

Xiant Filer™ User Guide for Outlook 2010



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. This feature moves messages that arrive in the inbox from a specific sender to a destination folder after 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

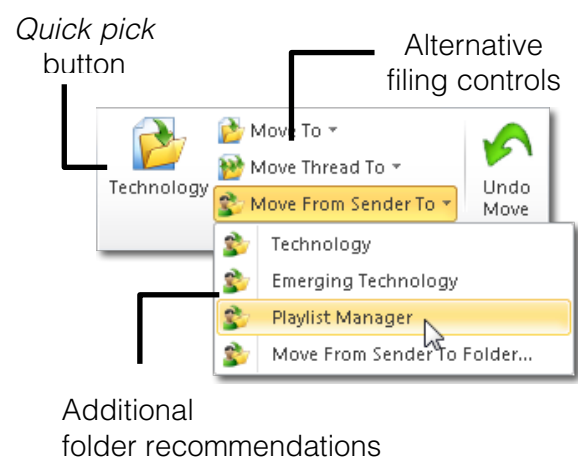
Filer offers two ways to file e-mail from the Outlook window:

- Filer controls on the Ribbon, and
- The message shortcut menu, available by right-clicking a message.

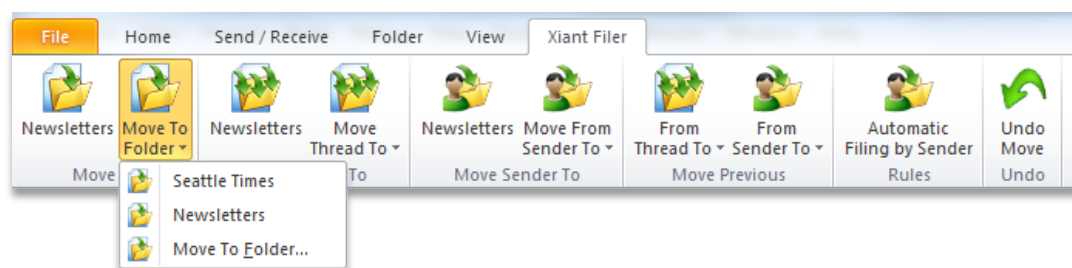
Filing from the Ribbon

Use Xiant Filer controls on the Ribbon of 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 on the **Home** tab of the Ribbon.

- Click a *quick pick* button to file the selected message to that folder. Additional folder recommendations may also be available from a secondary **Move to** control.
- Alternative filing actions, for *move thread* and *move sender*, are also available as secondary move controls.
- If Filer doesn't recommend any folders — or if you don't like any of the recommendations — click the last remaining *Move* command from one of the alternative filing controls to quickly choose a different folder (see "Choosing your own folder" on page 4).



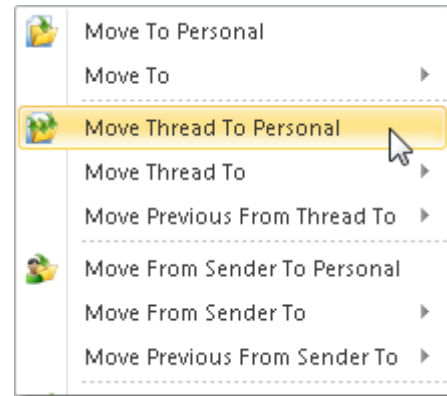
Additional filing actions, including *move previous* variations by thread and by sender, are available on the **Xiant Filer** tab. You can optionally customize the number of *quick picks* as well as which filing actions are displayed on this tab. See page 12 for more information.



Right-clicking a message

As an alternative to the Ribbon, you can also 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 **Xiant Filer** tab: *quick pick* recommendations appear for available filing action, followed by a sub-menu with additional folder recommendations.



Outlook window filing tips

- Simultaneously move multiple message threads by first selecting at least one message from each targeted thread prior to choosing your destination folder. You can do the same thing when filing by sender.
- With multiple messages 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 Ribbon controls and shortcut (right-click) menu:
 - Choose which filing actions to display on the **Xiant Filer** tab and the shortcut menu; all filing actions are displayed by default.
 - Change the number of *quick picks* that can appear. You might display additional quick picks to increase the likelihood of filing selected messages with a single click. Alternatively, decrease the number of quick picks to conserve space on the Ribbon.

