

Quick Start: Filr Hands-on for Windows

August 2013

Novell®

Overview

This Quick Start contains abbreviated instructions for performing a brief evaluation of Novell Filr in a Microsoft Windows Active Directory environment. It features macro-task, high-level instructions, and is actually an abbreviated version of the [Filr 1.0.1 Hands-on Guide for Windows](#). If you get stuck as you go, or if you are unsure about something, click one of the numerous links to the [Hands-on Guide](#). There you will find screen shots and other details to help you get “un-stuck.”

Here’s an outline of the topics covered.

- ◆ “Choosing a Deployment Type” on page 1
- ◆ “System Requirements” on page 1
- ◆ “Downloading Filr Software” on page 2
- ◆ “Creating Test Users” on page 2
- ◆ “Preparing Folders and Files” on page 2
- ◆ “Deploying and Configuring the Filr Appliances” on page 3
- ◆ “Securing LDAP Communications between Filr and Active Directory” on page 4
- ◆ “Administering Filr” on page 4
- ◆ “Using Filr” on page 6

Choosing a Deployment Type

Filr can be deployed as a small deployment (a [single, “all-in-one” appliance](#)) for test purposes, or as a large deployment ([separate appliances](#)) for more robust, production deployments.

IMPORTANT: Small deployments are not covered in this Quick Start. For small deployment hands-on instructions, see the sections marked “[Small Deployment:](#)” in the [Filr 1.0.1 Hands-on Guide for Windows](#).

System Requirements

The following is an overview of the system requirements for a Filr deployment with separate appliances. For detailed information, see “[System Requirements](#)” in the [Filr 1.0.1 Hands-on Guide for Windows](#).

- A [Windows 2003 R2 or 2008 R2 Active Directory server](#) on which you have administrative rights

- Software for the [three Filr appliances](#)
- One of the [supported virtualization platforms](#) with 18 GB RAM and 250 GB hard drive space for Filr appliance use
IMPORTANT: This Quick Start assumes a VMware environment. If you are using Xen or Microsoft Hyper-V, you might need to adjust some of the setup steps.
- [Three IP addresses](#) on the AD network
- At least [one internal and one external email address](#) for receiving Filr invitations and notifications
- An enterprise-level (non-home) Windows XP, 7, or 8 workstation that is joined to the AD domain and meets the [other requirements](#) listed in the [Filr 1.0.1 Hands-on Guide for Windows](#).
- [Wireless connectivity](#) on your network
- At least one [mobile device](#) (iOS 5 or later or Android 2.3 or later) that is capable of connecting to your network’s wireless connection

Downloading Filr Software

Filr is distributed as a set of ready-to-deploy virtual machine files that are packaged together in [three .zip or .tar files](#), depending on your [virtualization platform](#).

The [hands-on exercises](#) require that you also download a zip file containing exercise folders and files.

- 1 Access the [Novell Download site](#) and download the following:
 - ♦ The files for the [three Filr appliances](#): Filr, Filrsearch, and MySQL
 - ♦ The `Hands-on_Filr-windows.zip` file that contains the [exercise folders and files](#)

For more information, including screen shots, see “[Large Deployment: Software](#)” in the [Filr 1.0.1 Hands-on Guide for Windows](#).

Creating Test Users

In order for AD users to access Filr, their user accounts must be synchronized with the Filr appliance through LDAP.

The user tasks in this quick start involve eight test users plus a proxy user named Filr Proxyuser shown in [Table 1](#).

Table 1 Test Users to Create

First Name	Last Name	User Logon Name	Home Folder
A	Red	ared	Yes
A	Pink	apink	No
A	Blue	ablue	Yes
A	Green	agreen	No
A	Yellow	ayellow	Yes
A	Orange	aorange	No
A	Black	ablack	Yes
A	Gray	agray	No
Filr	Proxyuser	filrproxyuser	No

- 1 In your Active Directory Domain, [create an organizational unit container named testusers](#).
- 2 In the testusers container, [create the users](#) listed in [Table 1](#).
- 3 [Assign the users that have color names the password Filrrock\\$](#), or another password that complies with your AD password policy.
- 4 Assign Filr Proxyuser the password `N0v3llfi!r` (or a policy-compliant password if required).

