

Instructions on how to:

- **Add, remove and label your filing locations**
- **Add filing reference text to the filenames of saved emails**
- **Create lists of filing reference templates for drag and drop filing**
- **Use reference templates for Cloud Sync filing from mobile devices**
- **Use the search tool to find emails efficiently**
- **Change your personal settings to configure eFiler to suit your needs**

Filing emails with eFiler:



To file emails with eFiler you need to select them and open the location manager by clicking on the eFiler icon on the toolbar and click the plus sign icon (see next paragraph) to browse to the folder you want to file into and add it to your list. There is one location created during the installation of eFiler which points to a folder containing three emails for you to read and experiment on with the search tool.



To add more locations simply click on the add location button at the bottom left corner of the Location Manager window, browse to the folder and click OK.



To remove a location from the list just click on the location to highlight it and then click the remove location icon.



To make it easy to find a location when the list is long there is a filter option above the list. Start typing the name of the folder and you will see the list shorten until only the folder you are looking for is shown.

As you file emails to and from particular people you will notice that the folder you need is at or near the top of the list. This is because eFiler works out the most likely folder you will need based on where you have filed to in the past.



Double click on the location to file your emails or click the icon showing email, pointer and disk.



If you realise you have made a spelling mistake or have left out an attachment then click the edit icon at the bottom right corner and make the necessary changes before sending and filing the email.



Many people find long UNC paths (C:\foldername\subfolder\etc.) hard to read. To make it easy to find your filing locations just add common sense labels to them using the label icons next to the add and remove buttons down at the bottom of the Location Manager window. To add



a label click on the add label icon and type the label, to remove one click the remove label icon and select the label you want to remove using the drop-down list. These labels can be anything - customer names, project name or number, whatever you want.



The cog wheel icon opens the configuration dialog. Check or uncheck the options as desired and hit Save Settings. For instance, you could choose to show the UNC path to a filing location as well as the labels.



To send an email without filing it just click the email icon in the middle of the bottom row.



In the settings menu you might have noticed the "Add Ref: text to filename" option. This allows you to add text to the filename of a saved email by typing it into the Ref: field that appears when you switch on the option. Please note that if this is made required you will not be able to file an email that hasn't had its Ref: text added. This could be a filing reference to help comply with your company's procedures or it might be a project number. It is simply a useful way of finding emails that might have been mis-filed by accident. If an email for project 1234 gets filed into project 2345 by mistake and the correct project number is in the filename then it will be easy to find with the search tool and put where it belongs.

As you file emails to and from particular people you will notice that the folder you need is at or near the top of the list. This is because eFiler works out the most likely folder you will need based on where you have filed to in the past.



Last but not least, you will see a search icon between the label and setting icons which will open the search tool at the selected folder.

How to use eFiler's uniquely intuitive and powerful search tool:

Find emails, read them and share them with colleagues and customers by sending links to them or sending them as attachments in a new email.

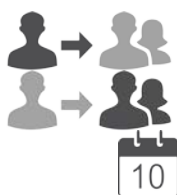


To open the eFiler search either click the search icon on the eFiler toolbar or, to open the search at a particular folder, click on the green eFiler icon next to it and select a folder and then click the search icon at the bottom of that window.



Select a folder to search in by using the drop-down menu as indicated in the search window. To select more than one folder to search through click on the list icon next to the drop-down. If you hover your mouse pointer over this button it will display a text balloon saying "Select locations to search in". Use Ctrl+click and Shift+click to select your desired locations and either double-click on one or hit the search icon at the bottom of the window and the search tool will update its indexes and display the results. Use the icons to manage your list of locations in the same way as in the filing location manager window.

Keywords typed into the search box will be highlighted in different colours in the preview pane. The search tool works like an internet search and more keywords will give more results. The keyword search will return words which contain the text of keywords. Keyword searches assume a Boolean OR between keywords. If no keywords are entered then all emails in the target folders will be returned.



Experiment with the filter icons to filter by sender, recipients, dates, subject line, content or the body of the email and text typed into the Ref: field during filing. Remove unwanted filters by clicking on their red crosses and hit Enter on your keyboard to refresh the search. Filtered searches assume a Boolean AND between keywords. Filters can be applied without anything entered in the main search box.



eFiler search results are constantly updated and synchronised. If you think someone might have added emails to the folders you are searching through while you have been using the search tool then click the refresh icon and the indexes will be updated. Indexing activity is displayed at the bottom of the search window.

If you have removed all the filters and are not getting the results you were expecting then try clicking the search icon next to the search input box to reset it.



The chain link icon creates an email which contains links to the emails selected in the search results. Have a play with it. It's a good way of alerting colleagues to the existence of an email without creating a duplicate.

If you want to send emails in their original form to someone then right click on the selected emails and select the option to send them as attachments. You will notice that there are various other self-explanatory functions in the right click menu.

Because the eFiler search keeps its indexes on your local hard drive you can file emails, deleting them from your Inbox as you go, and still be able to read them when you are out and about by selecting all your filing locations and doing a search with no keywords. You will then be able to use eFiler's search to find and read them.

Please note: The default configuration is for eFiler to search through folders and all of their subfolders. So in an extreme case you might want to search from the root of a drive and index its entire contents. This could potentially create a lot of indexes which could need a large amount of disk space. If you don't want to use the subfolder search please switch it off in the settings menu.

Optional functions and configurable options of eFiler:



To open the settings menu either go to Outlook's Tools menu and select "eFiler settings" or click on the cog-wheel icon in the filing window opened by clicking the green eFiler icon on the eFiler toolbar.

