



Multi-Users Mode Configuration manual

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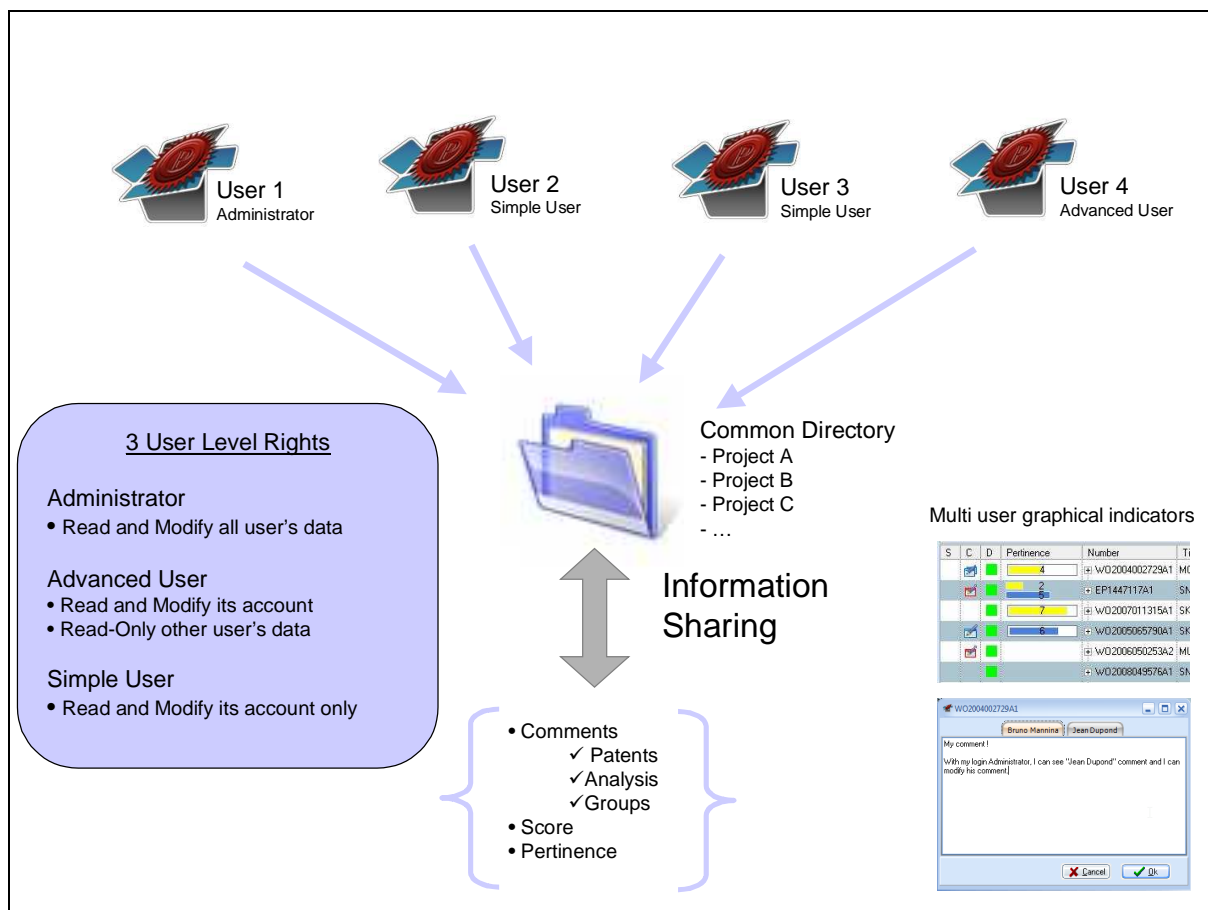
A. Information sharing

Note: Multi-users version is only available since Matheo Patent version 9.4.

A1. Basic concept

Matheo Patent v9.4 allows a multi user mode. In this mode users can share information on the result of their requests. This document describes how to manage user accounts and how to configure the multi user mode.

The Matheo Patent user mode is based on a shared private directory, the Common Directory, containing the user requests. The Administrator manages the user rights (read/modify/delete). Three types of users are proposed in Matheo Patent multi user mode: administrator, advanced user and single user.



