

PatDocs Guide

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About PatDocs

PatDocs is a bespoke document service, developed by Minesoft to help patent professionals to find, analyse and order patent documents. PatDocs has many innovative features that help support key activities in prosecution, such as Family Tree Mapping, Auto-Populate IDS Forms and Sharable Legal Reports.

Getting Started

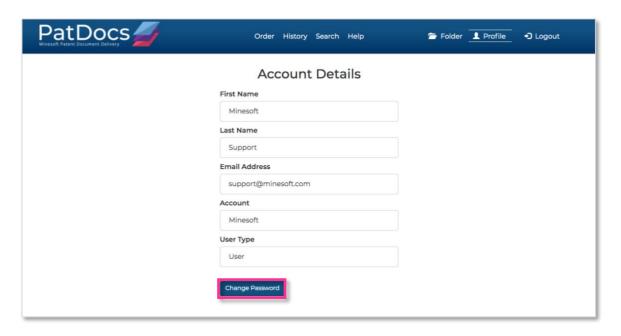
Login

Go to the secure PatDocs log-in page https://www.patdocs.com/ and enter your user ID and password.



Changing your password

When logging in for the first time, we recommend changing your password. To do this, once logged in, select "Profile" and then select "Change Password" at the bottom of the page.



You will need to enter your old password, then enter and confirm your new password.



Order

Entering numbers in the correct format

Enter your numbers into the relevant box for your desired order type. The numbers should be entered one per line.

Example:

US9656952B2 US20090048103A1

The numbers themselves should contain no spaces. Separating kind codes with a space is not recommended but is still valid input.

Example:

US20050229734A1 is correct US20050229734 A1 is correct but not recommended.

You can also enter US serial numbers.

Example:

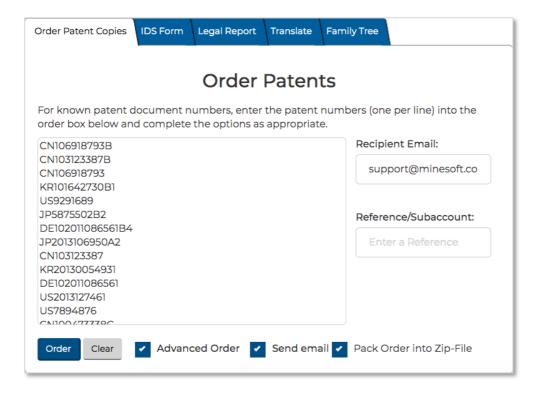
07/395464 09/373089

The patent numbers returned are what will be saved to your "Order History".

The default recipient of the documents will be the current user's email. If you don't want to change this, you do not need to do anything. However, if you wish to alter the recipient, simply re-enter the email in the appropriate box in the "Recipients" tab on the right-hand side of the page.

For most accounts, a reference for your order is optional; however, if you wish to enter one to help identify your order in the history page, then you can do so using the appropriate input located in the "Recipients" tab on the right-hand side of the page.

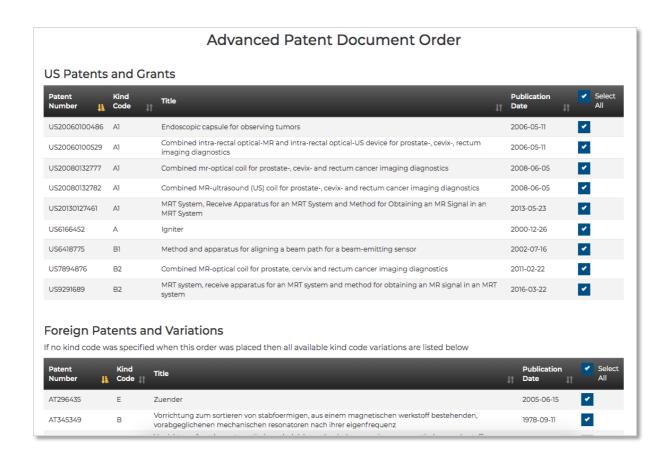
Order Patent Copies



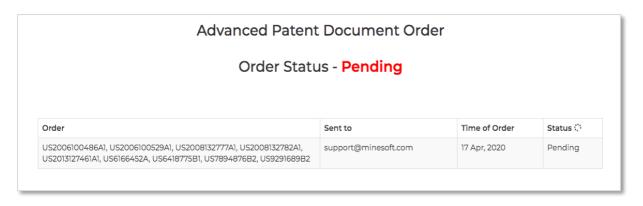
For document orders, there is an option on the right-hand side of the page in the form of a checkbox to include a zip file containing all of the documents ordered - on top of the list of links to the PDF files sent by default.

Once you are set to order, you can preview the patents you want to order by checking the "Advanced Order" checkbox; or skip this step and directly order the documents.

The "Advanced Order" page will simply allow you to confirm the documents that you wish to order using checkboxes.

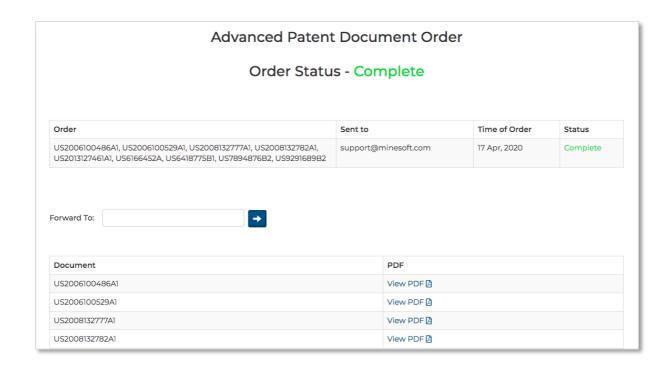


On submitting your order, you will be redirected to a page displaying the status of your order. This page will automatically refresh every few seconds until the order is complete.



This status page permits viewing the documents as they come in.

When the status changes to "complete", you will soon receive an email containing links to all of the documents, as well as a zip file of them if you selected that option.



From the status page you can directly forward these links to any email address. This page is also accessible from the history page, so you don't need to wait around for the order to complete and you can come back to and view this order at any time.

Generating the front page of patent copies

On submitting your normal document order, you will be redirected to a page displaying the status of your order. This page will automatically refresh every few seconds until the order is complete.

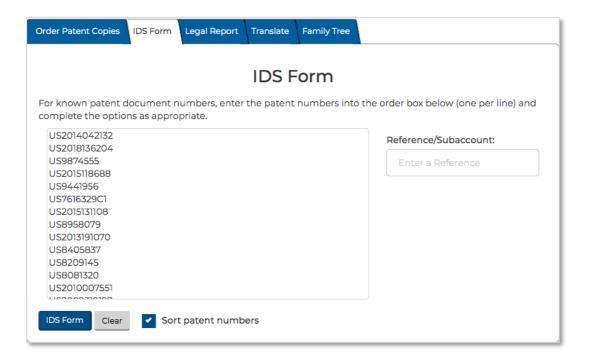
Once complete, at the bottom of the page you will have three options:

- 1. Complete PDFs (ZIP) Downloads the full copy of all ordered documents and puts them in a zip file.
- 2. Front Pages Only (ZIP) Downloads only the first page of each patent and saves them as individual PDFs.
- 3. Front Pages (as one PDF) Downloads only the first page of each patent and saves them all into one single PDF file.

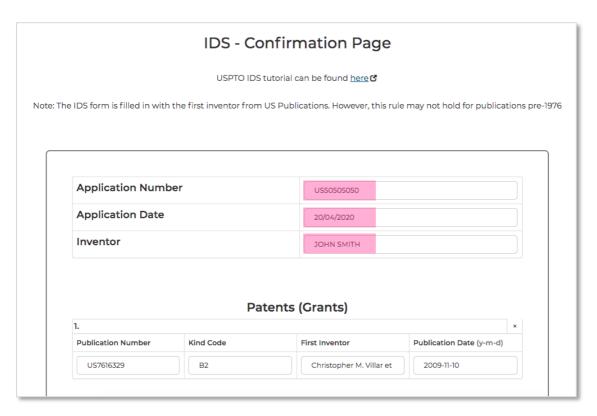


Generating an IDS Form

To generate an auto-complete IDS form, go to the "IDS Form" tab and enter the relevant patent numbers in the order box.



On submitting the numbers you want to use in your IDS form, you will be redirected to the IDS Confirmation Page.

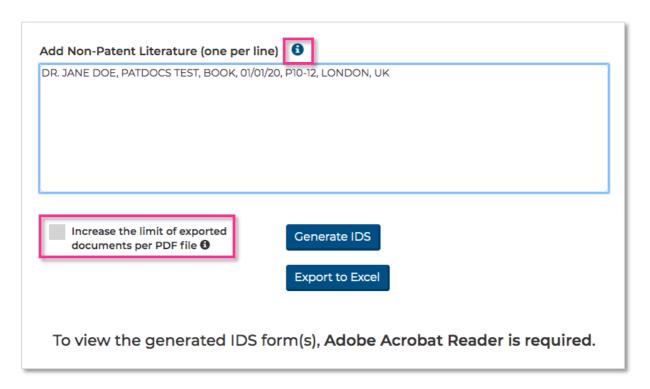


Here, you can enter an application number, application date and inventor. These are optional.

Your numbers will be listed in order of: US grants, US application publications, followed by any foreign patents.

This page will display the numbers found along with their kind code, first inventor and publication date. All of these fields are editable.

Scroll down below the numbers to will find a Non-Patent Literature (NPL) text area input. Here, you can enter up to 50 NPL references, one per line. The correct input format for NPL can be found on the USPTO website and is also shown when you hover the cursor over the information symbol next to the title of the "Add Non-Patent Literature" section.



