

Xiant Filer™ User Guide for Outlook 2003 and 2007



Xiant Filer is an add-in for Microsoft Office Outlook® that helps you more efficiently manage your e-mail. Filer uses a powerful algorithm that learns your filing habits and recommends folders in Outlook where you are likely to file a selected message, allowing you to file e-mail with a single click.

Filer also offers a *Topics* feature that allows you to actively monitor a subset of e-mail from your larger mailbox. Each Topic watches for and collects only messages from targeted e-mail threads, so you can create a Topic and use it as an alternative to the inbox to stay focused on important e-mail.

Filing e-mail

Filer is completely integrated with Outlook, so you can use it to move messages from the Outlook window or from an opened message window.

An optional automatic filing feature is also available to Outlook 2007 users. This feature moves messages that arrive in the inbox from a specific sender to a destination folder following a configurable delay.

Available filing actions

Filer offers a number of distinct filing actions:



Move message, which moves only the selected message.



Move thread, which moves the conversation thread associated with the selected message.

A *move previous* variation of this action is also available, which moves all messages in the thread that were received prior to the selected message.



Move from sender, which moves all messages from the sender of the selected message.

A *move previous* variation is also available for this action, which moves all messages from the sender received prior to the selected message.

Filing from the Microsoft Office Outlook® window

Filer offers three ways to file e-mail from the Outlook window:

- The Xiant Filer toolbar,
- The message shortcut menu, available by right-clicking a message (unavailable in Outlook 2003), and
- The **Xiant Filer** menu.

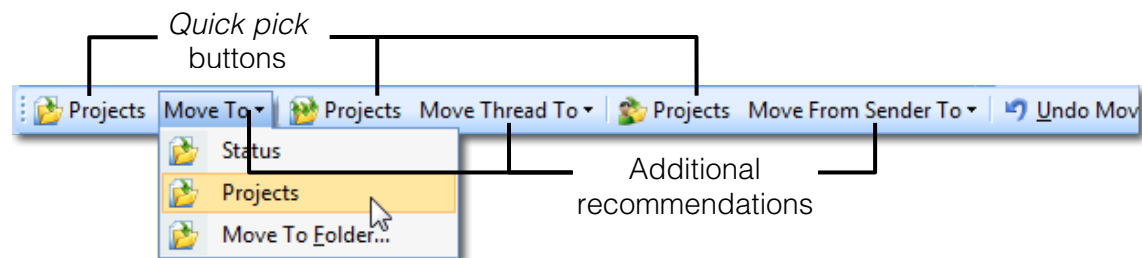
Using the Xiant Filer toolbar

Use the Xiant Filer toolbar in the Outlook window to quickly file messages. As you select messages in the Outlook message list, Filer's most highly recommended folder appears as a *quick pick* button for each filing action.

- Click a *quick pick* button to move the selected messages to that folder.
- Click a *Move to* button to view additional recommendations for each filing action.

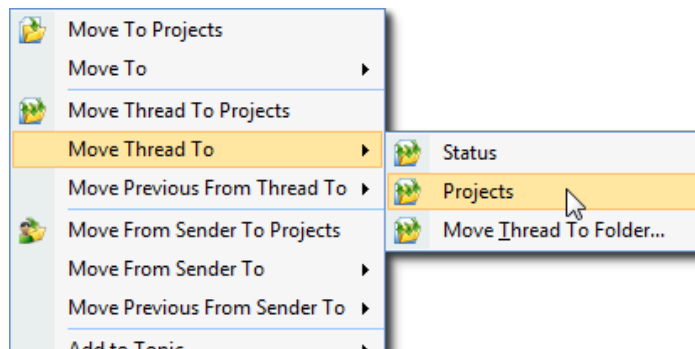
If Filer doesn't recommend any folders — or if you don't like any of the recommendations — click the last remaining *Move* command to quickly choose a different folder (see “Choosing your own folder” on page 4).

You can optionally customize the number of *quick picks* as well as the filing actions displayed on the toolbar. See page 12 for more information.



