

# Filr 3.2

## Desktop Application Guide for Windows

June 2017

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# Contents

<b>About This Guide</b>	<b>5</b>
<b>1 Overview</b>	<b>7</b>
<b>2 Installing, Configuring, or Upgrading the Filr Desktop Application</b>	<b>9</b>
2.1 Support Matrix	9
2.2 Supported Languages	9
2.3 Downloading and Installing the Filr Desktop Application	10
2.4 Logging in to the Filr Desktop Application	10
2.4.1 Logging in the First Time	10
2.4.2 Logging in After the Desktop Is Configured	11
2.4.3 Logging in as a Different User	11
2.5 Configuring the Filr Desktop Console	11
2.6 Upgrading the Filr Desktop Application	12
<b>3 Uninstalling the Filr Desktop Application</b>	<b>13</b>
<b>4 Understanding Filr Desktop Application Operations</b>	<b>15</b>
4.1 Understanding Synchronization	15
4.1.1 When Synchronization Occurs	15
4.1.2 Which Folders Are Synchronized	15
4.1.3 What Actions Are Supported	16
4.1.4 Manually Synchronizing Files and Folders	16
4.1.5 Viewing Pending Synchronization Changes	17
4.2 Working With the Filr Desktop Application	17
4.3 Understanding the Filr Desktop Console	17
4.3.1 Account	17
4.3.2 General	17
4.3.3 Storage	18
4.3.4 Application	18
4.3.5 Pending Changes	18
4.3.6 Recent Activity	18
4.3.7 System Alerts	18
4.4 Understanding Filr Operations	18
4.4.1 Filr Operations Summary Matrix	19
4.4.2 Make Available Offline	19
4.4.3 Make Available Online Only	19
4.4.4 Remove Cache Files	20
4.4.5 Synchronize Now	20
4.4.6 Undo Local Changes	20
4.4.7 Viewing Filr Files from Your Computer	20
4.4.8 Manually Synchronizing Offline Files and Folders	21
4.4.9 Launching Filr in a Browser from the Filr Desktop	21
4.4.10 Commenting on a File and Viewing Comments	21
4.4.11 Sharing A File or Folder	21
4.4.12 Distributing a Link to a File	24
4.4.13 Uploading a File	24
4.4.14 Viewing Filr Properties for a File or Folder	25

4.5	Working With the Filr Desktop Console . . . . .	25
4.5.1	Changing Your Filr Account Information . . . . .	25
4.5.2	Understanding and Viewing Your Data Quota . . . . .	26
4.5.3	Changing the Location on Your File System Where Filr Files Are Synchronized. . . . .	26
4.5.4	Removing Cache Files. . . . .	27
4.5.5	Preventing Application-Driven Downloads From Filling Up the Local Disk . . . . .	27
4.5.6	Understanding and Resolving Synchronization Issues . . . . .	28
4.5.7	Viewing Recent Activity . . . . .	29
4.5.8	Viewing System Alerts . . . . .	29
4.6	Customizing the Branding of the Desktop Application . . . . .	29
4.7	Balloon Notifications Might Not Display . . . . .	30
<b>5</b>	<b>Working with Filr Files Directly From Microsoft Office</b>	<b>31</b>
5.1	Adding Filr as a Storage Service . . . . .	31
5.2	Creating and Saving a New File in the Filr Server . . . . .	31
5.3	Opening a File From the Filr Server. . . . .	32
5.4	Editing and Saving a File to the Filr Server . . . . .	32
<b>6</b>	<b>Troubleshooting</b>	<b>33</b>
6.1	Out of Sync Files . . . . .	33
6.2	Log Files. . . . .	33
6.3	Upgrade Issues . . . . .	33
6.3.1	Older Version of Filr Icon Displayed on the Windows Desktop Application Post Upgrading the Desktop Application . . . . .	34
6.3.2	Windows Desktop Might Hang When Upgrading the Desktop Application . . . . .	34

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# About This Guide

This guide is for Filr desktop users and covers the following topics:

- ♦ Chapter 1, “Overview,” on page 7
- ♦ Chapter 2, “Installing, Configuring, or Upgrading the Filr Desktop Application,” on page 9
- ♦ Chapter 3, “Uninstalling the Filr Desktop Application,” on page 13
- ♦ Chapter 4, “Understanding Filr Desktop Application Operations,” on page 15
- ♦ Chapter 5, “Working with Filr Files Directly From Microsoft Office,” on page 31
- ♦ Chapter 6, “Troubleshooting,” on page 33

## Audience

This guide is intended for Filr desktop users.

## 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 *Micro Focus Filr Administrative User Interface Reference* and other documentation, visit the [Filr 3 Documentation website \(http://www.novell.com/documentation/filr-3\)](http://www.novell.com/documentation/filr-3).

## Additional Documentation

You can find more information in the Micro Focus Filr documentation, which is accessible from the [Filr 3 Documentation website \(http://www.novell.com/documentation/filr-3\)](http://www.novell.com/documentation/filr-3).



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# 1 Overview

Micro Focus Filr allows you to easily access all your files and folders from your desktop, browser, or a mobile device. In addition, you can promote collaboration around your files by sharing files and folders with others. For a more detailed overview of Micro Focus Filr, see [About Filr](#) in the [Filr 3.2: User Access Guide](#).

In addition to accessing Filr from your desktop, you can also access it in the following ways:

- ♦ From a web browser on your workstation, as described in the [Filr 3.2: User Access Guide](#).
- ♦ From a mobile device, as described in the [Micro Focus Filr Mobile App 3.2 Quick Start](#).

You can synchronize your Micro Focus Filr files with your computer and then modify the files directly without accessing the Filr site. Additions, modifications, and other actions are synchronized between Filr and your computer.

Your Filr administrator must enable the Filr desktop application to be used with the Filr site before it can be used. For more information, see “[Desktop Access—Default Settings](#)” in the [Filr 3.2: Administrative UI Reference](#).





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# 2 Installing, Configuring, or Upgrading the Filr Desktop Application

This section details the system requirements and steps for installing and configuring the Filr Desktop application.

