

eFiler v4 Advanced User Guide

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Introduction

This administration guide for eFiler is targeted at system administrators. This should be read in conjunction with the appropriate eFiler User Guide.

In order to complete advanced setup and configurations the administrator will require full admin access rights to the local and cloud based platforms (where relevant).

Where companies do not have the relevant skill set in house we are able to provide consulting services to assist with advanced setup and deployments.

Benefits of eFiler

- Reduces mailbox sizes
- Centralizes emails with other data making it easy to archive and recover project data
- Email preview is available even when you are not connected to your data
- Indexed search saves time and improves team efficiency
- Improves compliance
- Low cost Outlook addin requires no additional server implementation
- Easy implementation and centralized configurations
- You remain in control of your data. Emails are filed to your own storage locations and can be accessed at any time with or without the use of eFiler.
- Enables the preparation of filing emails from mobile devices
- Allows users to benefit from automatic email filing with rules

eFiler is provided in both a 32 bit and 64 bit installation file (Microsoft Installer or .msi file). The installer required should match that of the installation of Microsoft Outlook.

Please always download the latest version of eFiler directly from our [website](#).

To update eFiler, simply download the latest version and run the installer to upgrade your existing installation.

The trial version and licensed version of eFiler are both installed from the same installer.

[Activation](#) is achieved by purchasing a serial number.

Video Guides

For videos on user operation please refer to the following website links -

<https://efiler.co.uk/features/videos>

Please also see relevant topic based videos in our Blog - <https://efiler.co.uk/blog>

Installation

Basic installation

The simplest way to install eFiler is to double click the eFiler.msi installer available from <http://efiler.co.uk/efiler-downloads> with Outlook closed.

The .msi installer can also be installed & deployed using Group Policy or third party deployment tools.

Notes Always install eFiler with Outlook closed and ensure you have full local admin rights. If in doubt install from an elevated command prompt.

Installation switches for client & server modes

Client mode installation (requires Outlook desktop client on Microsoft Windows) -

Install eFiler with the SNUM switch to provide the serial number during installation (find a registry key alternative in the User Manual)

`msiexec /i "c:\temp\efiler.msi" SNUM=SSAAMMGYYII` (please provide a valid serial number after SNUM=)

Server mode installation (for centralised Autopilot indexing*) -

Install eFiler Server Mode where you would like to install the eFiler central indexing server (no requirement for Outlook). By installing the eFiler service centrally only 1 computer will maintain the index. The benefits are less network bandwidth and CPU consumption and instant updates to the indexes as folders are added/removed or renamed.

To install the eFiler Service on a computer without Outlook by running the following command line switch

`efiler.msi SERVER_MODE=1`

or

`msiexec.exe /i C:\temp\efiler.msi server_mode=1 /qn` (Where C:\temp contains the eFiler.msi installer)

Remove / uninstall eFiler by command line -

`msiexec.exe /x C:\temp\efiler.msi /qn`

*Centralised indexing requires an eFiler+ Licence plan.

Notes eFiler Autopilot Service is best run in client/server mode where clients where there are either 20 or more clients or the clients work over a VPN connection.

Troubleshooting the eFiler Server mode Service

If you are intending to run the service in server mode and cannot add locations, check to confirm you are running the eFiler Indexing Service (Server) from the start menu. The default service requires locations to be managed from Outlook. In server mode you can add locations directly in the service.

Drive letters must be consistent between the client and the server. Any drive letter indexed by the server takes preference and is adopted by the client (where a client is referencing the server).

Check and allow firewall access. the eFiler indexing service requires access on port 2138

Use the command `netstat -abn` to ensure that eFiler.Service is not in conflict with any other software

Adding locations to Server Mode

To provide indexes for clients select the menu to add locations.

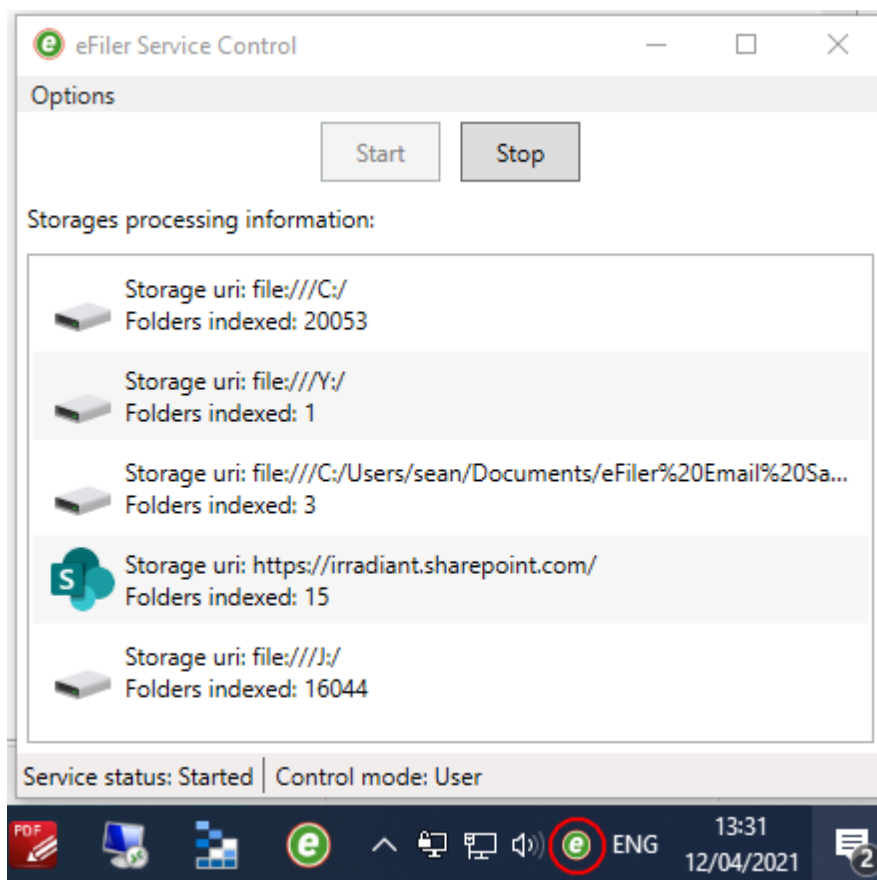
Note - Locations must match those required by client computers and should have a consistent drive letter mapping

Configure client/server indexing for Autopilot

Autopilot relies on the eFiler Service Control application to provide up to date results in order to accurately predict possible filing locations.

