



**eFiler 365**

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## Introduction

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### Welcome

Welcome to eFiler365 specifically engineered for Outlook web and New Outlook\*

The new version of Outlook brings a completely new way to work with emails. The key benefits are a unified interface and single base across platforms. New Outlook brings new features and concepts to the forefront. At the same time the Classic Outlook desktop client remains fully supported and updated. It is not possible to give customers a definitive answer on which solution suits them best but we are happy to discuss the merits of each over a Teams call.

#### **Benefits and features of the new version of Outlook and eFiler365 -**

- Consistent across all platforms (works on Classic Outlook / Outlook web / New Outlook and Outlook mobile)
- Access and processing is now centralised with a lightweight web client for the desktop.
- Our eFiler365 hub centralises configuration and license assignment.
- Saves emails in .eml format (eFiler+ for Outlook Classic supports both filing and searching in .eml and .msg)
- Allows for filing emails to Autodesk, Google Drive, SharePoint, Local and Network folders
- Enables filing emails at all hours (where the eFiler Sync UI is installed as a service on a server\*)

Items to be aware of with the current functionality of New Outlook -

There is no way to prompt to save sent messages or to drag and drop emails for filing (these are features of eFiler and eFiler+ for classic Outlook\*)

There is a limitation in the number of emails you can select at once (in theory 100 but sometimes less)

\*Classic Outlook will continue to be supported by Microsoft until 2029. Please refer to <https://efiler.co.uk> for further information on our fully featured offering for the classic Outlook desktop client.

## Getting Started

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### System requirements

eFiler365 requires a Microsoft365 account.

eFiler365 is designed to work in any modern browser with web access to Outlook.com, in the New Outlook desktop client and within Outlook on mobile devices\*

eFiler Sync UI is available for Windows operating systems only at this time.

\*Whilst eFiler365 will work on mobile devices it is currently only available by request.

Minimum requirements

Windows 7 with Microsoft Edge or Chrome browser installed

Desktop installations of Office 2016 or higher

eFiler365 comprises of the following components

A user account on [eFiler365 hub](#)

The [web addin manifest](#) which should be activated (the first installation should be undertaken by an administrator of the Microsoft tenant)

[eFiler Sync UI application](#) (only required where filing emails to local/network folders is required - running in Standalone or in Server mode\*)

\*eFiler.Sync Service (added when eFiler Sync is installed in Server mode)

### Download links

Please request your download links by emailing [support@efiler.co.uk](mailto:support@efiler.co.uk)

### Getting help

Please review additional resources available here - <https://efiler.co.uk/efiler-365-support/>

If you need additional help please contact us at [support@efiler.co.uk](mailto:support@efiler.co.uk)

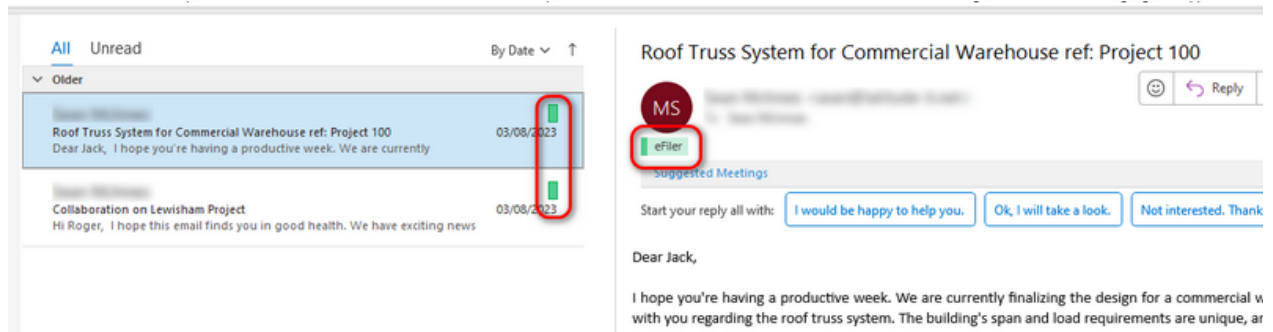
## Quickstart Guide

1. Connect the application to your Microsoft account by searching for eFiler365 in the Microsoft App Store - <https://aka.ms/olksideload> (Alternative installation [here](#))
2. Refresh your browser whilst on Outlook.com
3. Select any email
4. In the message preview select the 4 squares to load the addin, select eFiler365 and load the side bar
5. Select sign in
6. Allow the popup and select register
7. Provide account details or scroll to the bottom and sign in using your Microsoft account
8. Sign in to eFiler365
9. In the sidebar you will be asked to add an integration and a destination. Follow the link to add an integration
10. In the eFiler365 hub complete the steps to add an integration and then add a destination
11. If you are planning to file to local/network folders install the [eFiler Sync](#) UI, sign in to your account and add a local folder
12. Refresh the sidebar (close and reopen) or refresh your Outlook view.
13. Select your first email to file
14. In the message preview call the sidebar menu and browse for your first location to file an email to.

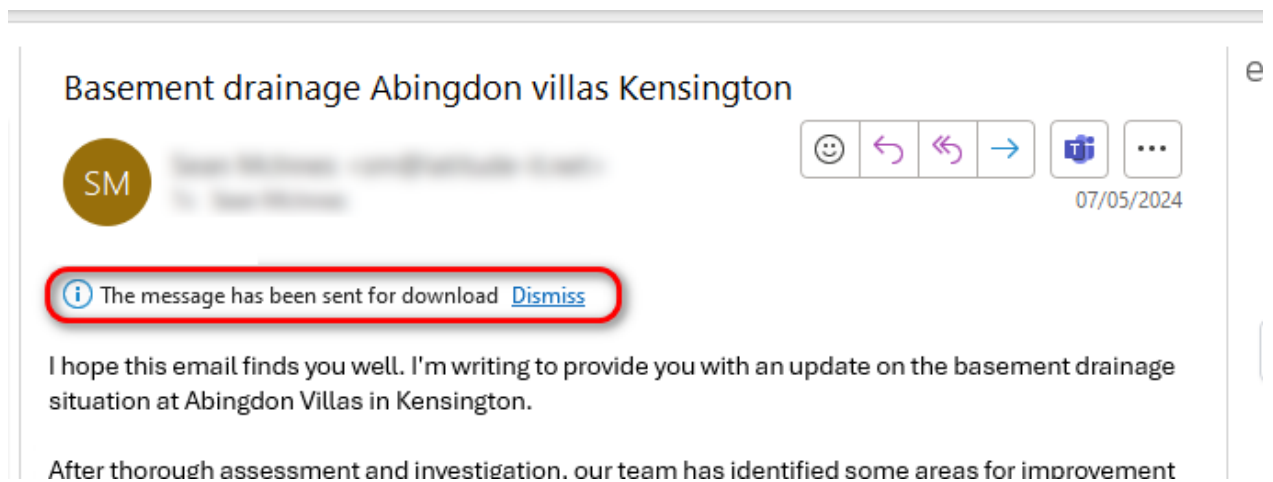
Please contact us if you need assistance. More detailed instructions and information follows below.

## What to expect when filing

When you file an email with eFiler365 the email is queued for processing.



Each email is marked as filed with the eFiler Category mark in Outlook.



You will also see a temporary message indicating that the file has been sent for download.

The email may be [moved](#) or [deleted](#) to help you keep track of which emails are filed and which are yet to be selected for filing. See the settings available under [User Options](#).

Note that categories are not available on Outlook mobile – we therefore recommend you enable the feature to [move filed emails](#) to a folder called 'Filed by eFiler'. This will then provide a consistent method of filing from desktop / laptop / tablet / mobile.

## Installing eFiler365

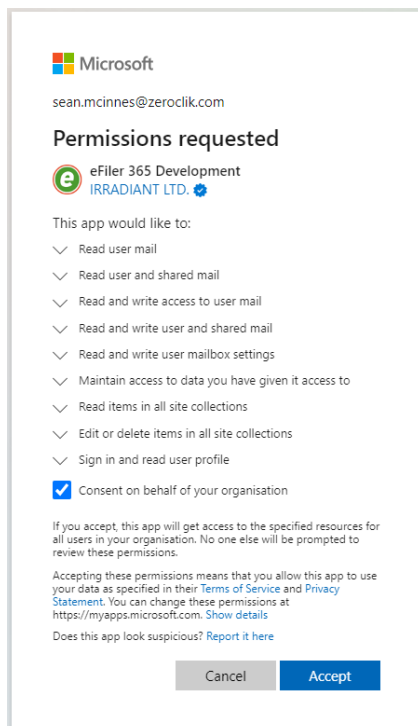
### Install from the App store

You can install eFiler365 directly from the Microsoft App Store. Open Outlook using a web browser or desktop client and select All Apps and filter for eFiler. eFiler365 can be added using a browser and logging in to your Office 365 account from this link - <https://aka.ms/olksideload>

### Install using a manifest file

You can also install eFiler365 by requesting a manifest file from support -

- Request a copy of the eFiler365 manifest file from support@efiler.co.uk (make sure to save the file with a .xml file extension)
- Login to Outlook.com
- Paste the following into the browser address bar and hit enter - <https://aka.ms/olksideload>
- Select 'My add-ins' on the left side menu
- Select '+ Add a custom add-in'
- Select 'add from file'
- Locate and select the manifest file you saved earlier in step 1
- Provide consent for eFiler365 to process your emails on your behalf (Tenant administrators can read [more here](#))



The first user to connect to Microsoft will need to be a global administrator for your Microsoft Tenant and accept the required permissions to process your emails as shown above.

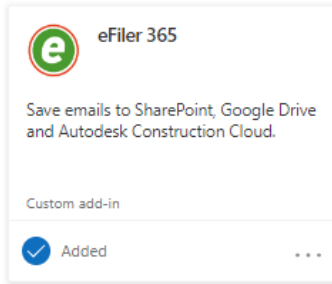
Important Note - We do not save your data to disk, we simply process it and save it to your chosen storage location. If you are unable to grant the required permissions we will not be able to process your emails and we would recommend you take a look at eFiler+ for Classic Outlook.



### Custom Addins

You can install add-ins from a file or from a URL. [+ Add a custom add-in](#) ▼

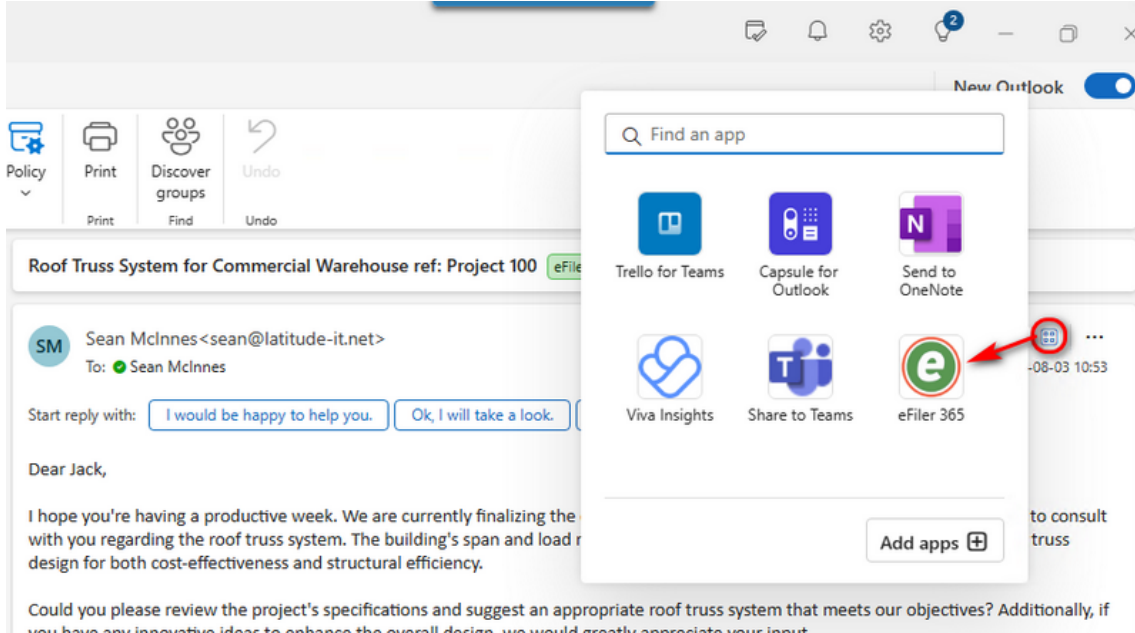
Once complete you should see the addin listed under Custom addins



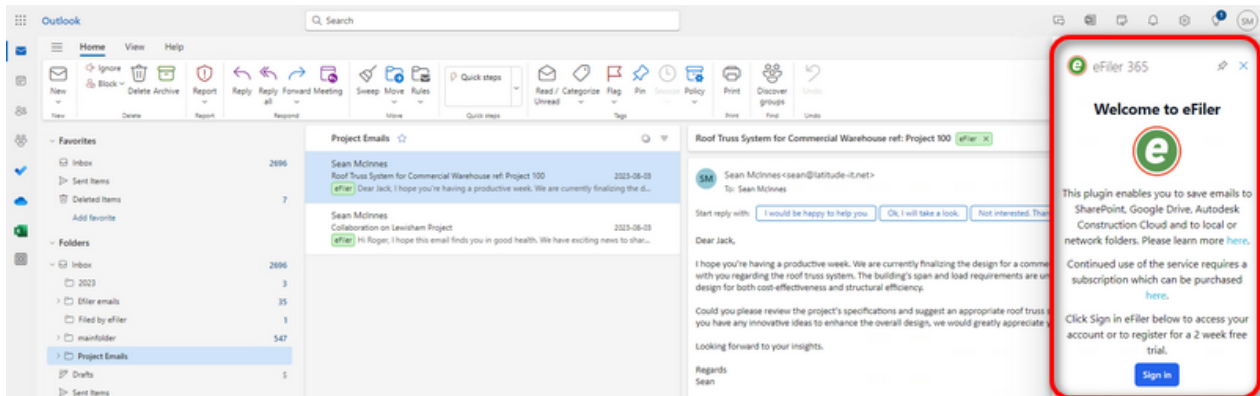
## Call the web application from Outlook

Once the application is installed you can locate the addin & load the sidebar by following the steps -

### Outlook web & New Outlook desktop client -

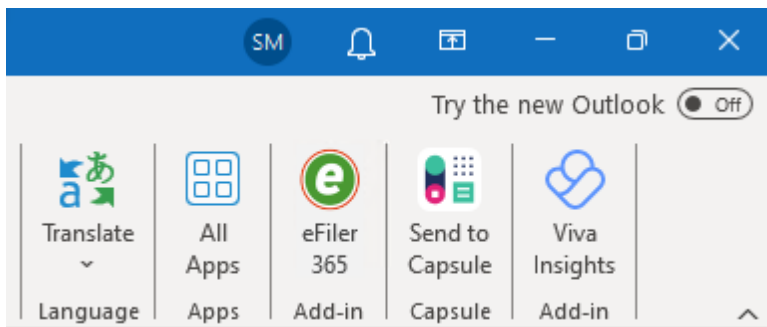


Select any email in Outlook and select the app icon to load the application



The addin will load in the sidebar as shown above.

