Ver 2.0 2015 October 6

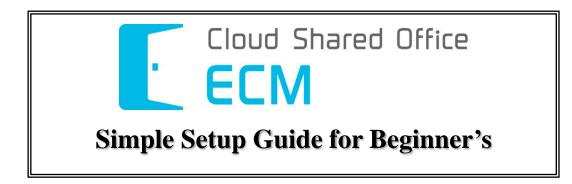




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1 In the Beginning

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.
- \checkmark 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.
- \Box 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.

- \Box Security settings
- ✓ Confirm and setup your password policy according to your company's ISMS standard.
- \checkmark 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.

Top menu∶this is	CSO ECM's applicati	ion menu User	ID: the user ID of the logged in user				
Cloud Shared Office		1 🔅	Naoki M.				
Organizational setting	Organizational settings User Management Organizational setting	n Information	Online manual: CSO ECM's manual				
Organization Partners Infor	Security setting Service Management Contents Management Custom field management Workflow Management	CSODFDEMO 2014 Co., Ltd. JP 108–0014 tokyoMinato-ku Shiba 5-33-7	Phone FAX Time zone (GMT+09:00) Japan Standard Time (Asia/To kyo) Language Japanese				
Departments and Notification of Positions	List Customize Settings Mobile management Support About CSO	hared Office Created Date 08/26/2014 09:34 otosato Last Updated 10/02/2014 20:40					
Collabo Space Unlimited /963.9 MB Chevron menu: the menu for various features.							

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

Tree-view: the menu fo	or various application features.	Nacki M Logout
Organization Partners Information Partners Information Partners Information Departments and Positions Notification of spaces	Edit the basic information of orgonization Information Organization Information Organization Name Country Japan - JP Postal 108 - 0014 State tokyo City Minato-ku Street Address Creator Cloud Shared Office Created Date Updator Naoki Motosato Last Updated Corporation space size infomation (limit / now) Collabo Space G M Unlimited / 96	Phone FAX Point! You may set different languages for different users.

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

ECM Simple Setup Guide

System-mail sender			
Sender name	CSODFDEMO 2014 Co., Ltd.	Configure the system mail address for features such workflow, etc. Default is: info@cloudsharedoffice.	
Sender address	csodfdemo@solxyz.co.jp		
	If you want to change the sender address, you mus (e.g.) example.co.jp. IN TXT "v=spf1 +mx include:s		
Organization logo			
Cloud Sha		o that is displayed on the upper left corner of ication menu, you may change it to any image file.	

After configuring your organization's basic information, let's configure your "Systemmail sender", and "Organization logo".

Organization Edit the	al setting basic information of organization	OK Cance
Corporation space size	ze infomation (limit / now)	
Collabo Space	GB 🗹 Unlimited / 963.9 MB	
Company Space	GB 🗹 Unlimited / 194 KB	

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

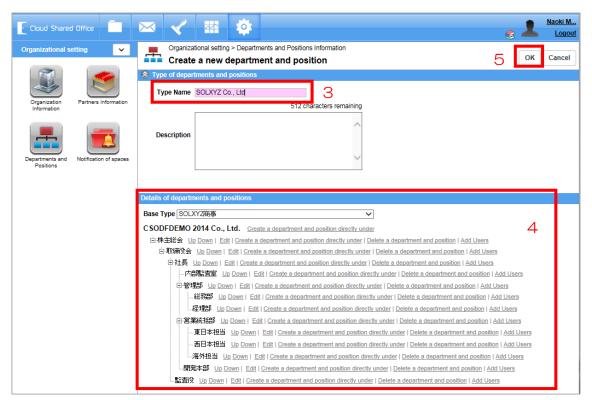
2.2 Departments/Positions Settings

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.

Cloud Shared	d Office		\bowtie	×	*	.			Antice Naoki M
Organizational se	etting	~	-	Depart	ional setting ments a	and Pos	itions	2 💽	New 🖌 🖌 Apply
Organization	Partners In	formation	Apply	e of depart	ments and 奇事	positions	Type Name	Update Cloud Shared Office 01/07/2015 10:35	Action
	Notification	of spaces					re ≪ Page 1 of 1 ⇒ ⇒ 10 V		/iew 1 - 1 of 1 Showing 1
Positions				FDEMO 2	ents and p 014 Co., L				-

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.

