



KONICA MINOLTA

KOMI Doc Office Manager User guide (EN)

✎ Version: 1.0



Table of contents

• Installer guide	3
• <i>Hardware and software requirements</i>	3
• <i>Installing KOMI Doc Office Manager</i>	4
• <i>Update procedure</i>	6
Update of 5.2.X towards 5.7.X or 5.8.X	7
Update of 5.7.X towards 5.8.X or 5.7.X/5.8.X towards 6.X	7
• <i>Installation in a TSE environment</i>	7
• Administrator Guide	9
• <i>Product activation</i>	9
• <i>Configuration of the document manager server (KOMI Doc)</i>	10
• <i>Installing Add'ins</i>	13
Installing Windows Explorer	14
Installing Microsoft Excel	15
Installing Microsoft Outlook	16
Installing Microsoft PowerPoint	17
Installing Microsoft Word	17
• User guide	19
• <i>Using the "Filing into KOMI Doc" window</i>	19
• <i>Using advanced indexation</i>	22
• <i>Filing documents with Windows Explorer</i>	25
Filing a folder	25
Filing a document	26
• <i>Filing Microsoft Word documents</i>	26
• <i>Filing Microsoft Excel documents</i>	26
• <i>Filing Microsoft PowerPoint documents</i>	27
• <i>Filing Microsoft Outlook documents</i>	27

KOMI Doc Office Manager is a software solution you can use to dynamically file all your MS Office documents (Word, Excel, and PowerPoint) and e-mails (Outlook), directly from your Microsoft application into KOMI Doc.

The user guide of KOMI Doc Office Manager for Windows contains recommendations, tips and suggestions to maximize your use of KOMI Doc Office Manager. To leverage the full potential of this guide, please familiarize yourself with the concepts and configuration procedures described in this guide, and in the documentation related to KOMI Doc, the documents management Web module (DMS).

For more information or to view documents about the topics covered in this document, please refer to [Konica Minolta Website](http://www.konicaminolta.fr), at the following address: <http://www.konicaminolta.fr>.

This manual has been written and published under [Konica Minolta](http://www.konicaminolta.fr), supervision, and it covers the latest product description and specifications.

All wordings, product references, recommendations and content are subject to change without notice.

[Konica Minolta](http://www.konicaminolta.fr) reserves the right to change, without prior notice, all specifications and information in this manual and will not be held responsible for any damage (including indirect damage) due to the information herein, including, but not limited to, typos and other errors related to the manual.

Installer guide

KOMI Doc Office Manager is a software solution developed for the filing and indexation of documents in KOMI Doc. The type of the Microsoft Office document to be file can be Microsoft Word, Microsoft Excel, Microsoft PowerPoint or Microsoft Outlook.

The three basic features are:

- Filing and indexation in KOMI Doc of Microsoft Office documents directly from Microsoft Word, Microsoft Excel and Microsoft PowerPoint.
- Filing and indexation in KOMI Doc of one or more Microsoft Office documents at the same time (multiple selection or selection of a documents folder) directly from Windows Explorer's contextual menu.
- Filing and indexation in KOMI Doc from Microsoft Outlook:
 - Filing an email in PDF format, with its attachments.
 - Filing of one or more attachments only.

When you file an email, the original email is not deleted from your mailbox.

- [Hardware and software requirements](#)
- [Installing KOMI Doc Office Manager](#)
- [Update procedure](#)
- [Installation in a TSE environment](#)

Hardware and software requirements

- A processor Intel Core™ 2 Duo or equivalent (a processor Intel® I5 is recommended)
- Microsoft® Windows® 7 SP 1 (professional versions 32 and 64 bits), Microsoft® Windows® 8 (professional versions 32 and 64 bits), Microsoft® Windows® 10 Pro, Microsoft® Windows® 2003, 2008 or 2012 Server
- Microsoft Office 2007, Microsoft Office 2010, Microsoft Office 2013 or Microsoft Office 2016
- Microsoft® Framework .Net 4
- 1 GB RAM
- 200 MB free space on the hard drive
- Screen resolution 800x600 or above
- TCP/IP network card
- Internet access

KOMI Doc Office Manager only works with **KOMI Doc** electronic document management servers **version 6.9 or above**.


The use of KOMI Doc Office Manager requires an administrator account on the local machine where it is installed.

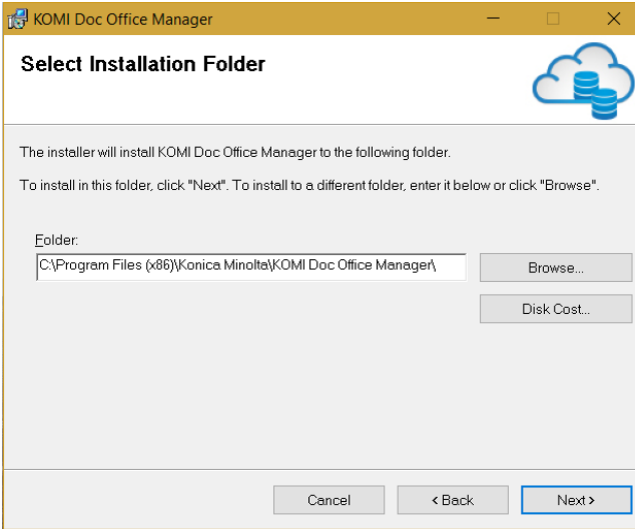
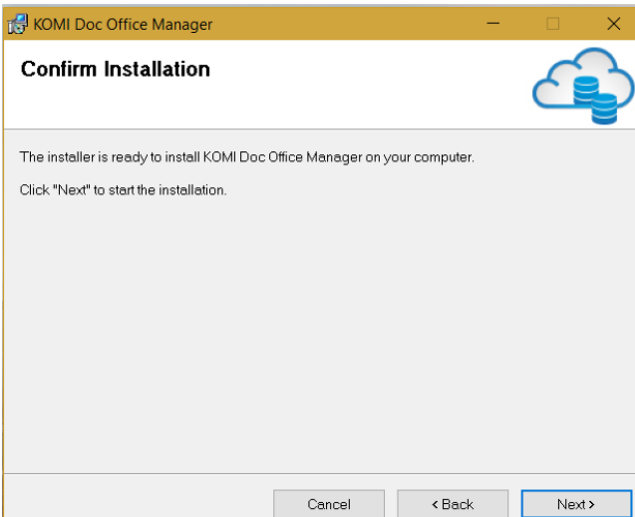
Installing KOMI Doc Office Manager

