NAME	**PatentPleeze**
VERSION	4.0 dated January 11, 2007
DESCRIPTION	PatentPleeze provides the user with the ability to obtain patent documents from various countries and analyze the content of these documents.
WORKING ENVIRONMENT	**System Requirements** Internet Explorer 5.0, Acrobat Reader 4.0, Internet Connection,

FEATURES

Download Interface

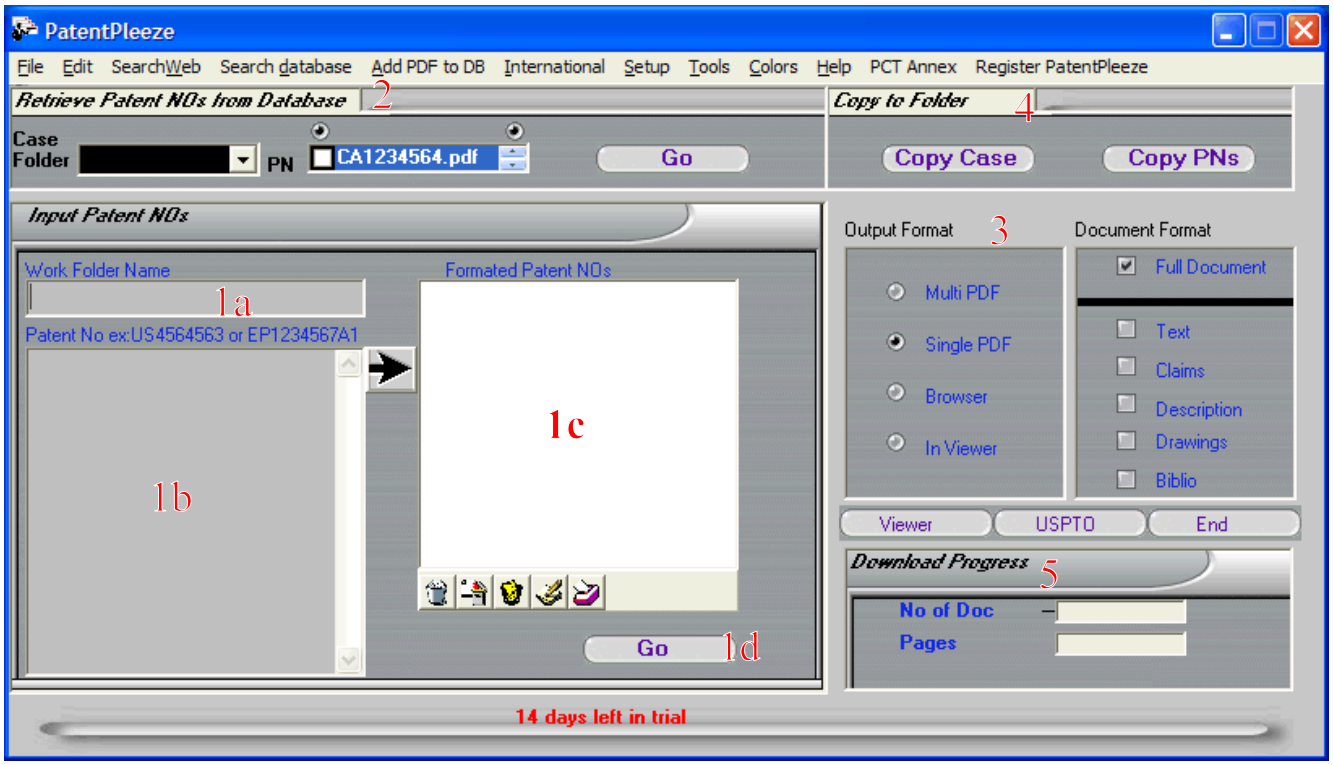
The main goal of **PatentPleeze** is to simplify the retrieval of patent documents (prior art) from various countries and to provide tools for analyzing the patent documents to determine their relevancy and citability in a patent application. Many sources are available to get patent information but they all have some drawbacks; namely viewing one page at a time and printing one page at a time. This can be very frustrating if you are trying to search through many documents. The **Download Interface** uses various websites to gather a collection of single pages to produce complete documents that can be viewed, printed and inserted in databases. By default Esp@cenet is used but it is also possible to use Depatis, USPTO and CIPO.
The resulting database created by the program can be easily searched and accelerates the download process since only one copy of a single document is downloaded. The next time the same document is needed, the program will obtain it from the local database instead of using various websites.

Viewer, Tools, and Analysis Interface

PatentPleeze incorporates various tools to facilitate patent analysis including but not limited to: highlighting keywords, indexing words found in a document, antecedent check, dependency check, comparing documents or claims, OCR, translation and so on.

Download Interface - Main Screen

The different menu items are listed in the toolbar. Clicking on the different menu items will access PatentPleeze's different options and tools.



1. **Input Patent NOs** section is used to download the desired patent documents into the database.
   1a. The ***Work Folder Name*** field is where you enter a folder name or number which will be used to index all the downloaded documents. This is the name you will use the next time you want to retrieve the downloaded documents.
   1b. The Patent No field is where you enter the patent document numbers.
   1c. The **Formatted Patent NOs** field is where the extracted numbers entered in Field 1b will appear. The arrow button will only extract patent document numbers.
   1d. The ***Go*** button begins the download and display of patent documents that are listed in Field 1c.

2. The **Retrieve Patent NOs** from Database field is a quick way of accessing the files in the database.

3. The **Output Format** and Document Format will modify how the documents are displayed for both Field 1 and 2.

4. The **Copy to Folder** field is a way to copy files to another work folder. This is intended for work-at-home use, to quickly download a case folder to a USB drive.

