

# PatOrg 6

Brüggmann

## Quick start guide

### PatOrg Portal - First steps

PatOrg Portal facilitates to access data managed in PatOrg IP Management over the web. Amount of data to be published via PatOrg Portal can be flexibly defined as well as its design so that PatOrg Portal integrates seamlessly with any website.

This manual is based on PatOrg's sample configuration M02 and standard layout. Moreover, insight is not restricted by means of PatOrg Portal's rights management. This is in order to show the capabilities of PatOrg Portal. So, data that is provided finally for external parties via PatOrg Portal differs most likely in terms of nature and extent.

### Navigation

The navigation is similar to that in the PatOrg main program. On the left side you will find the general navigation menu, which is displayed at any time. From there you can access the filter masks (see filtering) of the individual data management. From there you get into the corresponding results list (see listing) and from there into the individual files. You can switch to the previous program areas at any time using the menu items above.

### Search

If you select any menu item, you will always switch to the view of the filtering of the respective data.

Muster Web Portal / Aktien / Filter

Filter Standardfilter Aktien

Eingabefelder ändern

Unbestimmtes Zeichen

Unser Zeichen (ungeau) --

Vorgangsort --

Anmeldeland --

Herkunft / Ursprung

Aktienstatus --

Sachstatus --

Stichwort/Titel

Kurzname

Person in Funktion --

Bearbeiter --

AmtAz-Datum -- tt.mm.jjjj - 13.05.2020

CheckBox-Datum (C16) -- tt.mm.jjjj - 13.05.2020

Keine Angabe

Initially, PatOrg Portal selects the first filter set and thus presents its input fields. A filter set consists of a number of filters. Each filter has a label on the left and one or more input fields for search criteria on the right. Most of all filters refer to a special data field and facilitate to search for records holding data matching the search criteria. However, PatOrg also offers filters related to a group of fields, so that multiple, related fields can be easily searched. A filter of this kind is “patent number” for example, that offers to jointly search in all fields containing official patent ids (e.g. application number, publication number, ...). Moreover, there is a special kind of filter to search for dates. These filters always consist of two input fields in order to define a time span. A date can be either stated explicitly or relatively by means of the following place holders:

- D = Day
- W = Week
- M = Month
- Q = Quarter
- Y = Year

This functionality furthermore provides to calculate dates, as the following examples show:

| Start-Date | End-Date | Description                                |
|------------|----------|--|
| D-20D      | D        | last twenty days                           |
| D-1D       | D+1D     | from yesterday until tomorrow              |
| W          | W+1W-1D  | from first day to last day of current week |
| M+1M       | M+2M-1D  | from first day to last day of next month   |
| Y-1Y       | Y-1D     | time of last year                          |

Next to some filter input fields an arrow symbol appears when the field has cursor or the mouse pointer is located in the field area. Input fields featured with this functionality refer to data fields holding identifiers as e.g. country codes, matter types, etc. On click on the arrow symbol PatOrg Portal presents all known identifies including descriptions. By selecting a line, the respective id is taken and put in the filter field. Alternatively, ids can also be entered manually. If an input field refers to a date, PatOrg Portal shows a dialog for selecting a date conveniently by means of a calendar dialog. Input fields without selection support function are associated with data fields holding free textual information.

The screenshot shows a filter selection dialog with the following items:

- Sachstatus**: ...
- Stichwort/Titel**: eingereicht (E), **eingetragen** (R), erteilt (G)
- Kurzname**: Freigabe (FG)
- Person in Funktion**: in Bearbeitung (IB)
- Bearbeiter**: nicht angemeldet (NA)
- AmtAz-Datum**: ... tt.mm.jjjj - 13.05.2020

By means of the placeholder '%' arbitrary text strings can be matched. Basically, PatOrg provides various filters for each data management. For PatOrg Portal filter sets can be predefined. So, list of available filter sets depends on configuration. PatOrg Portal offers users to modify filter set composition on demand but this functionality must be configured. Search criteria are finally built of all filters holding values. In this respect, filters are always logically combined by AND. So, records match search criteria if they fully comply with search criteria. On click on search button, search is initiated. In response, PatOrg Portal switches to the next tab presenting the results as a list.

## Result list

The result list shows all records matching the search criteria. Each line represents a single record and each column refers mostly to a single data field. For comprehensive data managements as first of all case management, the result list comprises only some but not all data fields. The columns and their ordering are defined by configuration. Basically, multiple, alternative list layouts can be designed and offered for selection. However, this functionality is deactivated in sample configuration.

Dependent on configuration, cells or lines might be colored according to certain rules. For example, PatOrg provides to grey out all lines representing cases which are closed. Each column has a label on its top. By clicking a label the values in the respective column can be sorted ascending (first click) or descending (second click). By means of drag&drop PatOrg Portal provides to reorder columns. Moreover, columns can be resized as usual. However, such modifications are not saved and thus get lost when another search is done.

Additionally, the list offers serveral functions which can be initiated using buttons located above the list. The number of records resulting from a query might be big. In order to respond quickly to a search query, the PatOrg Portal initially returns only a limited number of records as long as the total number exceeds a certain value. For this purpose, a navigation is available at the bottom of the screen to browse through the results list.

On click on the filter button, PatOrg Portal shows a selection bar beneath the column labels. It provides to filter search results. The filter bar features each column with a input field along with a filter button. If a text string is entered, PatOrg Portal only shows records containing the entered text string in the respective data field (column). However, user input can also be interpreted differently. On click on the filter symbol attached to the input field PatOrg Portal shows a number of alternative search options as e.g. "does not contain".

Data included in a list can be exported to files in Word, Excel, PDF, Text, HTML or plain text format. To do this easily, PatOrg Portal offers the export button. In which file format the function exports the list, can be configured in the options. If a row of the list representing a record is clicked, the view switches and all record data is displayed that is made available for the PatOrg Portal.

## Record Views

The record view shows all data of a record a user is allowed to see. The label of a data field is grey colored and always arranged above the field content. A record consists of a certain amount of data fields, organized into field groups, which can be considered as "data blocks". A field group contains fields which are in close semantic relation to each other as e.g. person data, bibliographic data, etc.

Akte: A10002 +

|                                     |            |                                      |   |
|-------------------------------------|------------|--------------------------------------|---|
| Vorgangsart<br>Patent               | Land<br>DE | Herkunft<br>WO                       | Patent-Register<br>• German Patent and Trade<br>Mark Office |
| Stichwort<br>Ozonfiltermaterial     |            |                                      |   |
| Titel<br>Ozonfiltermaterial         |            |                                      |   |
| Titel deutsch<br>Ozonfiltermaterial |            |                                      |   |
| Bearbeiter<br>#1: JB                |            |                                      |   |
| Sachstatus<br>17.09.2018 angemeldet |            | Aktenstatus<br>(Leer) in Bearbeitung |   |

### Personen

|                            |
|----------------------------|
| > Carl Freudenberg KG (AN) |
| > Carl Freudenberg KG (AG) |
| > Reinhardt, Heinz (ER)    |
| > Borris, Richard (ER)     |
| > Klausnitzer, Bernd (ER)  |

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