- ♦ [Section 2.1, “Support Matrix,” on page 9](#)
- ♦ [Section 2.2, “Supported Languages,” on page 9](#)
- ♦ [Section 2.3, “Downloading and Installing the Filr Desktop Application,” on page 10](#)
- ♦ [Section 2.4, “Logging in to the Filr Desktop Application,” on page 10](#)
- ♦ [Section 2.5, “Configuring the Filr Desktop Console,” on page 11](#)
- ♦ [Section 2.6, “Upgrading the Filr Desktop Application,” on page 12](#)

## 2.1 Support Matrix

The following table list the prerequisites for installing the Filr Desktop application:

Windows Platforms	♦ Windows 10, 8.1, 7
Filr Server	♦ Filr 3.2

## 2.2 Supported Languages

The default language that the Filr desktop application is displayed in is defined by the language set on the workstation where the application is running.

The Filr desktop application supports the following languages:

♦ Czech	♦ Hungarian
♦ Chinese (Simplified)	♦ Italian
♦ Chinese (Traditional)	♦ Japanese
♦ Danish	♦ Polish
♦ Dutch	♦ Portuguese (Brazil)
♦ English	♦ Russian
♦ Finnish	♦ Spanish
♦ French	♦ Swedish
♦ German	

## 2.3 Downloading and Installing the Filr Desktop Application

- 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 Click either the **Windows x86 Client** link or the **Windows x64 Client** link to download the application appropriate for your operating system.
- 4 After the download completes, open the `MicroFocusFilrSetup-x86-3.x.exe` file or the `MicroFocusFilrSetup-x64-3.x.exe` file, depending on whether you have a 32-bit or 64-bit operating system.
- 5 (Conditional) If you do not have Microsoft .NET Framework 4.5 or later already installed on your workstation, you are prompted to accept a license agreement and install it. Installing Microsoft .NET Framework requires that you reboot your computer.
- 6 Click **Next**.
- 7 Accept the license agreement, then click **Next**.
- 8 Change the installation location for the Filr desktop application, or click **Next** to accept the default location.
- 9 Click **Install**.
- 10 Click **Finish** when the installation is complete, then continue with [“Logging in the First Time” on page 10](#).

## 2.4 Logging in to the Filr Desktop Application

When you log in to the Filr Desktop Application, you might be prompted for additional authentication steps in addition to the typical username and password authentication if your Filr administrator has enabled multi-factor authentication. For more information about multi-factor authentication, see [Using Multi-Factor Advanced Authentication with Filr](#) in the [Filr 3.2: Maintenance Best Practices Guide](#).

Depending on whether you are logging in to Filr for the first time, logging in after the desktop is configured, or logging in as a different user, review the following sections.

- ♦ [Section 2.4.1, “Logging in the First Time,” on page 10](#)
- ♦ [Section 2.4.2, “Logging in After the Desktop Is Configured,” on page 11](#)
- ♦ [Section 2.4.3, “Logging in as a Different User,” on page 11](#)

### 2.4.1 Logging in the First Time

After you download and install the Filr desktop application, you are prompted to log in to the application. For more information about downloading and installing the Filr desktop application, see [“Downloading and Installing the Filr Desktop Application” on page 10](#).

To log in to the Filr Desktop Application:

- 1 In the Micro Focus Filr Login dialog, specify the following information:  
**Username:** Specify the Filr user name that you use to log in to the Filr site.

**Password:** Specify the Filr password that you use to log in to the Filr site.

**Remember password:** Select this option to have the Filr desktop application remember your password.


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**NOTE:** The Filr administrator can disable this option.


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**Server URL:** Specify the URL for the Filr site where you want to synchronize files to your computer. For example, `https://Filr.mycompany.com:8443`.

- 2 (Conditional) If your Filr administrator has enabled multi-factor authentication, provide the additional authentication details in addition to the typical username and password authentication details.
- 3 Click **Login**.

The Filr desktop application is now running, and the **Filr** icon  is visible in the notification area.

## 2.4.2 Logging in After the Desktop Is Configured


To log in to the Filr application subsequent to the first time login, right-click the **Filr** icon  in the notification area and click **Login**.

## 2.4.3 Logging in as a Different User

To login as a different user, see [“Changing Your Filr Account Information” on page 25](#).

# 2.5 Configuring the Filr Desktop Console

You can use the Filr Desktop Console to configure information such as login details and file storage location. You can also use the console to view information about the pending synchronization changes, the recent Filr activities, and system alerts:

- 1 Log into the Filr Desktop Application.  
For information about logging into the desktop application, see [Section 2.4, “Logging in to the Filr Desktop Application,” on page 10](#).
- 2 Right-click the **Filr** icon  in the notification area and click **Open Filr console**.
- 3 In the Filr Desktop Console, you can configure the following:
  - ♦ **Edit the login details:** The **Account** tab displays the login information that you specified during the previous login. You can edit the login information as per your requirement. For more information, see [Section 2.4, “Logging in to the Filr Desktop Application,” on page 10](#).
  - ♦ **Edit the general Filr details:** The **General** tab lets you specify whether you want Filr to automatically launch when the computer starts.
  - ♦ **Edit the storage location:** The **Storage** tab lets you specify the location for synchronizing the Filr files. By default, Filr files are synchronized to the `c:\Users\username\Filr` folder on your file system.

You can also use the console to view the following information:

- ♦ **The pending synchronization changes:** The **Pending Changes** tab lets you view the synchronization changes that are in progress.
- ♦ **The recent activities:** The **Recent Activity** tab lets you view the activities that were performed recently.

- ♦ **The system alerts:** The **System Alerts** tab lets you view the alerts that the desktop application generates.

## 2.6 Upgrading the Filr Desktop Application

Use the Filr 3.2 desktop software to upgrade your existing installation of Filr 3.0 desktop application with the latest patch installed.