In multi-user environments, benefit from installing eFiler in server mode on a network server or workstation that will run continually and be in the best position to monitor folder changes and maintain the index. This is more efficient and allows administrators to extend the re scan interval in settings. Each client referencing the indexing server will default to obtaining its results for all storage locations indexed and offered by the server. Additional local and cloud locations will continue to be maintained on each client computer. To prevent locations from indexing locally an administrator can block paths by policy and within the eFiler server - service control options. Any blocked locations will not be indexed or updated.

Note - Cloud locations are unique to each user (permissions and folder access varies) and cannot be centralized. The eFiler Server mode Service is capable of providing results for local network locations where local clients continue to provide results for user specific cloud locations simultaneously.



*Centralised indexing requires eFiler+ Subscription licenses.

Bulk Licensing & Activation

eFiler licence serial numbers are suitable for multiple activation's.

Each client that is connected or registered to the same licence serial number will be subject to the same policy configurations (where deployed).

To activate multiple computers -

1. Deploy a registry key containing the serial number for auto activation
[HKEY_CURRENT_USER\SOFTWARE\Irradiant Ltd\eFiler\Configuration]
"EF_SERIAL"=*provide-your-serial-number-here*
2. Provide us with your gateway IP address (Google what is my ip)
3. Activate using the SNUM switch during installation
msiexec /i "Drive:\Path\eFiler.msi" SNUM=*provide-your-serial-number-here*

Return a licence

If a computer is to be replaced or no longer needs eFiler its licence may be returned to the pool of available licence activations by clicking "Return license" (within eFiler settings - Licence).

Configuration Overview

Configuration files are stored in the following folder -

C:\Users\%username%\AppData\Roaming\eFiler Outlook addin

The list of filing locations is stored in config.efl

The configuration settings and Cloud Sync templates are stored in config.efc

Exported and policy eRules are stored in a file with the extension .efr

Shared locations are stored online on the licence server. To purge shared locations open the [Policy Manager](#) utility and click "Purge shared locations".

Log files and Indices are saved to the following folder -

C:\Users\%username%\AppData\Local\eFiler Outlook Addin

Notes Configuration files are sensitive to precise formatting and should be modified through the user interface only.

Policy Deployment

System administrators can achieve a consistent deployment by deploying configuration and location policies.

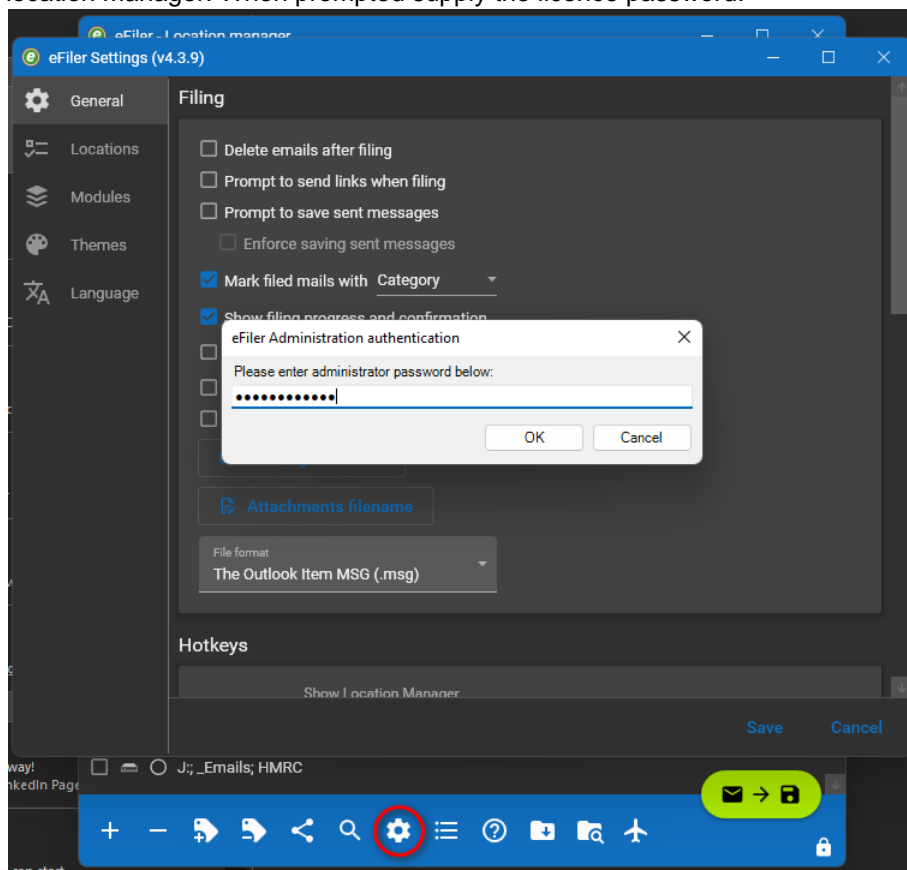
eFiler policies are distributed using the eFiler cloud. No local network server or network share is required.

Each policy is assigned to a specific serial number. Customers with multiple licenses may request multiple license keys based on their policy requirements. All computers assigned to the same license key will share the same policy settings.

