

IPShare user guide

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Getting started

Once your account has been set up. You will receive an email from ipshare@minesoft.com asking you to set your password.

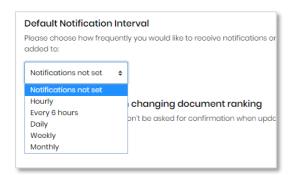
Click on the *Set password* link and you will be taken to the IP Share website. Simply enter a new password and click the *Set Password* button.

After the password has been reset, you will be taken to the sign-in page where you need to enter your email address and newly set password before logging in.

Setting notifications

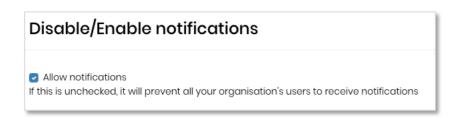
It's possible to set up and choose how frequently you would like to receive notifications on projects. The first way is to navigate to the *Settings* page, then to *Default Navigation Interval*.





Alternatively, you can set your notification settings by project by clicking on the icon in the right-hand column of the project table:

As an administrator on the account, you can also choose whether to disable or enable notifications across the entire account from the *Settings* page.

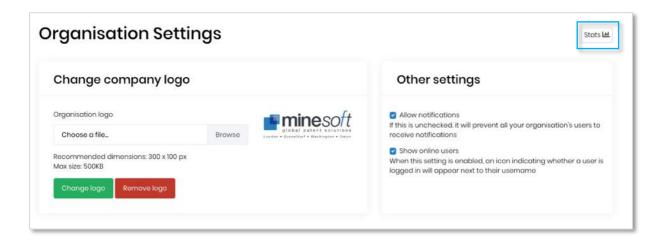


Adding your company logo

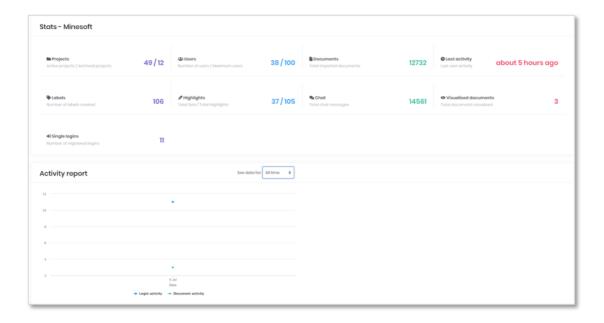
It's possible to add your corporate branding in the form of your company logo to your IPShare account. To do this, you'll need to navigate to the *Settings* page and scroll down to the *Organisation Settings*. There will be an option to upload your logo.

Usage stats

Administrators can view the usage stats for the account or organisation from the *Settings* page. Simply scroll down to Organisation Settings and select the Stats button in the right-hand corner.

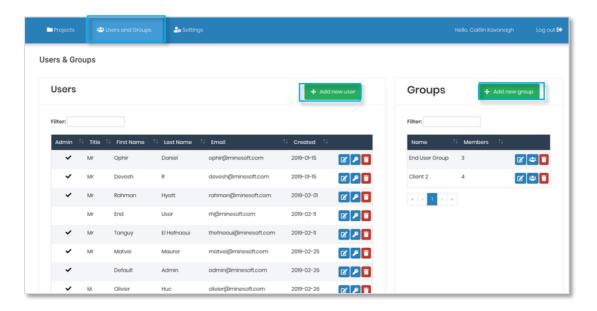


A new page will load with a breakdown of your organisation's usage:



Adding users and groups

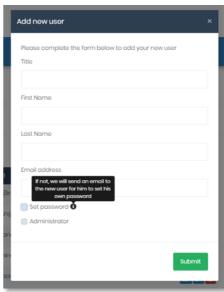
As an administrator, you are able to add users and groups to your account. Navigate to the Users and Groups page from the toolbar:

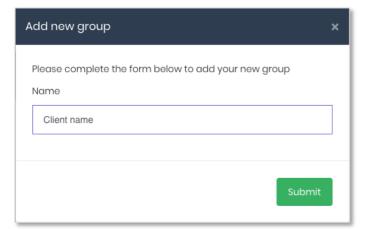


Start by adding new users, clicking the *Add new user* button. A pop-up window will appear asking for the name and email address of the new user you wish to add. There is also an option to make this new user an administrator.

As an administrator you can choose to either set the password for the user yourself or send them an email so they can set up their own password.

Once you have added your users, you can now set up a user group. This group will then be able to work on one or more projects depending on how you assign their permissions. We will go into this in more detail in the next section.



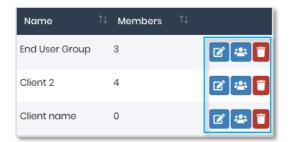


Click *Add new group*, a pop-up window will appear so that you can select a name for the new group.

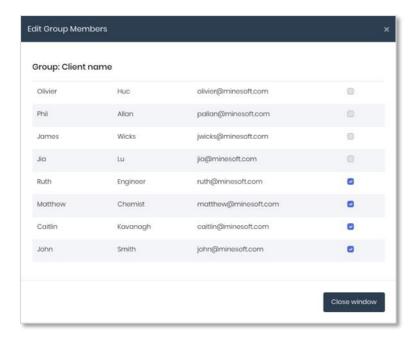
Now that you've created your group, you can assign users, delete or rename the group.