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**IMPORTANT:** Before you upgrade the Desktop Application, you must do the following to exit the Filr client:

1. Press and hold Shift, then right-click the Filr icon in the Windows system tray.
2. Click **Exit**.

If you upgrade the Filr Desktop Application while a previous version is running, the overlay icons might not display. For more information about this issue, see the *Filr Desktop Application Release Notes* on the [Filr 3 Documentation website](#).

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# 3 Uninstalling the Filr Desktop Application

Before you uninstall the Filr desktop application, close all the open Filr files and applications.

Uninstalling the Filr desktop application:

- ♦ Removes all Filr application files and configuration data.
- ♦ Does not remove files and folders that were made available offline (synced to your local disk) through Filr.

As part of the uninstall, previously downloaded and synchronized files and folders are moved to the following folder:

`C:\Users\UserName\Filr (archived)(number)`

where *number* is a numeric value that begins with 1 and gets incremented by 1 with every instance of filr uninstallation.

You can delete the folders if you no longer need them. However, the files and folders still exist on the Filr server.

To uninstall Filr desktop application, do the following:

- 1 Using the Windows Control Panel, uninstall the Filr desktop application.



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# 4 Understanding Filr Desktop Application Operations

- [Section 4.1, “Understanding Synchronization,” on page 15](#)
- [Section 4.2, “Working With the Filr Desktop Application,” on page 17](#)
- [Section 4.3, “Understanding the Filr Desktop Console,” on page 17](#)
- [Section 4.4, “Understanding Filr Operations,” on page 18](#)
- [Section 4.5, “Working With the Filr Desktop Console,” on page 25](#)
- [Section 4.6, “Customizing the Branding of the Desktop Application,” on page 29](#)
- [Section 4.7, “Balloon Notifications Might Not Display,” on page 30](#)

## 4.1 Understanding Synchronization

- [Section 4.1.1, “When Synchronization Occurs,” on page 15](#)
- [Section 4.1.2, “Which Folders Are Synchronized,” on page 15](#)
- [Section 4.1.3, “What Actions Are Supported,” on page 16](#)
- [Section 4.1.4, “Manually Synchronizing Files and Folders,” on page 16](#)
- [Section 4.1.5, “Viewing Pending Synchronization Changes,” on page 17](#)

### 4.1.1 When Synchronization Occurs

Synchronization from the Filr desktop application to the Filr server occurs immediately after the file is saved and closed; synchronization from the Filr server to the Filr desktop application occurs at an interval designated by your Filr administrator. The default is every 15 minutes. If the server becomes unavailable, the desktop client attempts to contact the server every minute until a connection is re-established.

You can manually synchronize files if you do not want to wait for the scheduled synchronization. For more information, see [“Manually Synchronizing Files and Folders” on page 16](#).

### 4.1.2 Which Folders Are Synchronized

Filr synchronizes files to your workstation when the files are located in the following locations:

**My Files:** Files that are located in your My Files area on the Filr site are synchronized to your workstation by default. When you add files to the My Files folder from your workstation (C:\Users\username\Filr\My Files), the files are automatically synchronized to Filr at the next synchronization.

**Shared with Me:** Files that are located in your Shared with Me area on the Filr site are synchronized to your workstation by default. You can edit files in your Shared with Me area and the edits are synchronized to Filr, if you have Editor or Contributor rights. However, you cannot add files to the root

of the **Shared with Me** folder from the Filr desktop application on your workstation (C:\Users\username\Filr\Shared with Me/). If you do, the files are not synchronized to Filr. You can add files to folders that have been shared with you, if you have Contributor rights to the folder.

**Net Folders:** Files that are located in Net Folders are not synchronized to your workstation by default.

Net Folders are folders and files on your corporate file system. Corporate files can be files on your home directory, files on a mapped drive, or files on a remote server. Filr gives you seamless access to these files, regardless of their location. The corporate files that you have access to are defined by your Filr administrator.

Files located at the root of the C:\Users\username\Filr folder cannot be synchronized. Instead, add files to one of the appropriate subfolders (**My Files** or **Net Folders**).

### 4.1.3 What Actions Are Supported

When you perform any of the following actions on folders and documents within the Filr folder on your file system, the action is synchronized between your computer file system and the Filr server at the next synchronization:

- ♦ Create documents and folders
- ♦ Copy documents and folders
- ♦ Comment on documents
- ♦ Delete documents and folders

Documents and folders that you delete from the Filr desktop application are also deleted on the server, as long as you have rights to delete it. However, this is not always true when deleting documents from the Shared with Me area.

If you delete a document or folder from the Shared with Me area and that document or folder has been directly shared with you, it is no longer synchronized to the Filr desktop application and the documents and folders remain on the server.

If you delete a document or folder that is a subfolder of a folder that was shared with you, or if the document is located in a folder that was shared with you, the document or folder is deleted from server if you have sufficient rights to delete it.

- ♦ Modify documents
- ♦ Move documents and folders
- ♦ Rename documents and folders
- ♦ Share documents and folders

### 4.1.4 Manually Synchronizing Files and Folders

You can manually synchronize files and folders between Filr and your computer if you do not want to wait for the scheduled synchronization. Files must be closed before they can be synchronized.

To manually synchronize all your files:


- 1 Right-click the **Filr** icon  in the notification area, then click **Synchronize now**.

To manually synchronize an individual file or folder:



- 1 Navigate to the file or folder that you want to synchronize.
- 2 Right-click the file or folder, then click **More Filr Options > Synchronize now**.










## 4.1.5 Viewing Pending Synchronization Changes

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 Click **Pending Changes**.

## 4.2 Working With the Filr Desktop Application

After you install the Filr desktop application and log in to the application, the Filr desktop application runs and the **Filr** icon  is visible in the notification area. Clicking  opens the Filr folder. You can do the following:

- To open the Filr folder, right-click  and then click **Open Filr folder**.
- To launch the Filr console, right-click  and then click **Open Filr console**.
- To access Filr using a browser, right-click  and then click **Visit Filr on the web**.
- To manually synchronize all your files, right-click  and then click **Synchronize now**.
- To logout of the Desktop Application, right-click  and then click **Logout**.
- To log into the Desktop Application, right-click  and then click **Login**.
- To view the Filr version, right-click  and then click **About *Company Name* Filr**.
- To view the help file, right-click  and then click **Help**.