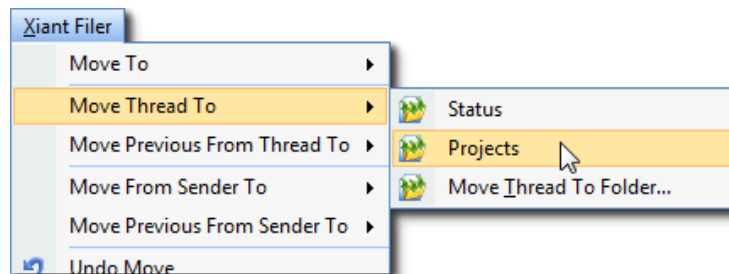
Right-clicking a message (Outlook 2007 only)

As an alternative to the Xiant Filer toolbar, right-click a message in the message list to access Filer's *move* commands. Filing actions and folder recommendations largely mirror those found on the toolbar: *quick pick* recommendations appear for each filing action, followed by a sub-menu with additional recommendations.



Using the *Xiant Filer* menu

Each filing action is also available from the **Xiant Filer** menu. Select a command to view folder recommendations; select a folder to move the messages.



Outlook window filing tips

- Simultaneously move multiple message threads by selecting at least one message from each targeted thread prior to selecting your destination folder. The same method applies when filing by sender.
- With multiple messages are selected in the message list, Filer's folder recommendations are based upon the selected message closest to the top of the list.
- Optionally, include messages from the "Sent Items" folder when moving a message thread. You can make this the standard filing behavior on the **Xiant Filer Options** dialog (see page 11).
- On the **Xiant Filer Options** dialog, you can customize several aspects of the Xiant Filer toolbar and shortcut (right-click) menu:
 - Choose which filing actions (for example: move thread, move previous from thread, and move all from sender) you want to display; all filing actions are displayed by default.
 - Change the number of *quick picks* that can appear for each enabled filing action. You might display additional quick picks to increase your likelihood of filing selected messages with a single click. Alternatively, decrease the number of quick picks to conserve space on the toolbar.

For more information about how to customize Filer, see page 12.

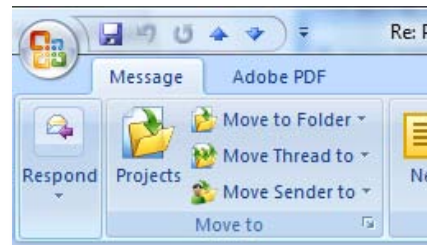
Filing from an opened message window

Filing from an opened message window will vary slightly based upon which version of Outlook you are using.

Outlook 2007 users

From an opened message window in Outlook 2007, use controls in the **Move to** box on the **Message** tab of the Ribbon to file the opened message.

- Click a *quick pick* recommendation to file the displayed message; additional recommendations may be available from a secondary **Move to Folder** control.
- Additional filing actions — **Move Thread** and **Move Sender** — are also available as secondary move controls.

