

Changes Version 22.3.0

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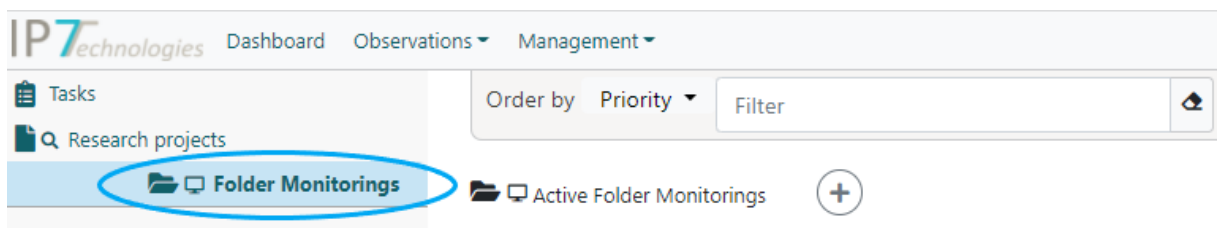
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News

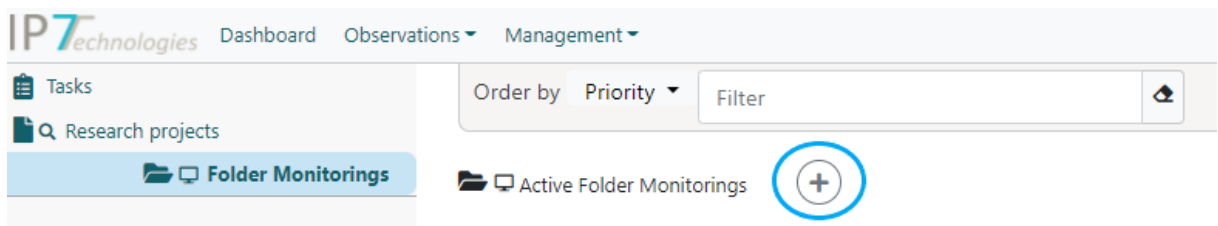
Folder Monitoring

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:

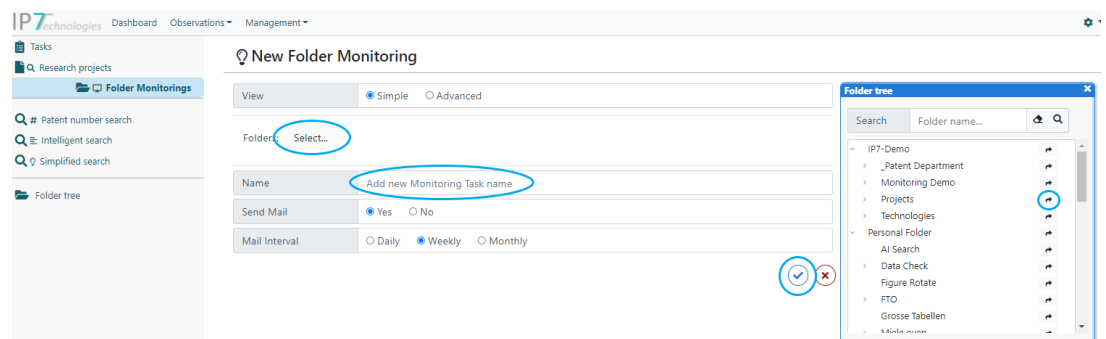
- 1) Switch to the "Folder Monitorings" area on the left-hand side



- 2) Create a new monitoring with the + symbol:

