eFiler-User-Guide

Table of contents

Introduction

eFiler is an addin for Microsoft Outlook, enabling users to file emails alongside project data on local or cloud storage providers. The intuitive search tool allows users to quickly locate emails they (or their colleagues have saved).

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

What's new

Version 5

- Autodesk - Customer applied API key and secret (eFiler+)
- Confirm recipients and attachments on sending emails (eFiler+)
- Tiered product licensing with eFiler and eFiler+. Compare features here. Suitable for Classic Outlook
- Also now available as eFiler365 and eFiler365+ (web application suitable for all versions of Outlook).

Feature comparison

Standard Features of eFiler

- Save emails as standard .msg files (native to Classic Outlook) alongside other data
- Save one or many emails in one operation
- Save email attachments separately when filing emails
- Folder export - export the emails and all sub folders and associated emails in one operation
- Peer to peer location sharing
- Add optional references to filed emails
- Fully customizable file and attachment file name templates
- Autopilot automated filing and search suggestions
- Filter and jump to locations using Autopilot
- File to or search sub folders of a specified location
- Search one of more folder locations at a time
- Powerful intuitive index based search tool
- Granular search filters
- Export search results to CSV reports
- User editable Location tags makes it easy to manage and filter locations
- Cloud Sync - drag and drop email filing templates with the option to retain a copy of filed emails
- eRules - Outlook rules extension to file emails automatically based on specified rule criteria
- Multi lingual user interface - select from one of 15 languages
- Location scanner
- Basic Email Support

Additional Features available in eFiler+

- Policy settings - manage policy settings centrally for a consistent deployment. No server or central share required
- Access Cloud storage directly. Including access to BIM360, Autodesk Build, box, Dropbox, Google Drive, OneDrive, SharePoint, Webdav locations
- See where an email was filed to and open the location of the filed email
- Automatically prompt to save attachments separately
- Save attachments hotkey to save attachments from multiple emails in one operation
- Save attachments from search results (search context menu)
- Be selective about which attachments are saved
- Customisable attachment file name template
- Consider third party name in Autopilot suggestions
- Enable filing to multiple locations at once
- Save and Search using the .eml or .msg file formats
- Index and search Outlook Mailboxes with eFiler Search
- File emails from mailbox search results (with full location manager access)
- Client/Server based eFiler Autopilot service (reduces service indexing to a single master machine)
- Move filed emails to Cloud Sync folders
- Create Cloud Sync folders automatically based on email filing
- Confirm recipients and attachments on sending emails
- Crossgrade path to eFiler365
- Priority Support

eFiler365 and eFiler365 is a web application for all versions of Outlook - for a comparison of features please review the manual for eFiler365

Installation

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.

System requirements

eFiler for Microsoft Outlook is a client side application and requires the following components for successful operation and support.

Operating Systems Supported
Windows 11, Windows 10, Windows 8* & Windows 7* (32 or 64 bit installations)
Windows Server 2008 R2 and above. (where used for remote desktop services)

Microsoft .NET Framework 4.8 or newer (this is normally pre-installed on Windows 11 and provided with updates on Windows 10)

Both Operating System and Microsoft Office Suites should have the latest available updates applied and be fully activated for support.
* Windows 8 and Windows 7 have reached end of life and are no longer supported by Microsoft. We provide limited support for End of Life Operating products.

Microsoft Office
Microsoft Outlook 2010 and above including Office365 Outlook desktop client (32 or 64 bit installations).
If during installation no supported version of Office is detected please follow our troubleshooting steps here.

Supported Email accounts
We recommend Microsoft Exchange / Office 365 or Google Workspace email hosting - all of which provide enterprise features and are fully supported by eFiler.
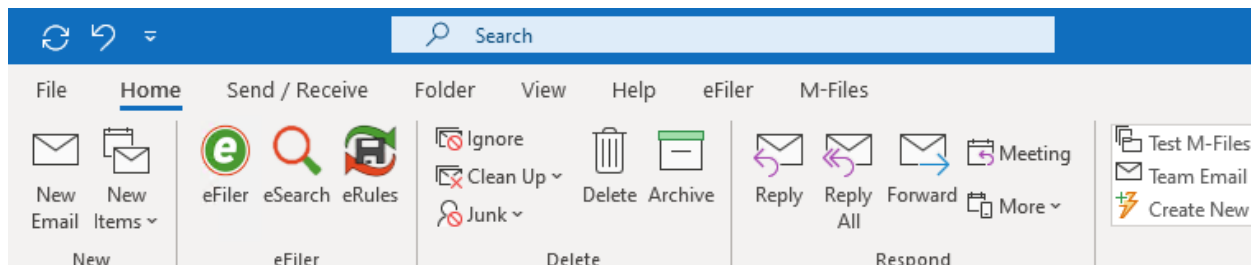Limited support may be provided on POP and IMAP accounts

Hardware Requirements
Minimum 2.5GHz processor
Minimum 8gb RAM (16Gb recommended)
eFiler is reported to work as expected on the latest Apple M chips.

Single User Installations

1. Always visit our website and download the latest version of eFiler.
2. Ensure Outlook is closed and you have permissions to install software on your computer (local administrative permissions required)
3. Run the installer - select the 'Typical' installation.
4. Wait for the installer to finish before re-opening Outlook.
5. Open Outlook to find the eFiler icons on the Outlook ribbon menu.

If the installer does not complete as expected, or the icons do not appear on the Outlook ribbon please visit our troubleshooting section.

The trial and licensed versions of eFiler share the same installer. Licensed versions are activated by applying a serial number for continued use.

Learn how to activate eFiler here.

Network (Multi User) Deployment

Installation

eFiler is provided as a standard MSI package which can be deployed silently by Active Directory, Intune or 3rd party deployment tools.
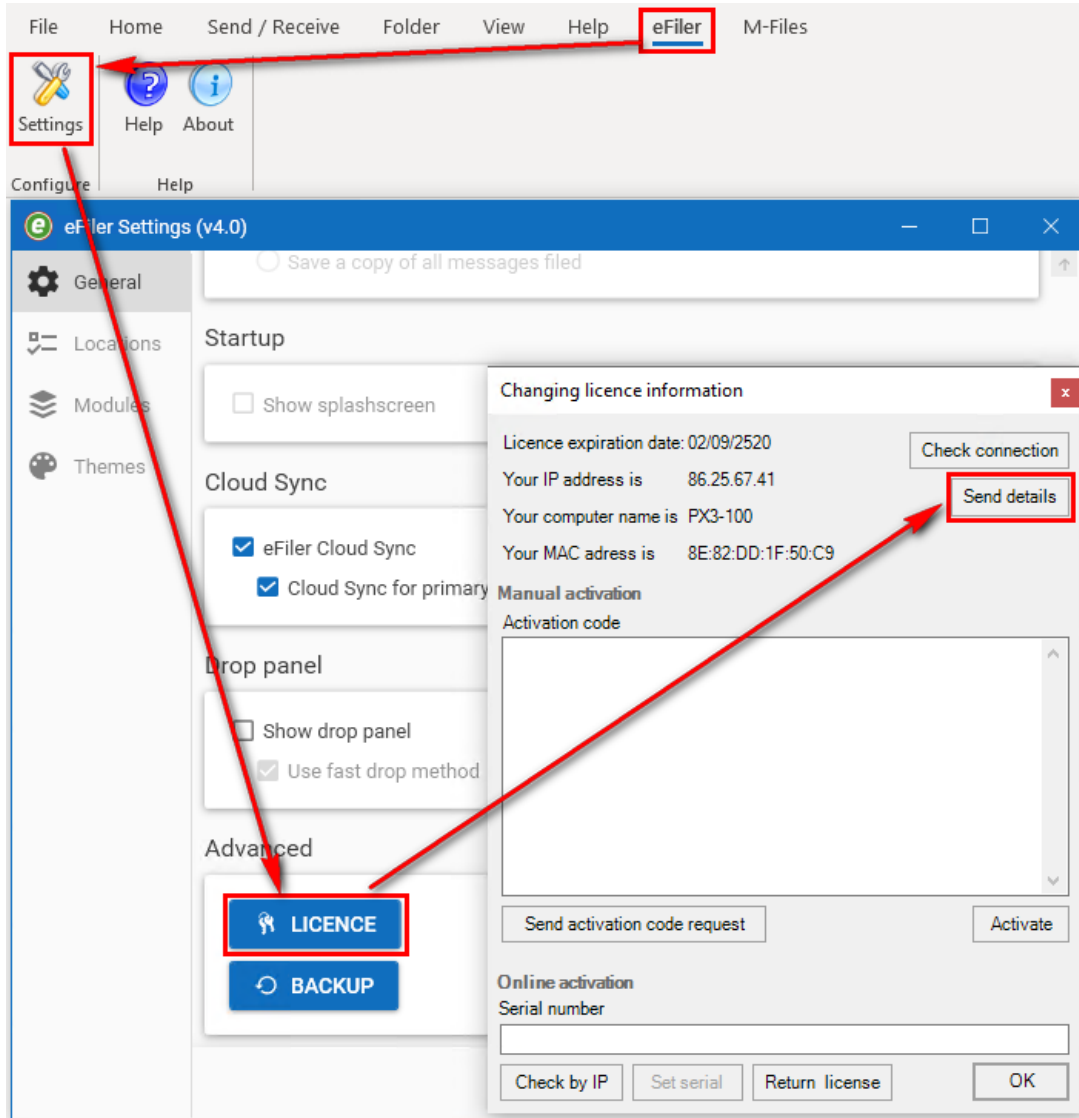
Central configurations

