

**FORTRA**

# **FileCatalyst**

*FileCatalyst Server*  
*QuickStart Guide*



1	Installation .....	2
1.1	Verify system environment.....	2
1.2	Open Firewall .....	2
1.3	Perform Installation .....	2
1.3.1	Windows .....	2
1.3.2	Linux.....	3
1.4	Enable Service .....	3
2	Licensing FileCatalyst Server .....	4
2.1	Apply a License Key .....	4
2.2	Updating a License Key .....	5
3	Remote Administration.....	6
3.1	Enable Remote Administration.....	6
3.2	HTTP Access .....	7
3.3	Install Remote Server Administration Client.....	7
3.3.1	Windows .....	7
3.3.2	Linux.....	8
3.4	Create a Remote Administration Connection.....	8
4	Managing Users .....	10
4.1	Add a New User .....	10
4.2	Editing a User .....	13
5	Additional Features.....	15
5.1	Advanced Settings.....	15
5.2	Security .....	16
5.3	IP Filters.....	16
5.4	Email Alerts .....	17
5.5	Administration .....	18
5.6	HTTP Settings .....	18
5.7	Link.....	19
5.8	Reporting.....	19
5.9	Central.....	20
5.10	File Systems.....	20

5.11 System Monitor..... 21

6 Next Steps ..... 21

7 Support..... 21

# Introduction

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This guide assumes that you are using an operating system which uses a GUI, such as Windows™ or versions of Linux, and other \*nix-based systems using a windowed environment. The FileCatalyst Server may be run command-line only, but that option is not described in this document.

The FileCatalyst Server QuickStart will guide you through the following steps:

1. Installation
2. Running and licensing application
3. Connecting with Remote Administration Client
4. Creating and editing users
5. Overview of additional features

For visualization, this guide invokes a real-world scenario, only one of many possible ways to use FileCatalyst Server:

An example user's HotFolder is configured to upload data to this Server at a scheduled interval, only sending files that are new or that have changed. Several other HotFolders monitor the same user account and automatically download new content.

The HotFolder is responsible for the bulk of this scenario. All we need to accomplish on the Server end is create a user account which can be uploaded to or downloaded from. Once this is done, we will move to the FileCatalyst HotFolder QuickStart.

**Note:** Upgrade installation instructions are not included in this QuickStart guide. Please refer to the full Server User Guide available on the FileCatalyst website for upgrade instructions.

# 1 Installation

To complete a successful installation of the server, there are five steps:

1. Verify environment
2. Install the applications (the Server itself, and the Remote Administration Client)
3. Open your firewall
4. Apply a license key
5. (Optionally) Run the application as a service.

## 1.1 Verify system environment

FileCatalyst Server contains a 64-bit OpenJDK JRE 8 in order to run the application. Please ensure that you are running on a 64-bit system before installation.

## 1.2 Open Firewall

If your system is protected by a firewall, and you are uncertain how to configure it, you should consult with your IT department. In order for FileCatalyst Server to accept connections, you will need the following ports to be available and open:

- TCP on ports 21 (control connection) and 12400 (remote admin port)
- TCP and UDP on ports 8000-8999 (data port range)
- TCP on port 12480 when the Web admin or HTTP Servlet is being used.

Note: the control connection *and* the data port range must all be open; otherwise, you may establish connections and verify the presence of a server but fail to transmit actual data.

### **Note for \*nix users:**

Non-root users of a \*nix system are **not able** to open ports below 1024. To resolve this issue quickly for the purposes of demonstration, you may change the server port after installation. Run the application, go to the “Advanced” panel, and update the setting. The corresponding firewall port must be opened.

## 1.3 Perform Installation

**Note:** if you have another instance of FileCatalyst Direct Server running, you must exit before continuing with this guide. Be particularly careful to see if it has been started as a service and stop it accordingly.

### 1.3.1 Windows

1. Download the FileCatalyst Server installer (*install\_fc\_server.exe*) to your desktop
2. Launch installer. You should right-click the icon and select “Run as Administrator”. You will also need to trust the installer application.
3. Step through the wizard to choose installation directory and shortcut options

4. At end of wizard, click "Done"
5. Locate and launch the application from the Start Menu, at which time the License dialog appears.

### 1.3.2 Linux

1. Create directory at `/opt/utechsoft/server`
2. Download tarball (`fc_server.tar.gz`) to this directory
3. Use GUI-based archive tool to unpack the tarball, or open a terminal and enter with the following commands:

```
> cd /opt/utechsoft/server
> gunzip fc_server.tar.gz
> tar -xvf fc_server.tar
```
4. With the tarball unpacked, you will now have access to the README file. Open this file and continue following the instructions in order to complete installation
5. Assuming installation is complete and you are in the Server directory, enter the command `./fc_server.sh` to start the application in GUI mode, at which time the License dialog appears.

