

TRACER

FROM INBOX TO INSIGHT

User Guide

Version 1.3.1

© Dotjoiner Pty Ltd • Sydney, Australia

www.tracermail.app

Email: Tracer.Tools@outlook.com

Last Updated: April 2026

1. Why TRACER?

You have been on a project for six months. Someone asks: what was agreed, who drove that decision, when did it change?

Finding the answer the old way means opening Outlook, scrolling back through hundreds of emails, cross-referencing replies, trying to remember which folder you filed things in. It takes days — and you still might miss something.

TRACER was built to solve that problem. It reads your Outlook mailbox, builds a structured index of every email and conversation thread, and gives you a fast, clean way to search and reconstruct the history of any project, relationship, or decision — in seconds.

Like it or not, even with all the documentation, CRM and project tools in the world, email is still the lowest common denominator. TRACER is the magnet that find the needle in the haystack.

What TRACER does

Thread reconstruction	Rebuilds conversation threads from scattered inbox and sent items.
Actor analysis	Shows who drove a conversation versus who just observed.
Attachment tracking	Tracks every version of every document sent across a thread.
Search	Search by subject, person, attachment name, or email content.
Open in Outlook	Opens the original email in Outlook with one click.
Reports	Generates structured reports: Audit Trail, Project Brief, Relationship Intelligence.
Settings	Switch mailbox accounts, select folders to index, and control refresh behaviour — all from within the app.

What TRACER does NOT do

No full body reading	Does not read email body content beyond a short preview (~500 characters).
No cloud	Does not upload, sync, or transmit any data from your machine (other than polling for a new version if you want it to). It runs entirely on your computer.
No modification	Does not modify or delete any email.
No account needed	Not a cloud service — no account, no login, no portal.

2. Installation

What you need

- Windows 10 or Windows 11
- Microsoft Outlook (classic desktop version) installed and configured with at least one email account
- Your TRACER licence key (provided separately by email)

⚠ Important: The newer web-based "New Outlook" is not supported. TRACER requires the classic desktop Outlook with a local mail file (PST or OST). If you are unsure, open Outlook and check the title bar — it should say "Outlook" not "New Outlook".

Installing TRACER

Step	Action
1 — Download	Open the download link sent to you by email. Save TRACER_v1.3.1_Setup.exe to your Downloads folder.
2 — Run installer	Double-click the file. Windows may show a SmartScreen warning — see the note below.
3 — Complete setup	Click through the installer steps. TRACER installs to C:\Program Files\TRACER\ and adds a desktop shortcut.
4 — Launch	Double-click the TRACER icon on your desktop. Your browser will open and TRACER will start.

⚠ Windows Security Warning — what to expect When you run the installer, Windows SmartScreen may display a blue warning: "Windows protected your PC". Your antivirus may also flag the file. This is normal for any new application from an independent developer. To proceed: click "More info" on the SmartScreen dialog, then click "Run anyway". If your antivirus quarantines the file, restore it and allow it to run.

3. First Run

The first time you launch TRACER, it will walk you through a short setup sequence. This only happens once.

Step	What happens
1 — Licence agreement	Read and accept the TRACER licence agreement. Tick the checkbox and click Accept.
2 — Licence key entry	Enter your licence key in the format TRACER-XXXX-XXXX-XXXX-XXXX. Click Activate OR agree to the (fully function) 30 day FREE TRIAL.
3 — Mailbox selection	TRACER detects your Outlook accounts and shows them as selectable tiles with inbox and sent email counts. Click the account you want to index.
4 — Folder selection	TRACER shows the full folder tree for the selected mailbox. Your Inbox and Sent folder are pre-ticked. Tick any additional folders you want included in your index. Selecting a parent folder automatically includes all its subfolders.
5 — Time range	Choose how far back TRACER should index. The default is 1 year (365 days). You can always re-index later with a different range.
6 — Email limit	The default is unlimited emails per folder, which gives the most complete index. Leave this as-is unless you have a specific reason to cap it.
7 — Indexing	TRACER builds its index from your mailbox. A progress screen shows emails processed and current phase. Outlook must remain open during indexing.

