

# PatDocs Guide

### **Table of Contents**

ABOUT PATDOCS	3
COVERAGE	3
LOGIN	
CHANGING YOUR PASSWORD.	
ORDER	6
ENTERING NUMBERS IN THE CORRECT FORMAT	
Order Patent Copies	
Generating the front page of patent copies	
GENERATING AN IDS FORM	
CUSTOM LEGAL REPORTS	
Ordering Translations	
THE FAMILY TREE	
Settings	
Export/share options	
Family Tree	16
HISTORY	18
SEARCH	19
BASIC SEARCH	10
ADVANCED SEARCH	
Quantity Search	
Number Search	
VIEWING SEARCH RESULTS	23
RESULTS PAGE	73
Filter results.	
Export results	
Analysis	
Folder	
VIEWING A RECORD	
Full text	
Original PDF	
Status	
Transaction History	
File History	
PTA (Patent Term Adjustments)	
Continuity Data	
Payments	
Assignments	
Family	

Page 1 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

Family Tree	42
ADMINISTRATOR SITE	43
USERS	43
Create a new user	43
Editing users	44
Projects	
Creating a project	
Editing projects	
ALERTS	47
Creating Alerts	47
Editing Alerts	49
Alert Report	50

### **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.

# Coverage

PatDocs currently covers the following jurisdictions and authorities:

Jurisdictions	Document Type	From
AP (ARIPO)	Granted	1985-2005
AT (Austria)	Applications	2005
	Utility Models	1994
	Granted	1990
AU (Australia)	Applications	1900
		1990
	Granted	1967
		1990
BE (Belgium)	Applications	1980
	Granted	2015
BG (Bulgaria)	Applications	1994
	Granted	1994
	Utility Models	1994
BR (Brazil)	Applications	2010
	Utility Models	2009
	Granted	2014
CA (Canada)	Applications	1978
	Granted	1978
CH (Switzerland)	Applications	1980
	Granted	1980
CN (China)	Applications	1985
	Granted	1985
		1990
	Utility Models	1985
CS (Czechoslovakia)	Granted	1980-1993
CZ (Czech Republic)	Applications	1993
	Granted	1993
	Utility Models	1993
DD (former East Germany)	Granted	1980-2003
DE (Germany)	Applications	1987
	Granted	1987
	Utility Models	1999
DK (Denmark)	Applications	1980
	Granted	1980
EA (Eurasia)	Granted	2000
EP (EPO)	Applications	1978
	Granted	1980

ES (Spain)	Patents	2004
	Utility Models	2004
FI (Finland)	Applications	1980
	Granted	1980
FR (France)	Applications	1981
GB (United Kingdom)	Applications	1980
HU (Hungary)	Applications	1980
	Granted	1980
IE (Ireland)	Applications	1990
	Granted	1980
IL (Israel)	Granted	1976
IN (India)	Applications	2004
	Granted	1972
JP (Japan)	Applications	1976
		1993
	Granted	1993
	Utility Models	1994
KR (Republic of Korea)	Applications	1983
	Granted	1979
	Utility Models	1979
LT (Lithuania)	Granted	1994
LU (Luxembourg)	Applications	1980
LV (Latvia)	Granted	1994
MX (Mexico)	Applications	1997-2015
NL (Netherlands)	Applications	1990
	Granted	1997
NZ (New Zealand)	Applications	1978-2012
		2018-
OA (OAPI)	Granted	1980-2007
PL (Poland)	Granted	1924
PT (Portugal)	Applications	1986
	Granted	1986
RO (Romania)	Applications	2011
	Granted	1993
RU (Russian Federation)	Applications	1994
	Granted	1994
	Utility Models	1994
SE (Sweden)	Applications	1973
	Granted	1900
SI (Slovenia)	Granted	1992
SK (Slovakia)	Applications	1993
	Granted	1993
CIL (C. T. III.)	Utility Models	2008
SU (Soviet Union)	Author Certificates and Patents	1924-1993
TH (Thailand)	Applications	1980
TW (Taiwan)	Applications	2003

Page 4 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

	Granted	2000
	Utility Models	2004
US (United States)	Applications	2001
	Granted	1920-1949
		1950-1975
		1976
WO (WIPO)	Applications	1978

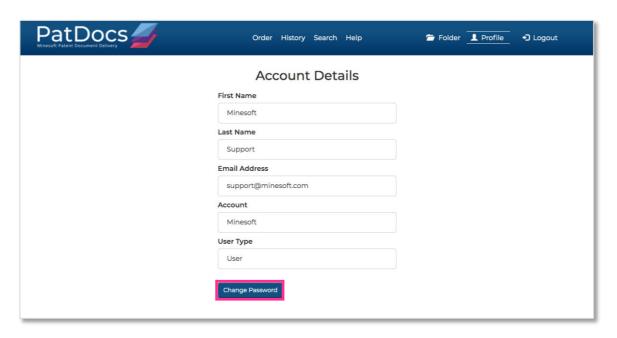
# Login

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

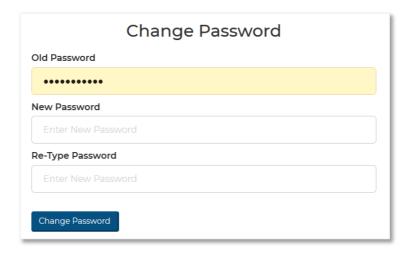


# **Changing your password**

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 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 serial numbers.

#### Example:

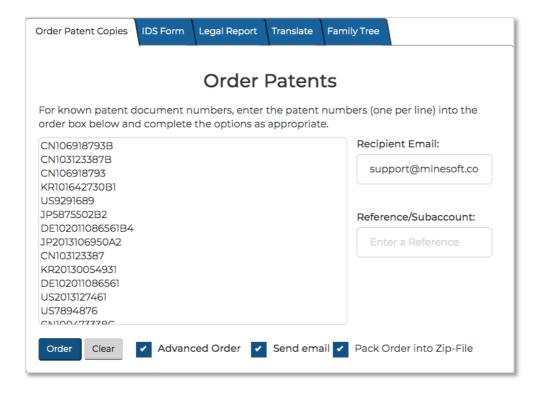
07/395464 09/373089

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 box that reads "Recipient Email" in the "Order Patent Copies" tab of the Order section.

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 next to the Recipient Email box.