### Classic Outlook -



Once installed you will see the application listed on the Outlook ribbon menu.

## Filing Emails

### File an email manually

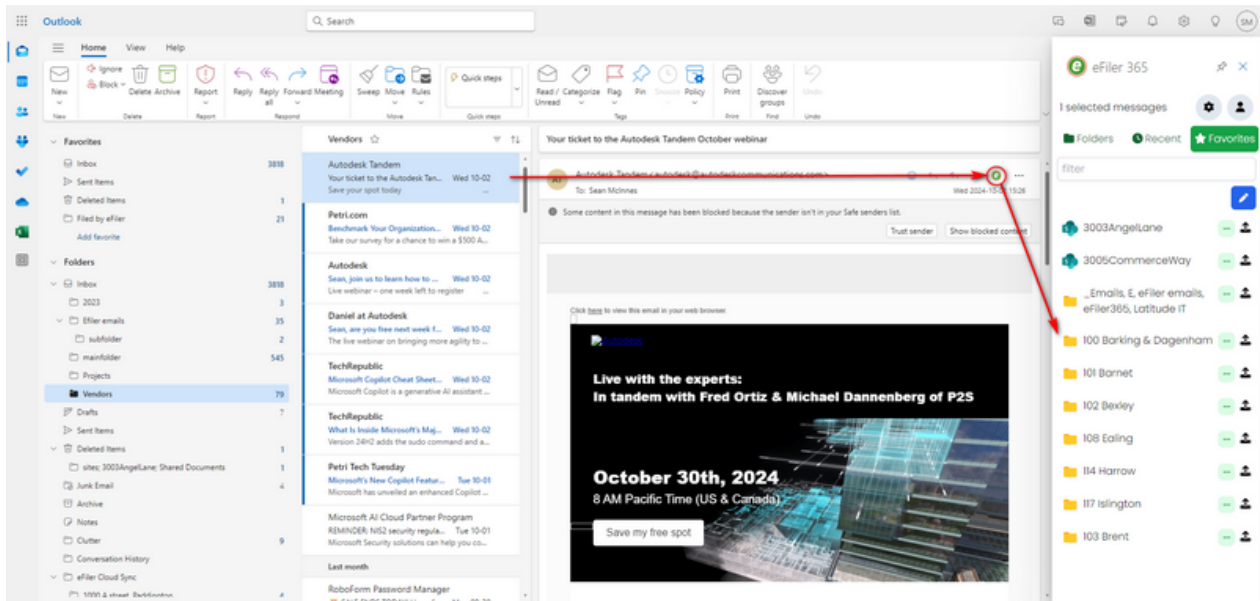
To file one or more emails manually -

Select the email to be filed

In the preview pane select the eFiler application to display the side bar (if it is not already loaded)

Double click on a location to file the email to

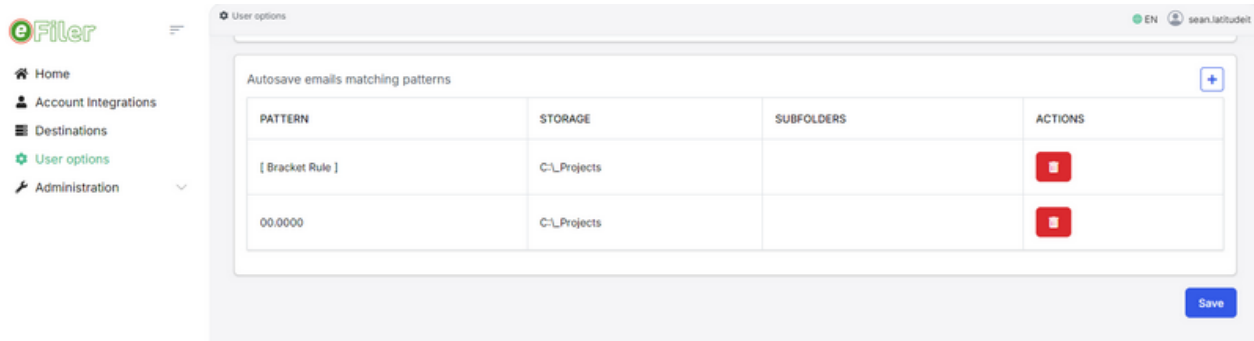
The email will be confirmed as filed when it is marked with the eFiler category mark.



## File emails automatically

eFiler365 introduces the ability to file emails automatically when a rule has been configured and the email (sent, received or moved) meets certain criteria.

To configure a rule visit User Options in the eFiler365 hub



Once an email has been filed by eFiler365 and has the applied category no further processing will occur.

Add a Bracket Rule to match to any folder containing the text found between [ ] in the subject line of any email.

Add a pattern rule to specify a pattern for eFiler365 to find. Some examples are offered below -

### Example 1

00.0000 will find a match to any folder that contains 2 numbers followed by a period mark and another 4 numbers.

An email subject "12.3456 Meeting minutes" would file to a folder called "12.3456 Newham Way" if such a folder was found

### Example 2

AA.0000 will find a match to any folder that contains 2 letters followed by a period mark and another 4 numbers.

An email subject "NW.3456 Meeting minutes" would file to a folder called "NW.3456 Newham Way" if such a folder was found

Each rule has the option to specify a subfolder path. When entered the email will be placed in a consistent subfolder path relative to the folder that was matched by the rule. For example if a subfolder path "Documents\Emails" was specified on the rule an email may be filed to "r:\NW.3456 Newham Way\Documents\Emails"

Rules are currently only available for filing to local or network folders when using the [eFiler Sync UI](#) (in standalone or as a service)

## Folder Name Rules

Folder name rules allow you to create a set of similar folders in Outlook. Drag and drop emails into these folders to automatically file emails into folders with the identical name on folders indexed by eFiler Sync.

### Rule type

### Storage

### Select folders

Subfolders

Note - Folder structure within Outlook is irrelevant. This allows you group folders or reorganise folders within Outlook without causing any issues for eFiler.

## eFiler365 Hub

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The [eFiler365 hub](#) is where everything happens. Register to create an account where you can [connect to Cloud providers](#) and [add destinations](#) for filing emails. Use your eFiler365 hub account to [manage your settings](#).


Use of eFiler365 requires each user to register for an account. To initiate a 14 day free trial of eFiler365 register here - <https://api.hub.efiler.co.uk/Account/Register>

If your company has already purchased eFiler365 and your administrator has confirmed your account details you can proceed to login using your defined username/password or your Microsoft account.


Company administrators can add and manage existing users in the eFiler365 hub.

## Register on eFiler365

Register as a new user here - <https://api.hub.efiler.co.uk/Account/Register> or follow the link to sign in / register once the [web addin](#) is loaded.



### Welcome to eFiler



This plugin enables you to save emails to SharePoint, Google Drive, Autodesk Construction Cloud and to local or network folders. Please learn more [here](#).

Continued use of the service requires a subscription which can be purchased [here](#).

Click Sign in eFiler below to access your account or to register for a 2 week free trial.

[Sign in](#)

### Register

Already registered? [Login](#)

Username \*

Email address \*

Password \*

[Register](#)

Or register with

[Microsoft](#)

Select Microsoft to register using your Microsoft account (no separate password required)  
By default you will be assigned a trial licence unless you have already been authorised under an active company account subscription.

## Login to eFiler365 hub

If you have already installed the addin, select Sign In to Sign in or Register a new Account

### Login

Are you a new user? [Register](#)

Username or email address

Password

Remember me

[Forgot password?](#)

Or login with:

You can always access your eFiler365 hub account here - <https://api.hub.efiler.co.uk/Account/Login>

eFiler 365



1 selected messages



filter

Folders

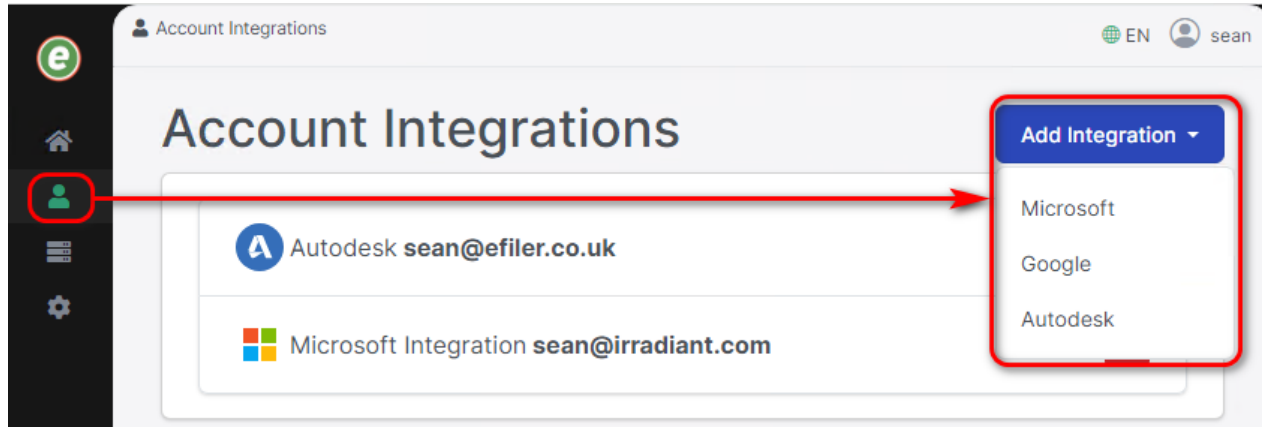
- Open manager
- Logout

There is also a link to your account from the web addin profile button



## Adding Integrations

Using any browser [login](#) to manage your eFiler365 hub account -

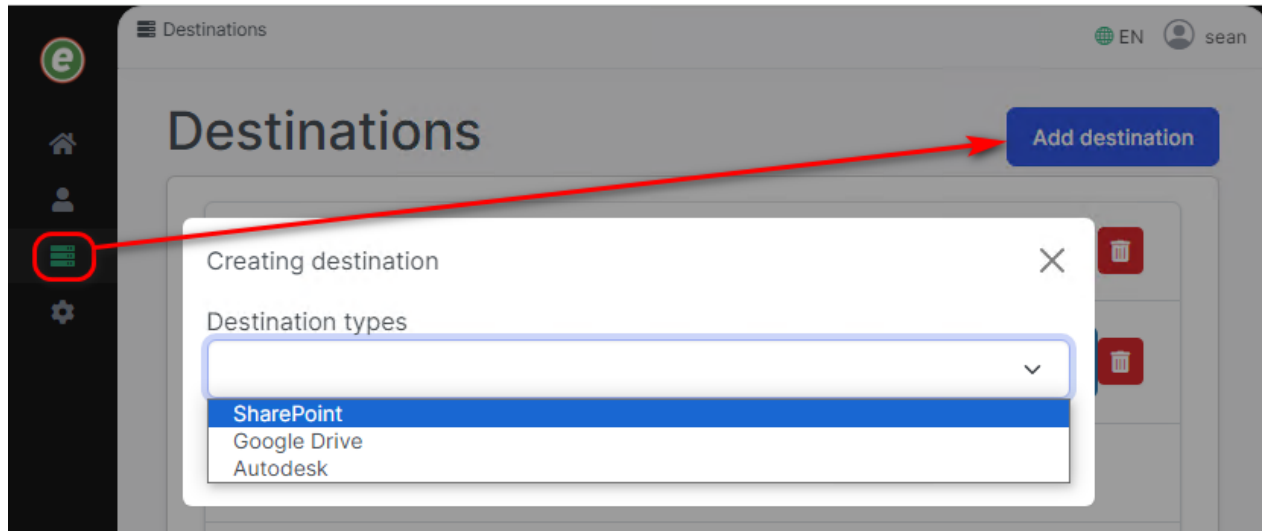


Once logged in to the eFiler365 hub, navigate to Account integrations and select 'Add integration' to make connections to your relevant cloud accounts.

