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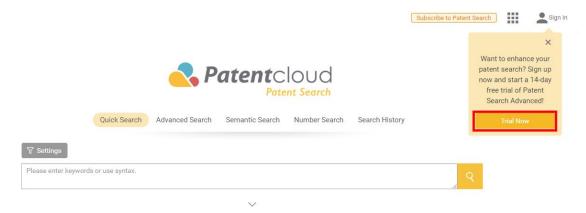
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## Registration&Subscription

## Account Registration/ Maintenance

Before you can start to use Patentcloud, you must first create and register for an account. Go to the Patentcloud platform, and click on the **Trial Now** button to start your account registration process.

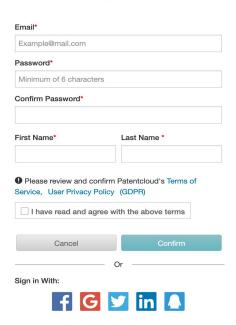


Fill out the form as seen below. Enter your:

- 1. Email address
- 2. Password
- 3. Reenter your password to confirm it
- 4. Your first and last name

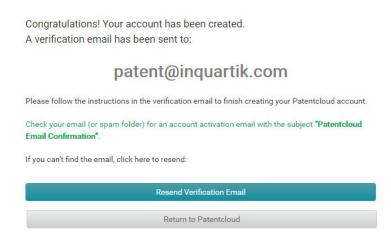
Then, click on **Confirm** to submit your registration. You can also register using social media platforms, such as Facebook, Google, Twitter, LinkedIn, and QQ.

## Sign Up



A verification email will then be sent to your email address. If you do not receive this email within 10 minutes, please click on the **Resend Verification Email** button to resend a verification email.

## Please Verify Your Account



If you do not receive the verification email, please check your Spam or Junk folder in your mailbox. Otherwise, go to the URL <a href="https://app.patentcloud.com/re-active.html">https://app.patentcloud.com/re-active.html</a>, enter the email address for your account, and a new verification letter will be sent to you.

Once you have received the verification email, click on **Activate My Account** to activate. Now you can sign in to Patentcloud with your registered email address.



After clicking on **Activate My Account**, you will see a new window with **Account Activation Successful**.

# **Account Activation Successful.**

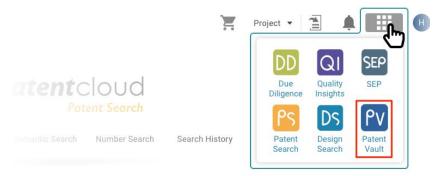
Your account has been activated.
You may now sign in and get started with Patentcloud!

Return to Patentcloud

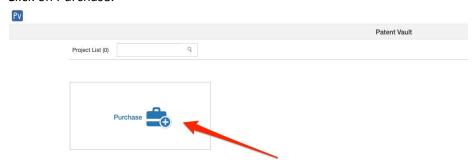
## **Patent Vault Subscription**

To subscribe to Patent Vault, please follow the steps below:

- 1. Sign in to your account.
- 2. Select Patent Vault from the Product Menu.



3. Click on Purchase.

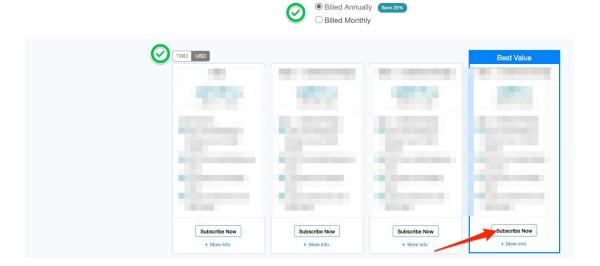


4. The pricing page will be displayed. Select the billing period that you wish to use - Annually or Monthly. Then, select your currency and choose the plan that you wish to purchase. Click on Subscribe Now to proceed.

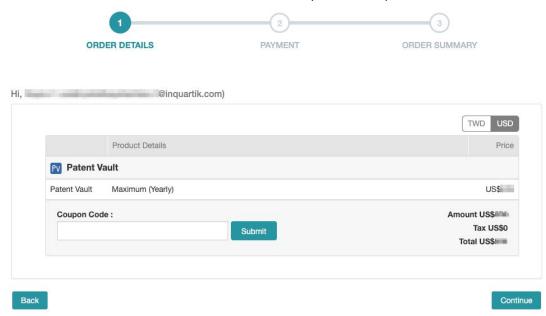


Patent Vault - Streamline Your Work with a Cost-Effective Workspace

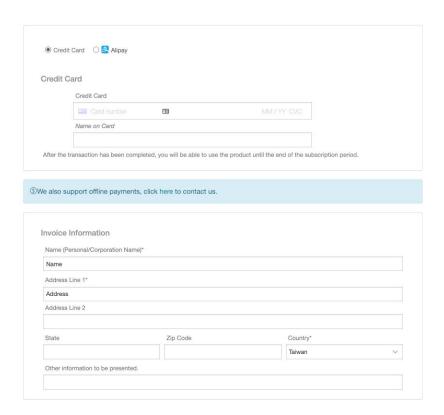
Patent Vault Enables Your Team to Become More Synchronized



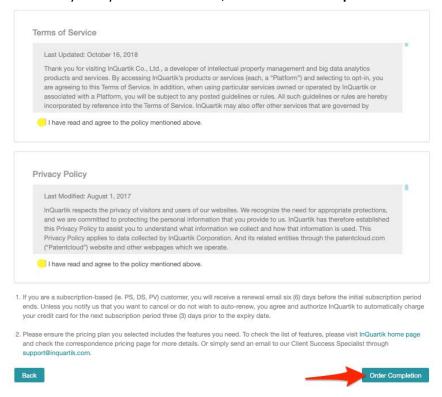
5. Review and confirm that the items listed are what you want to purchase. Click on **Continue**.



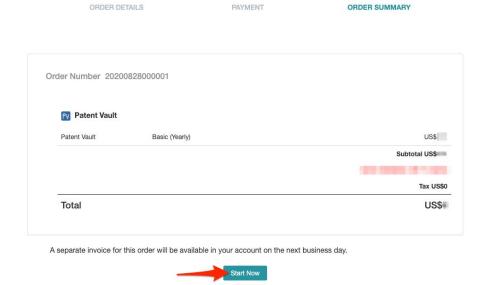
6. On the Payment page, please enter your credit card information and your invoice information.



7. Scroll down to the bottom of the Payment page. Read and tick the checkbox for the Terms of Service and Privacy Policy statements. Then, click on **Order Completion.** 



8. Congratulations! You now have a Patent Vault subscription. Click on Start Now to access your project.



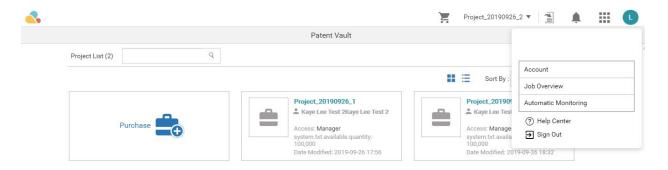
#### **Refunds and Returns**

Please note that there are no refunds for the Patent Vault subscriptions.

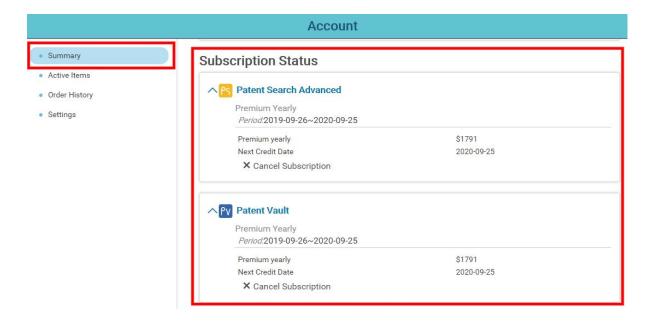
## **Purchase History**

Your purchase history can be viewed in the **Account** section of your account. Please follow the steps below to access your previously purchased items.

1. Click on the round icon on the upper right side, then click on **Account**.



2. On the left panel, click on Summary. You will see your **Subscription Status** information.

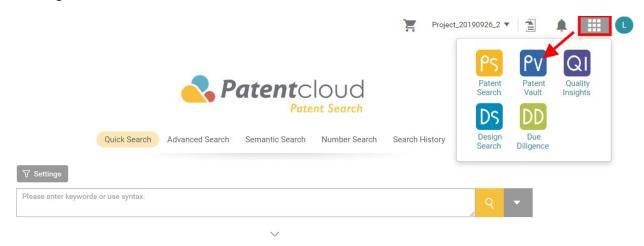


## What is a Project?

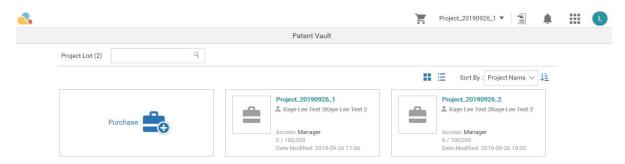
A project is essentially a user's patent database, which uses a tree-shaped structure for patent classification and organization. Purchasing Patent Search Premium entitles you to one (1) project in Patent Vault with a storage capacity of 100,000 patents. Similarly, you can subscribe to Patent Vault with four different plans that best-fit your needs for storage sizes.

## **Project List**

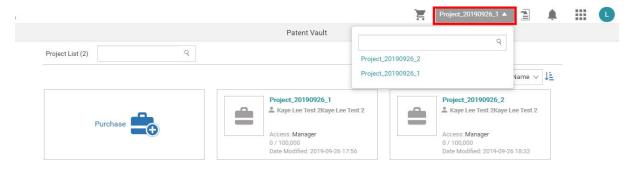
If you have multiple projects in your Patent Vault, you can access this by clicking on the grid icon and selecting Patent Vault.



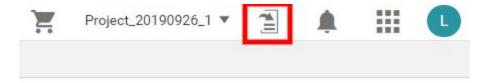
You can then choose from your Project List or purchase more projects on this webpage.



Another method is to click on the dropdown list beside the Shopping Cart icon found on the upper right side of the page to select the project you want to use.



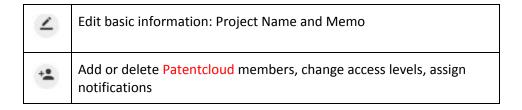
For those with only one project in their Patent Vault, you can click on the (1) icon found on the upper right side of the page to access it.



Once you are on the Project List page, you can see all of the projects currently available to you. Each box shows basic information including access level and members.

The project manager has the following project controls:





## **Collaboration Management**

NOTE: This feature requires Manager level Folder Access.

In the Project List view, choose the project that you want to use and click on the Member icon to open the Collaboration Management window.



In the Overview tab, the Member icon is in the upper right corner.



#### Add/Delete Members

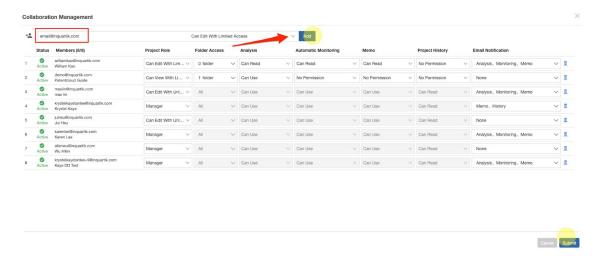
**Change Folder Access** 

**Change Feature Access** 

**Change Notification Setting** 

#### Add/Delete Members

To add a new member, enter a valid email address and initially set the Project Role. Then, click on Add.

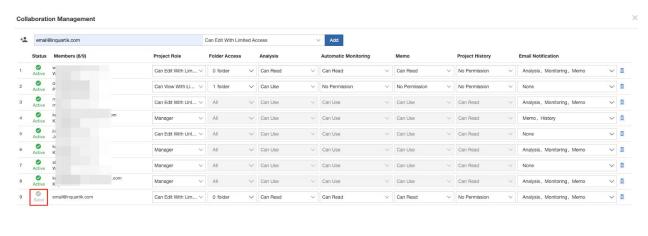


There are five options for Project Role:

Manager	can add/delete/edit members, role, access level, notification setting can add/delete/edit all folders and folder contents can use all features
Can Edit with Unlimited Access	can add/delete/edit all folders and folder contents feature access depends on what the Manager has set
Can Edit with Limited Access	can add/delete/edit assigned folders and folder contents feature access depends on what the Manager has set
Can View with Unlimited Access	can view all folders and folder contents feature access depends on what the Manager has set
Can View with Limited Access	can view assigned folders and folder contents feature access depends on what the Manager has set

Once done adding members, click on Submit.

The invitees will receive an email notification from InQuartik. When they click on the link in the email invite, the Status in Collaboration Management will change from "Send" to "Active".

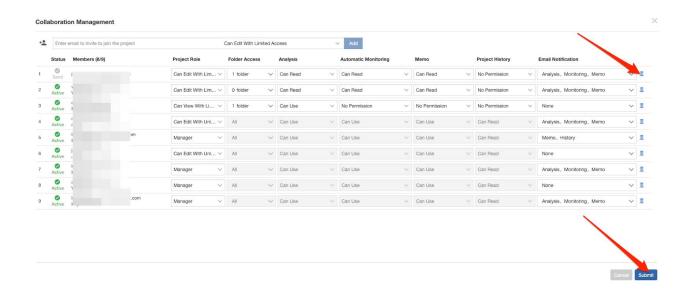


FAQ: Project invitee did not receive an email invitation

To delete a member, click on the Delete icon in Collaboration Management. A prompt to confirm will appear, click on Confirm. Then, click on Submit for this change to take effect.

