The best way to organize, retrieve, share, back up, and synchronize files, folders, and emails in your desktop, laptop and local network



User's guide

BOOKMARKS • LABELS • COMMENTS • VERY FAST SEARCH MULTI-FOLDER LISTS • MULTI-PANE VIEW • FIND DUPLICATES FAST AUTOMATIC BACKUP • SYNCHRONIZATION • MESSAGING



Organyze Systems Private Limited



User's guide

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Contents

Pref	ace0	3		
1.	Introduction 0	4		
2.	Specifications0	6		
3.	Guidance on installing and uninstalling0	7		
4.	Finding files, folders, and emails instantly			
	 Attach tags in MS Office (Word, Excel, PowerPoint) 			
	Quick search by selecting multiple labels			
	Very fast retrieval by single label			
	 Very fast retrieval by multiple labels 			
	Fast retrieval by multiple labels and filters			
	Keyword search in multiple sub-folders, folders, and drives			
	Single flat list			
5.	Single list from multiple folders1			
6.	Manage files, folders, and emails1			
7.	Find duplicates1			
8.	File / folder details2	0		
9.	Multi-pane view			
10.	Creating and managing labels2	3		
11.	Attaching tags (bookmarks, labels, and comments)2	4		
	 Attach tags in MS Office (Word, Excel, PowerPoint) 			
	Attach tags in the Organyze window			
	Attach tags in Windows Explorer			
	Attach tags in Internet Explorer			
	 Attach tags to emails in MS Outlook 			
12.	Recently used files, recently tagged items3	2		
13.	Understanding tags3	4		
	(Bookmarks, labels, comments)			
14.	Automatic labeling3			
15.	Export / import labels4	1		
16.	Instant messaging, sharing4	4		
17.	Emailing files with tags4	5		
18.	Synchronize4	7		
19.	Back up5	0		
20.	Suggestions5	4		

Preface

We've got so used to a certain way to find files, folders and emails in our machines we don't even notice how much time we waste going from drive to drive and folder to sub-folder to sub-sub-folder trying to find what we need. That's because it usually takes just a minute or two. But add up the many minutes in a day and we end up wasting many days in a year. It could be worse. The wastage is greatest in situations like these:

- Looking for an old file we haven't recently used.
- Looking for something we'd downloaded a while ago.
- Looking for a photo or song saved a while ago.
- What's worse, we sometimes forget we'd created or downloaded
 a file some months or years ago, which could have been fully or
 partly recycled to reduce the time to create a new letter, proposal,
 presentation, design or calculations. That's sheer waste!

Not only does Organyze help find files and emails very fast, it takes the uncertainty out of the process. The application has been developed out of our own need to bring order into the chaos of our world of information. We have actually begun to save time. We are also using it for automatic backing up of our files and folders and for easy synchronizing of information from one machine to another.

We hope you find it useful too. Please visit our website, **www.organyze.com**, to read about how others are using Organyze, and to give us your feedback.

Kiron Kasbekar

Introduction

Organyze 2.1 helps you --

- Save time by finding files, folders and emails very, very fast. It
 doesn't matter where the files are saved; Organyze finds them in
 an instant. It is much, much faster than doing a keyword search or
 manually hunting through folders and sub-folders for files you need.
 YOU SAVE A HUGE AMOUNT OF TIME.
 - Organyze helps you do this through tags (bookmarks, labels and comments), which you can attach very easily (in the Organyze window, in Windows Explorer, in Word, Excel, PowerPoint and MS Outlook, and while downloading web pages in Internet Explorer).
 - You can simultaneously apply multiple tags to many files, folders or emails.
 - O Find files, folders, and emails easily, without trying to remember where you've saved them.
 - Find valuable old files and emails you've completely forgotten about, and reuse previously created content instead of creating it all over again. (To read how, see the chapter: 'Suggestions'.)

Make more efficient searches

- Quick, multiple label-based search from anywhere (desktop, Organyze, while working in other applications), to get a list of files, folders and emails instantly.
- Advanced search to narrow down the search, based on folder selection, keywords (in titles, content, comments or emails), file formats, size and dates, plus multiple labels.
- See tag details related to files as you take the cursor down a file list to guickly zero in on the files you need.

- Manage your files, folders and emails by getting a single, flat list
 of files from different drives, folders and sub-folders; see different
 folders in different panes in the same window to make comparison
 easy; find duplicates at the push of a button.
- **Import labels** from others and share your labels with others to make the labeling easy and uniform.
- Enhance sharing by sending and receiving messages with file attachments, along with bookmarks, labels and comments.
- Automatically back up your files daily in your machine or on the LAN, or online (by automatic FTP, or file transfer protocol) to keep them doubly safe without spending any time at all.
- Synchronize folders between two or more machines along with the tags (bookmarks, labels, and comments attached to the files and folders).

To see the power of the software, please spend a little time creating labels according to your preferences and needs, and then attaching them to all your important files. After that, see how FAST Organyze fetches your files on, say, double-clicking on a label or with the other search options.

There is much more to these features – you will find the info on the website – www.organyze.com. For example, tips on labeling and comments, and how to use the software for your specific needs.

Specifications

- You need the Windows operating system to be able to use Organyze 2.1. For Organyze to work fully, you need Windows XP, Vista or Windows 7. If you are still using Windows 2000, everything will work, except synchronization.
- Organyze is available for both 32-bit and 64-bit machines. For proper functioning, please use the Organyze variant that applies to your machine.
- For Organyze to work, you must have:
 - Microsoft .NET Framework, part of Vista and Windows 7. If you are using Windows XP or Windows 2000, Microsoft .NET Framework will download automatically if you do not already have it. Please accept Microsoft's conditions of use.
 - Microsoft SQL Server Express is usually not available. It will download automatically if you do not already have it. Please accept Microsoft's conditions of use.
 - Microsoft Sync Framework, part of Vista and Windows 7. If you are using Windows XP, Microsoft Sync Framework will download automatically if you do not already have it. Please accept Microsoft's conditions of use. If you are using Windows 2000, the Organyze Synchronization module will not work on your machine.
- The speed of Organyze will depend on how much RAM you have; over 2GB is recommended. A machine speed of around 2GHz is fine; more is better. It will also work with less machine speed and RAM, but will be slower. But, hey, that's what happens with any program you use!
- If you intend to do daily backing up of your files and folders, and also maintain many versions of these, please select disks and drives (partitions) with enough space for backup to happen unhindered for a reasonably long time.

Guidance on installing and uninstalling

First time installation

- During installation, remember to do these things:
 - O Select the 'I agree' button to accept the license agreement
- If you have an earlier version of Organyze, you will have to uninstall it before you install the latest one.
- Before you uninstall, please go to 'Back up' in the top menu, and click on 'Application data backup' and back up the application data (which includes data related to labels, comments, and bookmarks you have already created and attached, and your backup, sync, and other settings). If you do not do this, you may lose your recently created labels, comments, and bookmarks, and various settings, including your backup and synchronization presets.
- If you use more than one log-in for your machine (e.g., as a user and as an administrator), please use the log-in with administrator rights for the uninstall and install actions.
- Use the 'Add or Remove Programs' route to uninstall the previous version.
- After installation is complete, you may begin using Organyze from any login.
- However, before you can actually start the first time, you will
 have to validate your acquisition of Organyze. For this, you must
 be connected to the Internet. Enter the user name (email) and
 registration code. Validation will happen instantly if you have used
 the correct user name and registration code.

