

Inventorium

User Manual

National Information Processing Institute



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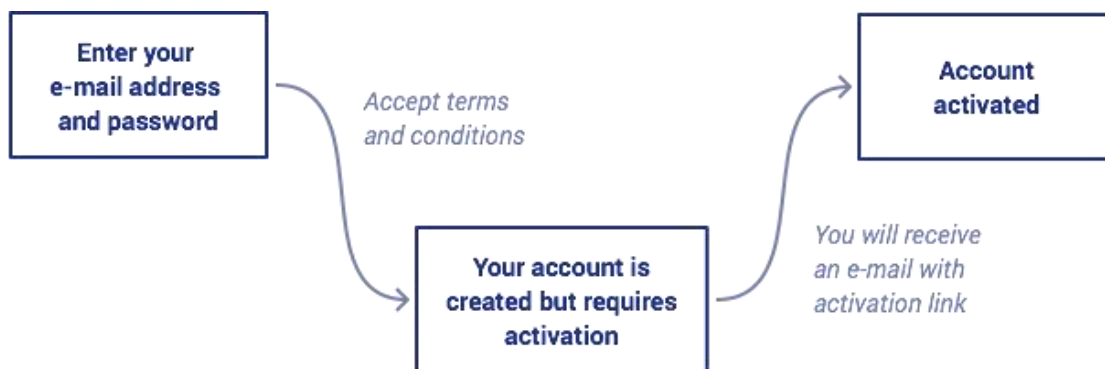
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1 Access to the system

1.1 Registration in the system

You must have an account in the Inventorum system in order to use it. It is only required to enter the e-mail address and a password in order to create an account. Account activation occurs by clicking on the link sent by the system to the e-mail address entered by the user.



Note: Creating an account also means the acceptance of Inventorum Terms and Conditions.

1.2 Supplementing of personal data

It is only required to provide the e-mail address during account registration. However, it is possible to supply detailed user information, such as personal data and contact information after logging in. Supplying such information is not required to search the data in the system, however, it becomes necessary in case the user wants to register an innovation, project or company in the system or mark themselves as an expert or scientific reviewer.

Supplying personal data enables to link accounts between the Inventorum system and the Polish Science system, which will download additional information about a person such as doctorates, post doctorates, publications, etc. The more appropriate recommendations by the system are another benefit.

Note: Personal data are subject to validation and approval by the Inventorum team.

1.3 Account validation

Although you can set up the account in Inventorum by providing your e-mail only, many activities in the system, such as registering the project or innovation company, or signing up as an expert or scientific reviewer requires completing the data (name, citizenship, PESEL number or the date of birth, ID in Polish Science if exists) and validation of the account by the Inventorum team. If the data are rejected, the Inventorum team employee decides if the account should also be deleted in addition to the entered data.

The validation procedure is as follows:

1. The user completes the personal data and approves the record
2. The data are sent for validation by the employees of the Inventorum team
3. The Inventorum team checks the concordance of data
4. Data are approved or rejected by a team Inventorum
5. The user is be notified about the outcome of validation

1.4 Log in to the system

There are two ways to log in to the system. First, you can enter your username and password. If you forget your password, you can create a new one by using the "Forgot password?" option Secondly, it is possible to synchronize your account with social networking accounts such as Facebook, Google, LinkedIn, which enables to log into the system using these accounts. Then you do not need to remember the username and password to Inventorum.

Sign in

E-mail address or POL-on login

Password

[Forgot your password?](#)