Cancel Submit

The deleted member will not receive any email notification.



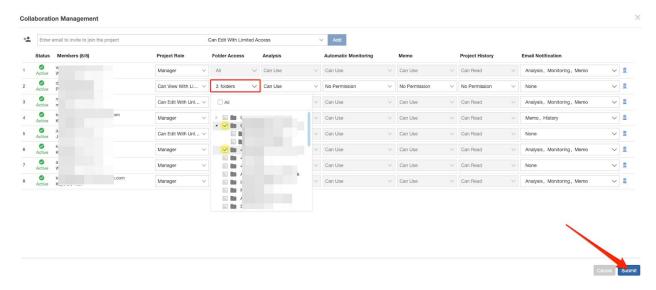
## Change Folder Access

Folder Access is dependent on Project Role.

For those with Manager, Can Edit with Unlimited Access, and Can View with Unlimited Access roles, all folders in the project are accessible. For those with Limited Access, the Manager must select which folders can be accessed.

To change folder access, the project Manager can go to Collaboration Management and click on the dropdown for Folder Access to select folders. Then, click on Submit.

Note: Selecting the folder does **not** automatically select the sub-folders.



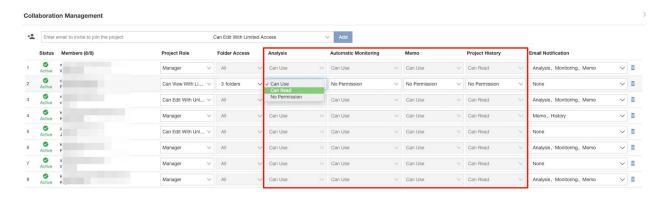
#### Change Feature Access

Feature Access is independent of Folder Access. This is a project-level setting.

There are 3 permission options:

Can Use not applicable for Project History	Unlimited access and can create
Can Read	View access and cannot create
No Permission	No access at all

To change feature access, the project Manager can go to Collaboration Management and click on the dropdown for each feature (Analysis, Automatic Monitoring, Memo, Project History). Then, click on Submit.





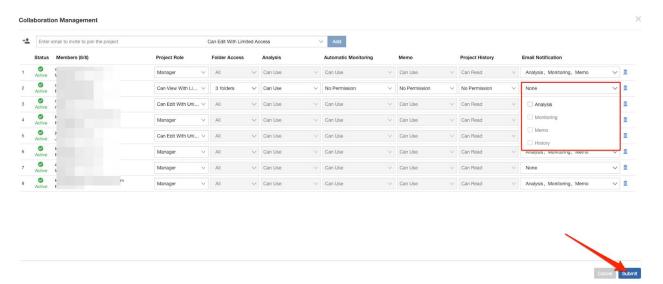
## **Change Notification Setting**

There are 4 types of email notification triggers: Analysis, Monitoring, Memo and History.

Every project member can change his/her own notification setting. The project Manager can set for all members and override individual members' settings.

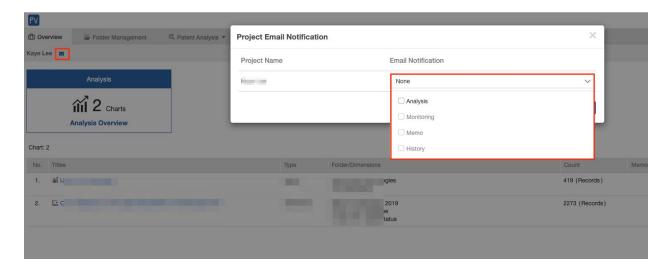
#### Manager view

Go to Collaboration Management and click on the dropdown for Email Notification. Then, click on Submit.



#### Member view

In the Overview tab, click on the mail icon <a> .</a> Select which notifications to enable then click on Submit.

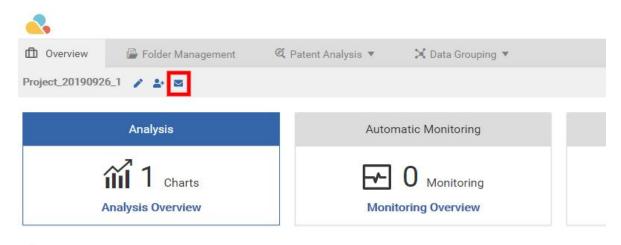


## **Overview Page**

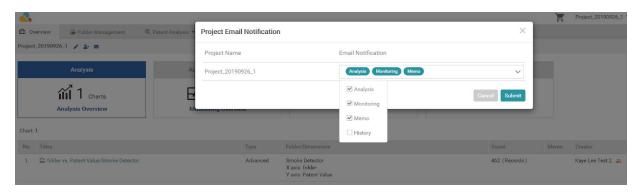
Select and click on any of your projects on the Project List to go to its Overview page. Once Patentcloud members, whether they are PS Basic, Advanced, or Premium members, have been invited, they can view, edit or manage (depending on the access level) the project contents including Analysis charts, Automatic Monitoring, Memos, and Project History. Non-PS subscribers can view only.



To stay updated on new changes, members can personalize their own Project Notification settings by clicking on the mail icon.



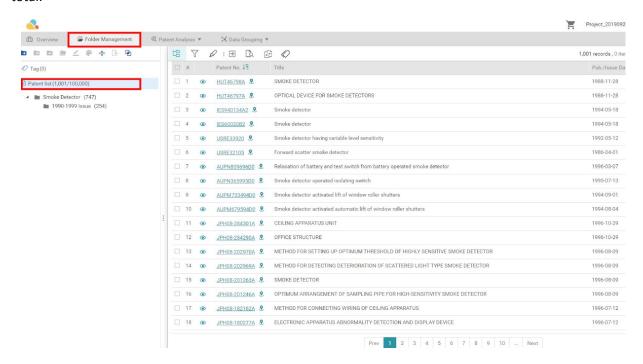
Select different Email Notification types from the drop-down list and tick or untick the checkboxes as needed. Then, click Submit.



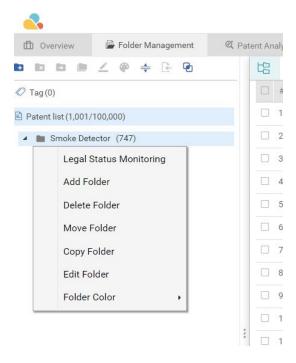
## Folder Management

Folder Management shows all your folders, its subfolders, and the corresponding patents.

The root folder ( ) is called **Patent list** and the number beside it shows the count of unique patents you have stored in your account against the capacity of your Patent Vault project. The same patent or publication number saved in multiple folders will only be recorded as one (1) unique patent in your total.

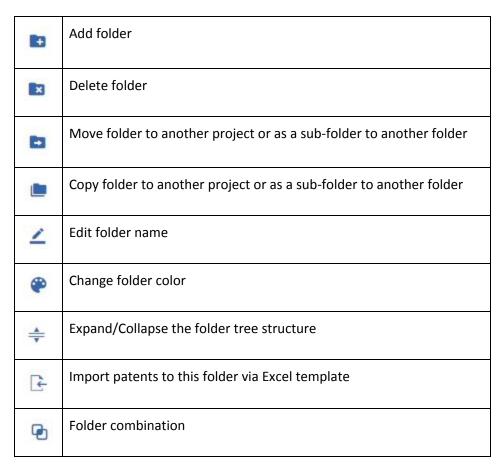


Select any folder under Patent list and right-click to see the commands as shown below.

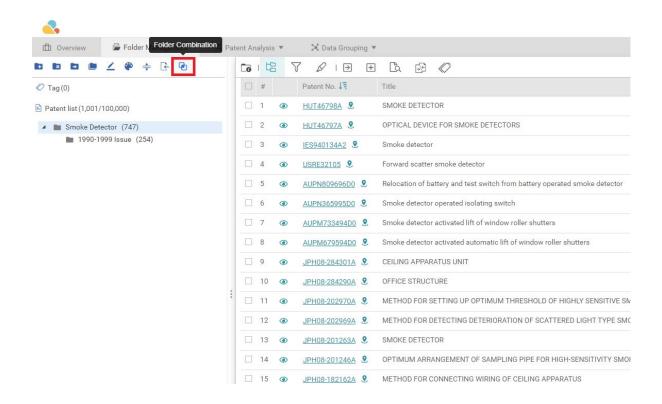


- 1. **Legal Status Monitoring:** This tracks the status changes of the patents in this folder.
- 2. **Add Folder**: This adds a subfolder from the folder name you have selected and right-clicked on. Click on the triangle arrow beside the selected folder to show the subfolder you have added.
- 3. **Delete Folder**: This deletes the selected folder. Click on Confirm to execute.
- 4. **Move Folder**: This moves the folder and its contents to another folder. Click on Confirm to execute.
- 5. **Copy Folder**: This copies the selected folder to another folder.
- 6. Edit Folder: This renames the selected folder. Press Enter on your keyboard to execute.
- 7. **Folder Color**: This applies a color to your folder icons to quickly distinguish them. This is limited to four (4) choices.

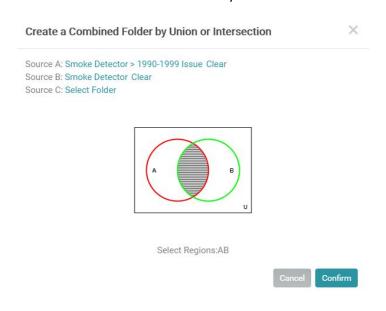
Select any folder under your Patent list and access these different Folder Management functionalities as shortcuts.



If you click the **Folder Combination** button, you can create a combined folder either by union or intersection.



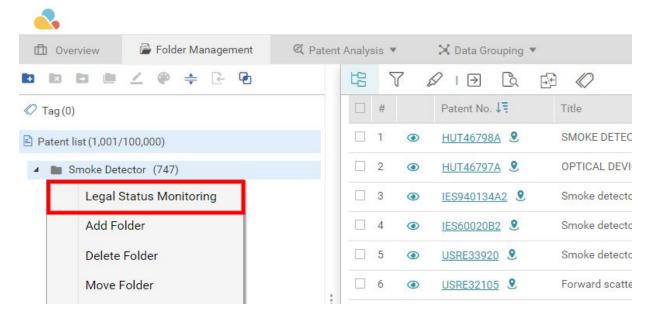
You can select 2 or 3 folders to create a combined folder by union or intersection.



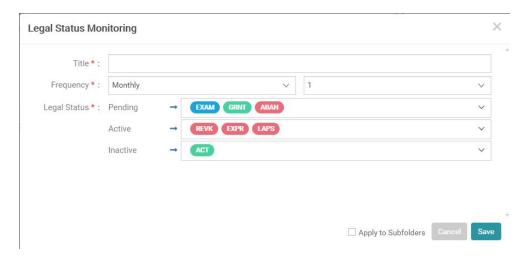
## **Legal Status Monitoring**

As legal status is essential to your search, use Legal Status Monitoring to track the status changes of your selected patents. For Premium users and Patent Vault subscribers only, this function allows you to receive email and system alerts when there are developments from pending, active, or inactive status.

- 1. To get started, go to your Project list and select the folder you want to use this function on.
- 2. To add Legal Status Monitoring, go to Folder Management and simply right click on the folder you want to apply this to.

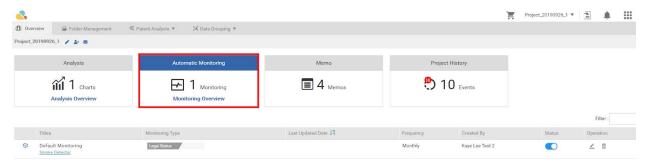


3. Create your settings as necessary.



You can filter the legal status process of the patents to fine-tune your monitoring. The picture above is the default setting. You can edit the legal status to your preferred setting, for example from Pending  $\rightarrow$  Abandoned and pull out patents that match the status you set up.

4. Easy Tracking of Updates at a Glance: Click **Monitoring Overview** in automatic monitoring tab to check out the legal status changes.



5. Then, the overview of legal status will appear.



Monitoring Overview allows you to check which patents have been updated in terms of the legal status. Any updates to the patents are represented by green and grey; green represents new status updates and grey represents non-new status updates.

6. Click on Legal Status to view a summary of changes in chart form.



- → Examination
- → Granted (Pre-Grant Publication)
- → Abandoned Appl.
- → Expired / Reissued
- → Lapsed / No Active State
- → Revoked / Withdrawn
- → Reinstate to Active / Pending

There are the 7 most critical status types during the lifetime of a patent (from inactive to active and vice versa.) Legal Status Monitoring allows you to prepare or make the next move on the patents that you are interested in.

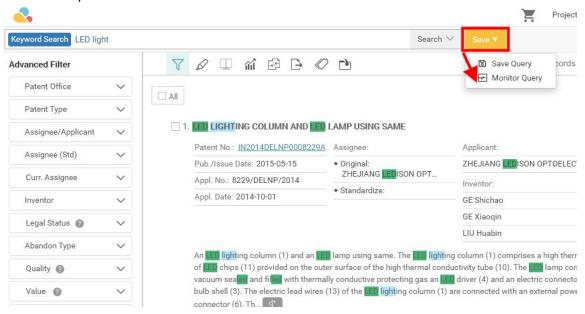
- Examination
- Cranted Pre-Grant Publication)
- Abandoned Appl.
- Expired / Reissued
- Lapsed / No Active State
- Revoked / Withdrawn
- Reinstate to Active / Pending

## **New Patent Monitoring**

Query monitoring is available for Patent subscribers who also purchased Patent Vault. This feature allows you to automatically monitor and display the results of your monitor query on a predetermined schedule. To create Query Monitoring, use Patent Search. To view Query Monitoring results, use Patent Vault.

