

Ver 2.0 2015 October 6



Cloud Shared Office  
**ECM**

**Simple Setup Guide for Beginner's**



Cloud Shared Office

# Table of Contents

1 In the Beginning .....	3
2 Initial Setup .....	3
2.1 Organization Basic Information.....	4
2.2 Departments/Positions Settings.....	5
2.3 Disk Capacity Setting .....	6
2.4 Delivery settings.....	10
2.5 Register Users ~Manual Registration~ .....	11
2.6 Register Groups.....	13
2.7 Register Users ~Batch Import~ .....	15
2.8 Application Management Settings (Profile) .....	16
2.9 Access Authorization to Files and Spaces Settings (Role).....	19
2.10 Check the usage.....	21
2.11 Password Policy Settings .....	22
2.12 IP Address Restriction Settings .....	22
2.13 Contents Update Notification Settings.....	23
3 In the End.....	27

## 1 In the Beginning

First of all, let's clarify the purpose for importing CSO ECM. We recommend that you clearly document your company's manual in advance. For example:

- What kind of files will be stored?
- With whom will the files be shared with?
- In what operations will this service be used?
- Where will this service be used?

Things like the above samples are to be decided as minimum requirement for your operational design. For this purpose, please establish your goal in detail. For example:

- Speed up information sharing with file sharing
- Cut cost with progressed efficiency
- Increase productivity in various processes

However, it is not necessary to list all goals in detail. You may also decide your goals while setting up CSO ECM.

## 2 Initial Setup

When importing CSO ECM, it is necessary to configure the following settings first.

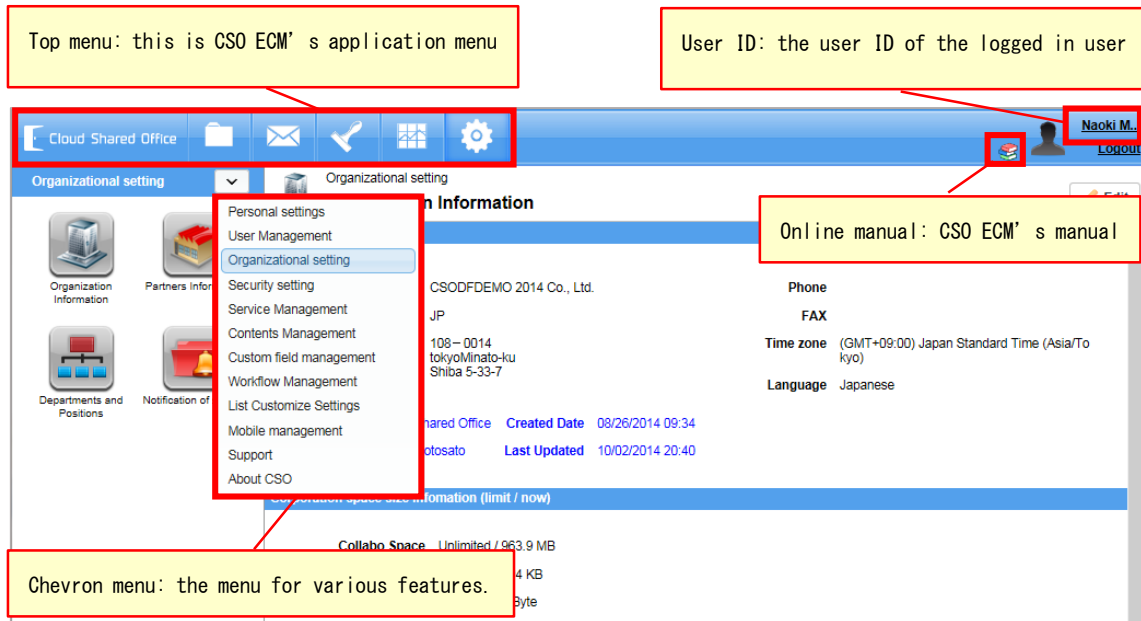
- Organization's basic information
  - ✓ Register organization name, departments, positions, and users that use CSO ECM.
  - ✓ Register the basic information of organization such as company name, address, telephone number, etc.
  - ✓ Decide whether to set a limit on stored files for organization.
  - ✓ Create a department/position system for organization.
  - ✓ Set a maximum threshold for each space, and set up the e-mail address for notification when the maximum capacity is reached.
- Authorization settings
  - ✓ Customize the authorizations and profiles for usage of features in CSO ECM.
  - ✓ Customize the authorizations and roles for editing files stored in CSO ECM.
- Import users
  - ✓ First of all, let's manual register users and understand the required items for user registration.
  - ✓ Register users by using importing data in CSV format.

# ECM Simple Setup Guide

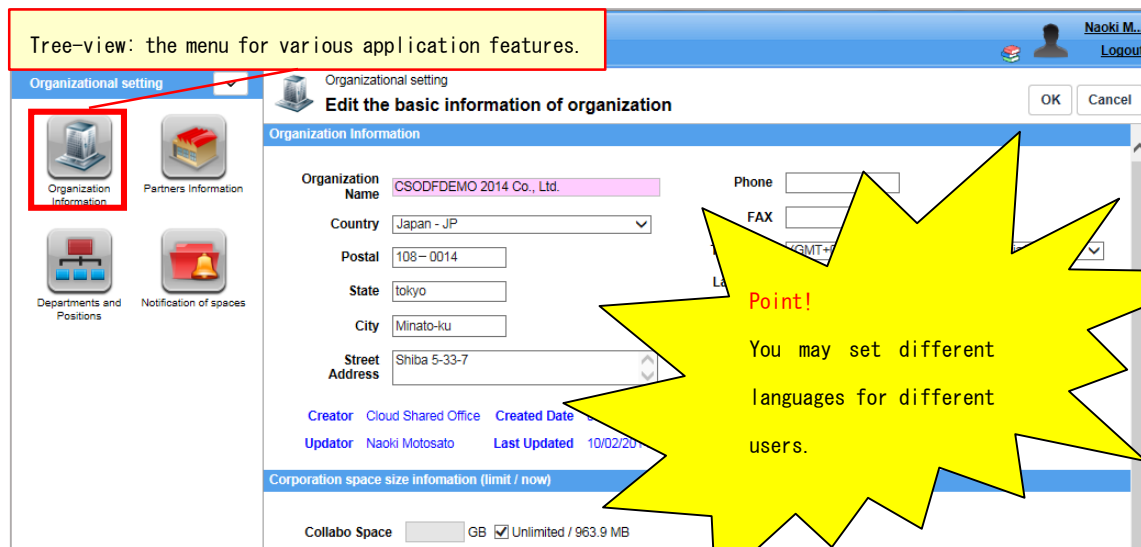
- ❑ Security settings
- ✓ Confirm and setup your password policy according to your company's ISMS standard.
- ✓ If you wish to restrict usable network, configure IP address restrictions.

## 2.1 Organization Basic Information

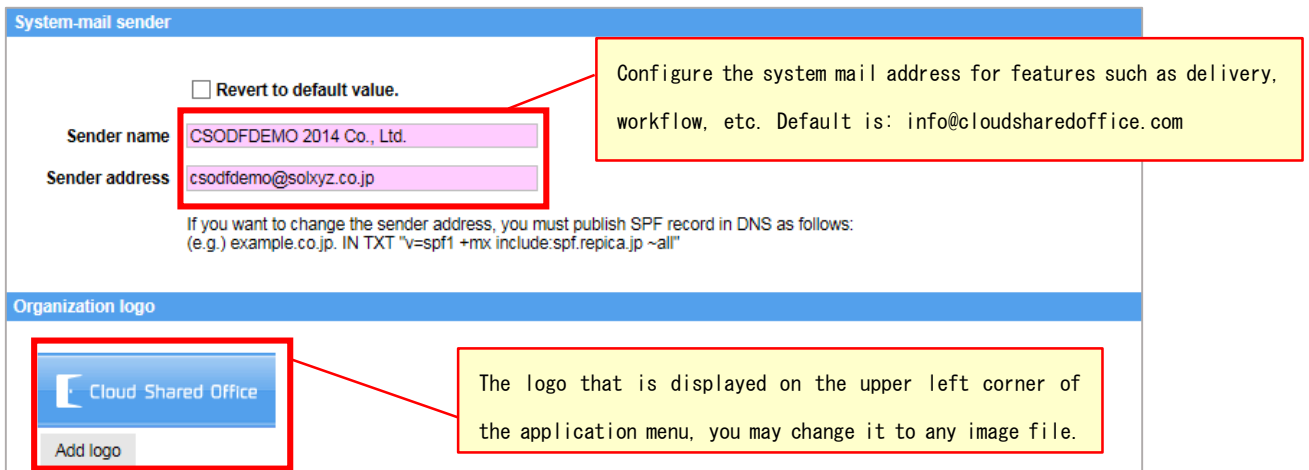
First of all, let's correctly insert organization, i.e., your company information.



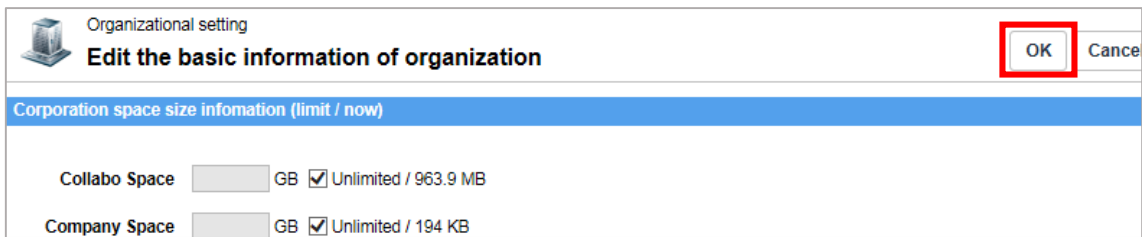
From the application menu select "Configuration", then select "Organizational setting".



Select "Organization Information", then edit your organization name, address, phone number, and language.



After configuring your organization’s basic information, let’s configure your “System-mail sender”, and “Organization logo”.

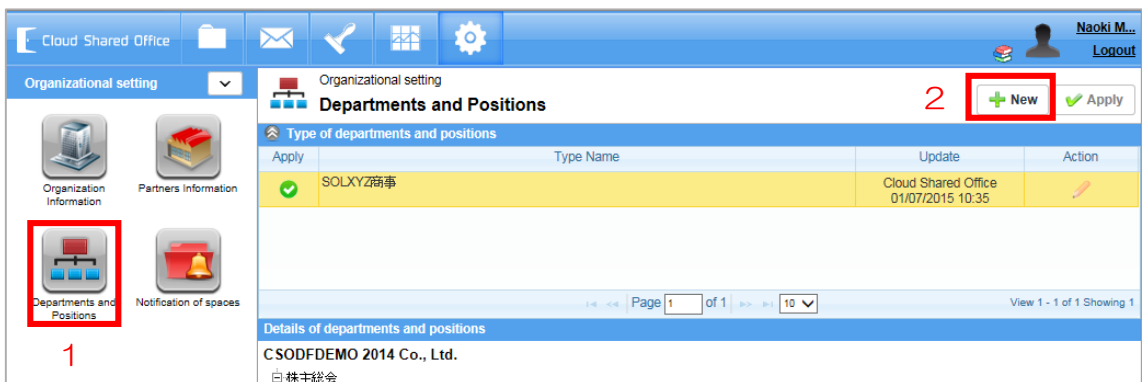


After inserting all necessary information, click the “OK” button to save.