5. The progress indicator will show which document and page the program is presently downloading.

Download Interface - Input Patent NOs Section

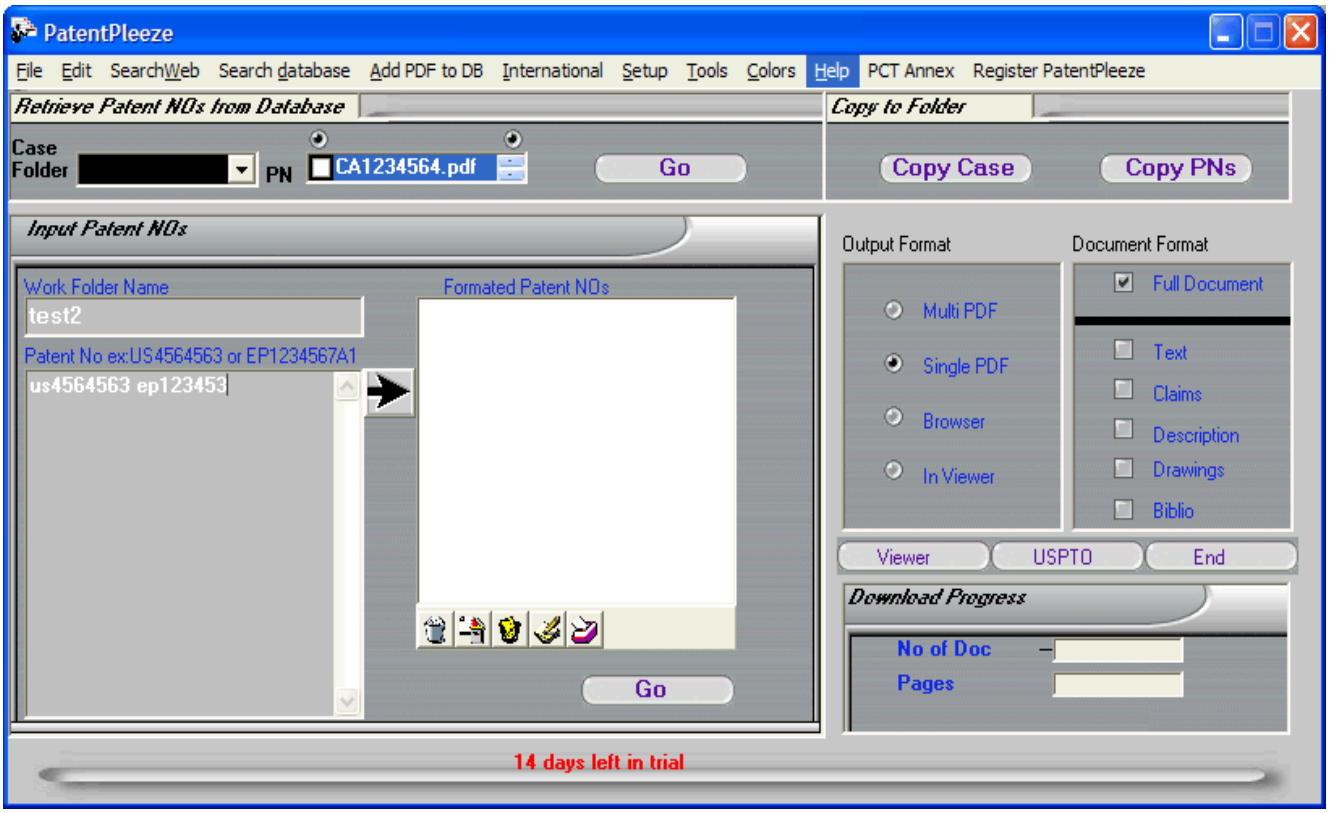
PatentPleeze can download patent documents and organize them into Work Folders using the following tools:

Manual Input - enter patent documents manually

SearchWeb - search patent databases (Delphion, Espacenet, USPTO) within ***SearchWeb*** window and automatically populate search results into **Download Interface**

Manual Input

Step 1. Enter any relevant name into the ***Work Folder Name*** field. Any name can be entered into this field.
Step 2. Enter patent document numbers into the Patent No field. Patent document numbers must be entered using country code followed by the number format (eg. US4564563).
Step 3. Click the arrow button to transfer the patent document numbers to the **Formatted Patent NOs** field. Only formatted patent numbers will be transferred, so you can paste text that contains other words into the Patent No field, but only the formatted patent numbers will be transferred.
Step 4. Select desired Output/Doc Format.
Step 5. Click the **Go** button to commence download.