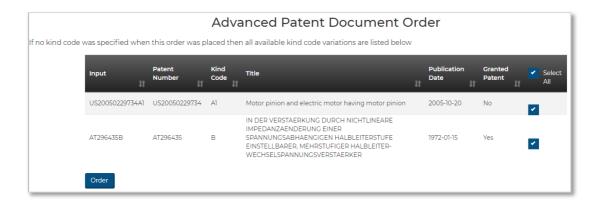
### **Order Patent Copies**



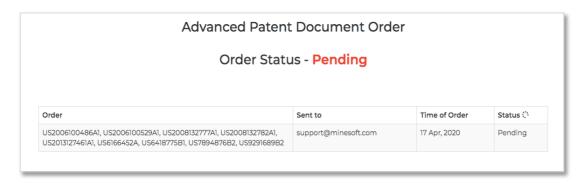
For document orders, there is an option on the right-hand side of the page in the form of a checkbox to include a zip file containing all of the documents ordered - on top of the list of links to the PDF files sent by default.

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.

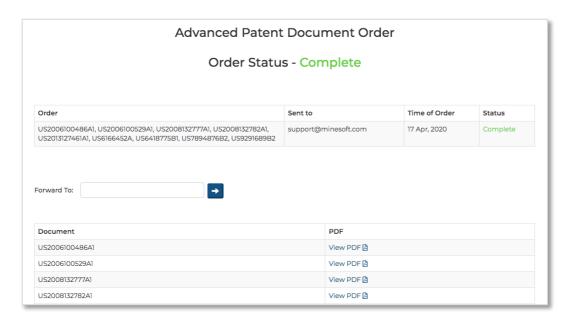


On submitting your order, you will be redirected to a page displaying the status of your order. This page will automatically refresh every few seconds until the order is complete.



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.



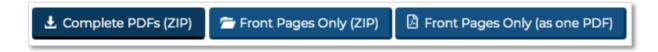
From this Order Status page, you can directly forward links to any email address. This page is also accessible from the history page, so you don't need to wait around for the order to complete; you can come back to and view this order at any time.

### 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.

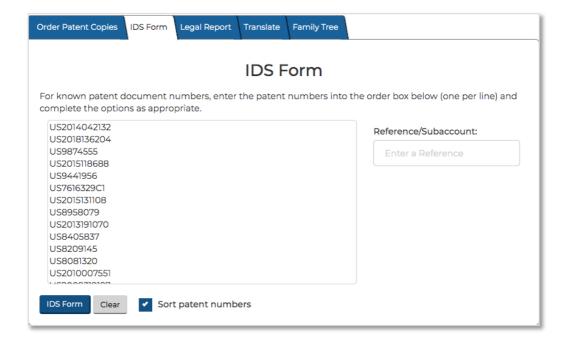
Once complete, at the bottom of the page you will have three options:

- 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 Only (as one PDF) Downloads only the first page of each patent and saves them all into one single PDF file.

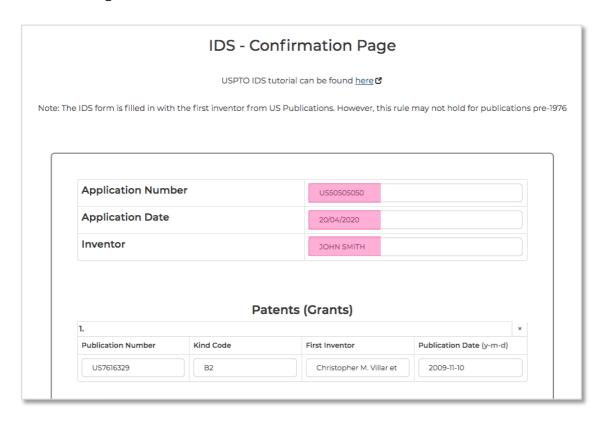


## **Generating an IDS Form**

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.



Page 10 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

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 these fields are editable.

Scroll down below the numbers, you 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.

DR. JANE DOE, PATDOCS TEST, BOOK, 01/	'01/20, P10-12, LONDON, UK
Increase the limit of exported	Generate IDS
documents per PDF file 🕄	Export to Excel
	S form(s), Adobe Acrobat Reader is required.

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

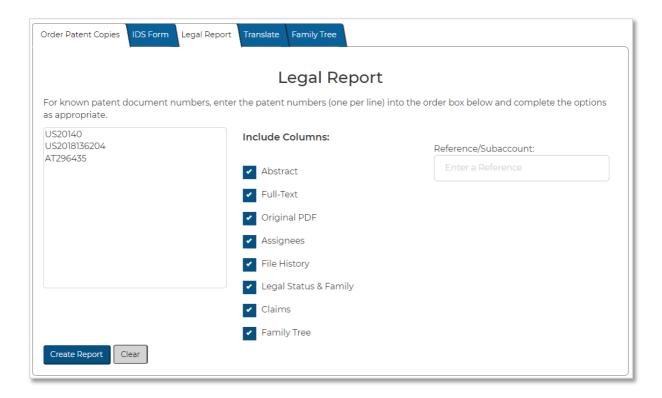
Any numbers not found will be listed at the top of the page. They will still be included in the format they were entered; however, the Publication Number will be the only filled in field.

Once you are happy with your form, click on the "Generate IDS" 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**

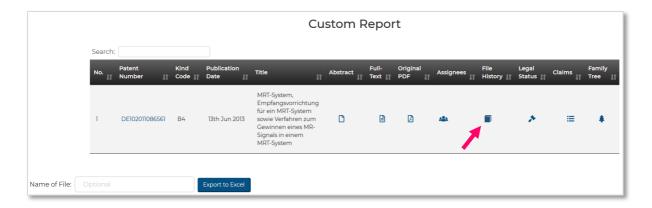
To create a custom legal report, go to the "Legal Report" tab and enter the relevant patent numbers.



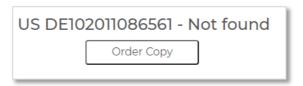
Next to the number input box, there is a list of checkboxes. These are the options for the columns that you may include in your custom report.

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

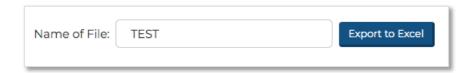
If you then click "Create Report", PatDocs will generate a report table with links to all the columns that were requested.



For file histories that PatDocs has not found, clicking the book icon will create a new tab with a button 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.