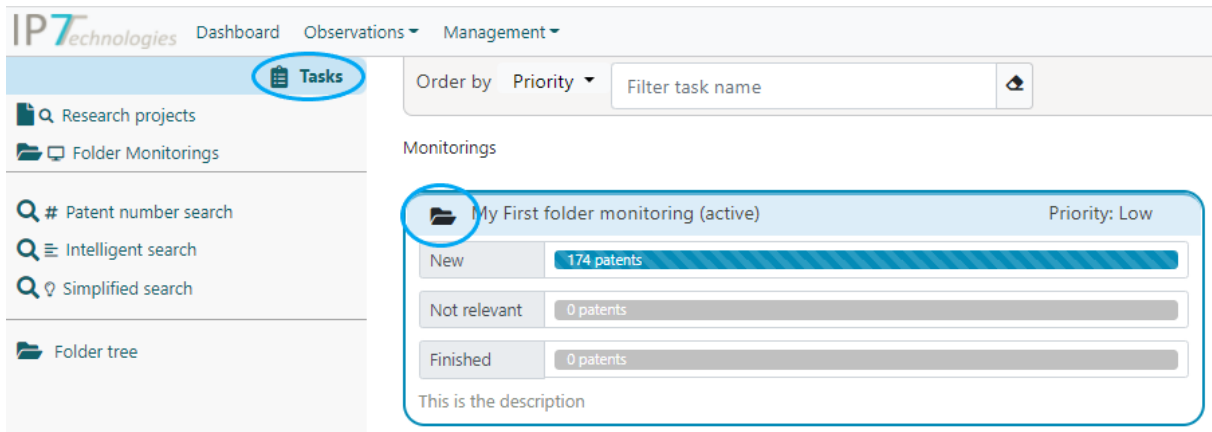




- 3) Fill in the corresponding fields like:
 - a. Select the relevant folders
 - b. enter a name and
 - c. save with the tick.



- 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.

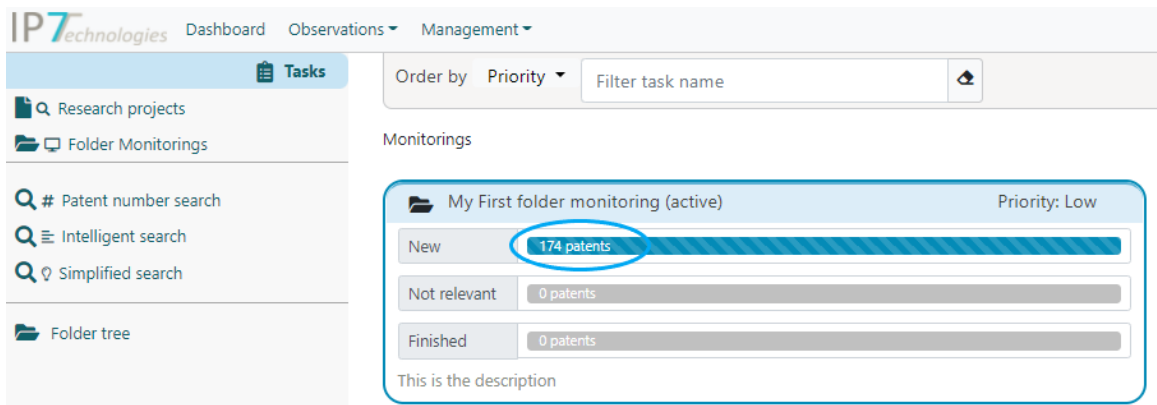
The Folder Monitorings are also displayed within the Tasks menu.



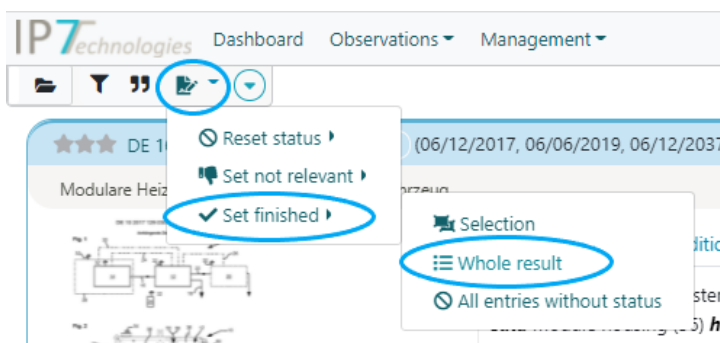
The symbol in front of the task title indicates whether it is a self-created "Folder Monitoring"  or a Monitoring Task .