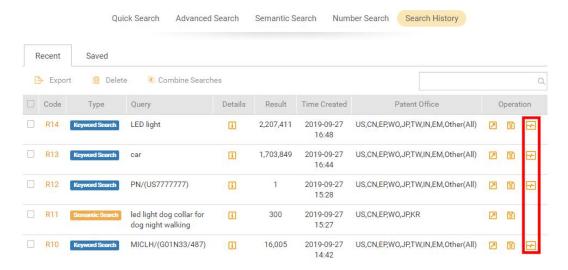
#### Creation:

- 1. On Patent Search, enter a query and click on Search.
- 2. On the search results page, click on the **Save** dropdown button and choose **Monitor Query** to set up a new monitor.

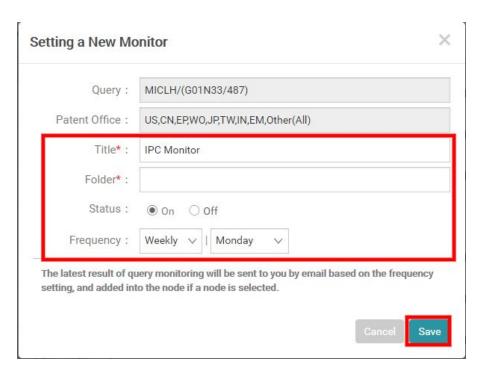


3. If you have previously done a search query and want to monitor the same, you can access this in **Search History**.





4. Once you click on Monitor Query, you can set a Title and save it into an existing folder in your Patent Vault project or create a new folder, and set the notification frequency.

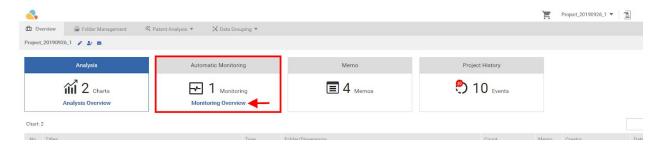


#### Viewing:

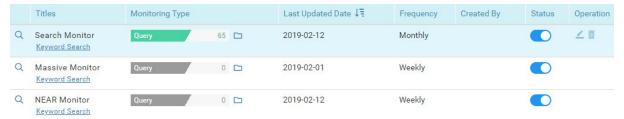
1. There are two ways to view status updates of queries being monitored: first, click on your Account icon and select **Automatic Monitoring**.



Second way is to go to your project Overview and click on Monitoring Overview under Automatic Monitoring.



2. In the Automatic Monitoring page, you will see your queries here. Once new results are available, the update status bar will change from gray to green. The number of new patents available will be included as well.



If you add the patents from the search results of the monitoring query to Project, simply click on the folder icon (which is located right next to the update status bar) to access the folder containing the search results.



3. Automatic Monitoring feature gives you a more aesthetically pleasing and easy to navigate user interface. Further introductions are below:

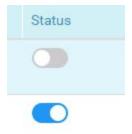
#### Quick Search link

Click on the "Keyword Search" link located under the title to perform a brand new search with the same query. Alternatively, just hover the cursor over it to get a reminder of the search parameters.



## Status Toggle

You can start and stop monitoring with a single click: the newly-added status toggle means that you will no longer need to access the edit window



#### Monitoring Results Chart

Never miss a new patent again: click on the Monitor Type bar to browse through the update history with the convenient chart and click on any dot to view the details relating to the corresponding date. Additionally, you can add to Project and/or export the data.



$\Box$	-					515 re	results
□ #	Patent No.	Title	Pub./Issue Date	Appl. Date	Assignee	Assignee (Std)	î
□ 1	EM005813664-0001	Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]. Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLELLC	
□ 2	EM005813664-0002	Affichage sur l'écran,Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 3	EM005813664-0003	Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]. Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 4	EM005813664-0004	Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]. Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 5	EM005814035-0001	Affichage sur l'écran,Interfaces utillisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 6	EM005814035-0002	Affichage sur l'écran,Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLELLC	
□ 7	EM005814035-0003	Affichages d'écrans d'ordinateurs, Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 8	EM005814035-0004	Affichage sur l'écran,Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
□ 9	EM005814043-0001	Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]. Interfaces utilisateurs graphiques [affichage sur écran d'ordinateur]	2018-11-15	2018-10-31		GOOGLE LLC	
П 40	ENADOEDS 40.42.0000	Interference with the control of the land of the control of the co	2010 11 15	2010 10 21		000015110	

## Data Search and Filter

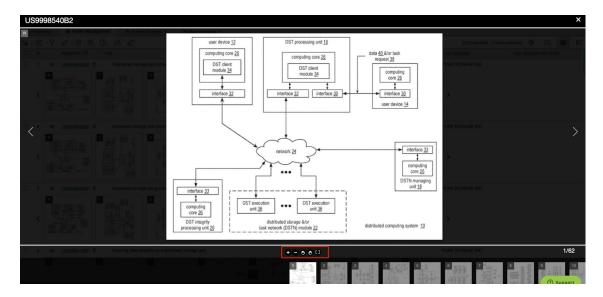
## **View Modes**

Patent Vault offers 3 different view methods: Gallery, Summary, and List. Click on the icons to quickly switch viewing modes.



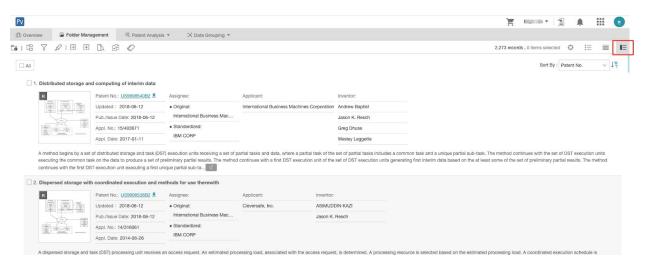
Gallery Mode : View all of the patent figures right on the patent list page
 To select which columns are displayed, please refer to this <u>section</u>.

You can click on a patent figure to view available tools such as Zoom In, Zoom Out and Rotate.

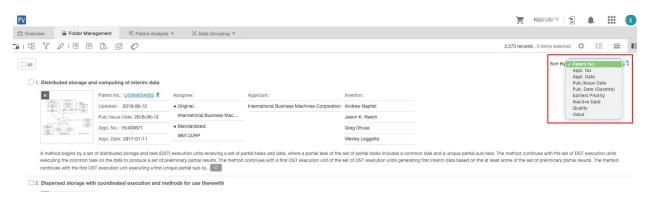


• Summary Mode : View the representative figure and bibliographical details

To select which fields are displayed, please refer to this <u>section</u>.



Select your Sort By preference in this view. It will apply to all other view modes.

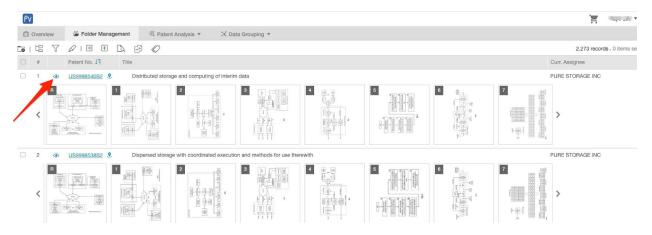


• List Mode  $\sqsubseteq$ : View patents in a list format

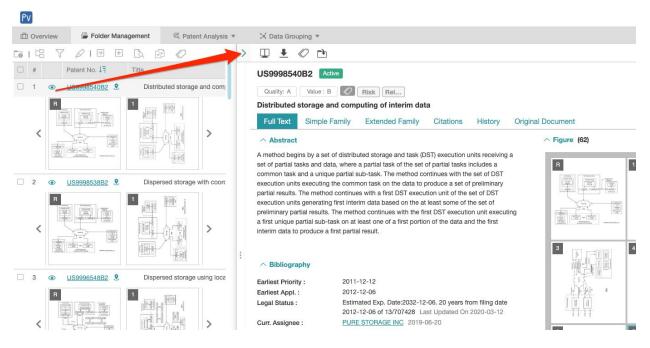
To select which columns are displayed, please refer to this <u>section</u>.



**Split View** is available in List Mode and Gallery Mode. With this view, users can see the patent list on the center panel and the patent document on the right panel.



Click on the preview icon to open the patent page on the right panel. To collapse this panel, click on the arrow icon.

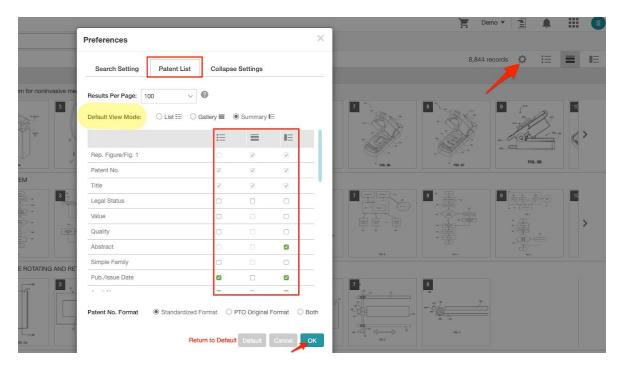


Note: Tools such as Filter, Highlighter, and Export, among others, on the patent list page are disabled in Split View.

Click on the patent number to open the patent page in a new tab.

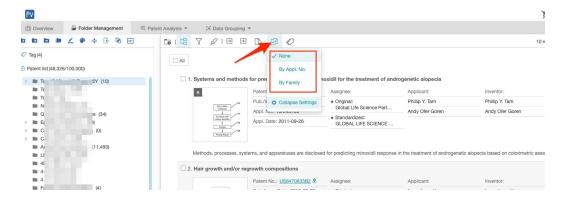
## Set Preferences for View Modes

You can select and save your display options for each view mode in Preferences . Some options may be disabled under each view mode.

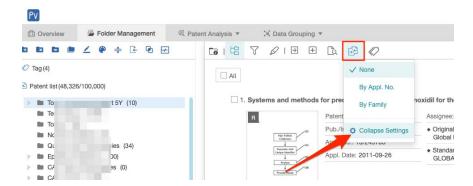


## Collapse

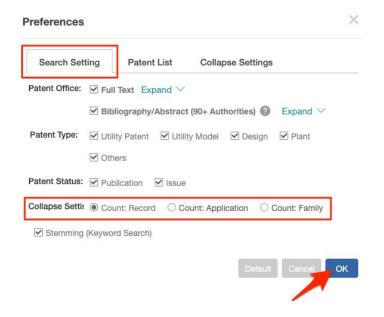
Collapse the patents within any folder by application number or by family. Simply select the folder and click on the Collapse icon .



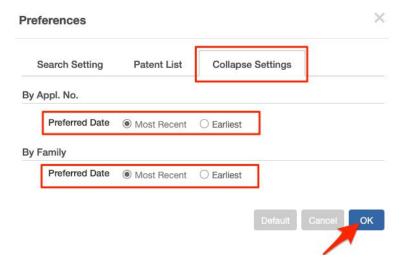
To set your own preferences as the account default, click on Collapse Settings.



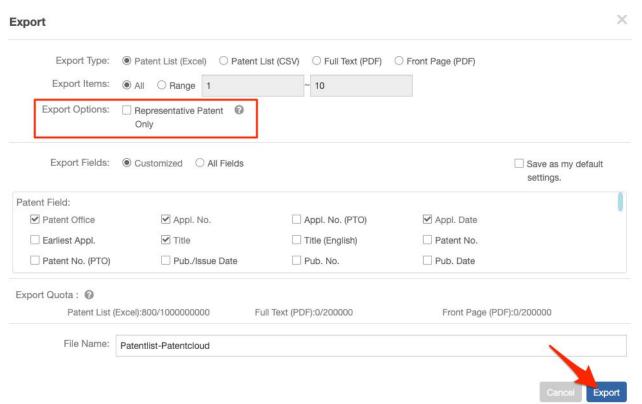
Then under Search Setting, select your Collapse Setting. Then, click OK to save.



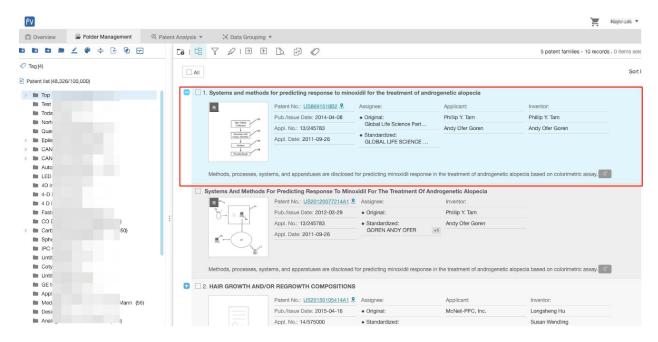
Under Collapse Settings, select your sorting preference: by Most Recent or by Earliest date.



To export collapsed results, there will be an additional selection for Export Options: Representative Patent Only.



Representative Patent pertains to the first or visible result on the search results page once the collapse feature is activated (refer to the image below).

