# MANUAL

# Getting Started with the Cloudalize Platform

Cloudalize™

## DISCLAIMER

Due to software updates, the end-user experience of the software interface (including but not limited to software features, user interfaces, and interaction experiences) may differ from the interface presented in this manual. The software interface is subject to change.

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# Connecting to the Virtual Workspace

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# 1. HTML5 Browser or Native Workspace App?

If you are an **end-user** who logs in to Cloudalize for the first time, a pop-up window will open in which you can choose how you want to connect to our platform. For **admins**, this will appear after you navigate to "Desktops". You can select "HTML5 Browser" or "Native Workspace App" (*notice: download of the Citrix Workspace App is necessary*). We will explain the difference below.
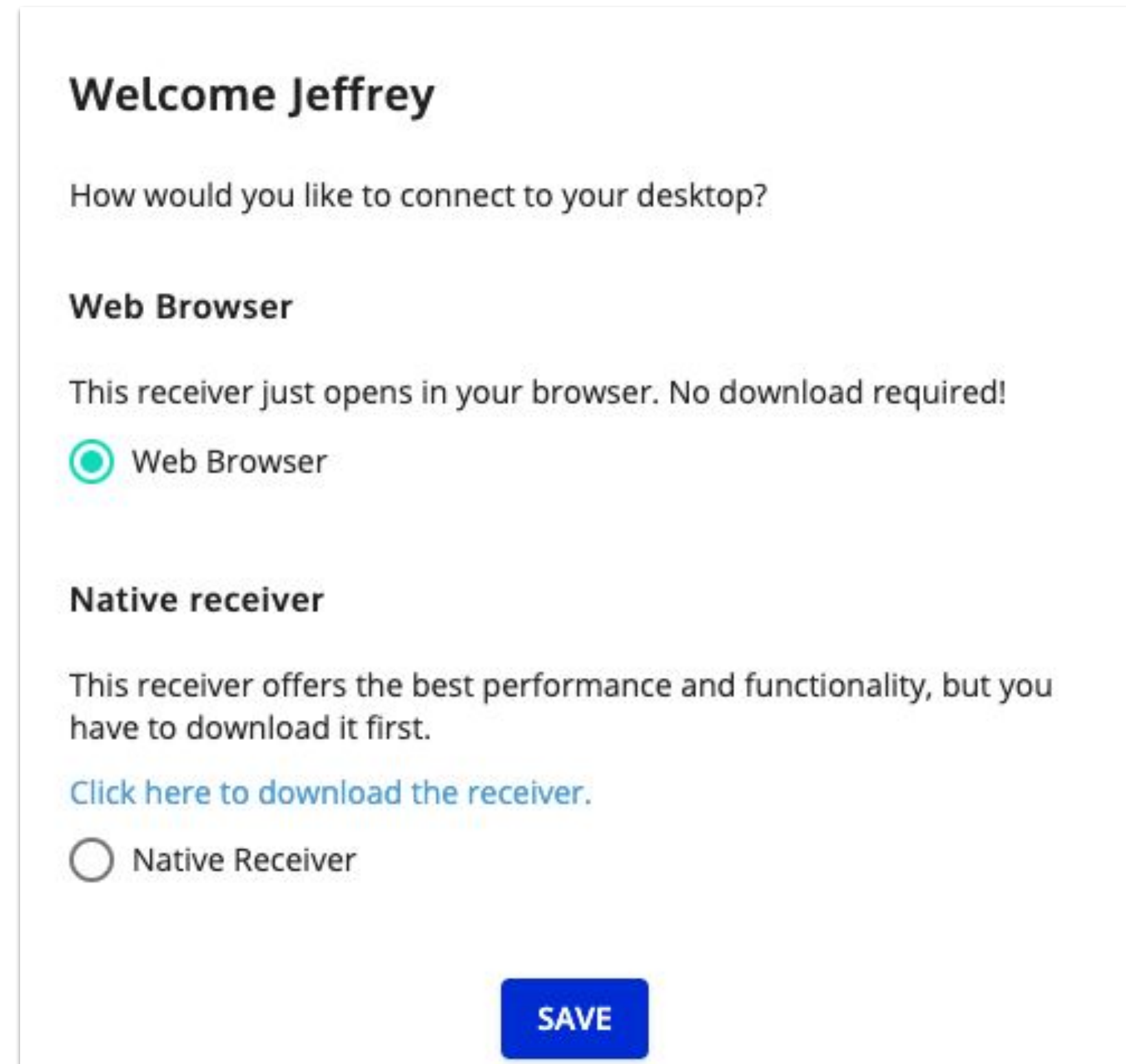
## 1.1 HTML5 Browser

You can access the Cloudalize platform by browsing to the following link:

- [Cloudalize for EU users](#)
- [Cloudalize for North-American users](#)

Cloudalize's platform can be accessed using one of the following supported HTML5 browsers*:

- Browsers based on Chromium: Chrome, Brave, Edge, Etc.;
- Browsers based on WebKit: Safari;
- Browsers based on Microsoft: Internet Explorer;
- Firefox;

*If a bug occurs in a browser not mentioned above, we do recommend using one of the supported HTML5 browsers.*

**Welcome Jeffrey**

How would you like to connect to your desktop?

**Web Browser**

This receiver just opens in your browser. No download required!

◉ Web Browser

**Native receiver**

This receiver offers the best performance and functionality, but you have to download it first.

Click here to download the receiver.

◯ Native Receiver

SAVE

*Figure: a pop-up window opens after first login to the platform*

## 1.2 Native Workspace App

For extended functionality and best user experience, we recommend installing the Citrix Workspace app. Using this is what we call the "Native Workspace App".

Have a look at page 22 on how to launch your desktop using the Native Workspace App.

**Welcome Jeffrey**

How would you like to connect to your desktop?

**Web Browser**

This receiver just opens in your browser. No download required!

◯ Web Browser

**Native receiver**

This receiver offers the best performance and functionality, but you have to download it first.

Click here to download the receiver.

◉ Native Receiver

SAVE

*Figure: a pop-up window opens after first login to the platform*

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# 2. Cloudalize App

The Cloudalize app is a native application. This means it is a software program that is developed for use on a particular platform or device. Because a native app is built for use on a particular device and its OS (in our case: Windows and macOS), it has the ability to use device-specific hardware and software.

Using the Cloudalize app has quite some advantages:

- Once logged in, you will not have to go through the login process again
- Never accidentally close the tab which is running your virtual desktop
- Automatic installation and updates of Native Workspace App component
- Multi-zone support for US and EU
- Devoted app for using your Virtual Desktop

## 2.1 Install on Windows

1. To download the installer, please click here.
2. The download will start automatically.
3. Double click the .exe file to start the installation
4. Once the installation is finished, enter your Cloudalize login credentials.
5. From now on, you can connect to your desktop from the Cloudalize app!



*Figure: double click the .exe file to start the installation*



*Figure: example of the Native app in Windows*

## 2.2 Install on macOS

1. To download the installer, please click here.
2. The download will start automatically.
3. Double click the .dmg file to start the installation.
4. Add the Cloudalize app to your Applications Folder.
5. Once the installation is finished enter your Cloudalize login credentials.
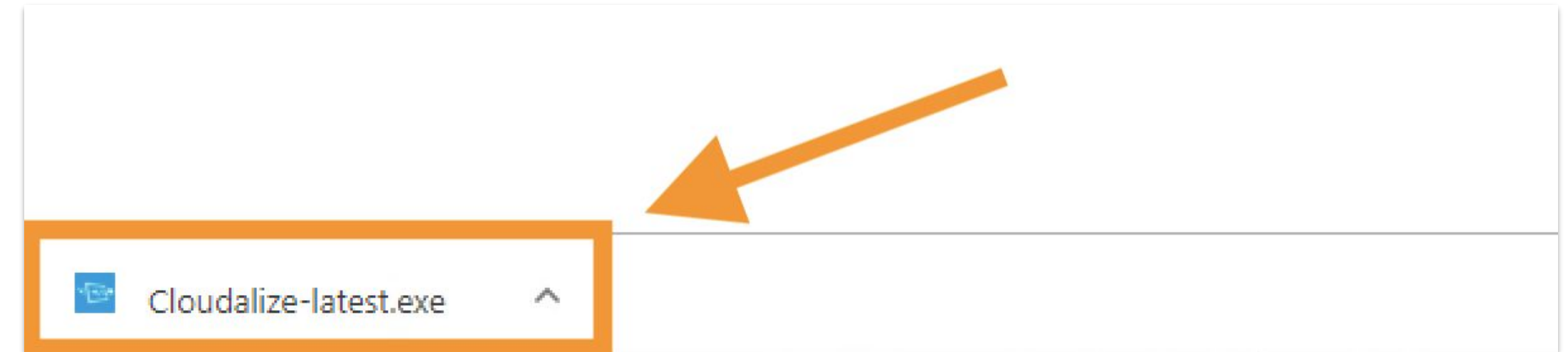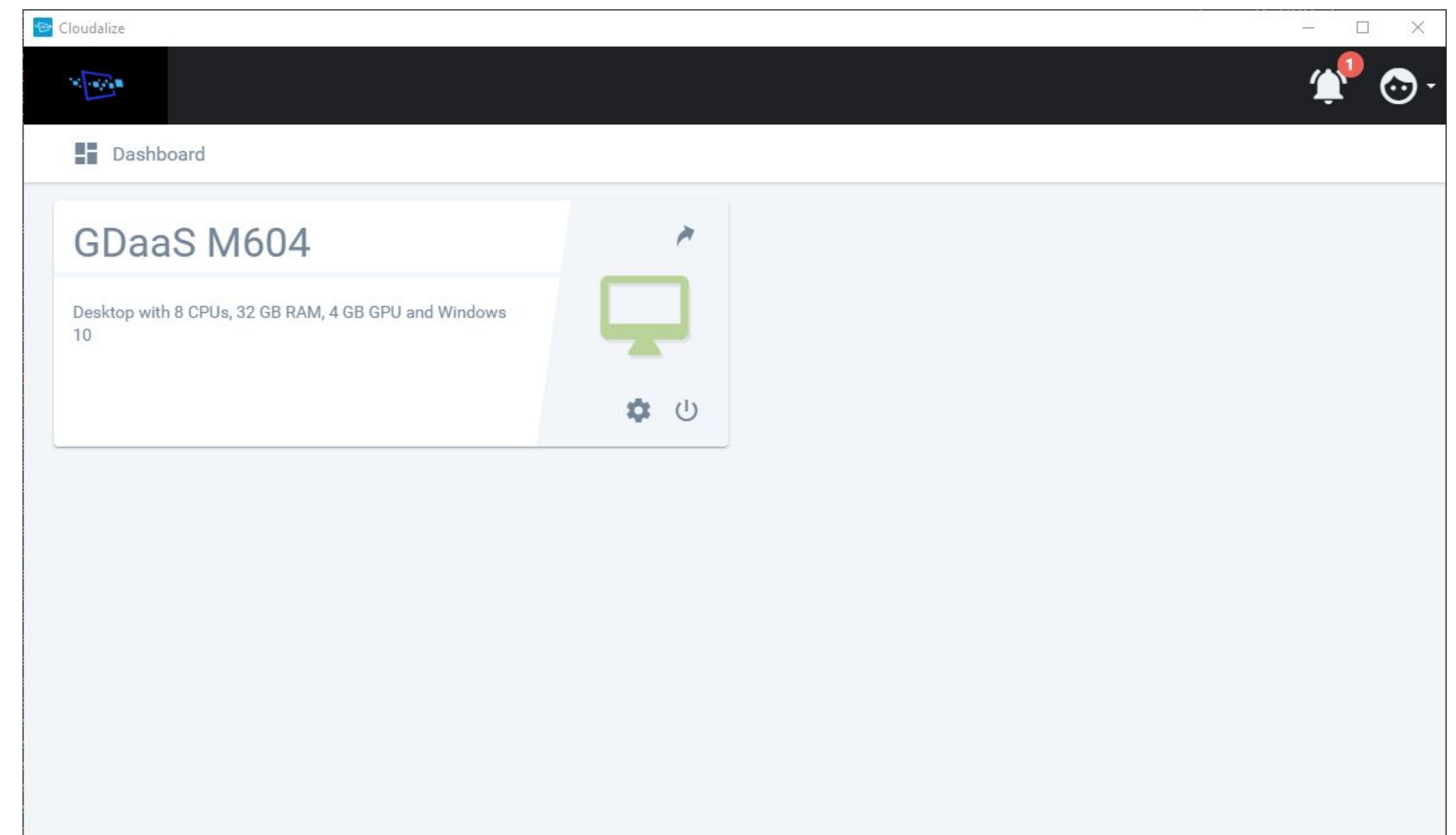6. From now on, you can connect to your desktop from the Cloudalize app!
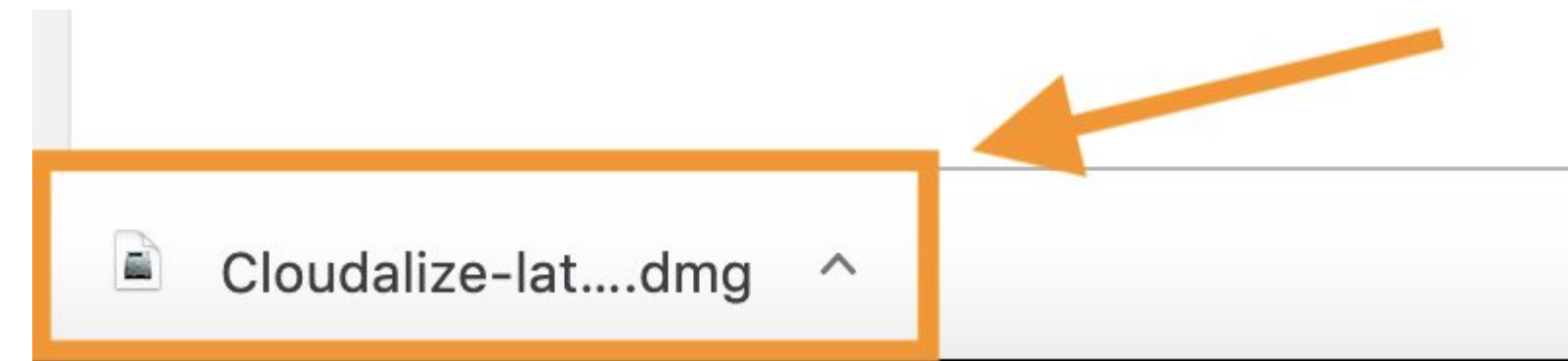