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):



Now mark all patents as "finished":



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

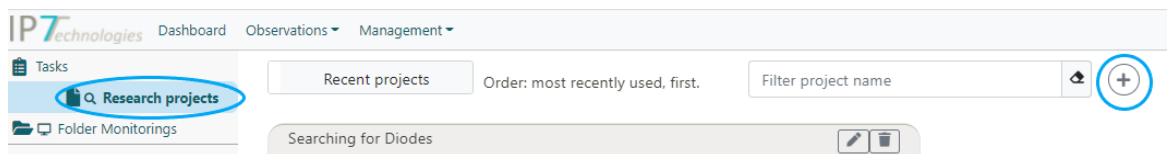
Create/manage search projects

This feature can be enabled for your network upon request.

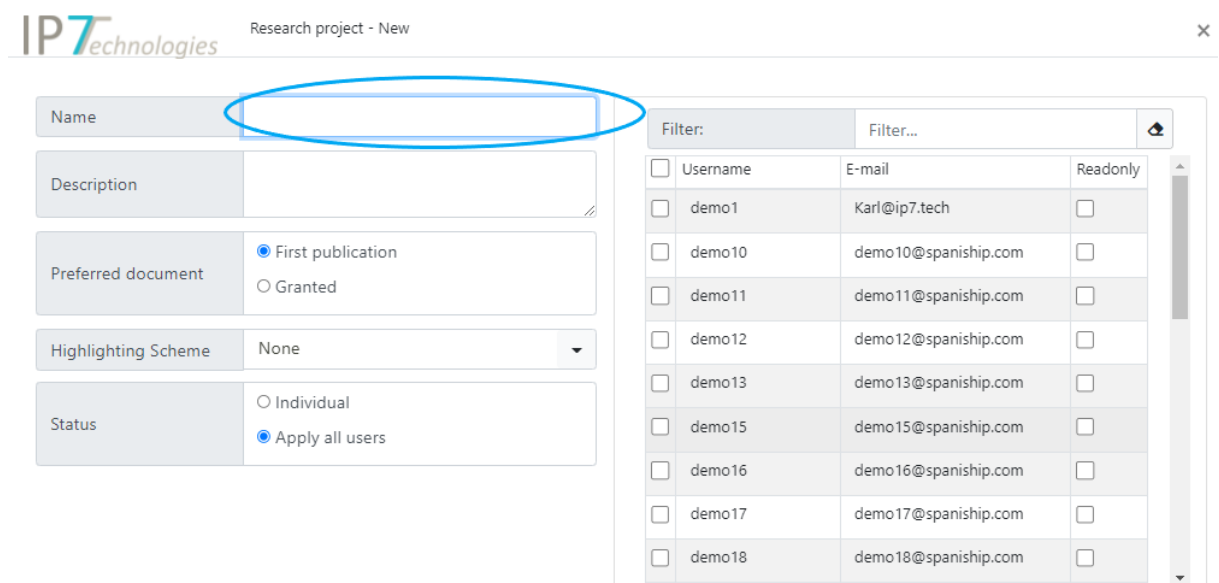
For extensive searches, you can now create and manage your own search projects in the web application. The search basis can be changed, a highlighting scheme can be assigned, etc.

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.



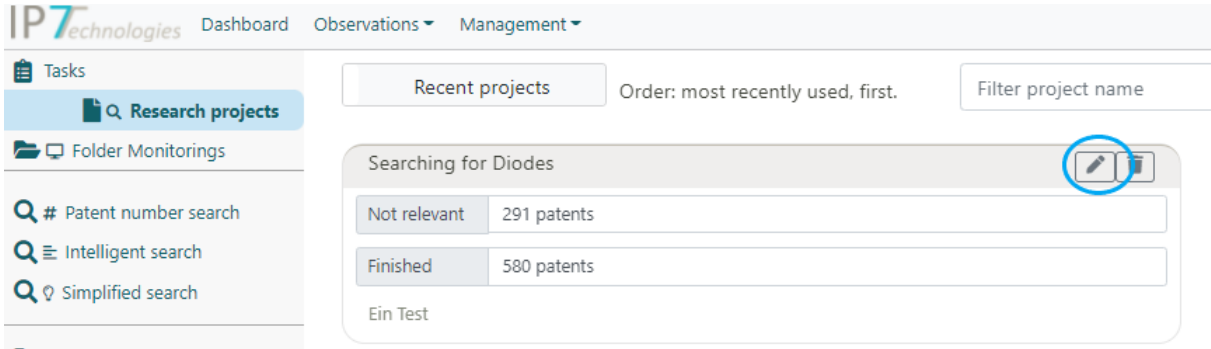
- 3) After pressing the check button, you have created the search project. It is immediately marked as the active search project. As soon as you perform an "Intelligent search" or a simplified search, the evaluations and comments are saved in this search project.