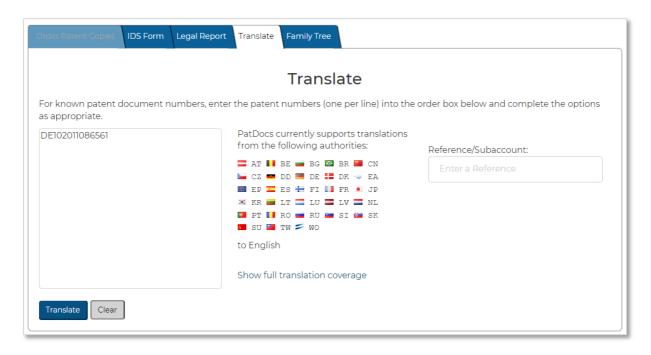


If you are exporting a large report, once you press the "Export to Excel" button, a tab will open (so you can leave the results table page if you want) and once PatDocs has finished generating the Excel file it will automatically download and close that tab.

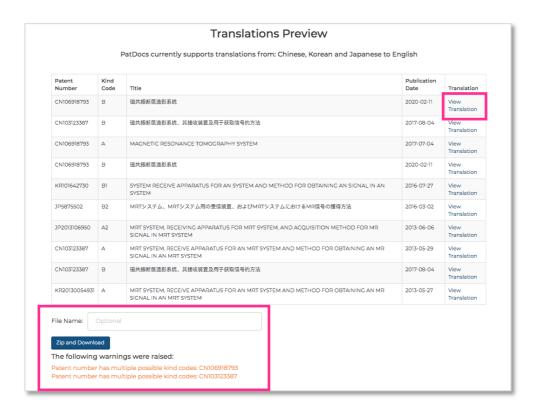
If you want to share that Excel file to non-PatDocs users, the links within the file will still work.

## **Ordering Translations**

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



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



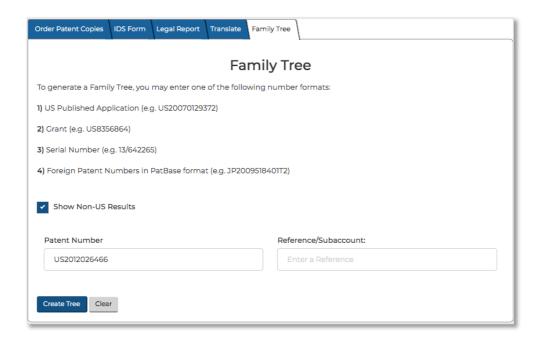
If a translation is not found, it will not be in the table on this page. We will list the unavailable numbers below that table.

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 published application number, a grant number, a serial number, or foreign patent number in Espacenet 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 Bar" area by clicking on the arrow icon in the centre of the page, immediately below the Settings Bar.

## **Export/share options**

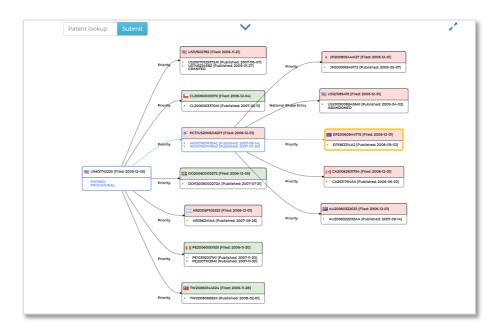
The Family Tree can be exported in various formats by clicking on the "Export" button, found in the button group in the top-right of the Settings area.

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.



Page 16 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

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

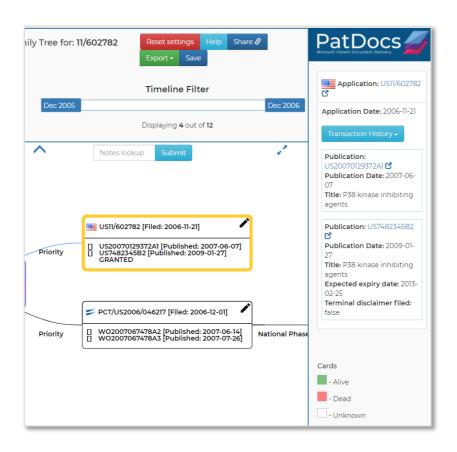
To highlight paths within the Family Tree, click on a card to highlight all of that patent's parents and children. You can hide the unselected via the Settings area.



To 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.

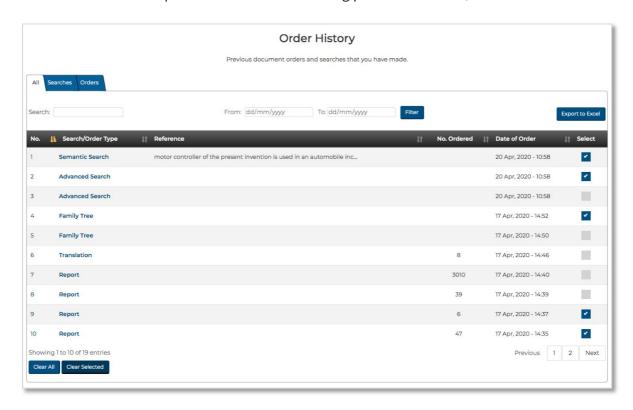


Page 17 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

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.

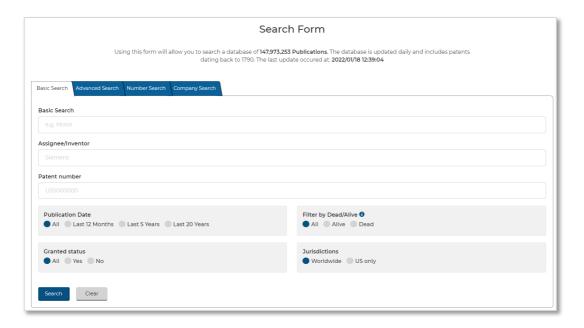


You can export your full "Order History" by clicking the "Export to Excel" button at the top-right of the page.

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.

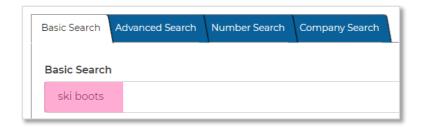
#### Search

There are various types of searches in PatDocs: Basic Search, Advanced Search (including quantity search), Number Search, and Company Search. In PatDocs, you can search across international patent documents. Data in PatDocs is updated daily.

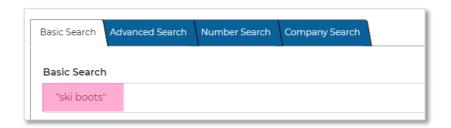


#### **Basic Search**

The "Basic Search" offers a fast and simple way to run a keyword, assignee/inventor and/or patent number 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.