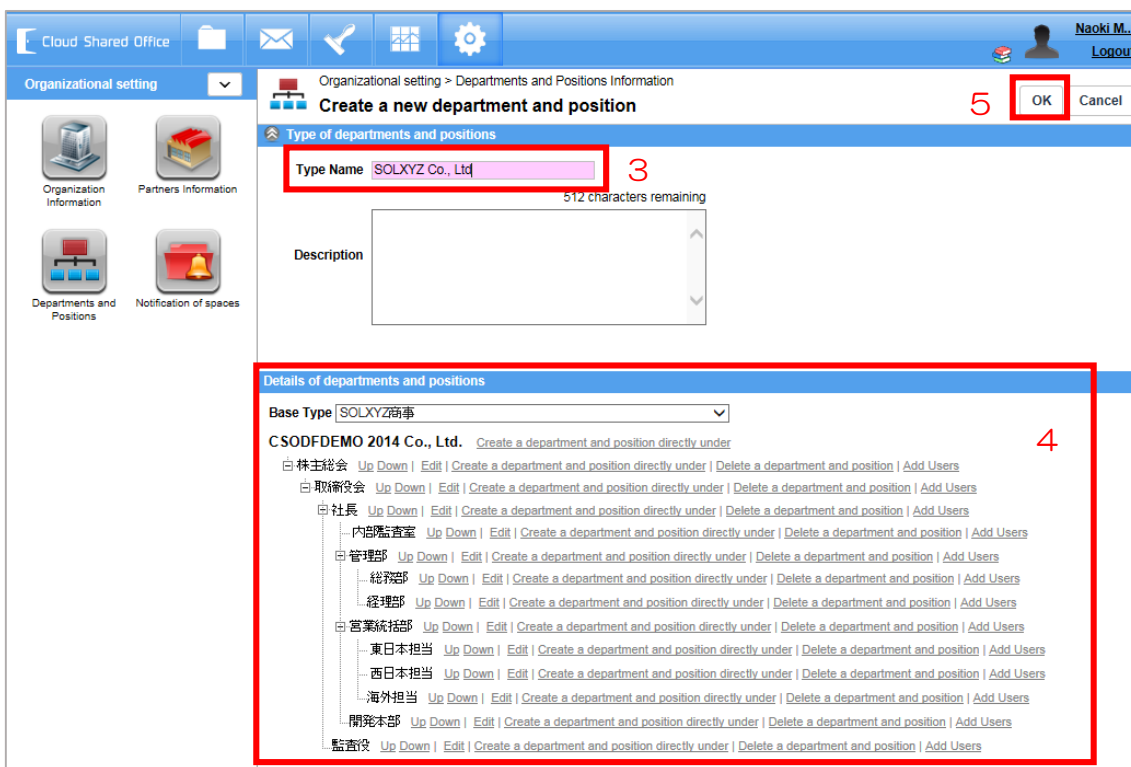
## 2.2 Departments/Positions Settings

This section introduces how to setup “Departments/Positions” according to your organization’s system.

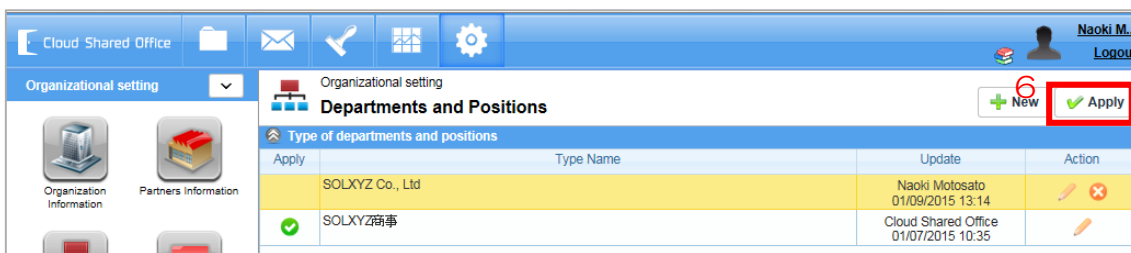
Select “Configuration” from the application menu, select “Organizational settings” from the chevron menu.



Select “Departments and Positions” from the tree-view, click the “New” button to create a new departments/positions type.



After entering a type name, create your department/position along the company system. Registering users to departments and positions are to be done after the departments/positions system is finished. When you have finished creating the system, click “OK” button to save.



Upon finishing, click the “Apply” button to apply the system to your organization.

## 2.3 Disk Capacity Setting

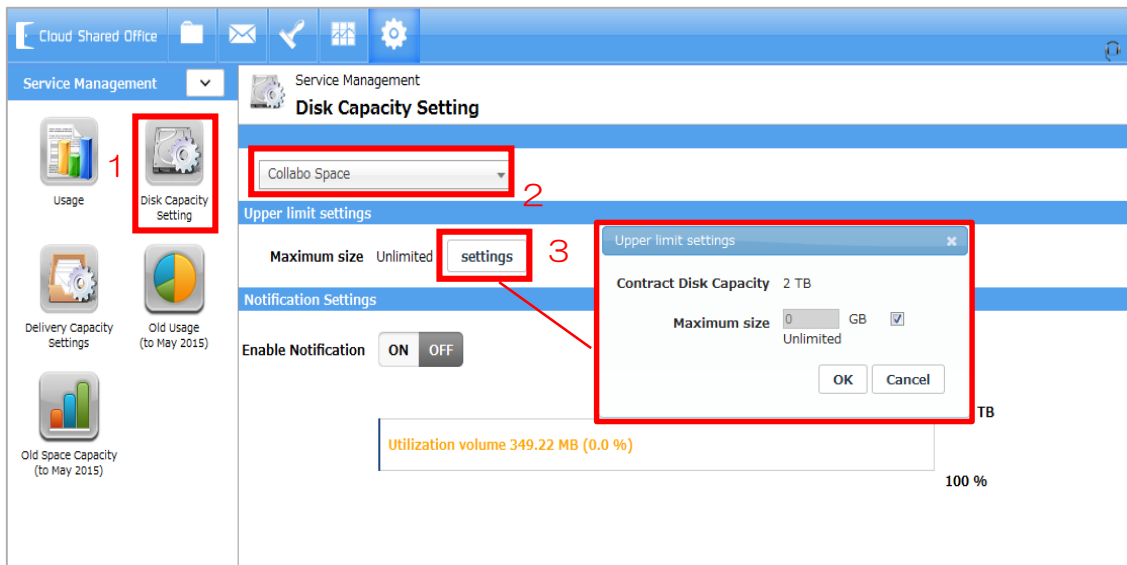
### 1) Disk Capacity Setting

By setting a threshold to your organization’s storage capacity, notification e-mails can be sent to administrators when the threshold is reached.

Select “Configuration” from the application menu, select “Service Management” from the chevron menu.

Select “Disk Capacity Setting” from the tree-view.

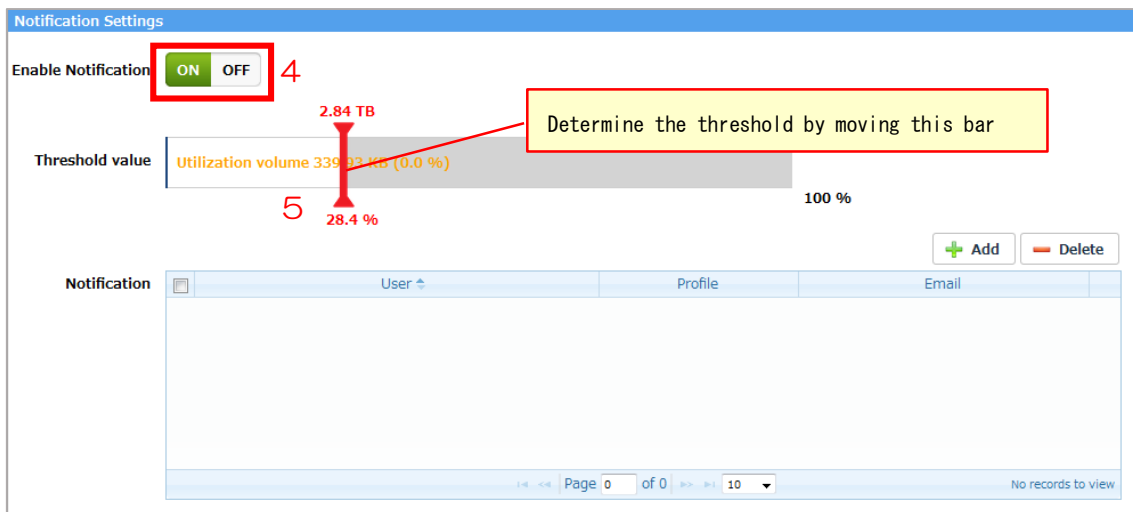
## ECM Simple Setup Guide



First, choose a space (My Space/Collabo Space/Company Space/Archive) that you would like to set an upper limit on the disk capacity.

Then click the "settings" button to set an upper limit.

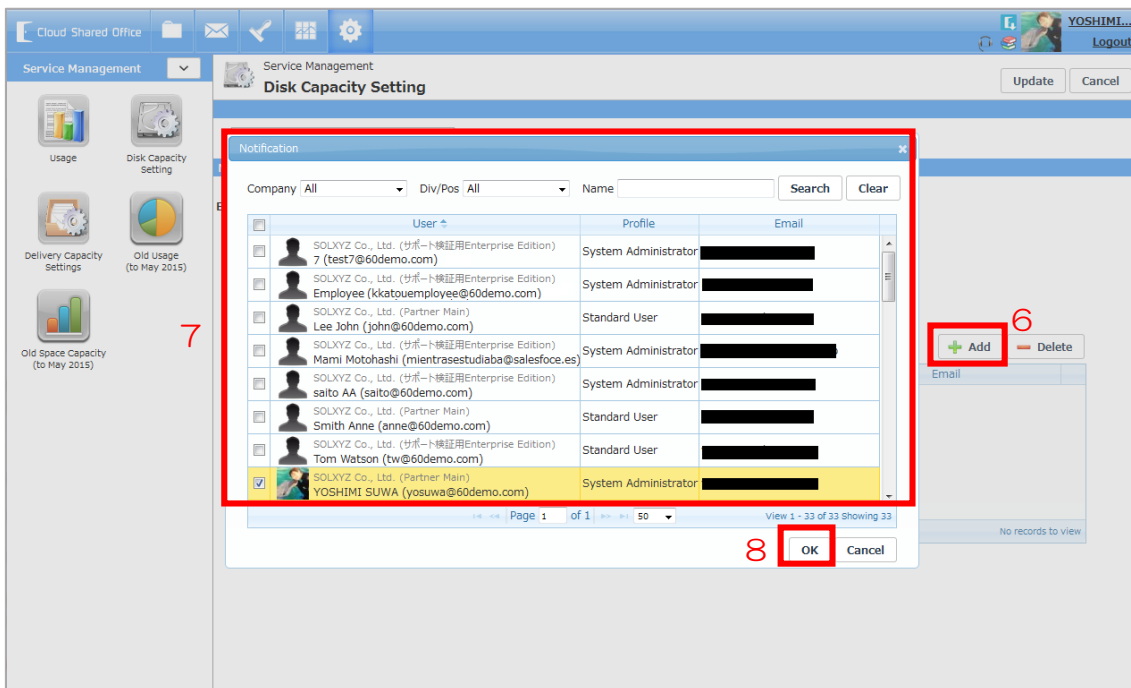
Next, set the "Notification Settings".