• After this, Organyze will ask you to identify the location to which it should automatically back up your application data. You cannot proceed until you do this – the purpose of this condition is to ensure that the work you do (creating and attaching labels, comments and bookmarks, and various settings, including your backup and synchronization presets) is not lost because you have forgotten to set up the application data backup. Please set a time at which your machine is normally on. Do not worry; the backup happens very fast.

Ideally, select a drive other than the C drive, because that's the drive that may have to be formated if you're reloading your operating system or for any other reason. In any case, save the application data backup files outside your Organyze program folder just in case you need to install a newer version of Organyze without using a patch.

The scheduled, automatic backup will keep adding fresh versions to the previous backups up to the number of versions you have asked Organyze to maintain. Once the set number of versions is created, with every new backup the oldest version will get deleted. Do not set too many versions unless you need them because that will use up disk space uselessly. A good idea is to maintain more (say, 5 to 10) versions for current folders, where you are actively modifying files and may wish to bring back something you have deleted recently. With archived folders (or folders that you do not use much) maintaining two versions should be enough.

If you use an external disk for backup, please remember to check that it is connected at the time when backup is scheduled to happen.

- The size of such backup files will not be more than 1MB to begin
 with, but will grow as you create and attach more bookmarks, labels,
 comments and synchronize and backup configurations. So set the
 number of versions to a level you think is optimal.
- Once you have done that, Organyze will close.
- Now you can start it again. You are ready to go!

Finding files, folders, and emails instantly

Organyze offers several methods to find the files or folders you need:

1. Quick search by selecting multiple labels: The Quick search option is the one you see when you launch Organyze. Just enter the names of the labels you want (Organyze will prompt you



as soon as you begin writing), select the 'OR' or 'AND' option if you have selected multiple labels, and click on the Search button. The list of all the files with the selected labels attached to them will show instantly, regardless of where (folder, drive, or disk) the files are saved. Please note: this is a search on the basis of labels, not a keyword search.

2. Very fast retrieval by single label: In the section 'Advanced search / manage' go to the pane on the left marked 'Labels', and double-click on a label. (To go to a label, just start typing the label you desire, and the cursor will quickly move to the desired area of the pane.) That's it. A list of all files with that label will appear almost instantly – irrespective of where (folder, drive, or disk) the files are actually located.

You can only do this one label at a time – but no other search can currently match the speed of this method.

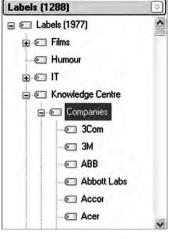
Note: To quickly find a label that is inside a parent label, first go the parent label and open it (click on the '+' sign) to show the labels

inside; then start typing the name of the label you want, and Organyze will take you there.

You can see all your labels in one place – so that you can double-click on any one to get all the files or folders with that label attached. You get the list instantly; it does not matter where the files or folders are located.

3. Very fast retrieval by multiple labels: Under the 'Search' bar you will see a link 'By label'. When you click this link, a list of labels with check boxes will open up. Select the labels you want, and then click on the 'Get list' button below the label list. The list of all the

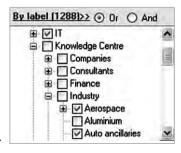
show instantly.



4. **Fast retrieval by multiple labels and filters:** Select the labels you want by checking the check boxes in the label list in the 'Search' pane (as in the previous method), make *one or more of the other choices* in this pane (including selecting one or more folder; entering a keyword to be found in a file title; content or an email; file size; date range and whether a bookmark has been attached) and then click the 'Get list' button below the label list. The list of all the files (or folders) with the selected labels attached to them, and which conform to the filters you have set, will show instantly.

files (or folders) with the selected labels attached to them will

These methods work only if you have attached labels to files, and seek a list of labeled files. (In the enterprise version, Organyze will fetch relevant files from all the machines to which your machine has access, provided these machines also have Organyze installed in them.



Also, in the enterprise version, one person can do the labeling centrally, and everybody else can use the system, besides using their own personal labeling.)

5. Keyword search in multiple sub-folders, folders and drives: This works pretty much like the

This works pretty much like the Windows keyword search, with these differences:

- You can select multiple folders and sub-folders in different folders and drives (and different machines, in the enterprise version).
- You can select the file formats you want, or get a list of folders only.
- You can also use multiple keywords with and / or options.
- Select bookmark and/or one or more lables as criteria.
- You can get emails in your results along with files and folders!
- Single flat list: This works
 pretty much like the Windows
 keyword search (with a BIG
 difference you can select
 multiple folders and sub-folders
 in different folders and drives);



easily select the file formats you want, or get a list of folders only.

When you seek file lists, the default will fetch you all the files in the selected folders. To reduce the size of the list, you can use various filters to narrow the search. These include:

- File format.
- O Keywords (through one or more option of searching for keywords in the filename, in the file content. through comments attached to files, and through emails in MS Outlook).
- Date (last week, last month, past year, or a date range).
- File size (less than 100KB. less than 1MB, more than 1MB, or a minimum size you can specify) by multiple labels.

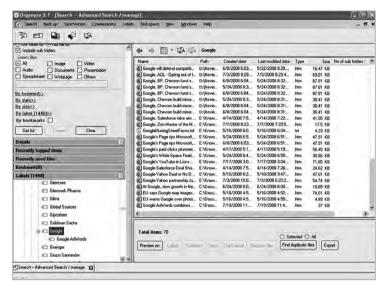
Select bookmark and/or one or more lables as criteria.

Read more on this in the next chapter - 'Single list from multiple folders'.



Single list from multiple folders

Organyze enables you to get a single list of files from multiple sub-folders, folders, drives, disks, and machines. **The uses:**



- This helps in housekeeping as well as in locating files quickly because you don't have to go through many lists, one folder or sub-folder at a time.
- It also helps you narrow down the search results because you are not forced to search through an entire drive or large folder; you can select only a few separate sub-folders for the search.
- You can use filters to narrow down the list (as discussed in the previous chapter).

In order to select multiple folders in one or more drives, click in the check boxes before the folders and sub-folders. Remember, the more folders you add to the selection, especially heavy ones, the more time it

will take to fetch the list. Also, the more folders you select, the longer the list will be. To get the best results, be selective.

Organyze supports all file formats:

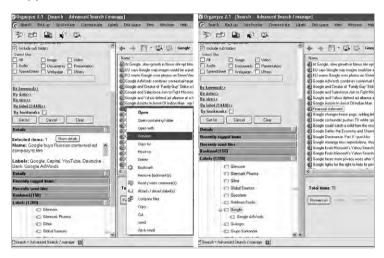
- Image: jpg, jpeg, bmp, png, gif, and psd.
- Video: aaf, 3gp, asf, wmv, avchd, avi, cam, dat, dsh, flv, m1v, m2v, fla, flr, sol, m4v, mkv, wrap, mng, mov, mpeg, mpg, mpe, mp4, mxf, roq, nsv, ogg, rm, svi, smi, swf, and wmv.
- Audio: mp2, mp3, mpeg, gsm, wma, m4a, mp4, m4p, aac, mpc, vqf, ra, rm, ots, swa, vox, voc, dwd, and smp.
- Document: abw, acl, afp, ans, aww, cwk, doc, dot, egt, ftm, hwp, lwp, mcw, nb, nbp, txt, odt, and pdf.
- Presentation: key, nb, odp, otp, pps, ppt, prz, shf, sspss, sxi, keynote, nbp, pptx, and watch.
- Spreadsheet: 123, aws, clf, csv, numbers, gnumeric, ods, ots, qpw, slk, stc, sxc, tab, vc, wk1, wk3, wk4, wks, wq1, xlk, xls, xlr, xlt, xlsb, xlsm, xlsx, xltm, and xlw.
- Webpage: htm, xht, xml, mht, asp, adp, bml, cfm, cgi, ihtml, jsp, las, lasso, pl, php, html, xhtml, mhtml, aspx, lassoapp, shtml, and phtml.
- **For all other formats:** If you wish to select any other format, please enter the file extension in the 'Others' text box (e.g., cad); enter more than one such file extension with a comma to separate them.