A2. Groups creation

In the multi user mode, the patent groups are visible by all users. When a user creates a new group, and associates patents to this group, the other users will see this new group and the associated information in their Matheo Patent interface.

A3. Shared patent information fields

In Matheo Patent, each user can create and modify certain patent information fields. In the multi user mode, the following fields and sub fields will be share with other Matheo Patent authorized users.

The sharing of fields also introduces some graphical indicators on the software in order to highlight the inputs of other users.

The shared fields and graphical consequences:

- **Field name: Comment :**
 - On a Patent
 - On a Patent Analysis Constraint (i.e. IPC, Applicants, Inventors, EC,...)
 - On a Group

Icon	Description
	Patent commented by the user only
	Patent commented by the user and other users
	Patent commented by the other users only

Meaning of Comment field icons in Matheo Patent

- **Field name: Pertinence**
 - MPatent shows pertinence for current user (Yellow)
 - MPatent shows pertinence average for all users (Blue)

S	C	D	Pertinence	Number	T
			4	+ WO2004002729A1	MO
			2	+ EP1447117A1	SM
			7	+ WO2007011315A1	SK
			6	+ WO2005065790A1	SK
				+ WO2006050253A2	MU
				+ WO2008049576A1	SM

- **Field name: Score**
 - MPatent shows values for current user (Skyblue and Fuschia)
 - MPatent shows average values for all users (Green and Orange)

PR.D	▼	A	Co	B	R	Score	Ci
02/03/1999	9	5	8	3	20	36	
06/12/2005	4	25	16	2	5	48	
IR 24/05/2006	4						

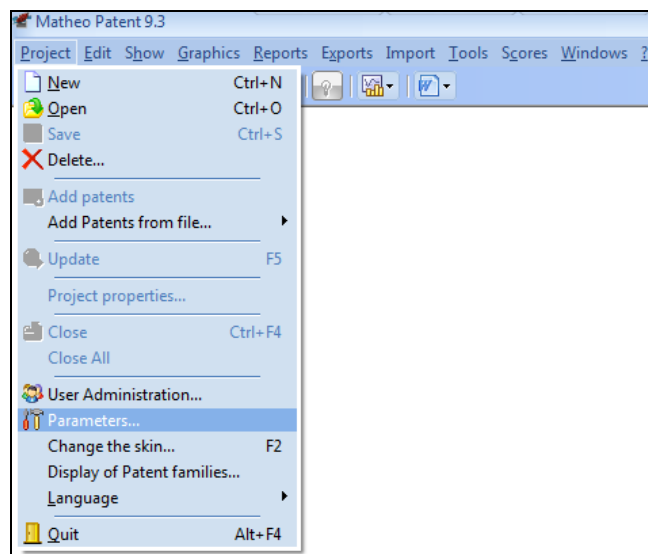
Note: All exported/reported documents will integrate all users' data (Comments, Score and Pertinence)

B. Administration step1 : the Common Directory

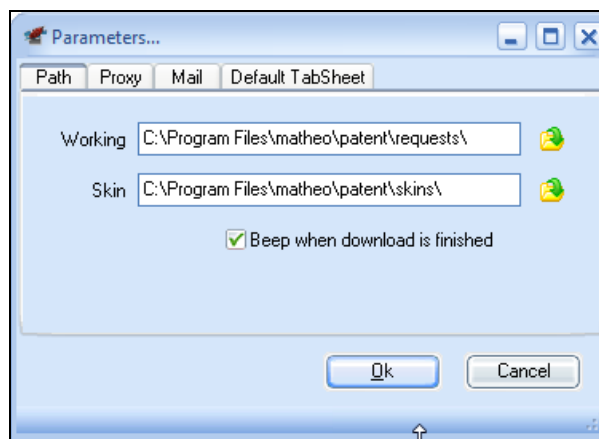
The very first step for the use of Matheo Patent in multi-user mode is to choose a first Administrator (others may be create later). This first administrator will configure Matheo Patent for the multi user mode and will create the user accounts.

The selected Administrator has to define and select the Common Directory in which the users will share their requests.