Important - only one eFiler365 account can be used to connect to a single external cloud account. If a connection is already established under a different user account name you will be notified and unable to connect the cloud account to your account. Please contact us if you are not aware of any similar connection under a different eFiler365 hub account.

## Add Cloud Destinations

Once integrations have been added upi will be able to continue to add filing destinations for eFiler365. Cloud destinations are added directly in the eFiler365 hub, while local/network folder locations are added from the eFiler Sync UI - please read more here

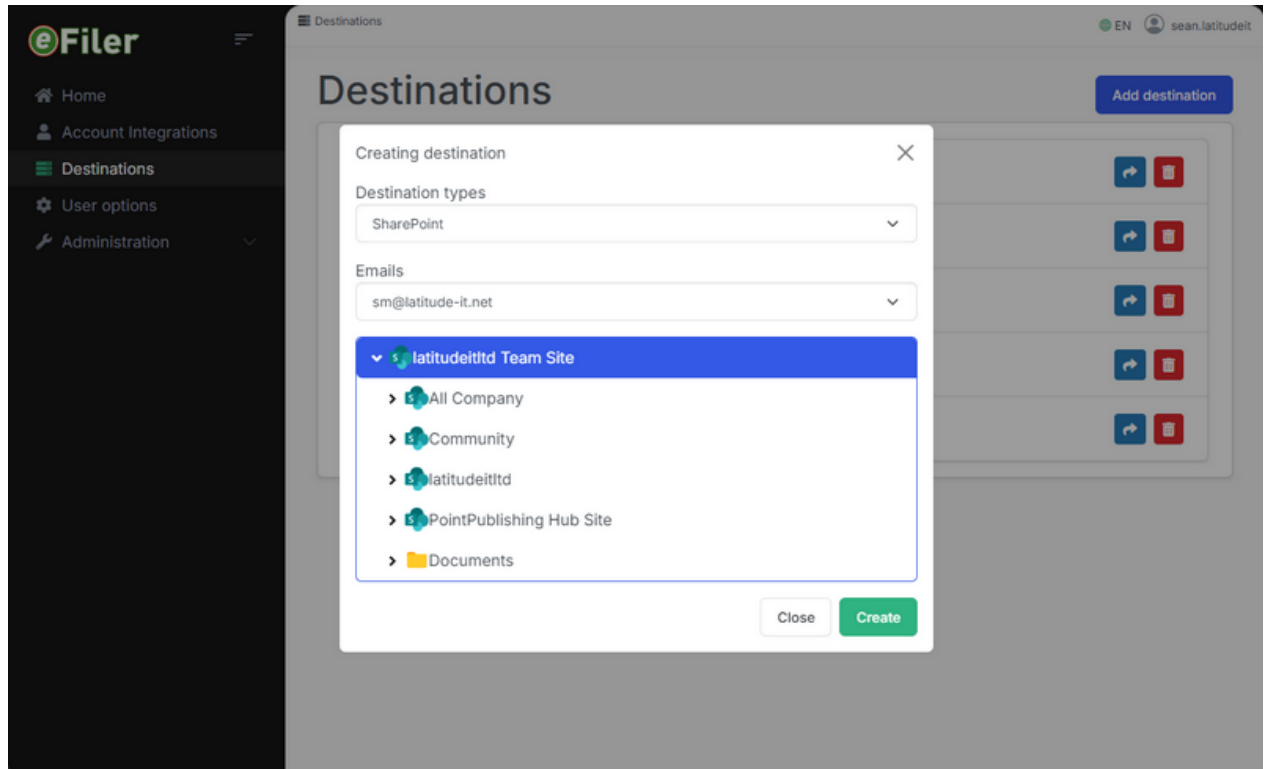


Note - you cannot add a cloud location if you have not previously authorised the connection under Account Integrations.

## Connect to SharePoint filing locations

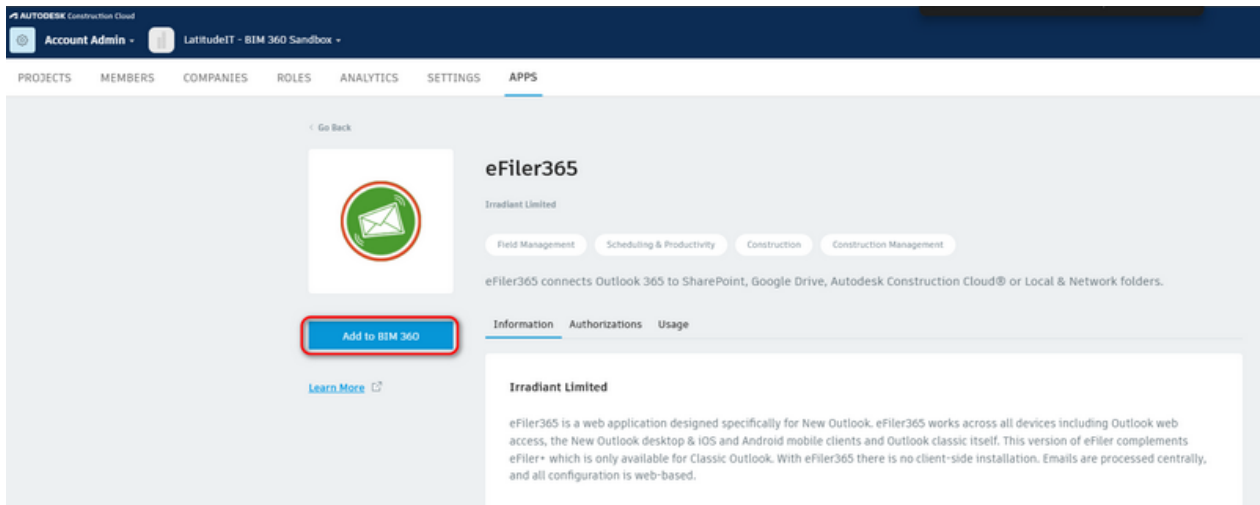
To connect SharePoint as a destination path for filing emails you must first create a connection to Microsoft under add integrations - if you have not already done this please [add an integration](#) first.

Once you have connected your eFiler365 hub account to Microsoft365 you can proceed to destinations to add a SharePoint location. You can add the root location or a sub site.



## Connect to Autodesk filing locations

The company administrator for Autodesk must visit the [Autodesk App store](#) and 'Add' the application.



When asked you must authorize the application



### eFiler365 would like to have access to:

#### BIM 360 document management

Read and write access to Document Management, including access to folders, documents, models, and issues.

Autodesk does not endorse or certify any Apps made available on the Autodesk BIM 360 App store. Autodesk will not be responsible for any information that you share with such Apps or the performance or security of such Apps.

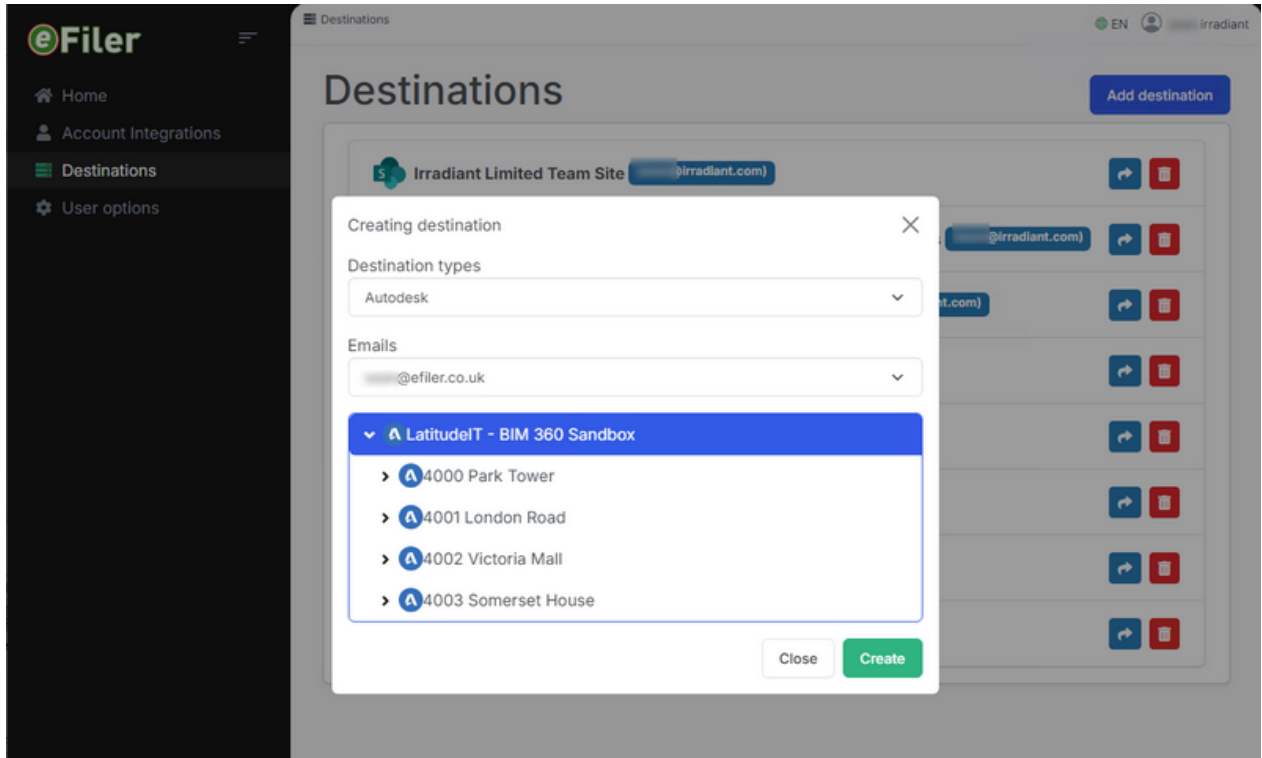
Cancel

Authorize

Once this is complete any use in the organisation can proceed to available Autodesk locations.

To connect Autodesk Docs as a destination path for filing emails you must first create a connection to Autodesk under add integrations - if you have not already done this please [add an integration](#) first. You will also require a connection to Microsoft under integrations.

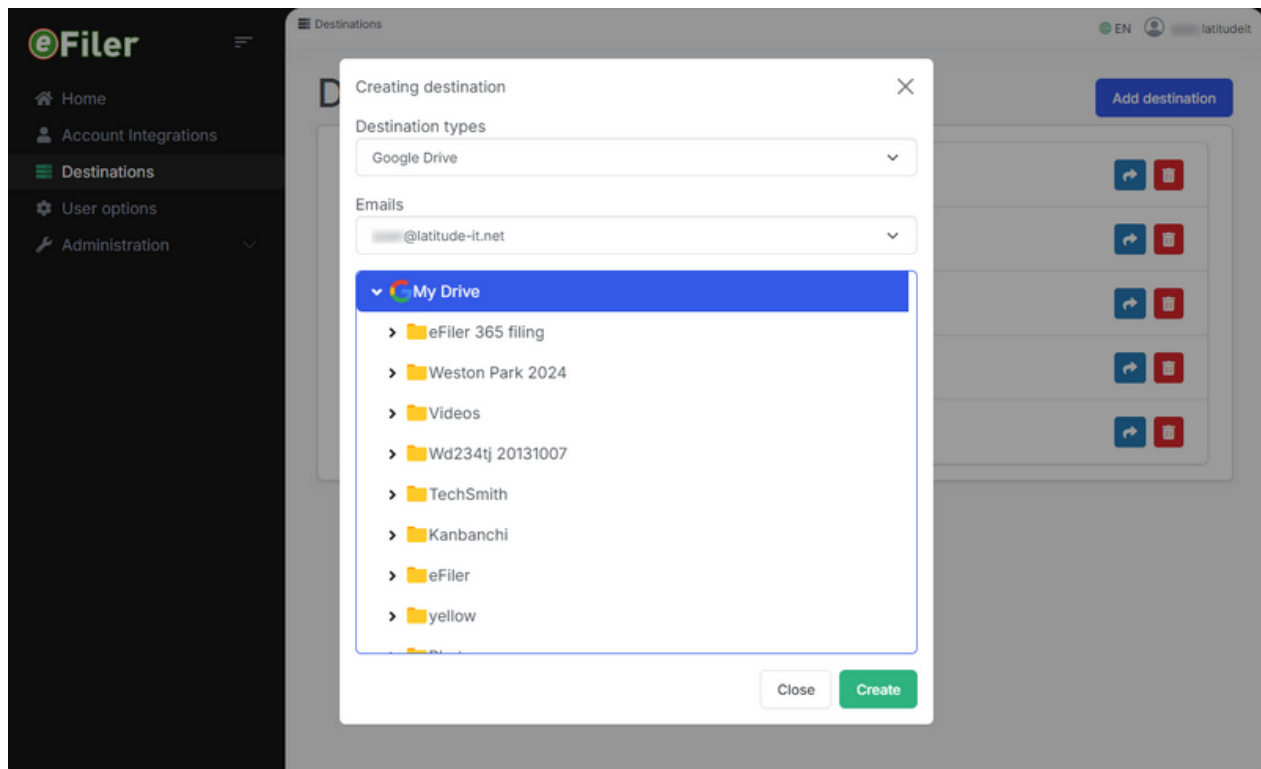
Once you have connected your eFiler365 hub account to Autodesk you can proceed to destinations to add a SharePoint location. You can add the root location or a sub site.