Once you have configured eFiler to meet the requirements of your organization you can easily control and deploy the configuration to all users on the same license. Learn more here.

Getting help

In order to be eligible for support users must be on a current trial / valid subscription or support contract.

When asked, please go into settings and select 'Send Details' to send the logs and current configurations to our support team.

Contact our support team by email at support@efiler.co.uk describing the issue you are facing and include any relevant screenshots.

We are able to provide remote access support to customers with valid support contracts.

Getting Started - Video Guides

Useful videos to guide you through the features of eFiler.

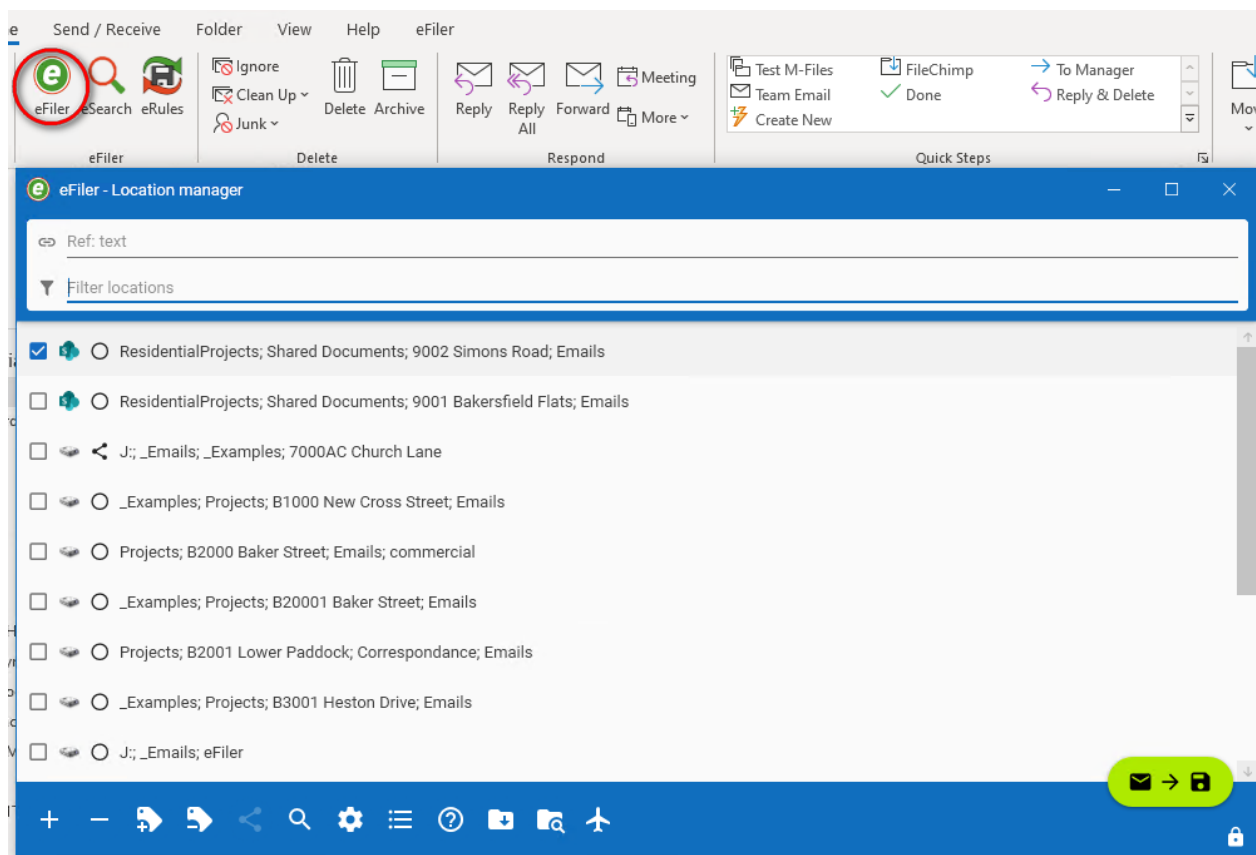[Filing emails - working with Location Manager](#)

[Finding emails - tips on using eFiler Search](#)

[Adding a Dropbox Location](#)

[eFiler - BIM360 Integration Video Link](#)

Adding a SharePoint or OneDrive Business Location

Location Manager - Filing Emails

Location manager is accessed from the Outlook Ribbon menu by clicking on the Icon as shown above

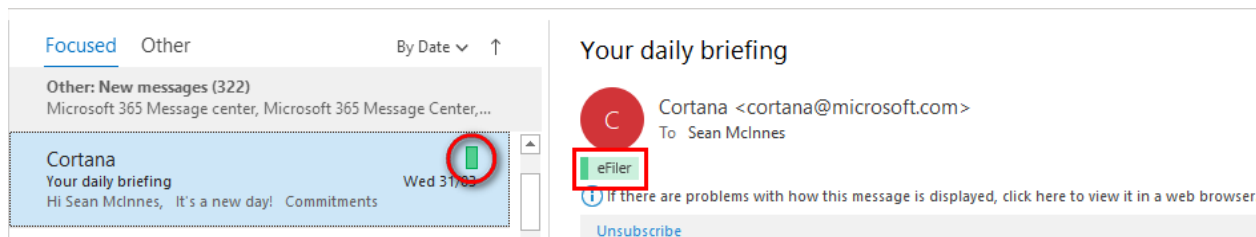## File a single or multiple emails

To file one email -

1. Select the email(s) you want to file. You can use CTRL and select multiple emails in Outlook at once
2. Click on the eFiler Icon in the Outlook ribbon menu
3. Instantly type to filter or Select a location to file the email to
4. Double click or select the icon to save your email