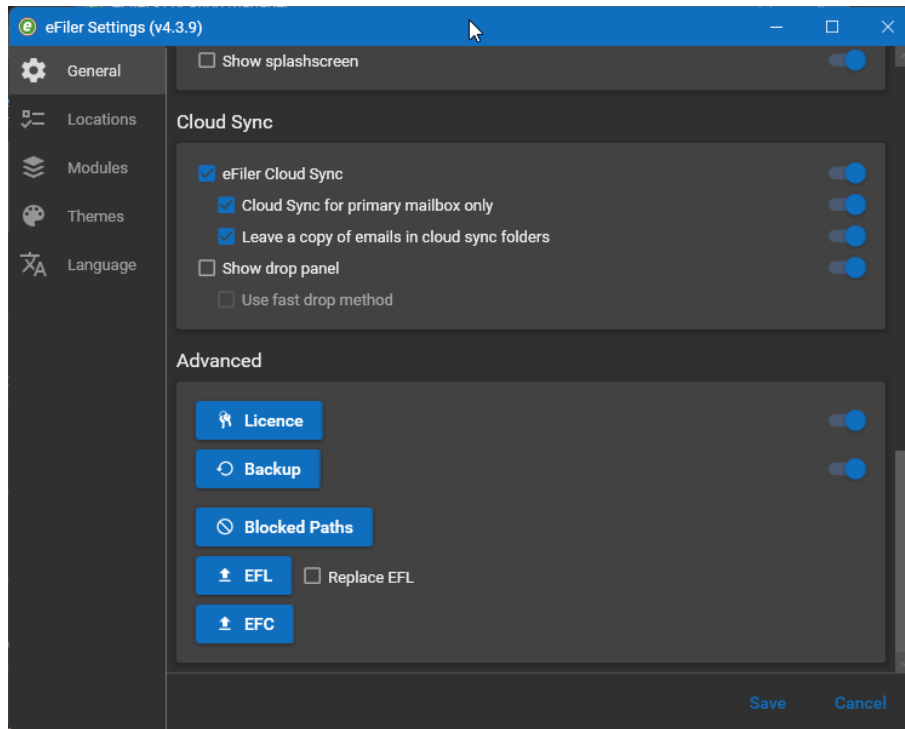
Policy settings can be managed from any computer where eFiler is installed.

Policy Configuration

The easiest way to deploy consistent settings to all users on the same eFiler licence is to access the eFiler settings in administration mode. To do so press and hold CTRL and ALT and click on the cog icon in location manager. When prompted supply the licence password.



If the password is accepted you will enter administration mode as shown below -



Administration mode provides the functionality to configure and lock down settings which should be applied to all users. To configure a policy setting set the preference of the individual setting and then press the slider to the right to lock in the changes. Once you have made the necessary changes scroll to the bottom and click to upload the EFC file (configuration)

The policy is applied each time a user restarts Outlook.

Tip

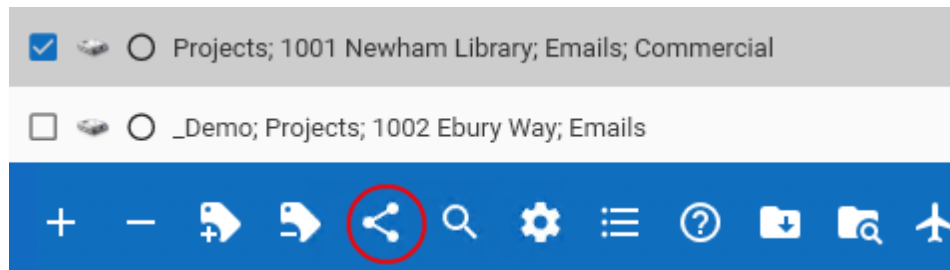
Do not click upload EFL unless you want to deploy your current location as policy locations. Use the additional options available to block specific paths to prevent filing and indexing of unwanted locations

Policy Locations

Locations added to eFiler (either manually or by autopilot) are considered local user locations for the purpose of filing and searching emails. Local locations are displayed with a circular icon - these are specific to your computer and not shared in any way with colleagues.



Shared locations are locations shared by any other user connected to the same license. A location shared by one user will automatically appear for a second user on the same license when they restart Outlook or right click to refresh their shared locations. To share a location, select the local location(s) and click the share icon.



Policy locations are controlled by a central policy maker in the office. Locations can be centrally managed and deployed. Policy locations are not able to be removed or altered by end users and appear with a padlock in users location lists. Policy locations are updated each time Outlook is restarted. See also [Central configurations](#).

Notes It is not possible to share cloud locations
Autopilot can negate the requirement for policy and shared locations. Consider Autopilot configuration first as it avoids the ongoing requirement to manage locations and provides access to all available filing locations.

Cloud Providers

The following cloud providers are supported (requires eFiler+ Licenses) without any need to install the providers local sync software.



BIM 360



Autodesk Build



Box



Dropbox



File system storage



Google Drive



Microsoft OneDrive



SharePoint



WebDAV

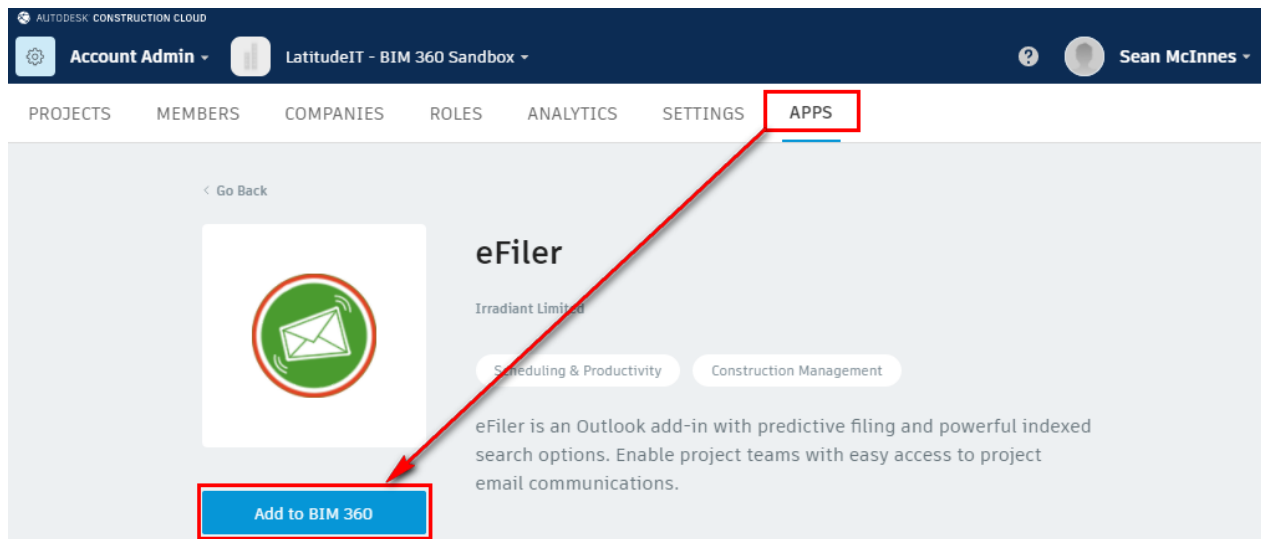
Autodesk BIM360

eFiler can file and find emails to Autodesk BIM360 and Autodesk Construction Cloud projects. There is no requirement to install the Autodesk Desktop Connector.