Cloud Shared Office	\bowtie	#	<u>e</u>	Naoki M Logout
Organizational setting 🗸		Organizational setting Departments and Positions	+ Ne	w 🖌 Apply
	🔕 Туре	e of departments and positions		
	Apply	Type Name	Update	Action
Organization Partners Information		SOLXYZ Co., Ltd	Naoki Motosato 01/09/2015 13:14	1 😣
	0	SOLXYZ商事	Cloud Shared Office 01/07/2015 10:35	/

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.

Cloud Shared Office	e 🖌 🛣 🔅
Service Management	Service Management Disk Capacity Setting
Usage Disk Capacity setting	Collabo Space 2
	Maximum size Unlimited settings 3 Contract Disk Capacity 2 TB
Delivery Capacity Old Usage Settings (to May 2015)	Notification Settings Enable Notification ON OFF Maximum size GB Unlimited
	OK Cancel
Old Space Capacity (to May 2015)	Utilization volume 349.22 MB (0.0 %) 100 %

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".

Notification Settings Enable Notification	ON OFF 4			
	2.84 TB	Determine the threshold	by moving this bar	
Threshold value	Utilization volume 339 22 45 (0.0 %) 5 28.4 %		100 %	
Notification	20.1 70	Profile	🕂 Add 💻	Delete
Notification	User 🕈	Pronie	Email	
	14	Page 0 of 0 >> >> 10 +	No recor	rds to view

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.

Cloud Shared	Office	∞ ≺ ∞ ¢	C Southand Contract C
Service Manage	ment 🗸	Service Management Disk Capacity Setting	Update Cancel
Usage	Disk Capacity	Notification X	
	Setting	Company All Div/Pos All Name Search Clear	
100		User Profile Email	
Delivery Capacity Settings	Old Usage (to May 2015)	SOLXYZ Co., Ltd. (伊术-N枝証用Enterprise Edition) System Administrator System Administrator	
Settings	(10 Hay 2015)	SOLXYZ Co., Ltd. (步术-F核証用Enterprise Edition) Employee (kkatouemployee@60demo.com) System Administrator	
	7	SOLXYZ Co., Ltd. (Partner Main) Standard User Lee John (john@60demo.com) Standard User	6
Old Space Capacity (to May 2015)	7	SOLXYZ Co., Ltd. (サポート検証用Enterprise Edition) Mami Motohashi (mientrasestudiaba@salesfoce.es) System Administrator	🕂 Add 🗕 Delete
		SOLXYZ Co., Ltd. (垪木-F城証用Enterprise Edition) System Administrator Solarya Co., Ltd. (均木-F城証用Enterprise Edition) System Administrator	Email
		SOLXYZ Co., Ltd. (Partner Main) Smith Anne (anne@60demo.com) Standard User	
		SOLXYZ Co., Ltd. (伏术-N模钮用Enterprise Edition) Tom Watson (tw@60demo.com) Standard User	
		SOLXYZ Co., Ltd. (Partner Main) YOSHIMI SUWA (yosuwa@60demo.com) System Administrator	
		r≼ << Page 1 of 1 →> > 50 → View 1 - 33 of 33 Showing 33	No records to view
		8 ок Салсе	NO FECOROS LO VIEW

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

Service Management Disk Capacity Setting	9 Update Cancel
Archive	
Notification Settings	
Enable Notification ON OFF	
2.84 TB	10.00 TB
Threshold value Utilization volume 339 93 KB (0.0 %)	
28.4 %	100 %

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.

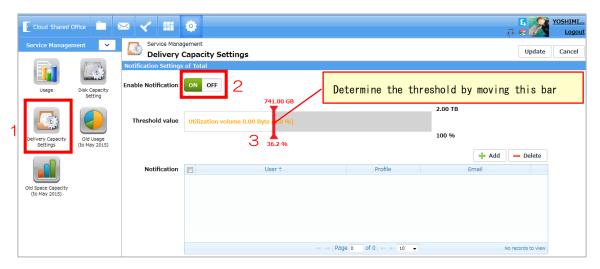
Caution: Please be aware that without setting a maximum limit to the organization space, unlimited files can be stored. When the stored volume exceeds your contracted capacity, excess charges will be charged.