Manage files, folders, and emails

Opening files

You can open a file in its original program by double-clicking on the filename in the lists displayed in the Organyze window.

Copy, move, delete files



You can copy and paste, rename, move and delete files and folders in the Organyze window. Remember: whatever you do in the Organyze window or in the Explorer panes inside the Organyze window will reflect in your computer. So, if you delete a file in the Organyze window, it will get deleted from your machine. Similarly, your rename, copy and paste, and move actions will reflect in your machine.

Note:

When you rename or move a file or folder in the Organyze window (including in the Explorer panes within the Organyze window), the tags you have previously attached to the file or folder will remain intact and connected. If you rename or move a file or folder in Windows Explorer, the tags will get detached. But don't worry, next time you double-click on the concerned

labels you will be informed about the error, and helped to re-connect the labels quickly and automatically.

Manage emails

With Organyze, you can retrieve emails from MS Outlook the same way as you search for files and folders – through the use of bookmarks, labels, and comments, besides using keywords and various other ways of widening or narrowing down the search.

Email search through Organyze

- Search through a selection of email folders (e.g., inbox, sent, or one or more of folders you have created) by simply checking check boxes with these folder names.
- Attach bookmarks, labels, and comments to your emails while you are working on them in MS Outlook.
- Attach one or many bookmarks, labels, and comments to a multiple selection of emails in your MS Outlook inbox or sent or other email folders.

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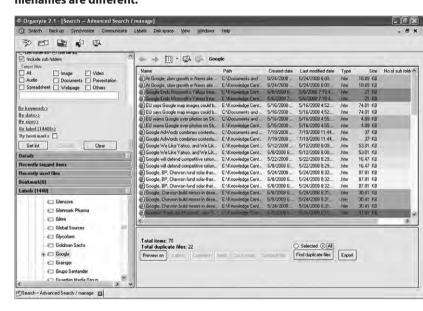
South Communicate Communica

Organyze tool bar in MS Outlook



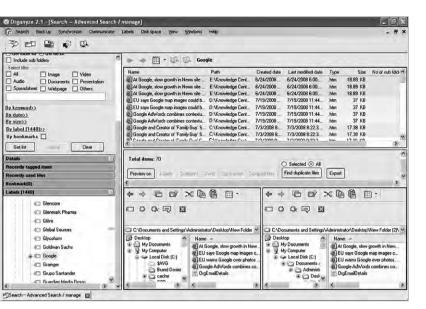
Find duplicates

Once you have got a list of files in the Organyze window, you can ask the Software to find duplicates for you either from a selection of files or through the entire list. The duplicate files will show in similar colors. Organyze will show two duplicate files as duplicate even if their filenames are different.

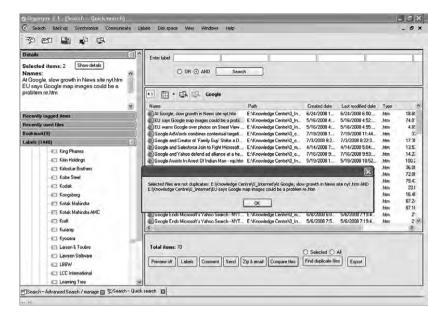


You can delete duplicates you don't want. **Do, however, take care of these things:**

• When you have a series of related files with duplicates located in other folders, you may wish to ensure that all the copies you retain reside in one folder. To avoid deleting some duplicate related files from one folder and some others from other folders (which would leave them scattered all over the place), you can open multiple panes within the Organyze window, which will show you the Windows Explorer views of the folders and files.



- Use the single list of Organyze (with duplicates showing) to see the duplicates, and then delete unwanted duplicates from the lists showing in the Windows Explorer panes. This is only an option.
 If you are working with a relatively short list, you may be able to weed out duplicates without opening the additional panes.
- **Note 1:** The compare, find duplicates, and export functions are available only in the Organyze pane.
- Note 2: You do not need to maintain any orderly system to find files; Organyze gets you files wherever they are located (provided you have added various tags to the files). But orderliness is useful when you are backing up and synchronizing – so you can back up (and restore) or synchronize blocks of related files.
- **Note 3:** Many of the duplicates may turn out to be images, scripts and other components of html pages, which are normally stored in folders with the same names as the html files they represent. If you delete these components, the html files may not open properly.



Comparing files

Select any two files and click on the 'Compare files' button. The program will tell you if the files are duplicates or not.

File / folder details

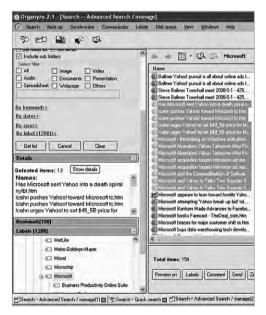
When you take your cursor to a file in a list displayed in the Organyze pane of the 'Manage files / folders' module, you will see tag details related to the file in the left panel, in the pane under the heading 'Details'. The details seen include the number of items selected, the filename or names, whether the file is bookmarked, and the labels and comments you have attached to the file.

When you select many files in the displayed list, the Details pane will only show you the number of items selected, and the names of the selected files. You can see the other details by clicking on the 'Show details' button inside the pane and the details of all the files will be displayed in a tabular format in another window – including filename, comments, labels, bookmarks, path, created date, last modified date, type, size, number of sub-folders (if you have selected folders), and number of files.

Such a detailed listing can be useful for your housekeeping. You can see if, in a list of related files, some file is missing, which you then need to move from somewhere else, or acquire from a colleague or friend, or download from the Web.

Export list, details

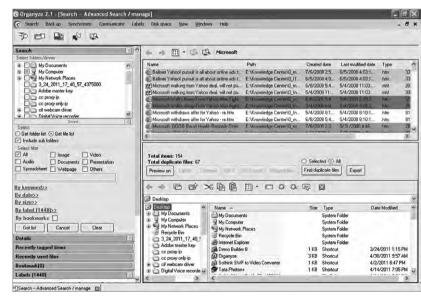
You can export the tabular list to Excel for printing. This can aid you in your housekeeping.



Multi-pane view

The 'Manage files / folders' function of Organyze allows you to open **multiple panes** in the same window. These include:

- The main Organyze pane.
- Clicking on the Explorer icon immediately above the Organyze pane opens a Windows Explorer pane.
- When you do that, another Explorer icon appears, clicking which will open one more Windows Explorer pane.



Click on the red cross box to close the pane.

Other features

 You can also get the Explorer view in another window by clicking on the Explorer icon in the top toolbar.

- You can choose to work either in the Organyze pane or in the Explorer panes. You can do both if you like.
- You can open files by double-clicking on the filename in the lists displayed in the Organyze window – in the Organyze pane and in the Explorer panes.



Note 1: The compare, find duplicates, and export functions are available only in the Organyze pane.

Note 2: You can see details only for selections in the Organyze pane.

Previews

You can see previews of images as you take the cursor down a list in the Organyze pane. This helps to identify the file you need; it also shows up the duplicates when you do a search for duplicates. If you do not need the previews, just click on 'Preview off'.