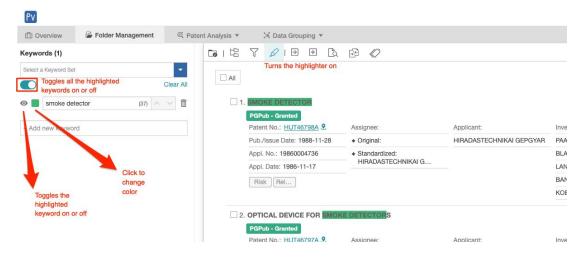


# Highlighter

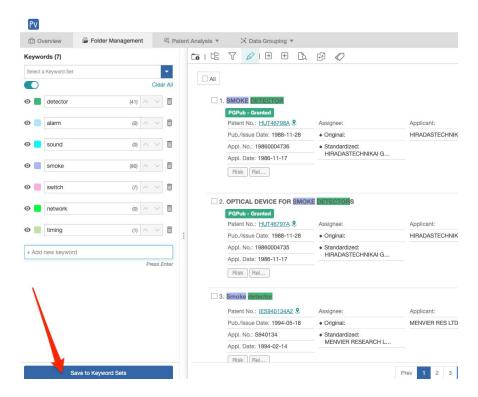
## **Highlighter within Folder Management**

Users can highlight keywords to easily locate patents within a folder or sub-folder.

Click on the **Highlighter** icon to see the Highlighter panel. Enter a specific word or phrase you want to highlight in the text box and click Enter. The keyword will then be highlighted in a specific color throughout the current folder. If you want to change the color of the highlight, click on the color of the highlight and a color palette will appear from which you can select another color. The numbers in parentheses in the colored text box displays the total number of occurrences of that keyword on the current page.



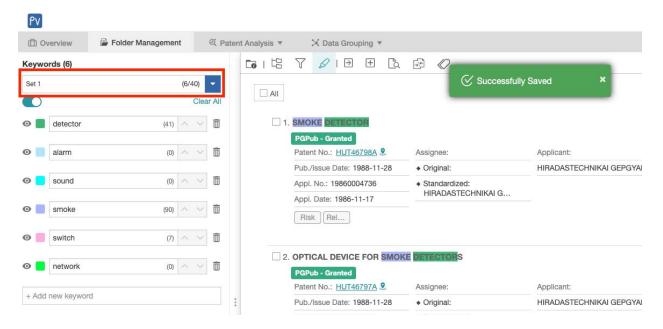
To store your frequently-highlighted keywords for recurring use, click on Save to Keyword Sets.



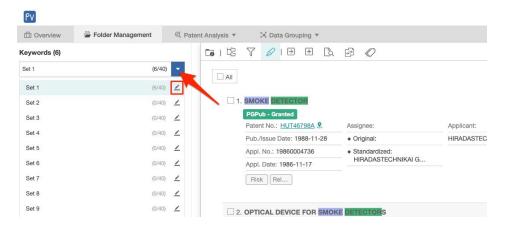
You can save up to 10 keyword sets that can store up to 40 keywords each. Select an empty set where you want to save the keywords. By default, they are named Set 1 to Set 10, which can be renamed.



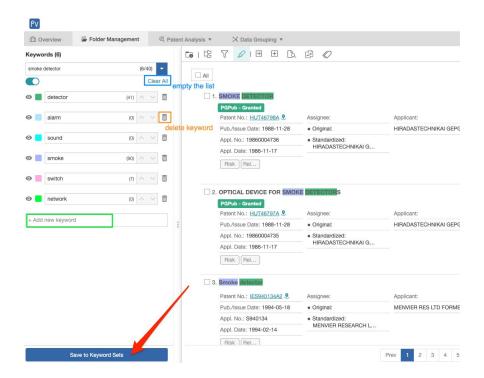
There will be a prompt showing whether the keywords were successfully saved or not. The number next to the set name will also reflect the number of keywords.



• To rename the Keyword Set, click on the Select a Keyword Set dropdown list and click on the Edit icon.



 To add or delete keywords in an existing Keyword Set, click on the Select a Keyword Set dropdown list and click on the set you wish to change. You can empty the list, delete individual keywords, or add new ones.

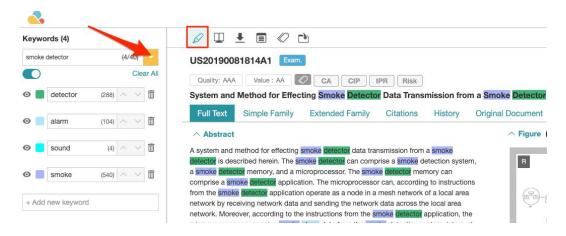


This will replace the existing set. Click on Save to Keyword Sets and select the set that you wish to replace. Then, click Confirm to proceed.



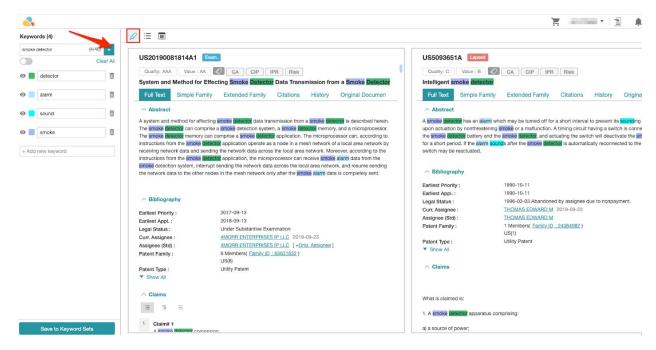
#### Highlighter within patent pages

The same Highlighter functions are available on individual patent pages. Any changes done to a Keyword Set will automatically take effect across all Patentcloud pages.



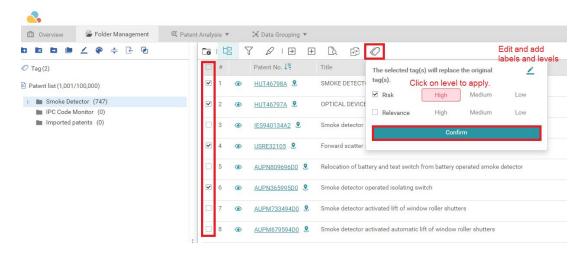
Highlighter when comparing patents

The same Highlighter functions are available when comparing two or more patents. Any changes done to a Keyword Set will automatically take effect across all Patentcloud pages.

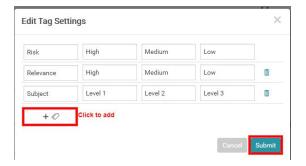


### Tag

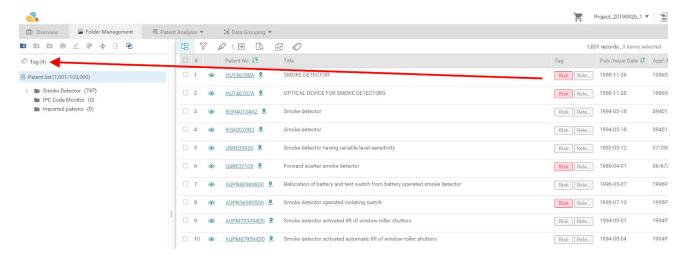
Tag patents right in your folder or sub-folder. Select the patents you want to tag and click on the **Tag** icon from the toolbar. You can choose from the default labels: Risk and Relevance, and select the type or ranking, say, either High, Medium, or Low.



By clicking on the **Edit** button, you can customize your labels by editing the label dialog box. You can create a new label, give it a subject (used for comparison, which may include products, technology, patents, etc.), a label name, and a range.



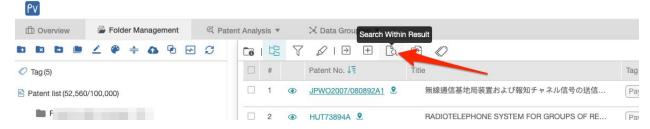
You can also view the tagged patent/s in your Tagged folder.



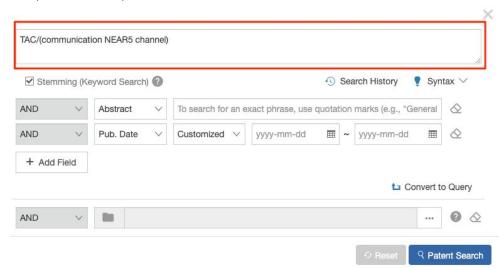
#### Search Within Result

1. Conduct a second search within your folder/s. If you want to search within a specific folder or subfolder, click on it. Otherwise, you can click on the Patent List to search in all folders.

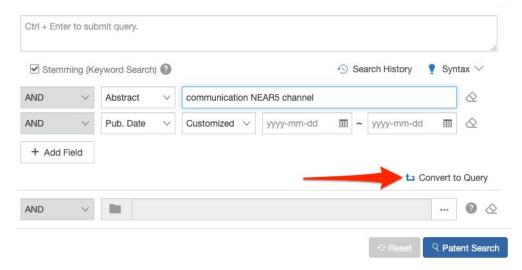
Then, click on the Search Within Result icon  $\Box$  .



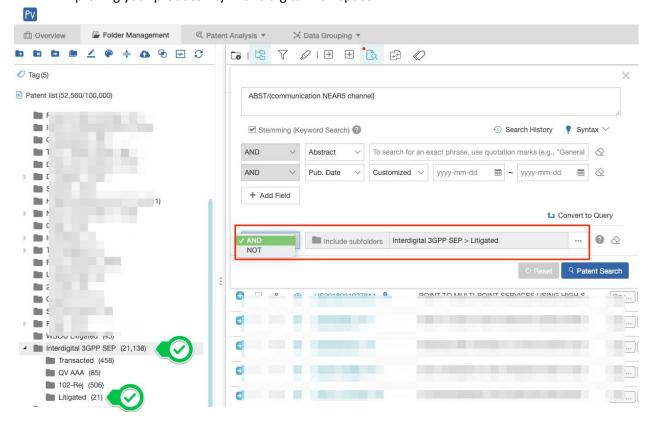
2. Enter your search criteria in the search box. You can also use keyword search syntax and Boolean operators (NOT/AND/OR) to obtain a more accurate result.



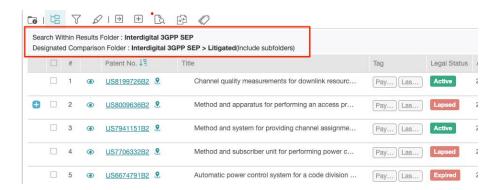
If you're using the dropdown menu, make sure to click on Convert to Query to apply. Then, click on Patent Search.



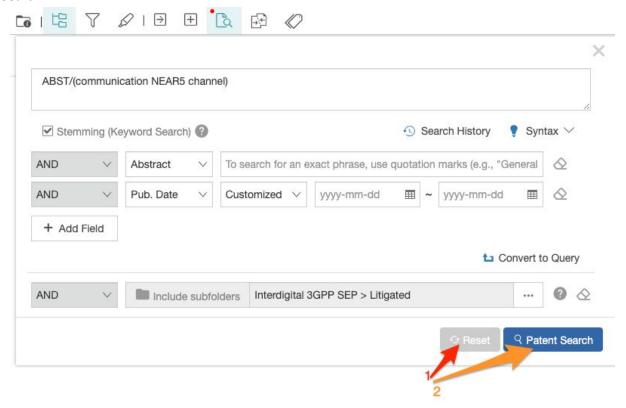
3. A search can also be conducted between two selected folders. Adjust your search scope by selecting another folder or sub-folder to include (AND operator) or exclude (NOT operator) - improving your productivity in this digital workspace.



To illustrate, the example above will search for (communication NEAR5 channel) in the abstract of patents that are stored in both 'Interdigital 3GPP SEP' and 'Litigated' folders.



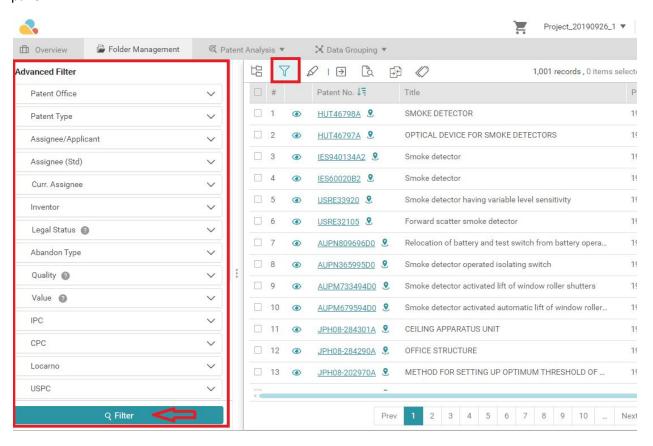
To stop the current search, click on the Search within Result icon  $\Box$  . Click on Reset, then on Patent Search.



## **Filter**

Patent Vault users can further filter the search results by using the advanced filters on the left-side of the search results page. You can filter your results by PTO, patent type, assignee/applicant, assignee (Std), current assignee, inventor, legal status, abandon type (for abandoned legal status), quality, value, IPC, CPC, Locarno, USPC, FI, agency, primary examiner, and kind code. Each filter shows the first 10 items - click on **More+** to show the next 10.

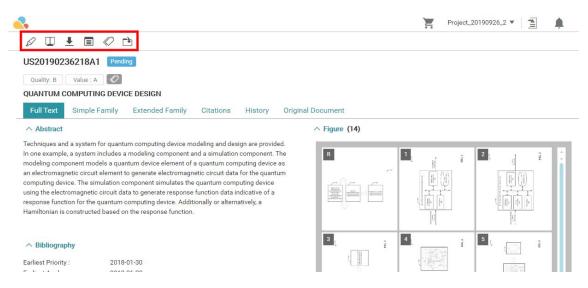
Note: Make sure to switch from the Folder icon  $\Box$  to the filter icon  $\Box$  to show the Advanced Filter panel.