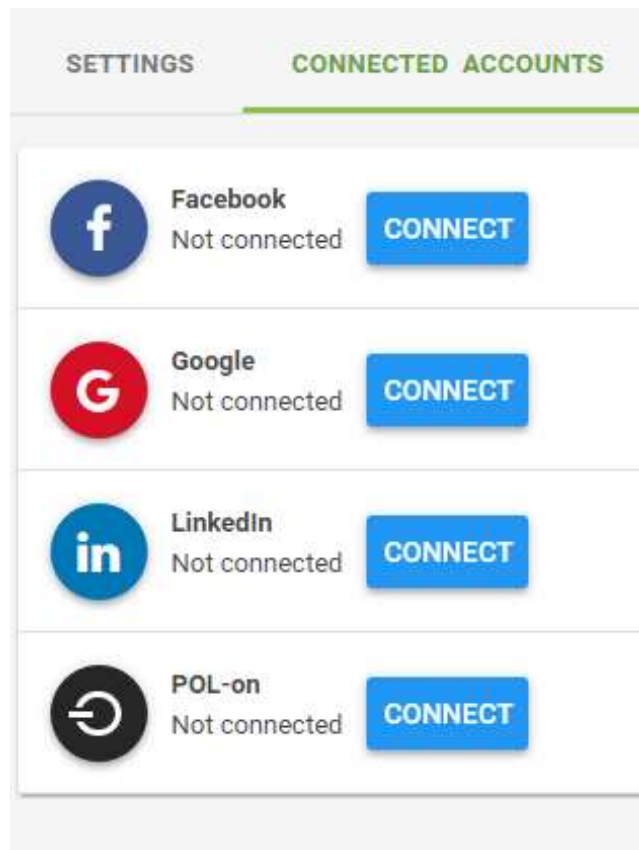
SIGN IN

or sign in with



You don't have Inventorum account? [Create account](#)

At the first login via social media, the Inventorum account is merged with the selected website account (Facebook, Google, LinkedIn). It is possible to manage these connections from the *Connected accounts* tab available after logging in (▲).



1.5 Password change

Call the password reset process by clicking the link in the login form: "Forgot password?". Enter the e-mail address provided during registration, to which the system sends an activation link after validation, which enables to enter a new password for the user account. After accepting the message, clicking on the link and entering a new password, you can log in to the system.



1.6 Deleting an account and profile

At any time you can delete your account and profile using *Delete profile and account* action available in the users's account settings.

Note: Objects associated with the account (company, innovation, conference, project) will also be deleted if they are not linked to other users, companies or scientific institutions.



2 Roles and permissions in the system

Role in the system	Available functionalities
Unverified user	Viewing data in the system
	Supplementing of personal data
Verified user	Innovation registration
	Project registration
	Company registration
	Conference registration
Company employee	Completing the survey
Company administrator (management of data within the company)	Innovation registration
	Project registration
	Company registration
	Conference registration
	Inviting peoples to the company
	Management of company employees
	Enterprise data management
	Acceptance of invitations sent to the company
Verified user associated with the Polish Science account	Management of someone's documents
	Management of someone's keywords
	Management of someone's degrees and titles (doctorates, post doctorates, professorships)
	Management of supervisions and reviews data
	Management of someone's publications
The user with current employment or function in a scientific institution (data management in a scientific institution or its units)	Innovation registration
	Project registration
	Conference registration
Scientific unit administrator (data management in a scientific institution or its units)	Innovation registration
	Project registration
	Conference registration
	Acceptance of invitations sent to the scientific institution

3 Navigation in the system

3.1 Dashboard

Displays the user's dashboard, which is the central point of information management in the system immediately after logging in. The dashboard shows the most recent recommendations, the most recent watched data, companies to which the logged-in user is related. Each of these groups of information includes the "Show more" option, which displays the full set of information. You can return to your dashboard by click on the Inventorum logo.

3.2 Messages and account management

There is a place for displaying messages and notifications, accessing help and managing the account settings in the upper right corner.

3.3 Search

There are options for innovations, protection, projects, companies, scientific institutions, experts and conferences, which display lists of all information from a given group in the upper part of the screen. Below is a search bar where you simply enter the search text and press Enter to search for information.

The data are searched as a full text in all available natural languages. It is possible to narrow down the search results by using suitable filters. Full-text search encompasses areas included in the table below.

Area name	Field
Innovations	name
	owner
	description (including files)
Projects	title
	number
	full name of the manager
	descriptive data (abstract, notes, keywords, files)
	names of persons associated with the project
	names of companies associated with the project
Experts and reviewers	full name
	title/degree
	e-mail
	webpage
	person's description
	persons' documents
	keywords, classifications
	the names of publications, projects, innovations, scientific institutions, companies associated with the person
	names of doctorates and post doctorates reviewed and executed by the person

Scientific institutions	name + the name of units
	fields of activity
	principal office address
	e-mail, phone
	the names of innovations, projects, conferences related to the institution
	names of persons associated with the institution
Companies	company name
	industry
	principal office address
	e-mail, phone, website
	description, business description (including files)
	PKD (code + text)
	business type
	the names of innovations, projects, conferences of the company
	names of persons associated with the company
Protection	the name of innovation related to the protection
	the description of innovation related to the protection
	names of persons associated with the protection
	names of companies associated with the protection
	protection description
	the name of the patent office
	priority country
	countries where the right applies
	protection type
	the number of the application and the document confirming the right year of application, the year from which the right applies, the year to which the right applies and the year of priority
Conferences	name
	description
	location
	names of persons associated with the conference
	names of conference organizers
	conference address
	attached files

4 Recommendations

4.1 Recommendation mechanism

The system actively prompts users with the most relevant innovations, projects, companies, scientific institutions, experts, and conferences. Recommendations are proposed based on data contained in the user profile and the profiles of its companies and research institutions, whereby the user can decide which elements are taken into account by editing the recommendation criteria.