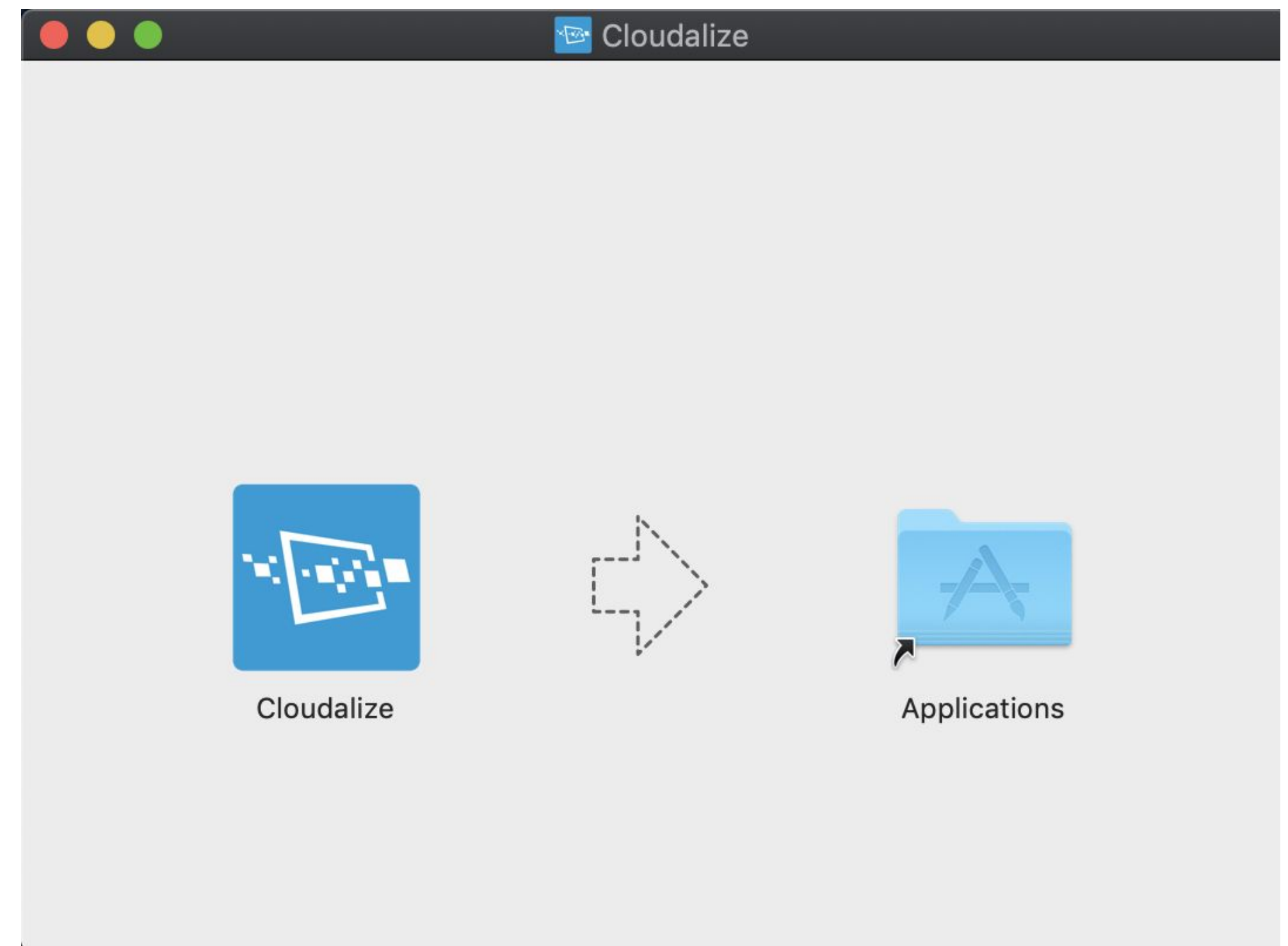*Figure: click the .dmg file to start the installation*



*Figure: add the Cloudalize app to your Applications folder*

# Pro tip: creating a shortcut to the Virtual Desktop

If you are looking for a way to leave the virtual desktop turned on 24/7 we recommend creating a shortcut. This allows you to connect to it in a single click.

To do this, you only have to click the 'add to launchpad button' above the desktop:
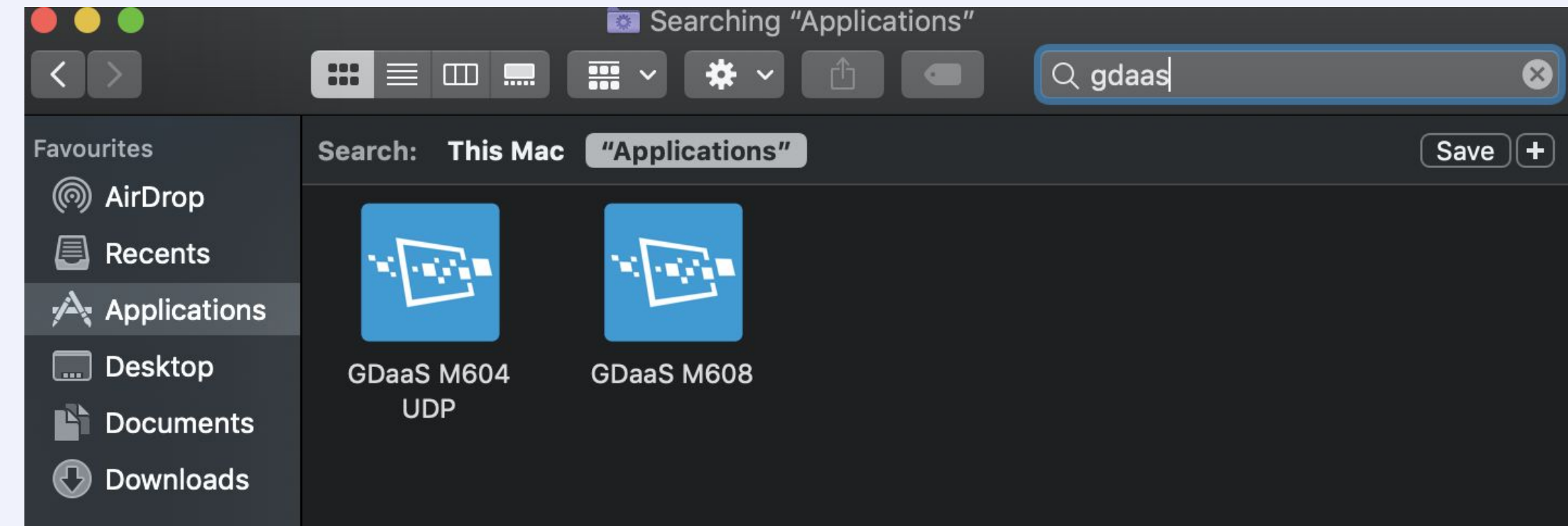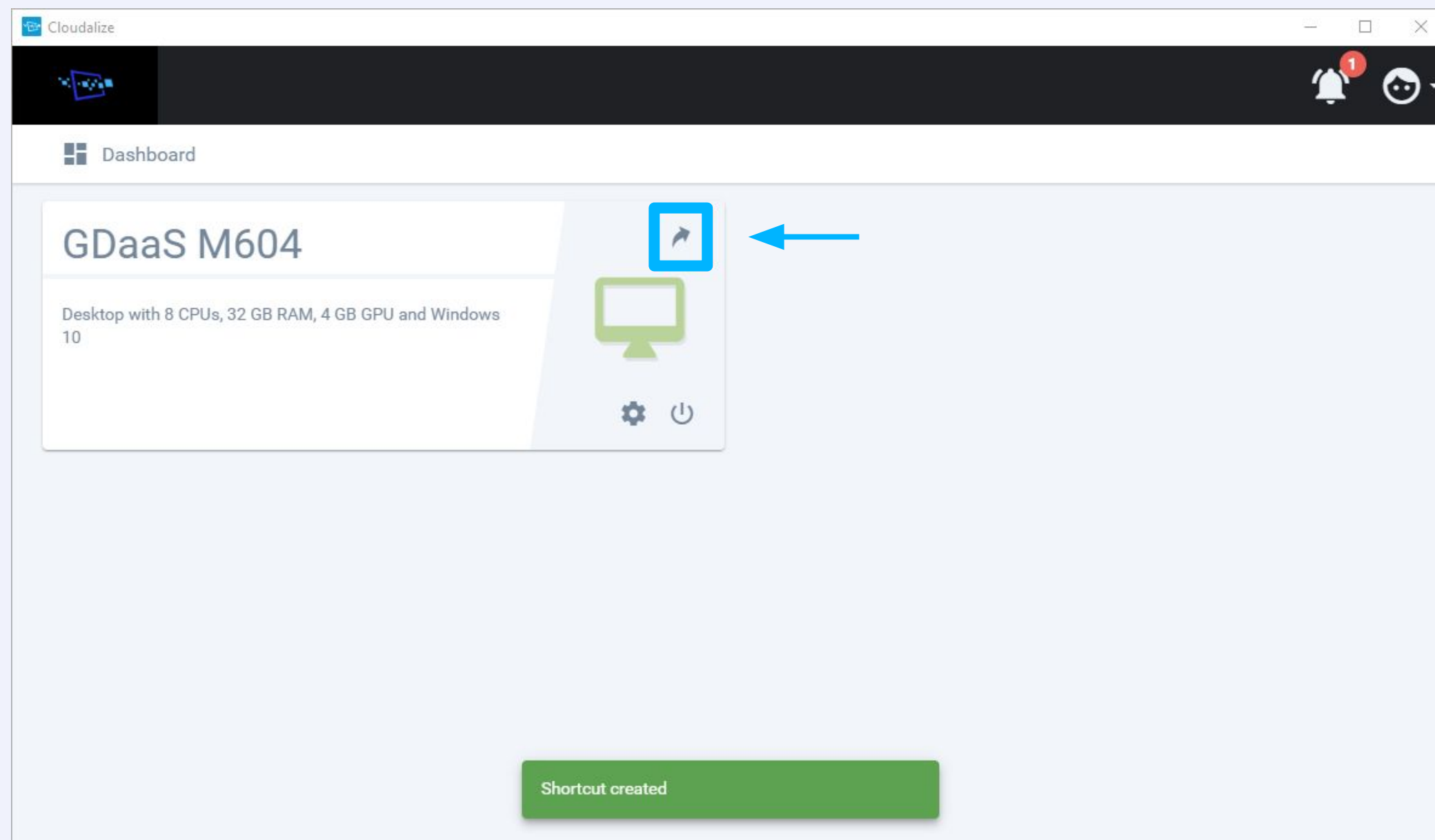


**macOS**: You can now find the shortcut in your "Applications" folder
**Windows**: You can now find the shortcut in your "Programs" folder.

You can now launch the desktop(s) from these shortcuts.