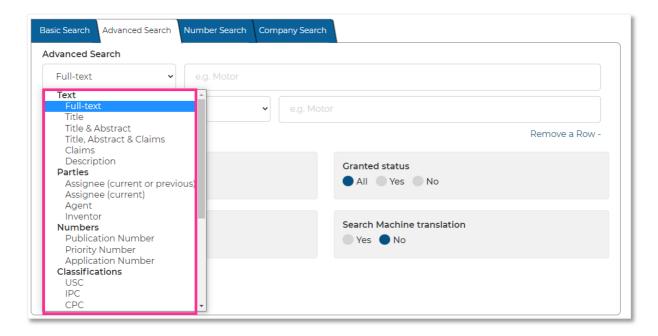
Page 19 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

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".

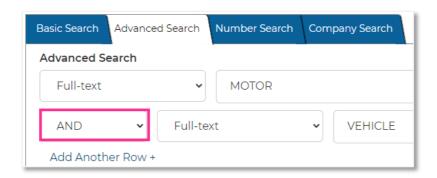
#### **Advanced Search**

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

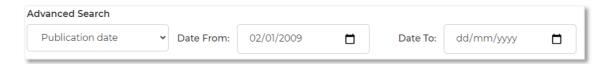
Begin by choosing what area of text or bibliographic information you want to search from the dropdown menu next to the search bar.



You can also combine the Boolean operators within the fields, for example "MOTOR **AND** VEHICLE". Select "Add Another 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".



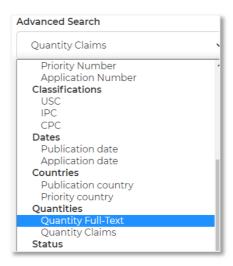
It's possible to filter by publication or application dates, searching by date range or with an exact date.

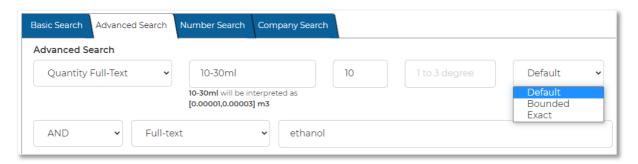


Some other options on the "Advanced Search" form include filtering by whether the publication is dead or alive, granted or not, being searched worldwide and/or with machine translations. The definition of an alive patent is whether its expected expiration date is in the future. A patent's expected expiration date is determined from its expected term length, considering 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.

### **Quantity Search**

One of the options in the Advanced Search form is the quantity search, accessible by selecting either Quantity Full-Text or Quantity Claims. This option allows you to specify quantities and combine these with an advanced search.





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

The number selection box between the two quantity fields allows 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".

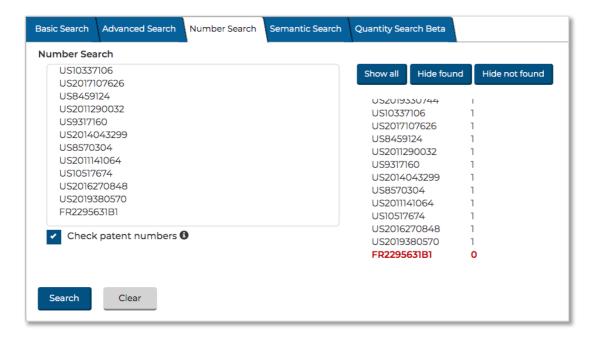
The "Qualifier" column essentially allows you to select how "narrow" or "broad" your results are:

- 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 also combine this option with dates.

#### **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.



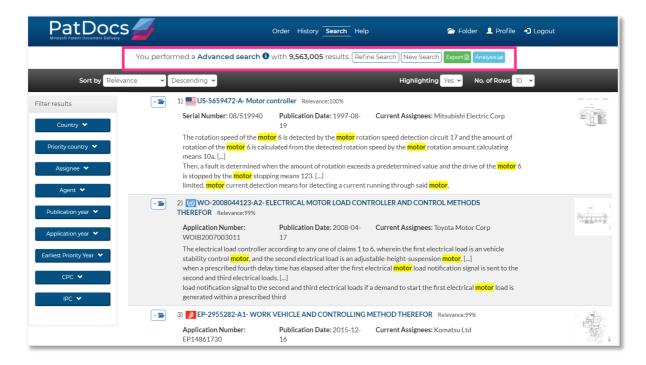
Select the "Check patent numbers" checkbox to view all numbers, found/not found numbers or ambiguous numbers. They will appear either in black, with the number of hits next to them, on the right-hand side, or in red next to a zero in case they are not found.

## **Viewing search results**

### **Results page**

Regardless of which search form you use; the results page is displayed the same way. 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 run 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 "Relevance" which refers to the relevance of each hit. This percentage for each publication is located next to its 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.

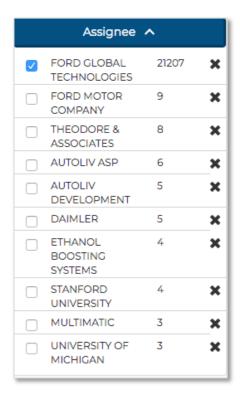


Each hit will display the publication number, title, and the "Relevance". In addition, the serial number, publication date, current assignees, an excerpt from the abstract and a drawing are also featured.

#### Filter results

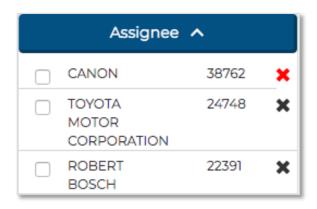
It's possible to filter your results by "Country", "Priority country", "Assignee", "Agent", "Publication year", "Application year", "Earliest Priority Year", "CPC" and "IPC". You have the option to include or remove specific assignees, classification codes, etc.

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.

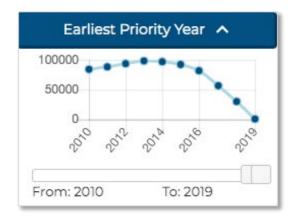
To remove an assignee name, select the cross next to the name you want to remove. The cross will then be shown in red, so you know this assignee has been removed from the result set.