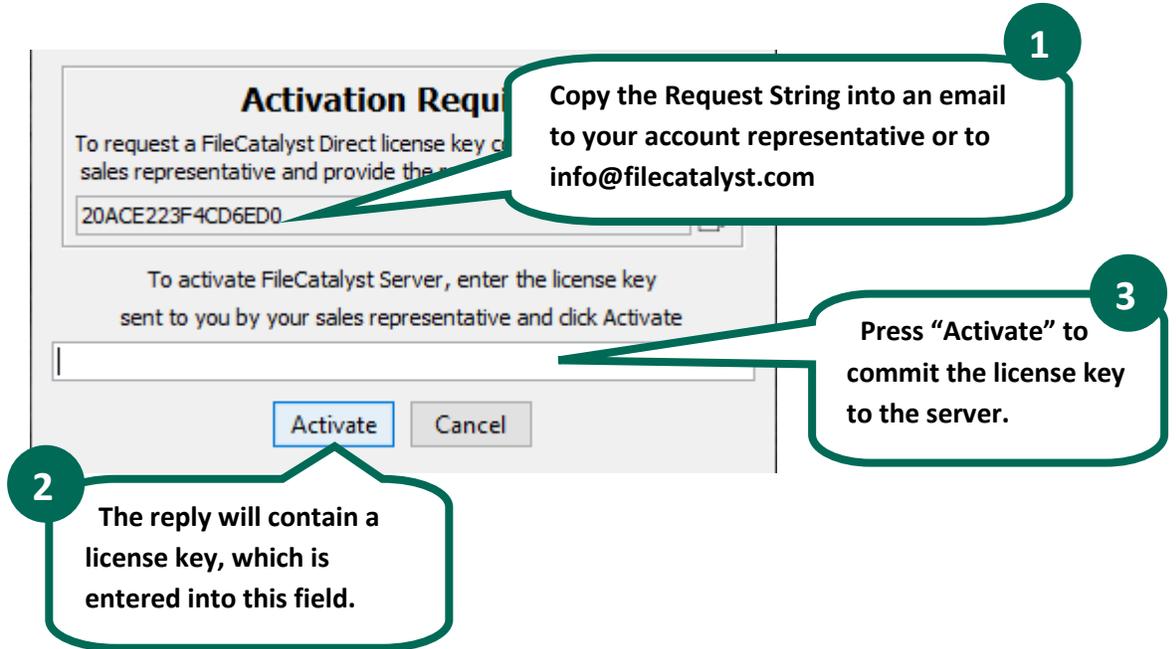
## 1.4 Enable Service

In almost all cases, FileCatalyst Server is most effective when run as a service. As a service, the application will continue with automated tasks after the machine has restarted for any reason. After completing the "QuickStart" document you are currently reading, you should consider referring to the main documentation. The chapter "Running at Startup" describes the procedure to run the application as a service for your given platform.

## 2 Licensing FileCatalyst Server

### 2.1 Apply a License Key

The first time you run FileCatalyst Server, a dialog box will prompt you to enter a new license key. Follow the instructions provided in the dialog in order to activate the product.



## 2.2 Updating a License Key

You may later wish to update your license key (e.g. to apply a full license or to upgrade). If the old license is still valid, this may be done from the Server GUI:

The screenshot shows the FileCatalyst Server Administration Console. The 'Server License' tab is selected, displaying the following information:

- Admin Version: FileCatalyst Server Administration Console Enterprise v3.8.6 Build 26 (09/28/2022 2027)
- Service Version: Enterprise v3.8.6 Build 26 (09/28/2022 2027)
- Request String: 20ACE223F4CD6ED0
- License Key: [Empty field]
- License Description: Expiry: Two Year, Bandwidth: 1000000000, Max Clients: 1000, Licenses: 1000, Allow: All

Four numbered callouts provide instructions:

- 1** Click "Advanced" (points to the 'Advanced' menu item in the left sidebar).
- 2** Select "Server License" tab (points to the 'Server License' tab in the top navigation bar).
- 3** Send the Request String to your FileCatalyst representative to obtain a key; copy this key into the License Key field. (points to the 'Request String' and 'License Key' fields).
- 4** Click "Apply" (points to the 'Apply' button at the bottom right).

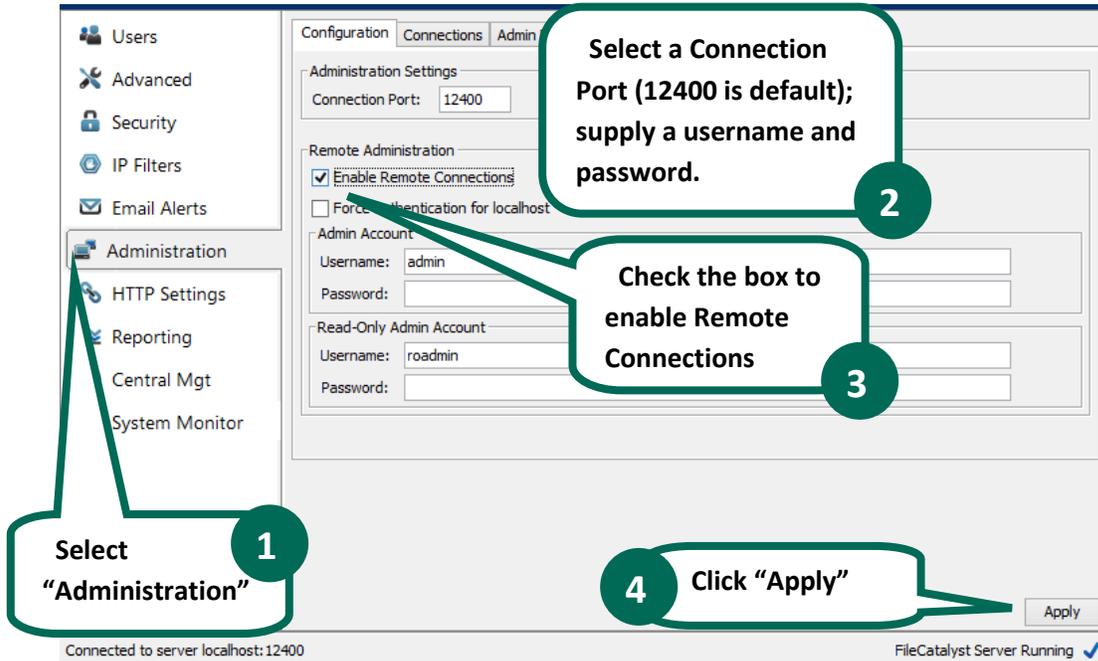
At the bottom of the window, it shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

### 3 Remote Administration

To remotely administer FileCatalyst Server, the option must first be enabled. The Remote Server Administration tool is then installed on another computer (e.g., your own workstation).

#### 3.1 Enable Remote Administration

Open FileCatalyst Server on the server machine. Then:



## 3.2 HTTP Access

- HTTP Config allows for a web browser session to administer the FC Server. Enable the Applet to access the HTTP Config settings. Enter an alias, choose the IP format and a port. The address will then be, as in the example below, <http://127.0.0.1:12480/fcs-applet.html> to access the admin panel via the web.
- Enabling HTTP Transfers gives the server the ability to fall back on HTTP transfers if a client is unable to use UDP or FTP.