**Note**:  **this will not work unless the desktop is turned on**

# 3. User Level Connection Preference

It is possible for both admins and end users to change the connection preference at any time by following these steps:

1.  Select the profile icon in the global navigation on the left;

2.  At 'General' settings you can change the 'Connection Preference';

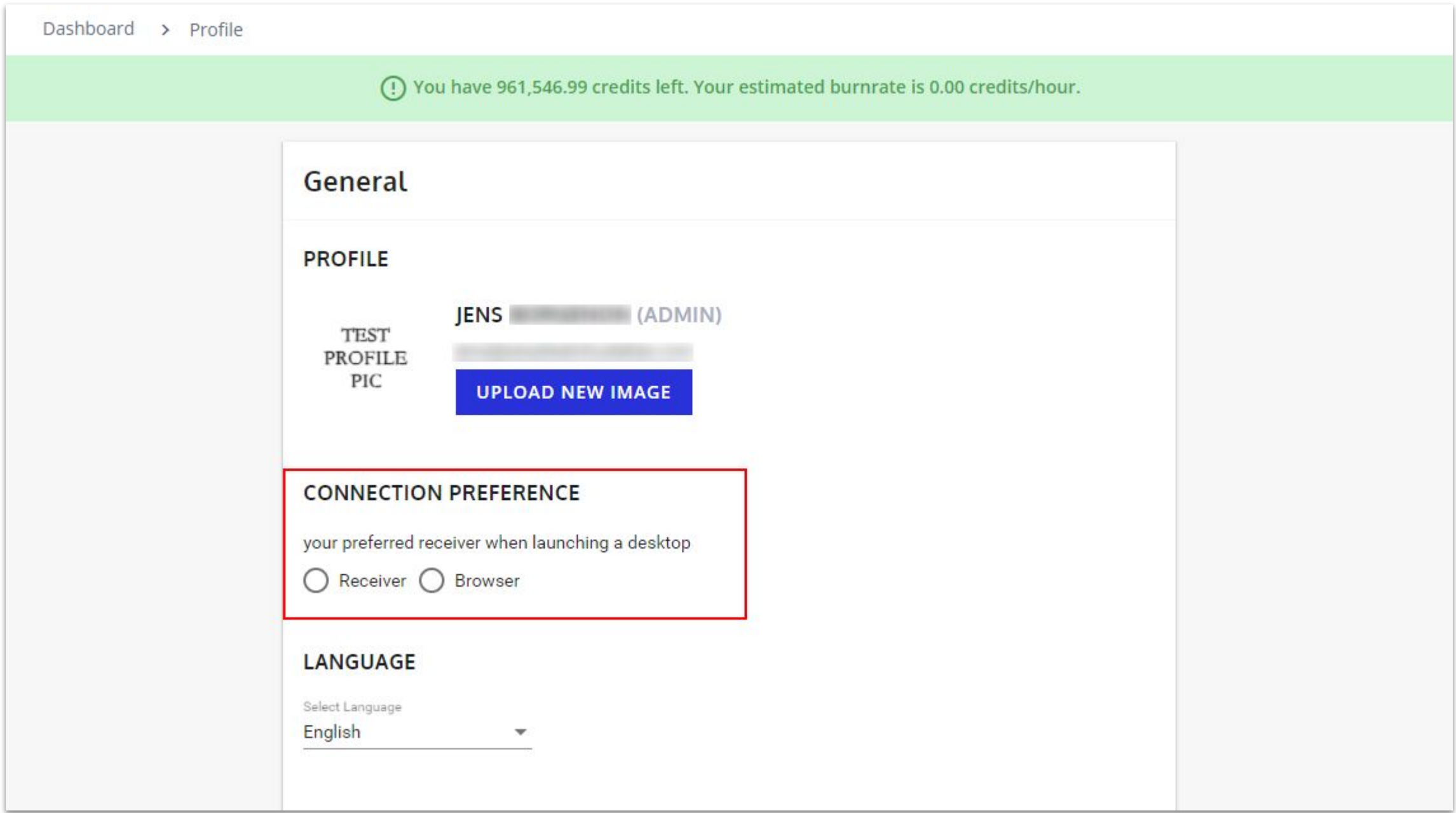3.  Click the 'Save' button to apply the changes



*Figure: change the Connection Preference in 'Profile → General Settings'*

**Caution!**

If you opted "HTML5 Browser" at first and you would want to change to "Native Workspace App" afterwards, you will have to download the Citrix Worskpace App.

Please use following link: https://www.citrix.com/downloads/workspace-app/

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# 4. Administrator Connection Preference

As an admin, you can change the connection preference for the company and lock this if you do not want your users to be able to modify this:

1. Select the "Settings" icon in the global menu on the left

2. Having the "Personalisation" tab open, scroll down to "Connection"

3. Optional: tick the box in front of "Force All Users To use The Chosen Default Receiver"

4. Click the "Save" button to apply the changes

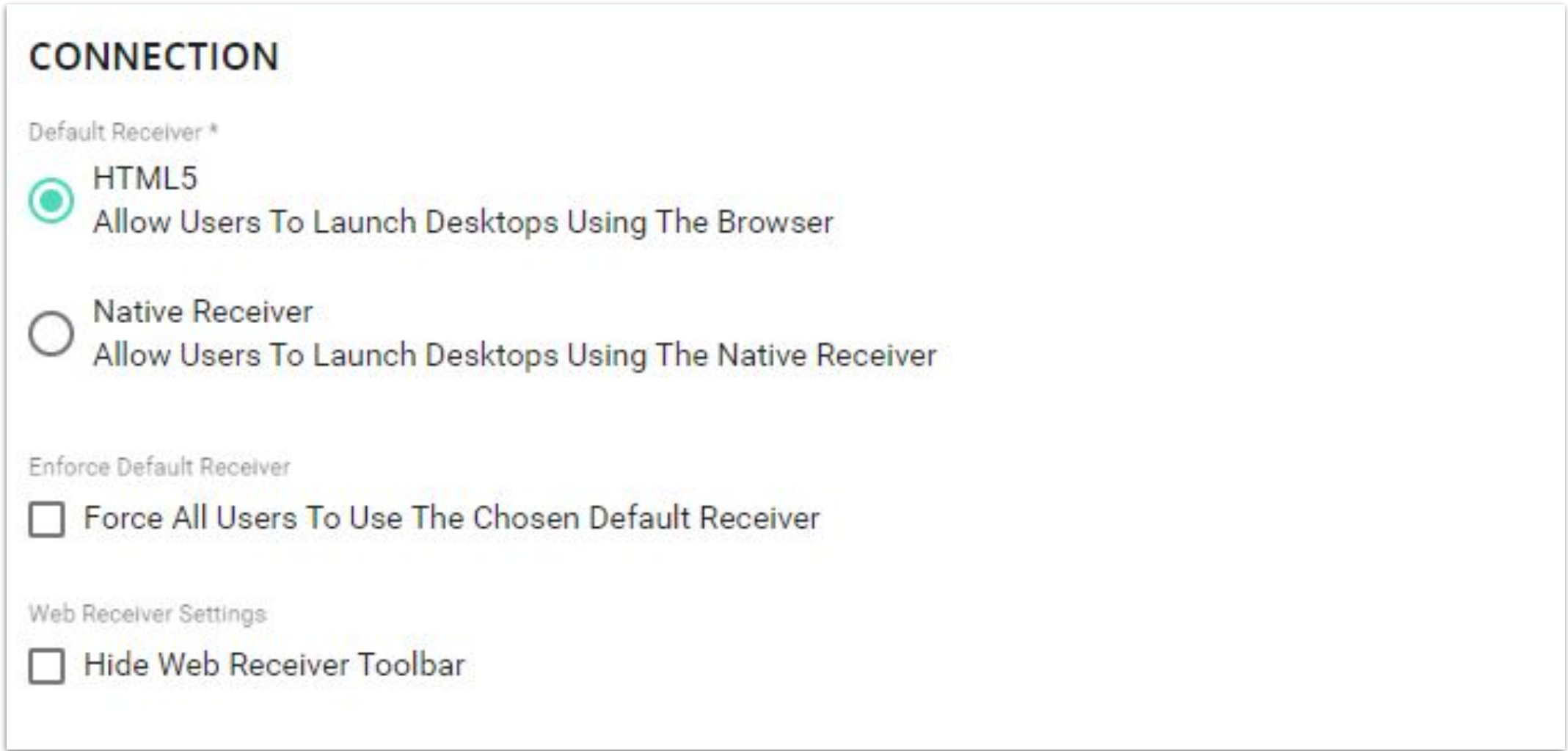

*Figure: change the Connection Preference in 'Settings → Personalization → Connection'*

**Caution!**

If you opted "HTML5 Browser" at first and you would want to change to "Native Workspace App" afterwards, you will have to download the Citrix Worskpace App.

Please use following link: https://www.citrix.com/downloads/workspace-app/

# Launch the First Virtual Desktop in 6 Steps

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# Dashboard

## 1.1   Admin

Depending on your user credentials and your subscription type, you might see less items in the Dashboard. It gives you a quick overview of all the resources available. All details can be found in our FAQ.
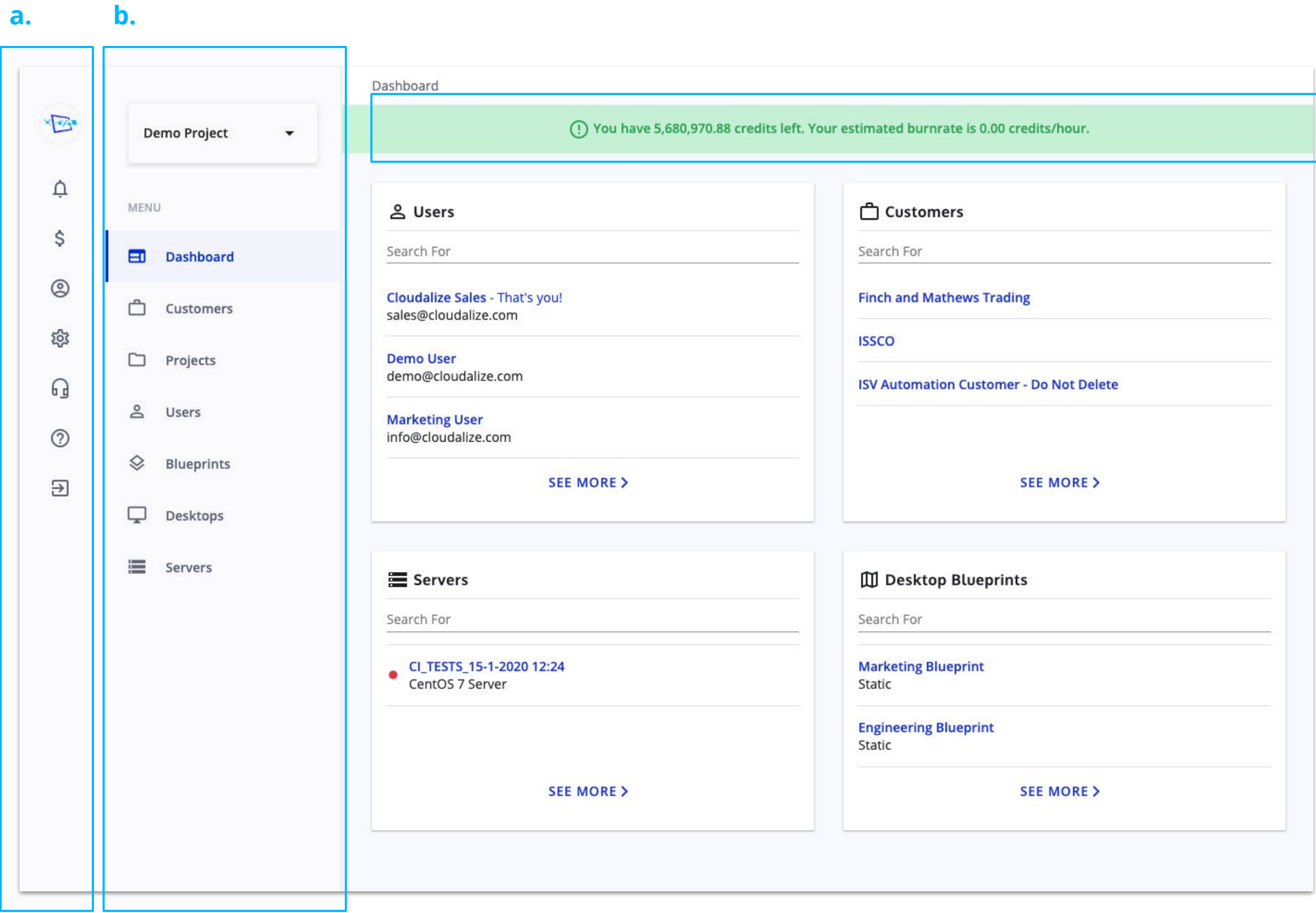
The main parts are:

**a.   Product Level Navigation**

- Notifications          - Support

- Billing                    - FAQ

- Profile                   - Log Out

- Settings

**b.   Project Level Navigation**

- Customer dropdown       - Projects
  (available to partners)

- Project dropdown          - Users

- Dashboard                   - Blueprints

- Customers                   - Desktops

                                      - Servers

**c.   Burn rate**

A quick overview on how many credits are still available and how many you are using. The hourly usage is an estimate based on two days of use. From here, you can click through to the billing details.
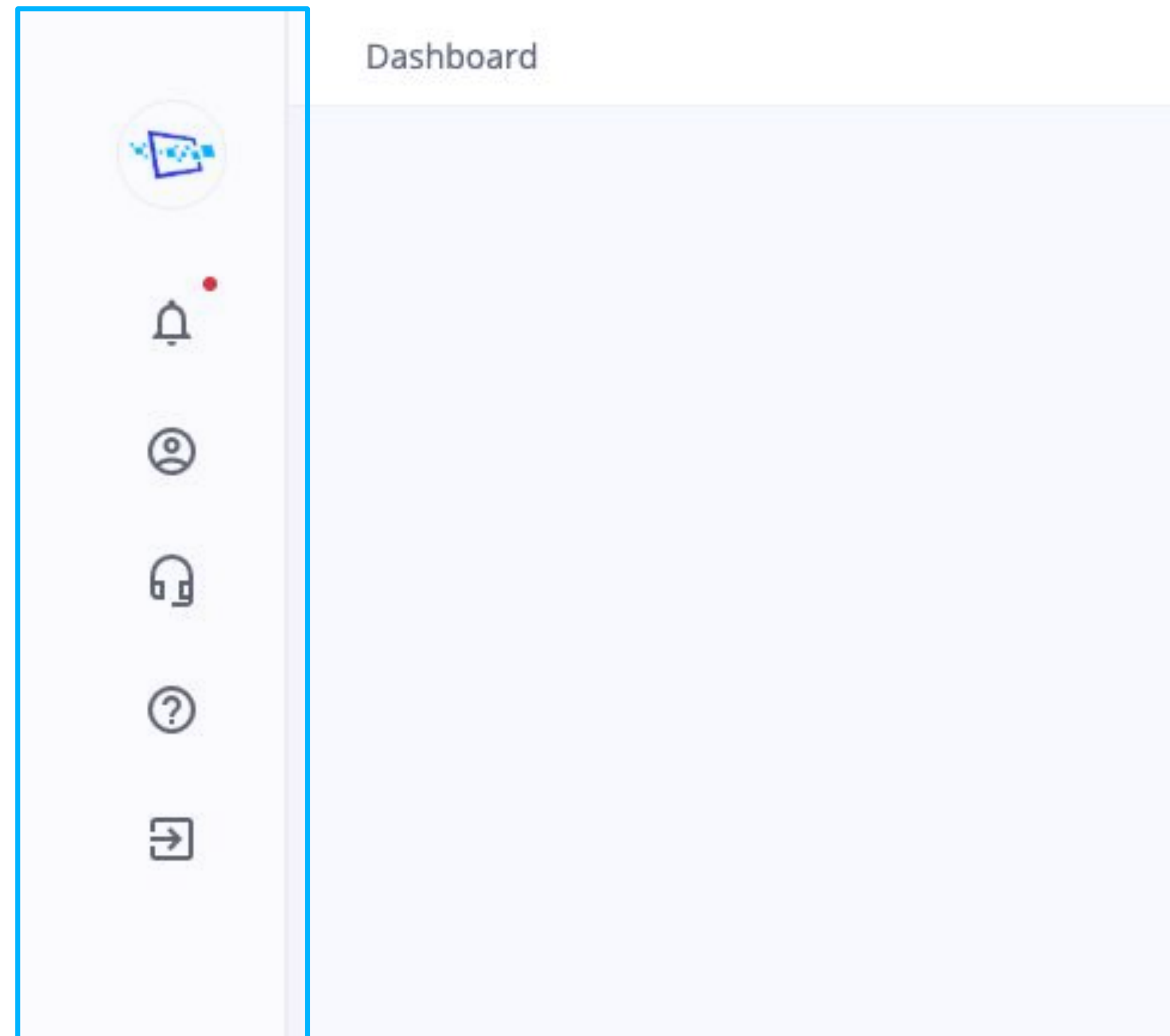
# Dashboard

## 1.2   End-User

Being on end-user level, the navigation will be more simplified because of limited features.

The main parts are:

- Logo (which links to the dashboard)
- Notifications
  - Here you will see messages regarding the Cloudalize Platform, such as new releases, scheduled maintenance and incidents.

- Profile
- Support
- FAQ
- Log Out

Dashboard

# Upload credits before getting started

**Please note that adding credits to a customer account can only be done by the administrator(s) of that account.**

Before you can deploy your first virtual desktop(s), make sure you have enough credits. Read the steps below or have a look at the FAQ article for a more detailed overview.

1. Navigate to the "Billing" page
2. Add a credit card in the "Payment Method" widget
3. In the "Balance" widget, click on the button "Buy Credits"
4. A pop-up window will open
5. Select the amount of credits you wish to purchase
6. Click on "Pay [amount of credits]"
7. The credits will appear on your account now and will be charged from your Credit Card

Contact your Sales representative if you have any questions concerning billing.
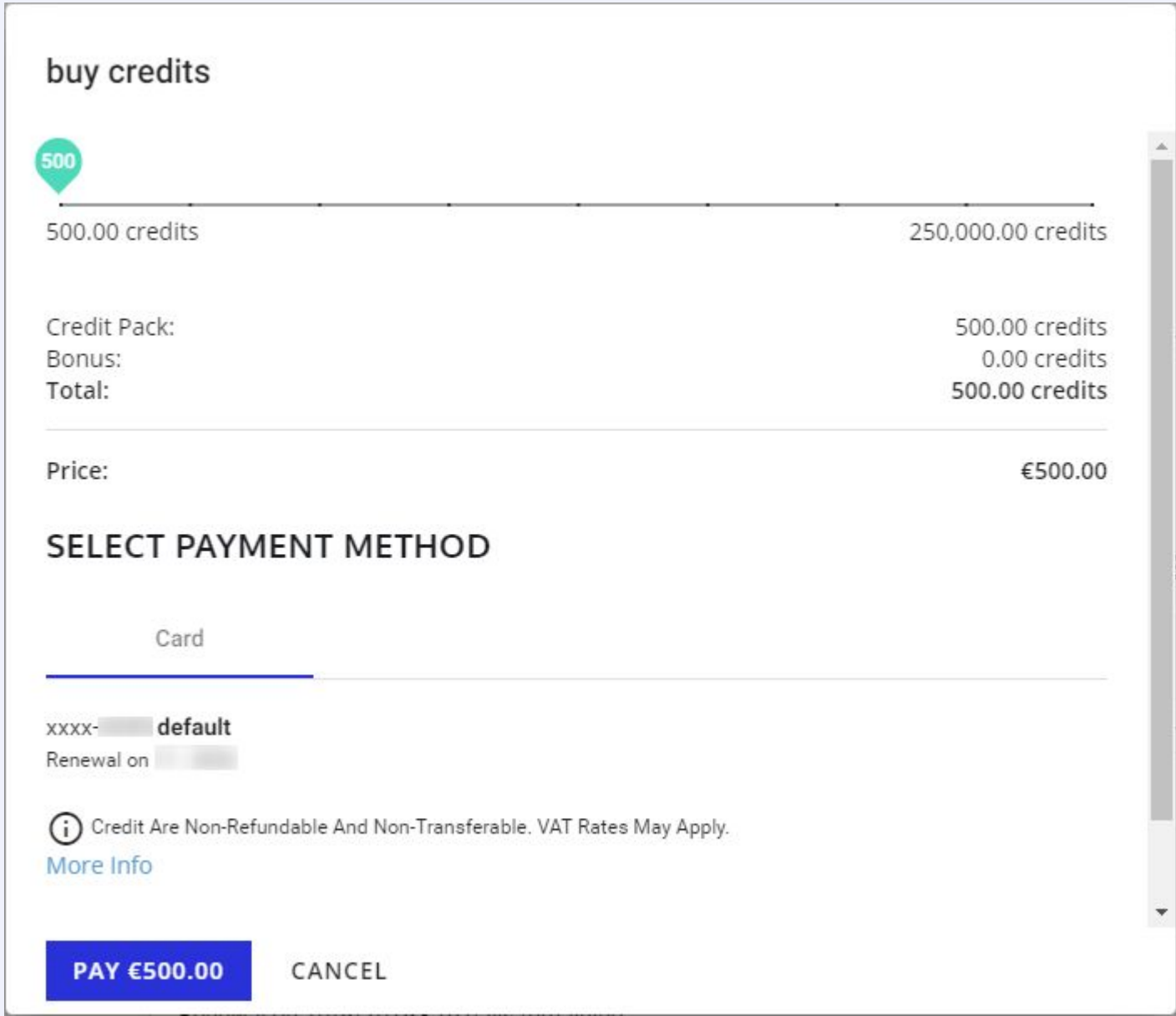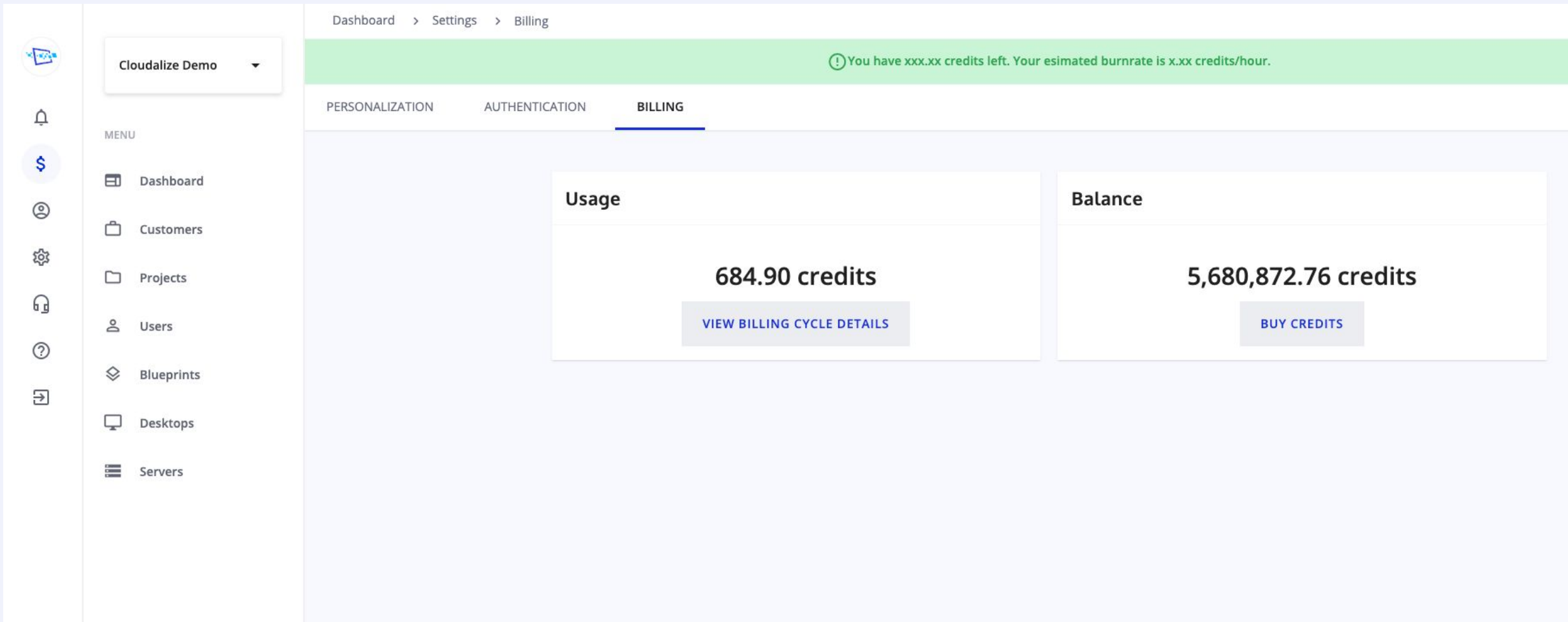
# Step 1: Deploy a Desktop Blueprint

As an admin, you can easily create desktops that can be assigned to any user within a project. In this short how-to, we explain the steps you need to take.

First, navigate to 'Blueprints' in the Project Level Menu on your left. Then, choose your desired blueprint.

