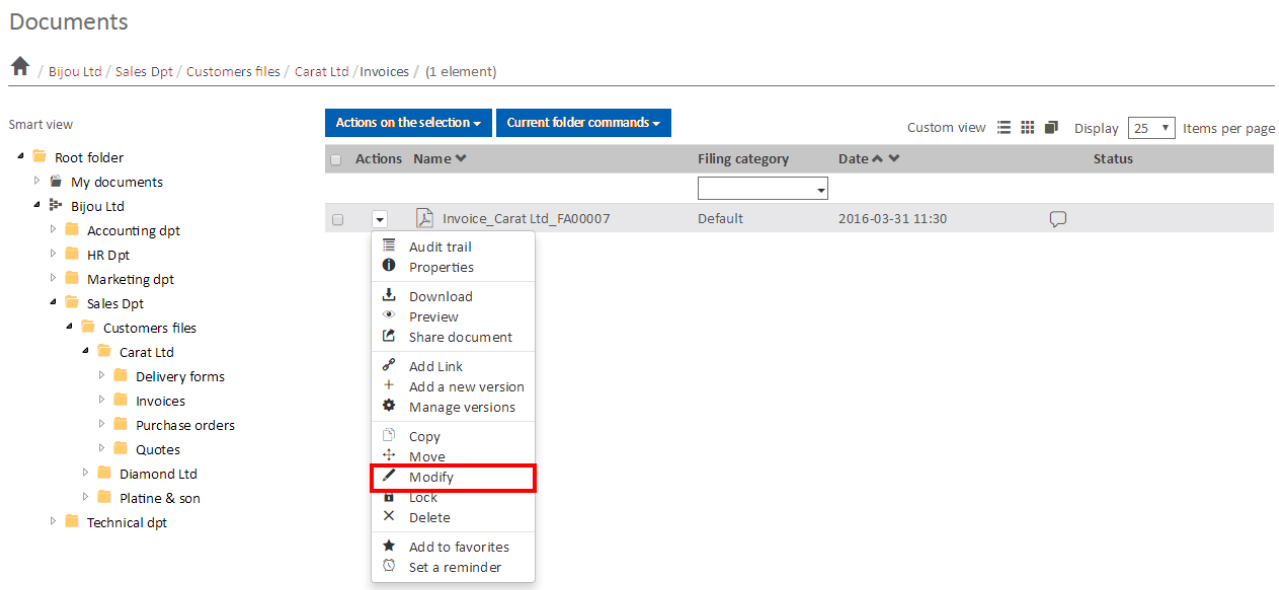
A confirmation message indicates that your document has been moved successfully.

Modify

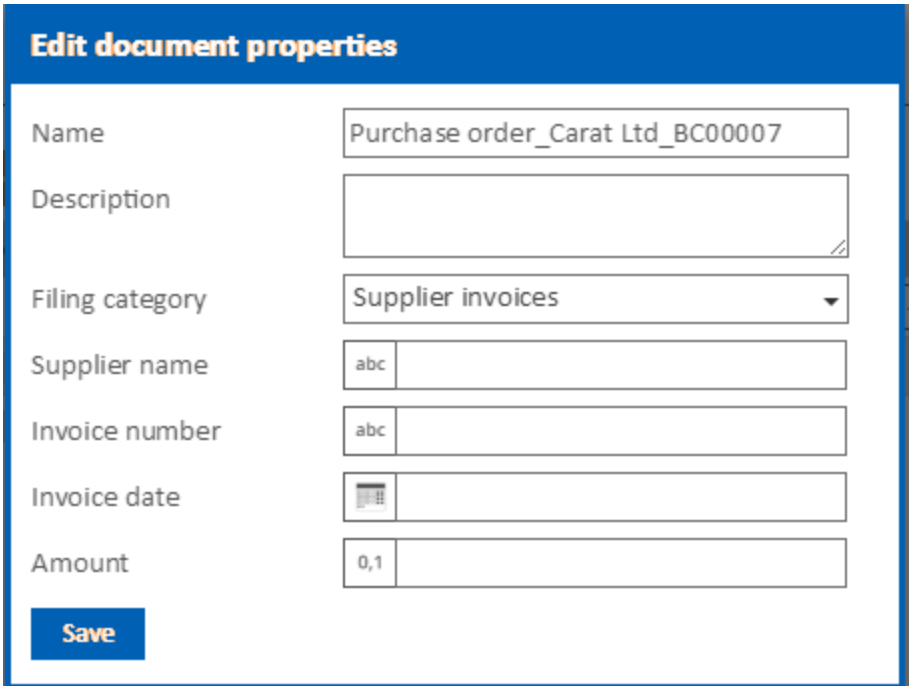
You can modify a document if you have reading and modifying permissions.

To do this:

- Move to the document to be edited.
- Click on **"Modify"**



Enter the new name and click **"Save"** to finish.



This feature is also useful to change a document metadata following an indexing error.

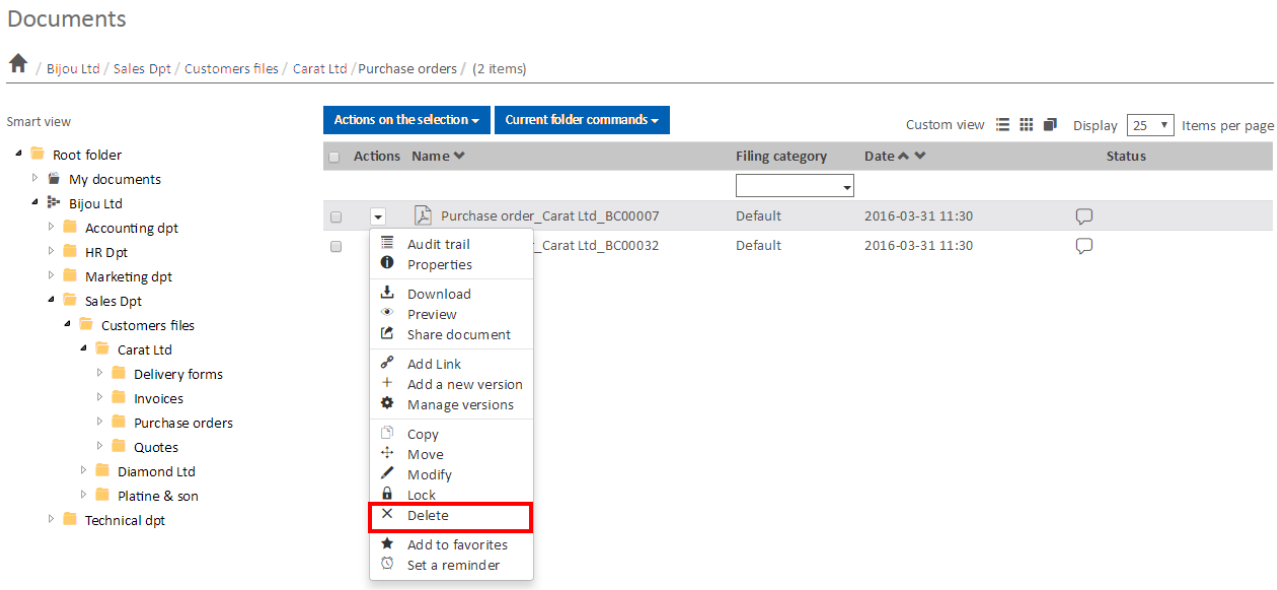
Edit online

This operation is only available for Microsoft Office documents.

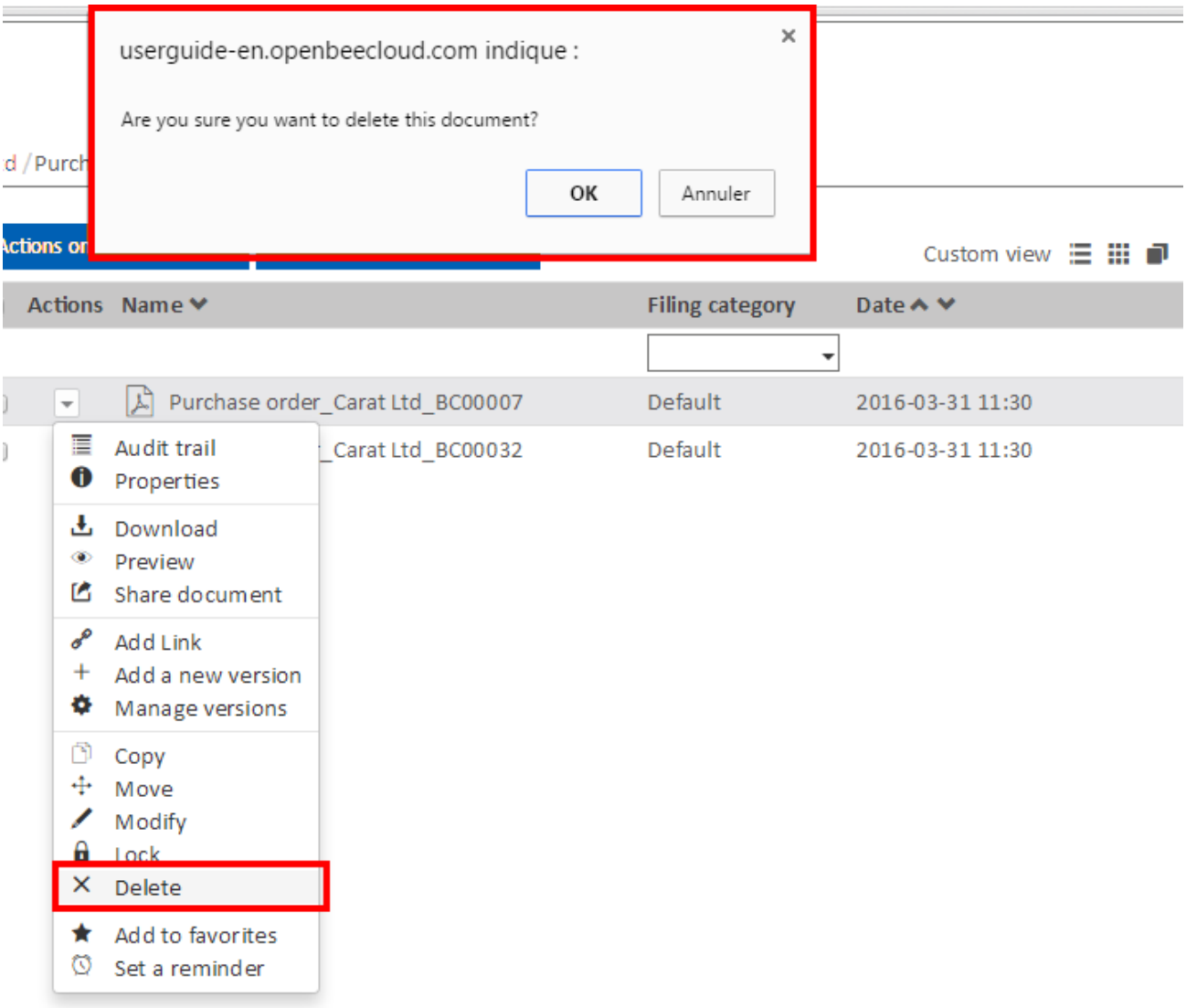
See : Edition d'un document Microsoft Office

Delete

This feature allows to delete a document. A deleted document is moved in a global recycle bin and can be restored by an administrator.



A confirmation window appears. Click **"OK"** to confirm the deletion:



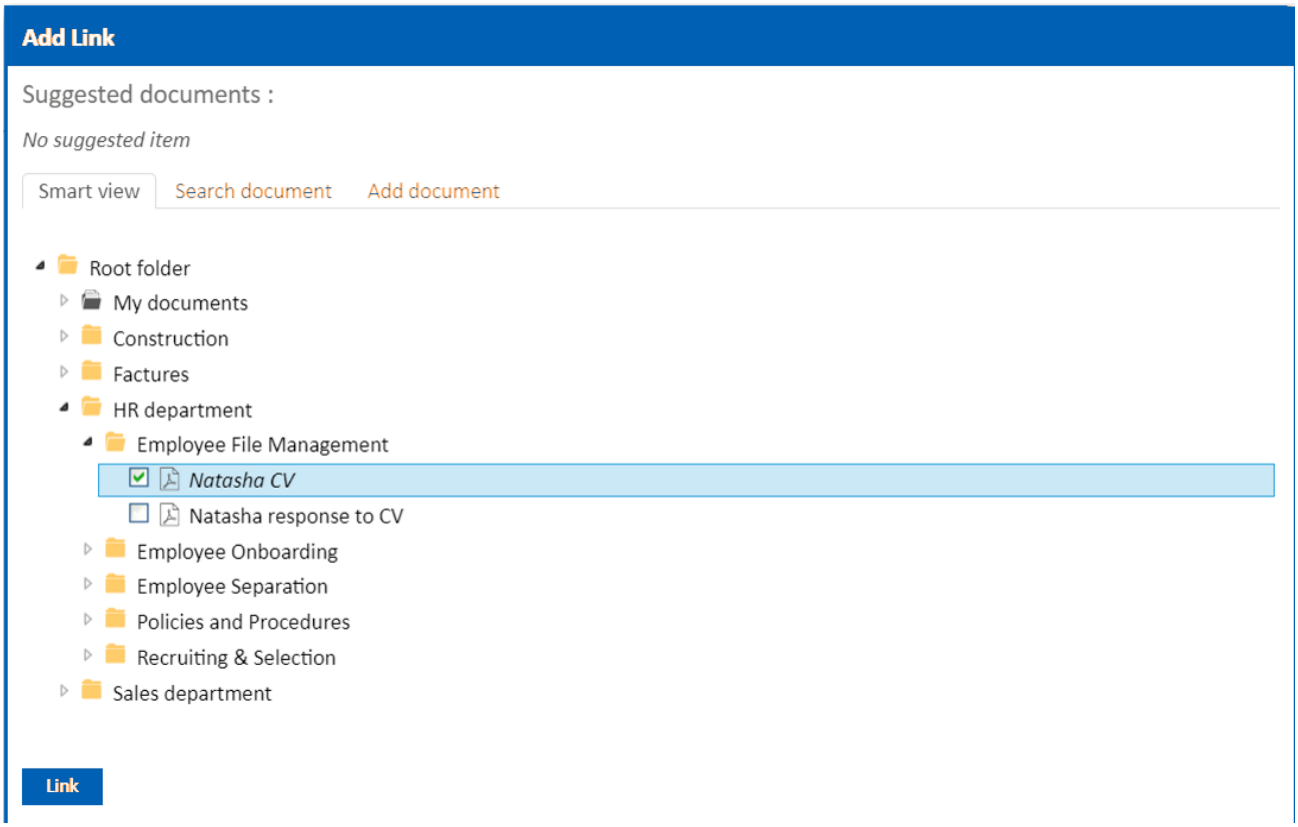
Add link

The **"Add Link"** feature allows to define links between documents.

Indeed, it may be useful to connect two or more documents between them, especially if they deal with the same subject, but are stored in different locations.

To add a link:

- Select the document you want to link to another.
- Select **"Add a link"** from the drop-down menu.



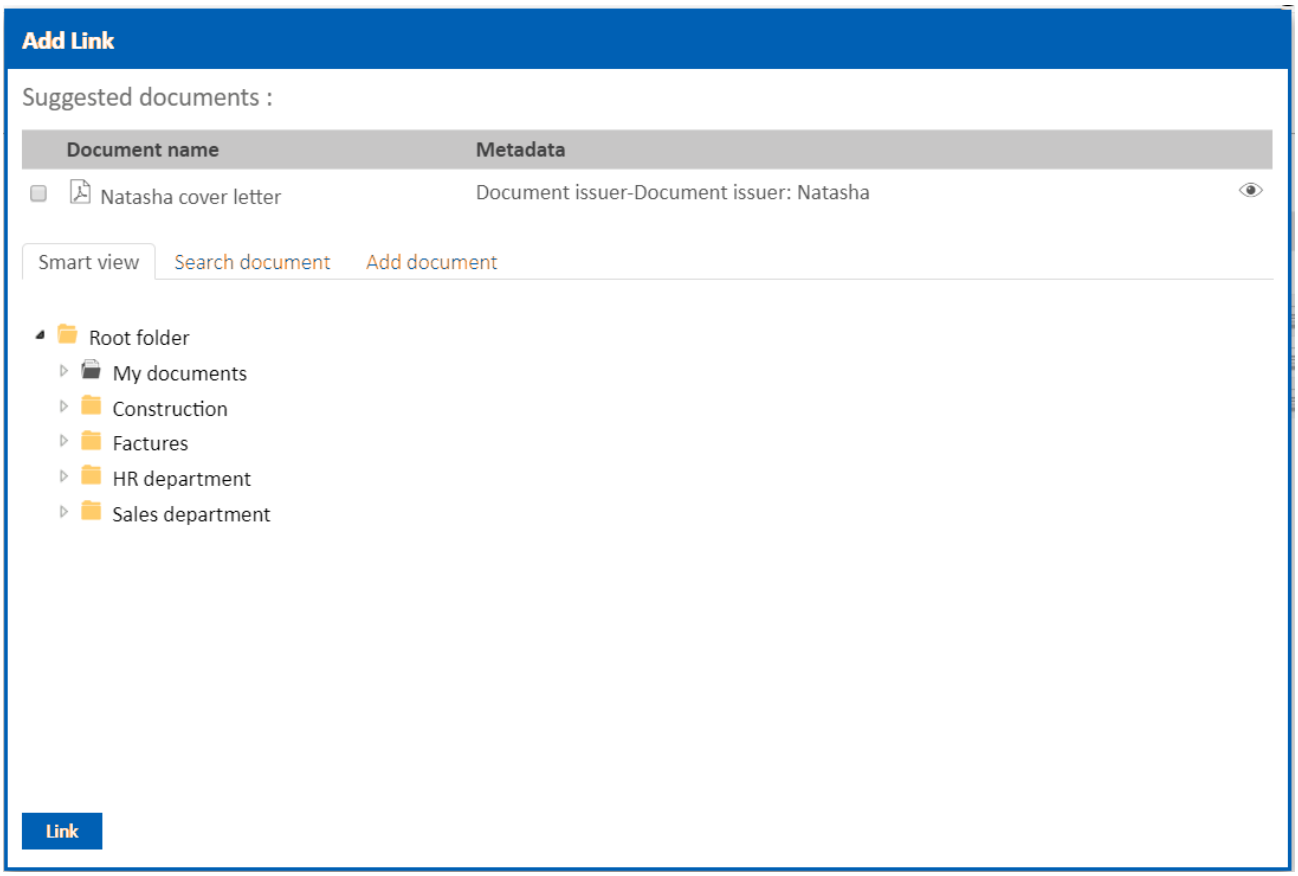
If related documents are detected, they will be suggested in the **"Suggested documents"** section.

To function, the automatic document suggestion must first be setup by the administrator.

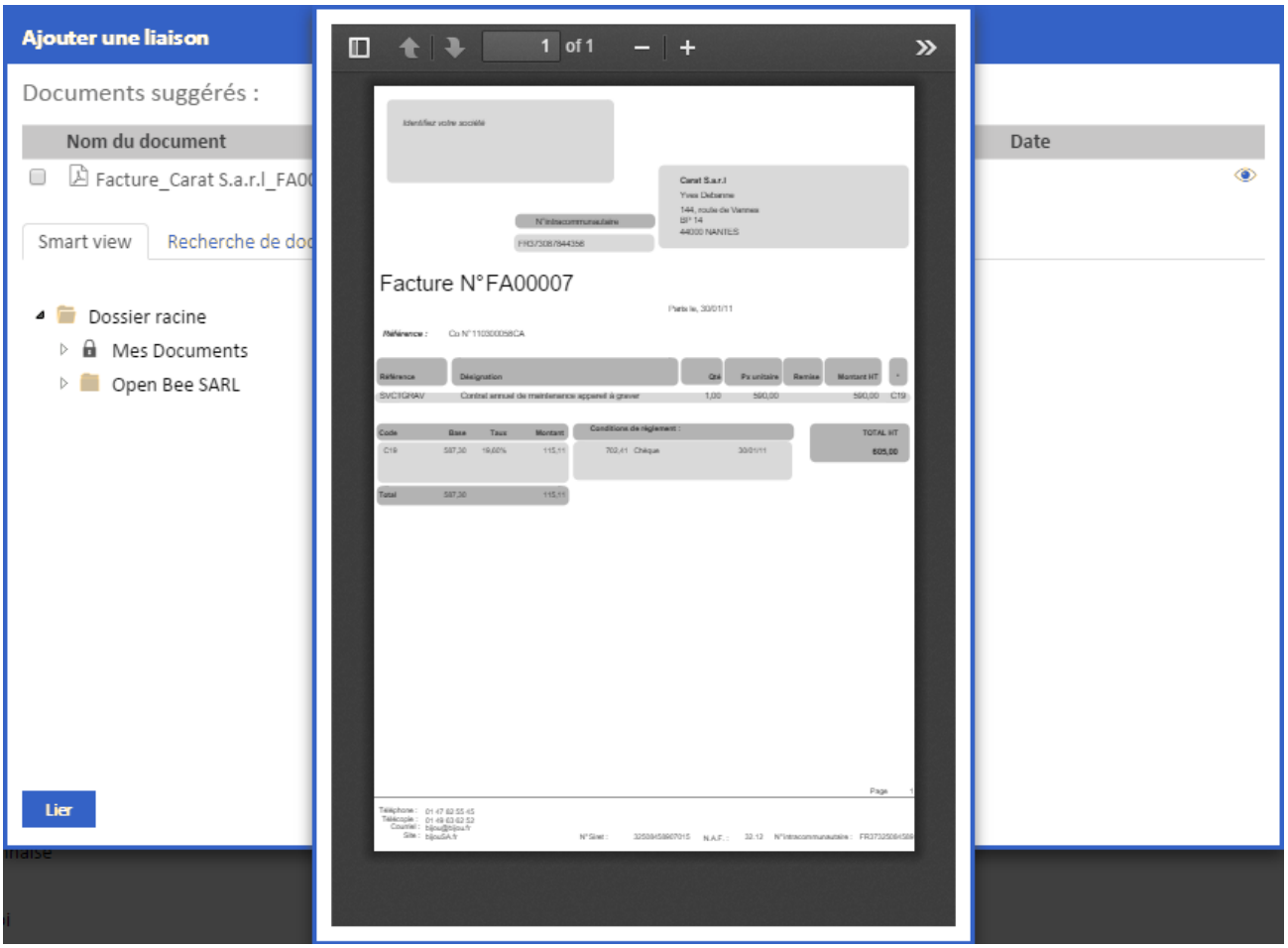
Example :

A user wants to link a 100 € invoice issued by the Konica Minolta company.

If a 100 € purchase order of the Konica Minolta company is archived, it will appear in the "Suggested documents" section.

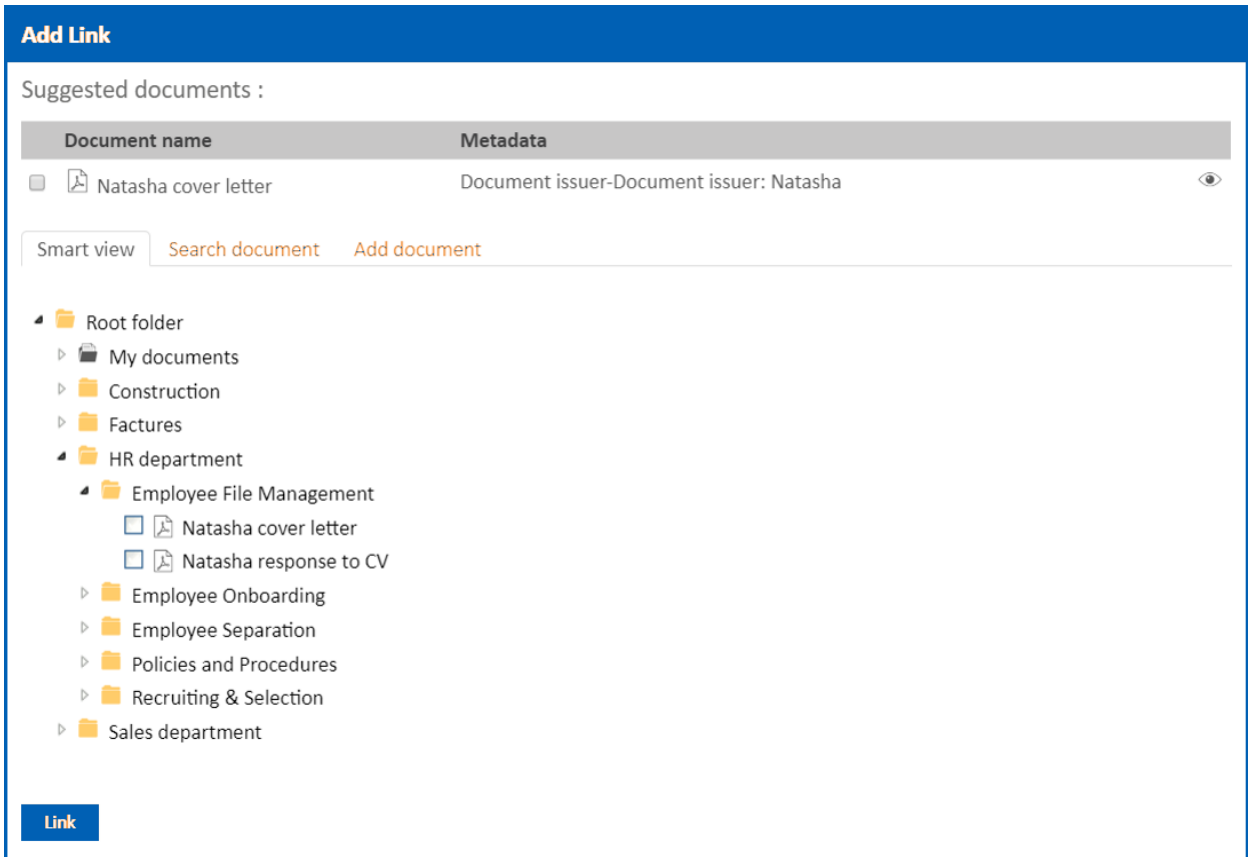


Suggested documents can be viewed by clicking on the icon located to the right of the screen:

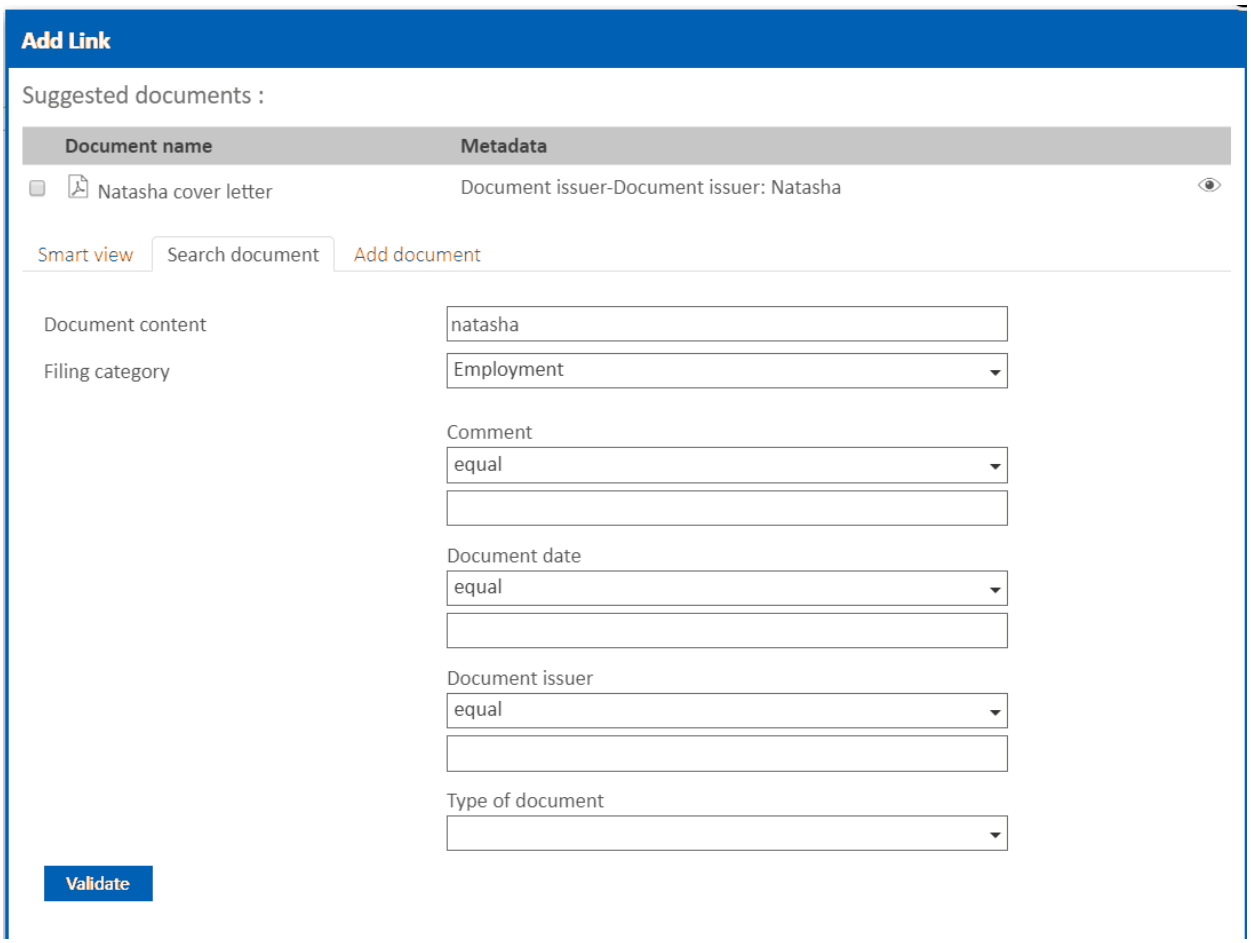


To link a document that has not been "suggested", three options are available :

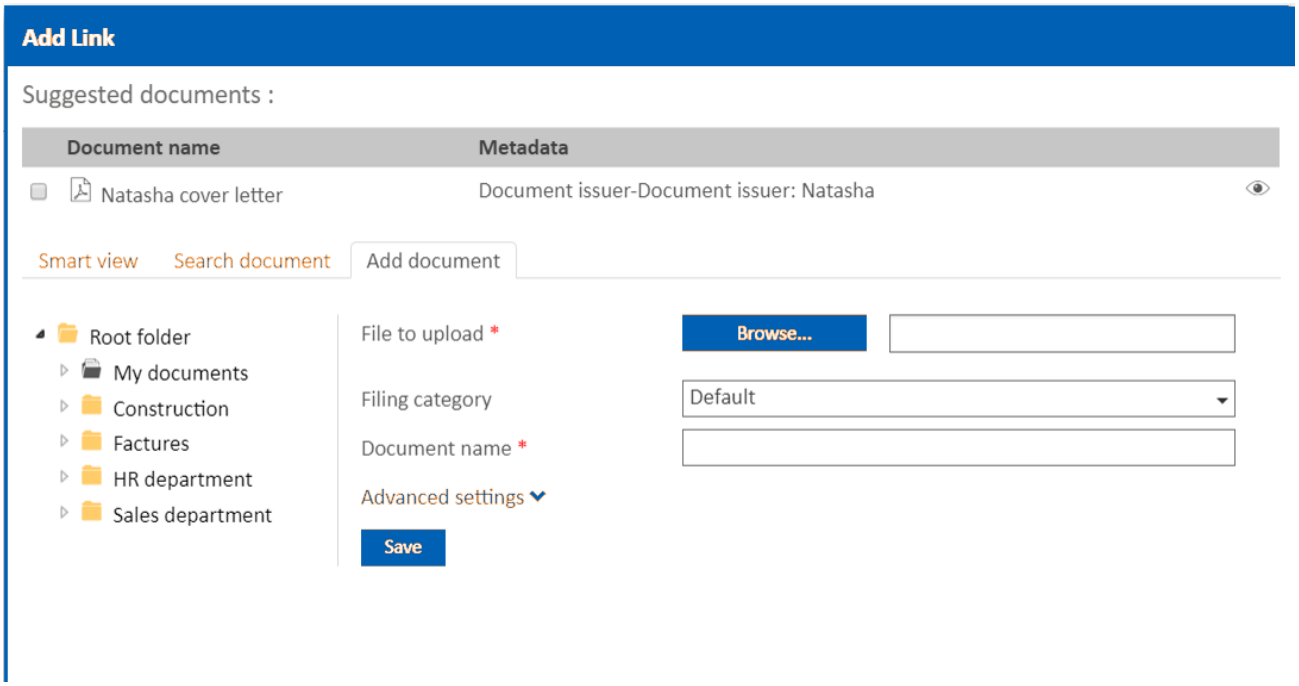
1. Browse your files tree structure to select the document you want to bind your document to (by checking them)



2. Use the document search. Click on the « **Search document** » tab, choose the search criteria, then validate and select the document of your choice.



3. Add a new document. Click on the **"Add document"** tab, and click browse to retrieve the document to be added. The added document will automatically be linked.



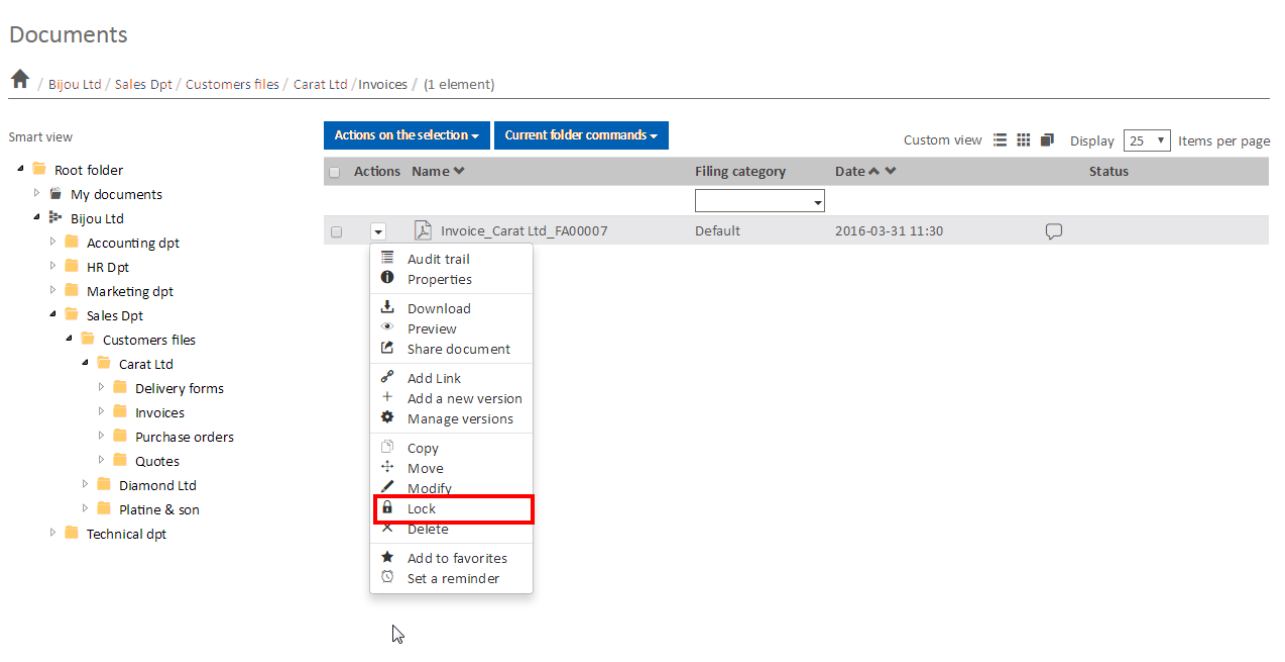
The paperclip icon appears automatically. This indicates that a link was created on the document.

Lock

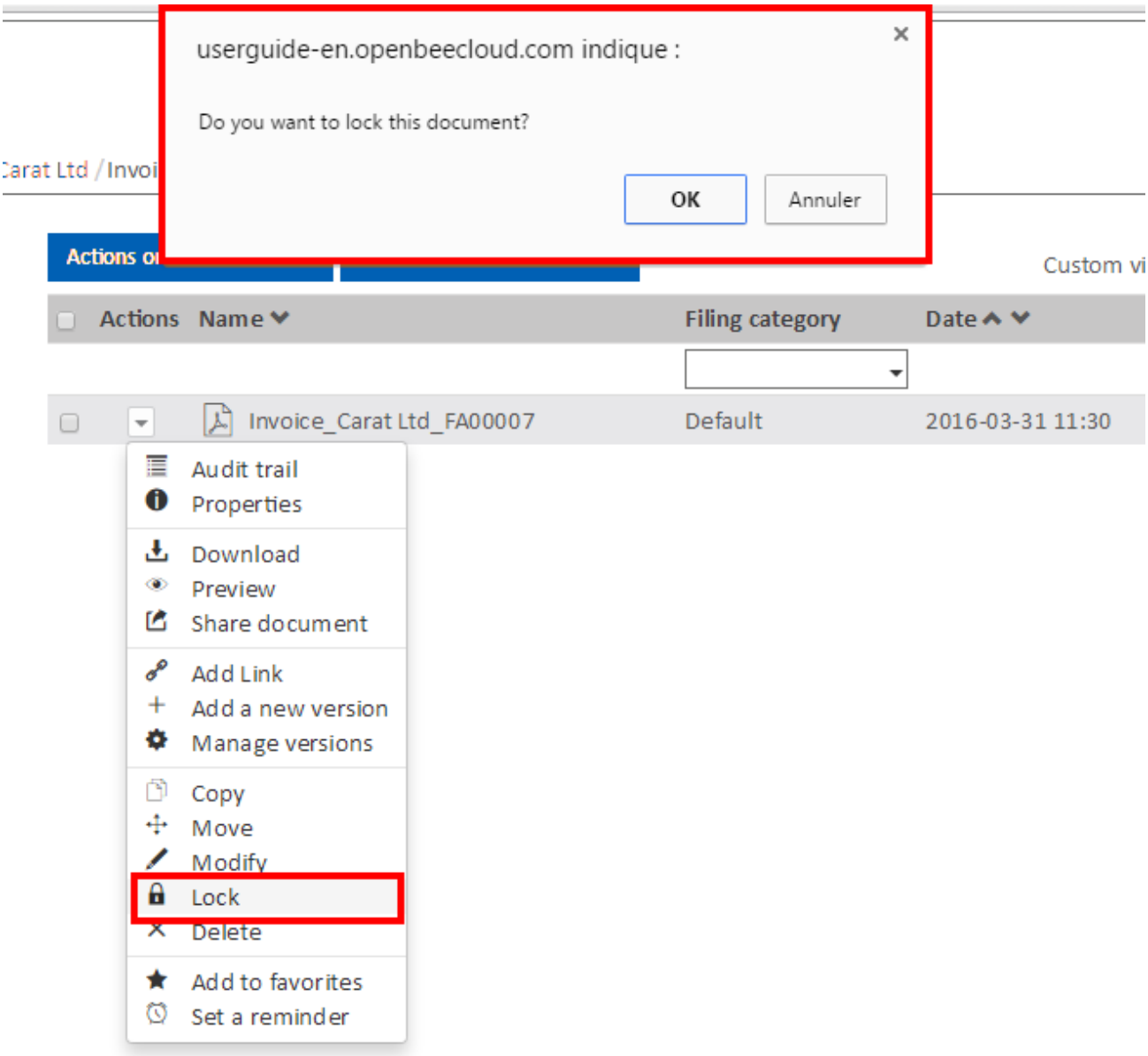
It is sometimes necessary to make changes to a document contained in KOMI Doc.

In this case, it is more careful to lock the document to prevent other users from changing it simultaneously.

To lock a document, click on **"Lock"** from the dropdown menu. To unlock, click **"Unlock"** from the dropdown menu.



Confirm the action by clicking on **"OK"**:



A confirmation message appears.

The only users that can unlock a document are:

- The user who locked it
- An administrator

On a locked document, the following actions are only accessible to **the user who locked the document:**

- Edit the document name and description
- Edit document index
- Add a version
- Change the version
- Download the document
- Delete the document

Other users can not download or edit a locked document.

Add to favorites

Favorites management

Set a reminder

Reminders on documents and folders

Add a comment

Comments on documents and folders

Actions on the folder

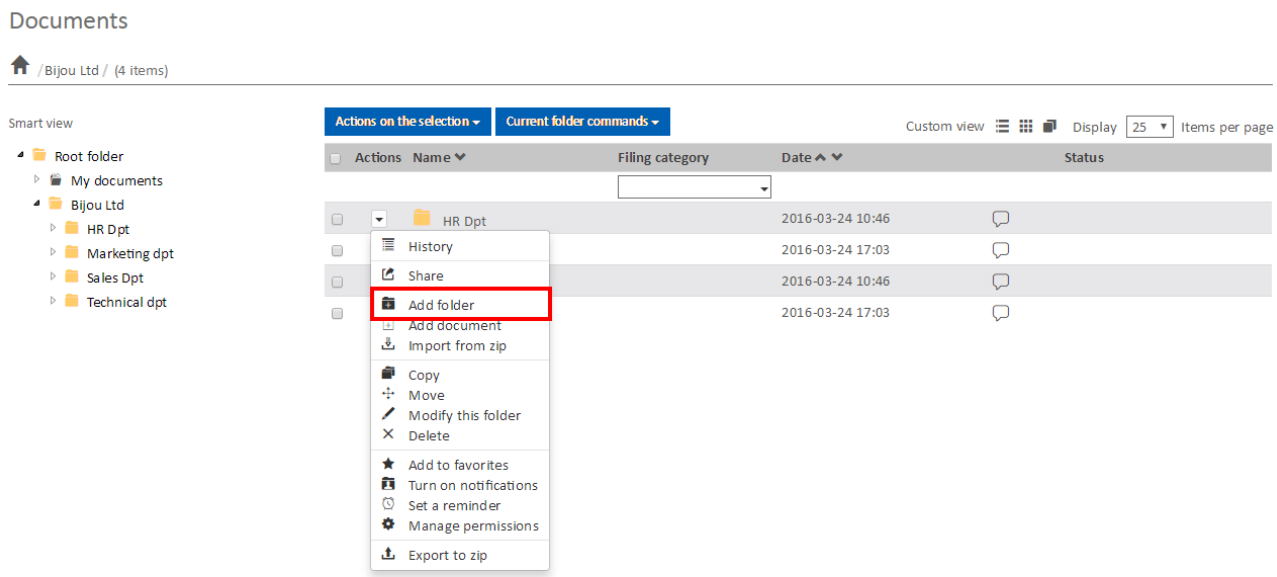
- History
- Add a folder
- Add a document
- Import from Zip
- Export to ZIP
- Copy a folder
- Modify a folder
- Delete a folder
- Move a folder
- Subscribe to a folder
- Share a folder

- Add to favorites
- Add a reminder
- Add a comment
- Manage permissions

History

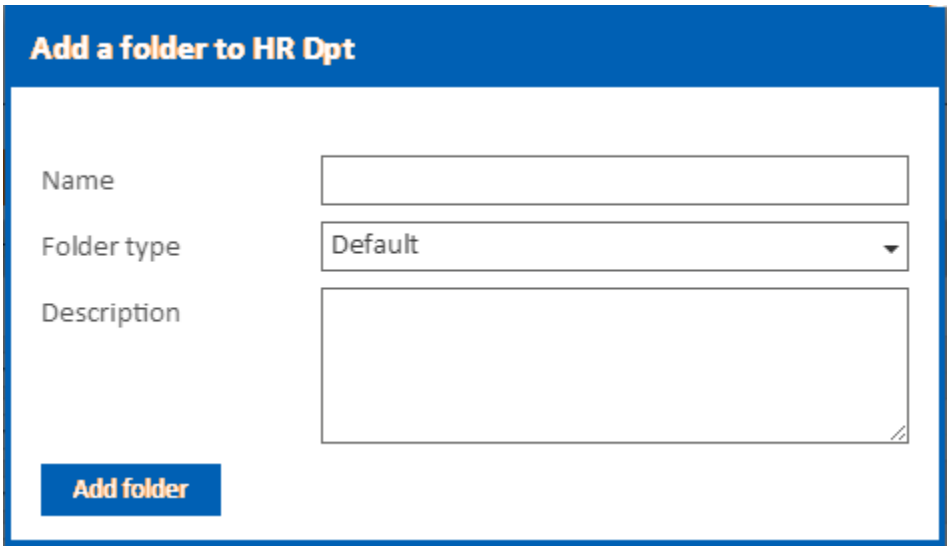
Documents and folders history

Add a folder



To add a folder in the current folder or the root folder, click **"Add folder"** from the **"Actions"** column's drop-down list in KOMI Doc

The following window appears:



- Enter a name for the folder and its description if you want
- Click on "Add folder" to complete the operation

Folders names' length

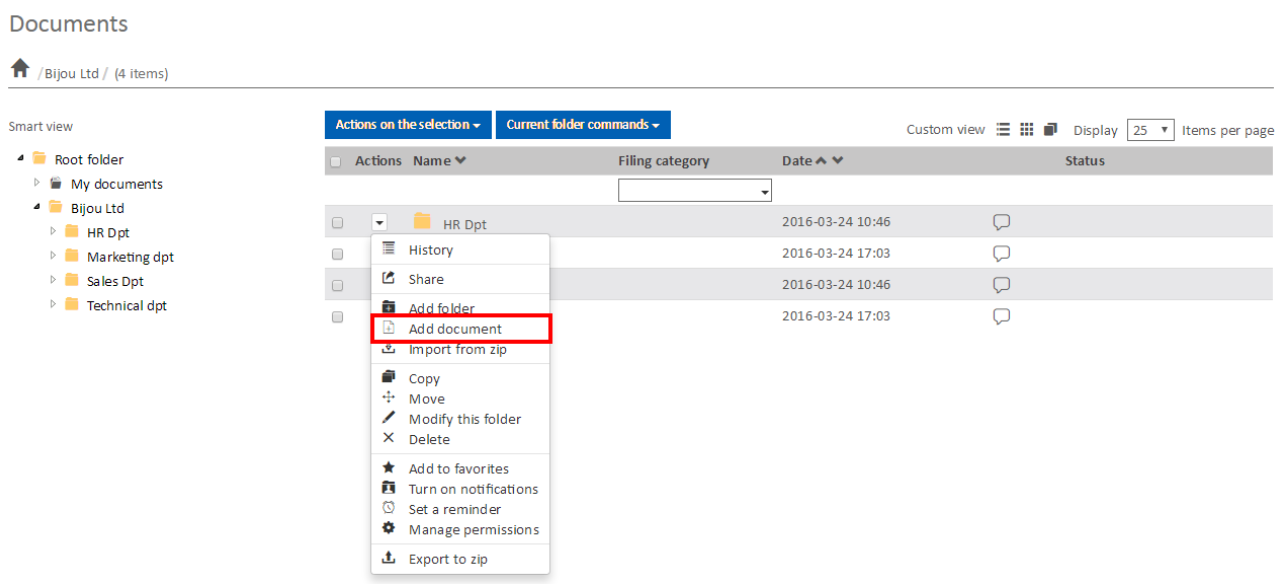
A folder name's length is limited to 255 characters. Adding a document with a greater name length is possible but the **name will be truncated**.