The screenshot displays the FileCatalyst Server Administration web interface. On the left is a navigation menu with the following items: Users, Advanced, Security, IP Filters, Email Settings, Administration, HTTP Settings (highlighted), Link, Reporting, Central Mgt, File Systems, and System Monitor. The main content area is titled 'General Settings' and contains the following sections:

- General Settings:** Includes three checkboxes: 'Enable HTTP Transfers', 'Enable Link', and 'Use SSL', all of which are currently unchecked.
- HTTP Config:** Features a dropdown menu for 'Access IP' set to '127.0.0.1' and a 'Bind all interfaces' checkbox (unchecked). Below it is a text input field for 'Web Port' set to '12480'.
- Access Links:** Displays three links: 'Webroot: http://127.0.0.1:12480', 'Servlet: http://127.0.0.1:12480/servlet/ftpservlet', and 'Link: http://127.0.0.1:12480/ta/link/welcome.html'. A **Hint** below reads: 'Click links to open in default browser or right click to copy to clipboard'.
- Web Server Integration:** Contains a warning: '**Allows for integration with 3rd party web servers such as Apache or IIS.** Note that this will prevent the standard HTTP from working. All access must go through the configured web server.' Below this is an unchecked checkbox for 'Enable AJP Connector'.

An 'Apply' button is located at the bottom right of the configuration area. At the bottom of the page, a status bar shows 'Connected to server localhost:12400' on the left and 'FileCatalyst Server Running' with a checkmark on the right.

## 3.3 Install Remote Server Administration Client

It is recommended that you install an instance of the Remote Administration Client on a separate computer.

### 3.3.1 Windows

1. Download the installer (*install\_fc\_server\_admin.exe*)
2. Launch the installer as described earlier, and complete the wizard
3. Run FileCatalyst Server Admin from the Start menu to see the login dialog

### 3.3.2 Linux

1. Create directory at `/opt/utechsoft/serveradmin`
2. Download tarball (`fc_server_admin.tar.gz`) to this directory
3. Use GUI-based archive tool to unpack the tarball, or open a terminal and enter the following commands:

```
> cd /opt/utechsoft/server  
> gunzip fc_server_admin.tar.gz  
> tar -xvf fc_server_admin.tar
```

4. Make the shell script executable:

```
> chmod +x fc_server_admin.sh
```

5. Assuming installation is complete and you are in the Server Admin directory, enter the command

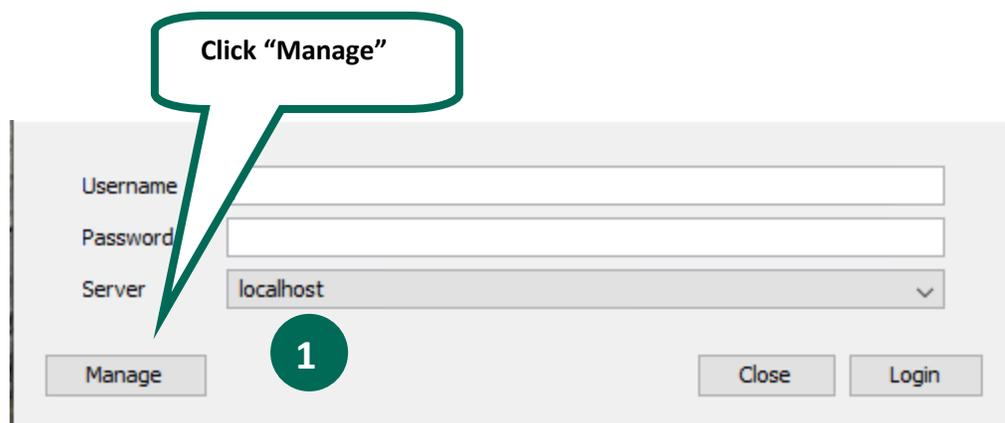
```
> ./fc_server_admin.sh
```

to start the Remote Admin GUI and see the login dialog.

## 3.4 Create a Remote Administration Connection

At this point, FileCatalyst Server is running on one machine, and the Remote System Administration Client is deployed to another. The next step is to connect the two.

With the Remote System Administration login dialog visible, continue as follows:



The screenshot shows the 'Manage Connections' dialog box. On the left, there is a list box containing 'localhost'. On the right, there are three input fields labeled 'Site Name', 'Remote Administration Host', and 'Port'. At the bottom, there are three buttons: 'Add New Site', 'Delete', and 'Close'. Callout 2 points to the 'Add New Site' button. Callout 3 points to the input fields and contains a list of instructions. Callout 4 points to the 'Close' button.

2 Press "Add New Site" button

3

1. Site Name of your own choosing.
2. IP or domain of the host Server
3. Port (12400 is default)

4 Press "Close"

The screenshot shows the 'Server Administration' login screen. At the top, it says 'Server Administration Enterprise v3.8.6 Build 26 (09/28/2022 2027)'. Below this are three input fields: 'Username' with 'Admin' entered, 'Password' with masked characters, and 'Server' with 'Test Site' selected in a dropdown menu. At the bottom, there are three buttons: 'Manage', 'Close', and 'Login'. Callout 5 points to the input fields and contains instructions. Callout 6 points to the 'Login' button.