Creating and managing labels

There are three ways in which you can create new labels. One is by the Labels > Manage labels route; when you click on 'Manage labels', you will see a pop-up showing your existing labels in a hierarchical structure. The second way is to do it 'on the fly', that is, while you are trying to attach a label to a file. And the third way is when you are in the 'Import labels' window (see chapter 'Export / Import labels').

When you are in the process of tagging a file, and find that there is one more label you should attach to it but that label doesn't exist, just go ahead and create it while you are still in the labeling mode. The method in all these ways is the same:

- Select any label under which you wish to create a new label, and click on 'Add new'. You will get a text box ('New node'), Which lets you enter the name of the new label you wish to create. Enter the new label name, and click outside – the label gets created.
- If you have made a mistake, say, a spelling mistake, right-click on that label and click on 'Edit', and you can correct the spelling.
- When you create a new label, it will appear at the bottom of the list within
 the level to which it belongs, instead of in alphabetical order. When you
 re-open the label list, the new label will be in its alphabetical order.
- You can also modify a label (e.g., change its spelling, or shift a
 label from one parent label to another, as in shifting 'technology'
 from inside a parent label 'industry' to inside another parent label
 'manufacturing'). The changes will automatically apply to all the files
 that have been tagged with that label.
- You can also use the same label name (e.g., technology) many times to get more precise results (in this case, by placing a 'technology' label under the 'chemicals', 'automotive', 'aerospace', and 'pharmaceuticals' parent labels).

Attaching tags (bookmarks, labels, and comments)

There are many ways in which you can use and create tags with Organyze (bookmarks, labels, and comments). They are:

 Attach tags directly while working in an MS Office program (Word, Excel, PowerPoint, and MS Outlook) by selecting the bookmark / label / comment links that show in the top toolbar (if it does not show, go to View > Toolbars and select the 'Organyze' toolbar).

If you have not saved a (new) document before, Organyze will take you through the Save routine and then ask you to attach the bookmark, label, or comment. If the file has already been saved, go directly to the label, bookmark, and comments icons and attach the tags.

You can turn the Organyze toolbar icons off doing this:

In MS Office 2000 or 2003: click View > Toolbars and select (or unselect) Organyze. But, while turning it off, do not remove it from the toolbars customize menu; if you do that, you will not be able to restore this function again.

Advantages while working in a file:

- A view of the content gives you a better idea about which labels to attach or what comment to write.
- You can copy and paste parts of the file content in a comment and add your remarks.
- Ideal for first-time tagging of a file since it requires hardly any effort at all.

Note: This method works well when you wish to attach tags to one file at a time while seeing the contents of the file.

Organyze toolbar in MS Outlook 2010



Organyze toolbar in MS Office 2010



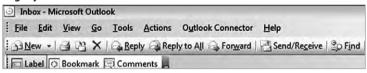
Organyze toolbar in MS Outlook 2007



Organyze toolbar in MS Office 2007



Organyze toolbar in MS Outlook 2003

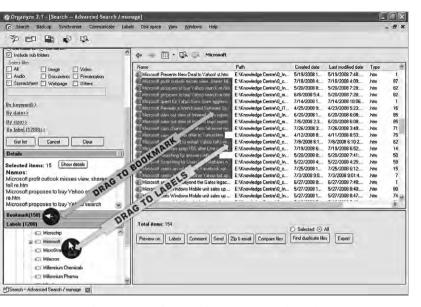


Organyze toolbar in MS Office 2003



2. **Attach tags in** the Organyze window.

- You can attach bookmarks, labels or comments to many files at the same time.
- O You can drag and drop one or more files on to the bookmark box or to any label in the labels pane on the left to attach these tags. To do this with labels, open up the label structure so that you can see the label you wish to use; then drag and drop the filename on the label.



- Attach tags in Windows Explorer. You can right-click on one or more filename and attach a tag to the file.
 - You can attach bookmarks, labels or comments to many files at the same time.
- **Note 1:** You can attach a label to up to 20-30 files simultaneously in Windows Explorer, depending on their size (there is no such limit when you work in the Organyze window).
- Note 2: If you move files or folders from one place to another through the original Windows Explorer, the files will lose their previously given tags. But don't worry; Organyze helps you quickly restore the tags.

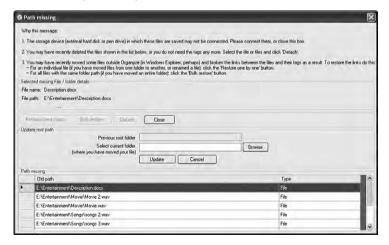
When you get a list of files in Organyze using tags, and if there are broken links between one or more of those tags and some files or folders which you have moved from outside Organyze (e.g., in Windows Explorer or an explorer dialog box in any application), Organyze will open a pop-up (see Page 24) with a list of all the files and folders with the old path.



Bulk restore

Let's say you have shifted a folder called Images and Videos with six subfolders and 2,000 files in it from your D drive to your E drive in Windows Explorer. By doing this, you have broken the links of these folders and the files to their tags (bookmarks, labels and comments).

In the 'Path missing' pop-up, select any one file in the 'Old path' list, and click on the 'Bulk restore'. You will then be asked to browse and select the new location (see below).



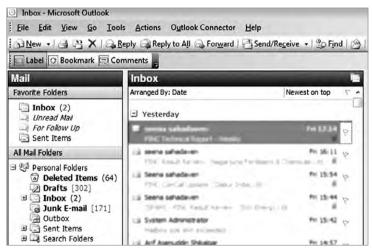
Make sure the last folder name is the same (which will usually be so unless you have changed the folder name besides moving it). Click the 'Update' button.

Your tags will get restored instantly for all files at the same folder level as the selected file and for all sub-folder levels below it. In the example given above, the missing tag links will be restored for all the files in one shot.

If you have moved some other folders to other destinations, then you will have to repeat this process.

Restore one by one

If the list of files with missing tag links is mixed because you have moved too many individual files from different locations to different destinations, click the 'Restore one by one' button to restore links to one file or folder at a time.



- 4. Attach tags directly while working in Internet Explorer. You can use Organyze to attach a bookmark, labels and comments to a Web page while you are saving a Web page in Internet Explorer or when you open a page you have already downloaded and saved in your machine. You can do this in one of these ways:
 - O For an unsaved page, click on the 'Save' (floppy) icon in the

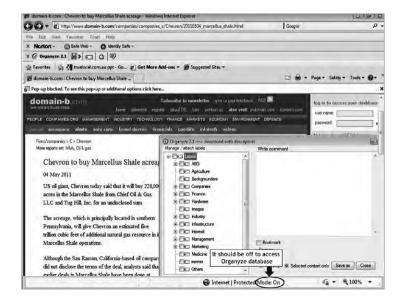
Organyze toolbar at the top of the page, and on the 'Label', 'Bookmark' or 'Comment' buttons for an already saved file.

 You can also go to the top File link, and select
 Organyze > Label,
 Bookmark, or Comment to attach the tag you want.



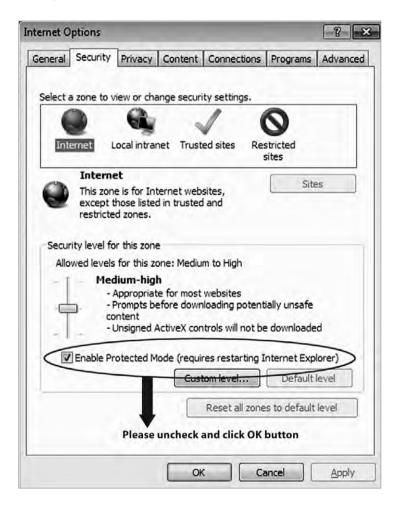
O You can do the same thing by right-clicking on the page and then attaching the tags you want.

