

ColumbusDoc - User manual

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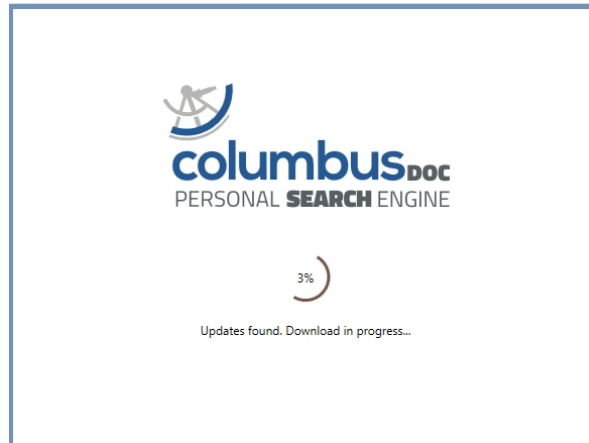
Introduction

ColumbusDoc is an automatic cataloguing and text indexing system to be used for your own email and cloud storage accounts, aimed to allow an organic vision of all their documents and a unified search independently from their sources.

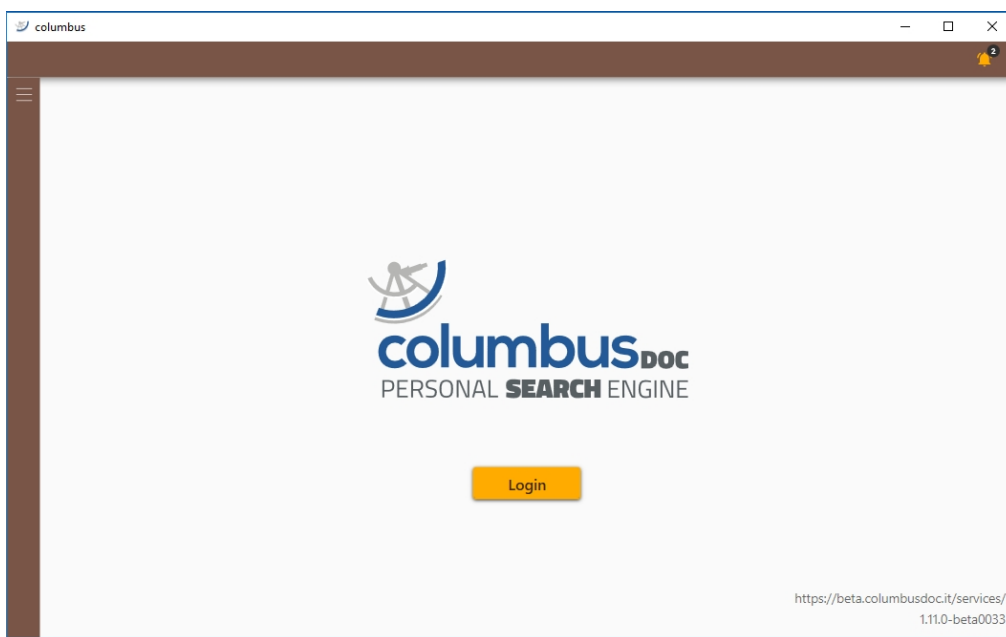
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Columbus login

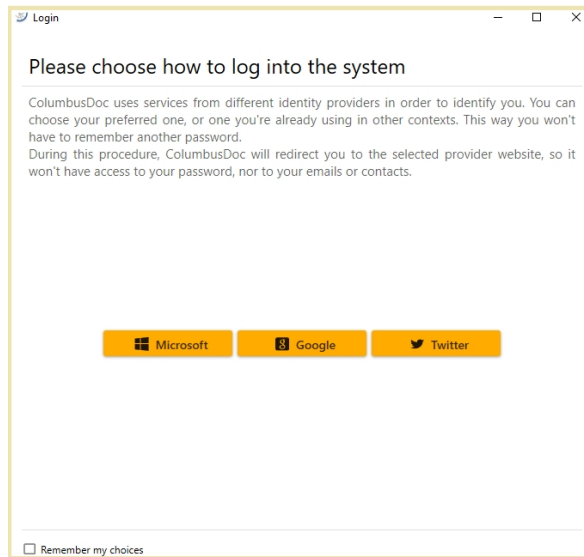
When running Columbus the system displays the following window while downloading possible updates.



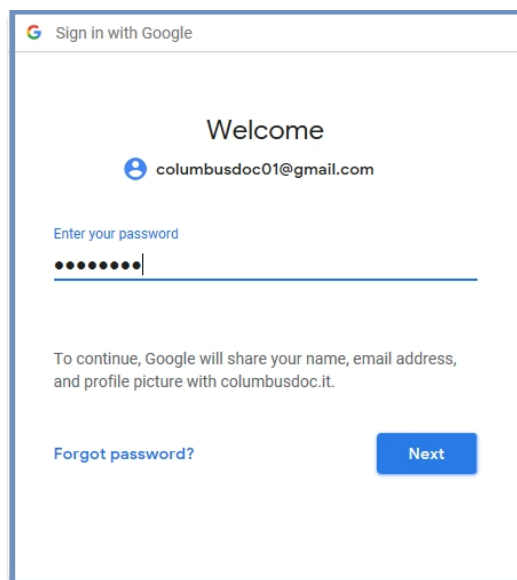
the user can now click **Login** from the following box



and choose the provider to log into the system:



the user can flag the check box "Remember my choice" in order to avoid this step the next time.

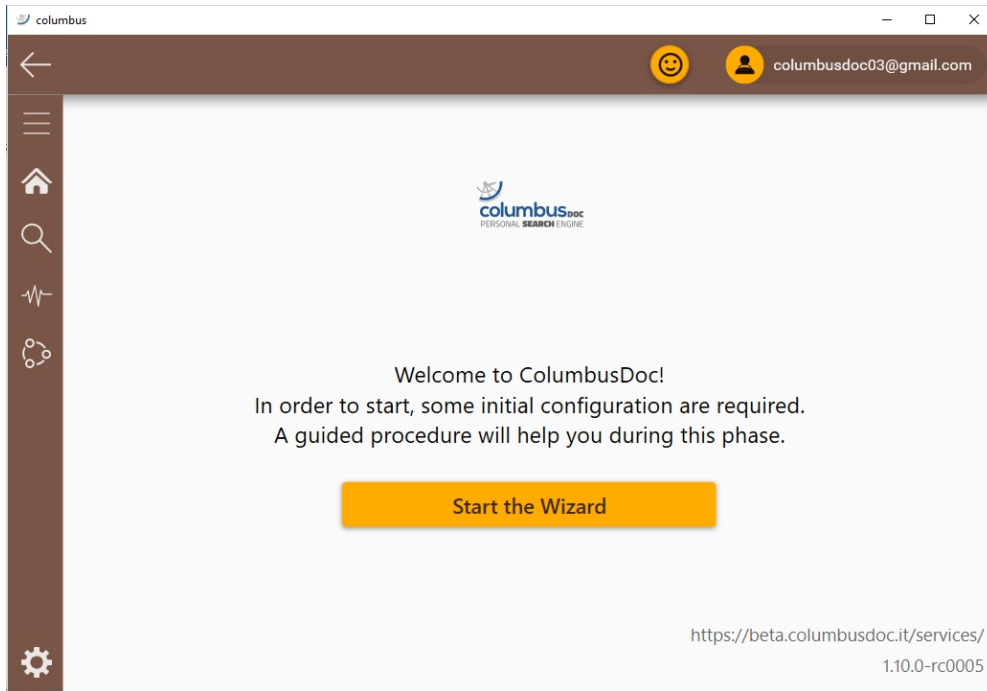


After entering the credentials to access through the selected provider, the user can click [Next](#) to open Columbus homepage.

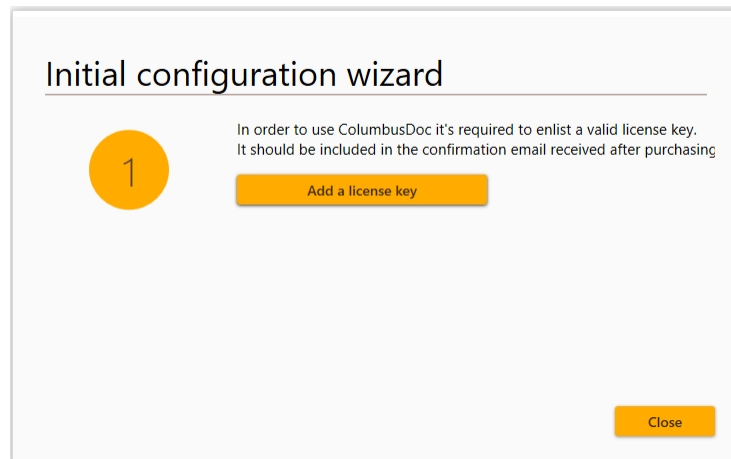
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Start the wizard

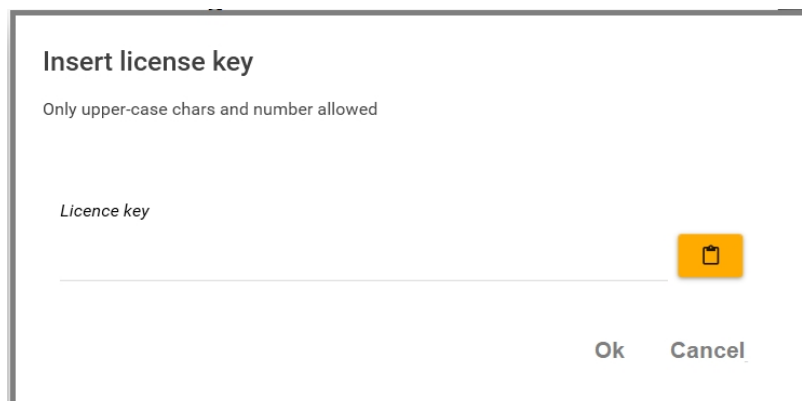
The first access to Columbus prompts the user to follow a guided wizard in order to enter the licence details and other initial data required for the use of the system:



Click **Start the Wizard** and then **Add a license key** from the dialogue box:

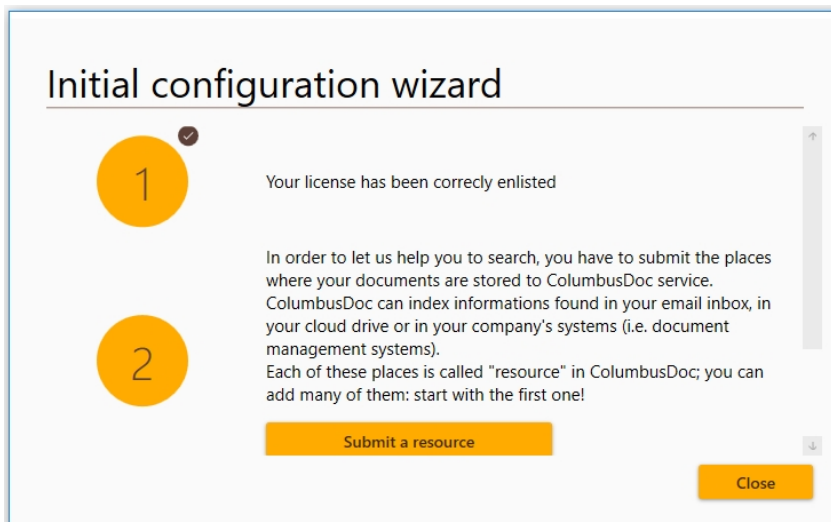


Enter the license Key into the specific field and click OK to confirm

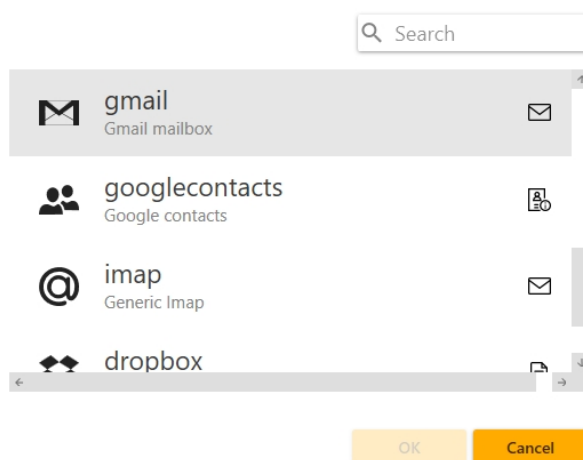


if all the numbers are correctly entered the system displays the message of successful operation and starts up the configuration.

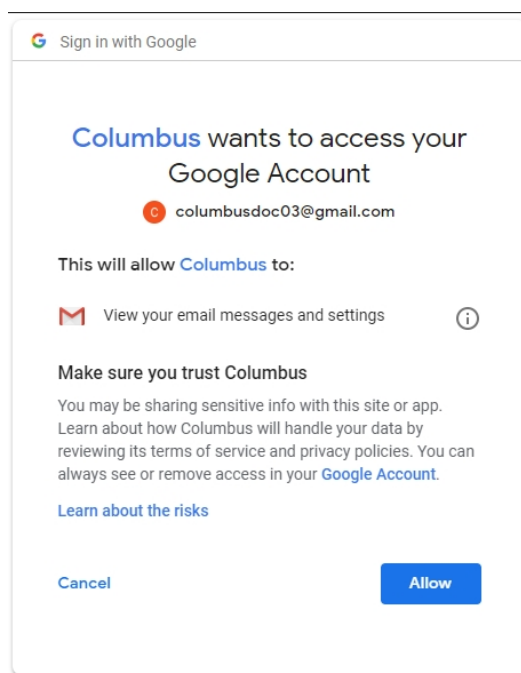
the system displays again the initial configurazion wizard window with a check on the first step correctly performed:



the second step requires a resource to be added; by clicking the button **Submit a resource** it's possible to enter the first resource in the user's archive (the one used to access the system)



Select the resource of interest (in this example Gmail) and confirm by clicking OK; the system displays the following message to request access to the Google account.



Click **Allow** to display the following window where it's possible to set a start date of the folders management through the calendar on the top left side

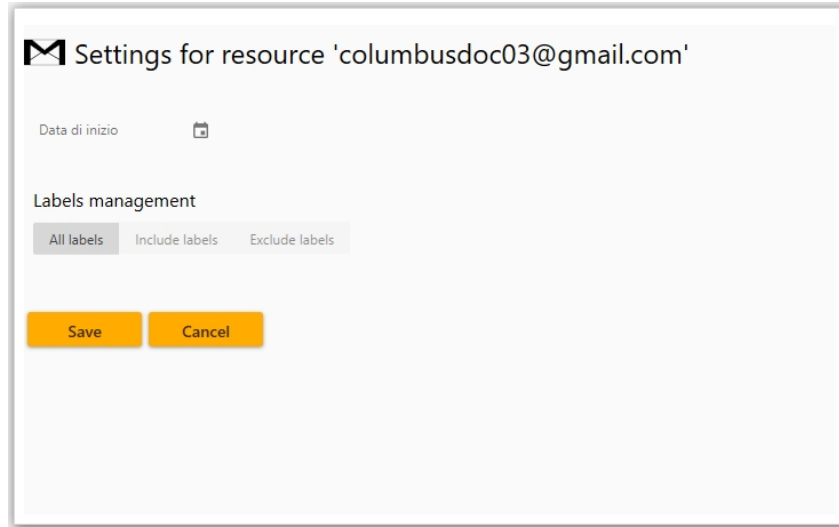



and decide if federate all the folders, or only include or exclude some of them through the buttons

All folders

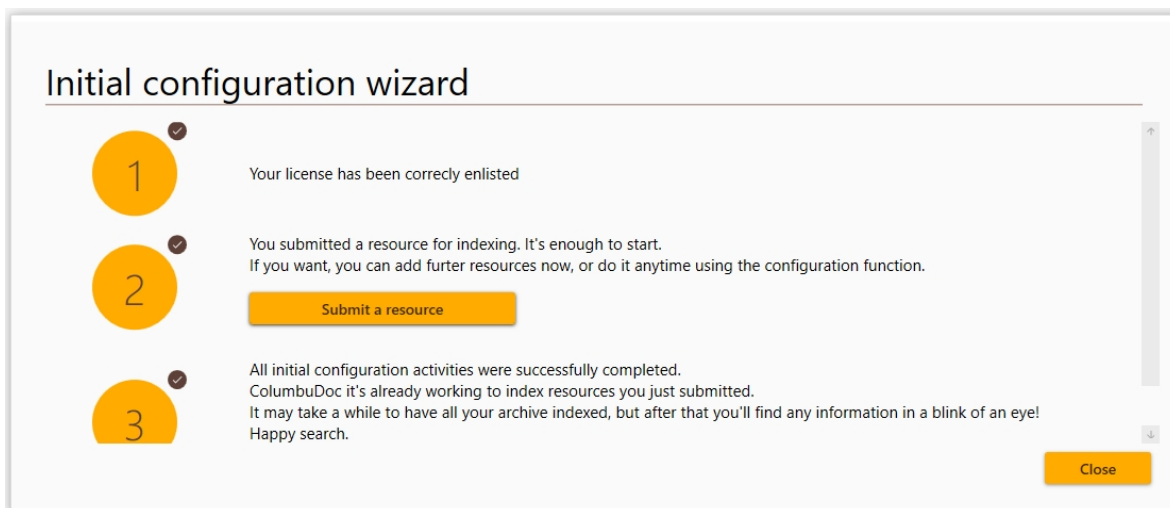
Include folders

Exclude folders



After selecting the folders to include or exclude click the button  to confirm the setting.