KOMI Doc is **"case insensitive"**, meaning that **it is not possible** to create two folders with the same name, using a different combination of lowercase / uppercase.

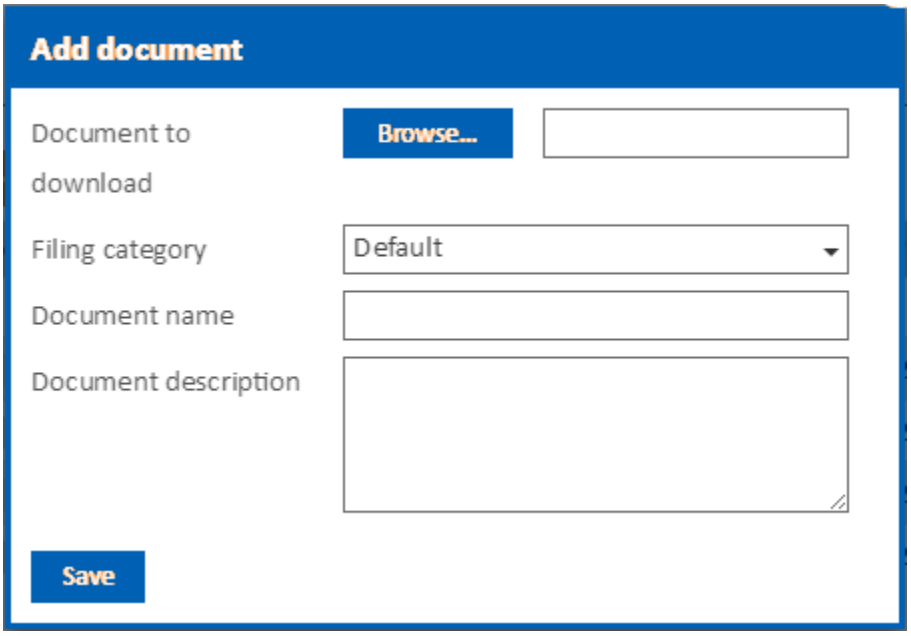
Example : « Invoices » and « invoices».

Add a document

Click **"Add document"** in the **"Actions"** column's drop-down list.



The following window appears:



- Enter the document name and description
- Click **"Browse ...."**
- Select the file to be added
- Choose the document type (default or other)

- Click **"Add document"**
- The confirmation message: **"The folder has been successfully added"** appears

Supported formats for indexing

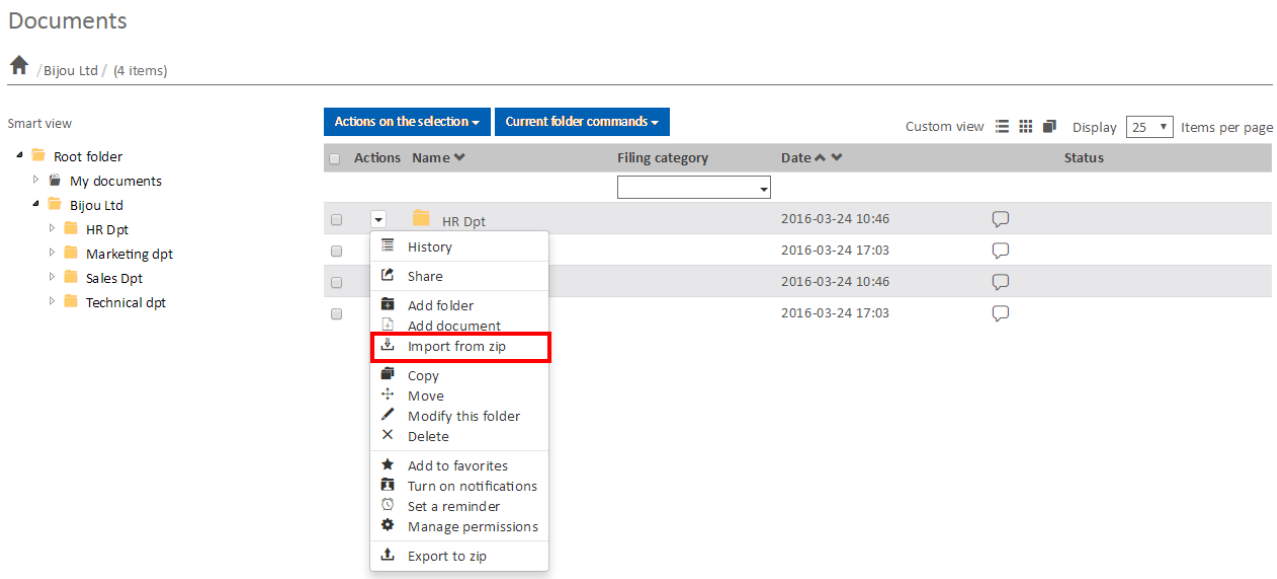
The document content is automatically indexed by KOMI Doc for the following formats :

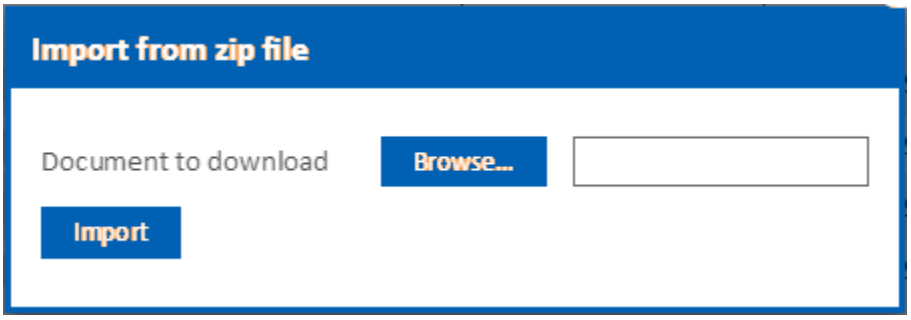
- .pdf (Pdf text)
- .doc, .docx (Word)
- .xls, .xlsx, .csv (Excel)
- .pptx (Power Point 2007 Presentation)
- .txt (Text document)
- .rtf (Rich Text Format)
- .odt, .ods, .odp, .odg (Open Office)

Name's length

The document name's length is limited to 255 characters. Adding a greater document name's length is possible but the **name will be truncated.**

Import from Zip





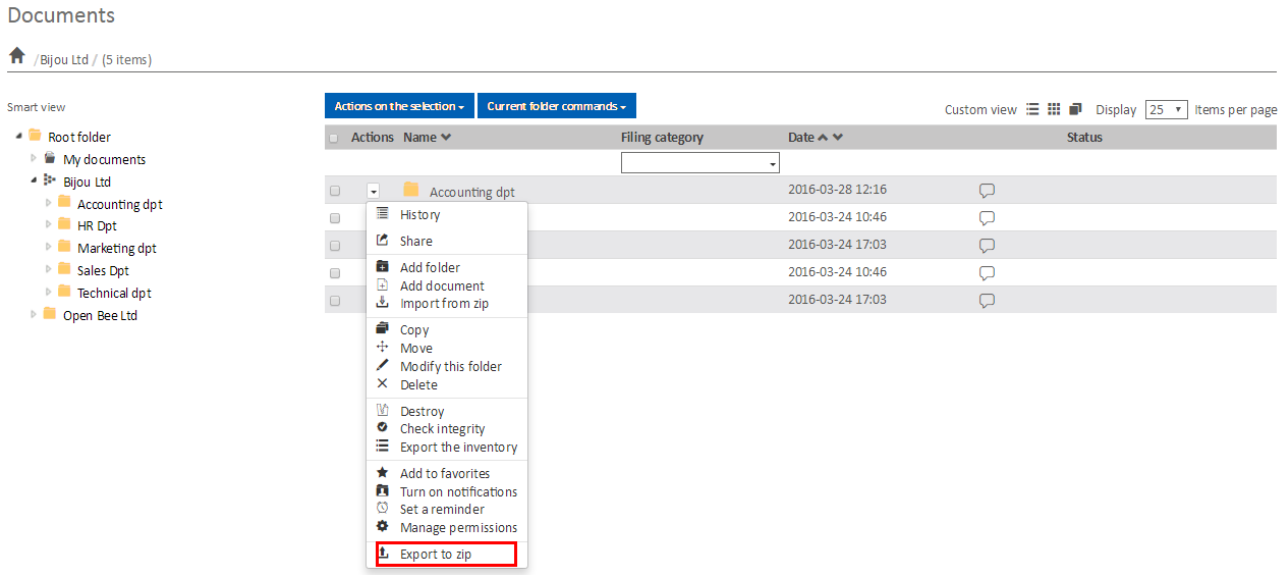
This module provides the ability to import a folder tree structure and mass documents from a ZIP file.

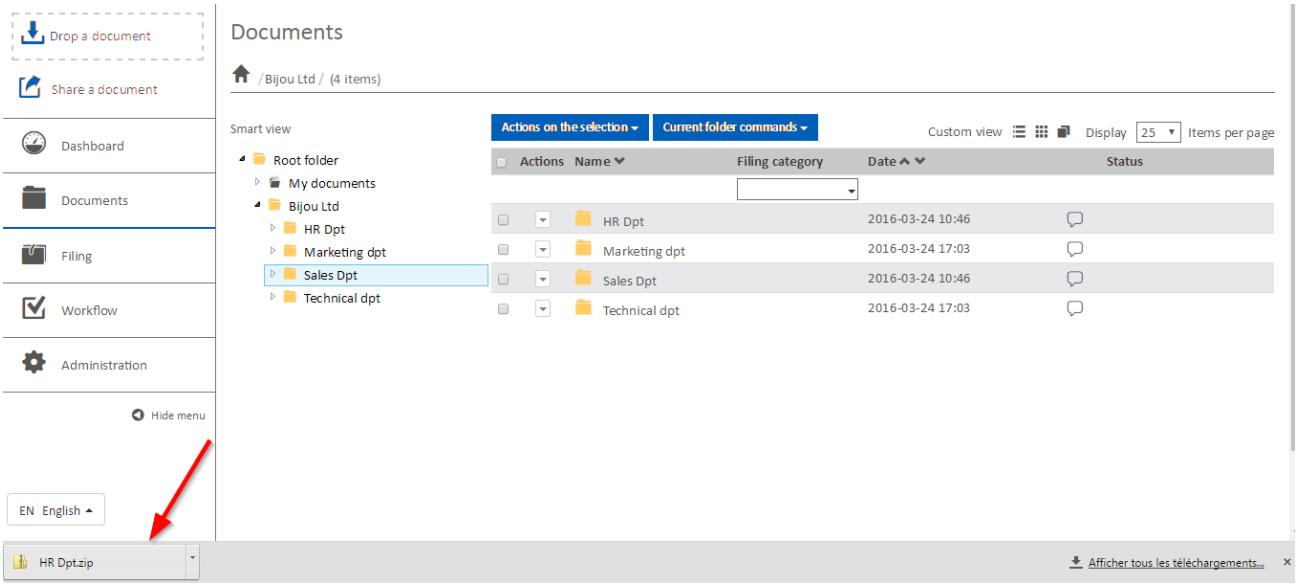
To do this:

- Move to the folder in which you want to import your files and folder tree
- Click **"Import from ZIP"** from the drop-down menu **"Actions"**
- Click **"Browse"** to locate on your PC the ZIP file to import
- Click **"Import"** to complete the operation

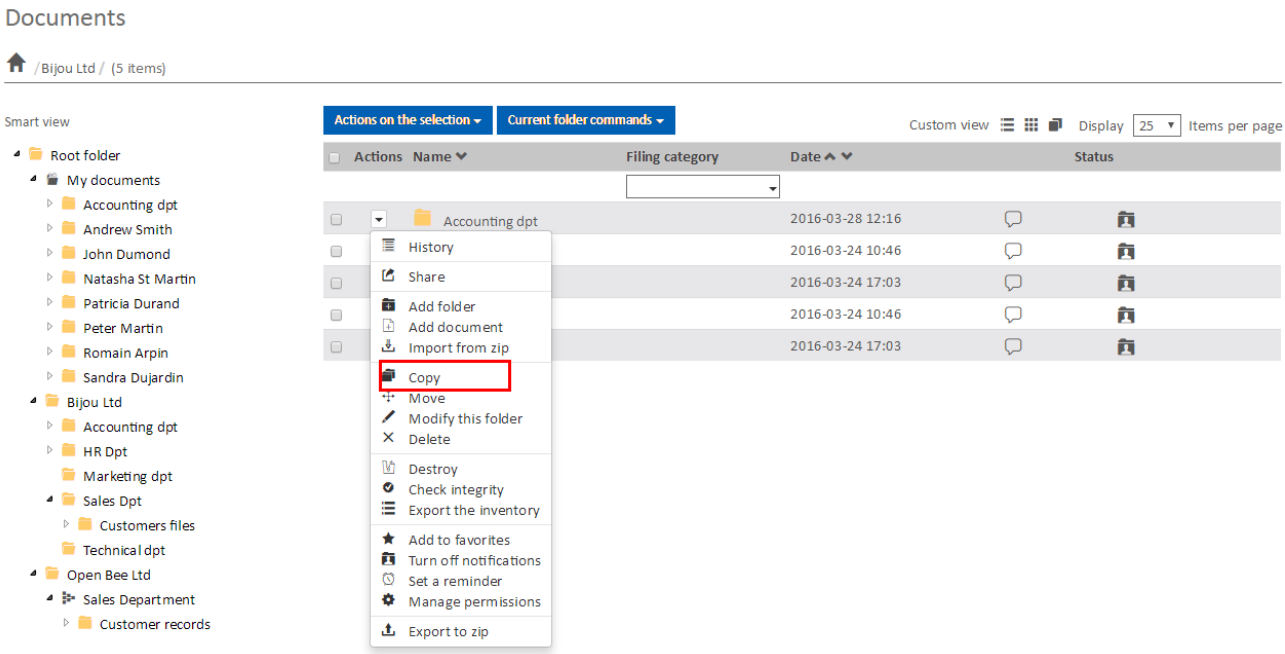
NB : ZIP files created with WinRar use encoding that is not fully recognized by KOMI Doc. We recommend using 7Zip or Windows Explorer to create the files to import.

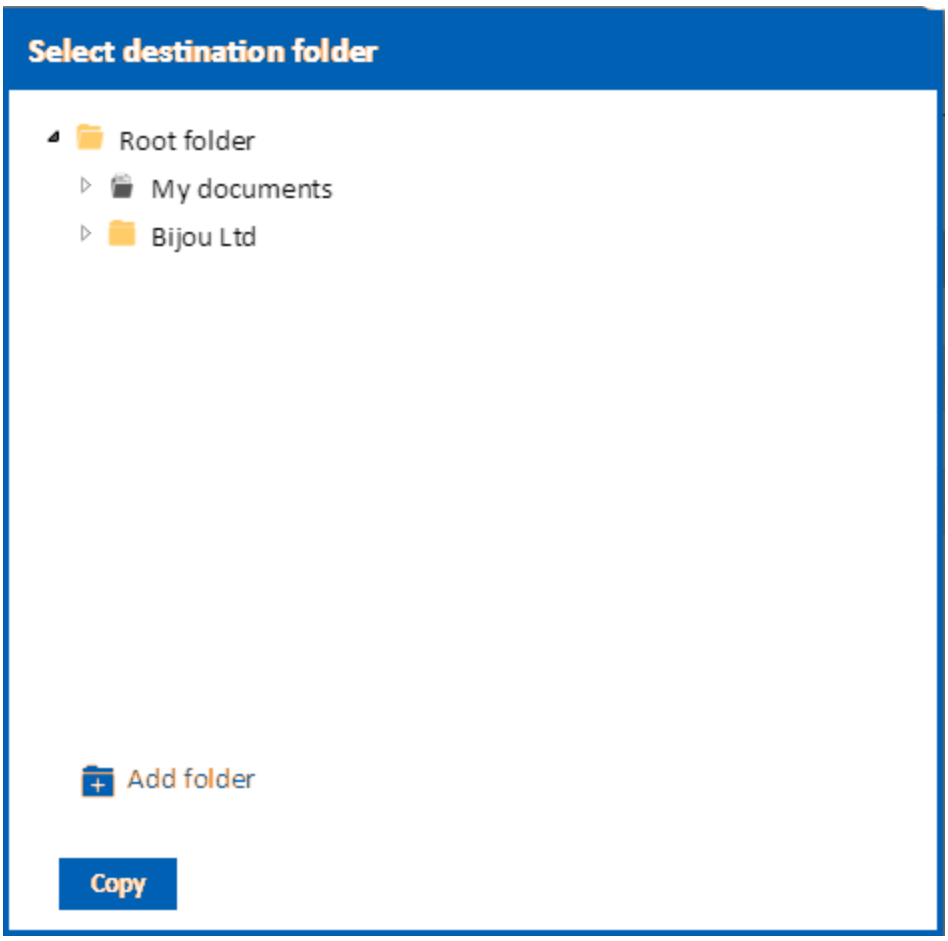
Export to ZIP





Copy a folder


Documents
/ Bijou Ltd / (5 items)
Smart view
Root folder
My documents
Accounting dpt
Andrew Smith
John Dumond
Natasha St Martin
Patricia Durand
Peter Martin
Romain Arpin
Sandra Dujardin
Bijou Ltd
Accounting dpt
HR Dpt
Marketing dpt
Sales Dpt
Customers files
Technical dpt
Open Bee Ltd
Sales Department
Customer records
Actions on the selection
Current folder commands
Custom view
Display 25 Items per page
Actions
Name
Filing category
Date
Status
Accounting dpt
2016-03-28 12:16
2016-03-24 10:46
2016-03-24 17:03
2016-03-24 10:46
2016-03-24 17:03
History
Share
Add folder
Add document
Import from zip
Copy
Move
Modify this folder
Delete
Destroy
Check integrity
Export the inventory
Add to favorites
Turn off notifications
Set a reminder
Manage permissions
Export to zip

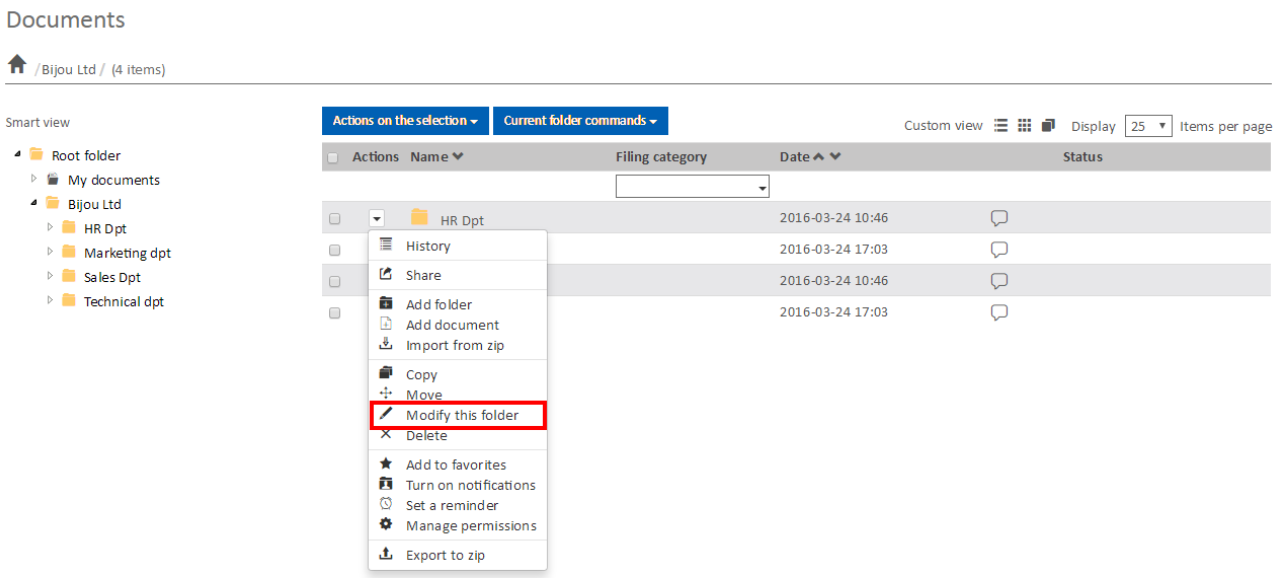

Select destination folder
Root folder
My documents
Bijou Ltd
Add folder
Copy

Modify a folder

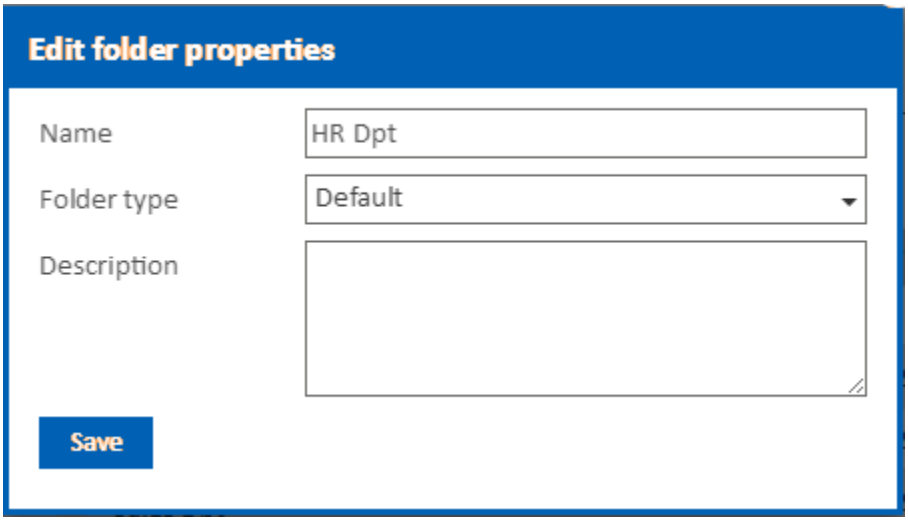
You can change a folder (if you have the rights).

To do so :

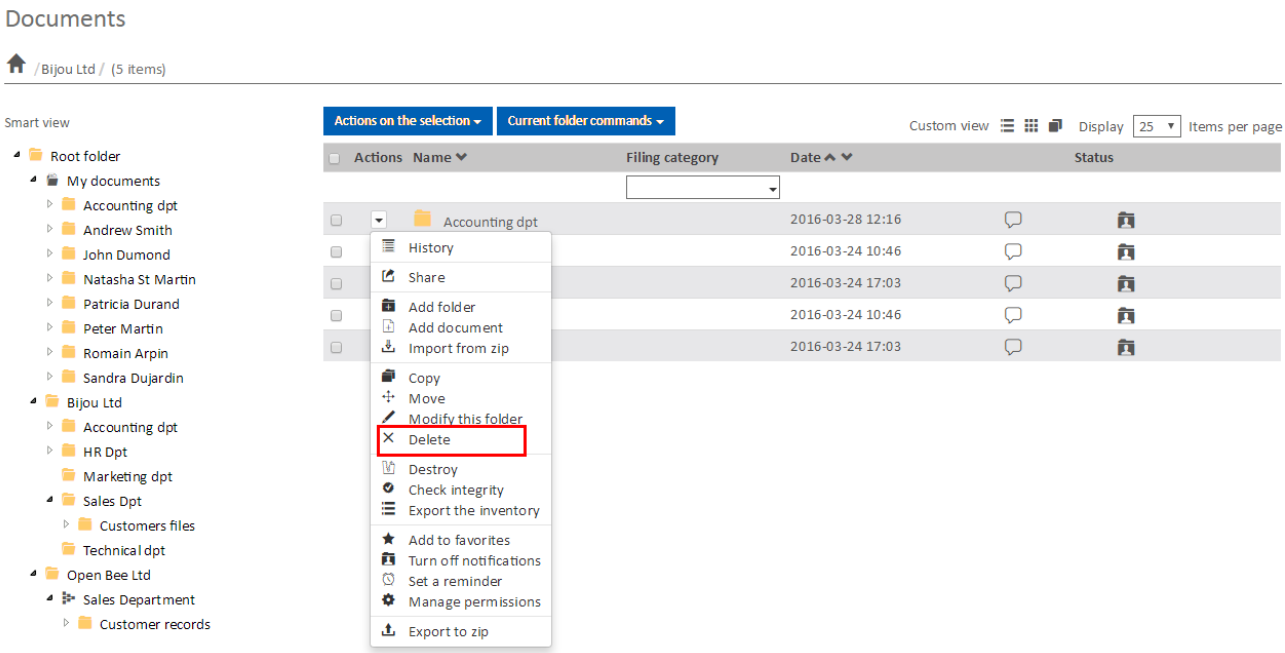
- Click the drop-down menu (below the **"Actions"** column)

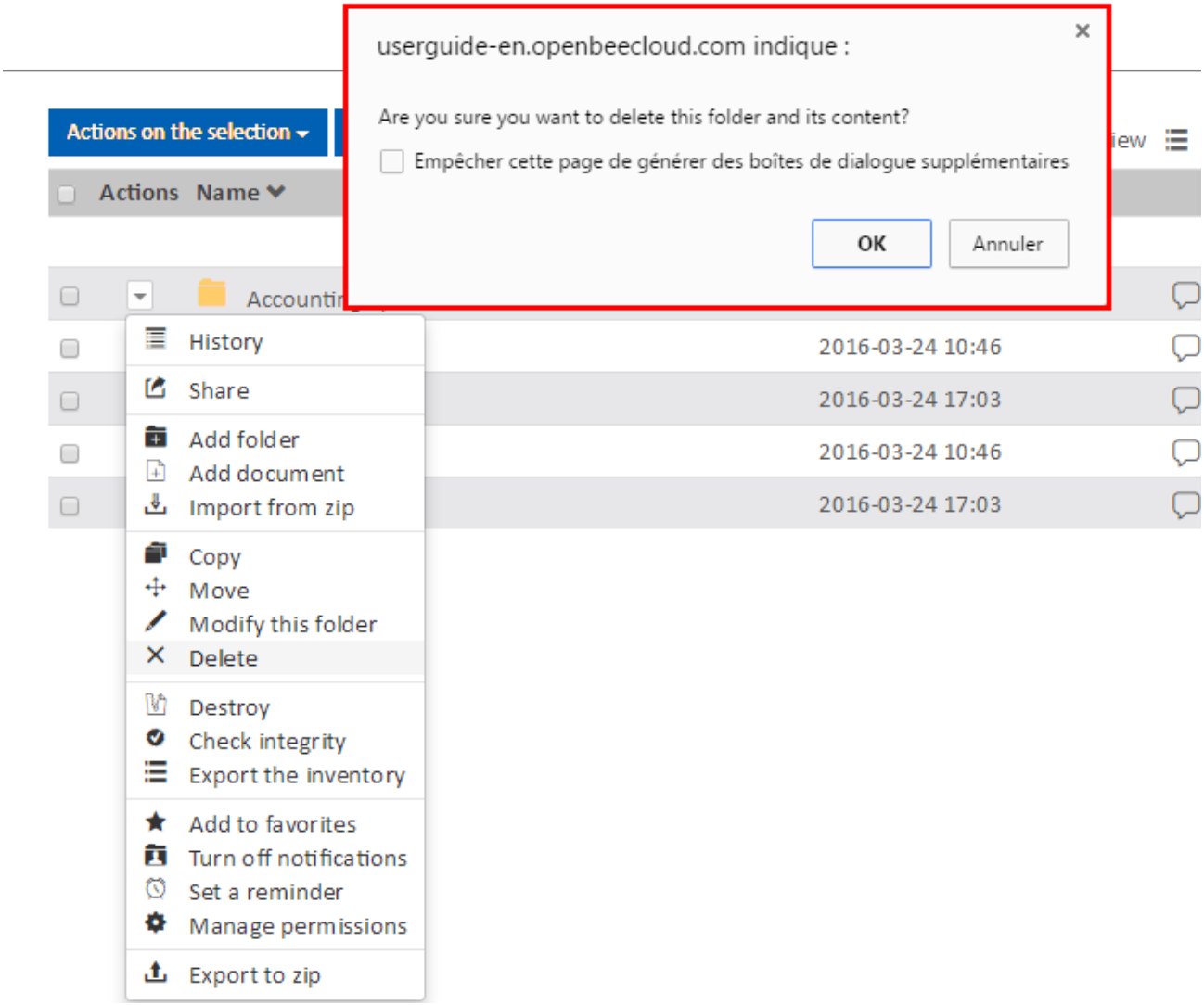


- Click on "**Modify this folder**"
- Make changes
- Click on **"Save"** to complete the operation

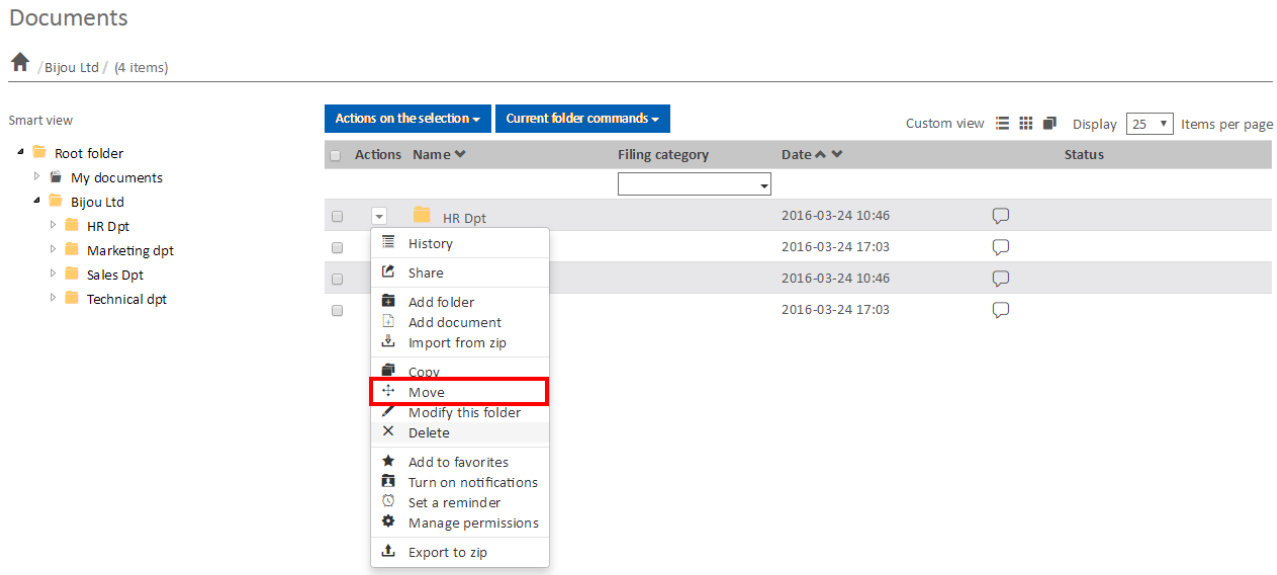


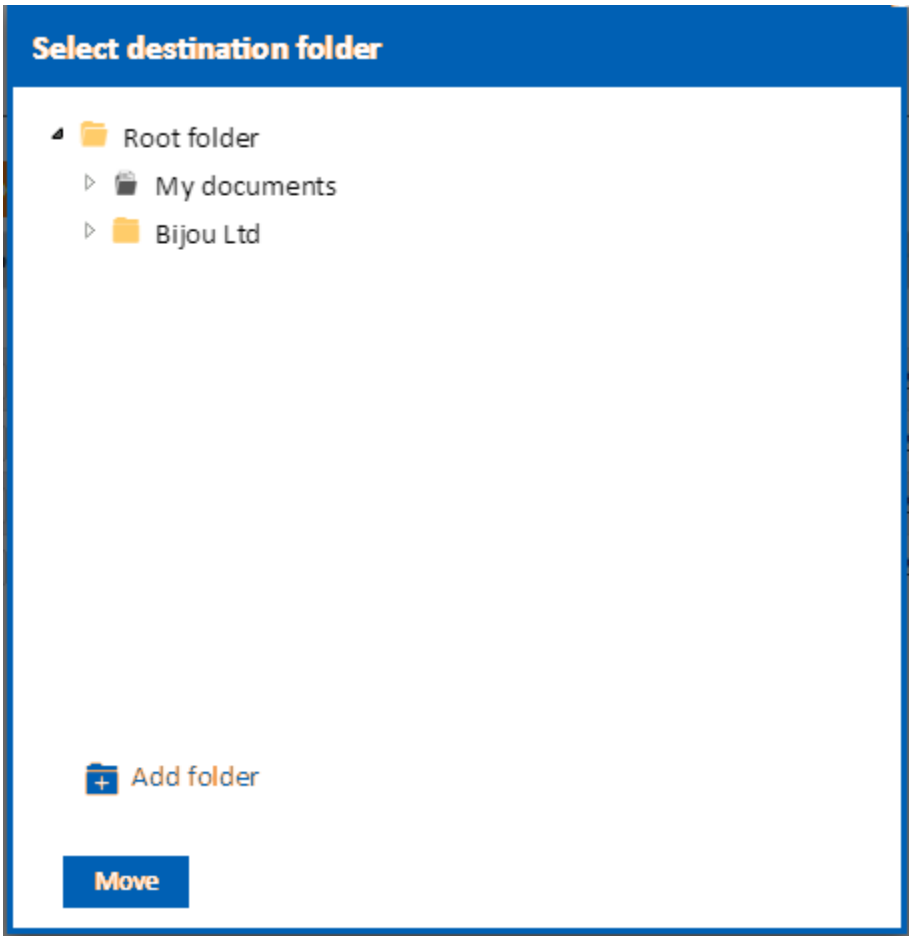
Delete a folder



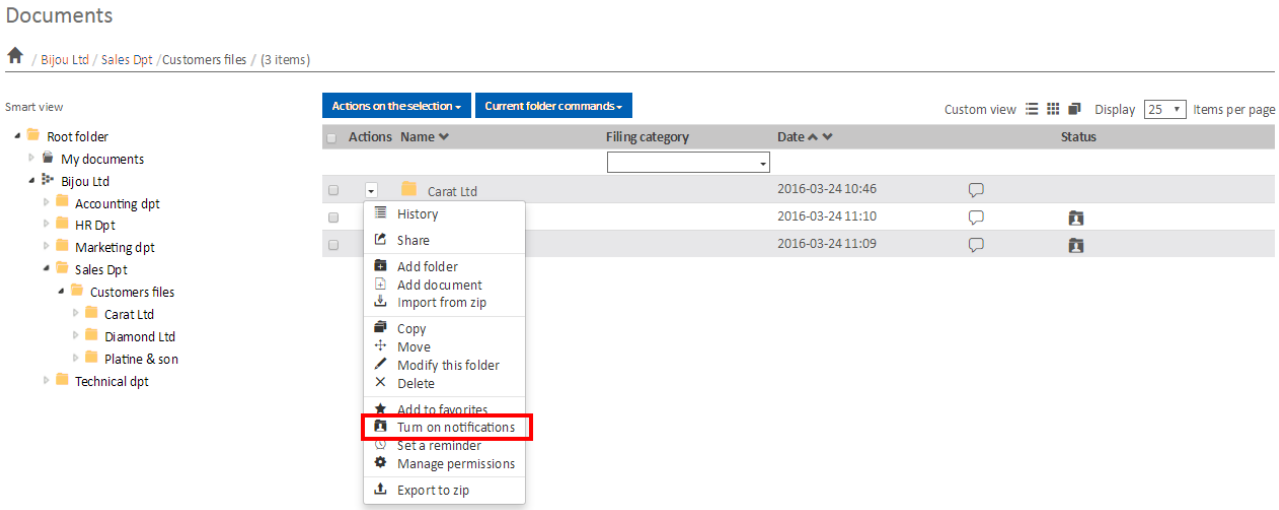

userguide-en.openbeecloud.com indique :
Are you sure you want to delete this folder and its content?
Empêcher cette page de générer des boîtes de dialogue supplémentaires
OK
Annuler
Actions on the selection
Actions
Name
History
Share
Add folder
Add document
Import from zip
Copy
Move
Modify this folder
Delete
Destroy
Check integrity
Export the inventory
Add to favorites
Turn off notifications
Set a reminder
Manage permissions
Export to zip
2016-03-24 10:46
2016-03-24 17:03
2016-03-24 10:46
2016-03-24 17:03

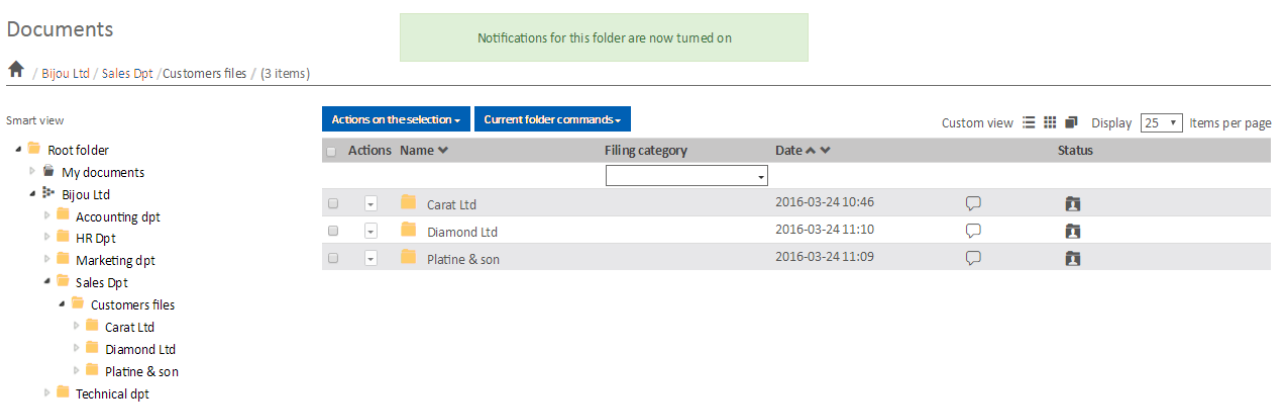
Move a folder




Select destination folder
Root folder
My documents
Bijou Ltd
Add folder
Move

Subscribe to a folder





Share a folder

Share documents and folders

Add to favorites

Favorites management

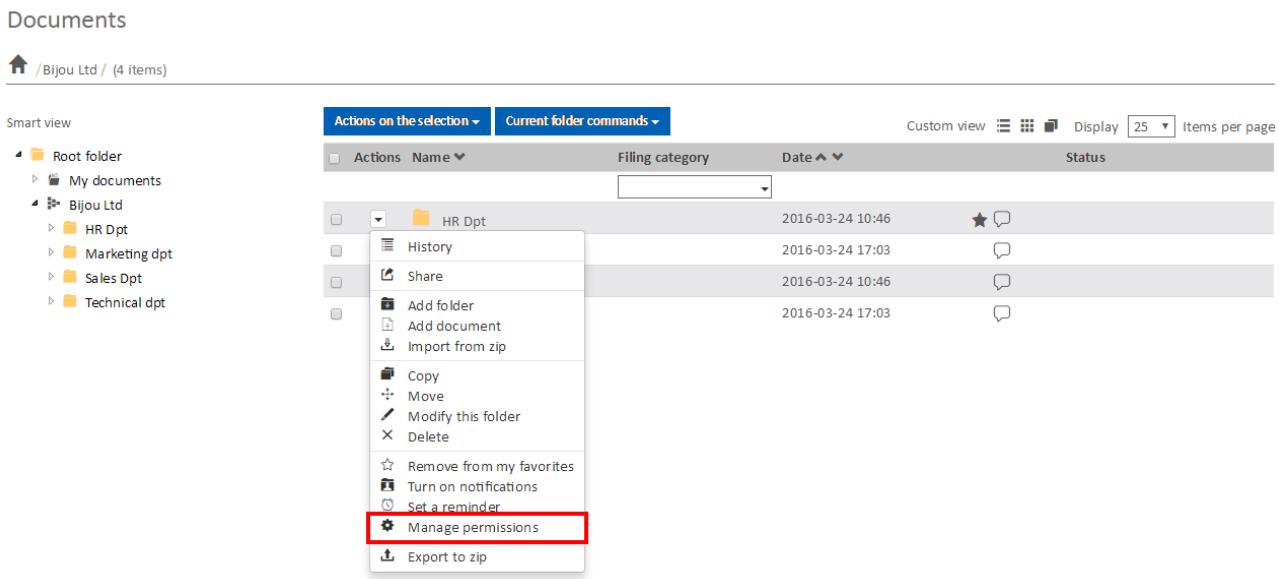
Add a reminder

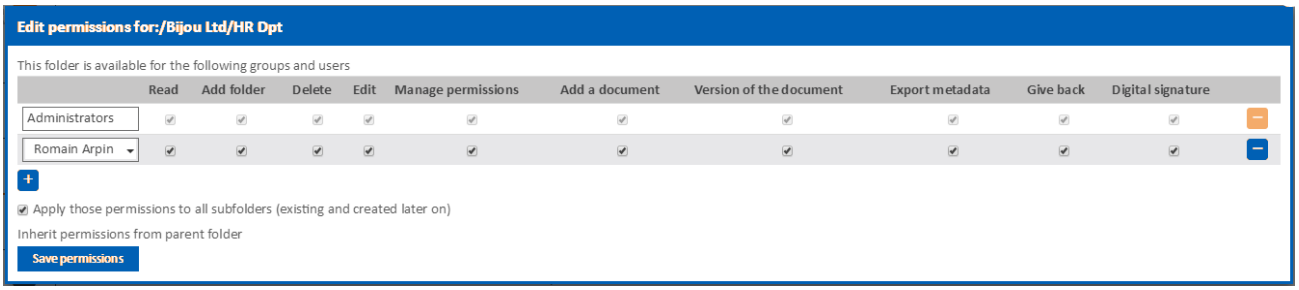
Reminders on documents and folders

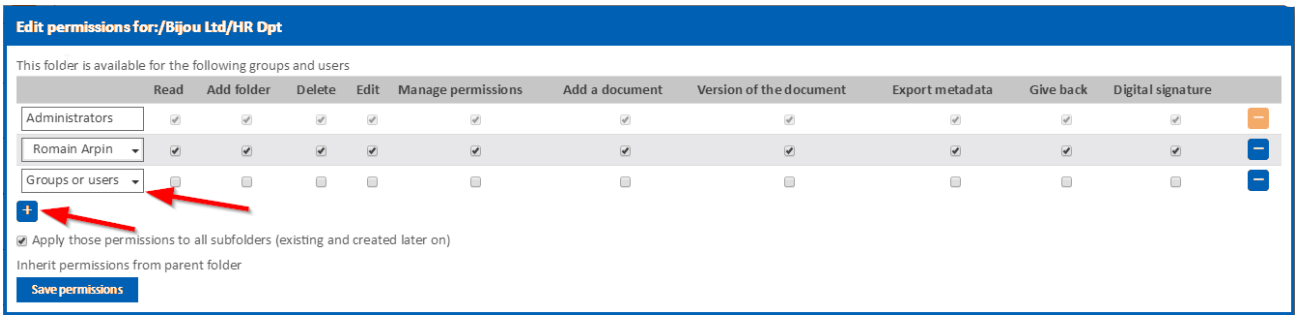
Add a comment

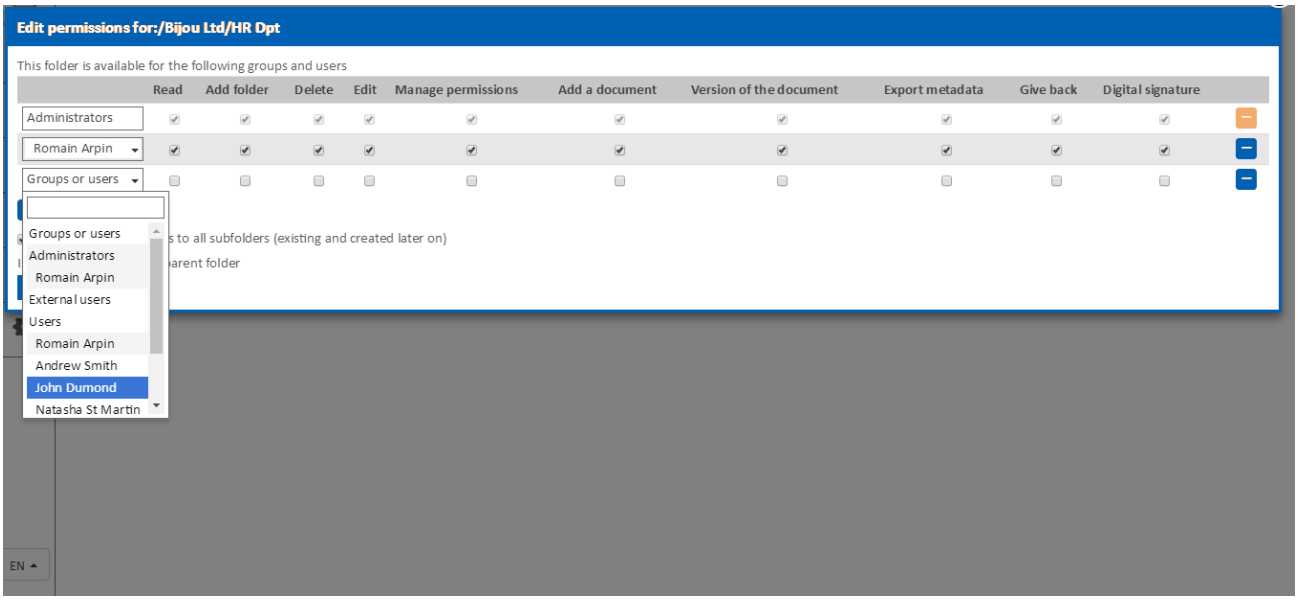
Comments on documents and folders

Manage permissions





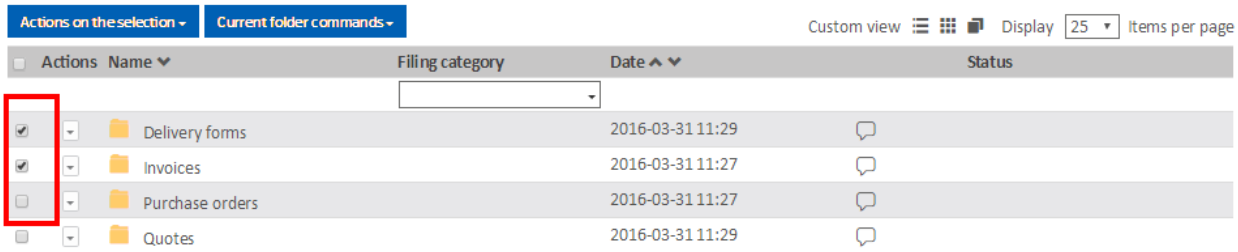




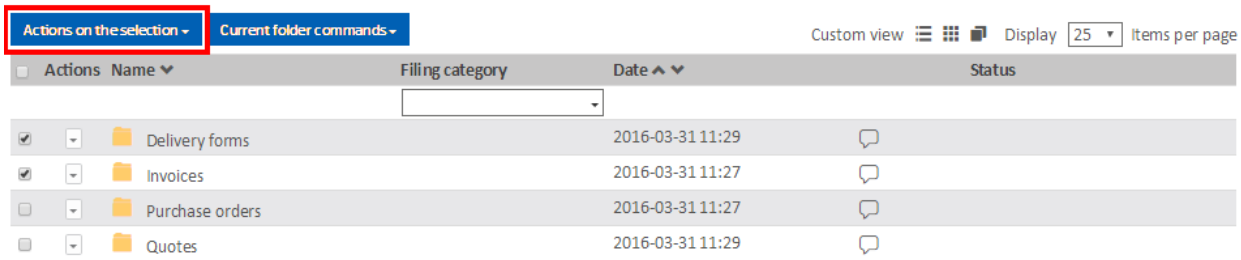
Actions on the selection

It is possible to perform actions on batches of folders and documents:

1. Select the folders and / or documents



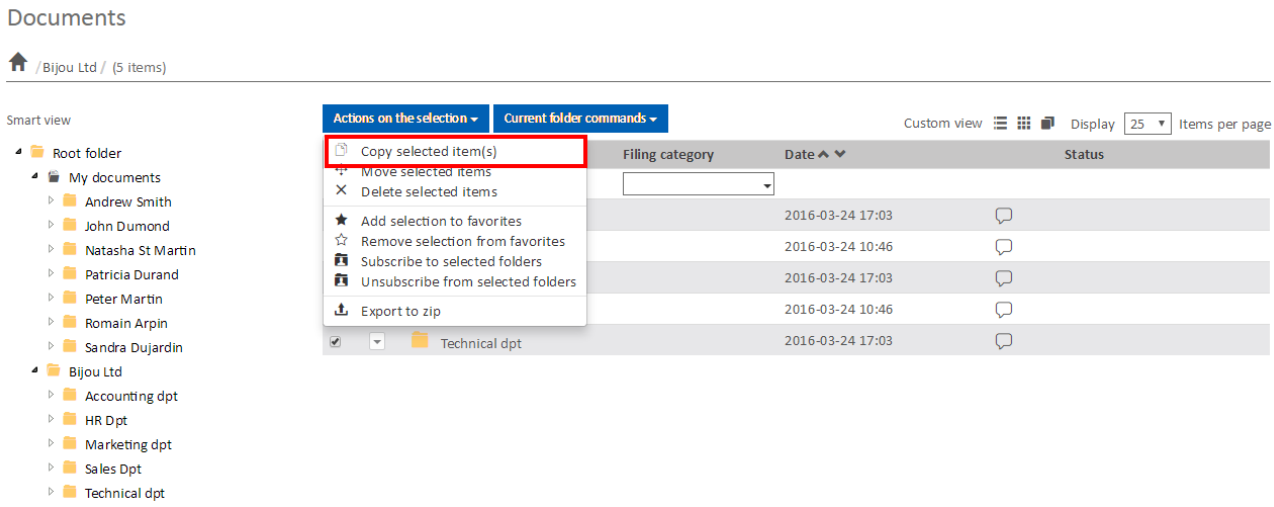
2. Choose an action from the menu **"Action on the selection"**:



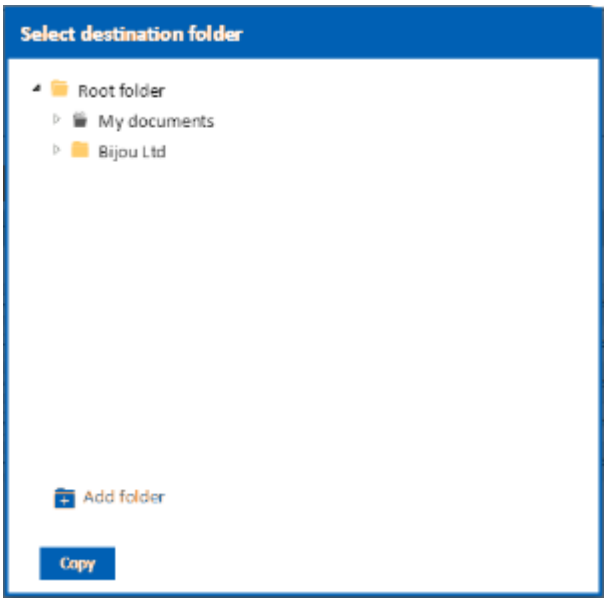
The following actions are available:

- Copy the selection
- Move the selection
- Delete the selection
- Add the selection to favorites
- Remove the selection from favorites
- Subscribe to selected folders
- Unsubscribe from selected folders
- Export to zip

Copy the selection

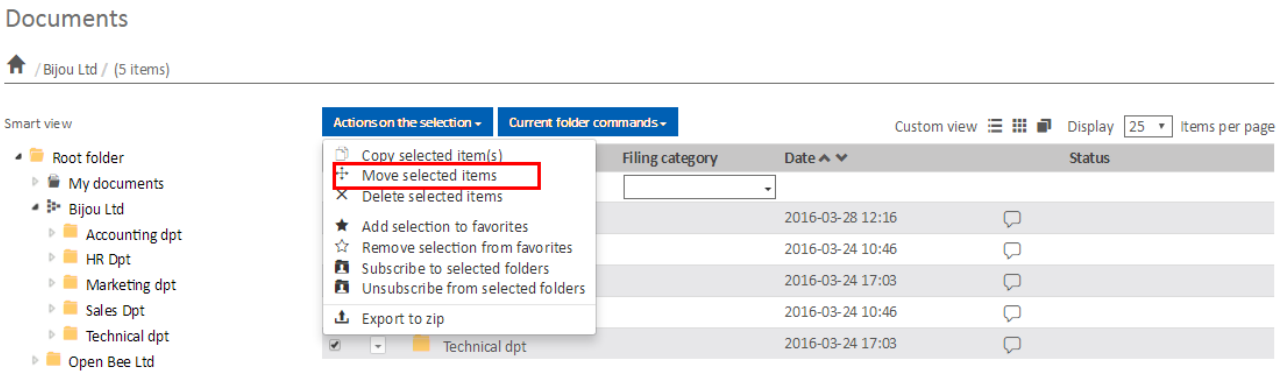


The following window appears:

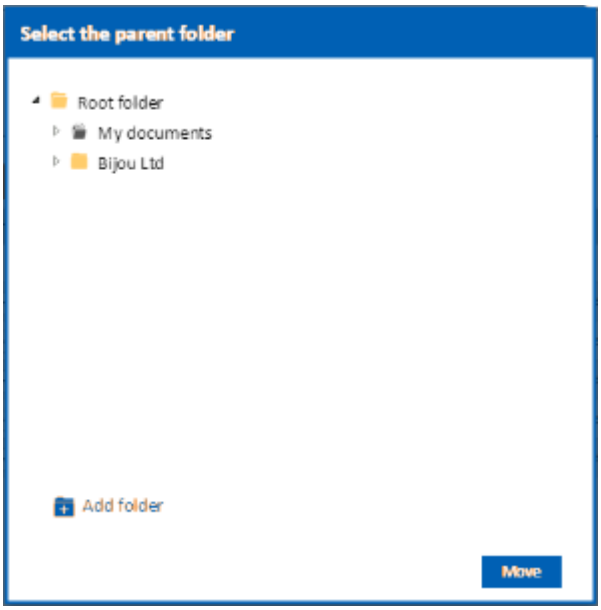


- Select the destination folder and click on the **"Copy"** button
- Once the items have been moved, a confirmation message appears.

Move the selection

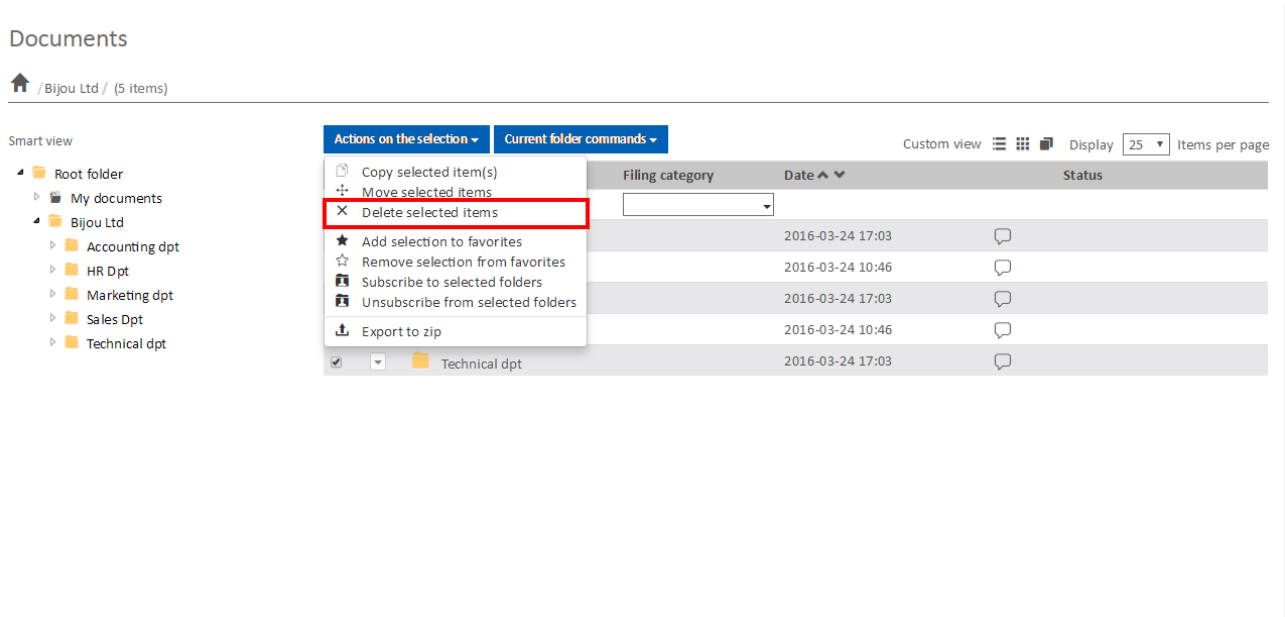


The following window appears:

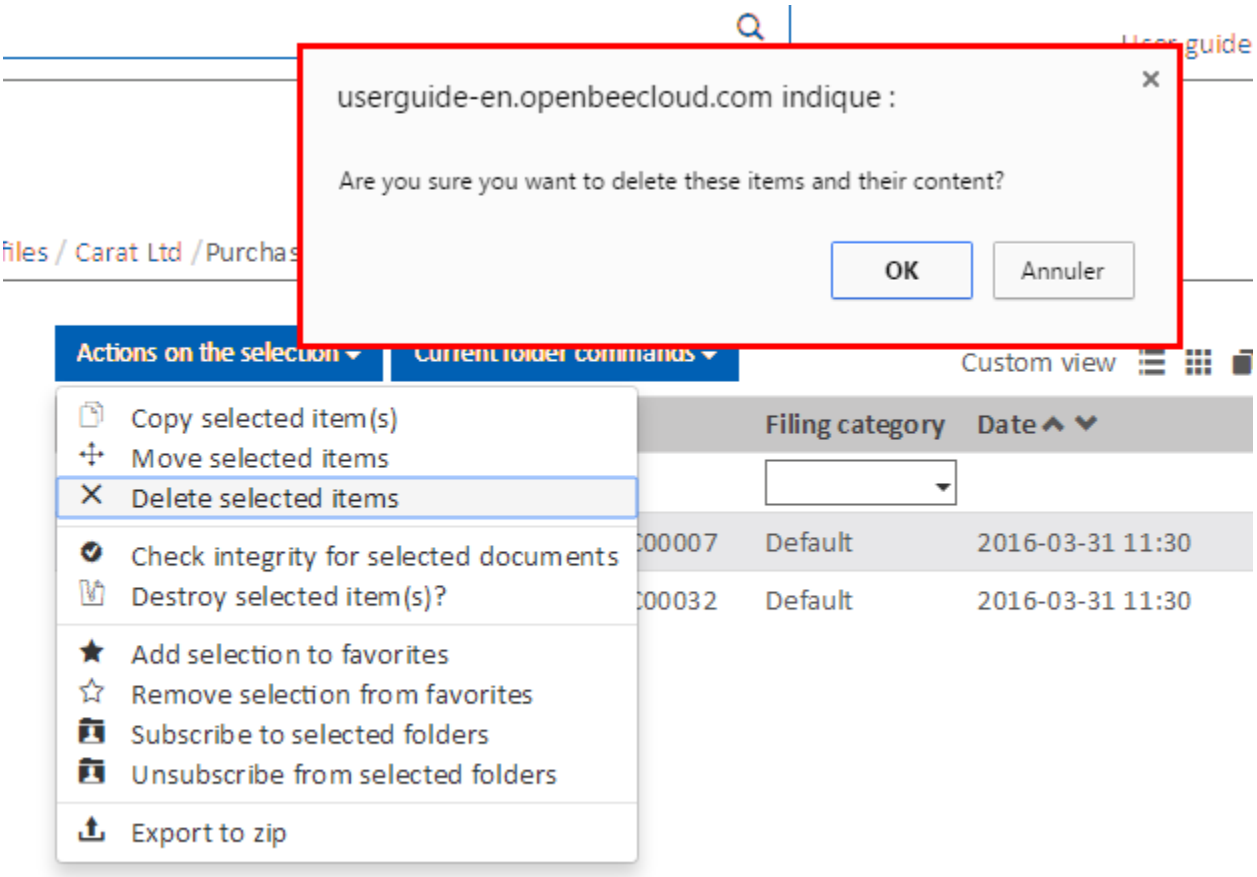


- Select the destination folder and click on the **"Move"** button
- Once the items are moved, a confirmation message appears.

Delete the selection



A confirmation message appears. Click "OK" to confirm the deletion of elements.



Deleted items are moved in a global system gecycle bin, which makes a restoration by the administrator .

Add the selection to favorites

Favorites management

Remove the selection from favorites

Favorites management

Subscribe to selected folders

Notifications management

Unsubscribe from selected folders

Notifications management

Export to zip

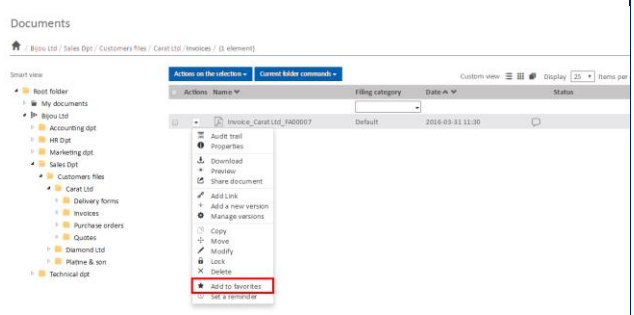
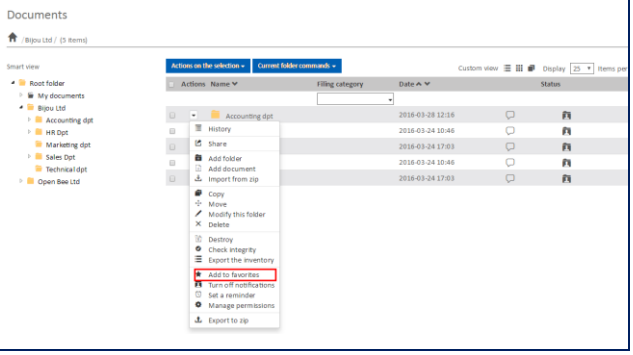
ZIP export

Favorites management

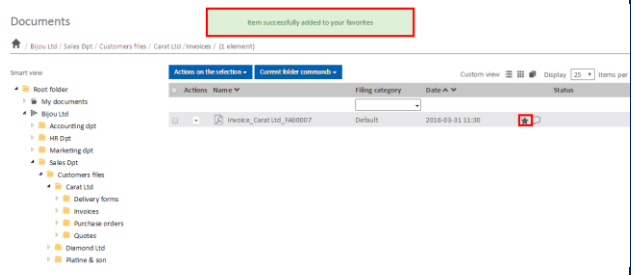
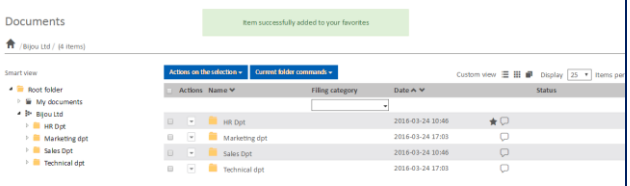
This feature allows quick access to folders and documents you frequently consult thanks to the dashboard **"My Favorites"** zone .

To add an element to **"My Favorites"**:

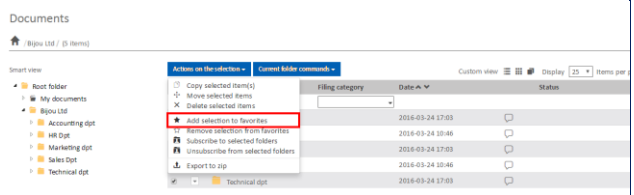
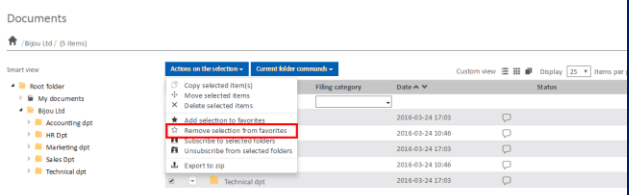
- Click on **" Add to favorites "** from the document or folder's drop-down menu .

Documents	Folders
	

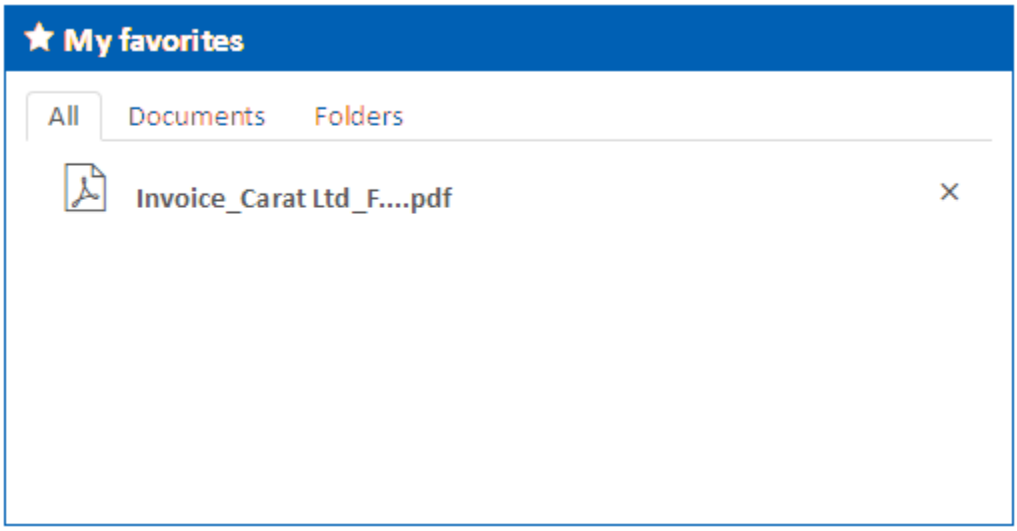
- A message confirms that the document has been added to favorites. The star icon means that the element is accessible from the favorites.

Documents	Folders
	

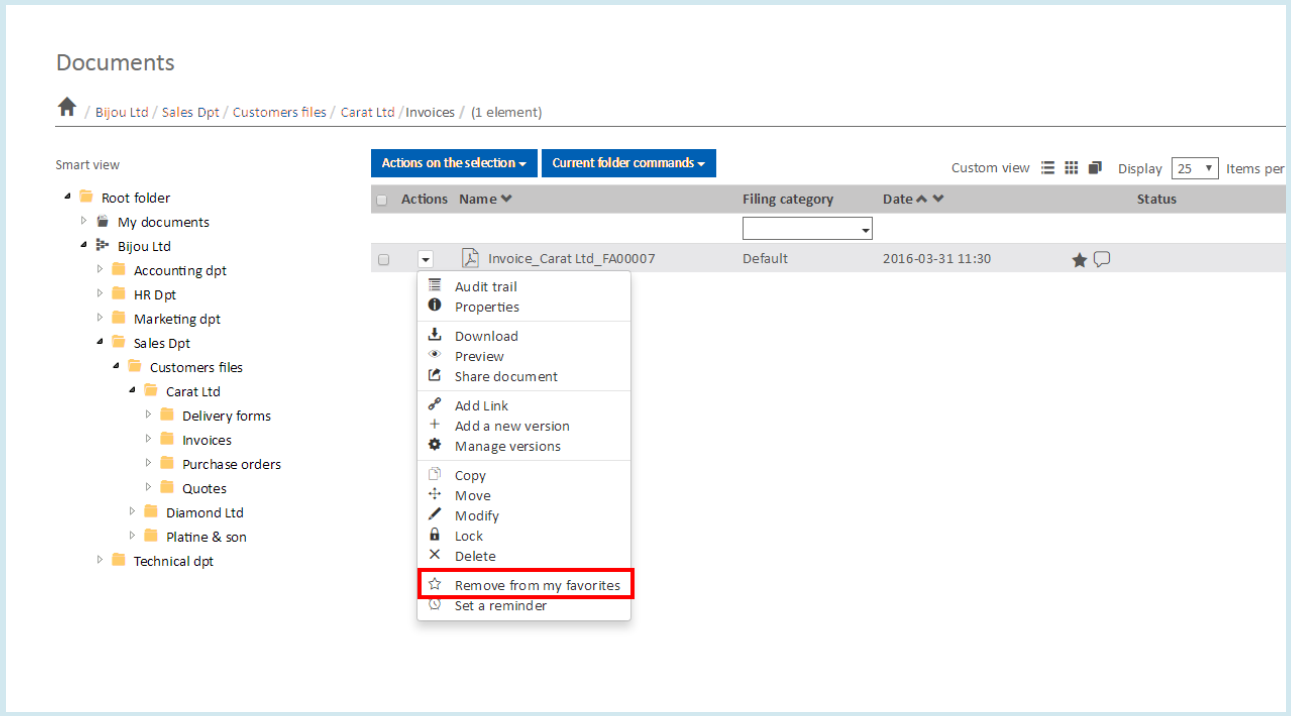
It is possible to add or remove more documents / folders from the favorites using an action on the selection:

Addition	Removal
 This operation has no effect on elements already belonging to favorites.	 This operation has no effect on elements that do not belong to the favorites.

To check the display of your items in **"My Favorites"**, go to the dashboard and check for items in **"My Favorites"**.



If you want to remove an item from your favorites, simply click on the cross on the right of the window or use the menu **"Remove from my favorites"**



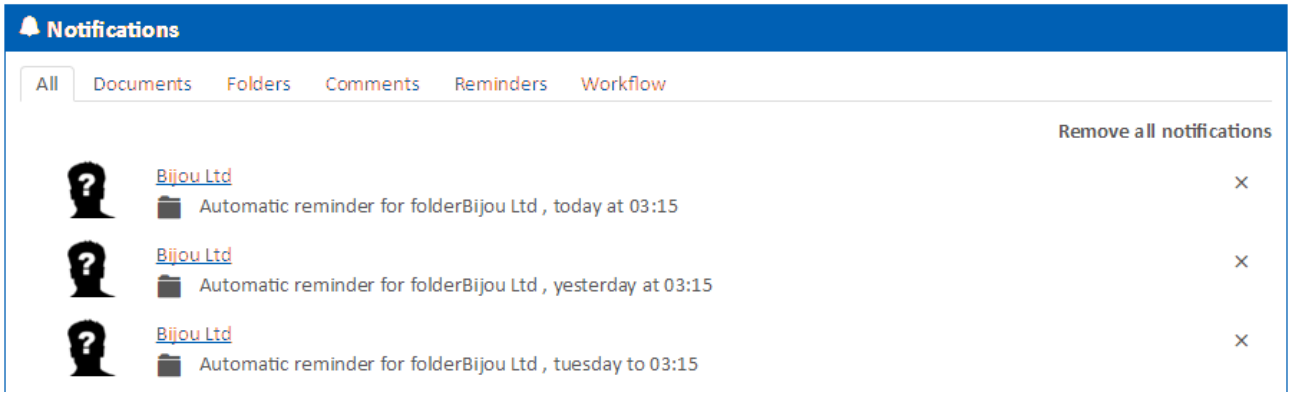
Notifications management

- Subscription and notification
- Triggering notifications
- Manage Subscriptions from the folders browsing interface or the search result
    - View subscriptions
    - Turn on notifications
    - Turn off notifications
    - Add or delete batch subscriptions
- Manage the subscriptions from the preferences
    - View all the subscriptions
    - Delete a subscription
    - Subscribe to a folder

Subscription and notification

The concept of subscription is to automatically notify one or more users that an event has taken place on a chosen document or folder.

Every time these events will occur, users will receive a new notification in the dashboard and a message via email (if enabled in user preferences) to inform them.



Triggering notifications

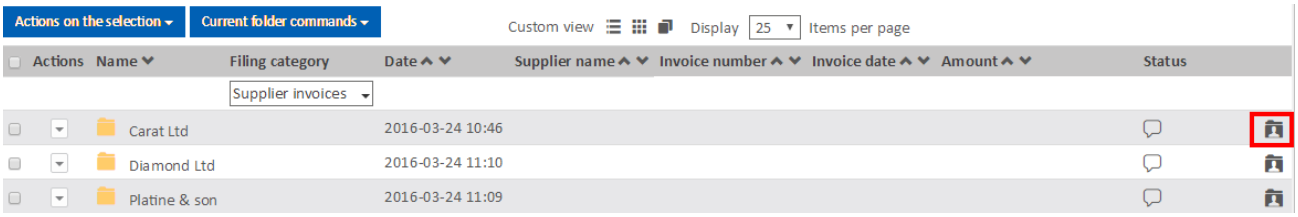
The actions that trigger notifications on files and documents are:

- Adding a folder or a document
- Modifying a folder or a document
- Removing a folder or a document
- Moving a folder or a document
- Adding a new version of a document
- Modifying an existing version
- Deleting a document version
- Downloading a document
- Copying a document

Manage Subscriptions from the folders browsing interface or the search result

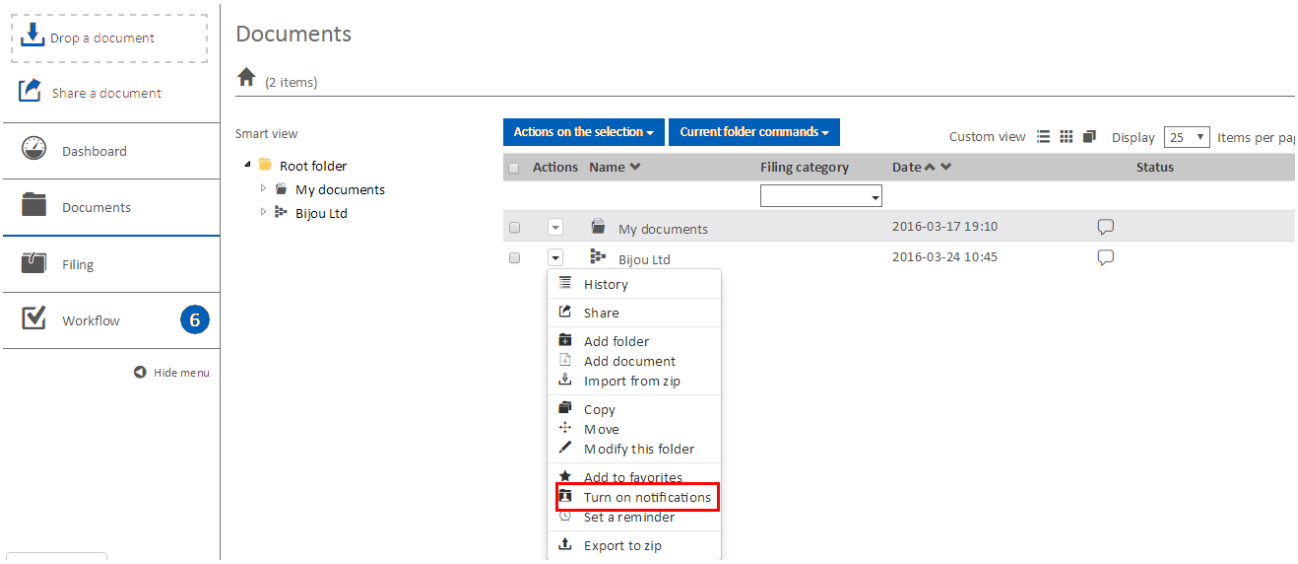
View subscriptions

An icon allows to identify subscribed folders during the browsing in the folders tree structure.



Turn on notifications

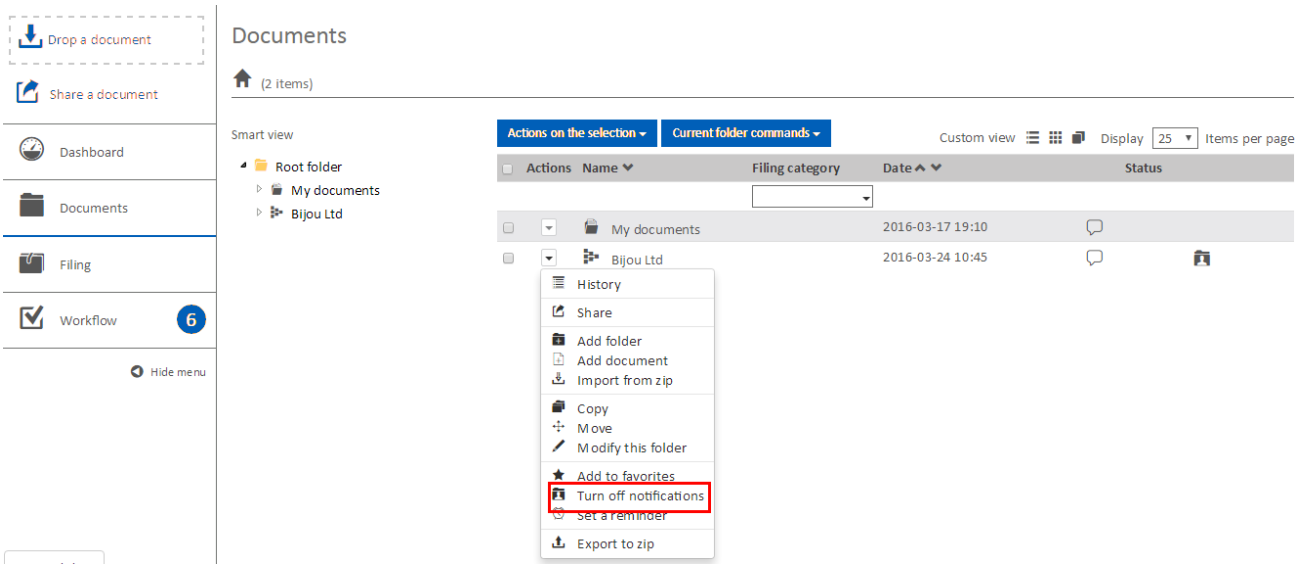
You will be then informed by notification in the dashboard and by email (if enabled in the users preferences) of any changes made in the future on the documents located in that folder.



> Subscriptions on folders are recursive .When you subscribe to a folder you also subscribe to all its sub-folders .

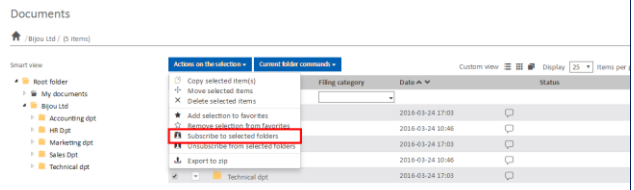
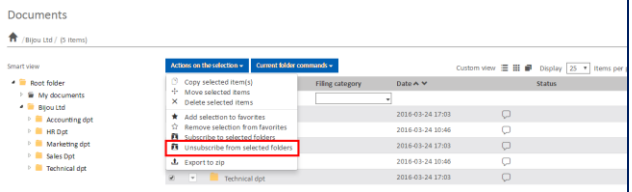
Turn off notifications

To disable a subscription to a folder,select the folder and select **"Turn off notifications"** from the drop-down menu.



Add or delete batch subscriptions

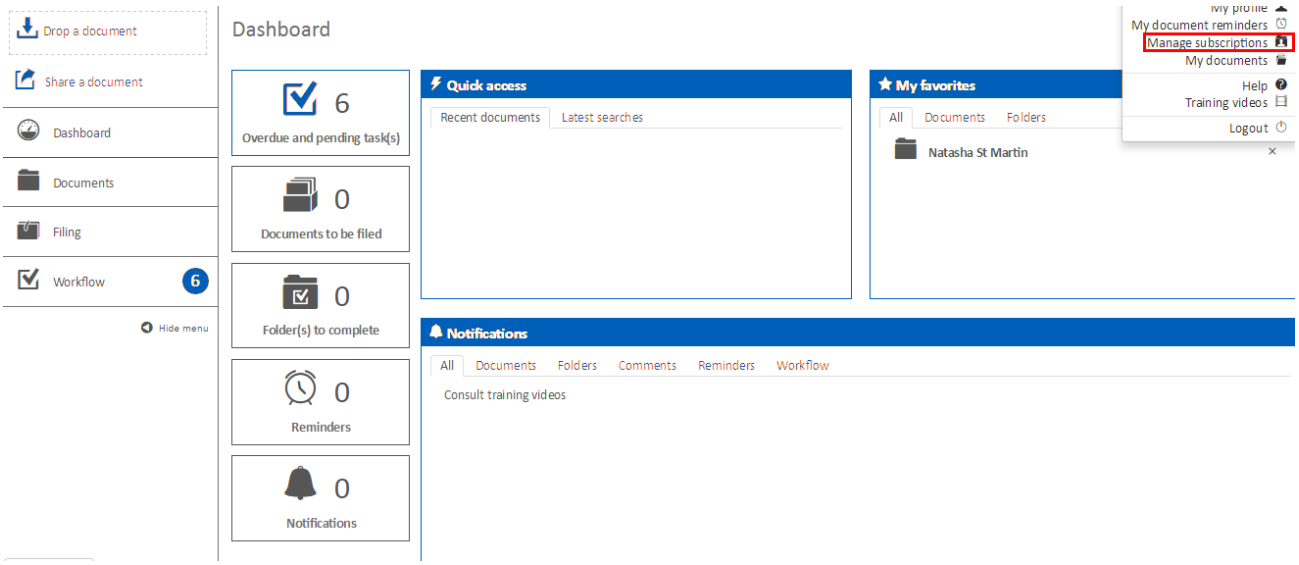
You can add or delete subscriptions in batches:

Subscribe to selected folders	Unsubscribe from selected folders
	
This operation has no effect on: • the documents • folders to which you have subscribed	This operation has no effect on: • The documents • folders to which you have not subscribed

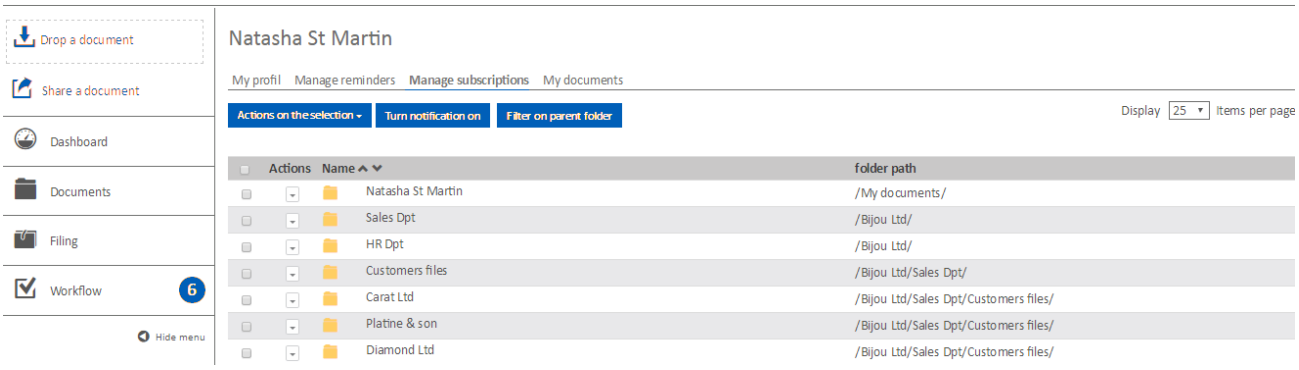
Manage the subscriptions from the preferences

View all the subscriptions

A page allows to view all your subscriptions.Click on your profile photo and select **"Manage subscriptions"** from the drop-down menu.



This page appears:



You can also filter the display to show only the subscriptions of a selected folder and sub-folders, using the button **" Filter on parent folder"** .

Delete a subscription

Select the folder, in the Actions menu select **"Unsubscribe from the folder "**

> Subscriptions on folders are recursive .When you delete a subscription to a folder, you also delete the subscription to all its sub-folders.

You can delete multiple subscriptions at the same time .For that select multiple folders. Then in the **"Actions"** column click on **"Actions on the selection"** and select **"Unsubscribe from selected folders"**.

Subscribe to a folder

Simply click on **"Turn on notifications "** and select the folder to subscribe in the tree structure.

Subscriptions on folders are recursive .When you subscribe to a folder you also subscribe to all its sub-folders .

Reminders on documents and folders

Reminders allow to be notified at a preset date.

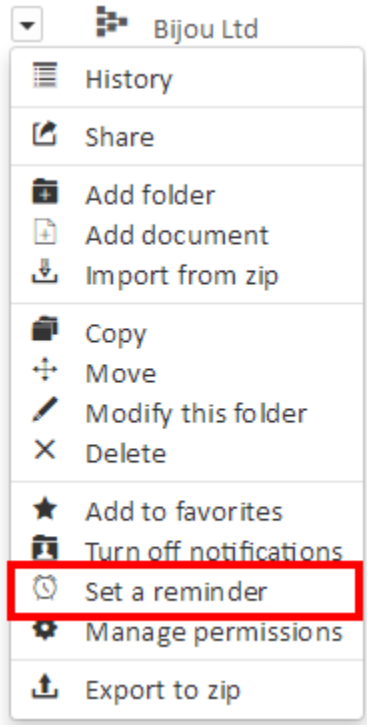
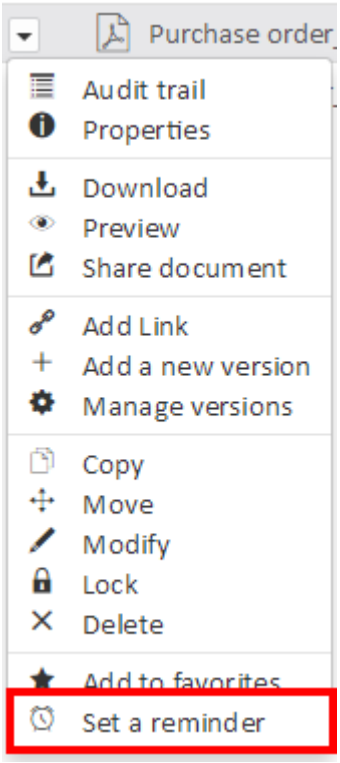
A reminder is associated to a folder or a document. It is an ideal tool for managing subscriptions and recurring contracts or for an automatic renewal.

- Create a reminder
- Edit or delete a reminder
- Reminders notification

Create a reminder

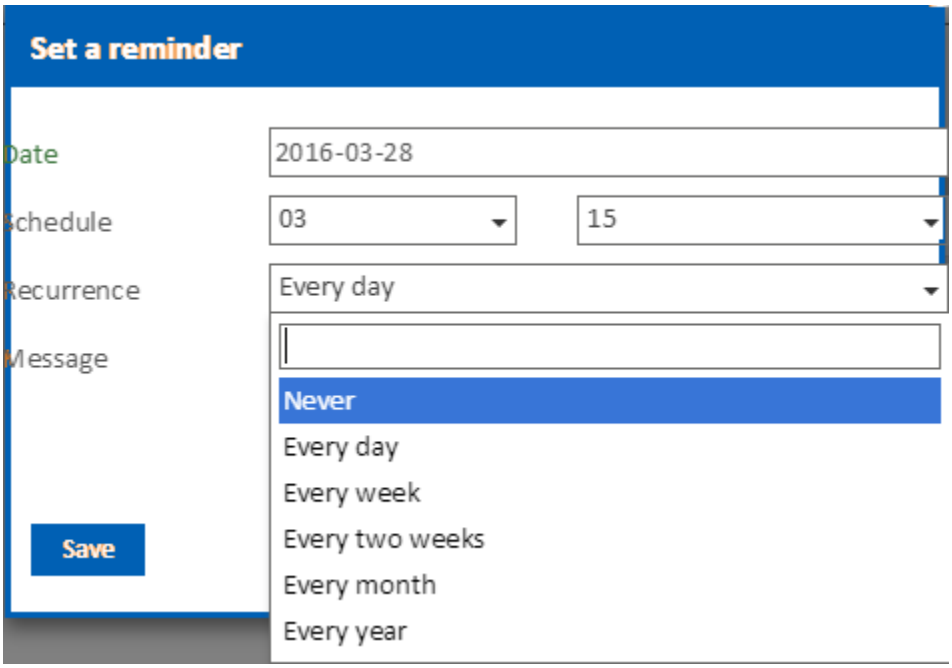
A reminder is created using the menu on the documents or folders .