Clicking on the add user button will bring up a pop-up window where

you can tick which users you would like to include in the group. For example, Ruth, Matthew, Caitlin and John will be added to my group "Client name".

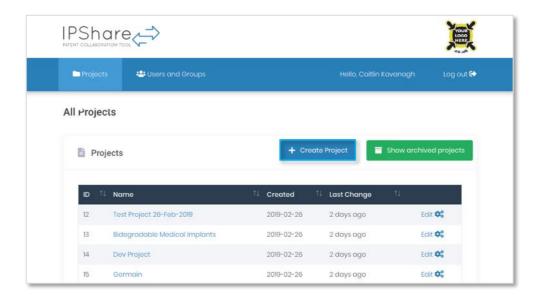


Please note: deleting a user does not erase their work (all documents, chat entries, annotations etc. they may have created will stay on the account)

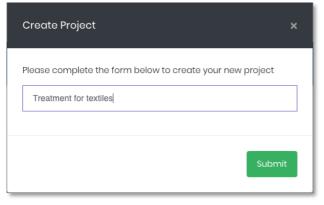


Creating a project

Now that we have our user group set up, we will navigate back to the project page to set up a new project and assign our user group to this. Click *Create Project* to get started.

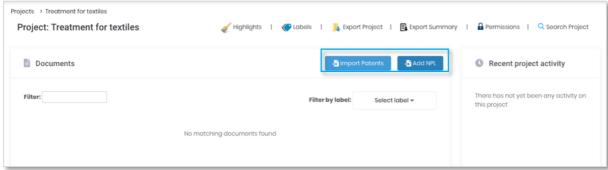


A pop-up window will appear asking you to enter a name for your new project. Once you have submitted this and created the group, open up the project by clicking on the name in the project table.

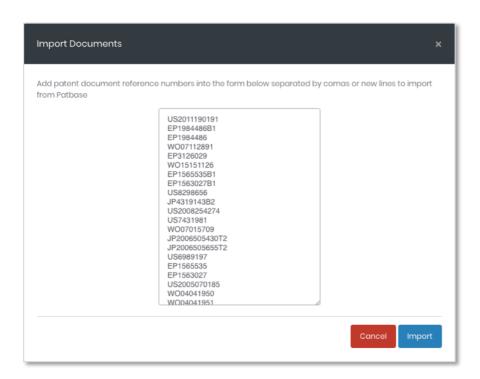


Importing patent numbers and NPL

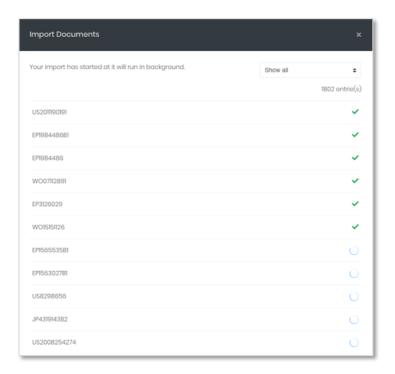
Patent documents and non-patent literature can be imported by clicking the relevant button.



Clicking on *Import Patents* will open up a pop-up window where you can paste in patent document reference numbers, these can be separated by comas or one per line.

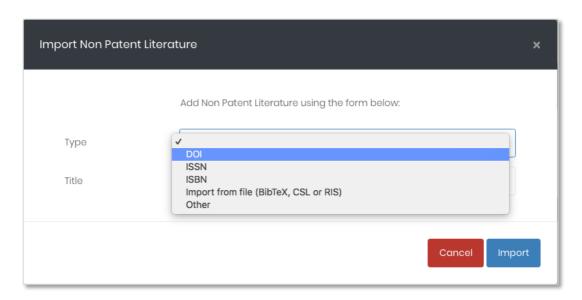


Clicking on *Import* will start downloading the documents, this will continue to run in the background so you can focus on other work. There's no need to keep this window open.



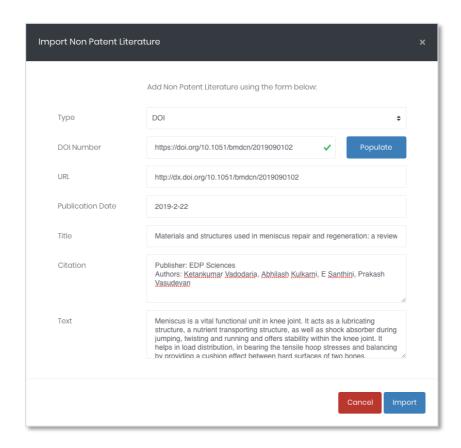
To add non-patent literature, click Add NPL.

A pop-up window will appear where you can choose the type of import you will be using.



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Entering the DOI number will auto-populate the form, as shown below. The other import options must be uploaded or inputted manually.

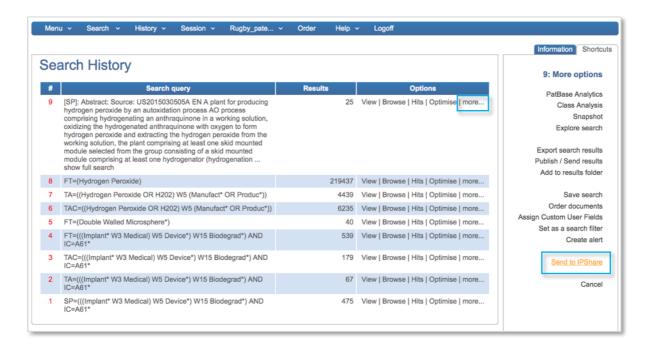


Once you have imported NPL documents you can continue to edit them within IPShare.