To connect the eFiler application to your BIM360 or Autodesk Construction Cloud portal complete the following steps -

BIM360 & ACC company wide App authorization -

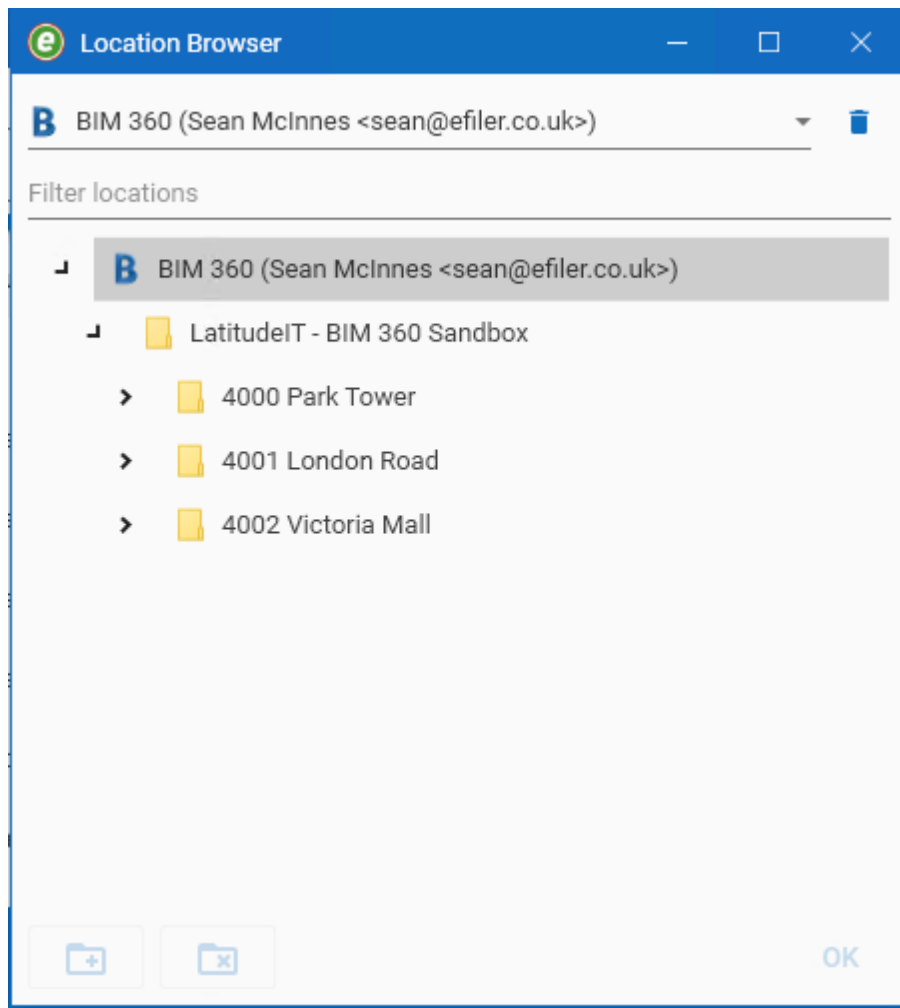
As an administrator connect the application to your organization by visiting <https://admin.b360.autodesk.com/> (for BIM 360) or <https://admin.b360.eu.autodesk.com/> (for Autodesk Construction Cloud). Select 'Apps'. Under 'Featured Apps' select eFiler and select 'Add to BIM360'. Once added the app with show as 'Active'. You can now proceed to install eFiler and users will be able to connect to BIM360 or ACC project locations.



Client Authentication -

To file and find emails to Autodesk BIM360 the user must connect to BIM360 by providing valid Autodesk credentials.

Once connected the user will be able to browse and search for available filing locations.



[eFiler - BIM360 Integration Video Link](#)

SharePoint metadata

Additional fields can be added to SharePoint Libraries to show additional meta data within SharePoint. Please configure the fields as below -

Column name	Type
Subject	Single line of text
Body	Multiple lines of text
Sender	Single line of text
Recipients	Multiple lines of text
MailAttachments	Number
Categories	Multiple lines of text
SentAt	Date and Time

Centralised eFiler Autopilot Service

The default installation of eFiler installs the addin for Microsoft Outlook in addition to the eFiler indexing service application which is run from the system tray. In order to complete the desktop installation Outlook is required as a pre-requisite. eFiler+ license holders can benefit from centralised indexing.

In order to install the server based indexing service complete the installation from the command line using the switch (SERVER_MODE=1). See below for detailed instructions.

Where the server indexing service is installed and accessible the client installation will defer to the server for results.

Install the eFiler Autopilot service as a Windows Service. This will continue to run in the background as a service even when the user logs off from their session on the server.

Benefits -

A single computer performs the indexing work

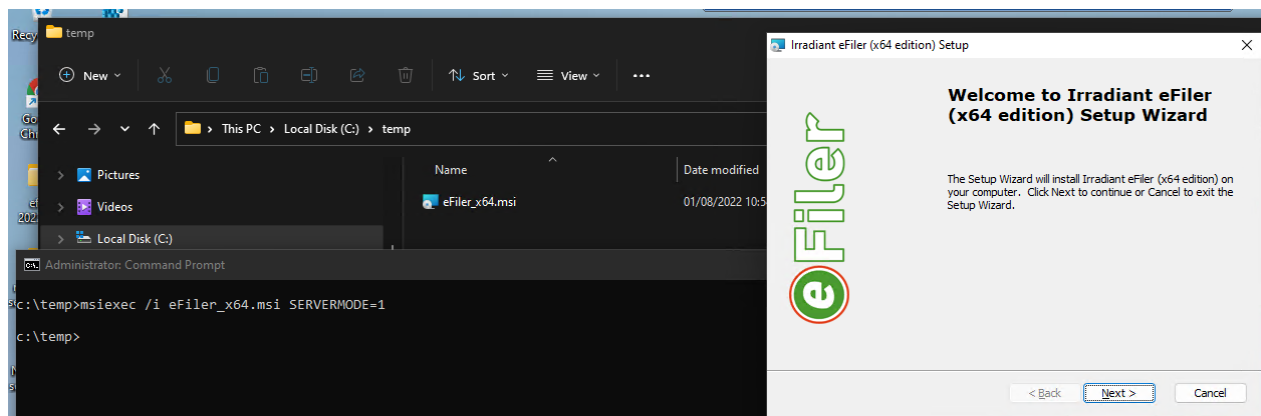
The index is consistent and likely to always be current (as the server is always on)