To file multiple emails at once -
1. Select one or more emails within Outlook. To select mutliple emails press and hold the CTRL key and select random emails for filing.
2. Click on the eFiler Icon in the Outlook ribbon menu
3. Instantly type to filter or Select a location to file the email to
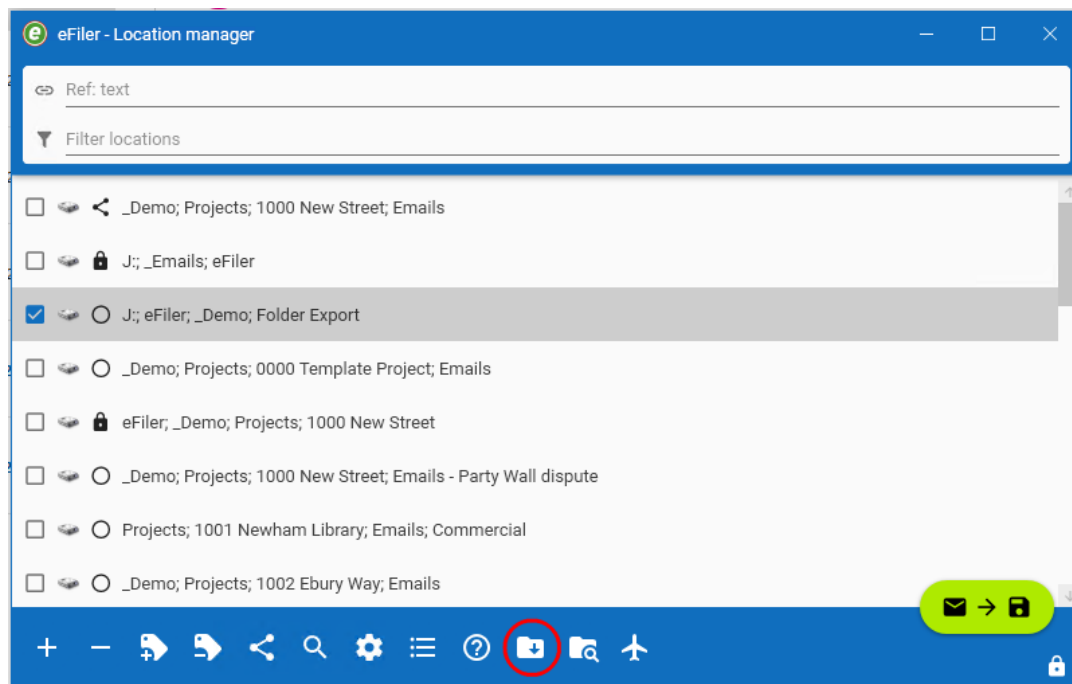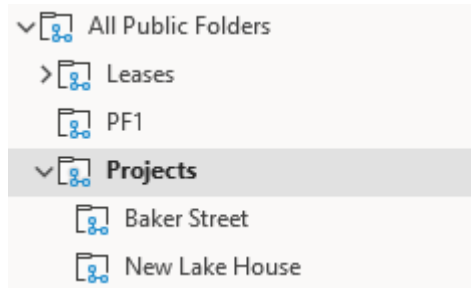4. Double click or select the icon to save your email

Filed emails are marked with the green eFiler category mark as a visual confirmation of filing success.

File all emails in a folder

Folder export allows you to easily file all emails in a folder and its sub folders in one operation. Folder export is efficient at filing emails from shared mailboxes, public folders and email archives.

1. Select the folder you want to export
2. Open location manager
3. Select the destination folder location for filing
4. Click on the folder export icon and confirm to file all emails

Adding Filing Locations

To add a location -

1. Click on the + option in location manager
2. Select the correct data store in the location browser (or add a new data store)
3. Navigate the folder structure to select an existing folder or type to filter for a location
4. Complete the action by selecting OK to add the location to your location list.

Tips	You can also add locations from the Windows Explorer context menu
	When you use Autopilot to file an email it will add the location to your list automatically

Adding a new Data Store

If you need to add a new target data store (this could be a mapped drive letter / SharePoint or Cloud Storage provider) you can find the option when adding a location in Location manager.

Follow the Storage Wizard to connect a new data store, providing authentication details where requested.

Note - Cloud Locations are only available to eFiler+ subscription customers

Adding a SharePoint location

eFiler can file (and search) emails directly to SharePoint without the need for a user to sync folders locally.

1. From the Storage Wizard select the option to connect to SharePoint.

2. Provide the Sharepoint URL (visit Sharepoint online and copy the URL from your browser).
    Examples -
    Your main SharePoint URL https://irradiant.sharepoint.com (select the checkbox to index all sub sites)
    or
    A specific SharePoint Site like https://irradiant.sharepoint.com/sites/9000OrchardWay

3. If you have selected the root folder, select the option to index all sub-sites

4. Once the connection is established you will be able to select or filter for locations to file to.

Note -

Cloud Locations are only available to eFiler+ subscription customers

Autopilot Discovery of SharePoint locations takes up to 24 hours from when the SharePoint Site is first created.

This is the time required for SharePoint to provide the site details to the Autopilot indexing service

Adding a OneDrive for Business location

Adding a OneDrive for Business location follows the same steps above to add a SharePoint location. The URL required must be set to the user path as specified by Microsoft

The URL for a user's OneDrive is usually in the following format:
https://<tenant name>-my.sharepoint.com/personal/<user principal name>.

For the user principal name (UPN), any special characters such as a period, comma, space, and the at sign ("@") are converted to underscores ("_").

Example - rsimone@contoso.com would require a URL of https://contoso-my.sharepoint.com/personal/rsimone_contoso_com

Please read more here

Adding an ACC / BIM360 Project Location

eFiler can file (and search) emails directly to Autodesk BIM360 without the need for a user to interact with the Desktop Connector.

Open Location Manager and select the + Sign to add a new location
From the location browser dropdown location selection, select + Add new storage
From the Storage wizard, select BIM360 and next
Click Allow after reviewing the permissions scope required by eFiler
Click Finish to complete the wizard
Expand the list of available BIM360 Projects and potential filing locations OR type to filter for an appropriate filing location (allow some time for initial indexing before filtering)

Note - Cloud Locations are only available to eFiler+ subscription customers
eFiler - BIM360 Integration Video Link

What is Autopilot?

Autopilot suggested filing locations are offered when a match is detected based on the email subject (and or sender / recipient names) and the available filing locations. If no suggestions are available it means that Autopilot is not able to make a useful comparison between the subject line and the available filing locations.

If you make use of an Autopilot suggested filing location it will be added to your locally available list of filing locations in Location Manager.

To adjust the accuracy of Autopilot suggestions we recommend you add relevant filters. Multiple filters can be added to the eFiler Service in line with your local policy (to match specific folders only). To add filters open the eFiler addin settings (cog icon in location manager) and select modules.

Autopilot relies on the eFiler Service Control application which is accessed from the system tray. Users can pause or resume indexing of any location by selecting the pause/play icon. Administrators can block paths or centralise indexing for common locations (please contact support for further information)

Note - in order to use Autopilot the relevant storage volume must first be connected to eFiler. See also
Troubleshooting Autopilot

Removing Filing Locations

To remove a location click on the - option in location manager
Select the location or locations you would like to remove.
Click on - to delete the locations from your list.

You can also remove locations from the context menu as shown above (right click a location to access the context menu)

Note	You cannot remove policy locations (these are shown with a padlock icon and are applied by a system administrator)

Removing a Data Store

If you need to remove a data store you can select the option to delete Storage from the location browser window.

1. Open Location manager
2. Click + as if to add a location
3. Select the data store you wish to remove
4. Click on the recycle bin to the right.

All locations that were related to this storage connection will be removed from your locations list

Note	All locations that were related to this storage connection will be removed from your locations list

Clean up invalid locations

Each time Outlook is restarted eFiler will do a comparison of known locations based on its Autopilot index service. If a location retained in Location manager has been moved or deleted and is no longer valid for filing to eFiler will display a warning. Click the warning symbol and confirm if invalid locations should be purged from Location manager.

Purging locations cleans up the list of available filing locations, eFiler's configuration files and removes any redundant indexes, optimizing local storage space.

You can also check to make sure your index is up to date and re-index a location if you wish (Click once to pause a location index and click again to restart indexing) -

Filtering locations

Location manager can work with thousands of locations. Locations are automatically suggested based on previous filing habits. It is possible the location you want to file to is not at the top of the list. If this is the case the fastest way to select the location is to type to filter for the location.

When you open Location manager the cursor will automatically be positioned for you to type to filter.

To clear the filter select the X to the right hand side

Tip	You can also filter by tags

Working with Labels

It can be useful to tag locations with familiar labels. By default eFiler can create labels each time a location is added to your list. When filtering for a location, both the UNC path and the labels are considered.

Add and remove labels using the options provided in location manager (note these options are also available on the context menu)

Labels make it easier to read and filter filing locations.

Local, Shared and 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 As shared locations are shared to all users on the same license this feature is not available to trial users.

Prompt to Save Sent messages

Encourage users to file sent messages as they are sent. Within eFiler settings (General Settings) you can specify if you would like to be reminded to file sent messages. When you enable this feature you will be prompted to save each email when you click Send.

Note the options available depend on the settings - send the email without saving / save and send the email / or click the X to return the the email for further editing.

Adding a Reference to Filed emails

When filing emails there is an option to add a filing reference. This is a manual user entry which can be mandatory or optional.

The reference is saved into the file name (please see the file name template options)
Within Search you are able to filter emails by reference.

