

## **Help Hierarchy / TOC**

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## Cloud Portal Office Desktop

Cloud Portal Office is a cloud-based document management system providing you with “anywhere access” to your business documents. Cloud Portal Office Desktop is a desktop synchronization utility that allows you to access and edit your Cloud Portal Office documents directly from your desktop, even when you are offline. It includes the following key features:

- Maintain a local copy of all files in selected folders
- Synchronize file changes between the desktop and the Cloud Portal Office server
- Manage files and folders including create, edit, and delete using standard Windows and Mac features
- Automatically version updated files and identify conflicts

## Service Restrictions

Cloud Portal Office Desktop has the following restrictions:

Item	Restriction
Maximum number of synchronized desktops	3 desktops per user <i>Note: you can manually link and unlink devices via the Cloud Portal Office Web Interface</i>
Maximum number of users per desktop	1 user per desktop
Synchronized Folders	Selected folders for synchronization apply to all desktops associated with the user; desktop-specific folder selection is not supported
File formats supported	Any file type; native application must be available on your system to open the file

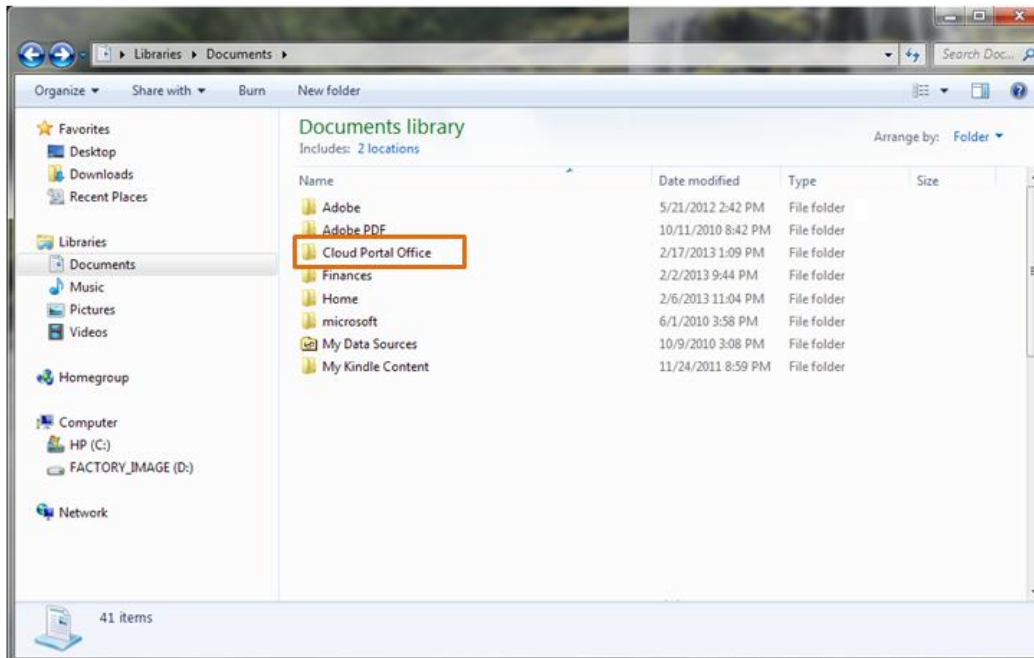
## Configuring Cloud Portal Office Desktop

Once you have installed Cloud Portal Office Desktop, you need to complete the initial configuration. To configure Cloud Portal Office Desktop:

1. Launch Cloud Portal Office Desktop, if necessary.  
*(Note: it should launch automatically after installation).*
2. Enter your **username** and **password**; then click the **Login** button.
3. Upon successful authentication, the login screen is updated with your current storage status and the Next button becomes enabled. Click **Next** to start the configuration wizard.
4. Choose a Setup Type and click **Next**. “Typical” setup sets the root folder for synchronization to the default value (Documents library for Windows and your root directory for Mac) and synchronizes all folders in My Docs and Others Docs from the Cloud Portal Office server. “Advanced” setup allows you to change the root folder location and select folders to synchronize.
5. A quick tutorial is displayed. Click **Next** on each screen to continue, or click **Skip Tour** to bypass the tutorial and complete the wizard.
6. Click **Finish** to close the wizard. Cloud Portal Office Desktop setup is complete and your Cloud Portal Office files will begin synchronizing with your desktop automatically.