2) Delivery Capacity Settings

Select "Configuration" from the application menu, select "Service Management" from the

chevron menu.

Select "Delivery Capacity Settings" from the tree-view.



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.

Cloud Shared	Office			‡				1 8 9
Service Manage	ement 🗸 🗸		Service Ma	nagement / Capacity Settings				Update
				gs of Total				
	تعني	El Noti	ification				×	
Usage	Disk Capacity Setting	Co	mpany All	Div/Pos All	Name	Search	ear	
4003			3	User 🗢	Profile	Email		
Delivery Capacity Settings	Old Usage (to May 2015)	E	S 2 5	DLXYZ Co., Ltd. (サポート検証用Enterprise Edition) (test7@60demo.com)	System Administrator		<u> </u>	4
Settings	(10 May 2015)	E		DLXYZ Co., Ltd. (サポート検証用Enterprise Edition) mployee(kkatouemployee@60demo.com)	System Administrator		= 🕂 Ad	d 📃 — Delete
		E		DLXYZ Co., Ltd. (Partner Main) ee John (john@60demo.com)	Standard User		ail	
Old Space Capacity (to May 2015)				DLXYZ Co., Ltd. (サポート検証用Enterprise Edition) ami Motohashi (mientrasestudiaba@salesfoce.es	System Administrator			
()				DLXYZ Co., Ltd. (サポート検証用Enterprise Edition) aito AA (saito@60demo.com)	System Administrator			
				DLXYZ Co., Ltd. (Partner Main) mith Anne (anne@60demo.com)	Standard User			
		E		DLXYZ Co., Ltd. (サポート検証用Enterprise Edition) om Watson (tw@60demo.com)	Standard User		5	
				DLXYZ Co., Ltd. (Partner Main) OSHIMI SUWA (yosuwa@60demo.com)	System Administrator			No records to view
		N		ra ka Page 1 0	f 1 🕨 🕬 50 🔻	View 1 - 33 of 33 Showin	g 33	
		E				6 ОК Сало	el	

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.

Notification Setting	s for each user					
Enable Notification	ON OFF					
Threshold value	100 %	•				
Notify each person	ON OFF	Other notification destination	ON OFF		🕂 Add 📃 — De	lete
		Us	er 🗢	Profile	Email	
			ia <a 0="" 0<="" page="" th=""><th>f 0 >> >= 10 👻</th><th>No records to</th><th>view</th>	f 0 >> >= 10 👻	No records to	view

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

63	Service Management Update Update Cancel							
Delivery								
Notification Settings of Total								
Enable Notification ON OFF								
	741.00 GB	2.00 TB						
Threshold value	Utilization volume 0.00 Byte 0.0 %)							
	36.2 %	100 %						

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.

- 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.

	Cloud Shared Office	∞ 🗸 🕸	ø		0 9	<u>YOSHIMI</u> Logout
	Delivery settings 🔹 🗸	Delivery se Basic S	-		2	🥖 Edit
		Period & Number	of Down	oads		
1	Basic Settings	Pe	eriod	Initial 10 days		
	Delivery Rule	Numb Downle		Impossible to change by user. Initial 99 times Impossible to change by user.		
		Sender's Email				
		Se	nder U	e the email address of the person who delivers		

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

Delivery settings Edit Basic Se	ettings 4 OK Cancel
Period & Number of Dov	vnloads
Period	Initial 10 days
	Impossible to change by user.
Number of Downloads	Initial y99 times
	Impossible to change by user.
Sender's Email	
	Cluse the email address of the person who delivers
3	Use the Organizational setting's [Sender's email]

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.