The filter by year (earliest priority, publication or application) option works 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:



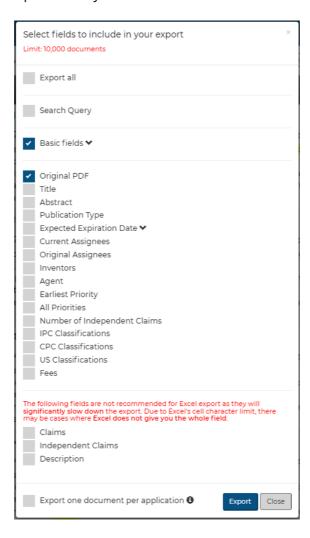
Select "Remove filters" at the bottom of "Filter results" to remove all filters.

### **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.

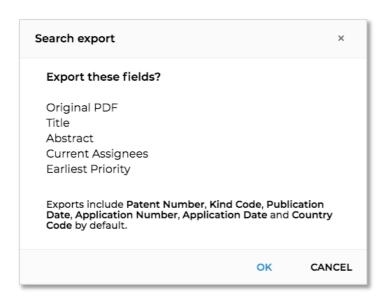


By default, all exports will include patent number, kind code, publication date, application date, application number and country code.

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.

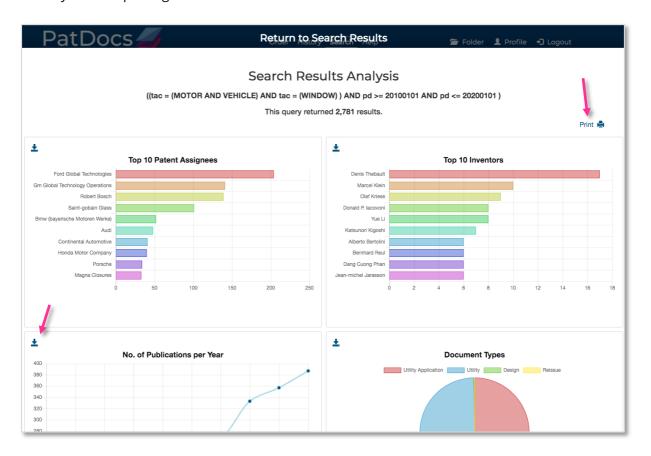
A new tab will open showing the progress of your download. This means that you can continue with other work on PatDocs while the export is downloading.

## **Analysis**

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

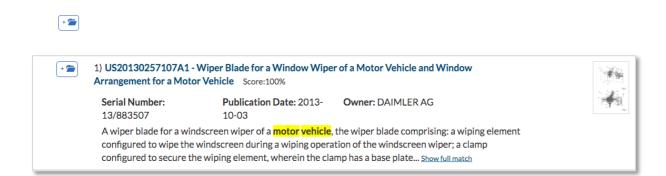


The graphs shown under analysis include "Top 10 Patent Assignees", "Top 10 Inventors", "No. of Publications per Year", "Document Types", "Top 10 CPC (Subclass)", "Top 10 PCs", "Priority Country" and "Top 10 Agents".



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**



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

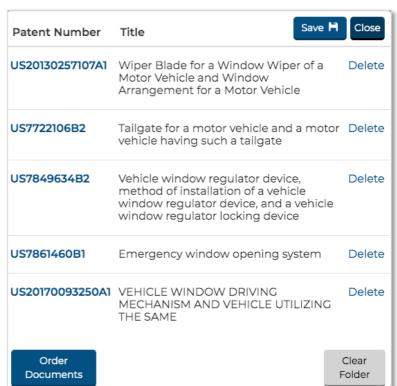


If you want to save your folder for the next time you log in, press the "Save" button within the folder.

You can delete the documents that you don't need individually or select "Clear Folder" to delete all documents in the folder.

You can input these documents into the order page by selecting "Order Documents", any of the ordering options for the documents can then be used.

Select the hyperlinked patent number to be taken to the full text for that document in a new tab.



## Viewing a record

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

1) US5592588A - Method and apparatus for object-oriented digital audio signal processing using a chain of sound objects Score:100%

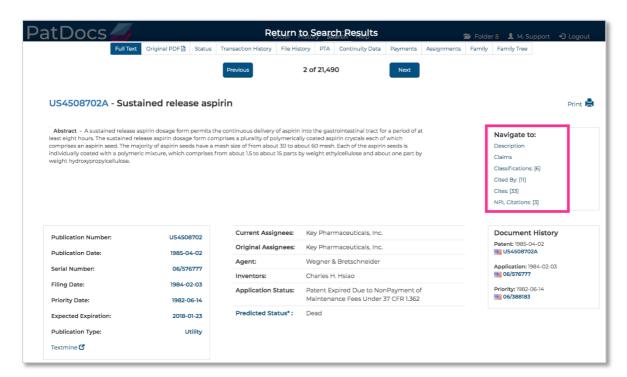
#### **Full text**



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:

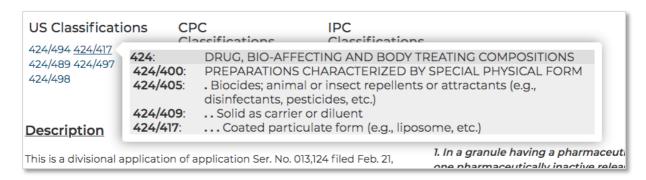
- Title
- Abstract
- Bibliographic information
- Document history
- Description
- Claims
- Classifications
- Cited by
- Cites
- NPL citations

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



## Classifications

Clicking on the classification codes will open up 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.

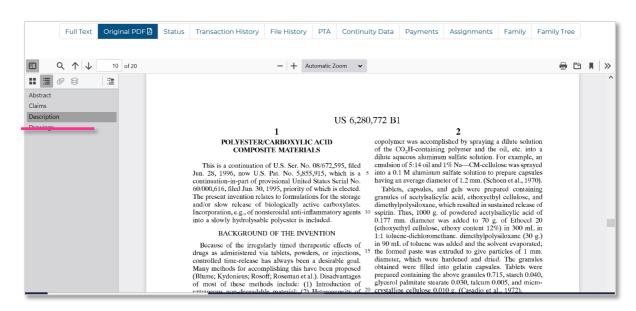
8. A granule prepared according to a process for producing a preparation comprising a plurality of granules each having a core and a unitary layer thereon containing at least one pharmaceutically active material which, on disintegration, release said pharmaceutically active material at a controlled rate, 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 claim 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.

Cites		
Publication	Title	Published
US-5551954-A	Biodegradable drug delivery vascular stent	1996-09-03
US-5543156-A 🗹	Bioerodible devices and compositions for diffusional release of agents	1996-08-06
US-5518730-A 🗹	Biodegradable controlled release flash flow melt-spun delivery system	1996-05-21
US-5487897-A <b></b>	Biodegradable implant precursor	1996-01-30

## **Original PDF**



Original PDF opens the original publication as a PDF. Scroll through the different sections by accessing them on the left-hand side: abstract, biblio, claims, description, drawings.