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**NOTE:** When you right-click , the **Exit** option is no longer listed. To exit the Filr desktop application, press **Shift** key and right-click . Then, click **Exit**.

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## 4.3 Understanding the Filr Desktop Console

The Filr Desktop Console include the following options:

### 4.3.1 Account

- Allows you to change the user account information. For more information, see [“Changing Your Filr Account Information” on page 25](#).
- Displays your data quota. For more information, see [“Understanding and Viewing Your Data Quota” on page 26](#).

### 4.3.2 General

- Allows you to specify whether you want Filr to automatically launch when the computer starts.

### 4.3.3 Storage

- ♦ Allows you to specify the location for synchronizing the Filr files. By default, Filr files are synchronized to the C:\Users\username\Filr folder on your file system. For more information, see [“Storage” on page 18](#)
- ♦ Allows you to specify how long locally cached files are retained after they were last accessed or modified. For more information, see [“Removing Cache Files” on page 27](#).

### 4.3.4 Application

- ♦ Filr now lets your system administrator control application-driven downloads and prevent Filr from filling up local disks. The Application page summarizes the action that your administrator has taken. If restrictions are in place, the page has a link for viewing the applications that are allowed, blocked, or both. For more information, see [“Preventing Application-Driven Downloads From Filling Up the Local Disk” on page 27](#).

### 4.3.5 Pending Changes

- ♦ Displays information about sync actions that did not complete successfully. You can retry sync actions or undo changes to the Filr workspace. For more information, see [“Understanding and Resolving Synchronization Issues” on page 28](#).

### 4.3.6 Recent Activity

- ♦ Displays activity that has recently taken place in the Filr desktop application. For more information, see [“Viewing Recent Activity” on page 29](#).

### 4.3.7 System Alerts

- ♦ Displays various alerts such as new software updates, expired passwords, server downtime, and so forth. For more information, see [“Viewing System Alerts” on page 29](#).

## 4.4 Understanding Filr Operations

The following sections provide information about the various Filr operations:

- ♦ [Section 4.4.1, “Filr Operations Summary Matrix,” on page 19](#)
- ♦ [Section 4.4.2, “Make Available Offline,” on page 19](#)
- ♦ [Section 4.4.3, “Make Available Online Only,” on page 19](#)
- ♦ [Section 4.4.4, “Remove Cache Files,” on page 20](#)
- ♦ [Section 4.4.5, “Synchronize Now,” on page 20](#)
- ♦ [Section 4.4.6, “Undo Local Changes,” on page 20](#)
- ♦ [Section 4.4.7, “Viewing Filr Files from Your Computer,” on page 20](#)
- ♦ [Section 4.4.8, “Manually Synchronizing Offline Files and Folders,” on page 21](#)
- ♦ [Section 4.4.9, “Launching Filr in a Browser from the Filr Desktop,” on page 21](#)
- ♦ [Section 4.4.10, “Commenting on a File and Viewing Comments,” on page 21](#)
- ♦ [Section 4.4.11, “Sharing A File or Folder,” on page 21](#)

- [Section 4.4.12, “Distributing a Link to a File,” on page 24](#)
- [Section 4.4.13, “Uploading a File,” on page 24](#)
- [Section 4.4.14, “Viewing Filr Properties for a File or Folder,” on page 25](#)

## 4.4.1 Filr Operations Summary Matrix

Operation	Folders	Files
Comment		✓
Get file link		✓
Get Filr information	✓	✓
Make available offline	✓	✓
Make available online only	✓	✓
Share	*✓	✓
Synchronize now	**✓	**✓
Undo local changes	***✓	***✓

\* You cannot share folders from within Net Folders.

\*\* You can synchronize only offline files and folders.

\*\*\* You can undo local changes only if the changes made to offline files have not yet synchronized with the server.

## 4.4.2 Make Available Offline

Filr downloads the selected file or the selected folder and its contents to your local disk.

**Available-offline** files and folders are periodically synchronized with Filr so that you can access them on your local disk, even when you are not logged in to Filr.

To make a file or folder available offline:

- 1 Right-click the file or the folder.
- 2 Click **More filr options** > **Make available offline**.

## 4.4.3 Make Available Online Only

Filr removes the copy of the file or folder from the local disk. However, the file or folder remains online.

**NOTE:** You can make individual files and folders online. However, you cannot directly make a file that is within an offline folder to be available online. To make such a file online, you must make the folder online.

To make a file or folder available online only:

- 1 Right-click the file or the folder.
- 2 Click **More filr options** > **Make available online-only**.

## 4.4.4 Remove Cache Files

When an online file, which is not yet available offline, is accessed either by an application or by double-clicking, a copy of the file is cached locally. You can specify how long locally cached files are retained after they were last accessed. For more information, see [“Removing Cache Files” on page 27](#).

## 4.4.5 Synchronize Now

Synchronizes the selected files and folders that are available offline.

You can synchronize offline files and folders to the Filr server:

- ♦ To synchronize specific offline file or folder, right-click the file or folder and click **More filr options** > **Synchronize now**.
- ♦ To synchronize all offline files and folders, right-click the Filr icon in the Windows system tray and click **Synchronize now**.

## 4.4.6 Undo Local Changes

To revert any changes made to a file or folder that cannot be synchronized to the Filr server, do the following:

- 1 Right-click the file or the folder.
- 2 Click **More filr options** > **Undo local changes**.

## 4.4.7 Viewing Filr Files from Your Computer

- 1 Click the **Filr** icon  in the notification area.  
or

Right-click the **Filr** icon  in the notification area, then click **Open Filr folder**.

You can access the Filr folder directly from your file system. The Filr folder is typically in the following location:

```
c:\Users\username\Filr
```

The Filr folder is also located in your Favorites and in your Libraries.

For information on how to change the default location, see [“Storage” on page 18](#).