5 Select Server, then enter credentials chosen when enabling Remote Administration

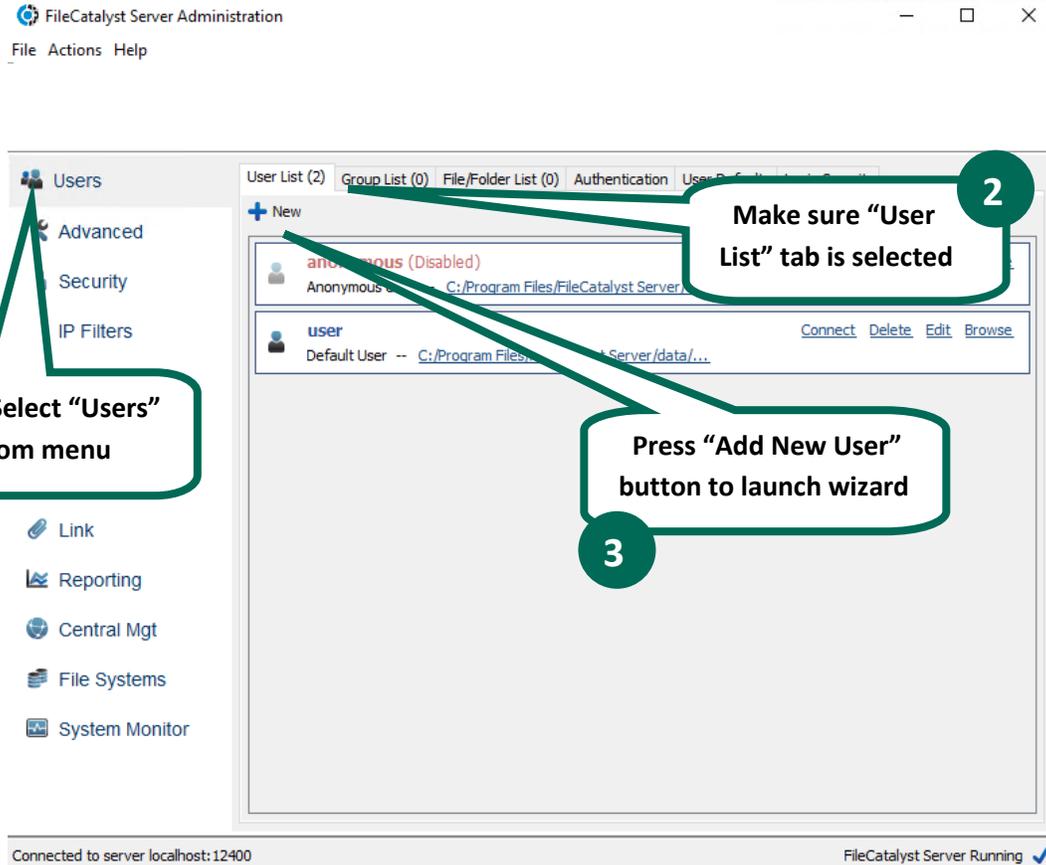
6 Click "Login"

If the site's IP/domain, username, and Password are correct, the Remote System Administration Client will log in and you will see the familiar FileCatalyst Server GUI.

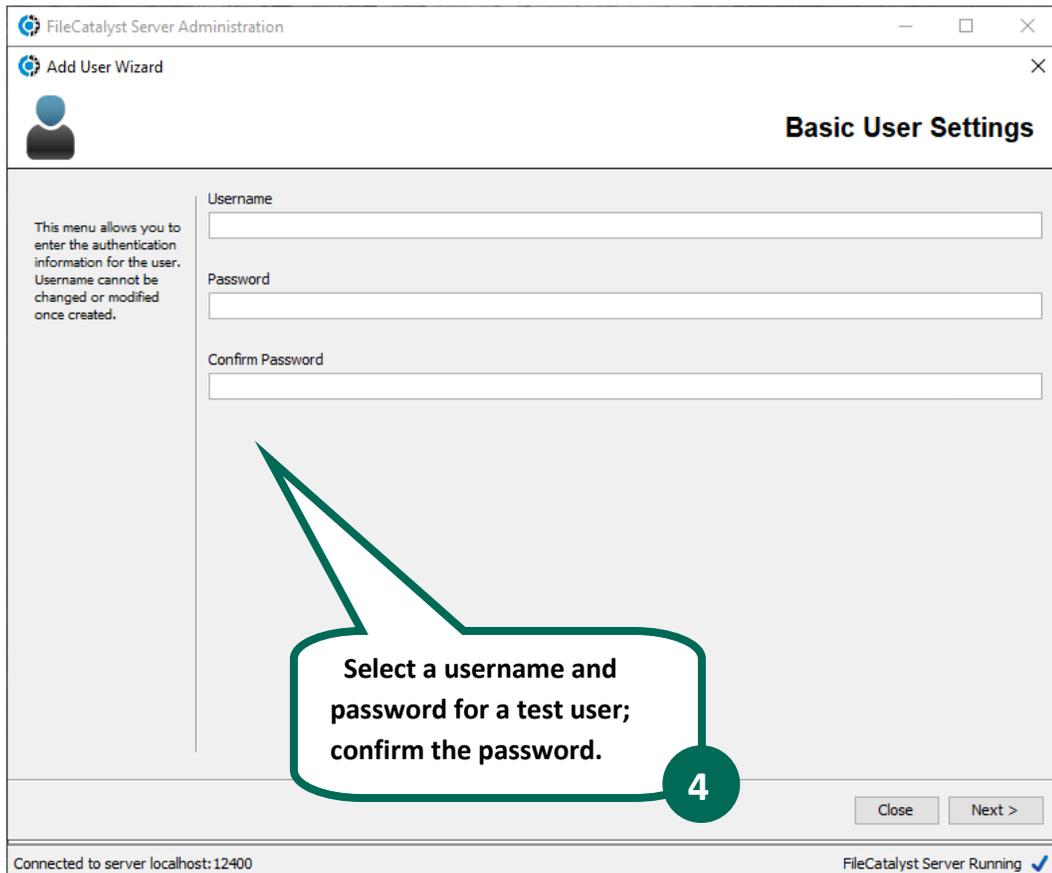
## 4 Managing Users

For the purposes of this guide, we will add our users manually. For advanced options such as using OpenLDAP or ActiveDirectory for authentication, please consult the full documentation (found in the Help menu).

