**User Manual for Consultation+**

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Privacy

Our application is GDPR complaint and does not store any personally identifiable data. All of login security and privacy is offloaded to Microsoft and the only thing that we must store is your email. Storing data such as location, recommendation and searches are optional. The location data helps the dashboard filter data based off geographical location, the recommendation data is used to help display helpful articles more prominently and search data is used to populate the tables and graphs on the dashboard so you can see what type of things other users are searching.

Getting started

To start up the application simply start the .exe file. If it is your first time logging you, you will be required to register which consists of selecting your county from a list. If you do not want to share your location or cannot find your county you can select “N/A.” Upon registering, you will see a privacy notice pop up which outlines three options that you can select. The first option, no data, will allow the application to work without sharing your recommendation or search data to other people but you can still view other people's recommendations and their search data on the dashboard. Sharing your recommendation data will mean that you can upvote or downvote articles and, finally, the last option will allow you to add the queries you search and links you click to the dashboard in addition to sharing your recommendations.

Now that you have completed registration you can perform searches. On the menu tab you can see the following tabs:

* Whitelist – You can select, create, and delete categories here. View the category section for more detail.
* Dashboard – This will take you to the dashboard.
* History – You can view the links you have clicked and at what time here.
* Privacy – This will allow you to change your privacy settings. It is the same panel as the one that pops up when registering.
* Help – This will open this manual.
* About – You can view the team that created this application.

If you feel like there are not enough results for a query, then click the “Not enough links?” button that appears after the last article. This button sends the development team an email containing the message that you type into the text box.

Categories

We start by defining what a category is:

Category – a list of websites that we search when a user types in a query. If the category is ticked, we search it otherwise we do not.

Upon opening the “Whitelist” tab from the search form, you will see a list of categories. These are predefined categories that you can add or delete by selecting the “Create category” or “Delete category” options. All selected categories will be searched. These categories are saved to your OneDrive every time you close the application, so you do not need to worry about updating the settings each time you login. You can select any number of categories to search, although, having no categories ticked will not display anything.

“Create category” allows you to add your own category to the list of categories. When you are creating it, you can enter any name that you want and choose which sites to search when the new category is selected. Any category can be deleted later.

If for some reason you want to return categories to their default settings, all you need to do is delete the categories.txt file from your OneDrive and reopen Consultation+.

Finally, the websites that you see when you choose “Create category” are websites that we chose to include in our search engine. If you want to include your own websites that are not in this list, you will need to create your own search engine and use developer mode. We have outlined the steps to do this in the Developer mode section.

Developer mode

Developer mode is a mode that allows Consultation+ to search using a search engine that you have made rather than the one we have already created. One thing to be wary of is that upon activating developer mode you will lose the category functionality, but it can be regained by deactivating developer mode.

These are the steps to creating your own search engine:

1. Head to [this](https://programmablesearchengine.google.com/cse/all) link.
2. Select Add and fill in the form. You can give your search engine any name and simply add the websites you want to search. Do not add the “https:// “ before when entering the websites.
3. Select “Head to control panel” and take note of the search engine ID.
4. Head over [here](https://console.developers.google.com/apis/dashboard) and then find the name of the search engine and click on it. You will see an API key being displayed, take note of it.
5. Start-up Consultation+ and head over to the developer panel. Enter the API key and search engine ID that you copied from Google and click activate.
6. All your searches now will use your own search engine until you select deactivate. Consultation+ can store your most recent search engine used in your OneDrive so the next time you want to use Developer mode you can simply click Activate rather than searching for your keys. If you decide to use a different search engine in Developer mode, then the new one will be saved rather than the older one. The default search engine is always saved so you do not need to worry about losing it.

History

This feature allows you to view the time and URL of articles you have clicked on. You can select the top date panel to select the exact day you want to view history for. Unfortunately, history only shows your history from the current session so if you want to view history from previous sessions you should head to your OneDrive and open history.csv. This will open an Excel file containing your history. If you try to open history without having clicked on any articles you will get a pop up telling you that there is no history to display yet.

Dashboard

Our dashboard allows you to view search and articles clicked data for all other users in UK that are sharing their data. You can view the most frequent queries and articles clicked as well as the number of total requests, unique requests, and new users in the past 5 weeks. By clicking on various regions on the map you can filter the data based off geographical location. The dashboard works better the more data it has so we recommend you share your recommendation and search data.

Errors

|  |  |  |
| --- | --- | --- |
| Error | Cause | Fix |
| Pop up telling you that the database is not connected. | The database is turned off for some reason so we cannot connect to it. | Turn the database on (or ask someone who can) and restart Consultation+ |
| Pop up telling you database was unsuccessful in saving query/URL. | The backend was unable to save data. This could be because the user email was invalid, or connection failed. | It is very unusual to have this happen since if the database detects it is a new email it will ask you to register. We recommend you try to search another query or click an article and see what happens. If it continues to occur restart Consultation+ or the database. |
| No articles are shown. | Either our search engine returned no results, or the query searched was invalid. | Make sure the query does not contain any invalid or special characters. If you think that it is because our search engine returned no articles, hit the “Not enough links?” button so that we can add more websites. |