Notice that as you upload documents your recent activity will be logged on the right-hand side of the project, under Recent project activity. This logs all activity on the project and is viewable by all users on the project.

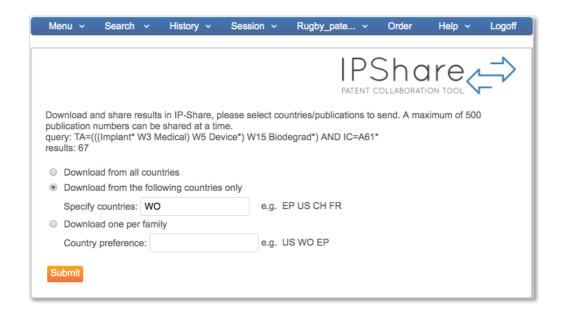
Importing from PatBase

Another way to import patent documents into IPShare (for PatBase users only), is from the search history in PatBase.



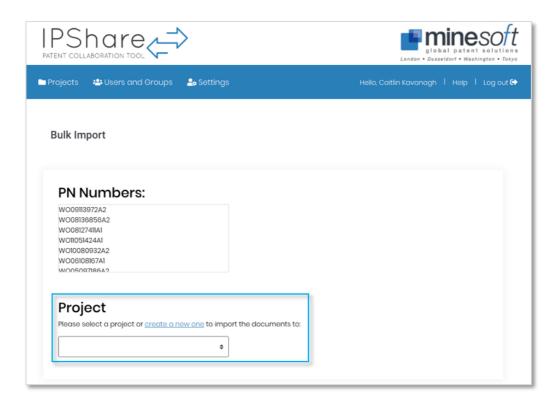
Please note: IPShare users do not need a PatBase subscription but the two systems are compatible.

Simply click "more..." next to the search query of interest and then select "Send to IPShare" under "More options".



Page 10 of 37 IPShare user guide support@minesoft.com You will be sent to a separate page where you can choose between importing publications from all countries, from specific countries, or one publication per family by your country preference.

Once you're happy with your choices, click "Submit". IPShare should open automatically within a few moments.



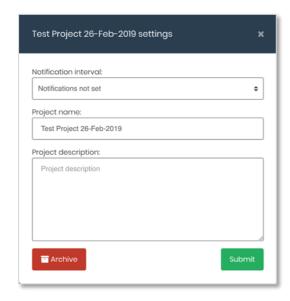
You will be given the option to either import the documents into a current project or "create a new one". If you need to create a new project, a pop-up window will appear where you need to provide a project name and description. When you have submitted this information, you will return to the page and select the newly created project from the drop-down menu.

The documents will then be imported as usual.

Editing a project

It's possible to change the project name, set notification intervals and add a project description, to do this navigate to the project table.

A pop-up window will appear, like below:



From the *Notification interval* drop-down menu, you can choose how often people on the project receive notifications, the following options are available: hourly, every 6 hours, daily, weekly.

Rename the project by entering a new name into the input box for *Project name*.

Enter a project description by entering it into the input box under *Project description*

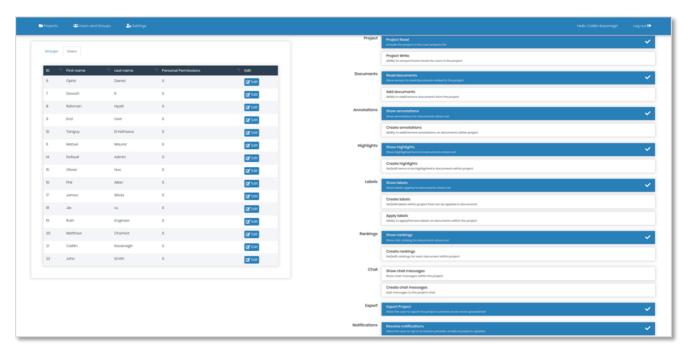
Setting up users on a project

To set up users on a project, navigate to the *Permissions* tab on the project page.



You can choose to add a user group or add users individually. If you add users as a group, their permission levels will all be the same, if you want different users to have different permission levels then you will need to do them individually. Click the Edit button to the right of the user name or group name to open up the different permission levels.

The options available are extensive. In this example, I am setting up the user to be able to view and export all areas of the project, but they wouldn't be able to make any changes to the project.



Just select the permissions you want to include for each user or group and then return to your project.

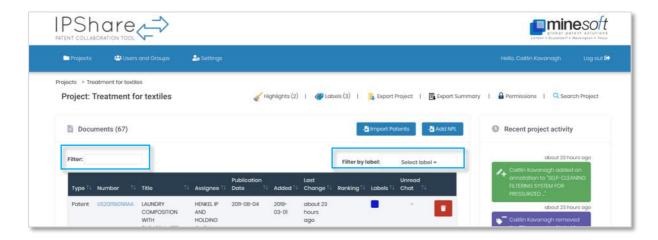
You can also bulk select permissions by "Read all" or "Write all" by using the switch at the top of the page:



Please note: the permission levels you assign on a user level take priority over group permissions. For example, if you add a group that has permission to apply labels and then add a user which also belongs to the same group but you remove their ability to apply labels, this will have priority.

Filtering & sorting

You can filter your document table on a project page by label or by document type, publication number, title, assignee and publication date.