4.2 Declarations

Additionally, recommendations are based on the declarations of companies and scientific institutions. Each entity has the **Looking on the market** option, which contains the field to enter the description of the innovation, project, partner (company or scientific institution) or expert looked for. The administrator edits these data in the company, and anyone related to the data edits them in the scientific institution. The descriptions entered are made visible to everyone.

5 Innovations

5.1 Innovation registration

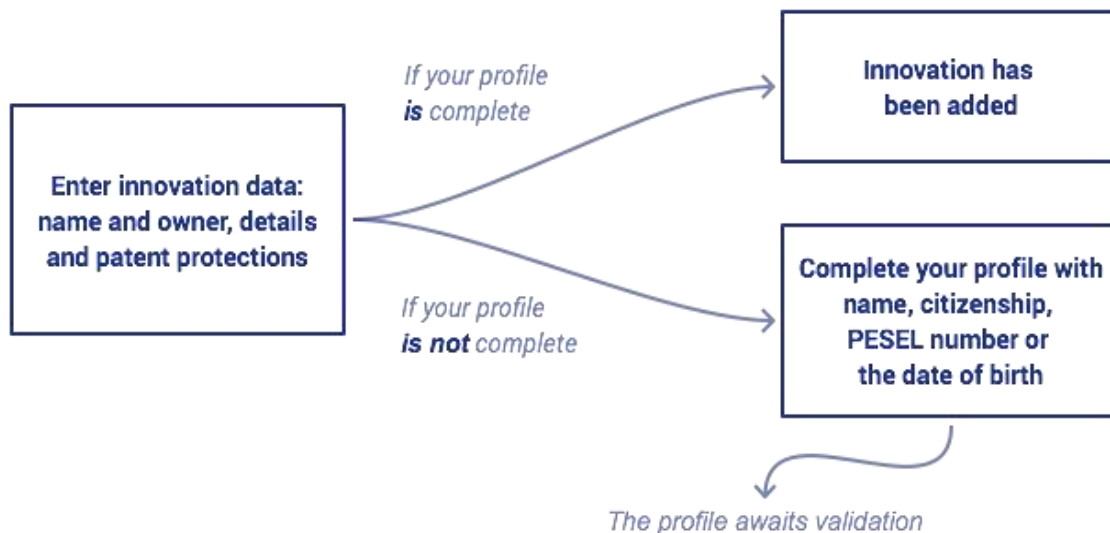
You can register an innovation (marketing, process, product, organizational) in the system. To do this, you can call the Add action available in:

- the innovations list ()
- the Innovations tab available from the profile of a person, company or scientific institution

It is necessary to complete the form with the required data (Name and owner, Innovation details, Patent protection) and to approve the operation.

Note:

You need to complete a profile, which will be validated by the Inventorum team in order to add an innovation. The System will notify you of the validation result.