More information about customizing Filer can be found on page 12.

Filing from an opened message window

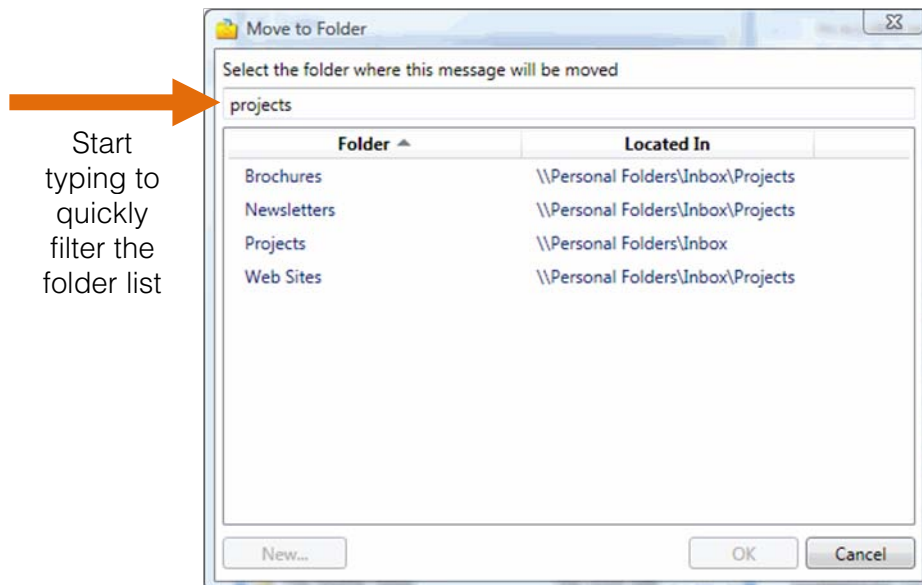
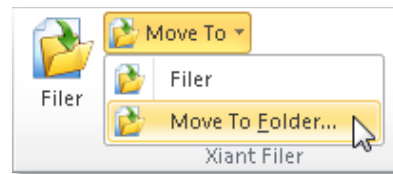
From an opened message window, use controls in the **Move to** group on the **Message** tab to file the opened message.

- 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.



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 either the **Home** or **Xiant Filer** tabs in the Outlook window.

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.

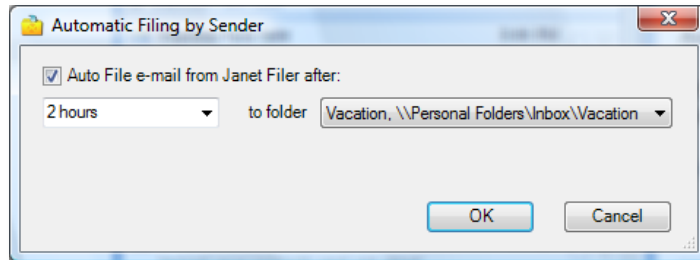
Before using the automatic filing feature, you must first enable it on the **Xiant Filer Options** dialog (see page 11).

Setting up automatic filing

1. From the Outlook message list, select a message from the sender whose messages you want to automatically file.

2. On the **Xiant Filer** tab, click **Automatic Filing by Sender**. If this button doesn't appear, you may need to enable the feature (see page 11).
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 on the **Message Filing** tab clear the **Automatic filing by sender** check box.
- To disable automatic filing only for a particular sender, select a message from the sender in the Outlook message list, on the **Xiant Filer** tab click **Automatic Filing by Sender**, 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

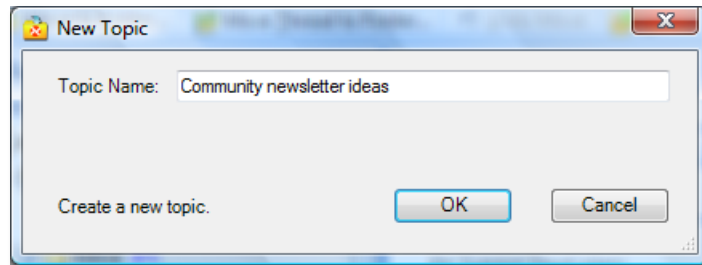
The quickest way to create a Topic is by using the Ribbon:

1. In the Outlook message list, select a message from the thread you would like to track, then on the **Xiant Filer** tab click **New Topic**.