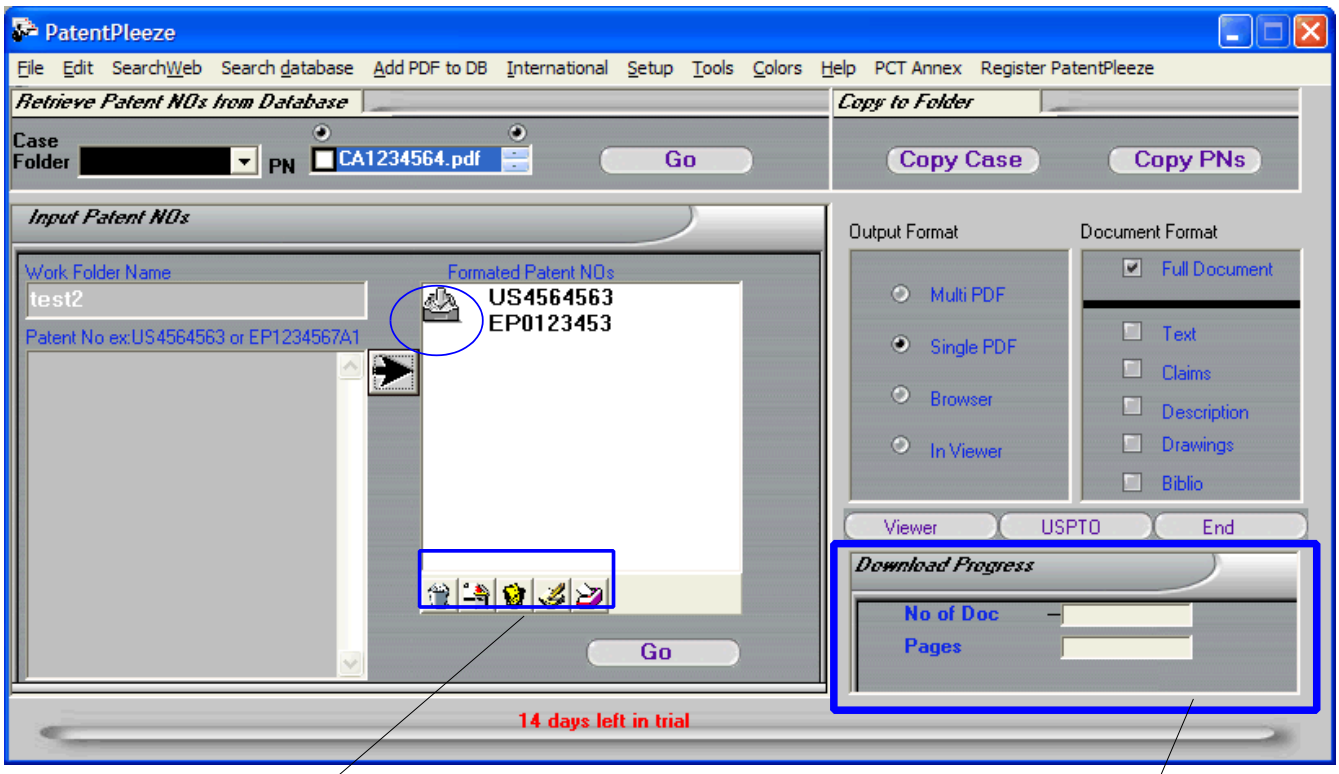


The above steps can be applied to add additional documents to an existing Work Folder. In Step 1, simply enter a Work/Case folder that already exists. In Step 2, enter the patent documents that you want to add into the database under the existing Work Folder.

If an **icon** of an "inbox"  is present, it means that this document has previously been downloaded and is now present in the database. Pressing the ***Go*** button will initiate the download and display of documents according to the **Output Format**.

The ***Go*** button will fetch documents from Esp@cenet. Occasionally it might be preferable to get documents from other sources (namely if the document was not found on Esp@cenet). To obtain a document from a secondary source, it is necessary to click on the document in the listbox for which a download is being requested and then press on the specific button associated with the alternative source ("USPTO" for USPTO or under international by using ~~"DEPATIS~~" (Depatis is no longer working as they are banning IP address of bulk downloader), "Australian", "Canadian" or "IPDL" (Japan)).

Documents retrieved with the ***Go*** button or the "USPTO" button will be entered in the database. Documents retrieved with



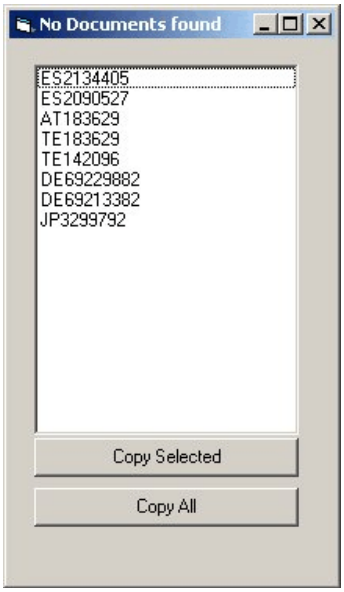
5 functions associated with the list: Delete all, delete one item, erase all selected, edit item and add item.

Lets the user know what is happening with the download.

other sources will not be entered in the database.

