Quick start guide

Create cases (first case of a case family)

1. Select the case management via the main menu or from another data management.

2. A search filter to case search is displayed. The case creation is initiated by clicking the button "Create" or by pressing the F5 function key.

3. A dialog window is displayed for entering the codes of the Matter Type and of the application country code for the new case. If both input codes are known, they can be entered directly. If more information is required for this purpose, the user can left-click the ⤢ symbol (info-corner) in the corner of any of both fields to get a list or a search filter for possible input values. The selected values can be transferred to the fields of the dialog window by left-clicking on the ⟳ button.

4. By pressing the Proceed button, PatOrg determines one or more case masks. If only one matching case mask is determined, PatOrg continues with step 5. Otherwise all matching case masks are offered in a list for selection. Furthermore, the country-independent case mask, which is marked with the generic country code ~~ is displayed. According to the situation and requirement the desired mask can be selected by double clicking it, clicking the „Field-Info" button, or by using the keyboard shortcut Shift + F4.

Id.	Description	MtTp	Field Groups
PTEP	European patent	PT	01, 02, 14, 15, 03, 04,
PTEPPCT	European Patent (EP) from PCT	PT	01, 02, 14, 15, 03, 04,
PTEPTLG	European patent (EP) - division	PT-TLG	01, 02, 14, 15, 03, 04,
PT~~	National patent abroad (subsequent application)	PT	01, 02, 14, 15, 11, 16,
PT~~EAN	National patent abroad - first filing	PT	01, 02, 15, 11, 16, 10,
PT~~EPN	National patent from EP	PT	01, 02, 14, 15, 11, 16,
PT~~PCT	National patent abroad from PCT	PT	01, 02, 14, 15, 11, 16,
PT~~TLG	National patent abroad - division	PT-TLG	01, 02, 14, 15, 11, 16,
PT~~WEN	National patent from PCT/EP	PT	01, 02, 14, 15, 11, 16,

5. Afterwards an empty case mask, with suitable fields corresponding to the selected mask, is displayed and is ready for data entry.

6. Saving the case by clicking the button "Save" or pressing the F12 function key.

After saving a new case, various other data relating the case can be entered and workflow can be started. For example, due dates docketing, form letter processing, document import, service recording, billing, online filing.

In the following, only the most important case fields are going to be explained. For more information about data fields, see the context-sensitive PatOrg help system, which can be opened at any time through the "?" button, displayed on the top right corner.

C01 Basic Data

Our reference
"Our reference" is used to uniquely identify a case (hand case as well as electronic case), and it is generally assigned automatically according to a custom-programmed algorithm when first saving the case. Alternatively, "Our Reference" can be entered manually.

Origin
The origin specifies if the present case is e.g. a national phase of PCT or of an EP validation.

Keyword, Title
In the "Title" field the official title can be entered, under which the property right is registered. In the practice keywords are often used as a short form of the title for faster understanding.

P.i.C.-1-, -2-, -3-, -4- (Person in charge)
A case can be assigned to – if necessary - up to four persons in charge. The identification code of the main responsible for the case should be entered into the field of the 1st person in charge.

Status of work

The status of work is automatically updated depending on the entered fields in field group "C15 - official data". For example, entering the application data will switch status of work to F (Filed) and additionally its date to the current date.

Status of case

The Status of case "." (Point/dot/period) indicates that a case is alive and in progress. Closing a case is accomplished by setting the status of case to "+" (closed).

C02 Persons

In the C02-field group all the case-related persons are stored. Their relationships to the case are saved by their functional codes (e.g. CL = Client, AP = Applicant, IN = Inventor, FA = Foreign Agent). If necessary, a 'Your Reference' for a person in this case can be entered.

Recipients of form letters are determined based on this field group. Double-clicking on the blue heading "C02 persons" in modification mode adds more empty rows.

Person i.d.

When you click on the info-corner of an empty Person i.d. field, a filter (persons query) is displayed for the search of a contact. After entering the search criteria (e.g. part of a word in the Keyword field) and opening the result (Enter key or List-button), the desired person-Id can be transferred into the case, either by using the "Field-Info" button or the key shortcut Shift + F4.

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