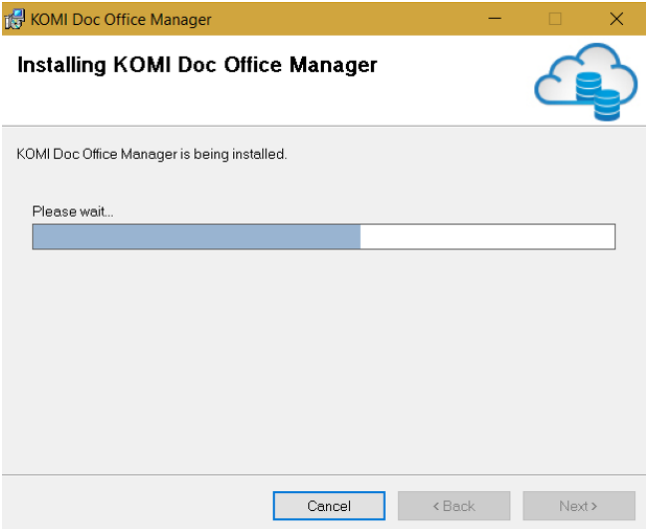
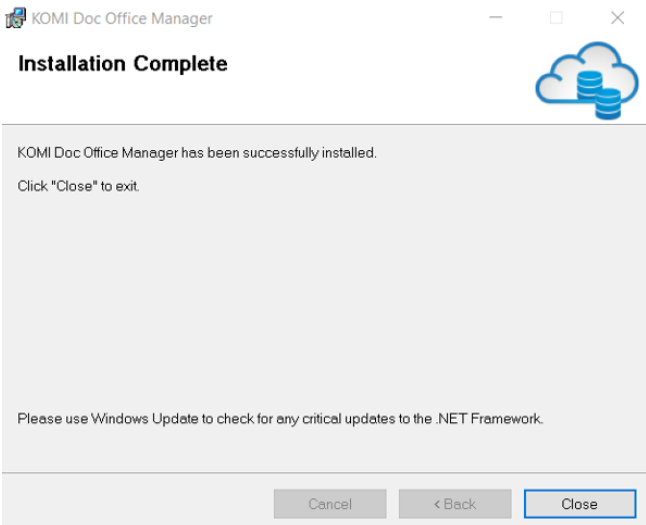
The installation section of KOMI Doc Office Manager will guide you step by step through the software installation process.

Make sure you have closed all Microsoft Office applications before installing KOMI Doc Office Manager

The different steps of the installation:

Description	Illustration
1. Double-click the « .exe » to run the Installer.	
2. The home page displays.. Click on « Next »	

Description	Illustration
<p>3. Click on « Browse... » to select where you want to install the software.</p> <p>4. Click on « Next » when you have chosen a location.</p>	 <p>Select Installation Folder</p> <p>The installer will install KOMI Doc Office Manager to the following folder.</p> <p>To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".</p> <p>Folder: <input type="text" value="C:\Program Files (x86)\Konica Minolta\KOMI Doc Office Manager\'"/> <input type="button" value="Browse..."/></p> <p><input type="button" value="Disk Cost..."/></p> <p><input type="button" value="Cancel"/> <input type="button" value=" < Back"/> <input type="button" value=" Next >"/></p>
<p>5. A confirmation page displays. Click on « Next » to start the installation.</p>	 <p>Confirm Installation</p> <p>The installer is ready to install KOMI Doc Office Manager on your computer.</p> <p>Click "Next" to start the installation.</p> <p><input type="button" value="Cancel"/> <input type="button" value=" < Back"/> <input type="button" value=" Next >"/></p>

Description	Illustration
6. Wait until the installation is done.	
7. The installation is finished.. Click « Close »	

Update procedure

Before any update your solution, it is imperative to make a backup of your current installation.

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

Update of 5.2.X towards 5.7.X or 5.8.X

Saving the current configuration

Save the content of the folder *C:\Program Files (x86)\Microsoft Office\OfficeManager\Configuration* or *C:\Program Files\Microsoft Office\OfficeManager\Configuration* (depending on your operating system).

Update

- Uninstall the 5.2.X version from the menu « **Start** » -> « **Konica Minolta** » -> « **Uninstall KOMI Doc Office Manager** »
- Then double-click the new installer and follow the instructions provided.
- Once the installation is complete, KOMI Doc Office Manager has been updated.

Test

Proceed with a filing test to KOMI Doc in order to verify proper operation.

Update of 5.7.X towards 5.8.X or 5.7.X/5.8.X towards 6.X

Saving the current configuration

Save the content of the folder *C:\Users\%username%\AppData\Roaming\KonicaMinolta\OfficeManager\Configuration*

Update

Refer to the installation page of KOMI Doc Office Manager

Test

Proceed with a filing test to KOMI Doc in order to verify proper operation.

Installation in a TSE environment

- Log on to the TSE server as an administrator.
- Launch the installer and follow the steps as for installation on a client computer. If you get an error while launching :

- Rename the installer to .zip (instead of .exe).
 - Unzip the file.
 - Launch/start the extracted .msi.
- Install [add-ins](#) . At this stage, it is indispensable that all Microsoft Office applications are closed on all user sessions.
- Publish the server configuration utility to make it accessible by all TSE sessions.
- Each user can now configure their connection to the server using the Configuration Utility and classify/archive documents from Microsoft Office.

Administrator Guide

- [Product activation](#)
- [Configuration of the document manager server \(KOMI Doc\)](#)
- [Installing Add'ins](#)
 - [Installing Windows Explorer](#)
 - [Installing Microsoft Excel](#)
 - [Installing Microsoft Outlook](#)
 - [Installing Microsoft PowerPoint](#)
 - [Installing Microsoft Word](#)

Product activation

The current version of **KOMI Doc Office Manager** (version 6 and above) activates automatically at the time of connecting with **KOMI Doc** (version 6 and above) if the option is activated via the license key of **KOMI Doc**. In this case, the tab "Activation" of the window "Add-in Manager" is not visible.

In the opposite case (KOMI Doc version lower than V6), it is mandatory to activate the software to make it work. The procedure takes only a few seconds.

Please start the module « **KOMI Doc Office Manager - Add-in Manager** » :

- In the menu « **Start** », click on « **KOMI Doc Office Manager - Add-in Manager** » in "All programs / **Konica Minolta** / **KOMI Doc Office Manager - Add-in Manager**".

Or



- Double click on the icon « **KOMI Doc Office Manager - Add-in Manager** » which was created on the Windows desktop by the installation program.



To activate the software:

Fill in your details in the section "**Customer details**" in the "Activation" tab.

In the zone « **Activate KOMI Doc Office Manager** » copy in the field « **license** » the number of the software license and click on « **Activate** »

The icon "  " informs you that your license is valid. Otherwise, this icon "  " will appear.

A label with the serial number and activation code has been supplied to you. This number represents your license. It is confidential.

KOMI Doc Office Manager integrates 2 modes for its activation:

Online mode:

An Internet connection is required for this mode.

The user enters their contact information in the appropriate fields and registers by the button « **Save** »

Off line mode: The user communicates contact information, serial number and the product number generated by the system "ID Machine" that appears on the screen. In return, an email with the license key will be sent to the user, who only has to enter it manually to enable its implementation.

Configuration of the document manager server (KOMI Doc)

Use this step to set the communication parameters with your KOMI Doc.

Start the « **KOMI Doc Office Manager - Configuration** » module:

- In the « **Start** », menu, click « **KOMI Doc Office Manager - Configuration** » under « **All programs / Konica Minolta / KOMI Doc Office Manager - Configuration** »

Or

- Double-click the « **KOMI Doc Office Manager - Configuration** » icon that was created on your Windows desktop by the Installer.



This window displays:

KOMI Doc Office Manager - Configuration

KOMI Cloud settings

URL or IP Address http://

☐ SSL

User

Password

☐ Configure a proxy server

Configuration

URL or IP Address :

☐ Proxy authentication

Login

Password

KOMI Cloud data usage settings

☐ Use the KOMI Cloud cached data ?

✓ Save

It is possible to connect with KOMI Doc in SaaS mode, as well as with HTTPS secured mode.