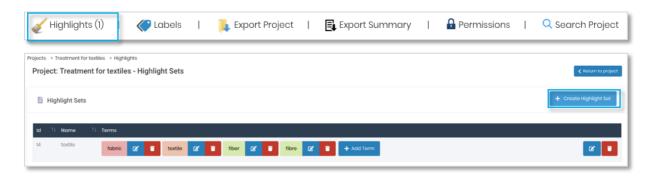
To filter by label, open the drop-down menu at the top-right of the document table, and select the label you want to filter by.

To filter by document type, publication number, title, assignee or publication date, please use the input box at the top-left of the document table.

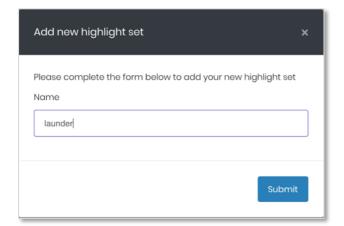
Please note: Boolean operators and truncation will not work when applying filters.

Creating a highlights set

To create a highlight system, navigate to the *Highlights* tab on the project page. The (1) below indicates that I already have one highlights set for this project.



Click Create Highlight Set.



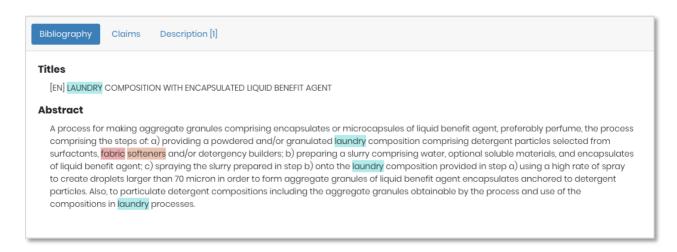
You can create an unlimited amount of highlight sets, for different areas of the project.

Please note: each highlighting set is only applied to the current project.

Once you've entered a name you can input the keywords you would like highlighted and choose a colour for each.

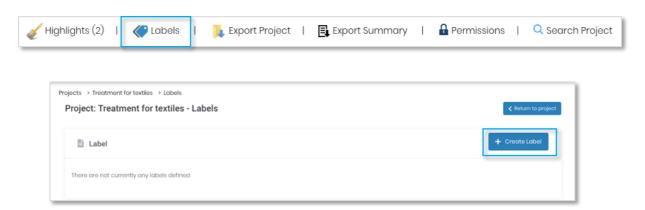


The "*" truncation is activated, so for example if you used "soften*" this would highlight "softened", "softener", "softening" etc.

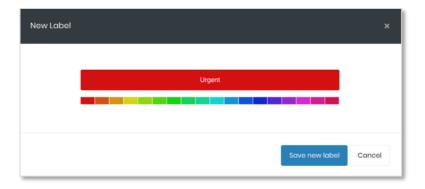


Creating labels

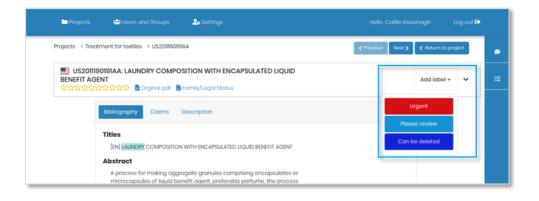
To create a label, navigate to the *Label* tab on the project page.



You can set up an unlimited number of labels. Click Create Label to open a pop-up window where you can choose a title and colour for your label. Click *Save new label* once you are finished.



You can add a label to each document or as required. When viewing the document just go to the *Add label* drop-down menu in the right-hand corner and select one or more labels.



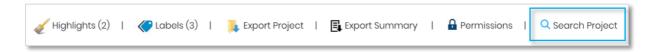
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Once labels have been added, you can also view them in the document table.



Searching across a project

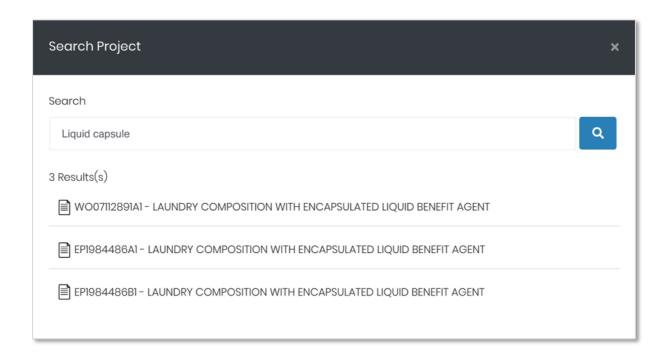
Once you have set up your project, it's possible to run a search across all documents in the project. To run a search, navigate to your project page and select *Search Project* in the top right-hand corner.



A pop-up window will appear where you can search keywords, inventors or assignees etc. Here we have searched keywords as an example, but this search feature covers the full text document and all bibliographic information.



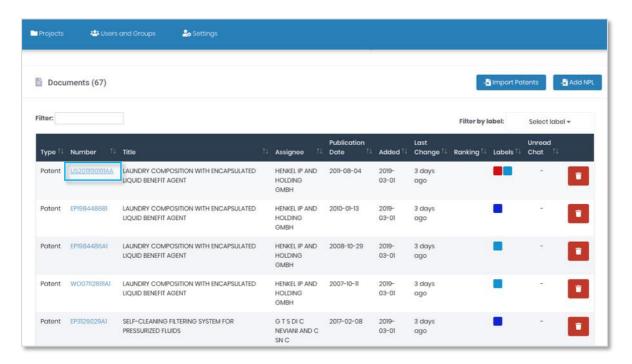
Once you have entered your query, click the magnifying glass icon to search. Any results will be listed below your search query. Click on the titles to be taken to the document of interest.



