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OpenText Filr 24.4
Using Filr with Microsoft Office and Outlook Applications

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About This Guide

This guide is intended for users using Filr with Microsoft Office and Outlook applications and covers the following topics:

Audience

This guide is intended for Filr users using Filr with Microsoft Office and Outlook applications.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the **comment on this topic** link at the bottom of each page of the online documentation.

Documentation Updates

For the most recent version of the *Filr Administrative User Interface Reference* and other documentation, visit the Filr Documentation website.

Additional Documentation

You can find more information in the Filr documentation, which is accessible from the Filr Documentation website.

1 Overview

The OpenText Filr Plugin for Microsoft Office and Outlook enables you to work with files in your **My Files** ⬚ area of the Filr server directly from a Microsoft Office 2016, 2019, 2022and Office 365 applications such as Excel, Word, Outlook, or PowerPoint. This functionality is only available if your Filr Administrator has enabled this functionality on the appliance.

For information about installing this plugin, see Chapter 2, "Installing the Filr Plugin for Microsoft Office and Outlook," on page 9.

After installing this plugin, you can use the Microsoft applications as follows:

- **Microsoft Outlook:** 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. For more information about working with Filr files directly from Microsoft Outlook, see Chapter 4, "Working with Filr Files Directly From Microsoft Outlook," on page 17.

  NOTE: You can use the Outlook feature only if an Advanced-Edition license is installed on the Filr appliance.

- **Microsoft Excel, Word, PowerPoint:** You can do the following:
  - Browse to a file that is located on a Filr server, open the file, edit it, and then save it back to the Filr server.
  - Create a new file and upload it to the Filr server.
  - Share a file with Filr users.

  For more information about working with Filr files directly from Microsoft Office application, see Chapter 3, "Working with Filr Files Directly From Microsoft Office," on page 11.

2 Installing the Filr Plugin for Microsoft Office and Outlook

To work with files that are on a Filr server directly from a Microsoft Office application such as Excel, Word, Outlook, or PowerPoint, you must install the Filr Plugin for Microsoft Office and Outlook.

Review the following section for information on how to download and install the Filr plugin.

- ◆ "Downloading and Installing the Filr Plugin for Office and Outlook" on page 9

Downloading and Installing the Filr Plugin for Office and Outlook

1 On your workstation, access the Filr web application from a browser.

2 Under CLIENT DOWNLOADS > FILR PLUGIN FOR OFFICE AND OUTLOOK, click DOWNLOAD_INSTRUCTIONS.

3 Click PLUGIN FOR OFFICE & OUTLOOK, then click DOWNLOAD CLIENT.

4 Ensure that no instance of the Office and Outlook applications are up and running.

5 Double click the downloaded file and run the installation wizard to install the plugin.

NOTE: All the user information is deleted when upgrading Outlook plugin in versions earlier than Filr 4.1.1. This issue is resolved on upgrading from Filr 4.1.1 to later versions.

3 Working with Filr Files Directly From Microsoft Office

Filr Plugin for Microsoft Office and Outlook enables you to work with files in your **My Files** area and **Netfolders** area of the Filr server directly from a Microsoft Office application such as Word, Excel, or PowerPoint.

For information about installing this plugin, see Chapter 2, "Installing the Filr Plugin for Microsoft Office and Outlook," on page 9

After you install this plugin, you can do the following in your **My Files** area of the Filr server:

  * Browse to a file that is located on a Filr server, open the file, edit it, and then save it back to the Filr server.
  * Create a new file and upload it to the Filr server.
  * Share a file with Filr users.

This functionality is only available if your Filr Administrator has enabled this functionality on the appliance.