1. Type in the IP address (or URL) for your KOMI Doc server. You can check the SSL checkbox to automatically switch the connection to KOMI Doc in secure mode, if this feature is activated on your server.
2. If you use SSL (port 443), skip to step 4, otherwise inform the port connected to your KOMI Doc IP/URL (generally, this is either port 8000 or port 80).
3. Enter your username KOMI Doc
4. Enter your password
5. If you use a proxy check "Configure a proxy server" and configure the proxy connection to your network.

KOMI Doc Office Manager - Configuration

KOMI Cloud settings

URL or IP Address

☐ SSL

User

Password

☐ Configure a proxy server

Configuration

URL or IP Address :

☐ Proxy authentication

Login

Password

KOMI Cloud data usage settings

☐ Use the KOMI Cloud cached data ?

☒ Save

If you use a proxy, click "**Configure a proxy server**". Two configuration methods are available:

- **Automatic configuration.** Click "**Detect settings automatically**" and then select "**Save**".
- **Manual configuration.** Click "**Manually set proxy settings**"; fill in the fields below, and then select "**Save**".

KOMI Doc Office Manager - Configuration

KOMI Cloud settings

URL or IP Address

☐ SSL

User

Password

☒ Configure a proxy server

Configuration

URL or IP Address :

☐ Proxy authentication

Login

Password

KOMI Cloud data usage settings

☐ Use the KOMI Cloud cached data ?

☒ Save

Click "**Save**" to save the settings of the KOMI Doc.

A communication test is run during the saving process in order to test the parameters. A tooltip appears in the Windows notifications bar to inform you of the test results.

KOMI Doc Office Manager works with electronic document management solution **KOMI Doc** in 5.2 version or above.

Installing Add'ins

Start the « **KOMI Doc Office Manager - Add-In Manager** » module:

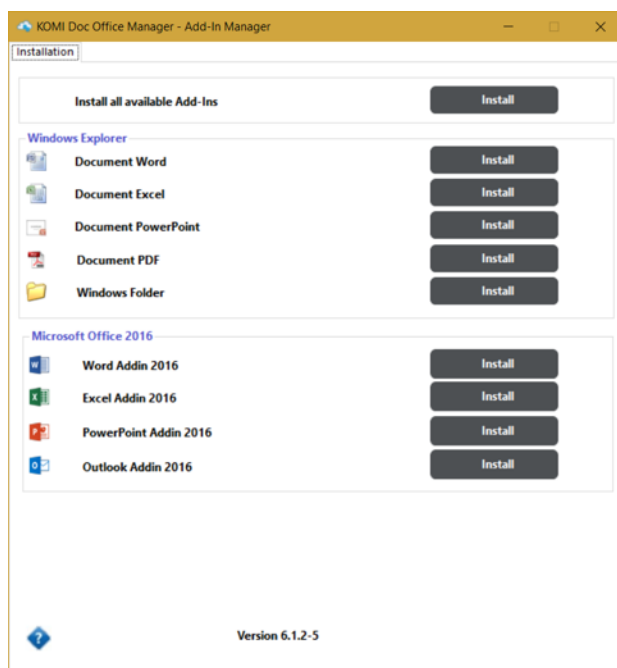
- In the "Start" menu, click on « **KOMI Doc Office Manager - Add-In Manager** » under « **All Programs / Konica Minolta / KOMI Doc Office Manager - Add-In Manager** »

Or

- Double-click the « **KOMI Doc Office Manager - Add-In Manager** » icon that was created on your Windows desktop by the Installer.



In the Add-in Manager's "**Installation**" tab, you can activate or deactivate all of the Office add-ins.

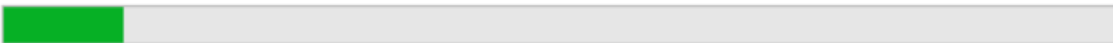


Click the "**Install all available Add-Ins**" to start installing all of the add-ins.



The bar at the bottom of the window indicates the status of add-ins installations

Document Word Plug-In is installing...

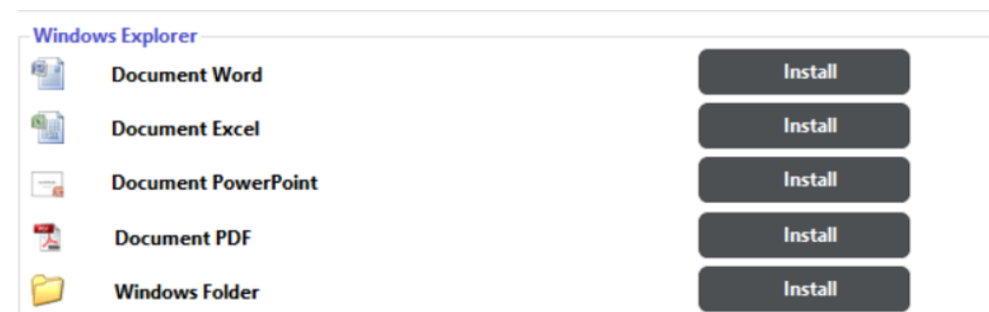


You can also choose to install each add-in individually. To do so, follow the instructions in the following paragraphs:

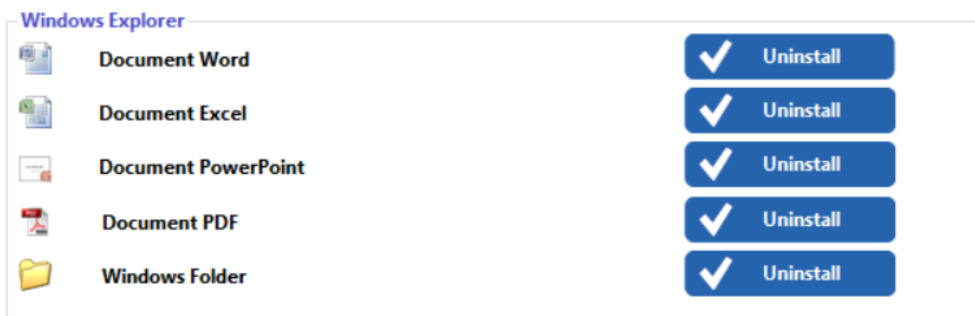
- [Installing Windows Explorer](#)
- [Installing Microsoft Excel](#)
- [Installing Microsoft Outlook](#)
- [Installing Microsoft PowerPoint](#)
- [Installing Microsoft Word](#)

Installing Windows Explorer

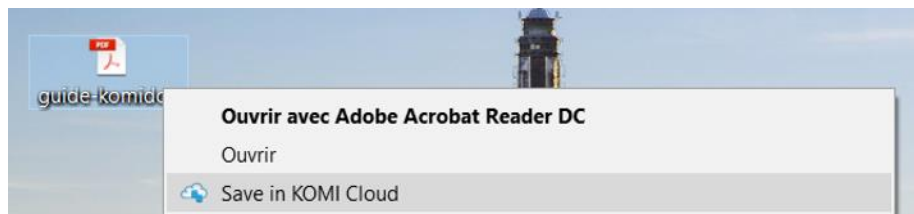
Click on the "**Install**" button to start installing the Windows Explorer add-ins for each document type (Microsoft Word, Microsoft Excel, Microsoft PowerPoint, PDF, Windows folders).