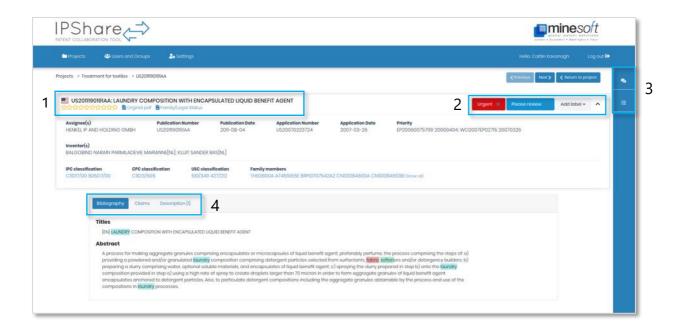
Please note: Boolean operators and truncation won't work when searching across your project

Reviewing documents

To review a document in your project, click on the patent number in the document table in the project of interest.



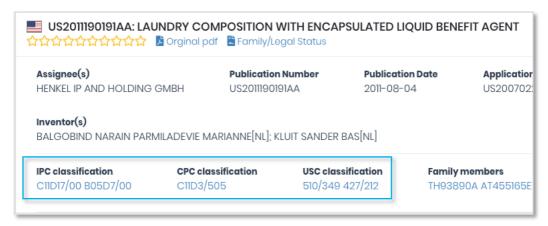
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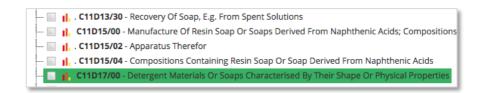
- 1 From here you can assign a star rating out of 10 to the document, access the original PDF or open the legal status browser for this patent family
- 2 Any labels are shown here with the option to add additional labels if required
- 3 Open up the chat window here or the action history
- 4 Click through to the bibliography, claims or description

Classification Explorer

Classification Explorer can be accessed from IPShare by clicking on a classification code of interest when viewing a document.

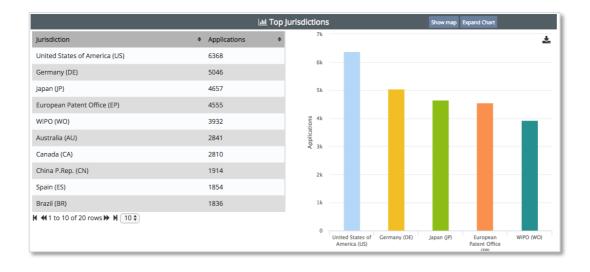


The classification tree will open with the selected code highlighted.



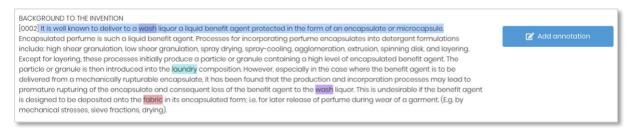
Clicking on the bar chart icon (1.1) will load the *PatBase Class Analysis* for this code. A summary with tables and charts displaying an overview of this code, including top assignees, top jurisdictions, application and grant velocity etc.

See following page for an example of the information displayed.



Adding annotations

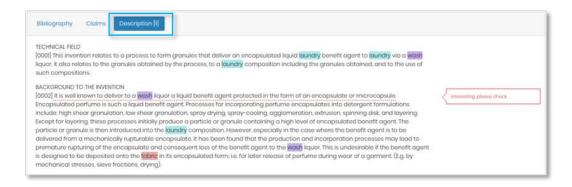
To add an annotation to a document, just use your cursor to highlight the section that you would like to add a comment on, like below:



A button will appear on the right-hand side which you can click to add an annotation to this section. Type your note into the input box which appears. Once you've clicked save the relevant section will be underlined with the comment shown to the right-hand side.

Other users will know that there is an annotation added as it will be shown on the Bibliography, Claims or Description tab at the top (depending on which section you added the annotation in).





Legal Status Browser

To access the legal status browser, click *Family/Legal Status* underneath the patent number and title when viewing a document.

The browser will open in a new window.

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. We allocate them into a category making them easy to manage:

LSAS	Reassignment	LSNP	Entry into national phase
LSDW	Deemed withdrawn/abandoned/cancelled	LSOP	Opposition/filed/request for revocation/annulment
LSES	Examined/supplementary search report issued	LSPB	Published
LSFE	Renewal fees paid	LSRE	Restored/reinstated/amended/partially amended
LSGT	Granted/extended (supplementary protection certificate)	LSRV	Revoked/rejected/annulled/invalid
LSLE	Lapsed/expired/ceased/dead	LSWD	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 publication in a family. Above the timeline, there are options to filter by country or alternatively use the search bar to find specific information. You can also choose whether or not to show reassignments, show calculated expiry dates or show EP National Phases.

Filter by country: Open the drop-down menu and use the checkboxes to select which countries you are interested in, once you have selected all of the countries you would like to view, select OK. To remove the filter, open the drop-down menu again and select reset.



Show calculated expiry dates: The calculated expiry dates take into account the different patent terms for each country, the type of document, and additional

information (where available), e.g. 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'.

