

## MindView AI Technical Specification

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## Introduction

This document provides a comprehensive and detailed technical specification for the MindView AI feature. The specification outlines key aspects such as the underlying AI model, system components, data flow, and other essential technical details required for understanding the feature.

## AI Model

MindView utilizes the Microsoft Azure AI Foundry GPT-4.1-mini model via the chat completions interface. Integration with the Microsoft Azure AI is managed through a proxy, which ensures user anonymization and allows MatchWare to control the data flow between MindView and the AI (cf. Data Flow).

## File Upload feature

MindView offers the capability to generate summaries from uploaded files. During this process, the content of the uploaded documents is temporarily extracted in the cloud as plain text and transmitted to OpenAI for analysis. Extracted data is not saved or retained at any point during this process—data is used solely for the purpose of generating the summary and is not stored by MindView or any related services. The table below outlines the supported file types and the corresponding service used for content extraction.

| Supported file types         | Conversion module  |
|------------------------------|--|
| Microsoft Word (.docx)       | Open XML SDK by Microsoft<br><a href="https://github.com/dotnet/Open-XML-SDK">https://github.com/dotnet/Open-XML-SDK</a>   |
| Microsoft Excel (.xlsx)      |  |
| Microsoft PowerPoint (.pptx) |  |
| Adobe PDF (.pdf)             | PdfPig – Open source conversion module<br><a href="https://github.com/UglyToad/PdfPig">https://github.com/UglyToad/PdfPig</a>  |
| Plain Text (.txt)            | No conversion service needed   |
| Audio File (.mp3, .wav)      | NAudio ( <a href="https://www.nuget.org/packages/NAudio/">https://www.nuget.org/packages/NAudio/</a> ) used to process the files into manageable chunks ready for transcription. Audio transcription utilizes the Microsoft Speech Service (Azure AI Speech) in the same geolocation as the service. |

Neither Microsoft nor MatchWare store or use data to train their models.

## Data Flow

The following diagrams show the infrastructure, routing architecture and data flow. MatchWare uses Microsoft Azure which is a cloud computing platform and infrastructure created and managed by Microsoft.

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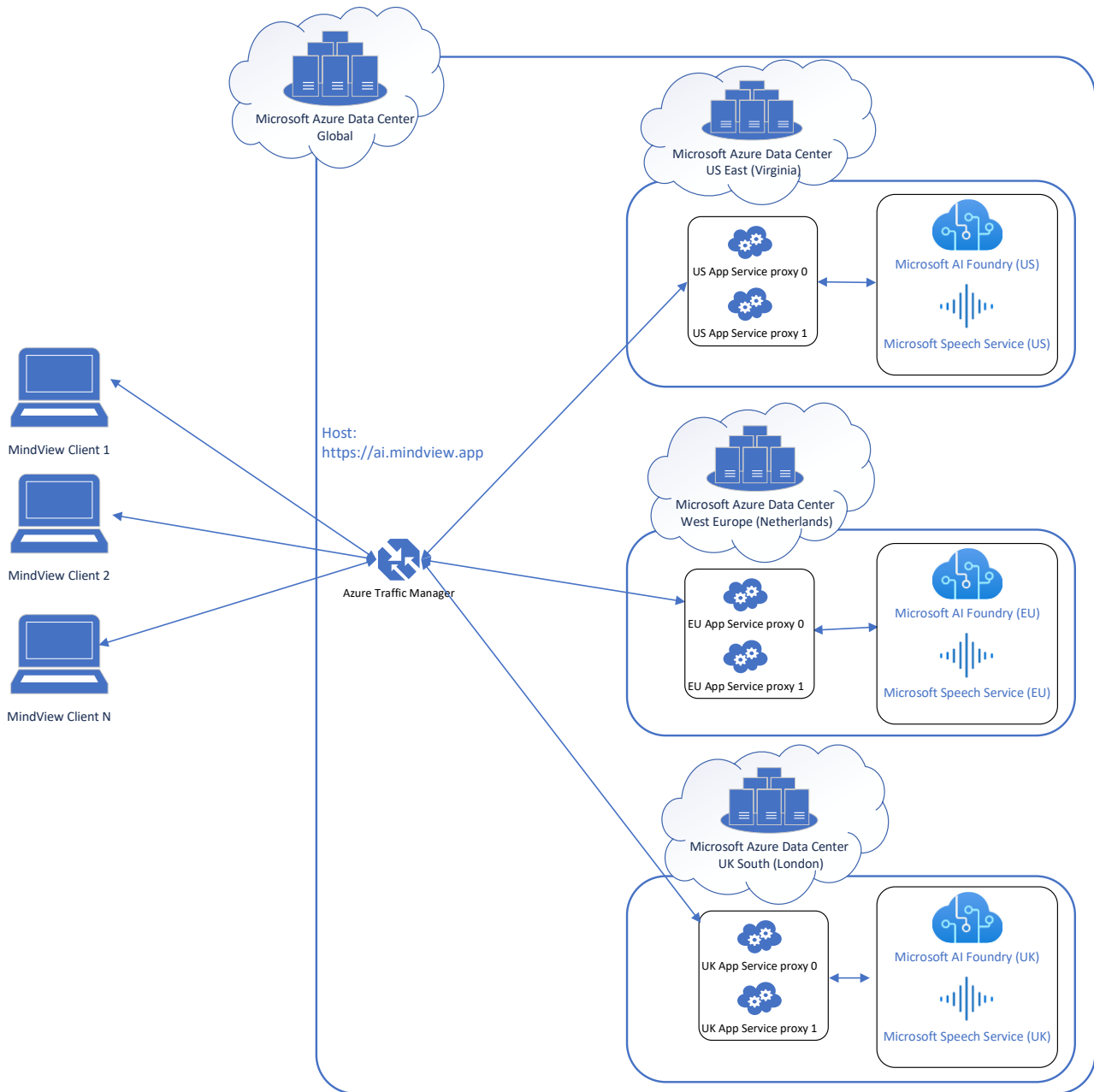


