

PINKERFIND UG (HAFTUNGSBESCHRÄNKT)



Pinker User Manual

Version 1.3

10/10/2018

Create index of the content of your folders, combine search filters to find your data quickly and reuse common used searches

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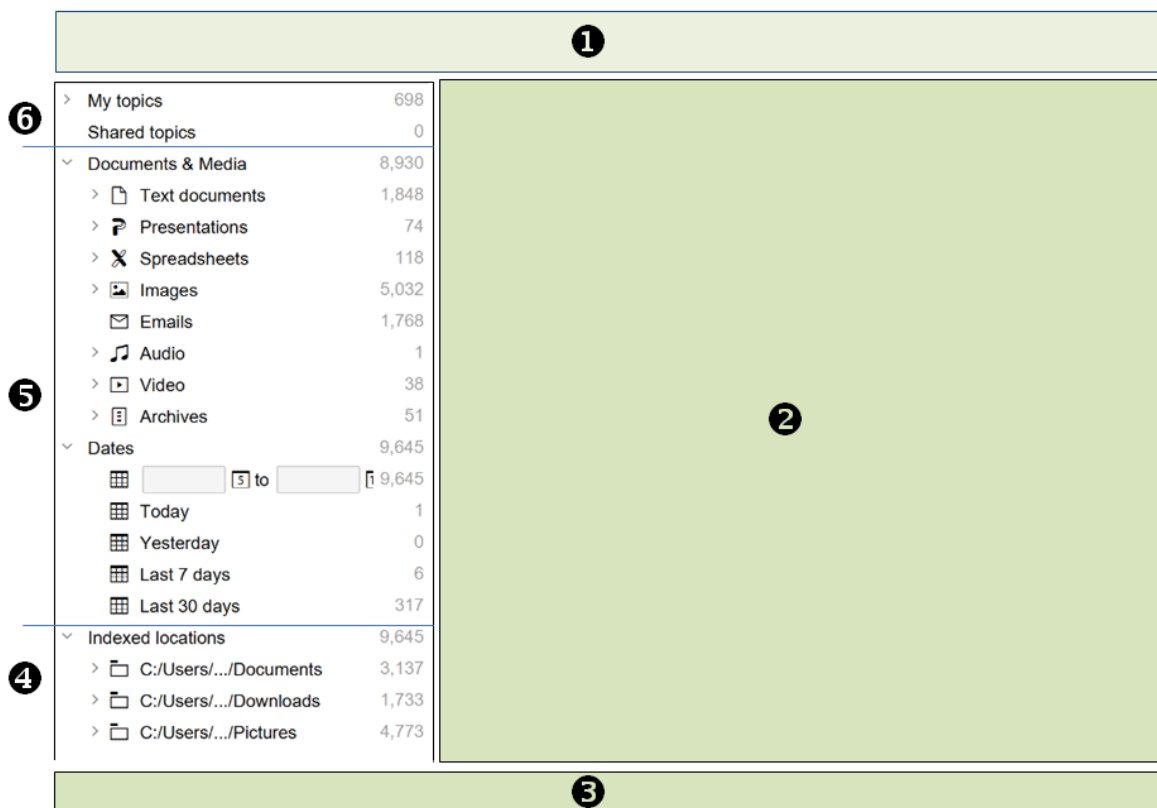
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Introduction to Pinker

Pinker allows you to find files fast, wherever they are stored on your computer or on drives attached to it, including cloud drives.

- **Search** for specific words or strings **by typing** them in
- **Left-click** an item on the *Filters* panel **to browse** files matching a topic, file property, or file location
- **Right-click** an item on the *Filters* panel **to filter** by topics, properties, or file locations
- Freely **combine** filters and full text searches and **store** them as *Saved searches*

The Pinker main screen has six areas, numbered clock-wise in the illustration below



1 Search, customization and help area
Enter search expressions to find files wherever they are stored. Save searches under a name for future use. Navigate your search history. Update the Pinker index on demand, change Pinker settings and get help. By default Pinker is configured to index your desktop, documents, downloads and pictures folders.

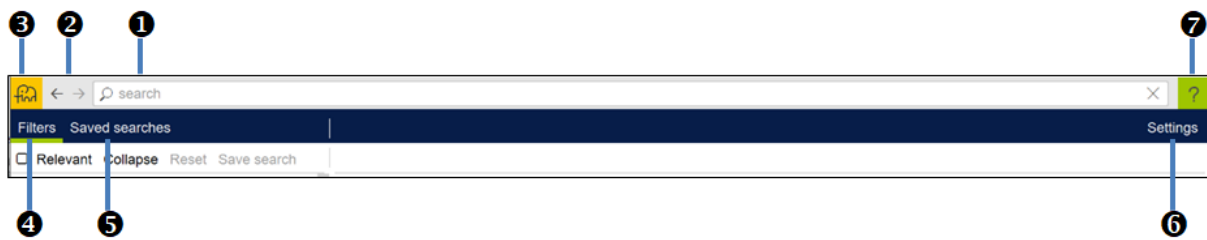
2 Results area
This area shows the current result set, i.e. the files that match

- the search expression you entered
- the filters you selected for your file properties
- the filters you selected for your topics


The content of the Results area is dynamically updated as you change your searches and filters. By default, the content of the Results area is ordered by date. Initially, and when no search is active, the Results area shows the Pinker logo.

3	<p>Status line</p> <p>The status line displays the status of the indexing process. It will indicate when Pinker is looking for new and changed files and the number of files being analysed. Once indexing is completed, the status line shows the time up to which changes to files have been taken into account. Pinker indexes your files at start-up or when you request an update.</p>
4	<p>Indexed location filters</p> <p>These filters allow you to focus on specific drives and folders when browsing and looking for files. They correspond to your selection of drives and folders indexed by Pinker and can be used on their own or in combination with file property and topic filters. Match counts next to the individual filters indicate how many files from the current result set are stored in each folder. You can left-click on a filter to browse just those files.</p>
5	<p>File property filters</p> <p>File property filters allow you to focus on specific file types, dates and combinations of those. Match counts next to the individual filters indicate how many files matching a particular property exist in your current result set. You can left-click on a filter to browse just those files.</p>
6	<p>Topic filters</p> <p>Topic filters – which you can define yourself – allow you to focus on specific topics and combinations of those. Match counts next to topics or sub-topics indicate how many files matching a particular sub-topic exist in your current result set. You can left-click on a filter to browse just those files.</p> <p>Topics are a great way to narrow down your search and be as specific as possible when telling Pinker which files to find. Creating, managing, and using your topics as filters is a fast effective way to logically organise your files.</p>



Search, customization and help area




1 Search field

The *Search field* ( search) allows you to enter search words and find files that contain them. You can enter single words, word combinations in quotes, or expressions such as vacation AND (Joe OR Jane) AND NOT "bad weather".

2 Navigate search history

The back () and forward () buttons allow you to move back and forth between the searches you have performed.

3 Navigate to the home page

The Pinker button () clears all search words, resets all filters, and brings you to the Pinker home page.

4 Work with *Filters*

The *Filters* panel allows you to specify filters in order to find files of interest. From this panel you can adjust the way how filters are shown by collapsing these or by showing only those topics or file property filters with matches. It also allows you to either reset all filters after a search or save a search for future reference.

5 Work with *Saved searches*

The *Saved searches* panel allows you to browse previously saved search criteria as if they were folders.

6 Settings

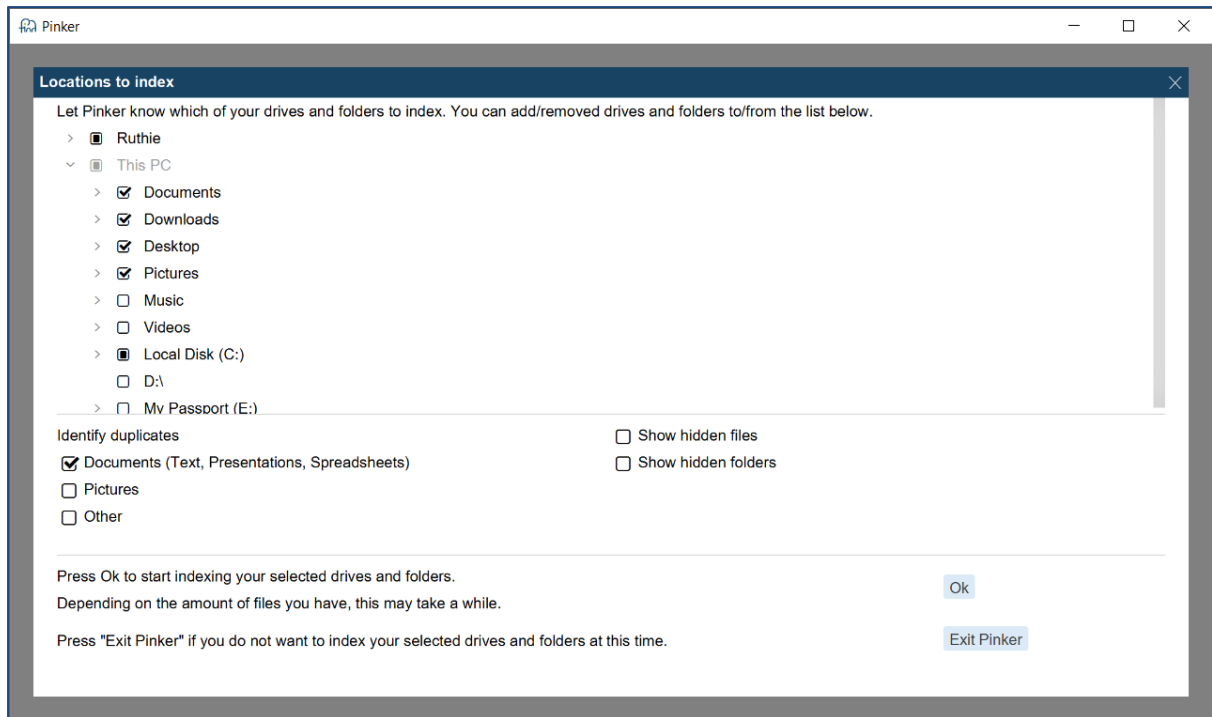
The settings button allows you to configure drives and folders to be indexed, manage topics, change languages, provide diagnostic feedback when encountering Pinker errors, view 3rd party licenses, and view and update your Pinker license.

7 Get help

The help button () opens the Pinker help pages in your default browser.

Select drives and folders to index

Pinker can index any drives and folders on your computer, plus external storage devices such as portable drives and memory cards (e.g. external drives, memory sticks, etc.), shared network drives, and cloud drives. When you run Pinker for the first time, you have to confirm its standard drive and folder selections or select yourself the drives and folders you want Pinker to index in the 'Locations to index' screen as shown below.

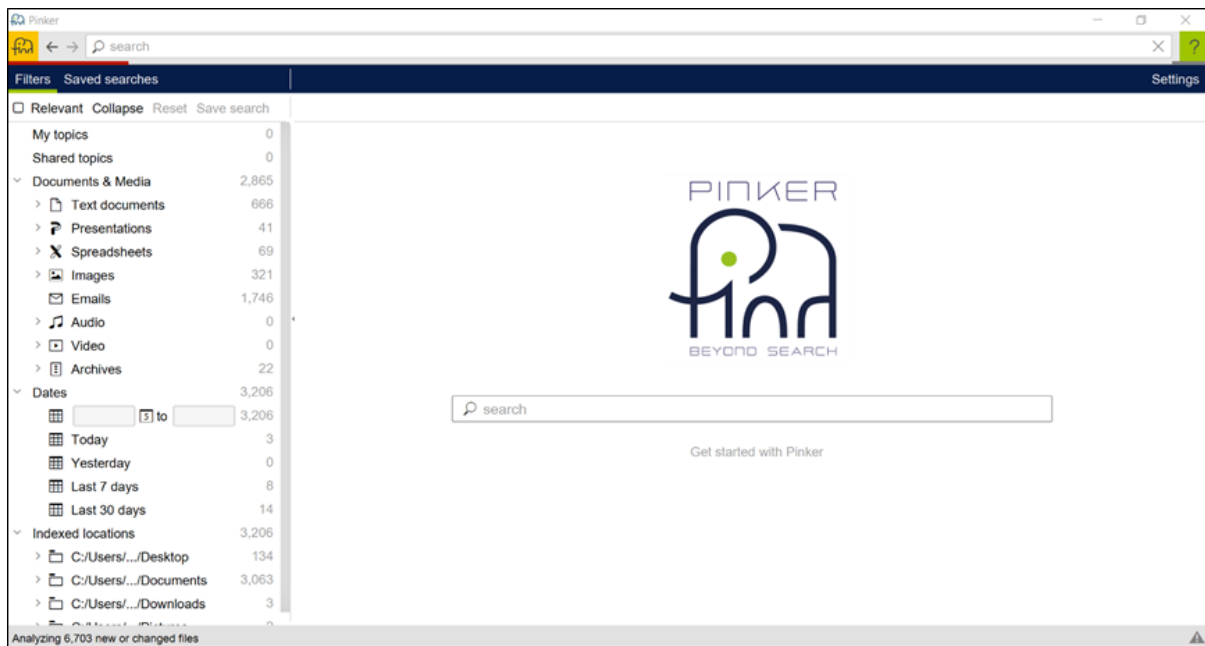


On this screen you can:

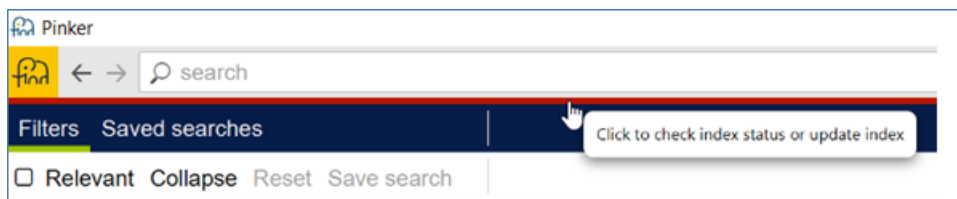
- Change the selection of file locations (drives, folders) to index by deselecting or adding other drives and folders from drive and folder tree
- Change the option to identify duplicated files in the initial indexing process
- Include system files and/or hidden folders in the initial indexing process
- Press "OK" to start indexing the selected drives and folders
- Exit Pinker without performing any indexing.

It is recommended not to identify duplicates of pictures for the first time of running Pinker but as and when needed at a later time because identifying duplicate pictures is time consuming.

Once you press “OK” the indexing process starts and Pinker displays the home page:

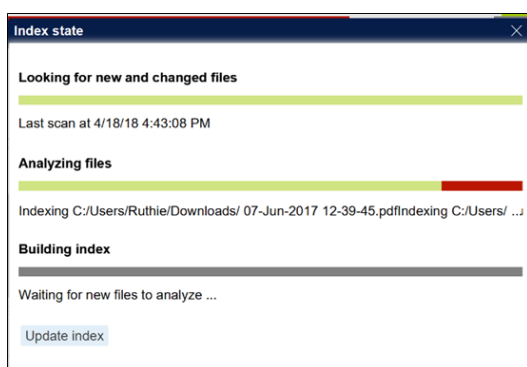


In this example Pinker is indexing four folders on local drive C: as shown under the “Indexed locations” filter above. The numbers next to each location indicate the number of matching files that have been indexed by the time the home page is displayed. These numbers are periodically updated as indexing goes on. The status of the indexing can be checked by left-click in the black area just below the *Search* field to view the *Index state* panel (the red line appears only during indexing).

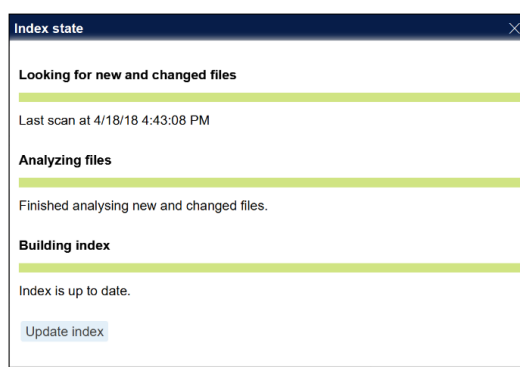



The *Index state* panel will show one of the following conditions:

Indexing process is in progress



Indexing process has finished



Additionally, the status of the indexing can be monitored in the status bar at the bottom left of the home page. To check for files that were not indexed correctly left-click  at the bottom right corner of the screen.

Name ^	Error	Type	Size	Date modified
📁 ._Checklist Terrestr	Error: End-of-File	pdf-file (zip)	222 B	6/11/15 12:4
📁 ._Checklist Terrestr	Error: End-of-File	pdf-file (zip)	222 B	6/11/15 12:4
📁 ._Checklist-Terrestr	Error: Header dc	pdf-file (zip)	222 B	7/7/15 11:53

Understand the Results area

The Results area displays your current result set. The content shown here depends on whether you are searching for a specific term and/or if you are applying filters to the information in your storage devices to home-in on the files of interest. Here are two views of the content of your Results area:

Search for a specific term

This example shows the result set of searching for files associated with the word `travel` typed into the search field:

The screenshot shows the Pinker search interface with the search term "travel" entered. The search results are displayed in a table with columns for Name, Date modified, Size, Path, Type, and D. The results are categorized into "My topics" and "Indexed locations".