## Connect to Google Drive filing locations

To connect Google Drive as a destination path for filing emails you must first create a connection to Google under add integrations - if you have not already done this please [add an integration](#) first. You will also require a connection to Microsoft under integrations.

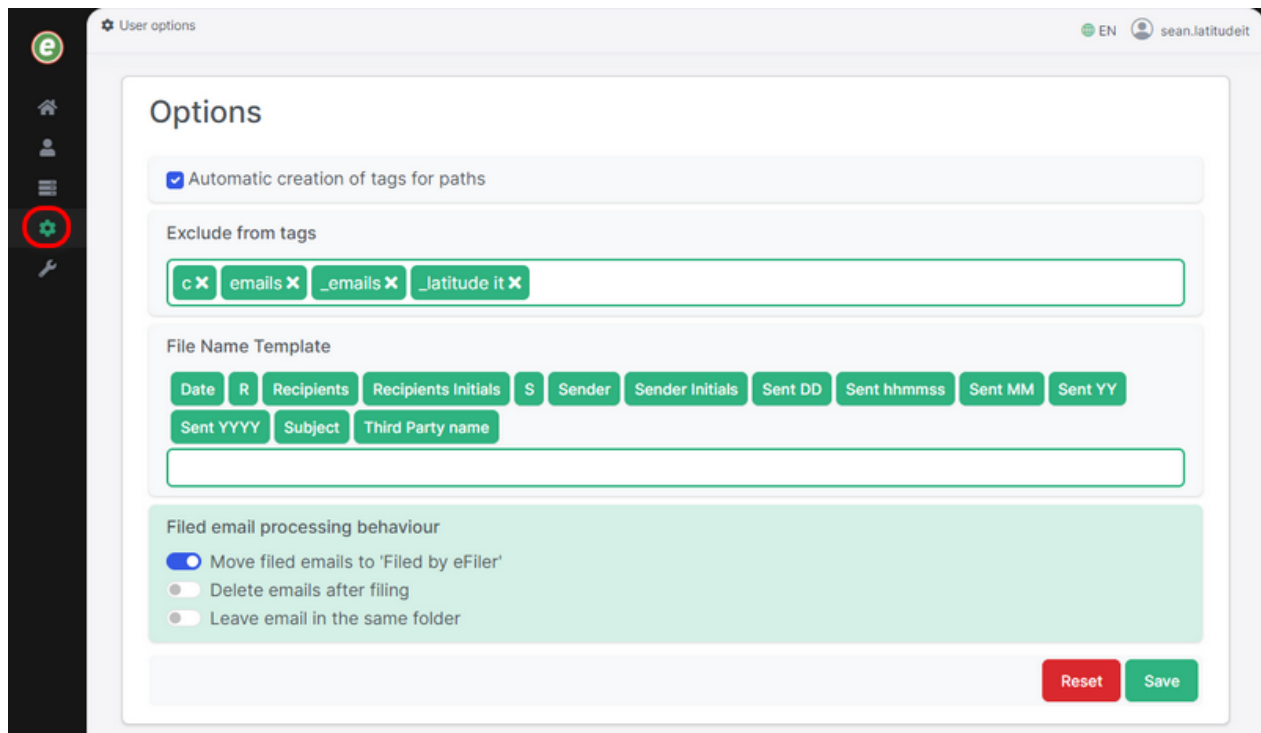
Once you have connected your eFiler365 hub account to your Google account you can proceed to destinations to add a Google Drive location. You can add the root location or a sub folder.



## Add Local Network locations

To add local/network locations as filing destinations requires the installation of the eFiler Sync UI application. Please visit the section on [eFiler Sync](#)

## User Options

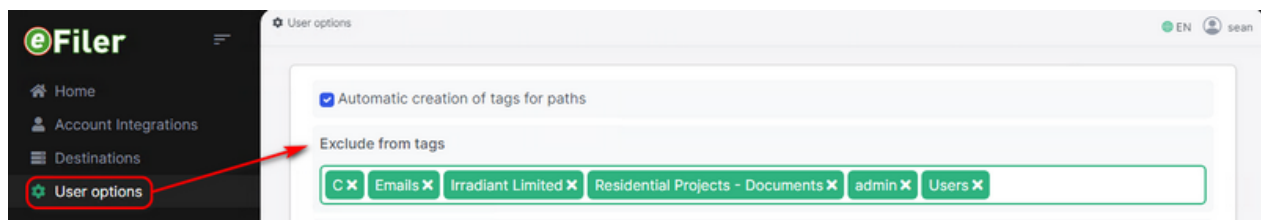


User settings are controlled and managed in the [eFiler365 user hub](#).

User settings can be managed individually or by company policy. If you are unable to adjust a user setting please consult your system administrator to review any required changes to the [policy settings](#).

## Tag management

Find this setting under [User Options](#) in your [eFiler365 hub account](#)



Too many tags can leave the user interface cluttered with unnecessary repetitive information. Use the option to exclude tags which are repetitive and aim to leave behind a clean location reference that is meaningful to users.

To add a new exclusion type a new word into the field. Complete the entry by hitting enter (it will turn green as above). Click to save settings to ensure the changes are recorded.

Entries are not case sensitive so 'emails' would exclude 'emails' and 'Emails'

If you modify or add exclude filters you must allow some time for changes to apply and restart Outlook / reload the addin for the changes to take affect

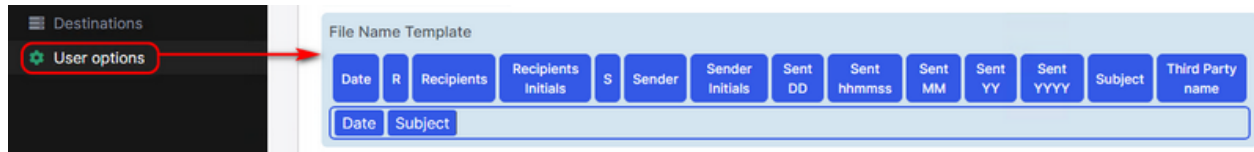
Existing locations will not be updated, exclusions apply to newly added locations only

It may be beneficial to apply this as a policy.

## File Name Template

Find this setting under [User Options](#) in your [eFiler365 hub account](#)\*

The default file name template is YYYYMMDD hhmmss Subject



If you would like to change this use any combination of the preset values, spaces and other characters as required

To add a preset value click on it

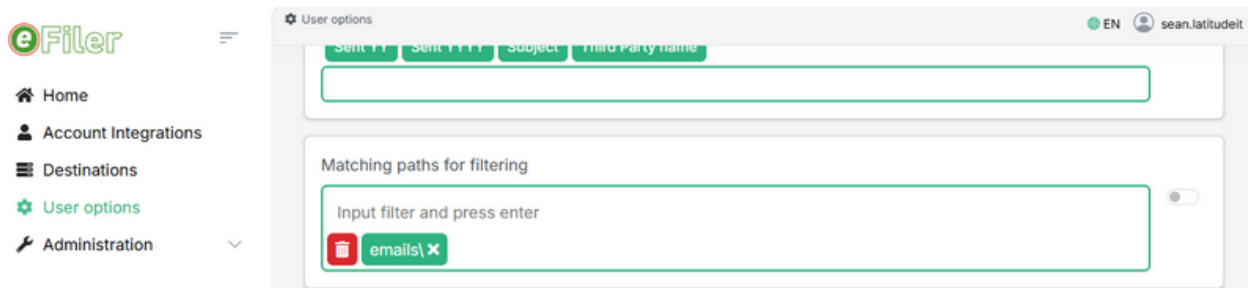
To remove a preset value click in the form area and use the backspace to remove the value  
Don't forget to add spaces between values as appropriate – and **to save the changes** once complete!

We always recommend starting your file name template with the date and time to ensure each email has a unique file name and is not duplicated.

\*In most corporate environments it is beneficial to apply this as a [Policy setting](#) – if you are unable to make changes, contact your company administrator to review any changes.

## Matching paths for filtering

Use this option to guide your Autopilot results to specific folders. Autopilot results are provided from the indexed results saved by eFiler Sync. You can enter a specific filter here to ensure that you are always offered an appropriate folder for filing emails to.



Examples –

emails\ will show all folder paths that end in the word emails

\emails will show all folder paths that start in the word emails

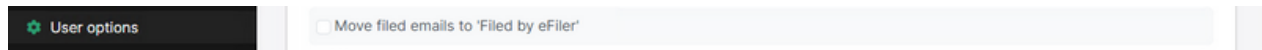
emails will show all folder paths that contain the word emails

\emails\ will show all folder paths that are called emails exactly

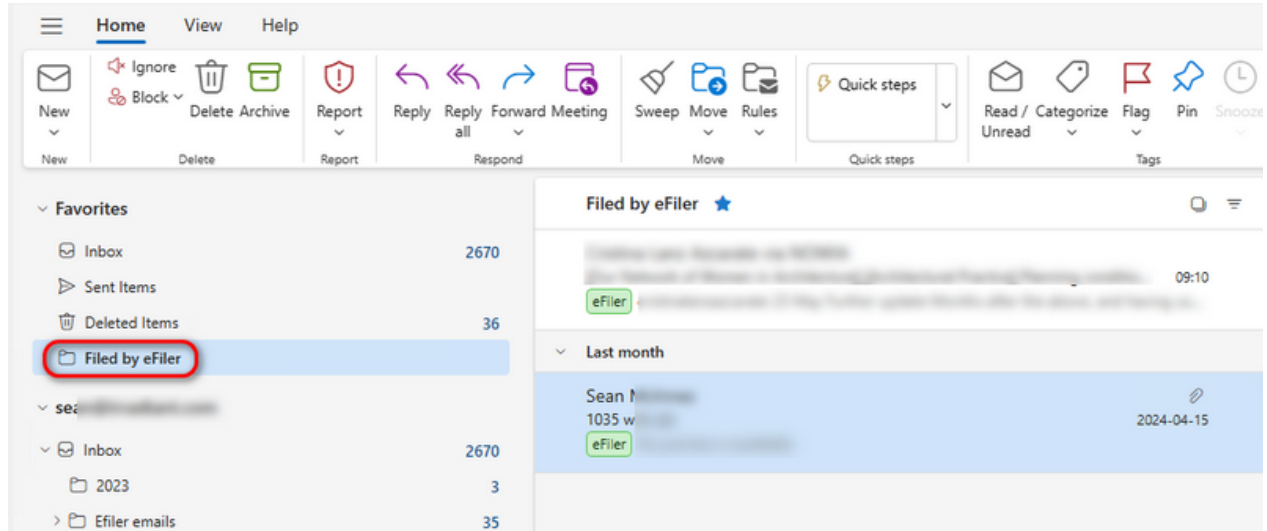


## Move filed emails

Find this setting under [User Options](#) in your [eFiler365 hub account](#)



Select this option to move filed emails into a subfolder within Outlook called 'Filed by eFiler'

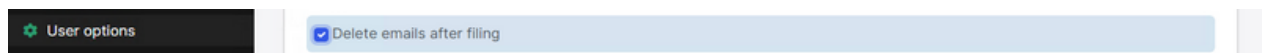


You may wish to favorite this location to make it easily accessible if you have a long list of Outlook sub folders.

**Note** - you can only select either move filed emails or [delete filed emails](#)

## Delete filed emails

Find this setting under [User Options](#) in your [eFiler365 hub account](#)



Select the option to Delete emails after filing if you want filed emails to be sent to Outlook deleted items once filed.

**Note** - you can only select either [move filed emails](#) or delete filed emails

## Autosave emails based on a pattern

Setup rules to autosave emails from your Microsoft mailbox to folders using eFiler365+. Navigate to User Options in the [eFiler365 user hub](#).

Click on the + icon

In the field on the left enter a pattern to match. Use 0's for numbers and A's for letters.

Example to autosave emails where a 5 digit number is found in the subject line enter 00000

In the field to the right select a destination folder (this must have been previously created - see [cloud](#) and [local locations](#))

Finally click on save (above where you are creating the rule), and then save all settings.

Autosaving saves matching emails to the destination specified.

The screenshot shows a web interface titled "Autosave emails matching patterns". At the top, there is a green "Save" button. Below it is a form with two input fields separated by a right-pointing arrow. The first row shows the pattern "00000" and the destination "C:\Latitude IT\Emails", with a red delete button to the right. The second row shows the pattern "000000" and the destination "eFiler", also with a red delete button. At the bottom right of the interface, there are "Reset" and "Save" buttons.

### Notes

- Emails will be processed as they are sent or received (even when the user is offline)
- This feature is available to eFiler365+ subscribers

## Autosave emails using [ ]

This feature allows users to tag emails for filing by including a reference within [ ] when drafting an email subject. When enabled eFiler365 will attempt to match what is found between [ ] to a folder name in the destination folders.