## Accessing Cloud Portal Office Files

Cloud Portal Office Desktop is an application that runs in the Windows System Tray or Mac Menu Bar and synchronizes Cloud Portal Office files with a designated folder on your system. The desktop software allows you to manage and edit Cloud Portal Office files in Windows Explorer or Mac Finder, just as you would any other file on your hard disk or network drives.



You can perform all standard file and folder operations including:

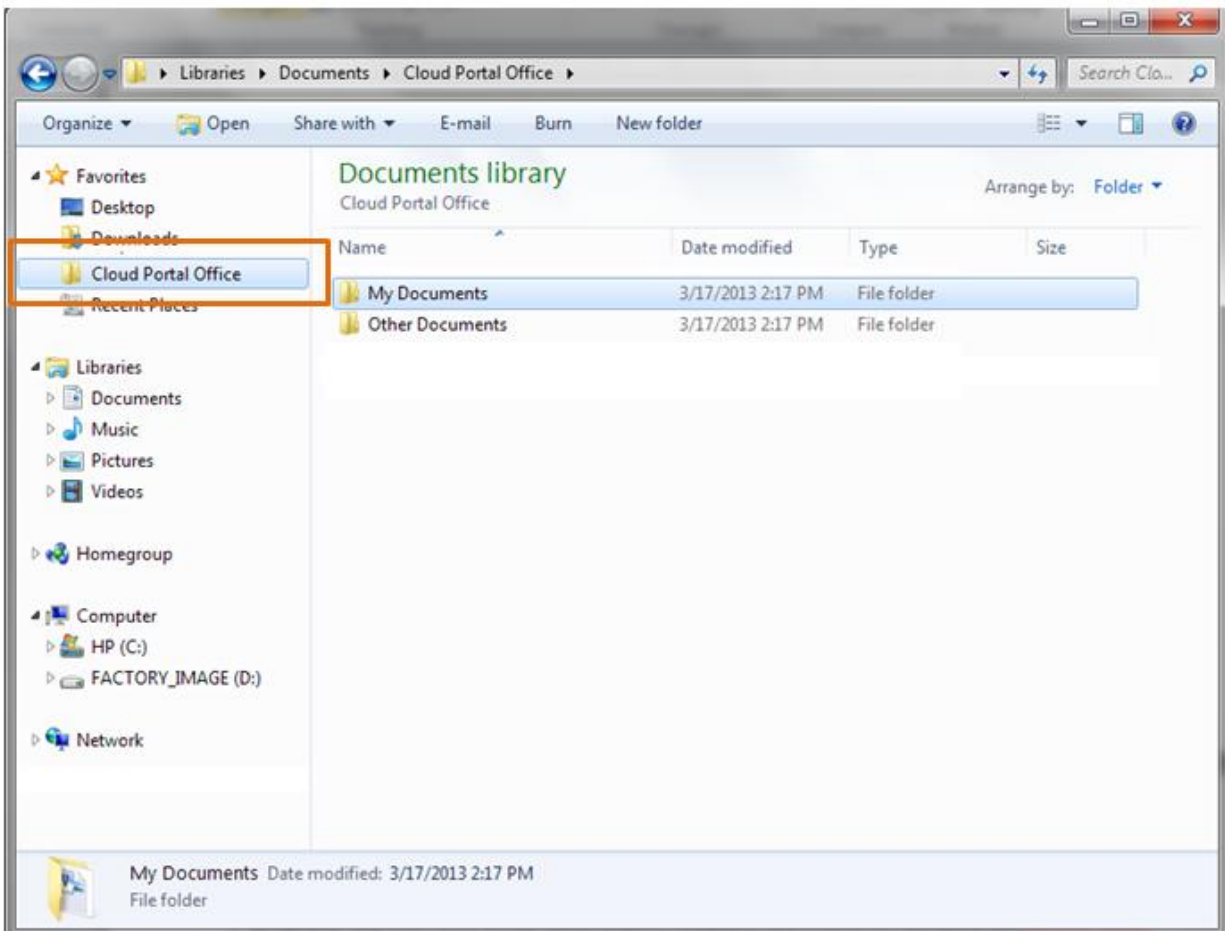
- Browse
- Search
- Create (via drag-and-drop, copy and paste, or the operating systems New feature)
- Edit (updated file is automatically saved as a new version)
- Rename
- Delete (file or folder is moved to local and Cloud Portal Office trash)
- Move (if a document is moved outside of the Cloud Portal Office folders, it will be deleted from the server)
- Copy & Paste