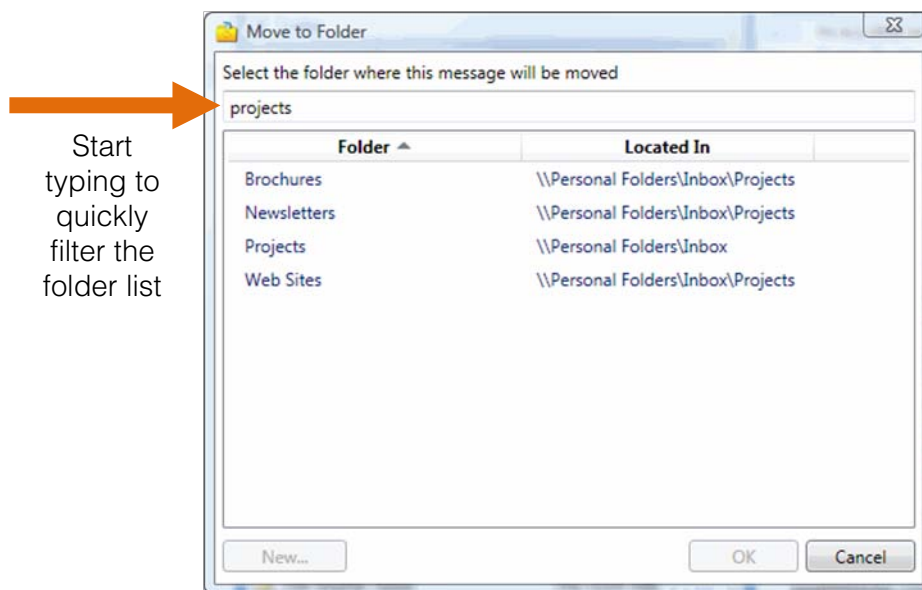
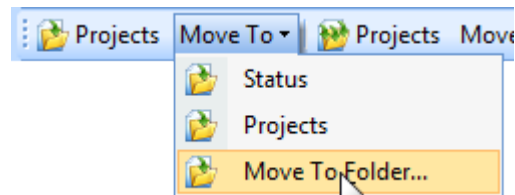


Outlook 2003 users

In Outlook 2003, use the **Xiant Filer** toolbar in the message window, which resembles the toolbar of the same name from the Outlook window.

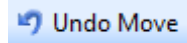
Choosing your own folder

If Filer doesn't recommend any folders — or if you don't want to use Filer's recommendations — select the last *Move to* command for any of the available filing actions to display a custom dialog that allows you to quickly find and choose your own destination folder.



Undoing a move

If you discover that you used Filer to move messages to the wrong folder, you can undo the previous move by clicking **Undo Move** on the toolbar. Note that Filer tracks only a single level of filing history.



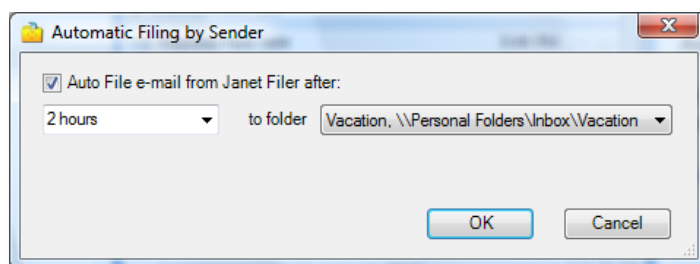
Automatically filing messages by sender

Filer includes an optional feature that automatically moves messages that arrive in your inbox from a particular sender to a designated folder. You may specify a delay prior to filing or request that messages be filed immediately.

Before using this feature, you must first enable it on the **Xiant Filer Options** dialog (see page 11). Note that this feature is only available if you are using Outlook 2007.

Setting up automatic filing

1. From the Outlook message list, select a message from the sender whose messages you want to automatically file.
2. From the **Xiant Filer** menu, select **Automatic Filing by Sender**.
3. On the **Automatic Filing by Sender** dialog, select the **Auto File e-mail** check box, define the filing rules, and then click **OK**:
 - o Define a filing delay.
 - o Choose a destination folder. Filer may recommend folders based upon your history of filing messages from the sender; choose a recommended folder or select **Move to Folder** to browse for one.



Disabling automatic filing

- To disable automatic filing for all senders, open the **Xiant Filer Options** dialog and clear the **Automatic filing by sender** check box from the **Automatic Filing** area on the **Message Filing** tab.
- To disable automatic filing only for a particular sender, select a message from the sender in the Outlook message list, choose **Automatic Filing by Sender** from the **Xiant Filer** menu, clear the **Auto File** check box, and then click **OK**.

Working with Topics

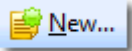
Use Filer's Topics feature as an alternative means of organizing and monitoring your e-mail. Each Topic appears as a small window that resembles a sticky note and collects e-mail messages from targeted message threads (conversations) in Outlook.