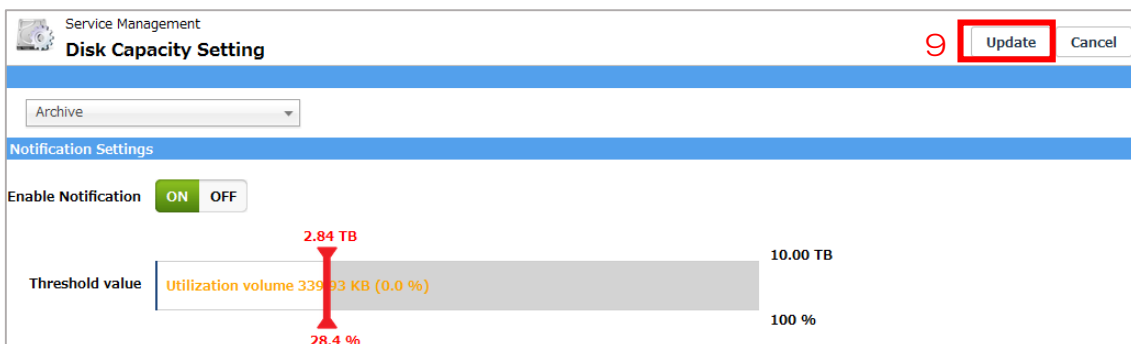
By turning [Enable Notification] ON, notification email will be sent to the notification destination when the disk usage of a space has reached the threshold.

Determine the threshold for the contract capacity by moving the red bar from side to side.

# ECM Simple Setup Guide



Click the “Add” button and select the users you wish notify when the threshold is reached, then click the “OK” button.



After configuring a space, click the “Update” button to save your configuration. Notification settings can also be configured for other spaces by following the same instructions.

- **Caution:** Please be aware that without setting a maximum limit to the organization space, unlimited files can be stored. When the stored volume exceeds your contracted capacity, excess charges will be charged.

## 2) Delivery Capacity Settings

Select “Configuration” from the application menu, select “Service Management” from the



## ECM Simple Setup Guide

chevron menu.

Select “Delivery Capacity Settings” from the tree-view.

1

2

3

Determine the threshold by moving this bar

741.00 GB

2.00 TB

Utilization volume 0.00 Byte (0.0%)

100 %

36.2 %

Notification	User	Profile	Email
--------------	------	---------	-------

+ Add - Delete

Page 0 of 0

By turning [Enable Notification] ON, notification email will be sent to the notification destination when the delivery usage of the entire organization has reached the threshold. Determine the threshold by moving the red bar from side to side.

4

5

6

User	Profile	Email
SOLXYZ Co., Ltd. (サボ-ト棟証用Enterprise Edition) 7 (test7@60demo.com)	System Administrator	[Redacted]
SOLXYZ Co., Ltd. (サボ-ト棟証用Enterprise Edition) Employee (kkatouemployee@60demo.com)	System Administrator	[Redacted]
SOLXYZ Co., Ltd. (Partner Main) Lee John (john@60demo.com)	Standard User	[Redacted]
SOLXYZ Co., Ltd. (サボ-ト棟証用Enterprise Edition) Mami Motohashi (mientrasestudiaba@salesfoce.es)	System Administrator	[Redacted]
SOLXYZ Co., Ltd. (サボ-ト棟証用Enterprise Edition) saito AA (saito@60demo.com)	System Administrator	[Redacted]
SOLXYZ Co., Ltd. (Partner Main) Smith Anne (anne@60demo.com)	Standard User	[Redacted]
SOLXYZ Co., Ltd. (サボ-ト棟証用Enterprise Edition) Tom Watson (tw@60demo.com)	Standard User	[Redacted]
SOLXYZ Co., Ltd. (Partner Main) YOSHIMI SUWA (yosuwa@60demo.com)	System Administrator	[Redacted]

+ Add - Delete

Page 1 of 1

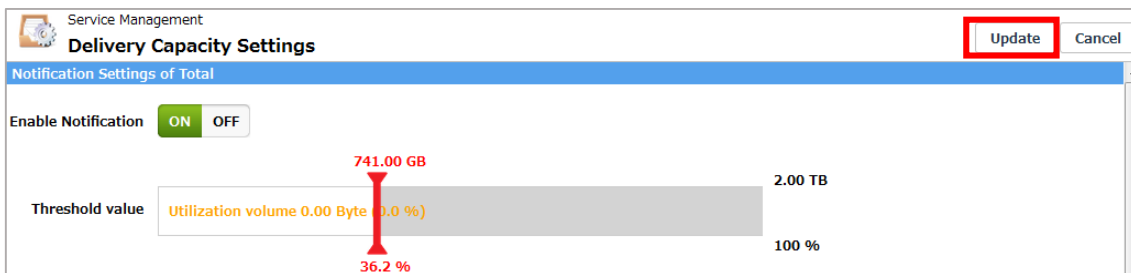
View 1 - 33 of 33 Showing 33

Click the “Add” button and select the users you wish notify when the threshold is reached, then click the “OK” button.

Set the threshold and notification destination of delivery usage for each user in the same way.



In the "Notification Settings for each user", enter the threshold directly. Specify the notification for each person or other notification destination.



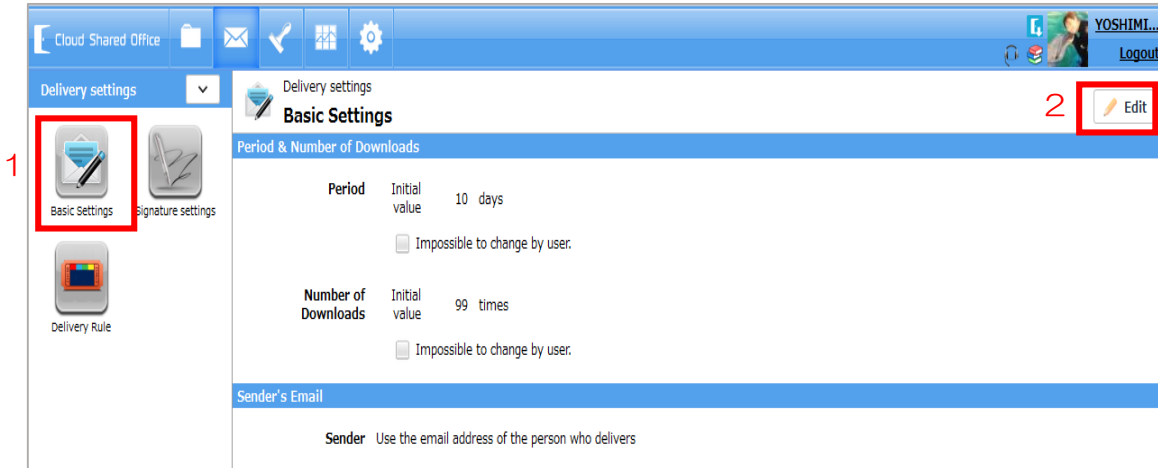
After configuring the notification settings, click the “Update” button to save your configuration.

### 2.4 Delivery settings

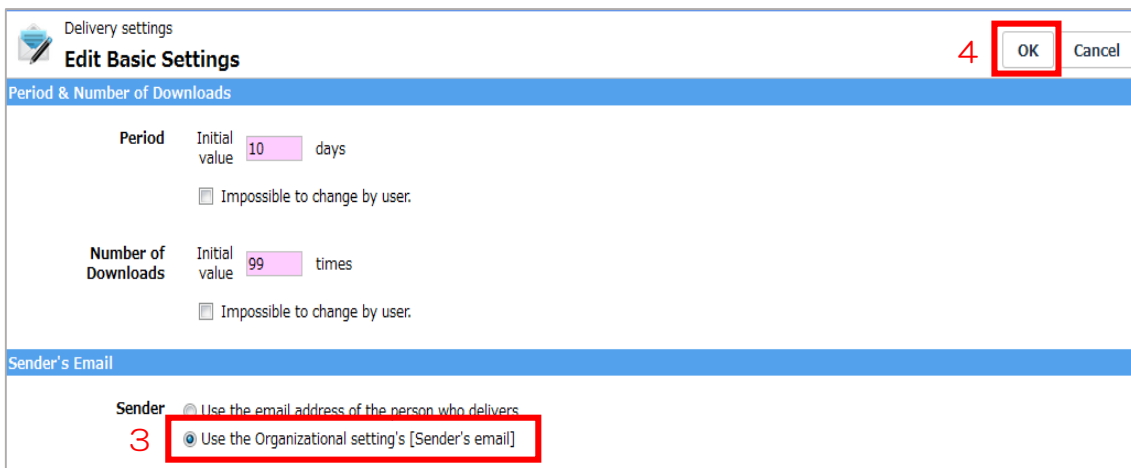
Regarding to "Sender's Email address", you make a choice between the organization settings and the e-mail address of the person who delivers.

- 1) Use the e-mail address of the person who delivers.  
 Since the default setting has been set to use the e-mail address of the person who delivers, it do not have to do anything.
  
- 2) Use the organization settings  
 Check if the "Sender name" and "Sender address" have been set in "Configuration >> Organization setting >> Organization Information" menu.  
 For more details, refer to "2.1 Organization Basic Information".

Select “Delivery” from the application menu, select “Delivery settings” from the chevron menu.



Select “Basic settings” from the tree-view, click the “Edit” button.



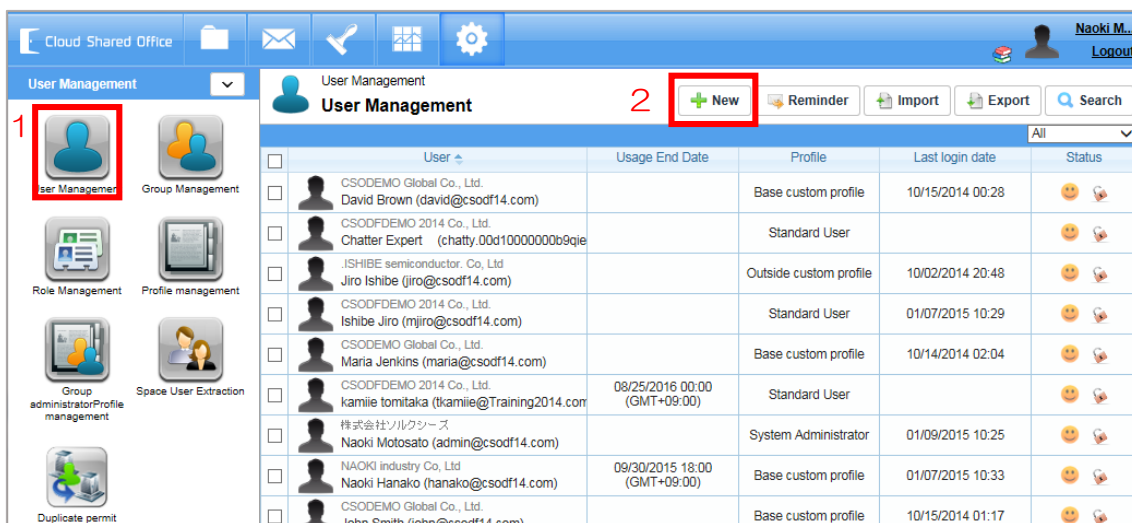
Select the "Use the Organizational setting's [Sender's email]", then click the "OK" button.