Any changes made to files or folders via the desktop are copied to the server during synchronization, and vice versa.

## Accessing the Cloud Portal Office Folder

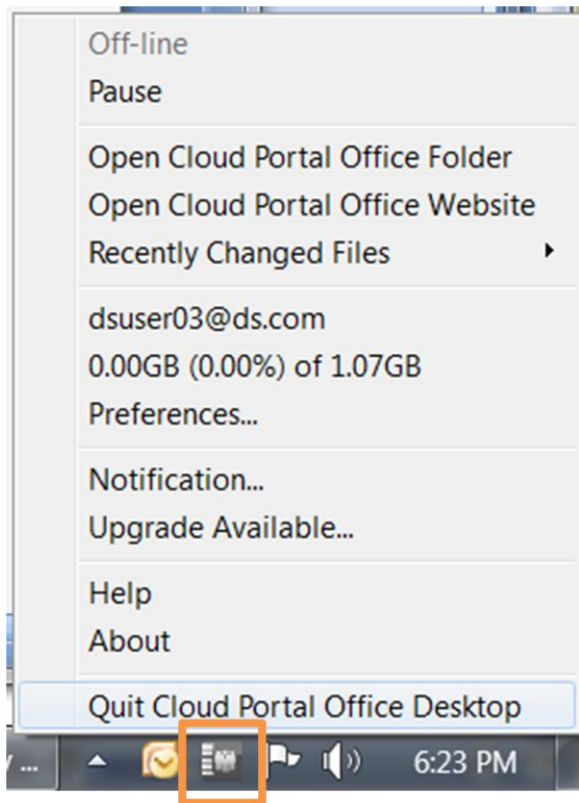
By default, the root Cloud Portal Office folder is located in Documents for Windows and your home directory for Mac. You can change this location during configuration or through the Preferences dialog. See Configuring Cloud Portal Office Desktop for details.

To quickly access the Cloud Portal Office folder in Windows, a shortcut is automatically added to Favorites.



## Working with Cloud Portal Office Desktop

Cloud Portal Office Desktop is a Windows System Tray or Mac Menu Bar application that is automatically started and always running in the background. It synchronizes Cloud Portal Office files with your desktop and provides menu options through the System Tray or Menu Bar.

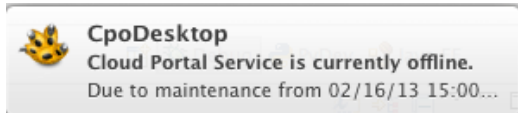


The menu includes the following items:

Item	Description
Synchronization Status	Displays current status (Running, Paused, All Files Up to Date, Offline, Not Connected, Unavailable)
Pause/Resume Switch	Select this item to pause or resume synchronization
Open Cloud Portal Office Folder	Opens the root folder (Cloud Portal Office) on your system where files are synchronized
Open Cloud Portal Office Website	Opens the Cloud Portal Office web interface in your default web browser
Recently Changed Files	Displays a list of the last four files synchronized for selection
Username	Read-only field showing the currently logged-in user
Storage Status	Read-only field showing current storage usage
Preferences	Opens configuration options dialog
Notification	Display system maintenance notifications
Help	Opens help pages with detailed instructions for using

