Text highlighted in yellow to be done by Prakash

Text highlighted in green still to be done by Marc/Arnaud

* Text highlighted in grey moved to next version v1.3

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# General

## Personal Data Action for Arnaud

Patentopolis needs to comply with Data Protection Regulations

## How to change typos in the programmed text

**Action for Infovinity**: userguide to change the programmed text in the script file

## Date fields

2 March: implemented

## Family Type field

**Action for infovinity:**

IP type: drop list of presets – During import – can only choose one of these + during editing, drop down list of options.

Discussed 2 March Marc/Arnaud

Family type with drop list works for Marc (but not for old accounts)

|  |  |
| --- | --- |
| Fields | Comment for userguide (**Marc** ) |
| Patent | Generally speaking, patent rights are created upon filing. Here the field “patent” could be chosen as soon as a patent application has been instructed. The status field (see below) will define whether the patent application is already field or not. |
| Design | Include registered right for 2D and 3D works, as well as unregistered rights for such work as it may exist in some countries |
| Trademark | Include registered right for distinctive signs, as well as unregistered rights for such signs as it may exist in some countries |
| Know-how |  |
| Trade secret | Exist in some countries; the following criteria need to be met in order to qualify as trade secret: (1) information has certain value to the company (2) it is secret and not easy to derive from public information (3) it is being protected through reasonable security measures |
| Software |  |
| Other |  |

**Next v3**

* With drag/drop from available fields and order up/down like below for admin in project admin tab

## Status Type field

**Action for infovinity:**

Status: drop list of preset

Discussed 2 March:

The droplist works but mismatch between color matching and dropdown list ; Prahask check capitalized (“published” in color matching but “Published” in Dropdown list 🡪 **Action for infovinity**

|  |  |
| --- | --- |
| Fields | Comment for userguide (**Marc** ) |
| Unfiled | after instruction and before filing |
| Filed |  |
| Published | Publication by the patent office of the patent application at 18 months from filing (or priority if applicable) |
| Granted |  |
| Closed | lapsed, expired, revoked, abandoned |

**Next v3**

* With drag/drop from available fields and order up/down like below for admin in project admin tab

## Placement of Inventor field

**Action for infovinity:** Inventor field should come after owner reports (simple report and excel report)

## Format of hyperlinks – representative publication url

The links to the publication urls in current ip tab + portfolio tabs, are editable now, but show the url all the time. It is not possible to open the actual url. Instead, it should show a link text for example "Link to publication ". When clicking on it, the url should open in a new window. When in edit mode, an edit button should be placed beside the link text, so that the link can be edited.

There should be a link to the representative publication url for each member - maybe a pdf icon in the member list to the right of each member row with link.

Publication number urls should open in new windows.

This is also true for the portfolio pdf report. Link in pdf report is currently actual link text, should be a link with the text "Link to publication". If it is not possible to have a link in the pdf report, then there should be no link at all.

Discussed on 180224

Action for Infovinity: create two buttons (open link and edit link) in write mode and only one button (open link) in read mode

## Family type

Add the family type to Simple report + excel report (should come after catchword)

## Caption under profile

The caption option is very nice - Marc!

**Action for infovinity:**

1. Creation of “setting section” with caption
2. Provide list of the field names which can be used for the caption
3. The caption options should also be the same **on portfolio tab** (currently the caption definition is only in the list on the report tab)

Caption 1 should also be Top title of each family on Portfolio tab and Current IP tab.

Caption 1 should also be Top title on simple portfolio report

## Demo and client data

Discussed 2 March Marc/Arnaud: Action for infovinity

* The N/A seems to work but for some fields (the status, family type, dates) it says N/A next the field for all the data.
* Mismatch between the status and colour code (due to capitalized letter)
* Upload of the dates, status, family type: check the format and the use in demo data 🡪 need to update the csv file?

## Images – where to store them to be able to access from demo platform?

The image links don't work.. What is the correct format? And where are the images?

How does the non robot searchable folder work?