For this step, the administrator has to select in Matheo Patent: the menu « Project » - « Parameters » Tab « Path »



On « Path » Tab, change the « Working » path with the navigate button if needed and choose the adequate Common Directory or Working Path



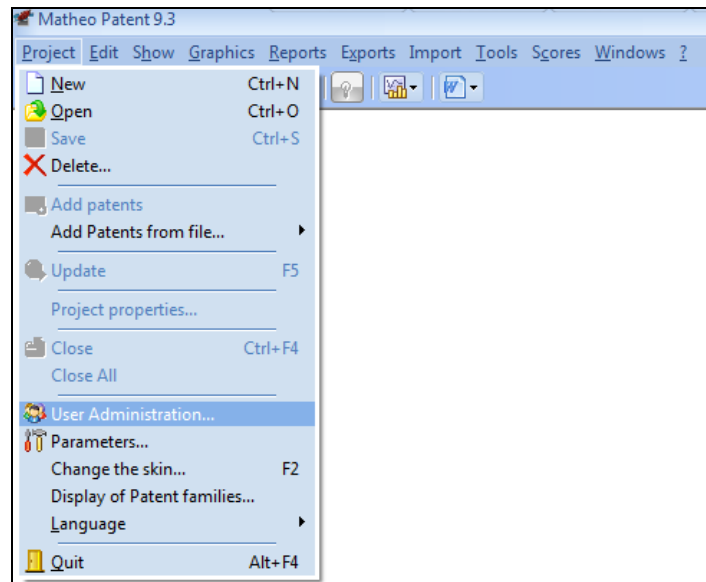
The Administrator need to be sure the all the future users of the Matheo Patent multi user mode have access to this directory (in accordance to the local intranet rules).

IMPORTANT :

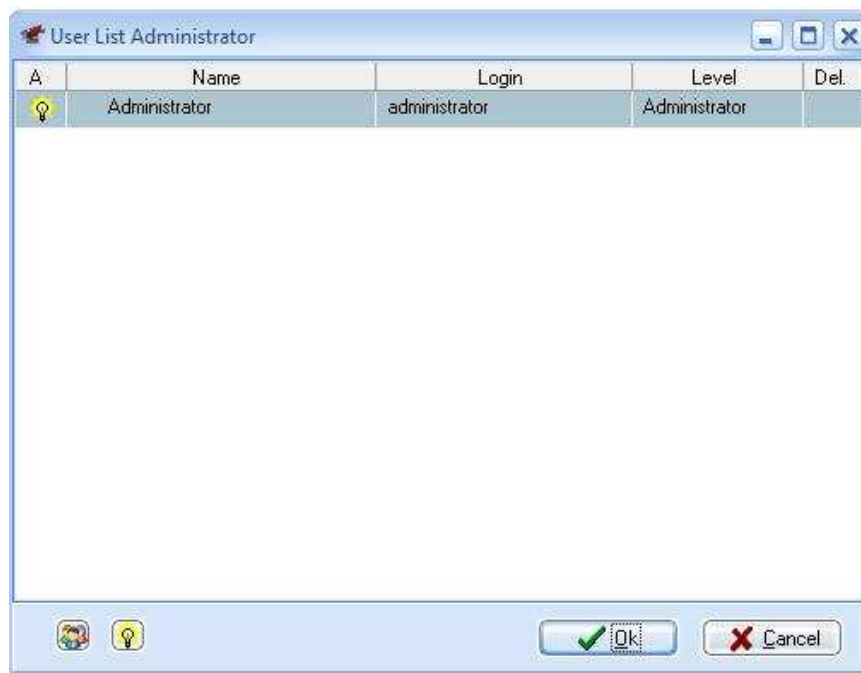
To validate the Working Path change, the Administrator must quit and run again Matheo Patent

C. Administration step 2 : the first log

When the Administrator runs again Matheo Patent, he/she has to configure its administrator account using the menu 'Project' > 'User Administration'



The Administrator must now right click on 'Administrator', use the menu 'Modify user parameters', and change its account information: Full Name and Password.