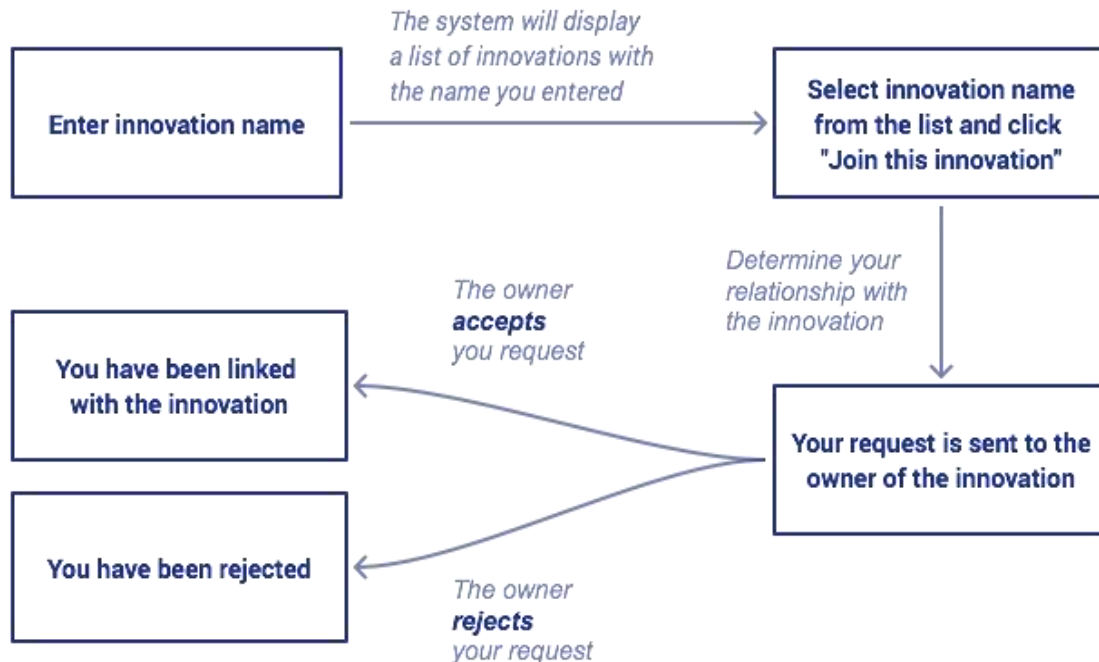


5.2 Joining to the innovation

You can associate yourself with the existing innovation in two way.

1. An attempt to associate is initiated if you enter the existing name of innovation when adding. In this case, the system displays an informational message that the innovation already exists in the database. You can select "Join to this innovation", in which case you will only have to determine your relationship with the innovation.

Also, you can add another innovation of the same name. Just select a suitable value in the presented window.



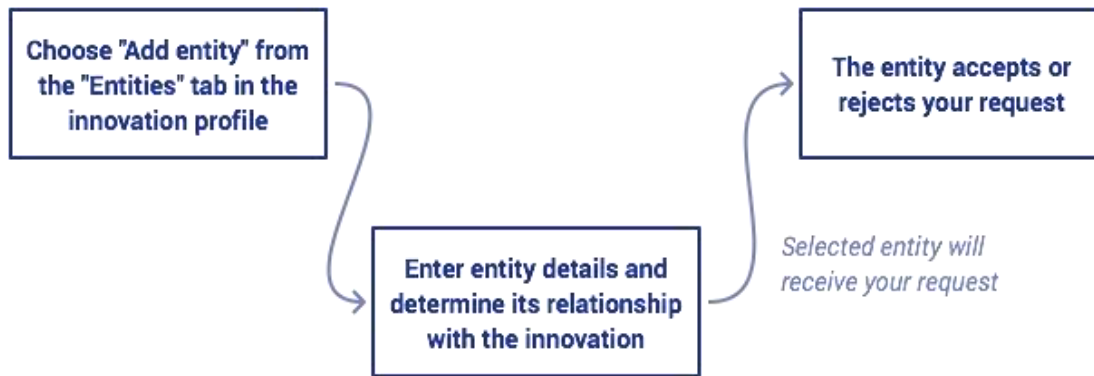
- In the innovation profile is available the "Join to this innovation" action. In this case, the filling of the form is required. This form establishes the relation between user and innovation. The owner of the innovation must confirm this relation. After form filling, the authorization request message will be sent.

Note:

When the entity (i) has created the association with the innovation and (ii) the user that can accept this association does not exist, then this association is accepted automatically. The entity becomes the administrator > entity function = owner/co-owner.

5.3 Linking from another entity to my innovation

The person managing the innovation may associate other entities with it. It is possible to link an existing entity in the system. In order to link, you should select the "Entities" tab in the innovation profile view and select "Add entity". After filling in the data in the form, an invitation will be sent to this person. The link must be accepted.



5.4 Adding the intellectual property protection to the innovation

It is possible to add the intellectual property protection (patent) to the innovation immediately in the third step of the form for adding the innovation or from the innovation profile via the "Add protection" action available under the "Security" tab. The user with the editing access to innovation data can register a protection.

Note: You can specify multiple intellectual property protections for one innovation.

5.5 Specifying the implementation data

You can specify the details of the implementation of the innovation in this company, for all related companies in the innovation profile in the "Entities" tab. You can specify here what impact the innovation had, e.g., on price, quality, availability, and environment. You can go to the implementation details view, which is available for editing, through the "Show more details" link in the list for a given company.