The system displays now the Initial procedure window completed with all the required steps;

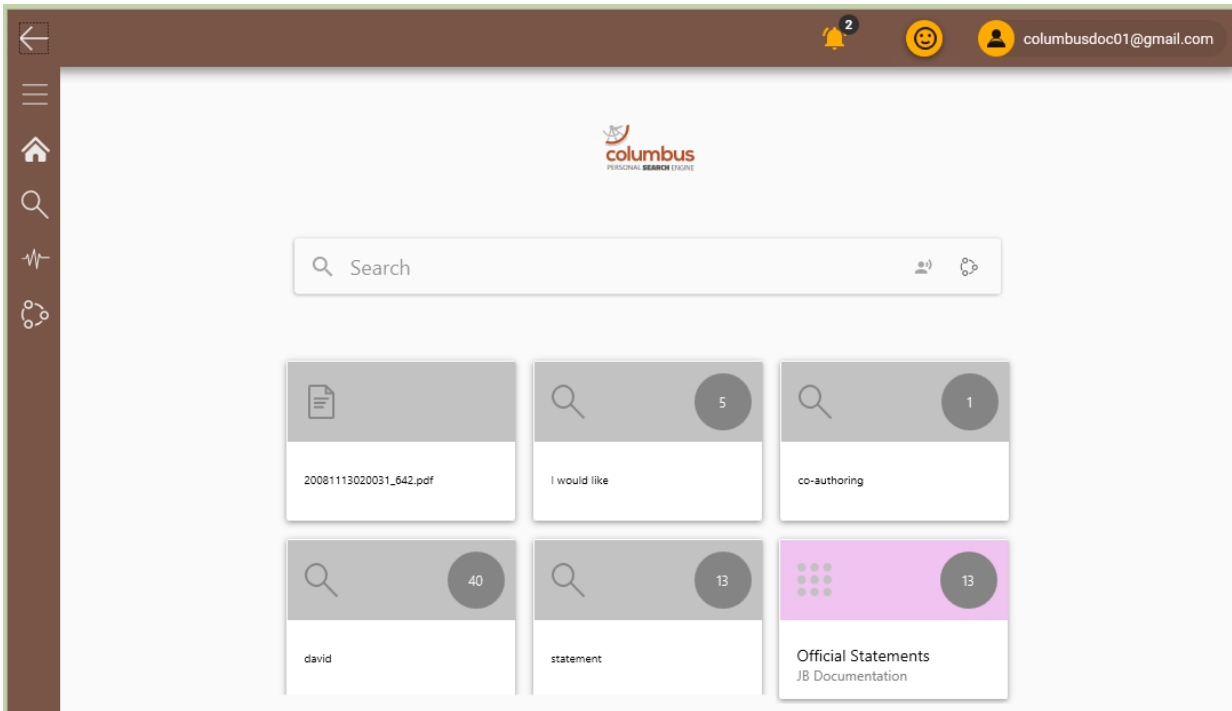


It's possible to add new resources from this window by clicking  or from the Account setting section (see paragraph [Resources](#))


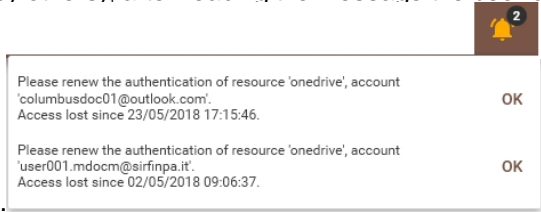


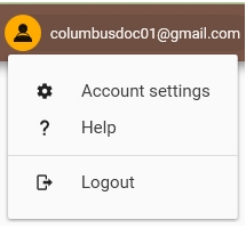
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Homepage

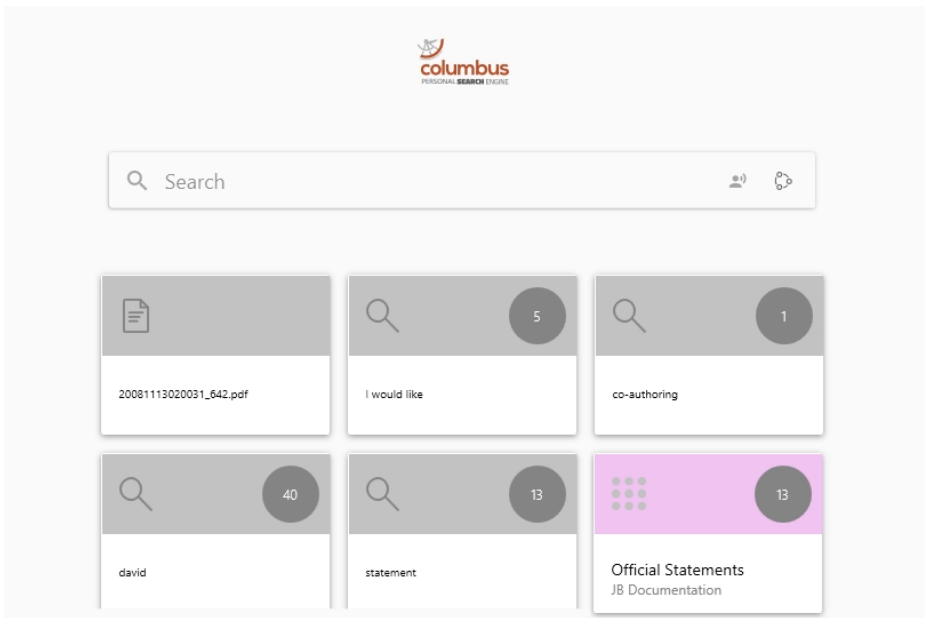
The homepage displays the following screen including a search box, where it's possible to enter any search value, a vertical bar on the left containing commands to access other functionalities and a top bar with other commands:



The top bar displays the following icons:

	<p>allows to display any possible alert notified by the system (expired authentication, expired licence, smartset shared by others); after reading the message the user can remove it by clicking OK</p> <div data-bbox="167 981 710 1191">  </div>
	<p>allows to send any sort of feedback (problems or suggestions) either by texting a message or by recording a session (see paragraph "Feedback").</p>
	<p>allows one of the following actions: access the account settings, open the online help and logout the system</p> <div data-bbox="159 1288 406 1512">  </div>

Below the search string the system displays some boxes called "tiles":



Each tile is represented by a specific icon on the top left side depending to each group of category:

<p>Official Statements JB Documentation</p>	<p>Saved Smartsets (see paragraph “Save the search as Smartset”);</p>
<p>statement</p>	<p>Last search;</p>
<p>how to compose a personal statement</p>	<p>Last document viewed;</p>

the number on the top right side is the total of records related to a search. Such number is constantly updated to the archive content.

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Left side menu and top bar

the menu bar on the left side contains the following commands represented by icons:

	<p>to go back to previous screen;</p>
	<p>to expand the menu and display both icons and text;</p>
	<p>to display the Homepage;</p>
	<p>to access the Advanced Search (See paragraph Advanced Search);</p>
	<p>to display the Search Analysis section and edit a smartset (see paragraph Edit Smartset);</p>
	<p>to access the Sharing Hub and display the shared files (see paragraph Share Smartset)</p>
	<p>to go back to previous screen;</p>

The top bar displays the following icons:

	<p>allows to display any possible alert notified by the system (expired authentication, expired licence, smartset shared by others); after reading the message the user can remove it by clicking OK</p>
--	--

Please renew the authentication of resource 'onedrive', account 'columbusdoc01@outlook.com'.
Access lost since 23/05/2018 17:15:46. OK

Please renew the authentication of resource 'onedrive', account 'user001.mdocm@sirfinpa.it'.
Access lost since 02/05/2018 09:06:37. OK

allows to send any sort of feedback (problems or suggestions) either by texting a message or by recording a session (see paragraph [Feedback](#)).

allows one of the following actions: access the account settings, open the online help and logout the system

columbusdoc01@gmail.com

- Account settings
- Help
- Logout

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Tiles

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Search

The search function, available from the homepage, allows to search a specific data existing in any source included in the user s archive (mail account, Cloud storage etc); the data of interest can be either present in the body of a mail or in a document attached to it, or in a cloud drive.

The user can enter one or more terms into the search string and click the button to start up the search:

Each search results, matching the input parameters, is displayed in a preview box containing the source data details; on the left side the system displays the sum of results and group them in categories; it s also possible to apply a filter (see paragraph [Filter Results](#))

←
☰
🏠
🔍
⚙️

🔔 3
😊
👤 columbusdoc01@gmail.com

☰ Cards
🔍 statement

Annotations

None 13

Attachments

With attachment 9

Without attachment

Category

CATEGORY_PERSONAL 9

Content kind

Document 9

Email 4

13 item(s) found (0.321 seconds)

how to compose a personal statement

columbusdoc01@gmail.com

From: columbusdoc02@gmail.com
17/07/2018 11:08

hi i'm attaching the wizard to create a personal statement see you soon Malcolm

OPEN

What is a personal statement.docx

columbusdoc01@gmail.com

From: columbusdoc02@gmail.co...
17/07/2018 11:08

OPEN

personal statements

columbusdoc01@gmail.com

From: columbusdoc02@gmail.com
17/07/2018 11:07

hello i'm attaching herewith the statement required

OPEN

BankStatementChequi...





columbusdoc01@gmail.com


From: columbusdoc02@gmail.co...
17/07/2018 11:07

OPEN

The yellow icons displayed on the top left side of each result specify the different data source:

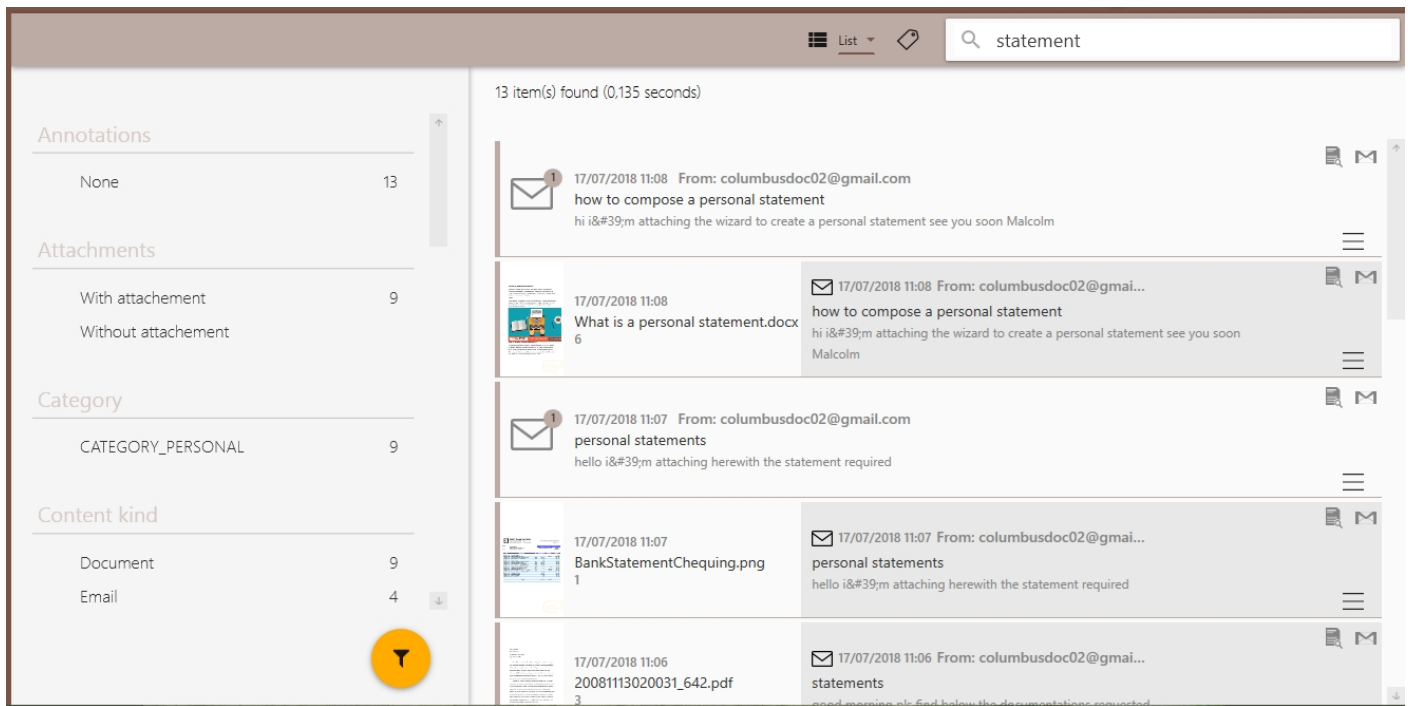
10 / 41

	term mentioned in a document contained in a cloud drive;
	term mentioned in the body or subject of a mail
	term mentioned in a sent mail
	term mentioned in a document attached to the mail;

The result display in cards mode can be shifted in list mode by clicking the dropdown menu  and selecting the required mode.



By selecting the *list* mode the results will be listed in the following way:



13 item(s) found (0.135 seconds)

Annotations

- None 13

Attachments

- With attachment 9
- Without attachment

Category

- CATEGORY_PERSONAL 9

Content kind

- Document 9
- Email 4

17/07/2018 11:08 From: columbusdoc02@gmail.com
how to compose a personal statement
hi i'm attaching the wizard to create a personal statement see you soon Malcolm

17/07/2018 11:08 From: columbusdoc02@gmail.com
What is a personal statement.docx
6
how to compose a personal statement
hi i'm attaching the wizard to create a personal statement see you soon Malcolm


17/07/2018 11:07 From: columbusdoc02@gmail.com
personal statements
hello i'm attaching herewith the statement required

17/07/2018 11:07 From: columbusdoc02@gmail.com
BankStatementChequing.png
1
personal statements
hello i'm attaching herewith the statement required

17/07/2018 11:06 From: columbusdoc02@gmail.com
20081113020031_642.pdf
3
statements
good evening, I'd like to request the documents requested

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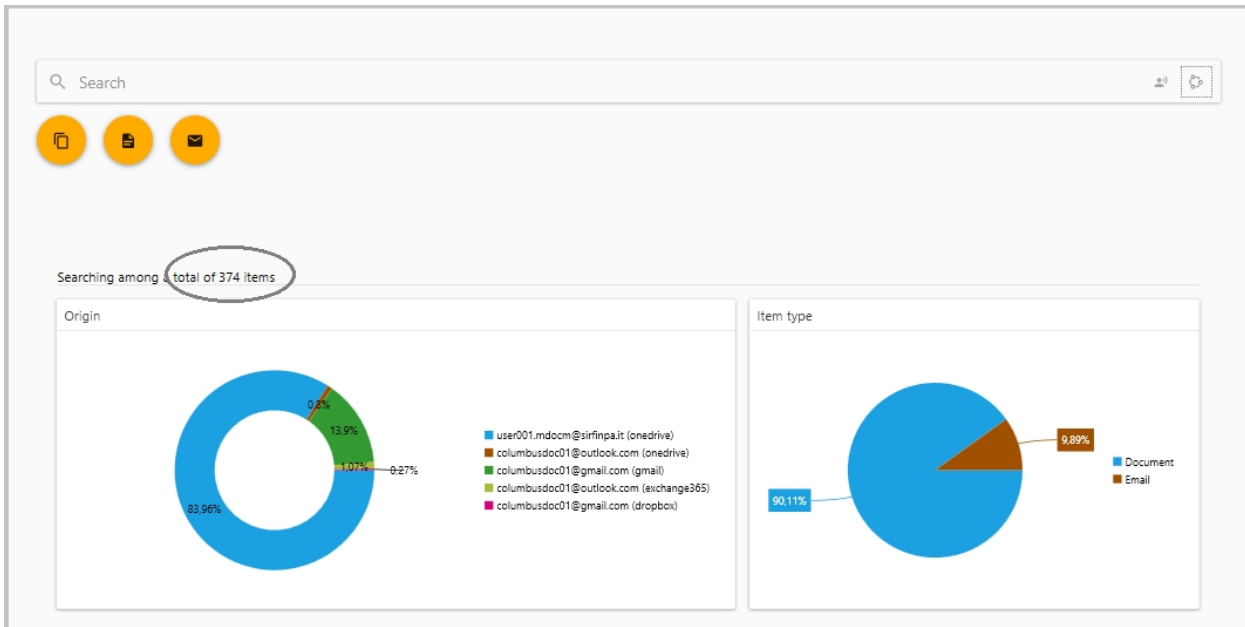
Include elements shared by others

The button , displayed in the Advanced Search string, allows to include in the search the itimes shared by others (see paragraph [Shared with me](#))