**Rule type**

Bracket Rule

**Storage**

R:\

**Select Match type**

Partial match

Exact match

Subfolders

Emails

Company rule

Add Close

#### Notes

- This feature is available to efiler365+ subscribers

### Folder Filing

The purpose of folder filing is to allow a user to create template folders within Outlook where you can drag and drop emails for filing. Emails placed into sub-folders of the selected location will file to the identically named system folder. The structure of folders within the selected Outlook folder does not need to match the file system directly - meaning you can group projects/clients/topics differently within your Outlook folders and it will still locate the correct folder to place the email in. This feature is available to eFiler365+ subscribers.

In the eFiler365 hub under User options click on the + to add a rule.

1. Select Folder name under Rule type
2. Select the appropriate target storage location (must have been previously added under Destinations)
3. Select the mailbox integration account
4. Select the designated Outlook Folder to monitor (all sub-folders under this path will be considered). If the required folder is not yet available please create it first in Outlook or use the + option within the UI to add a folder to monitor.
5. Finally toggle the Sub-folders option and specify a sub-folder consistent sub-folder if required (eg. emails or correspondence)
6. Select Add.
7. Finally click on Save to apply the rule.

**Rule type**

Folder name

**Storage**

R:\

**Select folders**

sm@latitude-it.net

eFiler365-SYNC

Subfolders

Emails

**save** **Close**

**eFiler**

- Home
- Account Integrations
- Destinations
- User options
- Administration

User options

Autosave emails matching patterns

User rules

PATTERN	STORAGE	SUBFOLDERS	ACTIONS
Folder name Rule	R:\	Emails	<input checked="" type="checkbox"/> <input type="checkbox"/>

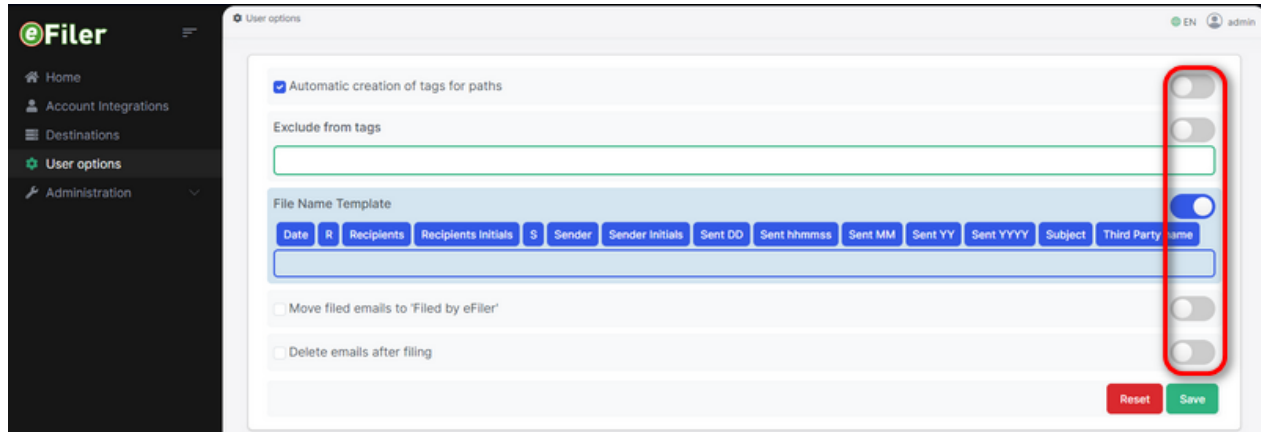
Common rules

## Policy Settings

This section is intended for system administrators

In order to apply policy settings you must be assigned the Company admin role on your eFiler365 hub account. This will normally be the first person who initiates contact with us. Additional Company administrators can be added or removed as required. Please contact support to request any changes.

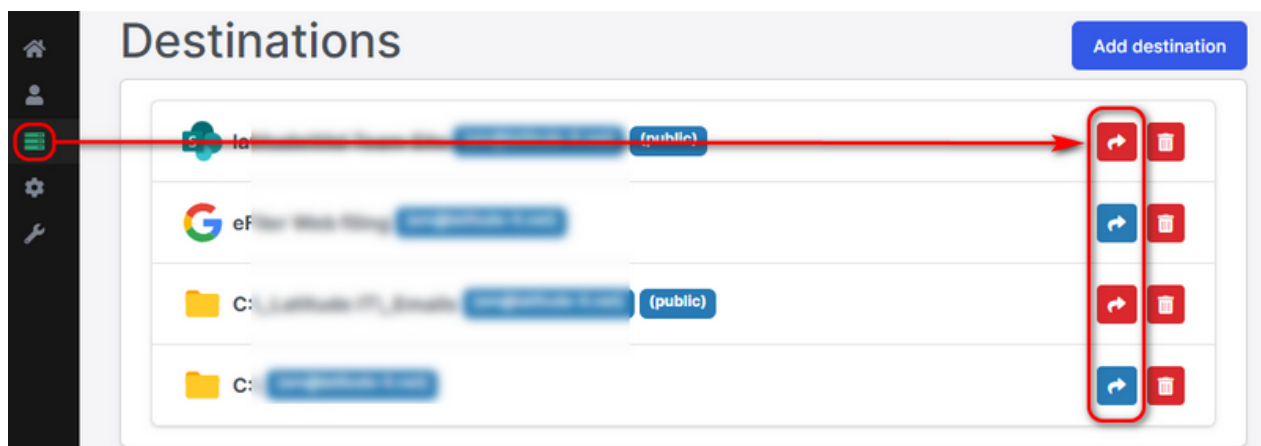
### Enforce a policy setting



If you wish to apply a setting to all company users please login to the eFiler365 hub as a company administrator, locate the setting under user settings and use the toggle to enforce the policy on all other company users. Once set only company administrators will be able to modify the setting.

### Shared locations

To share a location navigate to your destinations in eFiler365. Company administrators will be able to share and unshare filing destinations. Once a destination is shared it becomes available to all other users within the company.



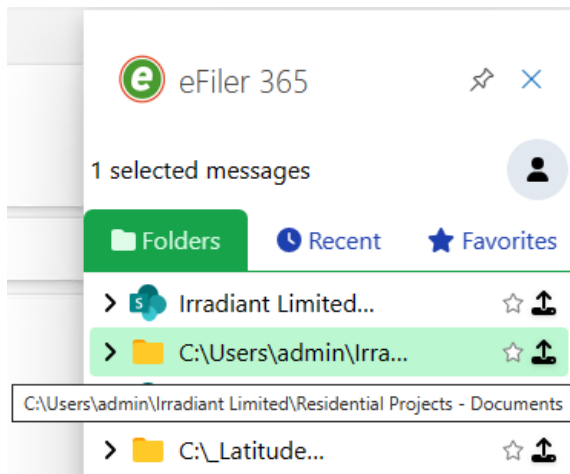
Toggle the publish icon to share/unshare a location

Notes - you can share a location to users even if they have no direct access to the location. The share is dependant on access rights of your own account and which folders your account has access to. Where required you may want to setup a specific user account for the eFiler Sync UI

service. It is important to note that even if a user can browse to file emails in folders they may not have direct access to they cannot gain access to the folder directly through eFiler.

## Using the eFiler365 sidebar

The eFiler365 sidebar has 3 available tabs -



### Folders

- Use the folders tab to browse storage locations
- Add a location to favorites
- Hover over a location to see the full path
- With one or more emails selected click on the upload icon to file the email(s)

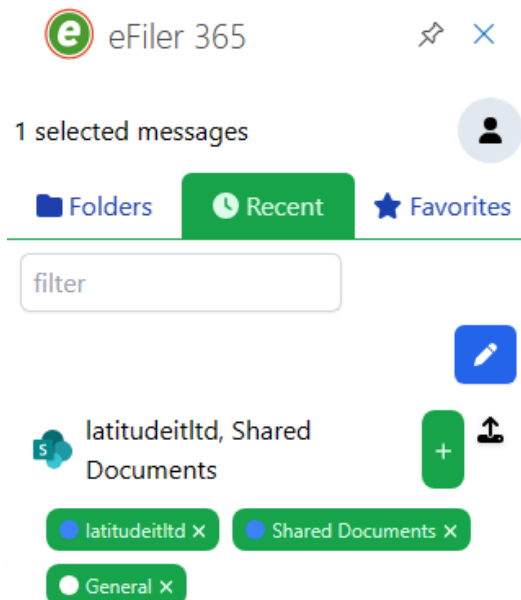
### Recent

- See a list of recently used filing locations
- Click on the edit icon to edit the tags available

### Favorites

- A list of your favorite locations
- Click on the edit icon to edit the tags available

## Managing tags



The Recent and Favorite tabs in eFiler365 display locations as easily readable tags.

- Click on the pencil icon to edit tags
- Click on + to add a tag to a location
- Select the dot adjacent to each label name to toggle a tag to be hidden or visible. Hidden tags remain valid for filtering.
- Select 'x' adjacent to a label to remove a label

Note - manage label exclusions automatically by settings 'exclude' options in [eFiler365 hub settings](#)

Consideration - avoid unnecessary labels by connecting to your storage location at the appropriate folder level.

## Using eFiler365 on mobile devices

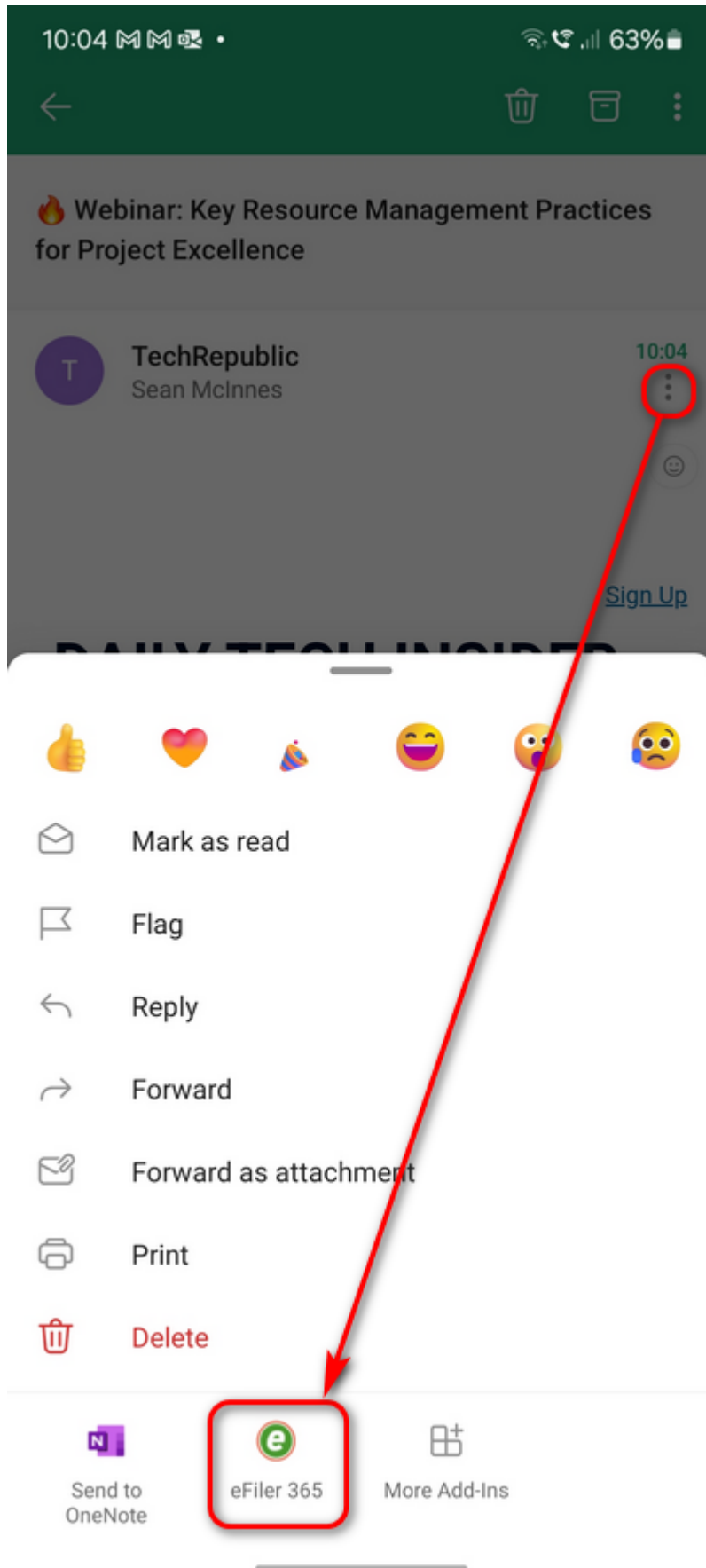
---

Once eFiler365 is connected to your Office 365 account it will be available for use on Desktops, tablets and mobile devices.