Name	Date modified	Size	Path	Type	D
📁 Pinker user manual for web store April 18.docx	4/18/18 11:05 PM	11 MB	C:\Users\Ruthie\Documents\Pinker documentation	docx-file	-
📄 Electronic_ticket.pdf	4/2/18 10:53 PM	87 KB	C:\Users\Ruthie\Downloads	pdf-file	-
📄 Pinkerfind overview August 21 2017.pptx	3/3/18 5:11 AM	14 MB	C:\Users\Ruthie\Documents	pptx-file	-
📁 Pinker user manual for web store February fin	3/3/18 5:11 AM	11 MB	C:\Users\Ruthie\Documents\Pinker documentation	docx-file	-
📁 Pinker user manual for web store January.doc	1/19/18 6:42 PM	11 MB	C:\Users\Ruthie\Documents	docx-file	-
📁 Pinkerfind manual Jan20.docx	1/19/18 4:57 PM	11 MB	C:\Users\Ruthie\Documents	docx-file	2
📄 Section 2.3 - Methodology updated.pdf	1/8/18 4:34 PM	641 KB	C:\Users\Ruthie\Downloads	pdf-file	-
📄 Contenido de la maleta.docx	12/21/17 6:13 AM	16 KB	C:\Users\Ruthie\Documents	docx-file	-
📄 Contenido de la maleta.pdf	12/21/17 2:42 AM	196 KB	C:\Users\Ruthie\Documents	pdf-file	-
📄 Pinker editions December 2017 - Pinkerfind cc	12/8/17 5:29 PM	109 KB	C:\Users\Ruthie\Downloads	xlsx-file	-
📁 Pinker user manual for web store 4 Sept merg	11/30/17 5:38 AM	10 MB	C:\Users\Ruthie\Downloads	docx-file	-
📄 Pinker user manual(1) test.pdf	11/30/17 5:36 AM	3.3 MB	C:\Users\Ruthie\Downloads	pdf-file	-
📄 E Ticket Itinerary and Receipt for Confirmation	11/28/17 6:16 AM	130 KB	C:\Users\Ruthie\Downloads	pdf-file	2
📄 Flight ticket New Orleans RL.pdf	11/28/17 5:32 AM	139 KB	C:\Users\Ruthie\Documents	pdf-file	-
📁 Info Contractors.doc	11/20/17 1:00 AM	29 KB	C:\Users\Ruthie\Downloads	doc-file	-
📄 eTicket Itinerary and Receipt for Confirmation	11/20/17 12:54 AM	102 KB	C:\Users\Ruthie\Documents	pdf-file	-
📄 eTicket Itinerary and Receipt for Confirmation	11/20/17 12:38 AM	133 KB	C:\Users\Ruthie\Documents	pdf-file	-
📄 eTicket Itinerary and Receipt for Confirmation	11/20/17 12:30 AM	134 KB	C:\Users\Ruthie\Documents	pdf-file	-
📄 eTicket Itinerary and Receipt for Confirmation	11/20/17 12:24 AM	130 KB	C:\Users\Ruthie\Documents	pdf-file	-
📄 eTicket Itinerary and Receipt for Confirmation	11/20/17 12:18 AM	130 KB	C:\Users\Ruthie\Documents	pdf-file	-

Browse a saved search

In this case the content of the Results area shows all the files included in the "Flight reservations" saved search (selected from the *Saved searches* list).

The screenshot shows the Pinker search interface with the saved search "Dutch tax 2010" selected. The search results are displayed in a table with columns for Name, Date modified, Size, Path, Type, and D.

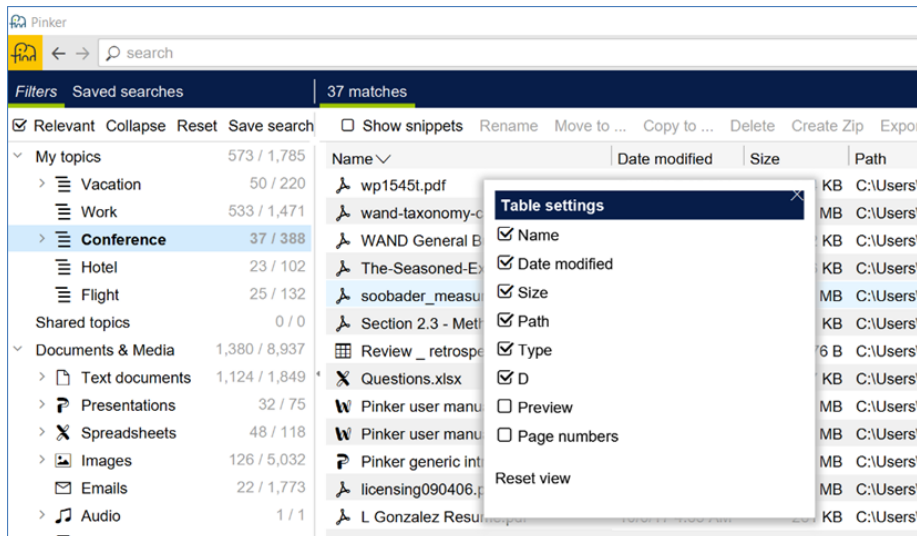
Name	Date modified	Size	Path	Type	D
📄 Mergers and Acquisitions in Oil and Gas 201	8/4/16 4:31 PM	3.2 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	-
📄 EY-global-oil-and-gas-transactions-review-2	8/4/16 4:27 PM	1.4 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	3
📄 Oil in Mexico. Pozo de Pasiones1.pdf	7/11/16 7:28 PM	1.8 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	-
📄 Mexico - olie en gas_0.pdf	7/11/16 6:47 PM	3.1 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	-
📄 soobader_measuring_2008.pdf	7/5/16 11:43 PM	1.8 MB	C:\Users\Ruthie\Downloads	pdf-file	-
📄 EY-global-oil-and-gas-transactions-review-2	7/5/16 8:15 PM	1.4 MB	C:\Users\Ruthie\Documents\Scanned Documents\licer	pdf-file	3
📄 EY-global-oil-and-gas-transactions-review-2	7/5/16 8:15 PM	1.4 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	3
📄 518400PUB0REPL101OfficialUse0Only1.pr	7/1/16 6:55 PM	3.3 MB	C:\Users\Ruthie\Documents\licensing	pdf-file	2
📄 518400PUB0REPL101OfficialUse0Only1.pr	7/1/16 6:55 PM	3.3 MB	C:\Users\Ruthie\Documents\Scanned Documents\licer	pdf-file	2
📄 Project 18131 Actuals for Close out.xls	4/23/10 5:04 PM	466 KB	C:\Users\Ruthie\Documents\Outlook Files\Outlook.pst: xls-file (@	-	-

The information shown in the Results area is ordered by date by default; it can also be ordered by any of the other column headers. Additionally, the columns can be swapped around by horizontally dragging and dropping a column's header.

Note that the content of the search field and the selections applied to filters are changed as you navigate the search history, select one of the *Saved searches*, or navigate to the home page.

Columns configuration

The columns shown in the Results area can be configured using the “Table settings” menu. To open this menu just left-click any of the column's header:

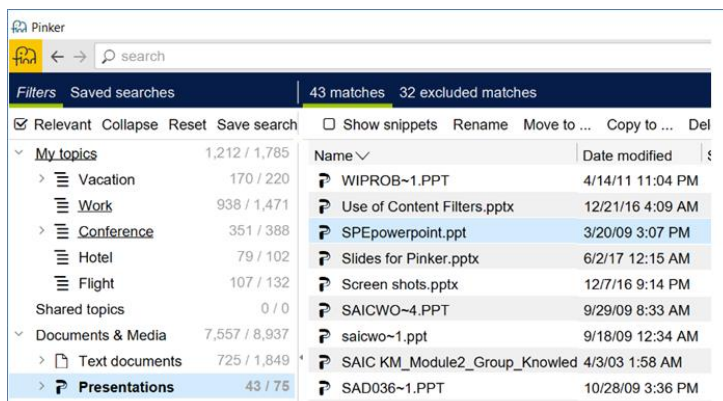


The “Table settings” allows the user to select/de-select the columns name whose information should be presented in the Results area.

The page numbers column is useful when searching for a term typed in the search field to indicate in which pages of a pdf file the term appears (only applicable to pdf files). This feature has been created to be used in conjunction with the Export functionality.

File footprint

At any moment when you select an item from the results area, the filters term under “My topics” will be underlined to indicate that the underlined term(s) is (are) contained in the selected item. In the example shown, the file SPEpowerpoint.ppt contains the term ‘Work’ and ‘Conference’.

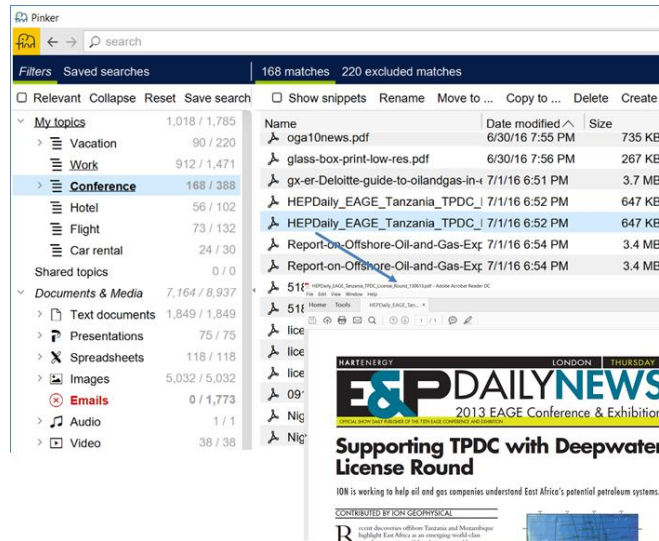


File operations

From the Results area you can analyse the content of files and folders and perform the following file operations:

View or edit a file

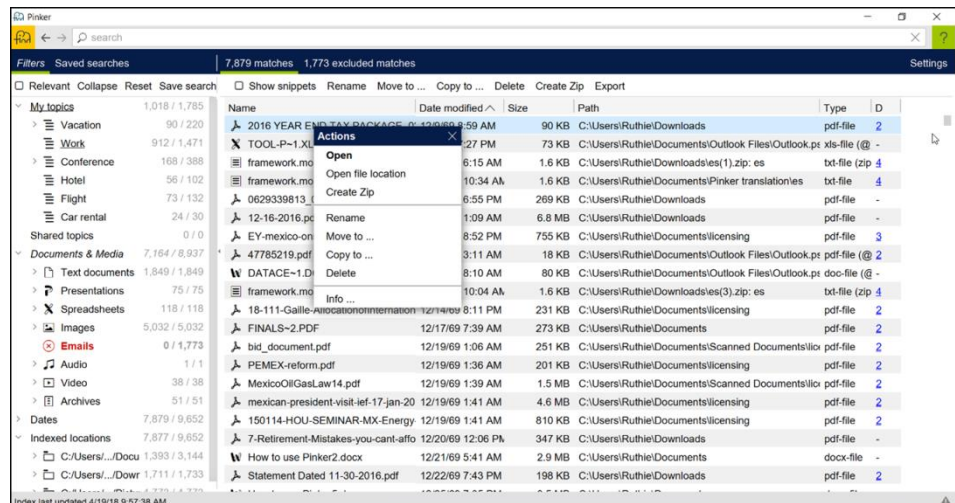
- Double-click on a specific file will open the file for viewing or editing using the application associated on your computer with its type



Work with a selected file

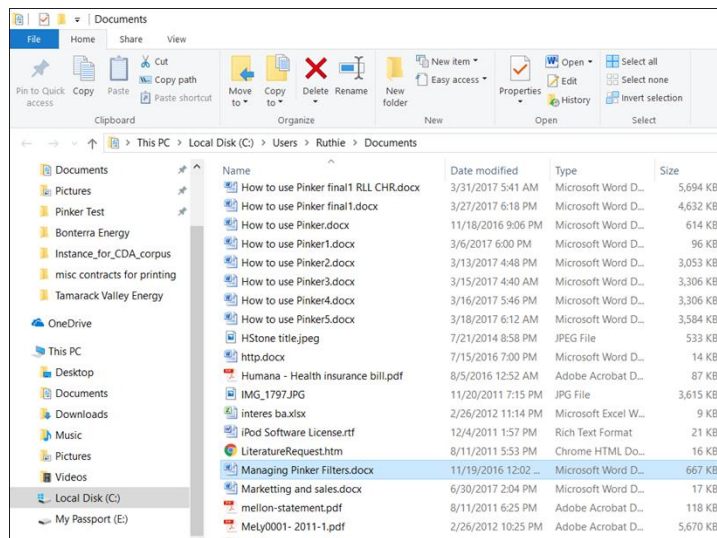
- Right-click on a file to open the Actions menu

Note that the file management tasks of rename, move, copy, delete and create zip files can also be done using the buttons at the top of the screen.

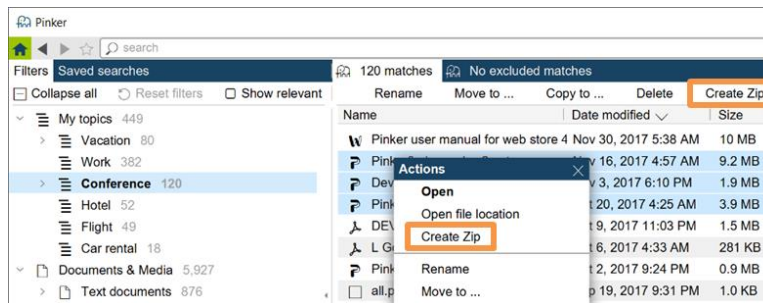


- The “Open” action from this menu has the same effect as double-clicking a file: it will open the file for viewing or editing using the application associated on your computer with its type.

- The “Open file location” action shows the file in the system’s folder view

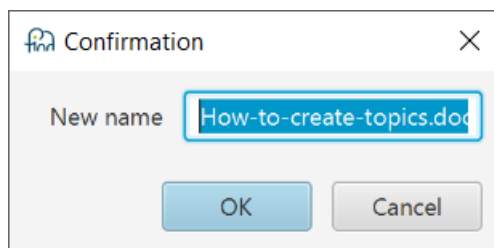


- The “Create Zip” action allows you to select files from your Results area to “zip” them. Files can be zipped using the Actions menu or from the tab at the top of the screen

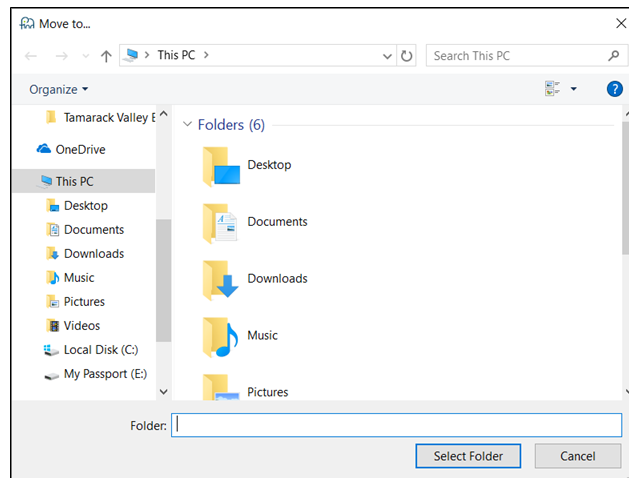


The resulting zip file can then be saved. Using shift-click and/or control-click allows you to (de-) select file ranges and individual files for zipping

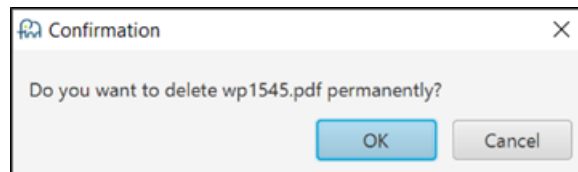
- The Rename action allows you to change the name of a file in two steps:
 - Select “Rename” from the Actions menu
 - Assign the new name to the file in the confirmation window and press “OK”



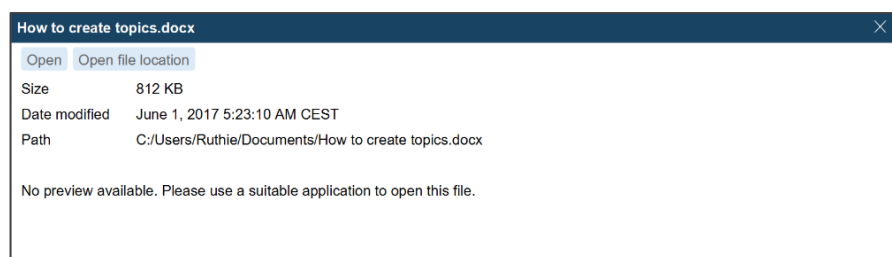
- To move or copy a file to a different location:
 - Select “Move” or “Copy” from the Actions menu and the standard microsoft folder directory will be shown for you to select the folder where the file will be moved or copied to.



- To permanently delete a file using the Actions menu:
 - Select “Delete” Confirm the action by pressing “OK” in the confirmation window.



- The “Info...” action provides additional information for a selected file as shown in the illustration below. From here you can also open a file or its location.

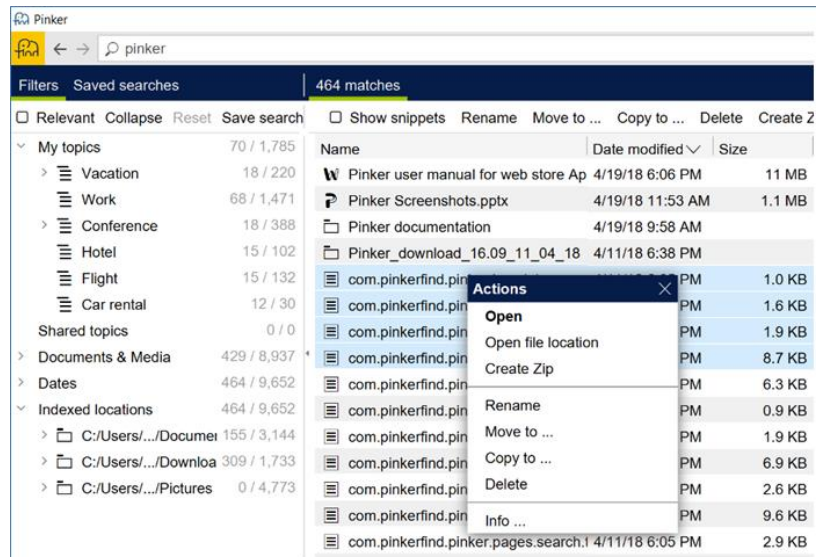


In the case of pdf or text files Pinker will show a preview of the document

Move, copy and delete group of files

- Select the files to move, copy or delete
- Right-click on one of the file selected to open the Actions menu
- Select the action to work with

Alternatively you can use the buttons at the top of the screen. Note that you cannot rename group of files.