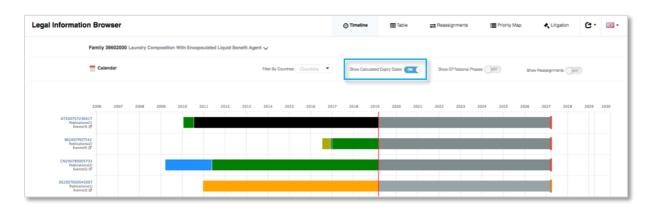
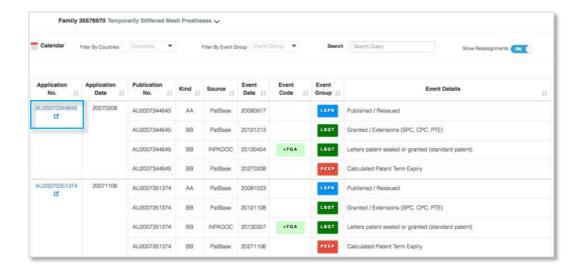


Table view



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 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.

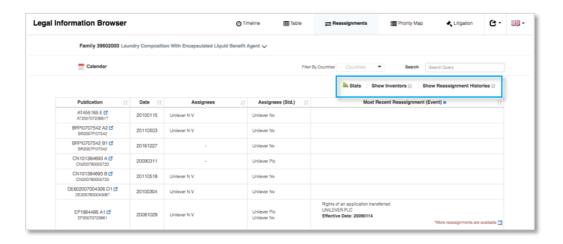
Above the table, there are options to filter by country and event group or alternatively use the search bar to find specific information. You can also choose whether or not to show reassignments.

Reassignments

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

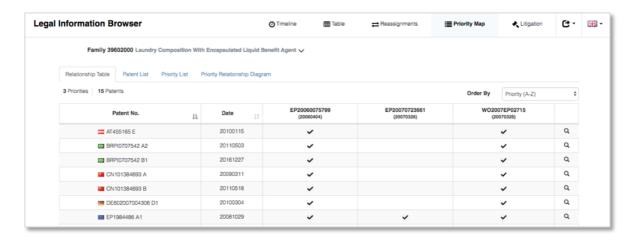
Each publication can be viewed in the national patent office website, by clicking on the next to the publication number. Alternatively, you can click on the publication number itself to load a *Publication Summary*.

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 (shows table of all assignees in family & how often they occur), a *Show Inventors* option (adds 2 extra columns to the reassignment table with inventor information and a *Show Reassignment Histories* option (loads all reassignment histories).



Priority map

The priority map page is split into 4 tabs: relationship table, patent list, priority list, priority relationship diagram.



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.

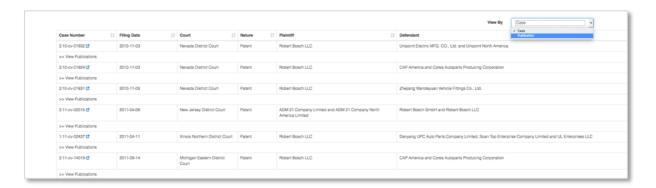
The patent list shows which patents are associated with which priority numbers within a family. This tab is less useful for highlighting the priority relationships between publications in a family. The columns show the patent number, publication date and priority numbers.

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 Priority relationship diagram is the most visually appealing option; therefore, it is useful for sharing. Download/print options are available in the top right-hand corner.

Litigation

Where available, the litigation tab will show all litigation proceedings (US only) 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.



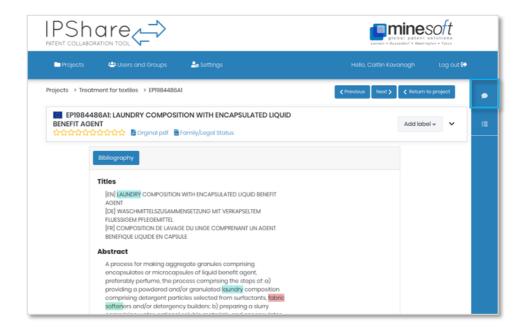
For more information about the case, click on the link next to the case number of interest.

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

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.

Chat messages

Chat messages can be accessed when viewing documents, a useful way to check in with other users on the project. You can access the chat from the right-hand side of the page.



When there are already messages present in the chat a double chat bubble icon will be shown, like:

If there is an unread message available, this will be shown in the document table for the project.

As an administrator you will be able to delete chat messages as required.

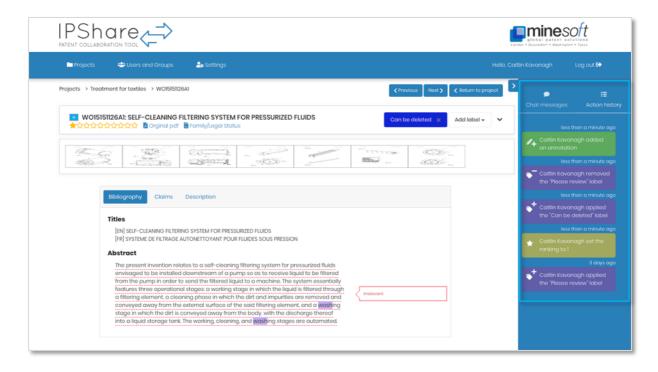
Please note: you need to click on the unread message icon to view the latest message in the chat.