# Page View

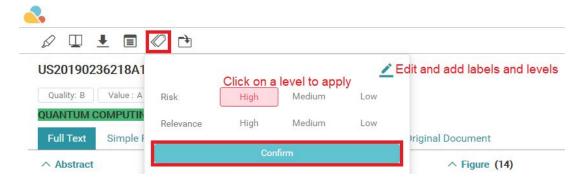
# Page View Features

Patent Search provides a variety of useful services, including:

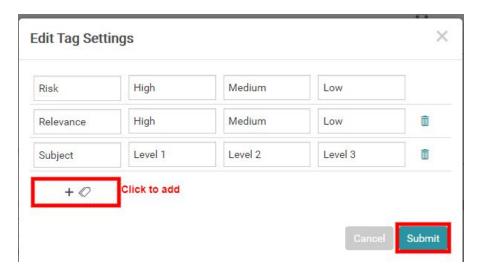


- 1. Download Full-text 

  ∴ Click the **Download** button to download the full-text content of the patent in PDF.
- 2. Tag: You can use the **Tag** icon from the toolbar to add tags to a patent. Once a patent is tagged, it is added to the Tag folder in your project in Patent Vault. The default labels you can use for the tag function are Risk and Relevance. You can set these labels to three types or rankings, say, either High, Medium, or Low. You can view the tagged patent and its Risk/Relevance label in your Tagged folder.



By clicking on the **Edit** button, you can customize your labels by editing the label dialog box. You can create a new label, give it a subject (used for comparison, which may include products, technology, patents, etc.), a label name, and a range.



3. Highlighter : Refer to this <u>Highlighter article</u>.

# **Page View Information**

Patentcloud patent page provides a variety of useful information, including:

**Full text** 

**Simple Family** 

**Extended Family** 

Citations

**History** 

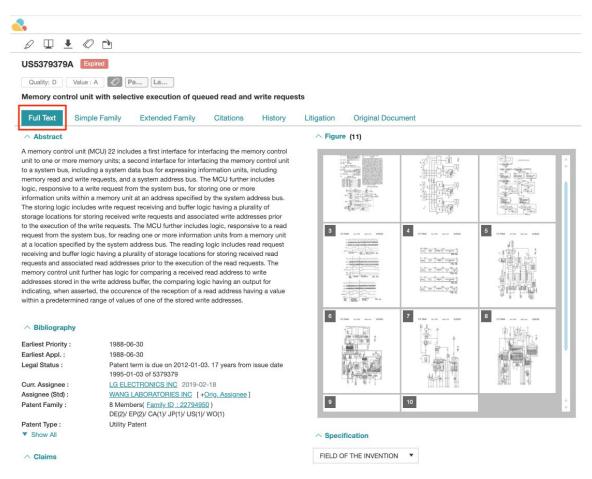
**Litigation** 

**SEP Declarations** 

**Original Document** 

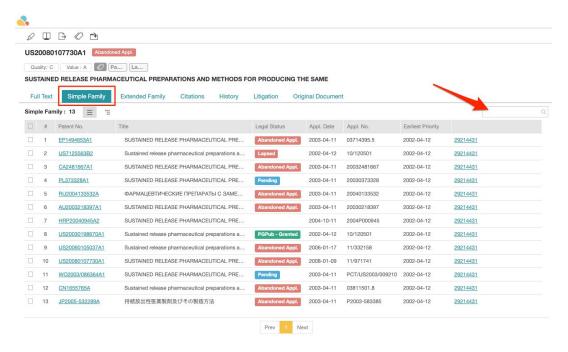
#### Full text

View basic information of the patent such as Title, Abstract, Legal Status, Quality and Value (PS Advanced users only), Bibliography, Figures, Claims, and Specification.

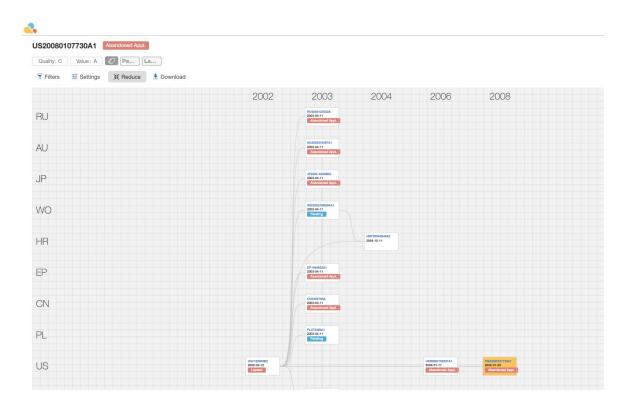


#### Simple Family

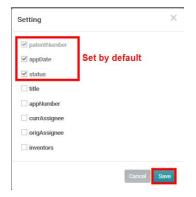
Following EPO's definition, a simple family covers a single invention and members have exactly the same priorities.



Under the List view  $\equiv$ , you can use the Search bar to narrow down results. Switch to the Tree view to visualize patent jurisdictions and application timeline of family members. The highlighted patent pertains to the patent page currently in view.



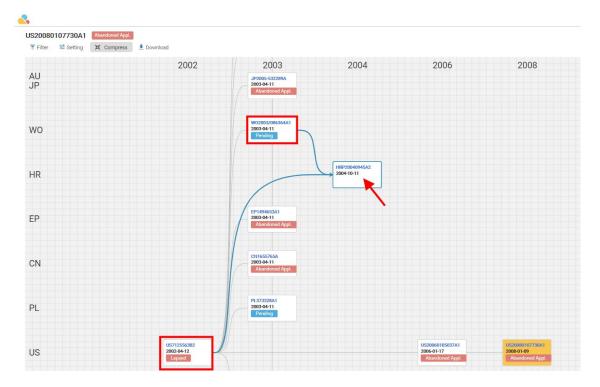
Click on the **Filters** icon  $^{\text{T}}$  to narrow down results by patent office and application date. Define the patent data fields you want to be displayed by clicking on **Settings**  $^{\text{T}}$ .



Click on the **Expand** to use a larger portion of the screen. To download as a JPG image, set the view (zoomed in or zoomed out) you want to get before clicking on **Download**. Whatever part or area is shown on screen, it will reflect on the downloaded image. Users can use either the zoom in and zoom out controls on the upper right corner or your own computer's zoom shortcuts.



The view also shows the Earliest Priority mapping so users can quickly see the relationship among family members. In the example below, clicking on the Croatian patent will show blue arrow connectors from US7125563 (claiming priority) and WO2003/086364 (PCT application). These arrow connectors also appear in the JPG image when downloaded.

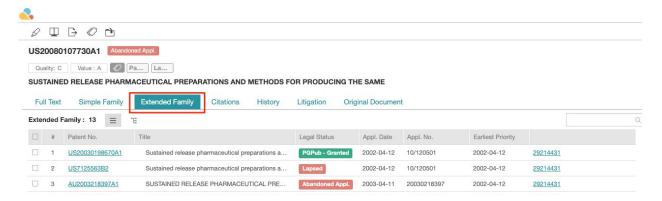


Hover your mouse over a patent to see its title, legal status, abstract, bibliography, and figure. Click on the resulting display to open its patent page in a new tab.



#### **Extended Family**

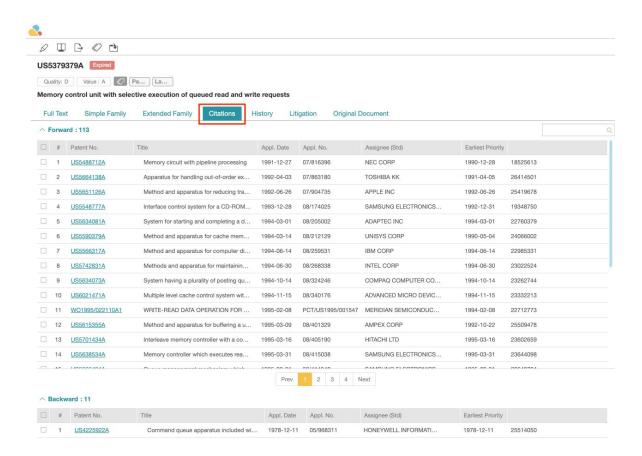
Following EPO's definition, an extended family covers similar technical content and members have at least one priority in common with at least one other member (directly or indirectly).



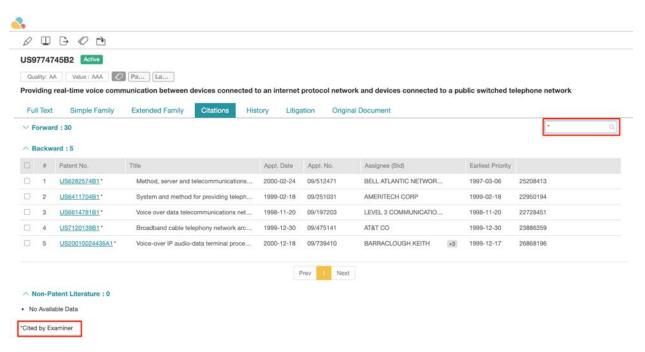
This tab has the same features as Simple Family.

#### **Citations**

A citation is a reference to a previous work (prior art) that is considered relevant to a current patent application. There are two different types of citations: backward and forward citations. Backward citations are patents that are cited by a specific patent and forward citations are subsequent patents that cite that specific patent.

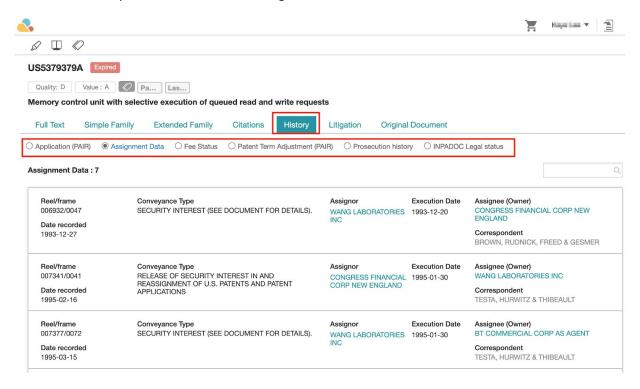


You can filter out citations by examiner by using the Search bar to look for \*.



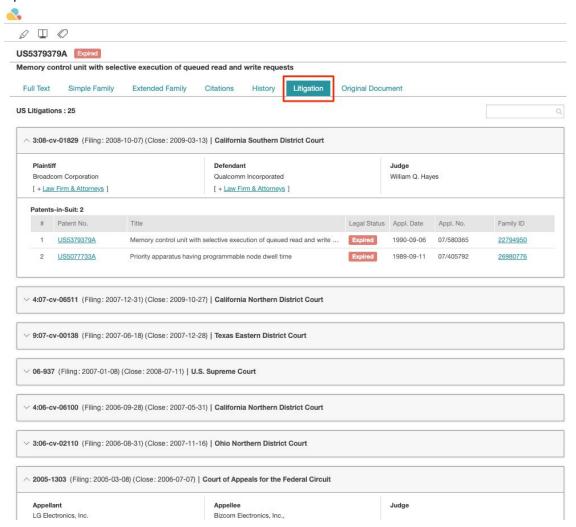
#### History

This tab provides Application (PAIR) data, Assignment Data, Fee Status, Patent Term Adjustment (PAIR), Prosecution History records, and INPADOC Legal Status.



## Litigation

View any US patent's involvement in District Court, ITC, PTAB, Court of Appeals for the Federal Circuit, and Supreme Court cases.



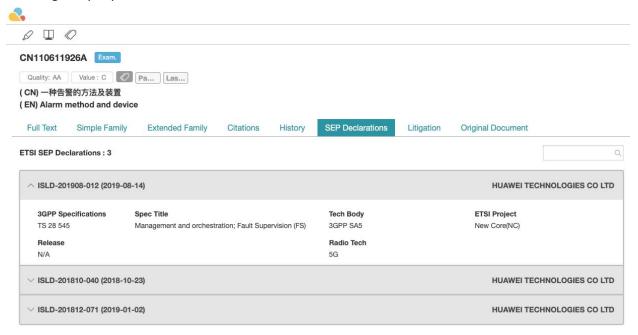
Case records are updated everyday from PTAB Open API and authorized sources. Data coverage for each jurisdiction is as follows:

Jurisdiction	Filing Date (Start)
ITC	1972/04/04
PTAB	2012/09/16
District Court	1980/02/05
Court of Appeals for the Federal Circuit	1991/06/07
Supreme Court	2004/03/03

#### **SEP Declarations**

Standard essential patents (SEPs) with 3GPP specifications published by ETSI have a dedicated SEP Declarations tab.

It shows the ISLD number, specifications and spec title, tech body, release number, radio tech, and the declaring company.



For a complete and interactive SEP database, get your free trial access here.

#### **Original Document**

View and download or print the PTO document in PDF format in this tab.

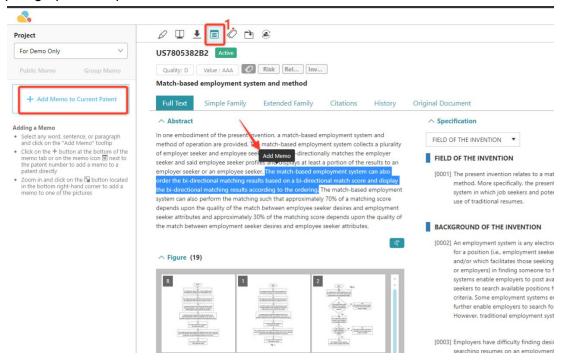


### Memo Management

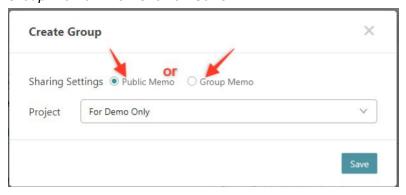
Patent Vault includes a powerful Memo Management feature that allows you to write and edit memos. Patent Search subscribers with Patent Vault can use this feature.

