Brügmann

PatOrg Smart Letter & @-Instructions

Easy & efficient

PatOrg is featured with sophisticated letter generation technology based on instructions. They facilitate to use easily all kind of data stored in PatOrg. Designed for efficient processing of IP data with PatOrg, the instructions follow a clear and catchy structure enabling to create letter templates without special IT skills. Instructions can be simply embedded as text in any Microsoft Word document, as for instance:

@C15cA (PUB, APP)@

The first three characters refer to a group of fields. „C15" is the 15th field group of a case record. „A" tells that this instruction outputs some information. There are also „Q" instructions which allow for checking or comparing data. The brackets include parameters. In this case the parameters are field identifies. The instruction above just puts the content of the field with Id "PUB" containing the publication number. If there is no value for this field the content of the field with Id "APP" is shown instead if available.

- Templates can be created and maintained by paralegals without special IT skills.
- Neither SQL nor Microsoft Word merge method are necessary to define templates.

@§SENDER@

@§ADDRESSER@

@§DATE@

@>W15bQPICT@
@X4oaAPIC@@<@

@§SUBJECT@

@X10aCSALUTATION@

Please be informed that in accordance with your order letter of @C01d

international patent application was filed with the European Patent Of

on

@C15dAANMFb@

The international patent application was assigned the official filing nur

@C15aAANM@.

All states which are presently member states of the PCT have been desi

@C14aCPRI@@>C14aQPRI==0@No priority has been claimed.@<@
@>C14aQPRI>>0@The following @>C14aQPRI==1@priority
has@<@@@>C14aQPRI>>1@priorities have@<@ been claimed:

Active instructions rather than placeholders

PatOrg's letter generation technology is based on active instructions. For instance, there are instructions providing to request information from the user via dialog boxes that can be also incorporated in letter templates. Moreover, PatOrg offers instructions for processing data (e.g. string and date operations).

To give an example, the instruction included in the following sentence reads the application date from the case, sets seven years off and puts the date in format b (=dd <month> yyyy)

„The 7 year period within examination request in Germany must be filed ends on @C15dAAPP+007YFb@."

Depending on the application date the execution of the instruction might result in the following sentence:

"The 7 year period within examination request in Germany must be filed ends on 20 March 2018."

- Specific adaption of data for the respective need.
- Easy handling without programming Microsoft Word Macros.

Why is the technology for letter generation a crucial quality feature for IP Management Software?

Only data that is easily available for document templates can and will be used for letter generation in practice. For instance, does a letter informing about the grant of a patent, explains in addition potential next courses of action including terms and prices, recipients will highly appreciate this information. At the same time this saves costs since further typical inquiries on this matter are potentially reduced.

The quality of letters indicates the performance of the organisation. Are they
- well designed,
- drafted elaborately, as written by hand,
- and addressing specifically and comprehensively the respective matter,

recipients feel in good hands.

Particularly for law firms handling complex matters with a high document throughput PatOrg's cutting-edge letter generation technology offer a striking means to improve business performance.

Communication and workflows are mission critical for organisations. Supporting technology should thus provide great functionality and enable users to adapt the individual setting flexibly at any time according to
- user needs
- client requests
- process improvments
- and changes in official procedures.

Conditional adding and hiding of text passages

Pieces of text can be flexibly shown or hided depending on the values of arbitrary record fields or user input in dialog boxes. So, for instance, the passage "with request for accelerated examination" is only introduced if the option with Id 'ACE' is set to true in the respective case record.

"... we thank you for your letter from @§ORDERDATE@ und certify that we today filed your trademark application @>C16aQACE=T@with request for accelerated examination@<C16@for the named above trademark for the following classes of goods and services @§NICECLASSES@."

- The number of templates is substantially reduced since variants do not require separate templates.
- Even highly individual letters can be generated fully automatically, if they had been created with big effort manually especially for the situation and recipient.
- Due to the short instructions, the textual information is still easy to grasp in templates.

Formatting

As the instruction is formatted, the text resulting from generation will be. So a passage in a template like

"... the applicant of the opposed trademark rejects the use of your trademark "@§TRADEMARKTITLE@"."

will result in the following for a trademark with the name „Ammaria":

"... the applicant of the opposed trademark rejects the use of your trademark "Ammaria"."

- Text formatting can be done as for usual text.

Specific subject text formulation

Special functionality PatOrg offers to generate subject text. Depending on matter type, cases status and state of processing appropriate subject text templates can be defined. So e.g. by only a few instructions enclosed in a user-defined PatOrg Egomacro Instruction named "EP_SUBJECT2 PatOrg is able to generate subject texts as shown below for an EP application:

"New European Patent Application"
                        before filing,
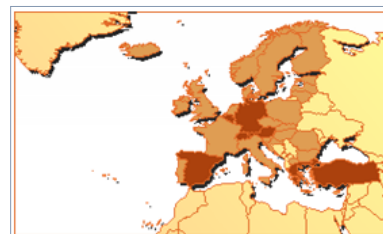
"Patent Application No EP2012387949"
                        after filing,

"Regional phase in FR based on PCT/EP1384093 "
                        after filing in EP validation proceeding.

- Easy definition of specific subject texts depending on matter type, case status and state of proceeding.

Graphics and maps

PatOrg provides to embed content of other documents stored in PatOrg's DMS in documents as e.g. index of goods or graphics via special instructions. So, letters can be easily enhanced by trademarks and patent drawings. There is even an instruction to create dynamically maps which can be used for example to illustrate the status of a patent family in a special region or the whole world.