## 2.5 Register Users ~Manual Registration~

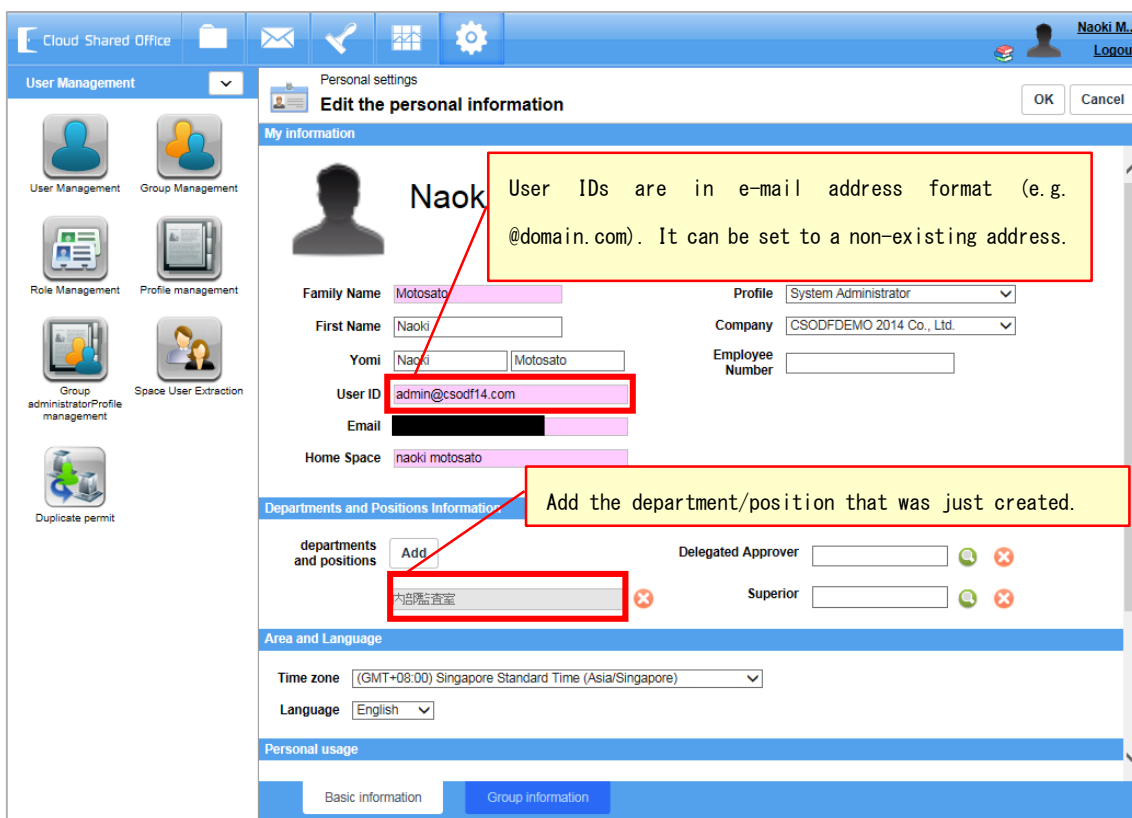
This section introduces how to add user IDs for those that uses CSO ECM.

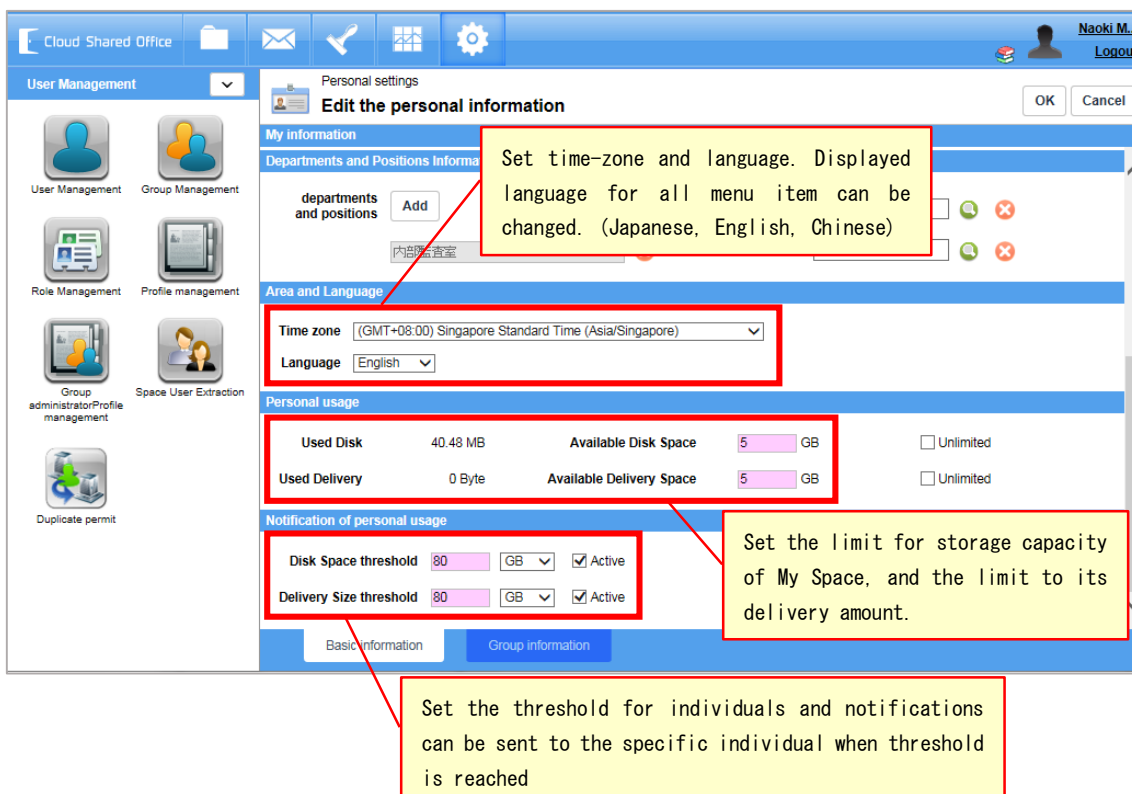
Select “Configuration” from the application menu, select “User Management” from the chevron menu.

# ECM Simple Setup Guide



Select “User Management” from the tree-view, then click the “New” button.





Fill out the below items and click the “OK” button.

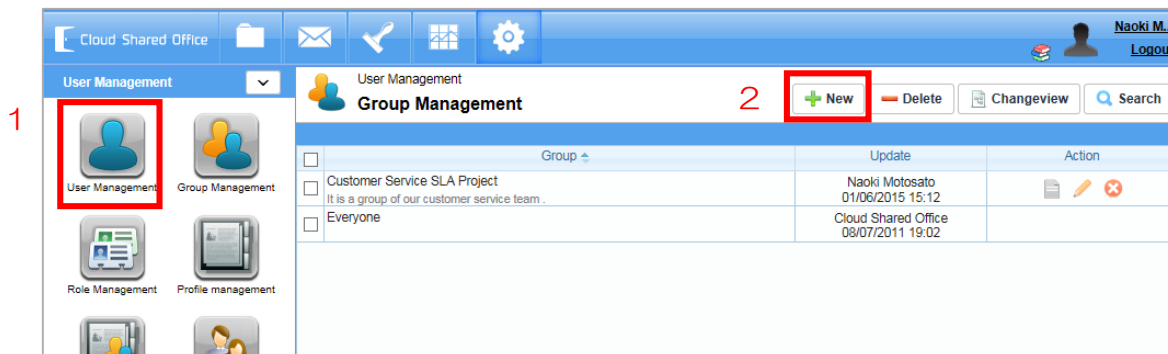
※ The items in red must be filled out.

- Family Name
- First Name
- User ID (in e-mail address format)
- Email address
- Home Space (The name of the highest directory under My Space)
- Profile (The steps to customize profiles will be introduced later in this guide)
- Departments and Positions
- Delegated Approver
- Superior
- Time Zone
- Language
- Available Disk Space
- Available Delivery Space

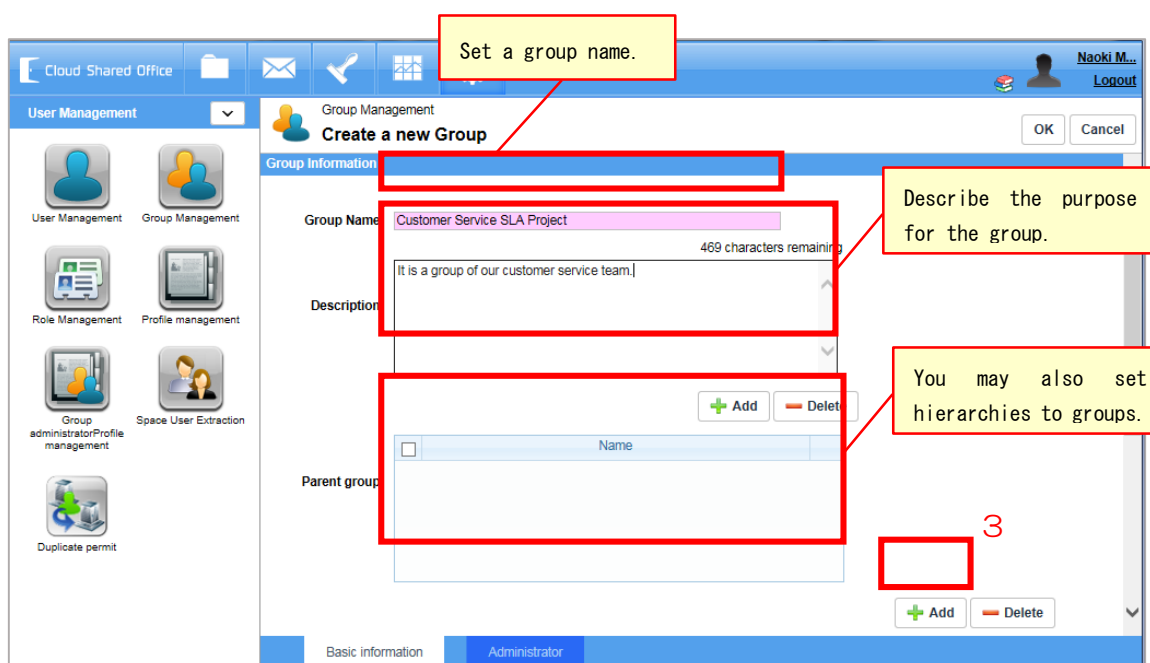
## 2.6 Register Groups

In CSO ECM, apart from departments and positions, you may also create groups that includes multiple users for your projects, sales teams or support teams, etc.

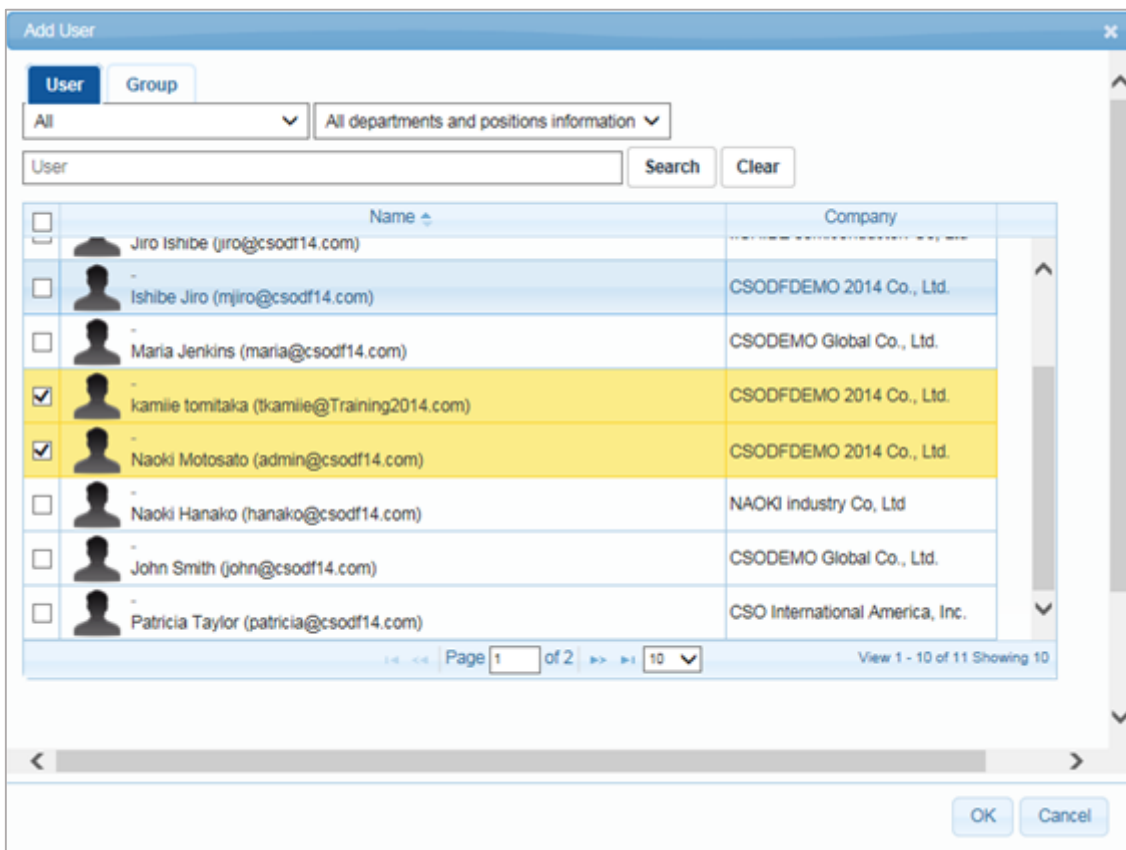
Select “Configuration” from the application menu, then select “User Management” from the chevron menu.