Preparing Folders and Files

The hands-on exercises require that you [set up specific folders and files](#).

UNZIPPING THE EXERCISE FOLDERS AND FILES

- 1 On your Windows server, [extract the Filr-Exercise-Folders-w.zip](#) file at the root of Drive C.

SETTING UP THE HOME_FOLDERS SHARE

Configuring Home_Folders Share Permissions

- 1 Access the `Filr-Exercise-Folders` folder, then [share Home_Folders as a hidden share named Home_Folders\\$](#).
- 2 [Remove access to the share by the Everyone group](#), then [add the Domain Users group and assign it full control](#).

Configuring Home_Folders NTFS Permissions

- 1 [Remove NTFS permissions for the Users groups](#), then [add full control for filrproxyuser](#).

ASSIGNING HOME FOLDERS

- 1 Access the properties for each user in [Table 1](#) that needs a home folder (last column) and [set up a home folder connection in their profile tabs](#).
- 2 [Ensure that the home folders were created as expected](#).

SETTING UP THE OTHER HANDS-ON EXERCISE FOLDERS AND FILES

Creating Shares and Changing Share Permissions

Table 2 Share Permission Assignments

Folder Name	Users to Assign Full Share Permissions
Dev	ared; filrproxyuser
IS	ablue; filrproxyuser
Mrktg	ayellow; filrproxyuser
Sales	ablack; filrproxyuser

- 1 Starting with folder `Dev`, share the folder, remove access for group `Everyone`, then add access and assign full control for the users listed in the right

column of [Table 2](#).

Changing the NTFS Permissions

Table 3 NTFS Permission Assignments

Folder Name	Users to Assign Full NTFS Permissions
Filr-Exercise-Folders	filproxyuser
Dev	ared
IS	ablue
Mrktg	ayellow
Sales	ablack

- 1 Remove NTFS permissions for the *Users* groups to Filr-Exercise-Folders.
- 2 Add full control for *filproxy* user to Filr-Exercise-Folders (as shown in [Table 3](#)).
- 3 Add full control to the other folders (starting with *Dev*), for the users listed in the right column.

Deploying and Configuring the Filr Appliances

You deploy Filr, then Filrsearch, and finally MySQL. Then you configure them in reverse order, ending with Filr.

For details, including screen shots, see “[Large Deployment: Deploying and Configuring](#)” in the *Filr 1.0.1 Hands-on Guide for Windows*.

NOTE: As in other sections, this section describes a deployment on VMware. For help deploying on other virtualization platforms, see “[Filr Server Requirements](#)” in the *Novell Filr 1.0.1 Installation and Configuration Guide*.

DEPLOYING FILR

- 1 In a location that is accessible from the vSphere client, unzip the three files that you downloaded in “[Downloading Filr Software](#)” on page 2.
- 2 Using the vSphere client, attach to the VMware ESX server, click *File > Deploy OVF Template*, then select the Filr .ovf file and [proceed through the dialogs](#) until the appliance is deployed.
- 3 Edit the virtual machine settings and add a **100 GB second disk** to the appliance.
- 4 Power on the virtual machine. When prompted [accept the license](#), then fill in the [required password and IP/network information](#) and [accept the defaults](#) until you see a terminal screen with a message that the system is ready for appliance configuration.

DEPLOYING SEARCH

- 1 Deploy the Filrsearch appliance in the same way, adding a **25 GB second disk**, and entering the [IP addresses and settings](#) you identified for the search appliance.

DEPLOYING MYSQL

- 1 Deploy the MySQL appliance in the same way, adding a **100 GB second disk**, and entering the [IP addresses and settings](#) you identified for the MySQL appliance.