By clicking the "+ DEPLOY BLUEPRINT" button, the pop-up window with parameters will appear.



Choose Blueprint

**+ DEPLOY BLUEPRINT**

Select Capacity

Select Project

Select Usage Type

**OK**
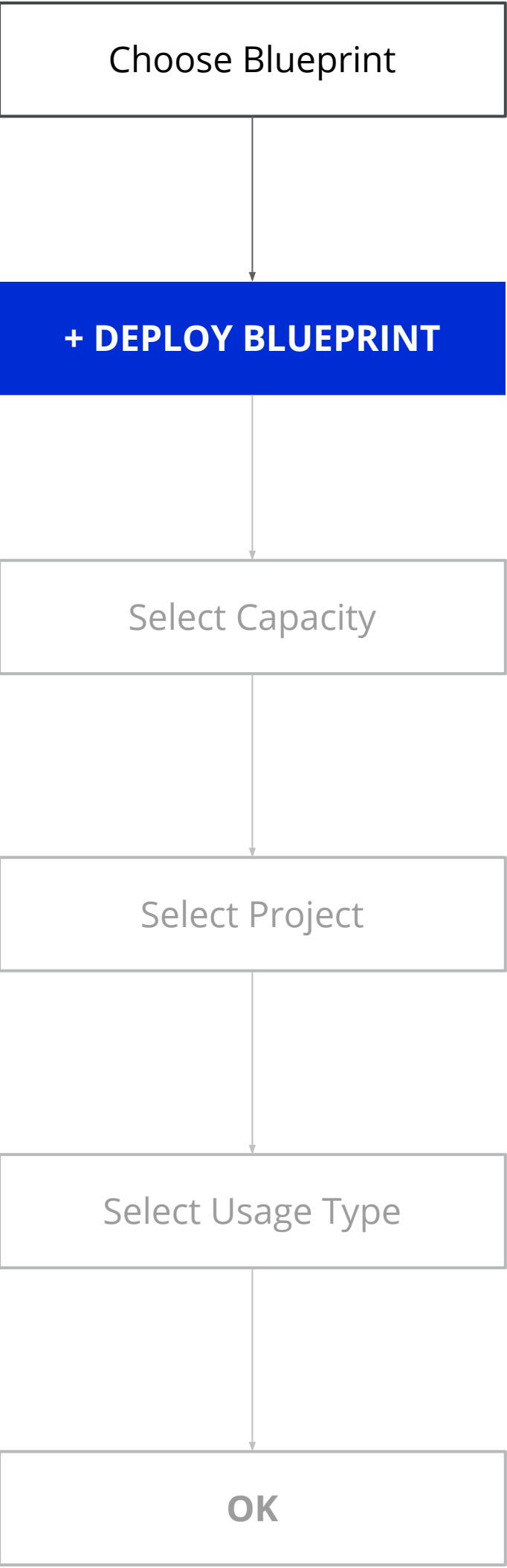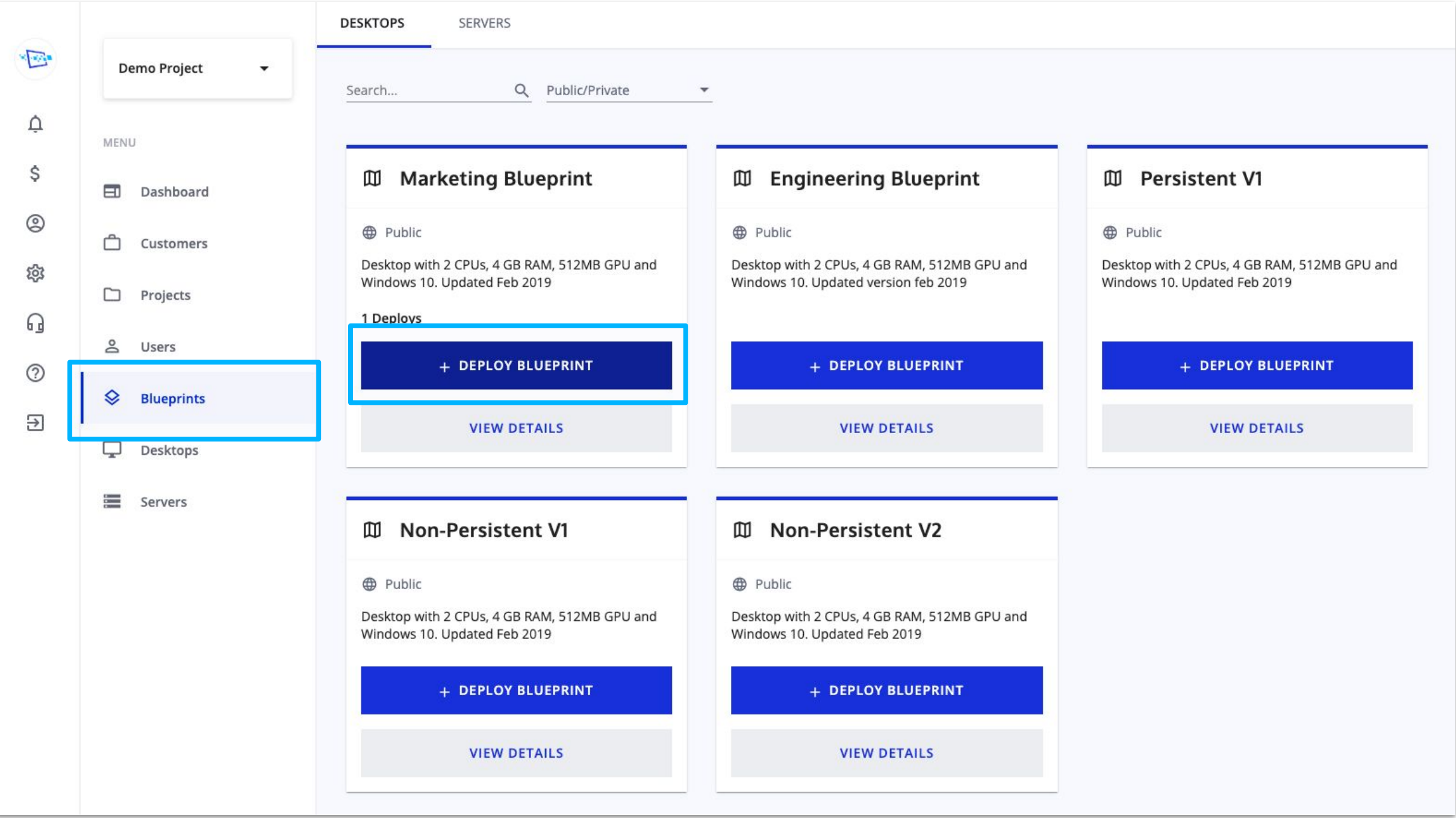
After selecting the specific blueprint, a pop-up window will appear asking you for some details. You will be able to choose the capacity; this refers to the amount of desktops you will need. You will be able to assign one desktop per user. Next you will have the ability to select a project. Last is the usage type, in which you have the option between 'hourly' and 'monthly'.
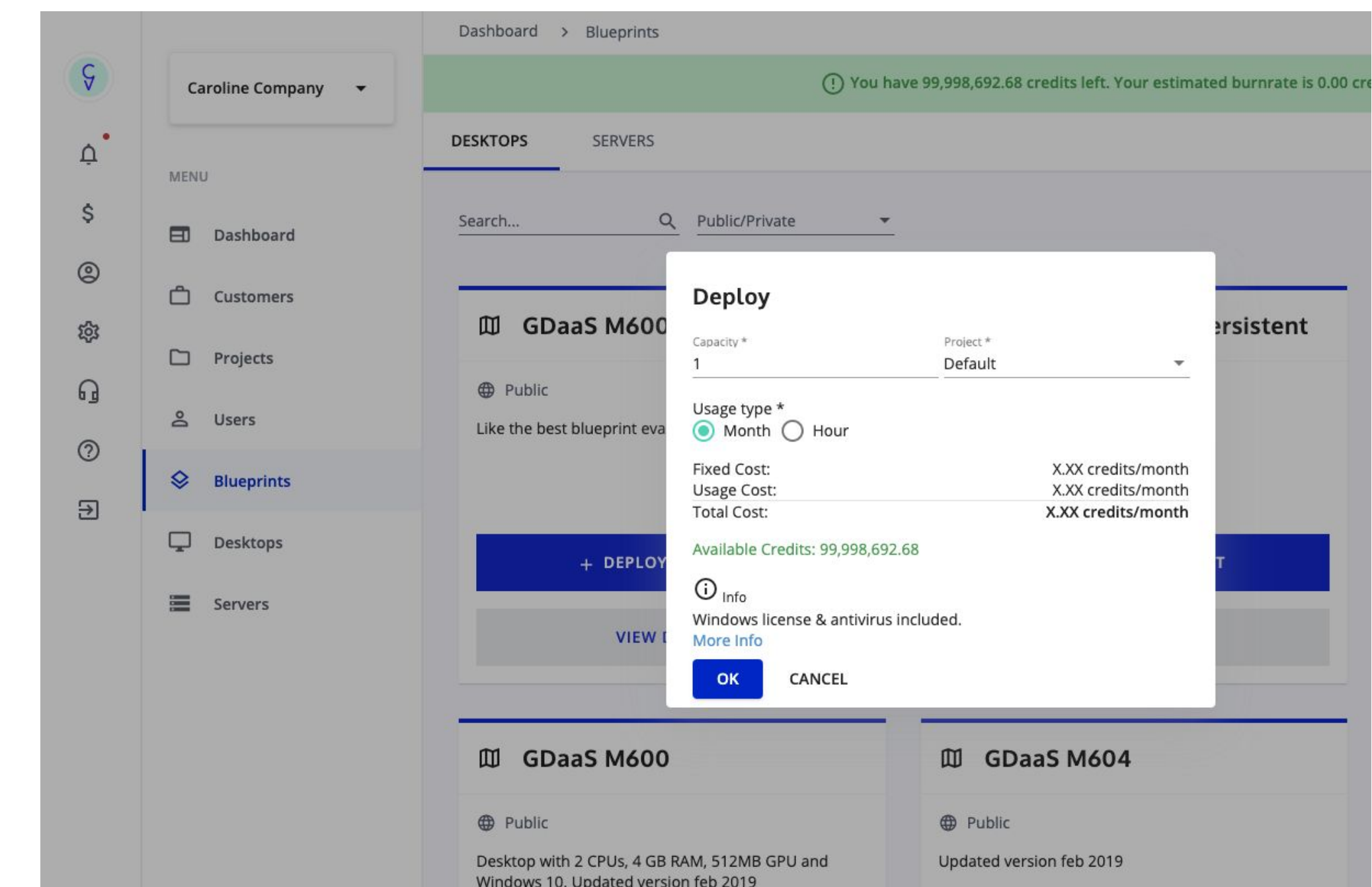


To have a detailed look at the process, we would like to refer you to our FAQ page which covers this topic.