6 Projects

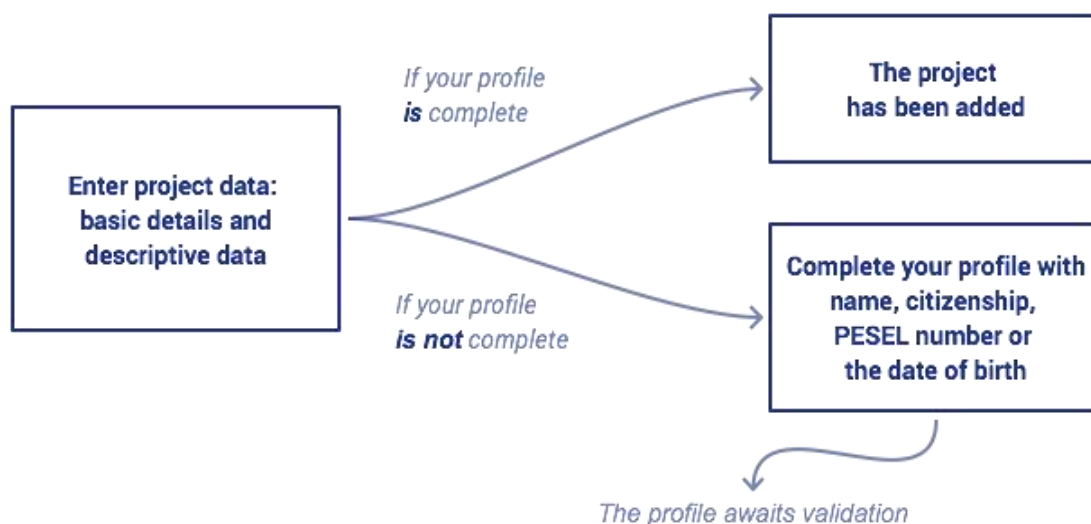
6.1 Adding a project

You can register the project (planned, completed or in progress) in the system. To do this, you can call the Add action available in:

- the projects list (+)
- the Projects tab available from the profile of a person, company or scientific institution

It is necessary to complete the form with the required data (basic data, descriptive data) and to approve the operation. The project can be supplemented with additional data at any time.

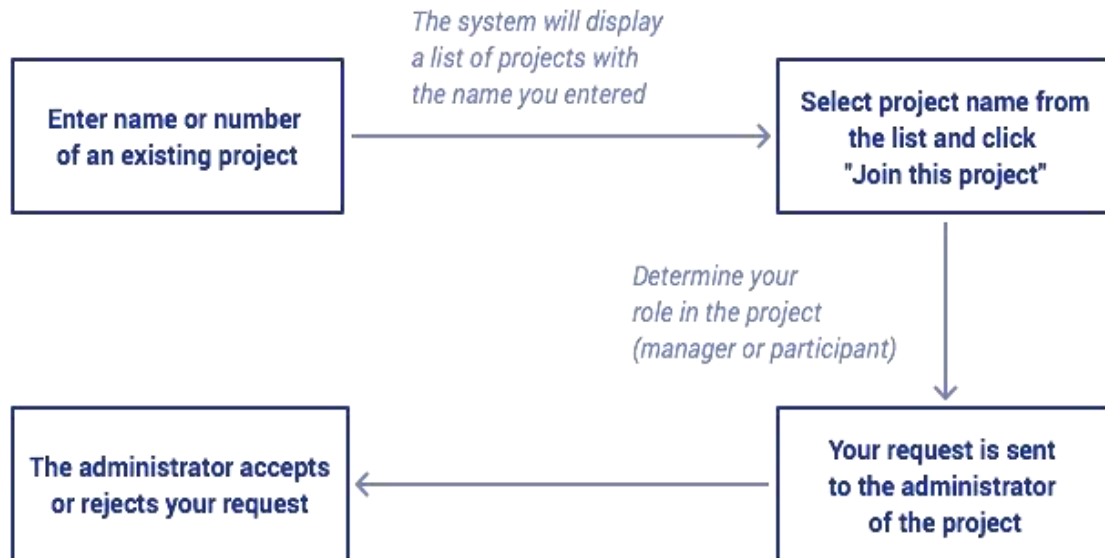
Note: You need to complete a profile, if it is not complete yet, which the Inventorum team will then validate in order to add a project. You will be notified of the validation result.



6.2 Joining to the project

You can associate yourself with the existing project in two way.

1. An attempt to associate is initiated if you enter the existing name or number of the project when adding it. In this case, the system displays an informational message that the project already exists in the database. You can select "Join to this project", in which case you will only have to determine your relationship with the project (manager or participant).



2. In the project profile is available the "Join to this project" action. In this case, the filling of the form is required. This form establishes the relation between user and project. The owner of the project must confirm this relation. After form filling, the authorization request message will be sent.

Note:

When the entity has created the association with the project as a first one, then this association is accepted automatically, and the user obtains the access to the management of project data.

7 Companies

7.1 Company profile

The company profile includes the following information:


- Basic information (REGON, NIP, KRS),
- Descriptive information
- Keywords
- Industries in which the company operates
- Information about innovative activities
- Contact information
- Related data:
 - Persons
 - Innovations
 - Projects
 - Conferences

You can view the company data and link to the company in case you are the employee of the company. However, this link requires the approval of the company administrator.