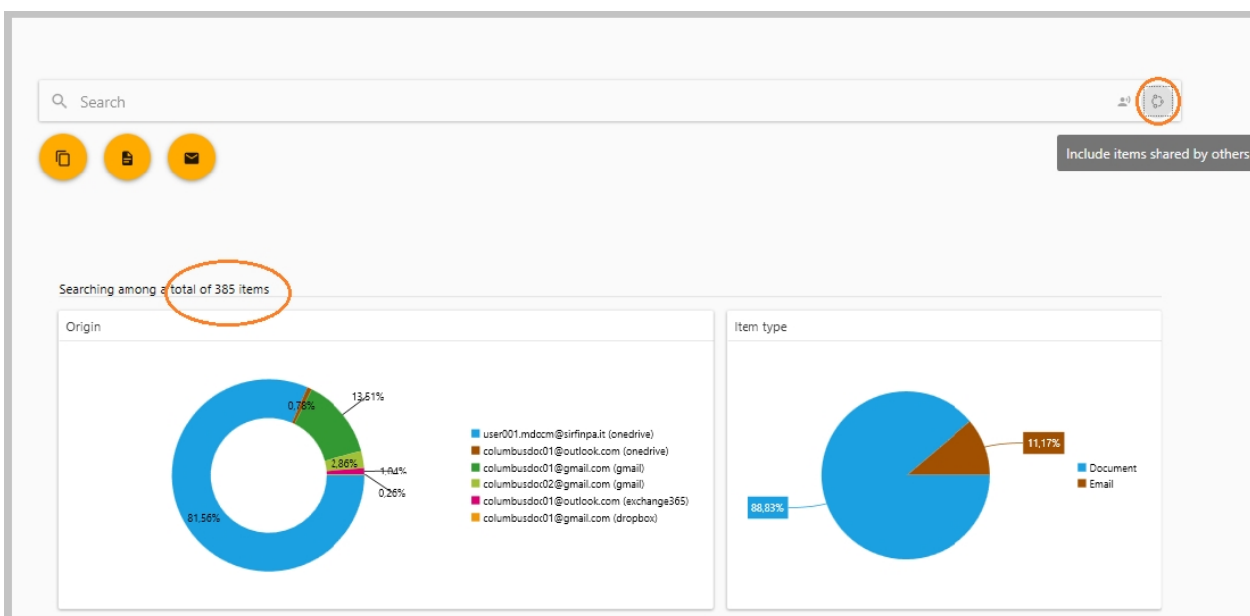
When clicking such button, before running the search, the system will update the total of items where the search will be performed;

When clicking such button the system updates the graphic with the total of items where the search will be performed;

the following images display the total among the items the system is searching before clicking the 




and the total of items increased after clicking such button



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Natural language



The button  allows to activate the natural language query through which it's possible to enter terms in any form, including a statement, a question etc;

For example the user can ask the system any question like: "Find all documents from Ed Smith " or "how to make a personal statement" ; the system translate such questions in an ordinary query and return the results matching the input parameters.

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Manage a search result

From the result preview (both *Card* and *List* display mode) it s possible to perform the following actions:

	to open and consult the search result (see paragraph Consult data)
	to open the menu with the following actions:

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Download optimized version</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Find identical items</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Share document with a link</div> <div style="border: 1px solid #ccc; padding: 5px;">Open email message in Gmail (columbusdoc01@gmail.com)</div>	<p>Download optimized version: allows to download a file in a version passed through OCR in order to be able to select the text</p> <p>Find identical items: allows to find identical files to the one selected, if existing in the archive, in order to find out all the other locations</p> <p>Share document with a link: allows to provide an access link to the document if not requiring credentials</p> <p>Open email message in Gmail: Opens the mail from the web client of the source provider</p>
--	--

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Top bar commands

The search result screen displays a top bar with the following commands



Titolo (crescente)	<p>the user can click the down arrow to sort the result in base of Title, Item date or Ranking</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-top: 5px;"> Title (ascending) Title (descending) Item date (ascending) Item date (descending) Ranking </div>
Cards	<p>The user can click the down arrow to change the result display from card to list mode (see paragraph Search)</p>
	<p>Allows to save the current search as Smartset (See paragraph Analysis > Smartset > Create Smartset)</p>

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Filter a result

It s possible to filter a search result by selecting a category from the left side panel where all the results are grouped in categories; for example to display the results belonging to a specific year, the user can select the year of interest from the category Date (Year):

Date (Year)	
✓ 2018	11
2017	4

and refine in this way the number of search results which will be automatically updated on the top right side:

The screenshot shows the ColumbusDoc search interface. At the top, there is a search bar containing the term 'statement' and a 'Cards' view selector. Below the search bar, it indicates '11 item(s) found (0,004 seconds)'. On the left side, there is a 'Current filter' panel with the following settings:

- Date (Year): 2018
- Category: CATEGORY_PERSONAL (11 items)
- Content kind: Document (5), Email (6)
- Date (Month): luglio 2018 (11 items)

The main area displays four search results in a grid view. Each result shows a preview of an email. A yellow circular button with a downward arrow is located at the bottom right of the filter panel.


clicking the button  will display the list of the filter categories where it's possible to uncheck one or more items:

The 'Filter' dialog box is shown, listing various filter categories. All categories are currently checked with a checkmark:

- General
- Annotations
- Attachments
- Category
- Content kind
- Date (Year)
- Direction
- Format
- Page count
- Path
- Provider
- Recipient address
- Resource account
- Sender address
- Sender's domain


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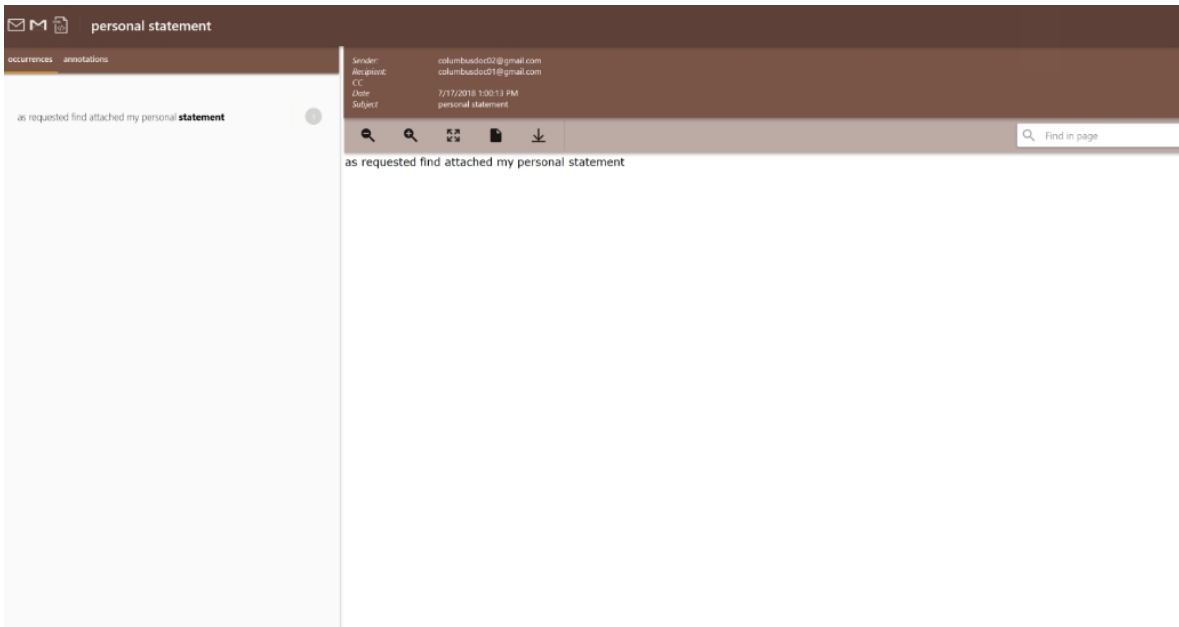
Consult data



To consult a search result the user can move the mouse over the result preview and click the button  on the bottom left side:

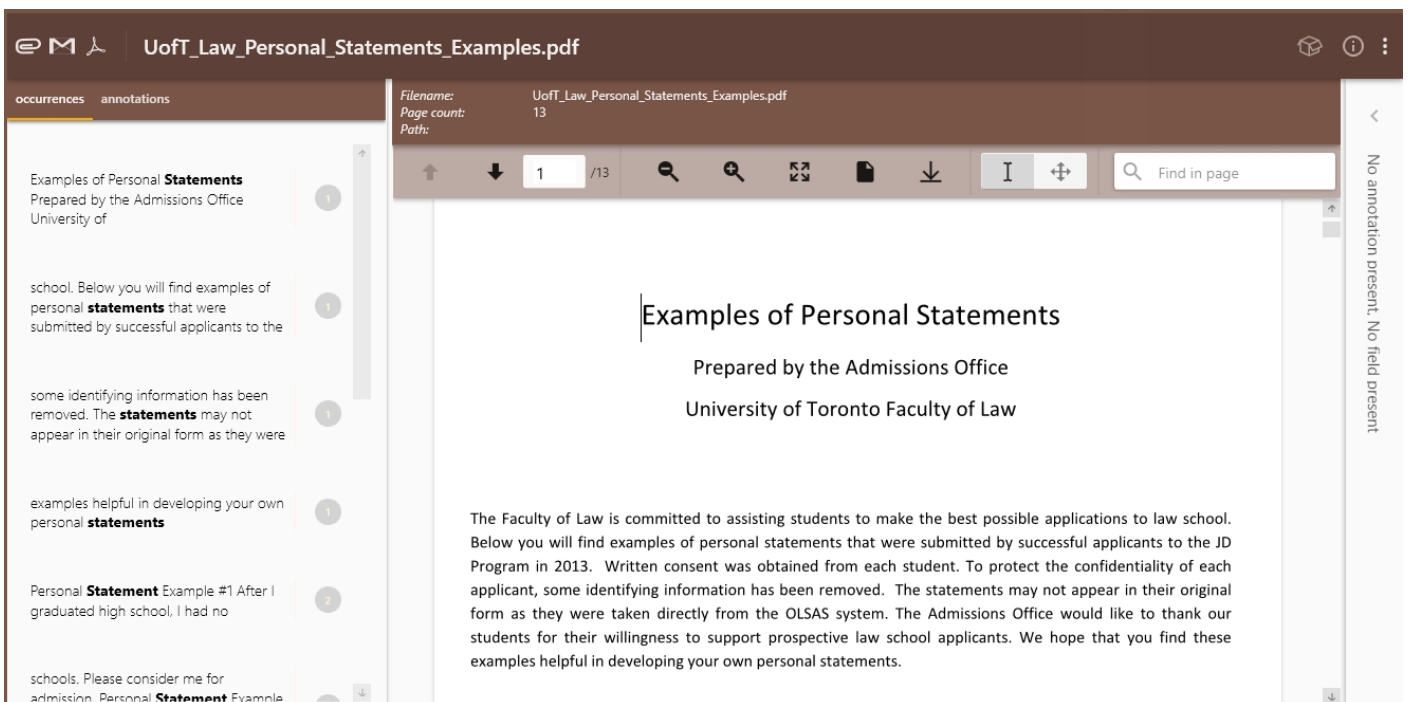
The screenshot shows a search result preview for 'personal statements'. It displays the sender's email address (columbusdoc01@gmail.com), the recipient's email address (columbusdoc02@gmail.com), and the date (17/07/2018 11:07). The body of the email is partially visible, showing 'hello i m attaching herewith the statement required'. An 'OPEN' button is located at the bottom left of the preview.

NOTE: If the result display is set in "list" mode the user can double click the item of interest from the list;

When the search term is mentioned in a mail  it will be displayed, either in the subject, in the body or in other fields of the mail, through the following screen:



If the search term is mentioned in a **document attached** to a mail  or in **document from cloud drive**  the system displays the document showing on the left side two panels: **occurrences** and **annotations**:



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Occurrences

The panel **occurrences**, on the left side, displays the list of occurrences related to the term mentioned in the document:

The screenshot shows the ColumbusDoc interface for a PDF document titled "UoFT_Law_Personal_Statements_Examples.pdf". The document is on page 13. The left sidebar shows search results for the term "statements", with occurrences listed next to their corresponding page numbers (1, 1, 1, 1, 2, 2). The main document view shows the title "Examples of Personal Statements" and the text: "Prepared by the Admissions Office, University of Toronto Faculty of Law. The Faculty of Law is committed to assisting students to make the best possible applications to law school. Below you will find examples of personal statements that were submitted by successful applicants to the JD Program in 2013. Written consent was obtained from each student. To protect the confidentiality of each applicant, some identifying information has been removed. The statements may not appear in their original form as they were taken directly from the OLSAS system. The Admissions Office would like to thank our students for their willingness to support prospective law school applicants. We hope that you find these examples helpful in developing your own personal statements."

Each occurrence shows beside the page where the term is mentioned:

Close-up of a search result entry in the sidebar. The text reads: "truest and fullest sense of the word. Personal Statement #2 (Optional Essay) There are several goals that". To the right of the text is a circular icon with the number 2 inside, indicating the page number where the term is found.

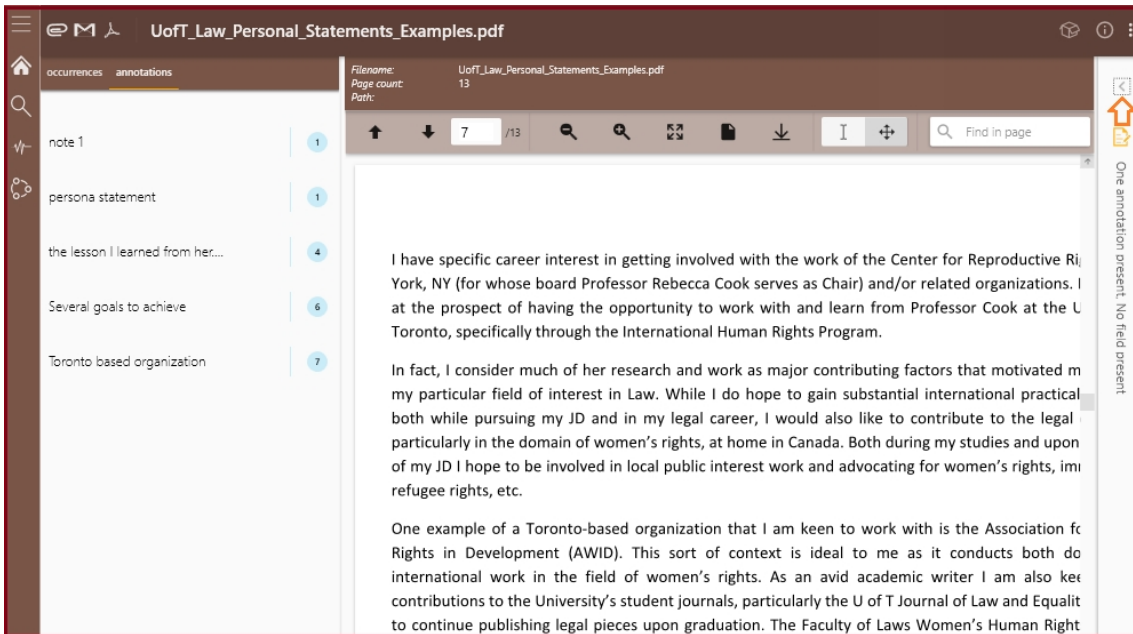
the user can click any occurrences listed to locate the term in the document:

The screenshot shows the ColumbusDoc interface for a PDF document titled "UoFT_Law_Personal_Statements_Examples.pdf". The document is on page 3. The left sidebar shows search results for the term "statements", with occurrences listed next to their corresponding page numbers (1, 1, 2, 3, 4, 5, 6, 7, 8). The main document view shows the text: "Deciding on a career has not been a straightforward process for me. But the self-knowledge I have gained over the last four years makes it clear to me that law is the right choice. Economics has given me a deeper understanding of the world and my place in it, but understanding is not enough. I want to improve the systems that directly effect people's daily lives, specifically through work in domestic public policy. This may sound naive. Many people have left university with this dream only to be knocked in the teeth by reality. And I am prepared for this. I may not be able to facilitate all the change I would like, but if I am able to lie down at the end of the day and say wow, we really did a lot of good today, I know that I will be satisfied. I believe that an education in law is an extremely useful tool in making this dream happen. I want to attend The University of Toronto because it has an unparalleled reputation in terms of the quality of students, faculty, and education. Law students at U of T do not need to wait until graduation to start having a positive impact on their community. They do so through various legal clinics and pro bono work. Their commitment to the local and global community makes this university my top choice among law schools. Please consider me for admission. Personal Statement Example #1 (Optional Essay) Throughout my time in high school, I was involved in a lot of extracurricular activities. When I graduated I earned the Gold Medal for the graduate who best combines academic achievement with overall contribution to school life. I twice represented my class on student council, co-edited my high school newspaper, peer-