Saving Attachments

Select any email containing one or more attachments
Proceed to location manager. Within location manager click on the attachment icon
Review the attachments to be saved. Select a destination folder and click on the save icon to save the attachments or close the window to exit without saving the attachments. If you are saving attachments you are sending (by using the prompt to save sent messages popup), and have included the date and time in your attachment file name template we will apply the current date and time (the actual sent date and time is not determined until after the message is sent).

Advanced options for eFiler+ Customers -

- Use a hot key to go directly to save attachments after selecting multiple emails in Outlook)
- In settings, select the option to prompt to save attachments separately. Where an email contains attachments and the user files the email they will be prompted to save the attachments automatically.
- Be selective about which attachments are saved

eFiler Search - Finding Emails

Where to find search

eFiler search is accessed from the Outlook Ribbon menu or by selecting locations in location manager and selecting the option to search the location(s)

How to search for an email

The quickest way to find emails using eFiler's powerful search engine is to start by entering a few words or names into the omnibox.
Notice how the results are colour coded for easy reference.
By default this will generate results for emails which contain either of the search terms entered.
To refine the results further click on the filter icon in the top left corner

Narrow the search to require results to contain all search terms.

Apply one or more specific filters (when setting specific filters results generated must match specific criteria entered).

Add and adjust filters as required to build and modify your search with instant results.

Double click to open the saved email in its original format.

Additional options are available from the right click context menu to print / copy / move / email or open the location.

★ ★ ★ ★ ★	Re: [Case #:24298046] - problems with security defaults	19/02/2021 1	Sean McInnes
★ ★ ★ ★ ★	Message Center Major Change Update Not		365
★ ★ ★ ★ ★	RE: 121012825001184 (no access to creat		nic
★ ★ ★ ★ ★	Re: Re: 120080725000834		nes
★ ★ ★ ★ ★	121012825001184 (no access to create pc		nic
★ ★ ★ ★ ★	Message Center Major Change Update Not		365
★ ★ ★ ★ ★	Weekly digest: Microsoft service updates		365
★ ★ ★ ★ ★	Weekly digest: Microsoft service updates		365
★ ★ ★ ★ ★	Weekly digest: Microsoft service updates		365
★ ★ ★ ★ ★	Re: 120080725000834		nes
★ ★ ★ ★ ★	Weekly digest: Microsoft service updates		365

Open document(s)

Print from preview

Select all   Ctrl+A

Copy to   ▶

Move to   ▶

Email Attachment(s)

Email Link(s) to document(s)

Reset search filters

Open filing location

Export results to CSV

Search Multiple locations

There are 2 different ways to start a search across multiple location

Option 1 - Starting in Location Manager

Select the locations and click on search from the icon menu or from the context menu option.

Option 2 - Starting in Search

Within the search window, open location manager. Select the locations to search and hit enter or click on the search icon.

When viewing the results you can click the drop down to see exactly which locations are being searched. To search a different location simply select the new location from the drop down list presented.

To filter for a location to search, click on the drop down and type to filter available locations to search

Tip   It is possible to enable eFiler to search sub folders of the selected location automatically. Please see Search settings in Modules

Search Mailboxes

eFiler+ customers can Search Outlook Mailboxes with the same familiar search interface. Specify which mailboxes to search within Settings, Modules, Mailboxes. Select the mailbox to search from the search tool.

Useful features -
The eFiler search Context menu will allow you to Move / Copy or File Emails directly from the search results. In each case emails filed, copied or moved from Outlook will be marked as filed within Outlook. Filter search results for batch filing emails which match specific criteria. When searching a mailbox lookout for the additional filters available to filter for filed, un-filed or all messages.

eFiler Rules

eFiler Rules helps users to file repetitive emails based on specific rule criteria.

Click on eRules on the Outlook Ribbon menu
Click on the + Icon to add a rule
Select a location you would like the emails to be filed to
Set a rule name
Specify criteria to append to the rule. You can add one at a time or specify multiple criteria at once.
Once you are happy to proceed select OK
You are returned to the rule manager - check the state and direction and if you wish to leave a copy of the filed message.

To edit or remove an existing rule click on the 3 dots and select edit or remove.

See troubleshooting Outlook rules if the eFiler Rules option is not available (greyed out)

Tips	We recommend limiting rules to your most frequent filing patterns.
	Remember - as rules apply to either incoming or outgoing messages you may require 2 rules per project.
	You can keep a backup of your rules using our Rules export and import features found in the bottom of eFiler Rules Manager

Export / Import eFiler Rules

Use the rules export / import features to keep a backup copy of your **eFiler rules**. This feature can also be used to transfer a set of rules from one computer to another.

Open eFiler Rules Manager

Select the export rules icon (far right), select a location and save the rules.

To re-import the rules, select the import icon.
- Select overwrite to replace existing rules (where duplicates are found)
- Select merge to merge changes (skipping duplicates)

If you are also making use of **Outlook rules** these can be exported / imported by following these steps.

- Click the File menu.
- Click Manage Rules & Alerts.
- Click Options.
- Click Export Rules.
- Select the folder where you want to save the rules file, and then name the file.
- Click Save.

eFiler Cloud Sync

Cloud Sync allows users to drag and drop emails to their favorite locations for filing. In order to configure Cloud Sync it must first be enabled in General Settings. Once enabled you will see the eFiler Cloud Sync folders appear in Outlook (these should sync to mobile devices and Outlook web access on compatible accounts)

Next, go to Cloud Sync Template manager. Select a location, add an optional reference and add the location for use by Cloud Sync. The locations will appear under the eFiler Cloud sync folder in Outlook and are now ready for filing. Select one or more emails and drag and drop them into the relevant folder for filing.

eFiler+ license holders can select the optional settings to move filed emails to Sync folders and to create sync folders automatically (this will automatically place filed emails into the relevant Cloud Sync folder automatically)

Extending this functionality you may also enable the drop panel to create a floating panel that can be positioned anywhere on screen. Select one or more emails and drag and drop onto the drop panel for filing. Only cloud sync template locations are offered for filing.

Tips   To file an email from your mobile device move the email into the relevant Cloud Sync folder. If eFiler is active on your computer the change will be synchronized and the email will be filed.

eFiler Service

The eFiler service is a stand alone application which runs in the system tray. By default the service will operate in standalone mode to ensure a seamless operation for a single user.

The service monitors available folder locations. The folders are offered to users who filter to add a location, or where a user gets an autopilot suggested folder location.

eFiler Service Control

The eFiler Service can be found running in the system tray. Double click to view the locations being monitored.

Storage volumes are automatically added to the eFiler service to be scanned. Each location scanned shows the total number of folders found. You can control which storage locations are included in eFiler Autopilot results (and are re-scanned) by toggling the play/pause icon.

See also Autopilot settings to control the number of results shown.
Configure filters & specify a manual re-scan interval to refine Autopilot.

Troubleshooting & Administration

eFiler Outlook ribbon icons are missing

If the eFiler ribbon icons do not appear when you open Outlook it is likely that Outlook has disabled the addin. There are several steps to take to correct this.

Option 1

Download our easy fix from our website using this link.
Ensure you are able to see file extensions in Windows Explorer (you may need to enable this in Windows Folder Options)
Locate and rename the file LBR.key by renaming the file extension from .key to .reg
Double click the file LBR.reg
When prompted allow the file to make changes to the registry.
Re-open Outlook and eFiler should reappear on the Outlook ribbon menu.

Option 2

Open Notepad on your computer.
Copy and paste the entries below into a new Notepad document.
Save the file as eFiler.reg
Close Notepad, locate the saved file and double click the file eFiler.reg
When prompted allow the file to make changes to the registry.
Re-open Outlook and eFiler should reappear on the Outlook ribbon menu.

Windows Registry Editor Version 5.00
[HKEY_CURRENT_USER\Software\Policies\Microsoft\Office\16.0\Outlook\Resiliency\AddinList]
 "eFiler.COM.Outlook2010.Addin2010"=dword:00000001
[HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\Outlook\Addins\eFiler.COM.Outlook2010.Addin2010]
 "LoadBehavior"=dword:00000003
[-HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Outlook\Resiliency\DisabledItems]
[HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Outlook\Resiliency\DisabledItems]
[-HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Outlook\Resiliency\CrashingAddinList]
[HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Outlook\Resiliency\CrashingAddinList]
[HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\16.0\Outlook\Resiliency\DoNotDisableAddinList]
 "eFiler.COM.Outlook2010.Addin2010"=dword:00000001

eFiler Outlook ribbon icons are greyed out

There are 2 common causes for the eFiler ribbon to be greyed out -

Expired or invalid licence -
Check your licence status. From the top Outlook menu select eFiler. If the settings icon is available go into settings and Licence and re-apply your serial number. Further instructions on activation can be found here.