CONFIGURING THE MYSQL APPLIANCE

- 1 [Configure the MySQL appliance](#) by launching a [management browser](#) and entering the following URL:
`https://MySQL-appliance-ip-address:9443`
- 2 Click the [phpMyAdmin](#) icon, type *Username* `root` and *Password* `root`, then click *Go*.
- 3 [Add a database user](#) named `filr` for the Filr appliance and [create a database with the same name and all privileges](#).
- 4 Secure the MYSQL appliance by [changing the root user password](#).

CONFIGURING THE SEARCH APPLIANCE

- 1 [Configure the Filrsearch appliance](#) by entering the following URL in the management browser:
`https://Filrsearch-appliance-ip-address:9443`
- 2 [Log in as the vaadmin user](#), using the password you specified in [Step 1 on page 3](#).
- 3 Click the *Filr Search Appliance Configuration* icon, click *Next*, type and confirm a *Password* for the search service, then click *Finish > Submit*.

CONFIGURING THE FILR APPLIANCE

- 1 [Configure the Filr appliance](#) by entering the following URL in the management browser:
`https://Filr-appliance-ip-address:9443`
- 2 Log in as the vaadmin user, using the password you specified in [Step 4 on page 3](#).
- 3 Click the *Novell Filr Appliance Configuration* icon, select [Large Deployment](#), then click *Next*,
- 4 In the [Database dialog](#), specify the full DNS name for the MySQL appliance and the *Password* that you specified in [Step 1 on page 3](#), then click *Next*.
- 5 In the [Search Appliance dialog](#), specify the full DNS name of the Filrsearch appliance and the *Password* that you specified in [Step 1 on page 3](#), then click *Next*.
- 6 Select a *Locale*, then click *Finish*.

Securing LDAP Communications between Filr and Active Directory

To secure communications between Filr and Active Directory, you need to create a self-signed certificate in Active Directory and export it in DER encoded binary X.509 format.

For details, including screen shots, see “[Securing LDAP Communications between Filr and Active Directory](#)” in the *Filr 1.0.1 Hands-on Guide for Windows*.

- 1 (Conditional) If you haven’t installed the Internet Information Services (IIS) Manager snap-in in the Microsoft Management Console (MMC) on your Windows server, do so now.
- 2 On the Windows server, [launch MMC](#), then type Ctrl+M.
- 3 [Open the IIS Manager Snap-in](#) and select the [Windows server](#) that you plan to connect with Filr for LDAP synchronization.
- 4 Create a [self-signed certificate](#) for the server.
- 5 [Export the certificate](#) in [DER encoded binary X.509 format](#).
- 6 In your management browser, access the [Filr appliance’s system configuration tools](#), then [click the Digital certificate icon](#).
- 7 Click [File > Import > Trusted Certificate](#), browse to the certificate file, then click [Open > OK > Close](#).
- 8 [Reboot](#) the appliance.

Administering Filr

For details, including screen shots, see “[Administering Filr](#)” in the *Filr 1.0.1 Hands-on Guide for Windows*.

SYNCHRONIZING LDAP USERS

The [Active Directory users](#) that you created must be synchronized to Filr through an [LDAP synchronization process](#).

- 1 In the administrative browser, access the following URL:

```
https://Filr-appliance-IP-address:8443
```
- 2 Sign in as *User*: admin with *Password*: admin, then [change the password](#) as prompted.
- 3 Click [admin](#) (upper right), select [Administration Console](#), then under *System*, click [LDAP](#).
- 4 Click [Add a New LDAP Source](#) OK > OK.
- 5 Enter the [LDAP Source information](#).
- 6 Skip to the *Base DN* field, then type the [DN](#) of your testusers container.

- 7 Set the [synchronization options](#): *Run immediately*, *Synchronize user profiles*, and *Register LDAP user profiles automatically*.
- 8 Click [Apply](#).
All of the *users in the testusers container are added*.
- 9 Click [Close](#).
- 10 [Remove filrproxy](#) from the list.