This menu is accessible in the interface **"Documents"**, by choosing the traditional display mode or by list:

Menu on a folder	Menu on a document
	

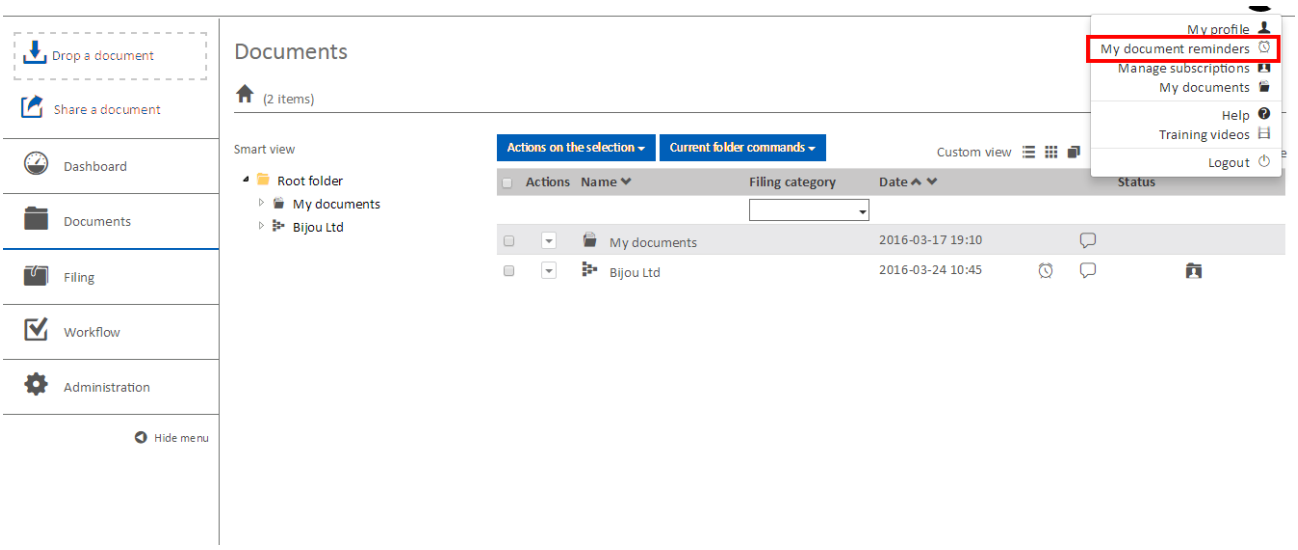
In both cases, the reminder creation form contains the following fields:

- Reminder date
- Reminder time
- An optional recurrence
- An additional message that will be displayed in the reminder



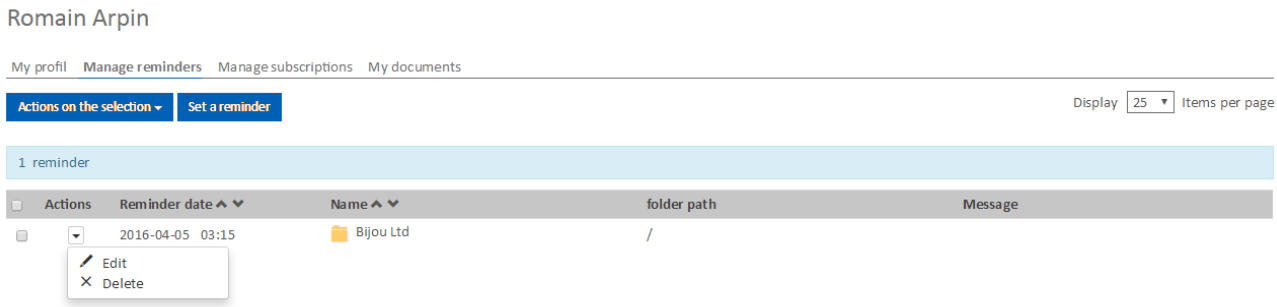
Edit or delete a reminder

To edit a reminder, click on your profile picture and select **"My document reminders"** from the drop-down menu.



A screen allows you then to view all your reminders.

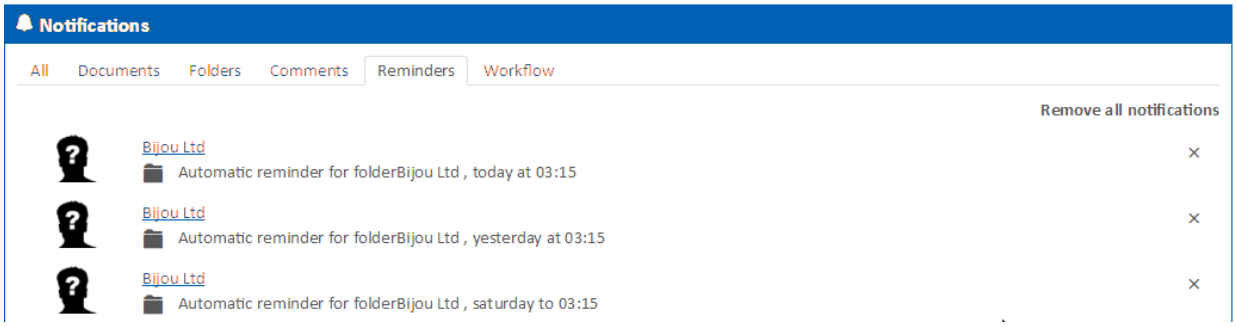
To delete or edit a reminder , simply click on the corresponding icon in the **"Actions"** column .



Reminders notification

When a reminder is activated by KOMI Doc, the user is notified:

- In the dashboard: "Reminders" tile

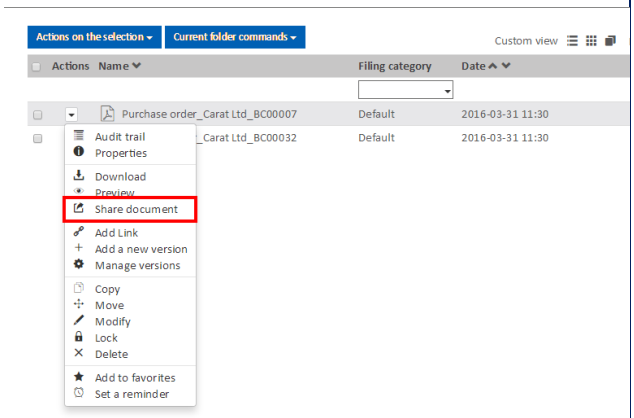


- By email, if the user activated the notification function by email in his preferences

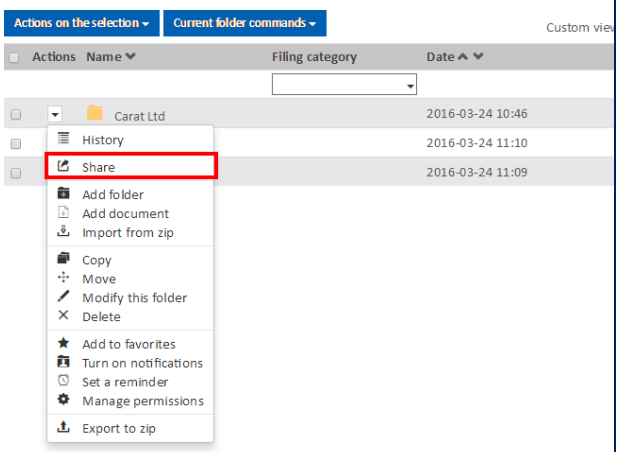
Share documents and folders

This feature allows to send an email containing a secured sharing link of a document or a folder to a list of recipients .

Partage d'un document

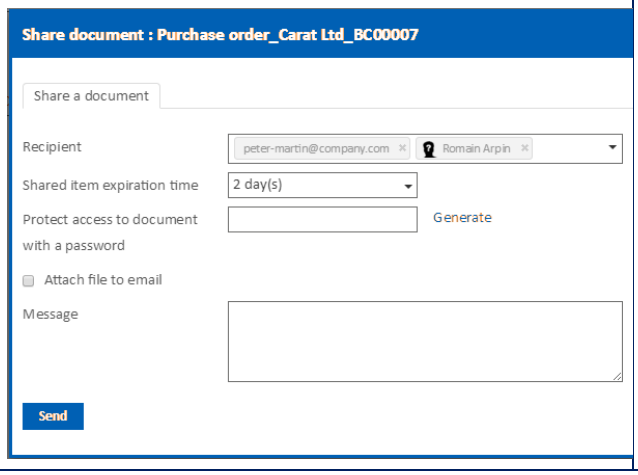


Partage d'un dossier

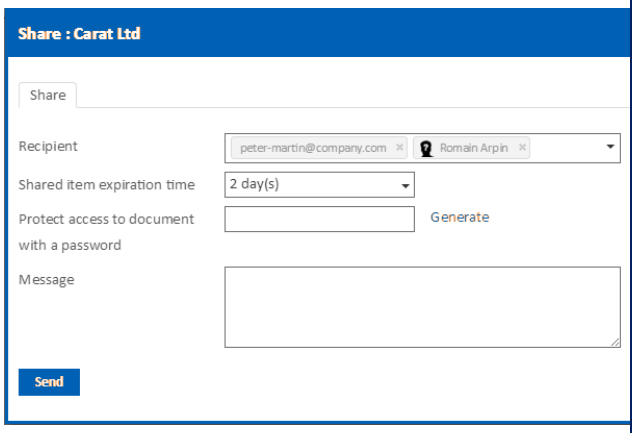


The next window allows to define the parameters of sharing for the document :

Sharing a document



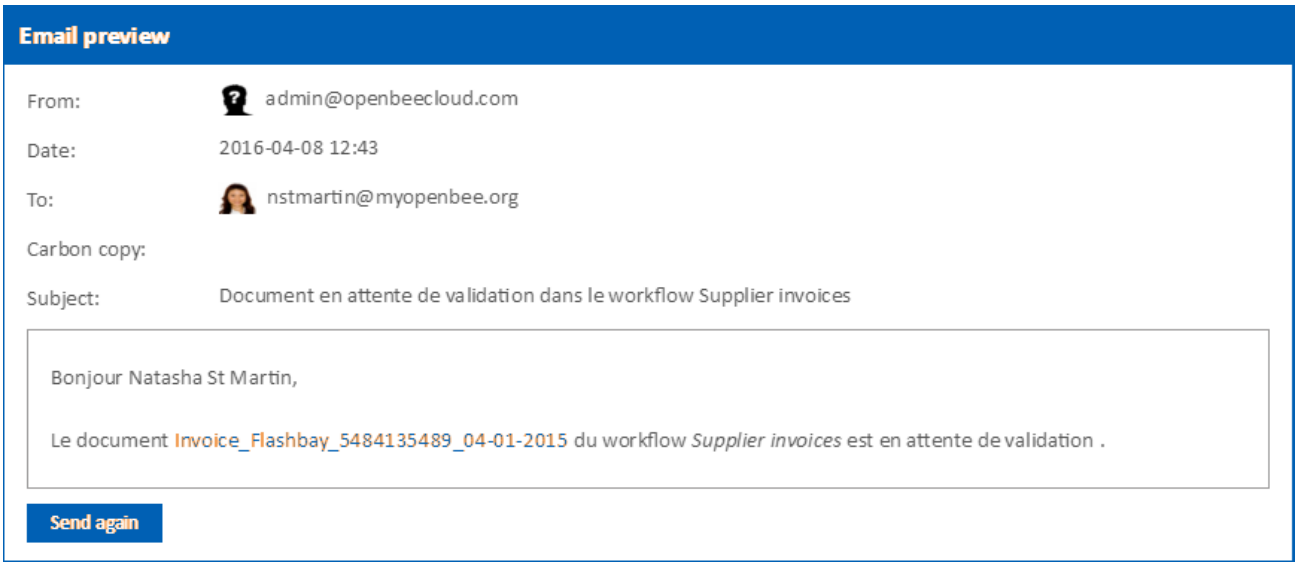
Sharing a folder



- Recipients :choose one or more contacts from:
  - groups
  - users
  - external contacts by entering their email addresses
- Expiration time: It is possible to revoke the access to the document at the end of a predefined duration
- Password: this password will be required for users to access the shared documents / folders

- Attach the file to the email: check this box to include the document as an attachment to the email. In this case, the **"Expiration time**" and **"Password"** options will not be applicable because the document will be communicated in the form of an attachment rather than in the form of secure Web link.
- Message : the entered text will be added in the sent email

Example of recieved e-mail:



- The external contacts can consult the document / folder without a user account via a secure link
- Users of the solution must identify themselves with their user account before consulting the document / folder.

Comments on documents and folders

The « **Add comment** » feature, allows to create threads around documents or folders.

This feature was created to provide a virtual space for conversation. Everyone may put comments and information on a document or folder.

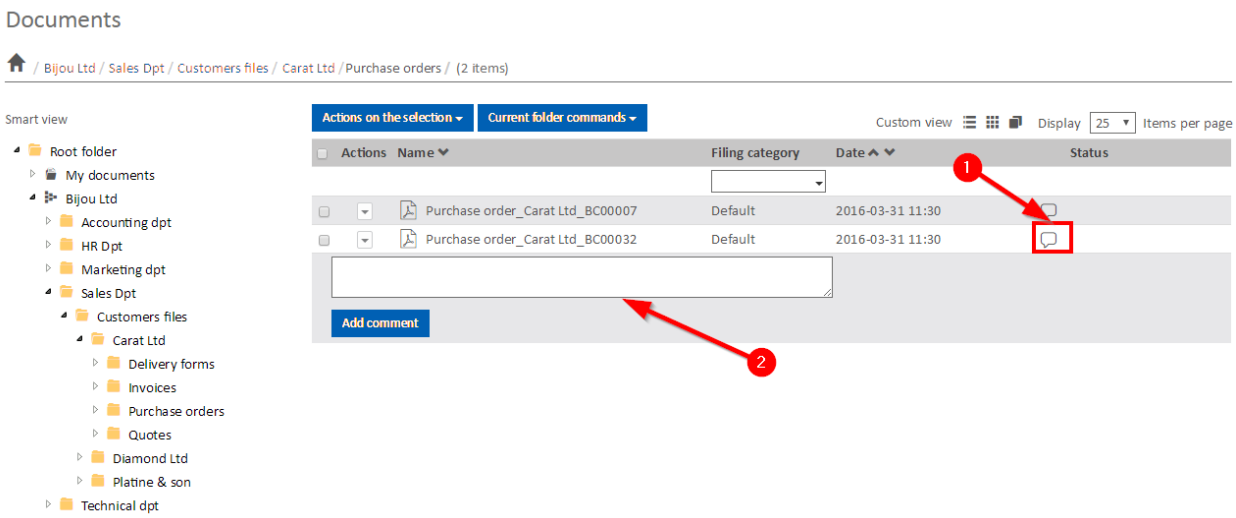
Each user can read at any time, the interventions of other colleagues and make his own contribution in the form of a comment.

Adding a comment allows to create a discussion on a document / folder or participate in it.

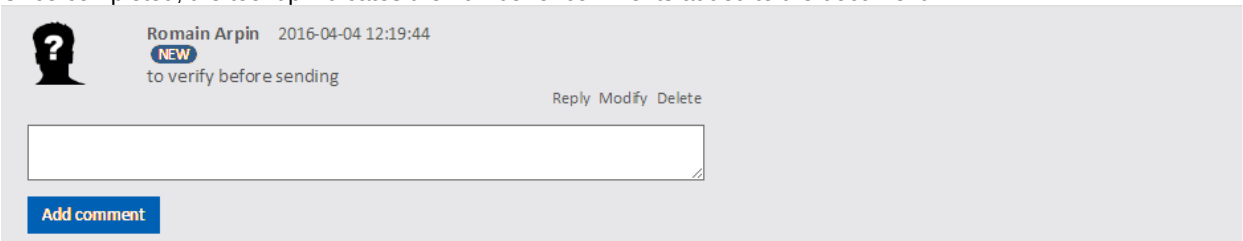
Adding comments can be made by an administrator or user (if the user has the necessary permissions).

To add a comment

- Click the tool-tip in the **"Status"** column of the concerned file or document,
- Add a comment



- If you want to « **Reply** », « **Modify** » or « **Delete** » your comment, click the links at the bottom of the comment
- Once completed, the tool-tip indicates the number of comments added to the document.



Documents links

- Link documents manually
- Batch documents linking

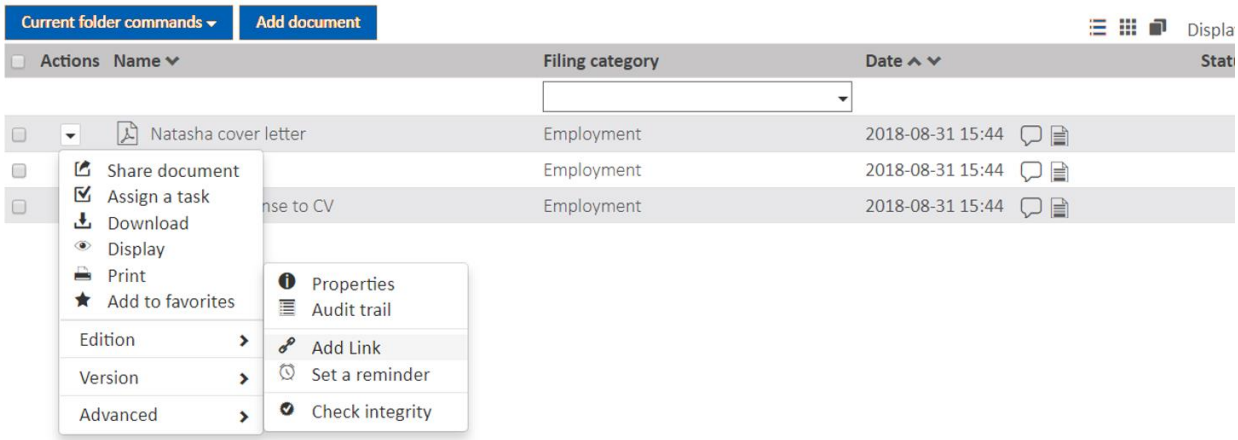
It can be useful to link two or several documents between them, especially if then concern a same subject but are stored in different folders.

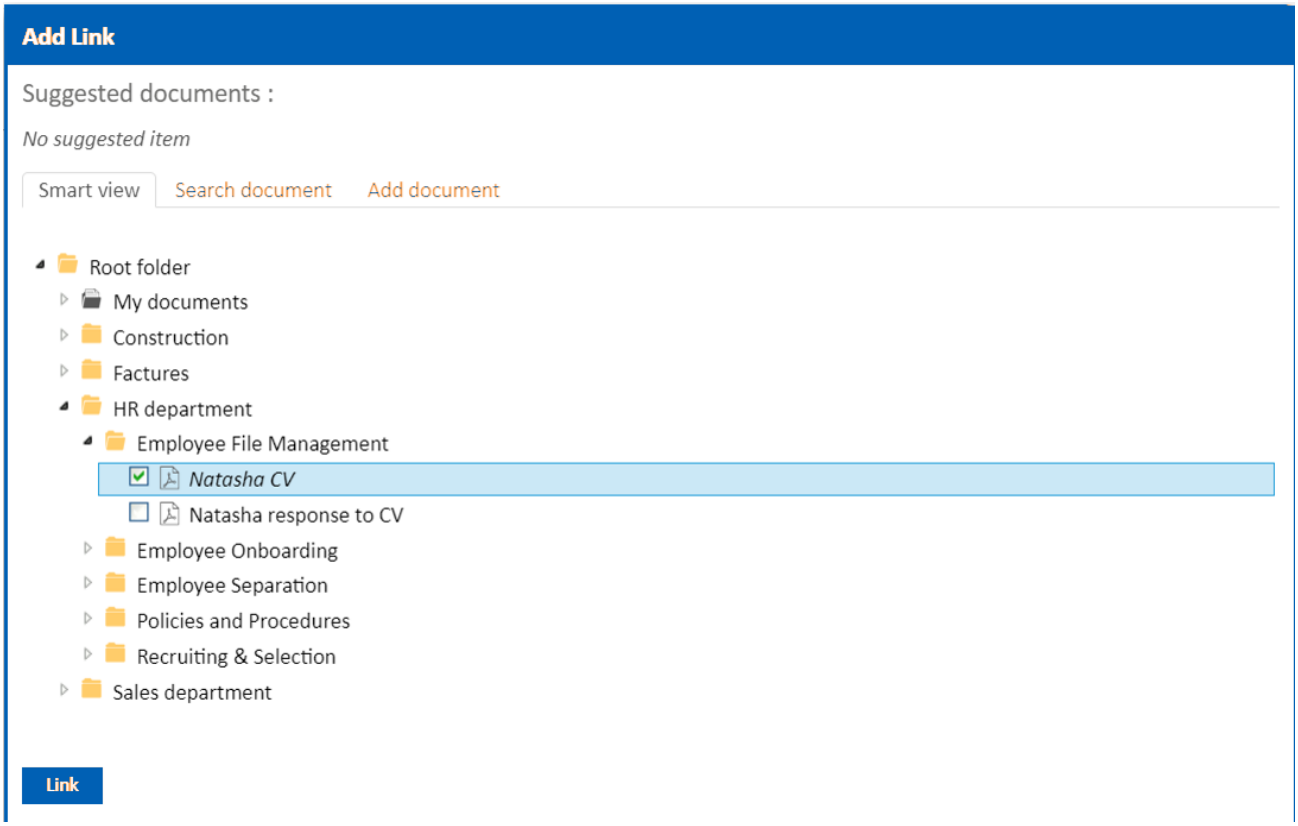
The "Link" feature enables to answer to this need.

Link documents manually

To add a link :

- Select the document you wish to link to another.
- Select "Add a link" in the context menu





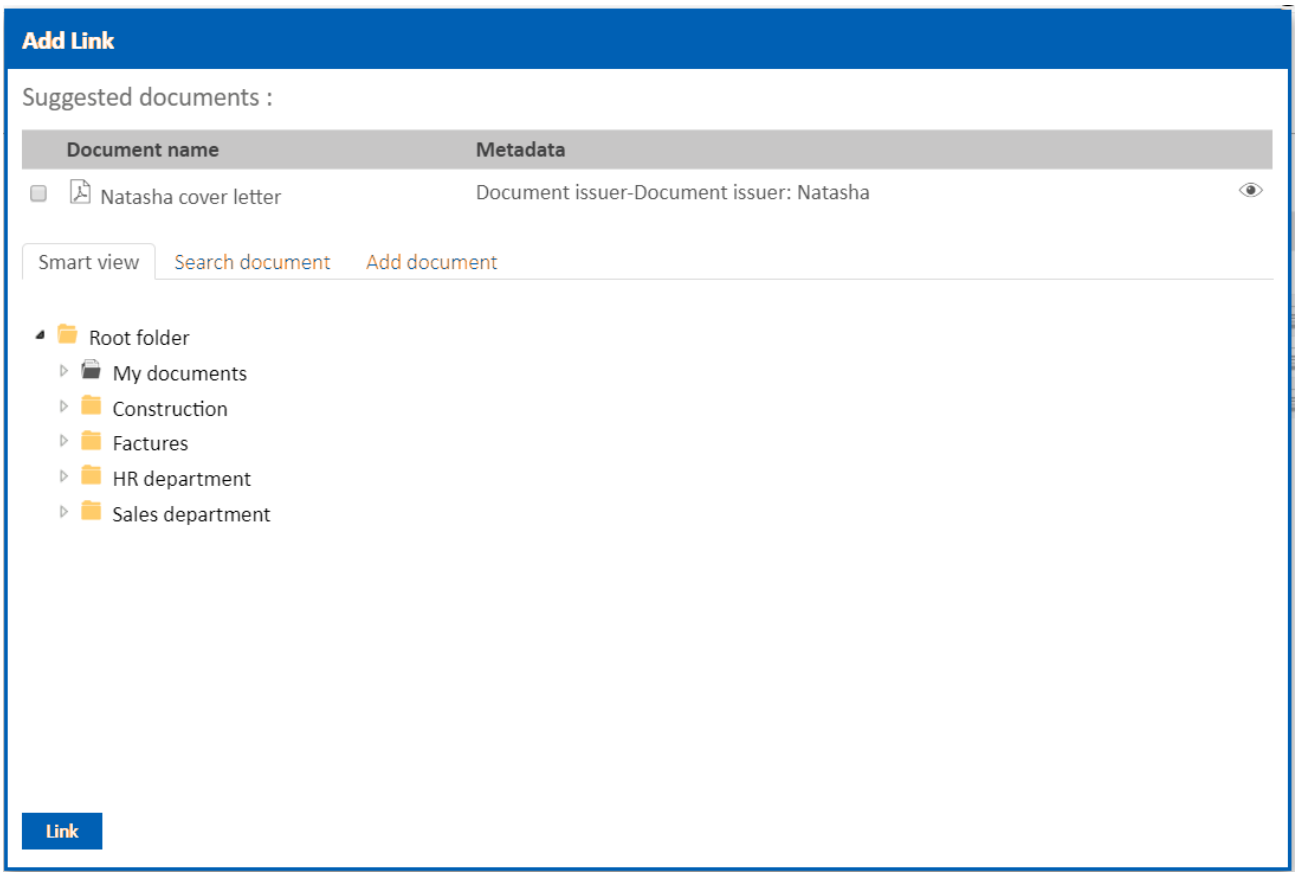
If similar documents are detected, they will be proposed in the Suggested Documents section.

To operate, the automatic document suggestion must be setup by an administrator.

Exemple :

A user wished to link an 100 € invoice from the Konica Minolta company.

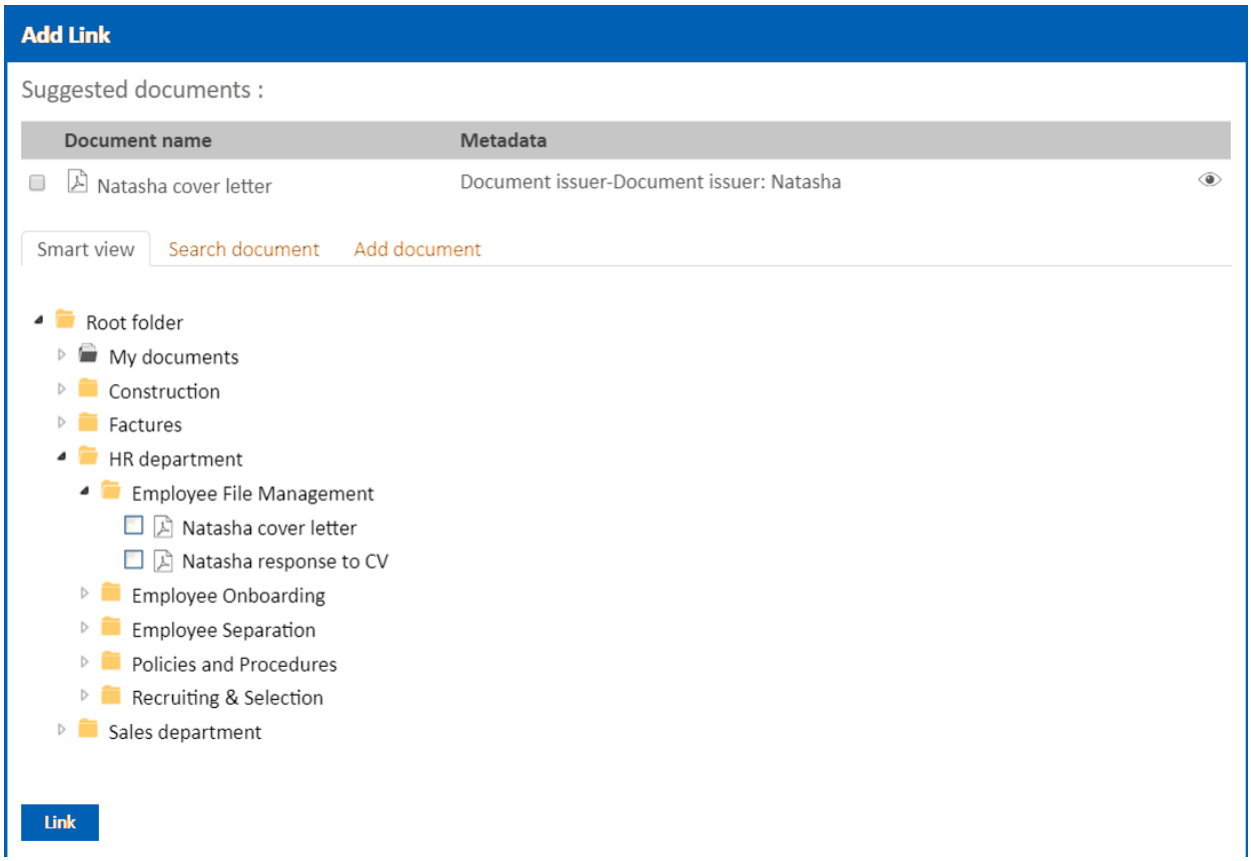
If a 100 € purchase order from Konica Minolta company is stored KOMI Doc, it will appear in the suggested documents section.



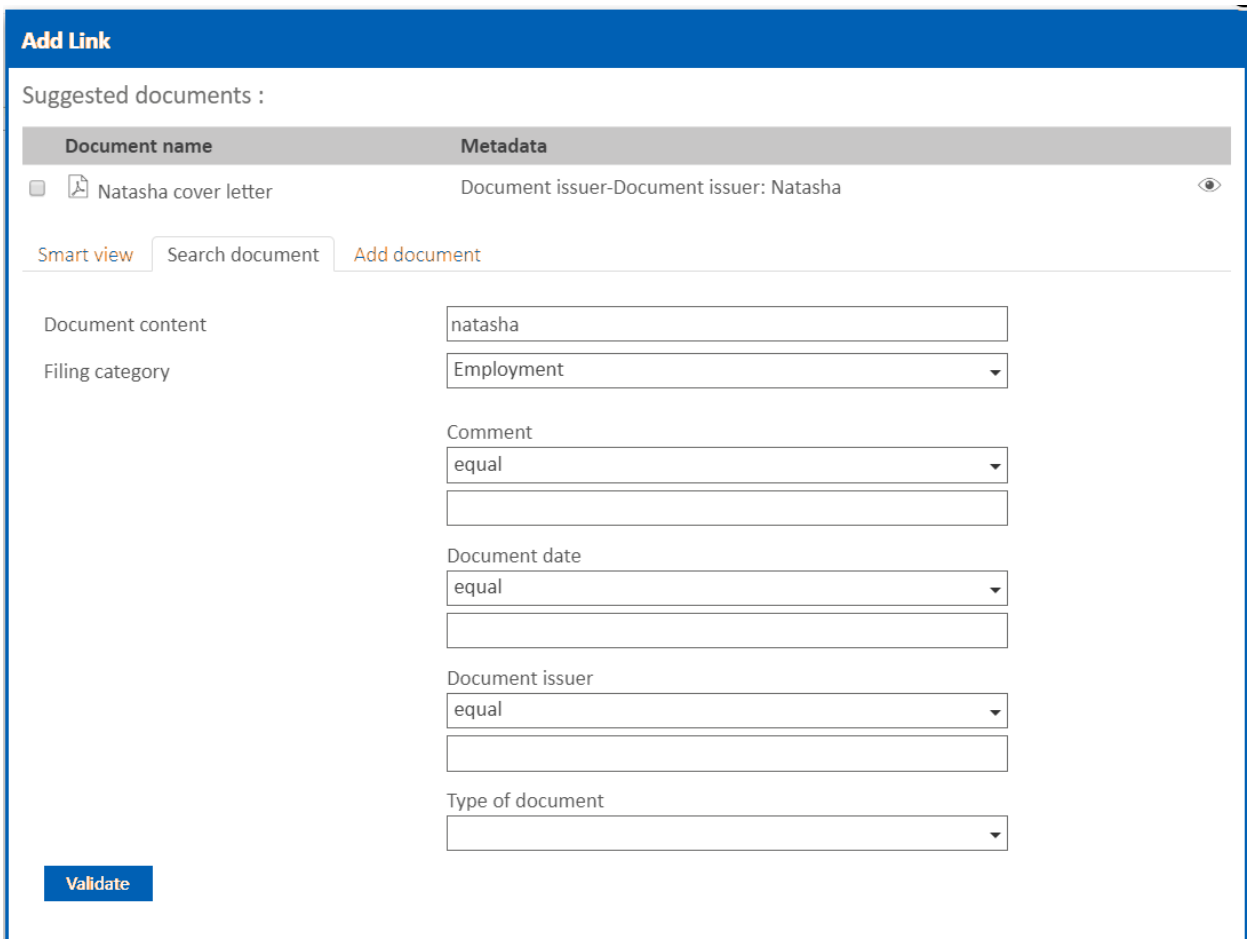
The suggested documents can be viewed by clicking on the eye icon on the screen right

To link a document that was not suggested, 3 options are available :

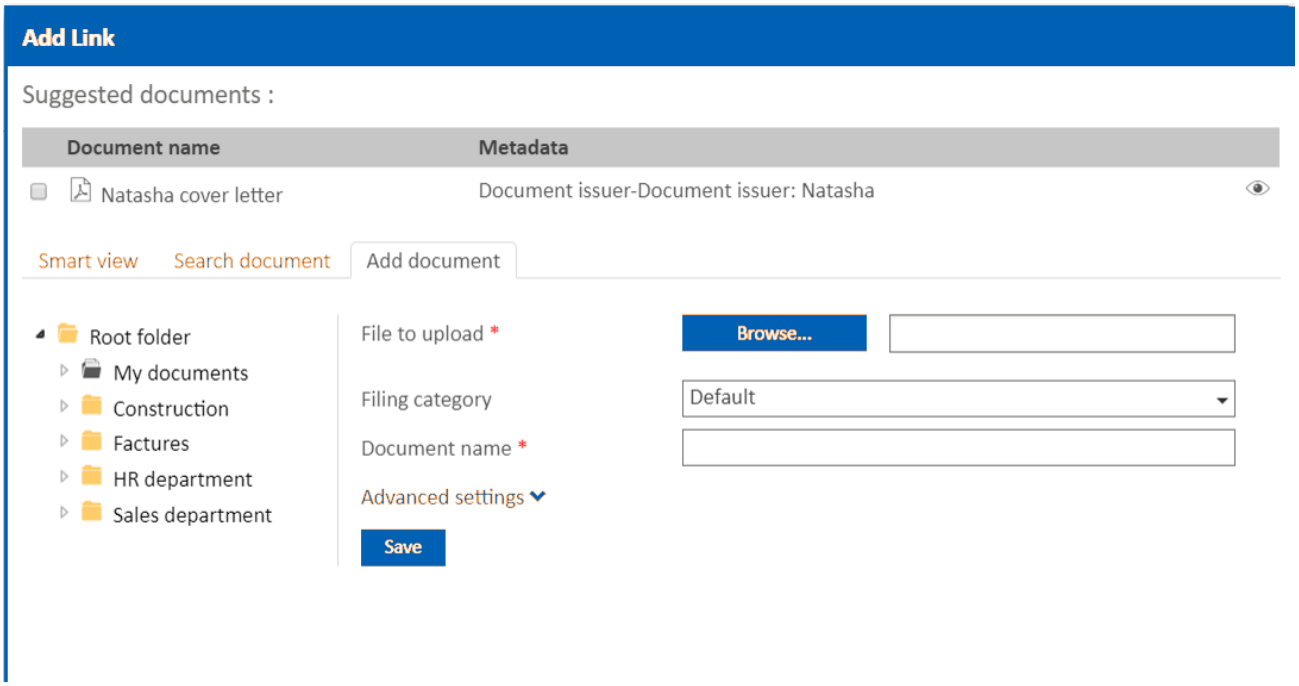
1. Browsing in the folders tree in order to select the documents to which you wish to link your document



2. Use the documents search, click on the "search documents" tab and select the search criteria and then validate



3. Add a new document, click on a "Add a document" from which you will find the add document form. The added document will then automatically be linked.



The clip icon appears automatically. This indicates that a link was done on this document.

Batch documents linking

The dynamic link feature enables

1. the documents suggestions when linking a document manually (see above)
2. the batch documents linking analyzed as similar by the system. In that case, a clip icon with the number of documents "To link" appears on the dashboard. Click on this icon to access to the batch linking screen.

This screen enables to view all the linked documents and documents awaiting to be linked, depending on the rules defined in the dynamic links administration.

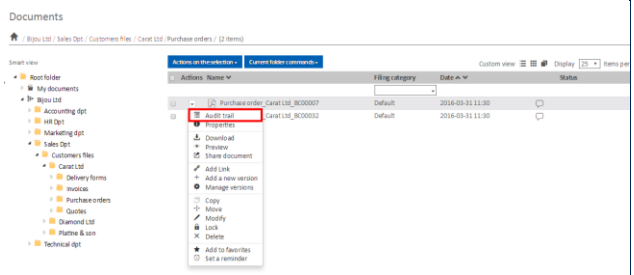
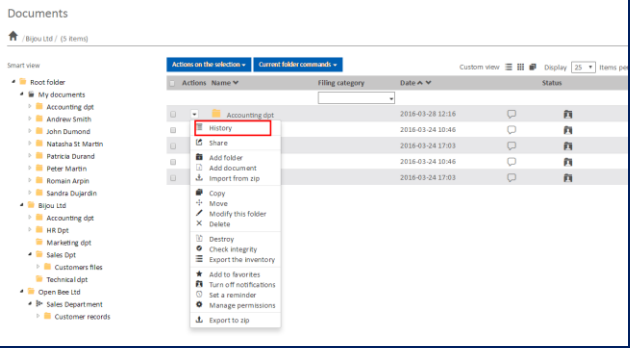
1. You can add a filter by dynamic link rule
2. The action on the selection enables to batch link or unlink documents. Select the documents you wish with the checkboxs.
3. The documents to link are displayed in two statuses : to link or linked, you can add filter on the display depending on this status.
4. A "lonely" document is a document for which the system is expecting a document to link but no document was found. You can use the context menu to add a new document and link it, in the same way described in the manual link described above.
5. A document with one or several documents and with a "to link" status is a document for which the system thinks to have found the linked document. You then only have to check, click on the checkbox and batch link. Or simply click on the "Link" link.

6. A document with one or several documents and with a "linked" status is an already linked document. You can unlink it.

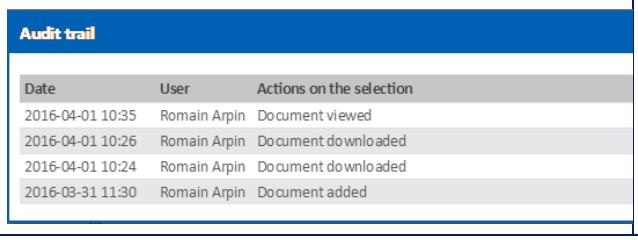
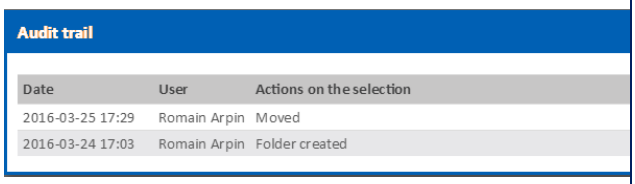
Documents and folders history

All actions taken on a folder or file (modification, deletetion, downloading ...) are saved in actions transactions.

This history is available from the menu on documents and folders.

Document	Folder
	

A window allows to view the various actions performed on the item as well as the date and the user who performed the operation.

Document	Folder
	

Audit trail

Date	User	Actions on the selection
2016-04-01 10:35	Romain Arpin	Document viewed
2016-04-01 10:26	Romain Arpin	Document downloaded
2016-04-01 10:24	Romain Arpin	Document downloaded
2016-03-31 11:30	Romain Arpin	Document added

Audit trail

Date	User	Actions on the selection
2016-03-25 17:29	Romain Arpin	Moved
2016-03-24 17:03	Romain Arpin	Folder created

ZIP export

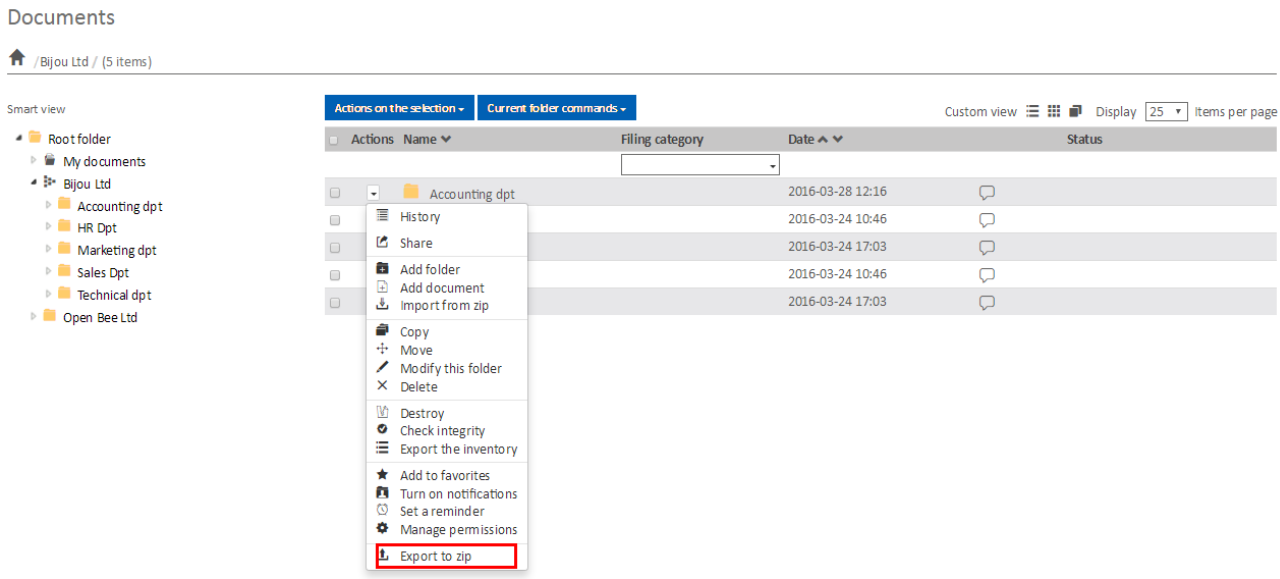
The ZIP export allows to download documents and folders to a ZIP archive.

- This feature **is not** intended to provide a way to export mass data. Other tools such as WebDAV connectivity are more suitable for this kind of operation.
- To ensure optimum functioning, the export volume is limited to 10MB.

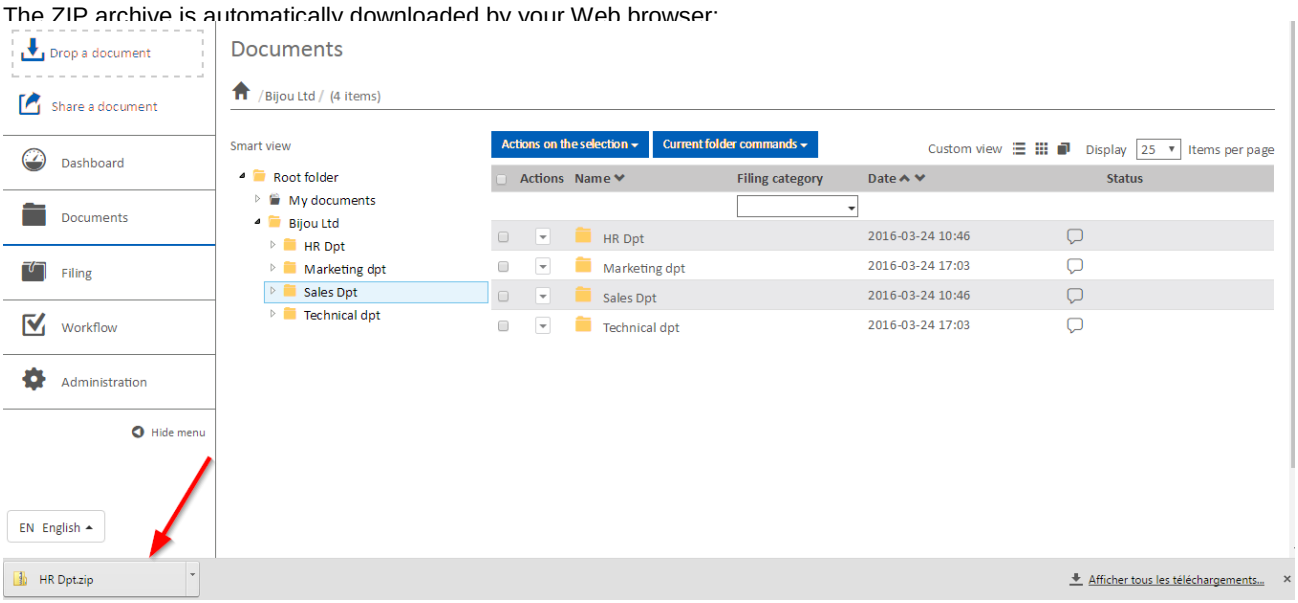
- Export a folder
- Export a selection

Export a folder

The export is recursive: all sub-folders and documents contained in the folder will be exported.



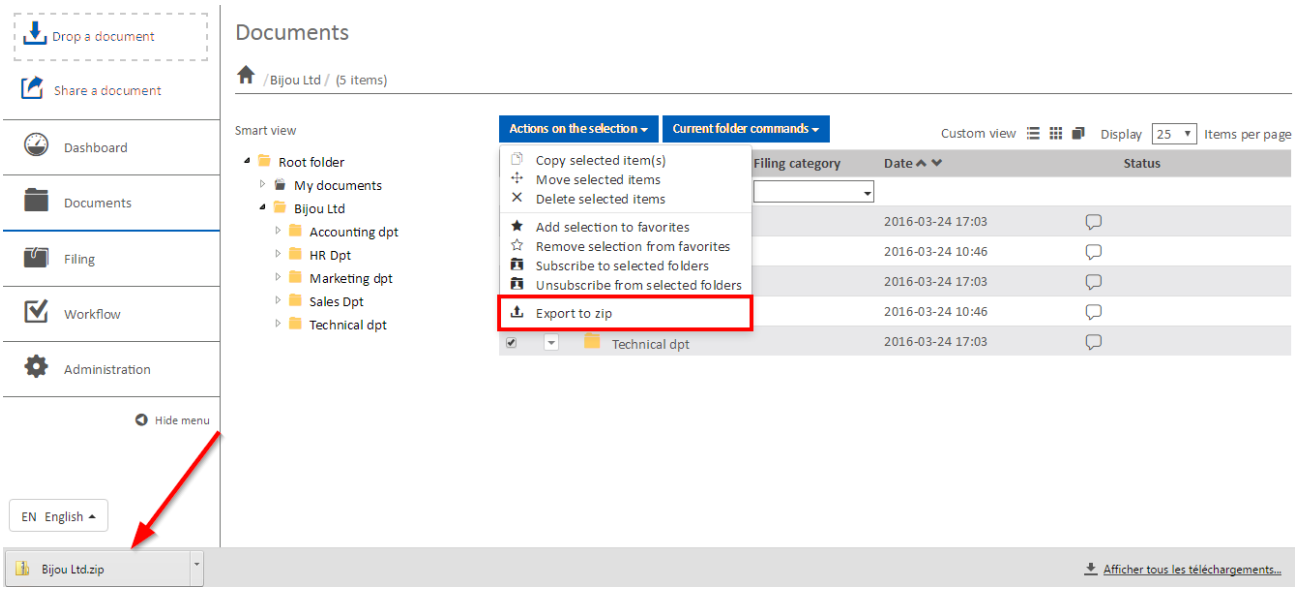
The ZIP archive is automatically downloaded by your Web browser:



Export a selection

The created ZIP archive will contain all selected documents and folders.

