Understanding User Interface

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Overview

The Ideolve interface is made up of three panes.

1. **The Application Bar**
2. **The List view**
3. **The Note view**

Application Bar

On the left of the screen is the Application Bar.

1. The options on the Application Bar allow you to switch between the different applications. The applications,

Home, Search, Workspaces, Files, and Pinned Notes allow you to classify and browse through the content. The collaboration applications **Notifications, Mentions, and People** help you to collaborate. Applications such as **My Space, My Activity and Recently Opened** are useful to improve your productivity.

2. On the top of the Application bar is your profile image. **Clicking the Profile image opens a menu** from where you can do the following:
   a. **Manage Workspaces**
   b. Define **Organization Controls** to prevent data leaks
   c. **Configure connectors to external applications**
   d. Update your **Settings**.
   e. Some other useful options accessible are the **Quick Tour**, a link to the **Online Help**, get a list of the **updates**, and a form to give **Feedback**.
   f. The **Logout** option is also accessible from this menu.

List view

The middle pane shows the list of selected notes. Depending on the application selected, the list view contents will change.

Search

1. Selecting the **Search** application allows you to search through the notes.
2. On launching the application, the last search query and its results will be shown.
3. On top of the pane is the **edit box where you can enter your search query**.
4. You can search for **notes by author** by entering the "**@**" key and **selecting an author** from the list.
5. To **search for tagged notes**, enter "**#**" and **select a tag** from the list.
6. You can even enter **keywords or phrases.** Phrases have to be enclosed in double-quotes.
7. You can specify more than one search criterion.
8. The default sort order for a search for keywords is by relevance.
9. The default order for a search for tags or authors is by date. You can change the sort order by clicking on the **respective sort icon**.
10. To **clear a search**, **click on x icon.**
11. If there are new notes available or any notes/comments have been updated since the last refresh, you will see the "**New Updates**" link on top. Click on the link to update the note list.

Home

1. Selecting **Home** in the Application Bar will show the list of **Notes recently updated**, with the latest note on the top.
2. On top of the list is the **workspace filter.** You can filter the notes by workspace by selecting a workspace from the list.
3. If there are new notes available or any notes/comments have been updated since the last refresh, you will

see the "**New Updates**" link on top. Click on the link to update the note list.

Workspaces

Files

1. The **Files** application helps you quickly locate files stored.
2. On the top of the application is a filter, where you can
   1. **Select the workspace to search through**. The default setting is to list files from all workspaces.
   2. **Select the sort order**. The default sort order is Newer, which lists the latest files on top.
   3. **Search for the given text in the file name**.
   4. The **Advanced Filter Applied** options allow you to f**ilter by the file type and the author of the file**.
3. On pressing enter or clicking on the search icon, the results will be shown
4. The results are organized such that all files associated with a note are displayed together.
5. To load more results, click on the **Load more** link at the bottom of the search results.

Notifications

1. The **notifications** list view will have the list of changes to all the notes you have created or that are shared with you.
2. The latest notification will be at the top of the list.
3. Each notification has the following:
   a. **The author**
   b. **The action taken**
   c. **The Note title**
   d. **The workspace to which the note belongs**
4. Clicking on the notification will open the note in the detail view.
5. New notifications will be highlighted in blue.
6. To filter the list, you can select one of the following options from the drop-down list at the top of the pane:
   1. **All:** This is the default option and will show all the updates
   2. **Attachments:** Choosing this option will show all updates to the attachments on any note or comment
   3. **Notes:** Choosing this option will show all updates to any note content
   4. **Comments:** Choosing this option will show all updates to any comments
   5. **Roles:** Choosing this option will show all updates to note roles.
7. To further narrow down the notification list, you can cl**ick on the icon on the right side**. In the **pop-up,** you can select the **workspace, the author, and the content**.
8. To see only the unread notifications, click on the **Unread** tab.

Mentions

1. The list of all notes or comments where you have been **addressed/mentioned or tapped** will be listed.

2. The latest mention will be at the top of the list.
3. Each mention will have :
   a. **The author**
   b. **The action (mentioned/ tapped/replied)**
   c. **The Note title**
   d. **The Workspace to which the note belongs**
4. New mentions will be highlighted in blue.
5. To remove the highlight,
   a. Navigate to the note by clicking on the mention
   b. Read & click the comment/note.
6. To filter the list, you can select one of the following options from the drop-down list at the top of the pane:
   1. **All:** This is the default option and will show all the mentions
   2. **Mentions:** Choosing this option will show all the notes and comments where you have been mentioned.
   3. **Taps:** Choosing this option will show all notes and comments which have been tapped for your attention
   4. **Replies:** Choosing this option will show all notes or comments which are replies to your mentions
7. To further narrow down the mentions list, you can click on the icon on the right side. In the pop-up, you can select the type of **mention, the author, and the workspace.**
8. To see only the unread mentions, click on the **Unread** tab.

Tags

1. The tag list shows all your **private tags** as well as all the **shared tags**.
2. To view your private tags, select the **Private Tags option** in the list at the top of the pane.
   1. The private tags are organized into three views:
      1. The most **recently** used tags
      2. The most **popular** tags
      3. **All** tags (Sorted alphabetically in ascending order). To **search for a private tag**, type the text in the edit box on top of the pane. All tags having the text will be listed.
   2. The **tabs** (Recent / Popular / A-Z) on the top of the Tag list allow you to switch between the views.
   3. You can **rename or delete a private tag**.
3. To view all the shared tags, select the **Shared Tags**. To **search for a shared tag**, type the text in the edit box on top of the pane. All shared tags having the text will be listed.
4. Clicking on a private or shared tag will launch the Search application with a qeury to search for all notes tagged with the selected tag.