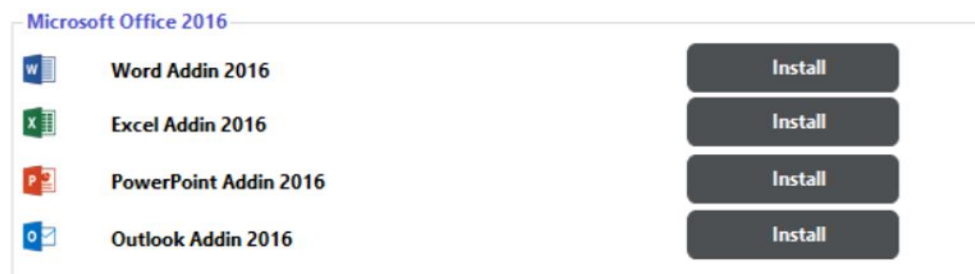
- When the add-ins are installed, the interface will be changed as follows:



Once the add-ins are installed, a new menu will appear when you right-click on a folder or in a file from Windows Explorer: « **Save in KOMI Doc** »



Installing Microsoft Excel

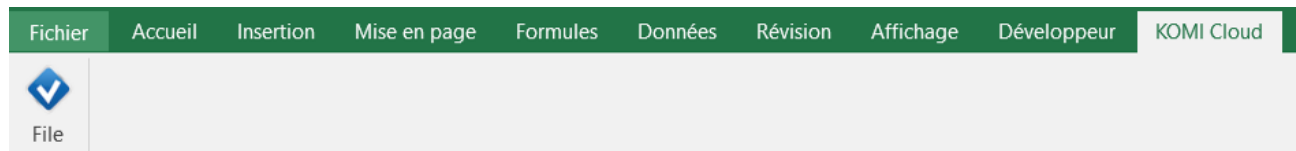


Click the « **Install** » button to begin installing the Microsoft Excel add in:

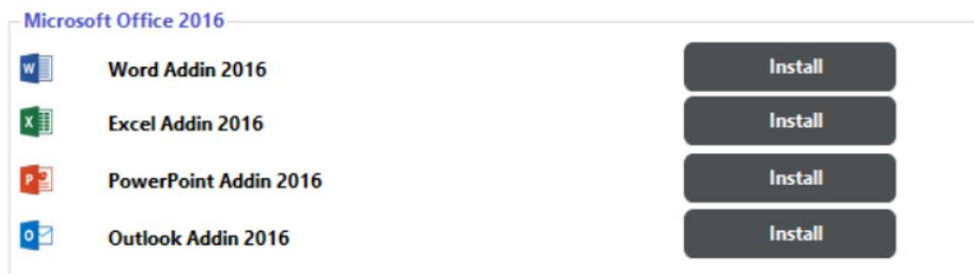


The bar at the bottom of the window indicates the progress of the installation of the plugin.

When the installation is complete, a new **KOMI Doc** tab will be added to Microsoft Excel. It contains a "**File**" button used to file a document in KOMI Doc.



Installing Microsoft Outlook

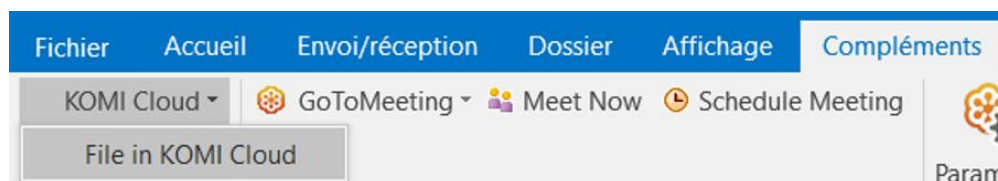


Click the « **Install** » button to begin installing the Microsoft Outlook add in:



The bar at the bottom of the window indicates the progress of the installation of the plugin.

When the installation is finished, a new **KOMI Doc** tab will be added to Microsoft Outlook. It contains a button « **Complements** » used to file a document in KOMI Doc.



A new « **KOMI Doc** » folder will be added to the mailbox if the version of your Microsoft Outlook is greater than 15.0.4420.1017 for Microsoft Outlook 2013, 14.0.7015.1000 for Microsoft Outlook 2010, 12.0.6680.5000 for Microsoft Outlook 2007.

Installing Microsoft PowerPoint

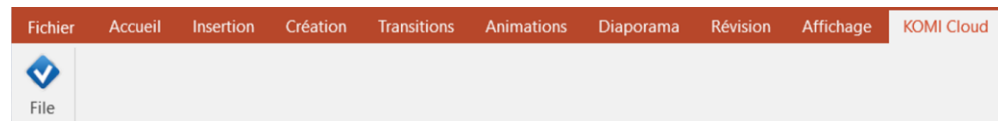


Click the « **Install** » button to begin installing the Microsoft PowerPoint add in:

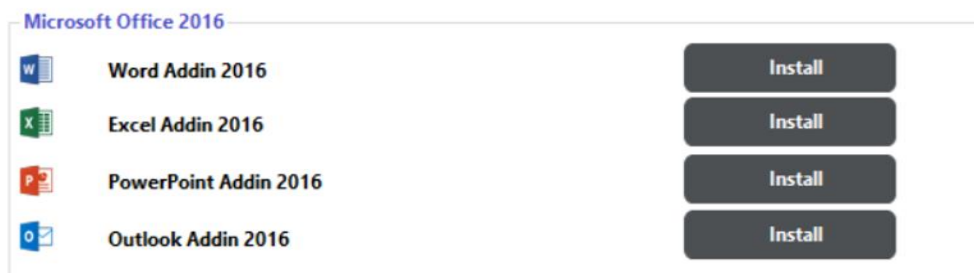


The bar at the bottom of the window indicates the progress of the installation of the plugin.

When the installation is complete, a new **KOMI Doc** tab will be added to Microsoft PowerPoint. It contains a "**File**" used to file a document in KOMI Doc.



Installing Microsoft Word

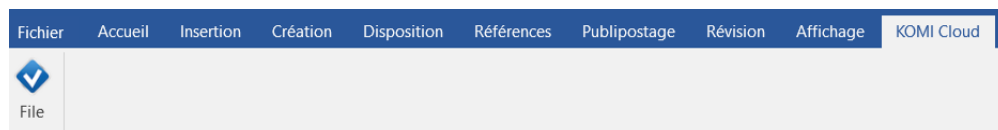


Click the « **Install** » button to begin installing the Microsoft Word add in:



The bar at the bottom of the window indicates the progress of the installation of the plugin.

When the installation is complete, a new **KOMI Doc** tab will be added to Microsoft Word. It contains a "**File**" used to file a document in KOMI Doc.