Discussed 24 Feb

**Action for infovinity:** document to explain + functionality of original spec to be created

## Profile editing –

**Action for Infovity**:

1. Correct the matching functionality between “password” and “confirm password” (currently you just need to add 1 character to that field; there is no matching)
2. The save button should be always validated and Add message “missing information” if (1) the mandatory fields are not complete: first name ; work details (company name); password; and email; OR (2) mismatch between password and confirm password

## Loading data files – errors

* Errors in date fields - Something wrong with import of publication number/date application number/date - not putting in the correct fields from the csv file (< Marc 180216) – see Munzer002 – test project compared to sample data I sent to you previously.
* See the demo member files for Rocky Mountain Bicycles – not loading the publication date or the application date. Prakash can confirm the csv file format he has implemented. MM can check on his end to see that his format is correct. Check also the database see 162\_member where the date fields all state 1970-01-01 …
* Also a problem with length of fields? See test file “Rocky Mountain Bicycle problems with family import.csv”. This file does not import the family with ID 65. If I reduce the number of companies to 1, then the family imports correctly. Maybe there is a length limit on the input data (Owner) which is causing that import line to no import?

## Statistics for superadmin

Discussed 24 Feb. 18

**Action for Infovinity:** add basic statistics typically how many accounts / projects / users / families

## To Check for Arnaud/Marc

* content of activation email
* content of forgot password email
* Uniform display across different browsers
* Adapt the csv file with capitalized letter for status

## Spam – Activation links always in my spam folder

I am not sure why, but the emails from the system with the activation link are always in my spam folder. Is there something we can do to remove this behaviour?

Discussed 6 March

* Action for Infovinity: Use authenticated email sending from the server
  + You can use the following SMTP server and email account
    - MX Records
    - Your MX records are correct.
    - 10 mailstore1.secureserver.net
    - 0 smtp.secureserver.net
    - Host Names (CNAME)
    - POP pop.secureserver.net
    - IMAP imap.secureserver.net
    - SMTP smtpout.secureserver.net
    - Email address: [support@patentopolis.com](mailto:support@patentopolis.com)
    - Password: Welkom123

# Demo account

## Pre-selection of demo user account

Karine is advising not to accept anonymous login to the demo. (To avoid infringement and enable contract enforcement) and to validate access. You can only do so if you have accurate data.

**Infovinity 🡪 is it extra to do the following?:**That means an extra validation email is sent to [info@patentopolis.com](mailto:info@patentopolis.com). A second validation email is received by [info@patentopolis.com](mailto:info@patentopolis.com) with the details of the account: first name, last name, company name, email address

The account is validated when both the user and Patentopolis have validated the accounts.

If the user has validated the account and not Patentopolis yet, message

“Account under validation by Patentopolis. Please contact us at info@patentopolis.com”

“You will not be able to login, view or change your registration until we activate your account.”

## First time access page

Dips online demo agreement has been drafted for Patentopolis only. It is not meant for Guardian. Terms of the Licence agreement between Patentopolis and Guardian for the separate use by Guardian of DIPS needs to be checked/ and may be completed. (ex for the use by Guardian with its own customers- liability etc...) Guardian needs to contact its own lawyer for its own use and may implement its own policy. Patentopolis needs to decide which part of the terms of the Saas agreement will be flow down in Guardian agreement; (Intellectual property rights BTW).

**Discussed 21 Feb:**

* the text displayed on the welcome text is dependent on the subdomain. This could be implemented in the same way as the logo images. For example, the welcome text could be in a file called myip\_gipc\_eu\_welcome.html or login\_mydips\_eu\_welcome.html. )
* the online demo agreement of Patentopolis version should not be used on GIPC version

**Action for Infovinity:**

(1) the first-time access page should be different for PP version and customized version e.g. Marc/GIPC version

* the text displayed on the welcome text is dependent on the subdomain. This could be implemented in the same way as the logo images. For example, the welcome text could be in a file called myip\_gipc\_eu\_welcome.html or login\_mydips\_eu\_welcome.html. )
* the online demo agreement of Patentopolis version should not be used on GIPC version)

(2) for PP version : (2.1) the page includes with license included (2.2) add print functionality for license