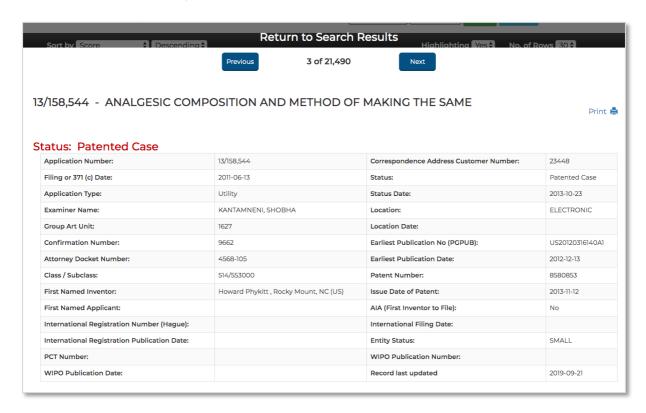
#### **Status**



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

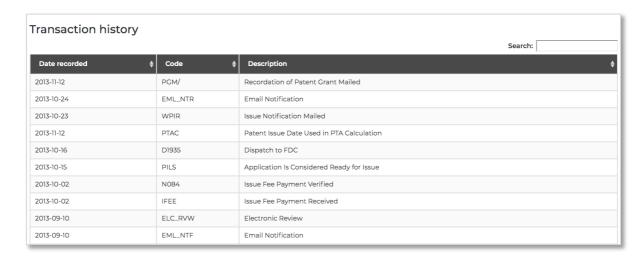
- Filing or 371 (c) date
- Examiner name
- · Group art unit
- Confirmation number
- Attorney docket number
- Etc.

All this data is taken directly from IFI and the USPTO.



## **Transaction History**

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



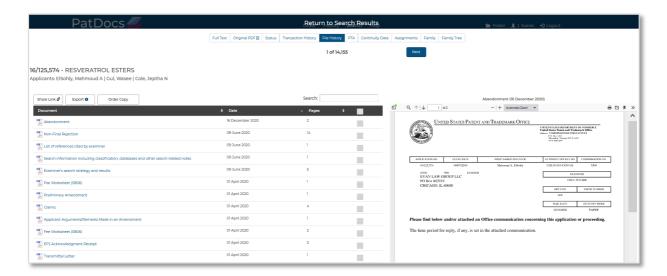
The table is searchable by date, code or description and can be sorted by date (ascending/descending), code (alphabetical order) and description (alphabetical order).

### **File History**

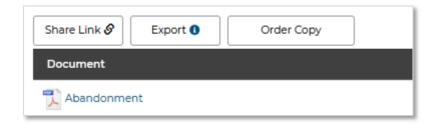


The file history lists all communications and documents related to the publication. These are displayed in a side-by-side view making it easier to review multiple documents at once.

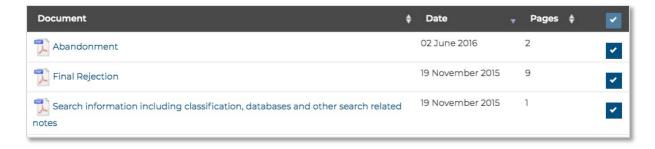
The table of documents is completely searchable and can be sorted by document (alphabetical), date (ascending/descending) or number of pages (ascending/descending).



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.

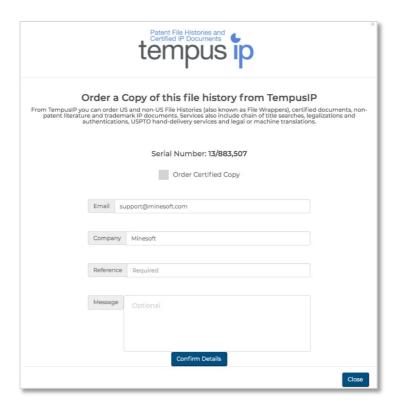


Use the checkboxes next to each document to individually select them.



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.

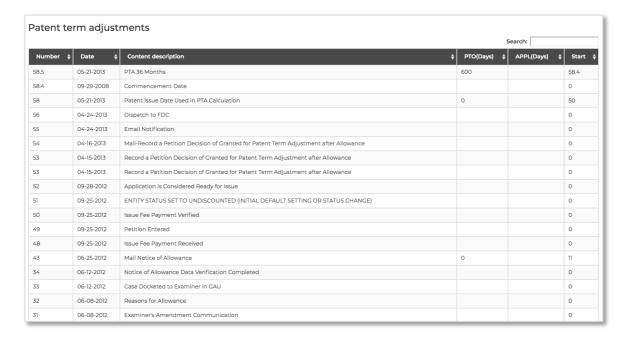


Page 36 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

### PTA (Patent Term Adjustments)



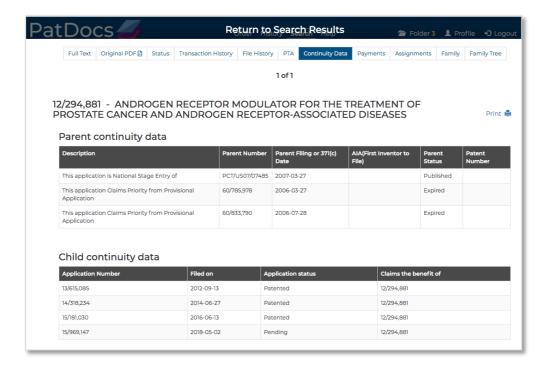
The PTA page shows an overview of patent term adjustment events in a table format. The table is completely searchable and can be sorted by number (ascending/descending), date (ascending/descending), content description (alphabetical order), PTO (ascending/descending) APPL (ascending/descending) and Start (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.



### **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 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 and is available for US documents.