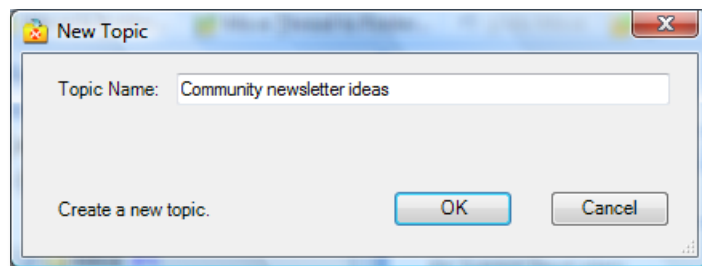
You might create a Topic, add to it messages from conversation threads that pertain to a particular subject, and then use the Topic as an alternative to your inbox to monitor correspondence related to that subject.

If you aren't interested in Topics, you can disable the feature on the **Topics** tab of the **Xiant Filer Options** dialog (see page 13). Disabling Topics prevents Topic-related elements of the Filer user interface from appearing.

Creating a Topic

The quickest way to create a Topic is by using the Xiant Toolbar:

1. In the Outlook message list, select a message from the thread you would like to track and then click  on the toolbar. Note that only e-mail message can be added to a Topic; you cannot add other items such as tasks, contacts, or meeting invitations.
2. Name your Topic and then click **OK**.
By default, Filer uses the message subject text as the Topic name; however, you can change this if you like. Note that you cannot change the name of a Topic after it has been created.



After you create the Topic, it appears in its own window and displays the selected message. Filer soon searches your mailbox – including your “Sent Items” folder – for other messages in the thread and adds them to the Topic as well.

As with Filer's move commands, there are alternative methods for creating a Topic:

- Right-clicking a message in the Outlook message list (Outlook 2007 only)
- Opening a message, then using **Topics** controls on the message window Ribbon (for Outlook 2003, use Topic control on the message window toolbar)

About the Topic window

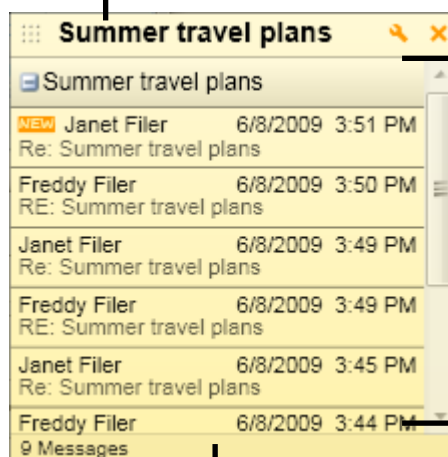
A Topic appears on the screen in its own window and displays the messages it has collected from watched message threads.

Topic title bar

To move a Topic on the screen, drag it by its title bar or its status bar.

Click the wrench menu to change Topic color, delete the Topic, or move the Topic's messages to an Outlook folder.

Click the  button to hide the Topic.



Message list

Displays the messages tracked by the Topic, grouped by thread.

Double-click a message to open it.

The  icon appears adjacent to each unread message.

Status bar

Showing and hiding Topics

Topic windows can be shown or hidden. Even when hidden, a Topic continues to track and collect message from the threads it is monitoring. Shown Topics are displayed on the screen only when the Outlook window is also displayed:

- Minimizing the Outlook window hides any shown Topics; restoring the minimized Outlook window also restores each shown Topic.
- When starting Outlook, all Topics are hidden by default.


Showing/hiding all Topics

- To show all available Topics, click the **Topics** button on the Xiant Filer toolbar and select **Show All**.
- To quickly hide all Topics, click the **Hide All** button on the toolbar.

Showing/hiding particular Topics


- To show a particular Topic, click the **Topics** button on the Xiant Filer toolbar and select the Topic by name.