### 4.1 Add a New User



The “Add User” wizard will launch:



The screenshot shows a web-based interface for adding a user. The window title is "FileCatalyst Server Administration" and the sub-window is "Add User Wizard". The main heading is "Basic User Settings". On the left, there is a user icon and a note: "This menu allows you to enter the authentication information for the user. Username cannot be changed or modified once created." The form contains three input fields: "Username", "Password", and "Confirm Password". A green callout bubble with the number "4" points to the form, containing the text: "Select a username and password for a test user; confirm the password." At the bottom right, there are "Close" and "Next >" buttons. The status bar at the bottom shows "Connected to server localhost:12400" and "FileCatalyst Server Running" with a checkmark.

FileCatalyst Server Administration

Add User Wizard

**Basic User Settings**

This menu allows you to enter the authentication information for the user. Username cannot be changed or modified once created.

Username

Password

Confirm Password

Select a username and password for a test user; confirm the password.

4

Close Next >

Connected to server localhost:12400 FileCatalyst Server Running ✓

The screenshot shows the 'Add User Wizard' window in 'User Information' mode. It features two input fields: 'Full Name' and 'E-Mail Address'. A callout bubble with the number 5 points to these fields, stating 'Optionally set the user's Full Name and email address.' Another callout bubble with the number 6 points to the 'Next >' button, stating 'Click "Next" to continue.' The window title is 'FileCatalyst Server Administration' and the subtitle is 'Add User Wizard'. The status bar at the bottom indicates 'Connected to server localhost: 12400' and 'FileCatalyst Server Running' with a checkmark.

The screenshot shows the 'Add User Wizard' window in 'Account Information' mode. It features a 'Home Directory' field with the path 'C:\Program Files\FileCatalyst Server\data\user\_001' and a 'Browse' button. Below this are two sections: 'File Permissions' and 'Folder Permissions', each with a list of checkboxes. The 'File Permissions' list includes 'Download Files', 'Upload Files', 'Modify/Overwrite Files', 'Delete Files', and 'Rename Files'. The 'Folder Permissions' list includes 'List Directories', 'Create Directories', 'Modify Directories', 'Delete Directories', and 'Rename Directories'. At the bottom, there are buttons for 'Read/Write', 'Read Only', 'Write Only', and 'Clear'. Callout bubbles with numbers 7, 8, and 9 provide instructions: 7 points to the Home Directory field ('Set a Home Directory (or use default).'), 8 points to the permission checkboxes ('Set Permissions.'), and 9 points to the 'Finish' button ('Click "Finish" to exit wizard.'). The window title is 'FileCatalyst Server Administration' and the subtitle is 'Add User Wizard'. The status bar at the bottom indicates 'Connected to server localhost: 12400' and 'FileCatalyst Server Running' with a checkmark.

Client software may now connect with the new account's username and password.

## 4.2 Editing a User

Once a user has been provisioned, several additional changes can be made to the account, including maximum bandwidth, permissions, and passwords.

The screenshot shows the FileCatalyst Server web interface. On the left is a navigation menu with items: Users, Advanced, Security, Users, Email Settings, Link, Reporting, Central Mgt, File Systems, and System Monitor. The main area is titled "User List (2)" and contains a table with two users:

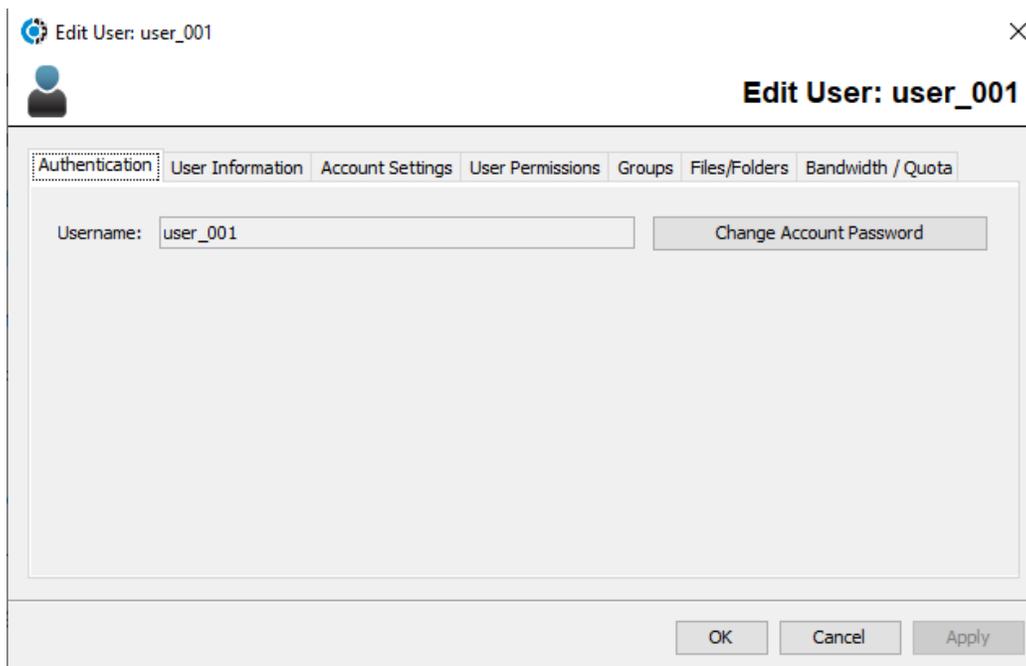
User List (2)	
<b>anonymous (Disabled)</b> Anonymous User -- C:/Program Files/FileCatalyst Server/dat...	<a href="#">Edit</a> <a href="#">Browse</a>
<b>user</b> Default User -- C:/Program Files/FileCatalyst Server/data/...	<a href="#">Connect</a> <a href="#">Delete</a> <a href="#">Edit</a> <a href="#">Browse</a>

Three callouts are present:

1. "Select 'Users' from menu" - points to the "Users" item in the left navigation menu.
2. "Make sure 'User List' tab is selected" - points to the "User List (2)" tab at the top of the main content area.
3. "Edit one of the existing users" - points to the "Edit" link for the "user" entry in the table.