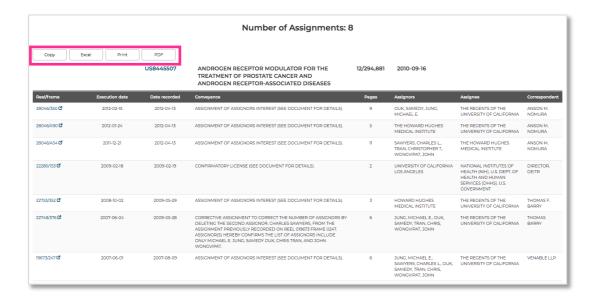


Page 38 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

### **Assignments**

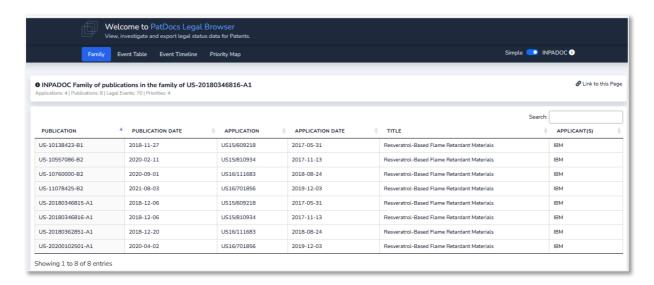


The Assignments tab contains all assignment information for the publication in a table view. The rows of the table can be copied to the clipboard, exported as an Excel or PDF file and printed. Any downloads will include the "Date Downloaded" as well as all data in the table. Clicking on the hyperlinks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

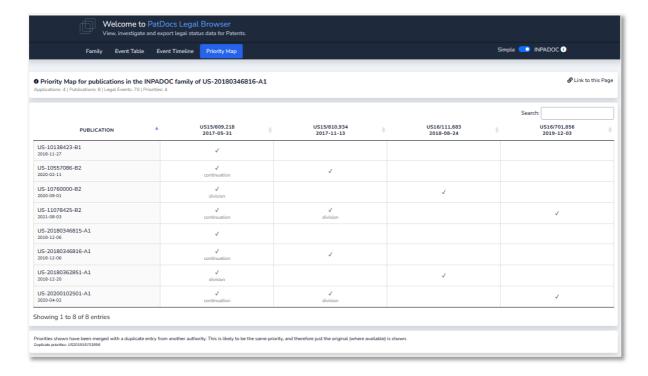


The PatDocs Legal Browser provides four views in the tabs shown at the top: Family, Event Table, Event Timeline and Priority Map.

# PatDocs Legal Browser

### Priority Map

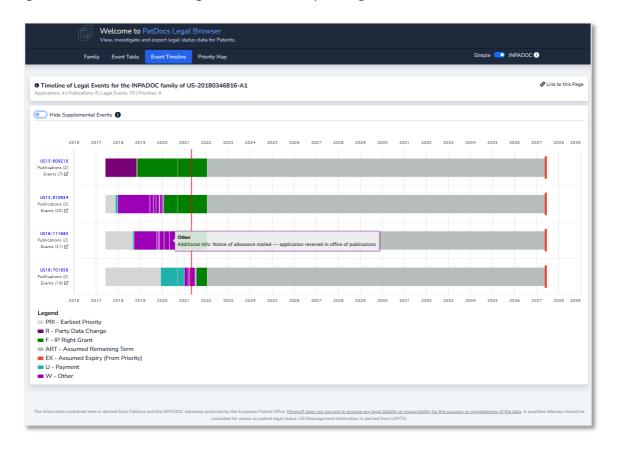
The Priority Map in PatDocs Legal Browser will show the Publication numbers on the left-hand side and the priority numbers associated with each one in the adjacent columns. This is useful for seeing which priority numbers are most common within a family. The columns also show the priority dates.



The table can be ordered by alphabetical and ascending or descending order, depending on the column.

### **Event Timeline view**

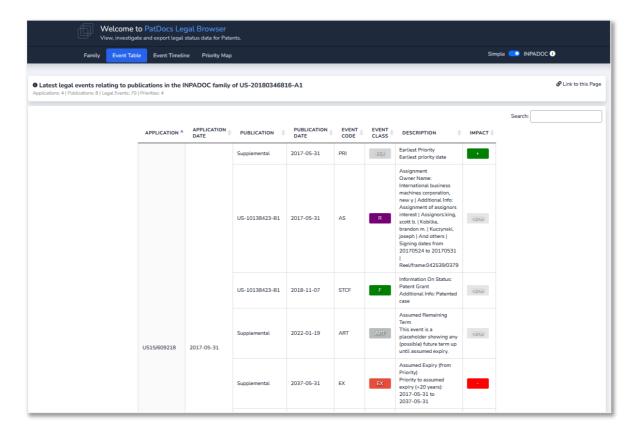
The event timeline view shows the legal status history of each application in a family, with a legend at the bottom detailing the events corresponding to the colours.



There's also a toggle to hide supplemental events at the top-left corner and an option that reads "link to this page" that allows users to copy a shareable link to the clipboard. Clicking on the title of the timeline in bold will open a modal that displays bibliographical data.

#### **Event Table View**

The Event Table view shows the application number, application date, publication number, publication date, event code, event class, event description and impact for each publication within the family.



The event code is the official legal status code used by the patent office in question or INPADOC. The event class adds different event codes into categories.

The table can be sorted by clicking on the arrows next to the relevant header.

Above the table, there is a bar to search within the table and an option to filter by simple families. Clicking on the title in bold will display the bibliographical data.

### 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**

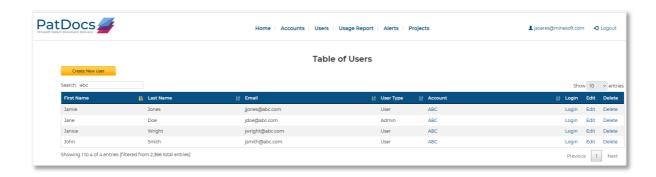
The administrator website is only accessible by administrators on the account. From this area, you can manage your users, view a usage report for your account, set up alerts and create separate projects (for your alerts).

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 <a href="mailto:support@minesoft.com">support@minesoft.com</a> or your account manager.

You can sort the table by first name, last name, email address, user type and account. 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 the case below, 1) and the number of seats remaining (in the case below, 0). If you require more user IDs, please get in touch with your account manager.

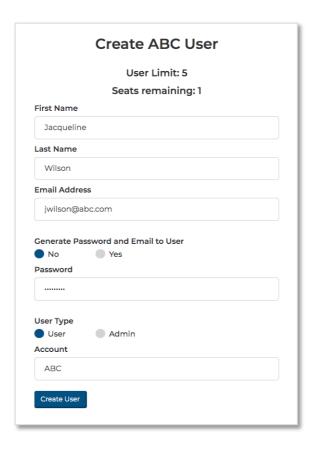
# User Limit: 1 Seats Remaining: 0

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.