Clients working over a VPN do not need to create their own local index

Installation -

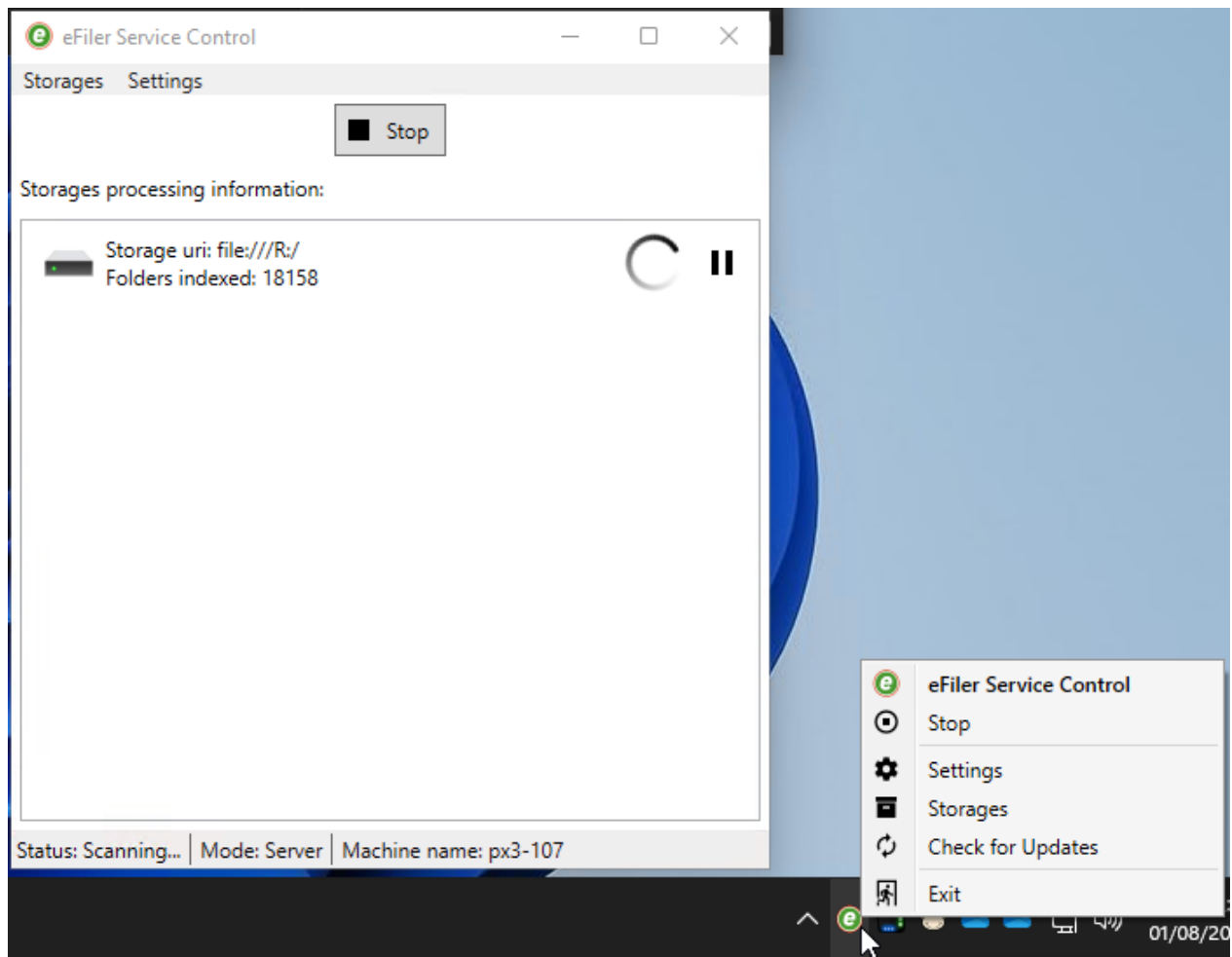
Using the same default installation file from our website run the installer from an elevated command prompt using the following syntax -

```
msiexec /i eFiler_x64.msi SERVER_MODE=1
```



Once installed you will find the application running in the system tray.

Continue to add storage locations by adding the UNC paths or mapped drive letters required by the users. Note mapped drive letters will only work if they match those on the clients computers and the server remains logged in.



To provide locations when the system is logged off add locations using the UNC path that is mapped to the client computers. Where a mapped drive matches the UNC path index provided by the server it will be used by the client.

Alternative (less preferable) method to map drives when logged out -

In order for mapped drive locations to be available to the service when a user is logged out you need to map relevant drives using psexec as follows -

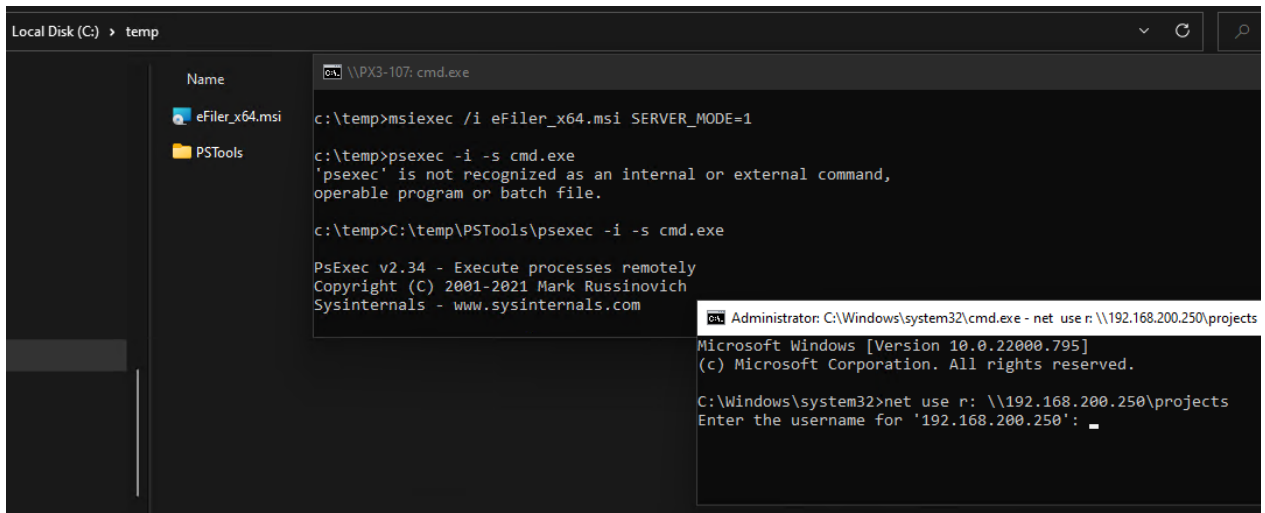
[Download PSEXEC here](#)