Cloud Shared Office	\bowtie	\prec 🖽 🔅			e 1	Logout
User Management 🔍		User Management	2 + New	/ Reminder	🛉 Import 🛛 🖣 Export	Q Search
1		User Management		Kennider		
		User 🔶	Usage End Date	Profile	Last login date	All V Status
Iser Managemen Group Management		CSODEMO Global Co., Ltd. David Brown (david@csodf14.com)		Base custom profile	10/15/2014 00:28	🙂 😼
		CSODFDEMO 2014 Co., Ltd. Chatter Expert (chatty.00d10000000b9qie		Standard User		🙂 😺
Role Management Profile management		ISHIBE semiconductor. Co, Ltd Jiro Ishibe (jiro@csodf14.com)		Outside custom profile	10/02/2014 20:48	ي 🙂
		CSODFDEMO 2014 Co., Ltd. Ishibe Jiro (mjiro@csodf14.com)		Standard User	01/07/2015 10:29	ي 🙂
		CSODEMO Global Co., Ltd. Maria Jenkins (maria@csodf14.com)		Base custom profile	10/14/2014 02:04	يو 🙂
Group Space User Extraction administratorProfile		CSODFDEMO 2014 Co., Ltd. kamile tomitaka (tkamile@Training2014.com	08/25/2016 00:00 (GMT+09:00)	Standard User		ي 🙂
management		集式会社ソルクシーズ Naoki Motosato (admin@csodf14.com)		System Administrator	01/09/2015 10:25	<u> </u>
		NAOKI industry Co, Ltd Naoki Hanako (hanako@csodf14.com)	09/30/2015 18:00 (GMT+09:00)	Base custom profile	01/07/2015 10:33	<u> </u>
Duplicate permit		CSODEMO Global Co., Ltd. John Smith (john@csodf14.com)		Base custom profile	10/15/2014 01:17	<u> </u>

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

Cloud Shared Office	× < #		e 💄 Naoki M
User Management	Personal setting Edit the pe	ersonal inform	mation OK Cancel
User Management	My information	Nauk	User IDs are in e-mail address format (e.g. @domain.com). It can be set to a non-existing address.
Role Management Profile management		otosato	Profile System Administrator
	First Name Na Yomi Na	aoki aoki	Company CSODFDEMO 2014 Co., Ltd. Motosato Employee Number
Group Space User Extraction administratorProfile management	User ID ad	dmin@csodf14.con	
		aoki motosato	
Duplicate permit	Departments and Position departments and positions	ons Information	Add the department/position that was just created. Delegated Approver
		部監査室	Superior Superior
	Area and Language Time zone (GMT+08 Language English	3:00) Singapore Sta	andard Time (Asia/Singapore)
	Personal usage Basic information	on Grou	up information

Cloud Shared Office	🖂 🗸 🛱 🔅
User Management	Edit the personal information
User Management	My information Departments and Positions Informa Set time-zone and language. Displayed language for all menu item can be changed. (Japanese, English, Chinese)
Role Management	内部 谷 公 Area and Language
	Time zone (GMT+08:00) Singapore Standard Time (Asia/Singapore) Language English
Group Space User Extraction administratorProfile management	Personal usage
	Used Disk 40.48 MB Available Disk Space 5 GB Unlimited Used Delivery 0 Byte Available Delivery Space 5 GB Unlimited
Duplicate permit	Notification of personal usage
	Disk Space threshold 80 GB V Active of My Space, and the limit to its
	Delivery Size threshold 80 GB V Active delivery amount.
	Basic Information Group Information
	Set the threshold for individuals and notifications can be sent to the specific individual when threshold is reached

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
 - \cdot 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.

	Cloud Shared Office	🖂 🖌 🗰 🔅	es 💄 Naoki M
1	User Management	User Management 2	- Delete Changeview Q Search
	User Management	Group ☆ Customer Service SLA Project It is a group of our customer service team .	Update Action Naoki Motosato 01/06/2015 15:12
		Everyone	Cloud Shared Office 08/07/2011 19:02
	Role Management Profile management		

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

Cloud Shared Office	Group Management Create a new G Group Information	Set a group name.		GK Cancel
User Management	Group Name Custome	r Service SLA Project	469 characters remaining	Describe the purpose for the group.
Role Management Profile management	It is a gro	oup of our customer service team.	ĵ	
Group administratorProfile			🕂 Add 🗕 Delet	You may also set hierarchies to groups.
administrator/rome management Duplicate permit	Parent group	Name		3
	Basic information	Administrator		- Delete