Disclaimer: only one specific type of blueprint can be deployed once per project.
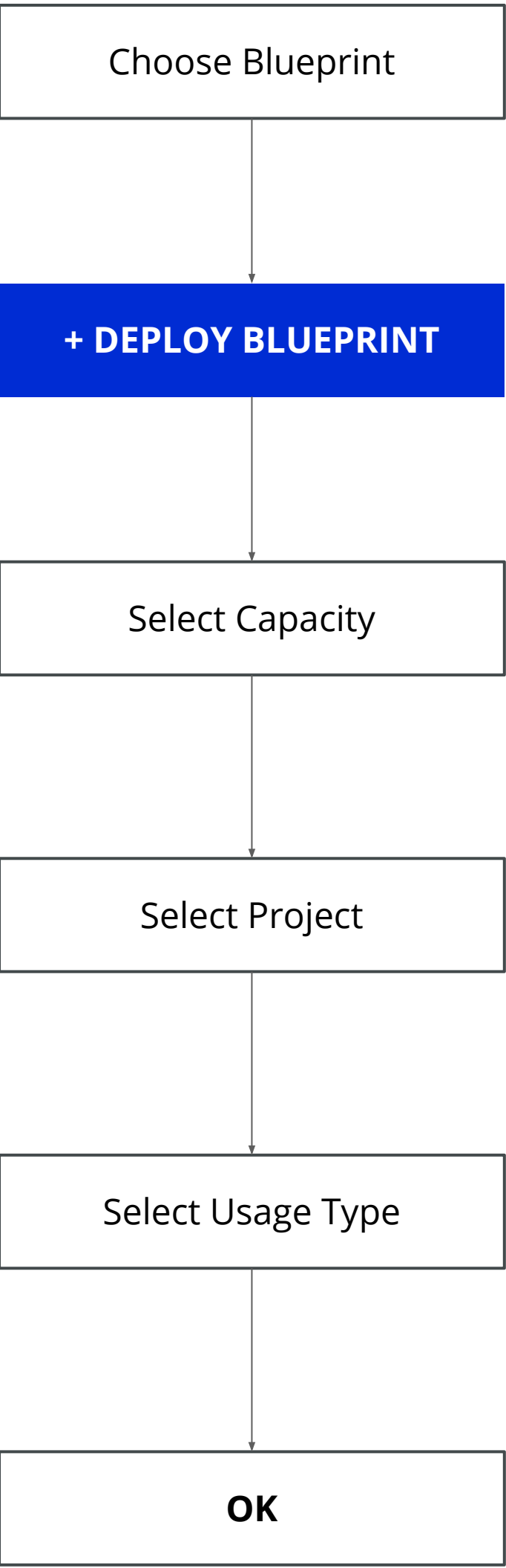
# 2. Create a User

When you log in to the Cloudalize self-service portal, the first thing you will see, is the "Dashboard". It shows you a quick overview of all your resources. From there, you are able to navigate to "Users" to quickly add a new user.
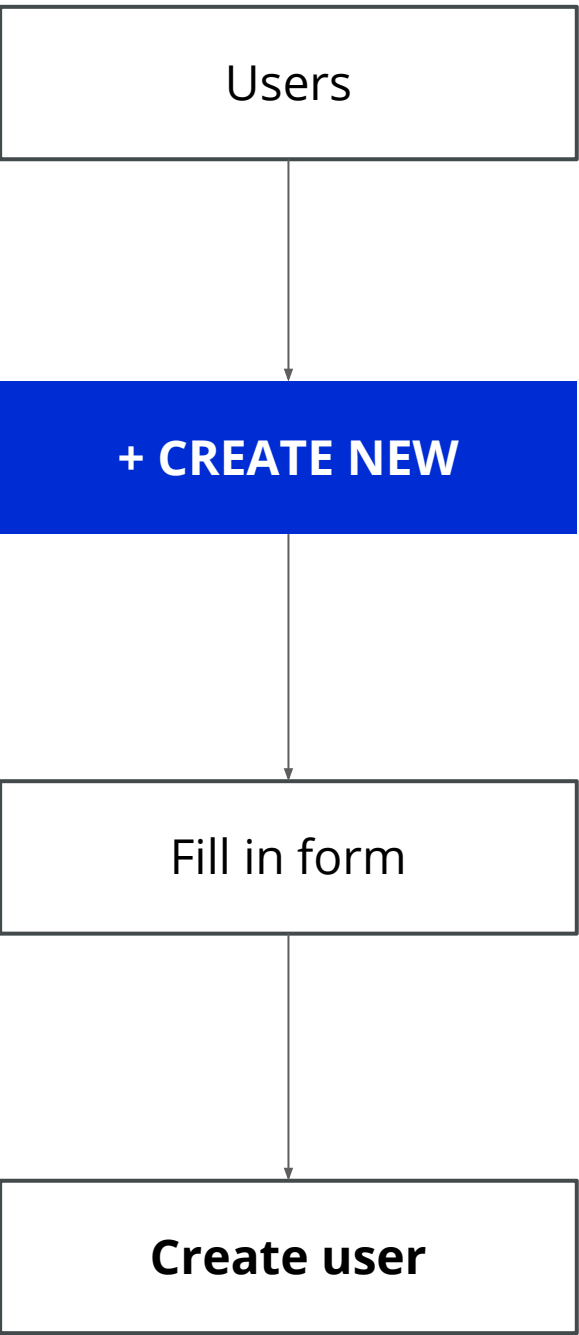
## Create a user

- Fill out the users' name and email address

- Select a role (user or admin level)

- Select a project (the "Default" one is preselected here)
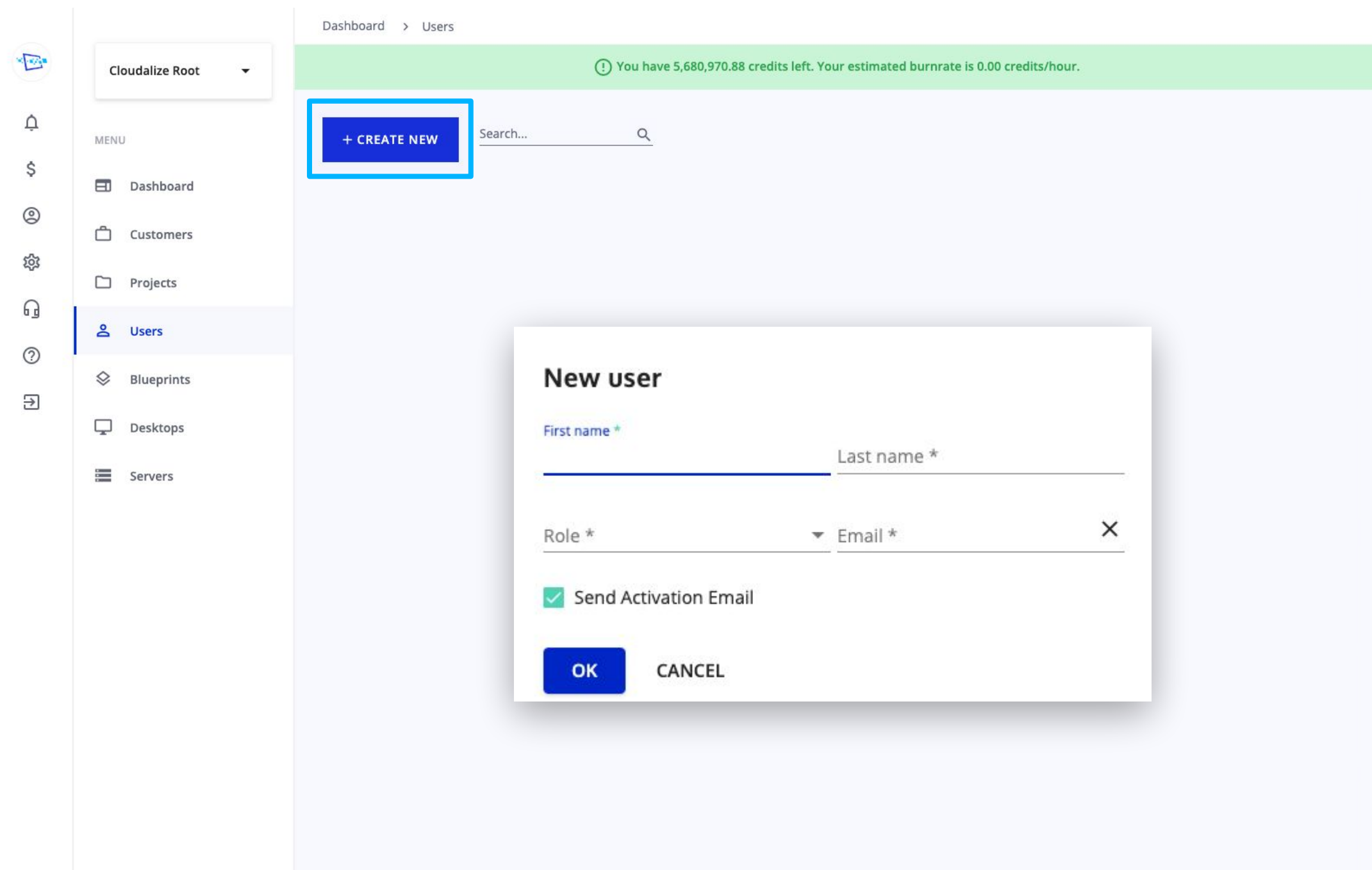
# 3. Enable the New User

If you already have a user, you can just click on the user account via the Users button (for team and enterprise customers). If you're a single user, you can access your user account via Projects → Default.

Enable the newly created user by clicking on the corresponding button on the user view. To navigate to this view, click on "Users" in the left navigation pane and select the particular user.

If you want to read more details, have a look at our FAQ page.
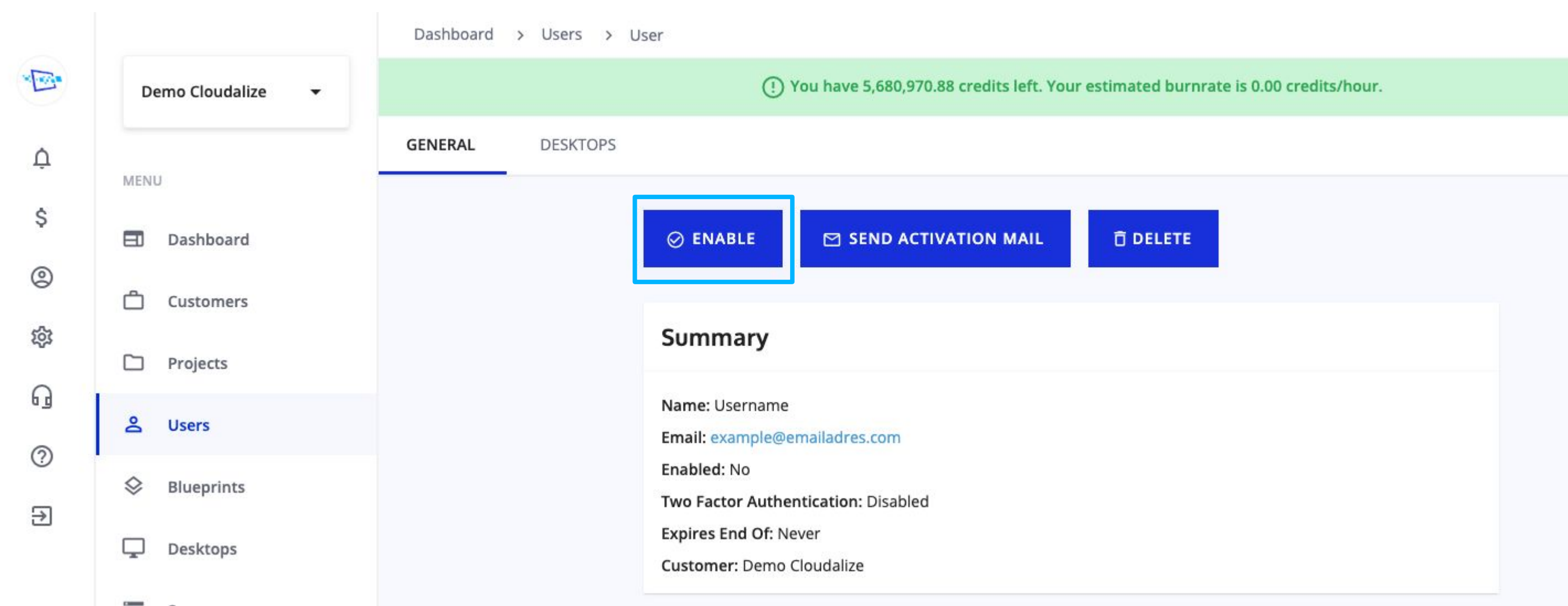
# 4. Assign the Desktop

## 1. Navigate to "Users"

- Navigate to the "Users" page. From there, choose the User that you want to assign to a virtual workstation. Click on the "Desktops" tab to get an overview of all available desktop models to choose from. The available desktop models will depends on which blueprints you have deployed.