Note that only e-mail message can be added to a Topic; you cannot add other items such as tasks, contacts, or meeting invitations.

- 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-click a message in the Outlook message list, or
- Open a message and then use **Topics** controls on the message window Ribbon.


About the Topic window

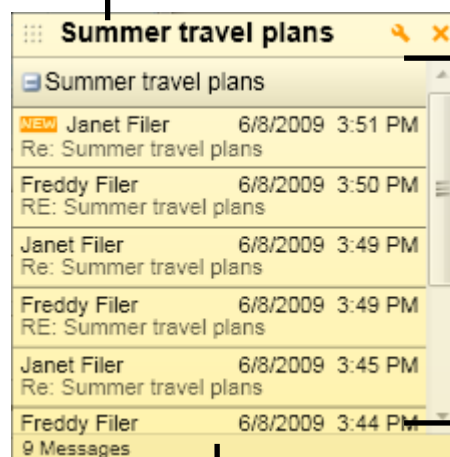
A Topic appears on the screen in its own window and displays the messages it has collected from watched message threads.

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.

A  icon appears next to a message if it is new or unread.

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.

You can show and hide Topics from the **Xiant Filer** tab of the Outlook window.

Showing/hiding all Topics

- To show all available Topics, click the **Show** button and then click **Show All**.
- To quickly hide all Topics, click the **Hide All** button.

Showing/hiding particular Topics


- To show a particular Topic, on the **Xiant Filer** tab click the **Show** button and then select the Topic by name.

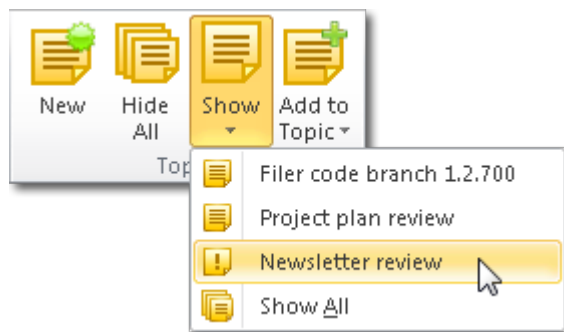
Note that if the Topic was stacked when it was last shown, it may appear in a stack once again.

- To hide a shown 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 from the **Xiant Filer** tab on the Ribbon by clicking the **Show** button. 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

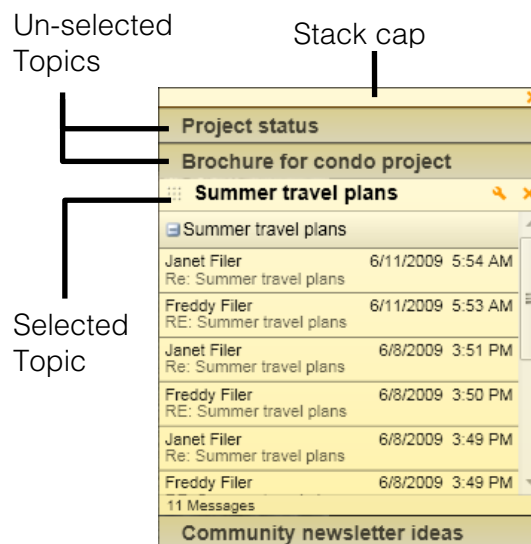
You can dock a Topic to the outer perimeter of the Outlook window. A docked Topic remains fixed in its relative position on the perimeter of the window as you move and resize the Outlook window. Filer may also dock Topics automatically when you show them.

- 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 from that thread to the Topic window.