For specific information about file synchronization between your workstation and Filr, see [“Understanding Synchronization” on page 15](#).

## 4.4.8 Manually Synchronizing Offline Files and Folders

You can manually synchronize files and folders between Filr and your computer if you do not want to wait for the scheduled synchronization. Files must be closed before they can be synchronized.

To manually synchronize all your files:

- 1 Right-click the **Filr** icon  in the notification area, then click **Synchronize now**.

To manually synchronize an individual file or folder:

- 1 Navigate to the file or folder that you want to synchronize.
- 2 Right-click the file or folder, then click **More filr options >Synchronize now**.

## 4.4.9 Launching Filr in a Browser from the Filr Desktop

You can launch Filr in a browser by using the Filr desktop application.

- 1 Right-click the **Filr** icon  in the notification area, then click **Visit Filr on the web**.

## 4.4.10 Commenting on a File and Viewing Comments


You can comment on a file or view the comments only if your Filr administrator has enabled you to do so.

- 1 Navigate to the file that you want to comment on or view comments for.
- 2 Right-click the file, then click **Comment**.

The Filr Comments dialog box is displayed, listing all existing comments that are associated with the file.

- 3 In the comment field, specify your comment, then click **Send**.

or

To reply to an existing comment, click the **Reply** icon  next to the comment that you want to reply to, then click **Send**.

## 4.4.11 Sharing A File or Folder

Filr provides various methods of making files and folders available to others. How you decide to make files available might depend on various factors, such as the sensitivity of the information you are sharing or the relevance of information to certain individuals.

- ♦ **Sharing with individual users and groups:** Sharing lets you share files and folders with specific users and groups internal to your organization or with specific users external to your organization. When you share a file or folder, you also assign one of the shared-access rights defined in “[Understanding Shared-Access Rights](#)” in the *Filr 3.2: User Access Guide*.

Sharing with specific users and groups provides the greatest level of security for your files and folders. Users receive a notification about the shared item, and the item is displayed in their Shared with Me area.

For more information, see “[Sharing Files and Folders](#)” in the *Filr 3.2: User Access Guide*.

- ♦ **Distributing a File Link:** You can distribute a link (URL) to a file. When you distribute a link to a file, any user with the link can access the file. However, the file is not displayed in the Public area, so users must have direct access to the link to view the file.

For information about how to distribute a File Link, see “[Distributing a Link to a File](#)” in the *Filr 3.2: User Access Guide*.

- ♦ **Sharing with the Public:** When you share an item with the Public, any person with the URL to the Filr site can view the file in the Public area.

For information about how to share files and folders with the Public, see “[Sharing Files and Folders](#)” in the *Filr 3.2: User Access Guide*.

You can share files and folders directly from the Filr desktop application:

- 1 Navigate to the file or folder that you want to share.
- 2 Right-click the file or folder, then click **Share**.

The Filr Share dialog box is displayed.

- 3 In the **Add a User, Group, or Email** option, begin typing the name of a user or group that you want to share with, then click the name when it appears in the drop-down list.

or

Specify the complete email address of the external user that you want to share with, then press Enter.

- 4 (Optional) Repeat [Step 3](#) to share with additional users.
- 5 (Conditional) To modify access settings for an individual user:

**5a** In the **Shared with** section, select the user whose access settings you want to modify.

**5b** Choose from the following access settings to modify:

**Access Rights:** Grant Viewer, Editor, or Contributor access rights. (Contributor applies only to folders.)

**Expires:** Specify when the share will expire.

You can configure the share to expire either after a given number of days (each day is counted as a 24-hour period from the time that you set the expiration) or on a specific day (rights expire at the beginning of the day that you select).

**Internal Users:** Allow share recipients to re-share the item with internal users.

**External Users:** Allow share recipients to re-share the item with external users.

**All Public:** Allow share recipients to re-share the item with the public.

**File Link:** Allow share recipients to re-share the item via a File Link.

For more information about File Links, see “[Distributing a Link to a File](#)” on page 24.

**Note:** Include a personal note to the share recipients. Only share recipients can read the note.

- 6 (Conditional) To modify access settings for multiple users simultaneously:

**6a** Hold the Ctrl key and select the users in the **Shared with** section whose access settings you want to modify.

**6b** Choose from the following access settings to modify.

Access settings that you leave undefined retain any individual access settings that are present on a given user. Access settings that you define are modified for each user that is currently selected.

**Access Rights:** Grant one of the following access roles to the user or group:

- ♦ **Viewer:** Users can do the following:
  - ♦ **Shared Folders:** View
  - ♦ **Shared Subfolders:** View
  - ♦ **Files in Folders and Subfolders:** View and Read
- ♦ **Editor:** Users can do the following:
  - ♦ **Shared Folders:** View
  - ♦ **Shared Subfolders:** View
  - ♦ **Files in Folders and Subfolders:** View, Read, and Write
- ♦ **Contributor (Applies only to folders in My Files):** Users can do the following:
  - ♦ **Shared Folders:** View, Rename, Delete, or Copy

---

**IMPORTANT:** Exercise caution when granting Contributor shared-access rights because, as stated above, share recipients can rename, copy, and even delete the folder from your My Files area.

---

- ♦ **Shared Subfolders:** View, Rename, Delete, Copy, and Move
- ♦ **Files in Folders and Subfolders:** View, Rename, Delete, Copy, Move, Read, and Write

**Expires:** Set a date when the share will expire.

You can configure the share to expire either after a given number of days (each day is counted as a 24-hour period from the time that you set the expiration) or on a specific day (rights expire at the beginning of the day that you select).

**Internal Users:** Allow share recipients to re-share the item with internal users.


**External Users:** Allow share recipients to re-share the item with external users.

**All Public:** Allow share recipients to re-share the item with the public.

**File Link:** Allow share recipients to re-share the item via a File Link.

For more information about File Links, see [“Distributing a Link to a File” on page 24](#).