## 2. Assign the desired model

- Use the toggle to assign or unassign the desired virtual desktop to that specific user*

```
                    Dashboard  >  Users  >  User

CLOUDALIZE SALES TEAM      ⓘ You have 98,184.54 credits left. Your estimated burnrate is 4.87 credits/hour.

MENU                       GENERAL        DESKTOPS

□  Dashboard
□  Projects                        DESKTOPS
⚙  Users
◈  Blueprints                      Quadro P5000
□  Desktops                        Quadro P2000
☰  Servers
```
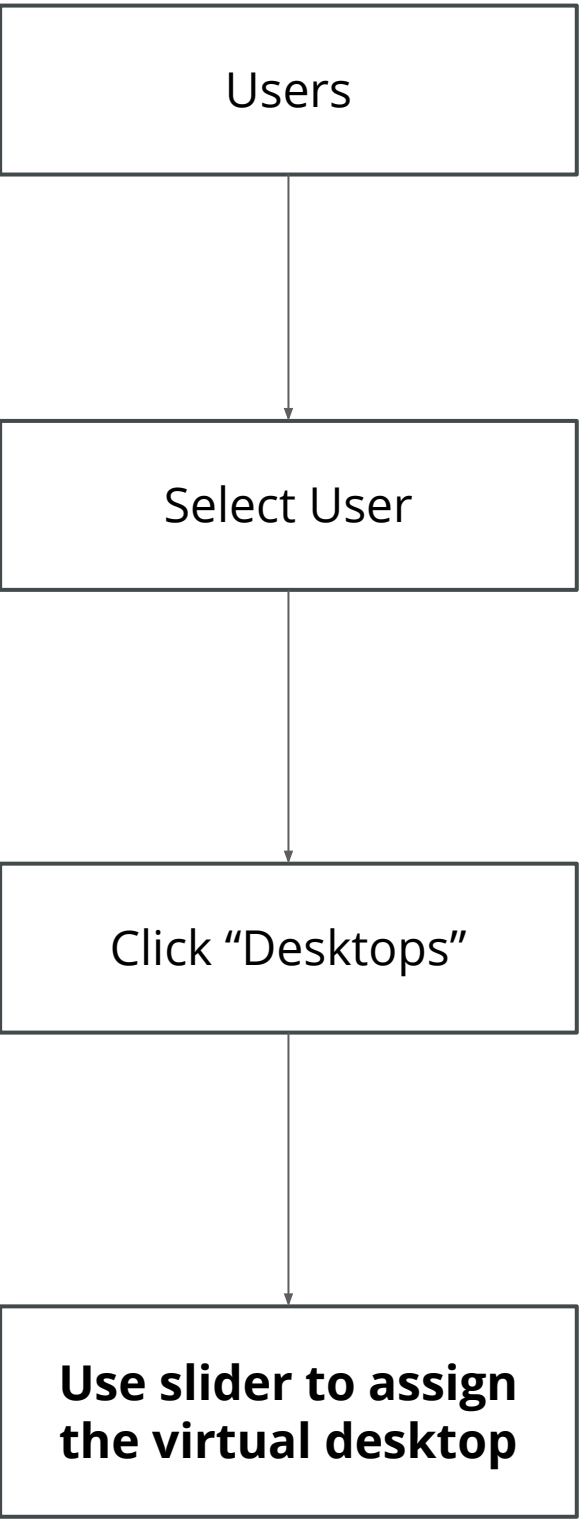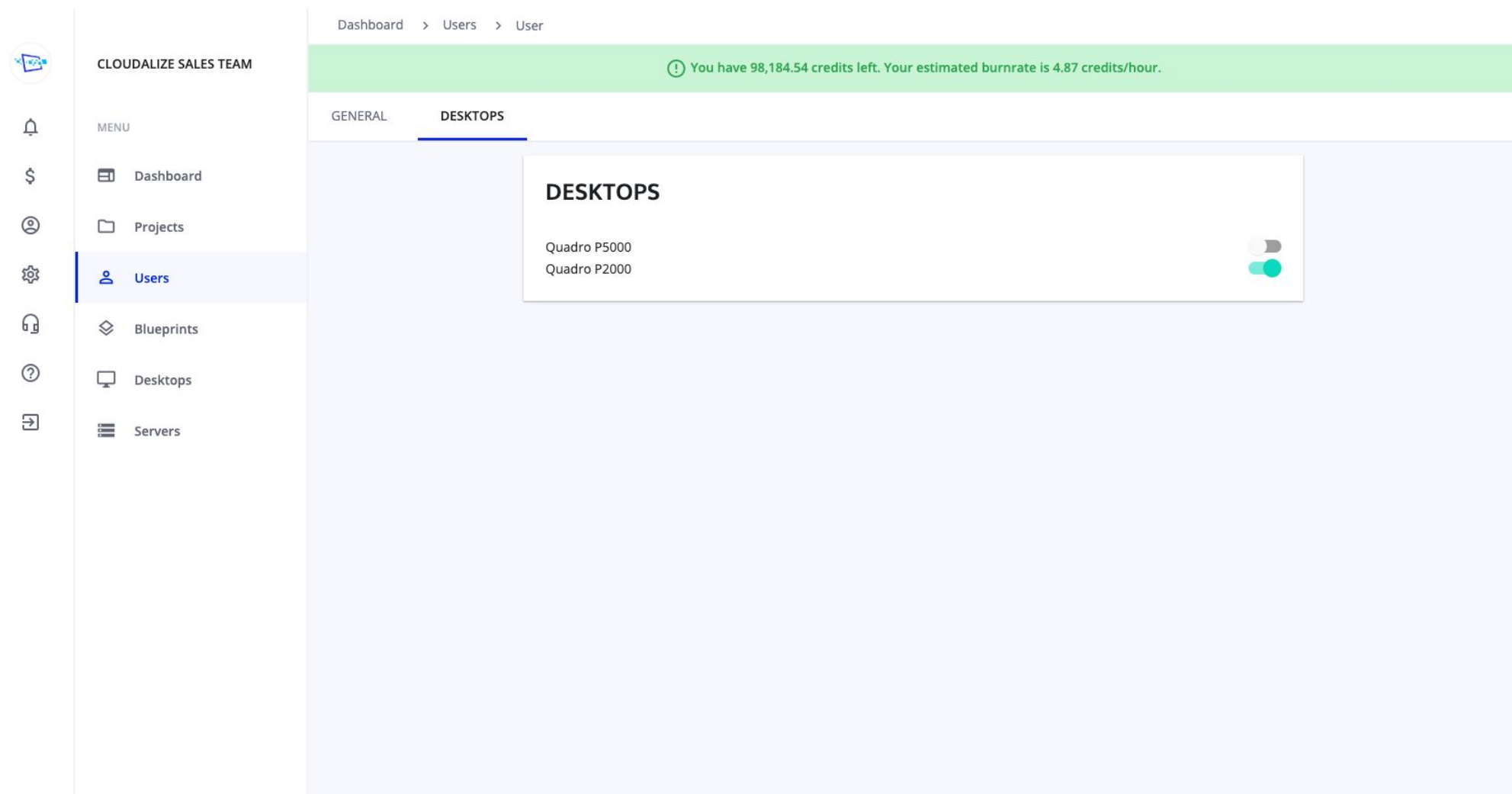
| Users |
| Select User |
| Click "Desktops" |
| **Use slider to assign the virtual desktop** |

*Note:  when you unassign a workstation, that workstation is destroyed. You'll get notified via a pop-up when trying to disable a workstation or unassign a workstation to a certain user.*
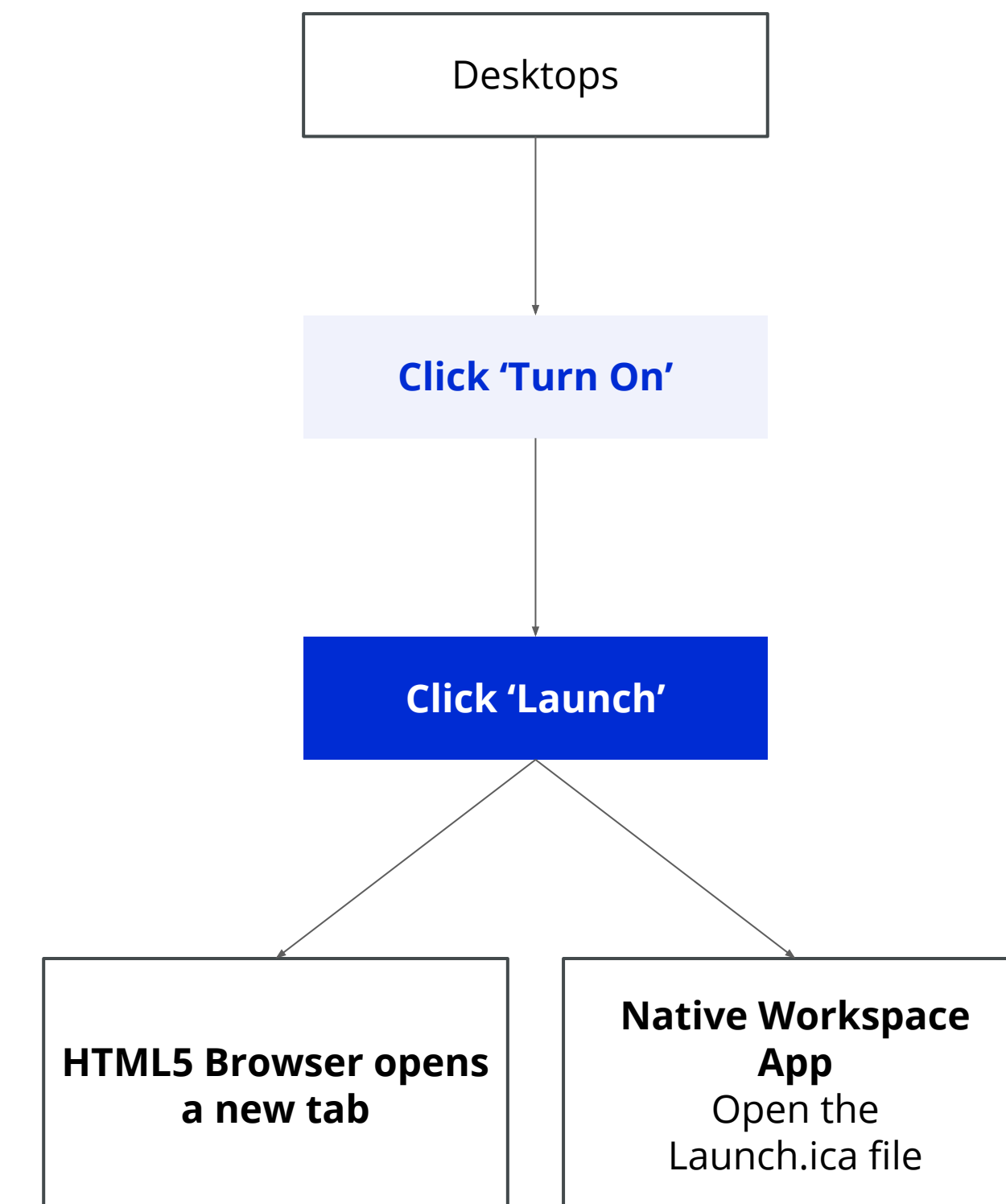
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# 5. Launch the Desktop

## a. Using the HTML5 Browser or Native Workspace App

Now that your user has one or more assigned virtual desktops, it's time to logon and start working. The assigned user can control basic tasks like turn on, turn off, launch and reboot the virtual desktop. Find out about the state of your desktop by having a look at the "Status" indicator on your desktop card.

**Launch the virtual desktop with following actions:**

1. Open your browser and navigate to the platform for North-American Users or platform for EU users

2. Select an assigned desktop in the dashboard (end-user)
   or navigate to "Desktops" (admin).

3. After clicking "Turn On", wait until you are able to click the "Launch" button. After clicking this button, your desktop will be launched based on your connection preference:

   3.1. HTML5 **Browser**: your virtual desktop opens in a new browser tab.

   3.2. **Native Workspace App**: open the launch.ica file with Citrix receiver. This opens the virtual desktop in the Citrix receiver.

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Desktops

↓

**Click 'Turn On'**

↓

**Click 'Launch'**

**HTML5 Browser opens a new tab**

**Native Workspace App**
Open the Launch.ica file

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## b. Using the Cloudalize app

1. Open the Cloudalize app from your list of applications

2. Turn on the desktop you want to connect to by clicking on the arrow/play icon

3. After the computer icon has turned green, it is ready to be launched. Click on the computer icon to launch the virtual desktop.