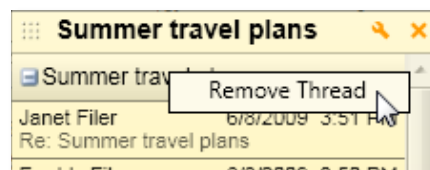
If you are already caught up on a message thread and want the Topic to track only newer messages, right-click-and-drag the message to the Topic and then choose **Add Single Message**.

- Alternatively, you can also add a message thread to a Topic by:
 - Selecting a message from the thread in the Outlook message list, then on the **Xiant Filer** tab clicking the **Add to Topic** button.
 - Right-clicking the message, then selecting **Add to Topic**.
 - Opening a message, then on the **Message** tab clicking **Add to 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.

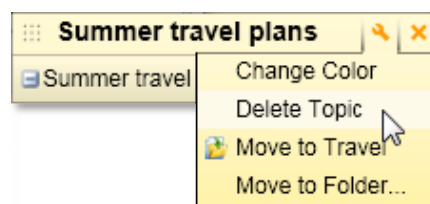
After you remove a thread, the Topic no longer monitors and collects messages from the thread.



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.



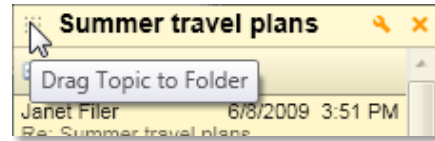
Filing messages from a Topic

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

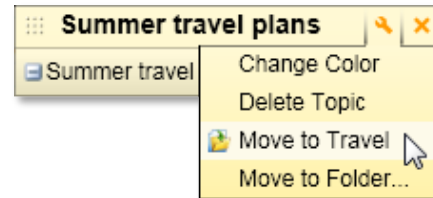
To file the messages in a Topic to a folder:

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

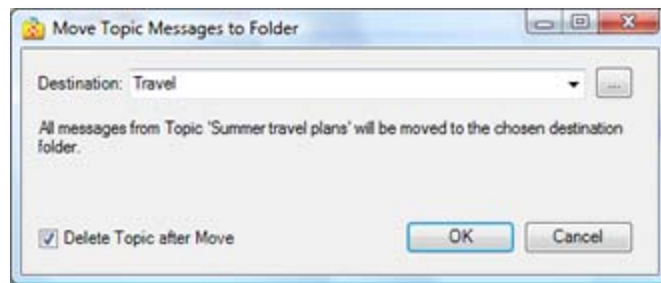
- Drag the Topic by the upper-left area of its title bar to an Outlook folder, or



- 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**.



Changing Xiant Filer™ behavior

Open the **Xiant Filer Options** dialog from the **Xiant Filer** tab in the Outlook window to change Filer's behavior and to 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 are part of the conversation.

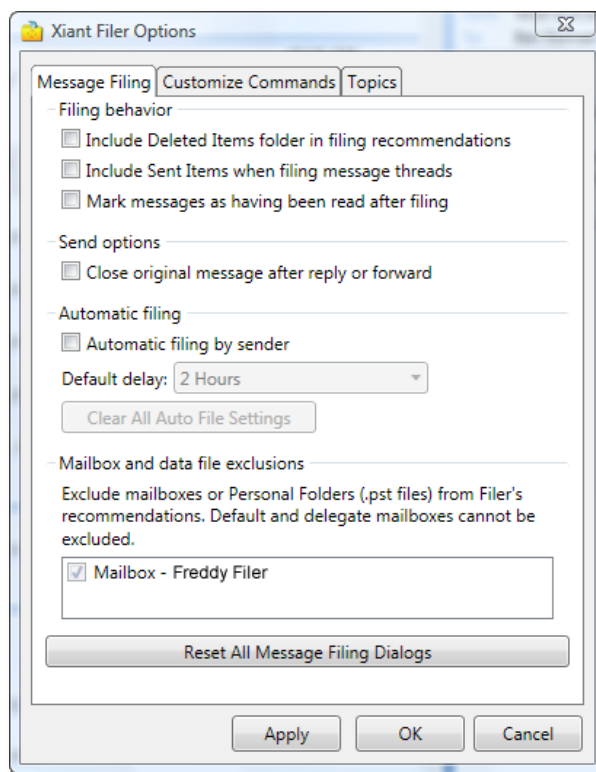
- **Mark messages as having been read after filing** check box

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 native to 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: on the **Outlook Options** dialog, under the **Replies and Forwards** section make sure that the **Close original message window when replying or forwarding** check box is cleared.