## Change profile

By law it is compulsory for to enable the user to modify/delete its profile. (The current version does not enable me to do so - could you make sure it is fixed) 🡪 remove job title as mandatory field

Discussed 24 Feb 18: Profile cannot be deleted

### Images of demo data

**Broken links; shouldn’t we upload data on server and direct the image link there? Action for Infovinity: add prefix for server uploader**

## load files Part 1

**Action for infovinity**

* please deactivate the “choose file” buttons on page Data
* We could create users though  🡪 In demo account: no user creation possible

## load files Part 2

Karine suggest disabling the function for the demo to avoid risk of virus and infringing content. (As we are responsible by law and do not want to find ourself in front line in case of problem,the best way is to avoid risk by design)

Discussed on 21 Feb:

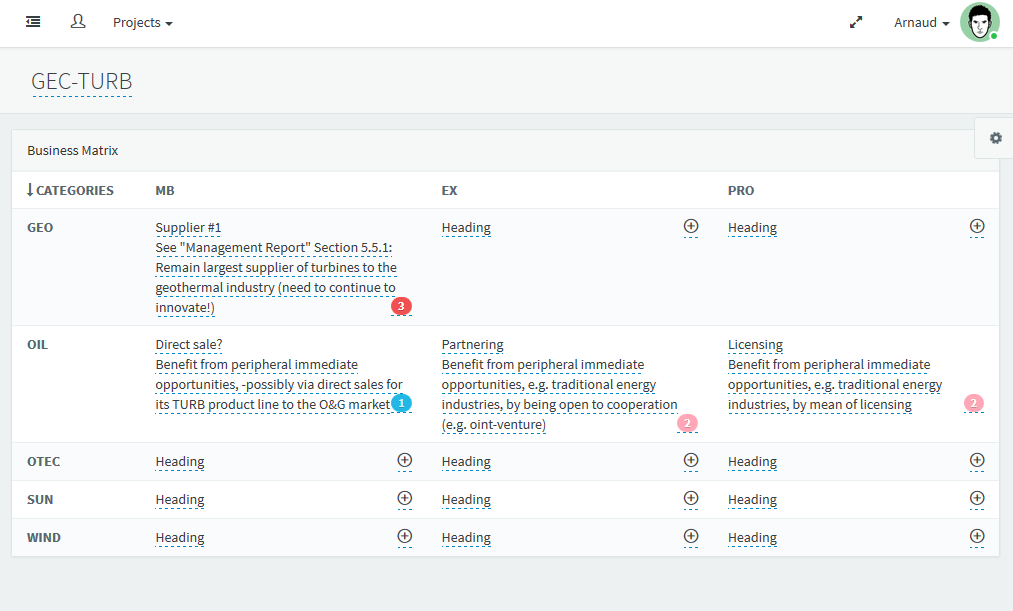
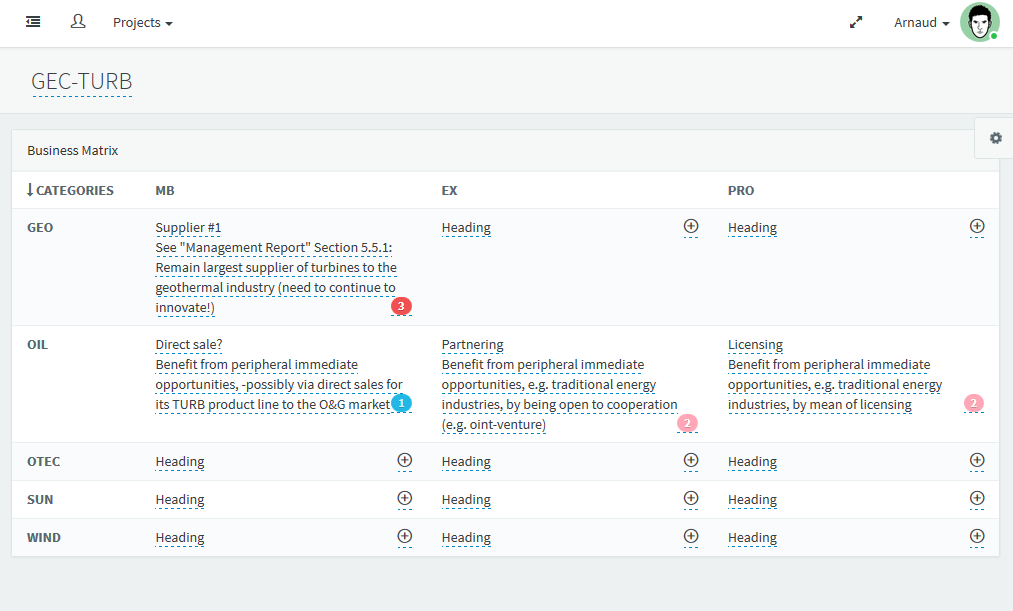
* We should avoid uploading files/pictures/data;
* Possible to download data – but not upload it. It should be possible to generate the pdf report and the excel file. Otherwise the user cannot see the functionality.