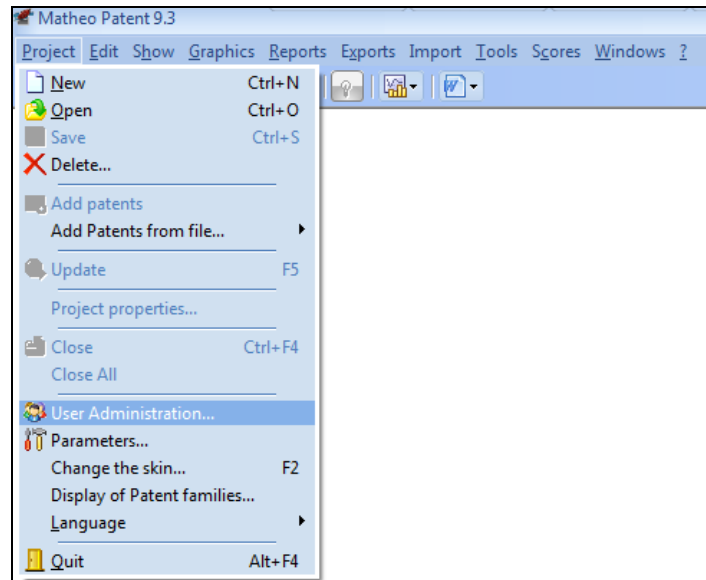


Note : It is very important for the Administrator to change the Matheo Patent administrator account password in order to increase the data security.

D. Administration step 3 : the user accounts

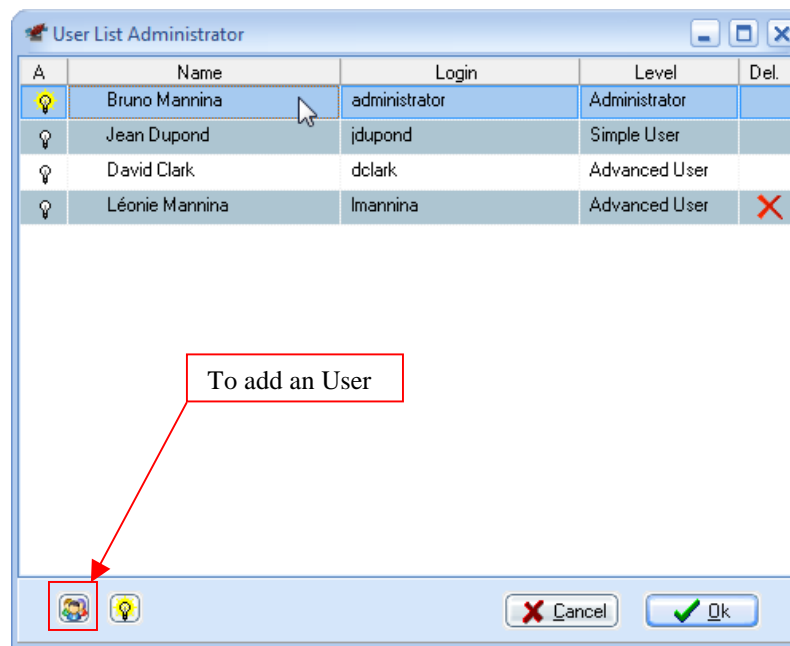
Warning: This step must be done ***ONLY*** by the Administrator.

To go to the User Administration window, use the menu « Project » - « User Administration... ».



D.1 Creation of a new user

To add a user, use the button at the bottom-Left of the window.



The main Administrator can create as much user account as needed.

The required information for the creation of a user account is the Full Name, the Login, the Password and the level of the future user.

There are three different levels for the users as shown on the image bellow.

In this part « Data » designates the entire information field filled by the user according to their patent analysis. These fields are: Comment, Pertinence, Score, Group Comment and Analysis Comment (Also described in part A of this document).

User level : Administrator

- Can Read and Modify all users' data.

User level : Advanced User

- Can Read and Modify its data.
- Can only Read other user's data. Can't Delete or Modify them.

User level : Simple User

- Can Read and Modify its parameters.
- Can't Read, Modify or Delete other user's data.

DON'T FORGET!

Once the Administrator creates a user, he/she must send the Login and Password information to the user, and of course the Common Directory of Working Path name or address.