Estimated indexing times

Mailbox size	Estimated time
Small (under 2,000 emails)	30–45 seconds
Medium (2,000–5,000 emails)	3–5 minutes
Large (5,000–10,000 emails)	5–10 minutes
Very large (10,000+ emails)	10-20 minutes or more

Note: subsequent quick refreshes append new emails so only takes a few seconds.

i Outlook must remain open during indexing. You can continue working in Outlook — TRACER reads in the background.

4. The Main Interface

TRACER opens as a page in your default web browser at 127.0.0.1:8000. This is a local address — it is not a website and nothing is transmitted over the internet.

The header bar

At the top of every page you will see:

- The mailbox being searched (e.g. meridiangroup.com)
- Snapshot age and date range covered — e.g. Snapshot: 2 hours ago • Covers: 18/04/2025 – 18/04/2026
- Total thread and message counts, and threading percentage*
- Quick Refresh and Full Re-Index buttons
- A warning banner if any selected folders could not be indexed — with a direct link to Settings to fix it
- *If the threading percentage is lower than 85% then consider a full re-index

The four tabs

Tab	Purpose
Threads	Search and explore reconstructed email conversations. Your primary working view.
Actors	See every person who appears in your search results — their role, activity heat map, and the threads they appear in.
Attachments	See all documents attached to emails in your search results, including version histories.
Reports	Generate structured reports from your email data. All reports open in a new browser tab. See Section 8.

Settings

Click the ⚙ gear icon in the top right of the main interface to open the Settings drawer. From here you can:

- Switch to a different Outlook mailbox account
- Change which folders are included in the index
- Adjust the time range and email limit
- Setup an (optional) auto refresh (using quick refresh of new emails) on TRACER start up
- Trigger a Full Re-Index with the new settings
- Opt out of automated checks for new TRACER versions – or apply a one off search to check if a new version is available

i Changing mailbox resets folder selection and requires a Full Re-Index. Changing folders or time range only requires a Full Re-Index to take effect.

5. Searching

Type any word or phrase into the search bar and click Search (or press Enter). TRACER searches across email subjects, sender and recipient names, attachment filenames, and email body previews. The terms you enter have an implied "and" between them.

What you can search for

- A person's name or email address
- A project name, matter name, or subject keyword
- A document or file name
- A word or phrase you remember being in an email

Reading search results — Threads tab


Search results appear as a list of conversation threads. Each result card shows:

- Thread subject and date range
- Number of messages and participant list
- Matching emails within that thread, highlighted with ★ — these are the specific emails containing your search term

Opening a thread

Click any thread title to open the full thread view. This shows:

Element	What it shows
Message Cadence chart	A bar chart of message activity across the thread lifespan — one bar per day (or per hour for short threads). Shows communication intensity and peak activity days.
Actor Analysis panel	Primary Actors (To field), Observers (CC'd), and Role Changes (participants who shifted between To and CC).
Chronological email list	Every email in the thread in order — sender, recipients, date, attachments, and threading confidence.
ADDED / REMOVED badges	Green ADDED and red REMOVED badges show when participants joined or left the conversation.
Open this email	Opens the original message directly in Outlook.

 Tip: when you open a thread from a search result, TRACER positions the view at the emails that matched your search term — not at the top of the thread. Scroll up to see earlier messages or down to see later ones.

6. Actors View

Switch to the Actors tab after running a search to see every person who appears across your search results.