- Letters can be refined by graphics and visualizations and thus reevaluate the document for the recipient.

Links

Another instruction makes it possible to generate and embed hyperlinks by dynamically composing web addresses from case data. For instance, this functionality can be leveraged to link patent numbers in documents to web pages of online patent registers. By just one click recipients are facilitated to conveniently access additional information. This functionality can also be used to link to PatOrg's IP Portal or other Online Services.

EP2657560
Piston rod for a hydraulic cylinder

Dear Sirs,

Please note that the publication of the European

Dialogs

Additional data that is needed for letter generation but not stored in PatOrg (in general or only for the respective case or person) can be requested via dialog box from the user in the scope of processing. The instructions for this purpose can also be included in the text, so that the document contains all the content as well as the instructions for building it. Instructions for asking data from the user provide to read all kind of information ranging from strings, numbers and Boolean options to amounts. Also records can be searched and selected (e.g. cases or persons) to subsequently use information from them.

Generation of PDF forms

Based on the Microsoft Word template PatOrg facilitates to generate interactive PDF forms. By means of instructions text fields, checkboxes and option fields can be included. There is also a special instruction for placing a button for locking and sending the document back to the sender. PDF forms are a valuable means for making communications with respect to usual matters more efficient, as e.g. enquiries regarding requests for examination or granting and particularly annuities.

- Standardized communication
- Efficient, electronic processing of communication
- Automatic generation of PDF forms tailored to the occasion and recipient
- Generation of PDF documents and forms without additional software

Fast & Stable

PatOrg's cutting edge technology for generating documents is able to create documents in docx-, doc-, odt-, eml- or pdf- Format, underline without using other software as Microsoft Word/Outlook, Open-/Libre-Office or Adobe Acrobat. So PatOrg creates documents on its own and just passes the final document to the respective software after all included instructions are executed. Is there an instruction that cannot be successfully applied (due to syntax errors, missing data, etc.) an Word annotation connected to the instruction is created informing about the problem.

- Fast: no third party software is involved.
- Reliable: no third party software must be controlled to create documents.
- Robust: Problems are reported by annotations.
- Compatible: Works with all Office Versions starting from 2003

Quick updates

PatOrgs instructions are application oriented and thus refer to PatOrg basically from user's perspective. Read and write operations in the scope of document generations and workflows are completely done by means of instructions. So the complex Oracle database structure is hidden for the user and cannot be accessed directly. Software improvements and enhancements concerning the database do thus not affect any configuration because the instructions are updated by Brügmann Software accordingly and remain stable for users. Since direct database access is avoided, PatOrg's instructions furthermore ensure the application of configured access rights.
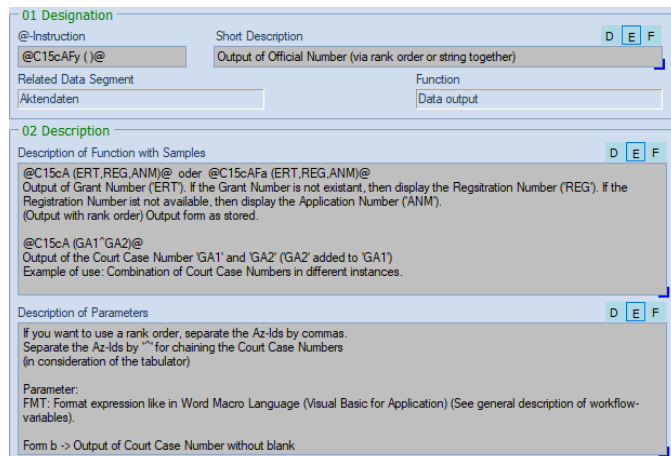
- Quick and hassle-free software updates: Individual configuration is not affected.
- No impermissible access to the Oracle database by means of SQL.

Easy to learn & well documented

For each instruction there is a comprehensive explanation including examples for its application. PatOrg's sample configurations include moreover various letter templates showing how to use the technology. To get quickly familiar with instructions Brügmann Software offers also seminars for paralegals and PatOrg administrators.
(https://patorg.de/de/landing-2-2/#training)

- Flexibility: Since letter templates and workflows can be modified internally by skilled paralegals, they can be adapted or refined instantly according to user needs.

- Minimizing costs: Letter templates and workflows can be basically created and modified without support of Brügmann Software GmbH or external database experts.

01 Designation

@-Instruction	Short Description	D E F
@C15cAFy ( )@	Output of Official Number (via rank order or string together)	

Related Data Segment	Function
Aktendaten	Data output

02 Description

Description of Function with Samples   D E F

@C15cA (ERT,REG,ANM)@ oder @C15cAFa (ERT,REG,ANM)@
Output of Grant Number ('ERT'). If the Grant Number is not existant, then display the Regsitration Number ('REG'). If the Registration Number ist not available, then display the Application Number ('ANM').
(Output with rank order) Output form as stored.

@C15cA (GA1^GA2)@
Output of the Court Case Number 'GA1' and 'GA2' ('GA2' added to 'GA1')
Example of use: Combination of Court Case Numbers in different instances.

Description of Parameters   D E F

If you want to use a rank order, separate the Az-Ids by commas.
Separate the Az-Ids by '^' for chaining the Court Case Numbers
(in consideration of the tabulator)

Parameter:
FMT: Format expression like in Word Macro Language (Visual Basic for Application) (See general description of workflow-variables).

Form b -> Output of Court Case Number without blank