Please note: chat messages are added on a document basis, i.e. there is a different chat for each document and no project chat

Action history

The *Action history* tracks any changes made to documents within a project. You can access the *Action history* from the right-hand side when viewing a document.



Keyboard shortcuts

The following keyboard shortcuts are available:

Viewing documents

N	Next document
Р	Previous document
S	Sidebar toggle

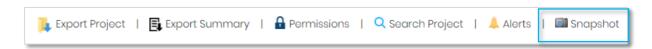
Image slideshow

N	Next image
Р	Previous image
R	Rotate image

When navigating through documents using keyboard shortcuts, data is automatically synchronized across all open pop-up windows, e.g. PDF, legal status, TextMine.

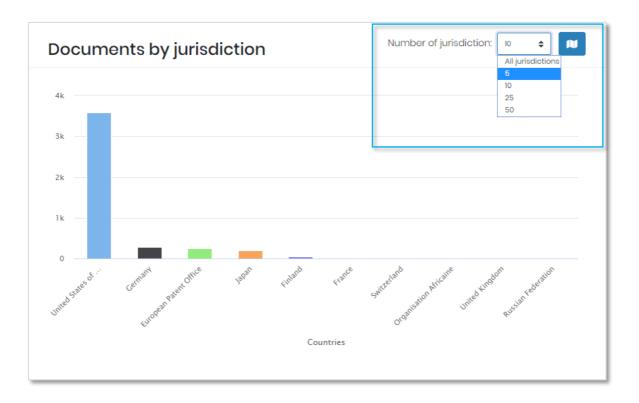
Snapshot

On the project page, there is a link to Snapshot in the top right corner. This is a simple analytics tool to help you visualise your project.



Here, you can see a general overview of jurisdictions, assignees and documents in graph form.

Above each graph in the top right corner there is drop down menu where you can select the number of jurisdictions/assignees you would like to see if your graph.



Exporting

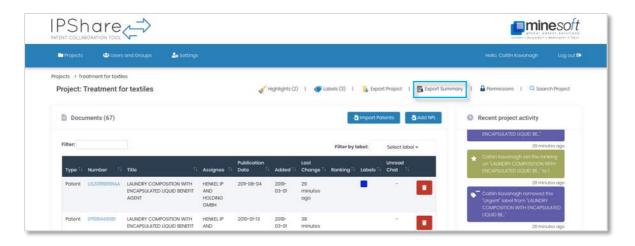
Export Summary

The summary export is a one-page Excel spreadsheet which shows all information for patents or non-patent literature within a project. The information included in the summary export is as follows:

- Document type
- Family number
- Country code
- Publication number
- Kind code
- Publication date
- Application number
- Application date
- Title
- Abstract
- Probable assignee
- Claims
- Any chat messages
- Any applied labels
- Any annotations (doesn't show where in the document was annotated)

Please note: the claims may exceed the maximum character limit for cells in Excel and be cut short.

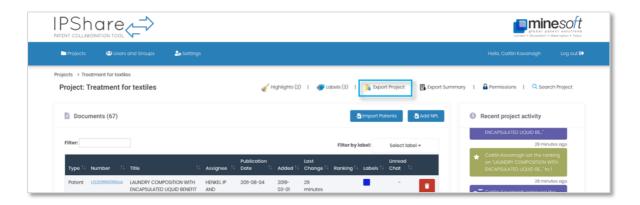
To run this export, navigate to the project that you wish to export and click *Export Summary* at the top of the page.



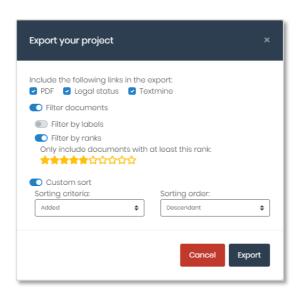
Export Project

The full project export contains more details about each document in the project with the full bibliography, claims and description included in the export. It also includes the star ranking for each document (where one has been given) and annotations (including where in the text the annotations are have been added).

The Excel file is separated into a spreadsheet for each document in the export, with a *Contents* page showing the publication number and title for each document included. To run this export, navigate to the project that you wish to export and click *Export Project* at the top of the page.



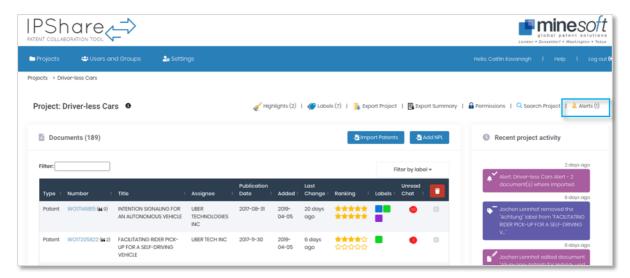
A pop-up window will appear with the option to remove the links to the original PDF, legal status browser and TextMine from the exported document. In addition, you can choose to filter documents in the export by labels or by ranking and you can set a custom sort order by selecting a sort criteria (options include sort by Publication Date, Date Added, and more) and order by ascending or descending.