At the bottom of the interface, it says "Connected to server localhost:12400" on the left and "FileCatalyst Server Running" with a checkmark on the right.

The “Edit User” options will appear:



There are five tabs used to configure settings and information. In our example scenario, you should not need to edit any settings; however, it might be useful to become familiar with the available options by flipping through the tabs:

**Authentication** — used to change the user’s password

**User Information** — update full name and email address

**Account Settings** — set the user’s home directory (full path must be provided), account expiry (disabled by default), as well as a checkbox to arbitrarily enable/disable the account

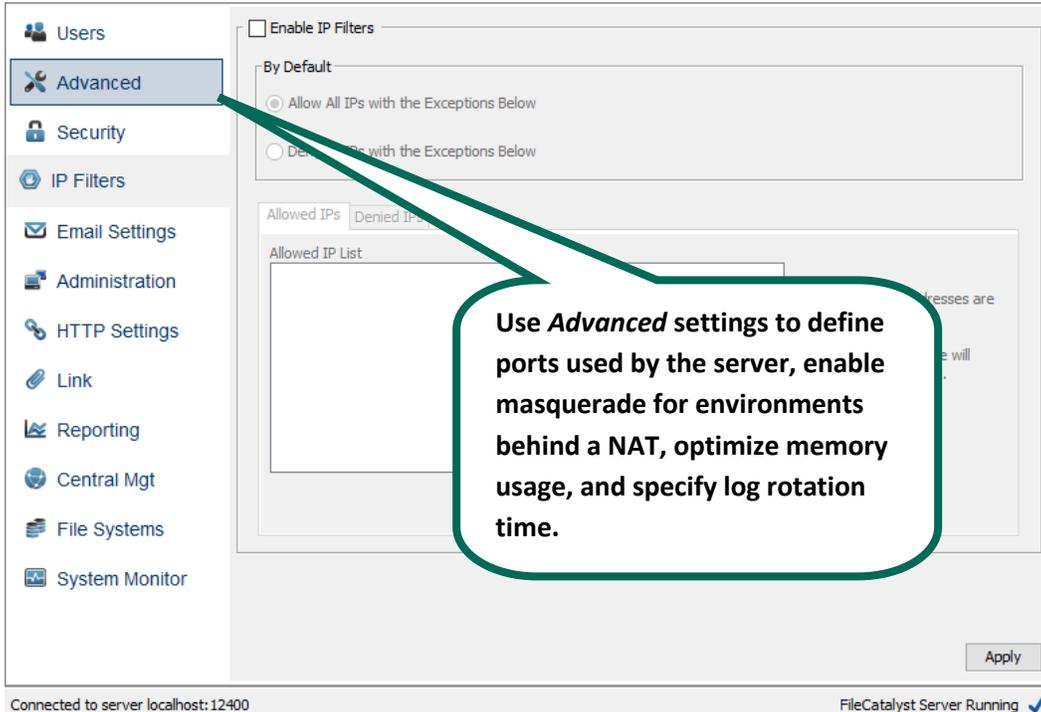
**User Permissions**— (all enabled by default) allow the administrator to limit specific users from certain file manipulation functions

**Bandwidth/Quota** — the administrator may exercise some control over the user’s data transfers.

## 5 Additional Features

Describing each of the advanced features of FileCatalyst Server is beyond the scope of this document. However, a brief overview will point new administrators in the right direction moving forward.

### 5.1 Advanced Settings



**Use *Advanced* settings to define ports used by the server, enable masquerade for environments behind a NAT, optimize memory usage, and specify log rotation time.**

Connected to server localhost:12400 FileCatalyst Server Running ✓

## 5.2 Security

The screenshot shows the 'Security' configuration panel in the FileCatalyst Server interface. The left sidebar contains navigation options: Users, Advanced, Security (selected), IP Filters, Email Settings, Administration, HTTP Settings, Link, Reporting, Central Mgt, File Systems, and System Monitor. The main panel is titled 'Connection Security' and has a sub-tab 'Password Policy'. It includes a checkbox for 'Enable AES on Data Connection'. Below this is a 'Configure SSL Port' section with 'SSL Certificate Settings'. This section contains fields for 'Certificate File' (set to C:/Program Files/FileCatalyst Server/fcservercert.pem), 'Private Key File' (set to C:/Program Files/FileCatalyst Server/fcservercert.pvk), and a 'Password' field. There are 'Generate Certificate' and 'View Certificate' buttons. A green callout box with a white background and a green border points to the 'Certificate File' field. The callout text reads: 'Use Security settings to enable SSL and/or AES and generate self-signed certificates for test environments.' At the bottom right of the panel is an 'Apply' button. The status bar at the bottom indicates 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