The export is recursive: all sub-folders and documents contained in the selected folders will also be exported.



Metadata CSV export

This feature allows to recover, in a CSV file (editable by Excel) information and a set of documents metadata.

- Metadata export from search results
- Metadata export from a folder

Metadata export from search results

1. Make a search using a filter on a filing category,
2. Select the documents to be exported and click on **"Export metadata of the selected documents (CSV)"**
3. A CSV file is downloaded by your browser

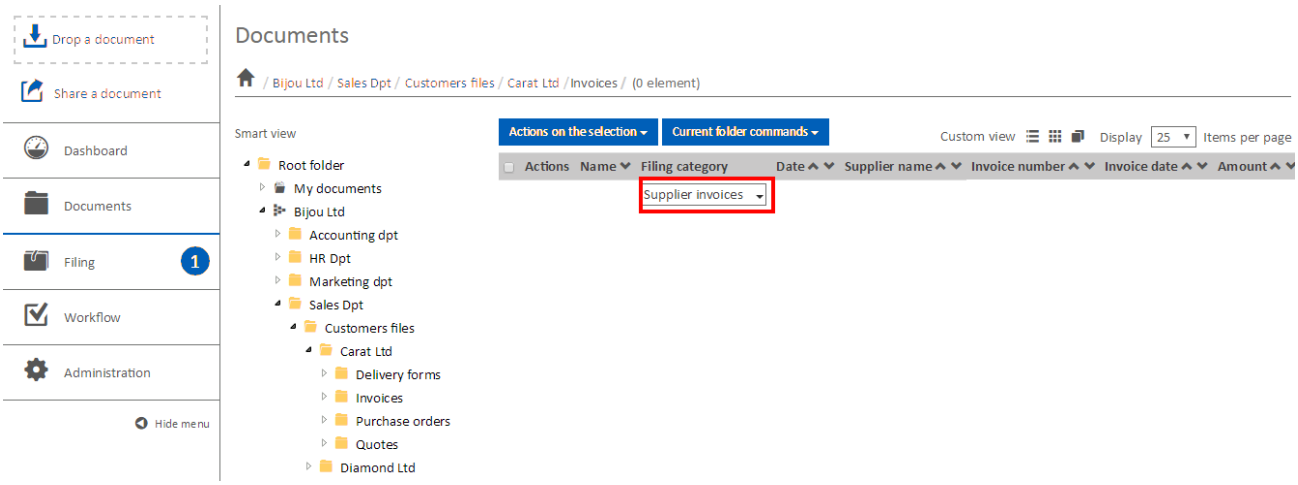
Open the file to edit it in Excel:

	A	B	C	D	E	F	G	H	I
1	Extension	Nom	Chemin	Date	Règle de classement	Client	Numéro de BC	Date	
2	pdf	Bon de Commande_Grenat pour toi_BC00006_10_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Grenat pour toi	BC00006	10/01/2011	
3	pdf	Bon de Commande_Platine & fils_BC00010_23_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Platine & fils	BC00010	23/01/2011	
4	pdf	Bon de Commande_La Topaze Lyonnaise_BC00014_04_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	La Topaze Lyonnaise	BC00014	04/01/2011	
5	pdf	Bon de Commande_Perles parisiennes_BC00016_01_02_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Perles parisiennes	BC00016	01/02/2011	
6	pdf	Bon de Commande_Horlogerie Ceram_BC00019_16_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Horlogerie Ceram	BC00019	16/01/2011	
7	pdf	Bon de Commande_Directy Sarl_BC00020_20_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Directy Sarl	BC00020	20/01/2011	
8	pdf	Bon de Commande_Opale_BC00022_12_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Opale	BC00022	12/01/2011	
9	pdf	Bon de Commande_Deutschland's Bijoux_BC00031_05_03_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Deutschland's Bijoux	BC00031	05/03/2011	
10									
11									
12									
13									

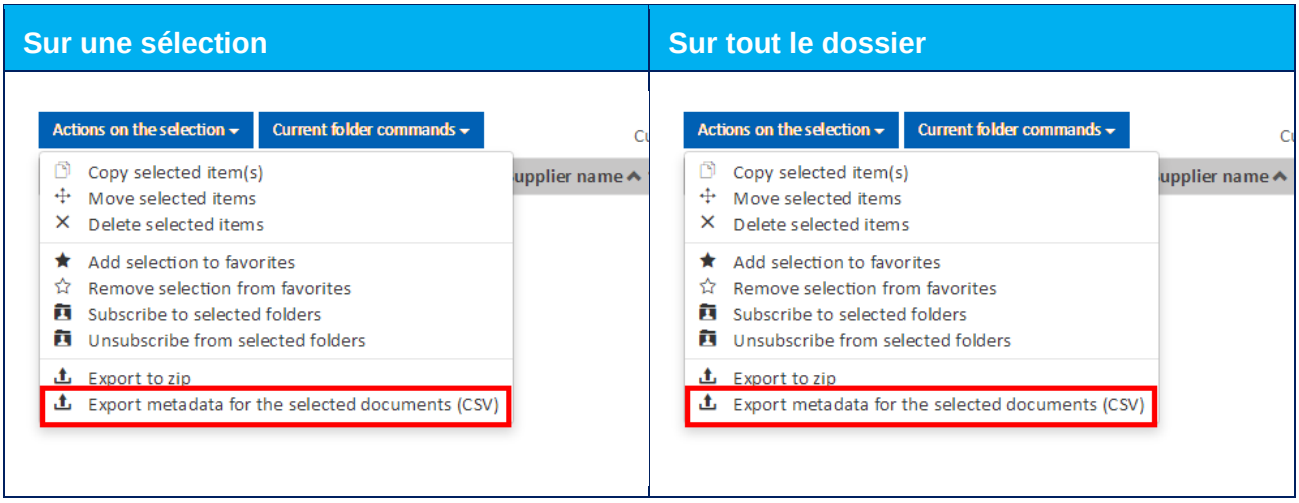
If the search isn't carried out to a filing category, the export will not be available.

Metadata export from a folder

Select a filing category:



Export metadata from the menu on the folder or the **"Actions on the selection"** menu:



The CSV file is automatically downloaded by your Web browser and edited in Excel.

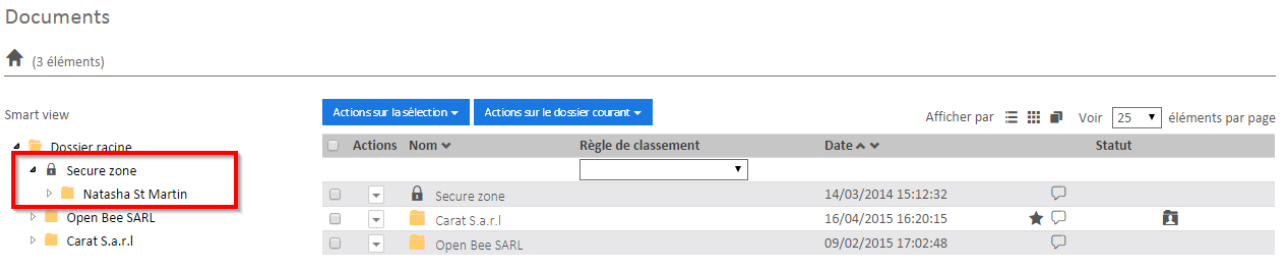
	A	B	C	D	E	F	G	H	I
1	Extension	Nom	Chemin	Date	Règle de classement	Client	Numéro de BC	Date	
2	pdf	Bon de Commande_Grenat pour toi_BC00006_10_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Grenat pour toi	BC00006	10/01/2011	
3	pdf	Bon de Commande_Platine & fils_BC00010_23_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Platine & fils	BC00010	23/01/2011	
4	pdf	Bon de Commande_La Topaze Lyonnaise_BC00014_04_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	La Topaze Lyonnaise	BC00014	04/01/2011	
5	pdf	Bon de Commande_Perles parisiennes_BC00016_01_02_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Perles parisiennes	BC00016	01/02/2011	
6	pdf	Bon de Commande_Horlogerie Ceram_BC00019_16_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Horlogerie Ceram	BC00019	16/01/2011	
7	pdf	Bon de Commande_Directy Sarl_BC00020_20_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Directy Sarl	BC00020	20/01/2011	
8	pdf	Bon de Commande_Opale_BC00022_12_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Opale	BC00022	12/01/2011	
9	pdf	Bon de Commande_Deutschland's Bijoux_BC00031_05_03_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Deutschland's Bijoux	BC00031	05/03/2011	
10									
11									
12									
13									

User folder

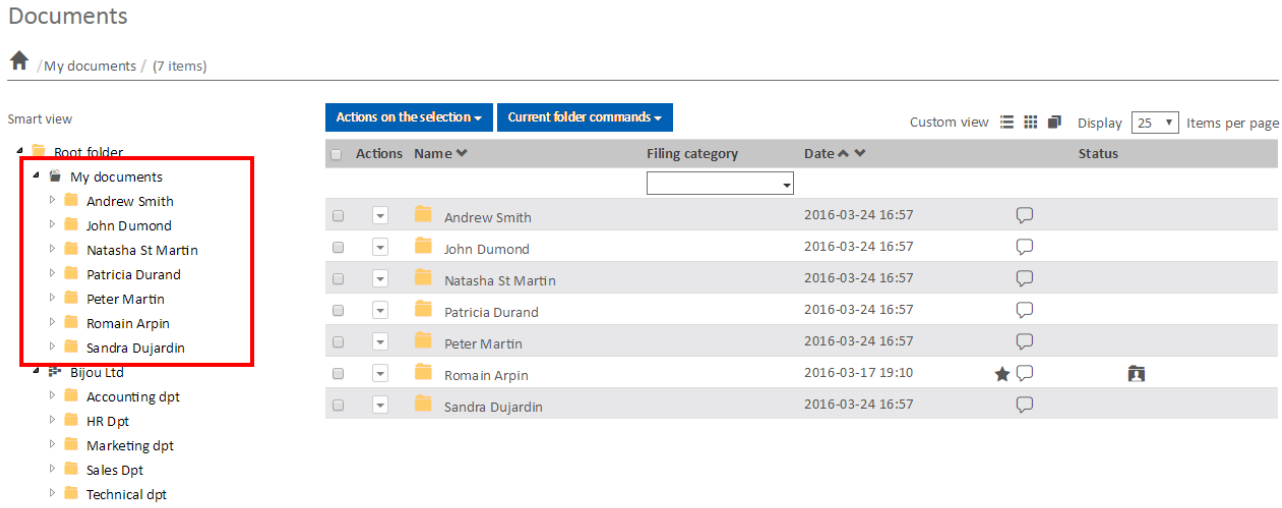
A **"My Documents"** folder is automatically created in KOMI Doc. It contains a personal folder for each user of KOMI Doc.

Only the user has access to his personal folder. Other users therefore have no access to his folder. The administrator can also access this folder.

Seen from a user account, this one has only access to his folder:

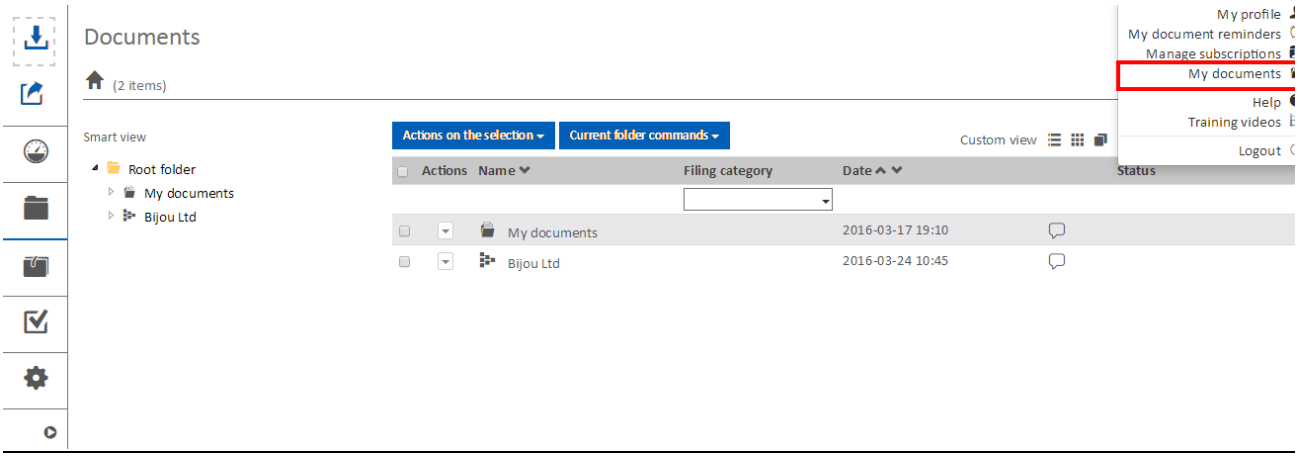


Seen from an administrator account, this one has access to all users' personal folders and sub-folders :



The administrator can change this setting in permission management on folder

The user folder is also available from the user menu



Acces via the WebDav protocol

KOMI Doc is compatible with the **WebDAV** protocol.

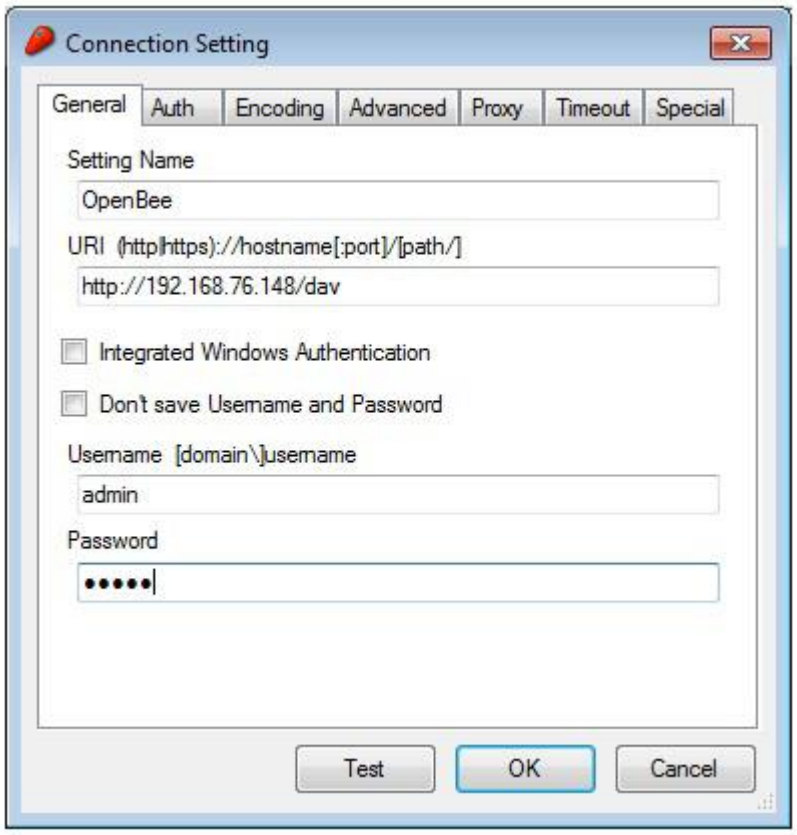
The WebDav tool configuration

Example: *CarotDAV* allows managing its files to various cloud services in addition to the uploading and downloading.

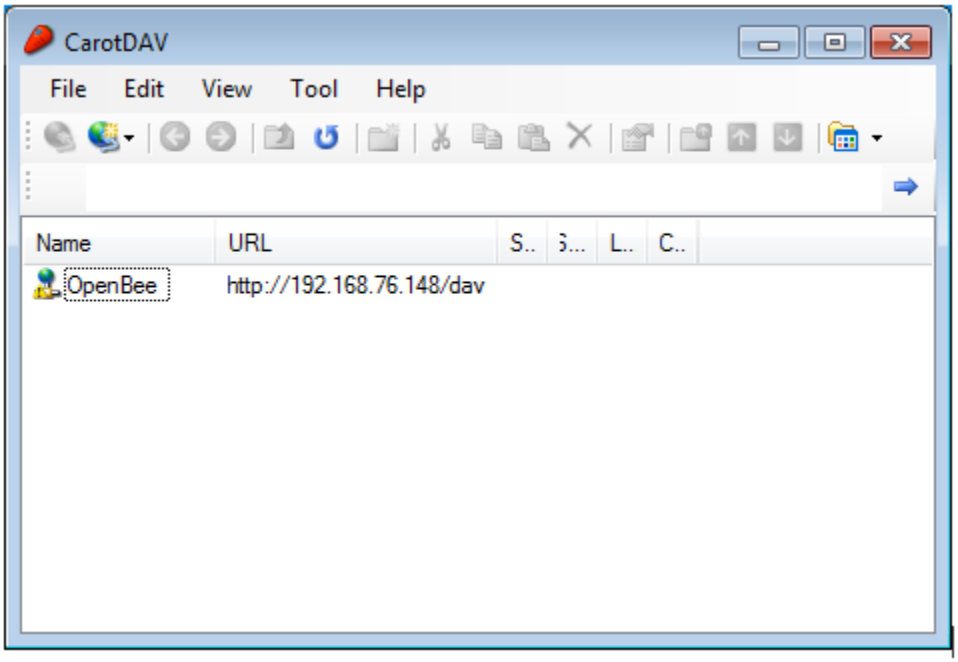
Downloading: http://rei.to/carotdav_en.html#download

Start the application and create a new WebDav connection

In the configuration fields, enter the parameters of your KOMI Doc



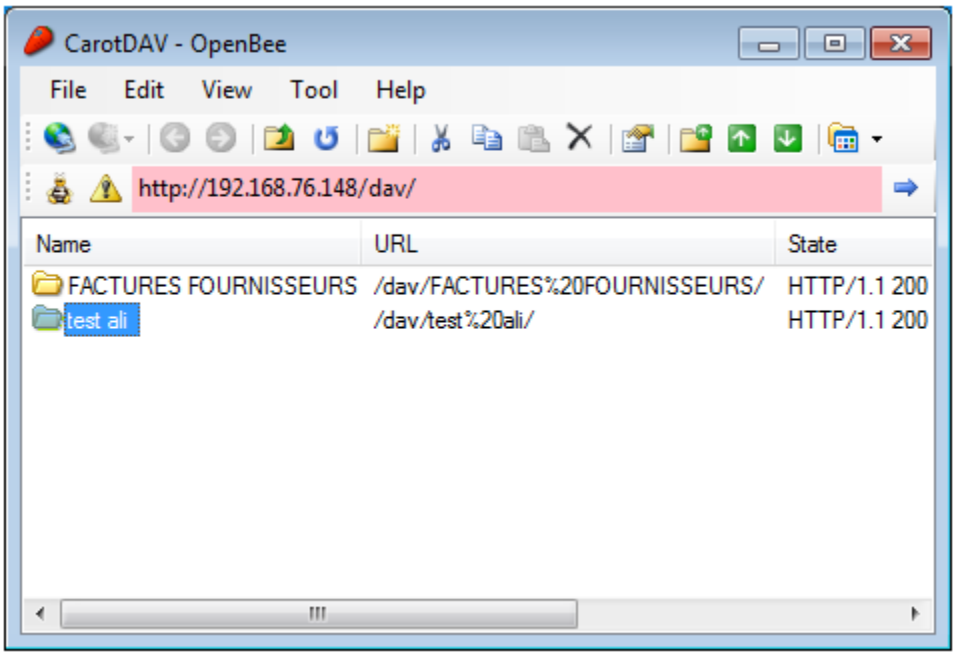
Thereby the connection is created



Double-clicking allows you to list your KOMI Doc directories.

Browse in the tree structure, until reaching the required folder.

Slide in the destination directory (or just on the desktop)



A

Microsoft Office documents edition

This feature allows you to edit an Office document located in KOMI Doc from your workstation.

Prerequisites

One of the following versions of Microsoft Office must be installed on your workstation.

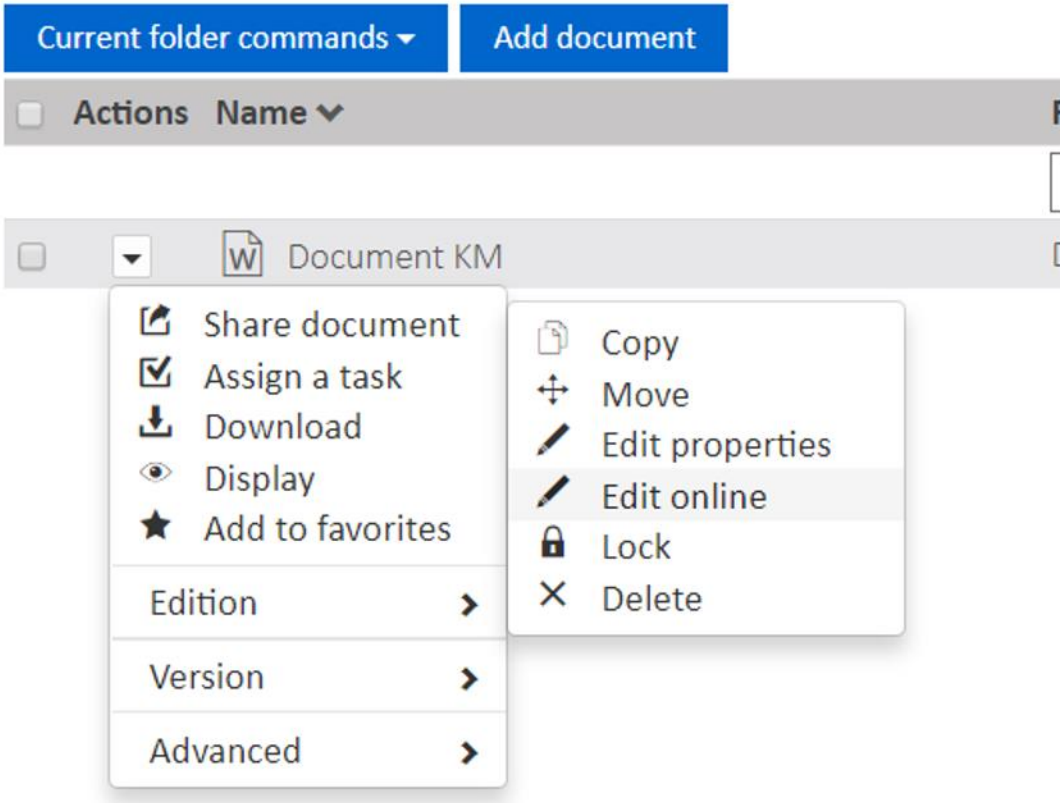
- Microsoft Office Entreprise 2007

- Microsoft Office Standard 2010
- Microsoft Office Professional 2010
- Microsoft Office Professional Plus 2010

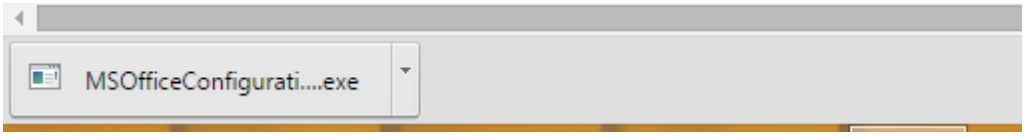
- Microsoft Office Professional 2013
- Microsoft Office Standard 2013
- Microsoft Office Home and Business 2013
- Microsoft Office Home and Student 2013

First use: configuration of your workstation

From the menu on the document click "Edit online":

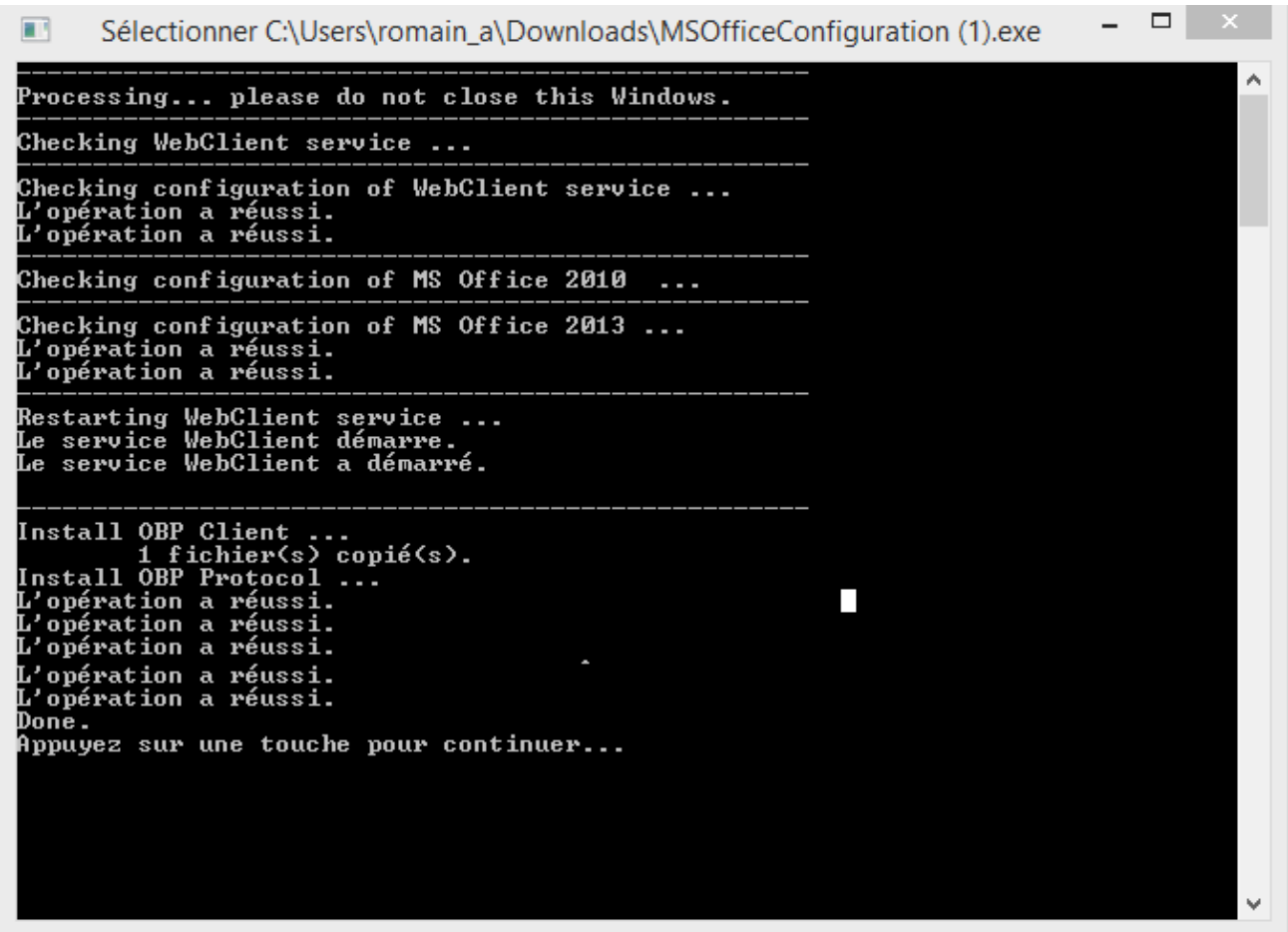


Your browser downloads the utility allowing to configure your workstation.



Execute the utility.

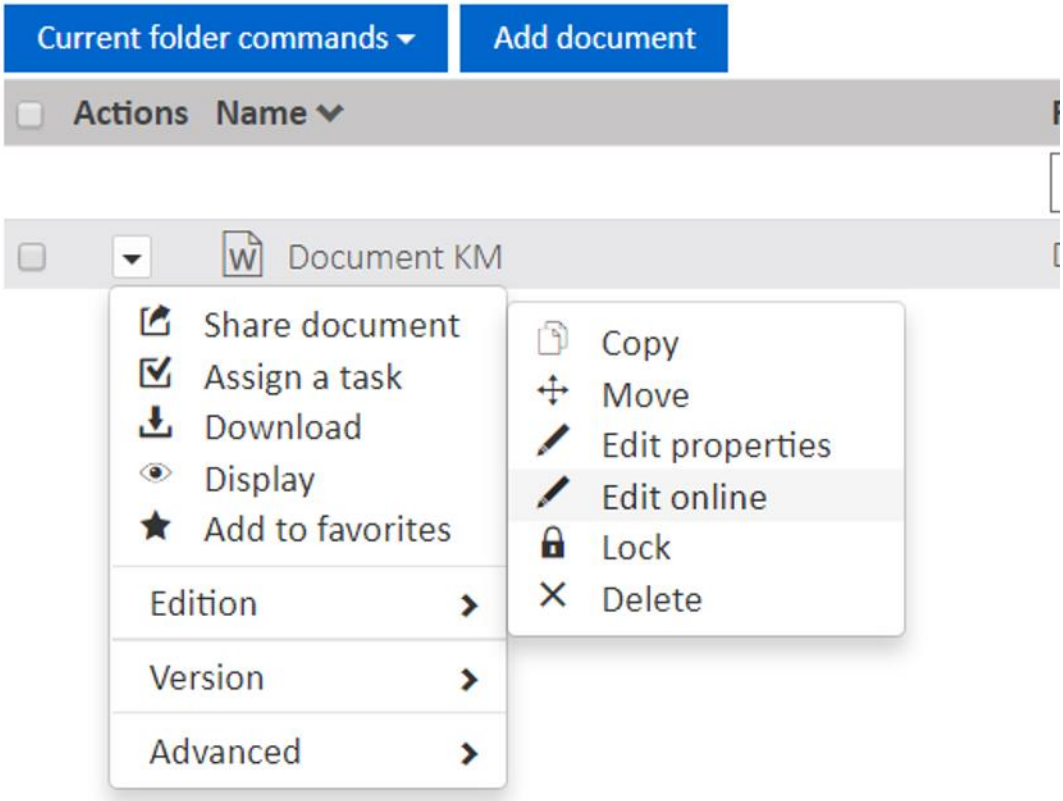
"**Administrator**" Windows rights are necessary to apply the configuration.



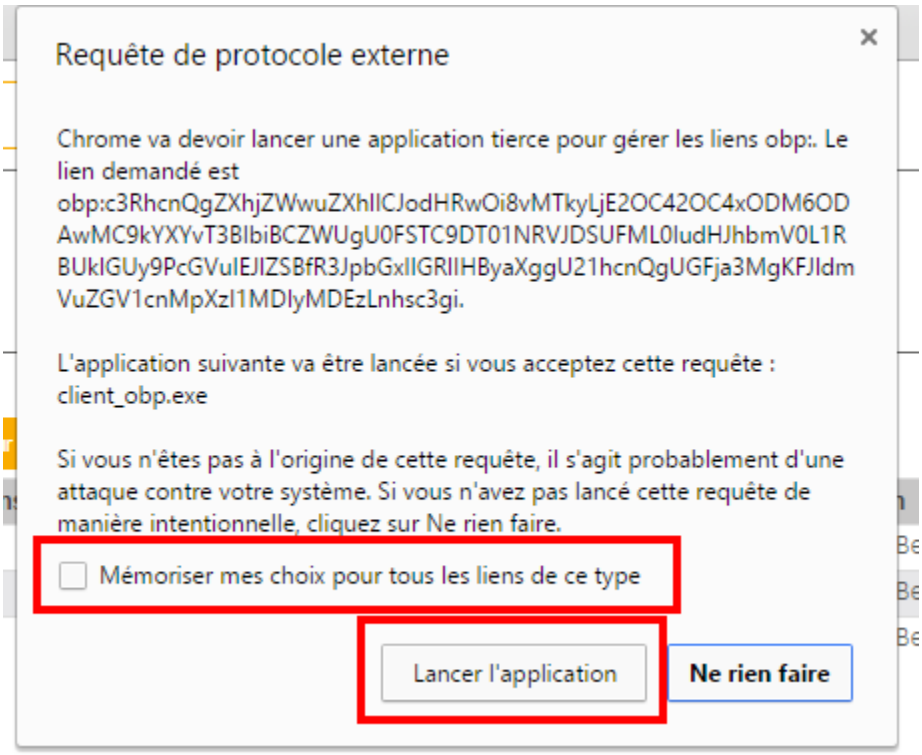
Verify that no error appears. Your workstation is now configured.

Following uses: document edition with Microsoft Office

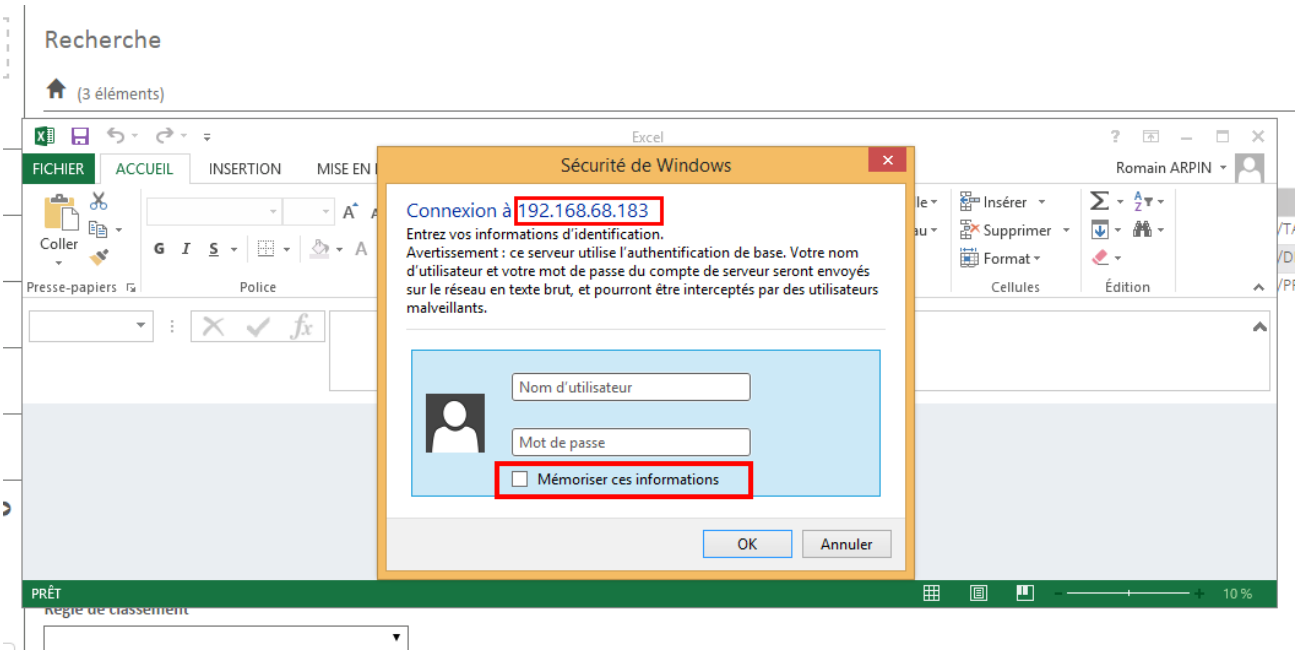
From the menu on the document click "Edit online":



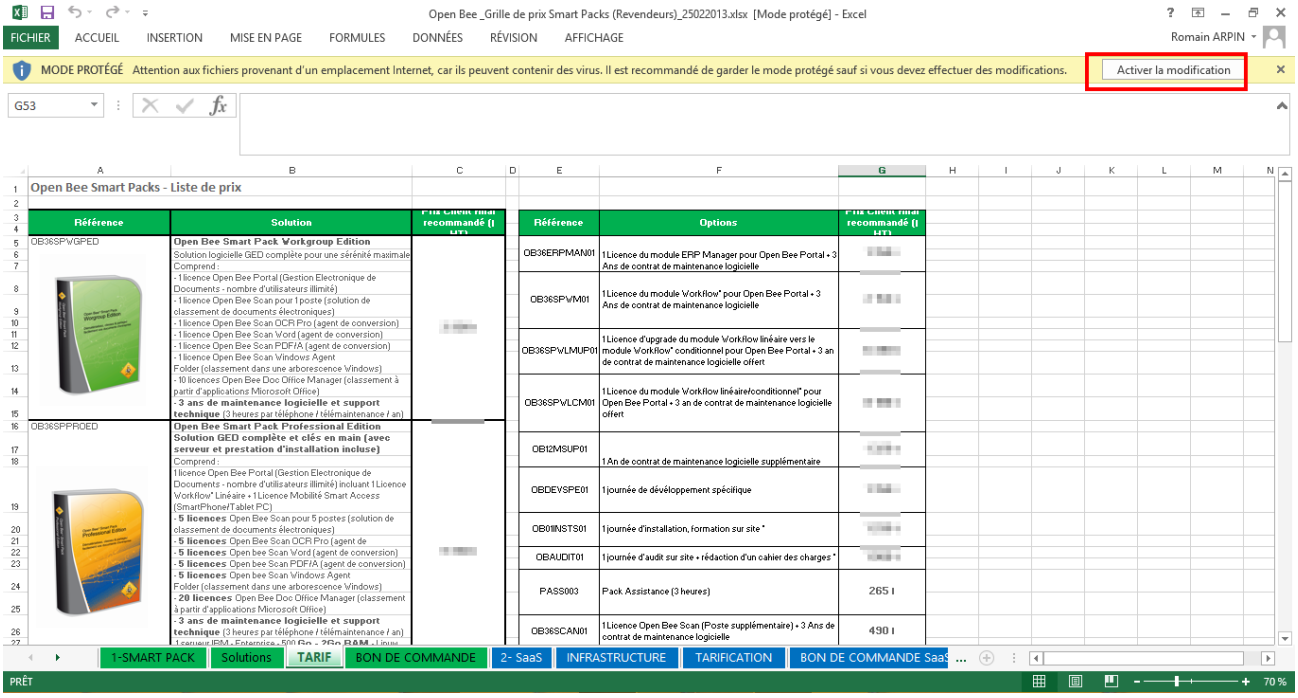
Your Internet browser displays a warning. Allow to launch the application and check the box to memorize your choice.



Microsoft Office launches and asks you to authenticate. Here, enter your KOMI Doc credentials.



The document opens. By Default Microsoft Office does not allow document edition stored on an Internet space such as KOMI Doc, therefore you have to activate modification manually:



*

You can then edit your document. When you click "Save" in Microsoft Office your changes will automatically be transferred to KOMI Doc where a new document version will be created. This operation monitoring is shown in the status bar of Microsoft Office.

Documents search

This feature provides the ability to perform searches on documents and folders.

Starting from any page, you have access to a search engine offering two modes of search on documents, simple search and advanced search.

Simple search

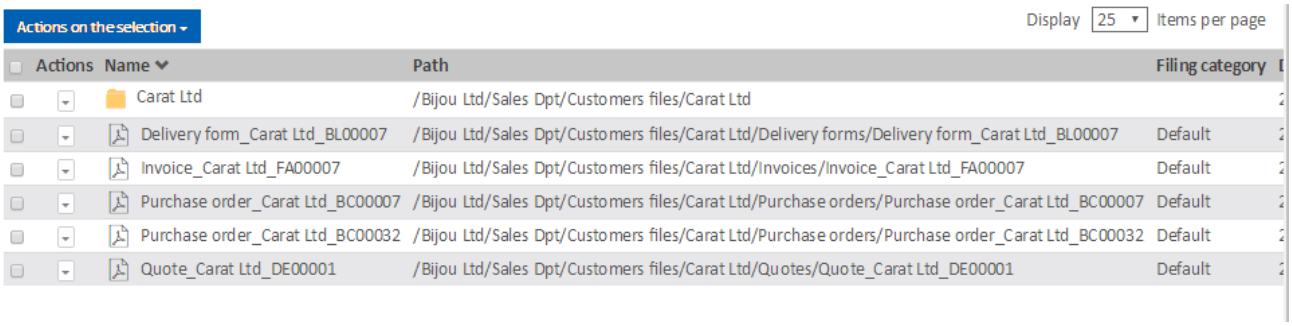
Search by typing words

To search for a document, enter one or more words / character strings in the frame and press "Enter" or on to launch the search.

In this context, you can search for one or more documents based on words in:

- the title
- the content or document body
- document metadata

Once the search done, a page opens, displaying all the documents that match your query.



Behavior and search operators

By default the search exactly looks for the word you typed.

- **Operator +**: Default Operator. Whether or not indicated it is always added.
- **Operator -**: Search for documents that do not contain the word xyz. by typing -xyz.
- **Operator ***: Search for word variations by adding an asterisk at the end of the word.

- **Operator "**:
  - single use: If multiple words are entered, the search returns documents containing all the words (not necessarily continuously). To search with continuous words, you can put your phrase in between quotation marks, such as ***"French Industry"***
  - multiple use: enclose each search term with **"** characters allows using the " OR " operator instead of "AND" between the terms. " french" "industry" will therefore return all documents containing" " french" or "industry".

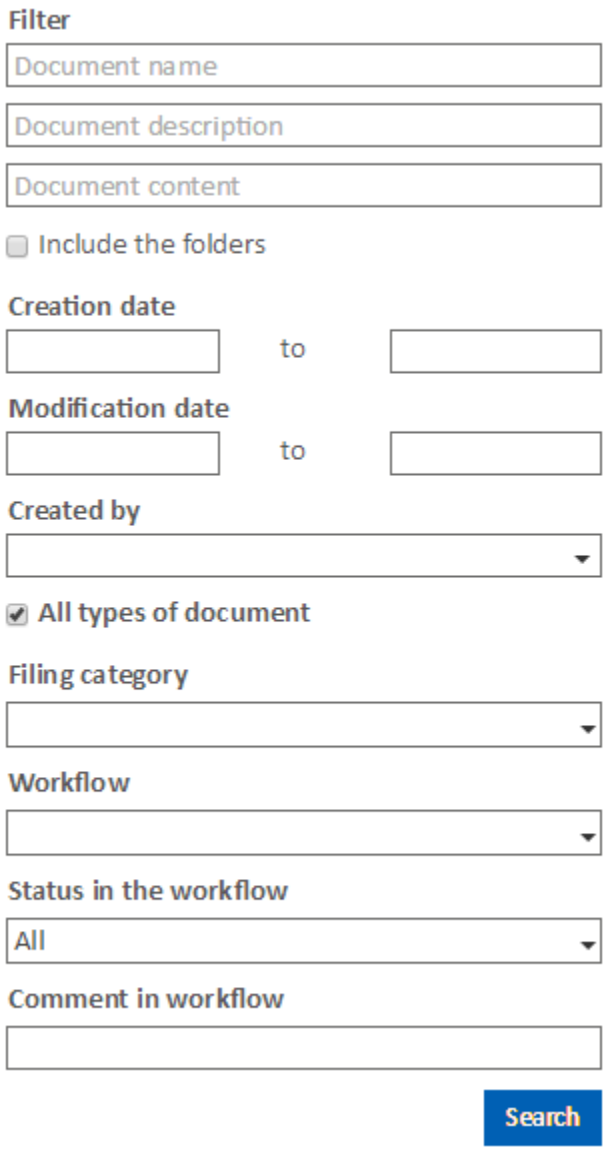
Summary table of possibilities:

Terms	Actions
Industry	All documents containing exactly the word ***Industry***
Industry*	All documents containing a word starting by ***Indus,*** such as ***Industrial***
French Industry	All documents containing the word ***French*** and the word ***Industry***
+French Industry	
"French Industry"	All documents containing the exact sequence ***French Industry***
"French" *"Industry"*	All documents containing the word ***"French"*** or ***"Industry"***
French -Industry	All documents containing the word ***Industry*** and not containing the word ***French***
+French -Industry	
"French" *"Industry"*	

These rules also apply to the "Content" field of la recherche avancée

Advanced search

Introduction



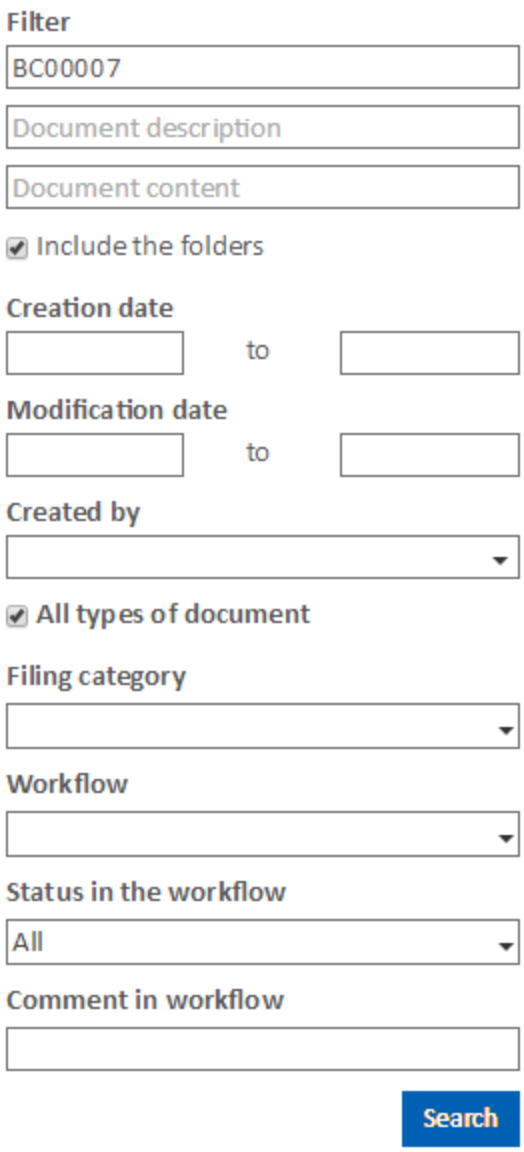
The advanced search allows you to search one or more documents by entering one or more search criteria (document name, creation date, document type, ...).