**Note:** Include a personal note to the share recipients. Only share recipients can read the note.

- 7 (Optional) Click **Make Public**  to make the item publicly available. Then in the **Shared with** section, tap the **all users** user that was just added and set the access control settings for the public.
- 8 (Optional) In the Notify section, click the drop-down list and choose from the following notification options:
  - None:** Send no notifications.
  - All recipients:** All recipients in the share list are notified.
  - Only newly added recipients:** Only recipients that you add to the share list are notified.
  - New and modified recipients:** Only new recipients and those whose share rights you are modifying are notified.
- 9 Click **Save**.

## 4.4.12 Distributing a Link to a File

You can distribute a link (URL) to a file. When you distribute a link to a file, any user with the link can access the file. However, the file is not displayed in the Public area, so users must have direct access to the link in order to access the file.

- 1 Navigate to the file or folder for which you want to distribute a link.
- 2 Right-click the file or folder, then click **Get File Link**.

The File Link dialog box is displayed.

If a File Link has not been previously generated for the file, click **Get File link**.

The following URLs are created for accessing the file:

**Download File Link:** Depending on browser settings, users are either prompted to download or open the file, or the file is automatically displayed in the browser. This link allows users to access the file directly.

**View File Link:** This link displays the file in a web browser in an HTML view. If the file type cannot be displayed in a web browser, this link is not available.

The File Link is now included in the Share dialog. You can modify the expiration date or note associated with the link, or you can remove the link so that the file is no longer accessible to users with the link by accessing the Share dialog, as described in [“Sharing A File or Folder” on page 21](#).

- 3 (Optional) Click the drop-down arrow next to **Expires** to set a date for the share to expire.

You can configure the share to expire either after a given number of days (each day is counted as a 24-hour period from the time that you set the expiration) or on a specific day (rights expire at the beginning of the day that you select).

- 4 Choose from the following actions for distributing the File link:

- ♦ **Copy:** Allows you to select either the Download or View link to copy and copies the link to the clipboard. You can then paste the link into another application.
- ♦ **Email:** Uses your workstation's default email application to email the link. Both the Download links and the View links are included in the email.
- ♦ **Filr Email:** Uses Filr's built-in email system to email the link. Both the Download links and the View links are included in the email.
- ♦ **Delete:** Deletes the File link so that users are not able to access the file by using the current links.

- 5 (Optional) After you create the File Link, you can modify user access and perform other management functions for the File Link by accessing the Share dialog, as described in [“Sharing A File or Folder” on page 21](#).

## 4.4.13 Uploading a File

By default, Filr does not restrict uploading files based on the file type. However, beginning with Filr 3.1, Filr administrators can modify this.

If your Filr administrator has restricted the uploading of a type of file, any attempt to upload the restricted type of file is blocked. An error message displays in Recent Activity page of the desktop console and a balloon notification displays on the desktop if your Filr Administrator has allowed balloon notifications.



## 4.4.14 Viewing Filr Properties for a File or Folder

You can view the following Filr properties that are associated with your files and folders:

- ♦ File name
- ♦ File path (this is the path to the file or folder from within the Filr system)
- ♦ File size (applies to files only, not folders)
- ♦ User who created the file or folder
- ♦ Date the file or folder was created
- ♦ Date the file or folder was modified
- ♦ User who shared the file
- ♦ Users who the file is shared with

To view Filr properties for a file or folder:

- 1 Right-click the file or folder for which you want to view the Filr properties.
- 2 Click **Properties** to launch the native Windows properties dialog.
- 3 Click the **Micro Focus Filr** tab.  
The Filr properties for the file or folder are displayed.
- 4 (Optional) If you have rights to share the file or folder, you can click **Share** to launch the Filr Share dialog box.


## 4.5 Working With the Filr Desktop Console

Review the following sections for working with the Filr Desktop Console:

- ♦ [Section 4.5.1, “Changing Your Filr Account Information,” on page 25](#)
- ♦ [Section 4.5.2, “Understanding and Viewing Your Data Quota,” on page 26](#)
- ♦ [Section 4.5.3, “Changing the Location on Your File System Where Filr Files Are Synchronized,” on page 26](#)
- ♦ [Section 4.5.4, “Removing Cache Files,” on page 27](#)
- ♦ [Section 4.5.5, “Preventing Application-Driven Downloads From Filling Up the Local Disk,” on page 27](#)
- ♦ [Section 4.5.6, “Understanding and Resolving Synchronization Issues,” on page 28](#)
- ♦ [Section 4.5.7, “Viewing Recent Activity,” on page 29](#)
- ♦ [Section 4.5.8, “Viewing System Alerts,” on page 29](#)

### 4.5.1 Changing Your Filr Account Information

When you first configure the Filr desktop application, you specify your account information and Filr server information. You can change the information at any time after the initial configuration:

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 In the Desktop Console, Click **Account**.
- 3 Specify the following information:  
**Username:** Specify the Filr user name that you use to log in to the Filr site.

**Password:** Specify the Filr password that you use to log in to the Filr site.

**Remember password:** Select this option to have the Filr desktop application remember your password. (This option can be disabled by your Filr administrator.)

**Server URL:** Specify the URL for the Filr site where you want to synchronize files to your computer. For example, <https://Filr.mycompany.com>.

4 Click **Apply**.

## 4.5.2 Understanding and Viewing Your Data Quota

Data quotas can be enabled by your Filr administrator in order to limit the amount of data that is stored on the Filr site.

If data quotas have been enabled on your Filr site, ensure that you understand what counts toward your data quotas, the different kinds of data quotas that exist, and how you can view the current data usage, so you can know when you are approaching the allotted data quota. If you meet your allotted quota, Filr enables you to purge files and attachments that you have previously deleted.

### Understanding Data Quotas

Data quotas limit the amount of data individual users can add to the Filr site. Files that are located in Net Folders (including your Home directory) do not count toward your data quota.

### Viewing Your Data Quota

Data quotas might or might not be in use on your Filr site. If you are unable to view your data quotas as described in this section, your Filr administrator has not yet restricted the amount of data that can be added to the Filr site.