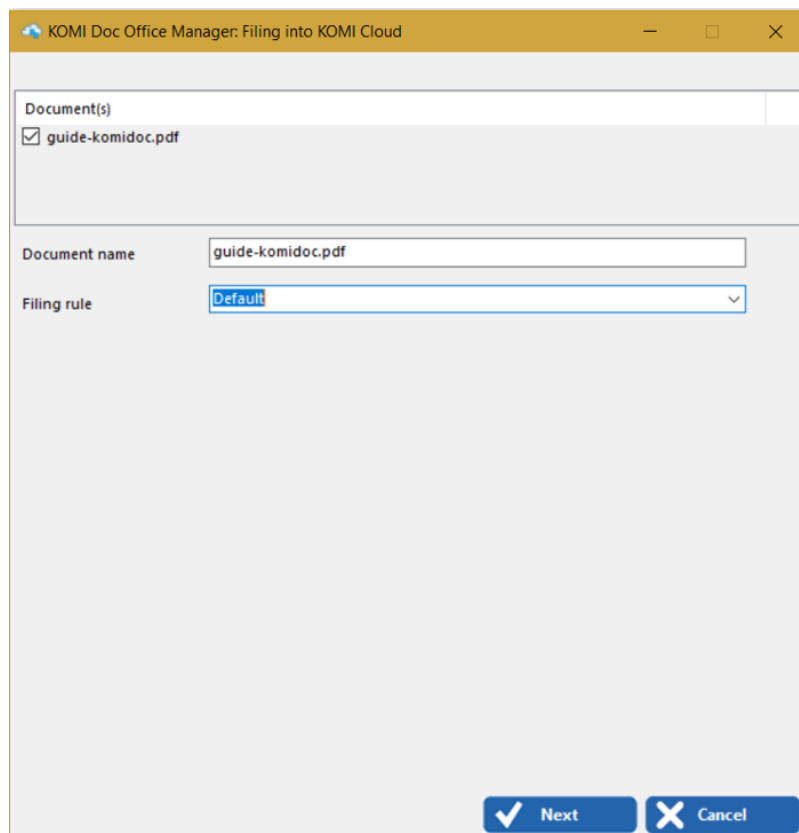


User guide

- [Using the "Filing into KOMI Doc" window](#)
- [Using advanced indexation](#)
- [Filing documents with Windows Explorer](#)
- [Filing Microsoft Word documents](#)
- [Filing Microsoft Excel documents](#)
- [Filing Microsoft PowerPoint documents](#)
- [Filing Microsoft Outlook documents](#)

Using the "Filing into KOMI Doc" window

When filing documents, KOMI Doc Office Manager displays a **"Filing into KOMI Doc »** window..



In this window, you can:

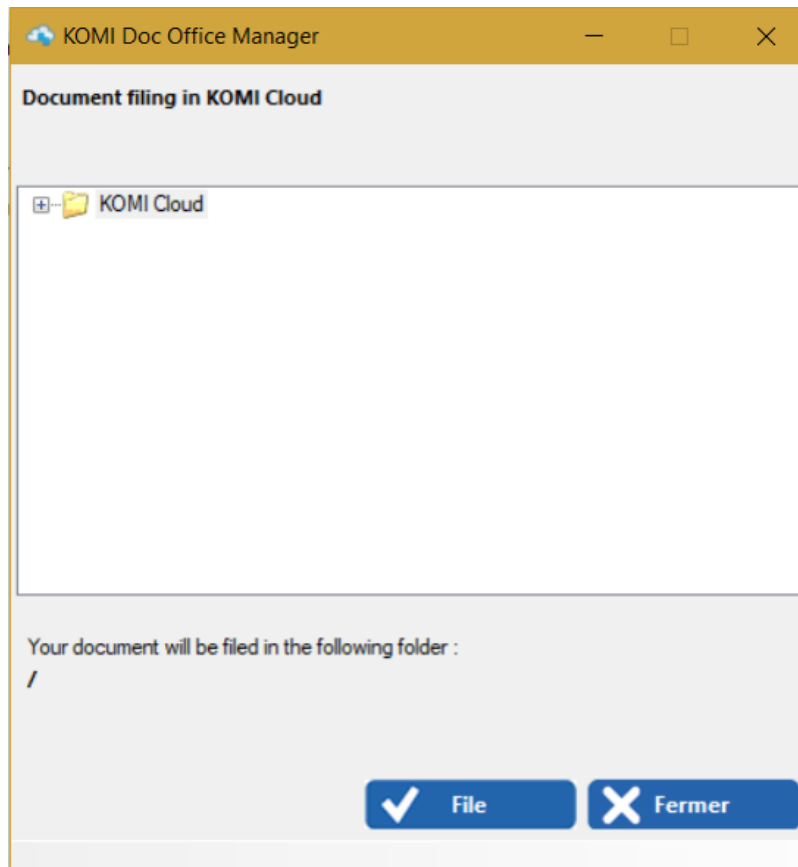
- Choose the indexation type (advanced or not) in the "**Filing rule**" section. If you click on "Default", you can close your document in the "Document Name" section.
- Choose another filing rule, in this case, return to the section "**Use Advanced indexing.**"

When you rename your file as you want, click on "**File**" to start processing the document filing in KOMI Doc.

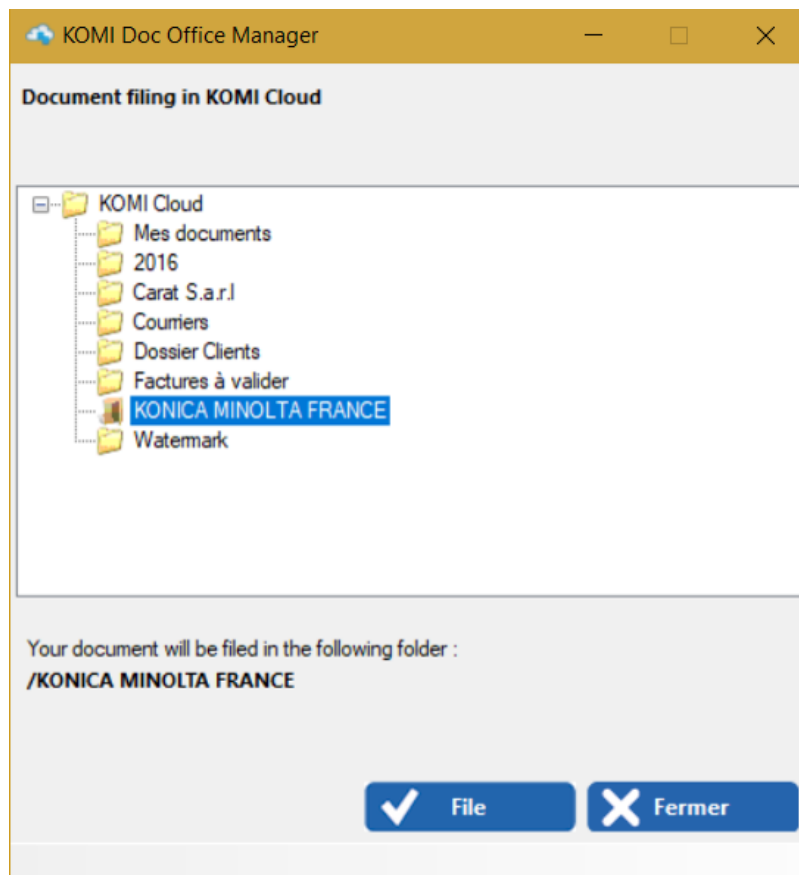
Click "**Cancel**" to cancel the filing and close the window.

The processing operation can take a few seconds, a progress bar inform you about the progress of the filing.

A window appears:



You must specify the folder where you want to categorize your document. For this, you can place the tree structure KOMI Doc by clicking the small "+" left of this folder.



Your document is now filed in the KOMI Doc tree.

A tooltip appears at the bottom of your screen in the taskbar to inform you of the result of your operation.