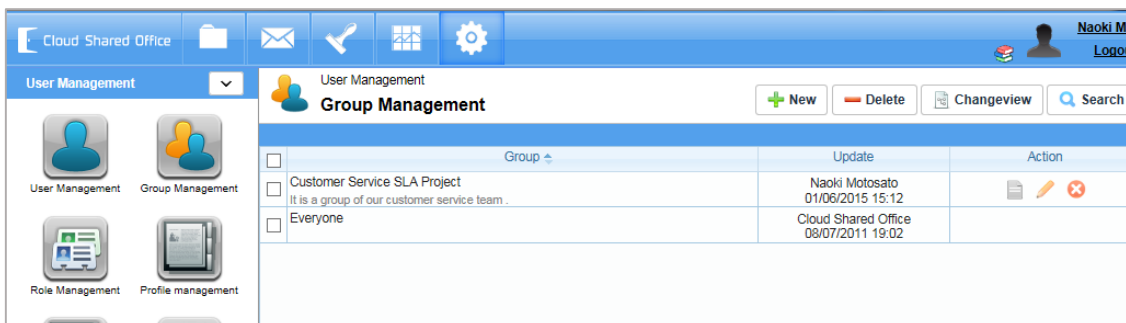
Select “Group Management” from the tree-view, then click the “New” button.



To add users to this group, click the “Add” button.



Search for and select the users you wish to add to this group, then click the “OK” button.

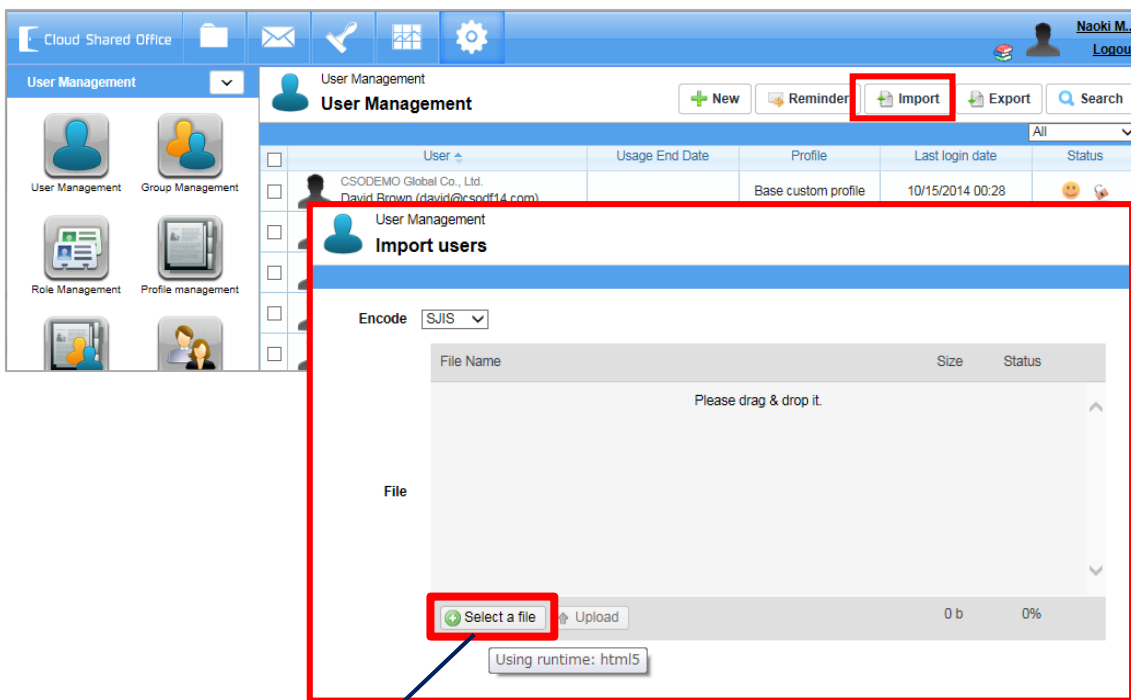


Finally confirm that your created group has been registered.

### 2.7 Register Users ~Batch Import~

This section introduces how to add user IDs for multiple users who use CSO ECM.

Select “Configuration” from the application menu, select “User Management” from the chevron menu.



You can check the the format of csv file to import by exporting user info.

Create CSV data like the below sample and batch import user information. Note that the “Disk Space” for users are there storage space size in My Space.

lastname	firstname	lastname_kana	firstname_kana	userid	mail	homespace	profile
Motosato	Naoki	Naoki	Motosato	admin@csodf14.com	mnaoki@solxyz.co.jp	naoki motosato	System Administra
Brown	David			david@csodf14.com	yosuwa@solxyz.co.jp	david	Base custom profi
Naoki	Hanako			hanako@csodf14.com	yosuwa@solxyz.co.jp	hanako	Base custom profi
Ishibe	Jiro			im@csodf14.com	yosuwa@solxyz.co.jp	im	Outside custom pr
Smith	John						
Williams	Linda						
Jenkins	Maria						
Ishibe	Jiro						
Taylor	Patricia						
Kamita	tomitaka						

User Management **Import** Cancel Run

Contents

All	11
Create	8
Update	1
Fail	3

Detail

Categori	Username	User ID	Profile	Enable	Remarks
Fail	New User	aaa	Standard User	Valid	User ID is illegal.
Create	Motosato Naoki	admin@csodf14.coma	System Administrator	Valid	
Create	Brown David	david@csodf14.coma	Base custom profile	Valid	
Fail	Naoki Hanako	hanako@csodf14.coma	Base custom profile	Valid	active_start_date is illegal.

Confirm that the import was successful, and click the “Run” button.

※In case of failure, click on the number of failures to see further information.

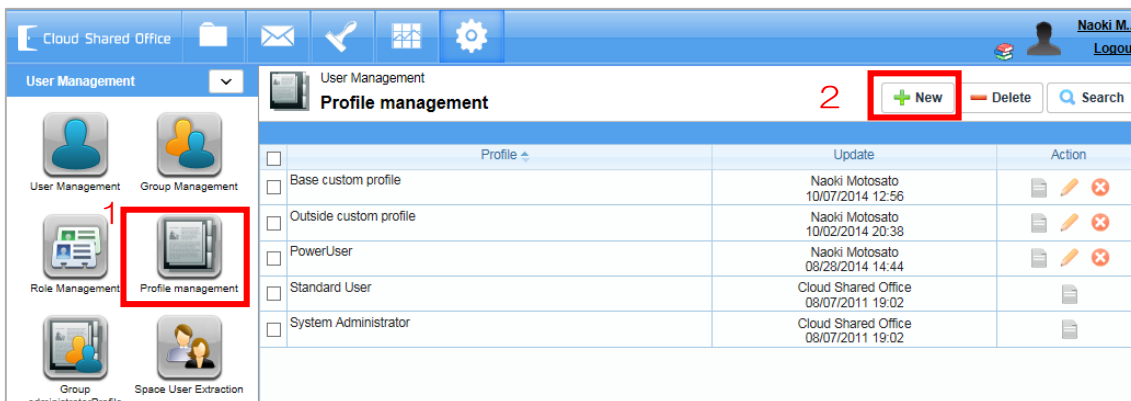
### 2.8 Application Management Settings (Profile)

In CSO ECM, you may customize the authorization to features and displays for each



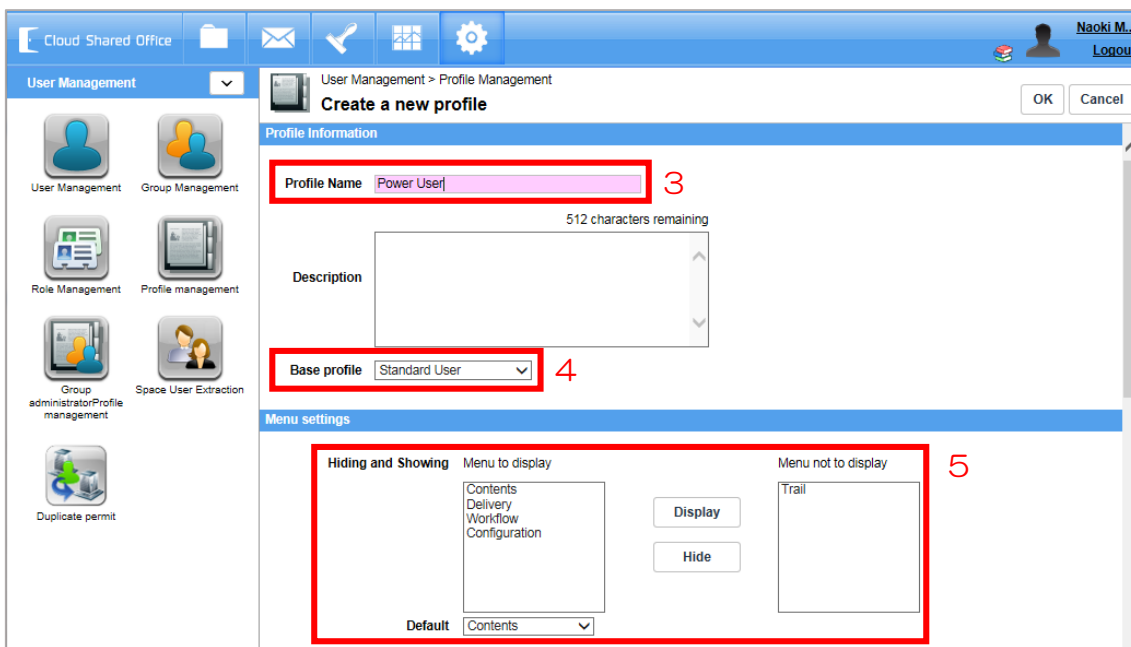
user. This kind of authorization in application management is called Profile in CSO ECM. The steps for customizing profiles are introduced in this section.

Select “Configuration” from the application menu, then select “User Management” from the chevron menu.



Select “Profile Management” from the tree-view, and click the “New” button.

※ Please be noted that “System Administrator” and “Standard User” are default profiles and cannot be edited or deleted.

