

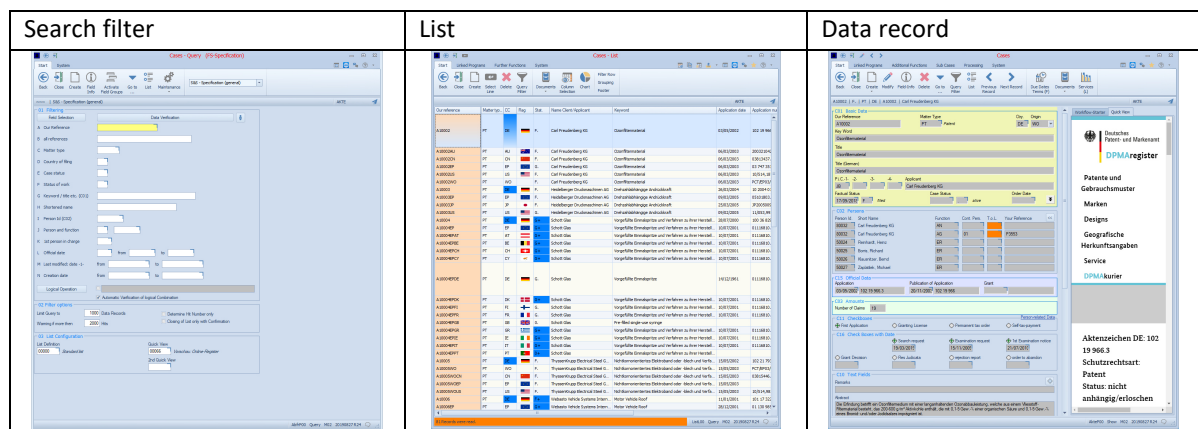
## Quick start guide

### Principles of the PatOrg Software

#### 1. 3-levels-principle of data management

Data is stored in so-called data managements in PatOrg system, e.g. case management, person management, due date management, document management, and many more, some even smaller sub-managements, such as the general country data.

The display of an individual record of a data management is carried out via 3 levels:



#### Level 1: Search filter

After starting a data management (for example from the main menu) a search filter of the selected data management will be displayed. In PatOrg search filters are designed uniformly. The criteria listed are fitted to the data fields of the selected data management. At the top left of the program heading can be seen in which data management one is (case search, person search, etc.). After entering search criteria (optional) level 2 will be displayed via the "List" button or alternatively via the Enter key. If no search criteria are entered, all records of the data management are listed.

#### Level 2: List of data records

A list of records corresponding to the search criteria you entered is displayed. If necessary, on the funnel button or the F8 function key, the search filter (level 1) to the current data management can be called (again) and the search can be repeated as described above. The selection and arrangement of the columns displayed in the list is customizable. In addition, at the top right corner of the toolbar there are buttons displayed to export

the result list and print it out. A single record is opened and displayed in full screen by double-clicking or highlighting a line and pressing the Enter key (key or button).

### Level 3: Data record view

The selected record is displayed in full. For large data sets only part of the data is visible. The area which is not displayed can be displayed on the screen via the scroll bar at the right side or by using the arrow keys.

The purpose why the record is opened, can now be performed (eg access or modification of data). Via the Back button or the Escape key the user switches back to the next higher level, here return to list of records. Starting from the data record view the F8 key or the funnel button will open the search filter for the current data management (level 1).

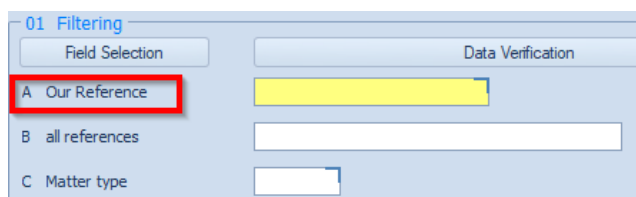
*For more information about modification and combination of criteria for expert search and column configuration of lists see the Quick Start Guide for "Search filter and lists of records" and the documentation text for search filters.*

## **2. The double-click principle / inserting and deleting rows of data**

The double-click principle is used while searching data and processing of data record of data managements. (especially cases and persons).

### Use in Search filters

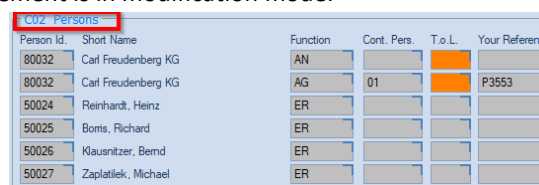
A double click with the left mouse button on a filter criterion ensures that this criterion is doubled in the filter. A criterion can be removed from the search filter via clicking with the right mouse button on the name of the criterion.



### Use in Main data managements, e.g. case management

If there not enough fields in a field group, new fields can be added by double clicking on the appropriate field group heading. This requires that the respective data management is in modification mode.

Unlike in a search filter new lines are not removed by a click with the right mouse button. The removal of empty fields in a field group will be done automatically after the record is saved or closed without changes.



Person Id.	Short Name	Function	Cont. Pers.	T.o.L.	Your Reference
80032	Carl Freudenberg KG	AN			
80032	Carl Freudenberg KG	AG	01		P3553
50024	Reinhardt, Heinz	ER			
50025	Bornis, Richard	ER			
50026	Klausnitzer, Bernd	ER			
50027	Zaplatiek, Michael	ER			

## **3. The Info-Corner**

The various data managements of PatOrg are linked. For example, the associated persons of a case are (e.g. applicant) saved in the field group C02. Case records use many other data managements, such as the person management to link applicant, client, inventor, local agents and others. Fields linked to other data managements have a blue-yellow corner on the right.

Depending whether the data field contains data or not the field info corner will open different windows. For an unfilled data field, which is associated with a main data management, PatOrg will display the search filter of the respective data management. The filter can be used as described for the principle "3 levels of data

management". However, clicking the info-corner on a non-filled data field, which is associated with an auxiliary data management (such as the location data management), will open a window with all available values. Here in this case, no record is selected. When clicking the info corner for a filled data field the search word principle will apply.

#### **4. The search word principle**

The search word principle states that the value entered in a data field is used to filter the values which are shown in the following window. When pressing the info-corner on a data field, which is linked to a main data management, PatOrg will open a list with records containing the entered value. The first value in the list is highlighted. When pressing the info-corner on a data field, which is linked with an auxiliary data management, PatOrg will open a window containing all the values. The first record containing entered the value is highlighted.

#### **5. The field takeover principle**

The field takeover principle allows to transfer a selected value from a data management to another data management. This principle is applied in connection with the search word and field info principle. If a record is identified as described in the above procedure and the current data management is in modification mode, the button is displayed. By clicking this button, the selected value is taken over to the field from which the field info was started.

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