Corrupt or inaccessible data store -
eFiler is unable to make a connection to one or more mailboxes attached to your Outlook profile. Review each connected mailbox, disconnect any data stores not directly related to your email account. If the issue persists request support from your IT team to create a new Outlook mail profile.

Installation logging

If the installation doesn't go as planned you may be required to generate a verbose log to help identify what went wrong during the installation process.

Take the following steps to generate an installer log file -

1. Ensure Outlook is closed.
2. Download the latest installer from our website.
3. Save the installer to a local folder (eg. C:\temp\eFiler.msi)
4. Open an **elevated** command prompt (run as administrator) from the start menu
5. Type (or copy/paste) the following command
   msiexec /i c:\temp\efiler.msi /lv c:\temp\efilermsi.log
6. Locate the log file which was generated as c:\temp\efilermsi.log
7. Review the log file for errors or contact support by email with a copy of the log file for review explaining which steps were completed and provide any relevant screenshots.

Uninstall eFiler

To remove eFiler from your computer -

● Run the same installer you used to install eFiler and select the option to uninstall when prompted

● Go to Control panel, select 'Programs and Features'. Search for Irradiant eFiler (x64 edition) or Irradiant eFiler (x86 edition). Select the listing and double click or select the option to Uninstall from the menu.

Failed Installations

If this is the first time installing eFiler on the computer -

Failed installations are usually caused by pre-packaged office installations or cases where multiple versions of Office have been installed.

Please make use of the Microsoft Uninstall Support tool to remove any invalid installations.
Once removed, please login to Office365 directly to access and install the latest version of Microsoft Office.
Retail installations from original media or Microsoft downloads are also supported.

When reinstalling eFiler you can also generate a verbose log of the installation by following the instructions here.

If eFiler was previously installed and successfully operational -

If you have been running an earlier version of eFiler and have tried to upgrade or encounter problems when trying to run the current installer you may have a broken installation. You should always try to repair the installation first (go to control panel, programs and features). If a repair or uninstall fails consider using a third party tool to remove any leftover eFiler components from the system (we recommend Revo Uninstaller). Be sure to find and remove any registry keys. Once there are no further records remaining download the latest installer and complete a fresh installation.

You may also try to remove eFiler using the Microsoft Troubleshooter

Failed Installations

Network location warning - Unable to file emails

Symptom - A warning triangle appears next to locations shown in Location Manager.
Solution - Check to make sure that network locations are mapped and accessible before Outlook opens.

Troubleshooting Autopilot

Autopilot based filing suggestions are dependent on the eFiler Service results.

In settings (under Locations) check to ensure Autopilot has a minimum number of locations to show. We recommend a minimum of 3 results. If it is set to 0 no Autopilot results will be offered.

- Double click the eFiler Service system tray icon to open the eFiler Service Control window
- Review the locations and the number of folders indexed
- If the location you are expecting results from is not listed first add a location and connect to a storage volume from within Location Manager
- Pause and Restart indexing on the storage volume to trigger an update
- Go into Location manager, click on settings (cog icon). Under modules adjust the re-scan interval
- Check / adjust or remove any path filtering options which have been configured

Troubleshooting Rules

If there is a conflict or broken rule eFiler Rules may become unavailable. Rules may also be disabled if you exceed the rules quota established for your mailbox. It can help to check an rules on the server side if you are using Office365 and delete any rules in conflict that are not required.

To restore order use the /cleanrules or the /cleanserverrules switch for Outlook. In the search bar type the command to launch Outlook.exe followed by the switch required.

/cleanrules

Starts Outlook and deletes client-based and server-based rules.

Important If you have multiple or additional mailboxes in your Outlook profile, running the /cleanrules command line switch deletes the rules from all connected mailboxes. Therefore, it is recommended that you only run this command when your Outlook profile only contains the one, target mailbox.

/cleanserverrules

Starts Outlook and deletes server-based rules.

Learn more about available Outlook switches here.

Additional information (external links) -
The rules on this computer do not match the rules on Microsoft Exchange
Rules are disabled or you receive an error when you try to create or enable rules

Learn how to Export / import eFiler Rules

Troubleshooting Activation

Follow the steps to activate eFiler using your serial number. A password is not required for license activation. Passwords are only required for policy management.

If activation does not complete successfully repeat activation after following the steps below
- Ensure you are licensed for the version of eFiler that is currently installed. Customers on subscription or an active maintenance contract can always install the latest version.
- If you are transferring a license from one computer to another ensure you have followed the guidance here.
- Avoid proxy servers - make a direct connection to the internet
- Disconnect from any VPN's
- Suspend your Antivirus / Malware solution (only if the steps above have not helped you)

Unexpected Performance or missing functionality

If eFiler is not performing as expected or if features are unresponsive or missing please ensure you have added an anti-virus exclusion for the following paths -

C:\Program Files\Irradiant eFiler (x64 edition)
And / Or
C:\Program Files (x86)\Irradiant eFiler (x86 edition)

Transfer or Backup Configurations

There are 2 configuration files which hold the users locations (.efl) and configuration (.efc)

These are located in the roaming profile path of the user profile.

To transfer or backup these configurations please copy the files listed below -

C:\Users\%username%\AppData\Roaming\eFiler Outlook Addin\Config.efc
and
C:\Users\%username%\AppData\Roaming\eFiler Outlook Addin\Config.efl

Note	These configurations are sensitive and should not be edited manually.

Settings

Licencing and Activation

Activate a single computer

Each installation of eFiler requires a valid serial number for activation. Multiple computers can be activated with a single serial number based on the license purchased.

The serial number can be applied in one of 3 ways -

Apply the serial number manually -

1. From the eFiler menu select Settings
2. On the left menu Licence
3. Enter the Serial number as provided
4. Select 'Set serial' to complete activation

Activate multiple computers

Apply the serial number based on location -

We are able to authorize activations based on the source location of the installations. Please contact us if you would like your clients to complete activation automatically by this method.

Apply the serial number during installation using the SNUM switch -

From eFiler v3 and above it is possible to specify the serial number when installing eFiler to ensure that the machine is assigned to the correct license.
To do this run the following command from a command prompt –
msiexec /i "c:\temp\efiler.msi" SNUM=SSAAMMGGYYII
The above example assumes you have copied the installer to c:temp and you enter a valid serial number.

Apply the serial number by registry key -

The following registry key can be defined (either locally, by script or by GPO) -
HKEY_CURRENT_USER\SOFTWARE\Irradiant Ltd\eFiler\Configuration\EF_SERIAL
If eFiler is not activated and the following registry key is found, eFiler will attempt to complete activation automatically.
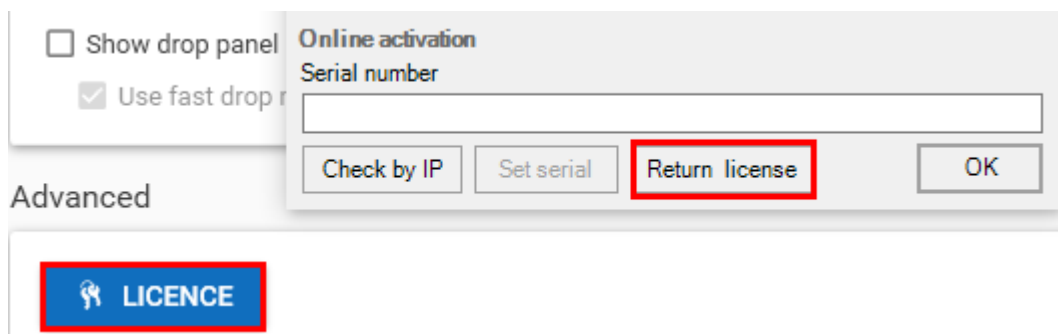
If activation is unsuccessful please follow the troubleshooting steps here.