#### Memo Editor

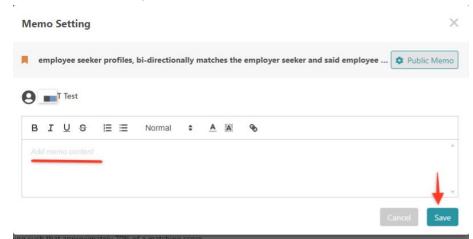
1. After enabling memo mode from the toolbar, simply select any word, sentence, or paragraph in the patent text and click on the **Add Memo** 



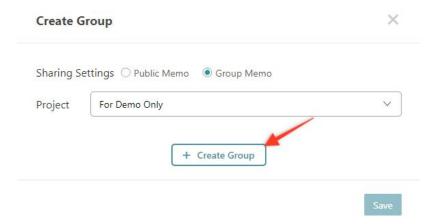
2. The **Share Setting** will pop up, you can choose if the note should be a *Public Memo* or a *Group Memo*. Then Click on **Save**.



2.1. When the Public Memo is selected, you can start typing the note. You can just click on **Save** when you are done.

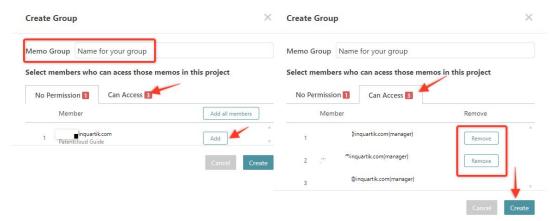


2.2. If this is the first time you use Group Memo, you will need to create a group first. Just click on the create group to set up a Group Memo.



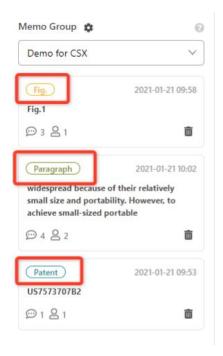
<sup>\*</sup>Once you have created a few Groups, you can just select from a list.

2.3. Next you will need to enter the name of the Group and allow who has the access to the **Group Memo**.



2.4. After you clicked on "Create," simply start typing to add notes to the memo. Then click Save when you are done. Your new memo will appear in the memo tab on the left-hand side of the window.

There are three types (Patent, Paragraphic, or Figure) of memos that mark different elements of a patent document. You can see at the top left of each memo thread to find out which type of the memo is associated with.

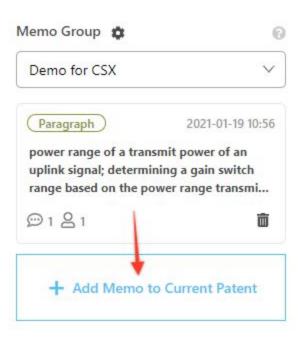


3. The text linked to the note is now underline in orange, once clicked the selected text will be highlighted in blue for easier retrieval:

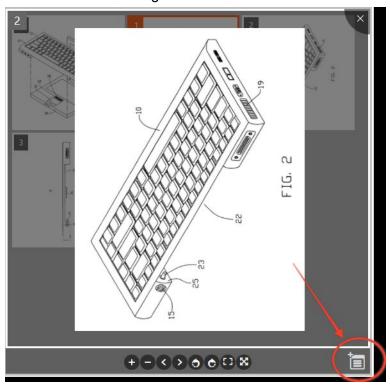
[0004] With the development of computer technology, use of portable computers has become widespread because of their relatively small size and portability.

However, to achieve small-sized portable computers, many typically included expansion ports are not included, and so expandability of the portable computer is thus impaired. To compensate for the impaired expandability, the portable computer is typically provided with a docking station via which the portable computer may be connected with a mouse, a modem, and/or other peripheral equipment.

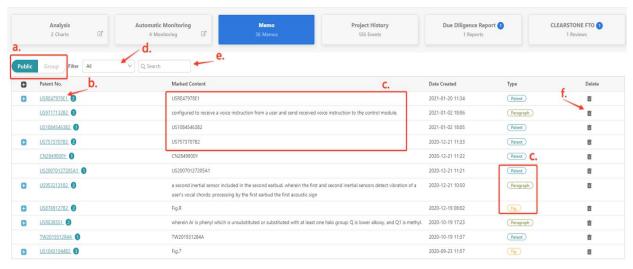
4. To add a memo to the entire patent document, click on the + button on the Memo tab:



5. To add a memo to one of the figures, simply click on the figure and click on the + button located in the bottom right-hand corner:



6. Lastly to review it all in the new Overview page in Patent Vault, you can find the following in the Memo Tab:

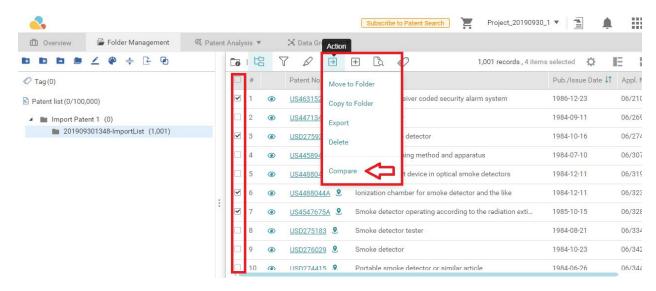


- a. Switch between Public Memo or Group Memo to view the corresponding content
- b. View the memo count per patent
- c. Identify the Types (Patent, Paragraph, Figure) and marked specific text or figure number where the memo is stored

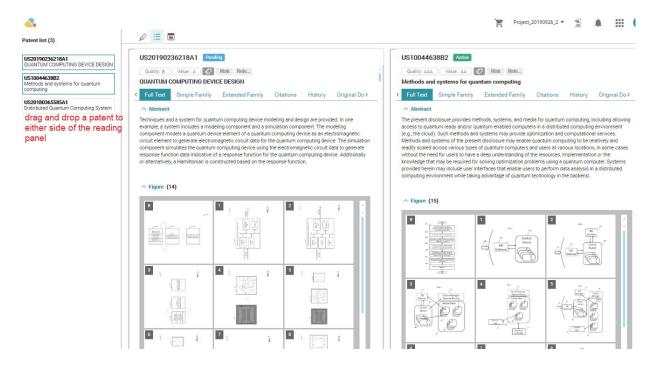
- d. Public memo could filter by your created memos or the memos you commented on
- e. Do a keyword search for patent numbers or the specific text where the memo is stored
- f. Easily delete unwanted memos

# Compare (Patents)

Patent Vault allows the user to quickly and easily compare two patents. Within a folder or subfolder, select patents by clicking its corresponding checkbox. Then, click on the Action icon and select Compare.



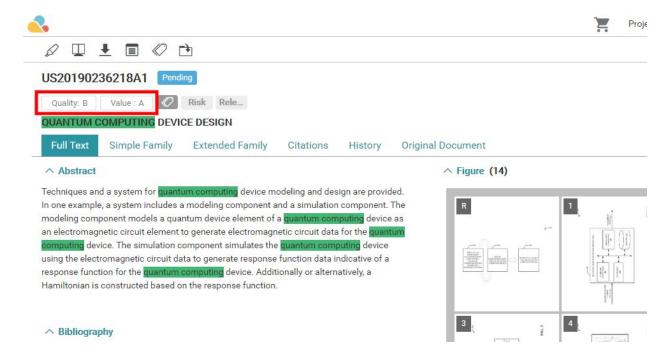
On the Compare page, you can drag and drop any 2 patents from the Patent list panel to either side of the Compare panel.



# **Quality and Value Rankings**

Utilizing Patentcloud's proprietary algorithm, Patentcloud is able to assign a quality and value ranking for each patent. To see the Patent Quality and Value Rankings for a patent, please follow the steps below.

- 1. Perform a patent search and display the patent view's main page.
- 2. Under the patent title you can also see the Patent Quality and Value Rankings of the patent.



Hover over Quality or over Value to look at a brief introduction of these rankings.

# **Visual Analytics**

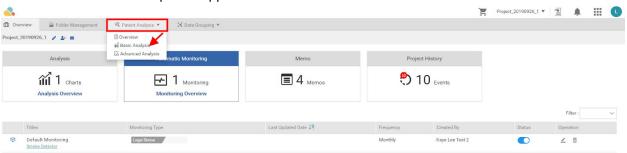
# **Basic Analysis**

Patent Vault allows you to generate a statistical chart for basic analysis.

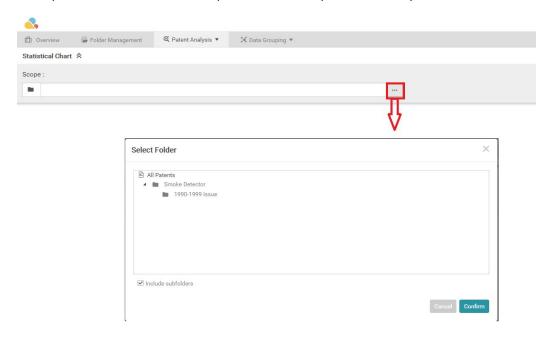
## Statistical Chart for a Project

Patent Vault offers basic analyses on a folder of patent data. To use this statistics feature, follow the steps below:

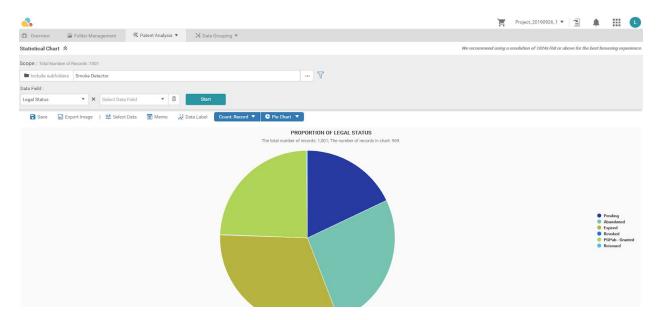
1. In Patent Vault, click on **Patent Analysis** and choose **Basic Analysis** in the drop-down menu, and a new window entitled Scope will appear.



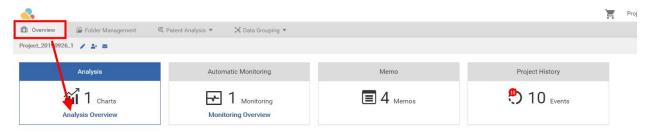
In Scope, select the source of the patents to use in your basic analysis, and click on **Confirm**.



2. Select the parameters you want to use for your chart using the Data Field dropdown, then click on **Start**.

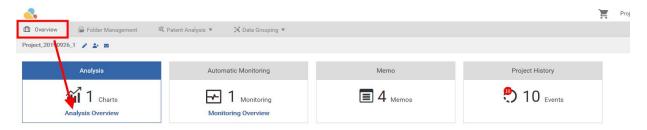


3. Click Save to save the chart in your project, and then open the saved chart in the Overview page, and click on **Analysis Overview**.



If you want to share a chart to the members in your project, please follow the steps below:

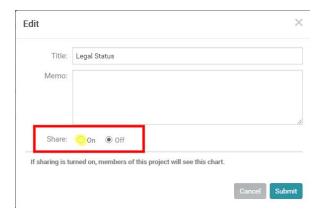
1. Go to Overview and in the Analysis box, click on **Analysis Overview**.



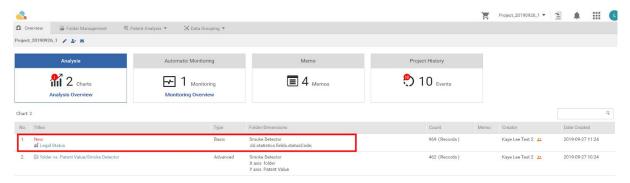
2. Locate the chart title you want to share. Hover your mouse on the title to see icon shortcuts for Edit and Delete.



3. Click on Edit 4 and in the Share field, click on On.



4. Go to Overview and refresh the webpage. This will then be reflected as an additional record in Analysis.

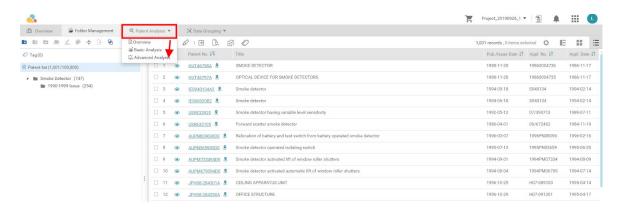


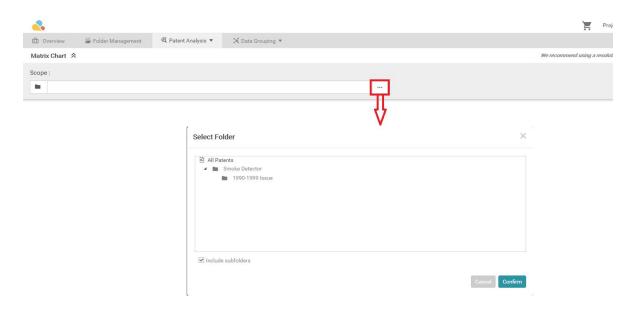
# **Advanced Analysis**

## **Matrix Chart**

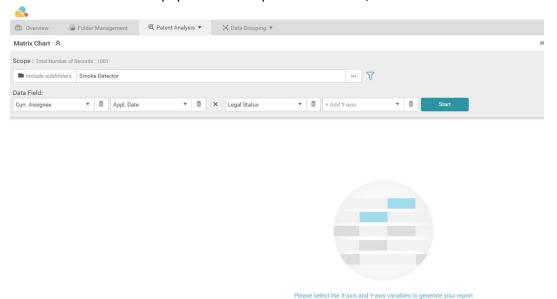
For a spreadsheet-like analysis of patent trends, you can use the Matrix Chart.