IMPORTANT

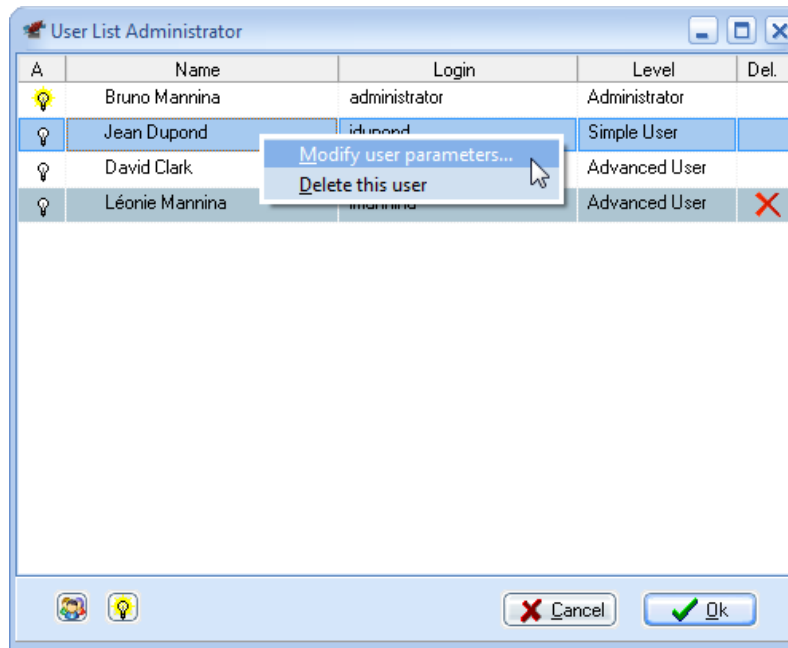
Once the Administrator has created a first user, Matheo Patent multi user management system understand that the multi user mode is started. The consequence is that when the administrator will run Matheo Patent, the identification windows will ask the administration account login and password.

D.2 User management

The administrator has access to two user management options.

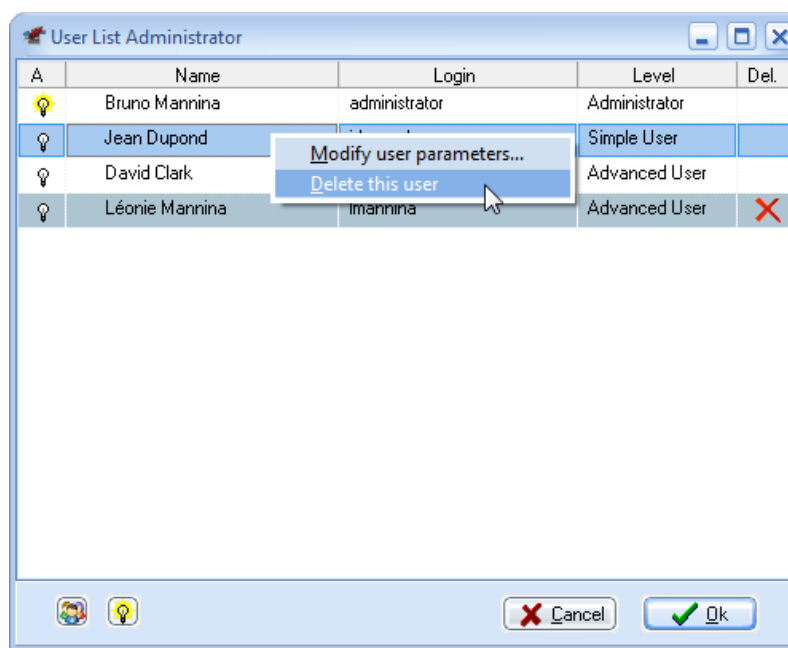
Modify user parameters

First menu allows the administrator to change the Fullname, the password, the Level. But the Login can't be changed.



Delete an user

Second menu allows deleting a user. In fact, the user is disabled. All the information written by this user remains available in projects.