Transfer a licence to a new computer

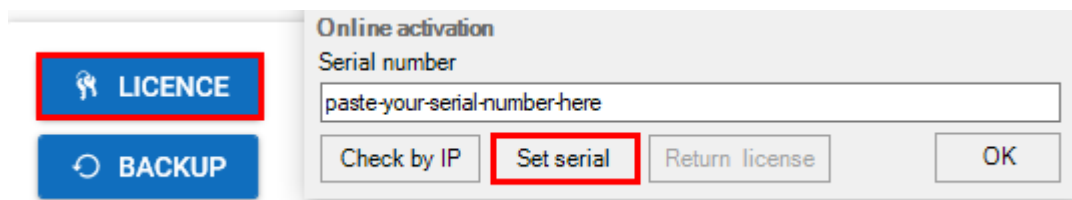To transfer a licence you will need access to both the old and the new computer.

On the old computer -

1. Go into General Settings
2. Click on Licence
3. Click on Return License in the popup window. A confirmation window will confirm you have successfully returned a licence.
4. From Control panel, Programs and Features, proceed to uninstall eFiler now.

On the new computer -

1. Go into General Settings
2. Click on Licence
3. Enter your serial number
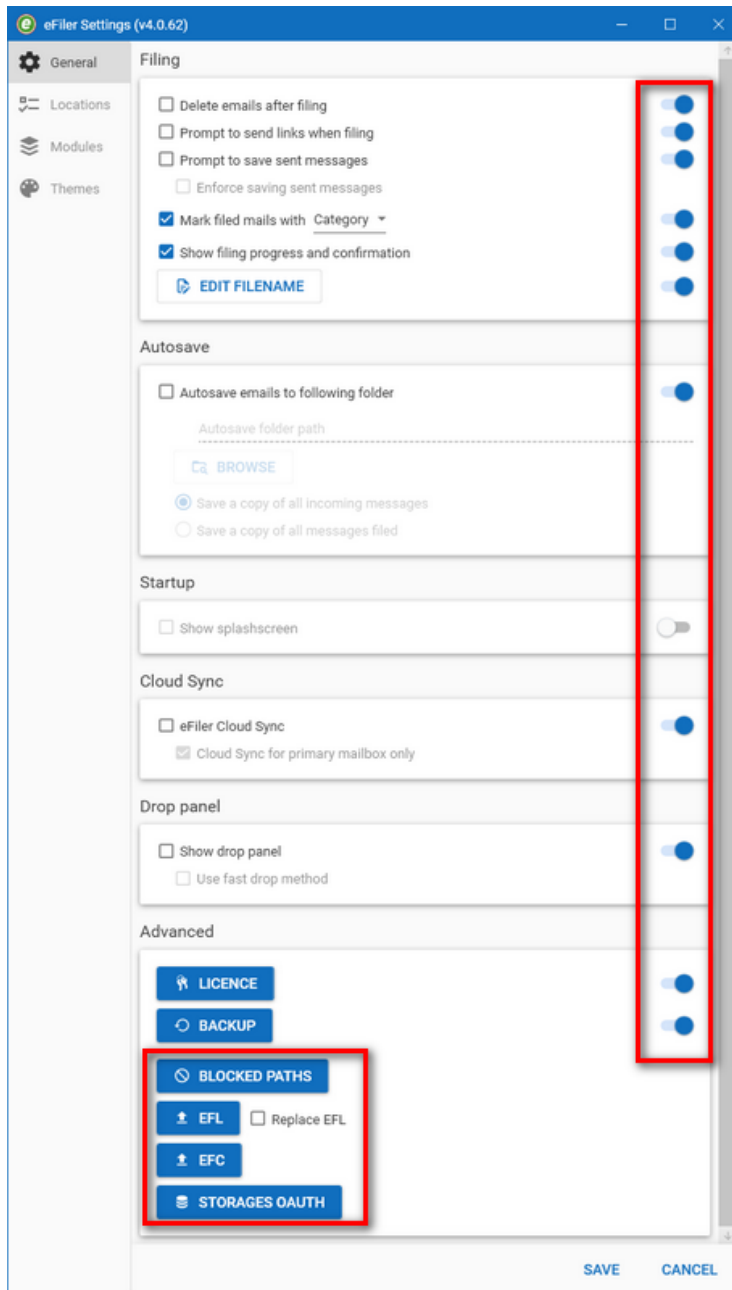4. Select 'Set Serial' to complete activation

Notes Uninstalling eFiler will not remove the licence assigned to that specific computer. This allows users to uninstall/reinstall without re-applying the licence. If you intend to transfer the licence to a new computer you should first return the licence on the old computer.

Activation will fail if you do not have sufficient licenses free for activation. If you hold an active subscription or valid maintenance contract and are no longer able to access the old computer please email us the old computer name for de-registration.

If you are a legacy perpetual license holder who has opted out of support and updates you will need to purchase a Licence transfer if you require our assistance to transfer licenses to new computers.

Customers with legacy licenses who have opted out of support and updates must install the version they are licensed for. We regret we cannot offer support on legacy licenses - if you require support please start a new subscription.

Central Configurations

System administrators can easily centralize configurations and deploy consistent settings to all users.

Configurations are uploaded and deployed from our Cloud server to users on the same license.

1. Configure eFiler settings as you would like to deploy them to your end user.

2. Open eFiler settings in Admin mode - to do this hold CTRL and ALT before selecting the cog icon in location manager.

3. You are prompted for your license password. The password is normally provided when you purchase eFiler. If you do not know the password please contact us and we can provide it.

4. When the settings are displayed you will have access to additional features to enable you to lock settings.

5. Adjust as required, restricting access to users to features that you wish to apply consistently.

6. Once the configuration is complete, select the option to upload EFC (eFiler Configuration)

7. Any computer with eFiler installed and registered to the same license will receive the policy settings.
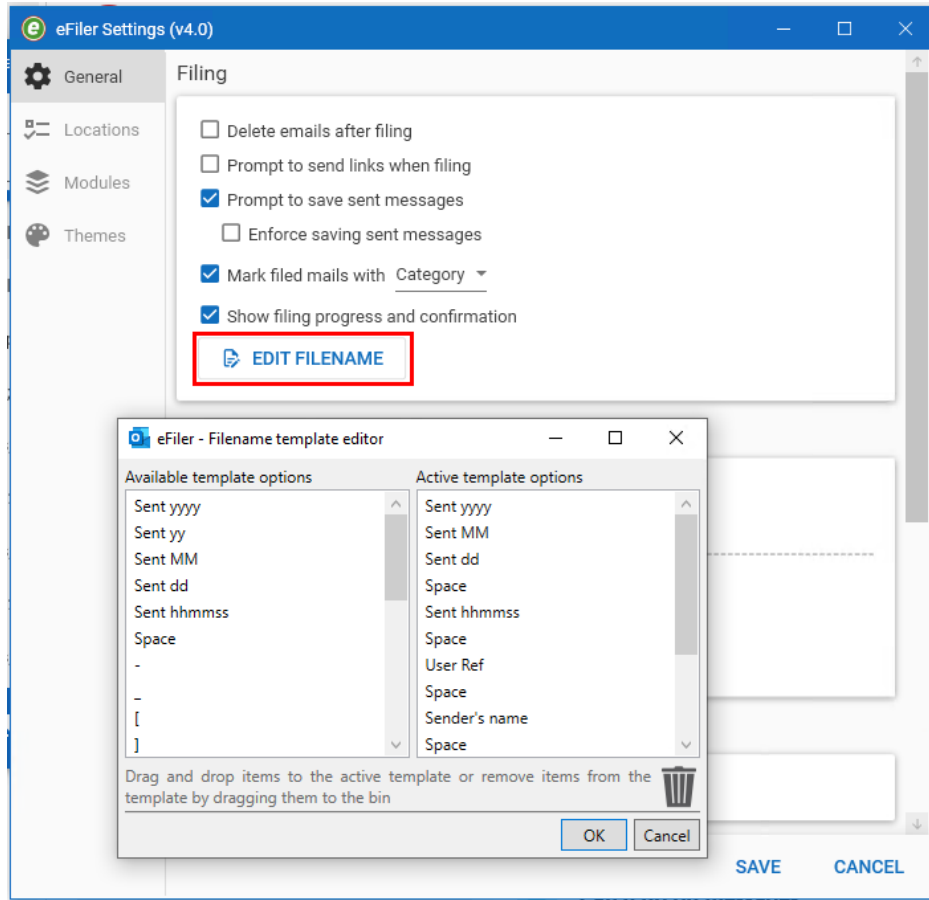
For additional options please refer to eFiler Policy Manager (a Windows application specifically for policy management)

Tip   When purchasing licenses ask for them to be split into groups based on department needs. Each department will share its settings and locations on the same serial number.