Note: The right-click option is useful especially when you wish to save the content of pop-up windows some websites open when you ask for a print-friendly page, which do not have the top links (File, Edit, View, etc.) you can use to save the pages instead of printing them.



If you are using Windows 7, please make sure that the Protection Mode in Internet Explorer has to be set at 'Off' for you to be able to use this feature of Organyze 2.1.

To set Internet | Protected Mode off, go to Tools > Internet Options > Security (or double-click the 'Protected Mode' link)



5. Attach labels, bookmarks, and comments to emails in MS Outlook

- O In your MS Outlook window select one or more emails to which you wish to attach bookmarks, labels, or comments. Click on the Label icon on the Organyze toolbar at the top.
- O The emails will get bookmarked when you click on the Bookmark icon. For labelling, a pop-up will open, in which you can select the labels that you wish to attach.
- Choose labels that you would like to attach and click on 'Attach' to complete the process.
- When you click on Comment, you will get a pop-up in which you can enter a comment and save.
- You can also attach labels, bookmarks or comments after opening a mail in MS Outlook by selecting from the Organyze toolbar at the top.

Note: If you do not see the Organyze toolbar, go to View > Toolbars and select Organyze; the Organyze toolbar will now appear at the top. If Organyze is already selected in the toolbar menu but you still cannot see the toolbar (this may happen if you have a crowded set of toolbars), then click on the icon at the right of the whole toolbars panel of the page, and drag it to the main toolbar area. If you are unable to do this, then go to View > Toolbars, and see if 'Lock the Toolbars' has been selected. Unselect this to unlock the toolbars, and then drag the Organyze toolbar to the main toolbars area. You can lock the toolbars now, if you like.

Recently used files, recently tagged items

Organyze 2.1 offers you yet another way to find files very fast!

Recently used files

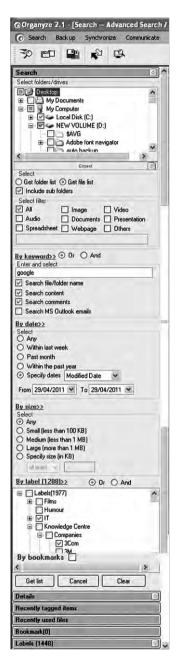
We often forget which files we have worked on recently and where they are. Organyze helps you quickly get a list of files which you have recently opened, created, or modified. They will show in a single list regardless of where they are actually located.

You will see the button 'Recently used files' in the left panel. Just click it, and you will instantly get a list of all the files you have used recently (including files you have merely opened and closed without working in them).

Recently tagged items

Organyze also helps you find files, folders, and emails you have tagged recently. They will show in a single list regardless of where they are actually located.

You will see the button 'Recently tagged items' in the left panel. Just click it, and you will instantly get a list of all



the files, folders, and emails you have tagged recently.

Items will show even if you have not opened a file but merely attached a tag from anywhere outside the file (e.g., in the Organyze window, in Windows Explorer, or a MS Outlook list)

Note:

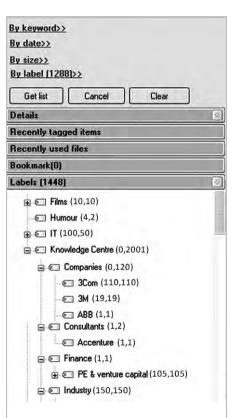
Please do not confuse these lists with the 'Recent documents' feature in Windows, which displays shortcuts to your latest files. If you delete a shortcut, the file remains. The lists you get in Organyze are not shortcuts. So please do not delete them unless you actually wish to delete the file itself.

Understanding tags

Organyze lets you tag files, folders, and emails with three types of tags – bookmarks, labels, and comments.

Bookmarks

Bookmarks are simple tags that can only signify that the tagged file is relevant or useful, or of a certain priority. Bookmarks are very useful because you can attach a bookmark very fast, and bookmarked items can be found instantly. You can improve your search by combining



bookmarks with other filters (folders and sub-folders, file formats, keywords, email folders, comments, date, size, and labels).

To bookmark one or many selected files in the Organyze window, just drag them to the box titled 'Bookmark' in the left panel – and they will be bookmarked. Or right-click on the selection and then choose 'Bookmark' in the menu you get. You can also attach bookmarks when you are in an MS Office file, in Windows Explorer, or in Internet Explorer.

To find bookmarked items, simply click on the box titled

'Bookmark' in the left panel, and you will instantly get a list of all bookmarked files, folders and emails.

You can **remove bookmarks whenever you wish to do so.** Click on the box titled 'Bookmark' in the left panel, get a list of all bookmarked items, and detach bookmarks from those you wish to un-bookmark. You can also remove bookmarks when you are in an MS Office file, in Windows Explorer, or in Internet Explorer.

Labels

Labels too are tags, but they can provide many meanings by having different names (see 'types of labels' below). So you can distinguish one set of labeled files from another because of their different labels.

Types of labels

You can get much more out of labels if you think of different types of labels. We suggest at least two broad types:

- Labels that describe the content of a file (i.e., the subject). So you
 can have labels like finance, marketing, advertising, 'Ford Motor', or
 'innovation', or even 'material for conference'.
- Labels that describe a file's process or score (e.g., status, priority, score, etc.).
 - Status descriptions could include terms like 'sent for approval', 'approved', 'final', 'emailed', or even 'label later'.
 - Priority descriptions could include terms like 'urgent', important', 'archived'
 - Score descriptions (usable in assessing tests or job applications, for example) could include terms like 'excellent', 'good', or 'bad'.

Creating / editing labels

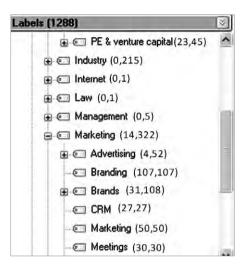
Organyze allows you to create a **hierarchical structure** of labels to allow you to classify and better organize them. Keep the labels short to avoid scrolling.

Label arrangement

You can find labels in various ways:

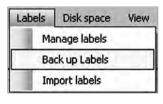
 The normal view of labels is the hierarchical ('tree view') structure; but you can change it to a simple alphabetical list whenever you want.
 When you are in the Organyze window in the 'manage files / folders' window, you can see the labels on the left. They are displayed in a hierarchical format by default (if you have chosen to create a hierarchical or 'tree' structure for the labels, which we strongly recommend).

The advantage of being able to attach labels arranged in a hierarchical structure is that you can use the same label name to mean different things. For example, vou can have a label 'technology' under a parent label 'chemicals'. and another label 'technology' under a parent label 'aerospace'. When



you double-click the label aerospace > technology, you will only get the files related to aerospace technology and not chemicals technology. This improves the relevance of your search results.

To go to the simple alphabetical listing, in the Organyze window right-click on any of the labels in the left pane, and select 'List view'. In this view, it's easier to find files by selecting the alphabet with which your label begins. If you have used the same-named label at different levels in the label hierarchy (e.g., 'technology' at the basic level and also under 'aerospace' and other industry labels) you will see the label twice (or more) in the



In all other display formats (in the Explorer pane in the Organyze window, in Windows Explorer, in MS Office, or in Internet Explorer) you can see the labels only in the tree view arrangement.

alphabetical list.