If required, all information on this page can be exported to an Excel document by clicking "Export to Excel".

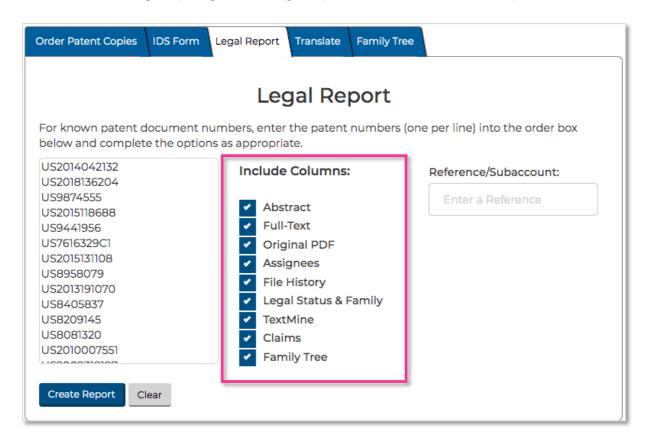
Any numbers not found will be listed at the top of the page. They will still be included in the format they were entered; however, the Publication Number will be the only filled in field.

Once you are happy with your form, click on the "Generate" button. This will open up a new tab (so you can leave the confirmation page while the form is generated) and will download the PDF of the IDS form and close that tab when complete.

Please note, that to view the resulting PDF, Adobe Acrobat Reader is required.

Custom legal reports

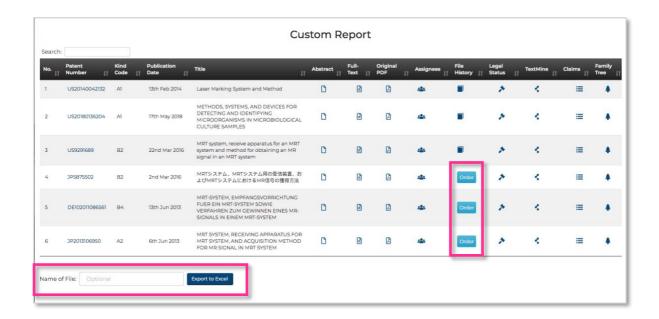
To create a custom legal report, go to the "Legal Report" tab and enter the relevant patent numbers.



Next to the number input box, there is a list of checkboxes. These are the options for the columns that you may include in your custom report.

The report will only include the columns that you have selected and will provide a table of links to all of the options you request.

Click "Create Report", PatDocs will generate a report table with links to all of the columns that were requested.



For US file histories that PatDocs has not found and foreign File Histories, there will be a button instead of a link in the relevant column. This will open a pop-up window to order these file histories through Tempus IP. Ordering files in this manner will be subject to a fee.

If you want to download the report, you can provide an optional custom file name below the results and then click on the "Export to Excel" button.

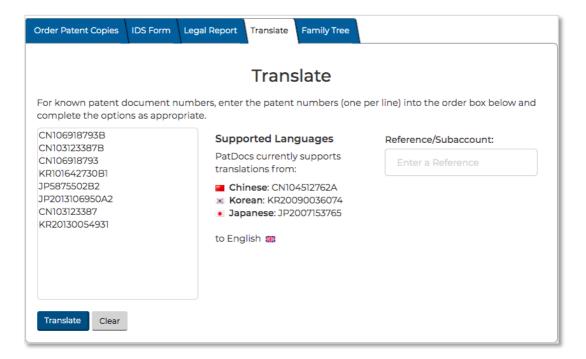


If you are exporting a large report, once you press the "Export to Excel" button, a tab will open (so you can leave the results table page if you want) and once PatDocs has finished generating the Excel file it will automatically download and close that tab.

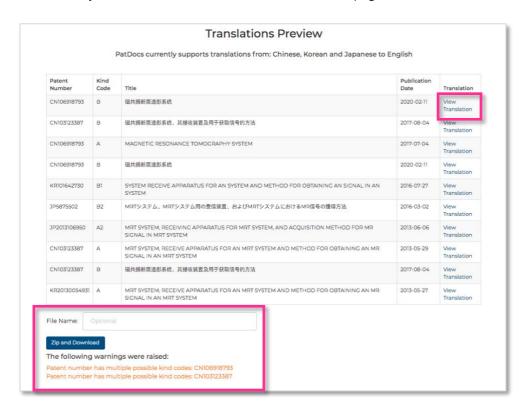
If you want to share that Excel file to non-PatDocs users, the links within the file will still work.

Ordering Translations

To order translations, go to the "Translate" tab and enter the patent number(s) of the Chinese, Korean or Japanese documents that you need translated into English.



Click "Translate" and you will be taken to the Translations Preview page.



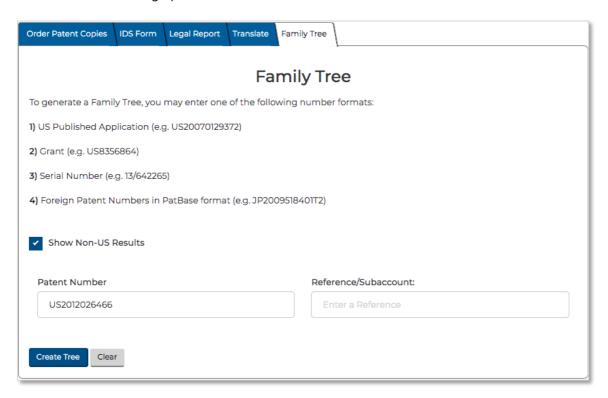
If a translation is not found, it will not be in the table on this page and we will list the numbers unavailable below that table.

If you want to download these translations, you have the option to provide a file name below the preview table. Or, you can click to view each translation individually.

Please note, these are machine translations, not human translations.

The Family Tree

To generate a family tree, you will need to enter a US published application number, a grant number, a serial number or foreign patent number in a PatBase number format and then click "Create Tree".



Please note, an example of the correct format for each number is shown. For instance, when entering a serial number, you will need to include a forward slash "/"

Settings

The "Settings" bar at the top of the screen can be used to control the layout and display of the Family Tree. Toggle "Layout Settings" to find the best way to visualise the Family Tree.



You can play around with the content of the Family Tree by changing the "Display Options" and by filtering the Tree by date using the "Timeline Filter". In addition, you can filter by patenting authority by clicking the button on the bottom left, titled "Filter by authority".

Any changes made to the settings can be reset by clicking the "Reset Settings" button.

You can hide the "Settings" area by clicking on the icon in the centre of the page below the Settings area.

Export/share options

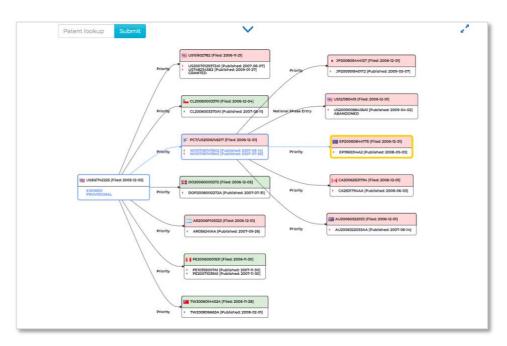
The Family Tree can be exported in various formats by clicking on the "Export" button, found in the button group in the top-right of the Settings area.

Alternatively, you can publish a link to the page by selecting "Share", which can then be shared with anyone.



Family Tree

To zoom in and out of the Family Tree, use the scroll-wheel on your mouse while the pointer is in the Family Tree area.



To reposition yourself within the Family Tree, click anywhere in the Family Tree area and drag your mouse to move around.

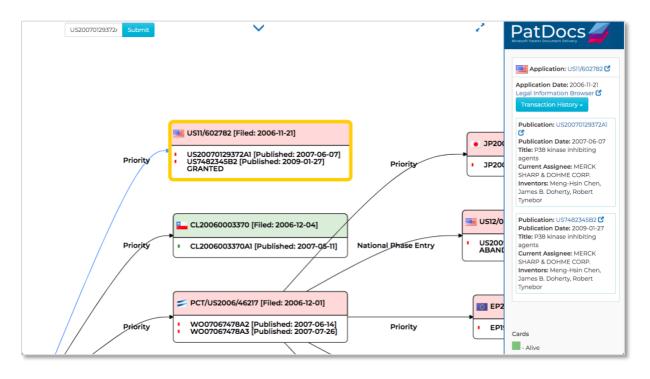
To highlight paths within the Family Tree, click on a card to highlight all of that patent's parents and children. You can hide the unselected via the Settings area.

To hide the sidebar and settings area, click on the icon in the top right-hand side of the Family Tree area.

To find a specific family member, use the "Patent Lookup" search bar at the top of the family tree. As you enter the publication number, suggestions will be shown underneath the search bar.



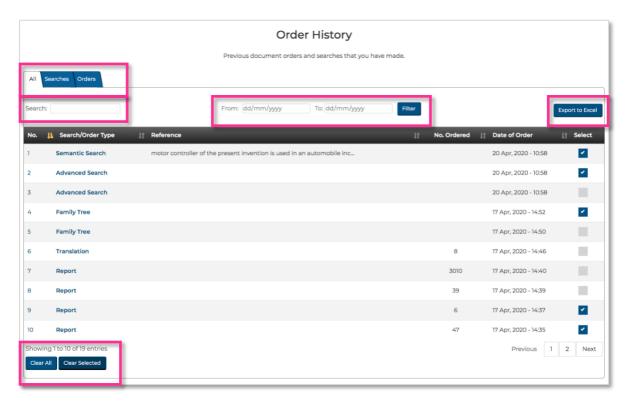
When you click on a member of the family, more information will be show on the right-hand side.