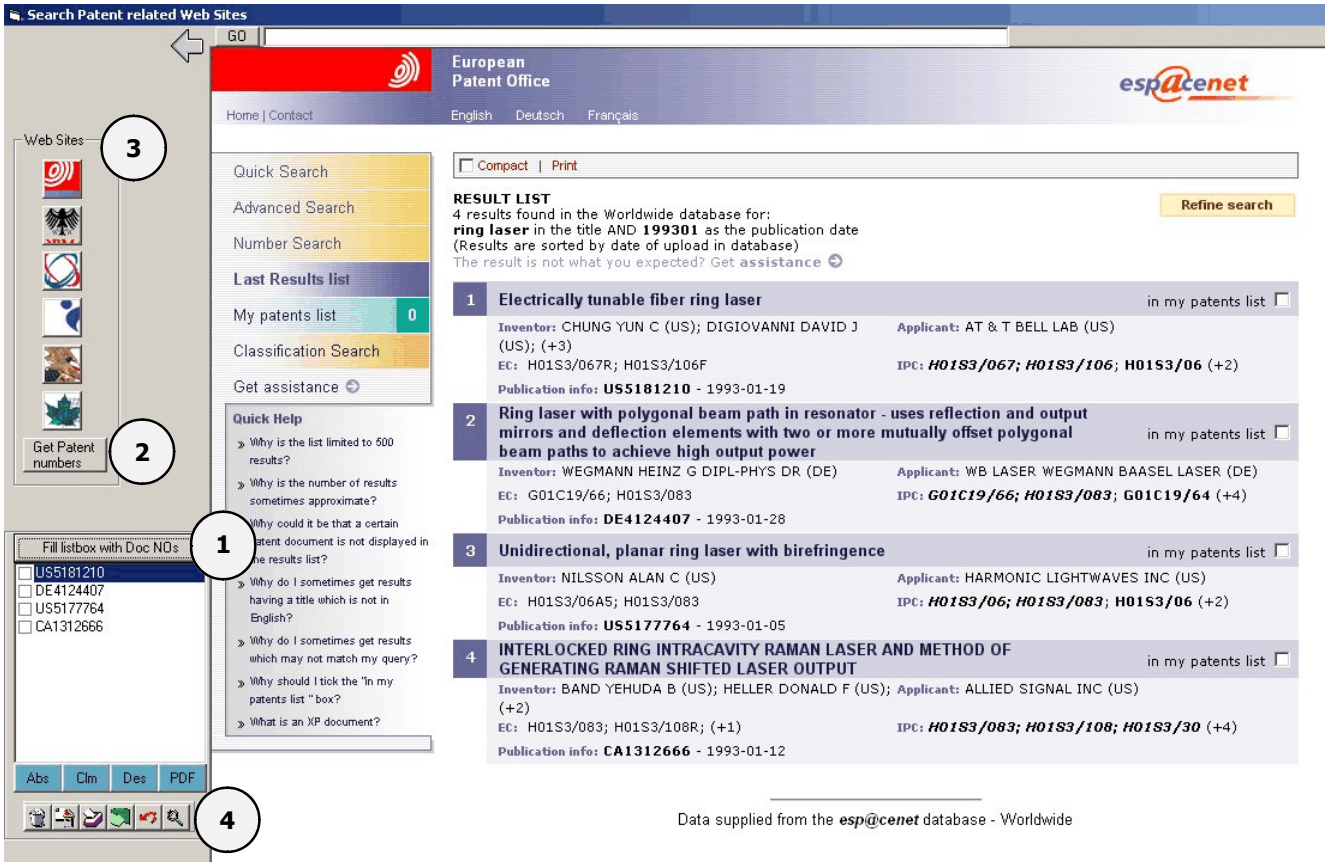
The program will then attempt to download the images and text for all the Patent numbers in the window. This can take some time depending on the number of documents and whether some of these are already found in your local database of files.

Once the download process is done, it is possible that some documents could not be downloaded. These will appear in a window "no documents found". You can copy these numbers and try other search engines if these documents are needed.



SearchWeb Tool

This tool is aimed at performing comprehensive searches with various web databases and rapidly transferring patent document numbers in the **Formatted Patent NOs** field of the **Download Interface**. One would perform a search, obtain numbers and then press the ***Get Patent numbers*** button to easily transfer them into the **Formatted Patent NOs** field of



the **Download Interface**. From there the download of patents can start.

1. By clicking the ***Fill listbox with Doc NOs*** button, the program will automatically fill in the patent numbers found in the right window into the lower left box.

2. The ***Get Patent numbers*** button will copy the patent numbers into the **Formatted Patent NOs** field of the main **Download Interface**. Make sure that the ***Work Folder Name*** field has a new entry to create a new *work folder*, or enter an existing *work folder* to add these patent documents to the *work folder*.

3. The Web site buttons will change the web site used to do the searching. The list of available search engines is Espacenet, Depatis, QWEB, Delphion, USPTO and the Canadian patent database.

4. You can view the different tabs associated with the documents found by clicking on the document and selecting one of the abstract, claims, description or PDF buttons. From here you also have access to different tools:


which include deleting all items in the list, erasing a single item, transferring the selected document to the PatentPleeze main screen when checked, check antecedents, verify claim dependency and highlighting potentially unclear expressions.

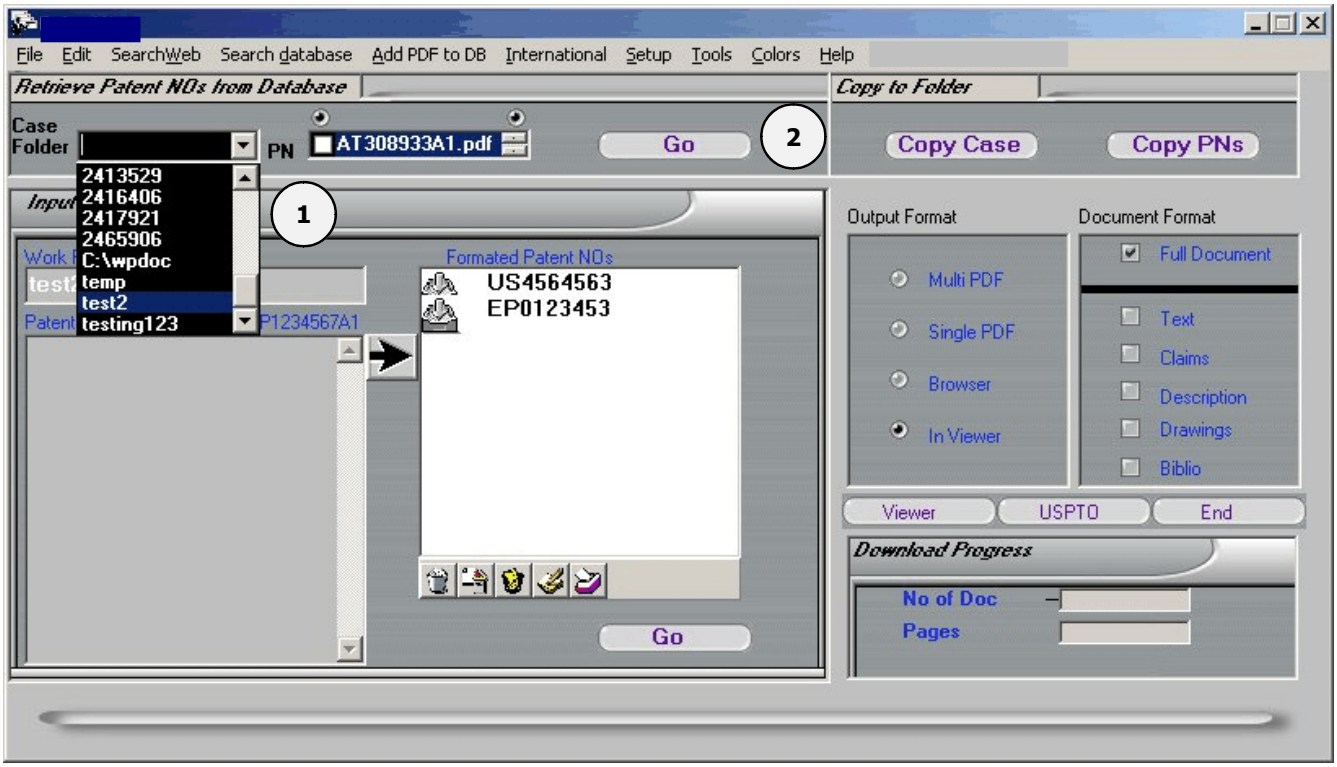
Download Interface - Retrieve Patent NOs from Database Section