If you want to deploy a business-wide configuration with any settings greyed out for the user to prevent tinkering we can do that for you on our licence server. Contact us for details.



Add Ref: text to filename

This creates the Ref: field in the filing window where you can type text to be added to the filename of the email to be saved. This could be a project name or number or a filing reference for those businesses who like their electronic files to have the same naming system as their paper files. Making it required means that an email can't be sent or filed unless there is text in the Ref: field.



Drag and drop filing: Drop Panel and Cloud Sync

Enabling the drop panel filing in the settings menu will display the semi-transparent eFiler Drop Panel. This allows for drag and drop filing and also enables lists of often-used Ref: text to be created so that emails dragged and dropped onto the drop panel will have the Ref: text of the selected templates automatically added to their file names when saved. There is no limit to the number of templates that can be created for each filing location.



Managing your Drop Panel templates

You can create Drop Panel templates in two ways, either by clicking the list icon in the Location Manager or by clicking the same icon on the Drop Panel itself to open the File Ref: Manager.

When the File Ref: Manager is opened from the Location Manager it preselects and greys out the currently selected filing location in the Location Manager.

When the File Ref: Manager is opened from the Drop Panel you can select a location by typing the location name or from the drop down.



Add Ref: text to create a template

With a filing location selected, simply type the Ref: text for each template and click the Plus icon to add the template to your list. Click the minus icon to remove a template.



When the File Ref: Manager has been opened from the Location Manager and templates have been created as required, the tick Ref icon will take you back to Location Manager.

Using Fast Drop method

If you select the Fast Drop method in the eFiler Settings menu you will see your full list of templates to choose from when you drag emails over the Drop Panel for filing.

If you would rather just see the preferred location for the emails you are filing leave the Fast Drop unselected.

Filing from mobile devices with Cloud Sync

Selecting Cloud Sync in the eFiler Settings menu will create a new eFiler Cloud Sync folder in your Outlook Mailbox containing subfolders named after your Drop Panel filing templates. Although you can simply file emails by dragging and dropping them into these subfolders, and eFiler will file them as if dropped onto the Drop Panel, the real benefit of the Cloud Sync, as its name suggests, is that on any suitable mobile device you will see these folders appear.

To file emails using your mobile device simply select emails and move them into these folders and eFiler will do the rest.

Delete email after filing

This is part of eFiler's core mission: to reduce the amount of emails sitting in your Mailbox and slowing down your server and your Outlook and generally being undesirable. Do your employer a favour and select it if the IT department hasn't already done so. Remember: you can use the search tool to keep a readable copy of your emails even if they have been deleted. Just be sure to search your folders on a regular basis to keep the indexes up to date.

Prompt to send links

This will prompt you to send links to emails as they are filed. This can be very handy where team members need to know what's new and you don't want to slow down the email servers or clog up the network by sending copies of huge emails: just send links to saved emails instead.

Prompt to save sent message

This causes the filing tool to open when you send an email to ensure that all outbound emails are saved as they go. It is good discipline to use this and it gives you peace of mind as you know you have saved your emails so you can be sure they are safe and where they belong: where your colleagues can find them without asking.

Hide UNC path (show labels only)

This allows you just to see filing location labels rather than the long UNC path which is hard to read. Using this makes using eFiler even easier as it gives you the opportunity to refer to a folder by a name that means something to you.

Change licence ID

This opens the licensing tool to enable you to register or re-register your installations of eFiler. We can see each machine as it is registered and keep a tally against your available licence activations so if you need to retire machines, move licences around or get an audit of your licences for compliance reasons we can do that for you quickly and easily. Instructions on licensing are included in the email containing your licence ID.

Change filing filename template

As it saves each email eFiler gives it a filename which includes the sent date and time (down to the second), the sender's name, the subject line and the text added in the Ref: field if used. Use this tool to change the order in which these variables appear by selecting each one and moving it up or down depending on your preference. You can also add "Sent" or "S" to the filenames of sent messages and "Received" or "R" to received ones so you can file all your emails into one folder and separate them in the search tool.

As eFiler doesn't identify an email by its filename you can try to save an email that has already been filed and even if the two copies have different filenames eFiler will still only save one of them.

Show filing confirmation

When you file an email eFiler will create a pop-up window telling you how many emails have been processed, how many have been filed and how many had already been filed in that location. This is a quick way of seeing if an email that has been sent to you and many other colleagues has already been filed - try to file it and see what happens. It means you don't have to keep checking the search tool to see what has been filed and what hasn't. If you have chosen to be prompted to send links to file emails this is where it happens. Click Yes to send the links.

Windows Explorer right click to send links

As you know, eFiler allows you to send a link after filing and from the search tool. It also allows you to send links to selected files directly from Windows Explorer. Just select the files (not folders) and right click: you will see the option to send eFiler links in the menu. Use this to send links to large files to your colleagues instead of wasting network capacity sending the files themselves.

Search subfolders

The default configuration is for eFiler to search through folders and all of their subfolders. So in an extreme case you might want to search from the root of a drive and index its entire contents. This could potentially create a lot of indexes which could need a large amount of disk space. If you don't want to use the subfolder search please switch it off in the settings menu. If you do decide to index an entire drive please bear in mind that this will take some time, depending on network conditions and the speed of your machine. It is best just to leave it to finish before doing detailed searches as otherwise there is a chance that you could be searching for an email that hasn't yet been indexed.

For Advanced configuration options please visit

<http://efiler.co.uk/support/advanced-user-guide/> or contact us directly support@efiler.co.uk



eFiler about

In the Help menu of Outlook you will see "eFiler about" which contains links to technical support and information about your licensing status.