SETTING UP MY FILES FOLDERS

For details, see “[My Files \(Personal Storage\)](#)” in the *Filr 1.0.1 Hands-on Guide for Windows*.

- 1 Under *Management > User Accounts*, select [A Black](#), [A Green](#), [A Orange](#), and [A Pink](#).
- 2 Click [More > Enable Personal Storage](#).

SETTING UP NET FOLDERS

Net Folders provide access to the files and folders that you [prepared earlier](#).

Specifying Net Folder Servers

Net Folder Servers are connections to Windows Shares on your file servers.

Configuring the Home_Folders Net Folder Server

- 1 Under *Management*, [click Net Folder Servers](#).
- 2 A [caution icon](#) indicates that a Net Folder has a problem, specifically in this case, that no proxy user is assigned.
Click the *Home_Folders\$* share name next to the icon.
- 3 [Type the DN and password](#) of the filrproxyuser. Then click [Test Connection > OK > OK > OK](#).
The warning icon should disappear.

Configuring the Other Net Folder Servers

A Net Folder Server provides access to a Windows Share through Filr.

- 1 Under *Manage Net Folder Servers*, click [Add](#), then [supply the information for the four exercise shares](#), starting with Dev.

Share	Text
Dev	<i>Name</i> : Development
	<i>Server path</i> : \\windows-server-IP-address\Dev
	<i>Proxy name</i> : filrproxyuser DN
	For example: cn=filrproxyuser,ou=testusers,dc=filr-lab,dc=local
	<i>Proxy password</i> : For example: N0v3llfi!r

Share	Text
IS	<p><i>Name:</i> IS</p> <p><i>Server path:</i> \\windows-server-IP-address\IS</p> <p><i>Proxy name:</i> filrproxyuser DN</p> <p>For example: cn=filrproxyuser,ou=testusers,dc=filr-lab,dc=local</p> <p><i>Proxy password:</i> For example: N0v3llfi!r</p>
Mrktg	<p><i>Name:</i> Marketing</p> <p><i>Server Path:</i> \\windows-server-IP-address\Mrktg</p> <p><i>Proxy name:</i> filrproxyuser DN</p> <p>For example: cn=filrproxyuser,ou=testusers,dc=filr-lab,dc=local</p> <p><i>Proxy password:</i> For example: N0v3llfi!r</p>
Sales	<p><i>Name:</i> Sales</p> <p><i>Server path:</i> \\windows-server-IP-address\Sales</p> <p><i>Proxy name:</i> filrproxyuser DN</p> <p>For example: cn=filrproxyuser,ou=testusers,dc=filr-lab,dc=local</p> <p><i>Proxy password:</i> For example: N0v3llfi!r</p>

- 2 Click *Test Connection* to verify that the information is typed correctly.
- 3 Click *OK*, set the synchronization schedule, then click *OK*.
- 4 Repeat from [Step 1](#) for each of the exercise shares.
- 5 Click *Sync* to populate the database with metadata for the Net Folder Servers.

Creating Net Folders and Setting Net Folder Access and Sharing Rights

Net Folders are connections to specific directories on Net Folder Servers that are similar to traditional mapped drives.

- 1 In the *Administration Console*, under *Management*, click *Net Folders*.
- 2 Click *Add*, then [enter the information for a Net Folder \(starting with reviews\)](#). Be sure to [test each Net Folder connection](#) for accuracy.

Net Folder Name	Server	Relative Path
reviews	Development	personnel\reviews
comp planning	Development	personnel\salaries
projects	Development	projects
training	IS	training\quick_starts
cool stuff	Mrktg	advertising\brochures
projections	Sales	revenue\projections
2013 tracking	Sales	revenue\quotas

- 3 [Enable the Net Folder for indexing and just-in-time synchronization](#). Indexing causes significant processing overhead, but the exercises files and folders are small.
- 4 In the *Rights* tab, assign the following sharing rights for the user indicated.