Searching the Database of Downloaded Patents

1. The quickest and easiest way to access a *Work folder* that is in the database is to use the Case Folder drop-down menu.
2. Remember to select the desired Output/Document Format, and click the Go button.

In this screen, the user selects the case folder "test2" with the **Viewer** as the **Output Format**.

Note: The fields in the **Input Patent NOs** section should be empty, otherwise any documents that appear in the **Formatted Patent NOs** field will also be displayed. It is good practice to start from a fresh window by selection from the menu bar File => New.



Download Interface - Output Format and Document Format

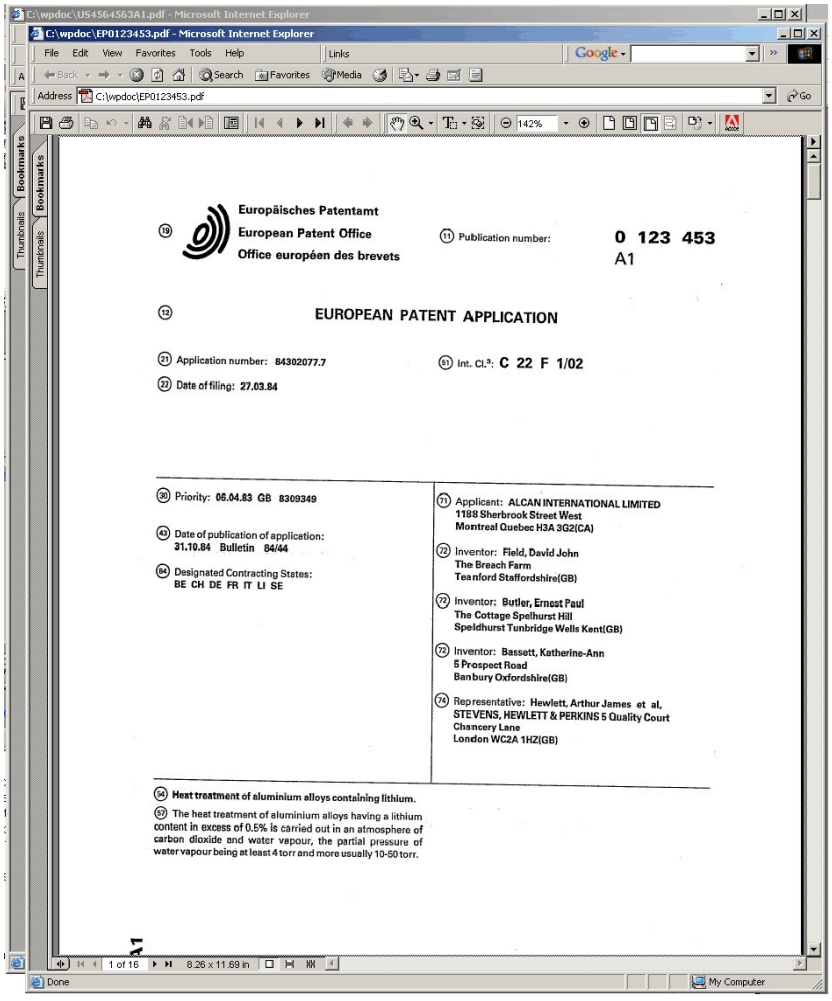
There are 4 different **Output Formats** to display the patent documents of a *work folder*:

1. **Multi PDF** - a new window appears for each document
2. **Single PDF** - a single PDF is created containing all of the patent documents
3. **Browser** - a frame set with the navigation panel on the left
4. **Viewer** - This format should be to exploit all of PatentPleeze's analytical tools, patent documents are displayed with full text in the left window and a PDF on the right window

Each **Output Format** has its pros and cons. The Multi PDF will open a window for each document hence it is easy to navigate from one window to the next, however if there is too many documents it can be difficult to find the proper window. The Single PDF format permits printing of all documents with a single command. The Browser format permits easy navigation by alternating text and images. The **Viewer** format is the most useful for it incorporates all of PatentPleeze's analytical tools by displaying text and images side by side.

