

## Quick start guide

### Create cases via the case family

1. Starting from a completely displayed case data set, open an existing case family or create a new one via the menu "Linked Programs", "Show Record Family" or "Create Record Family"
2. A case family list will be shown according to the current status. The time offset when creating case family members and assigning the origin of new cases is taken into account in the so-called "level numbers" and is displayed by indenting corresponding lines in the family view. In the example below, the German first application has level 1, the PCT subsequent application made for this purpose has level 2, and the PCT nationalizations resulting from this in turn mark level 3.

Family Key: A10002							
Our Reference	Lev	St	Rel	Grp	M.T ...	Ctry	
A10002	1	F.			PT DE		03/05/2002 102 19 966.3
A10002WO	2	F.	PMP		PT WO		AE AG AL AM AT AZ BA BB BG BR BY BZ CA CO CR CU CZ DK D 06/03/2003 PCT/EP03/02272
A10002AU	3	F.	BEN		PT AU		06/03/2003 2003210421
A10002CN	3	F.	BEN		PT CN		06/03/2003 03813437.3
A10002US	3	F.	BEN		PT US		06/03/2003 10/514,187
A10002EP	3	G.	BEN		PT EP		AT BE BG CH CY CZ DE DK EE ES FI FR GB GR HU IE IT LI LU M 06/03/2003 03 747 351.9

3. When clicking on the "Modify" button the screen switches to modification mode. After clicking on the "Select source-case in line XY" button you can click on the button "Add Line". The following columns must be filled manually: Rel column (relation); M.T Gr11 (type of case) column; Ctry (country) column.

Then, by pressing the "P" button (Create parallel Cases) the parallel cases will be created. A window to select the local agent for each individual country pops-up. By selecting a person and clicking on the Proceed button, the local agent is saved in the case.

4. An extension of the case family for EP validation can be achieved as described in step 3. Since this would be very costly in many aspects, PatOrg offers the validation function. This requires that a case with designated countries, in this example an EP patent is selected as source file. Validation is started by clicking the "N" button.

For further questions, please contact our support team by phone +49 (0) 4962 9119-0.