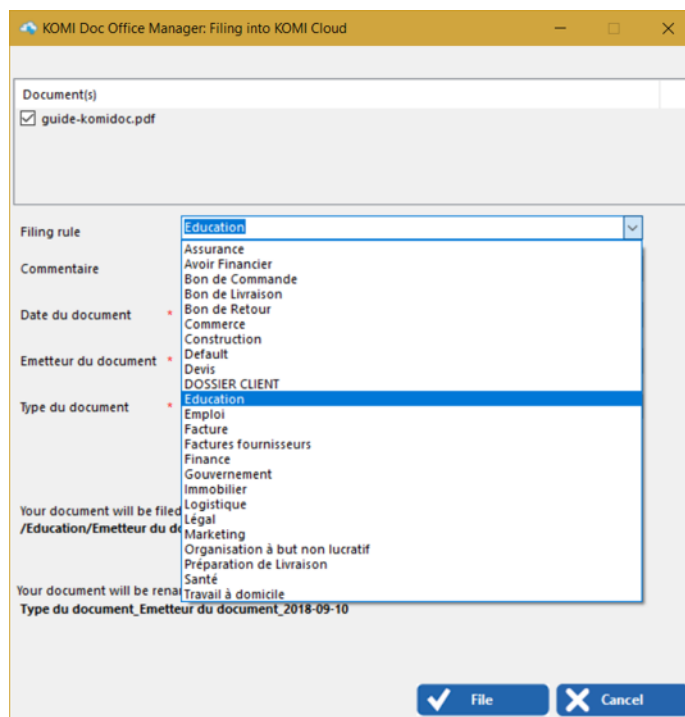
- *You cannot create an KOMI Doc directory from this window.. If you need to create a new directory, connect to your KOMI Doc using your browser.*
- KOMI Doc Office Manager by default file only the Microsoft Office documents and PDFs. If you want to archive other types of document, it must inform them in the KOMI Doc Office

Manager settings file. By default, this file is located in the following location: C:\Program Files\Microsoft Office\OfficeManager\Configuration\Preferences.xml

Using advanced indexation

With KOMI Doc Office Manager you can choose advanced indexation options when filing documents.

1. In the **"Filing rule"** dropdown menu select one of the filing rules of your KOMI Doc.



2. Once your filing rule selected, choose from the dropdown menu the **"Document Type"**:

KOMI Doc Office Manager: Filing into KOMI Cloud

Document(s)

☒ guide-komidoc.pdf

Filing rule: Education

Commentaire:

Date du document: ☒ 10/09/2018

Emetteur du document: John Daniel

Type du document: Guide étudiant

Your document will be filed in the following folder :
/Education/John Daniel/Guide étudiant/

Your document will be renamed as follows:
Guide étudiant_John Daniel_2018-09-10

☒ File ☐ Cancel

3. By default, in "**Document Date**" the date will be displayed

You can change it by clicking on the calendar tab and then select the desired date from the calendar that appears:

KOMI Doc Office Manager: Filing into KOMI Cloud

Document(s)

☒ guide-komidoc.pdf

Filing rule: Education

Commentaire:

Date du document: ☒ 10/09/2018

Emetteur du document:

Type du document:

septembre 2018

lun.	mar.	mer.	jeu.	ven.	sam.	dim.
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Aujourd'hui: 10/09/2018

Your document will be filed in the following folder :
/Education/Emetteur du document/Type du document/

Your document will be renamed as follows:
Type du document_Emetteur du document_2018-09-10

☒ File ☐ Cancel

4. If you want to comment on the document, enter it in the **"Comment"** section.

The screenshot shows a dialog box titled "KOMI Doc Office Manager: Filing into KOMI Cloud". It contains the following fields and options:

- Document(s)**: A list with one item, "guide-komidoc.pdf", which is checked.
- Filing rule**: A dropdown menu set to "Education".
- Commentaire**: A text input field containing "English guide".
- Date du document**: A date picker set to "10/09/2018".
- Emetteur du document**: A text input field containing "John Daniel".
- Type du document**: A dropdown menu set to "Guide étudiant".

Below the input fields, the following information is displayed:

Your document will be filed in the following folder :
/Education/John Daniel/Guide étudiant/

Your document will be renamed as follows:
Guide étudiant_John Daniel_2018-09-10

At the bottom right, there are two buttons: "File" (with a checkmark icon) and "Cancel" (with an X icon).

At the bottom of the window you will see:

- The access path where your document is filed in KOMI Doc.
- The name of your document to be automatically renamed when filing.

If you do not want your document to be automatically renamed when choosing a filing rule, change the settings directly in your KOMI Doc interface in the section « **Administration > Filing Rules** ». Choose the filing rule you want to edit by clicking on it. On your right, in the column **"Edit the filing rule"** uncheck the box to stop the automatic filing rule. Your documents will then not automatically be renamed for the filing rule that you selected.

5. Click on the tab **"File"** to proceed with the filing of your document.

6. A tooltip will appear at the bottom of your screen in the taskbar to inform you of the result of your operation.



KOMI Doc Office Manager

The document [Guide étudiant_J...]
has been successfully archived

KOMI Doc Office Manager

Your document is then filed successfully in your KOMI Doc.

When filing a document, KOMI Doc Office Manager communicates with KOMI Doc which sends back the list of documents types that it can process, with their associated index.

If you want to use the advanced indexing, KOMI Doc Office Manager will display the list of the rules. When you select the desired rule, a form appears with a list of indexes for this rule. These indexes are associated with the document and used during searches for documents in KOMI Doc.

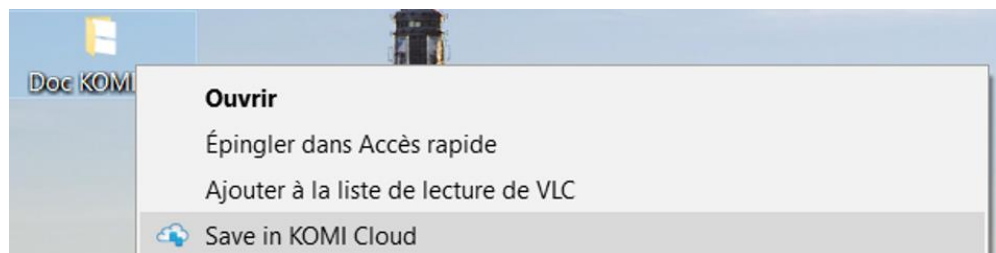
You will find these indexes in the document properties in your KOMI Doc interface.

If you do not want to use advanced indexation, your document will be saved under the "**Default**" type, as explained in the section: using the « **Filing into KOMI Doc** » window.

Filing documents with Windows Explorer

Filing a folder

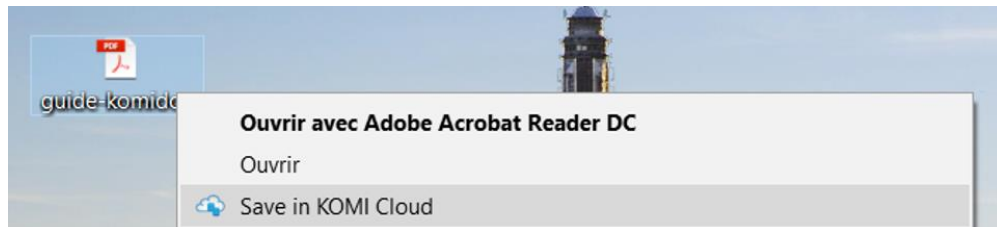
With this add-in, you can file all of the documents that exist in a Windows folder. Open the directory's contextual menu by right-clicking on it, and then click « **Save in KOMI Doc** ».