File Naming Template

Emails are saved as .msg files. The file name template can be adjusted in eFiler settings. To add or adjust entries please drag and drop the desired values. To remove an item from the template drag and drop the item over the recycle bin.

File name template options include -
Sent yyyy
Sent yy
Sent MM
Sent dd
Sent hhmmss
Space
- (dash)
_ (underscrore)
[and/or]
(and/or)
Subject
Sender's name
Sender's initials
Recipients
Recipient's initials
Third party name
S and or R (short for Sent or Received)
Sent or Received (long form)
User Ref
Custom (enter any custom symbol or text)

Tip	It is important to retain the date and time at the start of the file name. This is the date and time the email was sent and is a unique value for each email. This prevents duplication when multiple users attempt to file the same email.

Settings - General

Delete emails after filing
This setting allows eFiler to delete the email from your inbox or sent items once it is filed. You will find the deleted emails in your Deleted Items folder within Outlook. These can be cleared in bulk or by schedule (some users opt to clear deleted items each time the exit Outlook). If you prefer to delete the emails manually yourself leave this one unchecked.

Prompt to send links when filing
Enable this setting if you regularly want to send a link to filed emails to a colleague. Once the email is filed you will be prompted and an email containing a summary of emails filed with links to their locations will be generated ready to send.

Prompt to save sent messages & Enforce saving sent messages
Enable this to be prompted to save emails immediately after clicking on 'send'. See more details here.
Enforce saving sent messages will prevent a user from sending an email without filing it.

Mark Filed emails with Category
When enabled filed emails are marked with a green eFiler Category.

Show filing progress and confirmation
Enable this option to get visual confirmation as emails are filed. The popup will appear at the top right hand corner of the screen.

Prompt to save unsaved emails
A prompt to save window is triggered when a user opens and reads any unsaved email.

Prompt user to save attachments separately (eFiler+ Feature)
When an email with attachments is selected for filing the user will be prompted where to save the attachments to. Selected locations are saved for future ease of reference.

Message Filename - Edit File Name Template
Control the file name template of the saved emails. Please read more here.

Attachments Filename
Modify the file name template for saving attachments. Use this to add the date and time the attachment was sent or the senders domain name (and more)

File Format
Select from .msg or .eml file format for saving emails

Hotkeys (eFiler+ Feature)
Define hotkeys to specify keyboard shortcuts to open Location Manager, Search or to Save attachments in bulk without using the Outlook ribbon menu.

Autosave
Save a copy of all incoming messages (or emails filed by eFiler) to a specific folder.

Startup splash screen
Disable the splash screen shown at startup

Cloud Sync
Enable eFiler cloud sync for filing emails from mobile / Outlook web access or by drag and drop. Read more here

Drop Panel
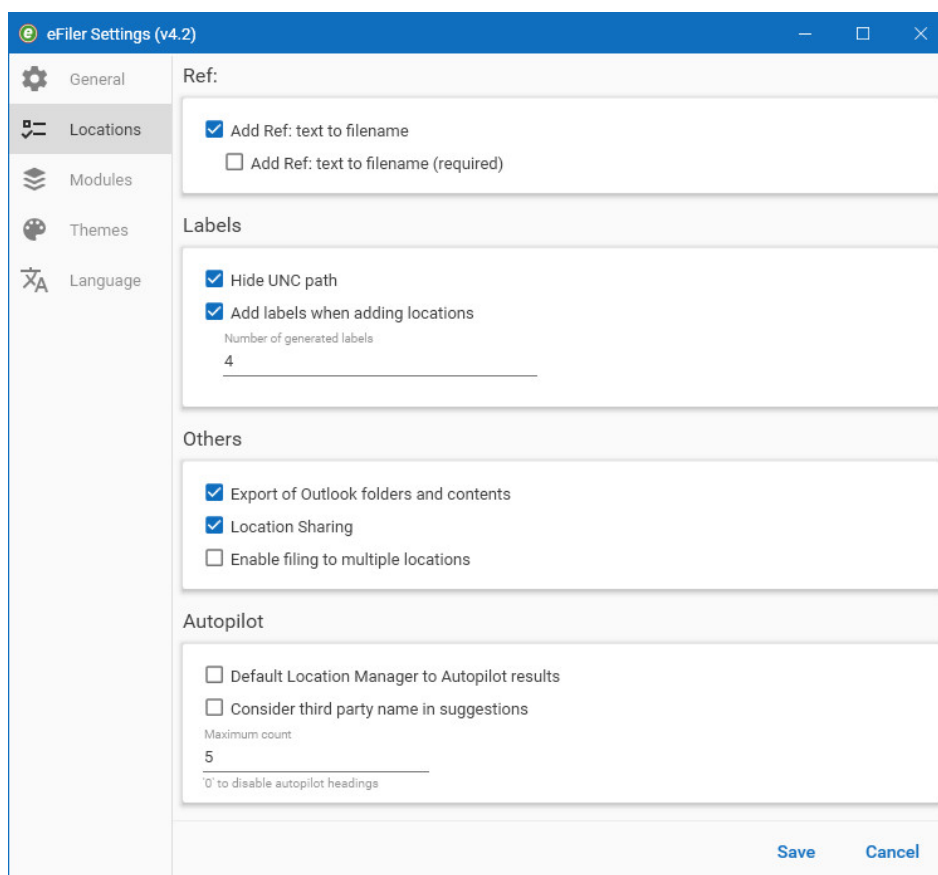Use the drop panel for drag and drop filing anywhere on the screen. Read more here.

Licence
Manage your license status (including the option to return a license), apply a serial number manually or request manual activation. Read more here.

Backup
Send a backup of your configuration to our servers. To retrieve the backup please email support@efiler.co.uk mentioning the computer name.

Settings - Locations

Add a reference to filenames
When enabled you will see the option to add a reference when filing an email. You can make it mandatory to add a filing reference by selecting the (required) option. Read more here.

Hide UNC Path
Enabling this option will simplify the display in Location manager displaying labels instead of full UNC paths where available.

Add labels when adding locations
When you add a location to your list it will automatically convert the folder names to labels. Specify the number of labels to be generated automatically.

Export Outlook folders and contents
Enable this to allow users to export Outlook folder, sub folders and all emails in one operation.

Location sharing
Enable this to allow users to share locations with colleagues. If one user selects a location to share and clicks on the option to share the location the other users on the same license will receive the shared location next time they restart Outlook.

AutoPilot Settings
Select the checkbox if you wish for Location manager to default to showing all possible Autopilot suggestions.
Adjust the number of Autopilot suggestions provided. Set the value to 0 to disable Autopilot suggestions.

Settings - Modules

Search sub folders
If enabled eFiler will provide search results for sub folders of the selected location.

Enable search as an application
When enabled search opens as a separate window and is not bound to Outlook.

Enable Rules Module
Enable this to see the eRules module on the Outlook ribbon menu.

eFiler Service (for Autopilot results)
The eFiler service is a system tray application to monitor folder locations. This can be used standalone or as a centralised service. The service must be enabled to provide results to Autopilot.