	Cloud Portal Office Desktop
About	Opens a dialog box with copyright information and version number
Quit	Closes Cloud Portal Office Desktop; to restart the application, select it from the Windows Start menu or the Mac Applications folder

*Note: when server maintenance is being performed, the following message is displayed:*



## Configuring Cloud Portal Office Desktop

The Preferences dialog contains all configuration options for Cloud Portal Office Desktop including:

- General settings (notifications and startup options)
- Account settings (logged in user and server URL)
- Network settings (connection options)
- Advanced settings (synchronization and logging)

To modify Preferences:

1. Open the Cloud Portal Office Desktop menu. (For Windows, right-click on the Cloud Portal Office Desktop icon in the System Tray. For Mac, click on the Cloud Portal Office Desktop icon in the Menu Bar.)
2. Select **Preferences...** from the menu to open the Preferences dialog box.
3. Select the desired tab and modify settings. See the tables below for details on each setting.
4. Click **Apply** to close the dialog and save your settings.

### General Settings

The General Settings tab includes the following options:

Setting	Description	Instructions
Show Notifications	Specifies whether pop-up notifications are displayed when files are changed	1. Check box

	<p><i>Note: notifications are only displayed for changes made remotely (not on your desktop)</i></p> <p>Checked = pop-up notifications are displayed</p> <p>Unchecked = pop-up notifications are not displayed</p>	
Start Cloud Portal automatically	<p>Specifies whether Cloud Portal Office Desktop automatically launches when you start your computer</p> <p>Checked = application is automatically started</p> <p>Unchecked = application is not automatically started; you must manually launch it from the Windows Start Menu or Mac Dock</p>	1. Check box
Show file sync status icons	<p>Specifies whether icons are displayed by each file indicating synchronization status</p> <p>Checked = icons are displayed</p> <p>Unchecked = icons are not displayed</p> <p><i>Note: this setting applies to Windows only</i></p>	1. Check box

## Account Settings

The Account Settings tab includes the following options:

Setting	Description	Instructions
Account	Displays the name of the configured user account and a button to Sign-In/Out	<p>To Sign-Out:</p> <ol style="list-style-type: none"> <li>1. Click the Sign-Out button</li> <li>2. You are signed out of Cloud Portal Office. The synchronization status is changed to Not Connected, the icon changed to black and white, and your desktop is unlinked on the Cloud Portal Office web interface.</li> </ol> <p>To Sign-In:</p> <ol style="list-style-type: none"> <li>1. Click the Sign-In button to display the login dialog box</li> </ol>



		<ol style="list-style-type: none"> <li>2. Confirm the server URL and enter your username and password</li> <li>3. Click OK to close the dialog box</li> <li>4. Click Apply to complete login</li> <li>5. You are signed in to Cloud Portal Office and synchronization starts automatically</li> </ol>
Computer Name	Displays the name of your computer	Read-only
Storage Used	Displays the amount of storage currently used and the total storage available	Read-only

## Network Settings

The Network Settings tab includes the following options:

Setting	Description	Instructions
Use Proxy Server	Option to connect to Cloud Portal Office server using the specified proxy server	<ol style="list-style-type: none"> <li>1. Select the radio button</li> <li>2. Click the Proxy Config button to open the proxy dialog</li> <li>3. Enter the proxy server address and port number</li> <li>4. If authentication is required, check the authentication checkbox and enter a username and password</li> <li>5. Click Apply to save the proxy settings and close the dialog box</li> </ol>
Auto-detect	Option to connect to Cloud Portal server using the proxy server already configured (in IE for Windows or network configuration for Mac)	<ol style="list-style-type: none"> <li>1. Select the radio button</li> </ol>
Direct Connection	Option to connect to Cloud Portal Office server directly without using a proxy server	<ol style="list-style-type: none"> <li>1. Select the radio button</li> </ol>