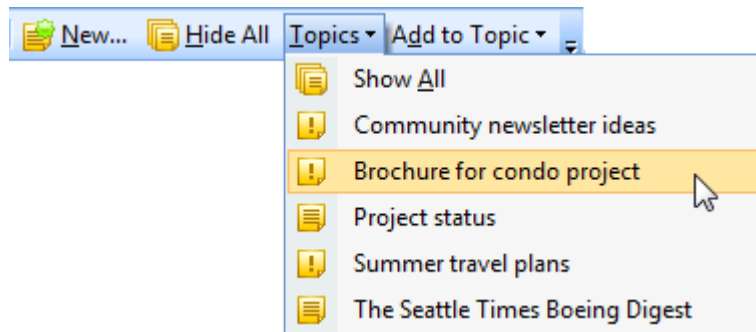
Note that if the Topic was stacked when it was last shown, it may appear in a stack once again.

- To hide a Topic, click  in its title bar.

Monitoring messages from a Topic

When a Topic is shown, a **NEW** icon appears next to new or unread messages. You may also notice a flash effect on the Topic window after new messages arrive. Double-click a message to open it directly from the Topic window.

For Topics that are not shown, you can quickly check which Topics contain new messages by clicking the **Topics** button on the Xiant Filer toolbar. If a Topic contains new messages, a  icon appears next to its name.



Arranging Topics

When Topics are shown, you can arrange them on the screen to your liking. When you show a Topic window, it should appear in roughly the same position and size from the previous time it was shown.

Moving and resizing

- To move a Topic on the screen, drag it by either its title bar or status bar to a new position.
- To resize a Topic, click and drag the perimeter of the Topic window.

Changing color

To change the color of a displayed Topic, select **Change Color** from the Topic's wrench menu. Note that you cannot select a specific color; instead, Filer toggles the color among a handful of available choices.


Docking

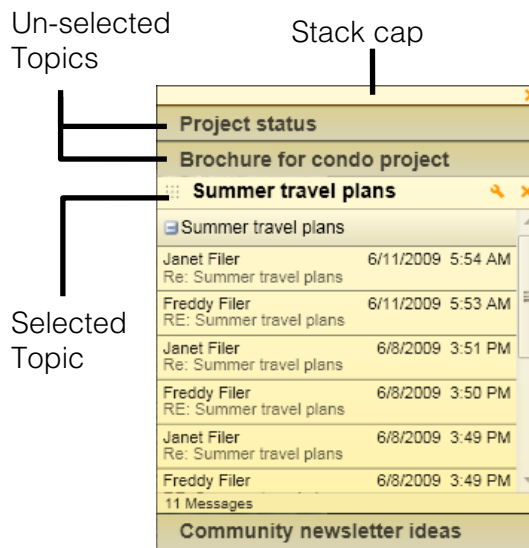
You can dock a Topic to the outer perimeter of the Outlook window. A docked Topic remains fixed in its relative position on the perimeter of the window as you move and resize the Outlook window. Filer may also dock Topics automatically when you show them.

- To dock a Topic, move its window close to the perimeter of the Outlook window (it will snap into place).
- To undock a Topic, move it away from the Outlook window.

Stacking Topics

You can stack shown Topics to conserve space on the screen. The message list is displayed only for the selected Topic in the stack. A stack can be moved, resized, and docked.

- To stack Topics, drag one Topic on top of another Topic (or stack of Topics).
- To select a Topic in the stack, click its title bar.
- To remove a Topic from a stack, move the Topic off of the stack by dragging its title bar.
- To resize the stack, drag the perimeter of the stack.
- To close the entire stack, click the  button; closing a stack closes all Topics in the stack.



Managing Topics

You can add message threads to be monitored by a Topic, remove messages from a Topic, delete a Topic, or move the messages contained in a topic to an Outlook folder.

Adding a message thread

A Topic can monitor multiple message threads. Add a message to a Topic to start tracking its conversation thread. After you add the message, Filer searches your mailbox for other messages that are part of the thread and adds them to the Topic for you.