The "**Filing into KOMI Doc** » window appears. Refer to : **Using the « Filing into KOMI Doc »** window for more information on how the filing is processed.

Filing a document

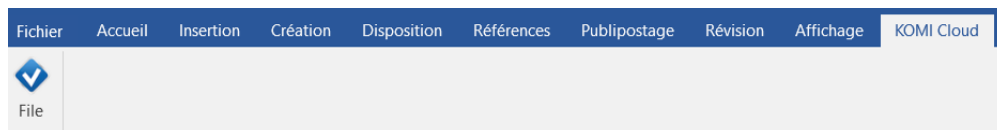
To file a PDF document, Microsoft Word document, a Microsoft Excel spread sheet or a Microsoft PowerPoint slideshow directly from Windows Explorer into KOMI Doc, just right-click on the document, and then click on "**Save in KOMI Doc**".



The "**Filing into KOMI Doc**" window appears. Refer to : Using the « **Filing into KOMI Doc** » window for more information on how the filing is processed.

Filing Microsoft Word documents

To file a Microsoft Word document in KOMI Doc open the [Konica Minolta](#) tab, and then click the "**File**" button.



The « **Filing into KOMI Doc** » window appears. Refer to : « **Using the filing into KOMI Doc window** » for more information on how the filing is processed.

Filing Microsoft Excel documents

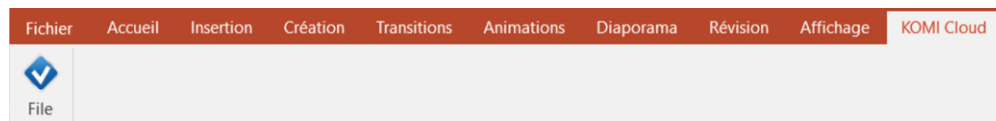
To file a Microsoft Excel document in KOMI Doc, open the [Konica Minolta](#) tab, and then click the "**File**" button.



The "**Filing into KOMI Doc** » window appears. Refer to « **Filing into KOMI Doc window** » for more information on how the filing is processed.

Filing Microsoft PowerPoint documents

To file a Microsoft PowerPoint document in KOMI Doc, open the [Konica Minolta](#) tab, and then click the "**File**" button.



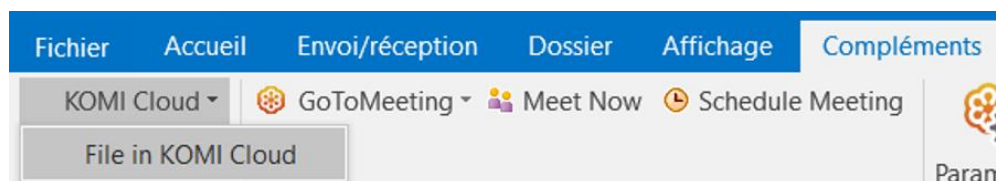
The "**Filing into KOMI Doc** » window appears. Refer to : **Using the « Filing into KOMI Doc window** » for more information on how the filing is processed.

Filing Microsoft Outlook documents

This add-in lets you file and index e-mails and attachments in KOMI Doc directly from Microsoft Outlook.

To file one or more emails, just select the email(s) you want to file. Click on « **Complements** » in the taskbar and then click on « **KOMI Doc** ».

A drop down menu appears, select « **File in KOMI Doc** » as shown below :



The window « **Filing in KOMI Doc** » appears. It includes specific features of Microsoft Outlook:

KOMI Doc Office Manager: Filing into KOMI Cloud

Email heading

+ [x] Plateforme E-learning

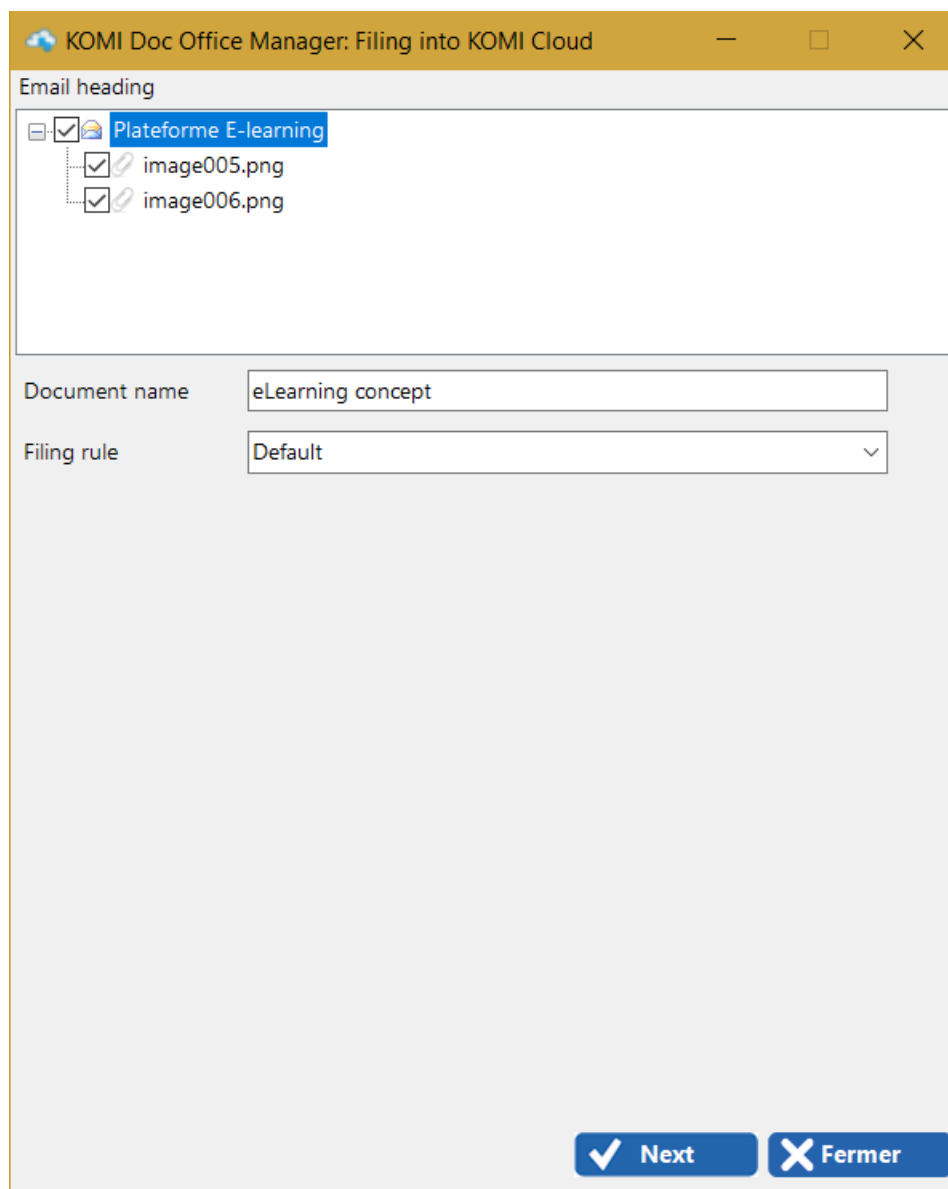
Document name

Filing rule

✓ Next X Fermer




You can rename the title of the email in « **Name of the document** » when there is only one email.