The company administrator manages the company, its data in the system and approves the links of persons with the company (more information on user permissions can be found in the chapter titled Roles and permissions in the system).

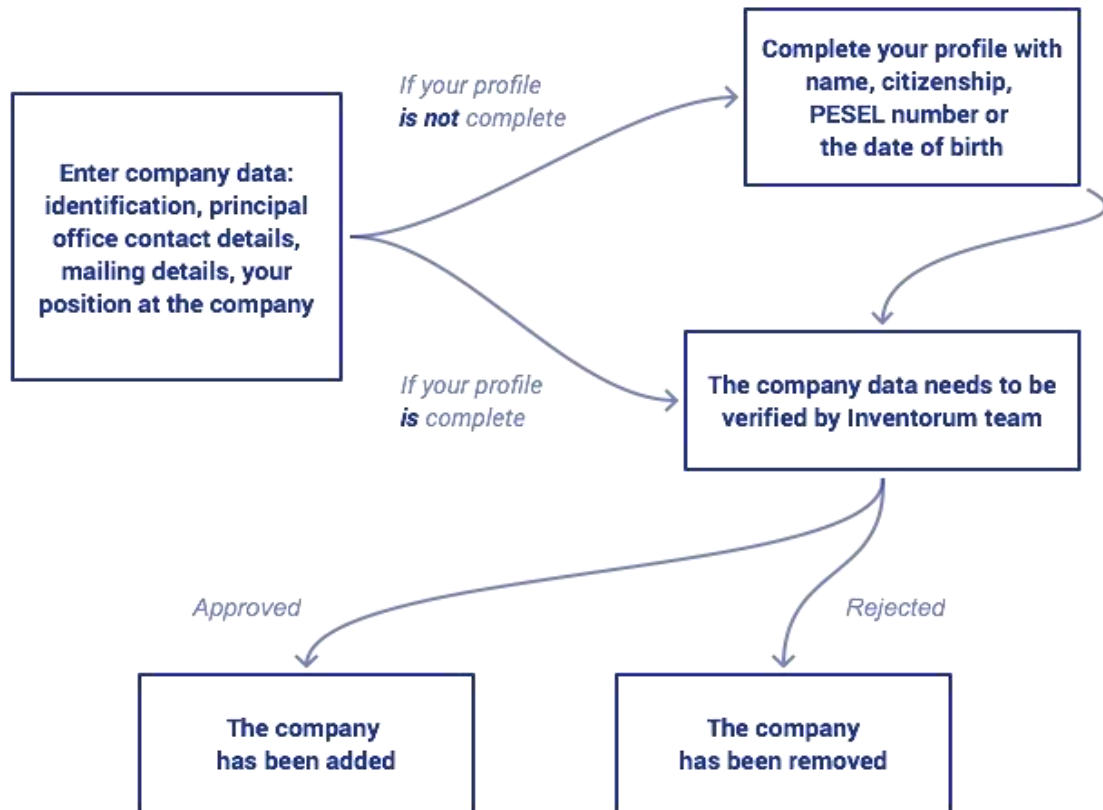
7.2 Company registration

You can register a company, which you own or are an employee thereof in the system. To do this, you must use the Add action available in:

- List of companies ()
- The Companies tab accessible from the profile of a person, company, or scientific institution

You need to complete the form with the required data (identification, principal office contact details, mailing details, position at the company) and approve the operation.

Note: You need to complete a profile, if it is not complete yet, which the Inventorum team will validate in order to add a company. The System will notify you of the validation result.



7.3 Joining to the existing company

If the company already exists in the system, a user who is its employee may link to the company. There are the following linking methods:

1. When adding a new company, the system indicates that such a company is already in the system based on the data in the form. The system also asks whether the user wants to link to it. If the user confirms, a notice will be sent to the administrator of the company with a request to accept the link.
2. In the event that the user receives an invitation from the company administrator, the user will be associated with it after its acceptance.
3. Use the "Link yourself to the company" action available from the company profile. Also, the company administrator must approve the link.

7.4 Company validation

The Inventorum team must validate each registered company. The user who registers a company becomes its administrator. The user and his/her administrator role must also be validated. The System will notify the user of the validation result.

7.5 Adding a person to the company (company Administrator)

The company administrator can add (invite) any person to the company, either the one who has already registered in the Inventorum system or the one who has not registered yet. This action is available from *Company profile > Persons tab > Add new*. After completing the form, the user receives an invitation, which he or she can accept or reject.

Note: Pending invitations addressed to the user or company, which the user is an administrator of are available by clicking on the invitations icon (👤) in the upper right corner of the screen.