Figure 1 - Overview of the infrastructure and the routing architecture

The MindView client uses the nearest web service based on its location. This setup is handled by Microsoft Azure Traffic Manager. The Azure Traffic Manager uses the geographic location of the user to connect them to the appropriate web service proxy, the AI Foundry and the Microsoft Speech Services based on their region. The geolocation-based routing ensures efficient connectivity and maintains local data compliance.

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Here is an overview of the geolocation mapping to Work Units:

| User Geolocation                                    | Datacenter location       |
|---|---------------------------|
| North America<br>South America<br>Australia/Pacific | East US (Virginia)        |
| UK<br>Ireland                                       | UK-south (London)         |
| EU, World   | Europe-west (Netherlands) |

The sequence diagram below illustrates the step-by-step process when the AI command is activated.

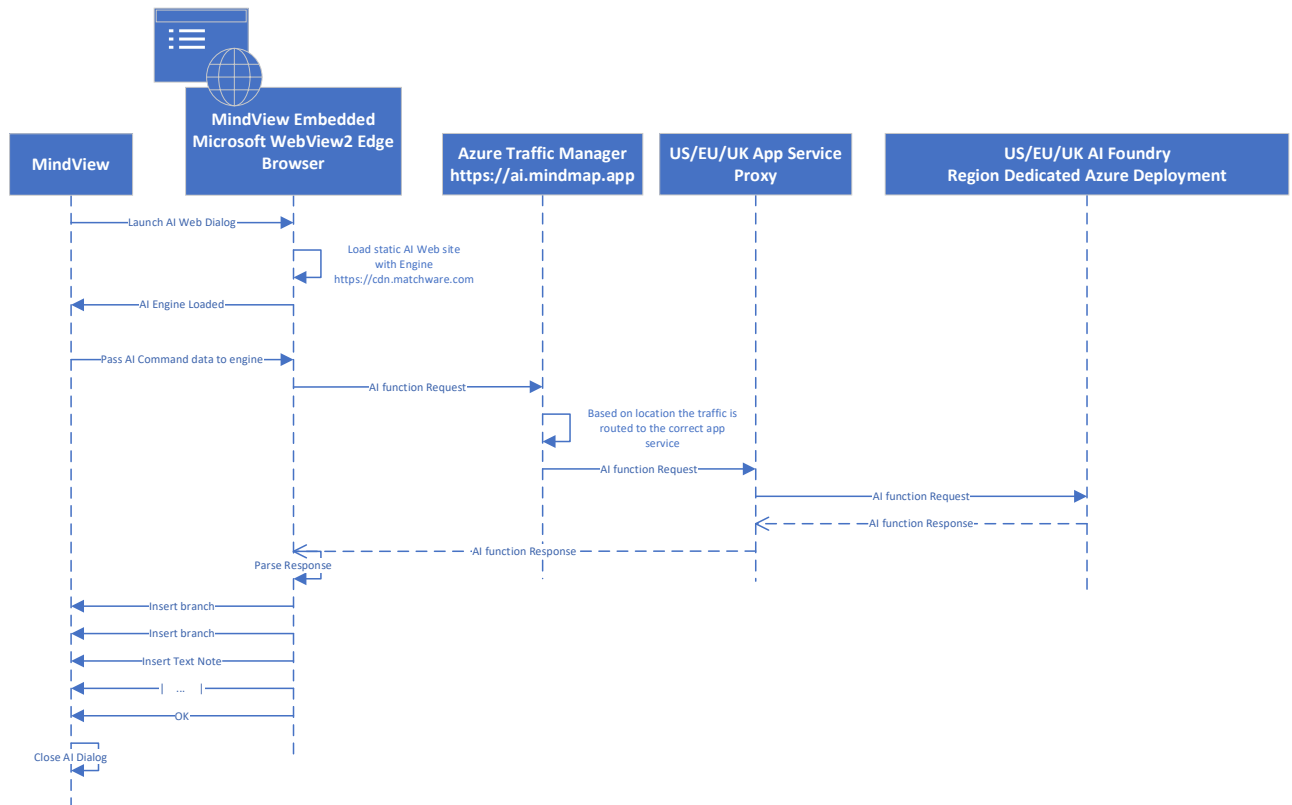


Figure 2 – Sequence diagram showing the flow when running the AI tool

## Data sent to AI

By default, only the selected topic title or text editor note is sent to the AI. For specific prompts, all topic titles in the current document may be sent to improve content awareness. Below is a summary of commands and the data sent to the AI.

| Command      | Data sent to AI |
|--------------|-----------------|
| AI Assistant |                 |

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|                         |   |
|-------------------------|---|
| Prompt tab              | A user-submitted prompt is provided, either via manual keyboard input or through real-time dictation using Microsoft Speech Services. No additional information is transmitted to the AI. |
| Files tab               | The file tab converts uploaded files to plain text and only sends that text to the AI.  |
| <b>Create Topics</b>    |   |
| Brainstorm              | Selected topic title  |