Automatic filing section

- 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 4 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 start fresh with new auto-filing rules.

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

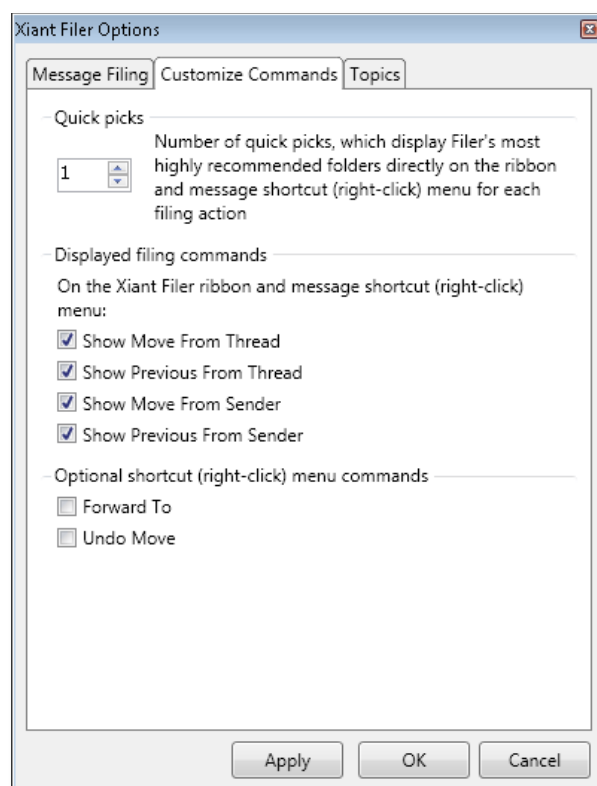
Click the **Customize Commands** tab to change the appearance of the Xiant Filer Ribbon controls and commands on the message shortcut menu.

Quick picks section

Use the box to customize the number of quick picks that can appear on the Ribbon and the message shortcut menu. By default, the number of quick picks is 1.

Displayed filing commands section

Use these check boxes to display only the filing actions that you want to be available on the **Xiant Filer** tab of the Ribbon 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 **Home** tab of the Outlook window and the **Message** tab of an opened message window.

Optional 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.

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.

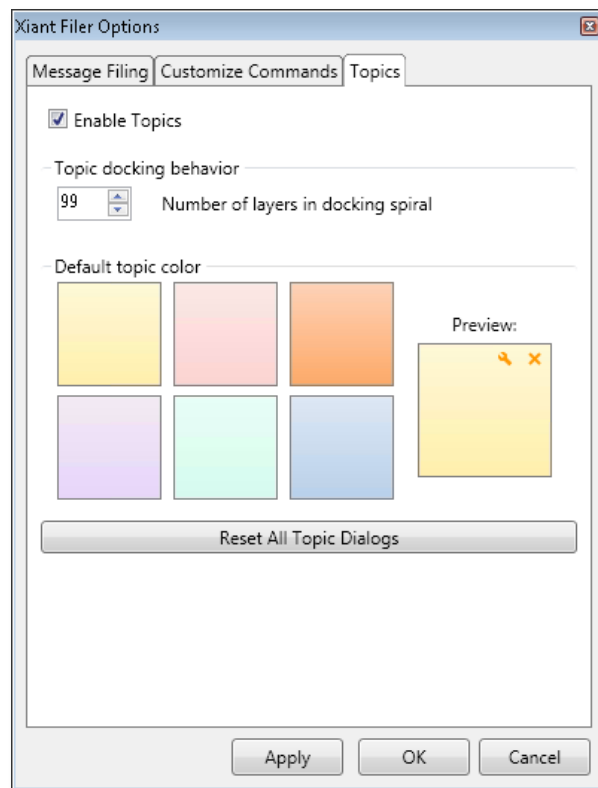
Topic docking behavior section

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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