7.6 Approval of a link between the person and the company (company Administrator)

Given that anyone can ask to be linked to the company (company employee) this link must be approved by the company administrator. A pending link is indicated on the system notification list (🔔), which is located in the upper right corner of the screen. Application validation requires going to *company profile > Persons tab* and confirming or rejecting the link.

7.7 Changing the permissions or position of the person in the company (company Administrator)

Company administrator can change the permissions or position of a person in the company. This action is available from *Company profile > Persons tab*. Actions Changing the permissions and Changing the position are available for each person associated with the company.

7.8 Deleting or suspending the company

The user who has the access to manage the company can suspend/unregister the company (the action is available from the company profile). In this case, it is still in the system with the appropriate information about its status. The administrator can reactivate company from the same level.

The administrator can also completely remove the company from the system (*Delete* action available from the company profile). In such a case, the related objects (projects, innovations, conferences) will be removed along with the company, unless they are linked to other companies, scientific institutions or persons.

8 Scientific institutions

8.1 Scientific institution profile

The scientific institution profile includes the following information:

- Basic data (REGON statistical number, date of establishment, and the type of institution)
- Fields of activity
- Subordinate units
- Contact information
- Related data:
 - Innovations
 - Projects
 - Conferences

The user associated with the scientific institution by means of a current employment or a function can add [projects](#), [conferences](#) and [innovation](#) to the institution. The other users can only view the data (more on user permissions, see Roles and permissions in the system).

The list of scientific institutions has been retrieved from the Polish Science system.

8.2 The association with the scientific institution

The user that is an employee of the scientific institution can associate with the registered scientific institution. There are several ways to create the appropriate association:

1. You can call the "Join to the scientific institution" action. This action is available in the profile of the scientific institution. In this case, you must select the type of association in the showed form. After that, the Administrator of the scientific institution accepts the created association.

Note:

When the user does not have a filled personal data then the appropriate form to fill it is presented.

Note:

When the scientific institution does not have any administrators then you are labeled as a potential administrator. The created association and the user role require verification by the Inventorum team.

2. The association related to the cooperation in the same project.
3. The association related to the realization of the common innovation.

9 Experts

9.1 Person's profile

The profile of the person includes the following information:

- Personal data (such as name, PESEL number, date of birth)
- Persons' documents (*)
- Keywords (*)
- Contact information
- Additional information: (*)
 - The works as a supervisor and reviewer
 - Doctorates
 - Post doctorates
 - Professorships
- Related data:
 - Innovations
 - Publications (*)
 - Projects
 - Conferences
 - Companies
 - Scientific institutions

Data marked with an asterisk (*) are available for linked accounts of Polish Science and Inventorum systems.

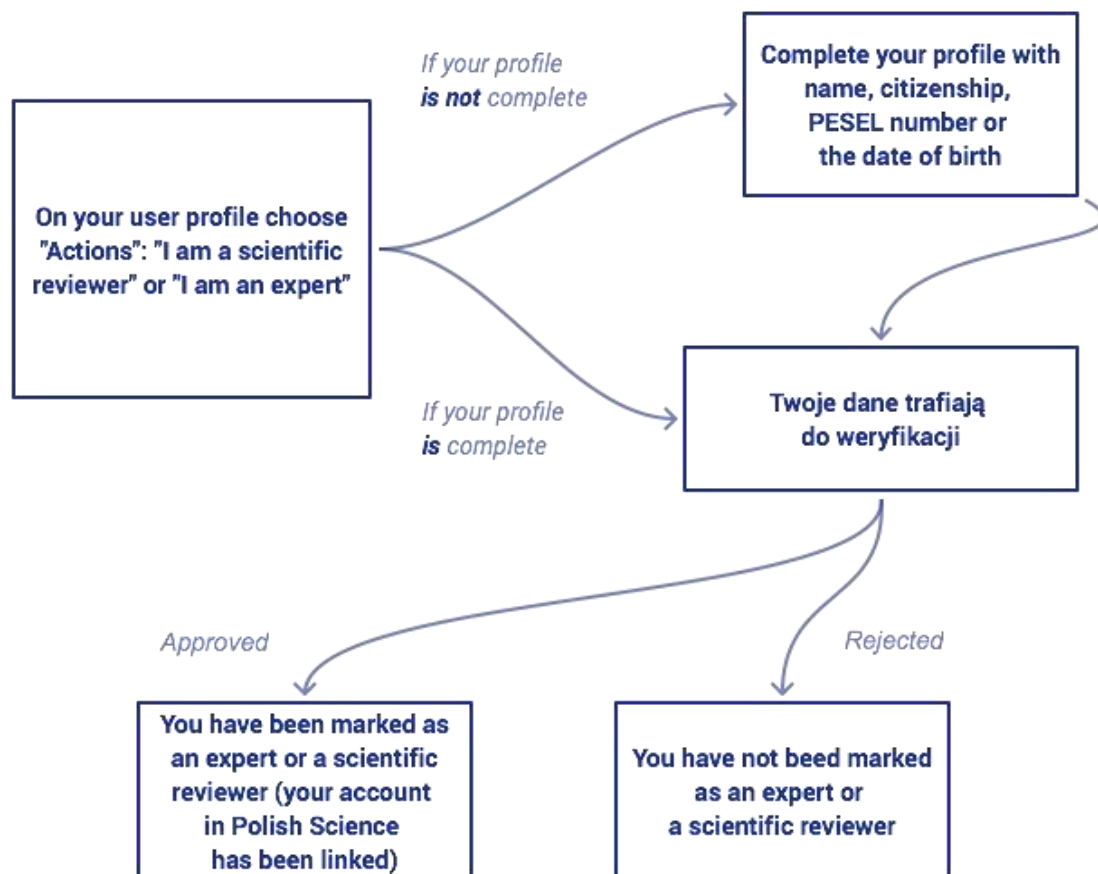
You can edit all the data as a part of your profile, provided that the personal information of users associated with the Polish Science account are subject to validation by the Inventorum employee (more on user permissions, see Roles and permissions in the system).