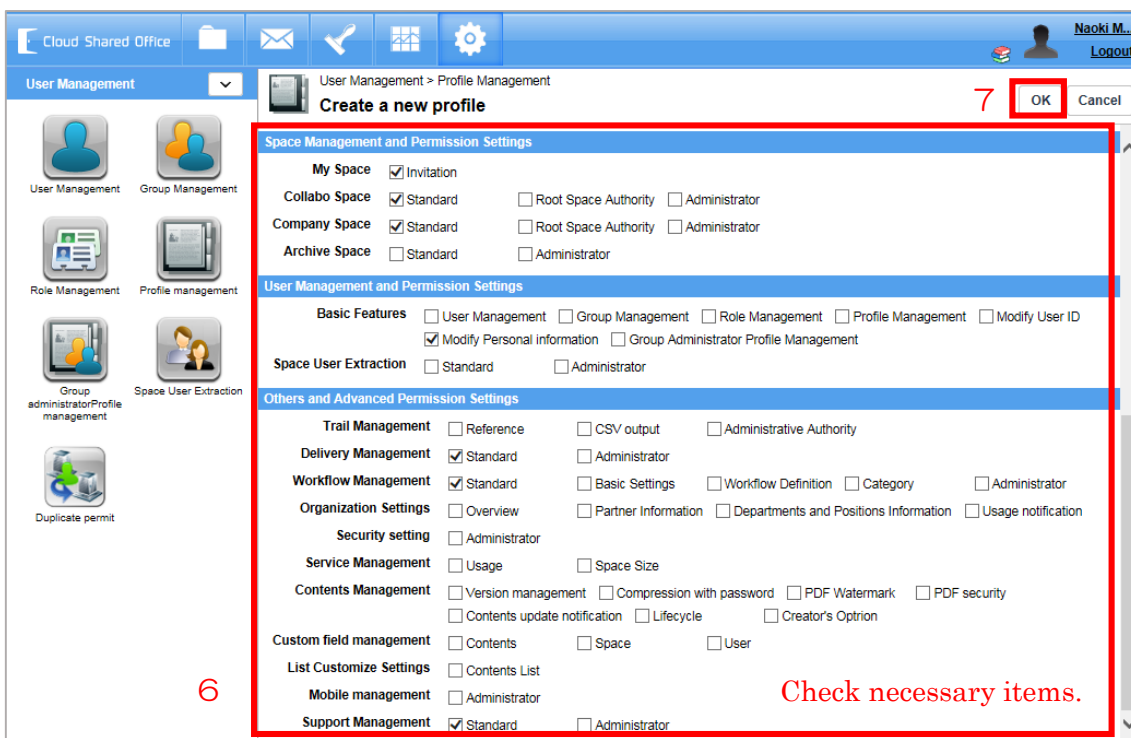


Insert any name for your new profile.

When creating a new profile, you may choose an existing profile as base profile, and create on top of that. To do so, select a profile in the Base ECM Profile drop-down list.

Next, specify the menu items to be shown in the application menu. Authorizations can

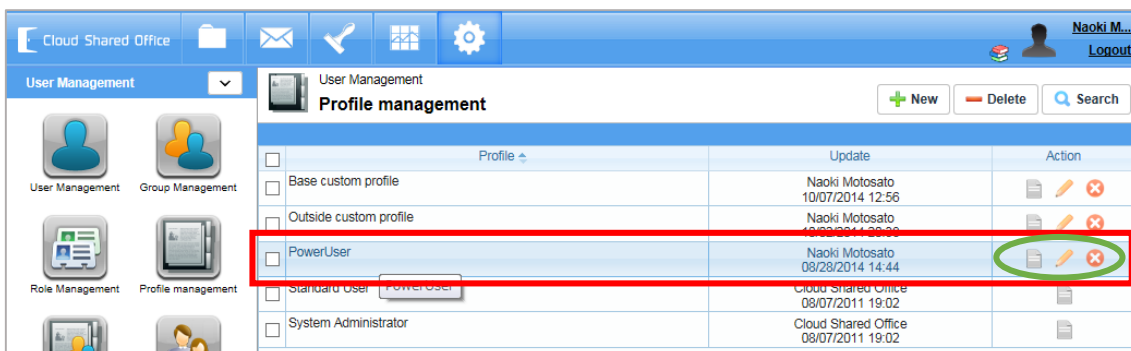
only be set for those features that pertain to your selected menu items.



Select the features for the profile under each menu, i.e., “Space Management and Permission Settings” or “User Management and Permission Settings”, and “Others and Advanced Permission Settings”. To select, check the boxes beside each feature.

※ The “Root Space Authority” under “Collabo Space” and “Company Space” is the authorization to create and access spaces right under the root space.

After checking all necessary features, click the “Save” button to save your configuration.



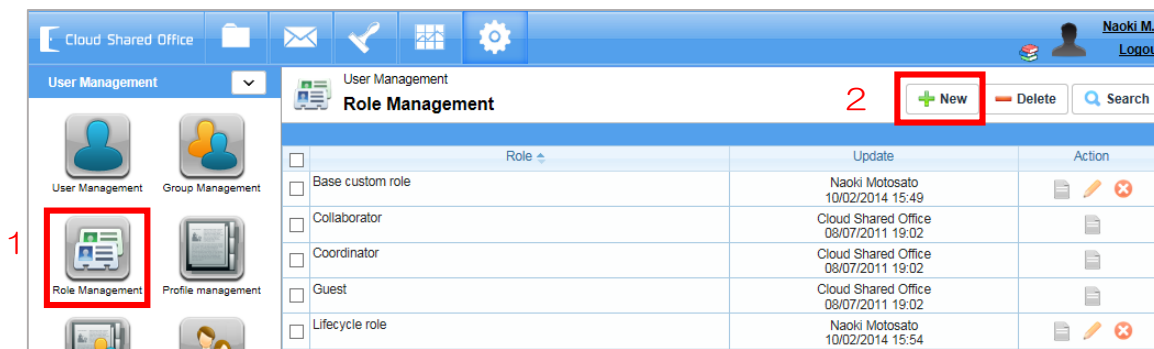
Confirm that your new profile has been registered. If you wish to edit the profile click the button, if you wish to delete the profile click the button.

### 2.9 Access Authorization to Files and Spaces Settings (Role)

In the Contents Management menu in CSO ECM, you can customize the access authorization to files and spaces for each user. This access authorization to files and spaces is called Role in CSO ECM.

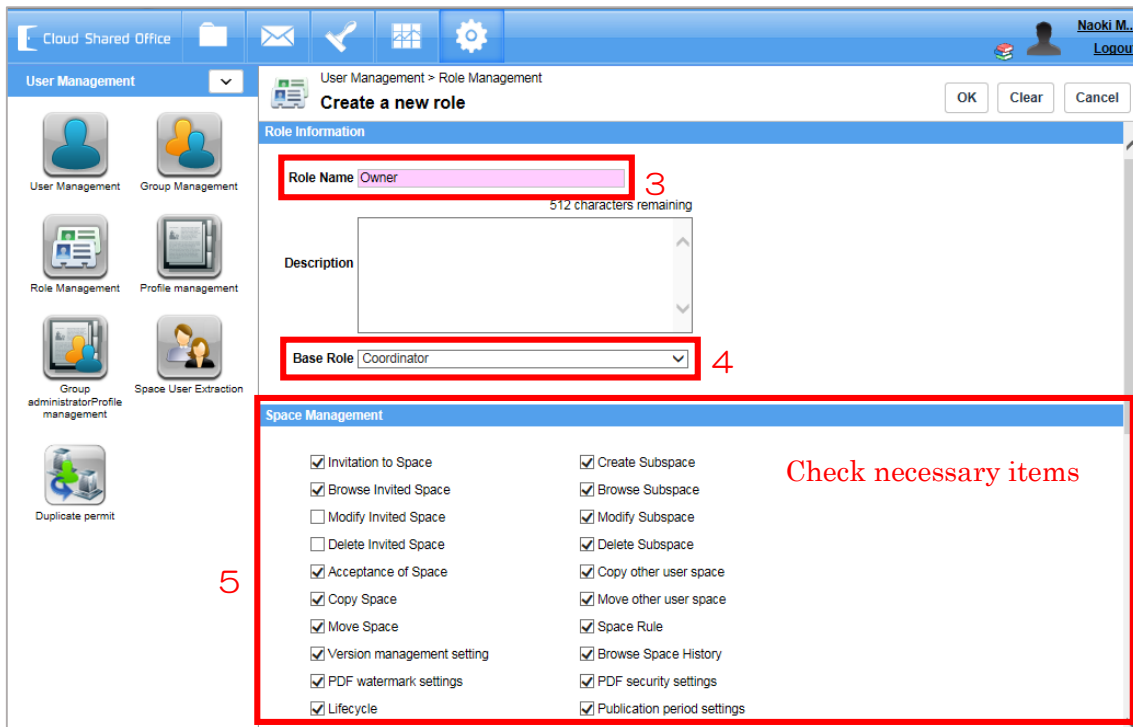
This section will introduce the steps to customize roles.

Select “Configuration” from the application menu, then select “User Management” from the chevron menu.



Select “Role Management” from the tree-view, then click the “New” button.

※ “Coordinator”, “Collaborator”, and “Guest” are default roles and cannot be edited or deleted. The order for more authorizations is in the following order: “Coordinator” > “Collaborator” > “Guest”.



## ECM Simple Setup Guide

Insert any name for your new role.

When creating a new role, you may choose an existing role as base role, and create on top of that. To do so, select a role in the Base Role drop-down list.

After selecting a base role, check the boxes beside the operations to authorize (under space management, content management, or others).

Cloud Shared Office

User Management > Role Management

**Create a new role** 7 OK Clear Cancel

**Contents Management**

- Add Contents
- Download the contents
- Reference
- Edit
- Create Web Text
- Acceptance of contents
- Copy Contents
- Move Contents
- Browse Properties
- Modify Properties
- Delete Contents
- Update other user contents
- Copy other user contents
- Move other user contents
- Browse other user contents property
- Modify other user contents property
- Delete other user contents
- Create link contents
- Delete link contents
- Play video / music

**Other**

- Browse Invited Users
- Modify Invited Users
- Delete Invited Users
- Move from Company Space
- Move from Collabo Space
- Archive
- Check In
- Check Out
- Cancel check out
- Contents Delivery
- Execute Workflow

6

Check necessary items.

After selecting your necessary operations, click the “OK” button to save your configuration.