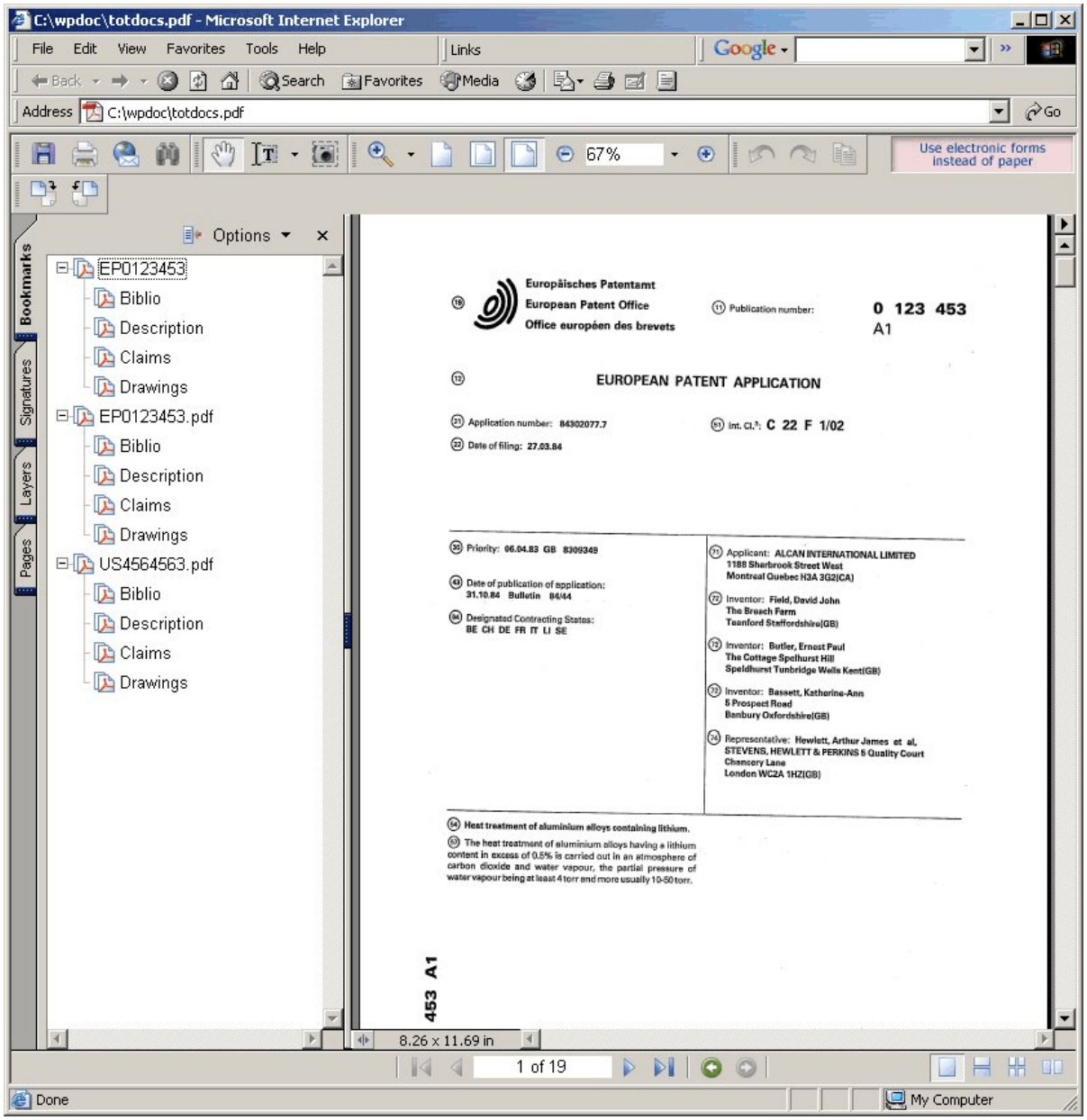
Multi PDF

A new window appears for each document



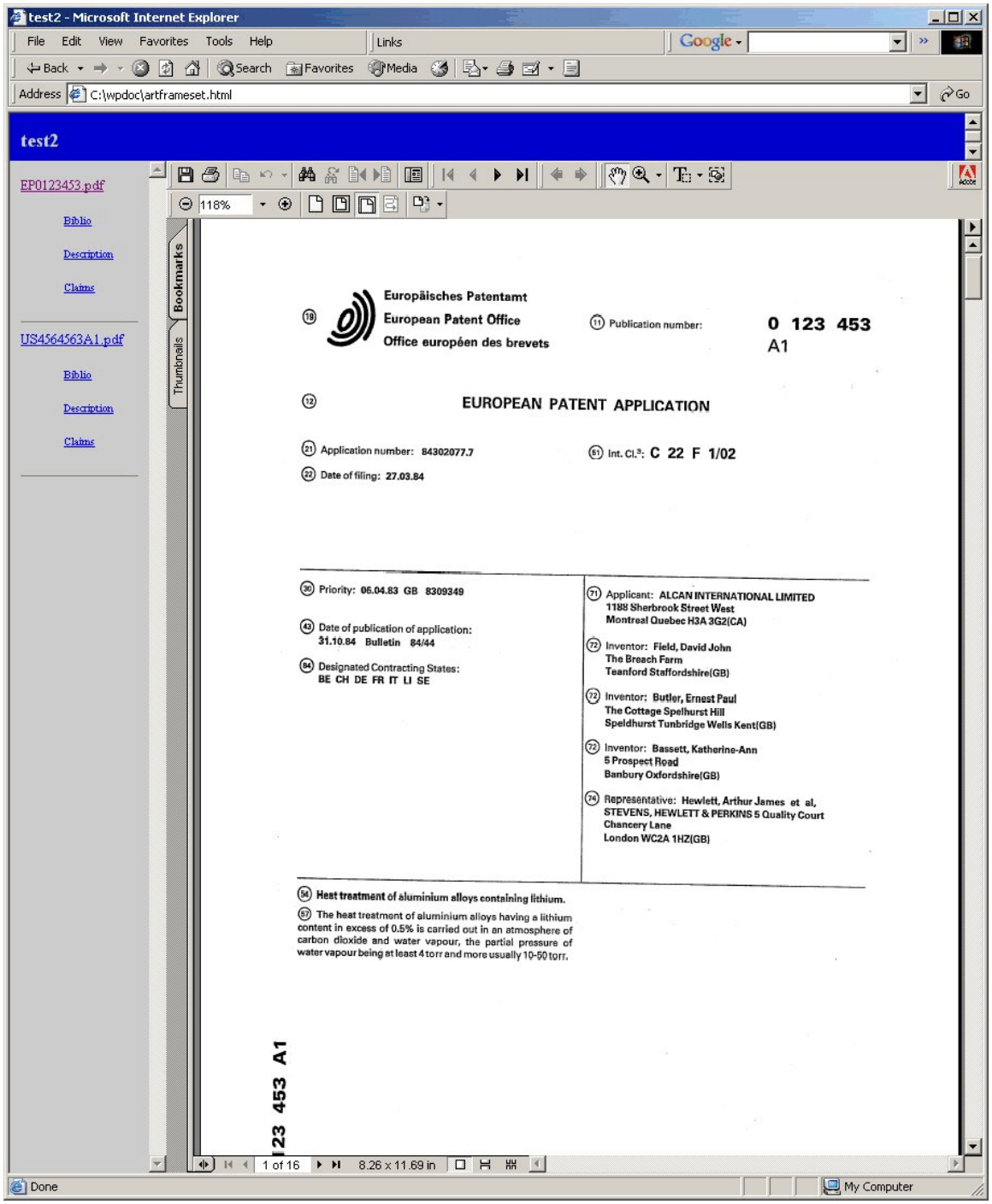
Single PDF

Documents are combined in one single PDF. You can