Note: What are those numbers in brackets next to the labels?

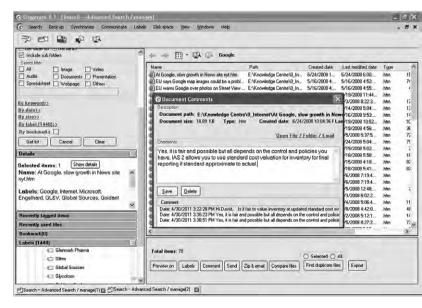
The number in brackets next to the title 'Labels' in the title band is the total number of your labels. If you right-click on any label inside the pane and select 'Show attached count', you will see a number next to that label indicating the number of files with the 'parent' label attached, and a second number indicating the total number of files with both 'parent' and 'child' labels. The total number of label attachments in your entire system is shown in brackets after 'Labels' at the top inside the pane.

Comments

Organyze allows you to attach comments to files, which you can see without opening the files. So, when you run down a list of files in the Organyze window (by moving the cursor down the list), you will see the comments (along with other details, such as labels) in the panel on the left under the heading 'Details'.

Advantage:

 You may have many versions of a report you are drafting. Some drafts may have come back from colleagues with their comments. If you are looking for one of these, you can identify it by looking at the



comment in the Details pane instead of opening the file. That can save you a lot of time (provided, of course, you or your colleagues have attached comments to the files). You should also find this method useful in other ways — for example, finding photographs taken on a holiday by looking for keywords in comments describing details of the photographs!

- You can see all previous comments attached to a file or folder.
- What's more, you can do a keyword search through comments. That helps because you may be looking for remarks made by a colleague, saying, for example, "These figures seem outdated. Could you add the latest numbers?" That may be the draft in which the colleague has also marked some paragraphs for revision. So if you remember the comment, you use the keyword 'outdated' or 'figures', and you will find the file; it doesn't matter where you have saved it, or when.
- Note 1: You can attach a comment to a file of any format including images and videos. That's a big help because while you can add remarks inside a Word or Excel file, you cannot easily write remarks inside an image, flash, audio or video; and even where you can do that you cannot see them until you open the file. So, Organyze helps to improve the ease of finding files by letting you see comments without opening the files.
- **Note 2:** You can have **multiple comments** attached to a file.
- Note 3: For your colleagues or friends to attach comments to a file they are sending you, they too must have Organyze installed on their machines. If they don't, you will have to jot down their remarks as comments and attach them to the received files.

Automatic labeling

You can ask Organyze to label files automatically. Open Windows Explorer, right-click on a folder, and in the Organyze menu select 'Automatic labels'.

- With the help of the check boxes, you can select all or only some sub-folders in a folder for automatic labeling (default is all).
- Organyze will ask you whether you wish to automatically label all the files inside the folder or only select formats.
- Click on the 'Start' button (and confirm okay), and Organyze will immediately label all files in the folder (including its selected subfolders) with the names of all the parent folders upstream of the files.

How it works: If you are trying to automatically label files in a main folder called 'Marketing', in which you have sub-folders called 'Advertising' and 'Promotion', and the Advertising sub-folder has a sub-sub-folder called 'Ad agencies', then all the files in the sub-sub-folder called Ad agencies will automatically get these labels attached to them – Marketing, Advertising, and Ad agencies (but not 'Promotion').

This automatic feature can be very useful for labeling older files.

But please remember this – you may end up with odd-sounding labels. And you may end up with too many same-name labels in parallel. On the other hand, if you use this automatic feature carefully, it could save you a huge amount of time.

Note: To avoid clutter caused by too many same-name labels, try this: Let's say you have a label 'Innovation' under a parent label 'Management', and your automatic labeling shows up another label 'Innovation' because that is the name of a folder or subfolder somewhere in the path of your automatic labeling.

To clean up, after the auto-labeling is done, call all the files with

the auto-labeled 'Innovation' label (it will be a separate label, not under 'Management'). Then select all the files (except those you think do not really fit the description 'Innovation' though you may have dumped them in the innovation sub-folder for convenience while downloading), and do this –

Detach the new 'Innovation' label; attach the 'Innovation label' under the 'Management' parent label; then delete the autocreated 'Innovation' label. That will delete the label and also remove the 'Innovation' label from the files you decided should not be tagged with the 'Innovation' label.

Export / import labels

We know it can be a pain thinking up label names. So we will soon create a label bank (see below) on the Organyze website from which you can import and select the ones you would like to use. In the meanwhile, the Organyze package that you install will come ready with a basic list of labels, so you do not have to begin from scratch!

If you do not want any of the labels we have provided, just go to 'Manage labels' and remove or modify them. And, of course, add your own!

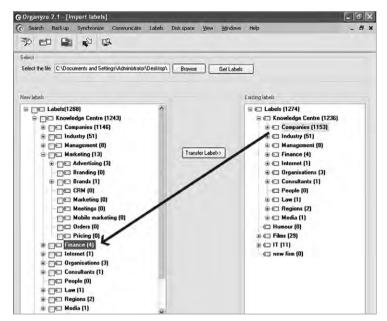
You can also import labels from colleagues or friends who have already created a good label structure for their use. Once you have a good collection of labels, you too can export them to other colleagues or friends.

Exporting labels: To export your labels, use the link Labels > Back up labels. When you select the place to back up the labels, and click on the 'Take backup now' button, Organyze will create an XML file and store it in your selected location. You can then send it to a colleague or friend for them to extract the labels they need. (Remember where you have saved the XML file.)

Importing labels: If you have received an XML file containing a colleague or friend's labels, use the path Labels > Import labels to browse, get the appropriate XML file (you may have received labels from more than one colleague or friend), and click on 'Get labels'.

The imported labels will show in the left panel (see snapshot). You can add labels from there to your own set of labels (in the right panel) in two ways:

- Go one by one, transferring a label from the left side to the right.
- Select an entire group of labels (e.g., Music, under which there
 may be specific labels for different styles of music or names of
 musicians; or Companies, under which there would be names of
 different companies; or Marketing, under which there would be
 different aspects of marketing) and transfer them to the right side.



Organyze will check which labels you already have, and add those you do not have.

- Note 1: Remember to select the group (or single label) on the left and the parent (one level higher) on the right before you click on the 'Transfer label' button. So, if you already have a label group called 'Music' and the imported label set also has 'Music' but with more specific labels than you have, select 'Music' in the left panel and the next higher level in the right panel (which could be 'entertainment', or 'Labels' (the root). If you select 'Music' on both sides, then a new label set called 'Music' will be created within your already existing 'Music' label set, which is not desirable.
- Note 2: Your label structure can be different from the one in an imported set. The 'Music' label set on the left may have only the names of musicians under it. But you could create (or you may already have) categories like 'Classical' and 'Popular' under music, and pick musicians from the left and place them under these categories (classical musicians under 'Classical' and pop musicians under 'Popular'.

Note 3: You can rename the labels to suit your preferences. So, you could change 'Classical' to 'Western classical', place it under 'Western', and maybe add 'Jazz' and 'Rock' as additional categories. You could have a label called 'Channels' under marketing, or you could rename it as 'Dealers'. Use labels that you are most comfortable with, applying descriptions that you (or people in your organization) use most. That way, you will recall and find them very easily when you are looking for files.

Label bank

The label bank will provide you with a choice of thousands of labels organized by subject. Go to www.organyze.com and download the label groups you need. You will get them as an XML file, which you can save in a convenient location. Extract them the same way as you would extract labels imported from a friends or colleague (described above); use them as they are, or modify them.