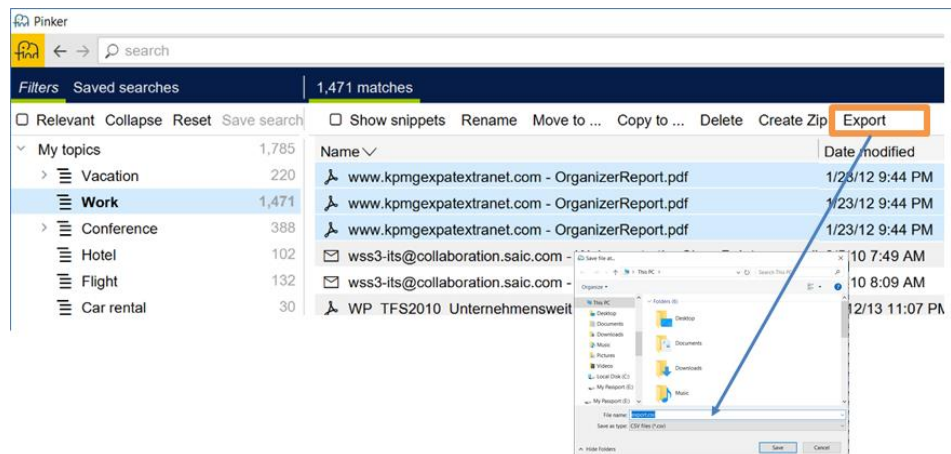
The selection of group of files follows the common procedure of using Shift-click for files that are contiguous and/or Ctrl-click for non-adjacent files.

You can move or copy files located in different folders to one folder.

Export

The export is done to a text file containing information separated by commas.

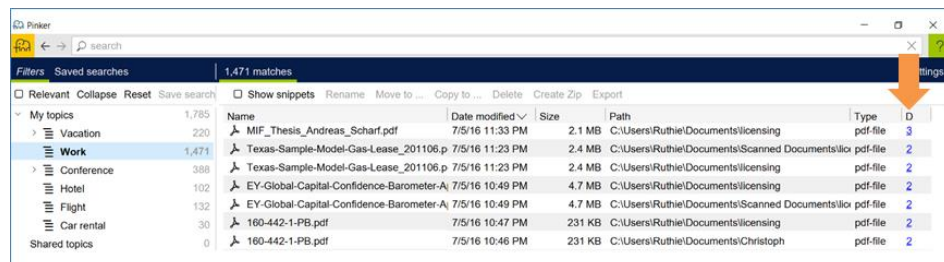
This option allows the user to create a CSV file of a selected file or range of files from the content in the results area.



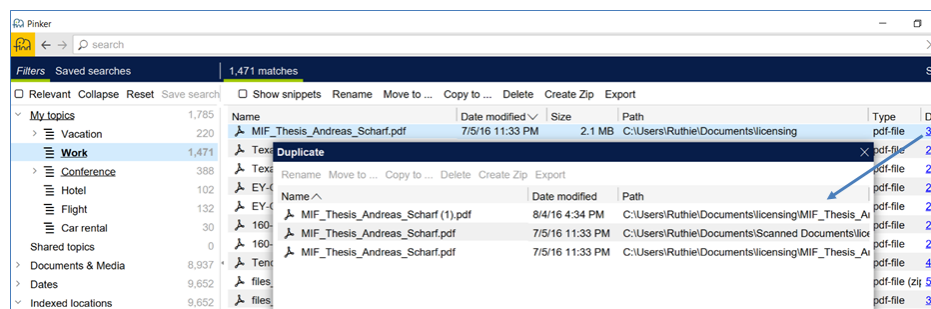
Manage duplicated files

Files that are duplicated, either with the same or different name, are identified by Pinker while indexing files.

The total number of duplicates for a specific file is shown in column D of the Results area, as illustrated below.



Left-click the number of duplicates in column D will show the details of the duplicates. In the example below by left-clicking the number 3 in column D of *MIF_Thesis_Andreas_Scharf.pdf* file will show the following information:



From this window you can:

- Rename a duplicated file, one at a time
- Move, copy, delete and zip duplicated files individually or in groups from multiple locations without the hassle of thinking where they are stored.

Use search expressions in the search field

In addition to simply typing in words to search for, Pinker allows you to enter Boolean search expressions in the search field.

If you simply enter several words, Pinker will find files that contain all of these words. Entering `travel beach sunshine` is equivalent to entering `travel and beach and sunshine`.

To find files that contain any of the search words, use `or: travel or beach or sunshine`.

`and` has precedence over `or` (i.e. `and` is “stronger” than `or`). `travel or beach and sunshine` will find all documents that contain the word ‘travel’ or the two words ‘beach’ and ‘sunshine’. It will not find files that contain ‘beach’ but neither ‘travel’ nor ‘sunshine’.

To exclude files that contain particular words, use `not` in front of the word e.g. `travel beach not sunshine` will find files that contain the words ‘travel’ and ‘beach’ but not the word ‘sunshine’.

You can use parentheses. `(travel or beach) and sunshine` will find all files that contain one of the words ‘travel’ or ‘beach’ and the word ‘sunshine’ (so ‘sunshine’ must be present).

You can use single or double quotes (“...”, ‘...’) to find files that contain specific word sequences. Entering `“Beach and sunshine”` (the quotes are part of what you enter) will find files that contain those exact words, including the ‘and’. There is no difference between upper case and lower case spelling.

A number of characters are special to Pinker. If you want to find them in documents, you have to put them in quotes. These characters are `(,), #, +, -, &, \, [,], ?, =`.

Work with filters

Pinker offers three types of filters to help you tailor a search and with that the files shown in the *Results area*: **Topic Filters**, **File Property Filters**, and **Location Filters**. Filters are arranged in a tree structure. You can simply browse your files by selecting filters, and you can combine filters to further shape the search result.

Pinker offers the following filters:

Type	Name	
Topic filters	<p>My topics and Shared topics</p> <p>Define your own or to share topics through sets of related keywords. Change the definition at any time and instantly see the effect.</p>	
File property filters	<p>Documents & Media</p> <p>These filters are pre-defined and based on file types. When expanding a branch, additional filters are shown, and the match counts are further segregated into the filters defined for each file type.</p>	
	<p>Dates</p> <p>Use date ranges as filters. In addition, Pinker offers pre-defined date ranges that you can simply select.</p>	
File location filters	<p>Indexed locations</p> <p>Indexed folders can be viewed and used as filters. The organization of these filters reflects the structure of your file system(s). Un-indexed drives and folders are not shown.</p>	

The match count next to each filter indicates the number of files matching this filter that exist in the indexed locations. These numbers are shown while no search is being applied.

Topic filters differ from file property filters in that you can define them yourself to meet your specific requirements. You can add, change and delete topics by right-clicking a topic and using the 'Edit ...' option in the context menu. Explanations of how to do this can be found in the Define topic filters section.

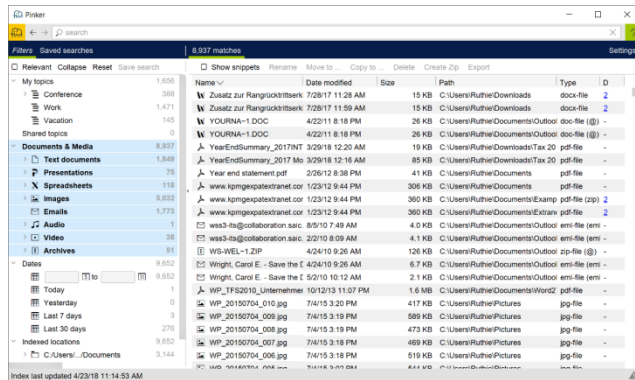
Browse

Browsing by filter allows you to selectively view files that match a filter or filter group independently of where those files are stored. Browsing by filters is useful for obtaining a quick overview of the content of your indexed locations. The available left-click interactions to browse files matching any filter at any branch level are:

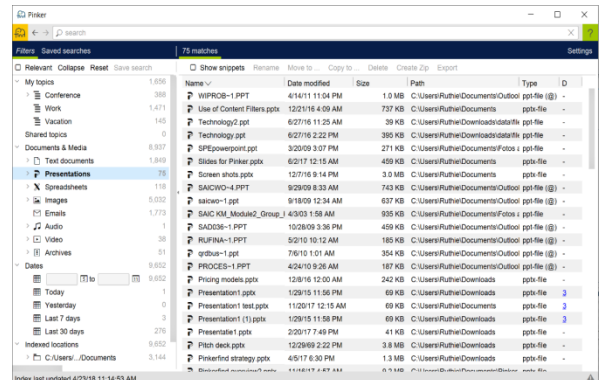
- Left-click any of the **Filters** on the filter panel

Here are some illustrations of browsing by filter. Note that filters can be hierarchically grouped and that browsing by a filter includes files that match any of its sub-filters; an example of this is the “Documents & Media” filter below.

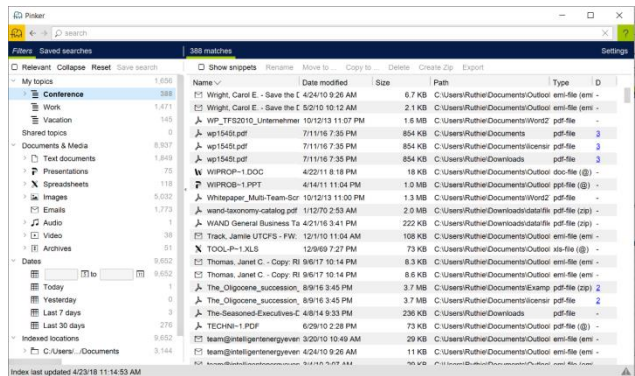
Left-click on “Documents & Media” filter



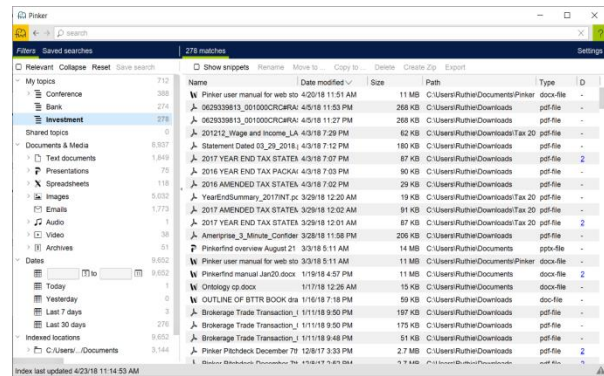
Left-click on “MS PowerPoint” filter



Left-click on “Conference” filter



Left-click on “Investment” filter



In all cases, the Results area shows all files that match the browsed filter

Once you have found the files of interest, you can select a file for viewing or editing, or view detailed information about the file's location as explained in the “Understand the Results area” section.

Combine filters

You can combine filters to tailor search results. Pinker set operations allow you to specify filter combinations. Right-click on a filter to see the available set operations:

Require	Find all files that match the selected filter and display the resulting search result in the Results area. Match counts for all filters are updated to reflect matches found in the content of the Results area. This set operation is applicable at all branch levels of any filter.
Exclude	Exclude all files that match the selected filter from the current search result. Match counts for all filters are updated to reflect the current search result.
Add also	Add files matching the “Add also” filter to the result set created by the “Require” filter. “Add also” is only available after a “Require” set operation has been applied to a topics filter; it is not applicable for File Property or Location filters.
Suppress	Remove from the result set all files matching the “Suppress” filter that do not contain terms from the “Require” or “Add also” topics. “Suppress” is only available after a “Require” set operation has been applied to a topics filter; it is not applicable for file property or location filters.
Include	It is only applicable to file property and location filters

It does not matter in which order you select and combine filters, the result set will always be the same.

Each set operation has an associated icon and colour. These colours indicate which set operations have been applied to which filters. To reset the selection of a set operation use the corresponding reverse option in the context menu:

 Require	 Don't require
 Exclude	 Don't exclude
 Add also	 Don't add also
 Suppress	 Don't suppress
 Include	 Don't include

A corresponding reverse option appears once a filter selection has been made.

Examples of using file property filters

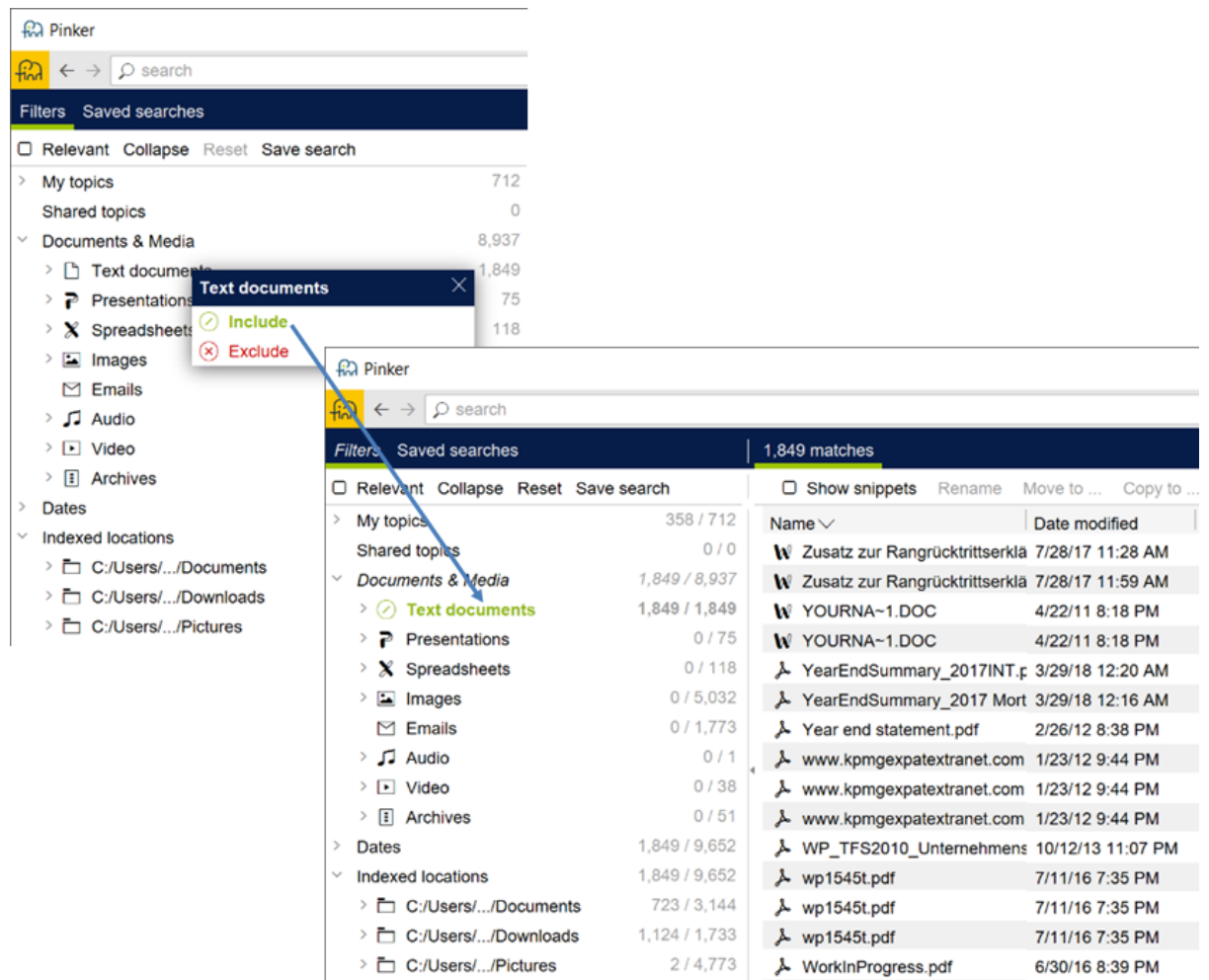
The following examples illustrate applying a combination of the set operations to file property filters.

Example of using “Include” and “Exclude”:

Goal: Find all files that are text documents

Steps:

- Right-click “Text documents” to bring up its context menu, and
- Select “Include”



The Results area now only shows the files that are text documents stored in your indexed locations. Note that once you have selected “Text documents> Include” all other filters under “Documents & Media” show zero matches for the first match count number. The “Dates” and “Indexed locations” filters have been updated to reflect the same match count as the filter selected. The second match count next to each file property filter is the total of files matching each corresponding filter that exist in your indexed locations while for the indexed locations it is the total of files in each folder meeting the “Text documents” criteria.