Cloud Shared Office

User Management > Role Management

**Role Management** + New - Delete Search

Role	Update	Action
<input type="checkbox"/> Base custom role	Naoki Motosato 10/02/2014 15:49	
<input type="checkbox"/> Collaborator	Cloud Shared Office 08/07/2011 19:02	
<input type="checkbox"/> Coordinator	Cloud Shared Office 08/07/2011 19:02	
<input type="checkbox"/> Guest	Cloud Shared Office 08/07/2011 19:02	
<input type="checkbox"/> Lifecycle role	Naoki Motosato 10/02/2014 15:34	
<input type="checkbox"/> <b>Owner</b>	Naoki Motosato 08/28/2014 15:12	
<input type="checkbox"/> PDF role	Naoki Motosato 10/02/2014 15:53	

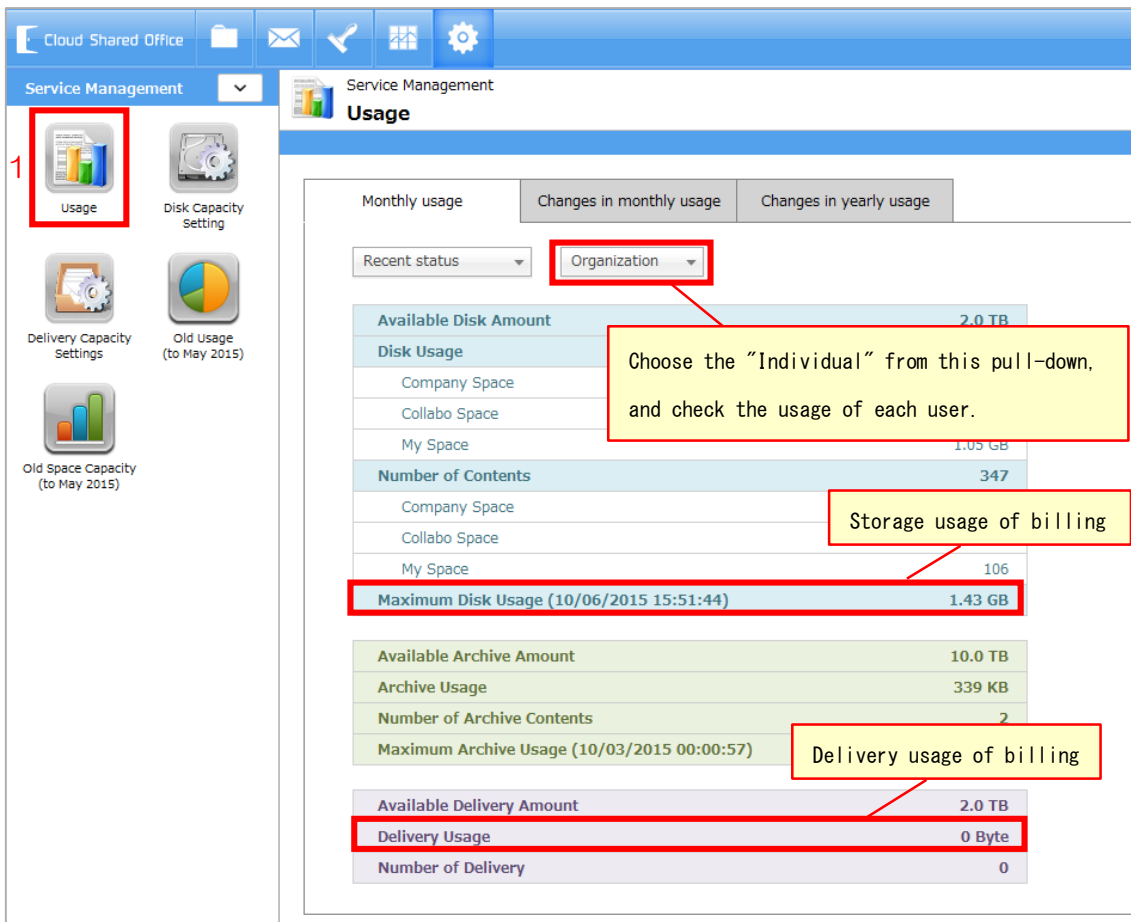
Confirm that your new role has been registered. If you wish to edit the role click the

button, if you wish to delete the role click the  button.

## 2.10 Check the usage

You may check the available amount, delivery usage and disk usage for each networking space, such as My Space or Collabo Space, etc.

Select “Configuration” from the application menu, then select “Service Management” from the chevron menu.



The screenshot shows the 'Usage' page in the 'Service Management' section. The sidebar on the left contains several icons, with the 'Usage' icon highlighted by a red box and a '1' next to it. The main content area displays usage statistics for 'Organization'. The 'Organization' dropdown menu is also highlighted with a red box. The table below shows usage for 'Company Space', 'Collabo Space', and 'My Space'. The 'Maximum Disk Usage (10/06/2015 15:51:44)' row is highlighted with a red box. The 'Delivery Usage' row is also highlighted with a red box. Yellow callout boxes provide instructions: 'Choose the "Individual" from this pull-down, and check the usage of each user.' (pointing to the Organization dropdown), 'Storage usage of billing' (pointing to the My Space row), and 'Delivery usage of billing' (pointing to the Delivery Usage row).

Category	Value
Available Disk Amount	2.0 TB
Disk Usage	
Company Space	
Collabo Space	
My Space	1.05 GB
Number of Contents	347
Company Space	
Collabo Space	
My Space	106
Maximum Disk Usage (10/06/2015 15:51:44)	1.43 GB
Available Archive Amount	10.0 TB
Archive Usage	339 KB
Number of Archive Contents	2
Maximum Archive Usage (10/03/2015 00:00:57)	
Available Delivery Amount	2.0 TB
Delivery Usage	0 Byte
Number of Delivery	0

Next, select “Usage” from the tree-view.

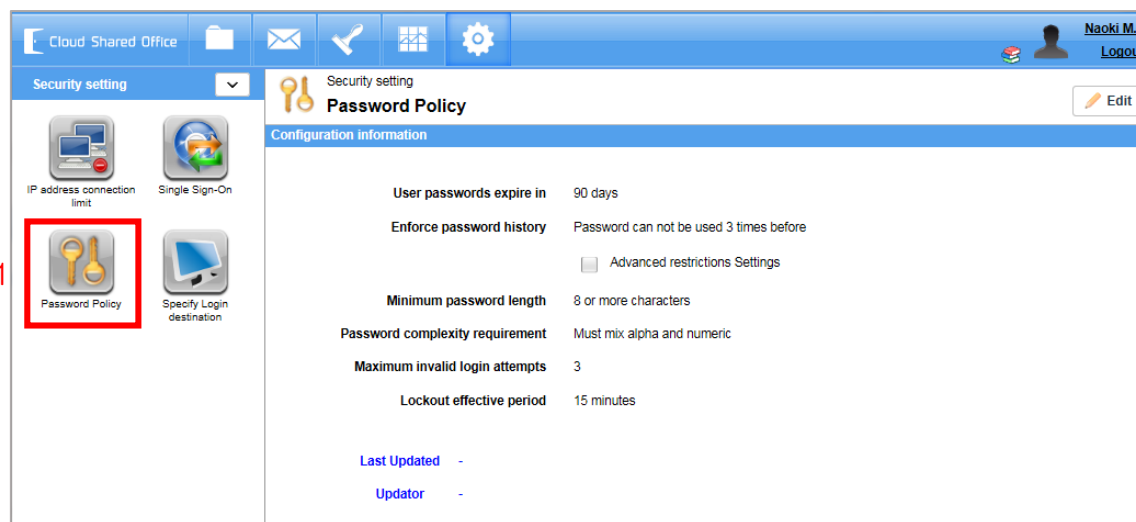
You can check the Monthly usage, monthly transition(shift,simulation), annually transition.

If "Maximum Disk Usage" and "Delivery Usage" are within the range of contract edition, overage charges will not arise.

### 2.11 Password Policy Settings

In CSO ECM, you may configure users' password format and the valid period for the passwords.

Select "Configuration" from the application menu, then select "Security Settings" from the chevron menu.



Select "Password Policy" from the tree-view. The default settings are as follows. If you wish to change the rules according to your company's ISMS standards, click the "Edit" button and insert appropriate values.

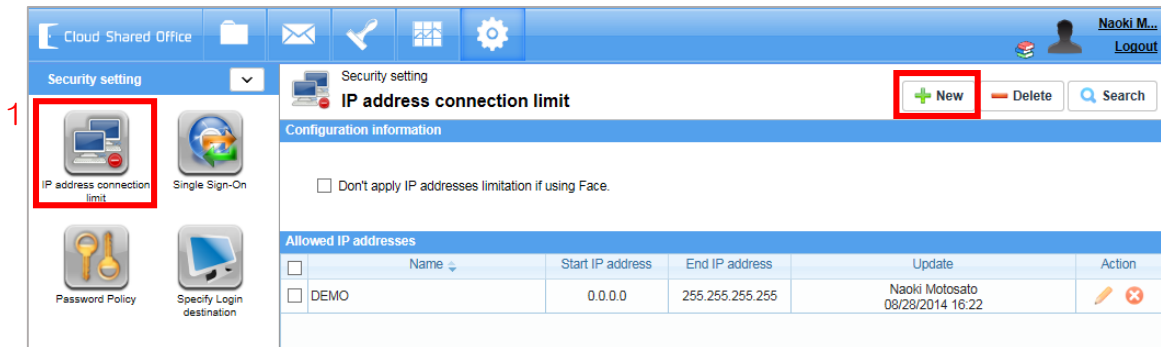
- ✓ User password expire in 90 days
- ✓ Enforce password history Password can not be used 3 times before (Advanced restrictions settings not activated)
- ✓ Minimum password length 8 or more characters
- ✓ Password complexity requirement Must mix alpha and numeric
- ✓ Maximum invalid login attempts 3
- ✓ Lockout effective period 15 minutes

### 2.12 IP Address Restriction Settings

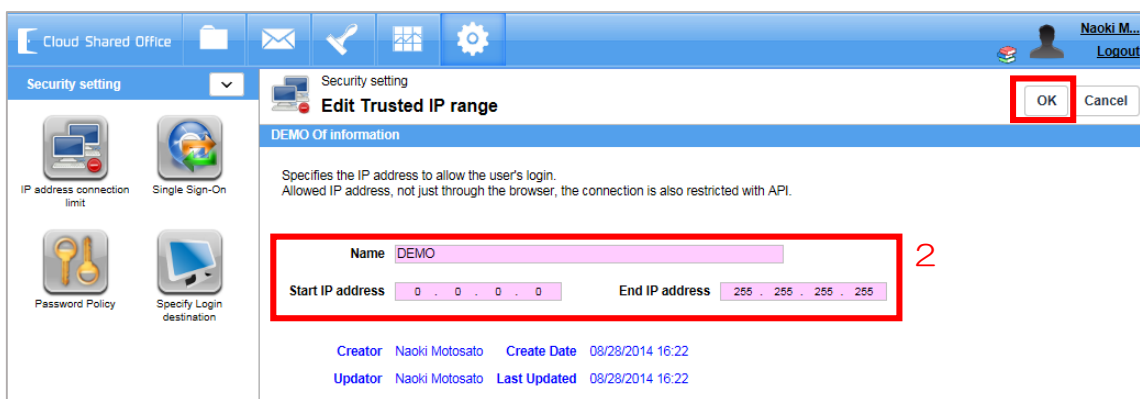
In CSO ECM, you may designate the allowed access IP address for login.

Select "Configuration" from the application menu, then select "Security Setting" from the chevron menu.

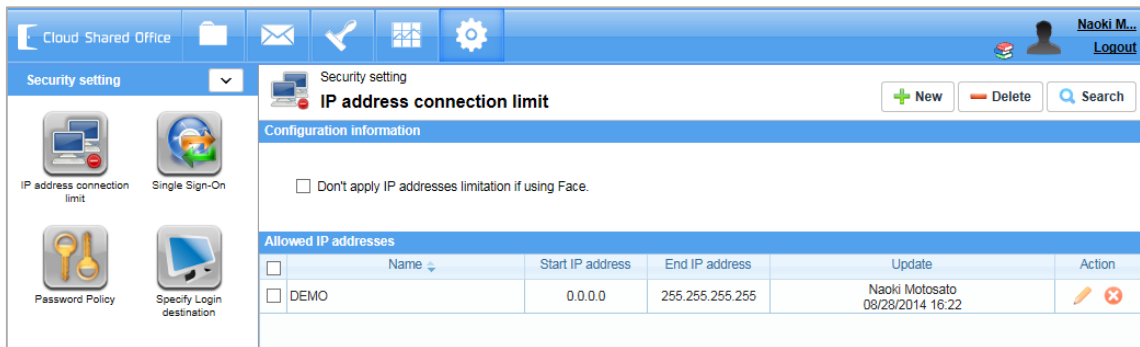
## ECM Simple Setup Guide



Select “IP address connection limit” from the tree-view, and click the “New” button.