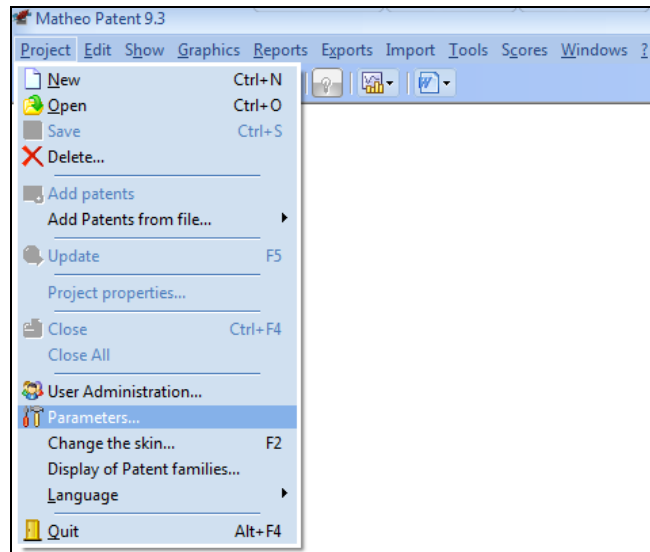


E. User side: Access to shared data

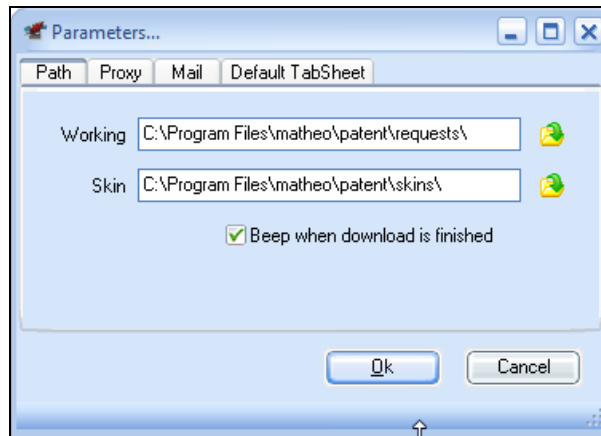
E1. Configuration of the Working Path or Common Directory

Once the Common Directory or Working Path address is received from the Administrator, the user has to integrate this information into its Matheo Patent software.

For this step, the user has to select in Matheo Patent: the menu « Project » - « Parameters » Tab « Path »



On « Path » Tab, change the « Working » path with the navigate button if needed and choose the adequate Common Directory or Working Path



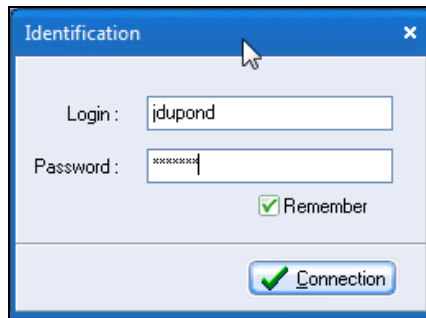
IMPORTANT :

To validate this change, the user must quit and run again Matheo Patent

E2. Identification in the multi-user mode

When the user runs again Matheo Patent, he/she directly arrives on an identification window (as bellow).

The user has to insert its login and password for Matheo Patent.

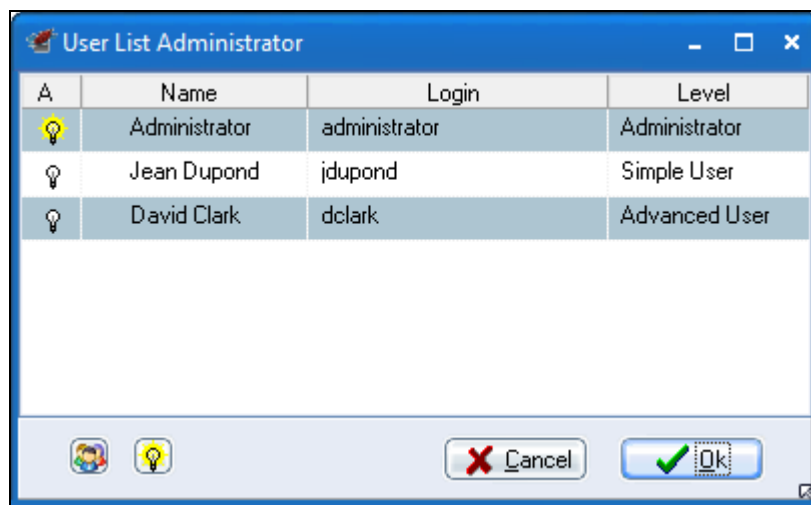


The user can change its password and Full Name. Use the menu 'Project' > 'User management' and right click on your name (Read part D2 of this document).