**action for infovinity re** setting for demo

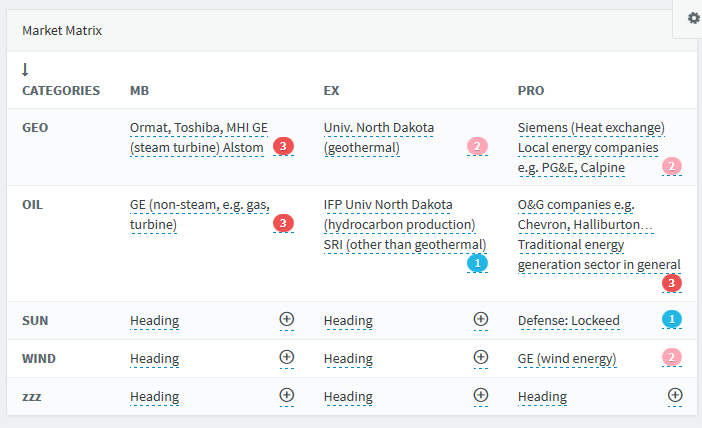
* For both demo projects (portfolio and strategy)
  + The following fields should be disabled
    - Re page data: “choose file buttons” should be **disabled**
    - For pages Current IP and Portfolio: Adding “new”  should be **disabled**
  + The following fields could be kept and are ok in the demo
    - Re page “categories”: adding/deleting new category ; editing the name ; entering/editing description
    - For pages Current IP and Portfolio: Editing the data (all fields) ; ticking boxes for categories
    - Re Page “reports”: download/export
* For demo strategy project: The following fields could be kept and are ok in the demo
  + For page business: ticking boxes for categories ; adding data (name, description)
  + For page market : ticking boxes for categories ; adding data (name, description)
  + For page Desired IP: ticking boxes for categories ; adding data (name, description
  + for page Plan : adding data (name, description)

