



CTERA PORTAL CLOUD DRIVE FAQ

WHAT ARE THE BENEFITS OF THE CTERA PORTAL CLOUD DRIVE?

Use the CTERA Portal Cloud Drive to securely manage your files, share them and collaborate with your colleagues; All from one place.

You can upload and download folders and files to the CTERA Portal Cloud Drive and securely share these folders and files with your team members. In addition, you can copy or move files in the cloud and edit them.

HOW DO I ACCESS MY CTERA PORTAL CLOUD DRIVE?

You log on to your drive in a browser using the following address:

`https://portal/ServicesPortal`

where *portal* is the DNS name or IP address for the portal.

Enter your user name and password to access the portal.

The first time you sign in to the portal, a short tutorial starts, to guide you through using your portal.

HOW DO I RECOVER MY PASSWORD?

If you forgot your password, contact your administrator.

HOW DO I CHANGE MY PASSWORD?

To change your password, contact your administrator.

HOW DO I CHANGE THE INTERFACE'S LANGUAGE?

The interface's language can be set in two places:

Either, from the sign in page or from your profile settings in your CTERA Portal Cloud Drive:

- 1 Click your avatar or initials in the upper-right corner and then in the menu click **MY PROFILE**.
- 2 Select the desired language in the **Language** drop-down list.

HOW DO I KNOW HOW MUCH SPACE I HAVE?

You can always check how much space is used by looking at the bottom left corner of your CTERA Portal Cloud Drive.

WHERE CAN I GET A GUIDE FOR THE SERVICE?

The complete end user guide is available online or as a PDF available from your administrator.

- 1 Click your avatar or initials in the upper-right corner and then in the menu click **Help**.
- 2 Select **Online Help** to open the help in a new browser window.

HOW DO I UPLOAD FILES TO MY CTERA PORTAL CLOUD DRIVE?

You can upload folders and files by dragging and dropping them or by uploading them.

- Drag the folders and files from your PC to the browser window.
Note: You can only drag folders when using a Chrome browser.
- Or,
Note: You can only upload files and not folders using this option.
 - a Click on your **My Files** folder. The **My Files** page is displayed.
 - b Click **New** and choose **Upload File**.
 - c Select the files on your PC that you want to upload and click **Open**.

HOW DO I CREATE A NEW FOLDER?

You can add new folders to your CTERA Portal Cloud Drive.

- 1 Navigate to the parent folder, under which you want to create a new folder.
- 2 Click **New** and choose **New Folder**.
- 3 Give a name for the folder and click **Create**.

The following reserved words cannot be used for a folder name:


- PreviousVersions
- Shared With Me
- Backups
- Shared By Me
- Users
- share
- backups
- backupFolders
- cloudDriveFolders
- invitations

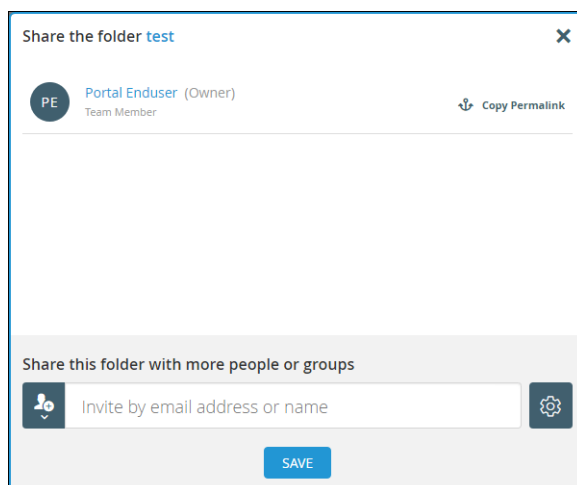
HOW DO I SHARE A FILE OR A FOLDER?

You can invite co-workers, external users, or groups of users to collaborate on a folder or file with you. Collaborators receive an email notification inviting them to collaborate on the project. They can then view or edit files in the project and add files and folders to the project, depending on their permissions.

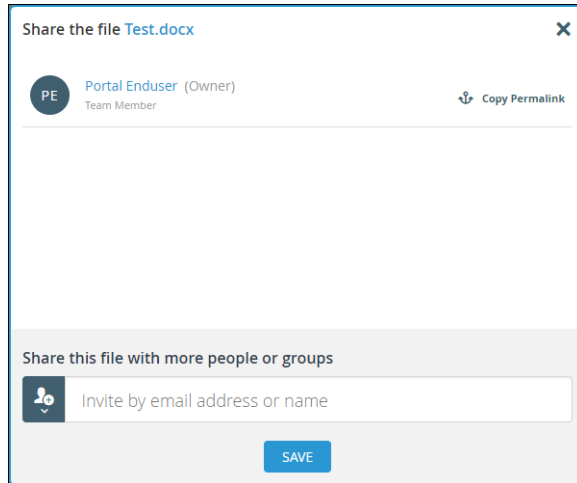
Shared folders are presented to collaborators with the name of the folder owner as part of the name. The storage consumed when sharing a folder with other users is taken from your storage quota. Team projects are shared equally by the collaborators and therefore your name is not displayed as the owner as part of the folder name. So that you can create a team project that does not use personal storage, you can request from a portal administrator that a folder in the cloud drive be a team project with the storage allocation taken from the storage provisioned for that team portal and not from your storage quota.

To share a file or folder:



- 1 Select a file or folder in your cloud drive and click the **Share this folder/file** icon . If the file or folder is owned by you, the following **Share** window is displayed.