This includes a link to the PAIR data in PatDocs for this member, a link to the legal information browser, a dropdown showing the full clickable transaction history, a link to the full text of the document in PatDocs, alongside the bibliographic information for the family member.

History

The "Order History" lists all document orders and searches that you have made. This is searchable by "Search/Order Type", "Reference" or "No. Ordered" and can be filtered by date. There are tabs at the top to choose between showing previous searches, orders or all.



You can export your full "Order History" by clicking the "Export to Excel" button at the top-right of the page.

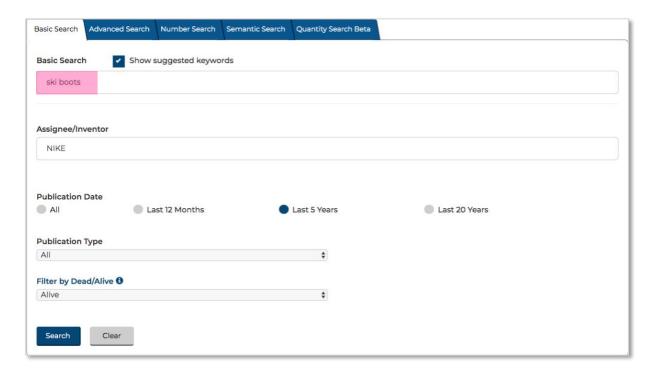
Use the checkboxes under the "Select" column to clear selected orders/searches, by clicking the "Clear Selected" button. Or you can clear all by clicking the "Clear All" button. Both are located in the bottom left of the page.

Search

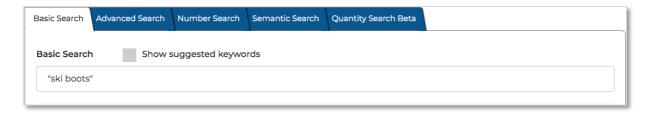
There are 5 different types of searches in PatDocs: "Basic Search", "Advanced Search", "Number Search", "Semantic Search" and "Quantity Search". In PatDocs, you can search across all US patent documents, dating back to 1790, data in PatDocs is updated daily.

Basic Search

The "Basic Search" offers a fast and simple way to run a keyword and/or assignee/inventor search in PatDocs.

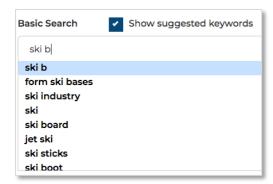


The keyword search above would find patents that contain the words "Ski" and "Boots". Stemming is automatically applied so PatDocs will also search for English grammatical variations of words wherever possible, for the word "Ski", PatDocs will find: "Ski", "Skis", "Skiing" etc.



The keyword search above uses quotation marks so the keywords will be found only when they appear together. So, this search will only find documents that contain the exact phrase "ski boots".

If you tick the checkbox above the keyword input box, titled "Show suggested keywords". As you type the keywords into the search bar, PatDocs will auto-suggest keywords.



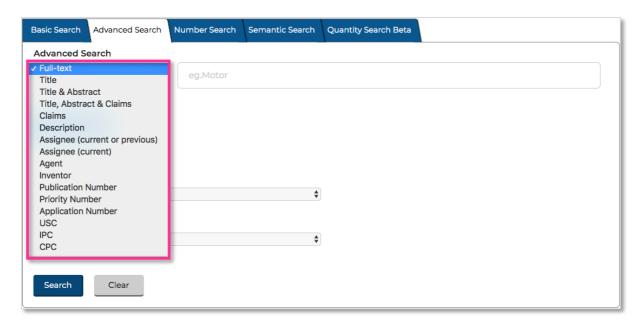
This is done automatically in the "Assignee/Inventor" field.

As well as keyword and assignee/inventor fields, you can also narrow down a search by publication date, publication type and whether or not the family is dead (all members of the family are dead) or alive (at least one member of the family is alive).

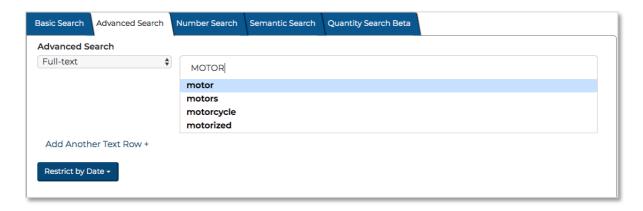
Advanced Search

The "Advanced Search" form allows search criteria to be easily combined using dropdown menus with various Boolean operators "AND", "OR" and "NOT".

Begin by choosing what area of text or bibliographic information you want to search from the dropdown menu next to the search bar.



As you start filling out the field, PatDocs will auto-suggest similar terms.



You can also combine the Boolean operators within the fields, for example "MOTOR **AND** VEHICLE". Select "Add Another Text Row" to continue adding and combining fields. As you add new text rows you will be given the option to combine these by the Boolean operators "AND", "OR" or "NOT".

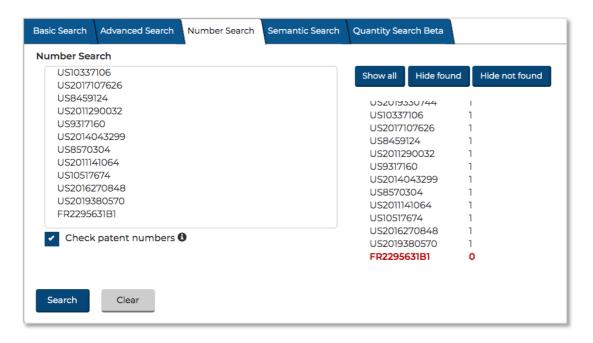
To restrict by date, select the "Restrict by Date" button. It's possible to filter by publication or application dates. Choose whether to search by date range or by an exact date and then input in the field below.



The final options on the "Advanced Search" form are to select a publication type and filter by whether the publication is dead or alive. The definition for a patent being alive is whether the expected expiration date of a patent is in the future. A patent's expected expiration date is determined from its expected term length, taking into account patent term adjustment (PTA) days. This date is truncated if the patent expires e.g. due to non-payment of fees, or the application is abandoned.

Number Search

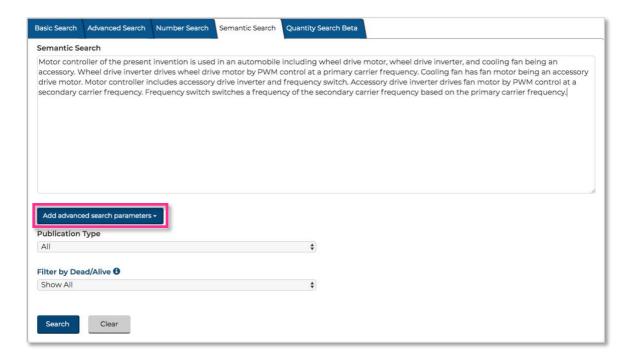
The "Number Search" offers a fast way to find patent numbers within PatDocs, you can search by publication number or application number. Multiple numbers should be separated by a line break.



Selecting the "Check patent numbers" checkbox will show a list of the entered patent numbers on the right-hand side, showing how many documents have been found for each patent number.

Please note, as PatDocs only hosts US documents any foreign numbers entered will not be found.

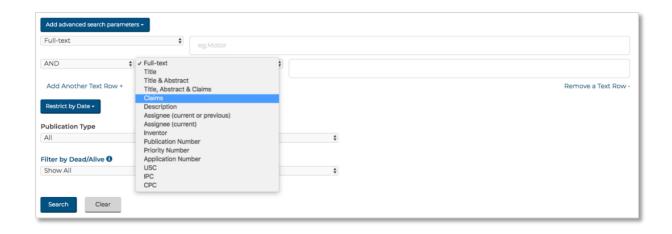
Semantic Search



Semantic search is a data searching technique in which a search query aims to not only find keywords, but to determine the intent and contextual meaning of the words a person is using for a search. It offers a way to quickly find similar patents to the search criteria.

Enter or paste the required text into the box and press "Search". The Semantic Search will pull out key terms from the entered text, removing stop-words and common words such as "method" and "process".

To add additional search parameters, select "Add advanced search parameters" underneath the text input box. This section will work the same as the "Advanced Search" form, where you can select the area of text or bibliographic information and then add multiple fields combining with Boolean operators.

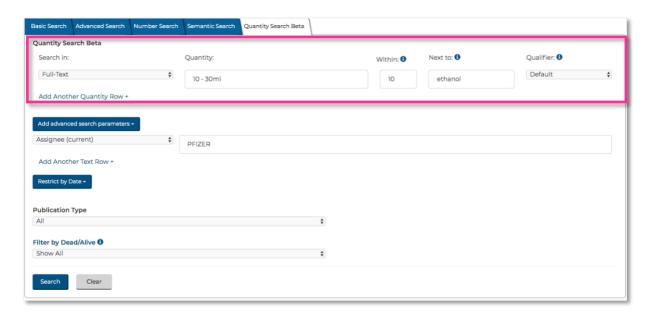


You can also restrict by date by selecting "Restrict by Date".

The final options on the "Semantic Search" form are to select a publication type and filter by whether the publication is dead or alive.

Quantity Search

The "Quantity Search" form can be used across the entire full text and allows you to specify quantities and combine this with an advanced search.



Enter the quantity you want to search into the quantity input box, the example above specifies 10 – 30ml.