Run the following command from the PSTools folder (using an elevated command prompt) -

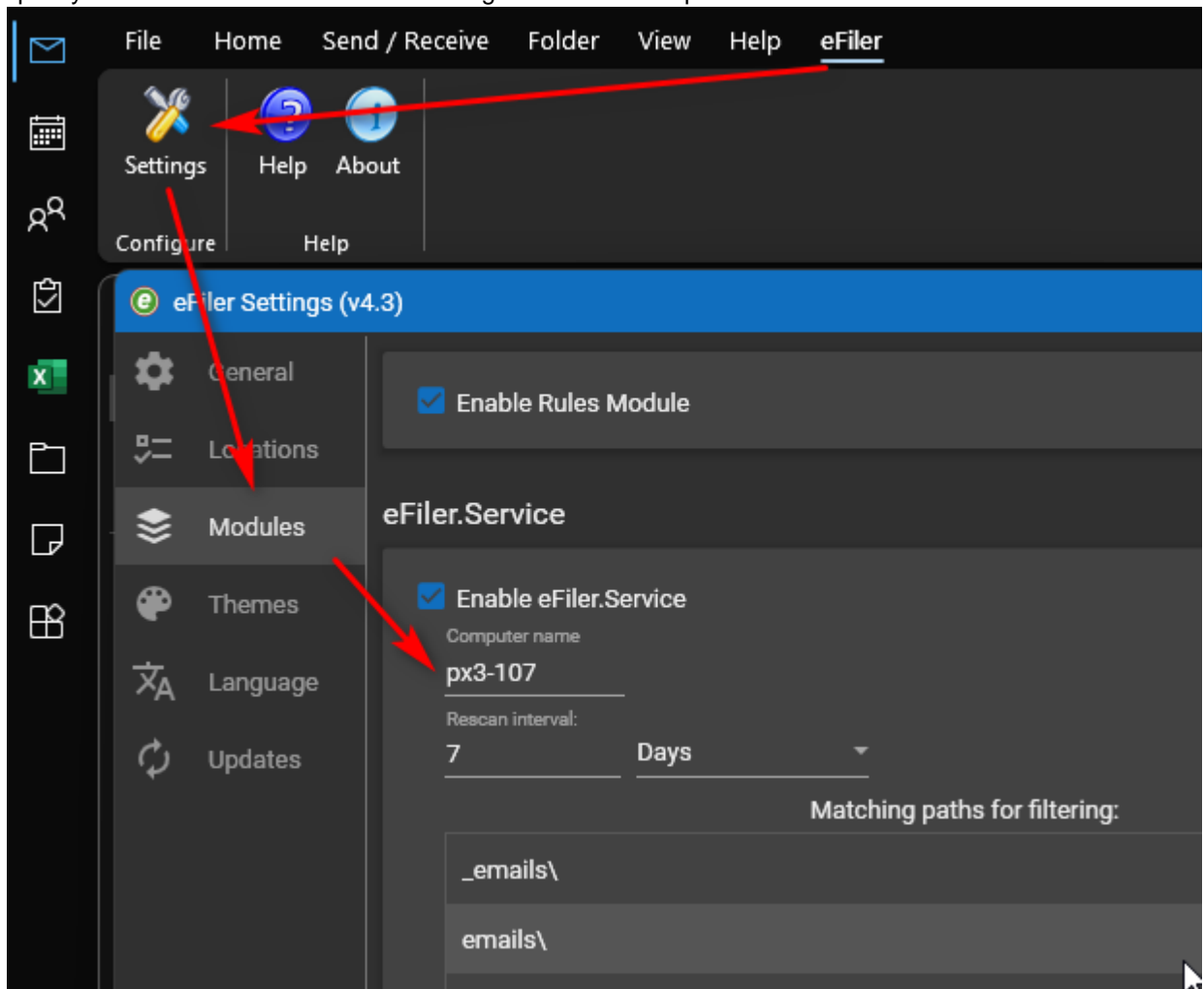
```
psexec -i -s cmd.exe
```

In the popup window that follows map any relevant drive letters that the users require indexed (example) -
net use r: \\192.168.200.250\projects

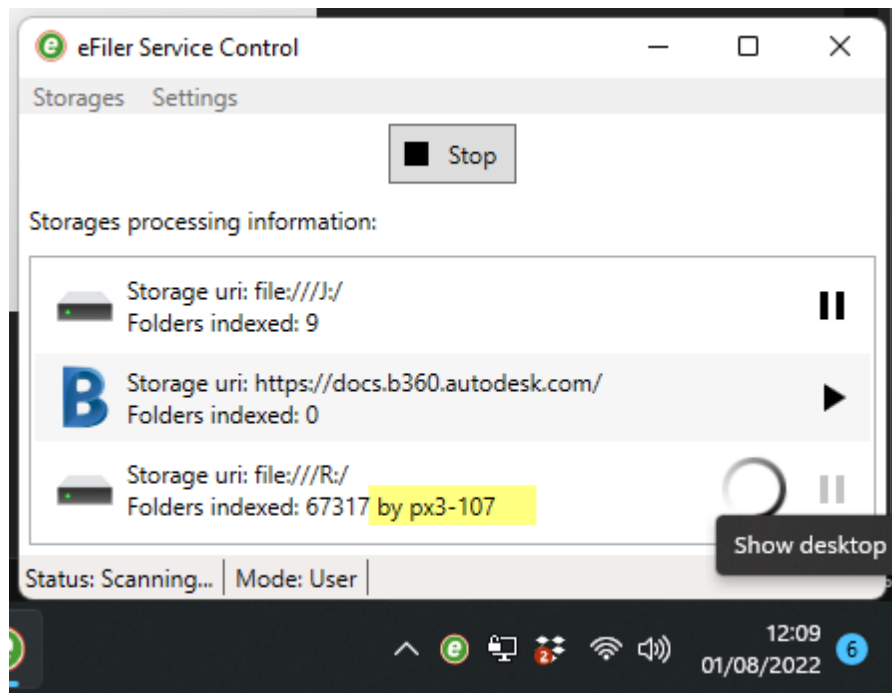
When prompted provide user credentials with access to read and traverse folders. Note this drive mapping will appear for all users who log into the server.