Instant messaging, sharing

Organyze brings you instant messaging within the local network in your office or at home (if you have more than one connected machine). Write a message, select one or more contacts in the network, and send. Receive messages (including replies to your messages) from others.

With file attachments

You can attach a file to a message. Choose to send (or not to send) bookmarks, labels and comments along with the attached file. Receivers have the option to reject the file and/or the tags (bookmarks, labels and comments) that come with it, or accept them, and to save the file in an appropriate folder so that they can see the tags on their own machines.

Format message text

You can format the instant message text with formatting like bold, italics, underline, and font colors. This feature can help you highlight and emphasize some parts of the text so they are not missed.

Search / advanced search through messages

Find previous messages and conversations by asking for a simple listing, with qualifications like date range of the messages, all / only received / only sent messages, only messages sent by or sent to selected contacts or all contacts. You can also do a keyword search through the messages to find the right message, along with or without the above qualifications.

Share comments

With instant messaging, you can see comments attached to a file sent by someone else. Others can see comments you have attached with files you have sent. Of course, both sender and receiver must have Organyze installed on their machines.

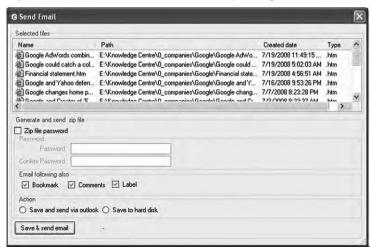
Emailing files with tags

You can send files along with their tags (bookmarks, labels, comments) to other users directly from the Organyze window. Simply select the files you wish to send and click on the 'Zip & email' button. A pop-up will open (see snapshot); you may protect your files with a password if you wish. You can also decide which tags (some or all) you would like to send along with the files.

If you are using MS Outlook (NOT Outlook Express), you can choose to 'Save and send via Outlook' option and click on 'Save and send email.' You will be asked to choose the location to save the zip file, which will automatically get attached to the new email; you can write your email message and send the mail.

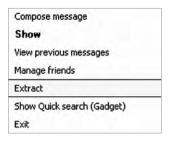
Alternatively (if you are not using Outlook), you can choose the 'Save to hard disk' option, and then attach the saved zip file to your email in any other email system.

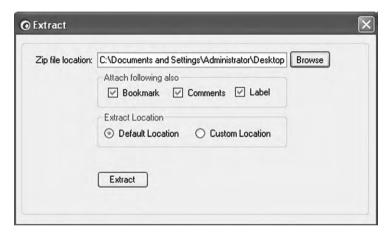
When you, as a receiver, receive such a mail you must save the zip file in your hard disk. To see the contents of the zip file, right-click on the



Organyze icon in the 'system tray' (at the bottom right of your screen), and click on 'Extract'.

You will be asked to select the zip file; once you do that, click on 'Extract' (see snapshot), and the file(s) will be extracted, and the tags will get merged with your own set of tags.





Synchronize

Organyze helps you synchronize folders in different machines (desktops, laptops), through the medium of storage devices like pen drives or a folder in a hard disk which will act as an intermediate storage device.

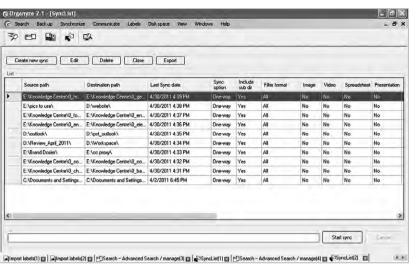
By default, the synchronize module in Organyze **does not delete files** in the destination folder if they do not exist in the source folder. So you need not worry about loss of data as a result of synchronization.

You can choose to synchronize selectively:

- One-way (which is like a backup with the option of including some or all the tags) or two-way (default: one-way).
- Include or exclude sub-folder (default: include).
- Include or exclude various file formats (default: all).
- Specify the date range for modified, created or accessed dates. The
 purpose of this feature: When you synchronize two machines with
 large storage spaces via a device like a pen drive with much less
 space, you may need to delete older contents of folders from the
 pen drive to create space. By setting dates, you ensure that older files
 are not copied to the pen drive all over again.
- Include bookmarks, labels and comments.

You can save your synchronization settings (i.e., source and destination folders plus the other conditions mentioned above). Once you have saved these settings, whenever you need to sync a folder, just select the desired setting from a stored list and click on the button 'Start sync'. You can also delete any of these settings, or edit them (such as when you wish to change the destination folder, or the inclusion or exclusion of any item or date range).

Note 1: Why does Organyze not delete files while synchronizing? Let's say you need to copy to your laptop, say, only 10 files



relevant to a client you are going to meet on your sales call, out of a total of 100 files in the source folder in your desktop; you do not copy the rest because it's not needed. On your trip you edit three files and create two more files. On your return when you synchronize from the laptop to the desktop, the default setting in Organyze will merely copy the three edited files (which will overwrite the older ones) and the two new files to the desktop folder; it will not delete anything from the destination folder because it doesn't exist (or has been deleted) in the source folder. So you end up with 102 files in your destination folder in the desktop. If you allowed delete, you would have only 12 files because the remaining 90 would get deleted.

- **Note 2:** Why not use backup instead of synchronization in this situation? The reason is that the synchronization function also backs up the tags to your files and folders. So, if you have added labels or comments to some of the 10 files you have carried with you on your trip, or to the two new files you have created, these labels will get transferred to the desktop folder (which doesn't happen when you do a backup).
- **Note 3:** This doesn't mean your labels cannot be backed up. In fact, your Organyze set-up will not allow you to begin using

the program until you have decided on a place to back up the 'application data', which means, primarily, your tags (bookmarks, labels, and comments) and related information and settings. You have to do this as part of your set-up only once, before you begin using Organyze; you will get a message the first time; the message will not recur after that.

- **Note 4:** You may attach bookmarks, labels and comments to files in a source folder without changing the files themselves in any way. In this case Organyze will sync the bookmarks, labels and comments with the destination folder without wasting time; overwriting files that have not been changed.
- **Note 5:** To sync from one machine to another in a network, first sync from the first machine to a folder in either machine or in a third machine, then sync from that folder to the destination machine. You can also use a pen drive as an intermediate medium instead of the in-between folder when you need to, for example, sync folders between your office machine and home machine.
- **Note 6:** You can sync along with tags (label, bookmark, and comments) in one-way sync only.
- **Note 7:** You can now use Organyze to sync folders without using an intermediate device like a pen drive or part of a hard disk.

 Use this feature to extract tags from previously synchronized folders received from others.

There are two ways you can do this. In Windows Explorer right click on a folder, use the context menu to select Organyze and then 'Extract synced tags' OR select Organyze in the system tray (at the bottom right of your screen), click 'Extract synced tags', and then browse to select a folder. Click the 'Start extracting' button. When the process is complete, the dialog box will close automatically. Now you can use the received tags.

Back up

Organyze enables you to back up your files and folders in a way that you can configure the backup process once and then forget about it – by saving backup settings for a scheduled backup. It also gives you enormous flexibility in backing up different folders in different ways.



Highlights:

- Back up an entire drive to another machine or to another drive in the same machine, or both.
- Back up different folders in a drive to different parts of different machines or to different drives in the same machine.
- In addition, back up your folders online to ensure greater insurance against any damage or destruction of the premises in which your machines are located.