Insert any name for your regulation, and click the “OK” button.



Confirm that your new regulation has been registered. If you wish to edit the regulation

click the button, if you wish to delete the regulation click the button.

Note that you may create multiple regulations and use them together.

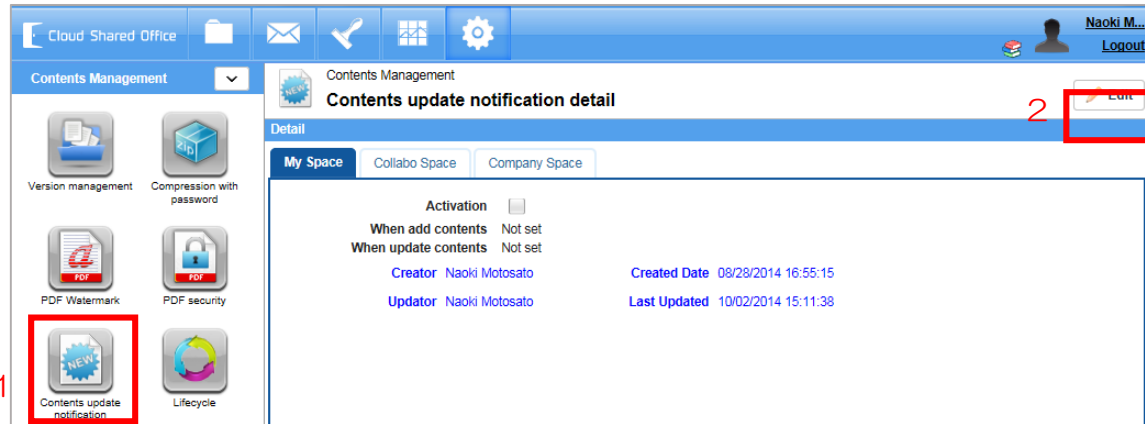
### 2.13 Contents Update Notification Settings

In CSO ECM, you may configure the length of the period to show the “NEW” icon and the “UPDATE” icon when files are newly uploaded or updated. The period can be

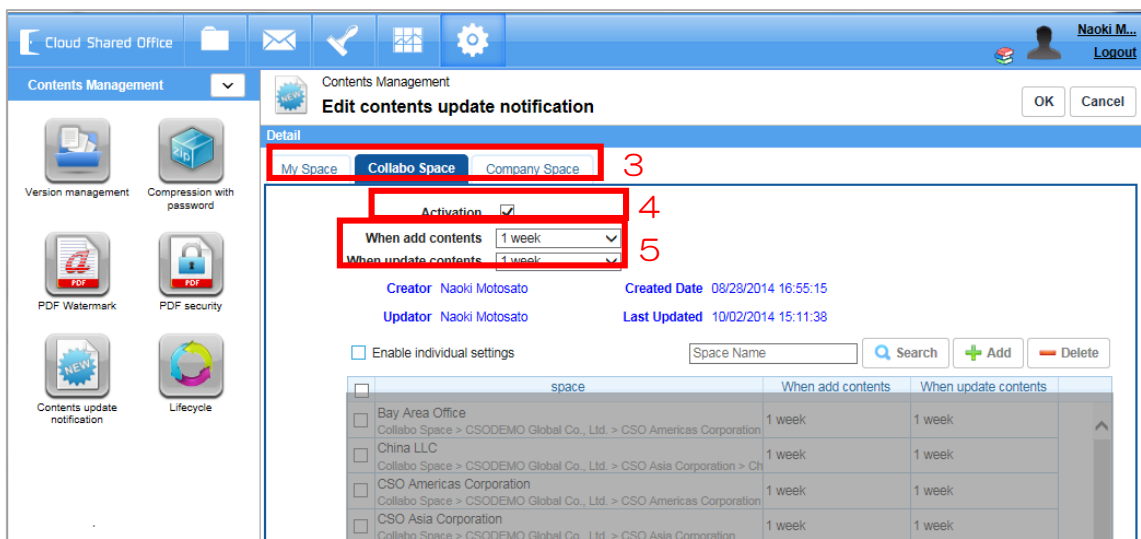
## ECM Simple Setup Guide

separately set for each space's directory.

Select “Configuration” from the application menu, then select “Contents Management” from the chevron menu.



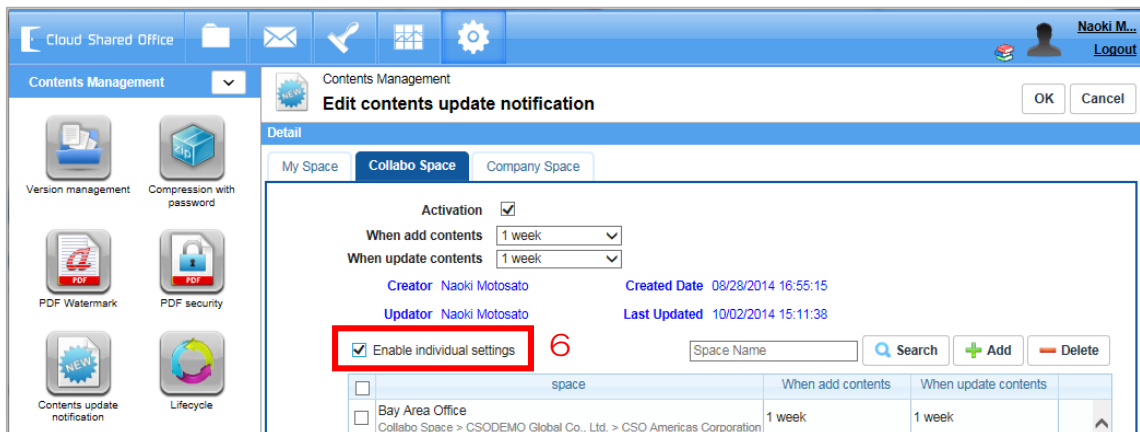
Select “Contents Updated Notification” from the tree-view, and click the “Edit” button.



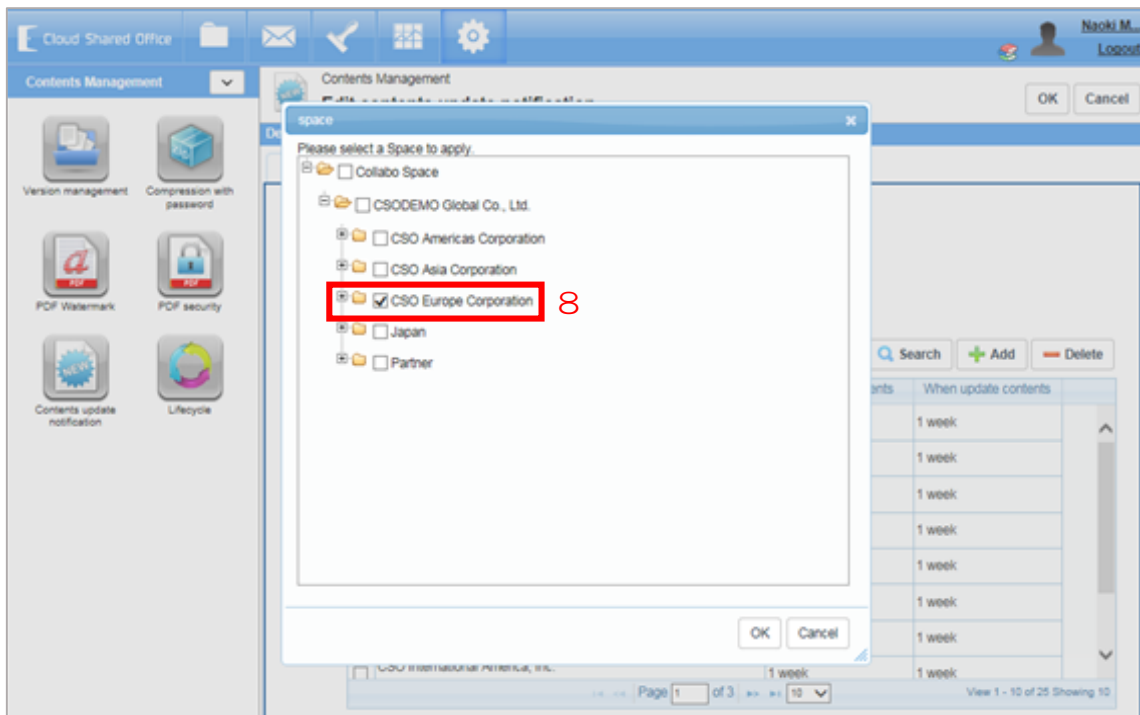
Select the space to edit, check the box beside “Activation”. Set the length of the period to display the “NEW” icon beside “When add contents” and set the length of the period to display the “UPDATE” icon beside “When update contents”.



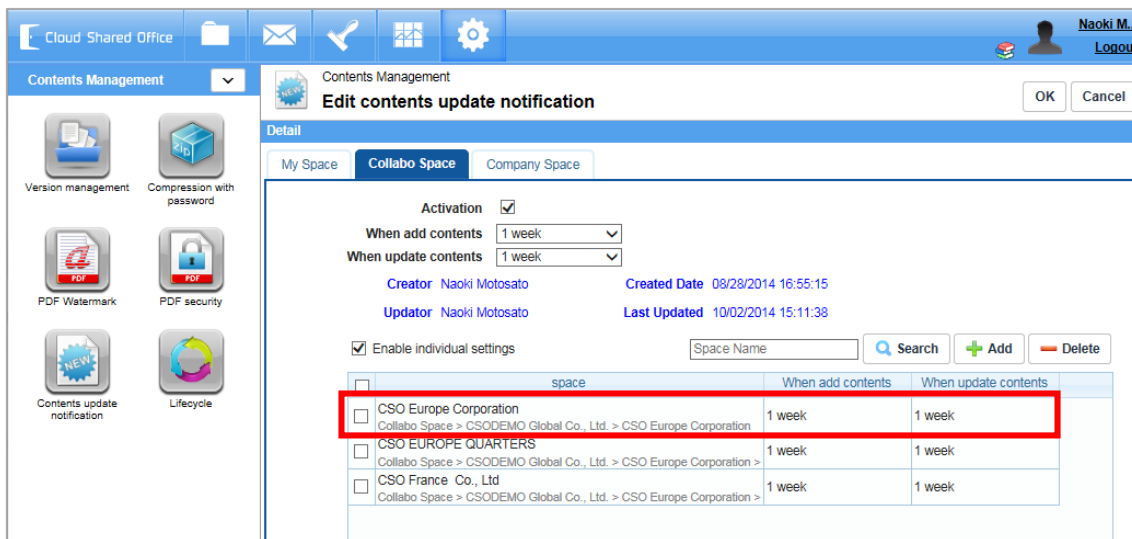
## ECM Simple Setup Guide



If you wish to separately configure the period for each individual space, check the box beside “Enable Personal Settings”.



Click the “Add” button, check the boxes beside your desired spaces, and click the “OK” button.



Confirm that your configuration has been added, and click the “OK” button.

### 3 In the End

Up to this point is the basic setup for enterprises to use CSO ECM. For more advanced usage, an advanced setup guide will be released soon.

## ECM Simple Setup Guide

### Revision History

Revision Date	Version	Contents of Revision	Reason for Revision	Reviser
2014/8/31	1	Newly created	Newly created Created the Simple Setup Guide for Cloud Shared Office ECM	Naoki
2015/10/6	2	Revised	Revisions for Ver.8.0.0 release Modified “Disk Capacity Setting” (2.3) Modified “Delivery settings” (2.4) Deleted “Check Usage Status” (2.9) Modified “Check Space Size” (2.10)	Suwa