Specify the server name within eFiler settings on a client computer -



Once a server name is specified (and available) check the clients system tray application and you should see it is being provided by the server -



Notes -

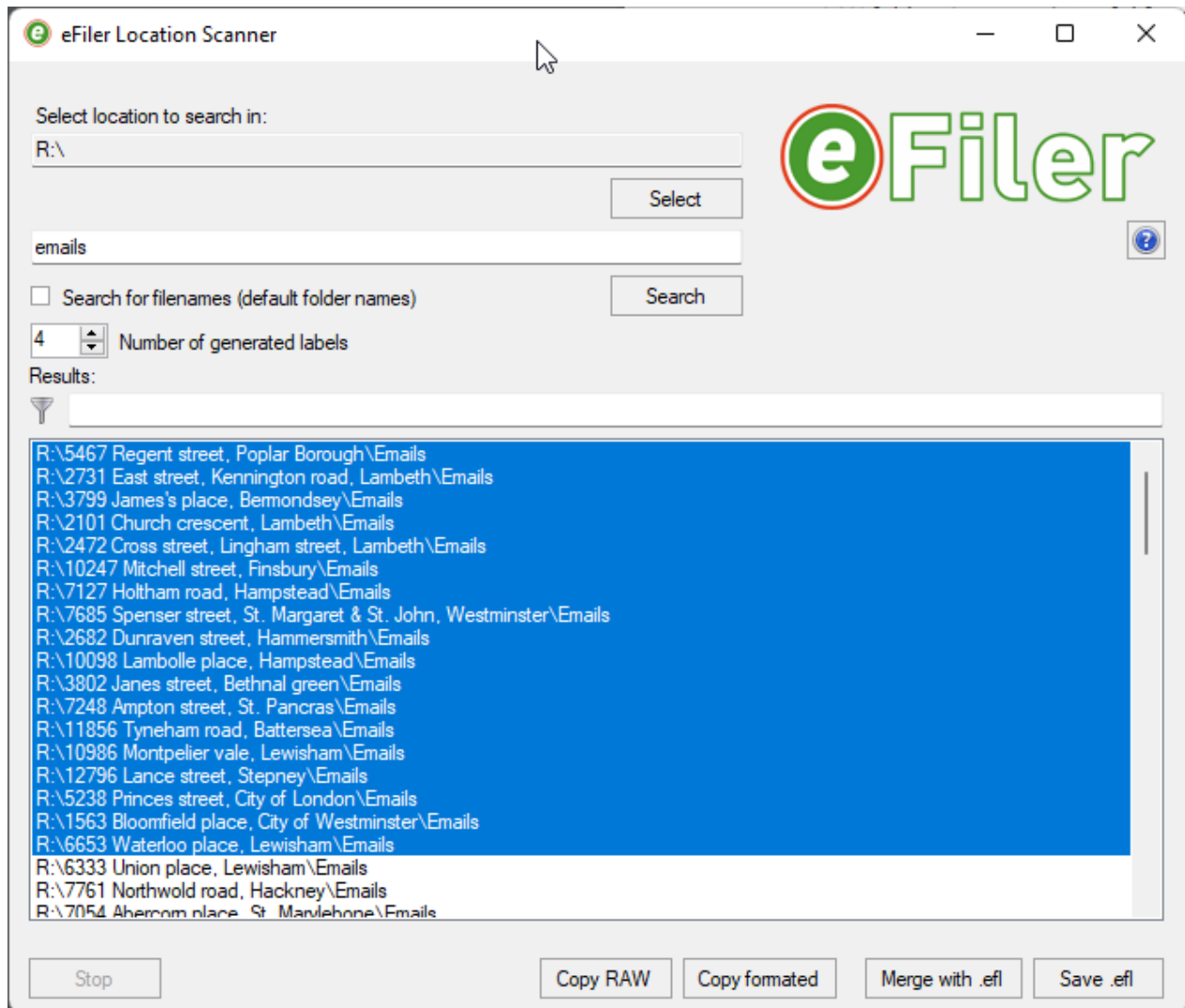
- If the server is not available or does not provide a matching drive letter or UNC path mapping the local client indexing service will take over
- If you wish to prevent the local computer from indexing certain locations please add these as blocked paths in the eFiler Admin settings (access eFiler admin settings holding CTRL, ALT and entering license password)
- The computer/server should have a fixed IP address. DNS hostnames can also be used.
- Please remind users working from home to connect to the VPN before opening Outlook.
- If the server service is not located on the same computer as the data volume being indexed provide relevant credentials to the Windows service (by default it will run under the system account)
- Mapped drive letters on client computers should be mapped with the correct case sensitivity as they are shared from the server
- If you are indexing multiple remote servers or NAS devices which are not connected by the same Active Directory you should set the service to run under a specific user account and ensure that all servers have the same username and password specified for persistent access.
- This feature is available to eFiler+ customers

Additional tools

Location Scanner

Location Scanner can be used to find and add folders containing emails to eFiler's location list in bulk.

Location scanner can be found within the Windows start menu under Irradiant eFiler sub menu.



