SERVER ONBOARDING PROCESS

fileflex.

This document (and video) give you a high-level overview to the onboarding of a FileFlex server so that you can understand how the process works before you begin your installation. Since you must switch tasks between the Partner Portal environment and your VM environment, they are color coded so that you will understand the flow.

1 PREPARE IN ADVANCE

PREPARE PRE-INSTALLATION

You must have:
1. A domain name with valid DNS entries ready to point to your virtual FileFlex deployment.
2. A valid e-mail delivery server or service with appropriate credentials ready.
3. A valid SSL certificate for your Domain used for your FileFlex deployment.
4. Administrator email address.

2 FROM THE PORTAL

DOWNLOAD THE INSTALLATION MANUAL

Click Here to Download

3 FROM THE PORTAL

CREATE FILEFLEX SERVER DEPLOYMENT

From the partner portal, create your FileFlex server deployment. You will need to provide your URL and an Email from Step 1 (see "Help and How to Use Portal" section under Support – Portal).

4 FROM THE PORTAL

DOWNLOAD FILFLEX SERVER IMAGE

Download the FileFlex Server VM Image (OVA file) from the Partner Portal.

5 FROM YOUR VM

CREATE A VM ON YOUR SERVER

Prepare a Virtual hosting environment such as VMware or VirtualBox. Refer to section 3 of installation manual for complete compatibility list for virtualization environment and HW requirements.

6 FROM YOUR VM

INSTALL FILEFLEX SERVER

Import OVA and start the VM Initial Setup Wizard. It will start automatically after installation. Follow the instructions in section 3 of the Installation Manual on How to Import and Deploy the FileFlex Server in a VM.

7 FROM YOUR VM

CONFIGURE YOUR FILEFLEX SERVER

After re-start from Installation Wizard, GUI based FileFlex Configuration Wizard will start automatically. Follow Wizard and the instructions in section 5 of the installation manual to complete initial Configuration setup.

Proceed to configure all necessary configuration Items in Control Panel and ensure all mandatory items have green checkbox:

- Verified FileFlex Credentials   **(Mandatory)**
- Configured Email delivery system   **(Mandatory)**
- Custom SSL Certificates   **(Mandatory)**
- User Admin Account   **(Mandatory)**

- Two Factor authentication   (Optional)
- Customized Splash screen   (Optional)
- Customized 3rd party cloud   (Optional)

8 FROM THE PORTAL

ENABLE AND ASSIGN KEYS TO YOUR FILEFLEX

Go back to the portal. Select your deployment and enable it. Assign keys (or seats) to your deployment.

9 FROM THE SERVER ADMINISTRATION PANEL

CREATE AND CONFIGURE COMPANIES & USERS

Click on Manage Users in the Server Administration Panel to open the FileFlex User Administration Console.

Follow the Help section from the Global Application Bar Menu to review the Company and User Onboarding to perform task like:

- Create a Company
- Create user
- Create departments

- Create Permission Sets and Assign to users/Departments
- Add Content Sources

- Assign Content Sources to users/Departments
- Add Users

COMPLETE

You can start uploading and sharing files securely, across multiple devices, anywhere in the world!