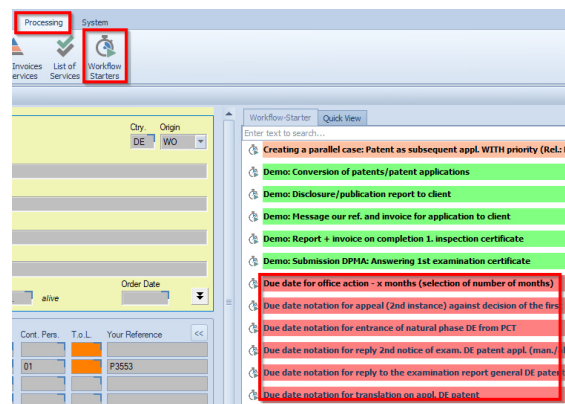


Quick start guide

Docketing of Due Dates via Workflow-Starter

1. Starting from a saved case select the menu item "Workflow Starters."



2. Depending on the configuration many different processing steps are offered in the Workflow Starter list. Some examples are docketing of due dates, and creating manual letters and invoices. Other examples are situation-specific workflows, depending on e.g. matter type, application country and status of case, with multiple partial steps (e.g. letter+invoice). Workflow Starter, relating to docketing of due dates, are marked in red. The execution of a Workflow Starter takes place by selecting the desired line and afterwards pressing the button „Process Workflow“.

3. When on the basis of a date field in the case, the computation of the due dates is done, then the determined due dates are displayed, and PatOrg continues with step 4.

Id	Description	Workflow-Id
Workflow-Starter-Id: 30 (Count=8)		
30BS-A	Due date notation: response to office action - 1 month	30BS
30BS-B	Due date notation: response to office action - 2 month	30BS
30BS-C	Due date notation: response to office action - 3 month	30BS
30BS-D	Due date notation: response to office action - 4 month	30BS
30BS-E	Due date for office action - x months (selection of number of months)	30BS
30XX-A	Due date notation: manual deadline	30XX
30XX-B	Due date notation: Manual deadline with prior notice	30XX
30XX-C	Due date notation for manual follow-ups	30XX
Workflow-Starter-Id: DE (Count=22)		
DEPTA01-A	Due date notation for application DE patent	DEPTA01
DEPTA01-B	Due date notation for entrance of natural phase DE from PCT	DEPTA01
DEPTA01-C	Due date notation for translation on appl. DE patent	DEPTA01
DEPTA01-E	Due date notation for reply first notice of exam. DE patent appl. (man./Job C 16-Da)	DEPTA01
DEPTA01-F	Due date notation for reply 2nd notice of exam. DE patent appl. (man./Job C 16-Da)	DEPTA01
DEPTA01-G	Due date notation for reply to the examination report general DE patent appl. (fro...	DEPTA01
DEPTA01-H	Due date notation for answ. the exam. cert. general DE patent application (from ...	DEPTA01
DEPTA01-I	Due date notation on arrival of grant decision DE-Patent	DEPTA01

If however PatOrg requires more information from the user to compute the due dates, then an appropriate dialog screen is displayed next. This situation is illustrated by the example of the workflow starter 30XX-A for "Docketing of Due Dates: manually":

In the screen shown, the "Manual date" (manual due date) needs to be entered. When you click on the info-corner, a calendar appears, from which a selected date can be applied. Furthermore, the abbreviations D for Day, W for Week, M for month and Y for year are available to enter relative dates, such as "D+4W" = "Today's date + 4 weeks". By means of the button "Verify Data", the validity of the date input is checked and displayed next to the field "Manual date". The docketing of the due dates is continued by clicking the "Proceed" button.

4. A screen displays the computed due date(s). The computed dates are shown in the the lower section "04 Due Date Data". All due dates, which have in the Vb field the value Yes (Y), are saved when clicking the button „Save Due Dates“.

5. The displayed message for the successful docketing needs to be confirmed with the "OK" button.

After saving these due dates, they can be opened by the user in several ways. Starting from a case, the due date can be listed by clicking on the button "Due Dates Terms".

The screenshot shows a software interface with a menu bar at the top containing 'Start', 'Subordinate Data', and 'System'. Below the menu bar are several icons: a back arrow, a close button, a field info icon, a go to icon, a compute due dates icon, a save due dates icon, and a calendar icon. The main content area is divided into several sections:

- 01 Recorded Data:** Includes fields for 'Our Reference' (A10002), 'Applicant' (Carl Freudenberg KG), 'REI' (102 19 966.3), and 'Due Date Rule' (14LM).
- 02 Manual Data:** Includes 'Fristdatum' (13/05/2020), 'DD-T' (FRI), and 'Reason / Action' (ALLG misc).
- 03 Referring Data:** Includes 'Key Word' (Ozoffhemstetel), 'Official N.' (102 19 966.3), and 'Person M.' (80032).
- 04 Due Date Data:** A table with columns 'No.', 'Due Dates', 'Person in Charge', 'DD-Type', 'Cause / Action', and 'Bc'. The table contains one entry: '1', '13/05/2020', 'FRI', 'ALLG misc', and a checked 'Bc' box.

At the bottom of the '04 Due Date Data' section, there is a 'Description' field with the text '(Hier nähere Beschreibung des Anlasses der Fristsetzung eingeben)'.

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