You can view your data quota directly from the desktop application:

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 In the Desktop Console, Click **Account**.

Your data quota is displayed with the amount that you have currently used. The max file size is also displayed; this is the largest size of file that you are allowed to upload to the Filr site.

For more information, see “[Managing Your Data Quota](#)” in the *Filr 3.2: User Access Guide*.

## 4.5.3 Changing the Location on Your File System Where Filr Files Are Synchronized

By default, Filr files are synchronized to the `c:\Users\username\Filr` folder on your file system.


When you first configure the Filr desktop application, you can specify the installation location on your file system. You can change the location of the Filr folder at any time after initial configuration.

---

**IMPORTANT:** You should not synchronize files to a location on a network that can be accessed by multiple computers. If the Filr folder is on a network location that is accessed by multiple computers, synchronization issues can occur when Filr files accessed from either computer are out of sync with each other and with the Filr server.

---

To change the location of the Filr folder:


- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 In the Desktop Console, click **Storage**, then click **Browse** to browse to the new location on the file system where you want the Filr folder to reside.
- 3 Click **OK > Apply**.
- 4 Log out and relogin the computer for the changes to be effective.

## 4.5.4 Removing Cache Files

When an online file, which is not yet available offline, is accessed either by an application or by double-clicking, a copy of the file is cached locally.

The **Storage** tab in the Desktop Console specifies the default number of days that your Filr Administrator has set for the locally cached files to remain on your desktop after they are no longer being accessed or modified.


You can modify the number of days for which you want the locally cached files to remain on your desktop after they are no longer being accessed or modified only if your Filr Administrator has enabled you to do so. To modify the lifetime of the cached files, do the following:

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 In the Desktop Console, click **Storage**.
- 3 (Conditional) If your Filr administrator has enabled you to modify the lifetime of the cached files, select the **Remove cached files after \_ days** option and specify the modified number of days.

## 4.5.5 Preventing Application-Driven Downloads From Filling Up the Local Disk

Filr now lets your system administrator control application-driven downloads and prevent Filr from filling up local disks. For more information, see [Controlling File Downloads by the Filr Desktop Applications](#) in the [Filr 3.2: Maintenance Best Practices Guide](#).

To see the application-driven download restrictions that apply to your workstation, do the following:

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 Click **Applications** and then click **View applications**.

Based on the option that your Filr administrator has applied, one of the following is applicable:

- ♦ **No restrictions:** All applications are allowed to download files through Filr.
- ♦ **Allowed applications:** Lists the applications that your Filr administrator has allowed to download files through Filr.

When an application that is not allowed attempts to download files, you are notified that the application is blocked from downloading the files and a message is displayed in the **System Alerts** tab. You can choose to dismiss this alert. If the alert for an application already exists in the **System Alerts** tab and this application attempts to download files again, then no notification displays.

If you no longer want the alert to be displayed again for an application, select the **Do not show again for application name** option.

If you believe that another application should be allowed to download files through Filr, contact your Filr administrator.

- ♦ **Blocked Applications:** Lists the applications that are blocked from downloading files through Filr.

When an application that is blocked runs, you are notified that the system administrator has blocked the application from downloading the files. You can choose to dismiss this alert. If the alert for an application already exists in the **System Alerts** tab and this application attempts to run again, then no notification displays.

If you no longer want the alert to be displayed again for an application, select the **Do not show again for application name** option.

- ♦ **Allowed and Blocked applications:** Lists all the applications that your Filr administrator has allowed and blocked from downloading files.

The **Application** tab also displays your local **Allowed** and **Blocked** lists that lets you manage unidentified applications that have neither been allowed or blocked by your Filr administrator. When an unidentified application attempts to download files through Filr, it is added to your local blocked list that you control and a notification appears. An alert message also displays in the **System Alerts** tab with an option to allow the application to download. If you click **Allow**, the application is moved from your local Blocked list to your local **Allowed** list in the **Application** tab.

You can also move applications between the local **Allowed** and **Blocked** lists by using the right (>>) and left (<<) buttons.


## 4.5.6 Understanding and Resolving Synchronization Issues


Most synchronization issues can be resolved through the Pending Actions section of the Filr Console. If issues require further investigation, you can check the desktop logs.


- ♦ [“Understanding Pending Actions” on page 28](#)
- ♦ [“Understanding Document Conflicts” on page 29](#)

### Understanding Pending Actions


You might encounter any of the following synchronization issues, indicated by one of the following icons:


: There is an upload error.

: There is an upload warning.

: There is a download error.

: There is a download warning.

: There are upload and download errors.

: There are upload and download warnings.

: The client has not yet attempted to upload or download the file.

If you are unsure why a document is not downloading or uploading, view the recent activity, as described in [“Viewing Recent Activity” on page 29](#).

## Understanding Document Conflicts

If a document is edited at the same time from various locations, only the first file to be saved and closed is saved with the original file name and uploaded to Filr. Other versions of the file are saved under different file names and uploaded to Filr. Only the original file maintains any file comments and share information.

For example, suppose that User A and User B begin editing `file1.doc` at the same time on different workstations. User A saves his changes and closes the file. The file is saved to Filr with User A's changes and with the original file name (`file1.doc`). User B then saves her changes and closes the file. User B's file is renamed to `file1 (User B's conflicting copy date).doc` and uploaded to Filr. User B's desktop then downloads User A's version of `file1.doc`, and User B is notified that her file has been renamed.

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**IMPORTANT:** A renamed file can be uploaded only if the user who created it has Contributor rights to the folder where the file originated. For example, if a file was shared with User B, and User B has only Editor rights to the file (not Contributor rights), the file cannot be uploaded to Filr after it is renamed.

---

### 4.5.7 Viewing Recent Activity

You can view activity that has recently taken place in the Filr desktop application. For example, you can see the date and time that Filr folders were synchronized, which files were modified, and information about any synchronization issues you might be experiencing.

To view recent activity:


- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 Click **Recent Activity**.