  * "Logging into the Filr Server From a Microsoft Office Application" on page 11
  * "Opening a File From the Filr Server" on page 12
  * "Creating and Saving a New File in the Filr Server" on page 12
  * "Editing and Saving a File to the Filr Server" on page 13
  * "Sharing a File" on page 13
  * "Support for Roaming User Profile" on page 14

Logging into the Filr Server From a Microsoft Office Application

1 Ensure that the Filr Plugin is installed on your workstation. See "Downloading and Installing the Filr Plugin for Office and Outlook" on page 9.

2 Launch the Microsoft application you want to use.

3 Click the **Micro Focus Filr** tab and then click [Settings] in the **Filr Plug-in** group.

NOTE: If the **Filr Plug-in** group is not visible in Microsoft Office even after you have installed the Plugin, Office might have 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.

Opening a File From the Filr Server

From a Microsoft Office application, you can easily browse to a file that is located on a Filr server and open it.

1 Launch the Microsoft Office application.

2 To open an existing file, do one of the following:

- Click **File** > **Open** and then double-click the **Filr** tab.

- Click **Micro Focus Filr** and then click in the **Filr Plug-in** group.

3 Browse to the location from where you want to open a file, select the file, and click **Open**.

Creating and Saving a New File in the Filr Server

You can create a new file in Microsoft Office and save it directly to the Filr server.

1 Launch the Microsoft Office application.

2 To open a new file, click **File** > **New**.

3 Make the necessary changes in the file as required.

4 To save the file, do one of the following:

- Click **File** >**Save As** and then double-click the **Filr** tab.

- Click **Micro Focus Filr** and then click in the **Filr Plug-in** group.

5 Browse to a location where you want to save the file.

6 Specify a name for the file, then use the drop-down list to select the type of extension that you want to use for the file, such as `.docx`.

7 Click **Save**.

Editing and Saving a File to the Filr Server

From a Microsoft Office application, you can easily browse to a file that is located on a Filr server, edit the file and save it.

1 Launch the Microsoft Office application.

2 To open an existing file, do one of the following:

- Click **File** > **Open** and then double-click the **Filr** tab.

- Click **Micro Focus Filr** and then click [Open icon] in the **Filr Plug-in** group.

3 Browse to the location from where you want to open a file, select the file, and click **Open**.

4 Edit the file as required.

5 To save the file, do one of the following:

- Click **File** >**Save As** and then double-click the **Filr** tab.

- Click **Micro Focus Filr** and then click [Save icon] in the **Filr Plug-in** group.

Sharing a File

From a Microsoft Office application, you can easily browse to a file that is located on a Filr server and share the file with Filr users. Before you share a file that you have newly created, you must save the file on the Filr server.

1 Launch the Microsoft Office application.

2 Open the file that you want to share. See "Opening a File From the Filr Server" on page 12.

3 To share the file, do one of the following to display the Filr Share pane in the right hand side of the application:

- Click **File** >**Share**, double-click the **Filr** tab, and then click [Share with People icon].

- Click **Micro Focus Filr** and then click [Share icon] in the **Filr Plug-in** group.

4 In the Filr Share pane, specify the name of the user or group or the email address of the user with whom you want to share the file.

5 Select the shared-access rights that you want to grant to the user or group. See Understanding Shared-Access Rights.

NOTE: You cannot assign shared-access rights when sharing with the public or when distributing a File Link.

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6 In the **Expires** field, select from the following options:

- **Never:** The share never expires.

- **On:** Select a given day for the rights to expire.

  Rights expire at the beginning of the day that you select.

- **After:** Specify a certain number of days for the rights to remain active.

  Each day is counted as a 24-hour period from the time that you set the expiration.

7 In the **Allow re-share with** section, select whether you want them to be able to share with internal users, external users, or via a File Link.

8 If you want to include a personal note in the share, specify a note in the **Note** field.

Only the users and groups that you share with can read the note.

The share note cannot exceed 255 characters in length.

9 Click **Share**.

The **Shared with** section lists the users with whom you have most recently shared the file.

Support for Roaming User Profile

The roaming user profile is now enabled for Filr Office and Outlook plugin.