### Using eFiler365 on Android

- Open the email you wish to file
- Select the menu bar
- Select eFiler365 (drag the window up to reveal the app if it does not appear at first)
- Once eFiler365 opens select your location with a single tap and follow through with a second tap to confirm filing
- Some devices are able to show the eFiler category mark is applied. The email may move





10:05 M M M • 📶 📶 📶 62%

✕ eFiler 365

1 selected messages ⚙️ 👤

📁 Folders 🕒 Recent ★ Favorites

filter

⬆️ ✎

- 📁 Ebay emails ⋮
- 📁 Latitude emails ⋮
- 📁 Paypal emails ⋮
- 📁 eFiler emails, eFiler365 ⋮
- 📁 Attachments, eFiler emails ⋮

## Using eFiler365 on iOS

- Open the email you wish to file
- Select the menu bar
- Select eFiler365 (drag the window up to reveal the app if it does not appear at first)
- Once eFiler365 opens select your location with a single tap and follow through with a double tap to confirm filing

## eFiler Sync for local/network locations

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To add local/network locations as filing destinations requires the installation of the eFiler Sync UI application. The use of the eFiler Sync UI is not required for cloud connections.

eFiler Sync can be installed and applied in one of 2 ways (or a combination of both) -

**Standalone mode** - Suitable for individual users with 5 or less users. Each installation is managed by the user and files emails on behalf of the user. The software is active when the user is logged in to their computer. [Jump here](#)

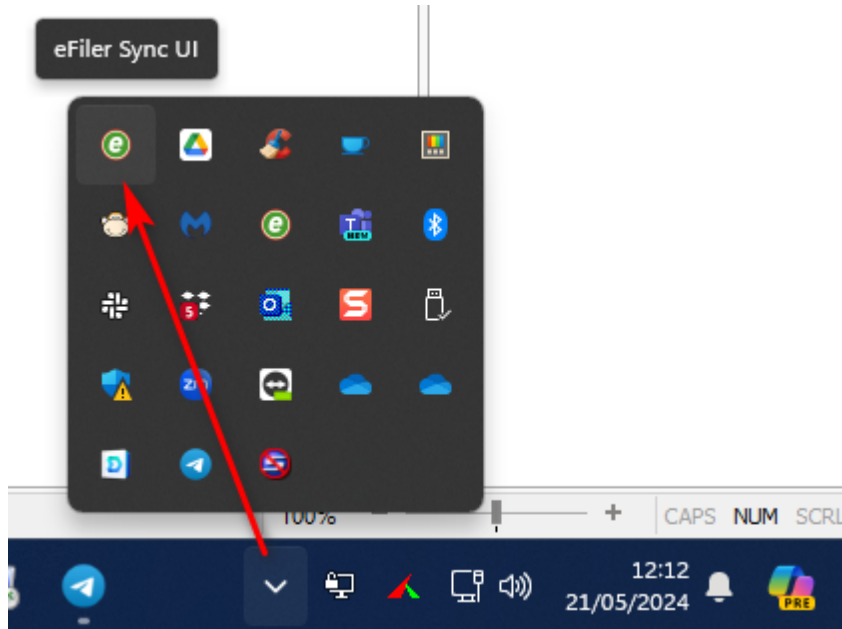
**Server mode** - Requires more advanced setup and a minimum of 5 licences. A centralised approach to provide common access to a list of shared filing locations. eFiler Sync is run in server mode as a service (typically install on a server running 24/7/365). [Jump here](#)

## eFiler Sync Standalone

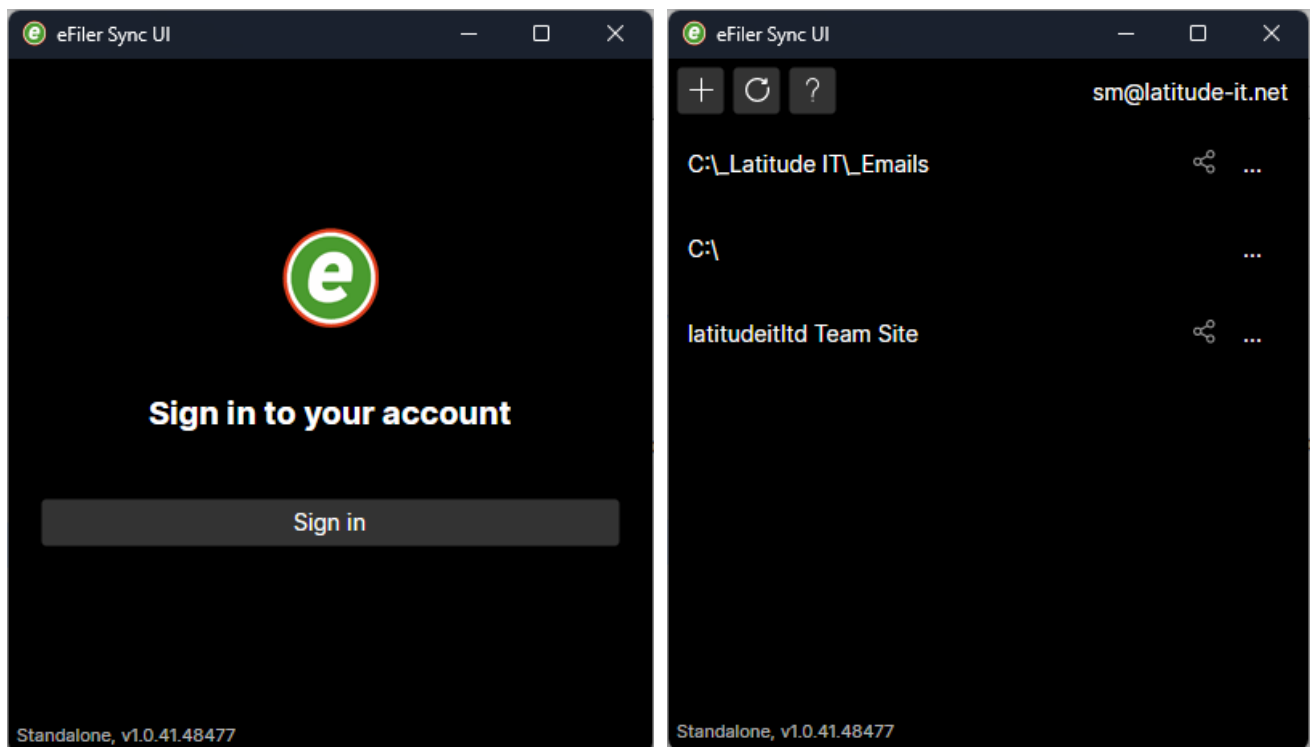
Saving emails to local folders requires you to install the eFiler Sync UI desktop client.

Download the latest eFiler Sync UI client.

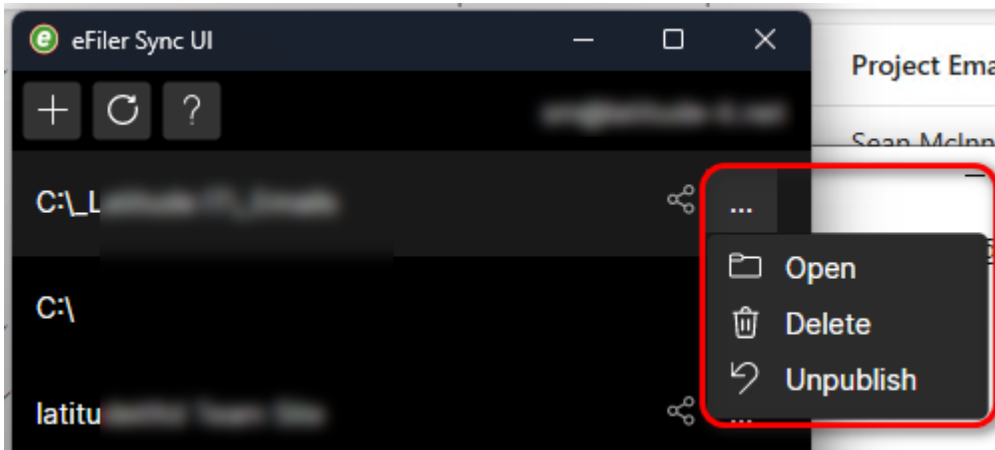
Install the software by double clicking on the installer



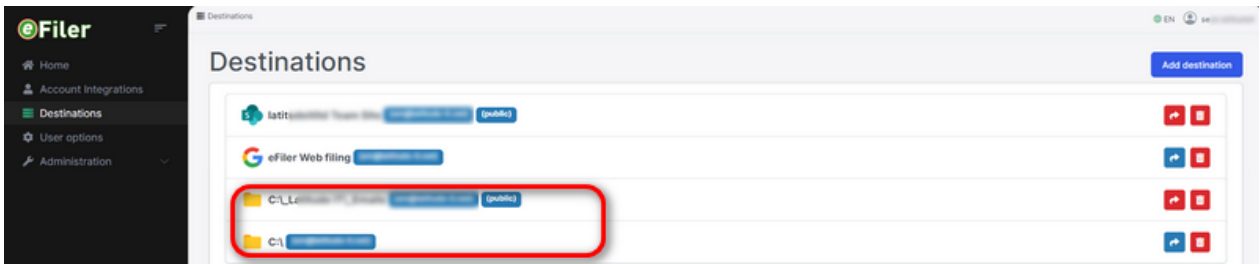
The software will autorun once the installation completes and can be found in the system tray (look for eFiler Sync UI)



Sign in to your eFiler365 hub account and use the + icon to add filing destinations



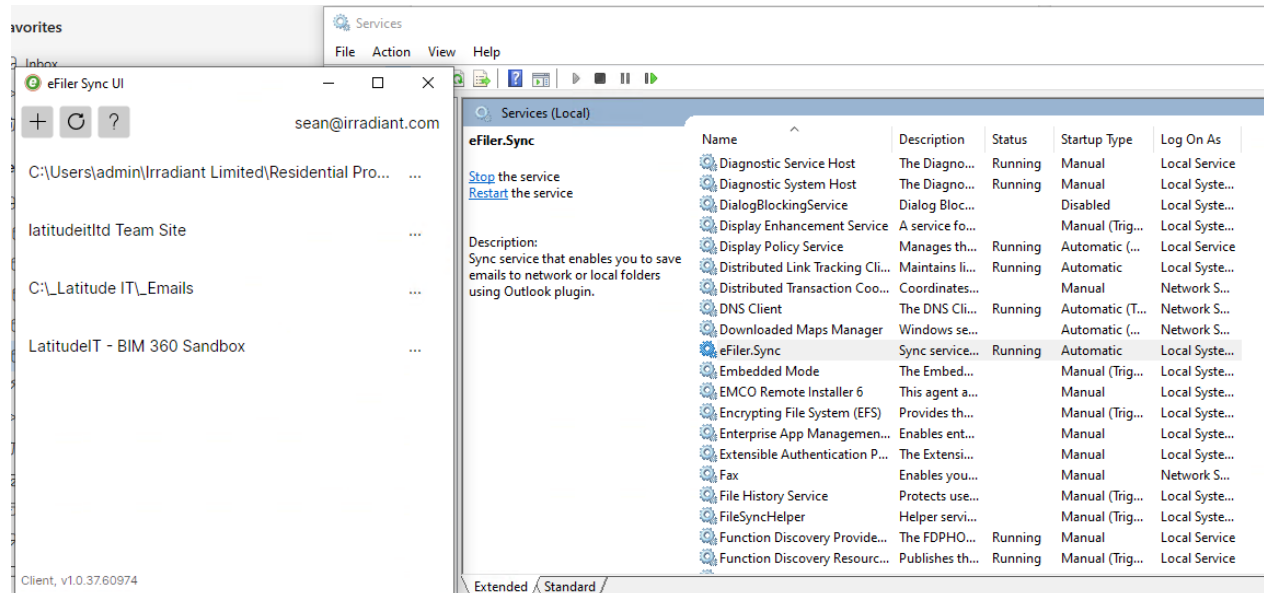
To remove locations use the side menu ( ... ) to select the option to Delete a location.



Once a location is added it will become visible within your eFiler365 hub as a destination

## eFiler Sync as a Service

This section is intended for company administrators, and is the typical option used for a centralised / server deployment.



eFiler Sync can be installed and run as a service. The benefits are as follows –

eFiler Sync continues to run when the user is logged off. This means any email filed while the service is running will be saved into the destination folder (assuming server availability).

Where companies adopt a centralised approach it is not necessary to install the standalone eFiler Sync UI client on individual user computers.