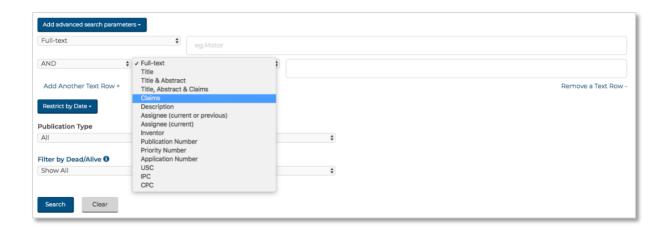
The "Within" and "Next to" input boxes allow you to specify the proximity to another quantity or keyword(s). For example, the example above specifies that the quantity (10 – 30ml) must be stated within 10 words of "ethanol".

The "Qualifier" column essentially allows you to select how "narrow" or "broad" your results are:

- The **Default** qualifier finds all quantities that overlap with the quantity in a query. So, the example above would flag "over 5ml" or "under 500 litres"
- The **Bounded** qualifier excludes matches of the form greater than/less than X. So, the example above would flag "10 60ml", "0.5oz" or "5ml to 25ml".
- The **Exact** qualifier excludes matches to ranges. So, the example above would flag "10ml", "0.34oz", "12ml" and so on... but not "10ml 20ml".

You can add multiple quantities by selecting "Add Another Quantity Row".

To add additional search parameters, select "Add advanced search parameters" underneath the text input box. This section will work the same as the "Advanced Search" form, where you can select the area of text or bibliographic information and then add multiple fields combining with Boolean operators.



You can also restrict by date by selecting "Restrict by Date".

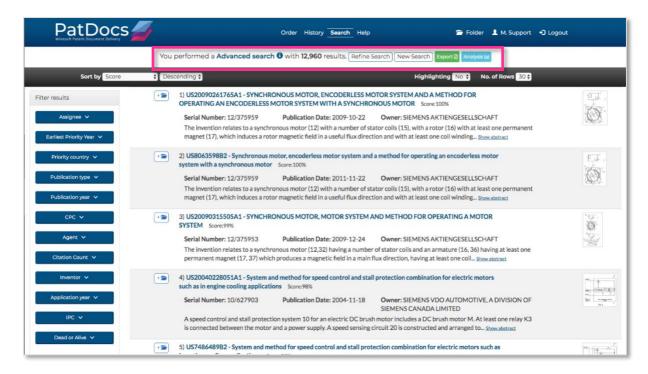
The final options on the "Quantity Search" form are to select a publication type and filter by whether the publication is dead or alive.

Viewing search results

Results page

Regardless of which search form you use, the results page is displayed the same. At the top of the page, you'll see the total number of results. There are options here to "Refine Search", start a "New Search", "Export" search results or go to an "Analysis".

To view the search query, click on the I button next to the type of search along the top of the page.



It's possible to sort the results by "Score" which refers to the score or the relevance of each hit. The score for each publication is located next to the title. Results can also be sorted by application or publication date.

Choose whether you want to have the automatic highlighting off or on and how many rows (i.e. number of publications) to display.

Please note, if you turn on highlighting the record on the results page will show an excerpt from the full text of the publication which is most relevant to your query, not necessarily the abstract.

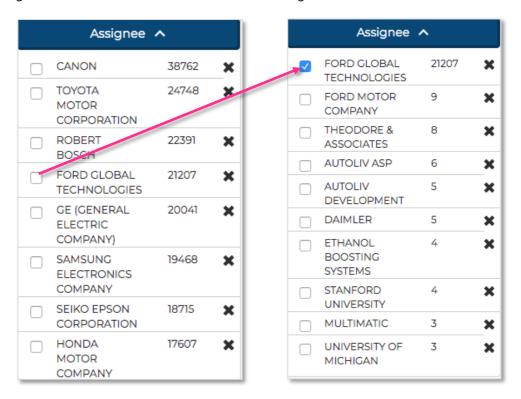


Each hit will display the publication number and title and the "Score". Also, the serial number, publication date, owner (i.e. assignee), excerpt from the abstract and drawing.

Filter results

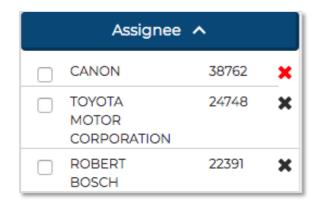
It's possible to filter your results by "Assignee", "Earliest priority year", "Priority country", "Publication type", "Publication year", "CPC", "Agent", "Citation Count", "Inventor", "Application year", "IPC" and/or "Dead or Alive". You have the option to include or remove specific assignees, classification codes, inventors etc.

Using the example of filtering by assignee (this can be repeated for the other sections), to select a specific assignee to review, tick the checkbox net to the assignee name.



This will filter the result set; you can then narrow this down further by removing or selecting a different assignee name.

To remove an assignee name, select the cross next to the name you want to remove. The cross will then be shown in red, so you know this assignee has been removed from the result set.





The filter by year (priority, publication or application) options work differently.

You'll see a graph showing the distribution of patents in the result set by year and you can drag along bar at the bottom to select your date range. Like so:

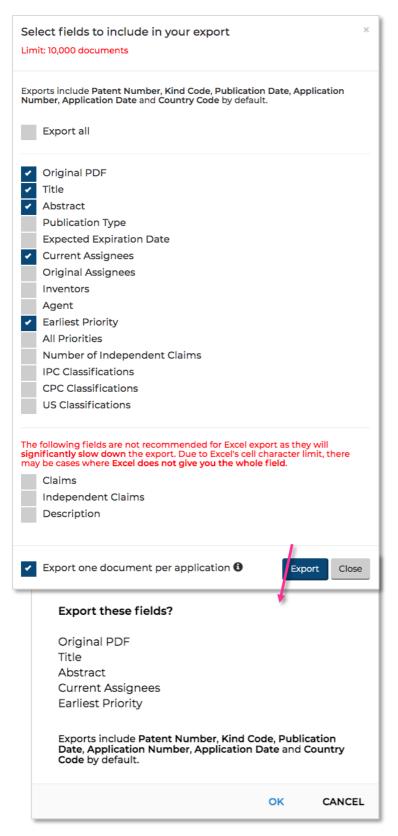


Select "Remove filters" at the bottom of "Filter results" to remove all filters.

Export results

To export your search results as an Excel file, select the "Export" button at the top of the results page.





A pop-up window will open where you can select what fields to include in your export.

By default, all exports will include patent number, kind code, publication date, application date, application number and country code.

You can select all fields by ticking the "Export all" checkbox or select fields individually in the list below.

It's possible to export claims, independent claims and descriptions but this is not recommended as it will significantly slow down the export and due to Excel's cell character limit, there may be cases where Excel does not give you the whole field.

There is an option to merge publications by application number, this will avoid repetition for a more concise export. It also means there will be a couple of extra columns to indicate the earliest publication number/date for the application in question.

Please note, there is a limit of 10,000 documents that you can export at one time. If your result set is larger than 10,000, it will take the first 10,000 documents according to your specified sorting order.

Please note, if exporting more than 1,000 documents with full text fields (i.e. claims, independent claims and description) then the export will be a zip file of multiple spreadsheets each listing up to 1,000 documents.

Once you've selected the fields, click the "Export" button and you'll be taken to the next page to confirm the fields that you've chosen. Click "OK" if these fields are correct. Once your fields have been chosen, PatDocs will remember the selection the next time you run an export.

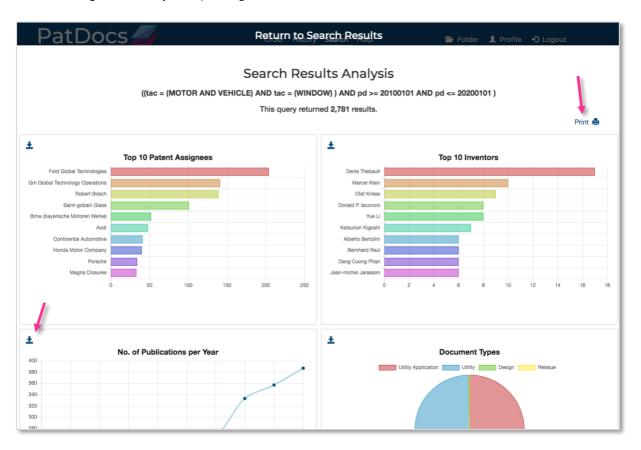
A new tab will open showing the progress of your download. This means that you can continue with other work on PatDocs while the export is downloading.

Analysis

To view an analysis of your result set, select "Analysis" at the top of the results page.



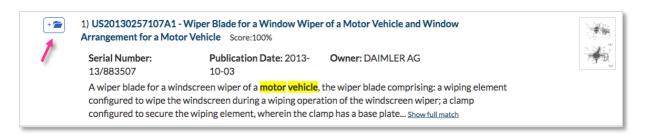
The graphs shown under analysis include "Top 10 Patent Assignees", "Top 10 Inventors", "No. of Publications per Year", "Document Types", "Top 10 CPC (Subclass)", "Top 10 IPCs", "Priority Country", "Current Assignee Country", "Top 10 Agents" and "Dead or Alive".