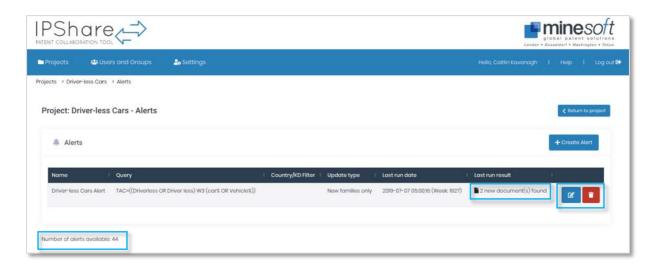
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IPShare alerts

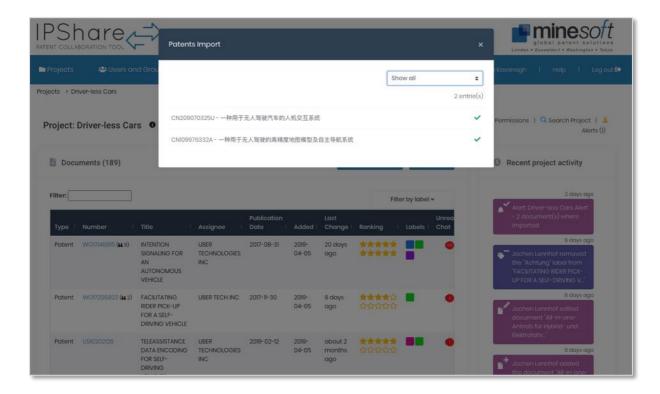
IPShare alerts are distributed by account, administrators are then able to apply these to specific projects. To set up a new alert or view/edit a current alert, go to the project where you would like the alert results to be imported to and navigate to the *Alerts* tab.



On the *Alerts* page, you will see a table of alerts that are already running, with an option to delete or edit the alert. You can change the name, query, country/kind code, or type of update (i.e. new families only or new families and new members). The table will show the alert details, including the last run date and the last run results. Underneath the alerts table you can check the number of alerts still available for your organisation to use.

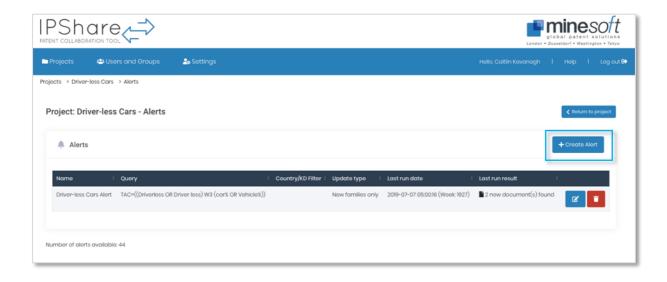


The last run results are clickable. Clicking on them will take you back to your project page and show you the patent number, title of the results and whether they have been imported into your project successfully in a pop-up window.



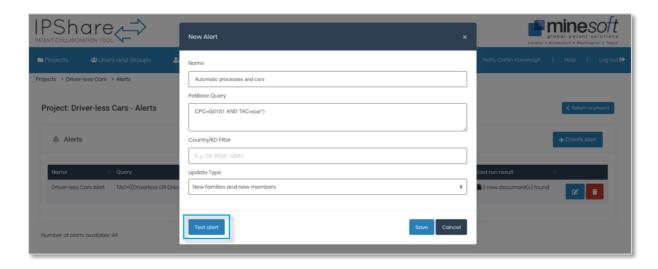
Creating IPShare Alerts

To create an IPShare Alert, click + *Create Alert* above the alerts table.



A pop-up window will appear where you need to enter a name for the alert, a PatBase query* to run the alert, any country/KD filter that you would like to apply or the type of update (new families only or new families and new members).

*You do not need to have a PatBase subscription to run IPShare alerts, but you will need to know how to write a PatBase query. For help on this, please contact support@minesoft.com.

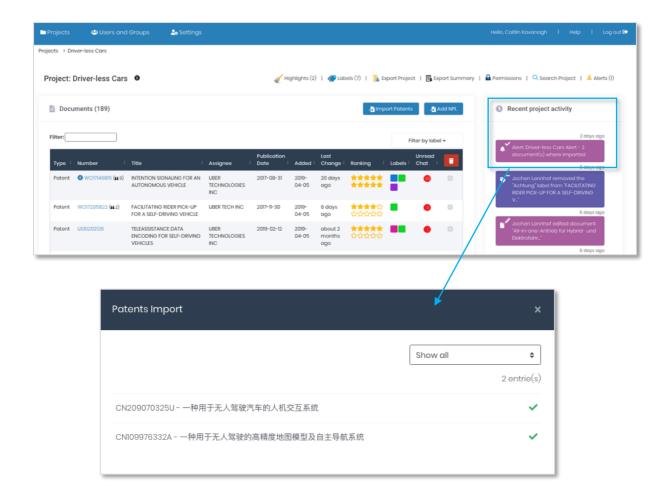


Once you have completed the fields, you can test the alert by clicking on the button in the bottom right-hand corner. If the query is correct, you will see how many results have been found, if it is incorrect, you will receive an error message like below (the message will vary depending on the error):



The Minesoft Support team will be able to assist if you have any problems when setting up an alert.

The alerts will run on a weekly basis and any results will be automatically imported into the relevant project; you can monitor alerts from the *Alerts* page. In addition, the alerts will be included under *Recent project activity*, clicking this will open up a popup window showing the patent number and title for the most recent run results.



Please note: only administrators will have access to the Alerts page, other users will only be able to see alert results from within Recent project activity.

Contact us

If you have any questions about any of the content included in this document or would like to organise an online training session with a member of our support team. Please contact us today on +44 (0)20 8404 0651, or at support@minesoft.com.