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

All	~	All departments and positions in	formation 🗸				
Jser			Search	Clear			
		Name 🔶		Company			
1	Jiro Ishibe (jiro@csodf14 - Ishibe Jiro (mjiro@csodf			CSODFDEMO 2014 Co., Ltd.	^		
- 1	Maria Jenkins (maria@csodf14.com) CSODEMO Global Co., Ltd.						
⊻ 🤰	- kamile tomitaka (tkamile	@Training2014.com)		CSODFDEMO 2014 Co., Ltd.			
× 1	- Naoki Motosato (admin@	gcsodf14.com)		CSODFDEMO 2014 Co., Ltd.			
	Naoki Hanako (hanako@	(csodf14.com)		NAOKI industry Co, Ltd			
- 4	John Smith (john@csod	14.com)		CSODEMO Global Co., Ltd.			
- 2	- Patricia Taylor (patricia@			CSO International America, Inc.	~		
		I d K d Page 1 of	2	View 1 - 10 of 11 Sh	owing 10		

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

Cloud Shared	Office	× × # 🔅		e Logout
User Management	~	User Management Group Management	- Delete	Changeview Q Search
User Management	Group Management	Group ♠ Customer Service SLA Project It is a group of our customer service team .	Update Naoki Motosato 01/06/2015 15:12	Action
æ		Everyone	Cloud Shared Office 08/07/2011 19:02	
Role Management	Profile management			

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.

Cloud Shared Office		× #	*				<u>s</u>	Naoki M Logout
User Management	<u> </u>	User Management			lew 🛛 👒 Reminder	🖶 Import	Export	Q Search
		o ser manage					A	
		ι	Jser 🔶	Usage End Date	Profile	Last logir	n date	Status
User Management Group Managem	ent 🗌	CSODEMO Glob David Brown (d	al Co., Ltd. avid@csodf14.com)		Base custom profile	10/15/201	4 00:28	🙂 😡
			nagement					
		Import	t users					
Role Management Profile management	ent							-
		Encode	sjis 🗸					
			File Name			Size	Status	
				Plea	ase drag & drop it.			<u>^</u>
		File						
								\sim
			💿 Select a file 👔 🕆 U	pload		0 b	0%	
						00	0,0	
			Using runtime	e: html5				
You c	an chec	k the the	format of csv	file to imp	ort by			
evport	ing use	r info						
export	use use	i iiio.						

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	e jlastn	ame_kana fi	rstname_kana	userid		mail		homespace	profile	e i i	
Vlotosato	Nao ki	Naok	d M	lotosato	admin@csodf14.0	com	mnao ki@so	lxyz.co	.jp naoki motosato	Syste	m Adm	ninistr
Brown	David				david@csodf14.c	om	yosuwa@so	olxyz.co	o.jp david	Base	custor	m pro
Nao ki	Hanako				hanako@csodf14	l.com	yosuwa@so	olxyz.co	o.jp hanako	Base	custor	m pro
Ishibe	Jiro _				im@ceodf14.com	n	ഗാലാഗാരില	nhar er	n in linn	Outei	de cue	tom
Smith	John		User Manageme	ent								
Williams	Linda		Import							Cance	el F	Run
Jenkins	Maria	Contents	•									
Ishibe	Jiro	contents										
Taylor	Patricia	A	di 🛛	<u>11</u>								
kamila	tomitak	Creat		8								
		Updat	te									
		Updat	te	3								
		Updat Fa	te iil	3	User ID 🔶	Prof	īle E	Enable	Remarks			
		Updat Fa Detail Categor	te iil	3		Prof			Remarks Jser ID is illegal.			
		Updat Fa Detail Categor Fail	te iil Usern: New User	ame aaa			d User					
		Updat Fa Detail Categor Fail Create	te iil Usern New User	ame aaa	3	Standar	d User ministrator	Valid L				

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

XIn 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.

Cloud Shared Office	∞ 🗸 🖾 🔅		e La Naoki M Logout
User Management	User Management Profile management	2 + New - 1	Delete Q Search
	Profile 🔶	Update Naoki Motosato	Action
User Management Group Management	Outside custom profile	10/07/2014 12:56 Naoki Motosato	
	PowerUser	10/02/2014 20:38 Naoki Motosato 08/28/2014 14:44	
Role Management Profile management	Standard User	Cloud Shared Office 08/07/2011 19:02	E
	System Administrator	Cloud Shared Office 08/07/2011 19:02	Ē
Group Space User Extraction			

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.