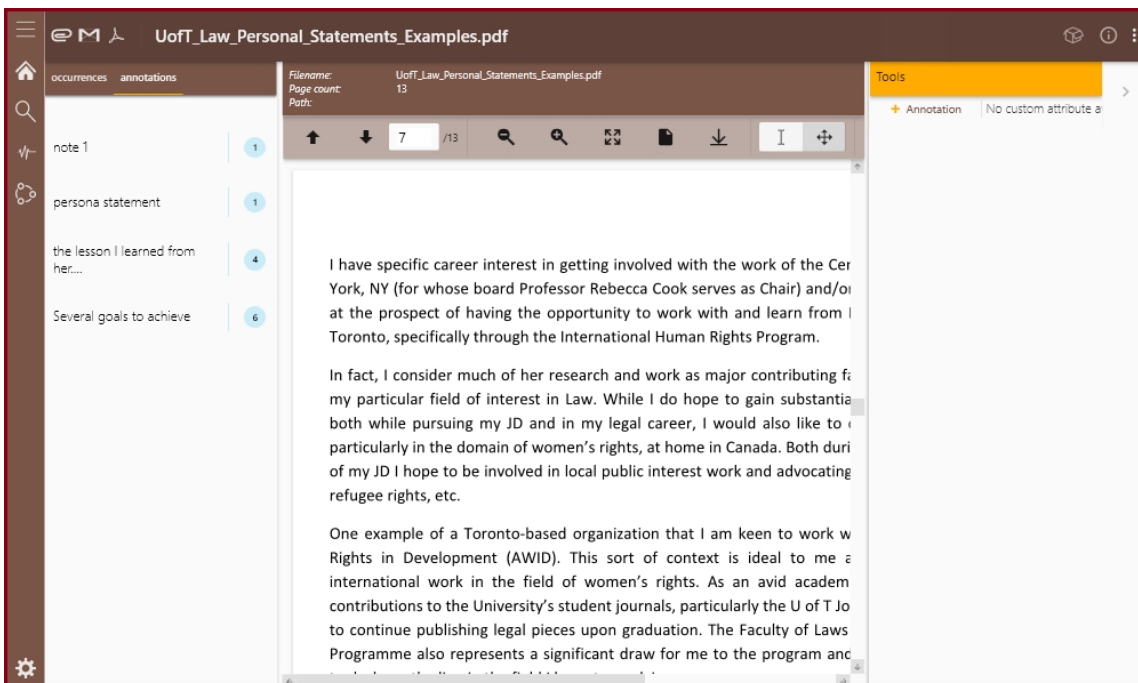
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Annotations


The panel **annotation** available on the left side allows to insert one or more annotation into the document; the user can click the arrow on the right vertical bar as shows below:

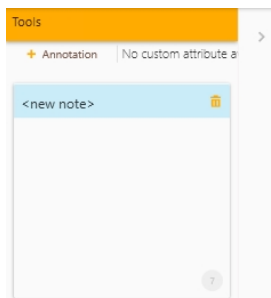


to open the following tool space on the right:

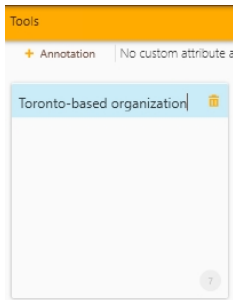


to add an annotation on a specific page of the document the user can select the page of interest from the top bar

and click the  button on the right side to display the new note label:

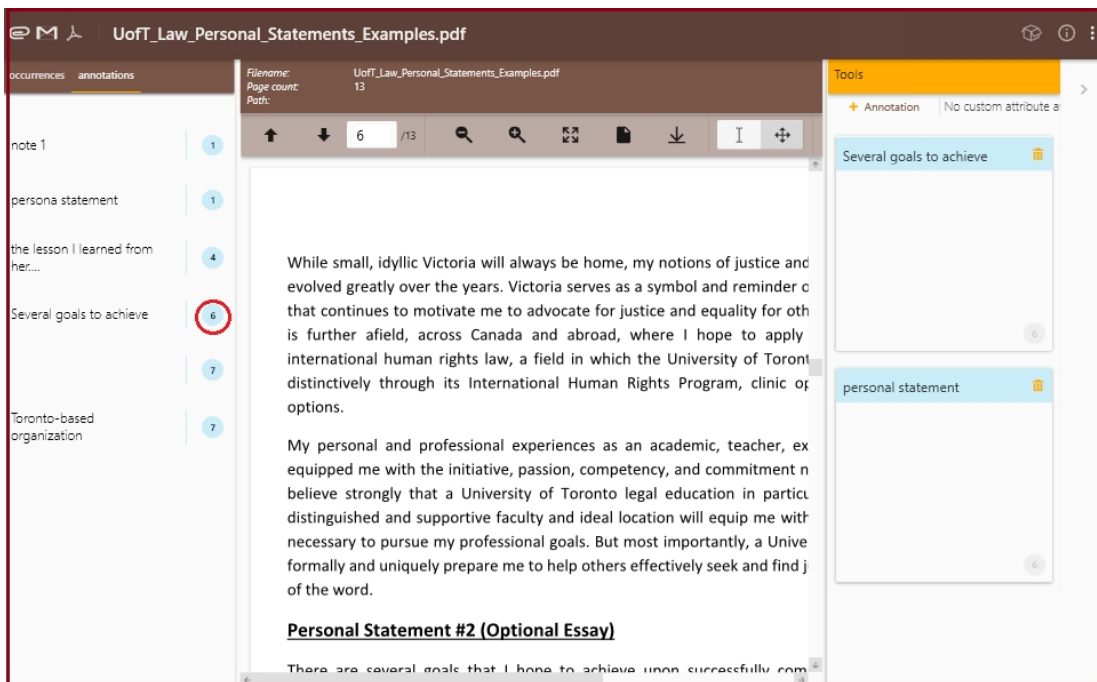


By clicking on the <new note> label it's possible to enter the annotation related to the selected page:




The user can add one or more annotation for each page of the document by following the same procedure;

the left side panel annotation is updated each time a new annotation is added; by clicking the number beside the note the system displays the page where that annotation is present showing on the right any other ones added in the same page.

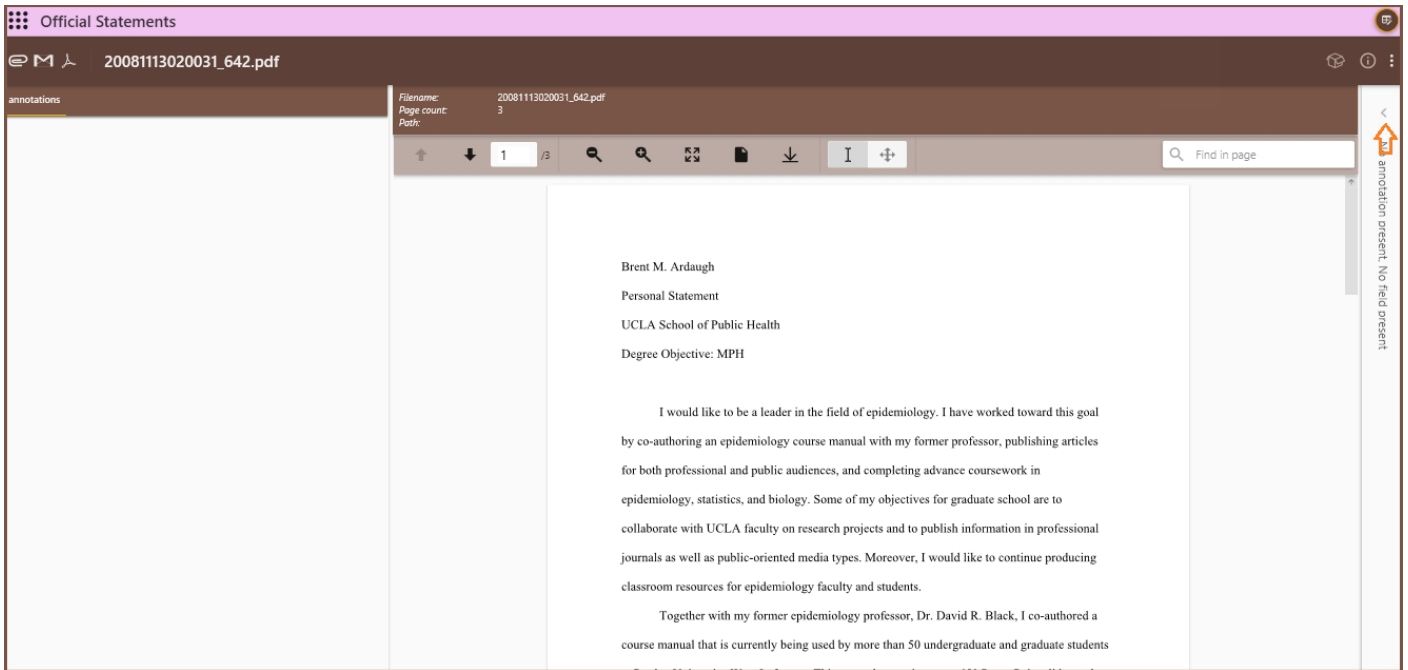


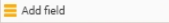
Attribute

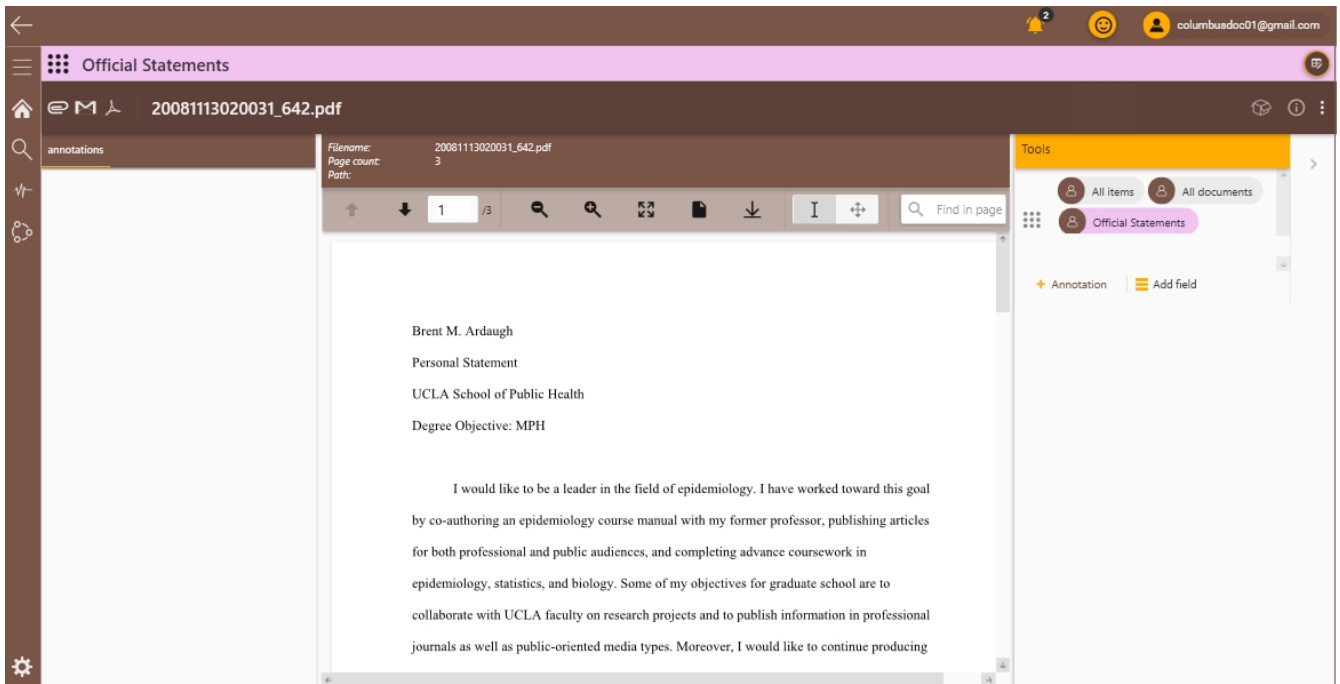
When a document is opened following the exploration of a smartset, the pannel **Annotations** enables the button add  button to enter a *Custom Attribute* previously created (see paragraph [Custom Attribute](#))



Adding a Custom Attribute is aimed to create actual structured data which will be used as specific filters in a search result through Smartset

After opening a document among the results of a Smartset to which a *custom attribute* has been associated the user can click the arrow from the vertical bar on the right as displayed below:

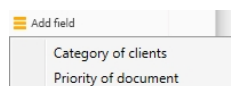


The Tools panel displays on the top any other possible smartsets which include the same document and enables the  button through which it's possible to add an attribute:



After selecting a page  where to add the *custom attribute* the user can click 

The list of the available attributes is displayed where it's possible to select the one of interest



depending on which type of custom attribute is selected the system displays the list of the allowed values, a boolean field, a data time field etc;

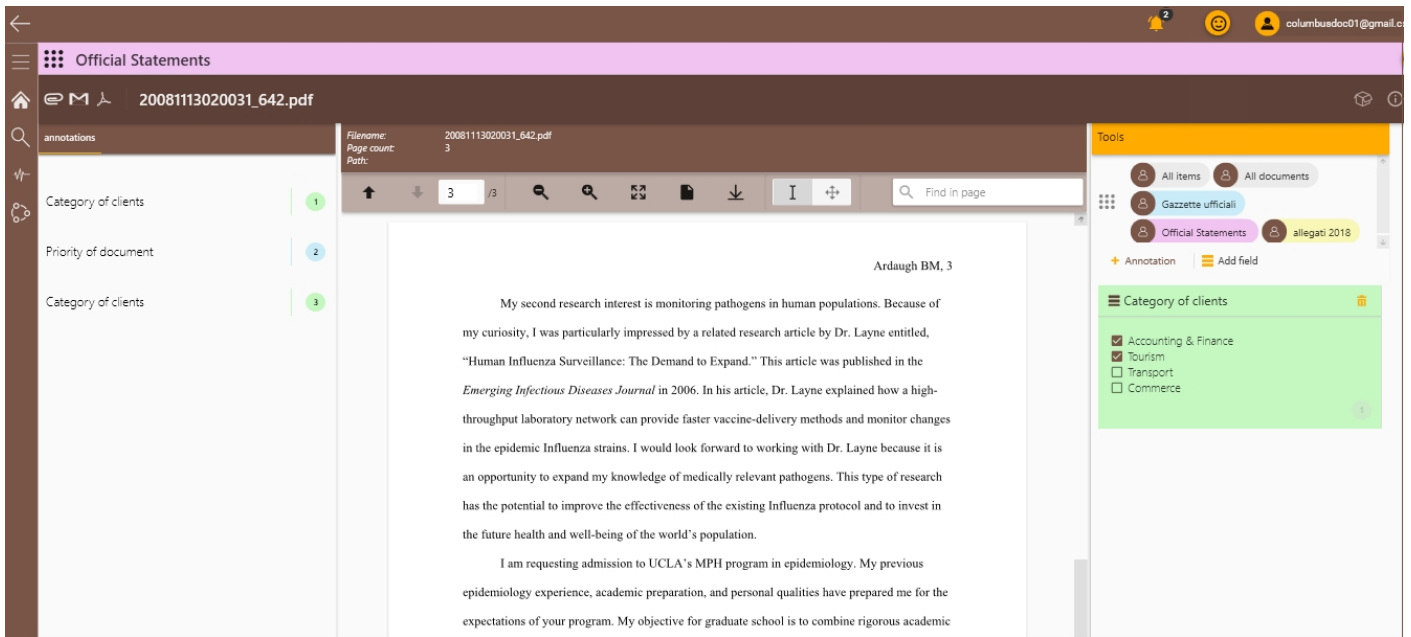
in the following example the type of *Custom Attribute* is **list of terms with multiple choice**;



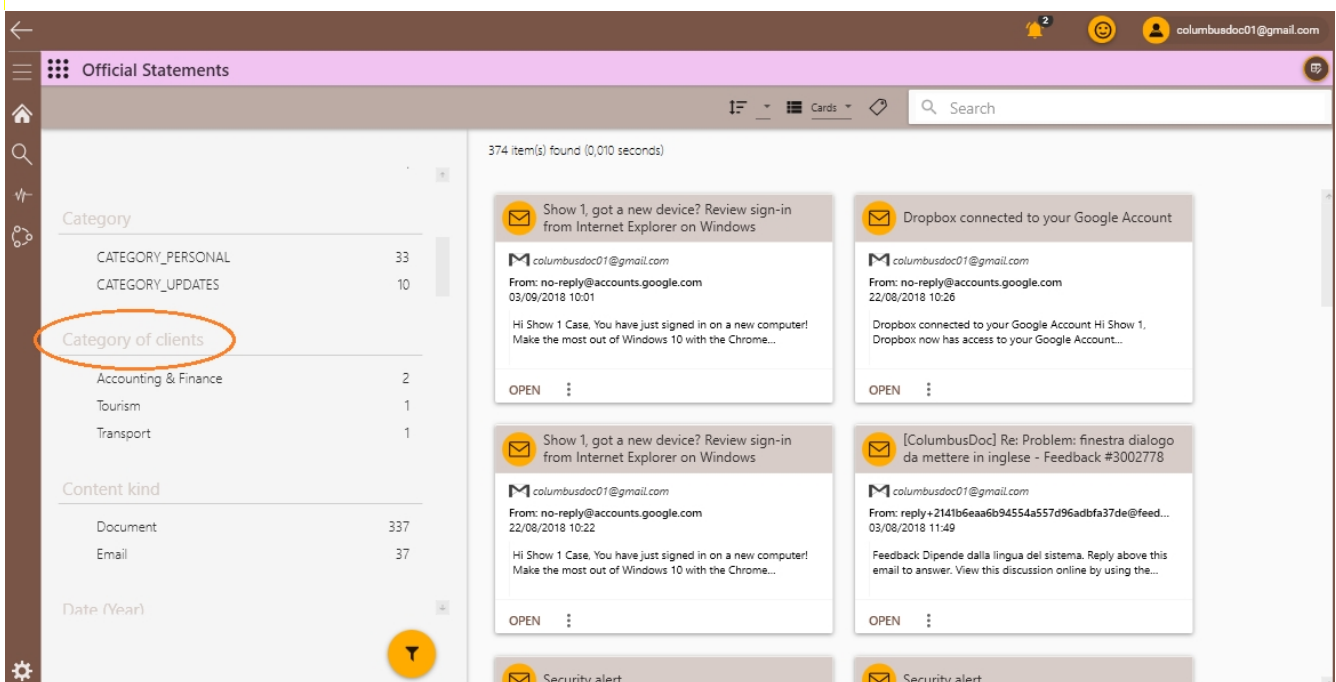
the user can add an attribute in one or more pages of the document by following the same procedure

The left **Annotations** panel is updated with the added attributes;

by clicking the number beside each attribute the system displays the selected page of the document and updates the right tools panel with any possible information added in the current page



The Custom Attributes added to a document are aimed to enrich it with further metadata; such metadata will be also available as categories in a search result to be used as filter.

