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 SECURE IS THE CTERA PORTAL CLOUD DRIVE?

CTERA offers military grade security. CTERA uses a patented protocol (communication means) to connect between edge devices (remote laptops, smartphones etc.) and the file servers (local data centers or public clouds such as AWS).

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, click **Forgot your password** in the sign in page and an email is sent to reset the password. Alternatively, the administrator can configure a new temporary password.

HOW DO I CHANGE MY PASSWORD?

To change your password:
1   Click your avatar or initials in the upper-right corner and then in the menu click **MY PROFILE**.
2   Click **Change Password**.

3   Enter your existing password and then the new password you want and confirm this new password.

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, as follows:

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 share files and folders in the following ways:

Using a Public Link – The file or folder is shared with internal and external users without the user requiring and authentication to access the file or folder.

Creating a List of Collaborators – You can also share a file for joint collaboration on the file, where any changes made by one user to the file are available to all the file collaborators.

Using a Permalink – To access the shared file or folder, collaborators must drill-down all the way from the root folder to the specific file or folder, which can be mean going down many folder levels and searching for a file in a folder with many files. Using a *permalink* to the file or folder provides collaborators with a direct link to the shared file or folder.

Using a Public Link

You can share a public link to any file or folder in the cloud drive.

To create a public link:

1   Select a file or folder in your cloud drive and click the **Link** icon 🔗 .
     The **Public Link to** window is displayed.

2   Click **Create new link**.
     The **Public Links** window is displayed, with the link to the folder or file.
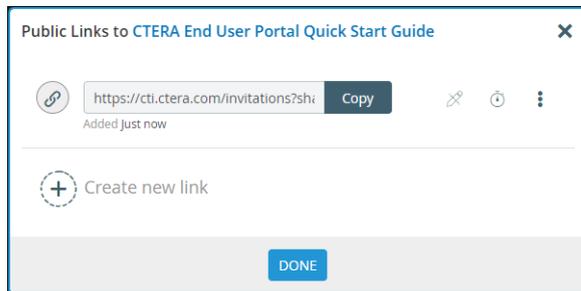
3 You can manage the link.

- Configure the file permissions as *Preview Only*, *Read Only* or *Read/write*, by clicking .

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

  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 link, by clicking .

- Remove an existing link, by clicking and then **Remove**.
- Create additional links to the file, by clicking **Create new link**.
- Copy the link to your clipboard by clicking **Copy**. Then send it via email to people with whom you want to share the file.

4 Click **DONE**.

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

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

Clicking the link opens the **Public Links** window, where you can change the settings, as described above in step **3**.

An external user that receives an email invitation with a file link can click on the link to open a browser to access the file. An external user that receives an email invitation with a folder link can click on the link to open a browser window which lists all the files and folders in the shared folder.

Note: If the file is identified as a sensitive file, any attempt to view or download the file is blocked and an error message is displayed.

Creating a List of Collaborators

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

*   **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**.

Using a Permalink

To enable collaborators to access the file or folder directly, the owner can supply a *permalink* to the file or folder so that the collaborators have a direct link to what they need.

Every file and folder under the root folders in the cloud drive in the portal is assigned a permanent link that can be used to directly access the file or folder.

Note: When using a public link, the user also has direct access to the file or folder. However, when public links are disabled, this ability is no longer available.

When using a permalink:

- The collaborator has direct access to the file or folder without having to drill-down from the top level of a share.

- The file or folder can renamed and even moved to another location under the same cloud drive root folder and it will still be accessible using the *permalink*.

- The access permission set for each collaborator is applied to the collaborator when using the permalink.

- The expiration date set for each collaborator is applied to the collaborator when using the permalink.

After a user is defined as a collaborator for a file or folder, as defined in Collaborating on Files, the file or folder owner can send a permalink for that collaborator to use to access the file or folder.

Users who are defined as collaborators for the file or folder can then use the permalink to access the file or folder.

To create and use a permalink:

• Select a file or folder under any root folder in the cloud drive and click the **Copy Permalink** icon
⚓.

   Note: Permalinks are not assigned to backup files and folders.

The permalink is copied to the clipboard and it can then be sent to collaborators to access the file or folder.

The user either signs in, or enters an email address that was defined as a collaborator. A user with an account is logged in and the file or folder is displayed. An external user is sent a verification code which is entered in the displayed window to enable access to the share. The verification code must be used within 30 minutes, before it expires.

Note: If access to the portal is via SAML single sign-on, the sign in screen is different and a user with an account just clicks the **SIGN IN** button. If access to the portal is with a Common Access Card (CAC) external users cannot use the permalink.

The share is displayed in a browser window.

An external user that receives an email invitation with a folder link can click on the link to open a browser window which lists all the files and folders in the shared folder.

Dependent on the file type, and the permission assigned to the collaborator, files can be edited and both shared files and folders can be renamed and moved within the same cloud folder and still be accessed by the permalink.

Note: The permission and expiration date set for each collaborator are applied to that collaborator using the permalink.

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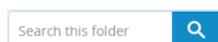
The search is performed in the current folder and its sub-folders.
The matching files are displayed.

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.