

# Changes Version 22.3.0

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FTO

News

3)

### Folder Monitoring

With the new feature Folder Monitoring, every user can now create tasks to monitor relevant folders for new patents. Administration permissions are not required. Similar to Monitoring Tasks, one or more folders can be monitored. Creating your own folder monitoring works as follows:

1) Switch to the "Folder Monitorings" area on the left-hand side



2) Create a new monitoring with the + symbol:

Tasks		Order by Priority  Filter
<b>Q</b> Research projects		
_		
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in the corresponding	fields like	
a. Select the releva	int tolders	
b. enter a name an	d	
<ul><li>b. enter a name an</li><li>c. save with the tic</li></ul>	•	
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C. save with the tic	ions • Management • © New Folder View	Simple O Advanced      Folder tree      Search Folder name      P7-Demo     Add new Monitoring Task name      Add new Monitoring Task name
C. save with the tic	k. ions Management View View Folder Select	Simple O Advanced      Simple O Advanced      Folder tree      Search Folder name      P7-Demo     P2-Demo     Patent Department
C. save with the tic Prechnologies Dashboard Observati Tasks Q. Research projects Polder Monitorings Q. # Patent number search Q. % Implified search Q. § Simplified search	k. ions • Management • <b>Q New Folder</b> View Folder Select. Name	Simple O Advanced      Search Folder tree      Search Folder name      Protect partment     Monitoring Task name      Add new Monitoring Task name     Add new Monitorin

4) Then you obtain a new task that initially displays all the patents in the folder and expands dynamically as new patents are added. Among the advanced options, a highlighting scheme can also be added, the priority can be changed or the base can be changed.



PTechnologies Dashboard Observations - Management -📋 Tasks Order by Priority 🔻 1 Filter task name **Q** Research projects Monitorings 🗁 🖵 Folder Monitorings **Q #** Patent number search My First folder monitoring (active) Priority: Low Q ≡ Intelligent search New 174 pat **Q Q** Simplified search Not relevant 📂 Folder tree Finished 0 p This is the description

The Folder Monitorings are also displayed within the Tasks menu.

The symbol in front of the task title indicates whether it is a self-created "Folder Monitoring" a Monitoring Task

Note: If there are already many patents in the folders to be monitored and only newly added ones should be monitored, the patents in the "Folder Monitoring" must initially be set to finished. To do this, please proceed as follows:

Open the "Folder Monitoring" and display the new patents (click on the number of new patents):

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📋 Tasks	Order by Priority - Filter task name	4
🖹 🔍 Research projects		
声 🖵 Folder Monitorings	Monitorings	
<ul> <li>Q # Patent number search</li> <li>Q ≡ Intelligent search</li> <li>Q ♀ Simplified search</li> <li>➢ Folder tree</li> </ul>	My First folder monitoring (active)          New       174 patents         Not relevant       0 patents         Finished       0 patents         This is the description	Priority: Low

Now mark all patents as "finished":

PTechnologies Dashboard Observa	tions • Management •
► T 33 🖹 - 🕤	
Reset status	(06/12/2017, 06/06/2019, 06/12/2037
Modulare Heiz	Selection
	ition
	♦ All entries without status stem

Now you will only be notified when new patents are added to the monitored folders.



## Create/manage search projects

This feature can be enabled for your network upon request.

For extensive searches, you can now create and manage your own search projects in the web application. The search basis can be changed, a highlighting scheme can be assigned, etc.

To create a new search project, proceed as follows:

1) Switch to the "Research projects" area and press the + symbol.



#### 2) Enter a name and set the desired settings.

Name						
Name		F	ilter:	Filter		₫
Description			Username	E-mail	Readonly	
			demo1	Karl@ip7.tech		
	First publication		demo10	demo10@spaniship.com		
Preferred document	○ Granted		demo11	demo11@spaniship.com		
Highlighting Scheme	None -		demo12	demo12@spaniship.com		
	O Individual		demo13	demo13@spaniship.com		
Status	Apply all users		demo15	demo15@spaniship.com		
			demo16	demo16@spaniship.com		
			demo17	demo17@spaniship.com		
			demo18	demo18@spaniship.com		

3) After pressing the check button, you have created the search project. It is immediately marked as the active search project. As soon as you perform an "Intelligent search" or a simplified search, the evaluations and comments are saved in this search project.