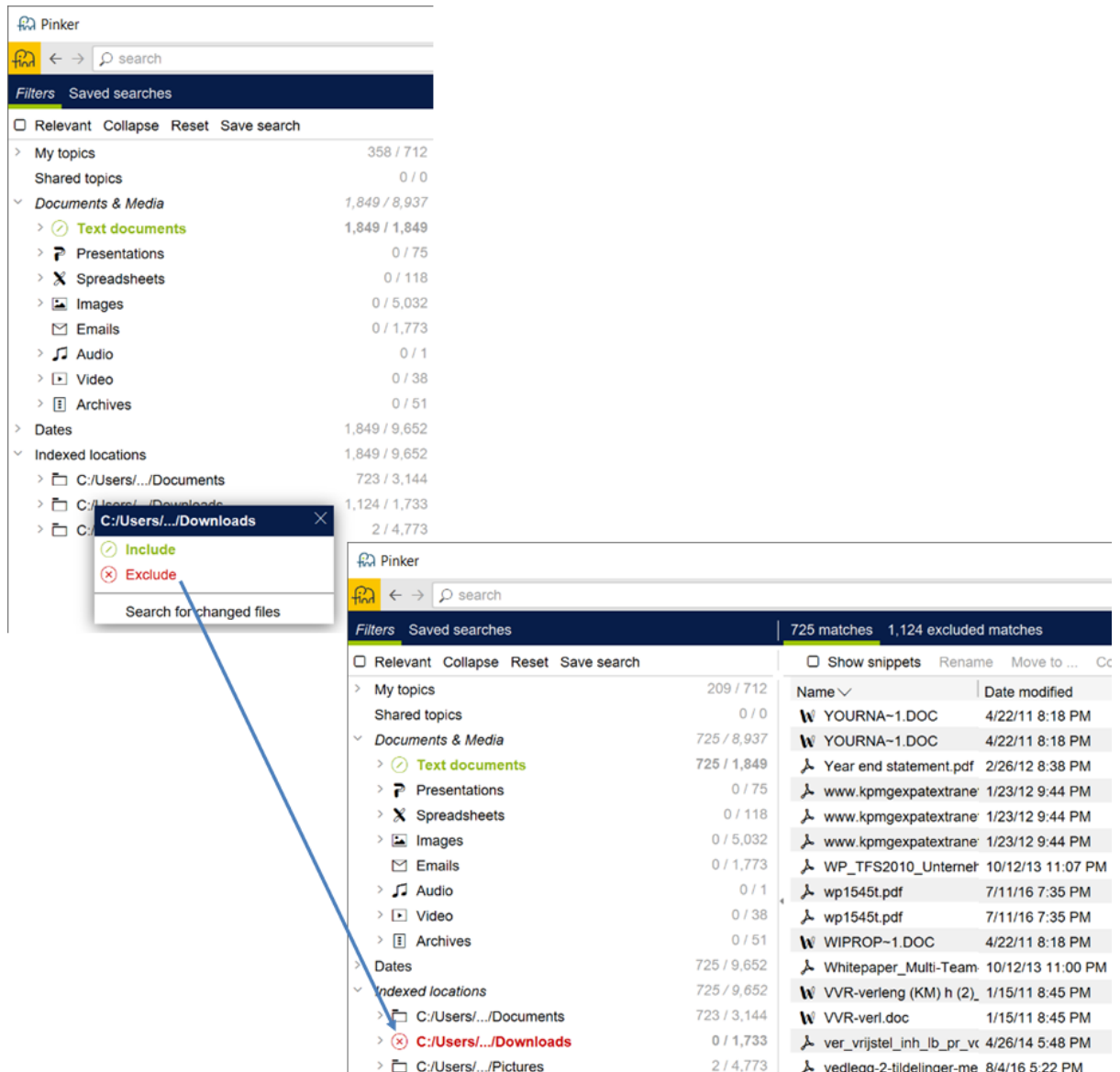
Once the files matching “Text documents” are shown in the Results area, you can browse the result set using the filters or further refine your search by applying a combination of more filters as explained in the next example.

Apply “Exclude” to the results of “Include”:

Goal: Exclude all files from the content in the Results area that are located in the Downloads folder.

Steps:

- Right-click “Downloads” to bring up its context menu, and
- Select “Exclude”



Now the Results area shows the 725 text documents from different file locations except from those stored in the Downloads folder. The new match count for each filter has been updated accordingly. Note that the Downloads filter match count is zero.

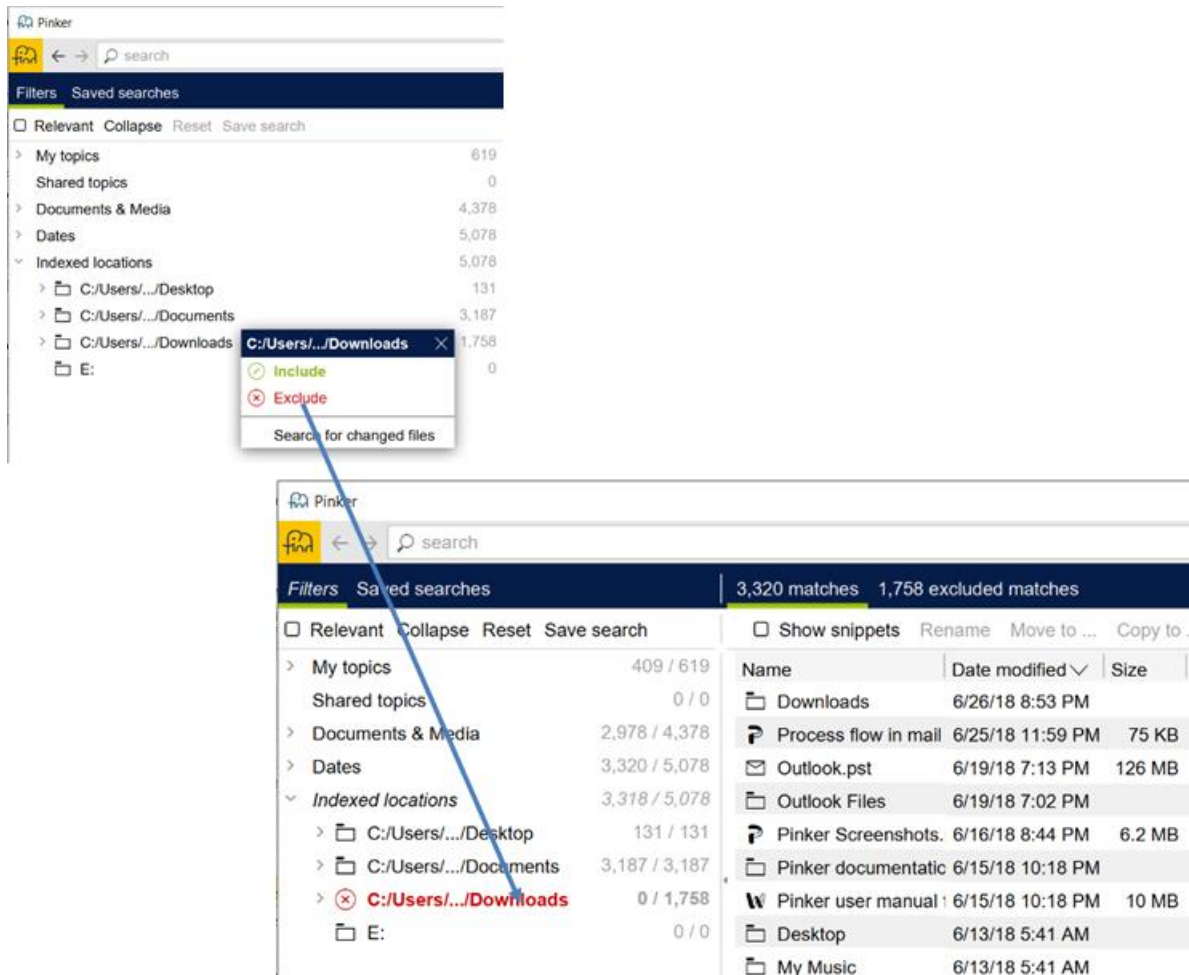
The second match account next to each file property filter is the total of files matching that specific filter that exist in your indexed locations while for the indexed locations is the total of files in each folder matching the “Text documents” criteria.

Example of using “Exclude” and “Include”

Goal: Exclude all downloaded files from the content in the Results area and find all PDF files from the resulting set.

Steps:

- a) Right-click “Downloads” to bring up its context menu, and
- b) Select “Exclude”



The Results area contains all indexed files except those in the Downloads folder, this is indicated by the 0 count match next to the filter. After using “Exclude” there is a total of 3320 files (5078-1758) in the Results area. The excluded documents can be viewed under the tab ‘1758 excluded matches’. All the other filters have been adjusted to reflect their new match counts.

The second match count next to each file property filter is the number of files matching the corresponding filter that exist in your indexed locations while for the *Indexed locations* is the sum of the files on each folder.

- c) Right-click “Acrobat PDF” filter to bring up its context menu, and
- d) Select “Include”



Out of the 5078 (contained in other folders different from the Downloads) files there are 322 pdf files, now shown in the Results area. The match count of each filter has been updated to reflect how they are matched by the files contained in the Results area. The second match count next to each file property filter is the number of files matching the corresponding filter that exist in your indexed locations while for the *Indexed locations* is the sum of files on each folder.

To reset the selection of a set operation use the option presented in the context menu (below). The “Don’t include” and “Don’t exclude” options appear once a filter has been set to “Include” or “Exclude”, respectively.



Examples of using topic filters

The following examples illustrate the application of set operations to Topic Filters. A key aspect when combining topic filters is the difference of applying “Require - Require” versus applying “Require-Add also”:

Require-Require	All files in the Results area that do not match at least one keyword in each of the two topic filters selected as “Require” will be excluded from the content of the Results area, i.e. every file displayed in the Results area will contain at least one keyword from each of the two “Required” branches.
Require-Add also	The content of the Results area will be composed of files that match at least one of the keywords in the “Require” branch plus all files that match any keyword in the “Add-also” branch.

In contrast to file property filters such as file type (where a file can only have one type), set operations on topic filters deal with combinations of keywords. Pinker offers two approaches to analyse the content on your storage devices:

1. By providing match counts (see Understand filter match counts), and
2. By highlighting the topic terms that are contained in a selected file, as shown below.

The screenshot shows the Pinker application interface. At the top, there's a search bar with the text 'search'. Below it, a navigation bar shows 'Filters' and 'Saved searches' tabs, with '75 matches' displayed on the right. The main interface is divided into two columns. The left column is a tree view of filters. Under 'My topics', there are sub-topics: 'Conference' (388), 'Bank' (274), and 'Investment' (278). Under 'Documents & Media', there are 'Text documents' (1,849), 'Presentations' (75, highlighted in blue), 'Spreadsheets' (118), and 'Images' (5,032). The right column shows a list of files with columns for 'Name' and 'Date modified'. The files listed are: 'WIPROB~1.PPT' (4/14/11 11:04 PM), 'Use of Content Filters.ppt' (12/21/16 4:09 AM), 'Technology2.ppt' (6/27/16 11:25 AM), 'Technology.ppt' (6/27/16 2:22 PM), 'SPEpowerpoint.ppt' (3/20/09 3:07 PM, highlighted in blue), 'Slides for Pinker.pptx' (6/2/17 12:15 AM), 'Screen shots.pptx' (12/7/16 9:14 PM), 'SAICWO~4.PPT' (9/29/09 8:33 AM), and 'saicwo~1.ppt' (9/18/09 12:34 AM).

In this example, “Presentations” has been used to filter out all the presentations contained in the “Indexed locations”. Then with a left click action on the fifth item of the results area revealed that the file SPEpowerpoint contains the term ‘Conference’ which is highlighted under “My topics” filters.

The following examples illustrate the application of set operations to topic filters.

Example of using “Require”

Goal: Find all files that contain the topic “Investment”

Steps:

- Right-click the “Investment” topic to bring up its context menu, and
- Select “Require”

The screenshot shows the Pinker application interface. On the left, a sidebar lists various filters and topics. The 'Investment' topic is selected, and its context menu is open, showing options like 'Require', 'Exclude', and 'Suppress'. The 'Require' option is highlighted. The main area displays a list of search results for the 'Investment' topic, showing 278 matches. The results are organized into sections: 'My topics', 'Shared topics', 'Documents & Media', and 'Indexed locations'. The 'My topics' section shows the following data:

Topic	Match Count	Total Indexed Files
Conference	91	388
Bank	133	274
Investment	278	278

The 'Results' area on the right shows a list of documents with columns for Name, Date modified, and Size. The list includes various files such as 'YearEndSummary_20...', 'www.kpmgexpatextra...', 'wp1545t.pdf', and 'Tender_Guidance_Dc...'. The 'Investment' topic is highlighted in the filters, and the 'Require' option is selected in the context menu.

The Results area shows the context of the set of documents that contain the topic “Investment”. Before applying “Require” to the “Investment” filter the match count next to each topic filter indicates how many files, out of the total files indexed (9652 in this example), contain the name of the respective topic. From the example above it can be seen that there are 388 files out of the 9652 files that refer to the topic “Conference”.

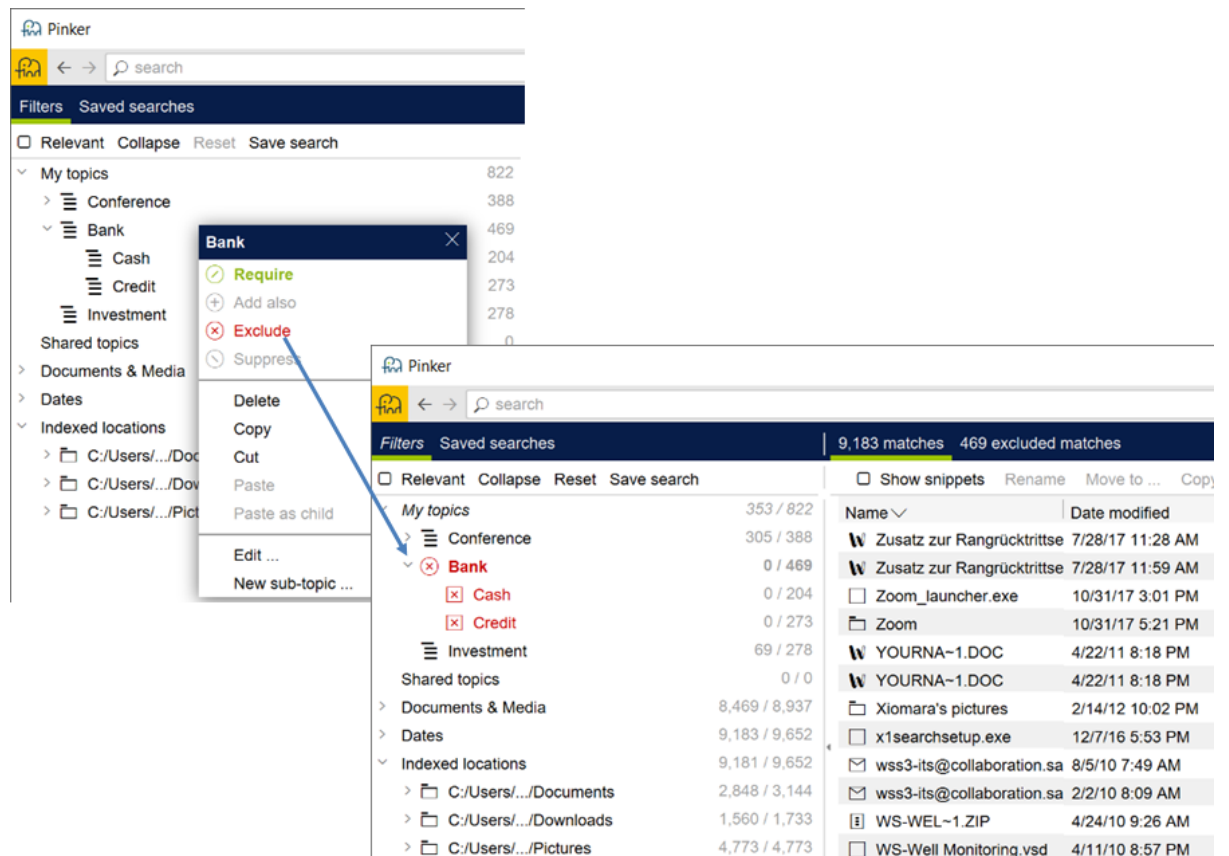
After applying “Require” to “Investment” it is shown that 91 files out of the 278 containing investment in the results set also contain the topic “Conference” i.e. that there are 91 files that have both topics “Investment” and “Conference”. Note that in this simple example each topic consists of exactly one keyword.

Example of using “Exclude”

Goal: Exclude all files that contain the topic “Bank”, i.e. all the files that contain the keyword bank and any of the keywords listed under the “Bank” topic will be removed from the result set shown in the Results area.

Steps:

- Right-click the “Bank” topic filter to bring up its context menu, and
- Select “Exclude”



In this example there were 469 items that either the file name or its content included the term “Bank”, “Cash” or “Credit” or a combination of these terms. After an “Exclude” set operation is applied to a topic filter, a new tab appears in the heading of the Results area to show what specific files have been removed from the results set. From this tab you can perform file management tasks as described in the File operations section.

Refine the specification of a set operation

Filters are defined in a hierarchical structure, and Pinker allows users to control which descendants in a filter branch participate in a set operation. This is done by toggling off/on descendant branches.

Example of using Toggle off/on with “Include” set operation

Goal: Find all files that are text documents except Microsoft Word files.

Steps:

- Right-click “Text documents” filter to bring up its context menu
- Select “Include”
- Right-click the “MS Word” filter to bring up its context menu (Note that the option to “Toggle off” appears in the menu)
- Select “Toggle off”

The image consists of two screenshots of the Pinker application interface, illustrating the process of refining a search set by toggling off a filter.

Top Screenshot: The interface shows a search for "1,873 matches". The left sidebar displays a filter tree under "Documents & Media". The "Text documents" filter is selected and checked, with a count of 1,873 / 1,873. Under it, the "MS Word" filter is also checked, with a count of 186 / 186. A context menu is open over the "MS Word" filter, showing the option "Toggle off".

Bottom Screenshot: The interface shows a search for "1,687 matches". The "Text documents" filter remains checked, but the "MS Word" filter is now unchecked, with a count of 0 / 186. The total match count has decreased from 1,873 to 1,687. The list of files in the main pane is updated to exclude the 186 MS Word files.

There were 186 MS Word files in the content of the Results area which are no longer included after toggling off the filter “MS Word”. The match counts of all filters have been updated to reflect how the contents of the Results area match each filter. The use of “Include” and “Toggle off” allows the user to selectively remove those files from the result set that match the filter being applied.

Example of using Toggle off/on with the “Exclude” set operation

Goal: Find all files, except text documents other than Microsoft Word files.

Steps:

- a) Right-click the “Text document” filter to bring up its context menu
- b) Select “Exclude”
- c) Right-click the “MS Word” filter to bring up its context menu with the option to toggle off
- d) Select “Toggle off”



In this example, toggling off MS Word files brought back 186 Microsoft Word files to the content of the Results area. These files had been excluded initially when the “Exclude” set operation was applied to the “Documents & Media” filter. All filter match counts are updated to reflect the content of the Results area.

Toggle off and on filters from the topic filters work in the same way as with file property filters. Note that the result set on the ‘# removed matches’ tab changes when using “Toggle off” after an “Exclude” action. To undo the results of toggle off, after an “Include” or “Exclude” action, right-click on the corresponding filter and select “Toggle on” from the context menu.