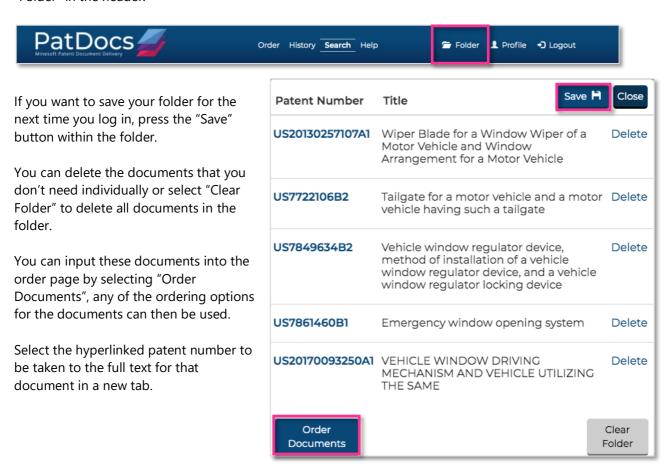
To share the graphs, there is an option to print the entire page at the top right hand corner. Alternatively, graphs can be saved individually, ideal for creating your own reports.

Folder

If you find documents that you want to save for use elsewhere in PatDocs, simply click the folder icon next to the document of interest to save it to the folder.

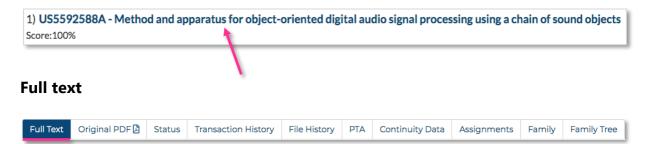


Access the full text page for the documents in your folder from anywhere in PatDocs by clicking on "Folder" in the header.



Viewing a record

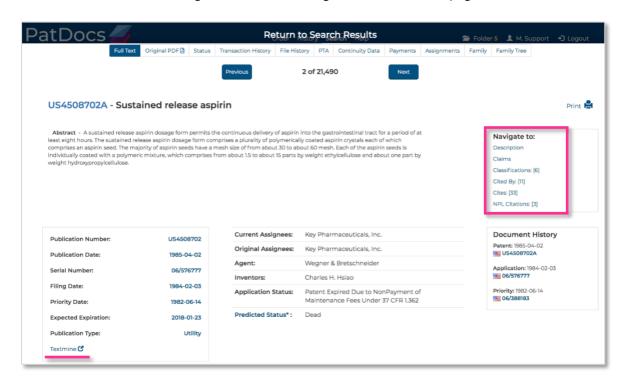
To view the details of a record, click on the patent number/title.



The first page that will be shown when you click on the patent number/title on the results page is the full text. This includes:

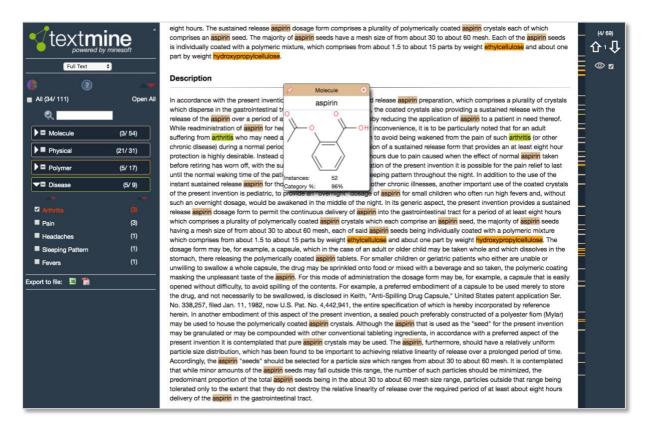
- Title
- Abstract
- Bibliographic information
- Textmine
- Document history
- Description
- Claims
- Classifications
- Cited by
- Cites
- NPL citations

For ease of use, there is a navigation menu on the right-hand side of this page.



Textmine

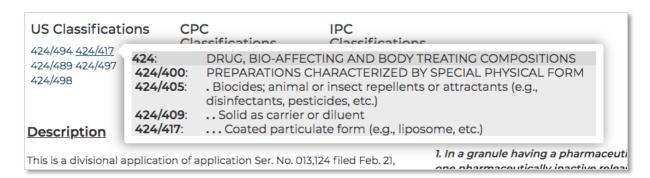
Underneath the bibliographic information is a link to Textmine, a datamining tool to extract key chemical and scientific parameter terms from within patent documents and explore them thematically. Some of the entities included are antibodies, genes & proteins, polymers etc.



The discovery bar on the left-hand side will list all of the entities found in the full text of the patent document. When an entity is selected, it will be highlighted, and you will be taken to an instance where it is mentioned in the document. Click on the entity where it appears in the text to open the Discovery window with further information about the structure.

Classifications

Clicking on the classification codes will open up with the tree so you can quickly check the description for the codes featured and see other related classification codes.



Claims

When reviewing the claims, independent claims can be easily recognised as they are written in bold italics.

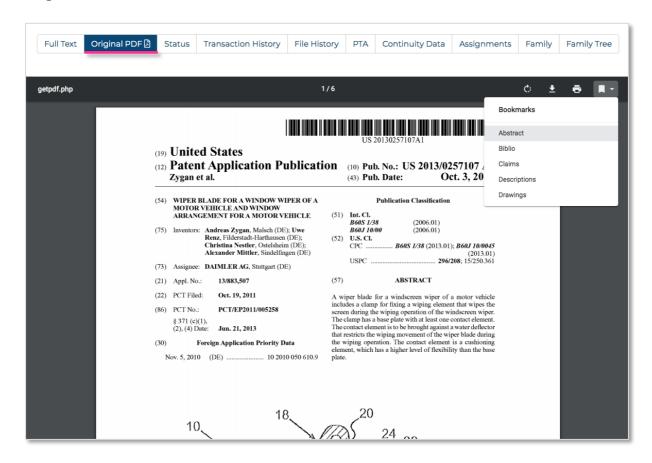
8. A granule prepared according to a process for producing a preparation comprising a plurality of granules each having a core and a unitary layer thereon containing at least one pharmaceutically active material which, on disintegration, release said pharmaceutically active material at a controlled rate, comprising applying to said cores in a continuous coating operation a solution or suspension containing at least one active compound and at least one pharmaceutically inactive release controlling substance over a period of time sufficient to cause said unitary layer of said active ingredient and inactive release Independent controlling substance to form on each core to give granules of size 0.3-2 mm, during said time period the concentration of active ingredient being decreased in the solution or suspension from which the layer is formed by adding additional release controlling substances to the solution or suspension, whereby there results granules each having a layer containing an active ingredient in which layer the concentration of active ingredient decreases radially outwardly from the core to the outer surface of said layer wherein the core has a minimum size of 0.5 mm and the finished granule has a size of 0.3-2 mm.

Citations

Scrolling down to citations, any citations from the US will have a hyperlinked patent number. This will open the full text window for this document in a separate tab. Non-US citation will be listed but won't always be hyperlinked, in some cases, non-US citations will link to the full text viewer in PatBase (viewable by non-PatBase users).

Cites					
ID	Title	Publication Date			
US312041A ♂	PROCESS OF MAKING PILLS	1885-02-10			
GB495854A ♂	Improvements in and relating to methods of treating medicaments	1938-11-21			
US2146867A 🗗	MEDICINAL PREPARATION AND METHOD OF MAKING THE SAME	1939-02-14			
US2262087A ℃	CHEWING GUM TABLET	1941-11-11			
GB669782A ♂	Improved pellets for pharmaceutical use	1952-04-09			

Original PDF



Original PDF opens the original publication as a PDF. Scroll through the different sections by going through the bookmarks: abstract, biblio, claims, descriptions, drawings.

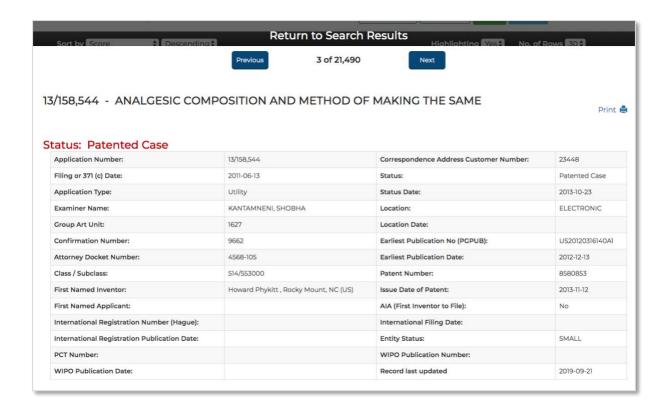
Status



The status page shows the status information for the publication, with details including:

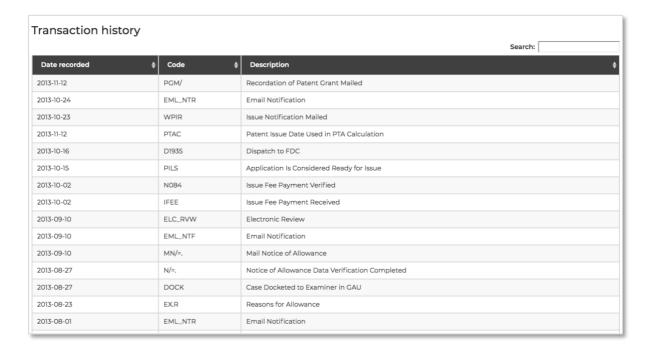
- Filing or 371 (c) date
- Examiner name
- Group art unit
- Confirmation number
- Attorney docket number
- Etc. etc.

All this data is taken directly from the US PAIR website.



Transaction History

The transaction history shows the full transaction history of the publication.