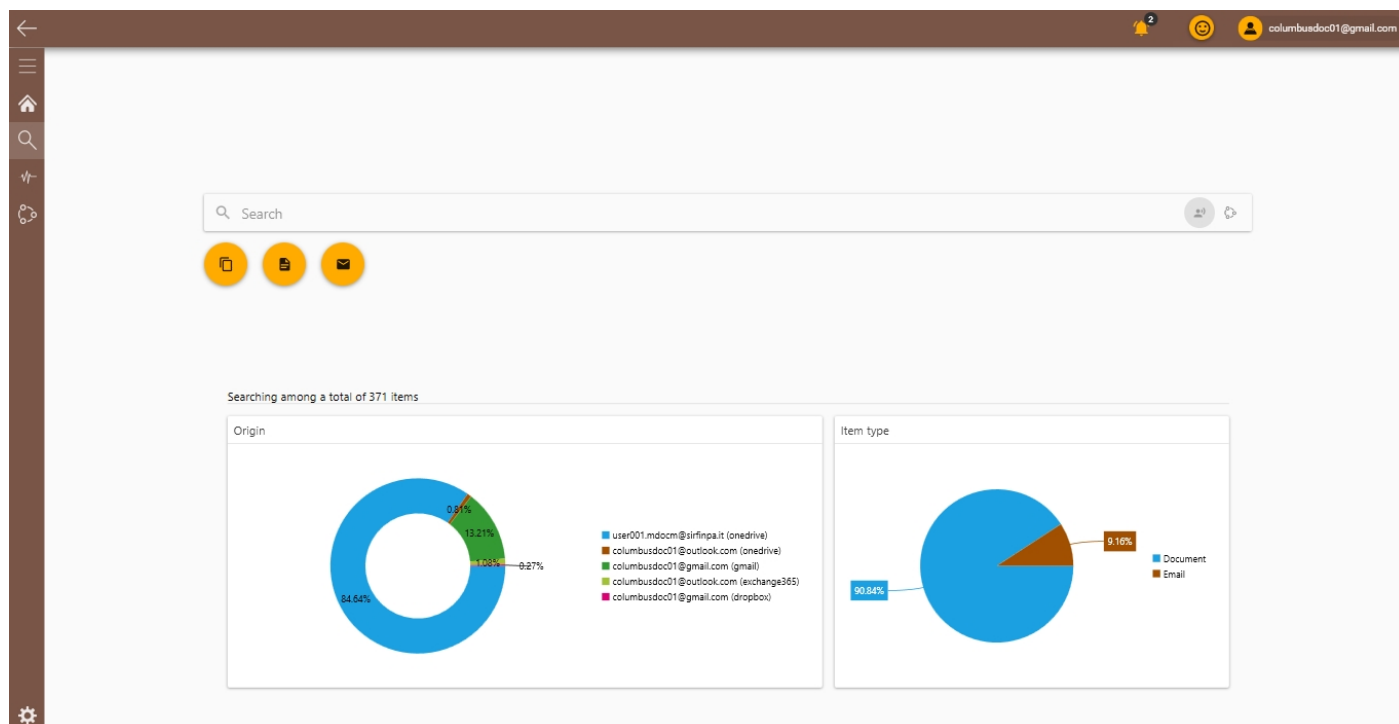


Advanced Search



The advanced search allows the user to set specific parameters before running the search in order to get already filtered results.

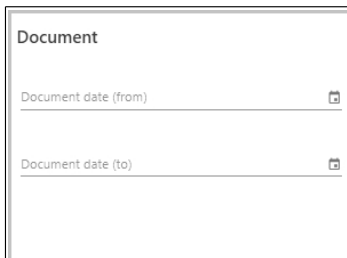

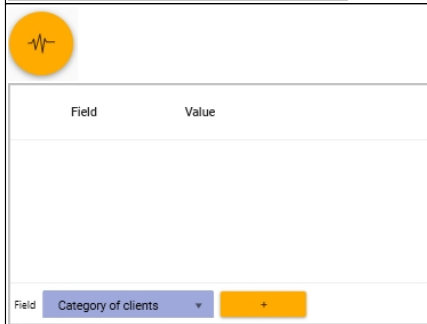
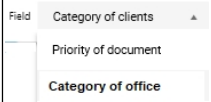

To access the advanced search the user can click this button  available in the left side menu.

The system displays two graphics: the one on the left shows data contained in the archive sorted by source, the one on the right shows the same data sorted by type of item.

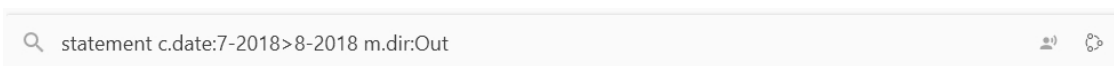


The search parameters can be set by using the following buttons:

 <div data-bbox="103 1265 438 1814"> <p>Content</p> <p>Item date (from) <input type="text"/></p> <p>Item date (to) <input type="text"/></p> <p>Item type <input type="text"/></p> <p>Title <input type="text"/></p> <p>Providers <input type="text"/></p> <p>Similar to <input type="text"/></p> <p>Original document identifier <input type="text"/></p> </div>	<p>To open the form containing the following search fields related to the <i>content</i>:</p> <ul style="list-style-type: none"> • Item date from/to: the user can click this button in both Item date fields <input type="text"/> and select a range of data from the calendar displayed; • Item type: click the down arrow and select an item from the dropdown list displayed (document/email) • Title: free text field • Providers: clicking the down arrow opens the dropdown list containing all the providers where the archive data come from; the user can select or deselect one or more provider by checking or unchecking the boxes (i.e. gmail/gdrive) • Similar to: free text field • Original document identifier: by clicking the button <input type="text"/> it's possible to browse the document of interest from any folder
	<p>To open the form containing the following fields related to the <i>document</i>:</p> <p>Document date from/to: the user can click this button in both Document date fields <input type="text"/> and select a range of data from the calendar displayed</p>

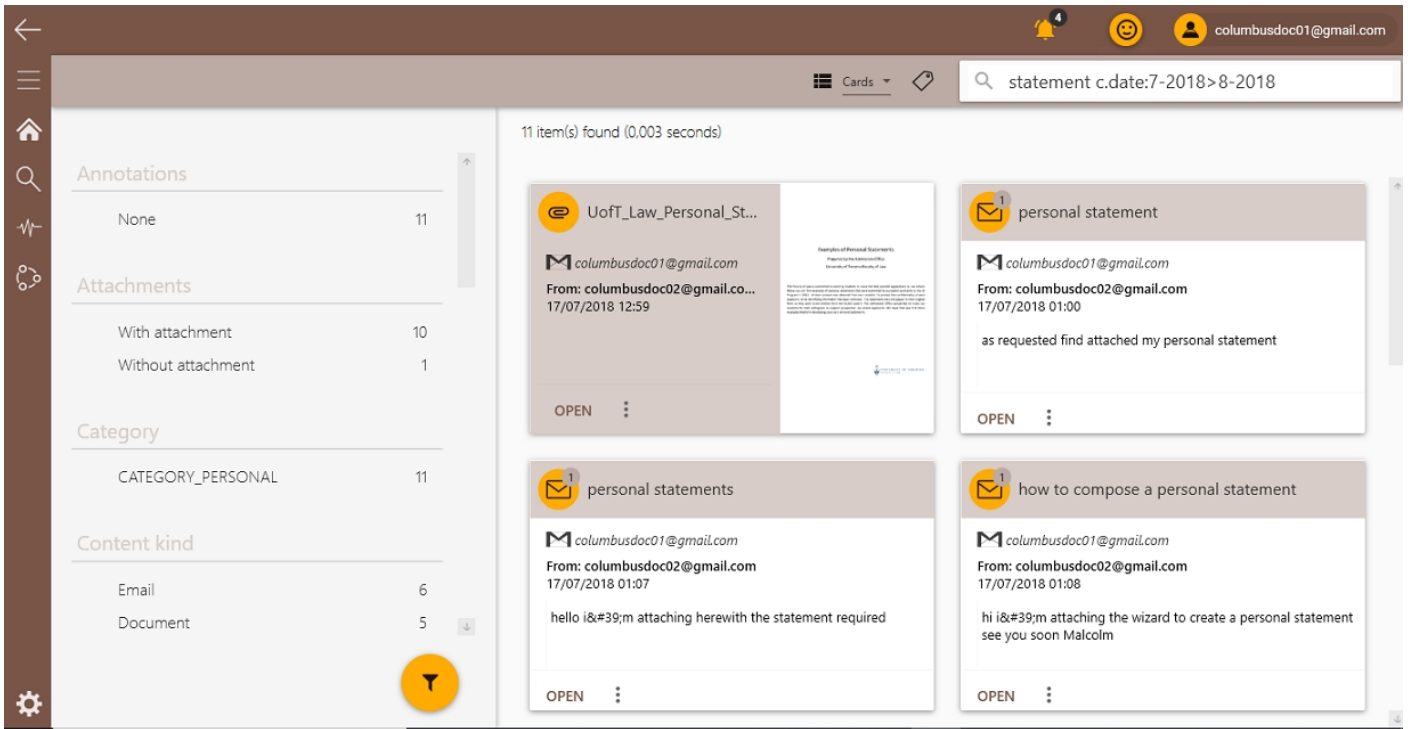
 <p>Document</p> <p>Document date (from) <input type="text"/></p> <p>Document date (to) <input type="text"/></p>	
 <p>Email</p> <p>Subject <input type="text"/></p> <p>Sender <input type="text"/></p> <p>Recipient <input type="text"/></p> <p><input checked="" type="checkbox"/> Has attachment?</p> <p>All Sent Received</p>	<p>To open the form containing the following search fields related the the <i>mail</i> of interest</p> <ul style="list-style-type: none"> • Subject: free text field to enter the subject of the mail • Sender: free text field to enter the sender (it s not required to enter the whole email address) • Recipient: free text field to enter the recipient (it s not required to enter the whole email address) • Has attachments: select the checkbox to include results of mails with attachment or deselect it to exclude them • mail type: the three buttons allow to set the search among all the mails, only the sent or the received ones.
 <p>Field Value</p> <p>Field Category of clients</p> <p>Field Category of clients</p>	<p>Opens a windows from where it's possible to select one or more custom attributes only if existing (see paragraph Custom Attributes)</p> <p>Clicking the down arrow beside the field will display the list of available attributes</p>  <p>Field Category of clients Priority of document Category of office</p> <p>After selecting an attribute click the  to include it into the column Field.</p> <p>From the column Value it's possible to select one or more values related to the attribute if such attribute is made up of a multiple choice.</p>

Each parameter set by the user through the above mentioned fields will be added in the search string beside the digitated text:




The user can start up the search by clicking search button 

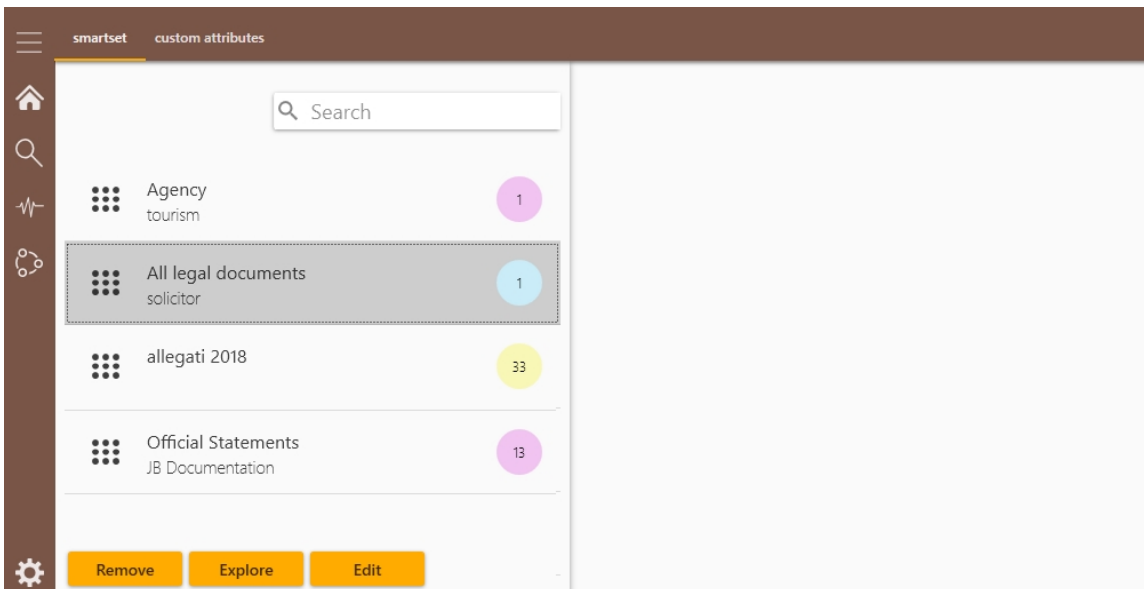
The Advanced search result screen is exactly the same as the Search result and enables the same actions. (See paragraph Search).



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Analysis

The **Analysis** section  displays the following screen containing two panels: *Smartset* and *Custom Attributes*

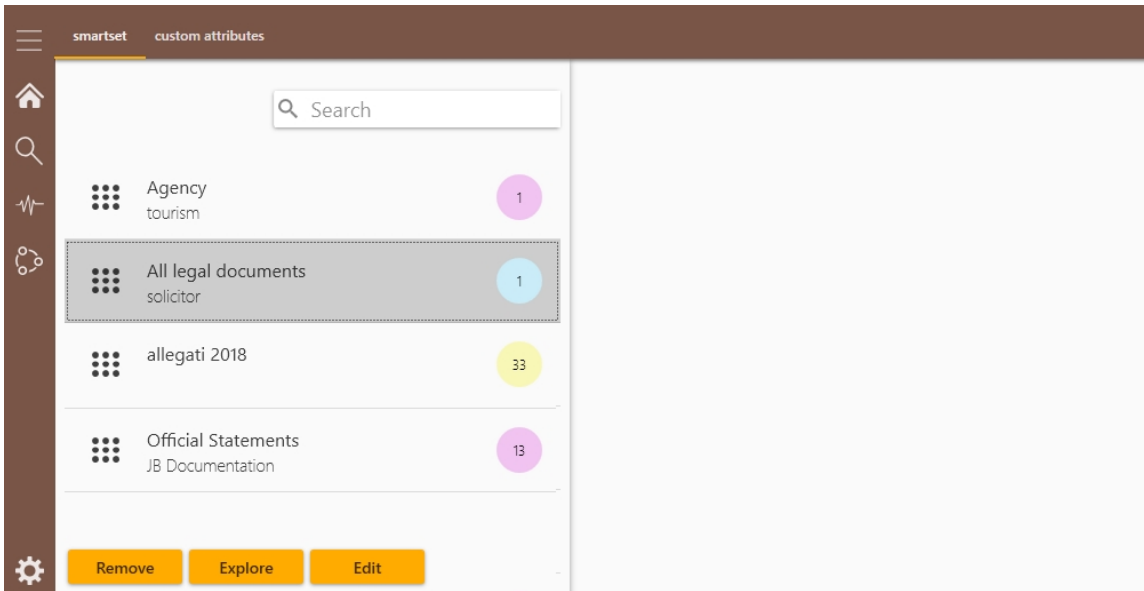


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Smartset


The Smartset panel is automatically displayed when opening the Analysis section.