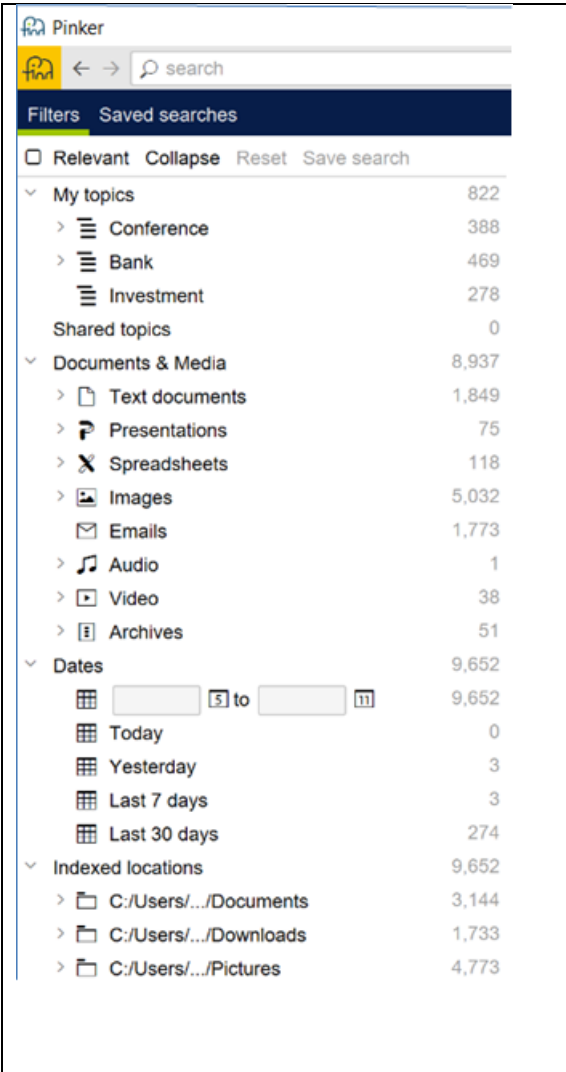
Understand filter match counts

Pinker counts all items that match the current combination of filter settings and search expression. The counts are dynamically updated each time:

1. Pinker updates the index;
2. the user changes a filter setting or search expression ;
3. the user edits topics.

See the following examples (note that browsing by filter does not affect match counts):

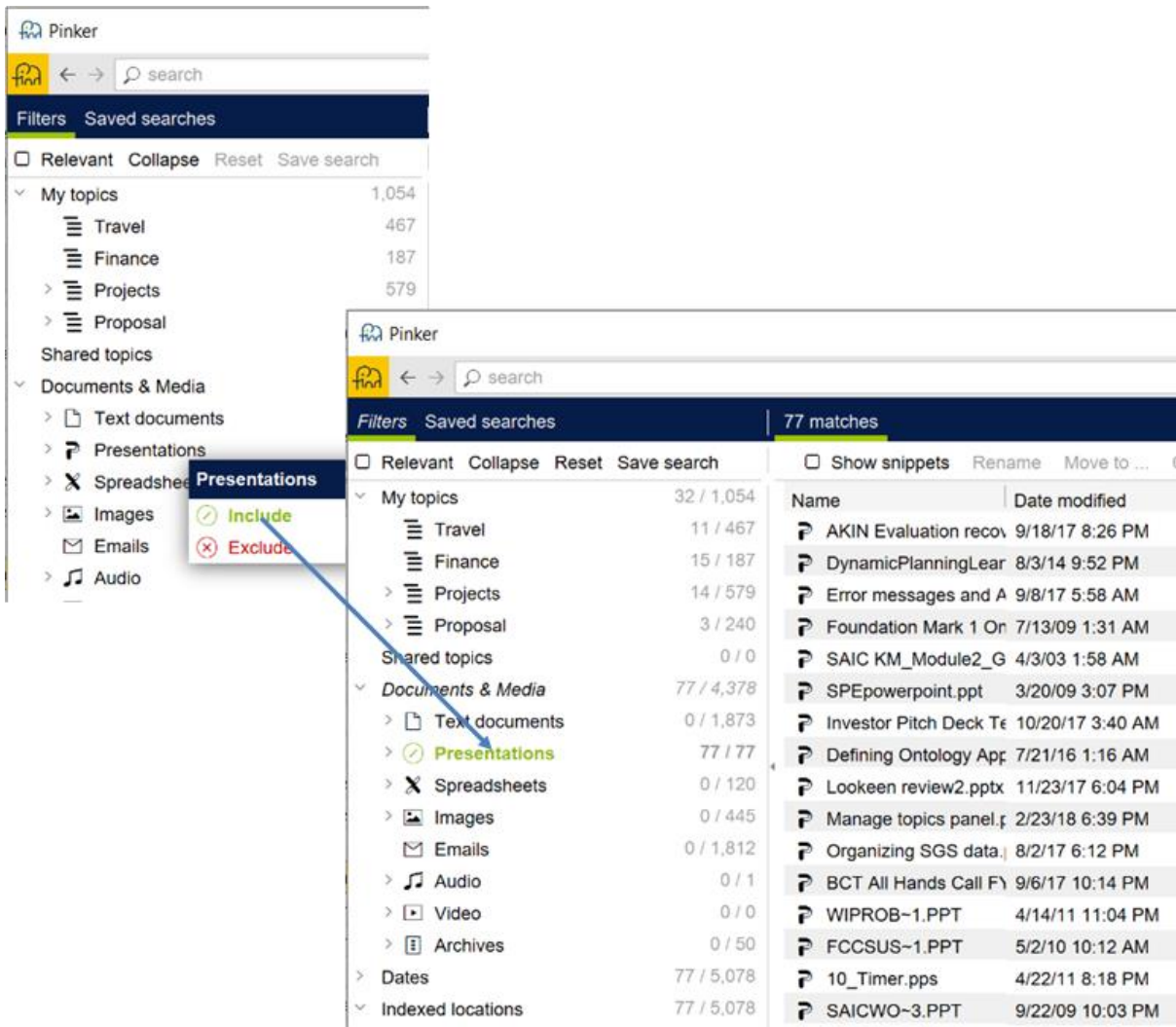
1. When Pinker indexes the files in the selected locations the filter match counts continue to update as indexing progresses. In the example below three folders on drive C: have been indexed.

 <p>The screenshot shows the Pinker application interface. At the top, there is a search bar and a 'Filters' tab. Below the search bar, there are buttons for 'Relevant', 'Collapse', 'Reset', and 'Save search'. The main area displays a list of filter categories and their corresponding match counts:</p> <ul style="list-style-type: none">My topics: 822<ul style="list-style-type: none">Conference: 388Bank: 469Investment: 278Shared topics: 0Documents & Media: 8,937<ul style="list-style-type: none">Text documents: 1,849Presentations: 75Spreadsheets: 118Images: 5,032Emails: 1,773Audio: 1Video: 38Archives: 51Dates: 9,652<ul style="list-style-type: none">Today: 0Yesterday: 3Last 7 days: 3Last 30 days: 274Indexed locations: 9,652<ul style="list-style-type: none">C:/Users/.../Documents: 3,144C:/Users/.../Downloads: 1,733C:/Users/.../Pictures: 4,773	<p>Pinker counts all files matching the Topic filters under “My topics”. Files matching multiple subtopics are counted once for each matched subtopic but are counted only once for the parent “My topics” match count. For example, if a document contains the words ‘conference’ and ‘investment’ it is counted as one match for the “Conference” filter and one match for the “Investment” filter but only once in “My Topics”.</p> <p>Pinker counts all files matching the “Documents & Media” filter groups. There are eight file property filter groups under “Documents & Media” that pertain to file types. Pinker counts all files that match a particular type. The individual match counts are added up for the total match count of “Documents & Media”. Note that this is different from the match counts for topics, as a file can contain many keywords but only has one file type.</p> <p>The counts for “Dates” and “Indexed locations” work like the counts for “Documents & Media”.</p> <p>This single count associated with each filter represents the number of files in the total of files indexed e.g. In this example, there are 278 files in 9652 that contain the term ‘investment’. This count is displayed by itself as long as no search is active.</p>
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2. Each time the user changes a filter setting or search expression.

Consider the example of finding all presentations that exist in the “Indexed locations”. Steps are:

- Right click "Presentations" to bring up its context menu
- Select "Include"



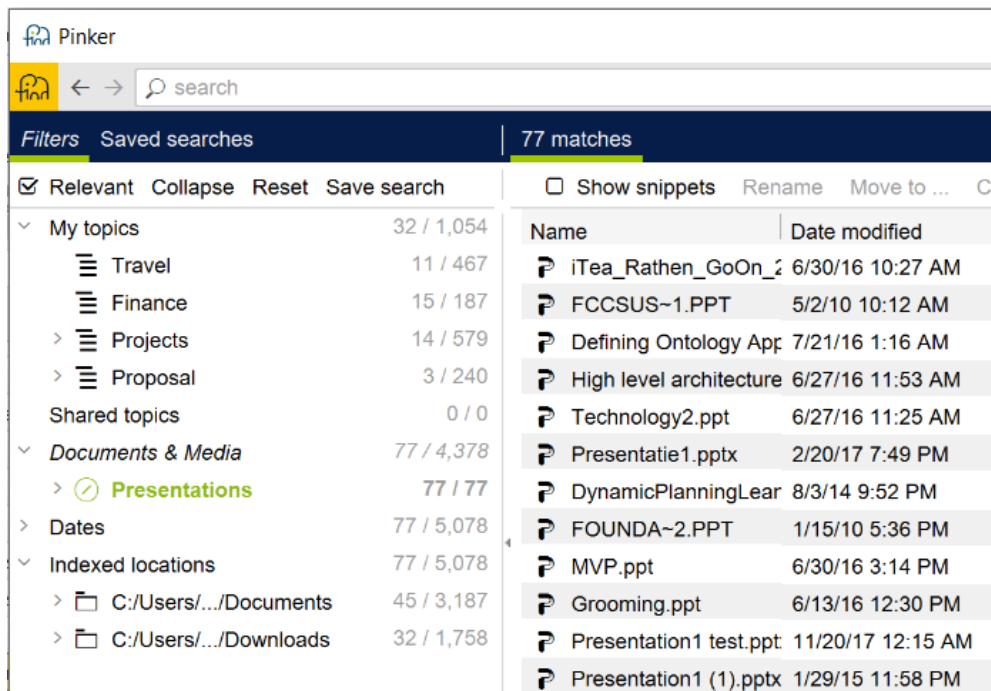
Pinker displays all 77 files that are presentations in the Results area and updates the match count of each filter. Now the first number in the total count match of "Indexed locations" is the same as the first number in the total count match in "Documents & Media" and in "Presentations". You have selected the set of files to work with; further filter combinations will allow you to home-in on the files of interest

When a set operation is applied to a filter such as "Include" in this example, a new match count is computed taking as a basis the content of the result set. This is shown as the first number in the example above. The second number has been computed using as a basis the total of files indexed, 5078 items in this case.

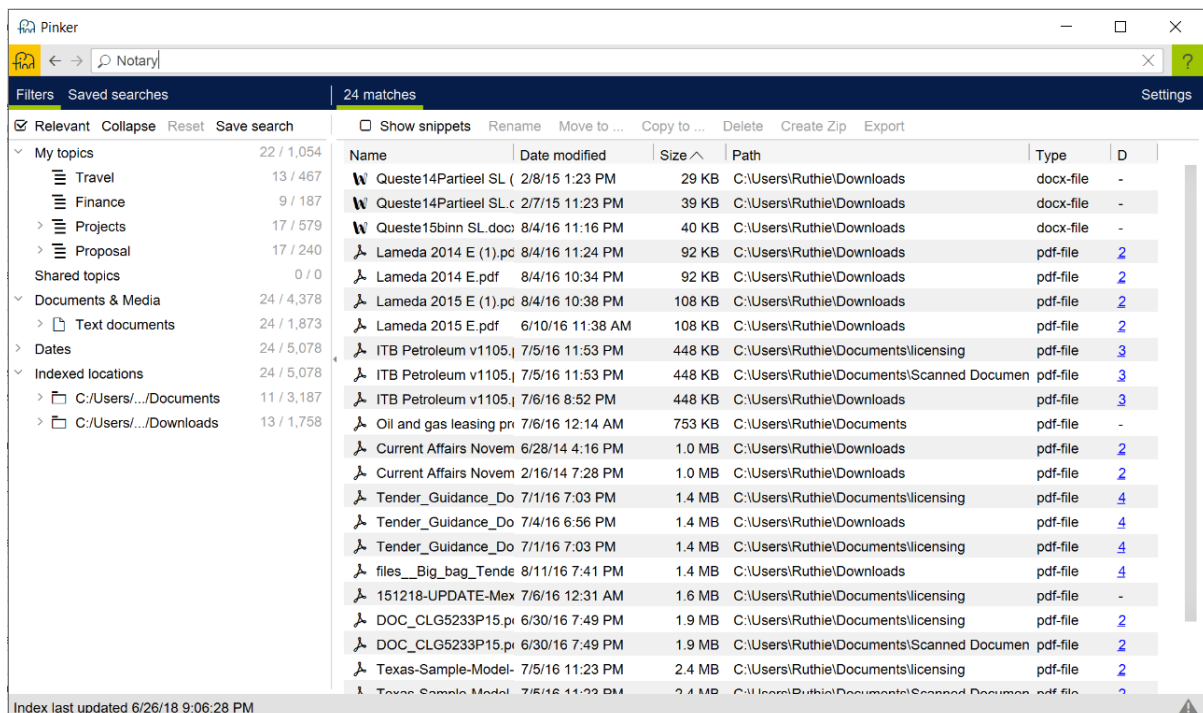
The match counts show how many presentations match each of the topics filter. In this example there are 32 presentations containing one or any combinations of "My topics" branch keywords.

Show filters with matches only

Note that some of the match counts (first number) of the file type and indexed locations filters are zero. By selecting "Relevant", all the zero match count filters will be hidden as shown below:



Similarly if a word is typed in the search field, all match counts are updated accordingly. In the example below by typing `Notary` into the search field, the following result set is obtained and all the filter match counts are updated to reflect the content of the files matching the term typed.



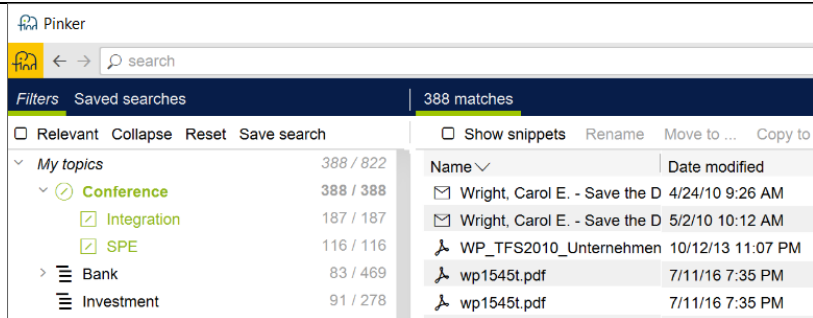
In this example there are 24 files out of 5078 matching the term `Notary` and nine of them contain the term 'finance' as indicated by the match count next to that topic. From the "Documents & Media" match count of 24 it can be inferred that all of the files are text documents. It can also be inferred that most of the files are spread across the "Documents" and "Downloads" folders. The match count next to each filter helps to make decisions on where to focus your analysis.

Work with saved searches

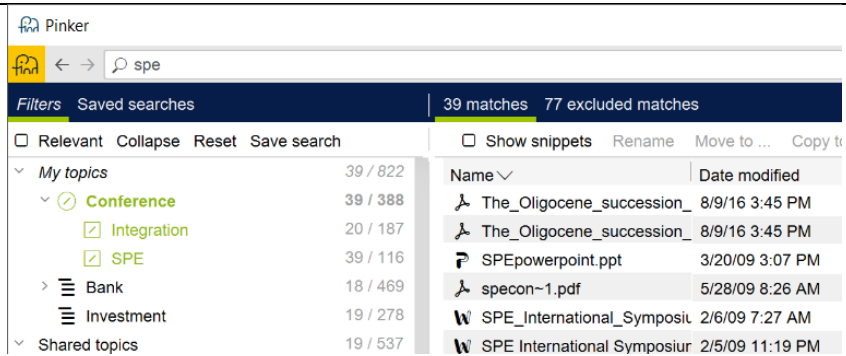
Pinker allows you to save any combination of filter settings and expressions in the search field under a name, effectively creating shortcuts to sets of files that you would like to access repeatedly. Each time a search is saved under a name, it gets added to the *Saved searches* list.

The following example illustrates how to create an entry into the *Saved searches* list.

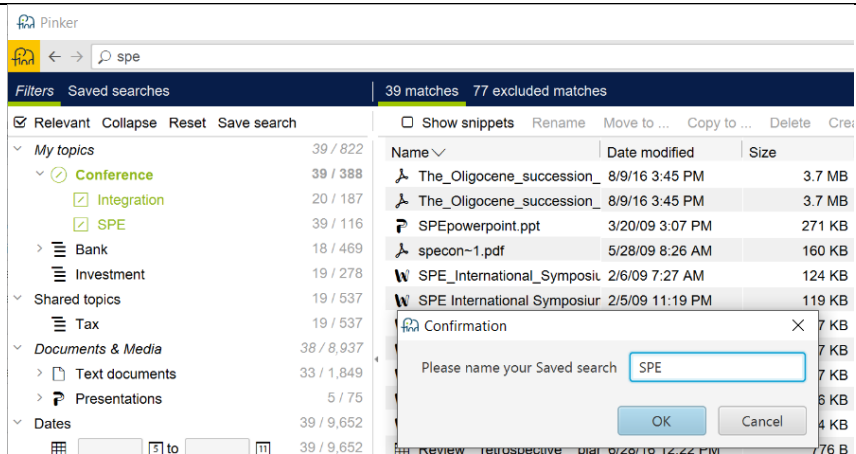
Right-click on the “Conference” filter brings up the context menu and by selecting “Require” the result set containing 388 files is shown in the Results area



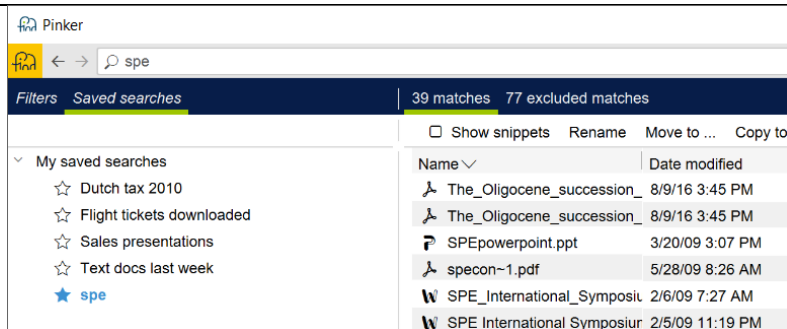
Typing “spe” in the search field and applying “Exclude” to “Emails” filter will reduce the file set to just 39 matches



Left-click the Save search button brings up the confirmation menu. In this example, “SPE” is entered as a name. Pressing “OK” adds the name to the *Saved searches* list and the “Save search” is disabled for this search.