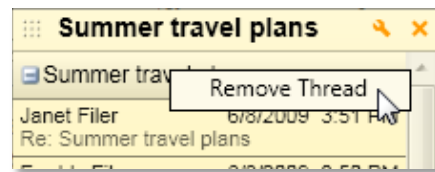
To add a new message thread to a Topic:

- If the Topic is shown, simply drag a message to the Topic window.
 - Optionally, right-click-and-drag the message to the Topic and then choose **Add Single Message** if you are already caught up on a message thread and want the Topic to track only newer messages.
- Alternatively, you can also add a message thread to a Topic by:
 - Selecting a message from the thread in the Outlook message list and using either the **Add to Topic** button on the Xiant Toolbar or by right-clicking the message (Outlook 2007 only).
 - Opening a message and, from the **Message** tab of the Ribbon, clicking **Add to Topic** from the **Topics** box, and clicking a Topic. If using Outlook 2003, instead click the **Topics** buttons on the toolbar of the **Xiant Filer** toolbar in the message window and select a Topic.

Removing messages

You can remove messages from a Topic individually or by thread by right-clicking either a message or a thread header and selecting a *Remove* command.

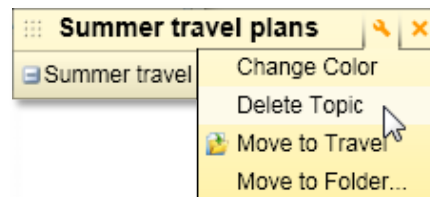
After you remove a thread, the Topic no longer monitors and collects messages from the thread.



Deleting a Topic

To delete a Topic, show it and then select **Delete Topic** from the wrench menu.

Note that deleting a Topic does not delete its messages in Outlook.



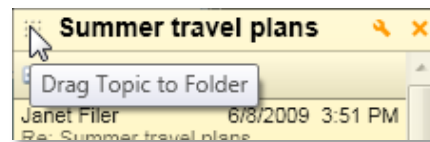
Filing messages from a Topic

You can quickly move the messages collected by a Topic to a folder in Outlook. If you are finished with the Topic, you can also have Filer delete it after the move.

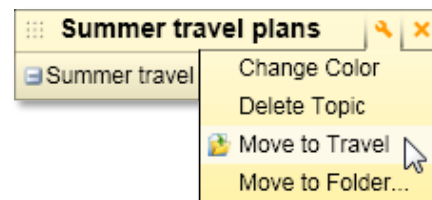
To file the messages in a Topic to a folder:

1. Use one of two methods to initiate the move. If you use the wrench menu, Filer may recommend likely destination folders.

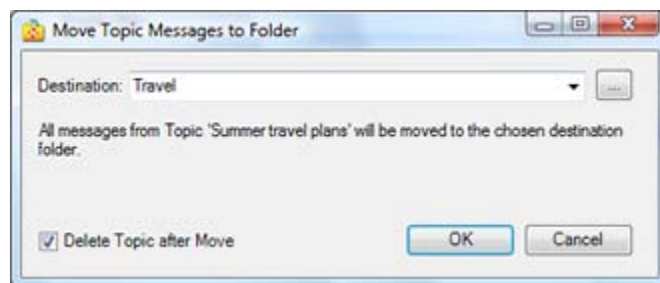
- Drag the Topic by the upper-left area of its title bar to an Outlook folder, or



- From the wrench menu of a displayed Topic, either choose a suggested folder or select **Move to Folder** to browse for or create a destination folder (see “Choosing your own folder” on page 4).



2. Filer prompts you to confirm the move. If you want the Topic to continue monitoring message threads, clear the **Delete Topic after Move** check box before clicking **OK** to proceed with the move.



Changing Xiant Filer™ behavior

Open the **Xiant Filer Options** dialog from the **Xiant Filer** menu to change Filer's behavior and customize its user interface.

Message filing behavior

Click the **Message Filing** tab to change folder recommendation and filing behavior.

Filing behavior section

- **Include Deleted Items folder in filing recommendations** check box

By default, Filer does not recommend Outlook system folders such as "Sent Items" and "Deleted Items". If you use the "Deleted Items" folder in your workflow as an archive, select this check box so that this folder is included in Filer's recommendations.

- **Include Sent Items when filing message threads** check box

Select this check box to include your sent messages when moving a conversation thread if they were part of the conversation.