What each actor card shows

- Name and email address
- Classification: Primary Actor, Observer, or Mixed
- Number of threads they appear in and their active date range
- 12-month activity heat map — a contribution grid showing communication intensity across the last year (including day of week and number of emails per relevant day)
- Thread list — every thread they appear in, with the most recent activity date shown on the right of each row
- Relationship Report button — generates a full Relationship Intelligence report for that contact (see Section 8)

Actor roles

Role	Meaning
Primary Actor	Consistently in the To field. Active participant — decisions and actions are directed at them.
Observer	Consistently CC'd only. Aware of the thread but not a direct participant.
Mixed	Appeared in both To and CC across the thread. Role changed over time.
Role Changes	Where TRACER detected someone shifting from one role to another (e.g. To → CC). Shown as a deduplicated list of distinct transitions.

7. Attachments View


The Attachments tab shows every document sent as an attachment across the emails in your search results.

What each attachment record shows

- File name, number of threads and senders, date range
- Version history — where the same filename was sent multiple times, TRACER shows a numbered version history with timestamps and the thread it appeared in
- A link back to the thread where each version appeared
- Most recent activity date shown on the right of each thread row

Version tracking

TRACER automatically groups files it recognises as versions of the same document. A badge shows how many versions were found. This is useful for tracking document evolution — who sent what version, in which thread, and in what order.

 Example: Contract v1 sent 3 March, Contract v2_FINAL sent 14 March in a different thread — TRACER links these as two versions of the same document.

8. Reports

TRACER includes a dedicated Reports tab — the fourth tab in the main navigation. All reports open in a new browser tab and can be printed or saved to PDF using the Print / Save PDF button in each report.

How to access reports

- Click the Reports tab in the main navigation
- For Audit Trail and Project Brief — scope fields pre-populate from your current search and open thread
- For Relationship Intelligence — type a contact's email address directly, or click the Relationship Report → button on any Actor card

Audit Trail

A structured, timestamped narrative of a single email thread. Use this when you need a verifiable, exportable record of what happened in a specific conversation.

Section	Contents
Cover	Thread subject, message count, participants, date range, report generated date.
Reconstruction Methodology	How each message was linked (RFC header / Outlook index / heuristic) and confidence score.
Participant Roster	All participants with their role, sent/to/cc counts, and first/last active dates.
Message Timeline	Every message in chronological order with sender, recipients, body preview, attachments, and threading evidence.
Attachment Version Chains	All documents sent in the thread grouped into version chains.

Project / Engagement Brief

A structured brief covering all email activity scoped to a search query and/or domain filter. Use this to summarise the history of a project, matter, or engagement.

Section	Contents
Party Register	All participants across scoped threads with role, message counts, and activity dates.
Communication Timeline	One entry per thread, chronological, flagged where open items are detected.
Document Inventory	All document attachments across scoped threads, grouped into cross-thread version chains.
Open Items	Threads where your last message has not received a reply within the index window. Treat as a review prompt — may include some false positives.

Relationship Intelligence

A forensic contact summary for a single person — everything TRACER knows about your communication history with them. Trigger from the Reports tab or from the Relationship Report button on any Actor card.

Section	Contents
Relationship Summary	Total threads, total messages (sent/received), threads initiated, dominant role across all threads.
Communication Frequency	Monthly message table showing sent by them vs received by them, with inline bar chart.
Thread History	Every thread involving this contact with their role and contribution percentage.
Shared Counterparties	Other people who appear alongside this contact in 2 or more threads.
Subject Clusters	Most frequent words across thread subjects — shows topic focus of the relationship.
Document Exchange	All documents sent or received with this contact, direction-badged and with file sizes.

9. Settings

The Settings drawer lets you change what TRACER indexes without re-running the installer or touching any config files. Open it via the ⚙ gear icon in the top right of the main interface.

Mailbox selection

TRACER shows all Outlook accounts detected on your machine as selectable tiles. Each tile shows the account name and inbox/sent email counts. Click a different tile to switch accounts. Switching mailbox resets folder selection and requires a Full Re-Index.

Folder selection

The folder tree shows every mail folder in the selected account. Tick the folders you want TRACER to index. Selecting a parent folder automatically includes all its subfolders. You can tick Inbox only for a focused view, or include additional project folders for broader coverage.