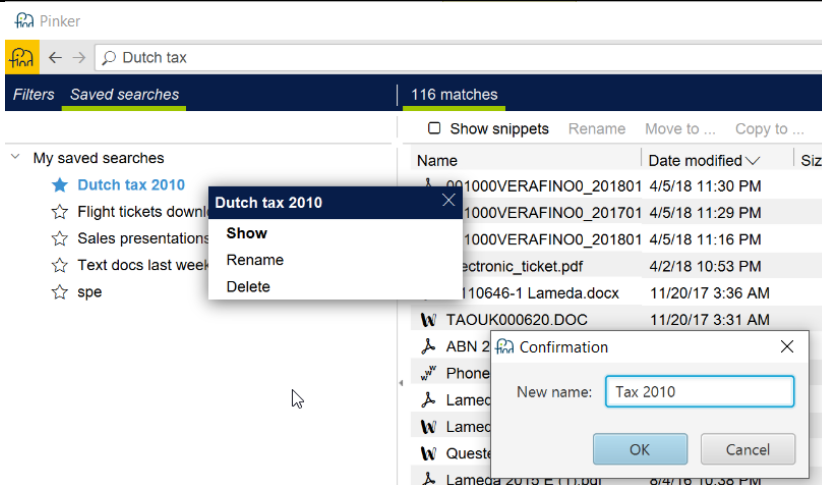
Left-click on *Saved searches* switches to the saved searches panel, highlighting the currently active saved search



You can rename or delete a saved search as follows:

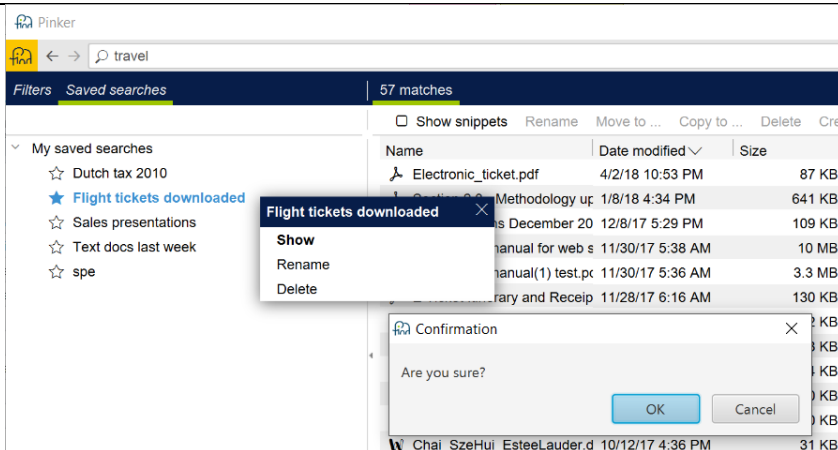
Rename:

- Right-click on a Saved search to bring up the context menu
- Select “Rename” to bring up the confirmation window
- Enter the new name and press “OK”



Delete:

- Right-click on a saved search to bring up the context menu
- Select “Delete” to bring up a confirmation window
- Press “OK” and the saved search is excluded from the *Saved searches* list



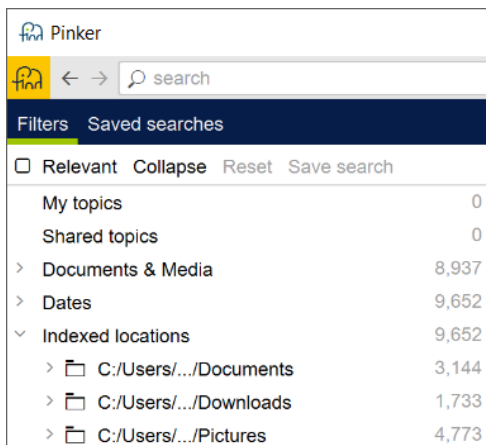
Remember that *Saved searches* save all the specifications of a particular search. If you select a saved search and then apply further filters, the saved search becomes inactive. Changes you make will not be saved automatically. Note that you cannot save browsing states – just Pinker set operations and keyword searches.

Work with Topics

Think of topics as collections of keywords that characterise a topic and that you would typically use when you search for documents. Topics reflect your choice of what kind of information is important for you to browse and access on a regular basis. Topics can have sub-topics and can have **synonyms**. A topic and its sub-topics together are referred to as a **topic branch** or in short, a branch. A topic establishes a context through its topic keywords, simply because many topic keywords will tend to appear together in a document that covers that topic.

Define topic filters

With “My topics” filter you can build your own topics and sub-topics, these topics are for your own use but you can also build topics to share with others through the “Shared topics” filter option.



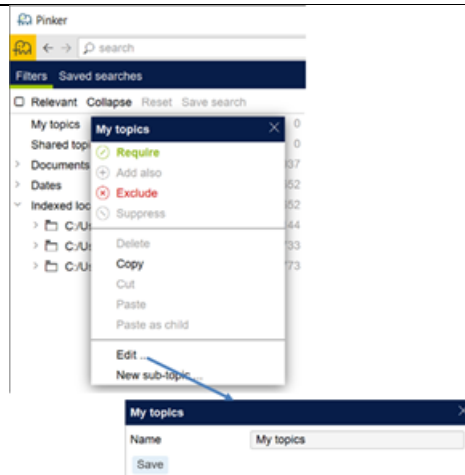
Match count next to “My topics” and “Shared topics” filters are set to zero after the initial installation of Pinker as there are no topics defined yet at that moment. “My topics” in essence is a way to organise the content of your connected drives including cloud drives into virtual folders.

To define and manage your topic’s filters right-click “My topics” to open the context menu. The “Edit” option allows you to personalise the name of “My topics” to anything that you feel is more representative of the content of your storage devices.

To change the name of “My topics” to “Main topics”:

- Type “Main topics” in the ‘Name’ field
- Right-click “Save”

“My topics” is changed to “Main topics” in the *Filters* panel.



To create and manage topics left-click the “New sub-topic...” button to open the following screen:

The “New sub-topic” screen will allow you to make changes to “My topics” filter as follows:

Create topics:

- Type the name of the topic in the ‘Name’ field
- Add a synonym by typing the name in the field provided and press “Add”. Repeat this until all synonyms have been added. You can eliminate a synonym by pressing the X next to it
- Press the “Create” button

In this example the “Vacation” topic has been added under “Main topics” with three synonyms.

By clicking the symbol “>” next to the topic’s name, the synonyms of the topic are shown with the match count next to it i.e. number of files containing the synonym term. In this case there are six files containing the term ‘Summer time’, eight with ‘Spring break’ and five with ‘School break’. Note that these files are not mutually exclusive.

Filter	Count
My topics	149
> Vacation	149
Shared topics	0
Documents & Media	8,937
Dates	9,652
Indexed locations	9,652

Sub-filter	Count
Synonyms of Vacation	149
S Summer time	6
S Spring break	8
S School break	5

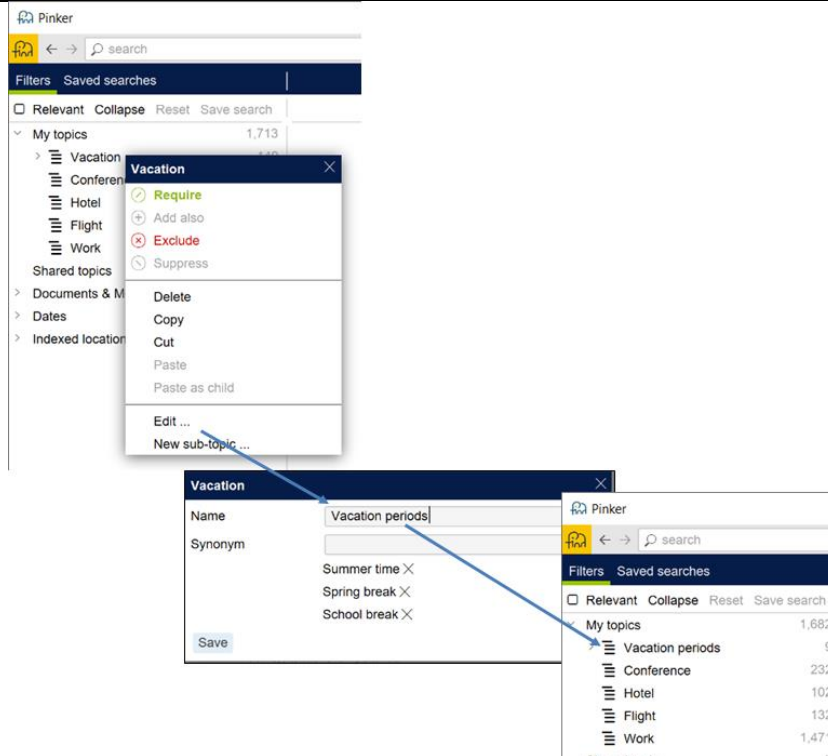
Each topic under “Main topics” can have further sub-topics, allowing you to create a tree structure of topics and subtopics. Below are some illustrations of managing topics.

Rename a topic:

- Right-click in the topic
- Select “Edit”
- Type the new name in the ‘Name’ field
- Press “Save”

The new name is updated in the *Filters* panel. In the example shown “Vacation” has been renamed as “Vacation periods”

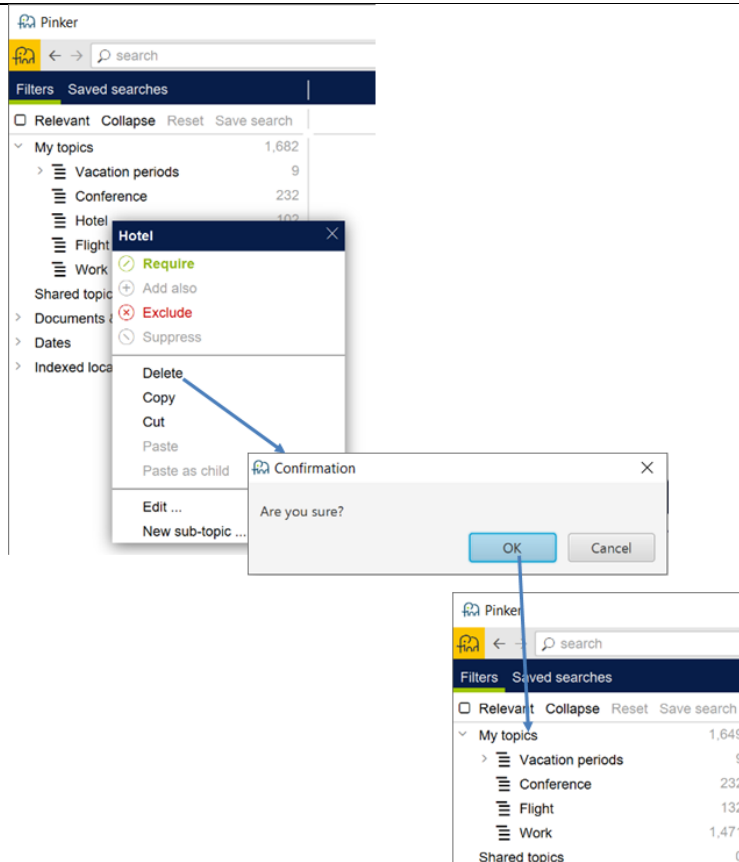
The match count now reflects the new matches for “Vacation periods”



Delete a topic:

- Right-click the topic
- Press “Delete”
- Press “OK” in the confirmation dialogue

In the example shown “Hotel” is being deleted and the *Filters* panel is updated to reflect the change. **Note** that with a topic branch a delete action will remove the entire branch i.e. all its descendants are deleted.

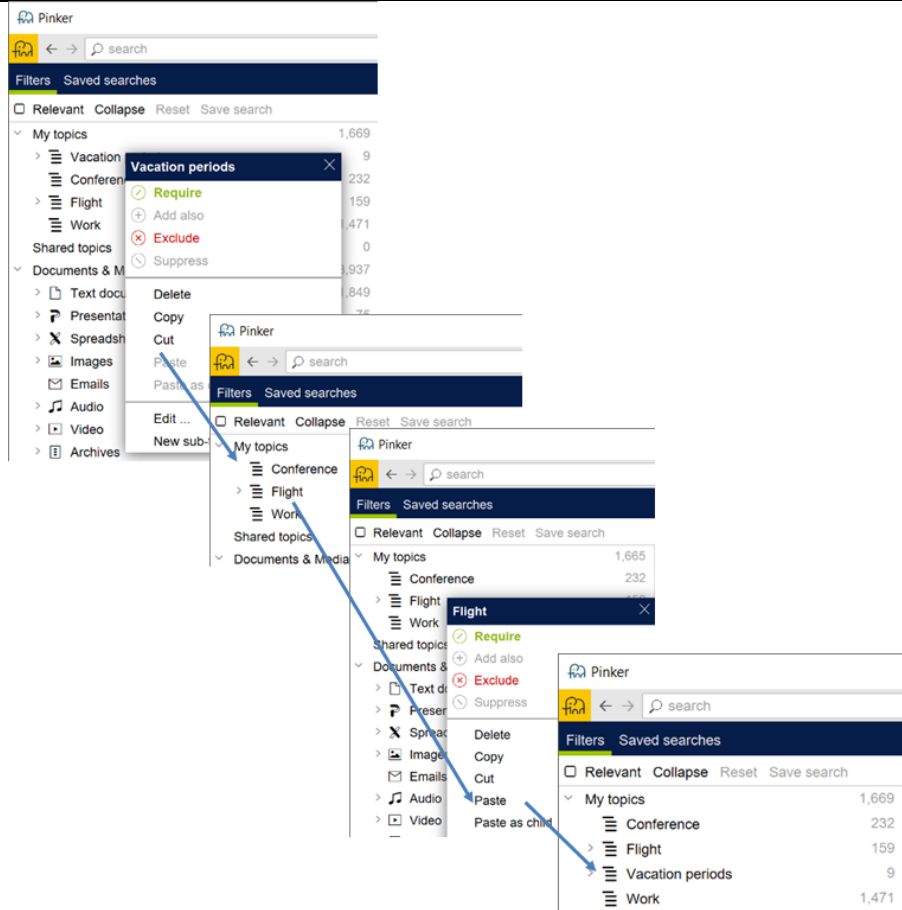


Copy, cut and paste a topic allow you to easily change your topics structure. The “Paste” and “Paste as child” become available after a “Copy” or “Cut” action has been selected.

An example of using “Cut” to organise alphabetically the topics is as follows:

- Right-click “Vacation periods” topic
- Select “Cut”
- Right-click “Flight”
- Press “Paste”

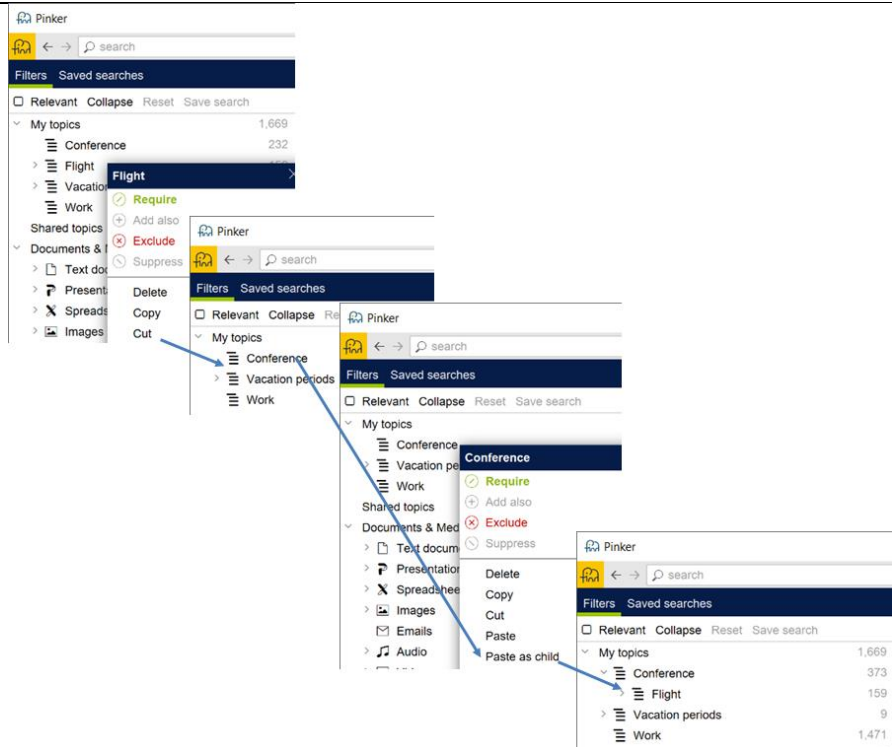
The *Filters* panel is updated showing “Vacation periods” topic after “Flight”. The match count remains unchanged



Move an existent topic as descendant of another topic

- Right-click the topic of interest
- Press “Cut” or “Copy”
- Right-click the topic that will become the node of the cut or copied topic
- Press “Paste as child” in the context menu

In this example “Flight” has been changed from being a main topic to a sub-topic of the “Conference” topic.