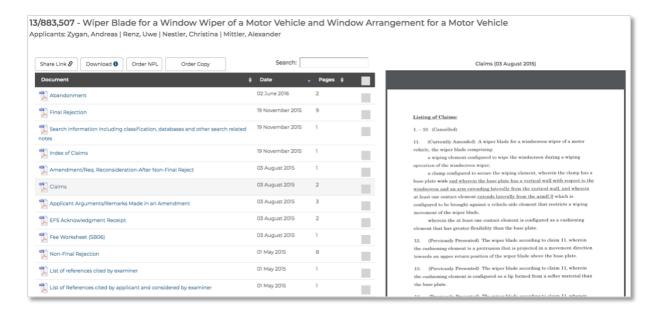
The table is searchable by date, code or description and can be sorted by date (ascending/descending), code (alphabetical order) and description (alphabetical order).

File History



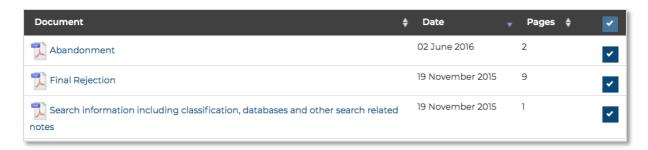
The file history lists all communications and documents related to the publication. These are displayed in a side-by-side view making it easier to review multiple documents at once.

The table of documents is completely searchable and can be sorted by document (alphabetical), date (ascending/descending) or number of pages (ascending/descending).



You can share a link to this page, by selecting "Share Link" at the top of the page, this can then be copied and shared with anyone, even non-PatDocs users.

Download all documents by selecting the checkbox at the top of the table and clicking "Download", alternatively, tick the checkboxes individually to download only documents of interest.



Please note, the sort order of the downloaded file will be the same as the sort order of the table.

From the file history page, you can order a copy or certified copy from Tempus IP (Minesoft's IP document delivery service). This will cost a small additional fee. To order a copy of the file history, select "Order Copy". A pop-up window will appear where you can contact Tempus IP directly with the request.



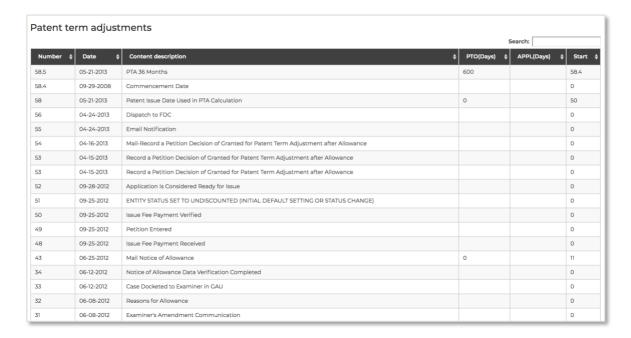
You can also order non-patent literature (NPL) directly from Tempus IP on this page. Simply select "Order NPL" and a pop-up window will appear where you can contact Tempus IP directly with the request. The quote for this service will be shown.



PTA (Patent Term Adjustments)



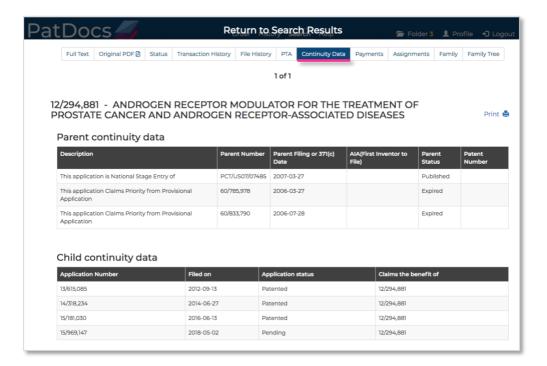
The PTA page shows an overview of patent term adjustment events in a table format. The table is completely searchable and can be sorted by number (ascending/descending), date (ascending/descending), content description (alphabetical order), PTO (ascending/descending) APPL (ascending/descending) and Start (ascending/descending). PTO and APPL refer to the patent office and application. The table shows how many days each party delayed the patenting process.



Above this table is a summary table, showing the filing or 371© date, the issue date of the patent, any delays or adjustments in number of days.

Filing or 371(c) Date:	2016-12-20	Overlapping Days Between {A and B} or {A and C}:	0
Issue Date of Patent:	2019-10-15	Non-Overlapping USPTO Delays:	353
A delays:	353	PTO Manual Adjustments:	0
B delays:	0	Applicant Delays:	0
C delays:	0	Total PTA Adjustments:	353

Continuity Data



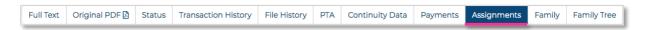
The continuity data section can be printed by selecting the "Print" icon at the top right-hand corner.

Payments

The Payments tab opens up a PDF from the USPTO with all maintenance fees listed, including paid maintenance fees and due maintenance fees. This can be shared by printing or downloading the document.

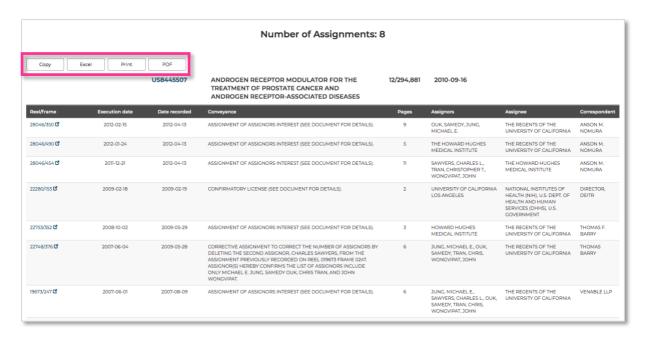


Assignments



The Assignments tab contains all assignment information for the publication in a table view. The rows of the table can be copied to the clipboard, exported as an Excel or PDF file and printed. Any downloads will include the "Date Downloaded" as well as all data in the table.

Clicking on the hyperlinks will take you to the USPTO website to see more detailed information about the assignment.



Family

Clicking on the "Family" tab will take you to the legal status information for the entire family, in the "Legal Information Browser".



To view the probable assignee and abstract for the family, click on the arrow at the top of the page.

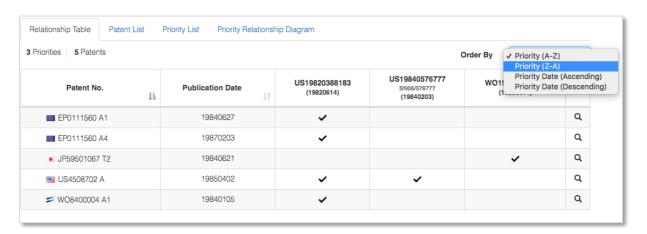
Priority Map

The "Legal Information Browser" will open on the "Priority Map" page, split into 4 tabs: Relationship Table, Patent List, Priority List, Priority Relationship Diagram.

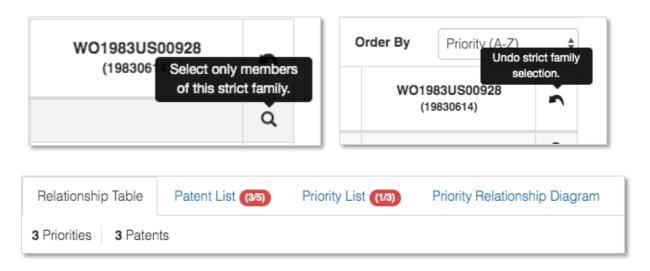
Relationship Table

The relationship table shows how the publications within a family are related by priority number by ticking corresponding priority numbers for each patent within the family.

The dropdown menu on the right-hand side allows you to order the table by Priority (A-Z), Priority (Z-A), Priority Date (Ascending) & Priority Date (Descending). The table can also be ordered by patent number (alphabetical) & publication date, by clicking the arrows in the bottom of each cell.



To view only members of a strict family (i.e. patents that share the exact same priority numbers) simply click the magnifying glass on the right-hand side. To go back to viewing the priority relationships for the entire family, click the reverse arrow in the top row.



Please note, this will also change the patents shown in the Patent List and Priority List tabs.

Patent List

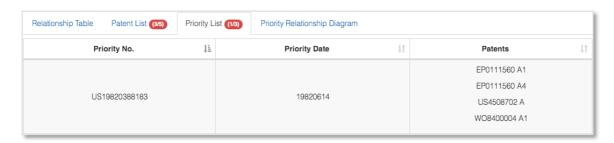
The patent list shows which patents are associated with which priority numbers within a family. The columns show the patent number, publication date and priority numbers.



The table can be ordered by patent number (alphabetical), publication date (ascending or descending) and priority number (alphabetical).

Priority List

The priority list shows which priority numbers are associated with which patents. This is useful for seeing which priority numbers are most common within a family. The columns show the priority number, priority date, and publication numbers.



The table can be ordered by priority number (alphabetical), priority date (ascending or descending), publication number.

Priority Relationship Diagram

The priority relationship diagram is useful for sharing. Download/print options are available in the top right-hand corner.



Legal status event groups

The Legal Status groupings are based on the INPADOC PRS codes and the patent office codes from each national patent office. These are allocated into categories making them easy to manage:

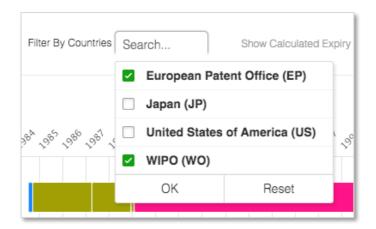
LSAS	Reassignment	LSNP	Entry into national phase
LSDW	Deemed withdrawn/abandoned/cancelled	INDP	Opposition/filed/request for revocation/annulment
LSES	Examined/supplementary search report issued	LSPB	Published
LSFE	Renewal fees paid	LSKE	Restored/reinstated/amended/partially amended
LSGT	Granted/extended (supplementary protection certificate)	LSRV	Revoked/rejected/annulled/invalid
LSLE	Lapsed/expired/ceased/dead		Withdrawn/abandoned/cancelled/ surrendered/suspended/terminated/ void
LSLI	License	LSAP	Applied
LSNE	Non-entry into national phase	LSRX	Reexamination
LSAL	Appeal		

Timeline view

The timeline view shows the legal status history of each application in a family. Above the timeline, there are options to "Filter by countries" or alternatively use the search bar to find specific information. There are also options to choose whether to show reassignments, calculated expiry dates or EP National Phases.