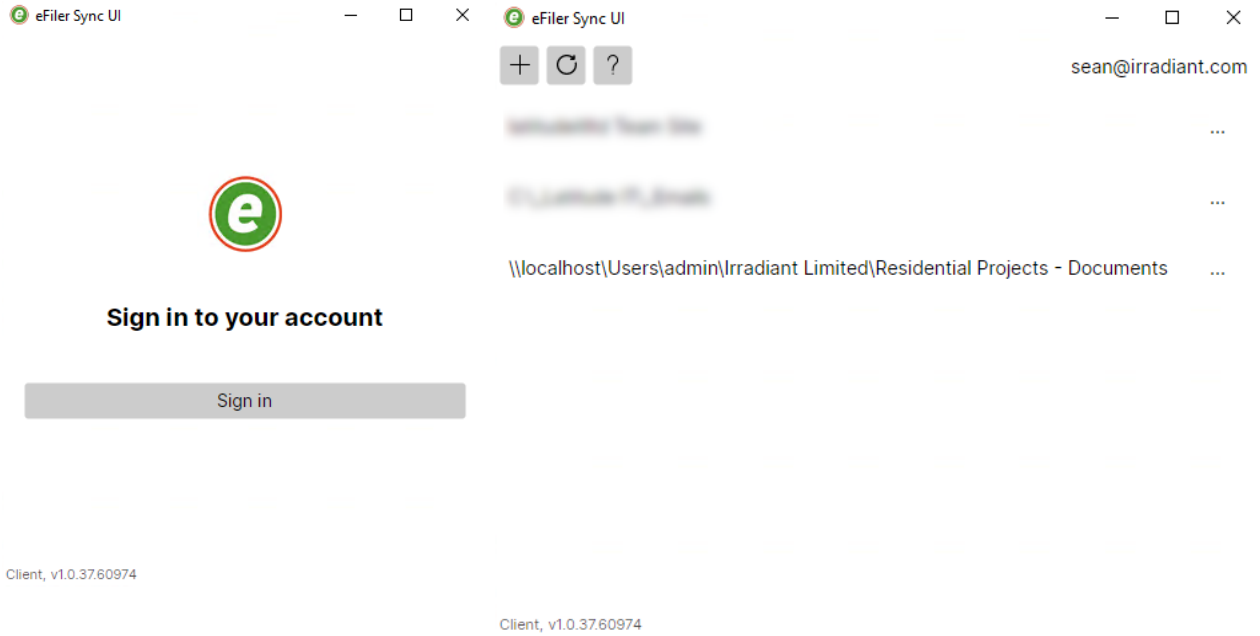
A single instance of eFiler Sync running as a service can be used to share locations to other users within the organisation\*

To install eFiler Sync in server mode –

Download the latest installer for eFiler Sync Service (note this is different to the standalone eFiler Sync application)

Double click the installer or run the installed from an elevated command line. The installer will register the eFiler.Sync service and it will also install the eFiler Sync UI client (in Client mode)

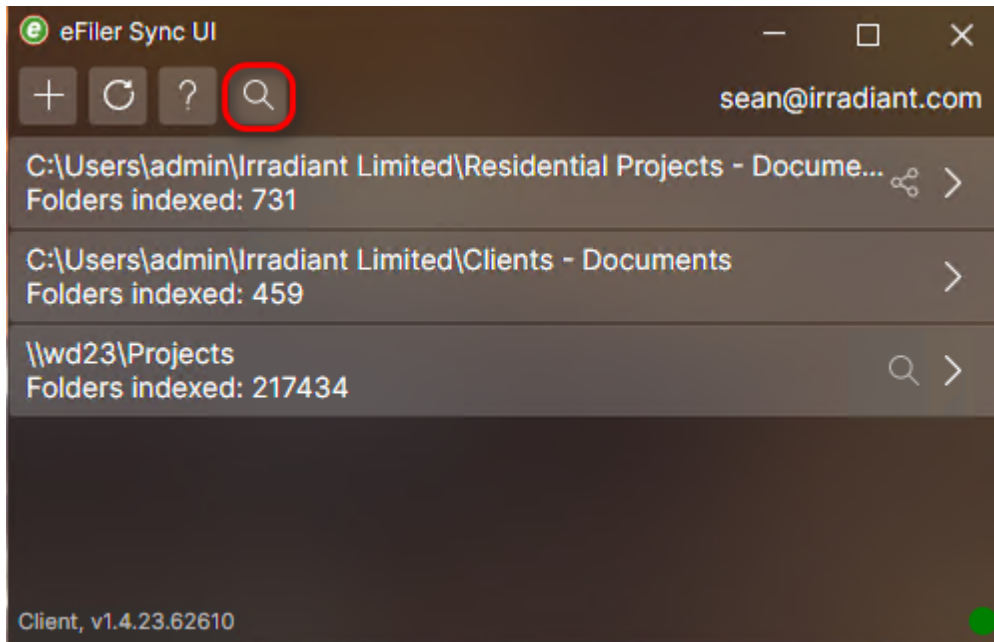
\*Note that any locations accessible to this user and shared with others will become accessible filing destinations for all users within the company. Only users with permission to access the folder in Windows Explorer will be able to open the folder and review saved emails but if the location is made available within eFiler any user the location is shared with will be able to file emails to the location.



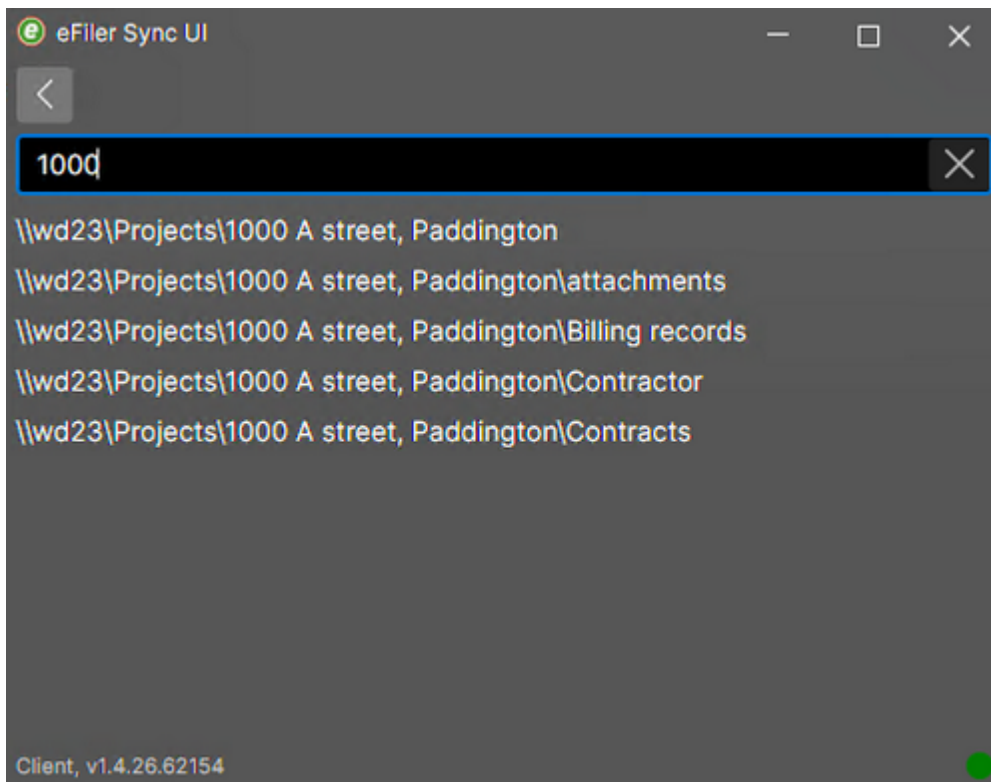
Next open the eFiler Sync UI client, sign in using your company admin account and add locations using UNC paths (required when eFiler Sync runs as a service which does not have access to mapped user drives)



## Location Search function

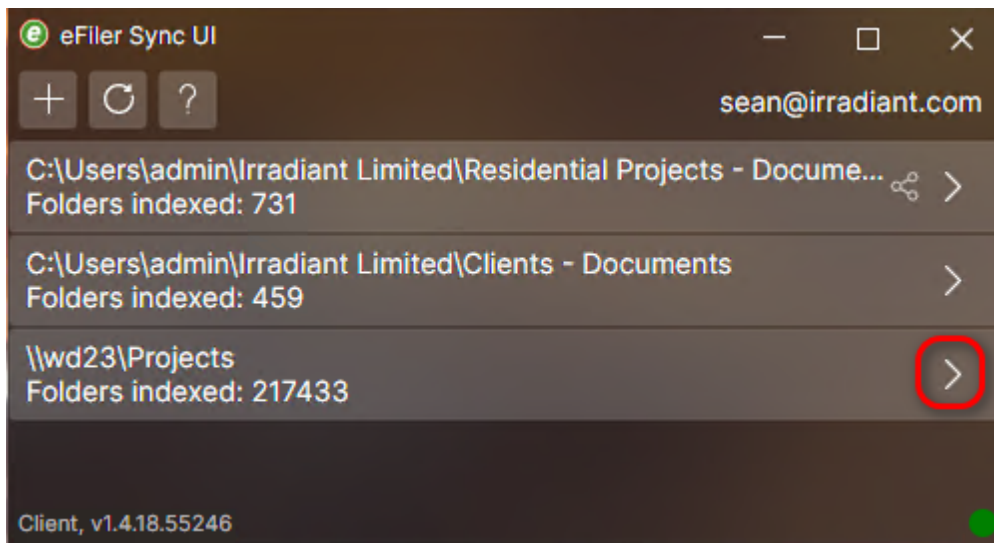


Open Sync UI from the system tray (look for the eFiler Icon near the time) and locate the search function

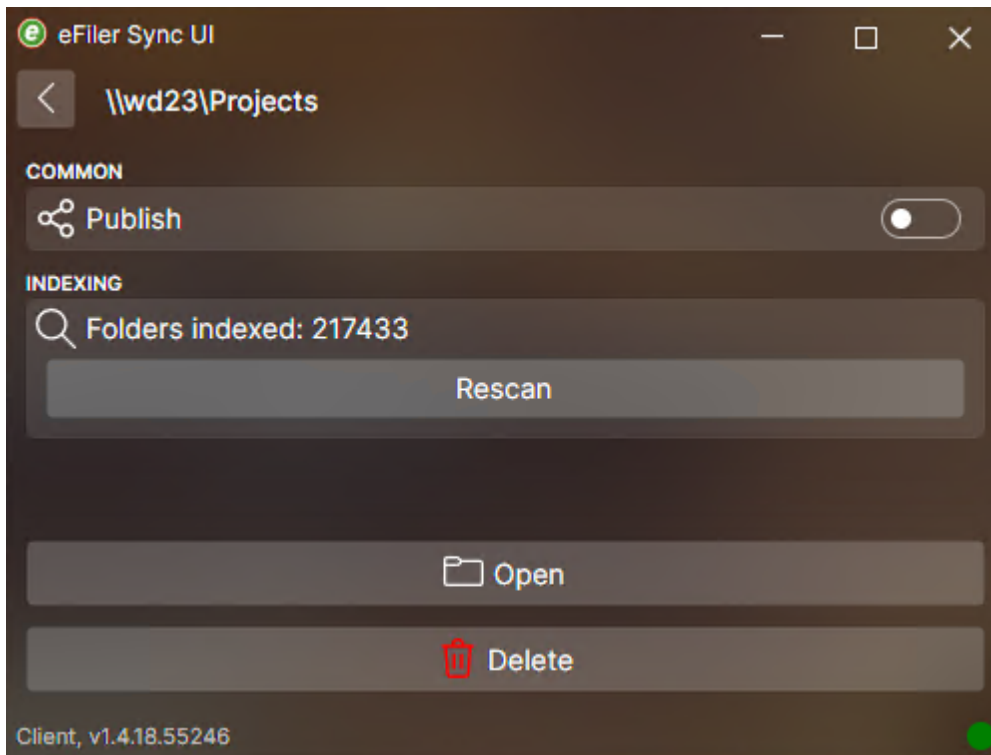


Type to search for known locations

## Share, Rescan or Delete a location



In eFiler Sync UI select the > option to view the location options



Select Publish to share the location with all users in your company (only available when logged in as an admin account user)

Select Rescan to refresh the index

Select Open to open Windows Explorer at the selected location

Select Delete location to remove the location from eFiler sync

## Troubleshooting

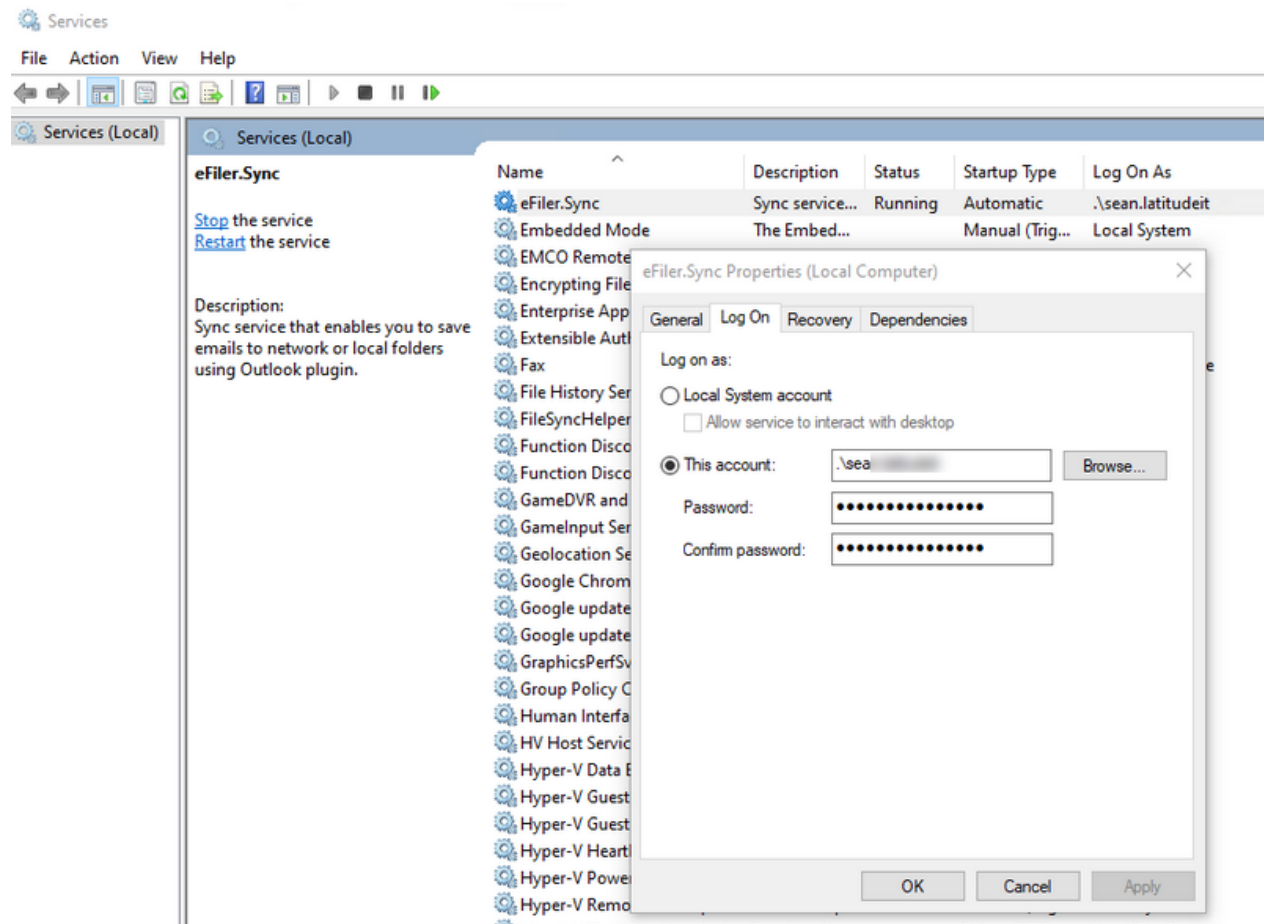
### Troubleshooting eFiler Sync

#### eFiler sync is running as a service

When eFiler sync is running as a service it will run under the SYSTEM account by default. The SYSTEM account does not have access to mapped drives. Mapped drives are assigned to users only. In order for the service to index locations ensure the following -