Cloud Shared Office	🖂 🧹 🗰 🔅 Statistical Statis
User Management 🗸	User Management > Profile Management Create a new profile OK Cancel
	Profile Information
User Management Group Management	Profile Name Power User 3
Role Management	512 characters remaining Description
Grop administratorPofite management	Base profile Standard User V 4
	Menu settings
Duplicate permit	Hiding and Showing Menu to display Menu not to display 5 Contents Delivery Workflow Configuration
	Hide
	Default Contents V

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.

Cloud Shared Office	∞ 🗸 🔛	*		1 و	<u>Naoki M</u> Logout
User Management	User Management > I Create a new p	-		7 ок	Cancel
	Space Management and Perm	ission Settings			
	My Space 🗸 Invitat	ion			
User Management Group Management	Collabo Space Stand		Space Authority	dministrator	
	Company Space Stand			dministrator	
	Archive Space Stand				
			ion ator		
Role Management Profile management	User Management and Permis				
	_	-		Role Management Profile Management Modify User	ID
				inistrator Profile Management	
Group Space User Extraction	•		Administrator		
administratorProfile management	Others and Advanced Permis	sion Settings			
management	Trail Management	Reference	CSV output	Administrative Authority	
	Delivery Management	Standard	Administrator		
	Workflow Management	Standard	Basic Settings	Workflow Definition Category Administrator	
Duplicate permit	Organization Settings	Overview	Partner Informatio	n Departments and Positions Information Dusage notificati	ion
	Security setting	Administrator			
	Service Management	Usage	Space Size		
	Contents Management	Version manageme	ent Compression	with password PDF Watermark PDF security	
		Contents update n	otification 🗌 Lifecycl	e Creator's Optrion	
	Custom field management	Contents	Space	User	
	List Customize Settings	Contents List			
6	Mobile management	Administrator		Check necessary items	3.
	Support Management	Standard	Administrator		\sim

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.

X 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.

Cloud Shared	Office	\bowtie	× #	*			e 上 '	Naoki M Logout
User Management	~		User Management Profile manage	ement		🕂 New 📃 🗕	Delete	Search
User Management	Group Management		ase custom profile	Profile 🔶	Update Naoki Motos 10/07/2014 1		Action	n 🔀
			utside custom profile		Naoki Motos	ato	B /	8
			owerUser		Naoki Motos 08/28/2014 1			8
Role Management	Profile management		andard Oser Poweros		08/07/2011 1			
	20	□ ^{Sy}	ystem Administrator		Cloud Shared 08/07/2011 1		B	

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.

	Cloud Shared Office	\succ	🛚 🖌 🚟 🏟		e L Naoki M Logout
	User Management	ļ	User Management Role Management	2 + New -	Delete Q Search
	User Management Group Management		Role 🌩	Update Naoki Motosato	Action
			Collaborator	10/02/2014 15:49 Cloud Shared Office 08/07/2011 19:02	
1			Coordinator	Cloud Shared Office 08/07/2011 19:02	Ē
	Role Management Profile management		Guest	Cloud Shared Office 08/07/2011 19:02	B
			Lifecycle role	Naoki Motosato 10/02/2014 15:54	🖹 🥖 😣

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

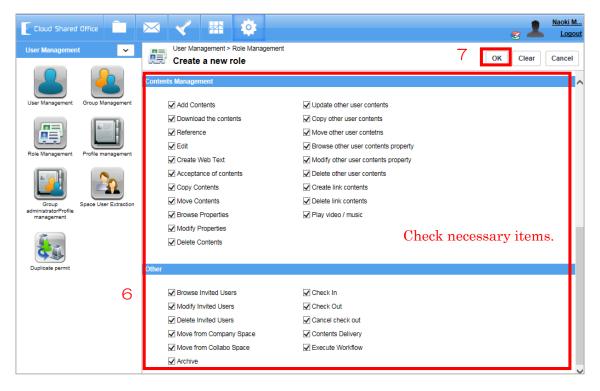
* "Coordinator", "Collaborator", and "Guest" are default roles and cannot be edited or deleted. The order for more authorizations is in the following order: "Coordinator" > "Collaborator" > "Guest".