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:

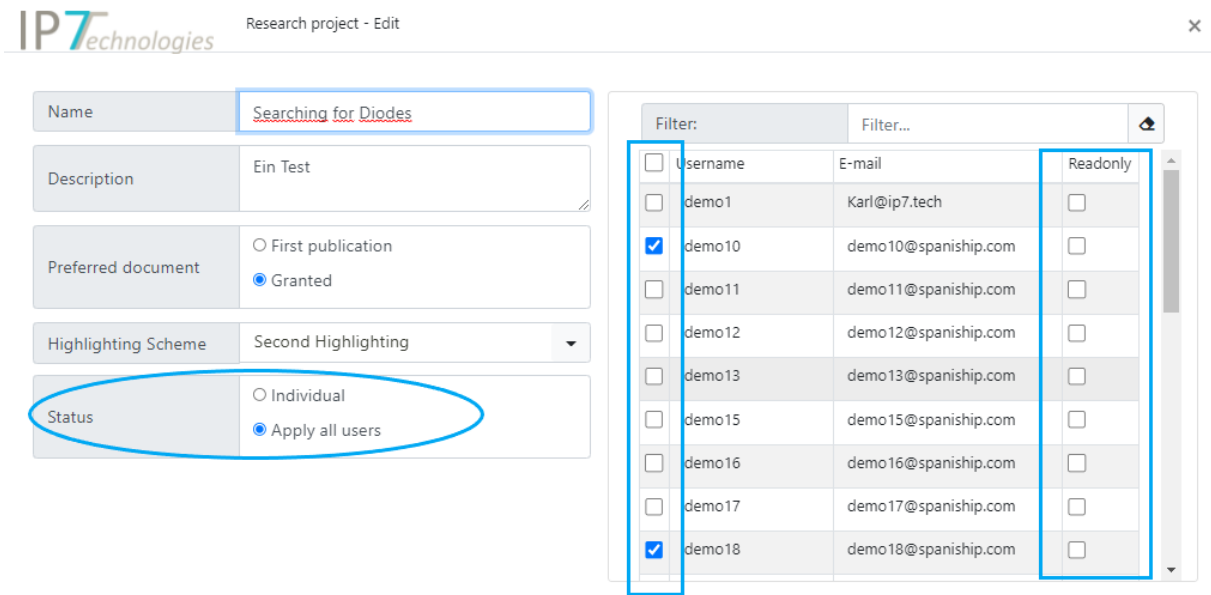


On the right side, a list of users to whom you can make your research project available is displayed.

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.



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.

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

The screenshot shows the 'Edit Monitoring Task' interface. The 'Not Relevant' button option is highlighted with a blue circle, showing it is set to 'Show'. The interface includes various configuration options for monitoring tasks, such as Name, Description, Group, Base, Doc Type, Patent status, Ignore D docs, Priority, Send Mail, Mail Interval, Force evaluation to set finished status, Tags, Legal Status filter, and Country filter.

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

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.

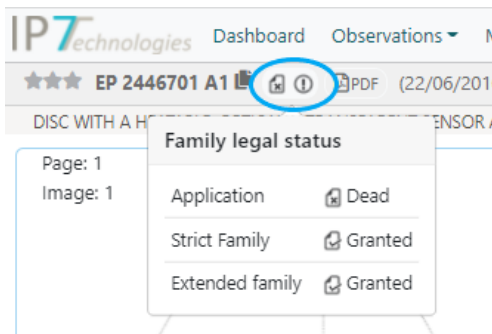
Friday/Saturday/Sunday weekly email notifications are generally no longer sent.

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.