9.2 Marking as an expert/scientific reviewer

Each user can mark himself or herself as an expert or scientific reviewer in the system. He or she only has to do the following in his or her user profile: *I am a scientific reviewer* or *I am an expert*.

Note:

1. You need to complete a profile, which will be validated by the Inventorum team in order to be marked as an expert or scientific reviewer. The System will notify you of the validation result.
2. Scientific reviewer must have at least a PhD degree.
3. Entering the number in Polish Science enables to quickly link accounts between Inventorum and Polish Science (<http://www.nauka-polska.pl>) and automatically complete the necessary data for account that have already been entered in the Polish Science system.



9.3 Publication registration

The list of publications is synchronized with the data in the Support System for Selection of Reviewers.

You can register a new publication as the author in Inventorum. To do this, you must use the *Add publication* action in the Publications tab available from your profile. It is necessary to complete the form with the required data (basic data, abstracts, keywords) and to approve the operation.

Note: Only the users with validated data and linked to the Polish Science account (experts and scientific reviewers) can access the tab and manage the publications.

9.4 Link to the research unit (employment and functions)

Linking a person with the research unit takes place through employment or a function in that unit. Employment and function data are specified in the Polish Science system and they will be downloaded automatically during synchronization of accounts between the systems.

Note:

The Inventorum enables the creation of the non-scientific employment. You can see how can do this in The association with the scientific institution section.

10 Conferences

10.1 Conference profile


The conference profile includes the following information:

- Basic data (such as: name, industry, location, date of conference)
- Additional information (such as: conference website, the number of enrolled participants, description)
- Keywords
- Descriptive information
- Area/Field/Discipline of science
- Organizers
- Contact person
- Participants

The conference organizer can manage (edit, delete) its data. In addition to viewing the conference data, other users may apply to participate in it. However, note that this is not an official application to the conference, but telling other users that the user is going to attend (more on user permissions, see Roles and permissions in the system).

10.2 Adding a conference

You can register a conference (scientific, business, science and business) in the system. To do this, you can call the Add action available in:

- the conferences list ()
- the Conferences tab available from the profile of a person, company or scientific institution

You need to complete the form with the required data (basic data, date, location, organizer, contact person, additional details) and approve the operation.

10.3 Notification of the attendance to the conference

The logged-in user can indicate his or her participation in the conference. The action *I am going to attend this conference* is available from the conference profile. After the action, the user will be added as a conference participant.

Note:

1. Indicating the participation in the conference only means informing other users of Inventorum about the fact that the user is going to attend the conference. This is not an official application.
2. A validated user can join the conference if he or she has not yet participated in the conference and the conference has the status of Planned.

10.4 Invitation for a person to attend the conference

The conference organizer can send an invitation to participation in the conference both to those who have already opened an Inventorum account and to those who have not yet done so. Go to *profile of the selected conference > Participants tab* and select the action *Add participant* in order to add a participant. After completing the form with data (e-mail address, name, or speaker), an invitation will be sent which the user will have to accept or reject.

Note: You need to complete a profile, which will be validated by the Inventorum team in order to add a conference. The System will notify you of the validation result.