💡 Inbox and your Sent folder are the recommended minimum selection. Including Sent items allows TRACER to reconstruct complete conversation threads — your replies and initiated threads will be visible alongside received emails.

Other settings

- Time range — how far back to index (default and maximum 365 days)
- Email limit per folder — maximum emails to index from each folder (default: unlimited)
- (optional) Auto-refresh on open — if enabled, TRACER will automatically run a Quick Refresh when it detects the snapshot is more than the configured threshold timeframe (default 1 hour)
- (optional) check on opening if there is a new version of TRACER available for download, Or, run the check in the settings tab as a one-off check.

Saving settings

Click Save in the Settings drawer. If you have changed folders or time range, TRACER will prompt you to run a Full Re-Index — this is required for the new settings to take effect.

10. Keeping Your Index Current

TRACER builds a point-in-time snapshot of your mailbox. New emails received after that point are not included until you refresh. The snapshot age is shown in the header bar.

Option	When to use
Quick Refresh ⚡	Your snapshot is less than 10 days old and you just want to pick up recent emails. Takes 10–20 seconds. Adds to the index but does not remove deleted emails.
Full Re-Index 🔄	You can comfortably keep using your snapshot from quick refreshes while the Threading % shows 90-100% or you are not regularly deleting emails.. Otherwise, it is recommended to run a full re-index every 1-2 months. NOTE: If you want to change settings, or you want a clean rebuild, run the Full Re-Index. This takes the same time as initial indexing.

i Auto-refresh: if enabled in Settings, TRACER will automatically run a Quick Refresh when you open the app and the snapshot is older than your configured threshold (default: 1 hour). You will see the progress screen briefly before the main interface opens.

11. Closing and Restarting

⚠ Always use the Close TRACER button in the top right of the main interface to shut down. Do not simply close the browser tab — the background TRACER process will remain running.

To restart: double-click the TRACER desktop shortcut. TRACER will load your existing index and open the search interface.

If a second browser tab opens, close the old one and use the new one.

12. Privacy and Data Security

TRACER is designed for use with confidential professional information.

What TRACER stores (locally, on your PC only)	What TRACER never touches
Email subjects and dates	Full email body content
Sender and recipient names/addresses	Attachment content or file data
Attachment filenames and sizes	Passwords or credentials
A short preview (~500 characters) of each email body	Anything transmitted externally

All data is stored in %LOCALAPPDATA%\TRACER\ on your own machine. Nothing leaves your computer (other than the check for a new version if you allow it)

i The only outbound network call TRACER makes is a version check to tracermail.app on launch, which transmits only the current version number. This is disclosed in the licence agreement.

13. Known Behaviours

Behaviour	Explanation
New Outlook not supported	TRACER requires the classic desktop Outlook. It does not work with the newer web-based New Outlook. If you have New Outlook installed, you will see a clear message at startup.
Extra browser tab on relaunch	If TRACER was running in a browser tab that you closed without using Close TRACER, relaunching will open a second tab. Close the old one.
Snapshot does not update in real time	TRACER works from a point-in-time snapshot. Emails received after the last index run will not appear until you run a Quick Refresh or Full Re-Index.
Deleted emails may appear in Quick Refresh results	Quick Refresh adds new emails but does not remove emails you have deleted since the last run. Use Full Re-Index for a clean rebuild.
Threading percentage	The threading percentage shown in the header reflects the proportion of emails with standard email headers (Message-ID). Emails from older or non-standard mail systems may have lower threading percentages — this is a data quality indicator, not a fault.

14. Getting Help

Channel	How
Report a bug	Use the Report Bug button in the top right of the main interface.
Share feedback	Use the Share Feedback button in the main interface.
Email support	Tracer.Tools@outlook.com — for installation issues, licence questions, or anything the in-app buttons don't cover.