4. Your desktop is launched in the Citrix Workspace App.
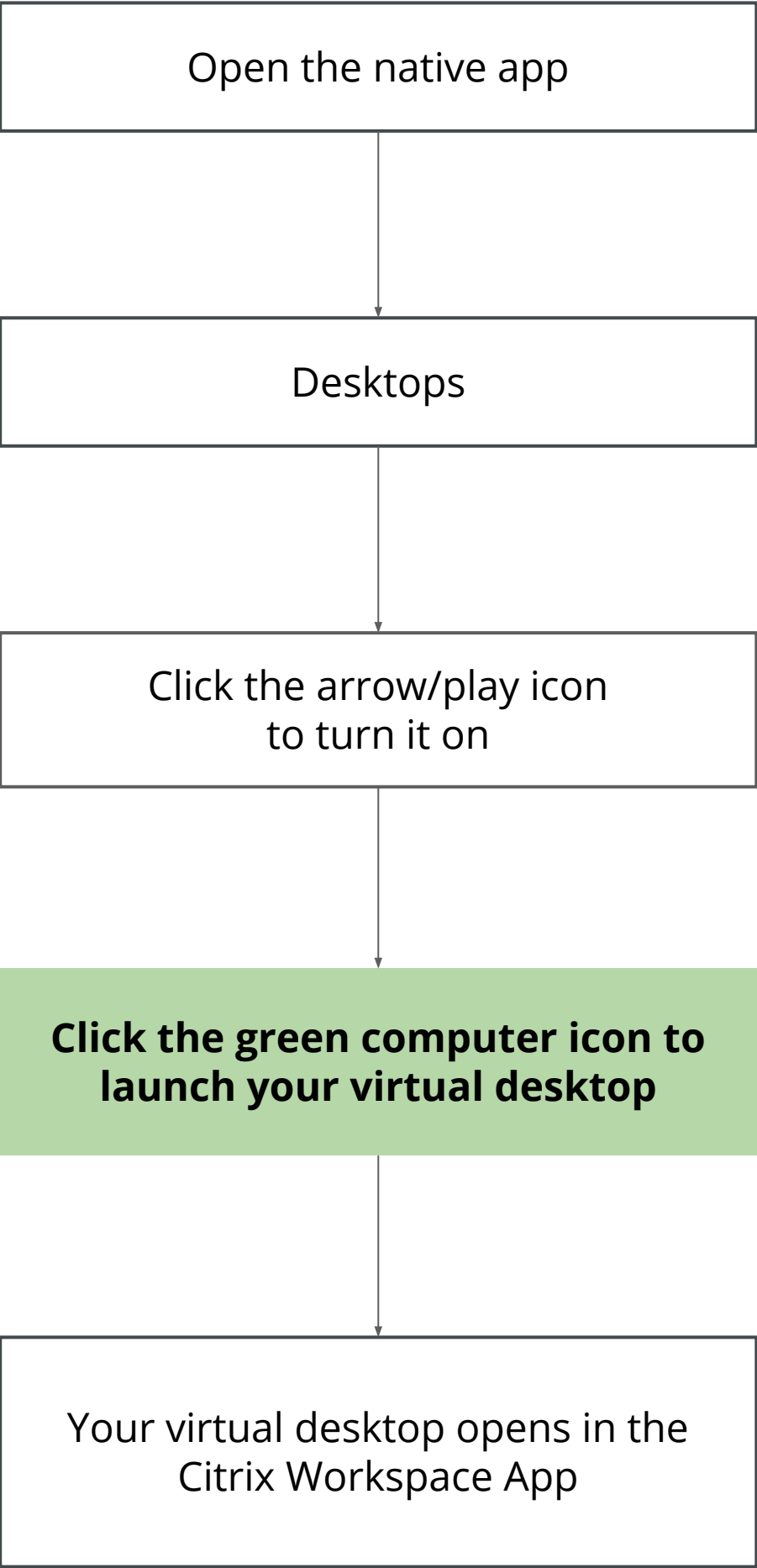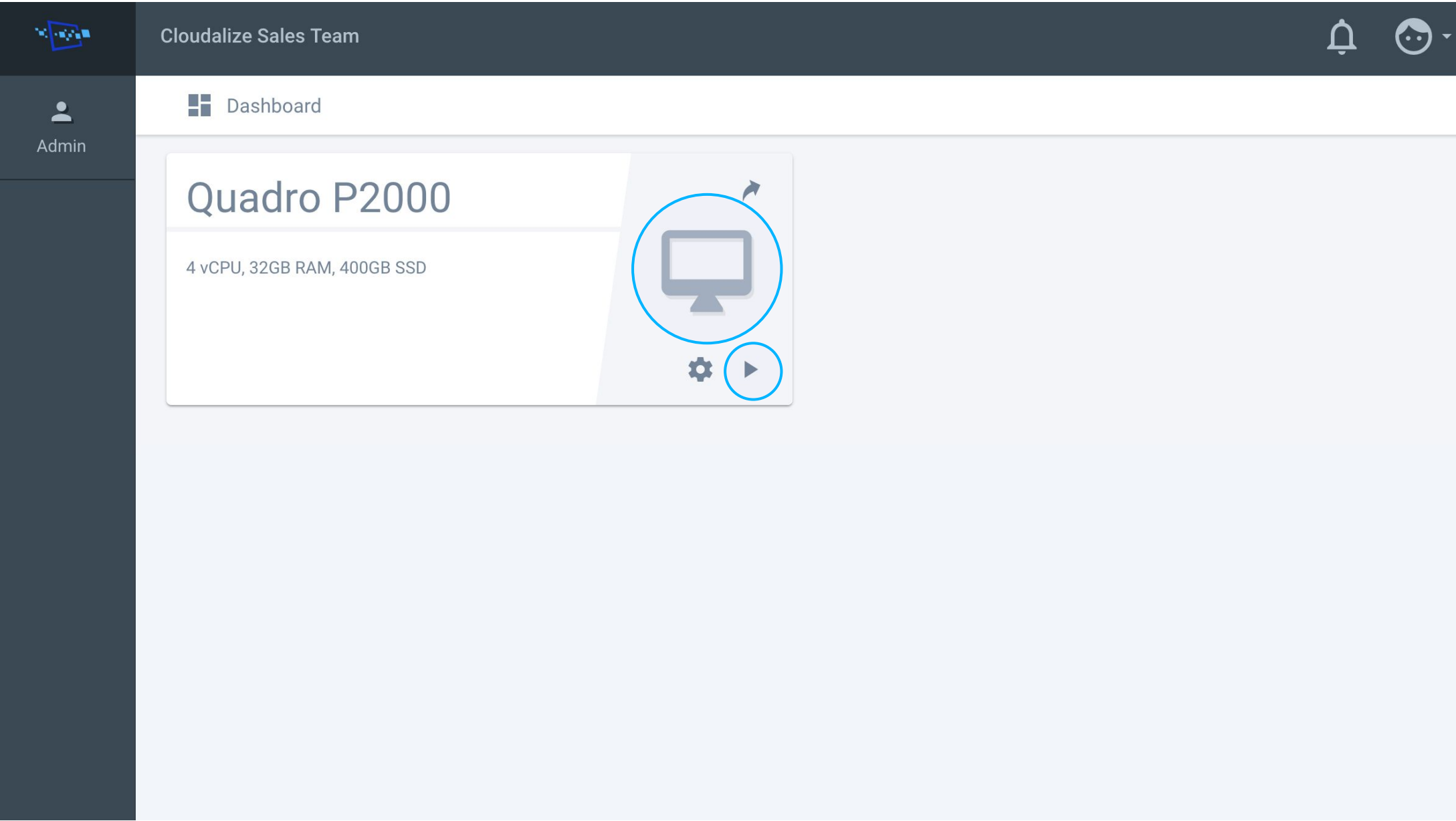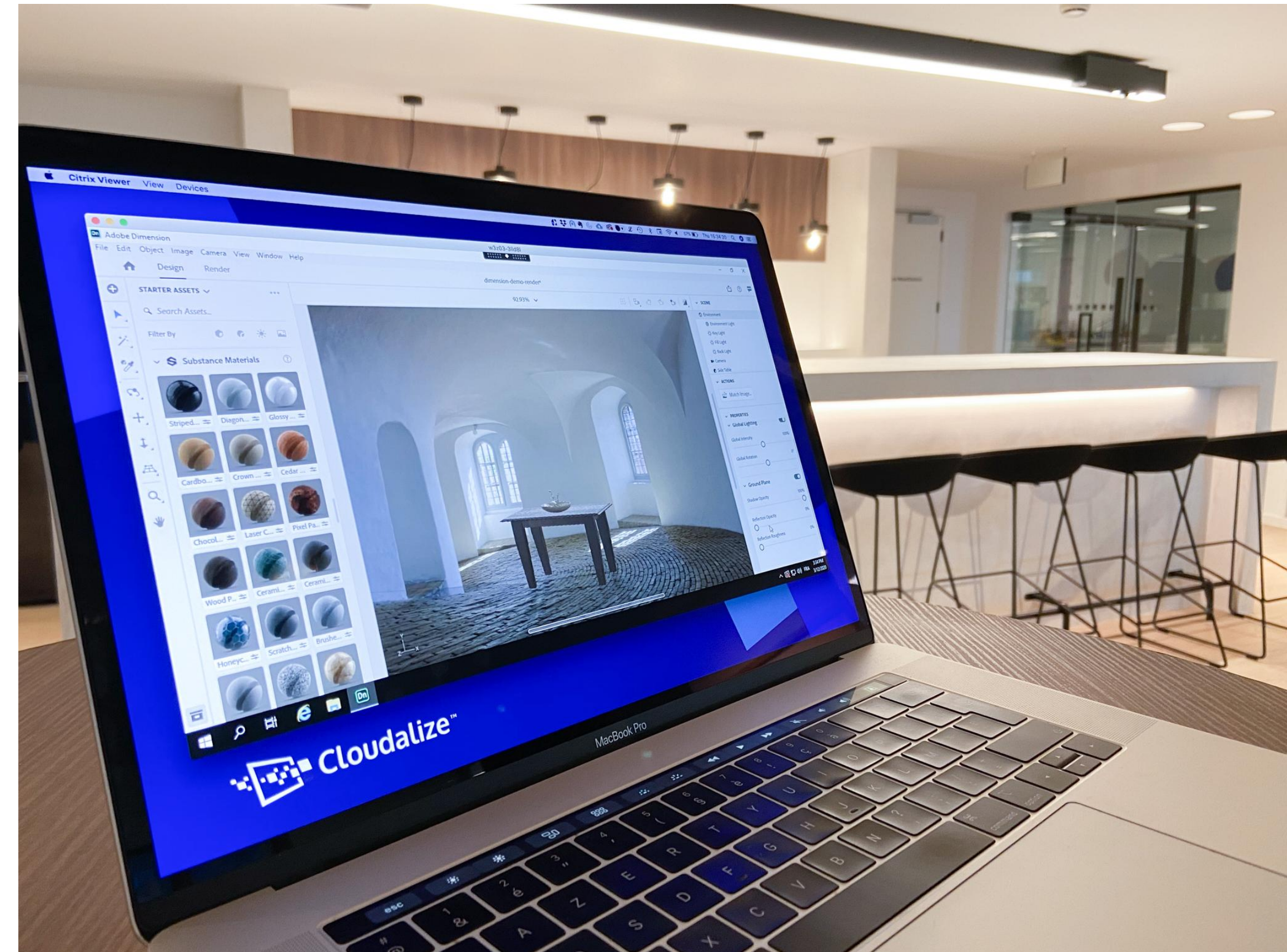
# 6. Let's start working!

Thank you for choosing the Cloudalize solution. We would love to hear your feedback. Please have a look at our FAQ or get in touch with our support team if you have any questions.

**Did you know?**

The biggest advantage of working with the Citrix Workspace App is the ability to use up to four screens.

Check out more advantages in this article.

# Useful links

## FAQ links

[Getting Started (FAQ)](Getting Started (FAQ))

[Activate Automated Shutdown](Activate Automated Shutdown)

[Using Web Browser or Native Receiver](Using Web Browser or Native Receiver)

[How to install Native Receiver (Citrix Workspace App](How to install Native Receiver (Citrix Workspace App))

[How to install the Cloudalize App](How to install the Cloudalize App)

## Resources

[Cloudalize Status Page](Cloudalize Status Page)

[Cloudalize Blog](Cloudalize Blog)

## Contact Support

[support@cloudalize.com](support@cloudalize.com)

# Glossary

**Assign a user:** Linking an end-user to a specific Virtual Desktop

**Blueprints:** You can choose to deploy from blueprints. These publicly available blueprints are easy to deploy and get you started (available to admins).

**Capacity**: This is the amount of desktops you want to deploy. For instance, if you have only 1 user, you leave this at one. When you want to deploy this desktop to 5 users, you choose 5.

**Citrix Workspace App**: This is the newer version of the old Citrix receiver. This will stream the image from our datacenter onto your local client using the Citrix viewer.

**Customers**: You can overview, create and manage all your customers (only available to our partners).

**Desktops**: The launch pad for assigned desktops. From here you can see and manage (startup, shutdown, restart) your own desktop(s).

**End-User**: The actual person that will be working on and with the virtual desktop provided

**Incident**: Any malfunction or unusual behavior related to the virtual desktop.

**Maintenance**: The period in which we update and order to improve the user experience.

**Native Receiver**: This is the same as the "Citrix Workspace App" or "Citrix Receiver" as we often refer to.

**Project**: For Enterprise subscription, you'll have the possibility to create projects. Within such project you can create users, desktops, servers and manage their specific network details

**Servers**: An overview to your deployed servers. From here you can deploy new servers or manage your existing servers. (Available to admins)

**Settings:** Account settings (e.g. billing settings) can be found here (available to admins).

**Usage Type**: You can choose between Monthly and Hourly. Visit cloudalize.com for our latest pricing plans.

**Users:** Within this navigation item, you'll see a list of all your users and are able to add/edit/delete users and their assigned desktops.

**Virtual Desktops**: This is the actual virtual windows machine that you is used by you or the client

**Virtual Workspace**: The virtual platform in which you can work, manage and overview the virtual environment

**Web Browser**: Your preferred HTML5 internet access application

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# Unlimited GPU Resources.
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# device.

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