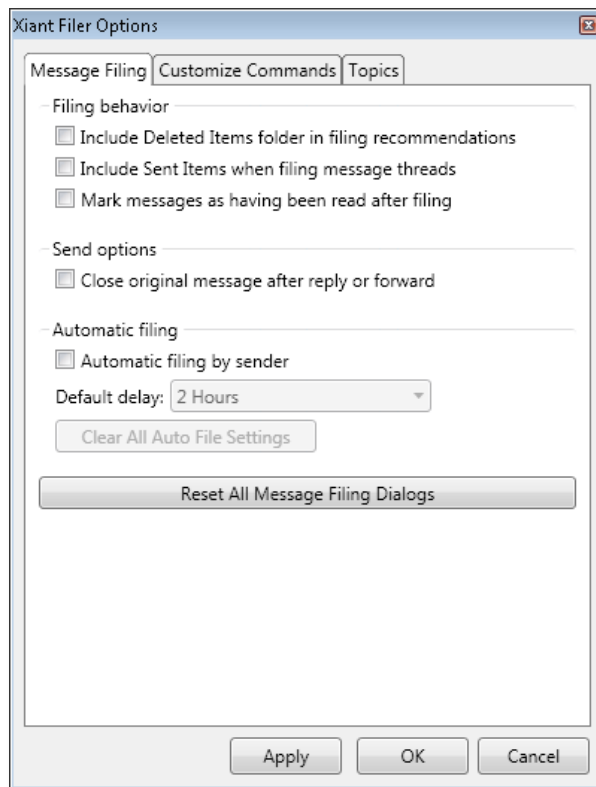
- **Mark messages as having been read after filing** check box

Select this to have Filer mark each message it moves as having been read.

Send options section

Select the **Close original message after reply or forward** check box for Filer to close an opened message window after you *send* a reply to the message or forward the message. Contrast this with the optional auto-close feature in Outlook that closes the message after you *initiate* the reply or forward.

Note: To use Filer's auto-close feature, you first need to ensure that Outlook auto-close is disabled: select **Options** from the **Tools** menu, click the **E-mail Options** button, and make sure that the **Close original message on reply or forward** check box is cleared.



Automatic filing section

Note that this section does not appear for Outlook 2003 users.

- **Automatic filing by sender** check box
 Select this check box to enable the automatic filing feature, which allows you to create auto-file rules for messages received in the inbox from particular senders. See page 5 for more information about this feature.
- **Default delay** list
 This list value defines the default delay that appears in the feature dialog when you set up automatic filing for a user for the first time.
- **Clear All Auto-File Settings** button
 Click to purge all sender-to-folder filing associations.

Mailbox and data file exclusions section

This section lists each available mailbox and Personal Folders file (.pst). Clear a selection to prevent Filer from recommending folders in a mailbox or .pst. Only the default mailbox and any delegate mailboxes are required.

Reset All Message Filing Dialogs button

Click to re-enable all of the filing-related dialogs that you might have dismissed previously by selecting a **Remember and do not ask again** check box.

Filer user interface

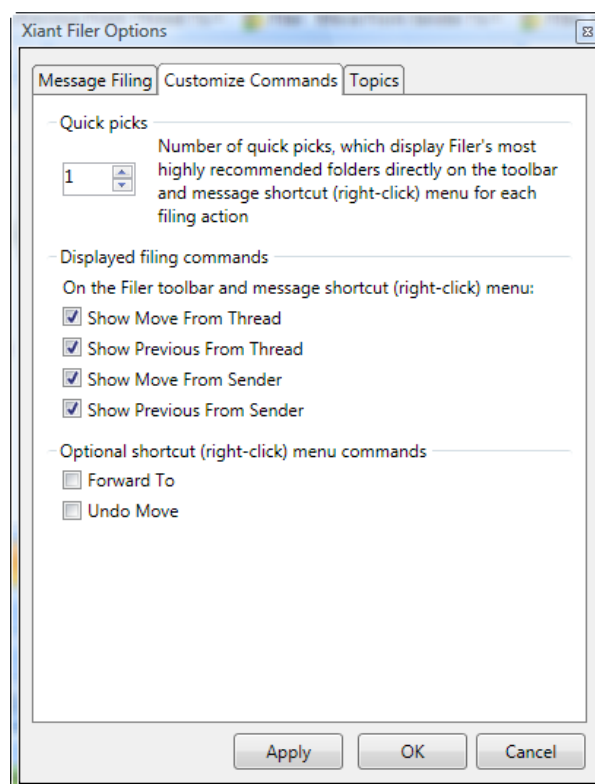
Click the **Customize Commands** tab to change the appearance of the Xiant Filer toolbar and the message shortcut menu.