Note: You can see the active search project in the simplified search or the intelligent search on the right-hand side. In the results lists or the detailed view, it is displayed at the top centre.



## Share search projects

Owned research projects can be shared with other users. Read or write permissions can be set up. Sharing of the search projects can be carried out both when creating or later with the help of the project settings.

You can access the project settings in the menu "Research projects" with the pencil symbol:

P7echnologies Dashboard	Observations  Management		
asks	Recent projects Order: most recently used, first.	Filter project name	
🖹 Q. Research projects			
► 🖵 Folder Monitorings	Searching for Diodes		
<b>Q</b> # Patent number search	Not relevant 291 patents		
Q ≡ Intelligent search	Finished 580 patents		
<b>Q Q</b> Simplified search	Ein Test		

On the right side, a list of users to whom you can make your research project available is displayed.

With the option "Read only" the project can be released with read permissions. The selected user can therefore not create or edit evaluations, project comments or patent status (finished, not relevant) within this project.

If the "Read only" option is not selected, the selected user has write permissions and can create evaluations, project comments and patent statuses.

The Status option on the left specifies whether the patent status (finished, not relevant) should apply for all users who have access to the search project or whether the status applies individually to each user.

Name	Searching for Diodes	Fil	ter:	Filter	ć
Description	Ein Test		Username	E-mail	Readonly
Jeschption	1		demo1	Karl@ip7.tech	
Preferred document	O First publication		demo10	demo 10@spaniship.com	
	Granted		demo11	demo11@spaniship.com	
Highlighting Scheme	Second Highlighting 🗸		demo12	demo12@spaniship.com	
	O Individual		demo13	demo13@spaniship.com	
itatus	Apply all users		demo15	demo 15@spaniship.com	
			demo16	demo 16@spaniship.com	
			demo17	demo 17@spaniship.com	

 $\checkmark$   $\times$ 



## Administration: Monitoring Task – hide "not relevant" button

By default, all monitoring tasks display the "not relevant" button (thumbs down). Now administrators can hide the "not relevant" button via a new option. In combination with the option "Force evaluation to set finished status", an evaluation can be made unavoidable.

P7echnologies Edit Monitoring Task > Name 4) Patent Coordinator 1 - Granted Force evaluation to set finished status • Yes O No "Not Relevant" button ○ Hide Show Description Group Coordinator 1 Ħ Tags (select/unselect) ○ Document Berlin Munich Application Base O Strict Family Research & Development O Extended family Legal Status filter 🕕 Doc Type Granted
 Granted
 First publication Dead O Individual Granted Patent status Published Apply for all users of Monitoring Task Utility model Ignore D docs Yes O No Country filter 🚯 Priority ○ Low ○ Medium ● High ↓ Q Search Search by country code Send Mail Yes O No Daily O Weekly O Monthly Mail Interval

The option is set to "Show" by default for all previous monitoring tasks.

Monitoring Task E-Mails

Weekly e-mail notifications can be set for monitoring tasks.

Up to now, it was checked if 7 days have passed since the last e-mail and if there are new patents in the monitoring. Then an e-mail was sent again.

Now the mails are sent according to a new logic per calendar week.

Friday/Saturday/Sunday weekly email notifications are generally no longer sent.

This means that in many cases the email will reach the users on Monday.

Especially if new patents are assigned to folders exclusively by auto. search.



## Improvements

Redesign of the results list: The menu items as well as the arrangements in the results list have been revised. As a result, fewer buttons appear and the application can be operated more efficiently.

- Redesign of the detail view:
   The detail view has been optimised. The menu items have also been revised and the view optimised.
- Display of the simplified legal status for the family in the result list and the detailed view.
   In the result list, the simplified legal status (published, granted, dead) is displayed after the patent number. If the legal status of the document does not correspond to that of the patent family, a note in the form of an exclamation mark appears behind the legal status. By clicking on the legal status, the legal statuses of the simple and extended patent family can be displayed.



- The display of the base, the pages and the sorting of the result list is now shown at the bottom and always remains visible.



- In the detailed view, the position of the patent in the current result list is now shown at the bottom.

#1 of 174 (Applications)