Name	User	Sharing Rights
reviews	ared	Allow Access Internal
comp planning	ared	Allow Access
projects	ared	Allow Access Internal External
training	ablue	Allow Access Internal Re-share
cool stuff	ayellow	Allow Access Internal External Public Re-share
projections	ablack	Allow Access Internal
2013 tracking	ablack	Allow Access Internal

- 5 Click *OK*, then repeat from [Step 2](#) until all seven Net Folders are created.

ENABLING SHARING

Allowing users to share files and folders requires that you enable sharing for the Filr site.

- 1 Under *System*, click *Share Settings*.
- 2 In the *User or Group* field, start to type `all`, then select *All Internal Users*.

- 3 Click [Re-share Items and Share with the Public](#), then click **OK**.
- 4 Click **OK**.

SETTING GUEST ACCESS

- 1 Under *System*, click [User Access](#).
- 2 Select [Allow Guest access and Guest access is read-only](#), then click **OK**.

ALLOWING THE DESKTOP APPLICATION TO BE DEPLOYED

- 1 Under *System*, click [Desktop Application](#).
- 2 Select [Be deployed](#).
In the *Auto-update URL* field, type the following:
`https://Filtr-appliance-IP-Address:8443/desktopapp/`
- 3 Click **OK**.

(OPTIONAL) SETTING UP EMAIL COMMUNICATION WITH THE FILR VM

The basic email service functionality that Filr provides is outlined in “[Filtr Email Notifications](#)” in the [How Filr Works—Overview Guide](#).

If you want to do the exercises that involve email, see the setup procedures in “[\(Optional\) Setting Up Email Communication with the Filr VM](#)” in the [Filtr 1.0.1 Hands-on Guide for Windows](#).

Using Filr

ACCESSING FILR TO DO THE END USER EXERCISES

Connecting to Filr through a Browser and Installing the Filr Desktop Application

- 1 On the management workstation, [start a browser and access the following URL](#):
`https://Filtr-appliance-IP-Address:8443`
- 2 [Log in as User ID: apink](#).
- 3 [In the upper-right corner, click apink, then download and install the appropriate Filr app](#).

The app should launch automatically.

Starting the Filr Desktop Application

- 1 On the Novell Filr welcome screen, click [Start](#).
- 2 In the *Server URL* field, [type https://Filtr-appliance-IP-address:8443](#), then log in and follow the prompts until the application is configured.
- 3 A Filr folder is now available on the workstation.

Installing and Starting a Filr Mobile App

Filtr mobile apps are available as free downloads in the Apple App Store, the Google Play App Store, and the Amazon Appstore for Android.

Download and install the Filr mobile app on the mobile device as you would any other device app.

To access the Filr Mobile App:

- 1 Start the app in the same way that you start other apps on your mobile device.
- 2 Log in as *Username: ablack*.

UNDERSTANDING TEST USERS AND THEIR ROLES

The [rights that the test users have to files and folders through Filr](#) are directly dependent on the [rights that you assigned them on the file system](#). You cannot modify file system rights through Filr.

To understand how file system rights and the existence of home directories affect the Filr experience for users, see the following in the [How Filr Works—Overview Guide](#):

- ◆ “[Rights to Files and Folders](#)”
- ◆ “[User Roles in Filr](#)”
- ◆ “[Sharing through Filr](#)”

EXPLORING FILR FUNCTIONALITY FOR END USERS

After you have completed the setup and administrations instructions in this QuickStart, your system is ready to [perform the end user tasks](#). Because the tasks do not lend themselves well to a Quick Start approach, they are only presented in the [Filtr 1.0.1 Hands-on Guide for Windows](#).

Legal Notices: Copyright © 2013 Novell, Inc. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, or transmitted without the express written consent of the publisher. For Novell trademarks, see the [Novell Trademark and Service Mark list \(http://www.novell.com/company/legal/trademarks/tmlist.html\)](#). All third-party trademarks are the property of their respective owners.