MySpace

1. **MySpace** is your personal workspace on Ideolve.
2. By default, all the notes that you have created are only visible to you in MySpace.
3. To share a note, you first have to move it to a common workspace and then share the note.

Pinned Notes

1. This application lists all the notes **pinned** by you.
2. You can pin any number of notes across workspaces.
3. To un-pin a note, click on the pin icon next to it.

Recently Opened

1. The **Recently Opened** application will list the top fifteen most recently opened notes.
2. The note opened last is on the top of the list.

My Activities

1. The **My Activities** application lists all the operations done by you.
2. These are classified in the following sections:
    1. **Note Edits:** The latest notes edited or created by you
    2. **Shares:** The latest notes shared by you
    3. **Comments:** The latest comments added or edited by you
    4. **Mentions:** The latest mentions added by you
    5. **Replies:** The latest replies given by you
    6. **Taps:** The latest notes/comments tapped by you.
3. Each section has a list of notes affected and the action. **Clicking on the icon** next to the note will open the note.
4. You can **filter** the activities using one of the **pre-defined time ranges**. Available options are Last 7/15/30/60 days
5. The **last update time** is also displayed in the top right corner. To refresh the list, click on the **Refresh icon** next to it.

People

1. The people tab helps you quickly navigate through the list of authors of all notes shared with you.
2. The People list is organized in two sections, **Favorites** and **All**.
3. The people added to the **Favorite list are visible on the Application Bar** and clicking on a name will launch the Search application with a search for all notes and comments authored by the person.
4. To **search through a name in the 'All' list**, start typing in the edit box on top. All names containing the text entered will be displayed.
5. To mark a name as a favorite, click on the ***** next to the name.

Note View

An Ideolve Note view consists of

1. **Open Note selector**
2. **Note header**
3. **Note Pane**
4. **Comments Pane**
5. **Files Pane**
6. **Links Pane**
7. **Tagged Comments Pane**

Open Note selector

1. On the top of the Note View is the **Open Note selecto**r which lists the last **5 open notes**.
2. Every note opened is added to the left of the list, removing the rightmost note from the list
3. Clicking on the note will show the contents of the note
4. A red dot on the note name indicates the note has content that is unread.

Note Header

1. Below the Open Note Selector is the **Note Header**. The Note header is fixed at the top of the detail view and will not move even as you scroll through the note content and comments.
2. At the top of the header, you will see the **Note Title.** The note owner can update the title, and it will reflect in the note header and other views. Note title shows
    a. **The author of the note**
    b. **The workspace to which it belongs**
    c. **The date and time of the last update to the note**
3. At the right of the note title,
    a. If the note is shared with other users, then a **shared user icon** will be shown. Clicking on the icon will show the list of users with whom the note is shared. You can add new users to the list.
    b. If the note has been published, then a **publicly available icon** will be shown. Clicking the icon will show a link to the note.
    c. **The Tap icon**. Clicking on the icon will show the list of users. Tap a user from the list to send an alert to view the note.
    d. T**he Share button**
    e. A drop-down menu from where you can do the following operations:
        - **Publish** a link to the note
        - **Export** the note to a PDF

        - An Admin control icon to update the default **note level controls**. This icon is visible only to the Note owner.
        - **Delete** the note
4. Below note title, you will see
    a. Notes, Comments, Files, Links and Tagged comments panes.
    b. A search icon to search through keywords within the note and its comments
    c. A Note Activities icon to view the list of activities on the note
    d. A bell icon to view the audit trails of the note.

Note Pane

1. Selecting the Note tab shows the note pane. The note pane consists of Note Content.
2. The note content is the text, table, and images you add to the note. Only note owners can edit the note content. The note can be formatted using the toolbar.
3. You can also insert tables, images, and links.
4. The copy to clipboard icon is used to copy all the note content.
5. An attachment icon in the top right corner of the note pane allows you to view or attach files to the note.
6. Use the Save icon to save any changes you have made to the note.

Comments Pane

1. If you have shared a note with a collaborator, he or she can attach comments to the notes. As a note owner, you too can attach comments to your own notes.
2. Selecting the Comments tab shows all the comments attached to the note.
3. At the top of a comment, you will see the comment header.
4. On the left side of the comment header, you will see the following elements:
    a. Profile photo and name of the author of the comment
    b. Date and time of the last update to the comment
5. To attach a comment, click on the + icon at the bottom right of the Note view.
6. The comment header of a new comment will have the following controls on the right-hand side:
    a. A save icon to post the comment.
    b. A discard icon to discard the comment
    c. A file attachment icon, using which you can attach documents to the comment
    d. Toolbar to format the content
7. The comment header of an existing comment will have the following controls:
    a. Reply to that particular comment.
    b. Tap to refer users to view the content
    c. A copy icon to copy the contents of the comment

8. If you are the author of the comment, you will see
    a. An Edit button. Clicking on it will open the comment in an editor.
    b. A menu that will allow you to delete the comment or attach documents
9. If you are the author of the comment, you can format the contents using the toolbar of the editor.

Links Pane

1. The Links Pane lists all the links that have been added to the note or any associated comment.

Files Pane

1. Selecting Files pane shows a list of all the files attached by all the users to the note. By default, the most recent files attached are shown at the top of the list.
2. At the top-right side of the Files pane, find the filter and sort options to process the list.
3. Selecting a particular user from the drop-down list will show all the files attached by the user.
4. To sort the list by date, choose the Newer or Older option from the drop-down. Choosing the Newer option will show the most recent attached files on the top. Choosing the Older option will show the files attached earlier on the top.
5. Choosing the Type option from the drop-down will show the list sorted by type of file.

Tagged Comments

1. Comments that have been tagged with a Shared Tag are visible in this pane