Advanced user guide for eFiler V3

What this Advanced User Guide will tell you

The eFiler licence server does two jobs, managing licences to allow eFiler to run on machines owned by legitimate eFiler customers and serving "policies" which are sets of filing locations, configuration settings and eRules to client computers to ensure that all users have a consistent eFiler set-up which complies with the customer's needs. This Advanced User Guide explains how to activate and deactivate seats on a licence and to configure and deploy eFiler licence policies. A licence is identified by its serial number and an informal description which makes it easy to identify. Licence serial numbers are sent to customers on receipt of payment and are used with the customer's admin password to access the Admin Settings and Policy Manager utilities to create and manage policies. A customer may have any number of licences each with its own policy and seat allocation up to a total of the number of seats bought by the customer. A single password applies to all of a customer's licences.

Computers are licensed by serial number (where the licence is registered to the machine) or by IP (where the licence is registered to a location) or both. A licence may have as many IP addresses assigned to it as needed. When a computer not licensed by serial number contacts the licence server via an assigned IP address it is granted an eFiler licence. If a computer is licensed only by IP and eFiler contacts the licence server via an unassigned IP then eFiler will go into 14 day trial mode and will be disabled when the trial mode expires. This is to prevent computers from running eFiler if they have been sold or stolen with eFiler still installed. For laptops which will be contacting the licence server via unassigned IP addresses it is best to license by serial number.

Installing eFiler – always install eFiler with Outlook closed

- ### Run the msi

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.

- ### Run msiexec.exe using a script

The eFiler.msi may also be run from the command prompt, the Run box or via a login script using the following syntax:

msiexec /i "Drive:\Path\eFiler.msi" SNUM=*licence serial number*

This will simultaneously install and license eFiler. This is the easiest way to license a lot of computers and is useful for customers who have multiple licences each with their own policy or for laptops which will be used via various IP addresses.

To install eFiler without licensing it do not include the SNUM= *licence serial number* switch.

- ### Installation by Group Policy

As a standard msi package, eFiler.msi may also be installed by Group Policy.

Managing licences

- Settings->Change licence ID

The **eFiler settings->Change licence ID** dialog is used for licence management.

- Activation of multiple machines by licence serial using msiexec.exe with SNUM=

As previously described, computers may be licensed during installation by running msiexec.exe from the command prompt, Run box or login script using the following syntax:

msiexec /i "Drive:\Path\eFiler.msi" SNUM=*licence serial number*

- Activation by licence serial for individual machines

To license eFiler paste the serial number into the "serial number" box and click "set serial". A confirmation message will pop up when the machine is successfully licensed. This is useful for licensing laptops which will be used via various IP addresses as it registers the machine to the licence rather than the location (office gateway IP address).

- Activation by checking for an assigned IP

To license a computer by an assigned IP click "Check by IP". If a spare licence is available the machine will be licensed. If you need to add an IP to your licence click "Send details" and email support@efiler.co.uk to ask for the IP to be assigned.

- Manual activation code for running behind a firewall

The eFiler licence server needs to be able to communicate with client computers from www.irradiant.co via Port 80. If a customer's security policy precludes this communication eFiler may still be licensed by manual licence activation. To generate a manual activation code click "Send activation code request". The licence code will be generated and sent to you. This method is done machine by machine and prevents a customer from being able to use licence policies and shared locations, meaning that configuration files will have to be copied from the machine on which they are created to all others in that organisation. The folder to copy is:

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

- Returning a licence activation for re-use by another computer

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".

Configuration overview

- **<u>*.efl, *.efc, *.efr files, shared locations, policy locations, admin password</u>**

Configuration files are stored in the 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".

- <u>Settings menu, editing policy locations</u>

As described in the user guide, settings are configured in the eFiler settings dialog. Any settings which are greyed out may only be edited using the Admin Settings dialog as described below. To edit Policy Locations click the padlock icon at the bottom right corner of the Location Manager dialog and enter your admin password. To upload them enter the Admin Settings dialog (hold Ctrl+Alt and click the Settings button and enter your Admin password when prompted) and click "Upload Active EFL".

- <u>Admin Settings menu (Ctrl+Alt+Settings button and enter Admin password)</u>

The Admin Settings menu gives a quick and easy way to configure settings to comply with a customer's needs and to upload the settings and a list of filing locations into the licence to form a policy. Set the settings as desired and select the "lock" box next to settings you want greyed out for users. To upload the settings into the licence click "Upload Active EFC". To exit with changes saved click "Save settings", otherwise click "Cancel".

- <u>Autosave</u>

In the Admin Settings dialog you will see the Autosave feature. This saves a copy of every email saved or every email received, as required, into a nominated folder which could be a cloud storage or LAN folder. Autosave is useful for distributed workforces and as a simple offsite backup for disaster recovery.

- <u>Policy Manager</u>

The Policy Manager utility in the Start->Programs or All Apps menu allows for the uploading, downloading, deleting or replacing of licence policy files. Full details are at http://efiler.co.uk/support/policy-manager .

- <u>Location Scanner</u>

The Location Scanner utility in the Start->Programs or All Apps menu allows for lists of folders with specific text in the folder names or in the file names of the files they contain to be compiled and then saved or merged with a local EFL to form a set of filing locations to be used on the local machine or deployed as part of a licence policy. Full details are at http://efiler.co.uk/support/location-scanner/ .