F. Sample of user level consequences

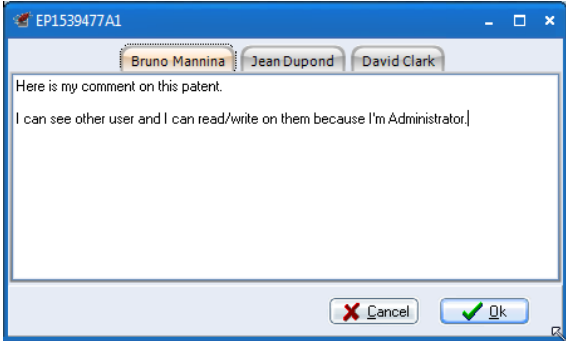
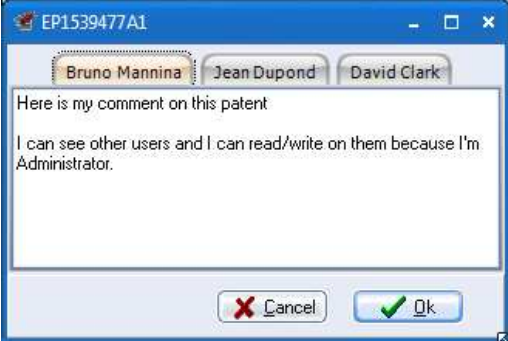

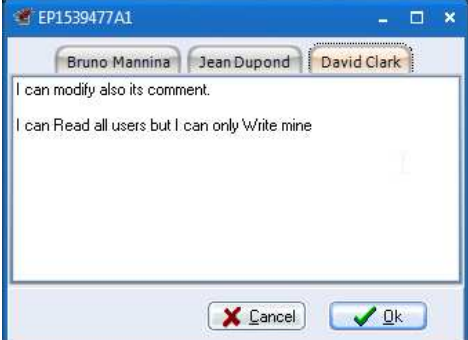

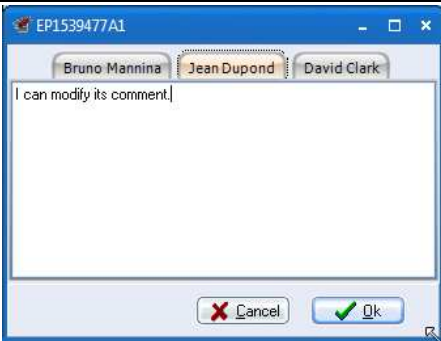
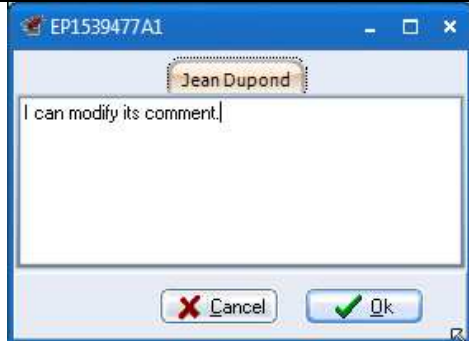
Here is a sample of the impact of different user levels on the field "Comments".

For this sample, three users with the three types of level are used.



A	Name	Login	Level
💡	Administrator	administrator	Administrator
💡	Jean Dupond	jdupond	Simple User
💡	David Clark	dclark	Advanced User

Each user has written a comment on the same patent. Then each user is viewing the Comments on this patent by selecting the Modify comments menu, the table bellow shows the different views of each user.

	Connected with Administrator account (B. Mannina)	Connected with Advanced User account (D. Clark)	Connected with Single account (J Dupont)
Bruno Mannina - Administrator Comments	 <p>Read / Modify / Delete rights</p>	 <p>Read only rights</p>	Can't see Bruno Mannina / Administrator comments
David Clark – Advanced User Comments	 <p>Read / Modify / Delete rights</p>	 <p>Read / Modify / Delete rights</p>	Can't see David Clark / Advanced User comments
Jean Dupond – Simple user Comments	 <p>Read / Modify / Delete rights</p>	 <p>Read Only rights</p>	 <p>Read / Modify / Delete rights</p>