

Using Micro Focus Filr with Microsoft Outlook Quick Start

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Quick Start

Filr now provides a plugin for integrating Filr with Microsoft Outlook. After installing this plugin, you can use the Outlook application to browse local or Filr-based files and attach the files in an email. Depending on the policy settings, the files are either directly attached to the email or the files are first uploaded to the Filr server and the link of the uploaded files is then shared in the email.

This functionality is only available when an Advanced-Edition license is installed on the Filr appliance and your Filr Administrator has enabled this functionality on the appliance. You can use this plugin only with Microsoft Outlook 2013 and Microsoft Outlook 2016.

Downloading and Installing the Filr Outlook Plugin

You can download the plugin only if your Filr Administrator has enabled the Filr Outlook Plugin.

- 1 On your workstation, access the Filr web application from a browser.
For information about how to start Micro Focus Filr from a browser, see [Accessing Filr from a Web Browser](#) in the [Filr 3.2: User Access Guide](#).
- 2 Click your linked name in the upper right corner of the page, then click **Download Filr Desktop App**.
- 3 In the Filr Outlook Plugin section, click the **Outlook Plugin** link and save the file to your workstation
To view the Filr Outlook Plugin section, you might need to use the scrollbar on the right side of the page and scroll the page down.
- 4 Ensure that no instance of the Outlook application is up and running.
- 5 Double click the downloaded file and run the installation wizard to install the plugin.

Configuring the Filr Outlook Plugin Settings

To configure the Filr Outlook Plugin settings in Microsoft Outlook:

- 1 Ensure that the Filr Outlook Plugin is installed on your workstation. See [“Downloading and Installing the Filr Outlook Plugin”](#) on page 1

- 2 Launch Microsoft Outlook.
- 3 On the **Home** tab, click  **Settings** in the **Filr Plug-in** group.
NOTE: If the **Filr Plug-in** group is not visible in Microsoft Outlook even after you have installed the Filr Outlook Plugin, Outlook might have been automatically disabled the plug-in. To enable the plug-in, see the [Microsoft website](#).
- 4 On the **Account** tab, specify the following:
 - ♦ **Username/Password:** Specify your Filr username and password to log into the Filr server. Click **Remember Password** to remember your password for future logins.
 - ♦ **Server URL:** Specify the name and the port number of the Filr server that you want to connect to. For example:
filr.mycompany.com:port_number.
Only the HTTPs protocol is supported and is prefixed by default, so you must not specify the protocol in this URL.
- 5 Click **Login** to log into the Filr server. The button toggles to **Logout** after you are successfully logged in to the Filr server.
- 6 On the **Policy** tab, the following options are listed. If your Filr administrator has allowed you define the policy or modify the policy limits, do the following:

NOTE: If the Filr Administrator has enabled you to modify the policy limits, you must specify a value either equal to or less than what the Filr administrator has already specified.

- ◆ **Send attachments using Filr:** Select one of the following:
 - ◆ **Always:** Select this to always upload the attachments to the Filr server and share the link of the uploaded files through the email. You can select this option only if your Filr administrator has allowed you define the policy.
 - ◆ **File size exceeds X MB:** Select this to specify the size beyond which the attachments are uploaded to the Filr server and the link of the uploaded files is shared in the email.
- ◆ **Attachment link expires after: Select one of the following:**
 - ◆ **X days:** Select this to specify the number of days after which the attachment link sent in the email should expire.
 - ◆ **X downloads:** Select this to specify the number of times the attachment is downloaded after which the attachment link sent in the email should expire.
- 7 Click **Apply** to save your changes.
- 8 Click **Cancel** to return to the previous window

Attaching Files in Outlook Email Through Filr

You can now use Microsoft Outlook to add attachments to email through Filr. You can either attach the local files from your computer or the Filr files from your My Files area. Depending on the Filr Outlook policy that is effective, the files are either attached directly to the email or uploaded to the Filr server and the location of the uploaded files is shared in the email.

When you send an email to an external user, the external user should log in to the Filr site and self provision. For more information, see [Sharing with People Outside Your Organization](#) in the [Filr 3.2: User Access Guide](#).

- ◆ [“Prerequisites” on page 2](#)
- ◆ [“Attaching Files from Your Computer” on page 2](#)
- ◆ [“Attaching Files from Filr MyFiles Area” on page 2](#)

PREREQUISITES

Before you attach files to the Outlook email, ensure the following:

- ◆ Network and the Filr server are up and running.
- ◆ The attachment does not contain a file of the type that the Filr Administrator has blocked.

- ◆ The size of the attachment is within the file upload size limit that the Filr Administrator has set.
- ◆ The Filr Appliance storage has sufficient storage space.

ATTACHING FILES FROM YOUR COMPUTER

- 1 Launch Microsoft Outlook.
- 2 Ensure that you have already configured the Filr settings and are logged in to the Filr server. See [“Configuring the Filr Outlook Plugin Settings” on page 1](#).
- 3 Click **File > New Email**.
- 4 Specify the value for the options such as To, CC, Subject as required.
- 5 In the **Filr - Attach Files** group, click  **From PC**.
- 6 Browse through the computer and select the files to attach. Then, click **Open** to attach the files.
- 7 (Conditional) To delete all the attachments from the email, click  **Delete Attachments**.

ATTACHING FILES FROM FILR MYFILES AREA

- 1 Launch Microsoft Outlook.
- 2 Ensure that you have already configured the Filr settings and are logged in to the Filr server. See [“Configuring the Filr Outlook Plugin Settings” on page 1](#).
- 3 Click **File > New Email**.
- 4 Specify the value for the options such as To, CC, Subject as required.
- 5 In the **Filr - Attach Files** group, click  **From Filr**.
- 6 Browse through the MyFiles area and select the files to attach. Then, click **Open** to attach the files.
- 7 (Conditional) To delete all the attachments from the email, click  **Delete Attachments**.

Troubleshooting Email Issues

- ◆ [“Uploading Attachments to the Filr Server Fails” on page 2](#)
- ◆ [“Unable to Send Emails When Drafts Is Selected” on page 3](#)

UPLOADING ATTACHMENTS TO THE FILR SERVER FAILS

When you use the Filr Outlook Plugin to attach files to an Outlook email, the uploading of the attachments to the Filr server might fail because of the following:

- ◆ Network issues or the Filr server is not available.
- ◆ The attachment contains a file of the type that the Filr Administrator has blocked.

- ◆ The size of the attachment exceeds the file upload size limit that the Filr Administrator has set.
- ◆ No sufficient space in the Filr Appliance storage.

. Consequently, Outlook fails to send such emails and save them in the drafts folder.

UNABLE TO SEND EMAILS WHEN DRAFTS IS SELECTED

If you select **Drafts** and then attempt to send an Outlook email having attachments that is sent through Filr, the email is not sent but saved in the **Drafts** folder. To send the email, open the email, select **Inbox**, and then click **Send** on the email.

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