If you run a search using multiple criteria, the search results will only show you the documents that match all search criteria.

Search by document name

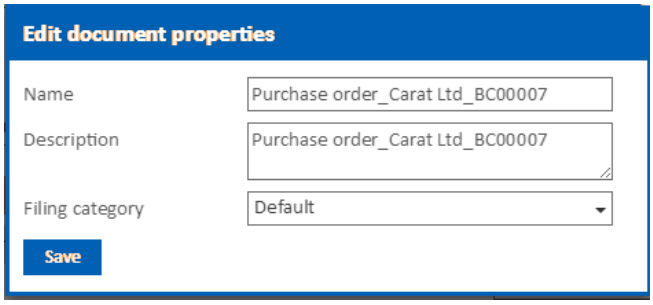
The search engine works with one or more character strings.

It means that in order to find a document, you can enter one or more words (or characters strings contained in the name).



For example with « BC00007 » we find the following document:

There is one document that contains the characters string « BC00007 » in its name

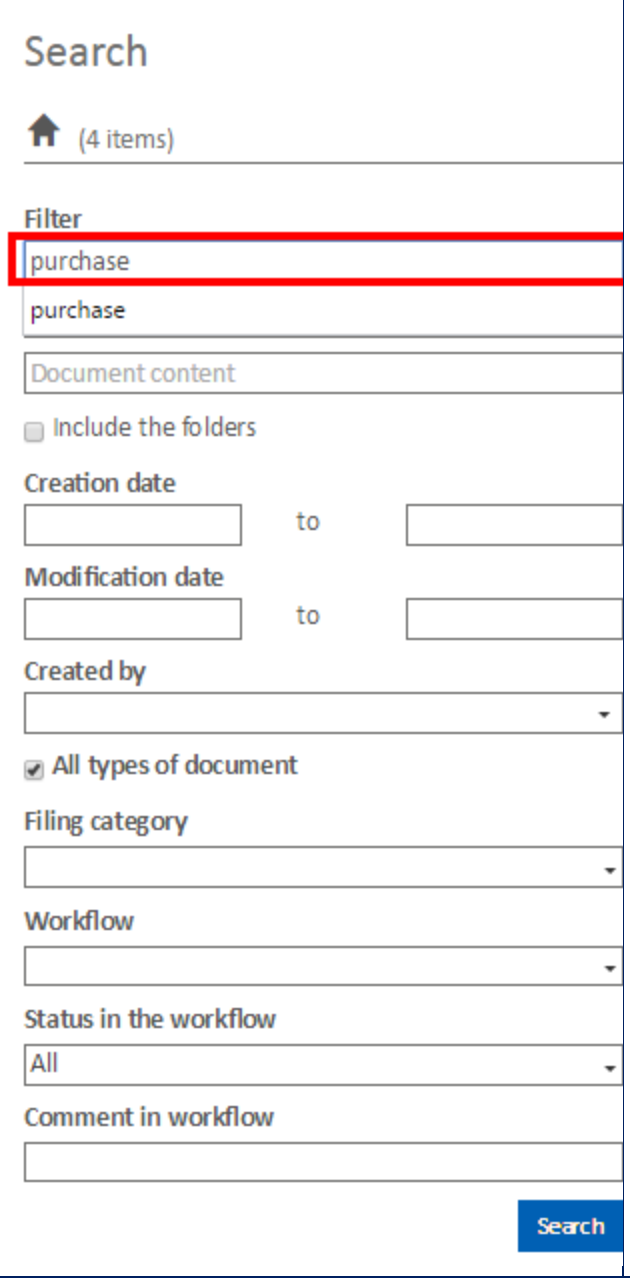


To find the document on the left, you can enter
the following strings in the "Name" field:

- Purchase order
- BC00007

	• BC00007 CARAT

With «purchase » we find the following documents:

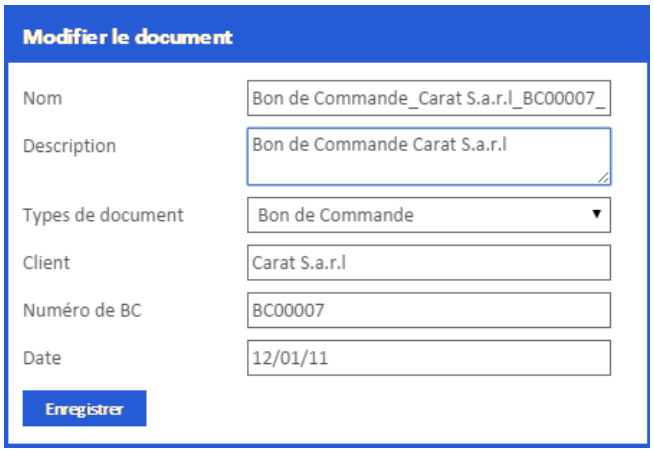


Actions	Name	Path
	Purchase order_Carat Ltd_BC00007	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00007
	Purchase order_Carat Ltd_BC00032	/Customers files/Bijou Ltd/Purchase orders/Purchase order_Carat Ltd_BC00032
	Purchase order_Diamond Ltd_BC00028	/Bijou Ltd/Sales Dpt/Customers files/Diamond Ltd/Purchase orders/Purchase order_Diamond Ltd_BC00028
	Purchase order_Platine & son_BC00010	/Bijou Ltd/Sales Dpt/Customers files/Platine & son/Purchase orders/Purchase order_Platine & son_BC00010

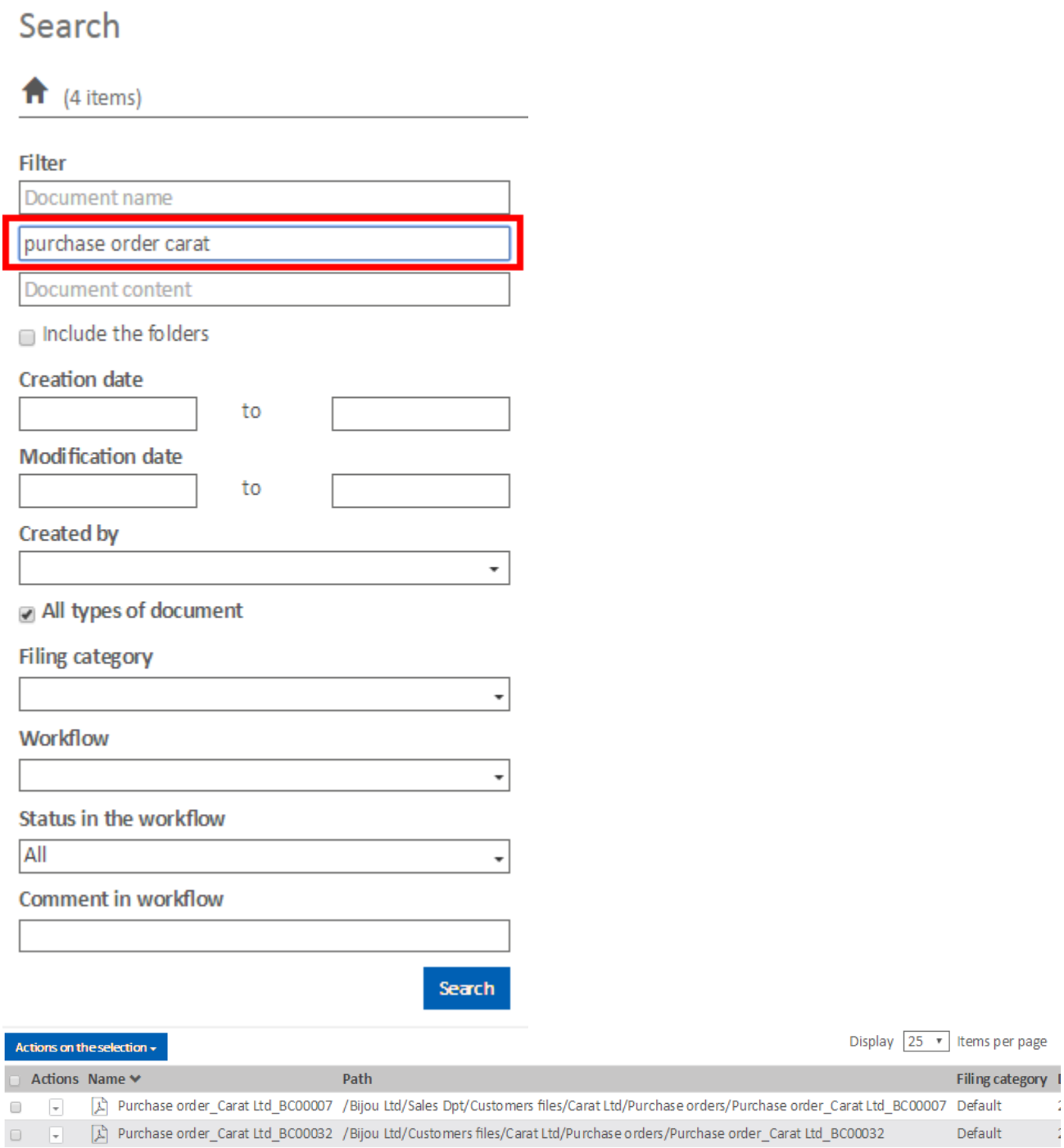
There are 4 documents whose names contain the character string « purchase ».

Search by the document description

The search engine works with one or more characters strings.

	To find the document on the left, you can enter the following strings in the "Description" field: • Order • Order Carat • Purchase order

For example with « Purchase order carat » we find the following documents:

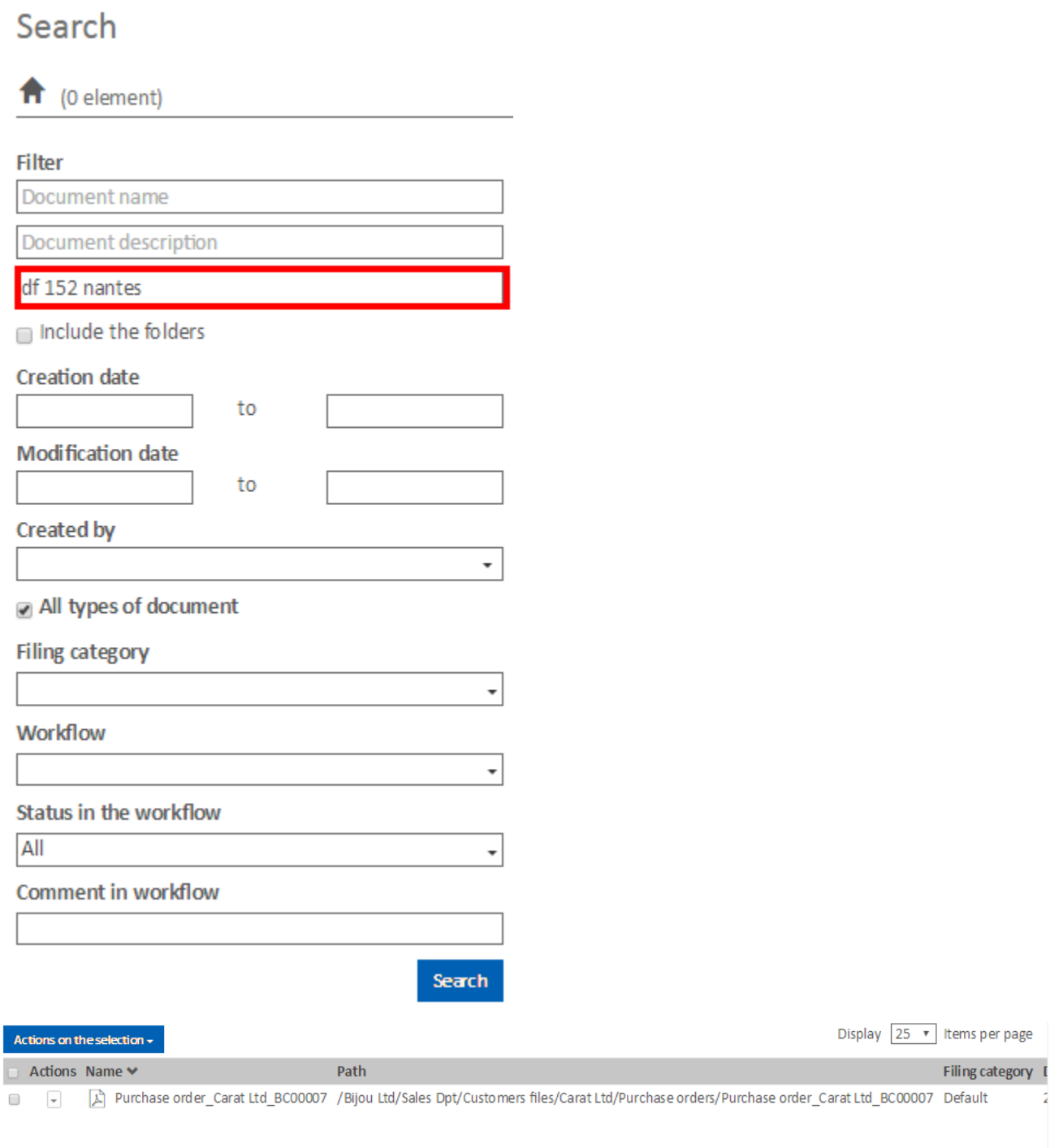


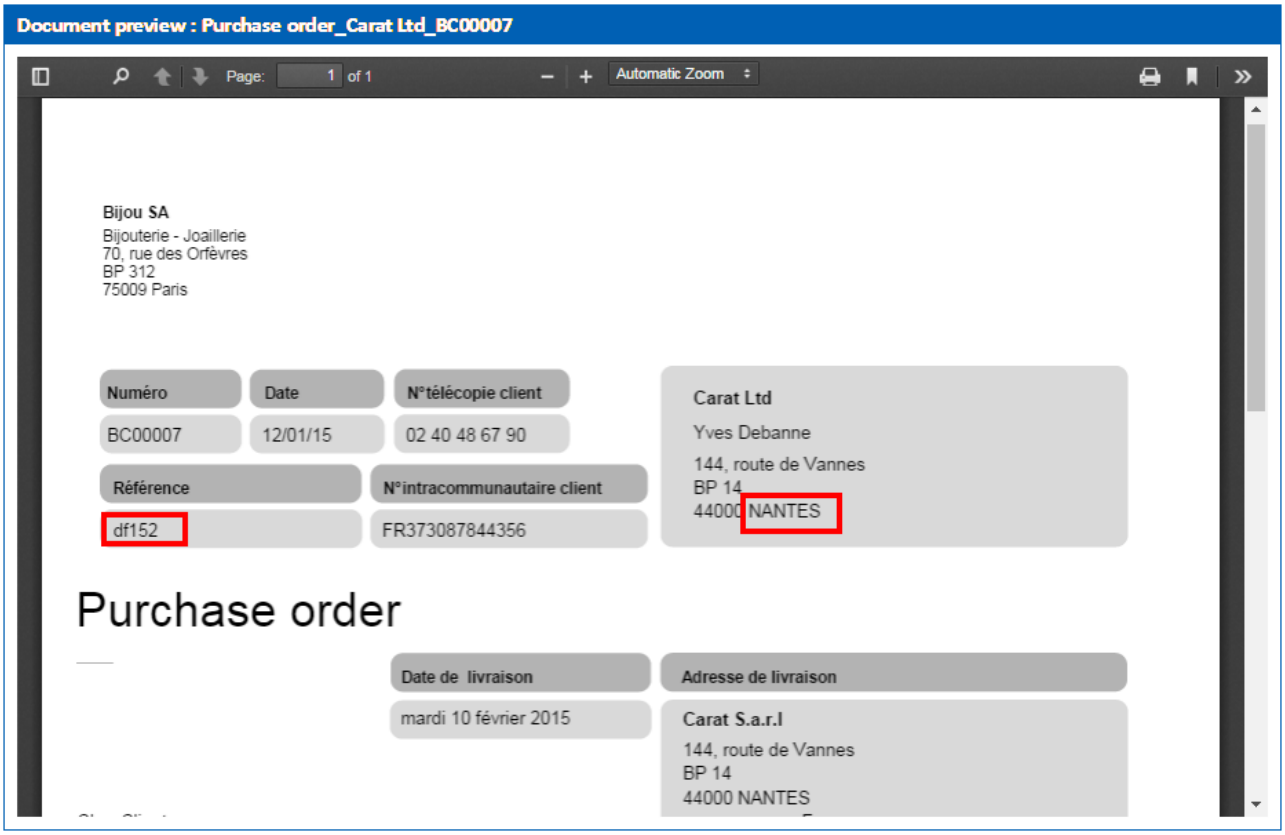
Search by document content

The search by document content allows, like the simple search, to search several words or characters strings in filed documents content.

Example : Search for a document that contains the word "Nantes" and the reference "df152".

In this case you must enter both information in this field (see the image below).

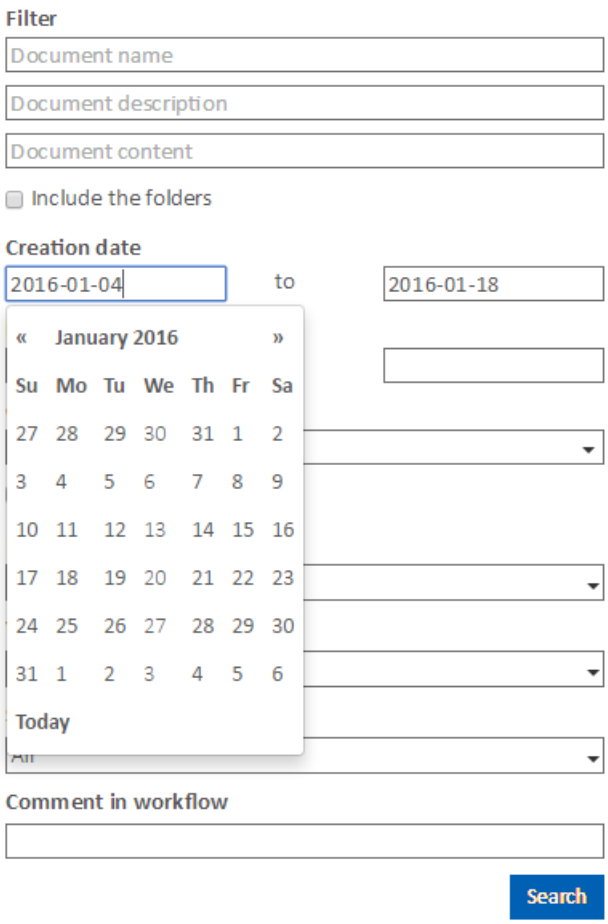

Search
(0 element)
Filter
Document name
Document description
df 152 nantes
Include the folders
Creation date
to
Modification date
to
Created by
All types of document
Filing category
Workflow
Status in the workflow
All
Comment in workflow
Search
Actions on the selection
Display 25 Items per page
Actions Name Path Filing category
Purchase order_Carat Ltd_BC00007 /Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00007 Default



Search by creation date

The search by "Creation date" allows to find documents using their creation date.

You can select a creation period from the calendar.



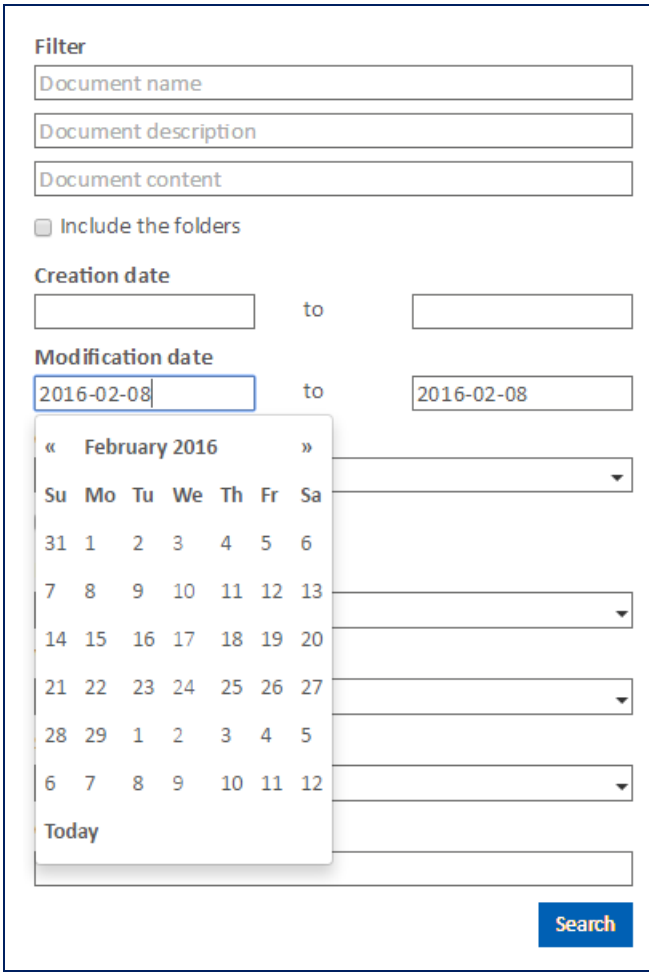
Example : from 4th to 18th of January 2016 (see image on left)

the application will display all documents created
between January 4th, 2016 at 0:00 and January 18th, 2016 at 23:59.

Search by modification date

The search by "Modification date" allows to find documents using their modification date.

You can select the modification period using calendars.



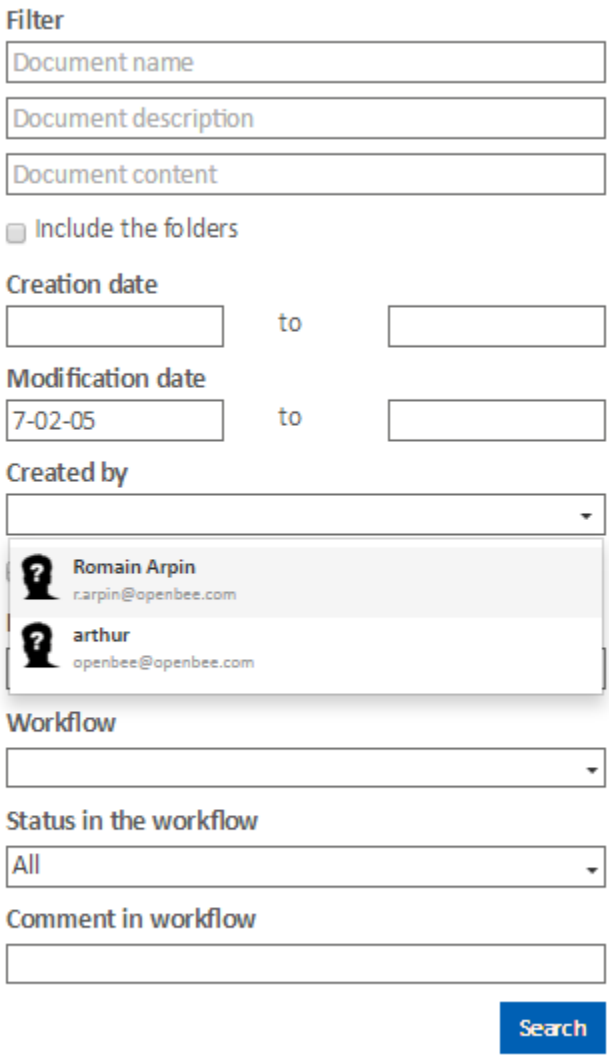
Example :choice of 8th February 2016 to 8th February, 2016

(See image on left) the application will display

all modified documents on the 8th February, 2016.

Search by creator

This search will find one or more documents created by one person.



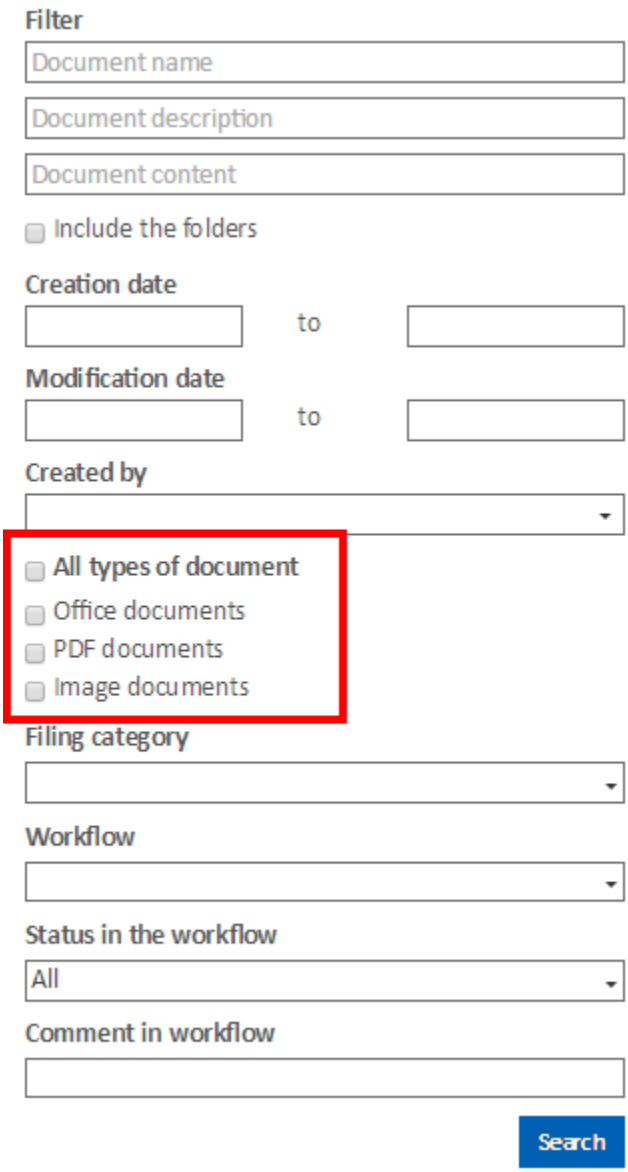
Search by type

The search can be limited to one or more types of documents.

You can choose between these different types:

- Office documents
- PDF Documents
- Image documents

Selecting "All types of document" show all documents without restriction.



Search by filing category

Search by filing category allows you to perform a search on the documents' metadata value (previously filled in with KOMI Scan or KOMI Doc Office Manager or other)

Filtrer

Nom du document

Description du document

Contenu du document

☐ Inclure les dossiers

Date de création

à

Date de modification

à

Créateur

☑ **Tout les types de documents**

Règle de classement

Bon de Commande

Client

Carat S.a.r.l

- Carat S.a.r.l
- Ciselure
- Cleen Bijoux
- Cristaux liquides
- Deutschland's Bijoux
- Diamant Vert
- Directy Sarl
- Grenat pour toi
- Horlogerie Ceram
- La Topaze Lyonnaise
- Opale
- Perles parisiennes
- Platine & fils

It is also possible to do a search on a value range.

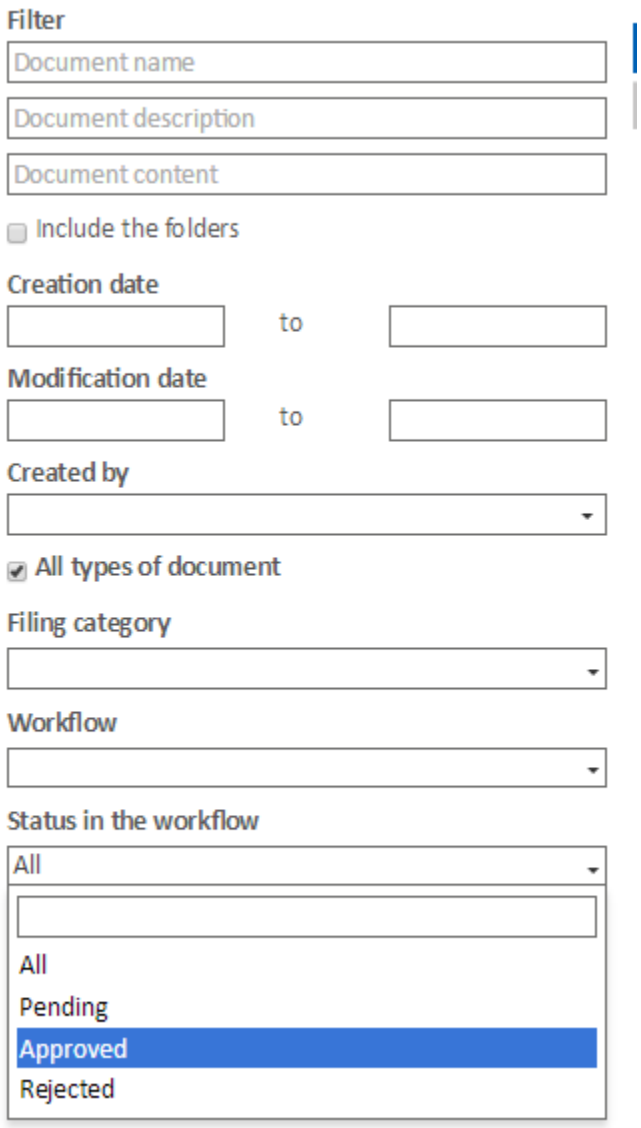
Example :All amounts from 1000 to 2000. This type of search is very useful on numeric metadata, but may be unreliable on metadata containing character strings.

Depending on the needs you can search with one or more document type fields.

If you search by multiple criteria the search results will only display the documents that match all entered search criteria.

Search by workflow status

This search option brings out documents that have been processed through a workflow before being filed.



It is therefore possible to search "Rejected", "Approved" or "Pending" documents in a workflow.

Search by workflow

This field allows you to search only the documents that have been processed by a workflow before being filed.

Actions and browsing in search results

Actions

The available actions on documents and folders when browsing, are also available on a search results.

It is possible to sort the folders and documents by their names, by clicking on the arrows in the list header

Grouped permissions and actions

The search results can display documents from multiple folders and therefore having different permissions.

During a bulk action on documents with different permissions, only documents for which the user has the necessary permissions will be processed.

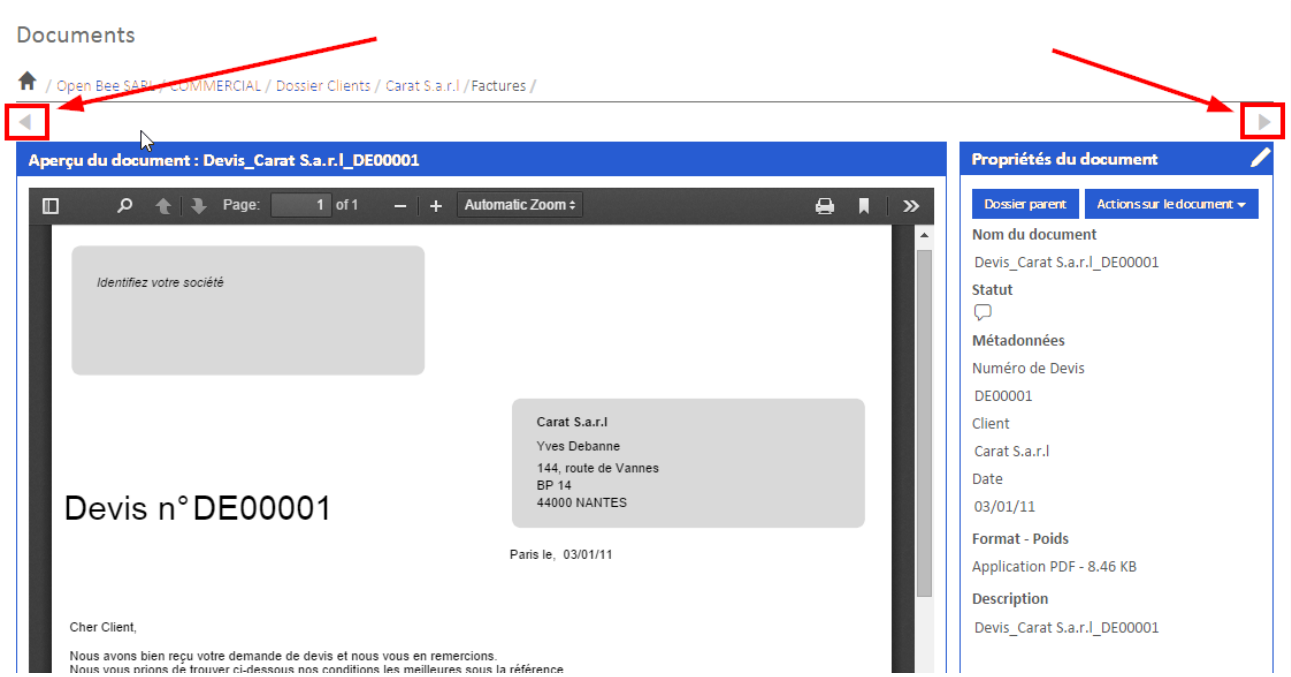
Example :

The user "John", did a search on "invoice". The documents "Invoice A" and "Invoice B" are returned.

John only has the permissions to delete "Invoice A". When trying to remove the two invoices using a grouped action, only "invoice A" will be deleted.

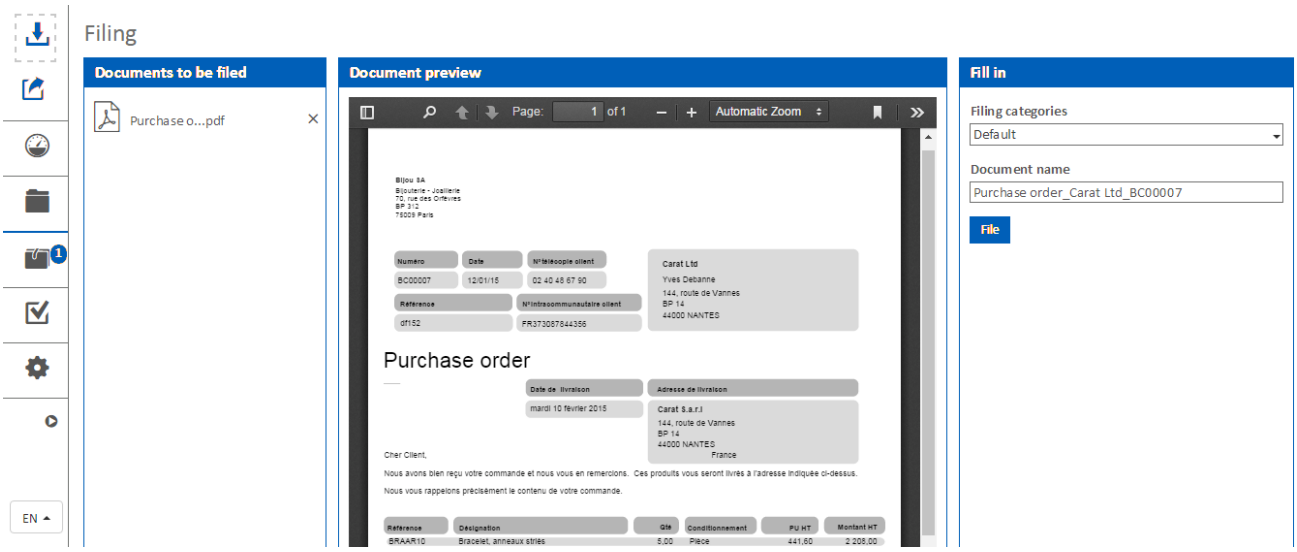
Browsing

When you display a document after a search, it is possible to view the next or previous document from the search without going back to the search results by clicking on the arrows to the right and the left of the screen:



Filing

Thanks to the filing tab, you can preview and dynamically file your uploaded documents in KOMI Doc. Click on **"Filing "** from the menu on the left of the screen, you will find all your pending documents awaiting for filing.
These are located in the **"Documents to be filed"**. In the column **"Document preview"** you will see a preview of the selected document.



Two filing modes are possible:

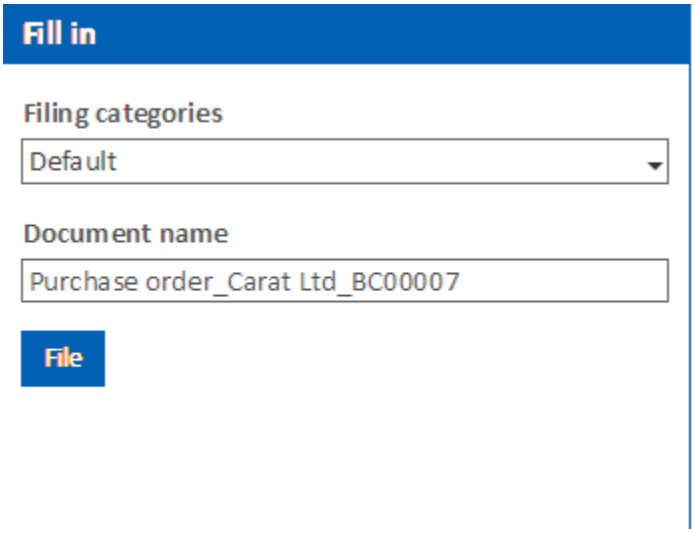
- Filing a document using the default filing category
- Filing a document using a filing category

> These steps imply that a document pending for filing is selected in the "Filing" section

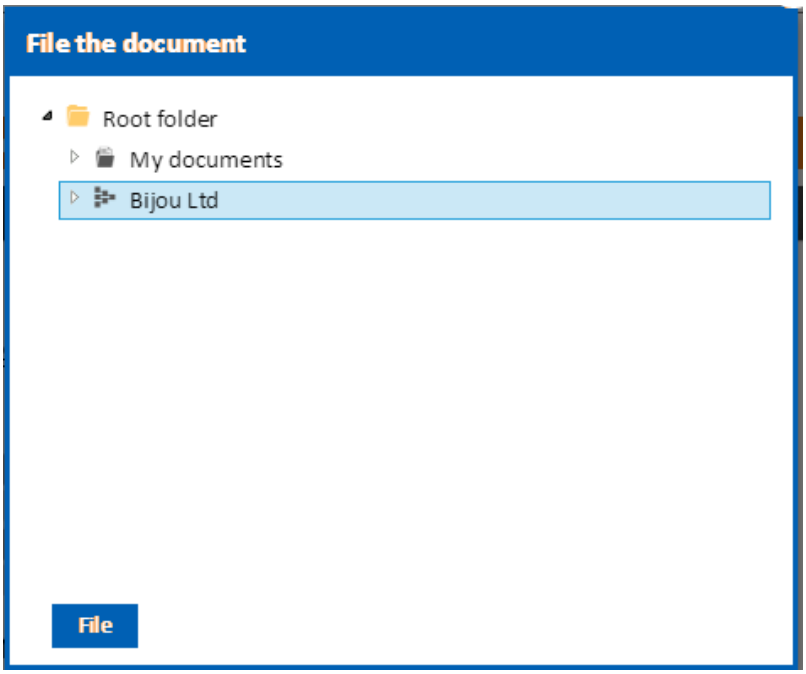
Filing a document using the default filing category

In the right part of the **"Filing document"** screen, select the filing category **"Default"**.

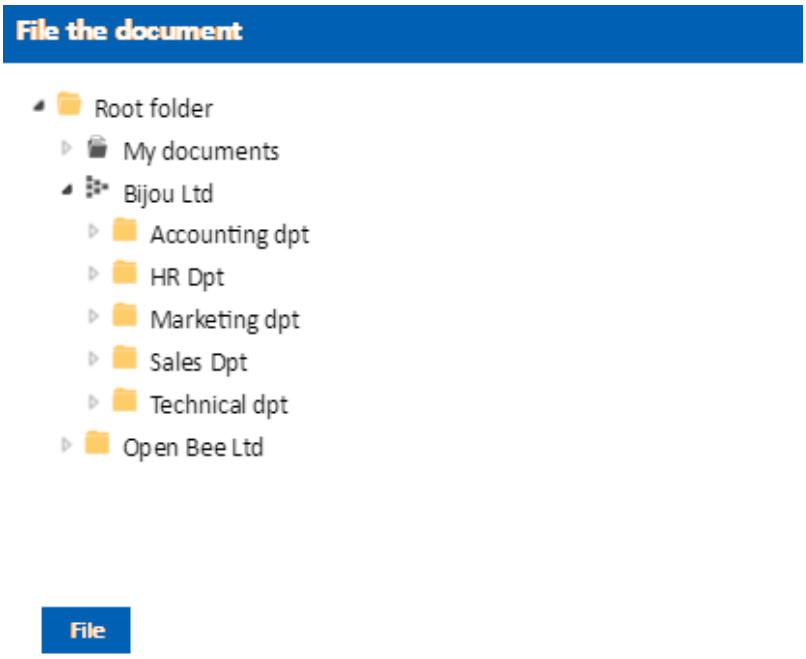
Enter the name of the document and click **"File"**



Select the folder in which you want to file the document.

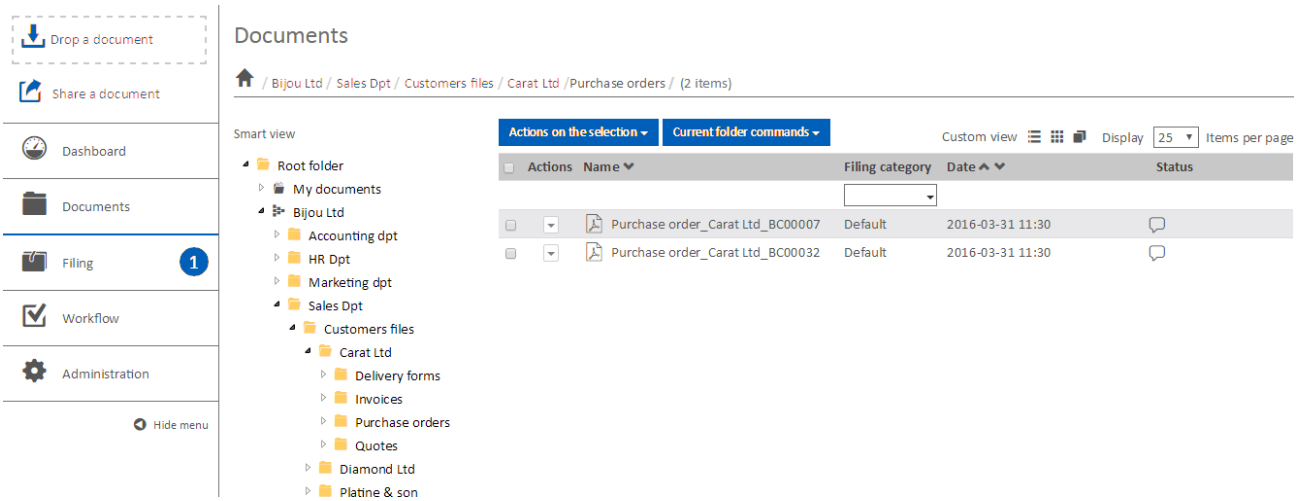


When selecting a folder, its sub-folders appear if you click on the small white arrow in front of it.



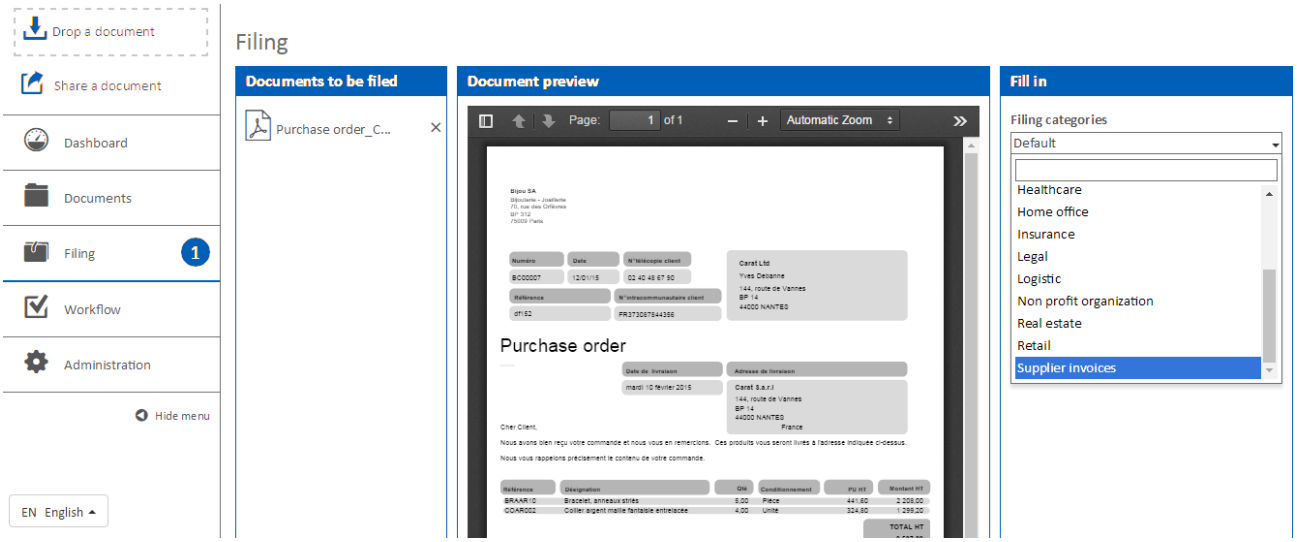
Click on the button "File" at the bottom of the page.