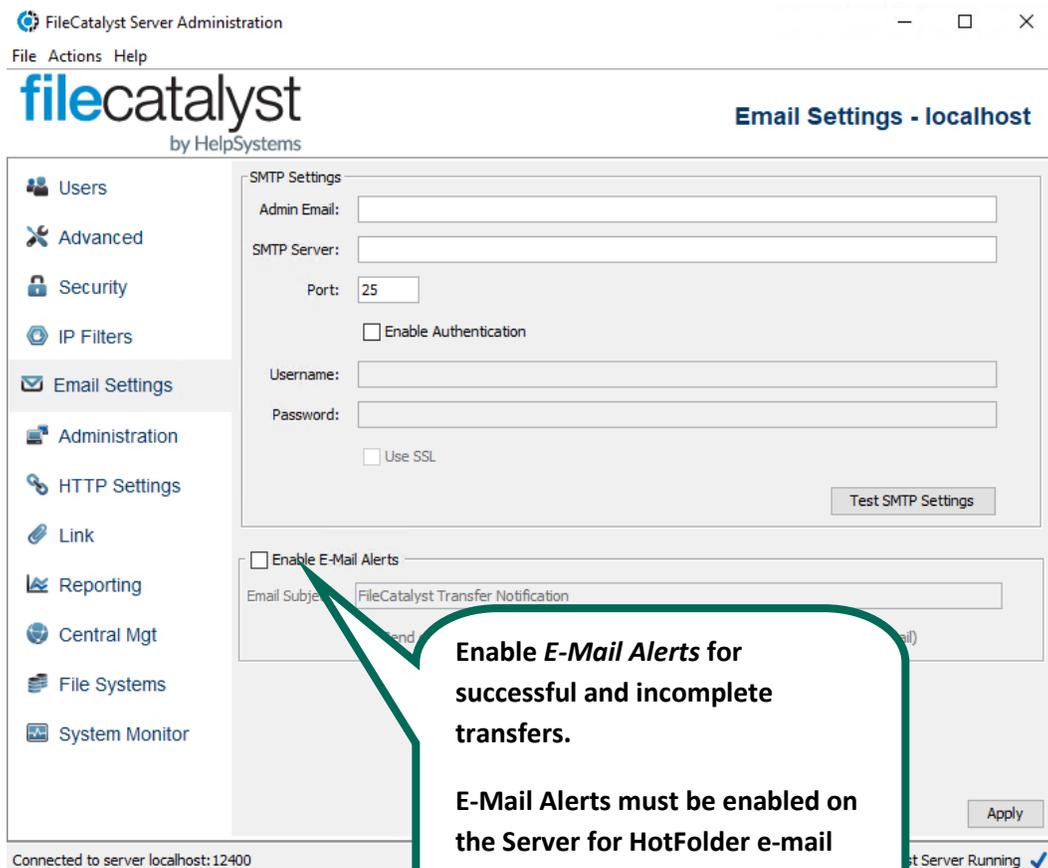
**Use Security settings to enable SSL and/or AES and generate self-signed certificates for test environments.**

## 5.3 IP Filters

The screenshot shows the 'IP Filters' configuration panel in the FileCatalyst Server interface. The left sidebar contains navigation options: Users, Advanced, Security, IP Filters (selected), Email Settings, Administration, HTTP Settings, Link, Reporting, Central Mgt, File Systems, and System Monitor. The main panel is titled 'IP Filters' and has a checkbox for 'Enable IP Filters'. Below this is a 'By Default' section with two radio buttons: 'Allow All IPs with the Exceptions Below' (selected) and 'Deny All IPs with the Exceptions Below'. There are tabs for 'Allowed IPs' and 'Denied IPs'. Below the tabs is a large empty text area for listing IP addresses. To the right of this area, text reads: 'By default, all IP addresses are PERMITTED. IP addresses listed here will ALWAYS be permitted.' At the bottom of the panel are 'Add Filter' and 'Delete' buttons. A green callout box with a white background and a green border points to the 'Allowed IPs' tab. The callout text reads: 'Allow or deny specific IP addresses using the IP Filters panel.' At the bottom right of the panel is an 'Apply' button. The status bar at the bottom indicates 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

**Allow or deny specific IP addresses using the IP Filters panel.**

## 5.4 Email Alerts



The screenshot displays the FileCatalyst Server Administration interface. The title bar reads "FileCatalyst Server Administration" and the window title is "Email Settings - localhost". The interface includes a navigation menu on the left with options: Users, Advanced, Security, IP Filters, Email Settings (selected), Administration, HTTP Settings, Link, Reporting, Central Mgt, File Systems, and System Monitor. The main content area is titled "Email Settings - localhost" and contains two sections:

- SMTP Settings:** Includes fields for Admin Email, SMTP Server, Port (set to 25), Enable Authentication (checkbox), Username, Password, and Use SSL (checkbox). A "Test SMTP Settings" button is located at the bottom right of this section.
- Enable E-Mail Alerts:** A checkbox is present, which is highlighted by a callout box. Below it is a text field for "Email Subject" containing "FileCatalyst Transfer Notification".

At the bottom of the interface, there is an "Apply" button and a status indicator that says "Server Running" with a blue checkmark. The status bar at the very bottom indicates "Connected to server localhost:12400".

**Enable E-Mail Alerts for successful and incomplete transfers.**

**E-Mail Alerts must be enabled on the Server for HotFolder e-mail notifications to function.**

## 5.5 Administration

The screenshot shows the 'Administration' settings page in the FileCatalyst web interface. The left sidebar contains navigation options: Users, Advanced, IP Filters, Email Settings, Administration (selected), HTTP Settings, Link, Reporting, Central Mgt, File Systems, and System Monitor. The main content area is titled 'Administration Settings' and includes sections for 'Remote Administration' and 'Admin Account'. The 'Remote Administration' section has checkboxes for 'Enable Remote Connections' (unchecked), 'Enable HTTP Remote Administration' (checked), and 'Force authentication' (unchecked). The 'Admin Account' section has a 'Username' field and a 'Set Admin Password' button. The 'Read-Only Admin Account' section also has a 'Username' field and a 'Set Read-Only Admin Password' button. A callout box with a green border and arrow points to the 'Enable HTTP Remote Administration' checkbox, containing the text: 'Use Administration to enable remote connections and set an admin or read-only admin password.' The status bar at the bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

## 5.6 HTTP Settings

The screenshot shows the 'HTTP Settings' page in the FileCatalyst web interface. The left sidebar contains navigation options: Users, Advanced, Security, IP Filters, Email Settings, Administration, HTTP Settings (selected), Link, Reporting, Central Mgt, File Systems, and System Monitor. The main content area is titled 'General Settings' and includes sections for 'HTTP Config' and 'Access Links'. The 'General Settings' section has checkboxes for 'Enable HTTP Transfers' (unchecked), 'Enable Link' (unchecked), and 'Use SSL' (unchecked). The 'HTTP Config' section has a dropdown for 'Access IP' (set to 127.0.0.1) and a checkbox for 'Bind all interfaces' (unchecked). The 'Web Port' is set to 12480. The 'Access Links' section shows 'Webroot: http://127.0.0.1:12480', 'Servlet: http://127.0.0.1:12480/servlet/ftpservlet', and 'Link: http://127.0.0.1:12480/ta/link'. A 'Hint: Click' link is also visible. The 'Web Server Integration' section has a note: 'Allows for integration with 3rd party web servers. Note that this will prevent the standard web server from running.' and a checkbox for 'Enable AJP Connector' (unchecked). A callout box with a green border and arrow points to the 'Enable HTTP Transfers' checkbox, containing the text: 'Use HTTP Settings to enable HTTP Transfers, Link, and SSL. Additionally, HTTP Settings is used to enable web administration functionality for users.' The status bar at the bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