| Topics                  | All topic titles  |
| Questions               | All topic titles  |
| Pros/Cons               | All topic titles  |
| <b>Create Text Note</b> |   |
| Definition              | All topic titles  |
| Synopsis                | All topic titles  |
| Abstract                | All topic titles  |
| <b>Translate</b>        |   |
| All translations        | Selected Text   |
| <b>Edit Text</b>        |   |
| Fix Grammar             | Selected Text   |
| Rephrase                | Selected Text   |
| Simplify                | Selected Text   |
| Expand                  | Selected Text   |

NB. Please note that this information is subject to change.

## Enable/Disable AI

The AI functionality is enabled by default for licensed users. The AI functionality can optionally be disabled either by the admin from the MatchWare Accounts portal settings

(<https://accounts.matchware.com/AccountInformation/Settings>) or by installer settings:

[MindView Windows Technical Specification](#)

[MindView MAC Technical Specification](#)

## Custom AI integration

### [MindView Windows Only]

MindView can be adjusted slightly if the current configuration does not meet your requirements.

**This customization process involves technical steps and should only be undertaken by individuals who are knowledgeable about the relevant concepts.**

Please note that this information is subject to change.

## Custom OpenAI API key

By default MindView will use the MatchWare AI proxy endpoints (cf. Data Flow) but it is possible to use a custom OpenAI key. When using a custom API key MindView will contact the OpenAI API directly without reaching the MatchWare proxy.

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Note: The AI Assistant file upload offers limited functionality when a custom API key is used.

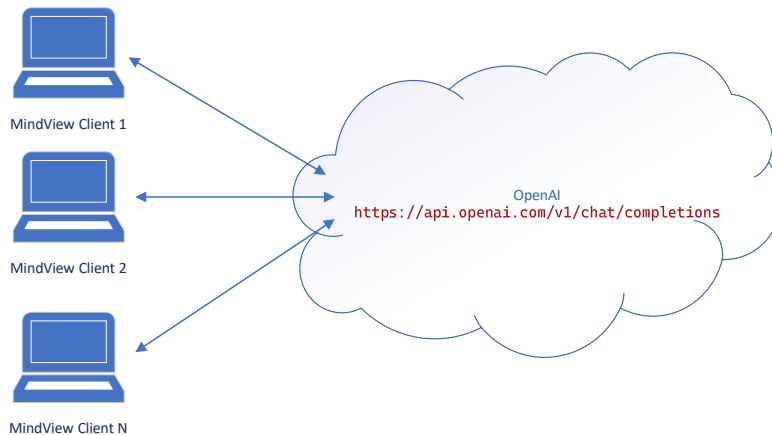


Figure 3 - When using a custom OpenAI API key MindView contacts OpenAI directly

Add your own OpenAI API key by editing the Windows Registry. This can either be done with the Windows Registry Editor or from the command line.