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**

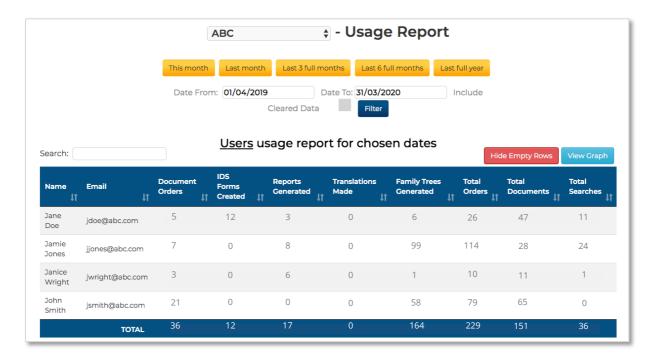
To edit a user, select "Edit" on the corresponding row of the table.



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



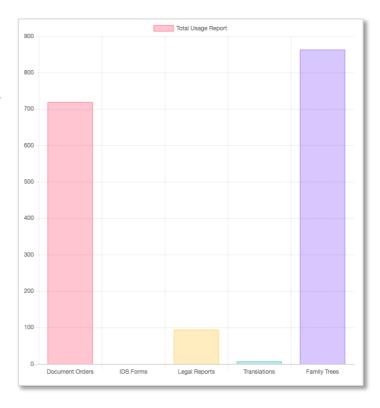
The usage report shows a breakdown of all users' usage on your account by number of documents ordered, IDS forms created, reports generated, translations ordered, and family trees generated. This can be filtered by the current month, the last month, the last 3 full months, the last 6 full months or the 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.



Page 45 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

# **Projects**

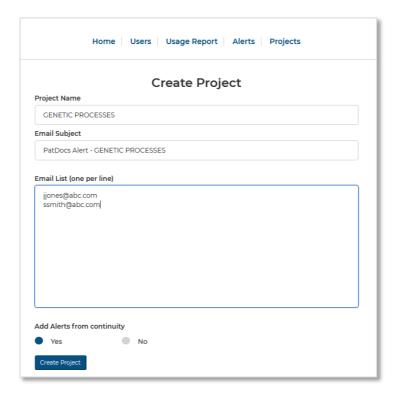
Projects in PatDocs are used to assign recipients for the PAIR Alerts.



# Creating a project

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

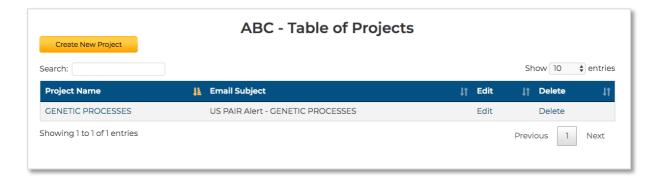
You'll be taken to a new page where you can choose a name for the project, a subject line for the alert emails, enter a list of emails (these are the recipients for the project) and choose whether to add alerts from continuity.



Click "Create Project" to save the project.

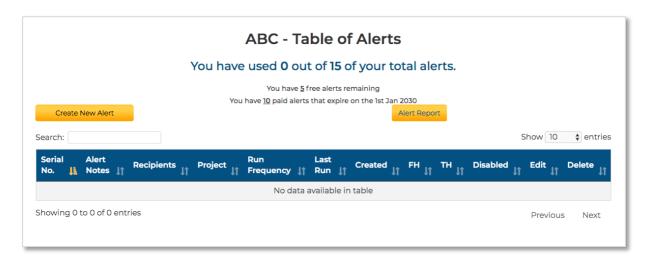
Please note, the emails you enter don't need to be PatDocs' users and there's no limit on number of emails added.

### **Editing projects**



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

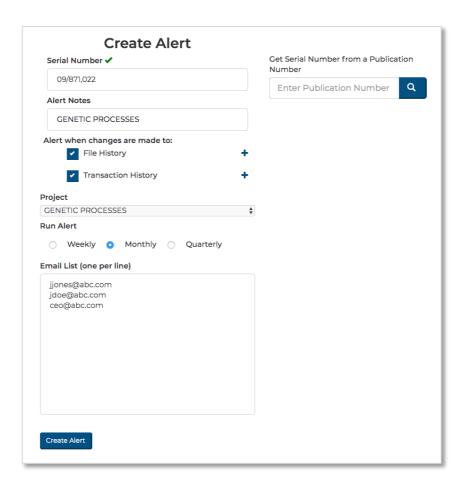
## **Alerts**



All PatDocs accounts include 5 free alerts and additional paid alerts can be included. Contact your account manager or <a href="mailto:support@minesoft.com">support@minesoft.com</a> to enquire about setting up additional alerts.

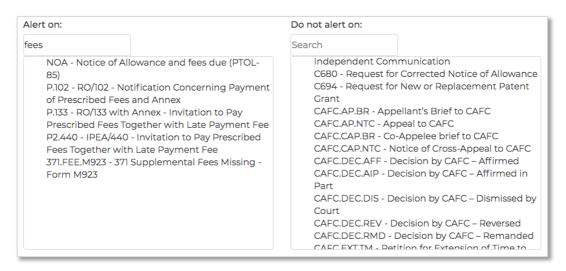
### **Creating Alerts**

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 changes 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.

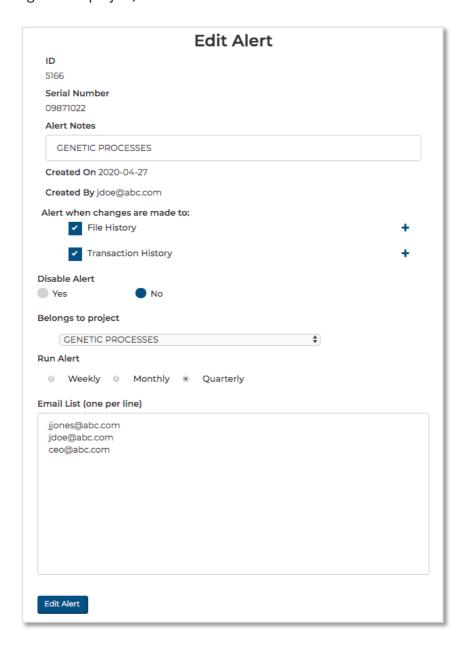


### **Editing Alerts**

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).



Page 49 of 50
PatDocs Guide
support@minesoft.com
Last updated January 2022

# **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.