Filter by Country

Open the dropdown menu and use the checkboxes to select countries of interest, once the selection has been made, click "OK". To remove the filter, open the dropdown menu again and select "Reset".



Show calculated expiry dates

The calculated expiry dates consider the different patent terms for each country, the type of document, and additional information (where available), for example: Supplementary Protection Certificates (SPCs) and Patent Term Extensions (PTEs).

When the calculated expiry dates are activated, the timeline is extended into the future, ending with either a red or orange line. The red line symbolises a "Calculated Patent Term Expiry", the orange line symbolises an "Assumed Expiry".

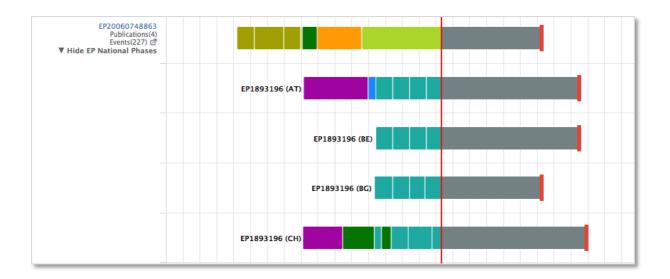


Show EP National Phase

When this option is activated, the EP National Phase(s) for each granted EP document will be shown, so the legal status for each jurisdiction included under the EP document will be shown.



The EP National Phase(s) can also be shown by opening the dropdown underneath each EP publication.



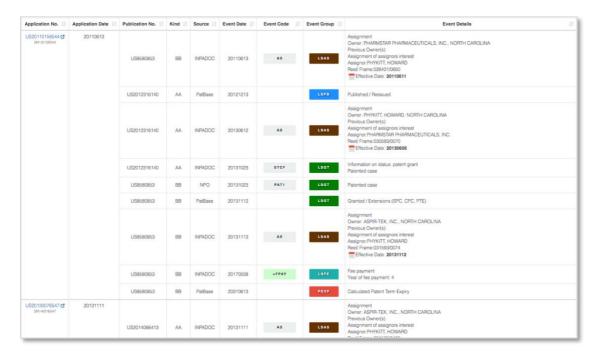
Show Reassignments

Once activated, this option will show any available reassignment information for each application. Reassignment information is presented as a maroon bar under the standard legal status bar.

For more detailed information about Reassignments, select the "Reassignments" tab from the toolbar.

Table View

The table view shows the application number, application date, publication number, kind code, source, event date, event code, event group and event details for each publication within the family.



The hyperlinked application number will direct you to the register where you can view more information about the legal status for the specific publication(s).

The event code is the official legal status code used by the patent office in question or INPADOC. The event group adds different event codes into categories. For information about the event group in question, either hover your mouse over the relevant code, or scroll to the bottom of the page to find the key, which contains all the available groups in the family.

The table can be sorted by application number, application date, publication number, kind code, source, event date, event code, event group or event details by clicking on the arrows next to the relevant header.

Above the table, there are options to filter by country and event group or alternatively use the search bar to find specific information. You can also choose whether or not to show reassignments.

Reassignments

The reassignment table shows the publication number, date, assignee information, standardized assignee information, and most reassignment event.

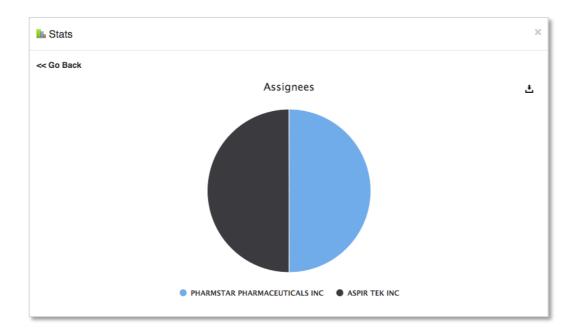
You can see more information about the reassignment history of each publication by clicking on the first to the publication number. Click on the publication number itself to load a "Publication Summary".



Above the Reassignment table, there are options to filter by country or alternatively use the search bar to find specific information. In addition, there is a "Stats" option, a "Show Inventor" option and a "Show Reassignment Histories" option.

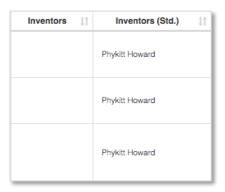
Stats

The Stats option will load a pop out window which shows a table of all the assignees included within the family and how many times the assignee occurs. This can also be presented as a pie chart by selecting "Chart" option. The pie chart can be downloaded as a PDF, JPEG, PNG or vector and/or printed as required.



Show Inventors

Once you have ticked the checkbox next to "Show Inventors", two additional columns will appear in the reassignment table with "Inventor" and "Standardised Inventor" information.



The reassignment history can be viewed in two ways, to load all reassignment histories, tick the checkbox next to "Show Reassignment Histories".



To check the reassignment history for a specific publication, select "More reassignments are available" (this shows the history where additional information is available), a pop-out window will appear with a Reassignment History Table for the publication of interest.

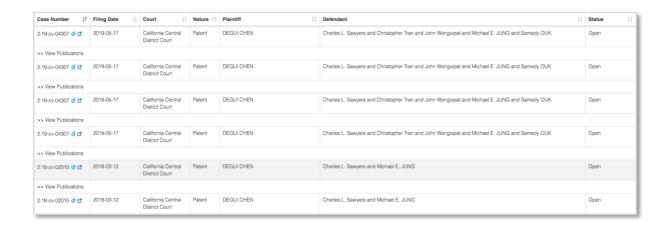
*More reassignments are available ##

Litigation

Where available, the litigation tab will show all litigation proceedings for a patent family.

It can be viewed either by case or publication by selecting your preferred choice from the drop-down menu.

The table can be sorted by "Case Number", "Filing Date", "Court", "Nature", "Plaintiff", "Defendant" and "Status" by clicking the arrows in the top row.

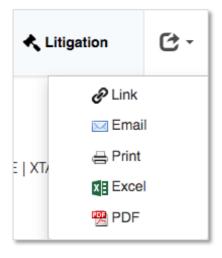


For more information about the case, click on the link next to the case number of interest. If you are a Darts-IP user, you can click the to see more information about the listed litigation in Darts-IP.

More information is available about the contested publication(s) by clicking "View Publications" underneath the case number of interest.

Download/print options

Download and print options are available for each section. An offline link can be generated and shared by email, or the data can be downloaded as an Excel, PDF or Word document.



Family Tree

Takes you to the family tree for this patent family. Please go to the <u>Family Tree</u> section for more information about family trees.

Administrator Site

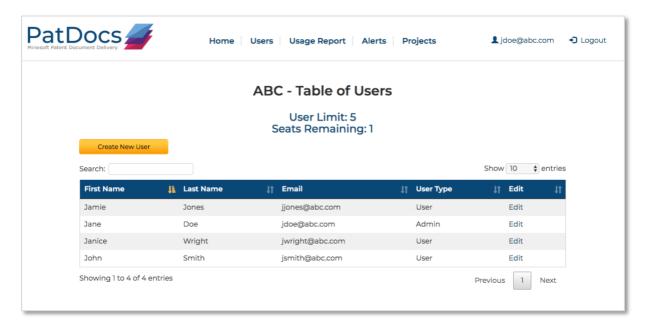
The administrator website is only accessible by administrators on the account. From this area, you can manage your users, view a usage report for your account, set up alerts and create separate projects (for your alerts).

Access the Administrator Site from the footer.

Users

Admins can create new users from the "Users" page or edit current users. To delete a user, please contact support@minesoft.com or your account manager.

You can sort the table by first name, last name, email address or user type, these will be sorted in alphabetical order. The table is also completely searchable.



Create a new user

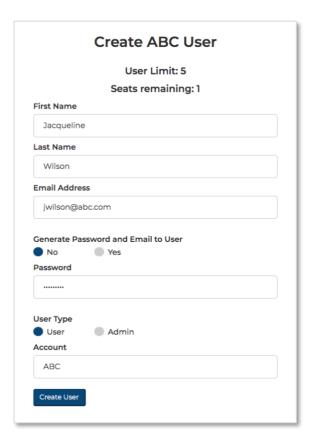
On the "Users" page, you can see your user limit (in this case 5) and the number of seats remaining (in this case 1). If you require more user IDs, please get in touch with your account manager.

Provided you have seats remaining, click "Create New User".

This will open a new page where you'll need to fill in the first name, last name, email address and user type of the user you are setting up.

There is an option to generate the password and send an email with the generated password directly to the email address you've provided. Or, select "No" and choose the password yourself.

Page 47 of 54 PatDocs Guide support@minesoft.com The next option is to choose where they will be a regular user or admin. Admin users will also be able to access the "Administrator Website" and manage users, view usage reports and create alerts and projects.