Cloud Shared Office	× * *		es 💄 Naoki M
User Management	User Management > Role Managemen Create a new role	nt	OK Clear Cancel
User Management	Role Name Owner	512 characters remaining	î
Role Management	Description	Ô	
Group administratorProfile	Base Role Coordinator	<u> </u>	
management	Space Management	 ✓ Create Subspace ✓ Browse Subspace 	Check necessary items
Duplicate permit	Modify Invited Space Delete Invited Space Acceptance of Space Copy Space	 ✓ Modify Subspace ✓ Delete Subspace ✓ Copy other user space ✓ Move other user space 	
	 ✓ Copy space ✓ Move Space ✓ Version management setting ✓ PDF watermark settings 	 ✓ Move other user space ✓ Space Rule ✓ Browse Space History ✓ PDF security settings 	
	Lifecycle	Publication period settings	

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).



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

Cloud Shared Office	× × #		e 💄 Naoki M Logout
User Management	Role Management	🕂 New 📃	Delete Q Search
	Role 🔶	Update	Action
User Management Group Management	Base custom role	Naoki Motosato 10/02/2014 15:49	🗎 🥖 😣
	Collaborator	Cloud Shared Office 08/07/2011 19:02	
	Coordinator	Cloud Shared Office 08/07/2011 19:02	B
Role Management Profile management	Guest	Cloud Shared Office 08/07/2011 19:02	
	Lifecycle role	Naoki Motosato	
	Cwner	Naoki Motosato 08/28/2014 15:12	
Group Space User Extraction administratorProfile management	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 \bigotimes 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.

Cloud Shared Office	🖂 🖌 🏧 🏟	
Service Management	Service Management	
	Osage	
1 Usage Disk Capac Setting	y Monthly usage Changes in monthly usage Cha	nges in yearly usage
	Recent status	
Delivery Capacity Old Usage	Available Disk Amount	2.0 TB
Delivery Capacity Old Usage Settings (to May 201) Disk Usage Choose the "Ind	ividual" from this pull-down,
	Company Space	
		sage of each user.
	My Space	1.05 GB
Old Space Capacity (to May 2015)	Number of Contents	347
	Company Space	Storage usage of billing
	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)	Delivery usage of billing
	Available Delivery Amount	2.0 ТВ
	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.

Cloud Shared Office	🖂 🖌 🐺 🌼	es 💄 Naoki M
Security setting	Security setting Password Policy	🖊 Edit
	Configuration information	
IP address connection Single Sign-On limit	User passwords expire in	90 days
	Enforce password history	Password can not be used 3 times before
		Advanced restrictions Settings
Password Policy Specify Login destination	Minimum password length	8 or more characters
destination	Password complexity requirement	Must mix alpha and numeric
	Maximum invalid login attempts	3
	Lockout effective period	15 minutes
	Last Updated -	
	Updator -	

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.

\checkmark	User password expire in	90 days
\checkmark	Enforce password history	Password can not be used 3 times before
		(Advanced restrictions settings not activated)
\checkmark	Minimum password length	8 or more characters
\checkmark	Password complexity requirement	Must mix alpha and numeric
\checkmark	Maximum invalid login attempts	3
\checkmark	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.

Naoki M	🥃 💄				<u>o</u>	× #	\bowtie	Ê	oud Shared Office	
Q Search	🕂 New 🗕 Delete	4		n limit	nnection I	Security setting IP address co	-	×	rity setting	1
Configuration information Don't apply IP addresses limitation if using Face.							le Sign-On	ess connection limit		
						I IP addresses	Allowed		01	
Action	Update	ss Upda	End IP address	Start IP address	-	Name 🖕				
1 3	aoki Motosato /28/2014 16:22		255.255.255.255	0.0.0.0		MO		cify Login		
	aoki Motosato	Naoki Mo			,	Name 🖕		cify Login stination	Sword Policy Spec	

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

Cloud Shared Of	fice	∞					Naoki M Logout
Security setting		Security set	^{ting} sted IP range			0	K Cancel
			dress to allow the user	r's login. prowser, the connection is also restric	cted with API.		
		Name	DEMO			2	
Password Policy	Specify Login destination	Start IP address	0.0.0	. 0 End IP address	255 . 255 . 255 . 255		
		Creator Updator		Create Date 08/28/2014 16:22 st Updated 08/28/2014 16:22			