click on the "Bookmarks" tab in order to view all the different documents in the PDF file.



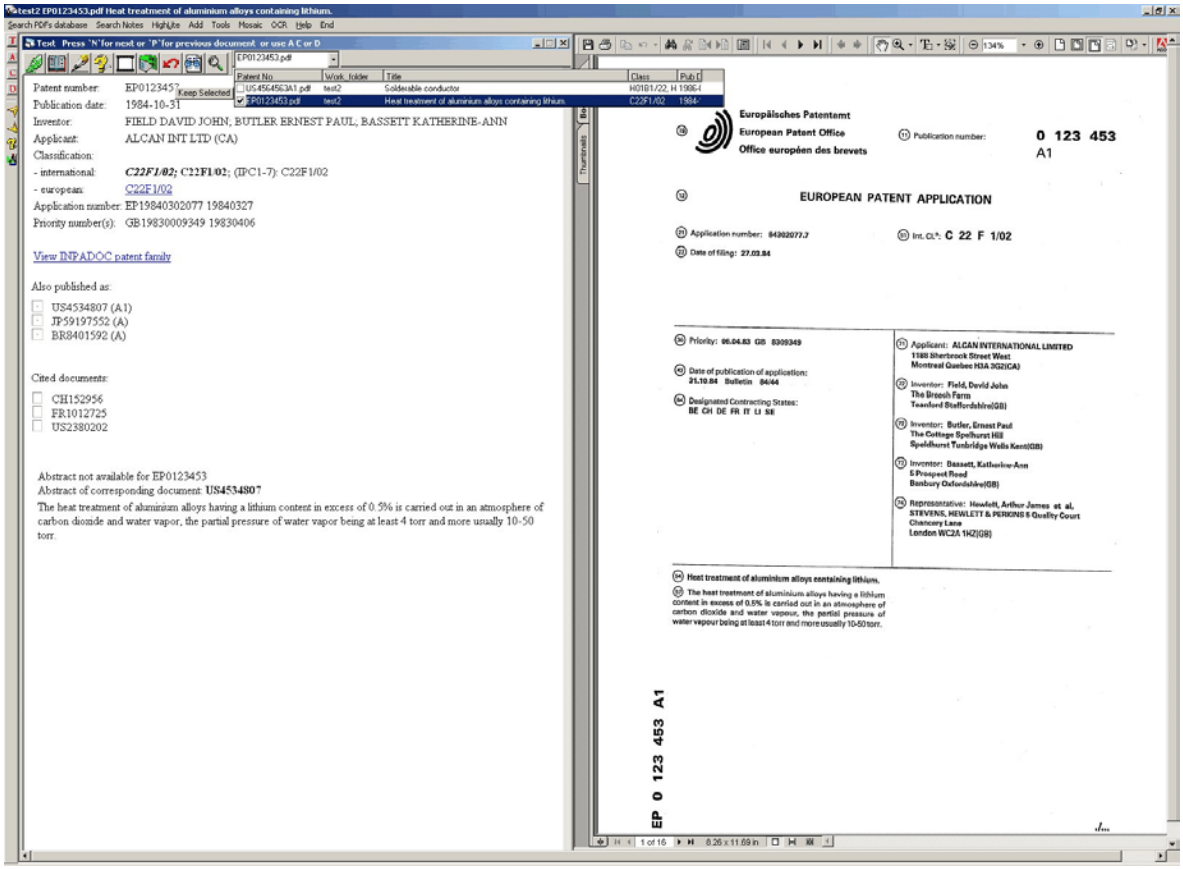
Browser

A frame set with the navigation panel on the left.