Editing users

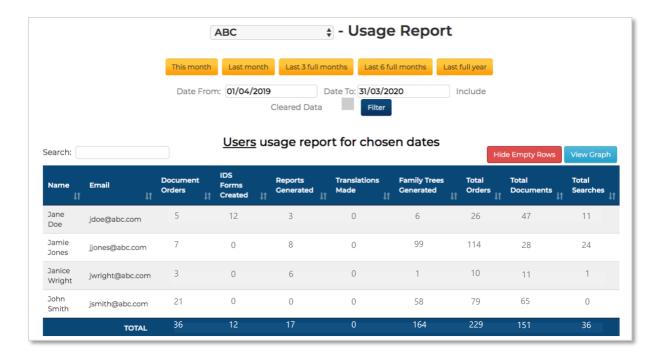
To edit a user, select "Edit" on the corresponding row of the table.



You'll be taken to a new page where you can edit the first name, last name, email address and user type. You can use this to reassign user IDs to different people, change surnames etc.

Click "Save Changes" to finish editing and save any changes you've made.

Usage reports



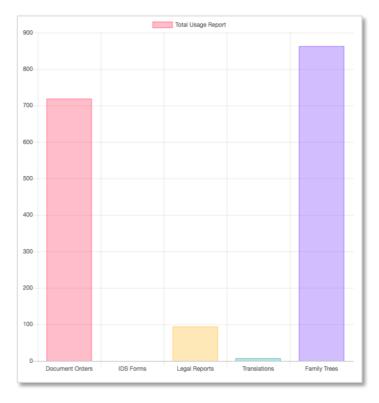
The usage report shows a breakdown of all users' usage on your account by number of documents ordered, IDS forms created, reports generated, translations ordered, and family trees generated. This can be filtered by the current month, the last month, the last 3 full months, the last 6 full months or the last full year. Alternatively, select your own dates in the "Date From" and "Date To" input boxes.

The table can be sorted by any of the columns and is fully searchable.

Clicking on "View Graph" will take you to a graph which shows an overview of the usage of the different features in PatDocs, across your account.

This example shows that a high volume of documents are being ordered, many family trees are being generated, however fewer legal reports being created and translations being ordered. There are also no IDS forms being created.

Please note, if using subaccounts/references, these will be shown in a table below.



Projects

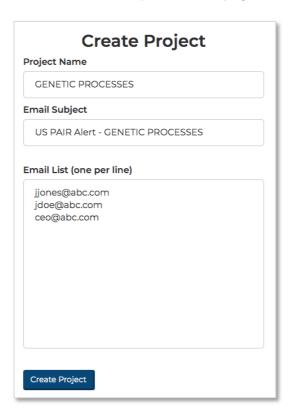
Projects in PatDocs are used to assign recipients for the PAIR Alerts.



Creating a project

To create a new project, go to the "Projects" tab and select "Create New Project".

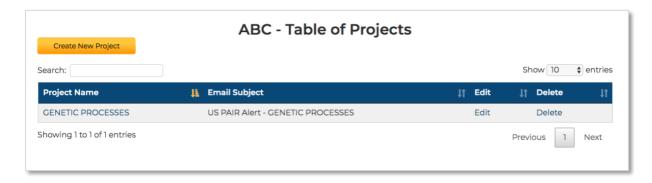
You'll be taken to a new page where you can choose a name for the project, a subject line for the alert emails and enter a list of emails (these are the recipients for the project).



Click "Create Project" to save the project.

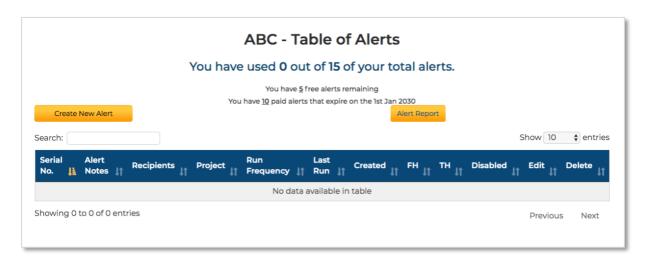
Please note, the emails you enter don't need to be PatDocs' users and there's no limit on number of emails added.

Editing projects



You can edit or delete projects when viewing the "Table of Projects" under the "Projects" tab.

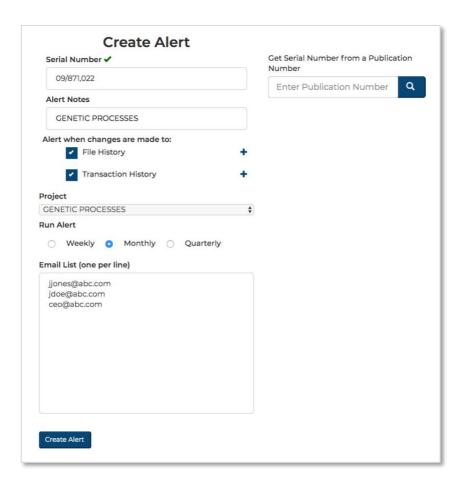
Alerts



All PatDocs accounts include 5 free alerts and additional paid alerts can be included. Contact your account manager or support@minesoft.com to enquire about setting up additional alerts.

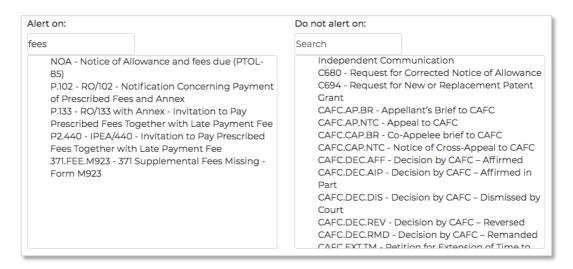
Creating Alerts

To create a new alert, go to the "Alerts" tab and select "Create New Alert". You'll be taken to a new page where you can enter a serial number, alert notes, which areas you would like to be or not like to be alerted on, assign the alert to a project (see project section for more information), select how regularly you'd like to run the alerts and enter email addresses to receive the alerts (only if you haven't assigned the alert to a project).



If you're not sure what the serial number is but have the publication number to hand, you can enter this into the input box on the right-hand side.

If you tick "File History" and/or "Transaction History" under "Alert when changes are made to", you will be alerted when there are any change to the file history and/or transaction history. If you want to be more specific with what areas to be alerted on, simply click on the cross icon to expand a detailed list of changes and select what to include or exclude.

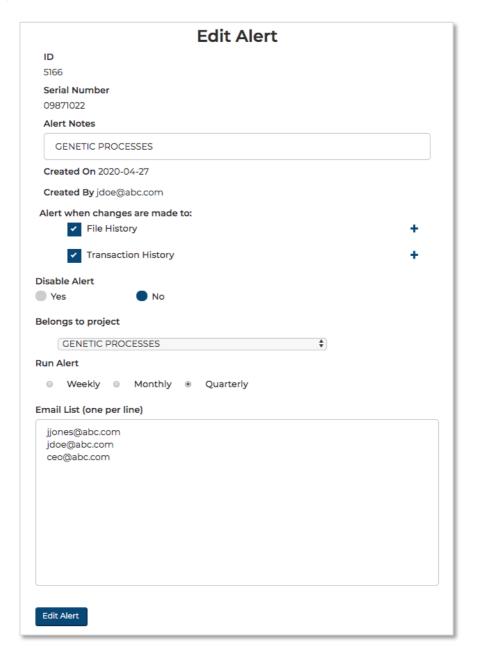


Editing Alerts

You can edit and delete alerts when viewing the "Table of Alerts" under the "Alerts" tab.



Select "Edit" to be taken to a new page where you can edit the alert notes, select what changes you want to be alerted about, disable the alert, change which project the alert is assigned to, choose how regularly you want the alert to run and edit the list of recipient emails (only if the alert is not assigned to a project).



Alert Report

The "Alert Report" is an Excel export with all details of the alerts set up on your account.

Serial Number	Date Created	Run Frequency	Alert Notes	Monitor file hist	Monitor transaction hist	Recipients	Project Name	Email Subject	Disabled	Last Run	Errors	Title
11/108,606	2018-10-30	weekly	Beta Alert 1 Te	TRUE	TRUE	jdoe@abc.com, jjones@abc.com, ceo@abc.com	GENETIC PROCESSES		FALSE	2020-04-25		ANTIBODY DRUG CONJUGATES THEREOF
14/819,541	2019-01-15	weekly	RH1 N1	TRUE	TRUE	jdoe@abc.com, jjones@abc.com, ceo@abc.com			FALSE	2020-04-25		COMPOUNDS AND THEIR USE AS DOPAMINE D1 LIGANDS
14/740,439	2019-01-15	weekly	RH2 N2	TRUE	TRUE	jdoe@abc.com, jjones@abc.com, ceo@abc.com			FALSE	2020-04-25		SUBSTITUTED DIHYDROISOQUINOLINONE COMPOUNDS
14/657,302	2019-01-15	weekly	RH3 N3	TRUE	TRUE	jdoe@abc.com, jjones@abc.com, ceo@abc.com			FALSE	2020-04-25		PROSTATE-ASSOCIATED ANTIGENS AND VACCINE-BASED IMMUNOTHERAPY REGIMENS
												fluorophenyl)-beta, delta- dihydroxy-5-(1-methylethyl)-3- phenyl-4-
14/716,361	2019-01-15	weekly	RH4 N4	TRUE	TRUE	jwright@abc.com, jsmith@abc.com, jdoe@minesoft.com	KIDNEY RESEARCH		FALSE	2020-04-25		[{phenylamino}carbonyl]-1H- pyrrole-1-heptanoic acid

Select the "Alert Report" button under the "Alerts" tab to export this information.