In this window, you can select the emails and attachments to be filed using the checkboxes; If you click the "+" symbol, all attachments in your email are displayed:



KOMI Doc Office Manager: Filing into KOMI Cloud

Email heading

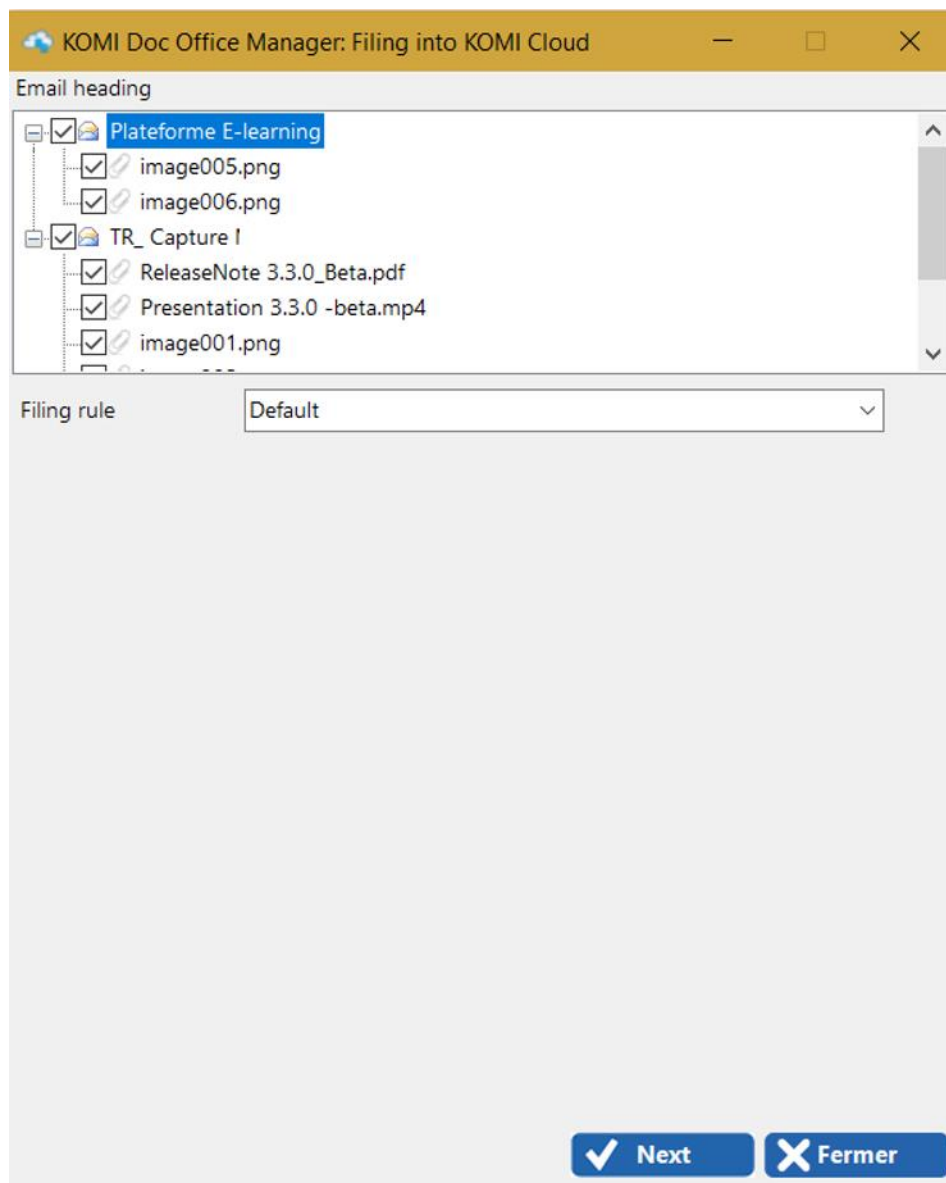
- ☒  Plateforme E-learning
 - ☒  image005.png
 - ☒  image006.png

Document name

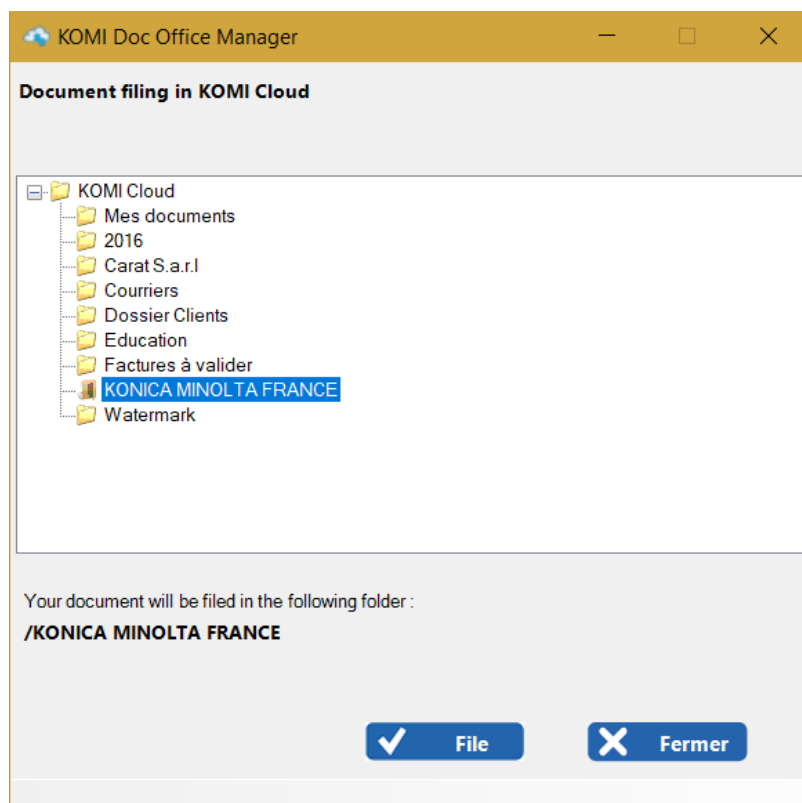
Filing rule

☒ Next ☐ Fermer

If you have selected two mails, the window will be presented in this way:



Click "**Next**" to continue archiving. This window opens:



Select an KOMI Doc directory to file your email and its attachments. Once the directory selected, click on « **File** ». A tooltip will appear at the bottom of your screen in the taskbar to inform you of the result of your operation.

The mails are filed in PDF text format and the attachments in their original formats.

During filing, KOMI Doc Office Manager create an KOMI Doc directory holding the title of email and in which it will archive the email and PDF attachments in their native format.

If you select only one attachment, KOMI Doc Office Manager will not create a directory and will file the document in the file KOMI Doc selected from the Microsoft Outlook folders list.

✓ If needed, you can refresh the KOMI Doc tree via the Outlook menu « **Complements > KOMI Doc > Refresh KOMI Doc** ».

KOMI Doc Office Manager files only emails. You can not archive other Microsoft Outlook items such as meeting requests, appointments or tasks.