Click on the Advanced Analysis option in the drop-down menu, and a new window will appear.
 In Scope, select the source of the patents to use in your advanced analysis, and then click on Confirm.





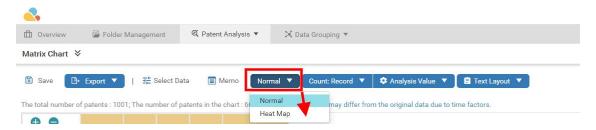
2. For the X-axis and Y-axis, select your desired parameter(s) from the Data Field dropdown. These will be the items that will populate in the spreadsheet. Then, click on the **Start** button.

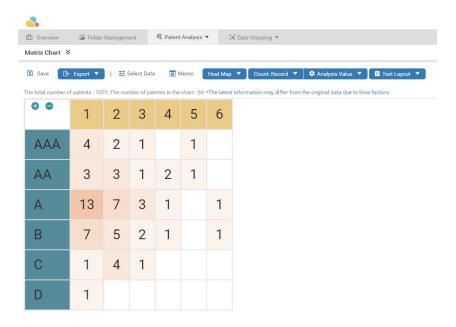


Depending on the amount of data, it may take a few minutes to process and display the Patent Matrix. An example of the Patent Matrix is shown below. As you can see, the X-Axis shows Assignee and Application Year, while Y-Axis shows Legal Status. The orange cells indicate the patent count for that corresponding x and y combination.



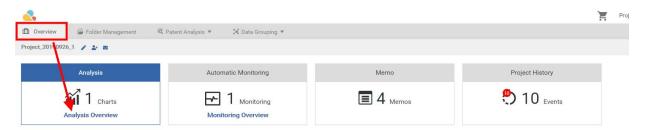
Heat Map view in Matrix is also possible. Simply click on the Normal (default) dropdown and select Heat Map.





If you want to share a chart to the members in your project, please follow the steps below:

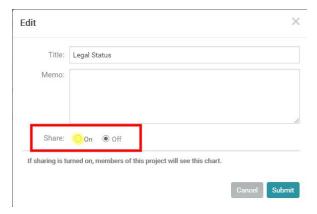
5. Go to Overview and in the Analysis box, click on **Analysis Overview**.



6. Locate the chart title you want to share. Hover your mouse on the title to see icon shortcuts for Edit and Delete.



7. Click on Edit 4 and in the Share field, click on On.

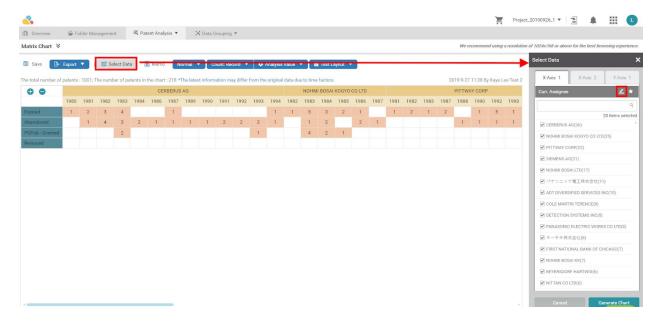


8. Go to Overview and refresh the webpage. This will then be reflected as an additional record in Analysis.

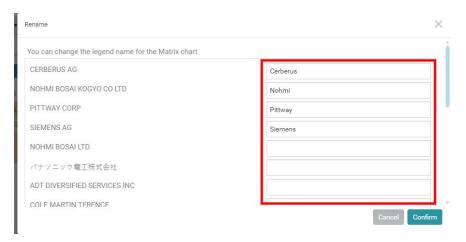


# Renaming a Field in the Patent Matrix (Only for Data Fields under Party)

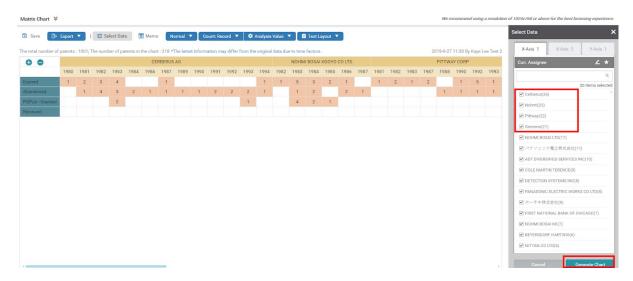
To modify name in analysis, click on **Select Data** then click on the **Rename** icon.



Change the names on the field boxes then click **Confirm**.



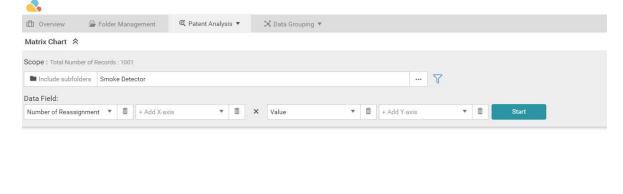
This will automatically reflect in the Select Data panel. Once correct, click on **Generate Chart**.



### Patent Assignments with the Patent Matrix

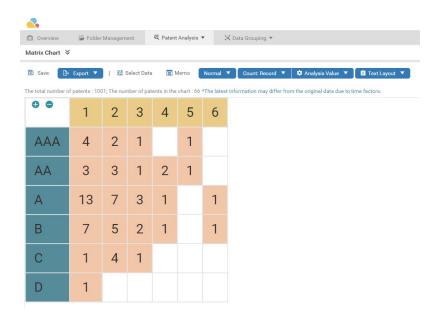
To perform an analysis using assignment data, please follow the steps below:

- 1. Go to the **Advanced Analysis** page on the **Patent Analysis** tab.
- 2. For the X-axis, select a data parameter. In this example, Number of Reassignments has been chosen. For the Y-axis, Value has been selected. Then, click on **Start**.



Please select the X-axis and Y-axis variables to generate your report

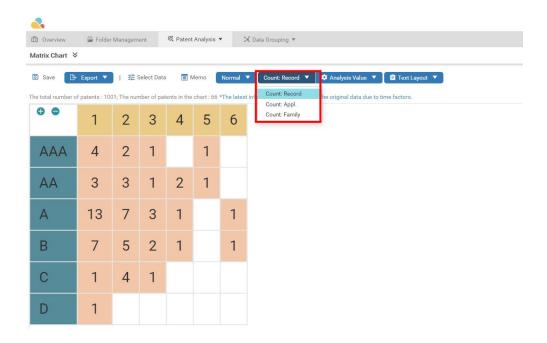
3. After a few seconds, you will see the analysis of the parameters you have chosen. In the example below, there is a discrepancy in the total number of patents vs. number of patents in the chart. This could be that some patents have zero reassignment or have no Value ranking.



### **Family and Application Counts**

In the Patent Analysis section, it is possible to sort and count patents by family and applications. Follow the steps below to perform the count function.

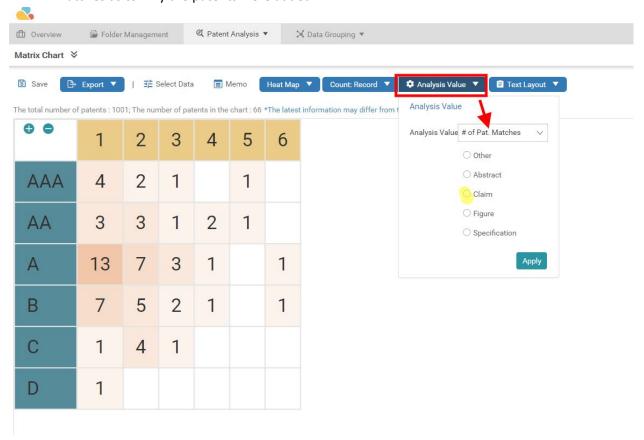
- 1. Go to the **Advanced Analysis** page on the **Patent Analysis** tab.
- 2. Create a Matrix chart and view the chart.
- 3. While viewing the chart, click on the **Count: Patents** button, and a menu will drop down. As seen in the photo below, you can select whether to count by application or by family.



### **Analysis Value**

In the Patent Analysis section, it is possible to analyze the matching items with the patents added to the folders. Follow the steps below to perform this function.

- 1. Go to the **Advanced Analysis** page on the **Patent Analysis** tab.
- 2. Create a Matrix chart and view the chart.
- 3. While viewing the chart, click on the **Analysis Value** button, and a menu will drop down. As seen in the photo below, you can select whether to count by patents, by matching patents, or by matches as to why the patents were added.



# **Data Grouping**

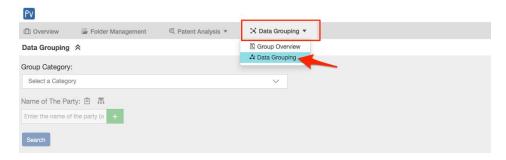
Data Grouping is a feature that enables you to consolidate data together for better visualization. A set of assignees, agencies, agents, inventors, or examiners can be treated as one variable based on your definition.

#### Create a Group

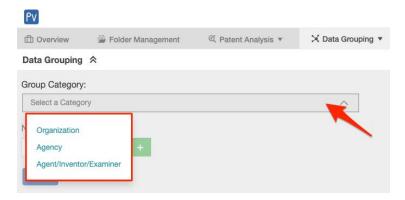
**Use Data Grouping in Analysis** 

### Create a Group

1. Go to Data Grouping.



2. Select the Group Category from the dropdown - if you want to group by Assignee, Agency, or Agent/Inventor/Examiner.



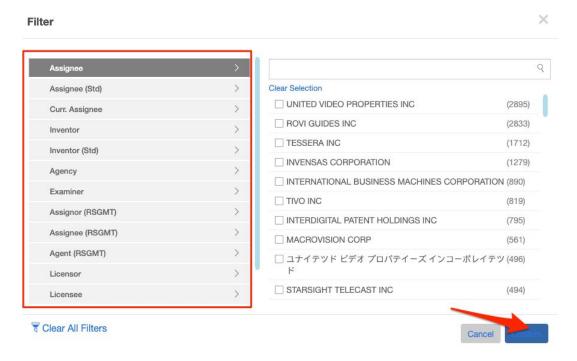
3. Enter the Name of the Party directly in the search box. To view the names you have in your project, click on the Select a Party icon.

Note: You can also use the Corporate Affiliation icon to select affiliates.

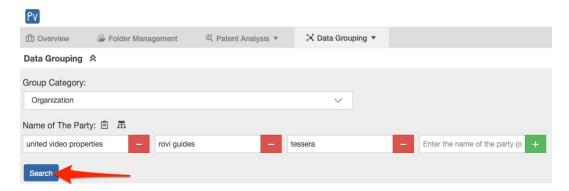


4. Use the Filter and tick the checkboxes of the parties you want to combine in a group. Then, click on Confirm.

Note: You may select multiple party names across different filter categories.



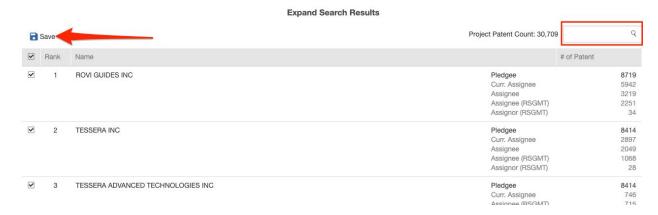
5. Once you have selected the parties that you wish to combine, click on Search.



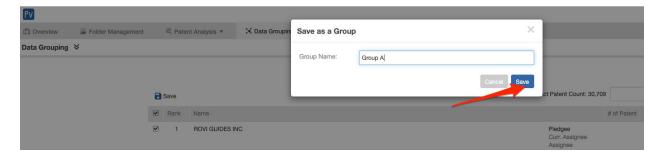
6. An Expanded Search Results will be displayed. It will show the number of patents involving the party/ies' names selected and based on the category selected in the previous step.

Review the list and tick the checkboxes for the parties you want to group together. Then, click Save.

The example below shows the count of patents by organization (pledgee, assignee, assignor) for the 3 parties (United Video Properties, Rovi Guides, Tessera).



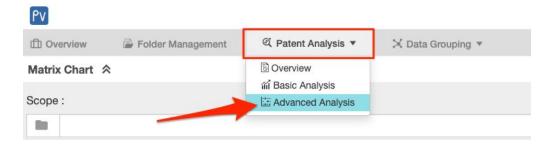
7. Create a Group Name and click on Save.



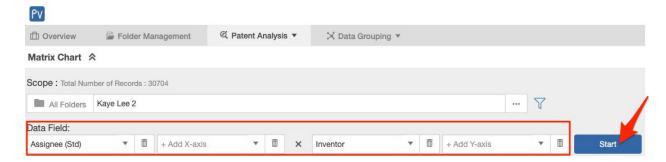
### Use Data Grouping in Analysis

Either in Basic or in Advanced Analysis, you can use your saved data groups as individual variables.