## 5.7 Link

Connected to server localhost:12400 FileCatalyst Server Running ✓

## 5.8 Reporting

Connected to server localhost:12400 FileCatalyst Server Running ✓

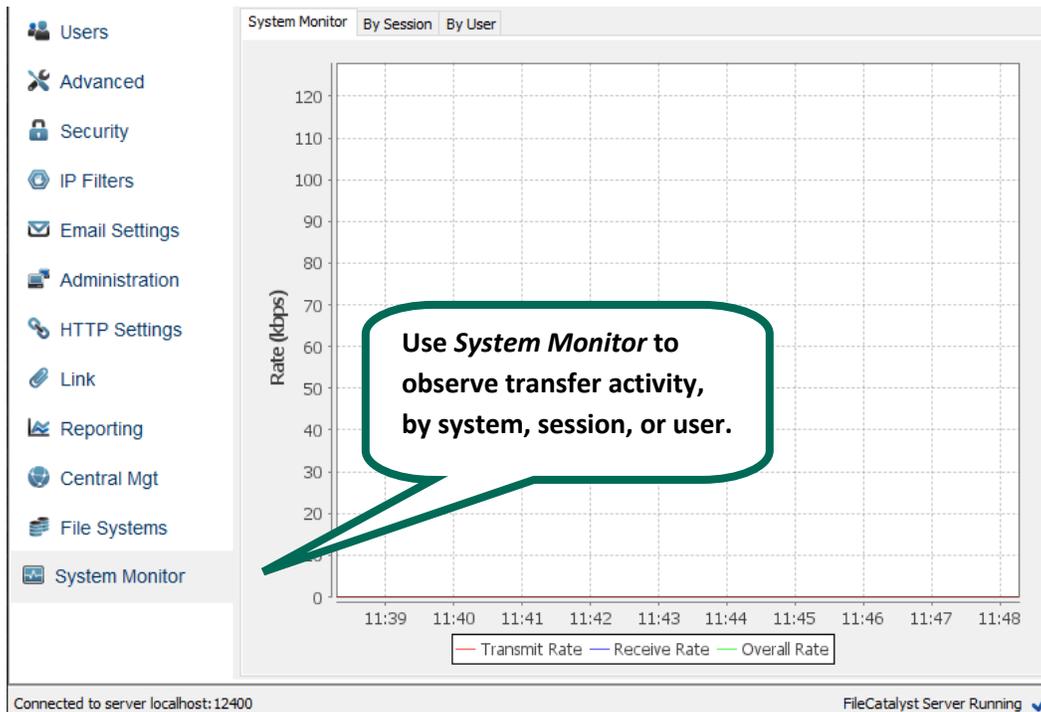
## 5.9 Central

The screenshot shows the 'Central Mgt' configuration page. On the left is a navigation menu with items: Users, Advanced, Security, IP Filters, Email Settings, Administration, HTTP Settings, Link, Reporting, Central Mgt (highlighted), File Systems, and System Monitor. The main area contains a checkbox 'Enable remote monitoring of service' which is unchecked. Below it is a warning: 'This will enable and lock Reporting if required and start the HTTP server for local access if it is not currently running'. There are two sections: 'Central' with fields for Address (127.0.0.1), Port (12500), User (monitor), and Password (masked with dots); and 'FC Server' with fields for IP (127.0.0.1), Hostname (127.0.0.1), and Alias (Server Alias). A green callout bubble points to the 'FC Server' section with the text: 'Enable Central Management (requires Central to be deployed) allows alarms and session information to be sent to Central.' At the bottom right is an 'Apply' button. The status bar at the bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

## 5.10 File Systems

The screenshot shows the 'File Systems' configuration page. The left navigation menu is the same as in the previous screenshot, with 'File Systems' highlighted. The main area has a '+ New' button and a search bar containing 'Local Files'. A green callout bubble points to the 'File Systems' menu item with the text: 'Use File Systems to add external file systems such as Dropbox, Encrypted folders, Google Cloud Storage, and many others.' The status bar at the bottom shows 'Connected to server localhost:12400' and 'FileCatalyst Server Running' with a checkmark.

## 5.11 System Monitor



If you will be proceeding to the HotFolder QuickStart, you might wish to leave the FileCatalyst Server Administration Client opened to this pane to test monitoring the system.

## 6 Next Steps

By the end of this guide, you should have successfully completed steps allowing you to:

- install FileCatalyst Server
- run FileCatalyst Server as a standalone application
- license the application
- create a test user account

You may now move to the HotFolder QuickStart guide. If you are using Windows, you may wish to set FileCatalyst Server to run as a service. You may also wish to take this opportunity to explore the user documentation and learn about FileCatalyst Server's advanced features.

## 7 Support

Looking for help? We're committed to helping you resolve any issues with your file transfer solutions so you can get back to business. If you've run into an issue, our experienced support

team can quickly help you resolve it. And if you need assistance finding product downloads or manuals, we can point you in the right direction.

Available services include:

- Submitting a trouble ticket:
  - To submit a trouble ticket to our Support team, please log in to the [Customer Portal](#), click Support from the top menu bar, and Submit New Case.
- Sending an email:
  - For assistance, send an email to [support.filecatalyst@helpsystems.com](mailto:support.filecatalyst@helpsystems.com)

You can also:

- Search the [Knowledge Base](#) for solutions to common questions
- Contact us at: +1(613) 667-2439 or +1 (877) 327-9387 (toll-free in Canada and USA)