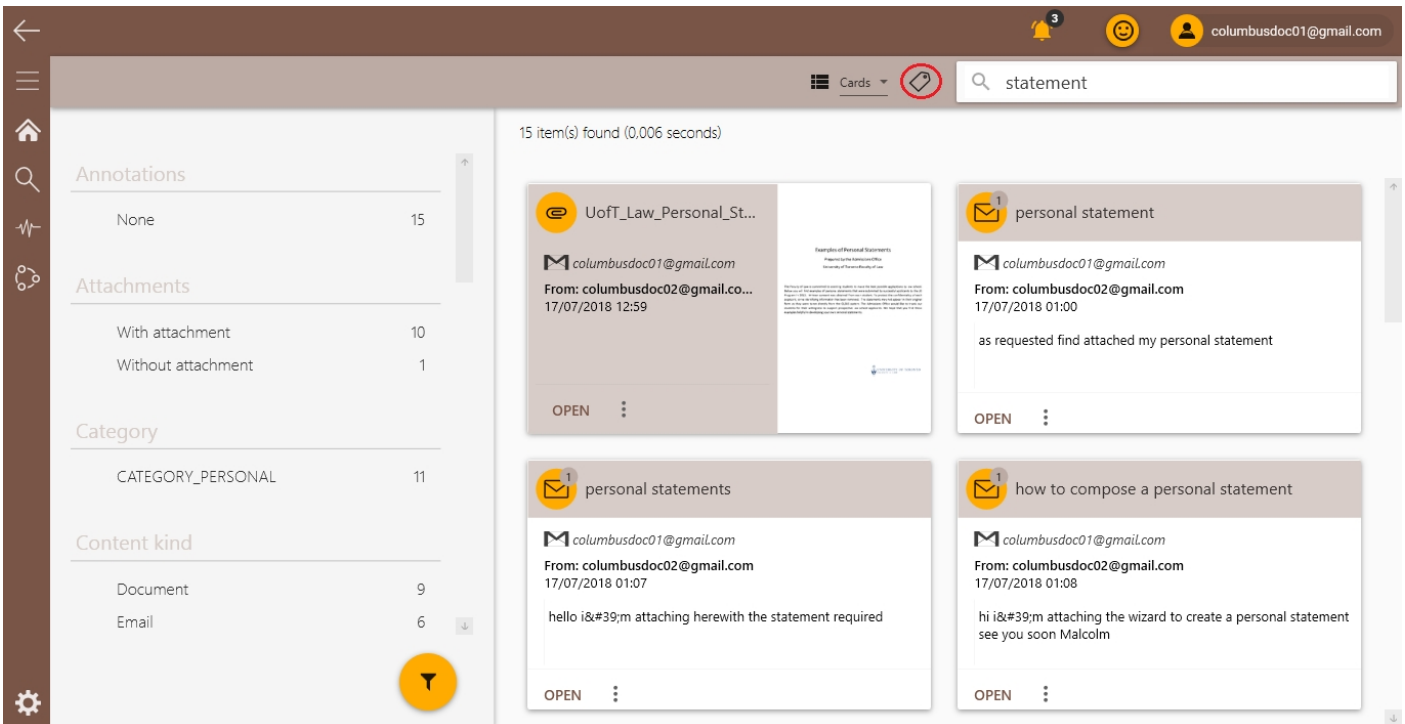
It contains all the Smartsets previously saved by the user



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Create Smartset

When setting one or more filter in a search result it's possible to save such filter in order to use it again for similar needs. On the top right side the function "Save current search as Smartset"  allows to save such filters:



After filtering a search result (see paragraph [Search > Manage a search result > Filter a result](#)) the user can click this icon  to display the new smartset form:

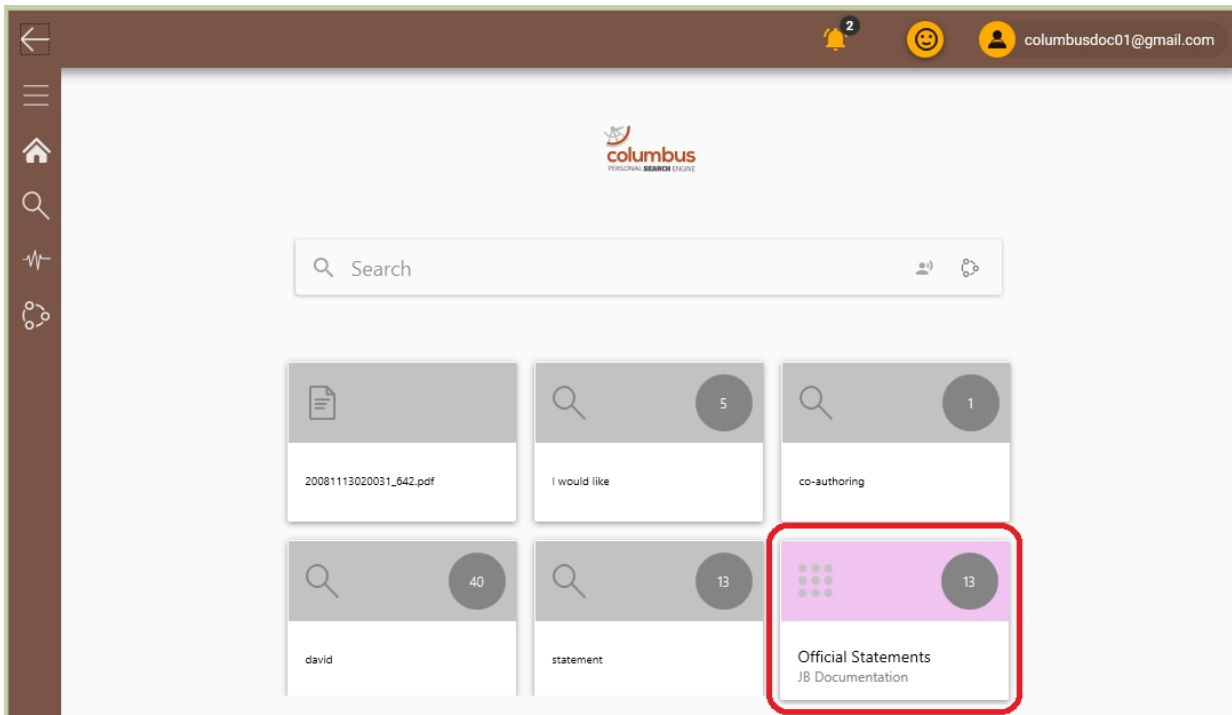
the form contains the following fields:

- **Name:** specify a name for the new smart set related to the set search filter
- **Category:** specify a subject related to the new smart set
- **Colour:** click the down arrow on the right and select a colour from the dropdown list

The following buttons are available:


Save	to save the smartset data (this button is visible only when at least one field is valued)
Cancel	to cancel data and go back to the previous screen

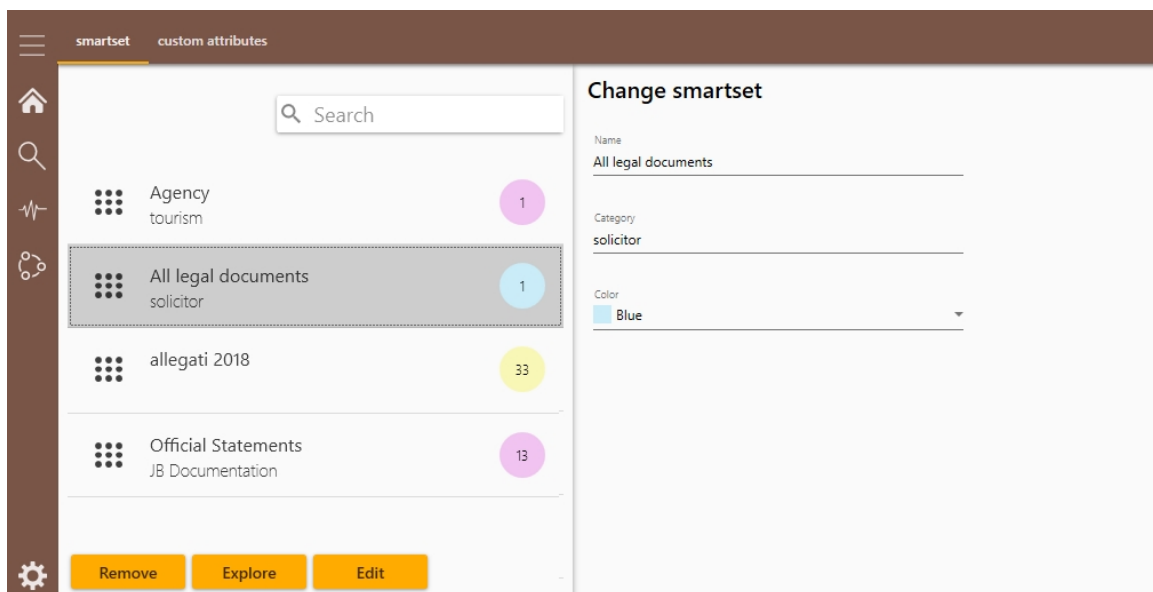
When the new smartset is saved it will be displayed in the section Analysis under the panel Smartset (see paragraph [Smartset](#)) as well as in the homepage as a specific tile among the other possible existing ones.



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Edit a Smart set

To edit a smartset the user can click the Analysis button  and display the list of all the smartsets previously saved; Once selected the smartset of interest from the list the system displays the edit form on the right



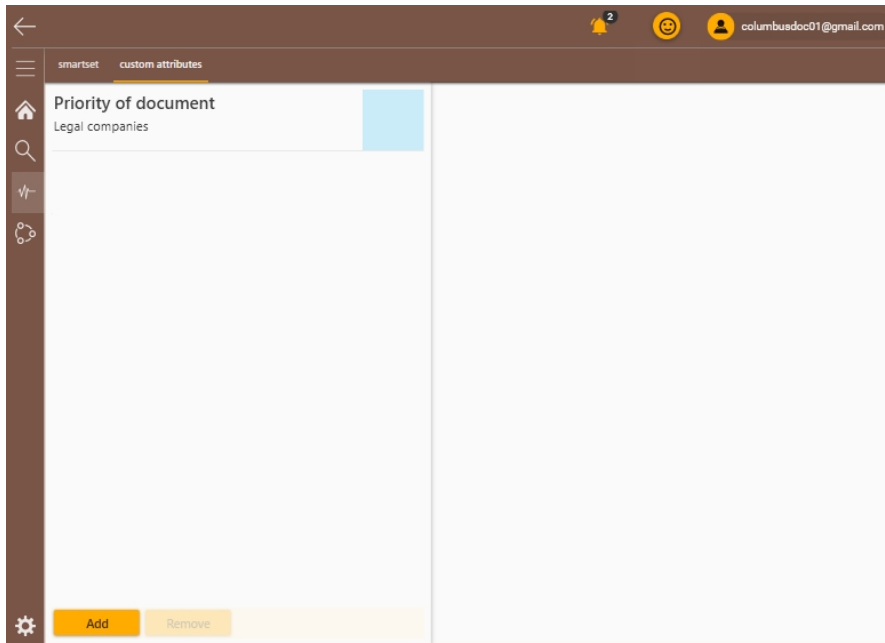
and the following button are enabled:

Remove	To remove the selected smartset;
Explore	To open and consult the search result related to the selected smartset;
Edit	To confirm the edit of the selected smartset

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Custom attributes

The panel **Custom Attributes** allows to create new attributes to be associated to the Smartsets in order to enrich the documents metadata belong to them; such metadata can be used as further filters in a search result.




to create a Custom Attribute click the button  and value the fields of the following form:

Edit custom attribute

Name

Type of custom attribute



- **Name:** specify a name for the attribute (e.g. Category of clients)
- **Type of custom attribute:** click the down arrow on the right to display and select a type of custom attribute from the following list: **(cambiare immagine con valore tradotto in inglese)**

Type of custom attribute

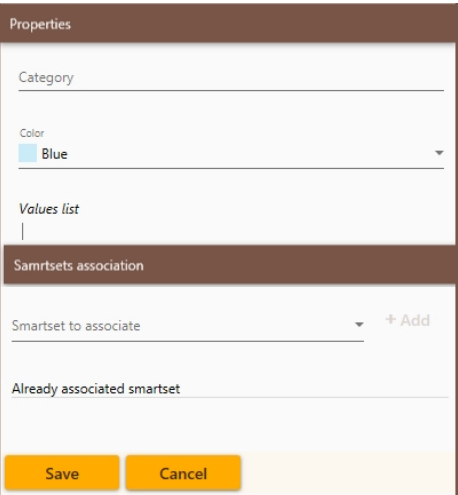


List of terms selected by user choosing from a list

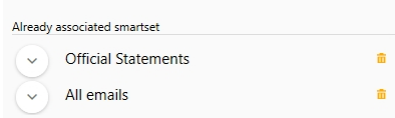
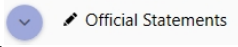

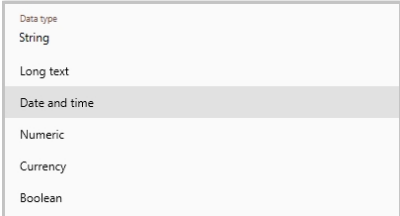
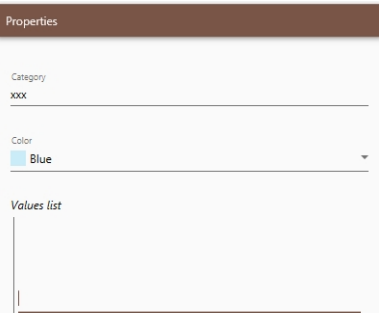
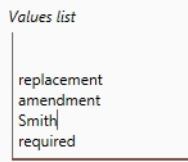
Unico valore selezionato dall'utente in base ad una lista


Single value not selected from a list

List of terms searched automatically

Depending on the *type of custom attribute* selected the system displays the following forms:

TYPE OF ATTRIBUTE FORM	FIELDS
<p style="text-align: center;">Multiple choice list</p> <p>The list of values created with this type of attribute will have a <u>multiple choice</u> allowed</p> 	<ul style="list-style-type: none"> • Category: specify the attribute category (e.g. Accounting documentation) • Colour: click the down arrow on the right to select a colour to associate to the attribute • Values list: enter a list of allowed values to be used for the custom attribute: <div data-bbox="938 1603 1187 1742" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Values list</p> <p>Accounting & Finance</p> <p>Tourism</p> <p>Transport</p> <p>Commerce</p> </div> • Smartset to associate: click the down arrow on the right to open the drop down list and select one or more smartsets to which associate the new custom attribute : <div data-bbox="922 1850 1206 2016" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>All items</p> <p>All documents</p> <p>Agency</p> <p>All legal documents</p> <p>Smartset to associate</p> </div> <p>After selecting a smartset click the button  to associate the attribute. The smartsets associated to the new attribute will be displayed in the list below and it's possible to remove one of them by clicking the button .</p>

	 <p>the user can enter a value list for a specific smartset by clicking the down arrow beside it; once the list is entered, the smartset will be displayed with a pencil beside to indicate it contains a customized and editable item list</p> 
<p>Single choice list</p> <p>The list of values created with this type of attribute will have a <u>single choice</u> allowed</p>	<p>The form fields of this type of Custom attribute are basically the same of the previous one.</p>
<p>Single value</p> <p>The custom attribute will have a single value to input</p> 	<ul style="list-style-type: none"> • Data type: it's possible to choose one of the following type of data to create the attribute: 
<p>Automatically searched terms</p> <p>The values of the list created with this type of attribute will be automatically searched (da verificare.....)</p> 	<ul style="list-style-type: none"> • Values list: it's possible to enter a list of values into this field which will be automatically searched when this attribute is associated to a document. (da verificare...) 