The “New sub-topic...” screen of a topic allows you to add synonyms; this is very helpful when dealing with files providing same information without standard naming convention.

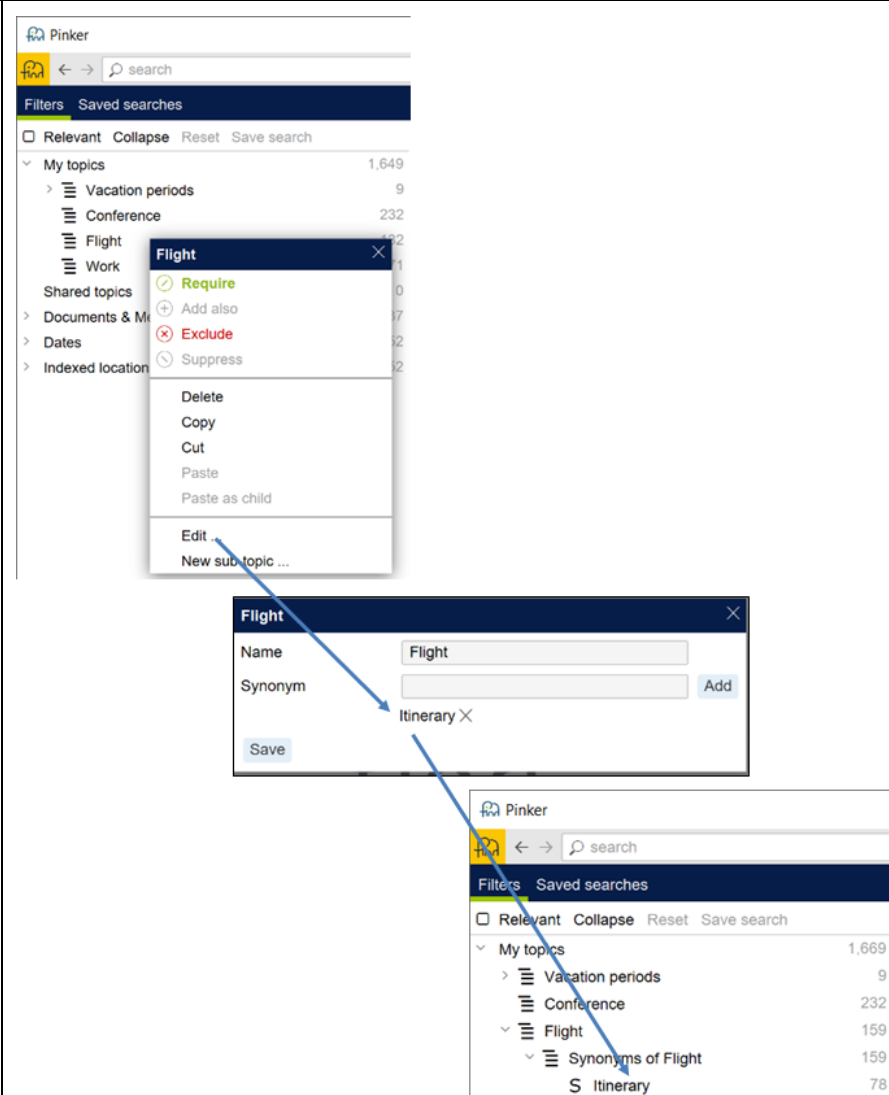
Key aspect to consider when adding synonyms:

1. they can be added at all levels of a branch
2. they are shown as children of the filter parent with an “S” in front of their names
3. they can be used in set operations
4. you cannot add a synonym to a synonym
5. they will appear in a list on the “New sub-topic...” screen of the corresponding topic name

Synonyms or related terms can be added and/or deleted at any time to topics and subtopics. The following example illustrates how to add synonyms to a sub-topic filter.

- Right-click the sub-topic name opens the context menu
- select “Edit”
- Type the synonym in the corresponding field and press “Add”.
- Press “Save”

In the example shown “Itinerary” has been added to the “Flight” subtopic as a synonym. In this case there are 78 files in the indexed locations matching the added synonym. You can browse the files containing the synonym or use it in combination with other filters to find the file of interest.



How to identify topics

Topic filters are usually unique to each Pinker user as they are the means to find and organise his or her documentation and save them for future reference. Defining the topics properly is fundamental to home-in quickly on the information of interest. It is recommended to distinguish between specific topics and generic topics. Specific topics pertain to some area of expertise, knowledge, discipline, know-how or interest for which you want to find files on a regular basis. Generic topics refer to common aspects of the specific topics and typically cut across more than one specific topic. Below are some examples of specific and generic topics per job role and area of interest.

Job role: Business Consultant

		Specific topics		
		Knowledge management (KM)	Process analysis (Improvement) • Process model	Smart Fields (ifield, Field of the future)
Generic topics	Proposals and projects • Plan • Budget • Resources	✓	✓	✓
	Clients • Amerada Hess • BP • ENI • Shell • Unocal	✓	✓	✓
	Measurement (KPI)	✓	✓	

In this example, all specific topics have synonyms (shown in parentheses) and one has a subtopic; two of the generic topics have subtopics and one has a synonym for a total of 20 topic filters. Combining these filters will allow the business consultant to quickly home-in on information of interest. One such combination is illustrated below. In this case there are 3542 files matching the “My topics” filter. The Business Consultant needs to find *all documents on knowledge management involving the Amerada Hess client that contain a plan and a budget*.

Applying the set operation “Require” to four of these topics yields a result set of 18 matches as shown below.

<p>1060 files (from 9767 indexed files) match the “Knowledge management” filter</p>	<p>104 files match the “Knowledge management” and “Amerada Hess” filters</p>	<p>74 files match the “Knowledge management”, “Amerada Hess”, and “Plan” filters</p>	<p>38 files match the “Knowledge management”, “Amerada Hess”, “Plan”, and “Budget” filters</p>
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Job role: College Teacher:

		Specific topics		
		Computer & Network Technician	Information Technology	Business Office Administration
Generic topics	Program <ul style="list-style-type: none"> • Students • Calendar • Grades 	✓	✓	✓
	Educational material <ul style="list-style-type: none"> • Online • Offline • Syllabus 	✓	✓	✓
	Teaching material <ul style="list-style-type: none"> • eBooks • Lesson plans • Test banks 	✓	✓	✓

In this case there are many possible combinations of filters as all the generic topics have subtopics.

Area of interest: Finance

		Specific topics		
		Investment	Income	Invoice
Generic topics	Bank <ul style="list-style-type: none"> Credit Cash 	✓	✓	
	Tax <ul style="list-style-type: none"> Federal 	✓	✓	

In this example, “Bank” has two subtopics while “Tax” has one subtopic for a total of eight topic filters. The combination of these filters will allow the user to quickly home-in on files of interest regarding finance. One such combination is illustrated below; in this case there are 1097 files matching the “My topics” filter. The case presented here is to find *all files on investment that includes income but are not associated with any tax*

By applying the set operation “Require” to two of these topics filters and “Exclude” to one topic filter yields a result set of 23 files matching the filters selected as shown below.

The image shows three sequential screenshots of the Pinker application's filter menu, illustrating how filters are applied to narrow down search results. Each screenshot shows a search bar and a list of filters under 'My topics'.

- Left Screenshot:** Shows the initial state with 195 files matching the "Income" filter. The "Income" filter is selected with a green checkmark. Other filters include Bank (137/492), Cash (88/222), Credit (84/232), Tax (152/471), Federal (91/246), and Invoice (33/151).
- Middle Screenshot:** Shows the application of the "Require" operation to the "Investment" filter. The "Investment" filter is now also selected with a green checkmark. The total number of files has decreased to 127. The "Tax" filter remains unselected.
- Right Screenshot:** Shows the application of the "Exclude" operation to the "Tax" filter. The "Tax" filter is now marked with a red 'X' and is unselected. The total number of files has further decreased to 23. The "Federal" subtopic under Tax is also marked with a red 'X'.

195 Files match the “Income” filter	127 files match the “Income” and “Investment” filters	23 files match the “Income”, “Investment”, and “Tax” filters
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Area of interest: Travel

		Specific topics		
		Vacation (Holiday)	Work	Conference <ul style="list-style-type: none"> • Integration • SPE
Generic topics	Hotel	✓	✓	✓
	Flight	✓	✓	✓
	Car rental	✓	✓	✓

In this example, the “Vacation” topic has a synonym while the “Conference” topic has two subtopics for a total of nine topic filters. The combination of these filters will allow the user to quickly home-in on files of interest regarding travel. One such combination is illustrated below; in this case there are 2644 files matching the “My topics” filter. The case presented is to find *all files on SPE that includes work but are not associated with any conference*.

By applying the set operation “Require” to two of these topics filters and “Exclude” to one topic filter yields a result set of 56 files matching the filters selected as shown.

171 files match the “SPE” filter	124 files match the “SPE” and “Work” filters	56 files match the “SPE”, “Work”, and “Conference” filters
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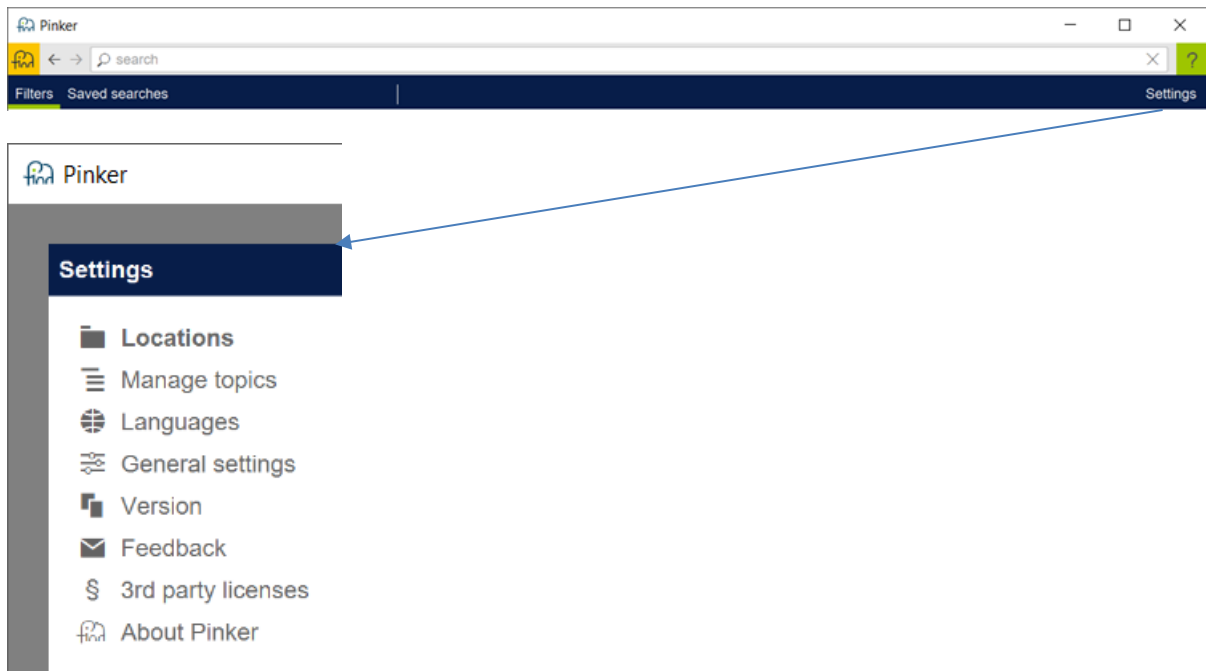
The goal is that by creating the topics filters you can easily create combinations that allow you to quickly find the specific file(s) that you need. Once you are satisfied with your selected topics' result set you can add this to the saved searches for future use.

Steps to create topics:

1. Identify from your area of interest the key themes or specific topics that you need to access regularly and need to know about quickly. These will become your main results set of files to work with.
2. Identify generic topics: think about common aspects that cut across more than one specific topic and between which you want to distinguish. When a generic topic applies to only one specific topic it may be better to add it as sub-topics of the specific topic.
3. Identify sub-topics for each topic if needed.
4. Identify synonyms, where applicable, to each topic.
5. Use the "Edit" option from the set operation menu or the "Manage topics" option from the Settings panel to create and change your topics.

Settings

The Settings panel can be accessed by pressing the settings icon (⚙️) in the right upper corner of the screen.

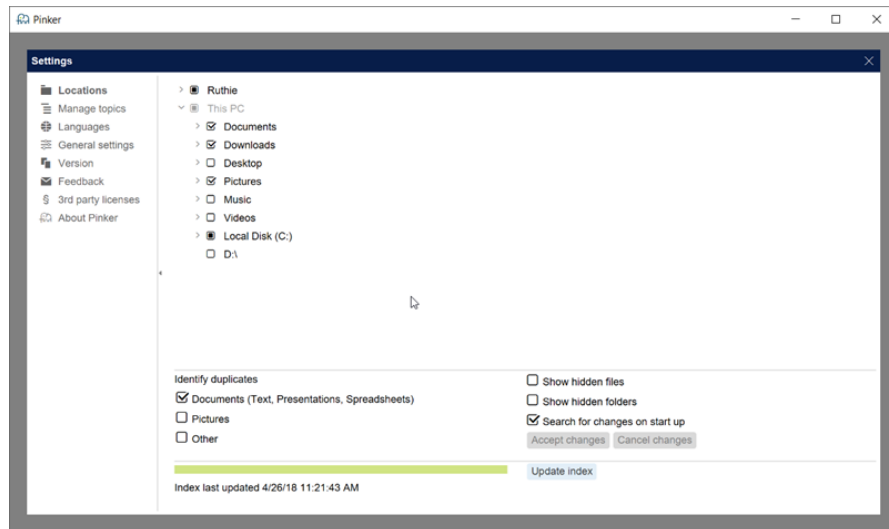


This panel allows you to change the choice of drives and folders to index, save current topic's structure and upload new one and select the language in that Pinker will operate. You can check the program's version here and send diagnostic feedback. It further provides information about 3rd party licensed software used by Pinker and in "About Pinker" lets you view and update your Pinker license.

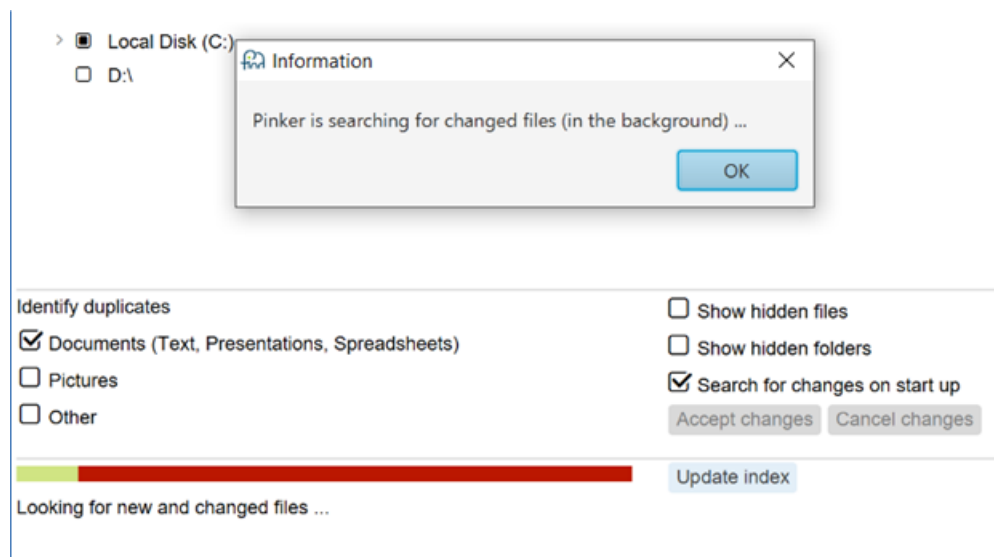
Indexing settings

The initial setting of your locations to index can be changed at any time, i.e. drives and/or folders added or excluded, via the Locations option of Pinker Settings panel. The "Locations" panel shows all the available drives and folders, indicating those currently indexed with a check mark. From this panel you can carry out the following actions:

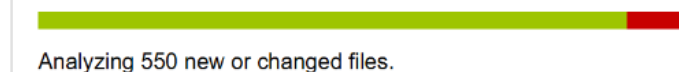
- Change the selection of file locations (drives, folders) to index by deselecting or adding other drives and folders from the drive and folder tree
- Change the option to identify duplicated files
- Include system files and/or hidden folders in the indexing process
- Update index or cancel the update



Left- click “Update index” will generate the following message:



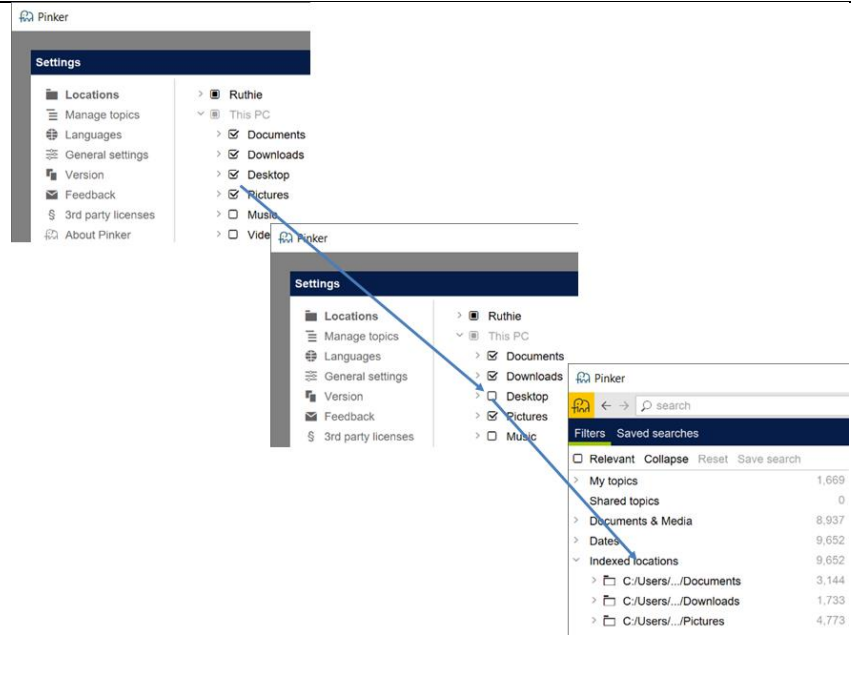
Once you press “Ok” the indexing process starts and the progress of updating the index is shown in the progress bar:



Here are some illustrations of removing and adding drives and folders to your “Indexed locations”.