Quick picks section

Use the box to customize the number of quick picks that appear on the toolbar and the message shortcut menu for each enabled filing action. By default, the number of quick picks is 1.

Displayed filing commands section

Use these check boxes to control which Filer commands show up in the shortcut menu that appears when you right-click a message. The **Forward To** command appears for a selected message



only if you previously forwarded messages from the sender. This allows you to quickly forward messages to frequent recipients of your forwarded messages.

Note that this section does not appear for Outlook 2003 users.

Available Filing Actions section

Use these check boxes to display only the filing actions that you want to be available on the Filer toolbar and the message shortcut menu, which appears when you right-click a message. Only the *move message* filing action is required to be displayed.

Note that these check boxes do not affect the filing actions available on the **Filer** menu or an opened message window.

Topics behavior

Click the **Topics** tab to change the Topics display behavior or to disable Topics entirely.

Enable Topics check box

Clear this check box if you don't use Topics and want to prevent Topic-related aspects of the Filer user interface from appearing.

This check box is selected by default.

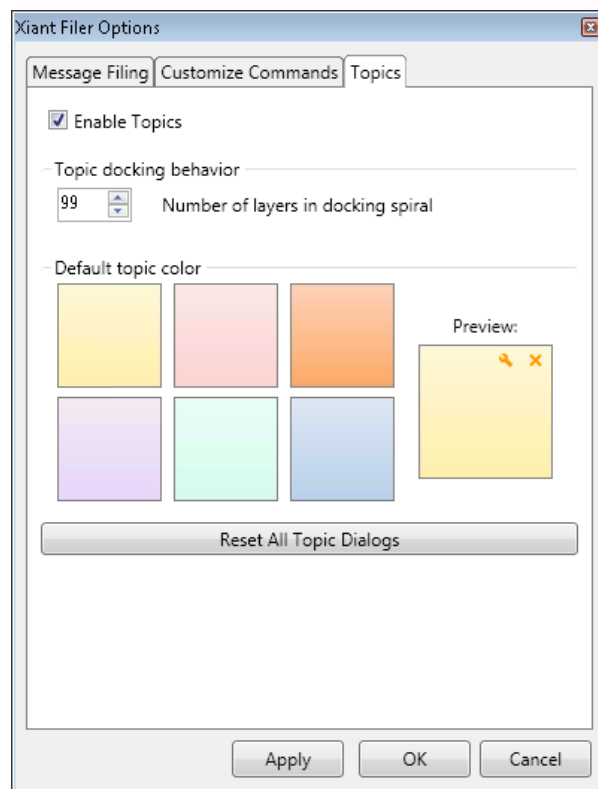
Topic docking behavior section

When you show all Topics, Filer docks them to perimeter of the Outlook window, spiraling Topics around the window in a clockwise fashion. This setting defines the number of layers of Topics around the Outlook window that Filer attempts to display before it begins to automatically stack Topics.

The default value of *99* ensures that Filer displays topics on as much of the screen as possible. Reduce the number of layers if you prefer Filer to stack Topics instead.

Default Topic color section

This defines the default Topic window color that Filer assigns to newly created Topics.



Reset All Topics Dialogs button

Click to re-enable all of the Topic-related dialogs that you might have dismissed previously by selecting a **Remember and do not ask again** check box.

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