1. Go to Patent Analysis and choose between Basic or Advanced.



2. Set your parameters. Data groups are only available for assignee, agency, agent, inventor, and examiner.



3. Click on Select Data and you will see the data groups that you have created (under Assignee).



4. Select your data group/s and compare it with other party names in the list. Then, click on Generate Chart.



5. A new Matrix Chart will be generated based on your selection.

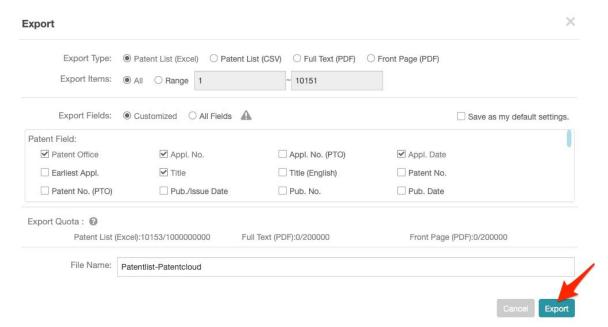


# Export, Import, Save & Add

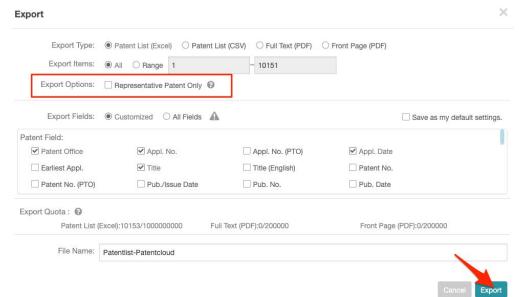
# Export (Patent)

Patent Vault allows users to export search results into a variety of formats, including patent list (.xls and .csv format), patent document full-text (.zip format), and patent document front page (.pdf format).

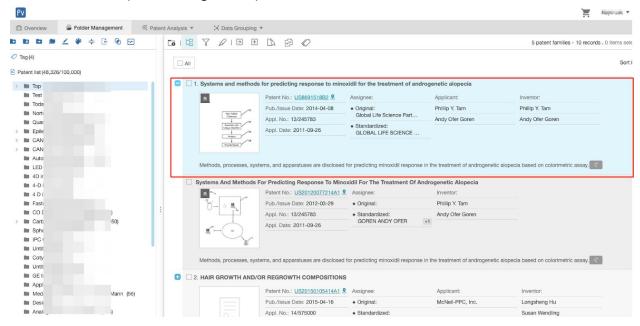
Click on the **Export** icon , and a window will appear. Select the export type, which items and fields to export, check your export quota and give the file name. Then, click on "Export."



If you are exporting results that have been <u>collapsed by application number or by family</u>, there will be an additional selection for Export Options: Representative Patent Only.



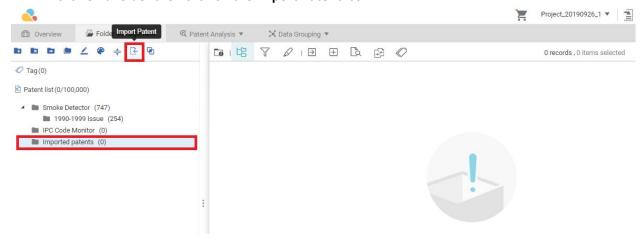
Representative Patent pertains to the first or visible result on the search results page once the collapse feature is activated (refer to image below).



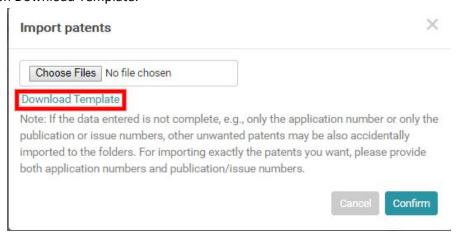
#### Import Patents to Patent Vault

To import patents, please follow the steps below:

- 1. Open Patent Vault and click on your Project.
- 2. In the Folder Management tab, select or add a new folder to import patents to. Make sure to click on a folder then click on the **Import Patent** icon.



3. Click on Download Template.



4. Please follow the rules on the template to fill in a patent number and/or application number. You must fill in at least one of these, or you won't be able to upload to Patent Vault. For importing exactly the patents you want, please provide both the application numbers and publication/issue numbers.

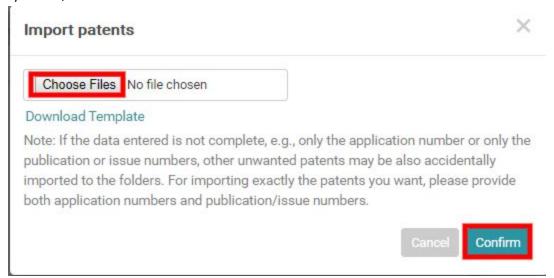
# Templates for Importing Patents and Sub-Folders

#### Rules for Filling in Information

- 1. Please fill in the following field(s): Country, Patent No., Appl No., or Sub-Folder.
- 2. Kindly note that either the Patent No. or Appl. No. must be filled in, or the file will not be able to be uploaded to Excel.
- 3. If the Patent No. or Appl. No. is filled in incorrectly, then that column will not be able to be imported.
- 4. If the Patent No. and Appl. No. are filled in but cannot be matched, then the column will not be able to be imported.
- 5. If the country code (e.g., 7823240B2) is not filled in for both the Patent No. and Appl. No., and the Country field is also
- 6. If only the Patent No. or Appl. No. is filled in, then the corresponding sub-folder should not be filled in. Patentcloud will

Country	Patent No. *	Appl. No. *	Sub-Folder
	-	5	
		0	
	2		
	<i>y</i>		

5. Save it locally in your computer. Once done, repeat Step 1 and click on Choose Files to select your file, then Confirm.



### Add to Project in Patent Vault

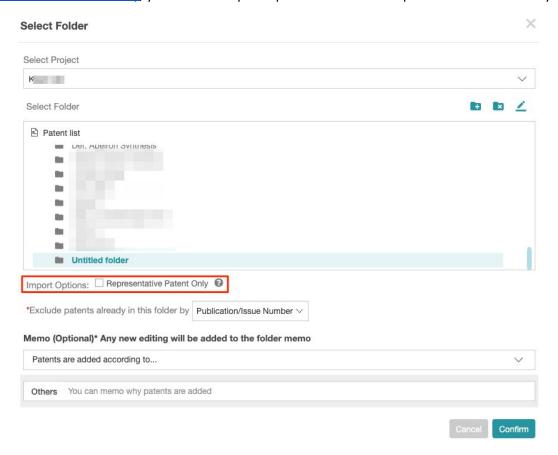
Patent Search users with Patent Vault can save selected search results and add them directly into a project.

#### **Selecting patents**

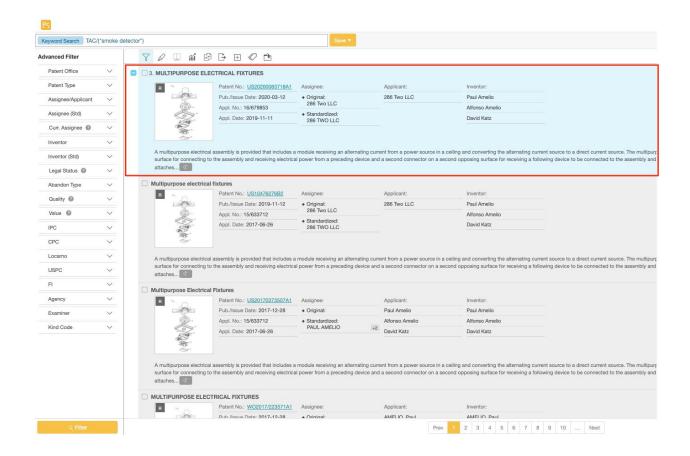
Adding patents into a project

### Selecting patents

To select or deselect all results, please refer to this <u>article</u>. **Caution**: If the results have been <u>collapsed by application number or family</u>, you have an Import Option to select the Representative Patent Only.

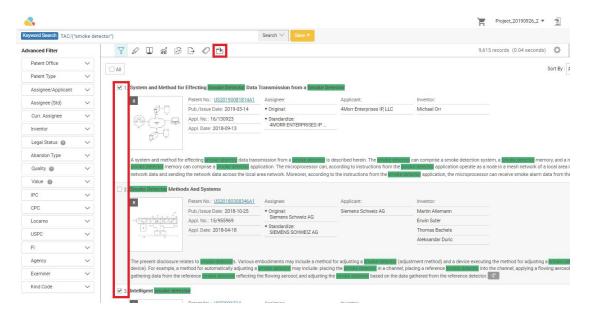


Representative Patent pertains to the first or visible result on the search results page once the collapse feature is activated (refer to image below).

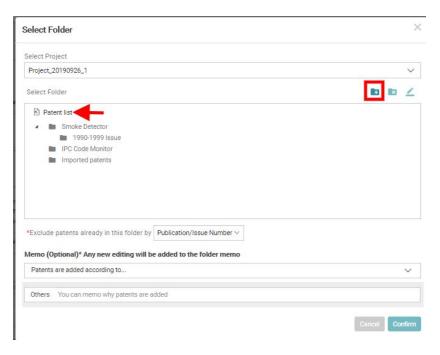


# Adding patents into a project

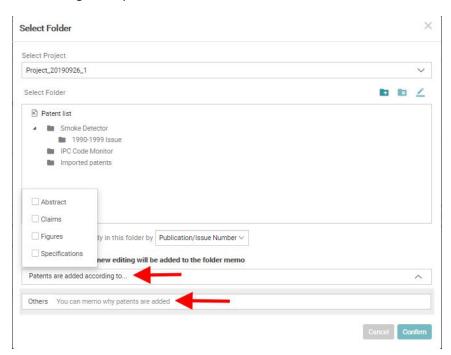
1. After selecting the patents, click on the Add to Project icon .



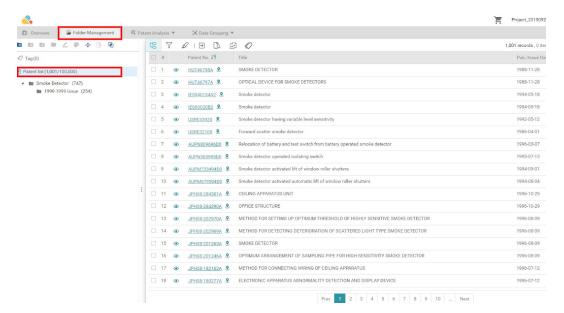
2. Select an existing folder by clicking on the folder name. Otherwise, you can create a new folder by clicking on Patent List then on the Add icon (as shown below). Click on the Edit icon to rename the folder. Then, click Confirm.



3. You can add a memo on why the patents are added into the folder and classify these memos by Abstract, Claims, Figures, Specifications, or Others. Then, click Confirm.



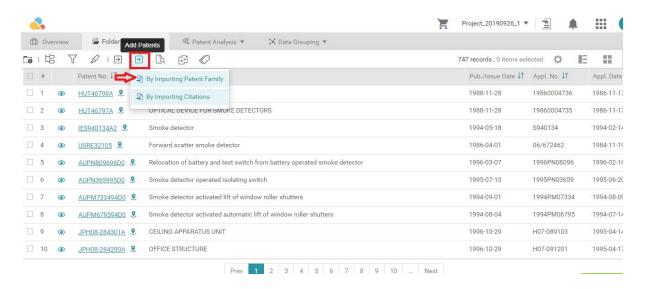
4. Open Patent Vault, select your project, and you can find the added patents in their corresponding folder.



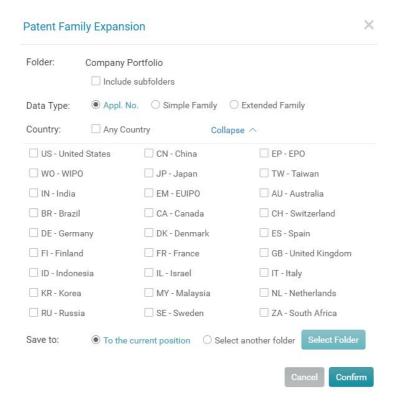
# Family Expansion (Add Patents)

It is also possible to import and search for patents using family identification. To do this, please follow the steps below:

- 1. Within a Project, select the **Folder Management** option.
- 2. Next, select the folder you would like to import the patent family into.
- 3. Click on the Add Patents button, and select the By Importing Patent Family option.



4. The Patent Family Expansion window will appear.



5.	Select whether you would like to import by Application Number, by Simple Family, or by
	Extended Family. Choose the country/ies and the folder you want to save it to. Then, click
	Confirm.

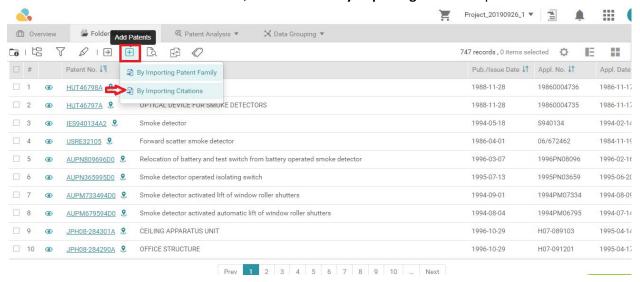
6. After processing, the newly imported family of patents will appear in the designated folder.

# Citation Expansion (Add Patents)

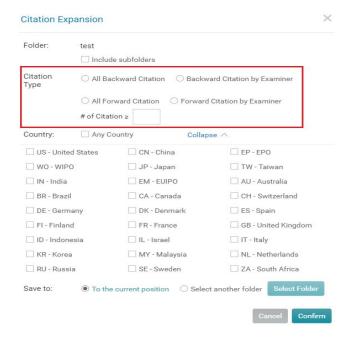
Citation Expansion is used to find patents that have been cited by a specific patent or to find if that specific patent has been cited by other patents. To use Citation Expansion, please follow the steps:

Within a Project, select the **Folder Management** option.

- 1. Next select the sub-folder you would like to import the patent data into.
- 2. Click on the Add Patents button, and select the By Importing Citations option.



3. The **Citation Expansion** window will appear. Select whether you would like to import All Backward Citation, Backward Citation by Examiner, All Forward Citation, or Forward Citation by Examiner. Choose the country/ies and the folder you want to save it to. Then, click Confirm.



4. After processing, the newly imported patent citation data will appear in the designated folder.

January 21, 2021