Computer name - specify a different hostname for index control (available to eFiler+ licences). Please contact support for further information and suitability.
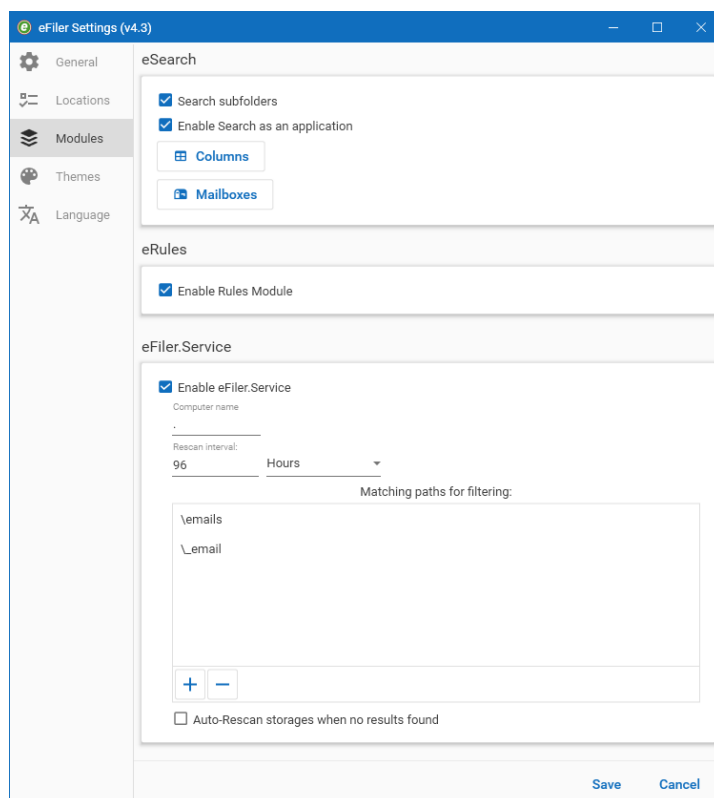
Rescan Interval -
Adjust the re-scan frequency. Autopilot relies on these updates in addition to system updates when new locations are added. For faster recognition of newly added locations reduce the re-scan interval.
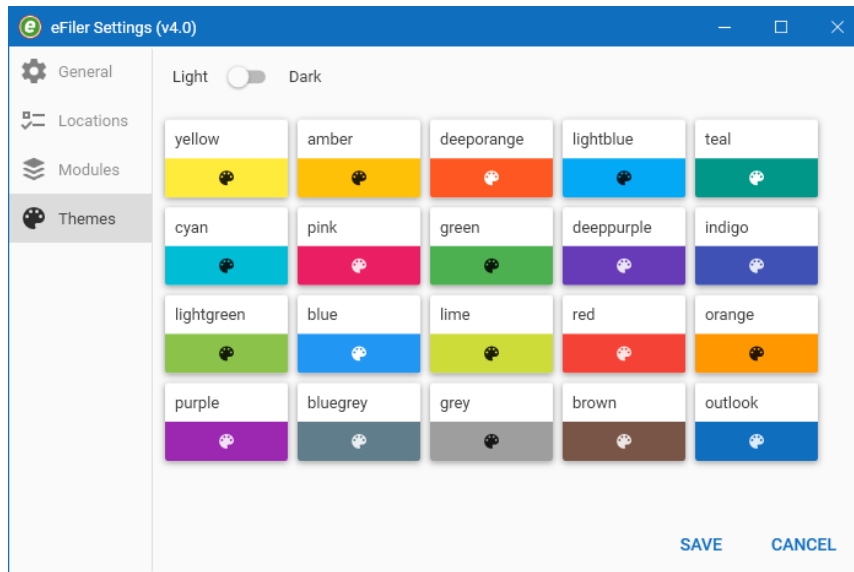
Filters -
To provide accurate Autopilot suggestions you can limit matches to contain particular strings based on your filing system. If you file to a projects or clients and have a common sub folder called 'Emails' you can add \emails or emails\ as a filter to ensure suggested locations always offer folders begin or end in "emails". Multiple filters can be set as shown in the image below but we recommend limiting it based on the standard folder structure your business uses. Add and remove filters using the + / - icons to refine Autopilot results. Multiple phrases / filters can be specified which may include folder deliminator to ensure the exact folders are filtered (eg. use \email to match all folders starting with email OR email\ for all folders ending in email).

See also [Troubleshooting Autopilot](#) and [Adding locations when using autopilot](#)
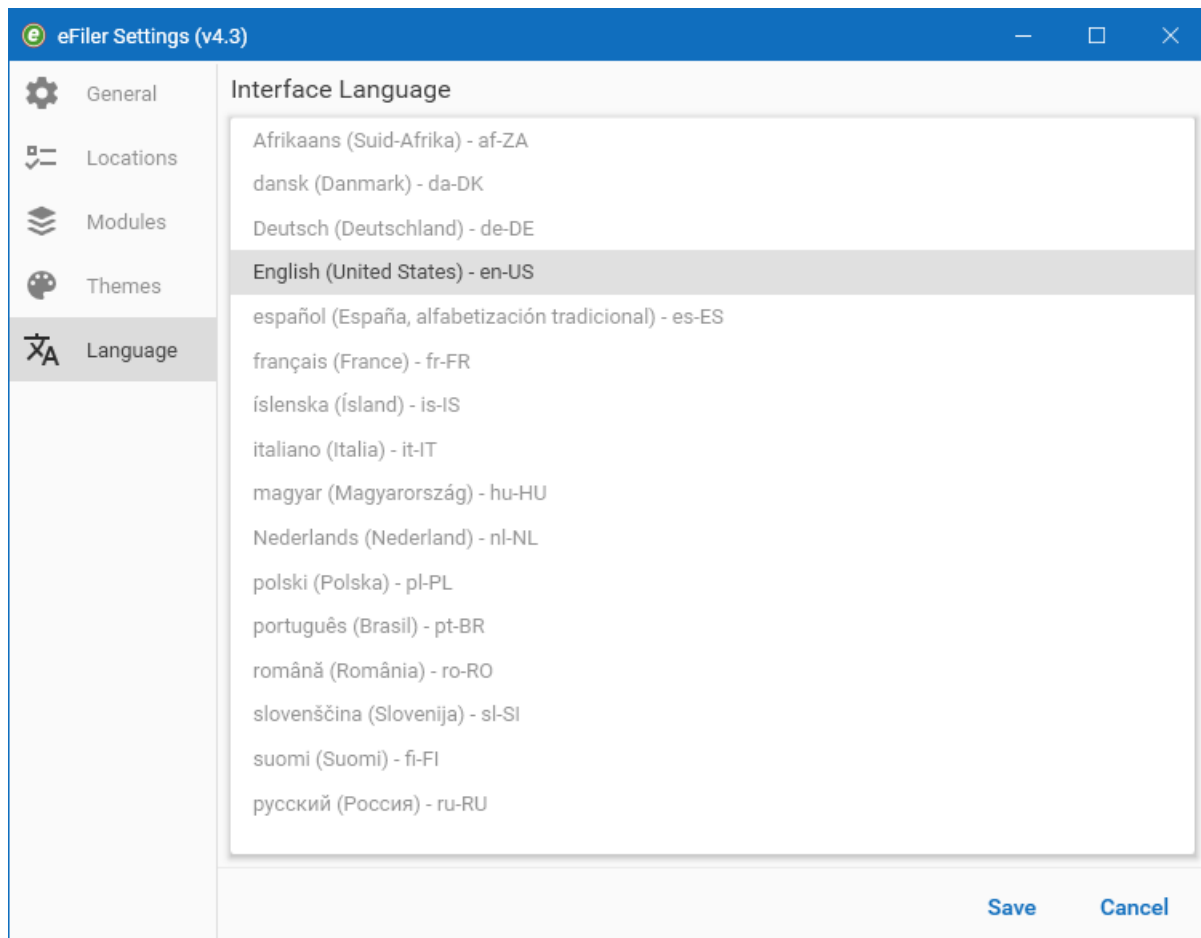
Settings - Themes

Select from light or dark mode and set a colour scheme for eFiler.

Settings - Language

Select an appropriate language choice. Please share any improvements / corrections to support@efiler.co.uk

Expected Behavior & Known Issues

Expected Behavior

Locations displayed in location manager are not dynamic and do not reflect real time changes made on the storage volume.
If a user selects a project folder for filing an email into within Location Manager and simultaneously renames the selected folder within the BIM360 web interface the eFiler UI does not reflect the update in real time. Where possible, the email will file as expected but the filing confirmation window will show the original folder name as it was selected. In cases where the email cannot file you will be told the location is no longer available.

Long paths
Different file systems restrict the number of characters in a path and filename. In some cases the length of the email subject or the number and name of sub folders can affect eFilers ability to save an email. If eFiler is not able to file an email it will not be marked as filed.

Known Issues

v4.0.95	No known issues as of 30-06-2021
v3.3.48	Files saved by eFiler can have the incorrect file permissions set.
	Problems with eRules on Office 365 accounts.
v3.3.41	Configuration file grows each time invalid filing locations are detected.
	This results in performance issues.
v3.3.28	Due to changes in Office365 emails are not reliably marked as filed