Your document is then filed to the location selected earlier:

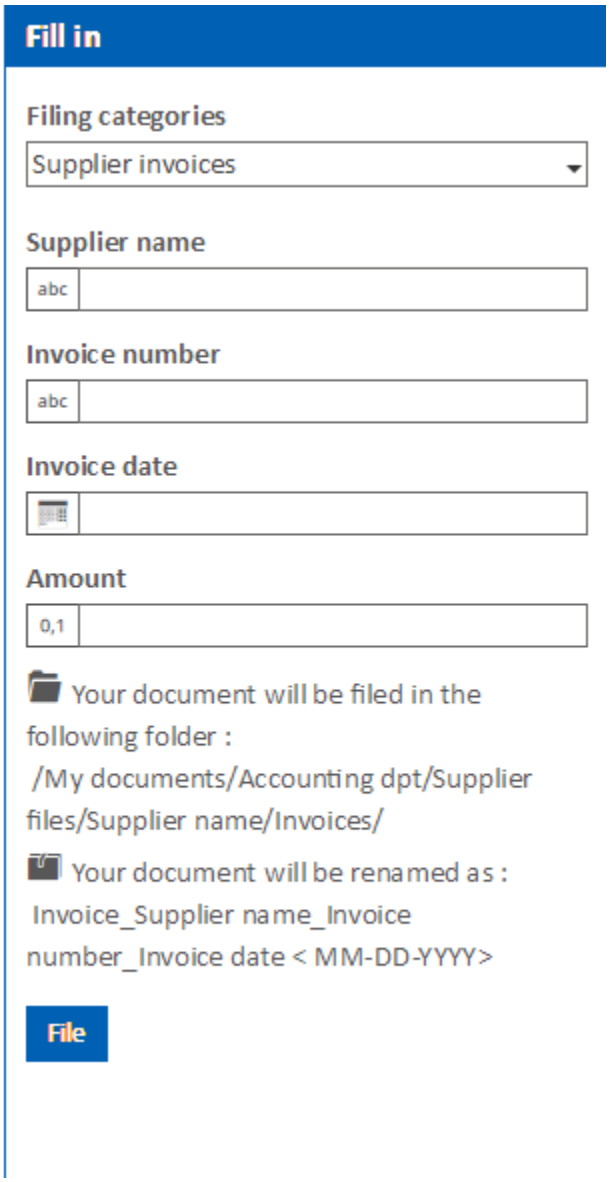


Filing a document using a filing category

Select the filing category of your choice.

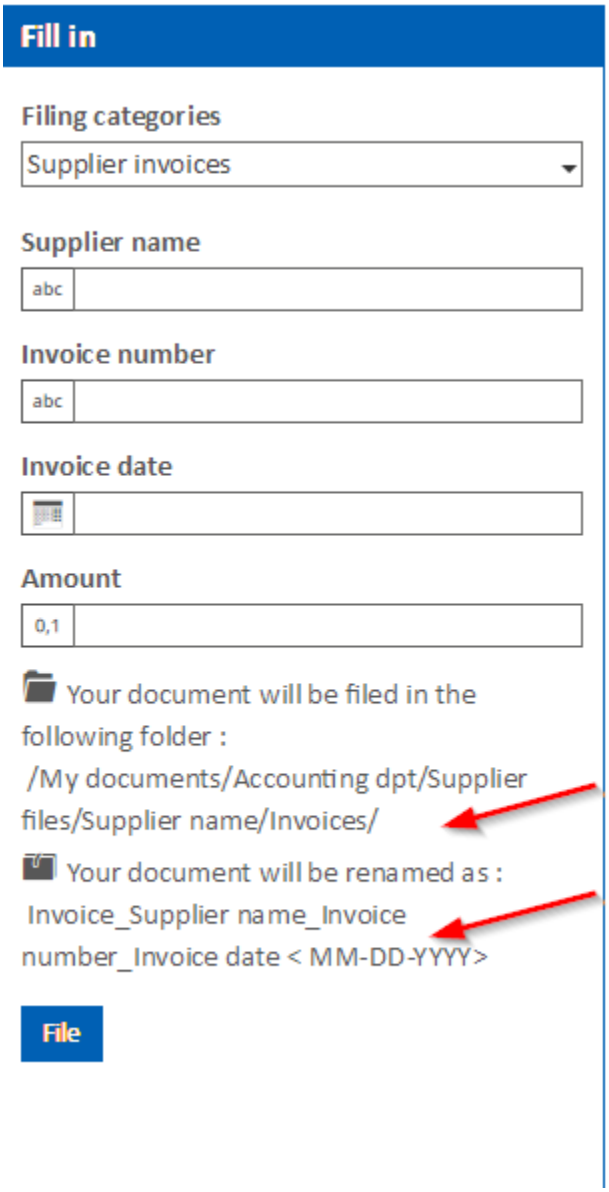


Fill in the document metadata that are dynamically displayed based on the filing category selected.



Then fill in the supplier name, the invoice number and the amount.

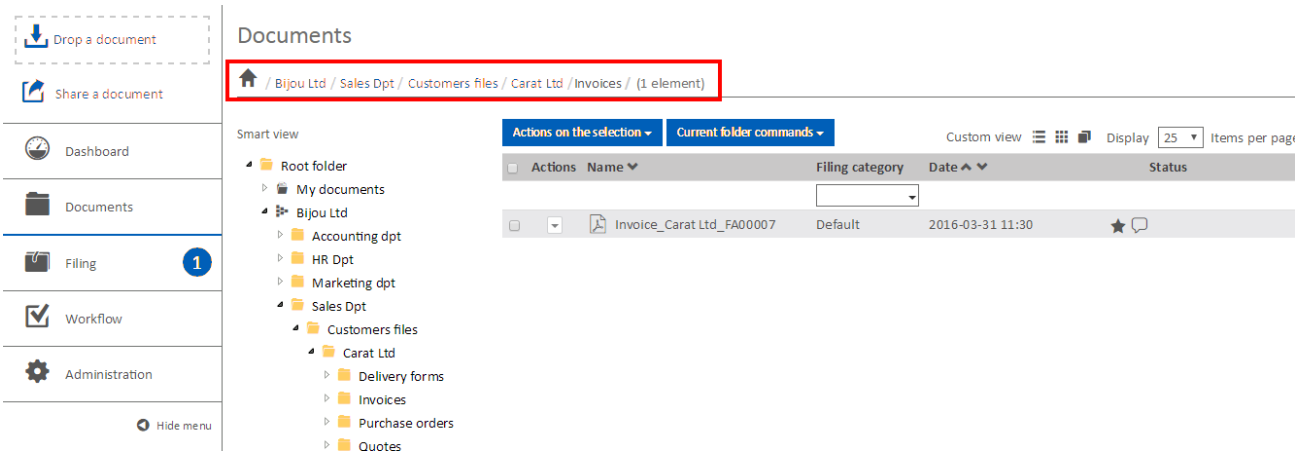
Once all fields are filled in, you will be able to see the path where the document will be stored and the name of the document.



Click on the button **"File"**.

A notification tells you that your document has been properly filed.

Your document is then indexed correctly thanks to the filing categories and renamed automatically:



The document will be filed according to the filing category parameters.
For more information, please refer to "Create a filing category".

A document has to be filed in order to be accessible to other users. Any document awaiting filing will not be visible outside of the filing section.

There are multiple ways to add documents in the filing zone:

- From a PC software (Sync)
- From a WebDav digitization button
- From the Web interface with a drag / drop

From a PC software (Sync)

KOMI Sync is a synchronization tool that allows every collaborator with a KOMI Doc user account to:

- Automatically send scanned paper documents from his scanning solution to the KOMI Doc filing zone.
The synchronization tool monitor a specific folder, to which scanning devices will send scanned paper documents. Each time a new file appears, it will automatically be sent to the "Filing" section in KOMI Doc.

- Synchronize documents from his workstation (on the user's computer) with KOMI Doc.
The synchronization tool updates your KOMI Doc online, based on documents contained on your workstation and vis-versa. It also compares the files on your workstation with those present in KOMI Doc in order to ensure that you benefit from the latest version of the file you want to work on.

- Transfering mass documents
The "drag-and-drop" function in KOMI Sync allows you, in a simple drag and drop, to send one or more documents from your desktop to the KOMI Doc folder tree structure online.

- **Consult the KOMI Sync documentation in order to know more about this tool.**

From a WebDav digitization button

Most scanners or printers are compatible with the WebDav protocol.

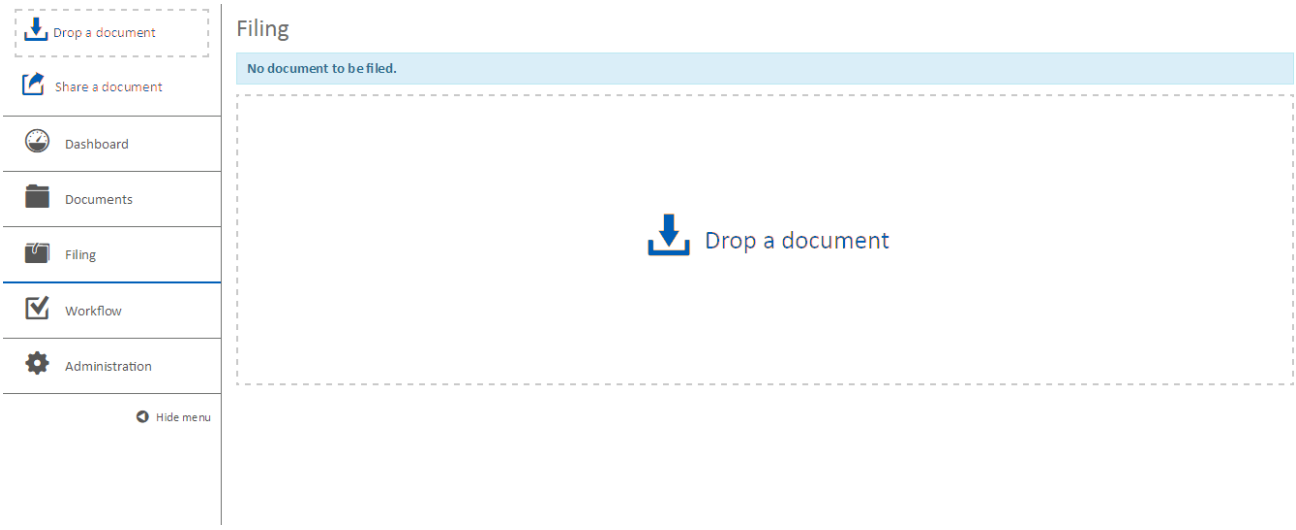
Please consult your multi-function documentation in order to create a WebDav digitization button. This will allow you to send a scanned document directly to KOMI Doc.

Here are the information you need (assuming that your solution can be accessed at the address http://localhost:8000/)

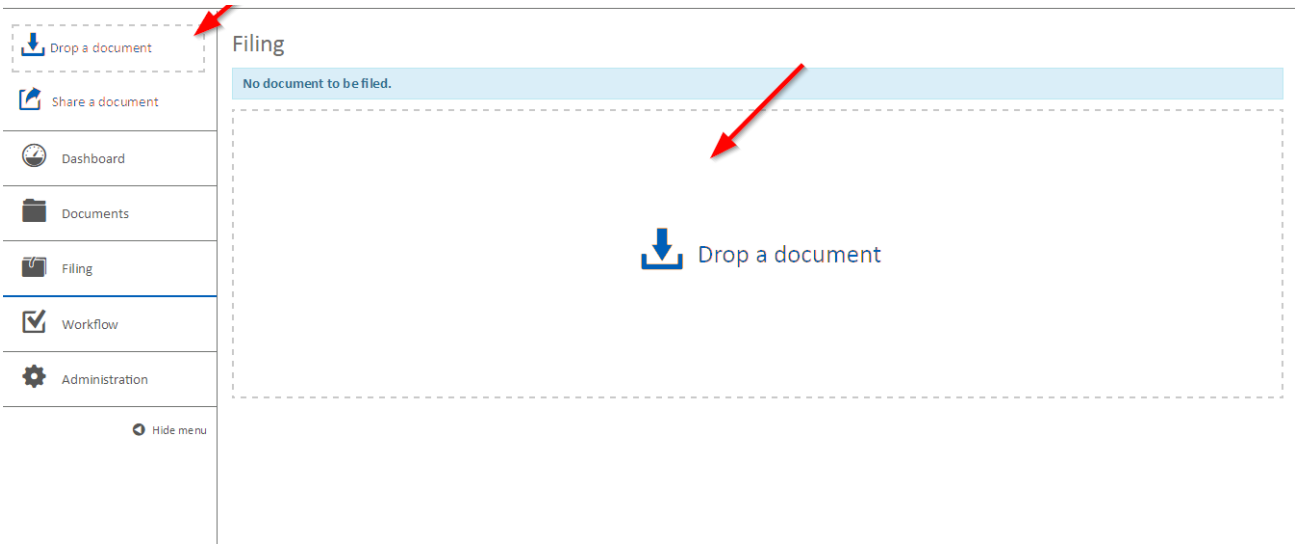
- Webdav server URL : http://localhost:8000/**davq**/
- Login: your KOMI Doc login
- Password: your KOMI Doc password

Once transmitted by your printer to KOMI Doc, your document is waiting in the filing zone and may be filed with the KOMI Doc filing categories.

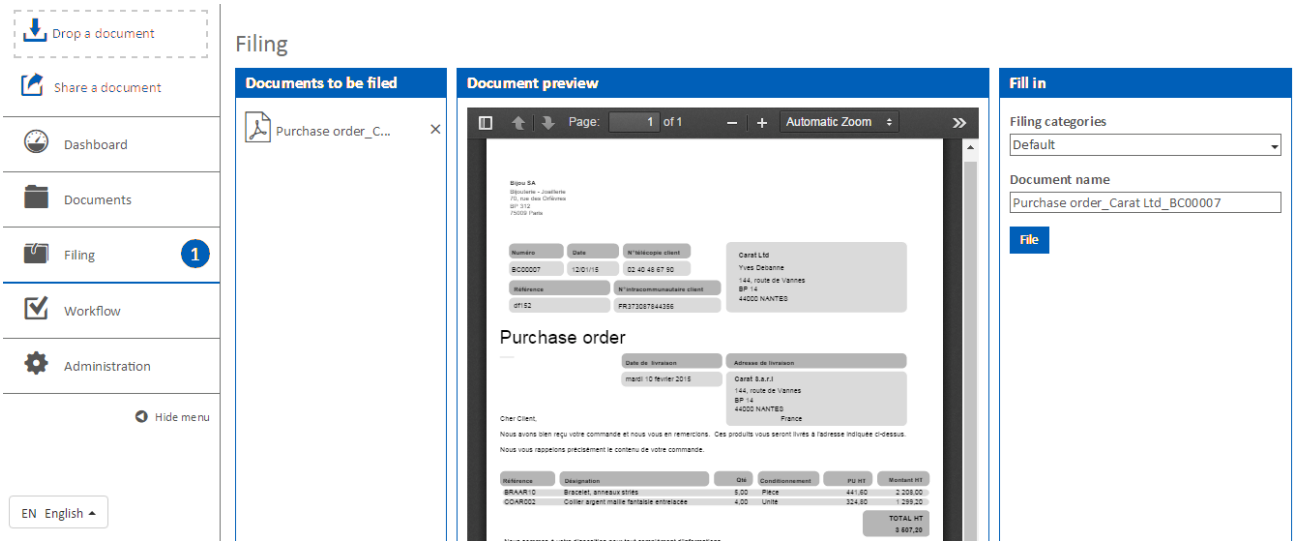
From the Web interface with a drag / drop



From the **"Filing"** tab of the KOMI Doc interface, you can directly file your documents using a drag / drop in the box provided for it.



When you drop your files into this area, they appear in the column **"Documents to be filed"**:
You can see the preview of the selected document in the dedicated area for this purpose.

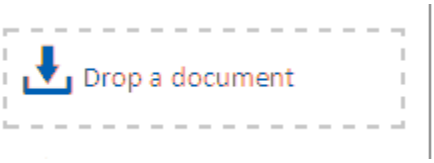


Select the filing category that you want to use from the **"Fill in"** column

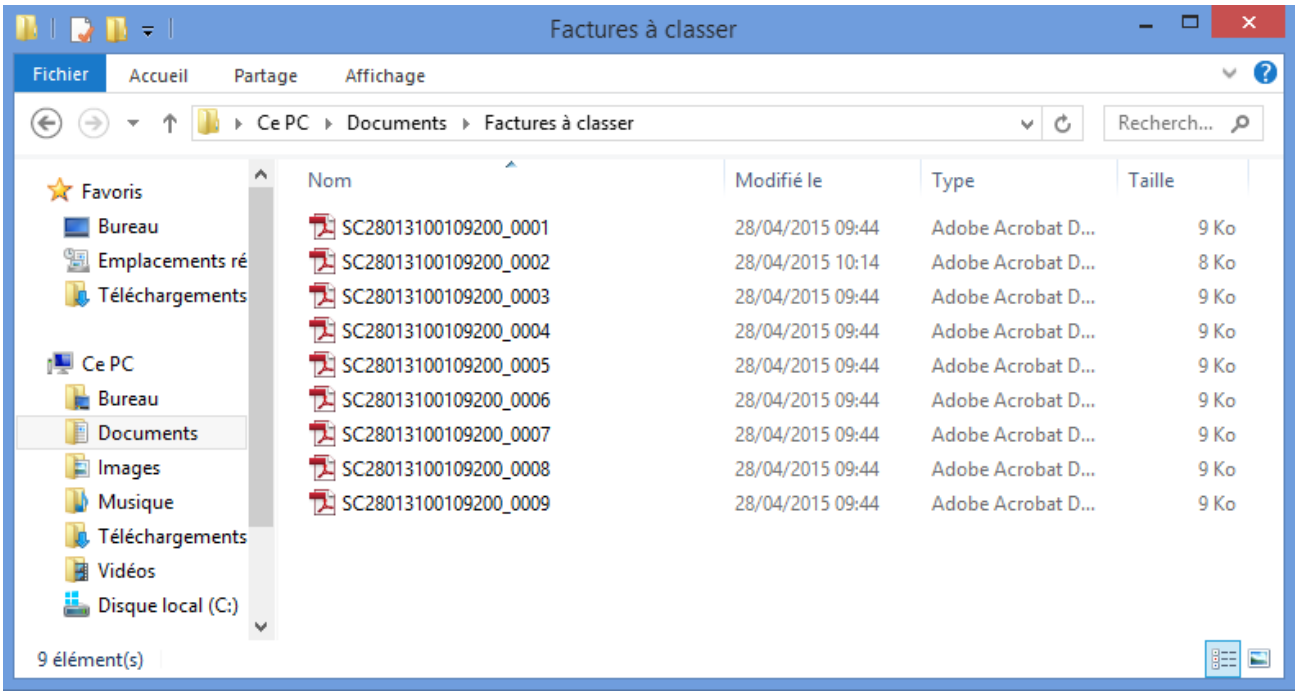
You have two options, file it by "Default" or use an advanced filing category.

Alternative :

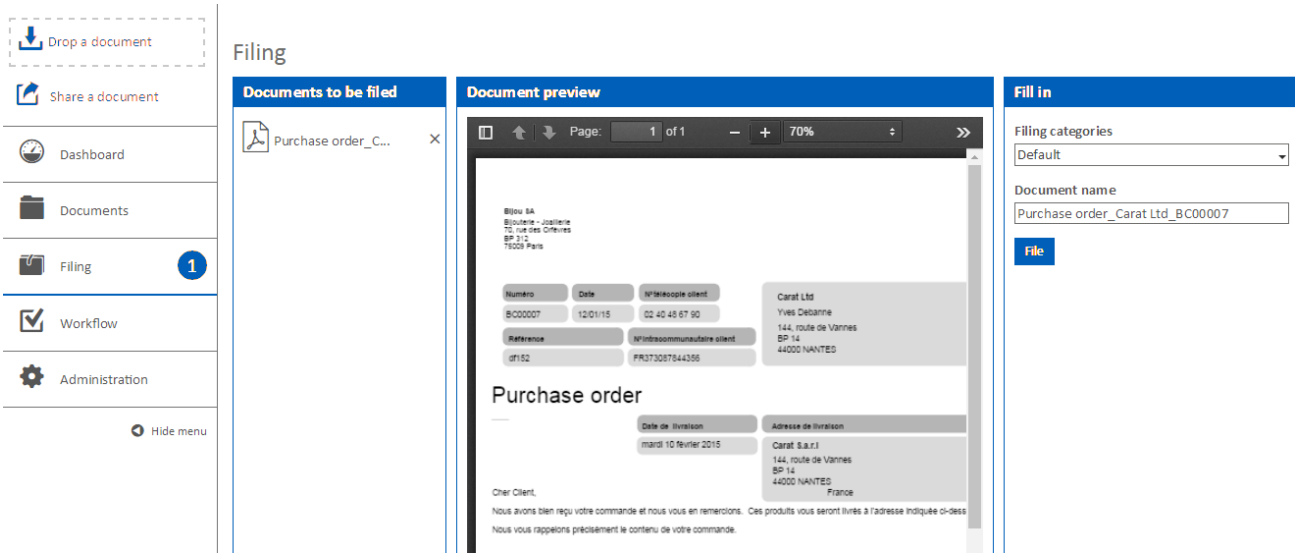
You can also directly click on the download area



A Windows Explorer window opens:



Select the file(s) and click **"Open"**. The document(s) will appear in the **"Documents to be filed"** column of your DMS interface.



Your documents are therefore ready to be filed. Go to the **"File a document"** section to learn more about the filing categories.

Workflow

Definition of a workflow

A "**workflow"** consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services, or process information. It can be depicted as a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms.

From a more abstract or higher-level perspective, **"workflow"** may be considered a view or representation of real work. The flow being described may refer to a document, service or product that is being transferred from one step to another.

Workflows may be viewed as one fundamental building block to be combined with other parts of an organization's structure such as information technology, teams, projects and hierarchies.

Source : wikipedia https://en.wikipedia.org/wiki/Workflowhttp://fr.wikipedia.org/wiki/workflow

In this definition, an important point for the development of a workflow is noted: **The workflow describes the approval circuit, the tasks between the different process participants, deadlines, validation modes, and provides to each of the participants the necessary information to carry out its task.**

A comprehensive study of one or more business processes is therefore essential before creating a workflow.

Fonctional workflow automation (e.g.: the superior validation) is generally outcoming from homogenization, rationalization and optimization of communication desire within the company.

When studying a workflow, we must distinguish and highlight:

- Objects that are part of the business process: paper document, electronic, or other ...
- The different states of objects: created, modified, being validated, validated, ...
- The participants that interact with the workflow: validation, correction ...
- Processing deadlines of a task
- The automated actions

Dans cette section

A lire également

- Supervision du Workflow
- Workflow administration

Using the Workflow

- Notifications of tasks to be processed
- List of tasks to be processed
- Tasks processing
  - Unitary serial processing
  - Batch processing
- Notify users that a task is done
- Actions on the document before a task processing

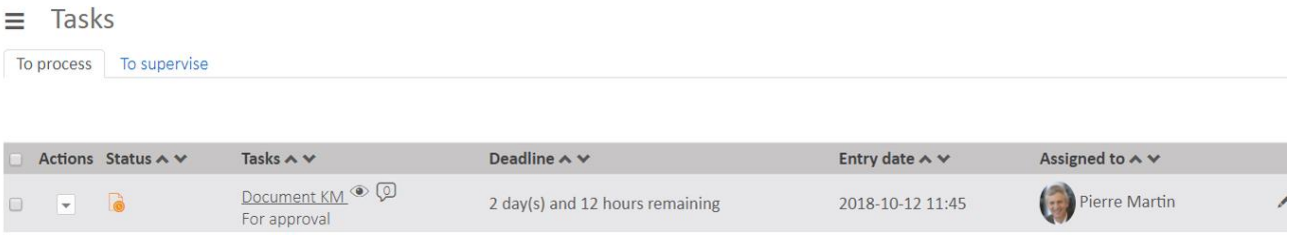
Notifications of tasks to be processed

A user is notified of tasks to be processed in a workflow:

- by email
- from the dashboard
- from the "Workflow" menu

Clicking one of these elements will redirect the user on the "**Workflow \ List of tasks**" screen

List of tasks to be processed



It is possible to sort all the columns. Some columns also allow a filter to view the tasks assigned to a particular user.

Column description:

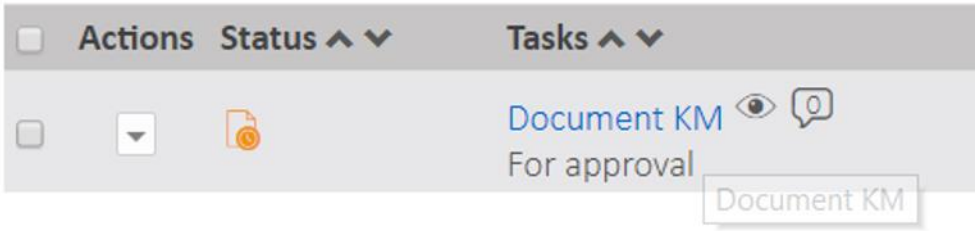
- **Status:** "Pending", "Overdue task(s)", "Approved" or "Rejected". By default, the "Pending" and "Overdue tasks" are displayed
- **Entry date:** date the task was assigned
- **Deadline:** remaining time before the task is overdue
- **Name:** the name of the workflow to which the task belongs
- **Tasks:** the task name. If the connected user is the task participant, he can click on the task to display the detailed view.
- **Participant:** person in charge of the task.
- **Document name:** name of the document having triggered the task. Click on the document name to open a preview in a pop-up
- **Filing category:** Filing category with which the document that triggered the task was filled.
- **Metadata:** metadata associated to the document. To keep low heights lines, only the first two metadata are displayed. Click on the arrow to display the other metadata.
- **Comments:** number of comments related to the document. Click on the number to view comments and add new ones.

By selecting a filter on a filing category or the name of a workflow triggered by a filing category, columns corresponding to the metadata category are added. This allows you to sort the tasks on metadata values.

Tasks processing

Unitary serial processing

To carry out the assigned task, the participant can click on the task's name:



A window opens, offering him on the left, a preview of the document concerned by the workflow. On the right the possible actions:

If the administrator, when setting the workflow, selected a group of users for the next task, then the participant must, at this stage, select the next participant among this group of users.

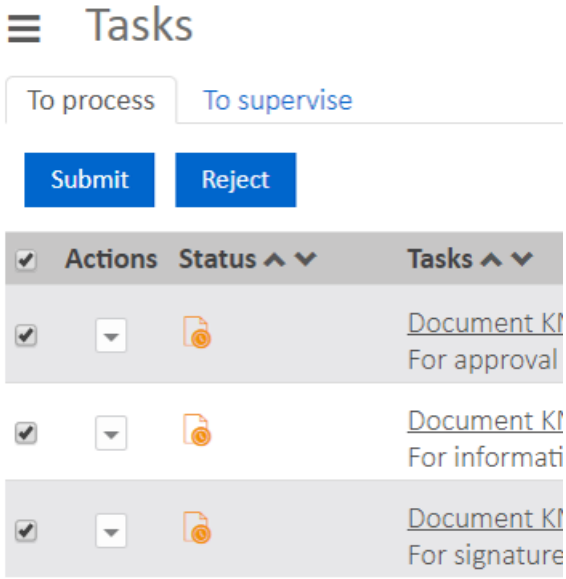
Depending on how the workflow was configured by the administrator, you may have to choose the next task and / or the next task's participant.

Processing tasks in chain

After a task approval, the next task will automatically be presented to the user.

Batch processing

It is possible to "Approve" or "Reject" tasks in batches from the list of tasks:



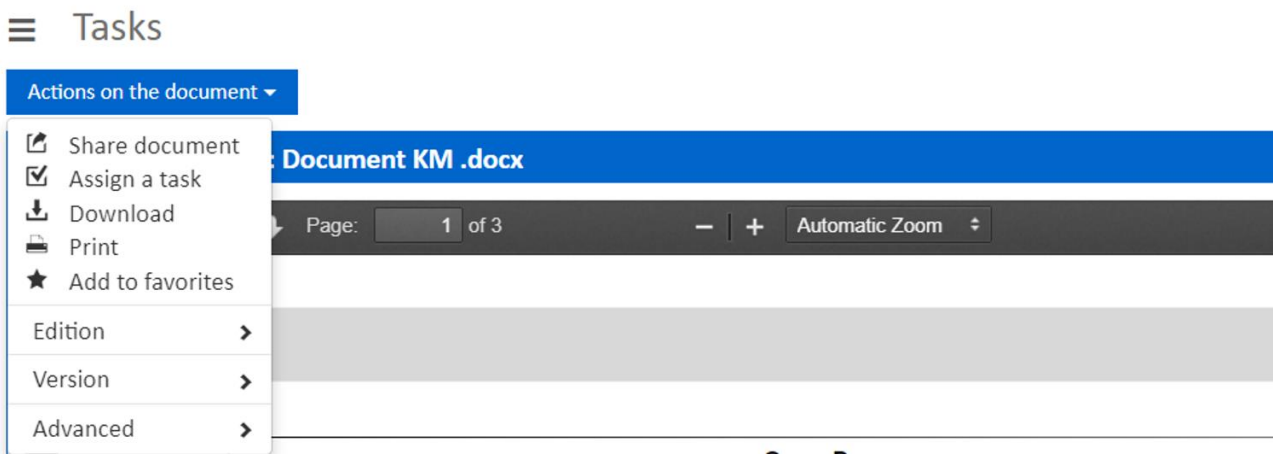
Notify users that a task is done

This feature is available only if the workflow administrator authorized it when setting up the current task.

During the task's validation or rejection, you can choose to send an email notification to a group or a user.

Actions on the document before a task processing

All actions usually available on the document are available from the task's approval screen:



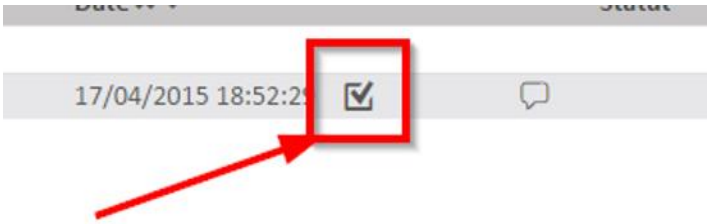
Only actions authorized by the user's permissions on the document are accessible.

In case the task administrator allows it, versions management, management actions and adding versions are available even if the logged in user does not have permission for these actions on the document

Status of a document exiting the workflow

Once the last task in the workflow is completed, the document is displayed in the "Documents" tab.

An icon allows to identify that the document went through a workflow.



Approved document	Rejected document	Document in process
The document has been approved in the workflow.	A participant refused for various reasons to validate his task and the document is rejected from the workflow.	The document is awaiting processing by a user in the workflow. This state is only available if the the workflow administrator has enabled the preview of documents when being processed in the workflow.

A click on this icon displays the history of actions performed on the document while it is being processed by the workflow engine.

> If during the workflow, a participant refused for various reasons to validate his task, the document will then still be filed in the proper folder according to the filing category. Unless the workflow administrator has configured the workflow to move the document to a particular folder during a refusal.

Emails sent by the workflow

This page regroups the various cases for which the workflow is going to send an email to one or several user(s).

How to recieve emails

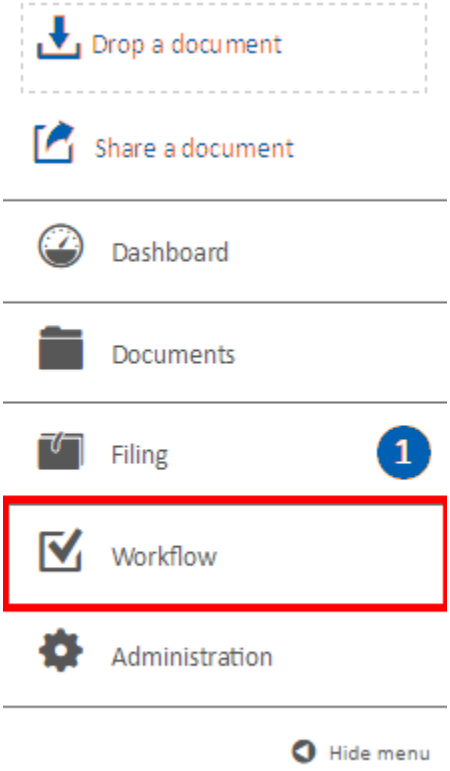
- These emails will only be sent if the related users checked the box **" Notification by email "** in their preferences
- The SMTP parameters must be correctly configured in the administration.

Event	Email recipient
New document pending in a workflow task	User in charge of validating the document
Exiting document from the workflow due to **refusal**	• Workflow supervisor • User to notify selected in the workflow configuration (Preferences Management)
Exiting document from the workflow due to **approval**	• Workflow supervisor • User to notify selected in the workflow configuration (Preferences Management)
A **user** validates a task and chooses a user or a group to notify	The user or group chosen during the task approval.

Workflow monitoring

The supervisor is a user with access to workflow monitoring features. He has access to a tab to monitor the workflow and perform various operations on the workflow.

The supervisor is defined by the administrator during the workflow configuration.



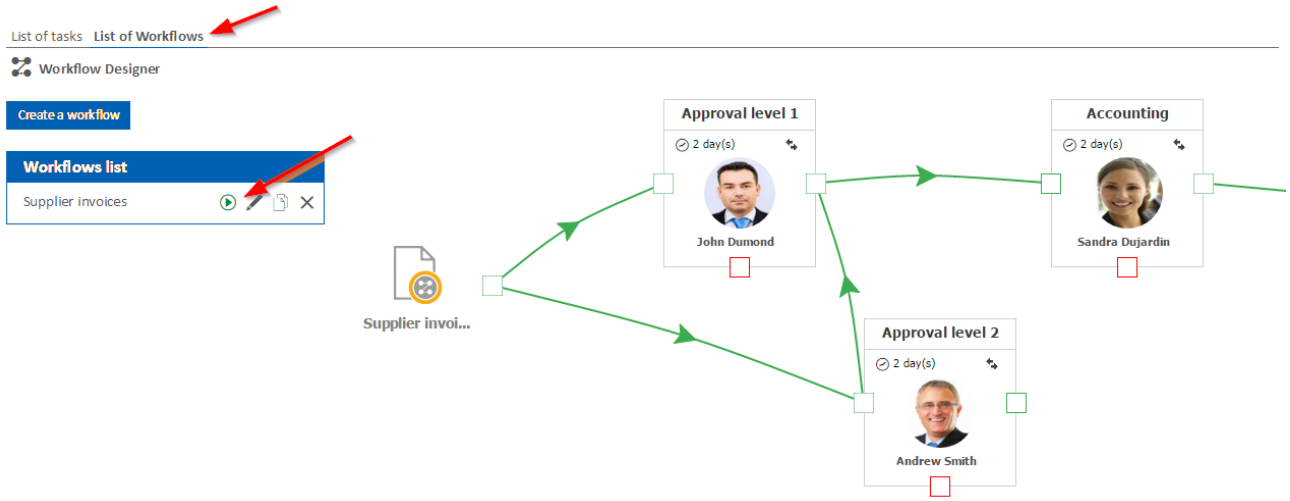
Available features for a supervisor:

- Starting and stopping the workflow
- Tasks tracking
- Changing a task participant

Starting and stopping the workflow

To start processing documents through the created workflow, it is necessary that the workflow supervisor starts the workflow (If it has not already been done by the administrator who created the workflow).

To do this, click on "List of workflows" and click on the green arrow in front of the workflow to be started.



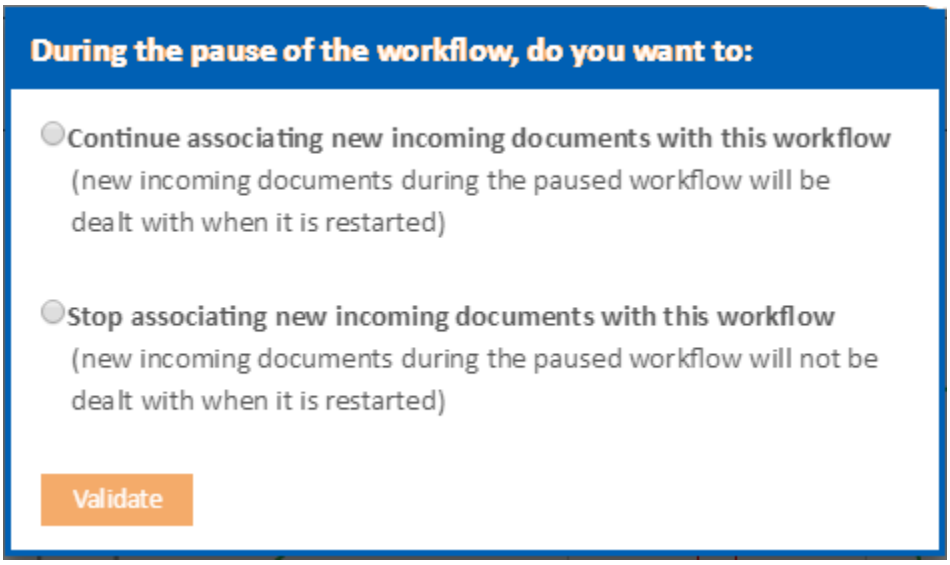
An orange icon indicates that the workflow is started.

Clicking on this same icon then allows to stop / pause the Workflow.

When stopping a workflow, a message appears offering to associate or not the documents at the next restart of this Workflow.

The documents submited to the wrkflow while it's stopped can either:

- be put in a waiting list and be processed when restarting the workflow
- never be processed



You have the ability to pause or stop the workflow at any time.

Pending documents in the workflow can be processed by the users, but no new documents will be added to the workflow.

A workflow's stopping and restarting functions are also accessible from the workflow management interface.

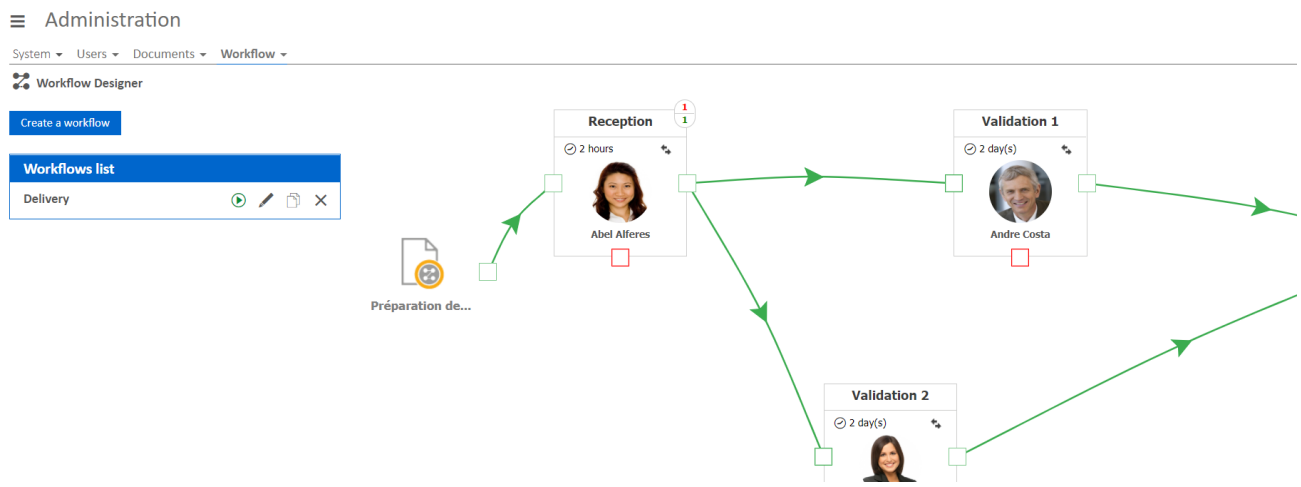
Tasks tracking

- List of workflows
- List of tasks

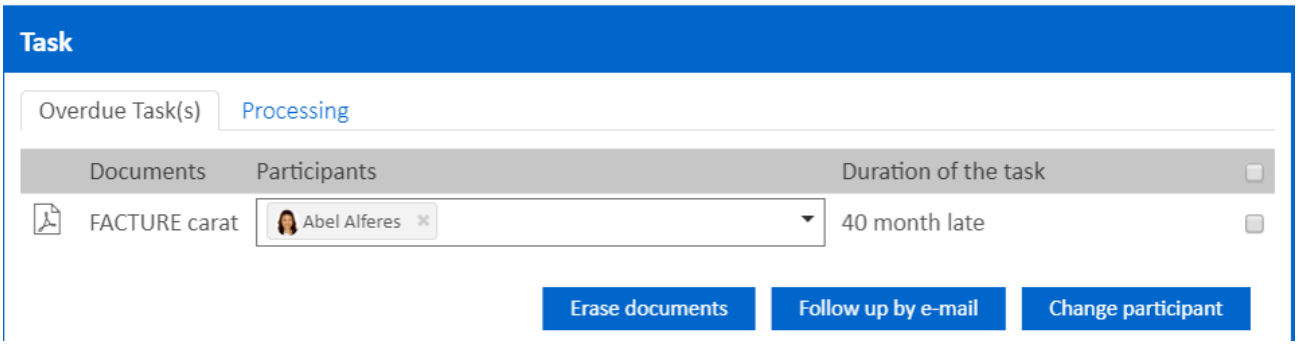
List of workflows

Click on the "**Workflow \ List of Workflows**" menu.

At any time, the workflow supervisor can have a clear view of the number of documents in the workflow and at what stages they are in :



A simple click on the pop-up (green or red) gives the supervisor a specific status:



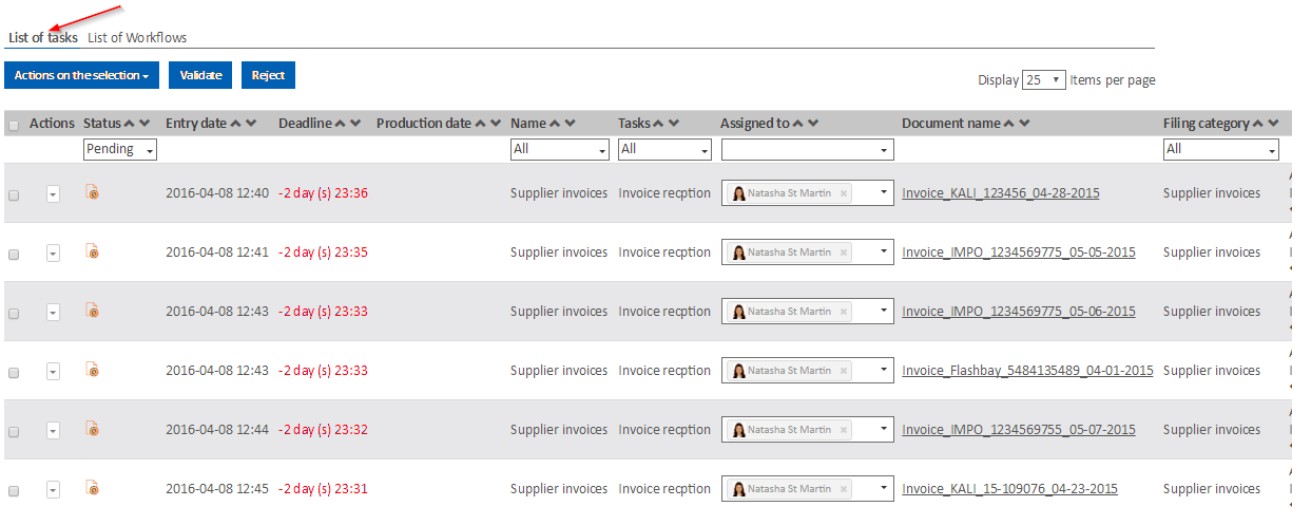
From this screen, you can perform the following operations:

- **Change participant:** You must first change the participant in the "Participant" column for the changes to be applied.
- **Erase documents** : the documents will exit the workflow with the "Rejected" status.
- **Follow up by e-mail:** selected tasks participants will recieve a follow up e-mail

List of tasks

Click on the "**Workflow \ Liste des tâches**" menu.

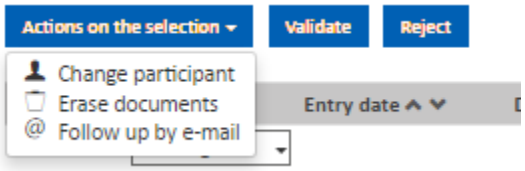
The same information on a Workflow is available from the "List of tasks":



From this screen a supervisor can perform the following operations:

The **"Validate"** and **"Reject"** buttons allow to process tasks in batches. Only tasks assigned to the connected user can be processed.