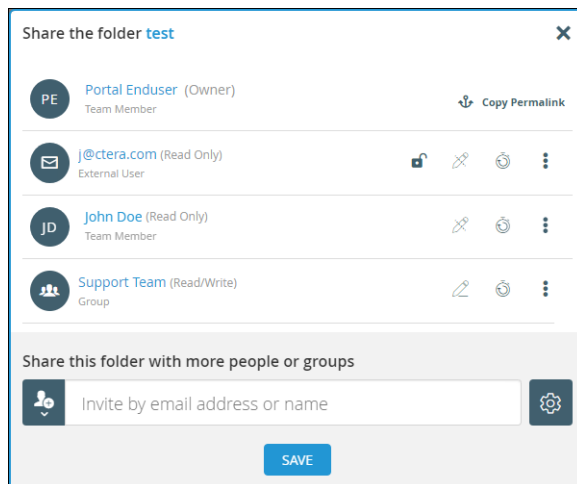


If the file or folder is under **Shared With Me**, the following **Share** window is displayed.




In this case, you cannot configure project settings, described in step 5.

- 2 Select whether to invite a single user  or group .
- 3 Enter the user or group to invite: an email address, user name, or user group name. Users that you frequently share with will be auto-completed after you type only a few characters of the name or email.






- 4 You can manage the collaborator permissions.


- Click  and choose the relevant permission as *No Access*, *Preview Only*, *Read Only* or *Read/write*.

Note: This icon varies depending on default permissions level. For example, the preview icon is displayed for the *Preview Only* permission level.

When you share a folder, all the files in the folder inherit the folder permission. If you share individual files in the folder, and change the permission to override the inherited permission, including to mark some files as *No Access*, the files are still accessible via the parent folder. The override permissions only apply when attempting to access the file as a separate share.


Preview Only share recipients are able to view the file using the portal's integrated document preview server. Users with this permission are unable to download, copy, or print the file.

- Configure an expiration date for the collaborator, by clicking .
- Remove a collaborator, by clicking  and then **Remove**.
- For external users defined by email, define authentication settings such as email or SMS verification for increased security, by clicking . The user receives a verification code and must use this code within 30 minutes before it expires.

5 If the file or folder is not under **Shared With Me**, configure project settings by clicking  and select the options you want:

- **This is a team project** – The folder is a team project. The folder is displayed in co-workers **Shared with Me** folder without your name. The storage used for this folder is taken from your storage allocation, unless the folder is requested from an administrator to use team storage, as described in [Requesting a Team Project Using Team Storage](#).
- **Allow team members to reshare this folder/file** – The folder/file can be reshared by other team members. If you do not want this folder/file reshared with additional people, clear this check box.
- **Allow team members to sync this folder** – The folder can be synced to the computer of other team members. This option is only available for top-level folders.

Note: If the file or folder is under **Shared With Me**, you can leave the shared file or folder by

clicking  and selecting **Leave shared folder** and then confirming that you want to leave the share.



6 Click **SAVE**.

After sharing a file, the collaborator icon next to the file changes to green .

After sharing folder file, the folder icon changes to green .

An email is sent to the collaborators inviting them to access the file. Emails are also sent to Active Directory group members that are included in a collaboration.



- If the email recipient has a portal account, a team member, clicking the link in the invite goes to the item in the portal. If the user is not logged in to the portal a login window is displayed, otherwise the file or folder is displayed.
- If the email recipient does not have a portal account, an external user, clicking the link in the invite opens displays the file of the folder in a browser.

Clicking the  link opens the **Share** window, where you can change the settings, as described above starting with step 4. An additional option is available to resend an invitation, by clicking  and then **Resend**.

HOW DO I RECOVER A FILE OR FOLDER I DELETED BY MISTAKE?

Your deleted files are retained by cloud drive for a retention period that is defined by your portal's administrator. If you have deleted a file by accident, you can view and restore it.

To show deleted items:

- 1 In the **My Files** folder, right-click the options icon  and select **Show Deleted Items**. All deleted files are displayed in gray with a cross-out line through the filename.
- 2 Select the files you want to restore, then click the **Undelete** icon .

To hide deleted items:

- Right-click the options icon  and select **Hide Deleted Items**.

I MODIFIED A FILE, IS IT POSSIBLE TO SEE THE FILE'S PREVIOUS VERSION?

The CTERA Portal keeps snapshots of all changes made in your files. The number of versions and the time period for which they are retained depends on the retention policy defined by your portal administrator.

You can recover whole folders or individual files or both folders and files, described in full in the online documentation or PDF available from your administrator.

HOW CAN I SEE FILES AND FOLDERS THAT WERE SHARED WITH ME?

The **Shared With Me** folder contains all of the content that other users shared with you.

Note: If no folders nor files are shared with you, this option is not displayed.

In this example, there are a number of shared folders including a folder called *Templates*, that the user called *Share User* shared with you. There is also a .pdf shared with you. The *Templates* folder has read and write permission but the PDF file only has read only permission. The person who shared these files decides the permission.

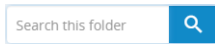
Note: If you share the file with another user, you cannot share with more permissions than you have. For example, you can share your own files or a file shared with you, with *Read/Write* permission as *Read/Write*, *Read Only* and *Preview Only*. However, you can only share a file shared with you, with *Read Only* permission as *Read Only* or *Preview Only* and not as *Read/Write*.

The additional *No Access* permission is used when you share a folder and want to exclude specific files in the folder, rather than starting to share the files individually.

HOW CAN I SEARCH FOR FILES AND FOLDERS?

You can search for files in a folder.

- 1 In the **Search this folder** box, type part or all of the filename you want to search for.



The search is performed in the current folder and its sub-folders.
The matching files are displayed.

- 2 To clear the search, click  next to the **Search this folder** box or clear the contents of the box.

Note: A time out message is displayed when a search takes too long and the search stops.