- Specify the locations in eFiler Sync UI Client by using their UNC paths
- Where required set the service to run under an account that has permission to access to target destination path specified\*.

\*If you are running a separate NAS you may need to create a user with the same username and password as your domain (if the NAS is not AD integrated)



## Log Files for eFiler Sync

Standalone mode - Log files for eFiler Sync running in Standalone mode will be located in the roaming profile path

C:\Users\%username%\AppData\Local\eFiler.Sync\Logs

Service mode - Log files for eFiler Sync running in Service mode will be located in one of the following paths -

C:\Windows\System32\config\systemprofile\AppData\Local\eFiler.Sync\Logs (default - where the service is running under the SYSTEM account)

or

C:\Users\%username%\AppData\Local\eFiler.Sync\Logs (where the service is set to run under a specific user)

## eFiler Sync Indexing Configuration

eFiler Sync relies on 2 controls to maintain the index of locations. The primary index is generated by eFiler Sync when a location is added and then it is updated/renewed periodically based on the scheduled rescan interval. Edit the line that reads `IndexInterval: "1.00:00:00"`. The format is days.hours:minutes:seconds. To adjust the rescan interval edit the files mentioned below -

Standalone installation -

C:\Users\%username%\AppData\Roaming\Irradiant Ltd\eFiler Sync Standalone (x64)  
\eFiler.Sync.UI\appsettings.Production.json

Service mode installation (based on the version that was installed) -

C:\Program Files\Irradiant Ltd\eFiler Sync Service (x64)  
\eFiler.Sync.UI\appsettings.Production.json

In addition to the rescan interval eFiler Sync will monitor the folder for changes when it is running. In most cases changes will be detected and added to the index automatically. The rescan interval is there to ensure the index is checked and refreshed periodically should live edits not be detected. Rescanning is more important where the application is shut down for periods of time while colleagues may be adding and removing locations. The optimum solution is to install eFiler Sync in Service mode on a server to allow for instant updates to be recorded as changes are made by others.

## Notes for System Administrators

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### Assign eFiler365 to Multiple users

1. Log on to the **Microsoft 365 admin center** with your Global Administrator account.
2. On the left click **Show all** and go to **Settings** → **Integrated apps** and click **Get apps**.
3. **Search** for eFiler365 and select **Get it Now**
4. On the **Add users** screen, select an option under **Assign users**, and click **Next**.
5. On the **Accept permissions requests** screen, review the app permissions and capabilities, and click **Next**.
6. On the **Review and finish deployment** screen, review the information and click **Finish deployment**.

Wait a few minutes for the deployment to complete.

According to Microsoft, it can take up to 24 hours for a newly deployed add-in to appear on the app ribbon in your users' Outlook mailboxes. Your users may need to relaunch Office to view the add-in icon on the app ribbon.

## Azure Permissions

This section is provided for information and troubleshooting only. [Deploying eFiler as an application](#) would automatically grant eFiler adequate permissions for operation.

eFiler365 connects to each users account to process emails on their behalf. In order to facilitate this the first person to install the addin will require global admin permissions for the tenant to 'allow consent' which will allow subsequent users to install the addin. Once installed you can find the permissions in your Azure portal under Enterprise Applications, All Applications, eFiler365 (now know as Microsoft Entra ID)

The following are extracts from a previously configured tenant -

The screenshot displays the Microsoft Azure portal interface for the 'eFiler 365 Production' Enterprise Application. The breadcrumb navigation shows the path: All services > Enterprise applications > Enterprise applications | All applications > eFiler 365 Production. The left-hand navigation pane includes sections for Overview, Deployment Plan, Diagnose and solve problems, Manage (with sub-items like Properties, Owners, Roles and administrators, Users and groups, Single sign-on, Provisioning, Self-service, and Custom security attributes), Security (with sub-items like Conditional Access, Permissions, and Token encryption), and Activity (with sub-items like Sign-in logs, Usage & insights, and Audit logs). The main content area shows the 'Properties' page for the application, which includes a 'Save', 'Discard', and 'Delete' menu, and a 'Got feedback?' link. The page contains descriptive text about managing application settings and a list of properties:

- Enabled for users to sign-in?** Yes (selected) / No
- Name**: eFiler 365 Production
- Homepage URL**: https://efiler.co.uk/
- Logo**: A green circle with a white 'e' inside a red border.
- Application ID**: [Redacted]
- Object ID**: [Redacted]
- Assignment required?** Yes / No (selected)
- Visible to users?** Yes (selected) / No
- Notes**: [Empty text box]

**Microsoft Azure** | Search resources, services, and docs (G+)

All services > Enterprise applications > Enterprise applications | All applications > eFiler 365 Production

**eFiler 365 Production | Permissions**

Enterprise Application

Refresh | Review permissions | Got feedback?

**Permissions**

Below is the list of permissions that have been granted for your organization. As an administrator, you can grant permissions to this app on behalf of all users (delegated permissions). You can also grant permissions directly to this app (app permissions). [Learn more.](#)

You can review, revoke, and restore permissions. [Learn more.](#)

**Grant admin consent for**

Admin consent | **User consent**

Search permissions

API Name	Claim value	Permission	Type	Granted through	Granted by
<b>Microsoft Graph</b>					
Microsoft Graph	User.Read	Sign in and read user profile	Delegated	User consent	1 total user(s)
Microsoft Graph	Mail.Read	Read user mail	Delegated	User consent	1 total user(s)
Microsoft Graph	Mail.Read.Shared	Read user and shared mail	Delegated	User consent	1 total user(s)
Microsoft Graph	Mail.ReadWrite	Read and write access to user mail	Delegated	User consent	1 total user(s)
Microsoft Graph	Mail.ReadWrite.Shared	Read and write user and shared ...	Delegated	User consent	1 total user(s)
Microsoft Graph	MailboxSettings.Read...	Read and write user mailbox setti...	Delegated	User consent	1 total user(s)
Microsoft Graph	offline_access	Maintain access to data you have...	Delegated	User consent	1 total user(s)
Microsoft Graph	Sites.Read.All	Read items in all site collections	Delegated	User consent	1 total user(s)
Microsoft Graph	Sites.ReadWrite.All	Edit or delete items in all site coll...	Delegated	User consent	1 total user(s)

Note that all permissions requested are delegated permissions which requires the user to login securely with their credentials to enable processing.

## Installing eFiler Sync UI

eFiler Sync UI is the desktop component that enables users to bridge their eFiler Hub account to local/network folders to facilitate email filing to client or project folders. eFiler Sync UI is provided as 2 different installers.

eFiler Sync Standalone installation that installs under the user profile typically found here - C:\Users\%username%\AppData\Roaming\Irradiant Ltd\eFiler Sync Standalone (x64 edition)\eFiler.Sync.UI

eFiler Sync Client installation that is installed along with the eFiler Sync windows service and is to be found here - C:\Program Files\Irradiant Ltd\eFiler Sync Client (x64 edition)

The eFiler Sync Client / Service combination is required where you want to run the application on a server (can be unattended). Please remember that services do not have access to mapped drives when the user is logged off so make sure you add locations using UNC paths or a localhost path reference.



## Control the rescan interval of eFiler Sync

When a location is added to eFiler Sync it is automatically indexed. When subsequent folders are added to the file system they are normally detected automatically. A rescan is required where computers are offline while folders are added or where you want to ensure the complete folder list is refreshed.

You can control the rescan interval of eFiler sync by editing the values in the following file -

Where eFiler Sync is installed in User mode -

C:\Users\%username%\AppData\Local\eFiler.Sync\options.json

Where eFiler Sync is installed in Service mode -

LocalSystem - C:

\Windows\System32\config\systemprofile\AppData\Local\eFiler.Sync\options.json

Running as service with credentials - C:\Users\%username%

\AppData\Local\eFiler.Sync\options.json (%username% will be user service is running under)

```
{
  "IndexIntervalTime": "00:30:00",
  "ScanStartTime": "00:00:00"
}
```

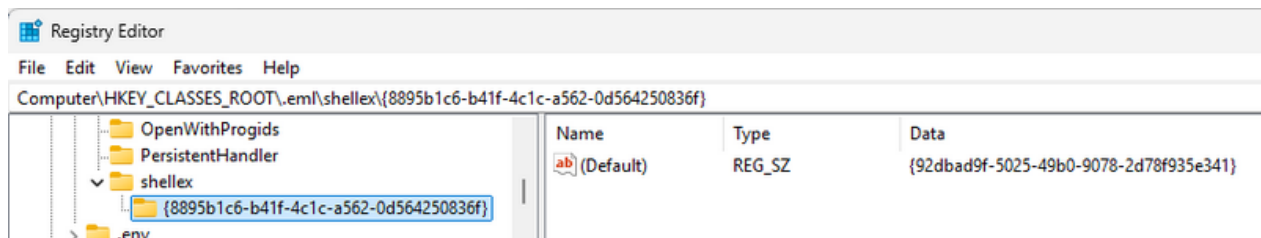
IndexIntervalTime can be set in the format 7.08.09.10 where 7 represents days, 08 represents hours, 09 represents minutes and 10 represents seconds between rescans  
ScanStartTime is used to control the time from which the interval time is calculated and is represented in hours, minutes and seconds.

Set and adjust the rescan interval to suit your requirements. Remember in most cases if eFiler Sync is running as a service on a server it should require less frequent rescans. Please restart the service after adjusting the interval or start time.

## Enable .eml file preview in Explorer

Complete the steps below to enable preview of .eml files in Windows Explorer. Modifying the registry requires local admin rights

1. Right-click Start and select Run.
2. Type regedit.exe and select OK.
3. Locate the following registry key - **HKEY\_CLASSES\_ROOT\.eml**
4. Select the .eml key and right click and select New and then Key
5. Name the new key **shellex**
6. Select shellex and right click again to create a new subkey -  
{8895b1c6-b41f-4c1c-a562-0d564250836f}
7. Select the new key and double click on the (Default) value on the right and set the value to -  
{92dbad9f-5025-49b0-9078-2d78f935e341}



## View .eml file details using Windows Explorer

It can be useful to display additional details for .eml files in Windows Explorer.

Name	Date modified	Type	Size	Date created	Title	From addresses	To addresses
20241028 222111 Join us for Microsoft 365 Copilot Developer Camp.eml	05/01/2025 18:58	E-mail Message	70 KB	07/11/2024 13:09	Join us for Microsoft 365 ...	<M365Dev@e-mails.micr...	

The following fields are available -

From

From Address

Authors (includes From and From Address)

To

To Address

Subject (or Title)

Date Sent

## Troubleshooting email filing

For users with direct connection to cloud storage -

Check in [eFiler hub](#) that the integration is authenticated

Confirm your subscription is valid within [your account](#)

For users with eFiler Sync installed -

Check if eFiler Sync running, logged in and authenticated

Is the destination storage available to eFiler Sync

If eFiler Sync is running as a service check to make sure that the account it is running under has access permissions to the destinations added

Has eFiler Sync indexed the locations - compare the folder count of the index and consider a rescan. Use the search feature in eFiler Sync to review which folders are known to the index.

Check in [eFiler hub](#) that the integration is authenticated

Confirm your subscription is valid within [your account](#)

## **Licensing and activation**

Each user who requires access to eFiler 365 requires a license. Licenses can be re-assigned to new user accounts by recovering licences from inactive users. Only users with active licences are able to process emails for filing.

Volume licensing can be achieved by providing a list of valid email addresses.