## Advanced Settings

The Advanced Settings tab includes the following options:

<b>Setting</b>	<b>Description</b>	<b>Instructions</b>
Folder Location	Root folder on your system where Cloud Portal Office files are synchronized	<ol style="list-style-type: none"> <li>1. Click the Change... button to open a file browser dialog box</li> <li>2. Browse your system and select a folder</li> <li>3. Click Choose to save the location and close the dialog box</li> </ol>
Enable Logging	Specifies whether Cloud Portal Office Desktop should maintain a log for support	<ol style="list-style-type: none"> <li>1. Check the logging checkbox</li> <li>2. Click the Change... button to open a file browser dialog box</li> <li>3. Browse your system and select a folder</li> <li>4. Click Choose to save the logging location and close the dialog box</li> </ol>
Folders to Synchronize	Specifies folders to be synchronized between desktop and Cloud Portal Office server	<ol style="list-style-type: none"> <li>1. Click the Select... button to open the folder dialog box</li> <li>2. A list of folders available on Cloud Portal Office is displayed. Check the boxes next to each folder you wish to synchronize. Use the arrow icons to expand and contract sub-folders</li> <li>3. Click OK to save the synchronization settings and close the dialog box</li> </ol>

## Synchronizing Cloud Portal Office Files

Cloud Portal Office Desktop automatically synchronizes files in the selected Cloud Portal Office folders. Any changes made to files via the desktop are copied to the server during synchronization; and vice versa.

Synchronization occurs periodically (every five seconds) in the background and automatically performs the following steps:



1. Display “Running” status in the System Tray or Menu Bar.
2. Identify changes to documents on the Cloud Portal Office server and perform the same changes to those documents on the desktop. Changes may include a document being created, updated, renamed, deleted or moved.
3. Identify changes to documents on the desktop and perform the same changes to those documents on the Cloud Portal Office server.
4. Identify conflicts where documents have changed on both the desktop and server. See the Versioning and Conflicts section below for details.
5. Update the synchronization icon overlay for each file and folder (if icons are enabled in Preferences).
6. Display a pop-up notification in the Windows System Tray or Mac Menu Bar with the number of files updated (or filename, if only one file is updated).

### Notes:

- *Temporary files created while editing a file are not synchronized with Cloud Portal Office*
- *Notifications are only displayed for changes made remotely (not on your desktop). Notifications are not displayed for files changed on your device that are synchronized to the server.*
- *Cloud Portal Office Desktop must be online and your user account must be under the device quota (3 devices) to perform synchronization.*

### Synchronization Status

Each Cloud Portal Office file and folder on your desktop includes an icon overlay to quickly identify its synchronization status as shown in the table below:

Icon	File Status	Description
	Synchronized	Folder/file is synchronized with Cloud Portal Office server
	In Progress/Update Pending	A change was detected between the desktop and Cloud Portal Office server. Synchronizing is in progress
TBD	Conflicted	Temporary icon shown when a conflict is

		detected. Once the conflict is resolved, icon will revert to synchronized
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## Versioning and Conflicts

Conflicts occur when the same document has been changed on the desktop and on the server before synchronization occurs. Cloud Portal Office Desktop identifies conflicts and performs the following operations:

- The local file on your system is renamed to “filename (user name, date).extension”
- The file on the server retains the original name “filename.extension”
- Both files (“filename.extension” and “filename (user name, date).extension”) are copied to the server and your local system.

You are then responsible for reconciling the conflict. You can delete one of the copies, rename one to an appropriate filename, or manually merge the two files together and create a new version.

While synchronizing files using the Cloud Portal Office Desktop, a new version of a file is created under the following circumstances:

- You update/save a file after one hour had lapsed since your last update/save
- You update/save a file that was last updated/saved by another user
- Another user updates/saves a file you created or updated/saved

To prevent excessive versioning, frequent updates, such as Microsoft background save, are not versioned.

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