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

Cloud Shared O	Iffice	× < 🗰 🔅			Naoki M Logout
Security setting	~	Security setting IP address connection I	limit	- Delete	Q Search
IP address connection limit	Single Sign-On	Configuration information	if using Face.		
78		Allowed IP addresses			
		Name 🖕	Start IP address End IP address	Update	Action
Password Policy		DEMO	0.0.0.0 255.255.255	Naoki Motosato 08/28/2014 16:22	/ 😣
	00000000				

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

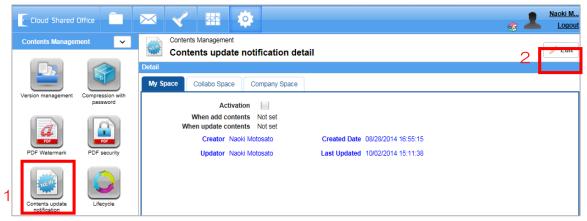
click the *f* button, if you wish to delete the regulation click the *s* button. Note that you may create multiple regulations and use them together.

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

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.

Cloud Shared	Office	🖂 🖌 🐺				Naoki M Logout
Contents Manager	nent 🗸	Contents Management Edit contents update notification			0	K Cancel
		Detail My Space Collabo Space Company Space	3			
Version management	Compression with password	Activation V When add contents 1 week	4			
A PDF	PDF	When add contents 1 week v When update contents 1 week v Creator Nacki Motosato	5 Created Date: 08/28/2014 16:55:15			
PDF Watermark	PDF security		Last Updated 10/02/2014 15:11:38			
NEWE		Enable individual settings	Space Name	Q Search	🕂 Add 🕨	- Delete
		space	When add cor	itents When	update contents	5
Contents update notification	Lifecycle	Collabo Space > CSODEMO Global Co., Ltd. >	CSO Americas Corporation	1 week		~
		China LLC Collabo Space > CSODEMO Global Co., Ltd. >	CSO Asia Corporation > Ch	1 week		
		CSO Americas Corporation Collabo Space > CSODEMO Global Co., Ltd. >	CSO Americas Corporation 1 week	1 week		
		CSO Asia Corporation Collabo Space > CSODEMO Global Co., Ltd. >	CSO Asia Corporation	1 week		

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".

Cloud Shared Office	🖂 🎸 🗰 🔅
Contents Management	Contents Management Edit contents update notification OK Cancel
	Detail
	My Space Collabo Space Company Space
Version management Compression with password	Activation 🖌
	When add contents 1 week When update contents 1 week V
	Creator Naoki Motosato Created Date 08/28/2014 16:55:15
PDF Watermark PDF security	Updator Naoki Motosato Last Updated 10/02/2014 15:11:38
	Enable individual settings 6 Space Name Space Name Add - Delete
	space When add contents When update contents
Contents update Lifecycle notification	Bay Area Office Collabo Space > CSODEMO Global Co., Ltd. > CSO Americas Corporation 1 week 1 week

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

Cloud Shared Office	∞ < = \$	e L Naoki M
Cloud Shared Office Contents Management Version management Version management Pof Vatermark Pof security Pof security	Contents Management Contents Management Contents Management Contents Management Contacts Space Contacts Space to apply.	er 🚣 Loss OK Cancel
Contenta update Lifecycle	OK Cancel COV International Primetrica; Inc. I Week I Week I Week I Week	1 week 1 week

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

Cloud Shared Office	Contents Management Edit contents update notification		الد چي ۱۹	Naoki M Logout
Version management Compression with password	Detail Collabo Space Company Space Activation ✓ When add contents 1 week ✓ When update contents 1 week ✓ Creator Nacki Motosato Created Date 08/28/20 Updator Nacki Motosato Last Updated 10/02/20			
Contents update Lifecycle	Enable individual settings Space Nam Space CSO Europe Corporation Collabo Space > CSODEMO Global Co., Ltd. > CSO Europe Corporation CSO EUROPE QUARTERS	When add contents	When update contents 1 week	Delete
	Collabo Space > CSODEMO Global Co., Ltd. > CSO Europe Corporation > CSO France Co., Ltd Collabo Space > CSODEMO Global Co., Ltd. > CSO Europe Corporation >	1 week	1 week 1 week	

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.

Revision History

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