Once filled in the form, whichever type selected, the user can save the new attribute by clicking the  button

The saved *Custom attribute* is displayed on the left side list among all the other existing ones :

Category of clients Accounting documentation	
Priority of document Legal companies	
Add	Remove

Once created the *Custom attribute* will be available when displaying any document included in the smartset to which the attribute has been associated ([See paragraph Consult data > Annotations > Attribute](#))


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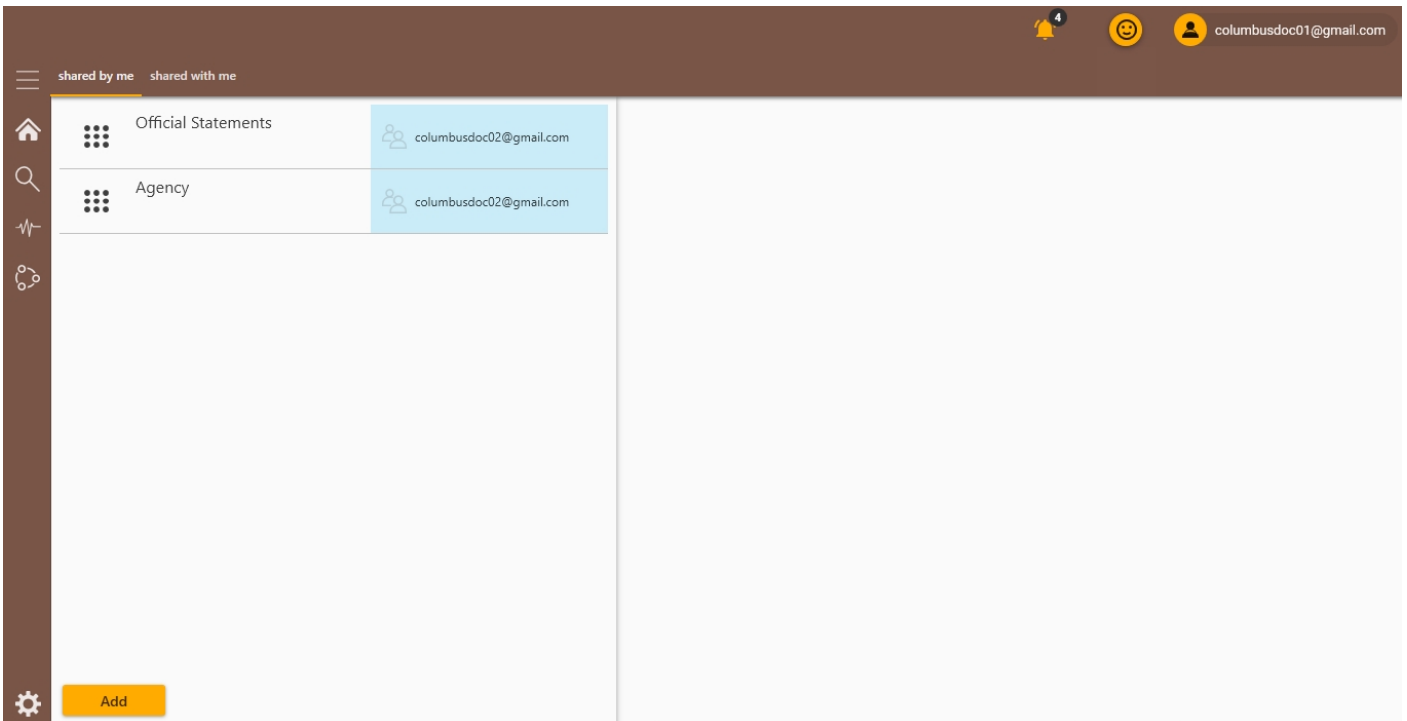
Sharing hub

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Share Smartset

It's possible to share a Smartset in order to make it visible to another user or to display a smartset shared by another user.

The user can click the button Sharing Hub  on the left side menu to open the following screen:



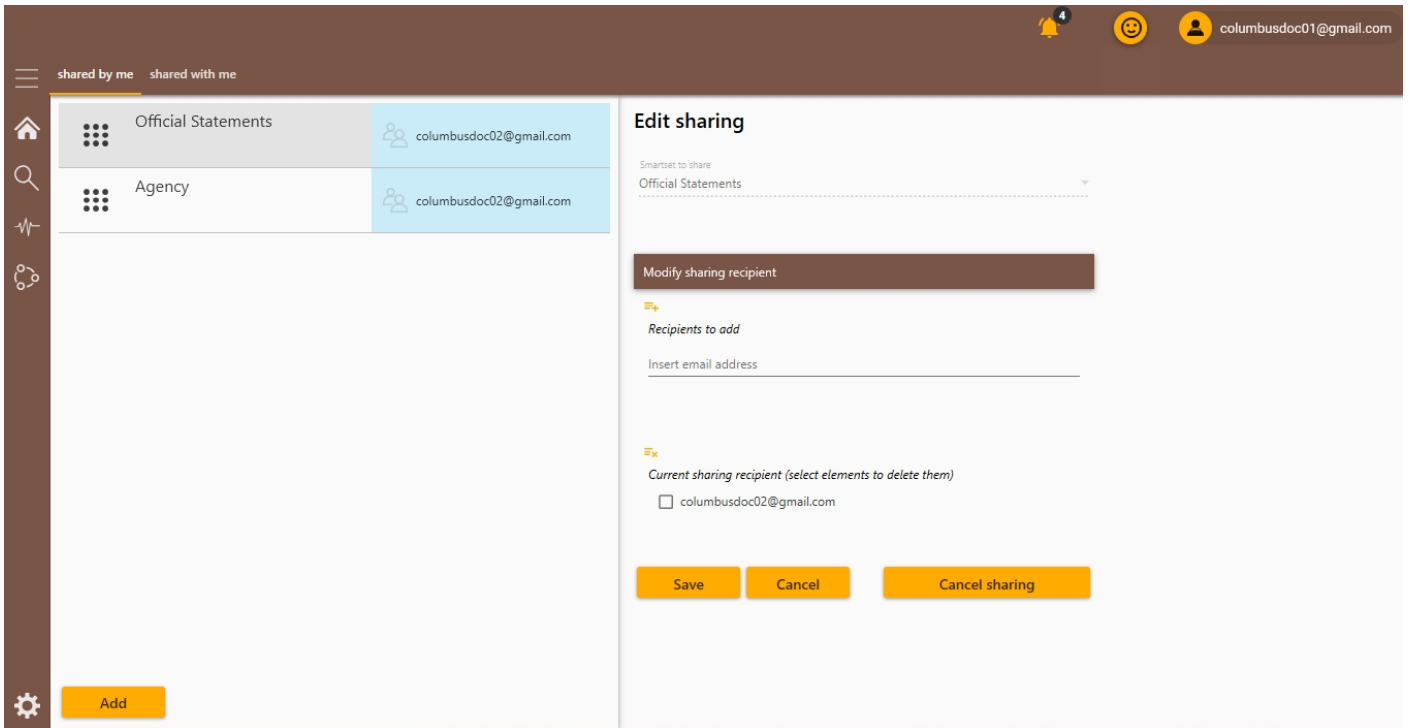
Two tabs are displayed on the top left side: *Shared by me* and *Shared with me*;

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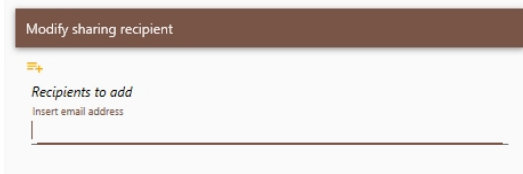
Shared by me

The tab "*Shared by me*" is already displayed when accessing the function Sharing Smartset. It contains the list of Smartsets shared by the user with other users.

When selecting a Smartset from the list the system displays the edit form of the shared smartset on the right side:



The user can add other recipients to the list of the already existing ones:



or remove one or more recipients:



the following buttons allows to :

Save	save the changes data (new or removed recipients)
Cancel	remove data from the edit form
Cancel sharing	remove the sharing of the selected Smartset

The system updates the Smartset list and displays the added or removed recipients in the blue box



or the canceled sharing in case of clicking the “Cancel sharing” button.

The panel “Shared by me” also allows to add a new sharing by clicking the button **Add** to display the new sharing form:

New sharing

Smartset to share ▾

Sharing recipients

➕

Recipients to add

Insert email address

Save Cancel

The user can click the down arrow related to the "smartset to share"

New sharing

Smartset to share ▾

to display the list of the saved smartsets where to select the one of interest and enter one or more recipients in the "Recipient" section

New sharing

Smartset to share ▾

Sharing recipients


➕

Recipients to add

Insert email address

columbusdoc02@gmail.com

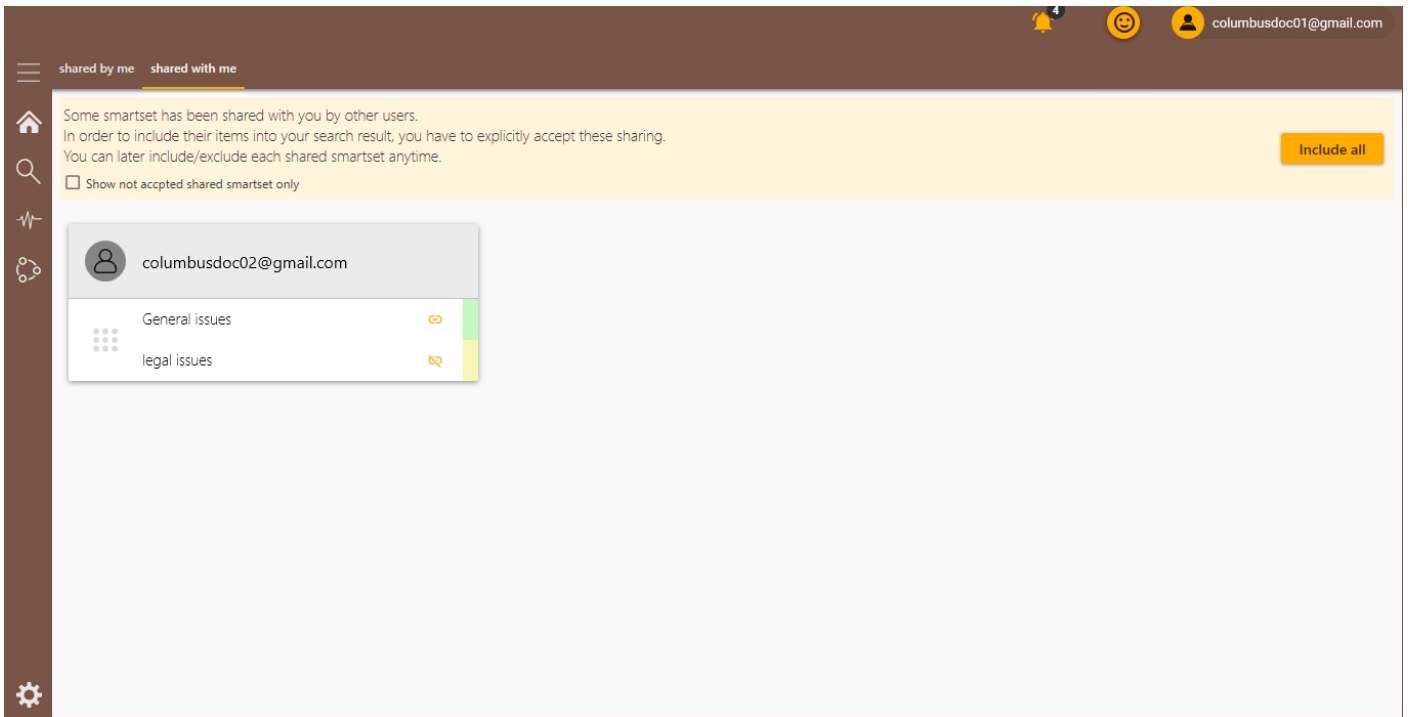
Save Cancel




Clicking the button  will add the new sharing in the list of smartsets.

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Shared with me

The tab *Shared with me* displays the following screen containing the smartsets shared with the user by other users:




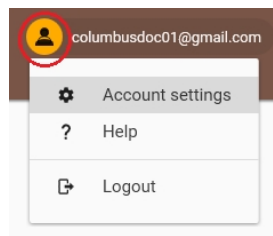
Clicking the “include” button  beside each smartset allows to include the smartset; once the smartset has been included it's possible to exclude it by clicking the “exclude” button . To include all the received smartset the user can click .


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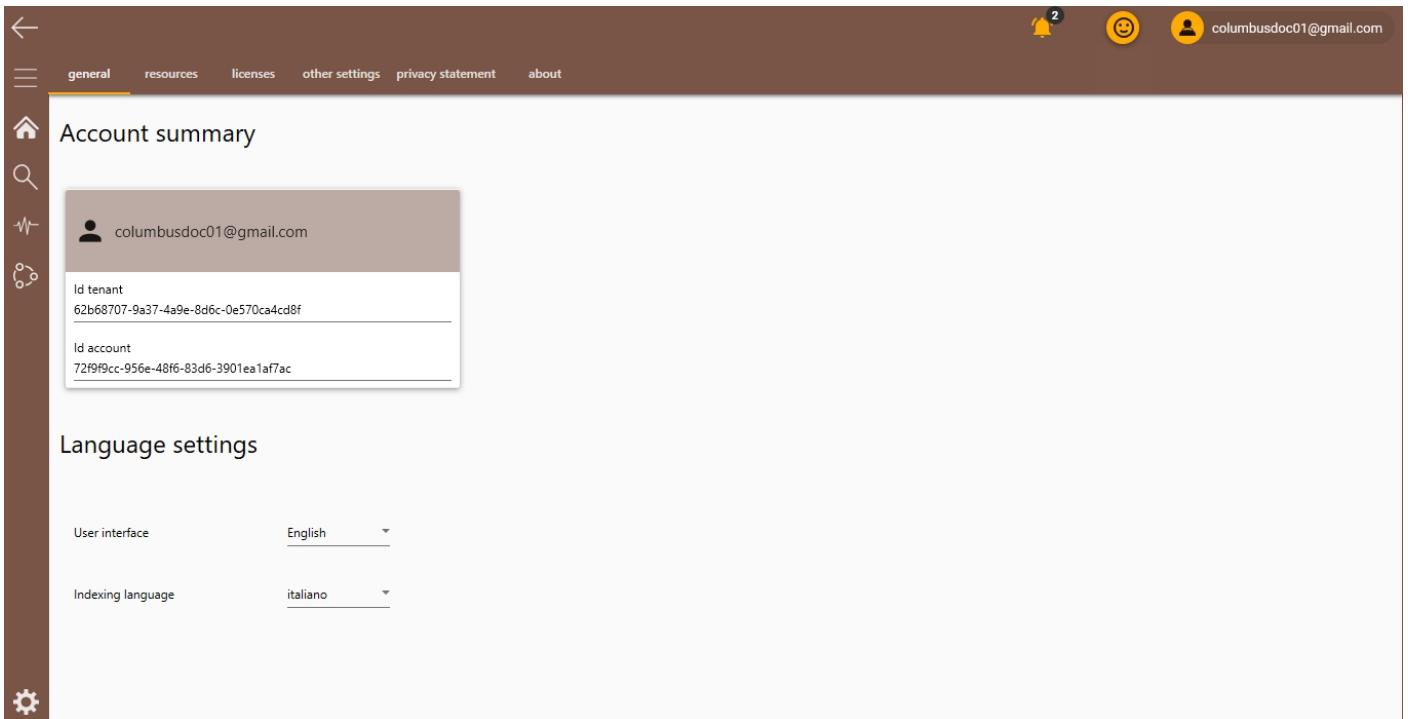
Account settings_general

The account settings allows the user to display and manage information related to the account such as indexed resources, registered licences, and other items.

To access the Account Setting click the button  on the left side menu or select the same button from the dropdown list of the following icon displayed on the top right side of the screen:

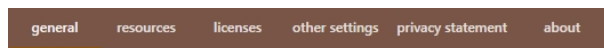


The system opens the following screen and displays the first tab .



In this tab it's possible to consult the **Account summary** with tenant and account details, as well as the **Language setting** where it's possible to set the user interface and the indexing language.

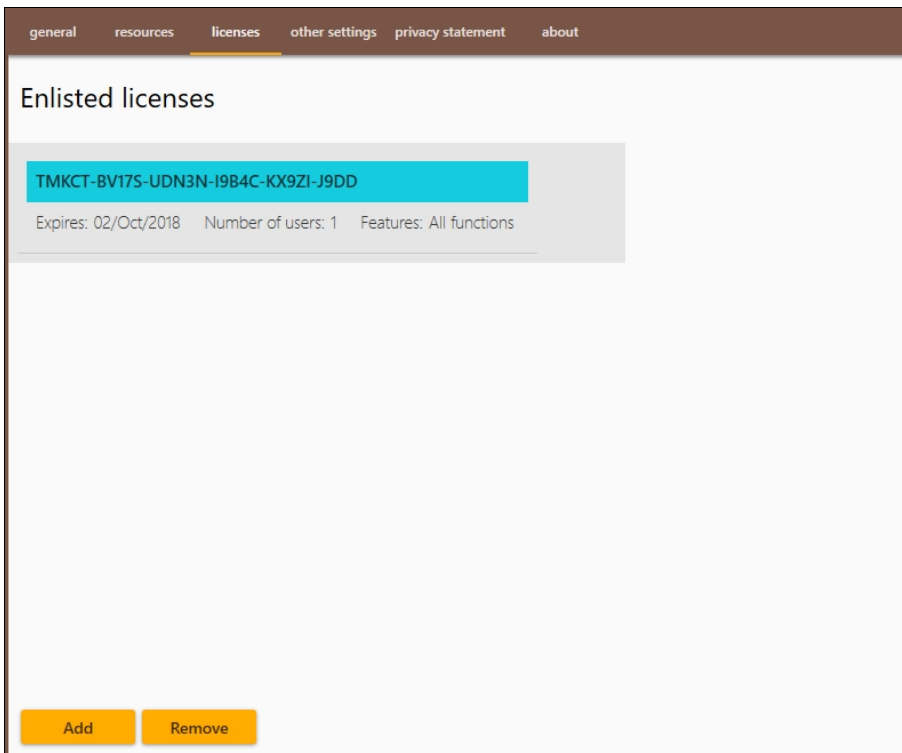
The top bar displays the following tabs:



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Licences

The tab **licenses** displays the following screen including details of the registered licence and a possible list of licences if existing .



on the bottom the following actions are available:



Remove	to remove a licence (<i>enabled only after selecting a licence from the list</i>)
---------------	---

After clicking the button **Add** the system displays the following dialogue window to enter a new licence:

Insert license key

Only upper-case chars and number allowed

License key

Ok Annulla

After entering the licence key the user can confirm by clicking OK

The user can click the button **Remove** to display the following dialogue window and confirm to remove the selected licence:

License management

Remove license with key TMKCT-BV17S-UDN3N-9B4C-KX9ZLJ9DD?