**Next version:** consider to add extra content (eg TURB) IP to get some user experience during the demo

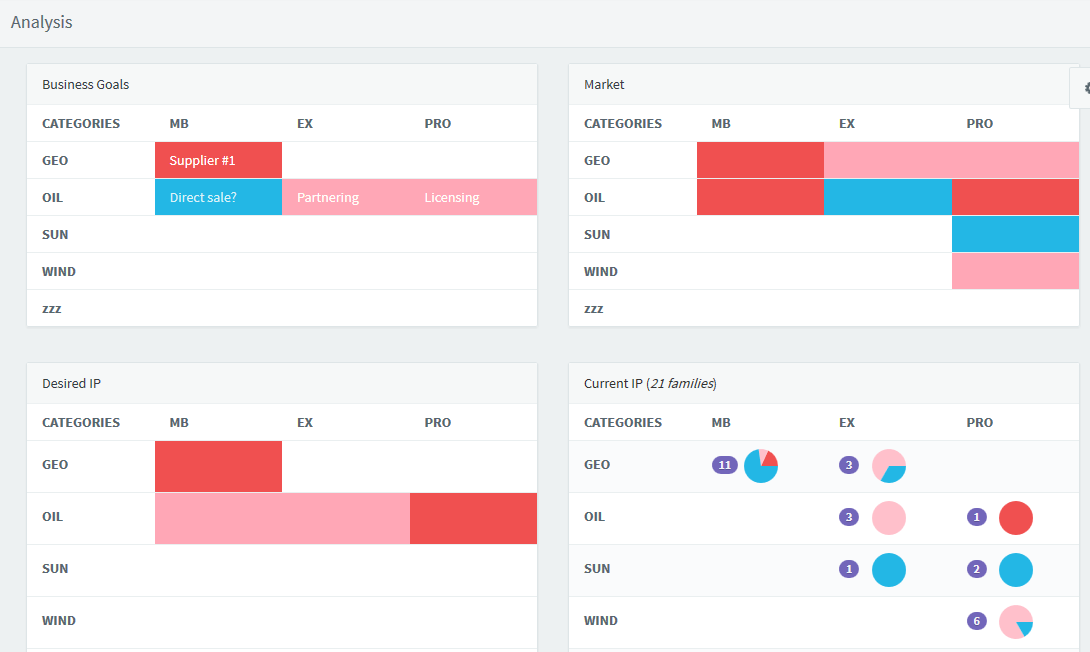
* Categories: GEO, OIL, SUN, WIND
* pages business,



* page market



* page desired



## What happen if I press the delete buttons

**action for infovinity re** setting for demo

* Re page Portfolio and page Current IP: Deleting family is fine
* Also, deleting the whole project is fine

## Uploading right profile when creating demo account

Action for Infovinity: when the demo account is created

* Assign profile “strategy Write” with Demo Strategy Project
* Assign profile “portfolio write” with Demo Portfolio Project

# Normal account (both strategy and portfolio)

## Upload of files

Status?

## Upload of images

Status?

Currently, the images are a bit problematic and we need to upload them manually. We had originally added an image uploader to the spec, but I don't know if this has been implemented yet? I can live without it, but it would make the platform easier to use for others.

Action for Infovinity: send email explaining the process of uploading images

## Change the classification order in current IP / Portfolio pages

Use caption in profile:

first line: {{catch\_word}}

second line: {{company\_name}}

by default when creating a new demo account: first line is catchword and second line is company name; this should not be editable

possible also to combine 2 fields in one line: {{client\_ref\_Number}};{{status}}

**Action for Infovinity:** provide list of fields 🡪 Action for Marc/Arnaud: add to user guide

## Same csv format for import and export

19 Feb: not possible for the time being. These are two different formats 🡪 next v3?

## Delete category  impact on data

Action for Infovinity: delete category if no data associated by user to the category

## Logging

Status?

Action for Infovinity: send email explaining how to see the logging in the database

## Userguide to update (MM action)

* Csv file
  + Family type, inventor
  + category added to the csv file, with strategy option, ranking (similar to the csv export from report)
* Color code

## Should be possible for admin user to make other users admin users

Action for Infovinity: A user who is an admin user should, when editing other users, be able to give them “admin” rights.

There should be a radio button, just like the “active/ deactive” options.

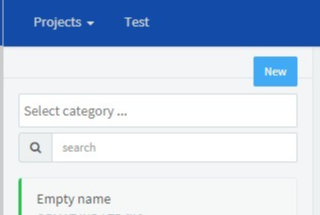
# Portfolio page

1. When logging in first time, still going to "Scope" instead of portfolio

For example - Munzer002 - temp1234 - only have one project - don't have scope  - should go directly to "Portfolio" tab

c) Delete family button doesn't seem to work?

d) Re New button: Remove line (see below)

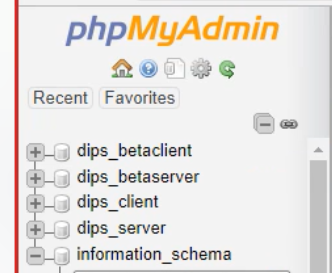


# Notes

## Database structure

Dips\_betaserver and dips\_betaclient = v1.2

Dips\_client and dips\_server = v1 (first version)



Data located at



For normal accounts: Images saved at project level