- Maintain several versions of backed-up files. Use a reasonable (optimum) number that best suits your needs.
- Ideally, maintain different numbers of versions for different folders
 [e.g., you may wish to maintain only one additional version of an
 archived folder, from which you may access files once in a rare while,
 but maintain many (say, five) versions of the most active folders,
 which you access every day, so that you can recall earlier content you
 have deleted on different days].
- Scheduled backup to assure automatic backup, or manual backup of fixed settings.
- There is no restore function for the back up of files and folders.
 The reason: unlike with some other backup software, Organyze backs up your files and folders in the normal way or, if you prefer it, in a compressed format. All you need to do is go to the location in which the backup is maintained, and open (or unzip and then open) the file.
- Note 1: THIS IS VERY IMPORTANT Unless you're backing up an entire drive every time (convenient to configure but not efficient, since it will slow down the process), you need to create fresh backup configurations for new folders you have created, which lie outside existing folders being automatically backed up.

 You need not bother about this if your new folders are inside existing folders that are being automatically backed up.
- **Note 2:** Backing up an entire drive at one go causes another difficulty: you cannot then set different numbers of versions (or other options) for different folders. All the folders will have to be set for the same number of versions; this means that either you will have too few versions for your active versions, or, if you set many versions for the entire drive (and hence all the folders in the drive), you could quickly run out of space in the destination drive or machine.
- **Note 3:** If you have Organyze installed on your machine, you can back up your folders on another machine, even if that machine does

not have Organyze; but folders from that machine cannot be backed up either on that machine or anywhere else if it does not have Organyze.

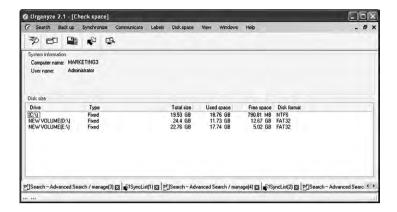
Backing up of application data

Organyze also enables you to back up your application data (labels, comments and bookmarks, and various settings, including your backup and synchronization presets) and your files and folders.

For the scheduled backup to take place, please ensure that:

- Both your source and destination machines / drives are switched on and connected at the scheduled time. If they are not, Organyze will do a backup the next time both machines are switched on, even if it is not the scheduled time.
- Organyze is in active mode in the source machine (even if you are not using it, it should show in the system tray at right-hand bottom of your screen.
- For application data backup, keep 5 to 10 copies to be safe.
- You can restore your application data backup whenever you re-install Organyze – so your application data (labels, comments and bookmarks, and various settings, including your backup and synchronization presets) can be retrieved. The restore information is stored in an XML file.

Caution: Please make sure you restore from the latest file (an XML file stored in a place you have determined). If you restore from an earlier file, application data created after that XML file was created will not be retrieved. But don't panic. If you do make a mistake, you can always do another restore, this time from the latest XML file; that will retrieve the latest application data.



Check disk space

Organyze allows you to see information about disk space on your machine. This is useful because the information helps you avoid selecting drives with less space as destinations for backing up files from other drives.

Suggestions

1

Create order out of chaos!

Organyze can help you create order from chaos. See how:

When you download pages (files) from the Web using the Organyze labeling process, save them anywhere, preferably in a folder named by the date or month of the download (e.g., 201101 for January 2011).

Now you've got chaos! You have a wide variety of files in a single folder. Open the Organyze 'Advanced search / manage' window, call all files labeled, say, 'Innovation' for the date range 1 to 31 January 2011. Then select them all and move them to a folder or sub-folder called 'Innovation' (or 'Innovation 2011' if the original folder or sub-folder has got too many files).

The labels and other tags attached to the files will remain intact.

Now you've got order out chaos!

2

On finding valuable old files and emails you've completely forgotten about, so that you can re-use previously created content instead of creating it all over again. How to do it? Here's how:

Let's say you have many drives in your machine and in an external hard disk, and the files date back 10 years. During these years you have sent out a few thousand letters, presentations, proposals and agreements to clients or potential clients; over half of them are archived in folders you rarely visit.

Now, when you've got to create a new proposal for a client, and need a certain type of information to be included (e.g., say, about separate charges for hosting of websites), you don't have to try and remember

which of the various documents you've sent out have a hosting section or clause in them. Where past documents contain information about hosting, you have already labeled them with the label 'hosting' (besides other labels relating to what those documents contain).

You also know that the information you seek should be relatively recent. So you select the date range for the past three years, and the labels 'hosting' and 'proposal'- and Organyze fetches the relevant documents instantly! You don't have to go from one client folder to another, or search through your archives or, for that matter, through your recent folders.

It's so easy! Try this with old photographs, songs, and other files.

3

To see how fast you can find files with Organyze, try this: attach one of a couple of labels (say, 'Testing' and 'Trial') to many files in different folders, sub-folders and drives in your machine (using any of the methods described in previous chapters for attaching labels). Then open the 'Manage files / folders' window of Organyze, and select one of the labels. Almost instantaneously you will see a list of files with that label in the main work area (on the right). Select the other label; and you will immediately see a list of files with this other label. It really doesn't matter where those files are stored.

Think of how much time you have saved, which you would otherwise have spent going from drive to drive, folder to folder, sub-folder to sub-folder and scrolling up and down the lists to find what you needed. **Think of how much time Organyze can help you save in a year!** You may be releasing at least 10 to 15 days of time this way, which you could use to do other work – or see a movie, or just relax!

This saving is in addition to the time and effort you save in other areas, including adding value to your files and folders, backing up, and synchronization – besides having the assurance of data safety that results from automatic, routine backups that happen very fast without your having to spend any time on them once you have configured them.

4

Avoid clutter after automatic labeling

To avoid clutter caused by too many same-name labels, try this: let's say you have a label 'Innovation' under a parent label 'Management', and your automatic labeling shows up another label 'Innovation' because that is the name of a folder or sub-folder somewhere in the path of your automatic labeling.

To clean up, after the auto-labeling is done, call all the files with the auto-labeled 'Innovation' label (it will be a separate label, not under 'Management'). Then select all the files (except those you think do not really fit the description 'Innovation' though you may have dumped them in the innovation sub-folder for convenience while downloading), and do this –

Detach the new 'Innovation' label; attach the 'Innovation label' under the 'Management' parent label; then delete the auto-created 'Innovation' label. That will delete the label and also remove the 'Innovation' label from the files you decided should not be tagged with the 'Innovation' label.

5

Tag your older files, folders and emails easily in the Organyze window, Windows Explorer, and MS Outlook

You can apply a label, bookmark, or comment simultaneously to many files in Windows Explorer and in the Organyze window. So if your files are organized with some basic classification method, **you should be able to label a large number of your older files and folders in a short period.** For emails, you can do this in MS Outlook and in the Organyze window.

ABOUT US

Organyze Systems Private Limited

Organyze Systems Private Limited, incorporated in December 2003, is a subsidiary of The Information Company Private Limited, and focuses on marketing software products. Organyze Systems offers software products in the document management and electronic content management area. Organyze 2.1 is a product of over three years of research and development, and is based on some proprietary technologies, for some of which we have applied for patents.

The Information Company Private Limited

The Information Company Private Limited, incorporated in March 1999, offers software, design and editorial services mainly for the corporate and financial sectors.

The Information Company (www.ticworks.com) was founded by Kiron Kasbekar, former Editor of *The Economic Times*, Bombay, Business Editor of *The Times of India*, and Managing Editor of *Business India*. Kiron is also the main author of the Informachine and Organyze software products. The company has provided consulting, design, software and content services to some of the biggest and most reputed groups and companies in India. These include the Tata, Aditya Birla, Essar and Axis Bank groups.

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