NO YES

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Resources

Clicking the tab **resources** displays the following screen showing the list of the indexed resources:

The screenshot shows the 'resources' tab with a search bar and a list of indexed resources. The resources listed are:

- gdrive (columbusdoc01@gmail.com)
- gmail (columbusdoc01@gmail.com)
- dropbox (columbusdoc01@gmail.com)
- onedrive (user001.mdocm@sirfinpa.it)

Summary statistics on the right:

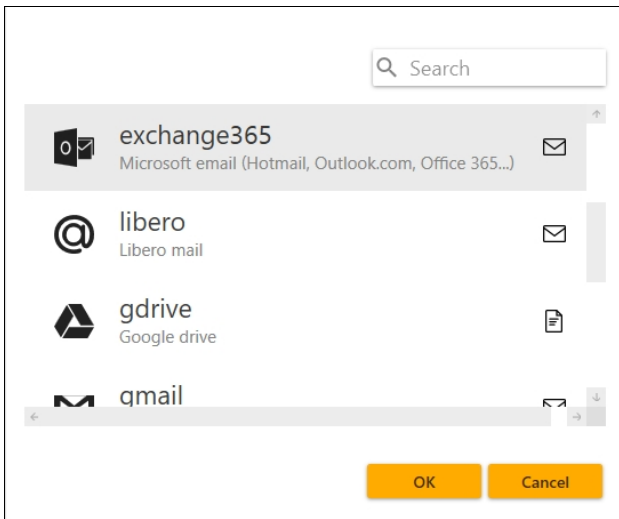
- Indexed items count: 72**
 - Indexing scheduled: 6
 - Indexed: 47
 - Excluded by user or system filters: 19
- Indexed item size: 9.66 MB**
 - gdrive (columbusdoc01): 0 MB
 - gmail (columbusdoc01): 8.52 MB

At the bottom left, there are buttons for 'Add', 'Remove', and 'Configure'.

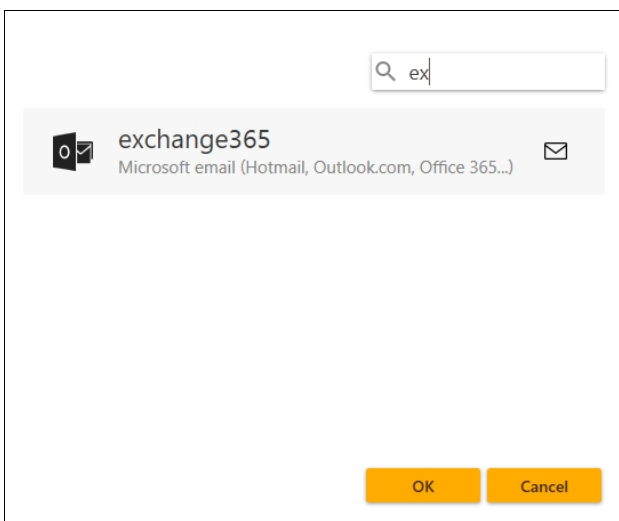
on the bottom left side the system displays the following commands:

Add	to add a new resource
Remove	to remove a resource selected from the list (<i>enabled only after selecting an item</i>)
Configure	to change the setting of a resource previously added (<i>enabled only after selecting an item</i>)

After clicking the button **Add** the following box is displayed to select the resource to add

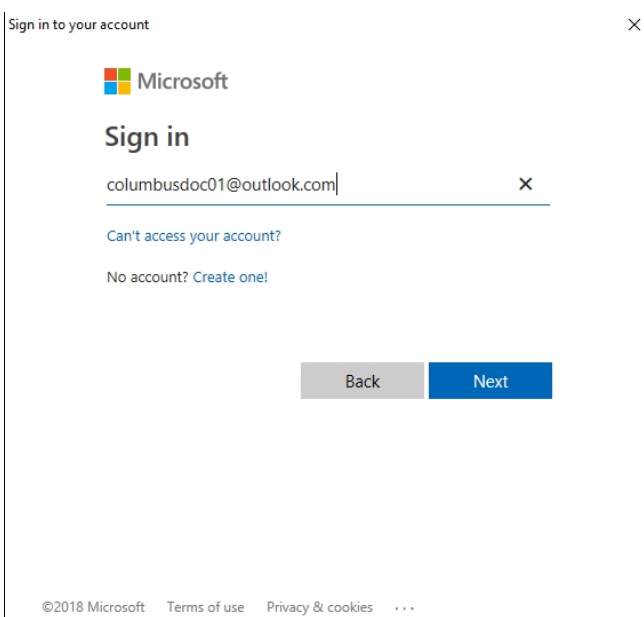


it's possible to filter the list by digiting one or more characters or the whole name of the resource in the search string on the top right side

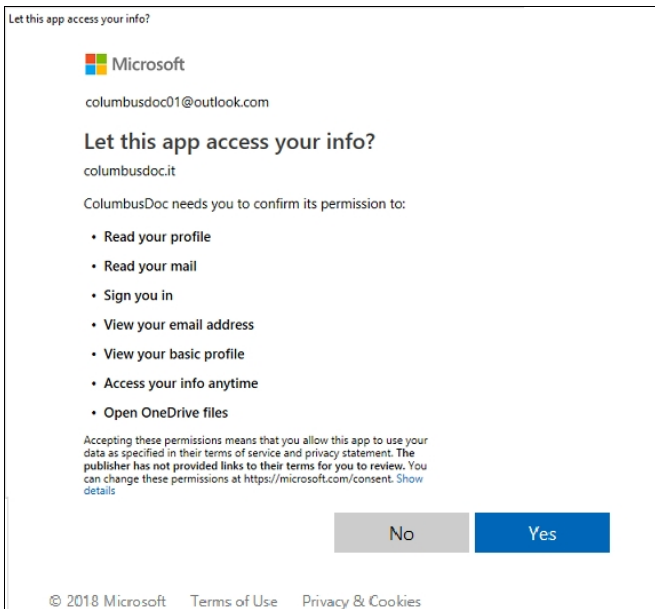


After selecting the resource of interest click the button **Ok** to confirm the operation;

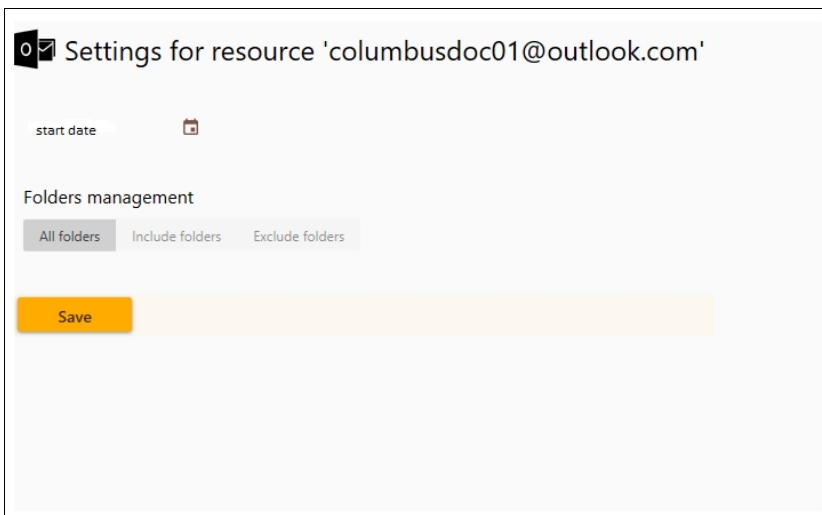
the following dialogue window is displayed to enter credentials and access the selected resource:



followed by the window to confirm the following authorizations:

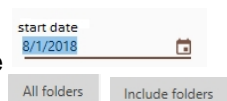


After confirming such authorizations by clicking OK the new resource is added and the following box is displayed to manage the folders:



It's possible to set a start date of the folders management through the calendar on the top left side and decide if federate all the folders, or only include or exclude some of them through the buttons

Exclude folders

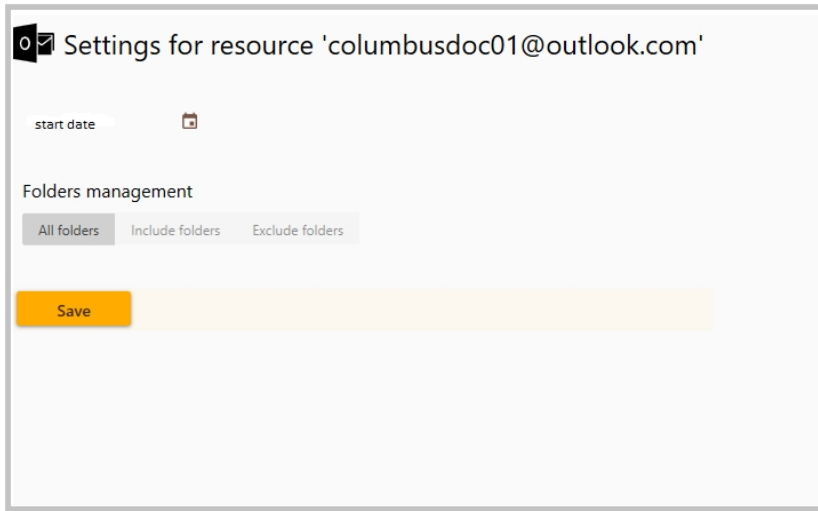


After selecting the folders to include or exclude click the button **Save** to confirm the setting.

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configure resources

When clicking the **Configure** button, the system displays the setting box where it's possible to change the setting of the selected resource:

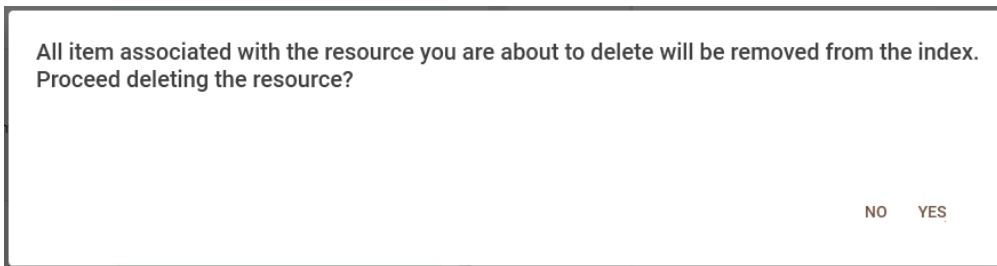


the setting fields are exactly the same of the initial setting when adding a new resource (see Add command in paragraph Resources)

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remove resources

When clicking the **Remove** button, after selecting a resource from the list, the system displays the following dialogue box to confirm the action:

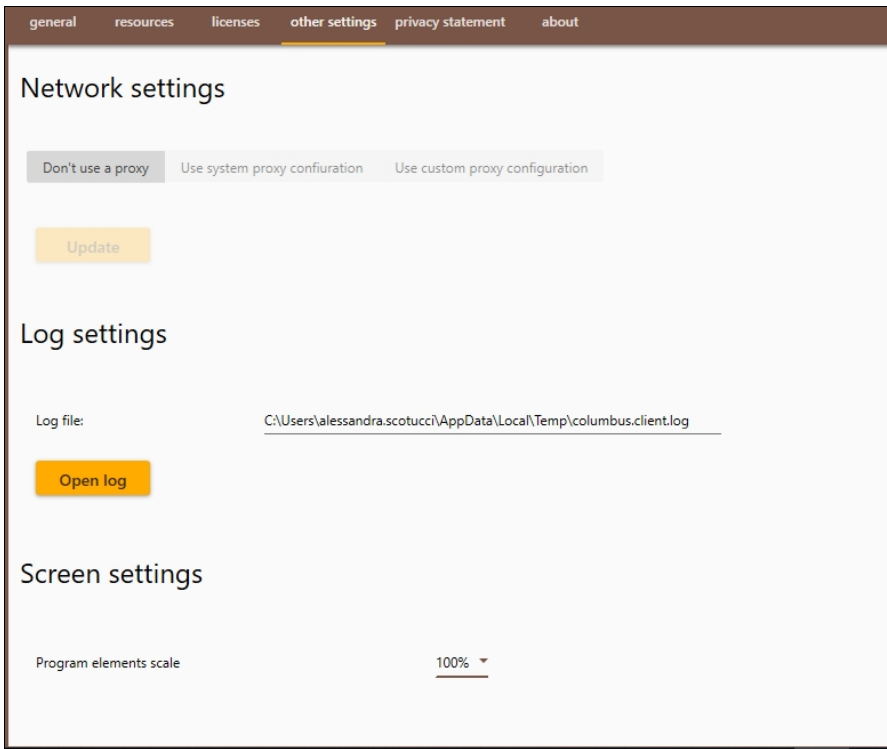


After confirming by clicking YES the resource will be removed from the list.

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Other settings


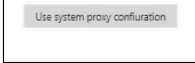

Clicking the tab **other settings** displays the following screen which allows to manage Network, Log and Screen settings



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
Network settings

The *network settings* include the following options:

	the user can select this option to use no proxy and confirm by clicking the Update button
	the user can select this option to use the system proxy configuration and confirm by clicking the Update button
	the user can select this option to use a specific proxy configuration, enter the proxy details through the following form and confirm by clicking the Update button

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Log settings

The *Log settings* allows to open the log file by clicking the specific button  and display the following details:

```
columbus.client.log - Notepad
File Edit Format View Help
2018-07-31 14:21:47,119 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:21:47,147 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:21:47,151 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:33:59,372 [32] WARN MAK.Shared.Core.Infrastructure.Logging.Log4NetAdapter - Cannot reac
2018-07-31 14:34:54,534 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:34:54,561 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:34:54,564 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:40:48,601 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:40:48,627 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:40:48,631 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:45:00,845 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:45:00,871 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 14:45:00,875 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:56:07,209 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:56:07,235 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:56:07,239 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:58:43,377 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:58:43,404 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-07-31 15:58:43,407 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-08-01 09:56:56,476 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-08-01 09:56:56,506 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-08-01 09:56:56,510 [1] INFO MAK.Shared.Core.Infrastructure.Logging.Log4NetUtils+LoggingLevelComp
2018-08-01 11:52:10,409 [29] WARN MAK.Shared.Core.Infrastructure.Logging.Log4NetAdapter - Cannot reac
2018-08-01 11:52:25,415 [5] WARN MAK.Shared.Core.Infrastructure.Logging.Log4NetAdapter - Cannot reach
```

X

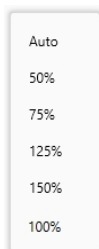
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Screen settings

The *Screen settings* allows to set the screen resolution



by clicking the down arrow it's possible to select a percentage from the dropdown list:



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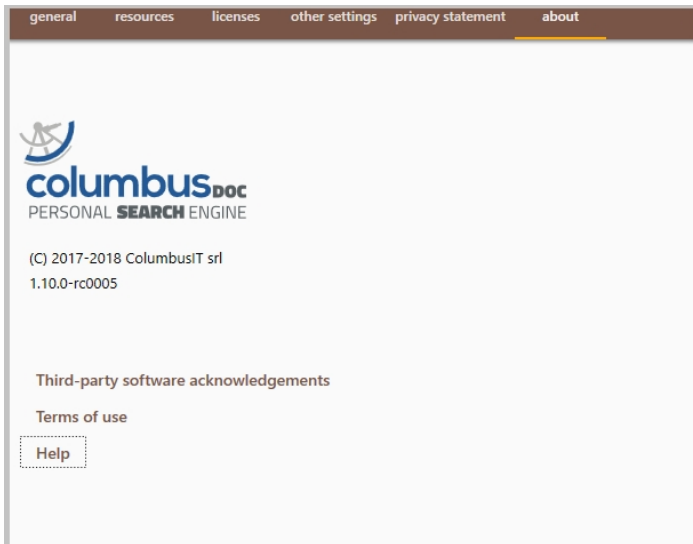
Privacy statement

Clicking the **privacy statement** tab opens the link to Columbus privacy policy statement.

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About

the tab **about** displays the following screen where it's possible to consult Third-party software acknowledgements, Terms of use and Help





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Feedback


The Feedback icon,  available from the top bar of the homepage, allows to send a feedback (problem or a suggestion) to the support team.

The user can move the mouse over such icon to display the following options:

	send feedback
	start up the recording session

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Send feedback

To send a feedback to the support team the user can select this icon  to display the User feedback form with the following fields:

User feedback

Problem Suggestion

User name
columbusdoc01@gmail.com

Email address
columbusdoc01@gmail.com

Subject

Message

Send recorded session Check content





- **Problem/Suggestion**: depending on what kind of feedback;
- **User name**: automatically valued by the system;
- **Email address**: automatically valued by the system;
- **Subject**: enter the subject of the problem/suggestion
- **Message**: description of the problem/suggestion
- **select recorded section**: check this box to attach a recorded session (this field is visible only when a session has been previously recorded)

on the bottom the following actions are available:

Send	to send the feedback after completing the form
Cancel	to close the form without sending the message and go back to the previous screen

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Start session recording

To record a session of work (useful to capture an error or any other matter) the user can click this icon  :
 the feedback icon starts rotating  to show the system is recording the session;
 to stop recording the user can click this button  ;
 the following button  is now enabled to open and see the session recorded.

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