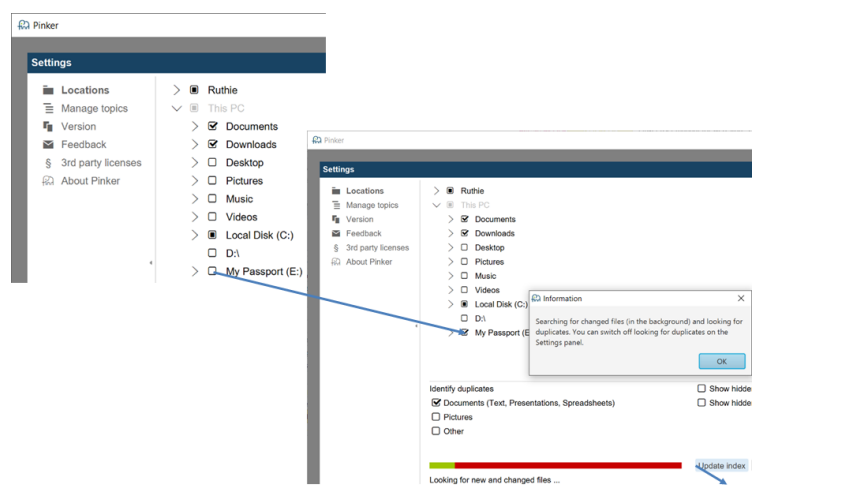
Exclude the desktop folder from current indexed locations

- Left-click the “Settings” option to open the settings panel
 - Left-click the check box next to desktop folder to deselect it
 - Left-click the ‘Update index’ button to update the indexed locations
 - Press “OK” in the confirmation dialogue
- The desktop folder is removed from the indexed locations and the index is updated.



Add an external drive E: to the indexed locations

- Left-click the “Settings” option to open the settings panel
- Left-click the check box next to the E: drive to select it
- Left-click the ‘Update index’ button
- Left-click “OK” in the information dialogue



When you press the ‘Update index’ button, Pinker

1. checks for new and changed files,
2. indexes the new and changed files, and
3. computes new match counts

You can close the Settings panel any time and return to the Pinker main screen where you can view the changes to the “Indexed locations” list.

Manage topics definitions


Once the topics have been identified and created in Pinker, they can be managed through the Settings panel. Pinker allows you to create many different filters using topics so you can analyse your data and information using different perspectives but you can work with one definition at a time. In

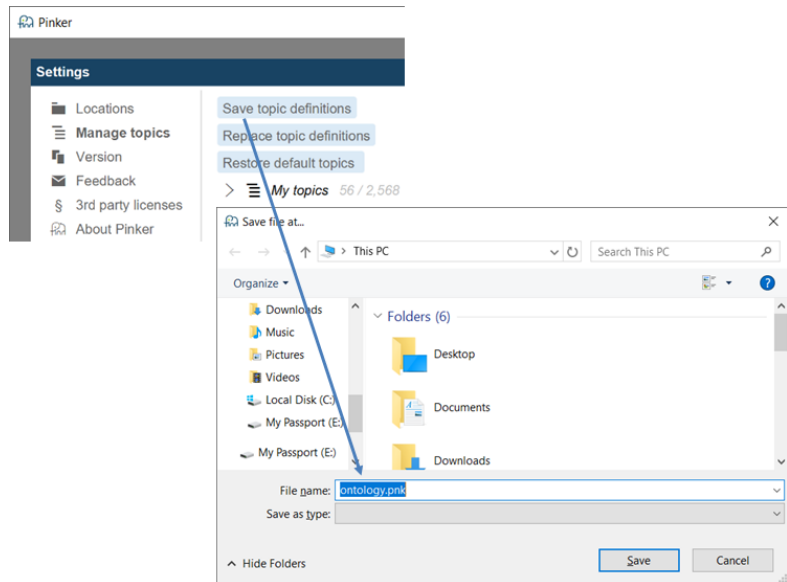
order to maintain and re-use these various topics filter, it is necessary to download and save existing definitions before creating new definitions.

The illustrations below show how to use the options of Manage topics.

Download current definitions of my topics:

Using the Settings panel:

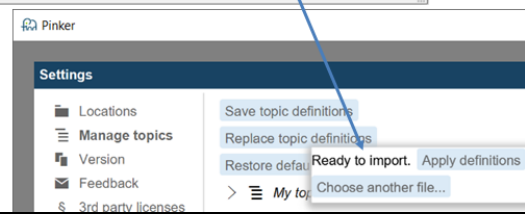
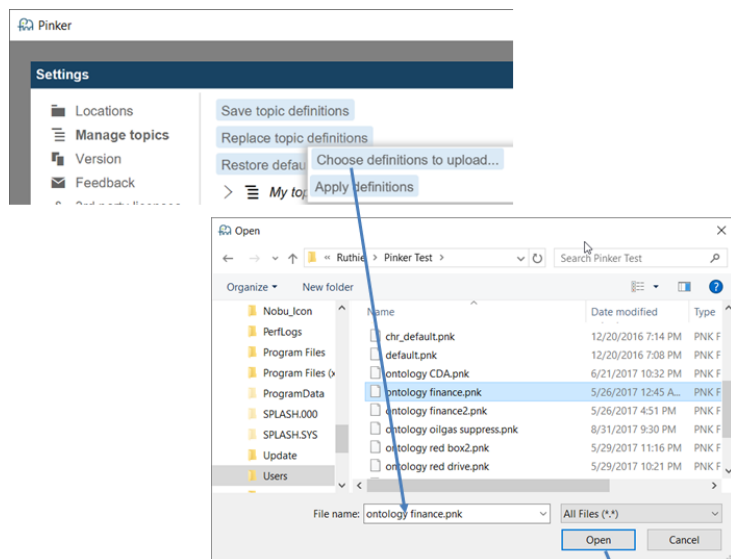
- Left-click the  icon
- Left-click the “Manage filters” option
- Left-click the “Save topic definitions” button
- Select a folder, assign a name and click “Save” (note the file will have the extension “.pnk”)



Replace topic definitions (this can only be done if you have save a previous definitions)

Using the Settings panel:

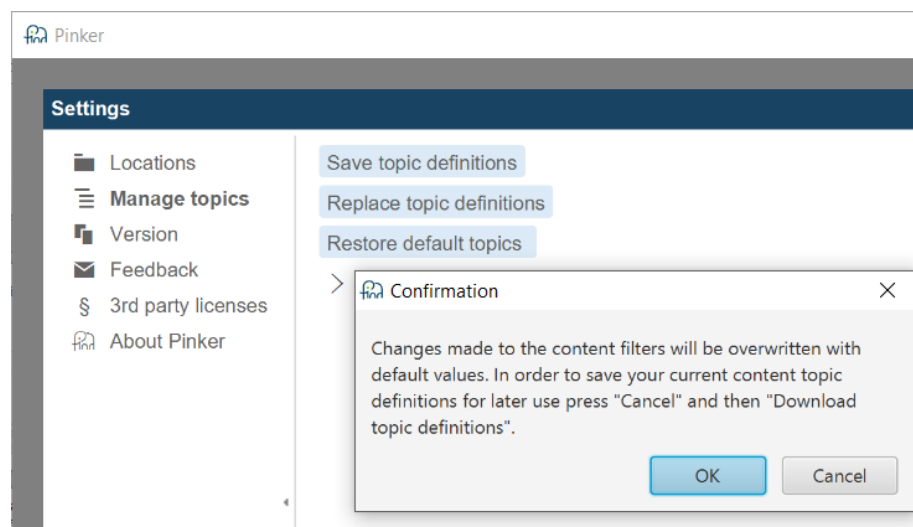
- Left-click the “Replace topic definitions” button
- Left-click the “Choose definitions to upload” button
- Select the file with the definitions
- Left-click the “Apply definitions” button



Restore default topics

This option allows the user to bring back the pre-defined topics that come with Pinker:

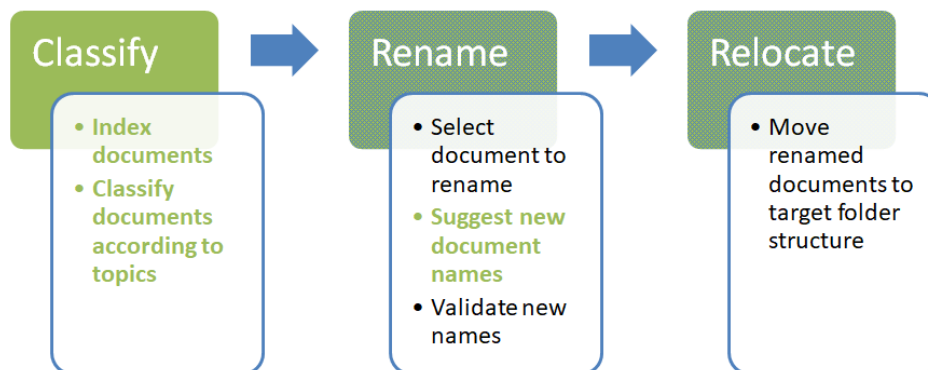
- Left-click the “Restore default topics” button
- Press “Ok”



Mail-Sorting plug-in

Topics can be used to address needs beyond search that require automatically organising or classifying large numbers of documents. One example is mail sorting. The Pinker Mail-Sorting plug-in can sort incoming mail in a matter of minutes rather than hours.

The picture below shows the specific steps using Pinker to carry out mail sorting for a financial services company.



The steps in green font are carried out automatically by Pinker.

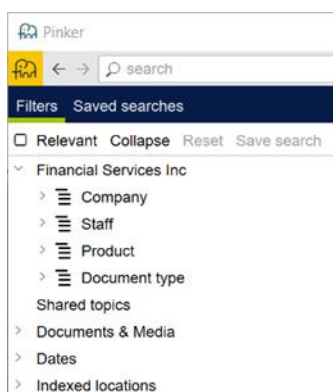
For this plug-in to work two things need to happen:

- All mail must have been scanned, made searchable through OCR, and stored in a specific folder
- Topics must have been defined following the company conventions to organise (mail) documents, e.g. by customer, supplier, document type, etc.

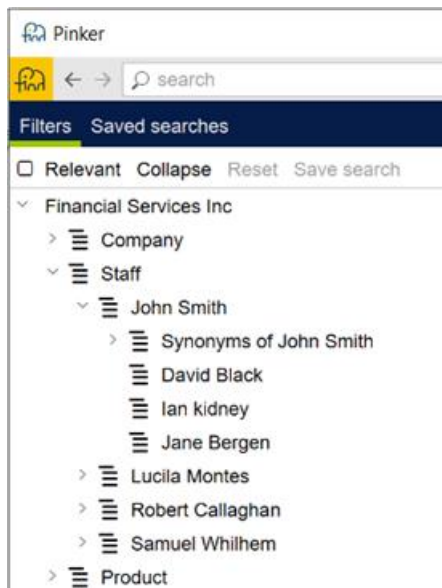
Classify all letter mail

For Pinker to be able to classify the mail according to a specific convention, the required filters must be defined using the topics functionality.

For this example the following topics were defined (see “Define topic filters”) to group the different elements that will help in finding and organising mails per staff.



As each staff has a number of customers under his/her responsibility, the customer name is defined as a sub-topic of “Staff”. In this example, John Smith has three customers.



For Pinker, each term defined as a topic represents a filter to find all matching documents. Now, Pinker is ready to rename the mail using the defined topics.

Rename mail per staff

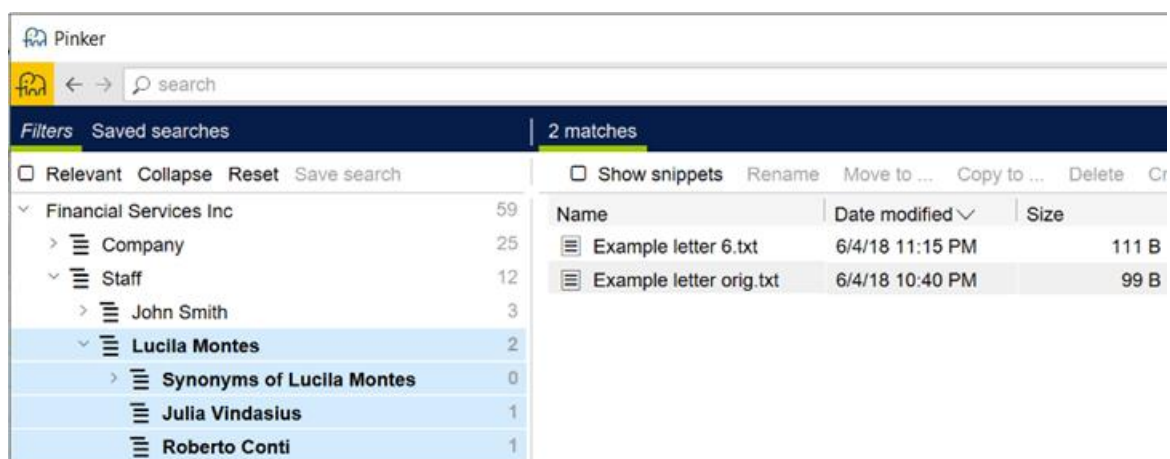
The following example illustrates how Pinker, using company’s convention, helps in renaming the mail per staff.

Example of using “Rename” to sort mail:

Goal: Find all mails that are responsibility of Lucila Montes and rename them

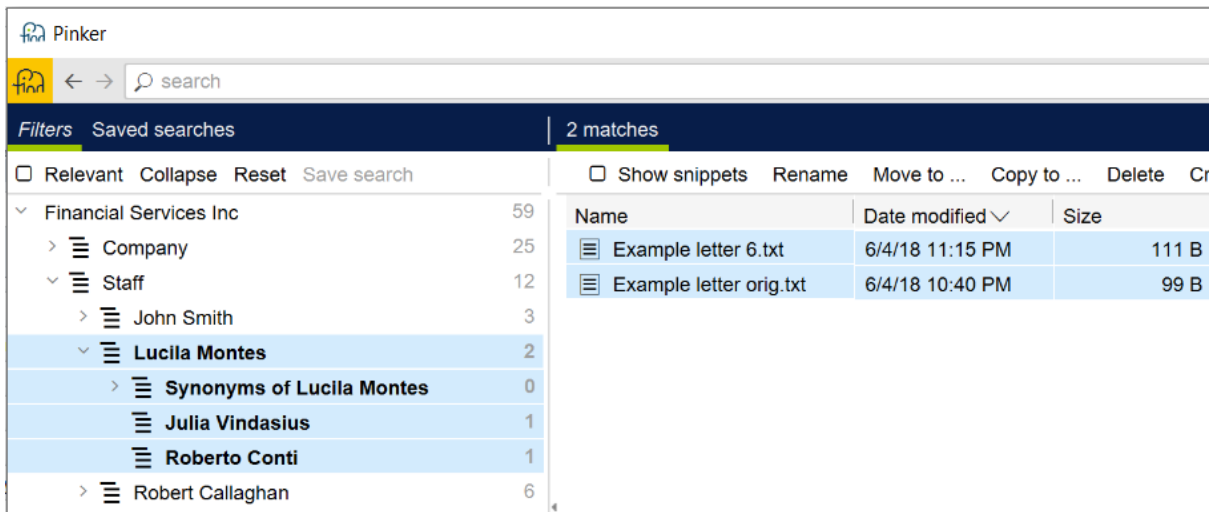
Steps:

- a) Left-click the chevron of “Lucila Montes” to expand and see her customers names, and
- b) Left-click “Lucila Montes” to view all matching documents.



The results area shows just two letters for Lucila Montes, one per customer as indicated by the match count next to the customer name.

c) Left-click and shift to select all documents shown on the right side of the screen.



With this action all the functions in the ribbon of the results area are activated.

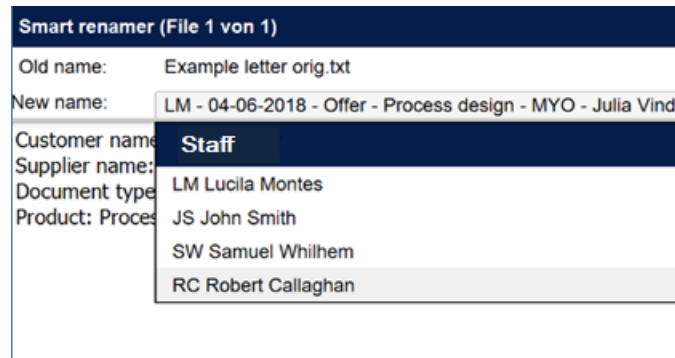
d) Left-click the “Rename” function.



Pinker suggests renaming this letter with the name shown in the “New name” field. In this case the naming convention includes seven terms: the staff initials, date, type of document, product name, company acronym, customer name and comments. Pinker also shows a preview of the letter to help the staff with the validation of the suggested letter name. From this screen, the staff (Montes) can either do one of the following:

- Click “Next” to accept the suggestion given and go to the next letter, or
- Click “x” next to the new name to leave the old name i.e suggestion no accepted, or
- Click “X” in the ribbon to close the screen and return to the results area with no changes , or
- Make changes to the suggested name and then click “Next” or “Finished” if no more mail to validate. These changes can either be done manually by typing the changes directly in the “New name” or by selecting the change from selection panels. These panels will show the content of the topic filters associated with the term to change in the “New name”.

For example, to change the staff name left click on “LM” and Pinker will allow you to select a different staff name from the selection panel shown below.



Similarly, if the date needs to be changed, left click on the date and you can select a new date from the following panel.



Relocate mail per staff

Once the validation of mail's new name has been completed, all the mail associated with a particular staff can be moved to the corresponding folder using the file operation “Move” (see file operations section).