### 4.5.8 Viewing System Alerts

The Filr desktop application might need to make you aware of various alerts, such as new software updates, expired passwords, server downtime, and so forth.

When system alerts are available, this information icon  flashes over the **Filr** icon .

To view system alerts:

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**.
- 2 Click **System Alerts**.

## 4.6 Customizing the Branding of the Desktop Application

Filr Administrator can now modify the appearance of your desktop application to match the look and feel of your corporate identity. The branding changes are not effective on your desktop unless you log out and log in the desktop application again. When you log into the desktop application again, a message that your Filr administrator has customized the user interface is displayed. Click **OK** to automatically relaunch the customized desktop application.

## 4.7 Balloon Notifications Might Not Display

By default, Filr displays balloon notifications on your desktop when certain events occur, such as when the Filr application is launched, a file or folder is shared, file or folder is made online or offline, a blacklisted application is opened, or a desktop client upgrade is available.

However, beginning with Filr 3.1, Filr administrators can enable or disable balloon notifications on users' desktop.

If your Filr administrator has disabled balloon notifications, you can use the Filr Desktop Console to view the following information about the notifications and take appropriate action.

- ♦ **Recent Activity:** Displays recent activities in the desktop application, such as file or folder operations.
- ♦ **System Alerts:** Displays various alerts such as new software updates, expired passwords, server downtime.

---

# 5 Working with Filr Files Directly From Microsoft Office

Filr enables you to work with files that are on a Filr server directly from a Microsoft Office 2013 and 2016 application such as Word, Excel, or PowerPoint provided the Filr Desktop Application is installed on the computer.

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

---

## IMPORTANT

- You must have a valid Microsoft Office license and must be logged in to your Microsoft account.
- In the Microsoft Office application, you must add Filr as a storage service.
- To ensure that the Filr image displays in the Microsoft Office **Save-As** option, the Filr server must use a valid SSL certificate that is signed by a well-known certificate authority (CA). The Filr image does not display if self-signed certificates are used.

- 
- [Section 5.1, “Adding Filr as a Storage Service,” on page 31](#)
  - [Section 5.2, “Creating and Saving a New File in the Filr Server,” on page 31](#)
  - [Section 5.3, “Opening a File From the Filr Server,” on page 32](#)
  - [Section 5.4, “Editing and Saving a File to the Filr Server,” on page 32](#)

## 5.1 Adding Filr as a Storage Service

To work with Filr Files directly from Microsoft office, you must add Filr as a storage service. For help on adding the service, see Microsoft Documentation.

Consider the following when you add Filr as a storage service in the Microsoft Office application:

- Ensure that you are logged into the Filr Desktop Application.
- If a Microsoft Office application remains open during the installation of the Filr Desktop Application, you must close the application and then reopen it to add Filr as a storage service.

When you uninstall the Filr Desktop Application, the Filr service that you added in the Microsoft Office application is not automatically removed from the Office application. We recommend that you manually remove the Filr service from the Office application if you no longer intend to work with Filr files from the Office application.

## 5.2 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 In Microsoft Office, create a new file.
- 2 Click **Save As** and then double-click the **Filr** tab.

- 3 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`.
- 4 Browse to the location where you want to save the file and click **Save**.

## 5.3 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 In Microsoft Office, click **File > Open**.
- 2 Double-click the **Filr** tab.
- 3 Browse to the location from where you want to open a file, select the file, and click **Open**.

## 5.4 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 In Microsoft Office, click **File > Open**.
- 2 Double-click the **Filr** tab.
- 3 Browse to the location from where you want to open a file, select the file, and click **Open**.
- 4 Edit the file and save it.



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# 6 Troubleshooting

The following sections provide troubleshooting information about the scenarios that you might encounter when using the Filr desktop application:

- ♦ [Section 6.1, “Out of Sync Files,” on page 33](#)
- ♦ [Section 6.2, “Log Files,” on page 33](#)
- ♦ [Section 6.3, “Upgrade Issues,” on page 33](#)

## 6.1 Out of Sync Files

The **Pending Changes** view in the Filr console sometimes contains useful information about sync actions that did not complete successfully.

- 1 Right-click the **Filr** icon  in the notification area, then click **Open Filr console**
- 2 From the pending changes view, you can retry sync actions, or undo changes to the Filr workspace.

With Filr 2.0 and later, you can also use the right-click menu to undo the changes that cannot be synchronized with the server:

- 1 Right-click the file or the folder.
- 2 Click **More filr options > Undo local changes**.

## 6.2 Log Files

The log files are located in `C:\Users\username\AppData\Local\Novell\Filr`.

The `AppData` folder is hidden by default. To access the folder, type the following in the Windows Explorer address bar:

```
%LOCALAPPDATA%\Novell\Filr
```

## 6.3 Upgrade Issues

Review the following to troubleshoot issues faced when you upgrade a Windows Desktop Application:

- ♦ [Section 6.3.1, “Older Version of Filr Icon Displayed on the Windows Desktop Application Post Upgrading the Desktop Application,” on page 34](#)
- ♦ [Section 6.3.2, “Windows Desktop Might Hang When Upgrading the Desktop Application,” on page 34](#)

### 6.3.1 Older Version of Filr Icon Displayed on the Windows Desktop Application Post Upgrading the Desktop Application

When you upgrade the Filr Desktop Application on a Windows desktop, the Filr icon displayed within the Favorites might not get updated to the new Micro Focus Filr icon.

**Workaround:** Perform the following steps:

1. Delete the file `%localappdata%\IconCache.db`  
The `IconCache.db` file is hidden by default.
2. Restart the Windows Explorer.

### 6.3.2 Windows Desktop Might Hang When Upgrading the Desktop Application

When you upgrade the Filr Desktop Application on a Windows desktop, the client installer might hang.

**Workaround:** Perform the following steps:

1. Manually kill the client installation process:
  - a. Launch the Windows Task Manager.
  - b. Right-click the `msisexec.exe*32` process and then click **End Process Tree**.
2. Restart the computer.
3. Launch the upgrade process again and follow the system prompts to complete the upgrade.