The **"Actions on the Selection"** button allows operations on several tasks at the same time:



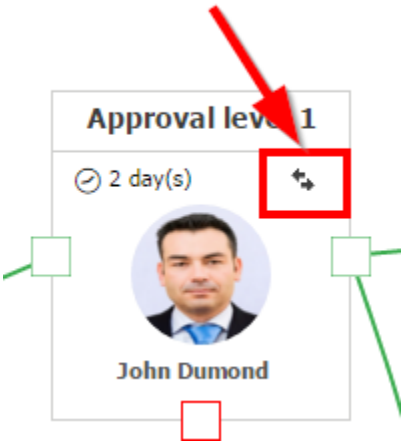
- **Change participant:** You must first change the participant in the "Participant" column for the changes to be applied.
- **Erase documents** : the documents will exit the workflow with the "Rejected" status.
- **Follow up by e-mail:** selected tasks participants will recieve a follow up e-mail

Changing a task participant

Changing a task participant

The worfkflow supervisor can change a participant of a workflow task.

From the "**Workflow \ List of workflows**", click on the "Change participant" button.



It is then possible to select any user or group as a new task participant.

Changing participant retroactivity

If documents are pending in the task, you will be asked whether those documents should be allocated to the new participant, or remain assigned to the previous participant.

Changing participant for pending documents

It is also possible to change the participant for pending documents, without changing the task participant.

Thanks to this feature, a supervisor may decide to delegate the processing of one or more documents to a particular user.

Refer to the Tasks tracking section for this operation.

Using a digital safe box

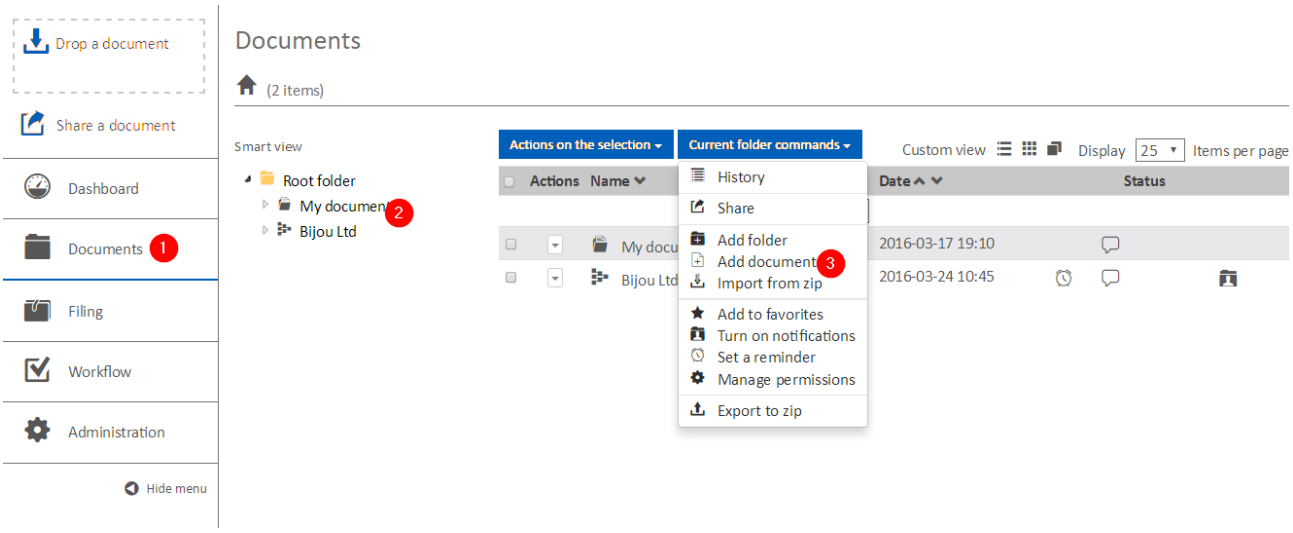
- Management of digital items
- Integrity and grouped management of digital items

Management of digital items

Filing a digital item

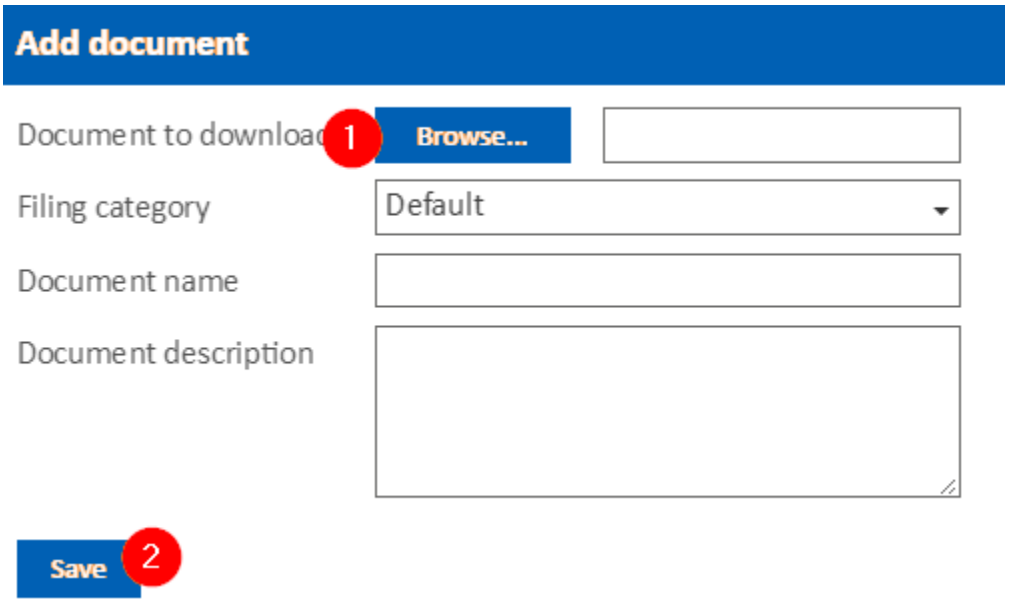
To add a document (digital item) in a Secured Conservation Space:

1. Clik on the "**Documents**" tab
2. Navigate through the folder tree to the Secured Conservation Space folder
3. Click on "**add document**"



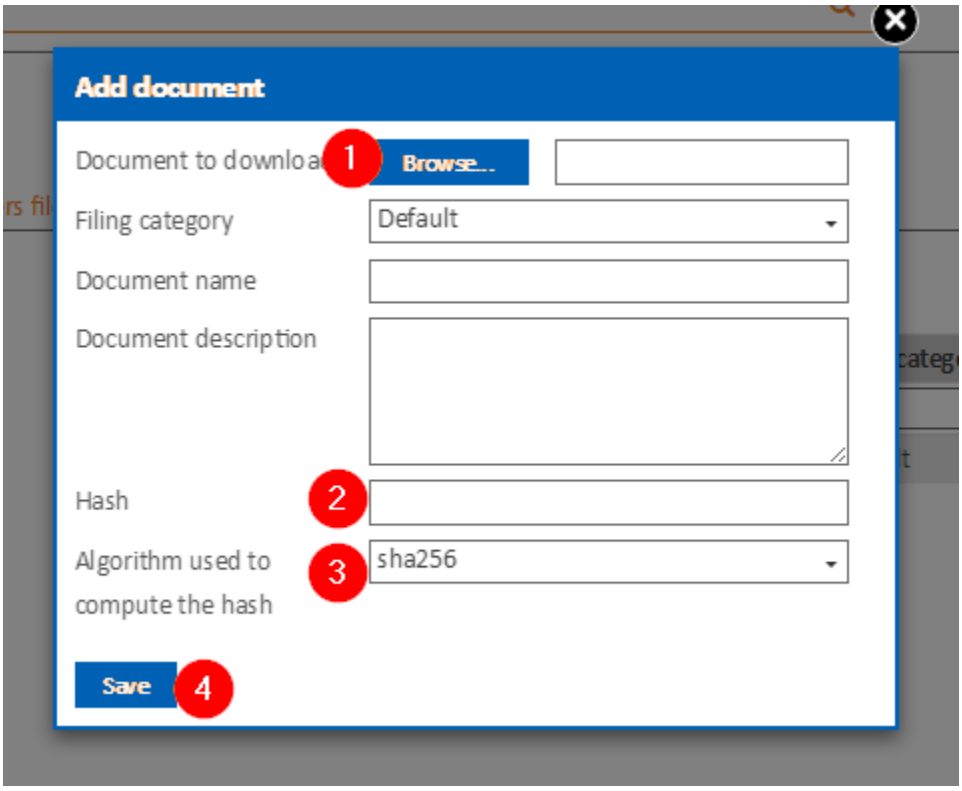
Deposit in uncontrolled mode

Select the document from your PC and click **"Save"**:

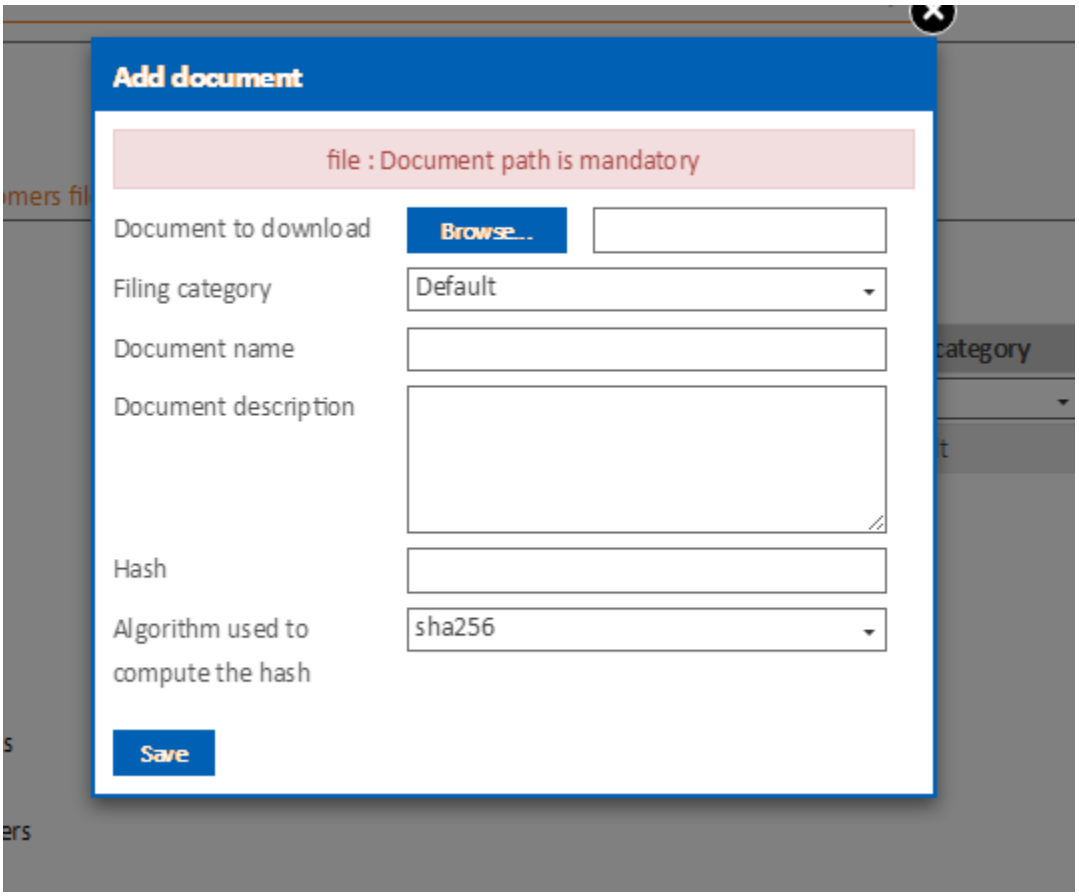


Deposit in controlled mode

1. Select the document from your PC as for the uncontrolled mode
2. Enter the document hash
3. Enter the algorithm that was used to calculate the hash
4. Click on "**Save**"

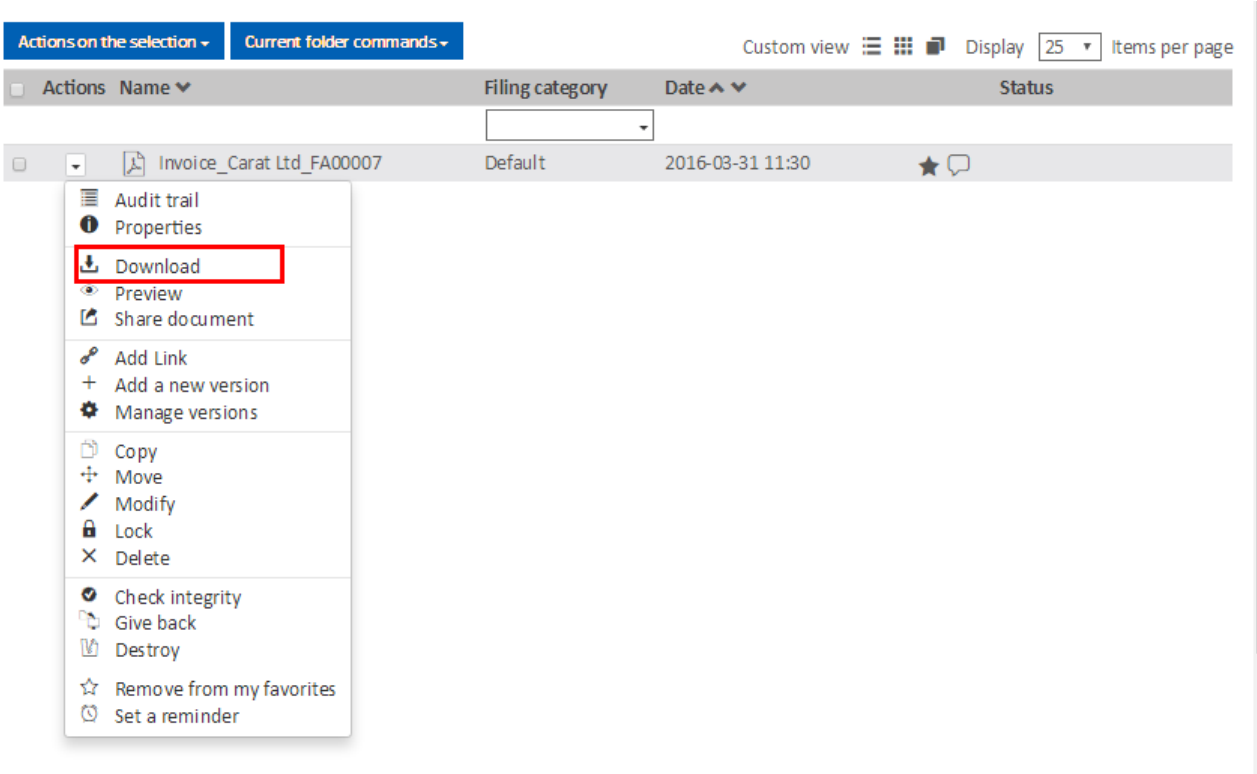


If the hash does not match the uploaded document, the deposit will be refused



Reading a digital item

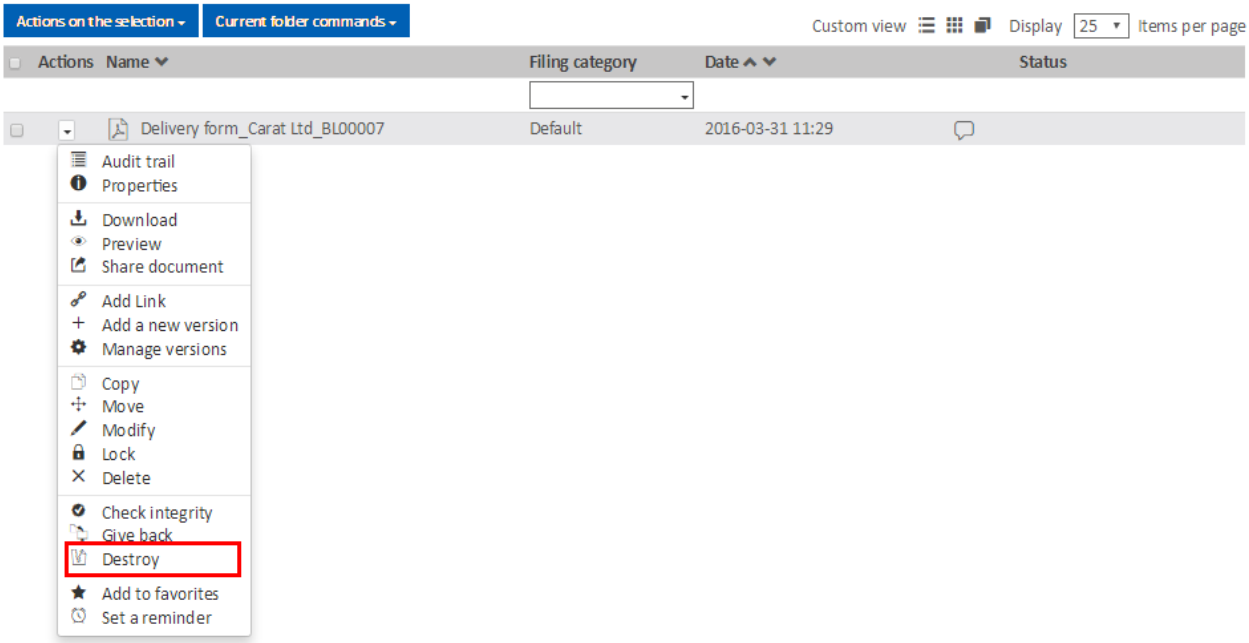
To read a document, click **"Download"** from the menu on the document and consult the document from your workstation.



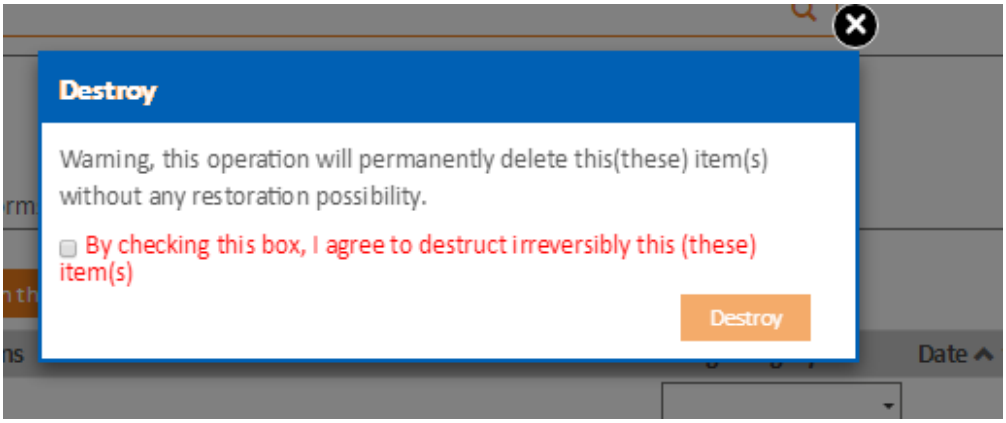
Destroying a digital item

To permanently remove a document without the possibility of restoration, click **"Destroy"** from the menu on the document.

This operation is non-reversible. No one will be able to restore your documents once it has been destroyed.



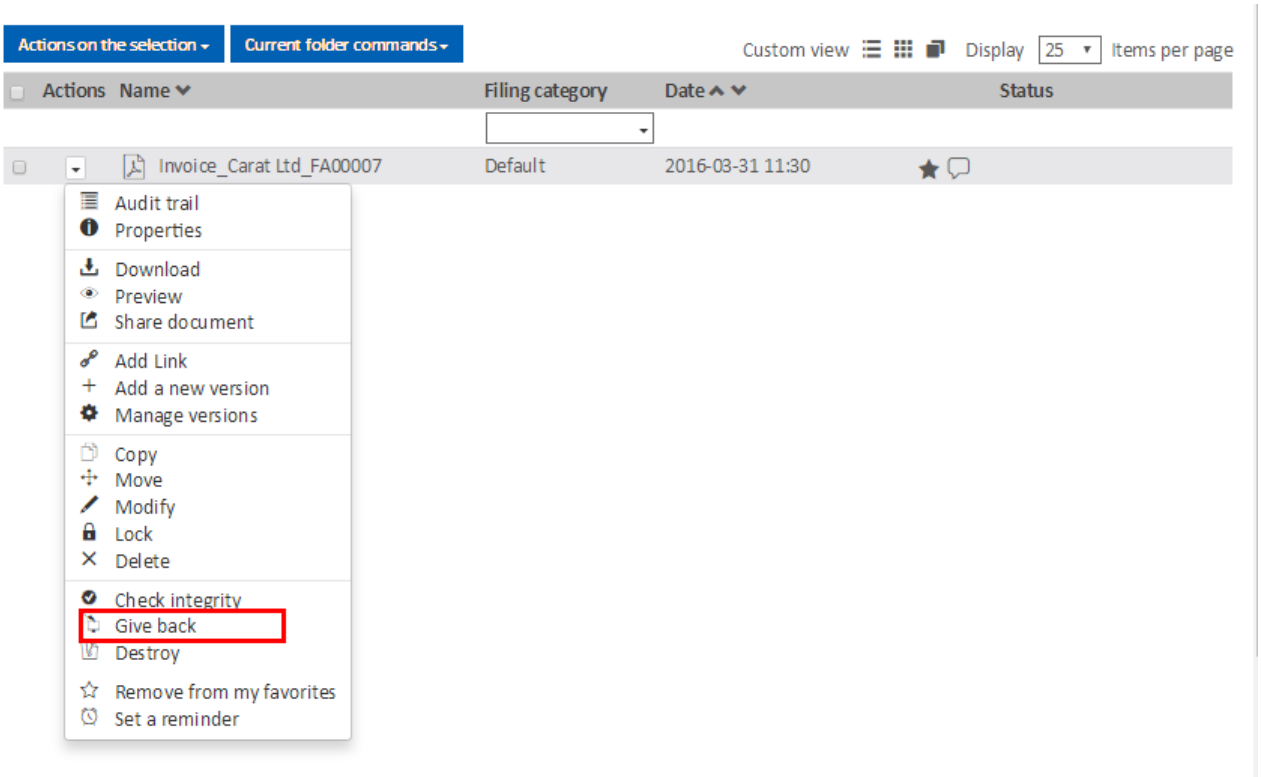
A confirmation window appears, it is necessary to tick the check box before validating the destruction.



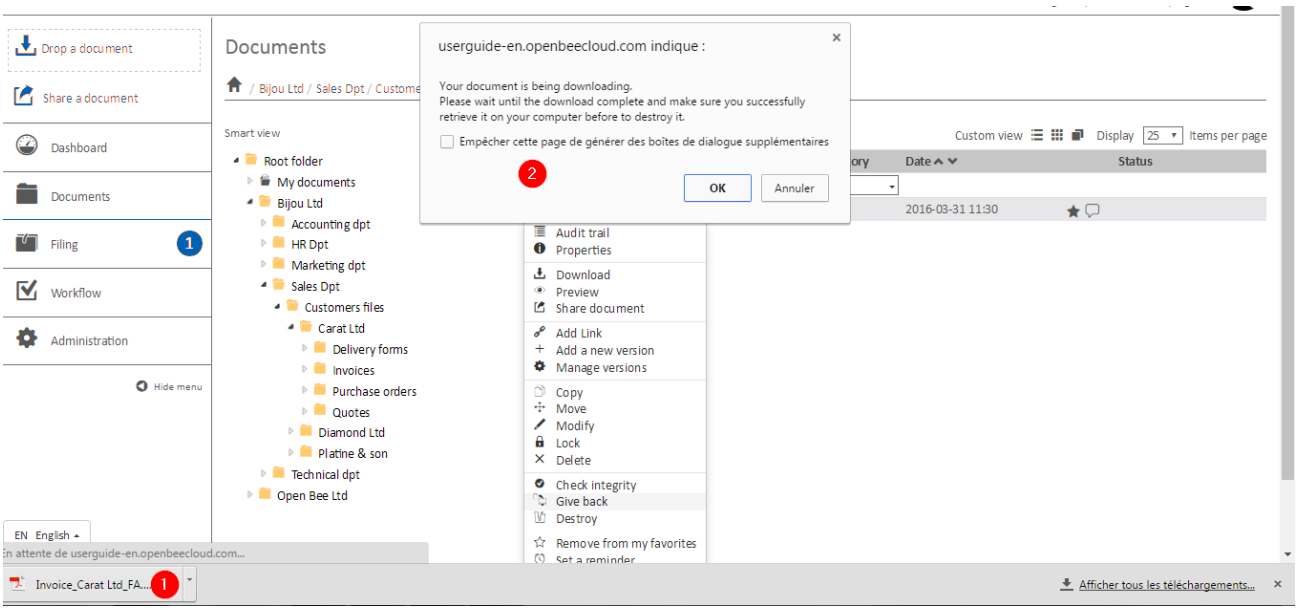
Restitution of a digital item

The document restitution is the combination of downloading and destruction operations.

To restitue a document, click on **"Give back"** from the menu on the document.

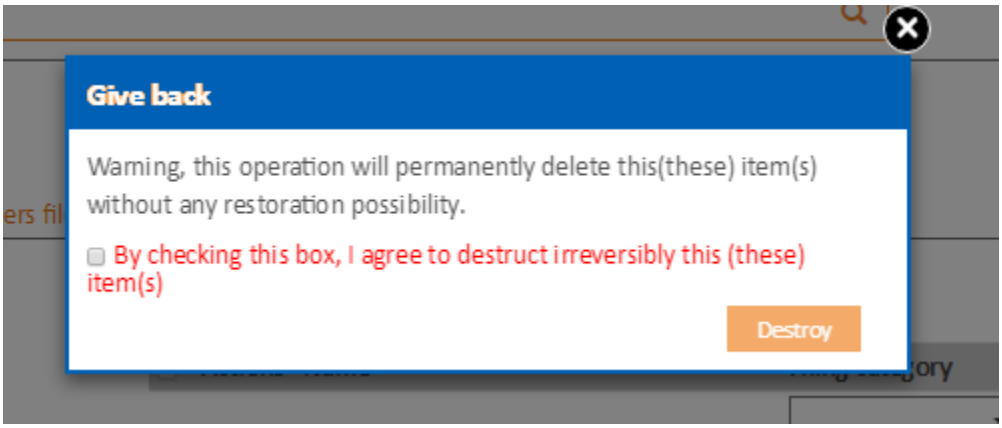


1. The document download begins
2. A window tells you to wait until the download is complete and check the successful recovery of the document on your workstation before proceeding with its destruction.



Once the document is recovered, a new window prompts you to proceed with the destruction of the document.

This operation is irreversible, nobody will be able to restore your document once the recovery process is complete and the document destroyed.



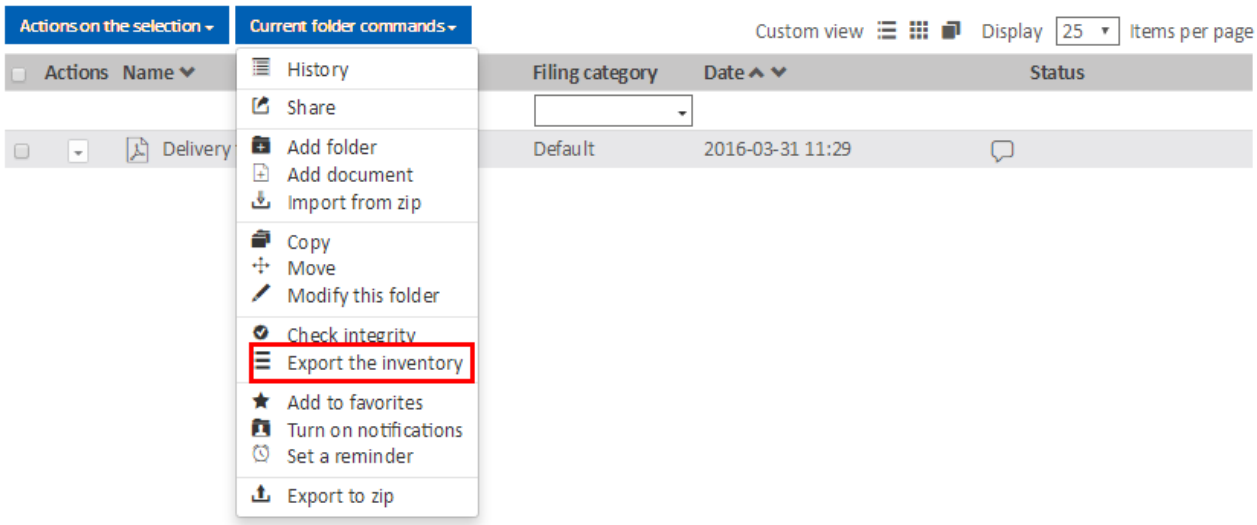
Integrity and grouped management of digital items

- Secured Conservation Space items inventory
- Integrity check of a digital item
- Integrity check of the Secured Conservation Space
  - By the manager
- Clearing a Secured Conservation Space

Secured Conservation Space items inventory

The Secured Conservation Space items inventory is viewable in a CSV file form.

To view the inventory, click **"Export the inventory"** from the menu on the Secured Conservation Space folder.



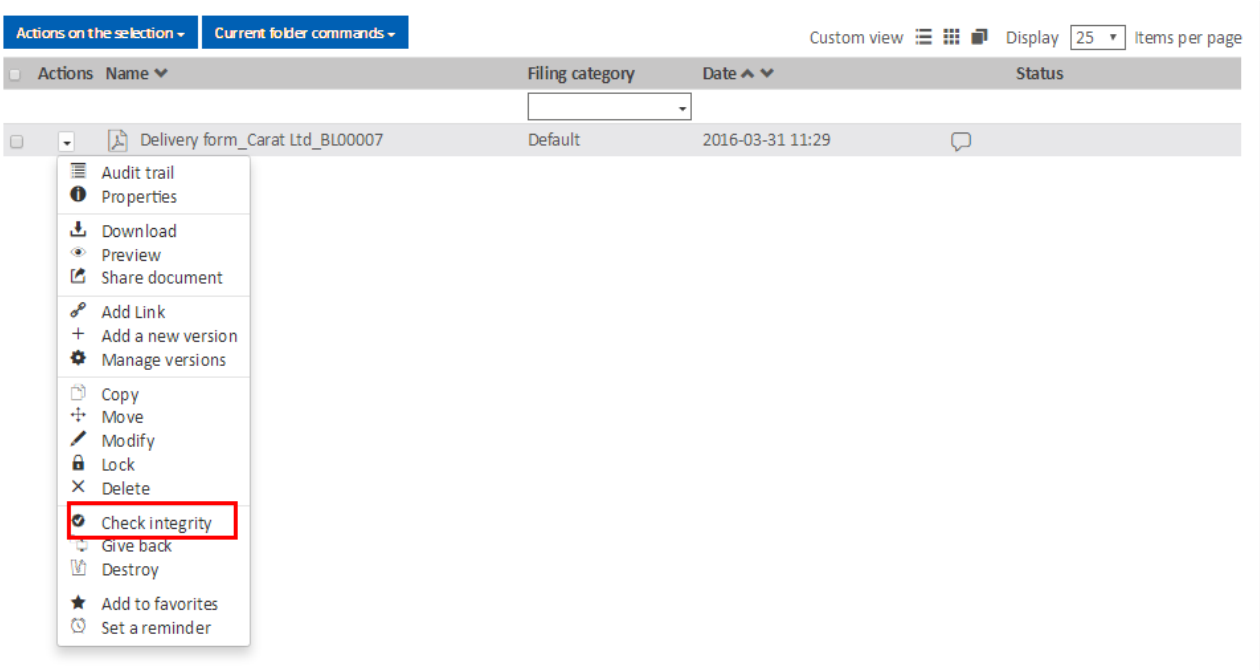
A CSV file is downloaded with the following columns:

- id_document_version: document's version unique identifier
- id_document: unique document identifier
- name: document name
- description: document description (Optional field)
- size : document size in bytes
- md5 : the document hash calculated with the MD5 algorithm
- sha256 : the document hash calculated with the SHA256 algorithm
- path : the document path in the KOMI Doc tree structure.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	id_document_version	id_document	extension	name	Description	size	md5	sha256	path				
2	330	708	pdf	20110726170150		146651	d634602684fa105c62901	c2ae4db29c125	/Natasha/Mes factures/20110726170150.pdf				
3	331	709	pdf	20110726170152		137690	ea1bc776a7d47433c53f	fa89e0a4ebb13	/Natasha/Mes factures/20110726170152.pdf				
4	328	705	pdf	20110726170149		77659	eea81383c419db4e60de	333cfa62ed5fcc	/Natasha/20110726170149.pdf				
5	329	706	pdf	20110726170150		146651	d634602684fa105c62901	c2ae4db29c125	/Natasha/20110726170150.pdf				
6													
7													
8													
9													
10													

Integrity check of a digital item

To check a document integrity, click on **"Check integrity"** from the menu on the document.

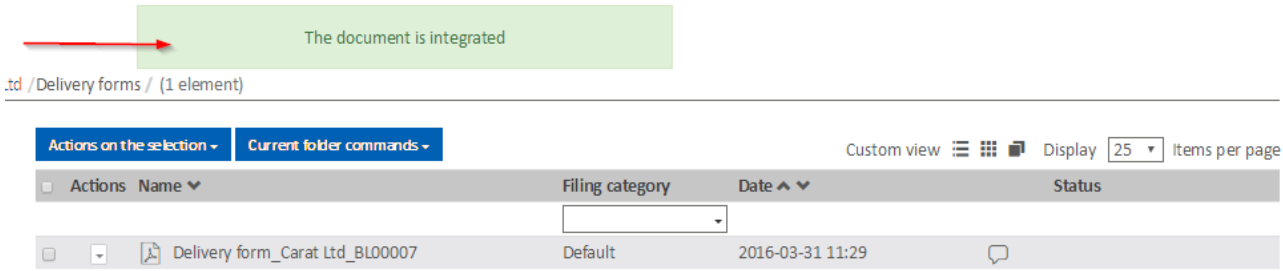


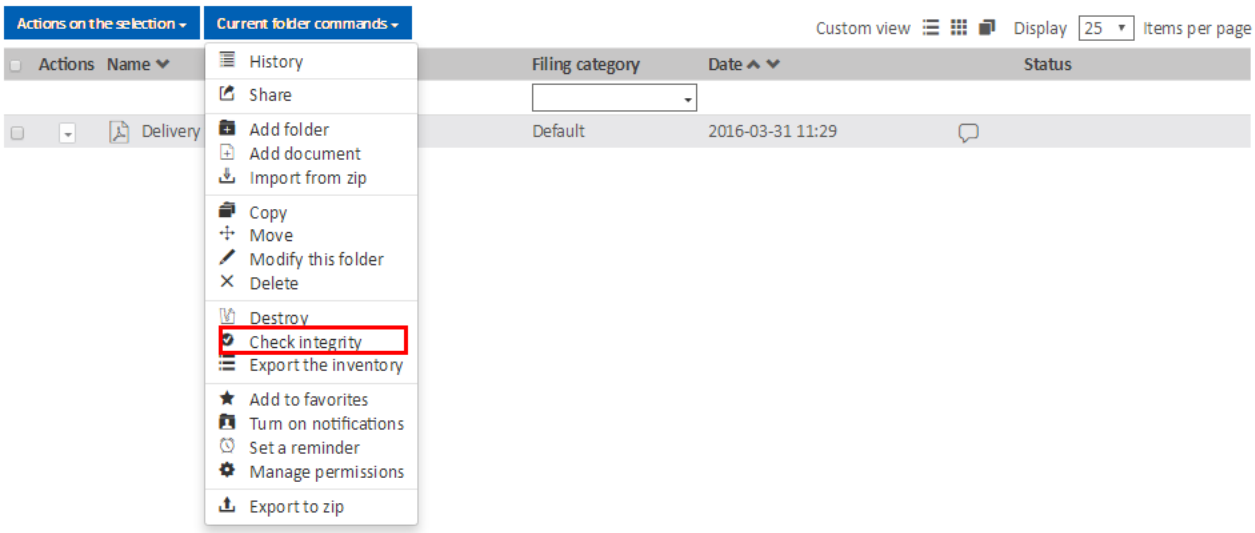
Following this action, the document integrity will be checked as follows and the operation result will be displayed on the screen:

Integrity check of the Secured Conservation Space

By the manager

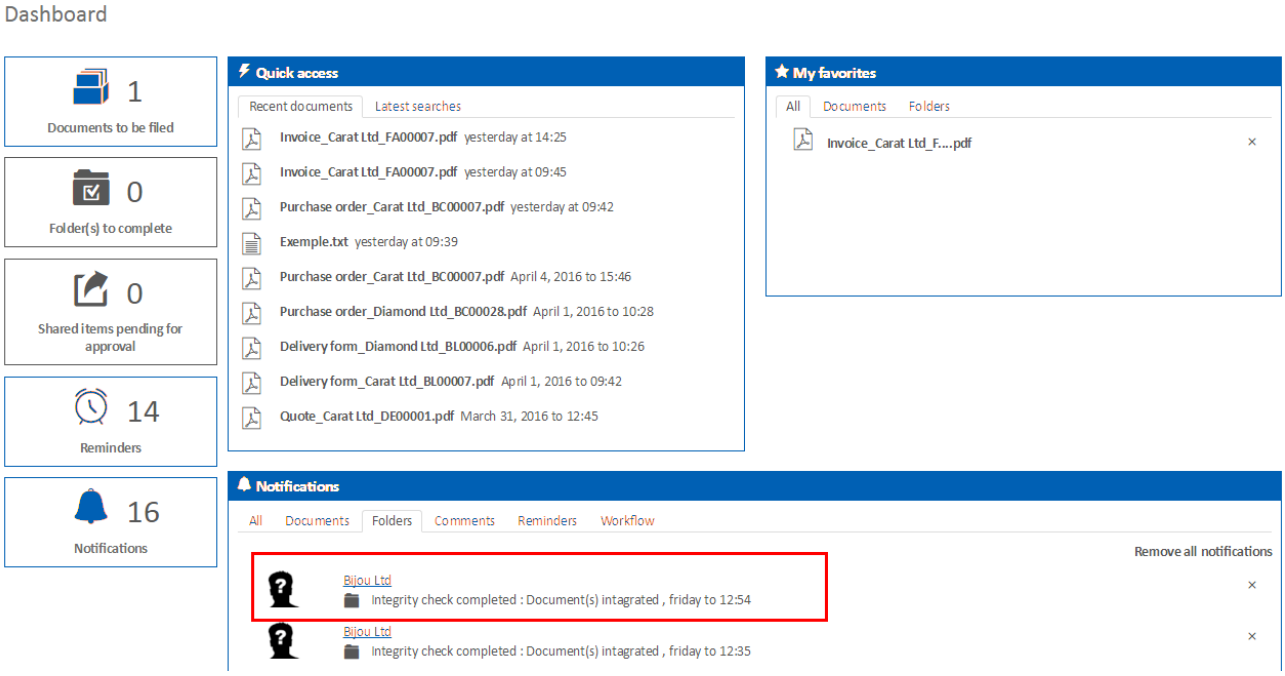
To check a Secured Conservation Space integrity, click on "Check integrity" from the menu on the Secured Conservation Space folder.





A Secured Conservation Space integrity check will verify the integrity of all the Secured Conservation Space documents, one by one. This operation can take some time, it is carried out asynchronously on the KOMI Doc server.

Once finished, the result is displayed in the **"Notifications"** tab in the Dashboard



Clearing a Secured Conservation Space

The Secured Conservation Space manager may decide to clear it at any time. This allows to recover:

- all of its documents
- documents Inventory
- the Secured Conservation Space transactions

To clear a Secured Conservation Space, click on **"Clear the folder"** from the menu on the Secured Conservation Space folder.

Two options are available:

- Export to a downloadable ZIP. This option lets you recover data easily, but is limited to a volume of 4 GB.
- Export to a server file: in this case the data is exported to the server without volume limit

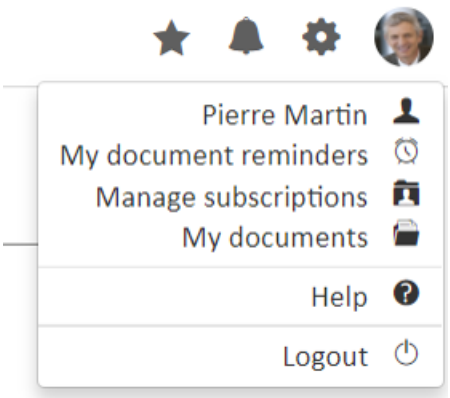
As for the Secured Conservation integrity check, this operation can take some time. It is therefore achieved asynchronously on the KOMI Doc server.

Once completed, a notification is displayed on all screens to allow the user to retrieve the content of his Secured Conservation Space.

User preferences

Click on the user's picture.

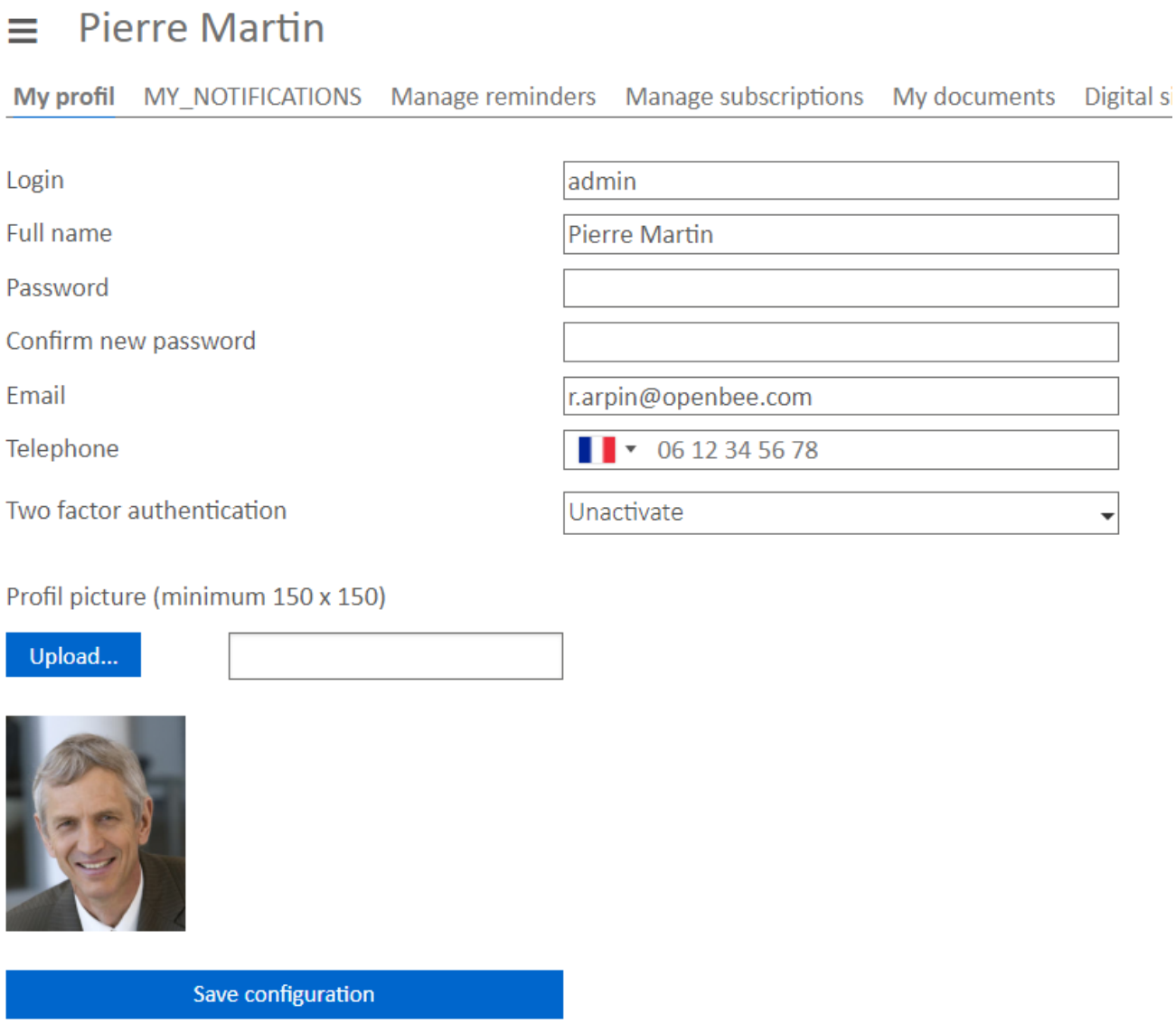
The user preferences are located on the top right corner of the screen. A menu allowing to access the **"user"** different preferences will appear.



The following elements are available:

- Profile
- Reminders
- Subscriptions
- My documents
- Electronic Signature

Profile



This screen allows the modification of the following elements:

- **Full name:** the user's name as seen by other users
- **Password:** allows to change the password.
- **Email:** used email to communicate with the user.
- **Phone:** optional field for the phone number
- **Frequency of notification:** These fields allow you to define the email notification sending policy.
    - Immediately: as soon as an event occurs, it triggers the creation of a notification and an email is sent
    - Once a day: an email with all notifications issued during the day is sent every night

  - Once a week: an email with all notifications issued during the last 7 days is sent on the night of Monday to Tuesday.
  - Never: no email will be sent for this notification's type
- Email notification: unchecking this box disables the sending of any email notification.
- Profile picture: allows to change the picture

Reminders

Allows viewing and modifying in a centralized manner the reminders defined by the logged in user. Refer to the "Reminders on documents and folders" section for more details about this feature.

Subscriptions

Allows viewing and modifying in a centralized manner the logged in user subscriptions.

Refer to the "Notifications management" section for more details about this feature.

My documents

This element is a simple shortcut to the User folder.

Electronic Signature

This tab allows to define an electronic signature specific to the logged-in user.

It can then be used to Sign documents electronically .