To use location scanner -

1. Specify a location to search in
2. If you are searching for folder names simply type the folder name you are looking for.
3. Specify how many labels you want to import into eFiler
4. Use the filter box to further filter the results if required
5. Select all or a batch of results
6. Select 'Merge with .efl' to merge the selected locations into your current eFiler locations

Additional features

Copy RAW - Copies the selected locations as a list to the clipboard

Copy Formatted - Copies the selected locations formatted to suit the .efl file to the clipboard

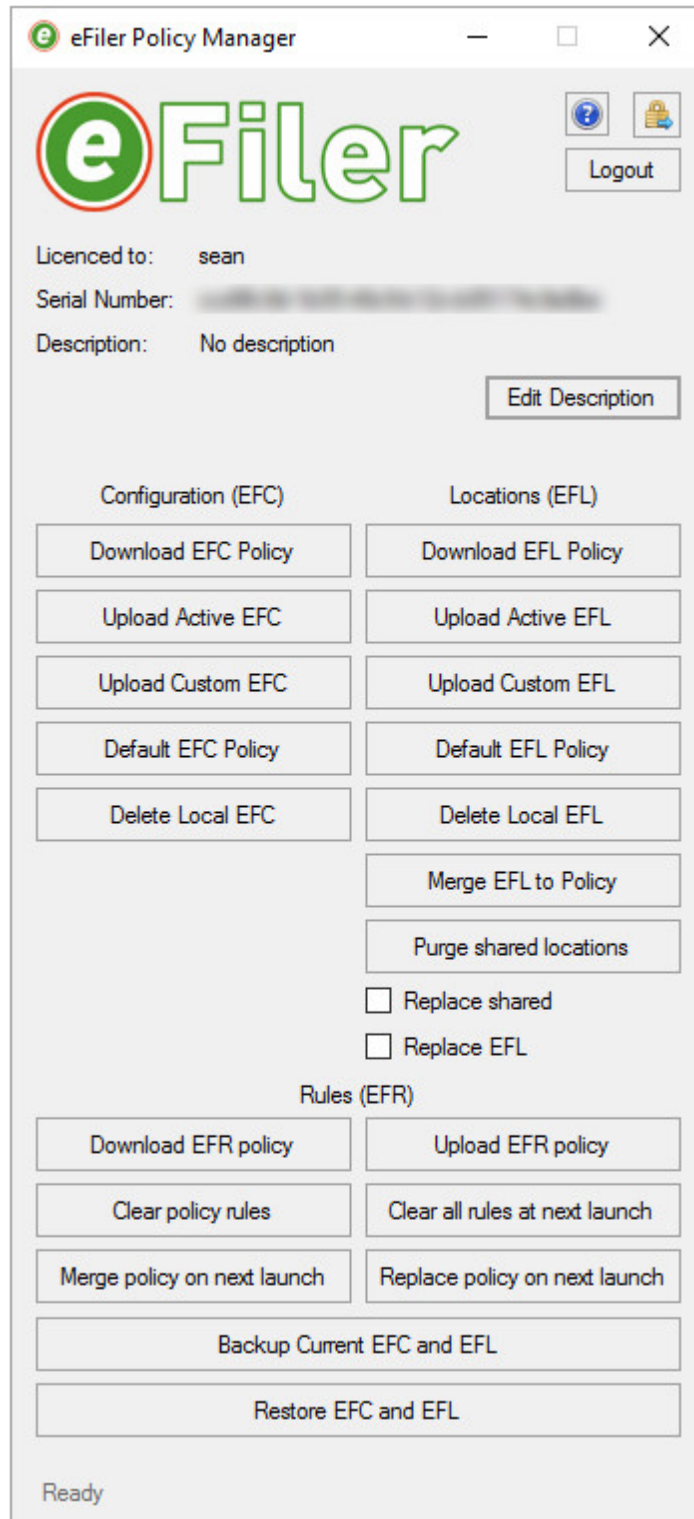
Save .efl - creates a new .efl file and prompts for a location for it to be saved in

Tip

If you want to find existing folders which already contain .msg files enter .msg in the search box and check the tickbox to search for filenames instead of folders

Policy Manager

eFiler Policy Manager makes it easy to configure and deploy settings and common locations across your office. By interfacing with our cloud based licence server Policy Manager allows you to replace or create policies which will be downloaded based on a users registered serial number. It is important to remember that multiple serial numbers can be issued allowing you to customise the experience for different departments or teams within your office.



You can access Policy Manager from the Start menu under the 'Irradiant eFiler' program menu.

To begin, enter the licence number you wish to manage and the password provided at the time of purchase. If you do not remember these please contact us and we can reset them.

It is important to understand the acronyms and concepts used –

EFC Policy – this refers to the .efc file which controls the configuration of eFiler. This includes settings such as 'Delete emails after filing' and 'Prompt to save sent messages' and all other configurable options found in the settings dialog within eFiler.

EFL Policy – this refers to the .efl file which controls which locations are presented to you each time eFiler is restarted.

Concept –

Our licence server acts as a central hub from which network policies are deployed. Each time a copy of eFiler starts it checks our server to find updated configurations and or locations and merges these into our local eFiler settings. We 'Upload' the proposed configurations to the licence server and we can also 'Download' the existing Policy files to a chosen local location for our records.

Simply described the buttons perform the following functions –

Download EFC Policy – Downloads the EFC (configuration) file stored on the server and prompts to save it locally.

Download EFL Policy – Downloads the EFL (locations) file stored on the server and prompts to save it locally.

Upload Active EFC – Uploads the current windows users eFiler configuration and applies it to the server.

Upload Active EFL – Uploads the current windows users eFiler locations and applies it to the server.

Upload Custom EFC – Select an EFC file from the local computer/network and upload it for deployment.

Upload Custom EFL – Select an EFL file from the local computer/network and uploads it for deployment.

Default EFC policy – resets the server to a default policy.

Default EFL policy – resets the server to a default policy.

Delete Local EFC – Deletes the locally logged on users eFiler configuration file.

Delete Local EFL – Deletes the locally logged on users eFiler Locations file.

Merge EFL to Policy – Allows the user to merge his current eFiler locations into the current policy on the server.

Backup Current EFC and EFL – Saves a backup of the current users eFiler settings and locations to a local zip file

Restore EFC and EFL – Allows the current user to browse for and restore previous local configurations.

Additional functions –

Logout – returns the user to the login screen to manage an another serial number.

Change password – change the password to one that you will remember! If you have lost your password please contact us to facilitate a password reset.

Edit Description – Each serial number can be given a unique customer description to make it easy to differentiate between different licences.

Tips

Policy can also be controlled and managed through the User interface. To access the administration mode of eFiler settings press and hold CTRL and ALT on the keyboard and click on the cog icon in location manager. You will be prompted for your licence password.