#### Add for Current User Only:

[Registry Editor]

[HKEY\_CURRENT\_USER\SOFTWARE\MatchWare\MindView 9.0\AI]

"AIOpenAIAPIKey"="<Custom OpenAI API Key>"

From Command Prompt (Run as Administrator)

```
reg add "HKCU\SOFTWARE\MatchWare\MindView 9.0\AI" /v AIOpenAIAPIKey /t REG_SZ /d "<Custom OpenAI API Key>" /f
```

#### Add for All Users:

[Registry Editor]

[HKEY\_LOCAL\_MACHINE\_USER\SOFTWARE\MatchWare\MindView 9.0\AI]

"AIOpenAIAPIKey"="<Custom OpenAI API Key>"

From Command Prompt (Run as Administrator)

```
reg add "HKLM\SOFTWARE\MatchWare\MindView 9.0\AI" /v AIOpenAIAPIKey /t REG_SZ /d "<Custom OpenAI API Key>" /f
```

### Custom OpenAI endpoint

MindView has the ability to connect to a self-hosted OpenAI. This solution is suitable for companies that are required to either control the data or use a customized AI model.

Note: The AI Assistant file upload offers limited functionality when a custom API key is used.

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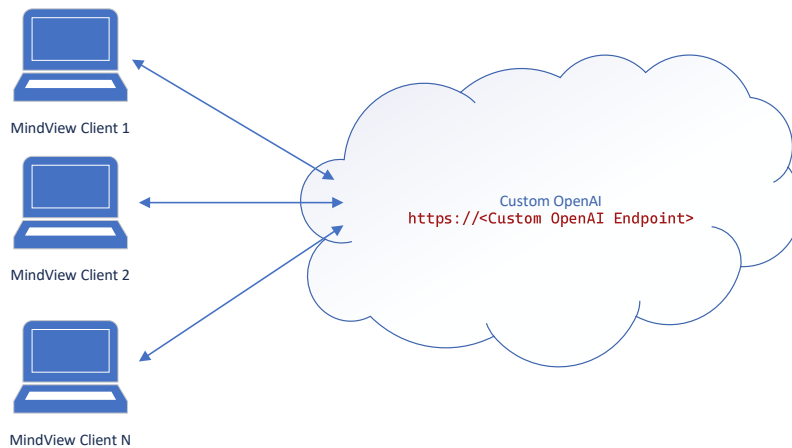


Figure 4 - It is possible to use a custom OpenAI endpoint

The following example shows how to create a custom OpenAI using the Microsoft Azure AI Foundry.

1. Navigate to Azure AI Foundry (<https://ai.azure.com>)
2. Create a new project or use an existing one
3. From the Model catalog find the GPT-4o mini model and "Deploy"
4. Go to Models + endpoints and open the gpt-4o-mini endpoint
5. Copy the "Target URI" and the "API Key" to be used in the MindView settings
6. Follow the above settings for entering "Own OpenAI API key" and use the below settings to point to the custom Target URI

#### Add for Current User Only:

[Registry Editor]

```
[HKEY_CURRENT_USER\SOFTWARE\MatchWare\MindView 9.0\AI]
"AIOpenAIEndPoint"="<Custom OpenAI Endpoint>"
```

From Command Prompt (Run as Administrator)

```
reg add "HKCU\SOFTWARE\MatchWare\MindView 9.0\AI" /v AIOpenAIEndPoint /t REG_SZ /d "<Custom OpenAI Endpoint>" /f
```

#### Add for All Users:

[Registry Editor]

```
[HKEY_LOCAL_MACHINE_USER\SOFTWARE\MatchWare\MindView 9.0\AI]
"AIOpenAIEndPoint"="<Custom OpenAI Endpoint>"
```

From Command Prompt (Run as Administrator)

```
reg add "HKLM\SOFTWARE\MatchWare\MindView 9.0\AI" /v AIOpenAIEndPoint /t REG_SZ /d "<Custom OpenAI Endpoint>" /f
```

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