The benefits are:

- When a user logs in and sets a policy for the Outlook plugin the policies are retained when the user logs in to another workstation.

- If a user installs Filr Office and Outlook plugin on a workstation it will be available to all the users who log in to that workstation.

The support matrix is:

- Microsoft Windows 7
- Microsoft Windows 10
- Microsoft Office and Outlook 2013
- Microsoft Office and Outlook 2016
- Microsoft Office 365

Installation location: The plugin will be installed at `C:\Program Files (x86)\Micro Focus\Micro Focus Filr Plugin for Office and Outlook`.

Enabling Roaming User Profiles

1 Set up roaming user profiles.

2 Install the Filr Office and Outlook plugin `FilrPluginforOfficeandOutlook-4.2.0.msi`.

3 (Conditional) You can configure the following registry entries at `HKEY_CURRENT_USER\Software\Micro Focus\Micro Focus Filr Plugin for Office and Outlook`:

Windows Registry Value Name	Type	Default Value
expiryCondition	REG_DWORD	1 for attachmentLifeTime, 0 for attachmentDownloadLimit
attachmentDownloadLimit	REG_DWORD	Expire the link after the number of downloads configured in attachmentDownloadLimit
attachmentLifeTime	REG_DWORD	Expire the link after the number of days configured in attachmentLifeTime

Windows Registry Value Name	Type	Default Value
uploadCondition	REG_DWORD	0 for Always, 1 for fileSizeLimitInMB
fileSizeLimitInMB	REG_DWORD	File size exceeds fileSizeLimitInMB in MB
SavedSettings	REG_DWORD	1 to pick above policies from registry, 0 to get settings configured by Administrator from server
SavePassword	REG_DWORD	1 to remember password, otherwise 0
Address	REG_SZ	Filr server address (for example, "filr.microfocus.com")
Port	REG_SZ	Port number of the Filr server (for example, "8443")

4 Working with Filr Files Directly From Microsoft Outlook

Filr Plugin for Microsoft Office and Outlook lets you integrate 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. For information about installing this plugin, see Chapter 2, "Installing the Filr Plugin for Microsoft Office and Outlook," on page 9.

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.

Logging into the Filr Server From a Microsoft Outlook Application

1 Ensure that the Filr Plugin is installed on your workstation. See "Downloading and Installing the Filr Plugin for Office and Outlook" on page 9

2 Launch Microsoft Outlook.

3 Click the **Micro Focus Filr** tab and then 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 FilrOutlook Plugin, Outlook might have 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.

Configuring the Outlook Policy Settings

1 Ensure that the Filr Plugin is installed on your workstation. See "Downloading and Installing the Filr Plugin for Office and Outlook" on page 9

2 Log into the Filr Server from Outlook. See "Logging into the Filr Server From a Microsoft Outlook Application" on page 17

3 Launch Microsoft Outlook.

4 Click the **Micro Focus Filr** tab and then 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 FilrOutlook Plugin, Outlook might have been automatically disabled the plug-in. To enable the plug-in, see the Microsoft website.

5 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.

6 Click **Apply** to save your changes.

7 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 the OpenText Filr 24.4 - Frequently Asked Questions.

- "Prerequisites" on page 18
- "Attaching Files from Your Computer" on page 19
- "Attaching Files from Filr My Files or Netfolders Area" on page 19

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. You must not attach more than 10 files. We recommend that the total size of all the attached files does not exceed 500 MB.
- 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 Outlook Policy Settings" on page 17.

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 My Files or Netfolders 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 Outlook Policy Settings" on page 17.

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 **My Files** area or **Netfolders** 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**.

Support for Roaming User Profile

The roaming user profile is now enabled for Filr Office and Outlook plugin. For more information, see "Support for Roaming User Profile" on page 14.

5 Troubleshooting

Troubleshooting Email Issues

Uploading Attachments to the Filr Server Fails

When you use the Filr 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.