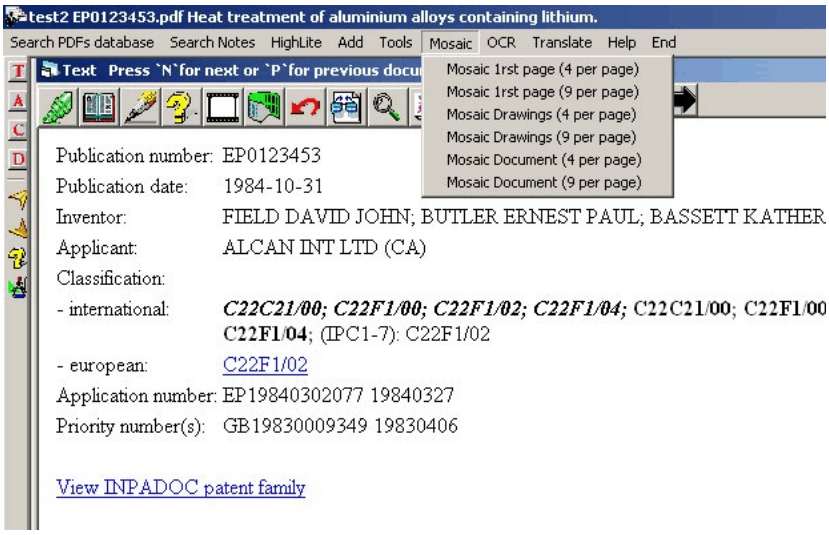


Viewer

Displays text and images side by side. Gives access to all of **PatentPleeze**'s analytical tools.



If you wish to view more than one document at the same time, you can use the **Mosaic** tool found in the toolbar.



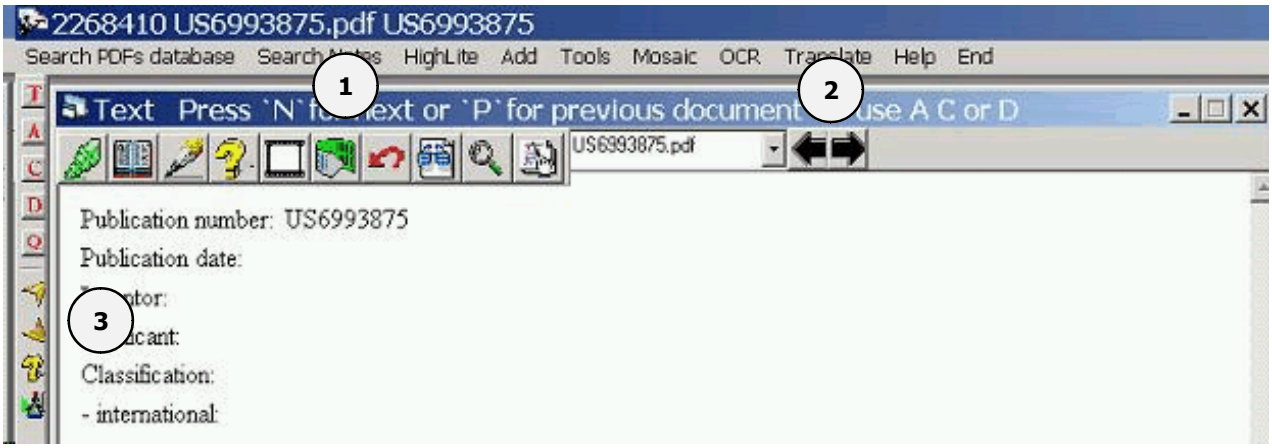
Viewer Interface - Tools for Analysis

There are several tools in the **Viewer Output Format** provided to help in analyzing patents. By default you get a two-window display with text on the left and images on the right. You can also choose to have two windows of images or a single larger window. It is possible to adjust the respective size of each window.

The **Viewer** integrates the following text tools which will be explained in detail, in the top toolbar(1):

- Highlight
- Index
- Notes
- Help
- Double Image
- Check Antecedents
- Claim Dependency
- Compare two Patents
- Highlighting of potentially indefinite expressions, and
- Searching for words found in the dependent claims

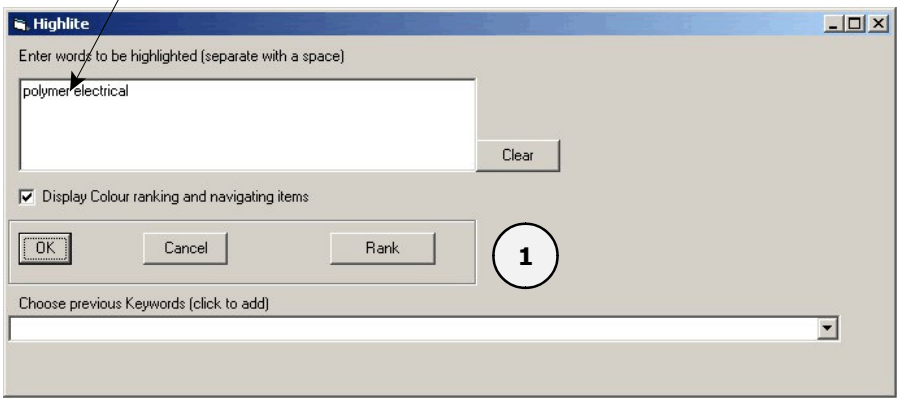
You can scroll through the different documents by using the arrows or the drop down menu (2). The **Viewer** also includes icons on the left toolbar to toggle between Full Text, Abstract, Claims, Disclosure (3). You can also increase or decrease the font size.



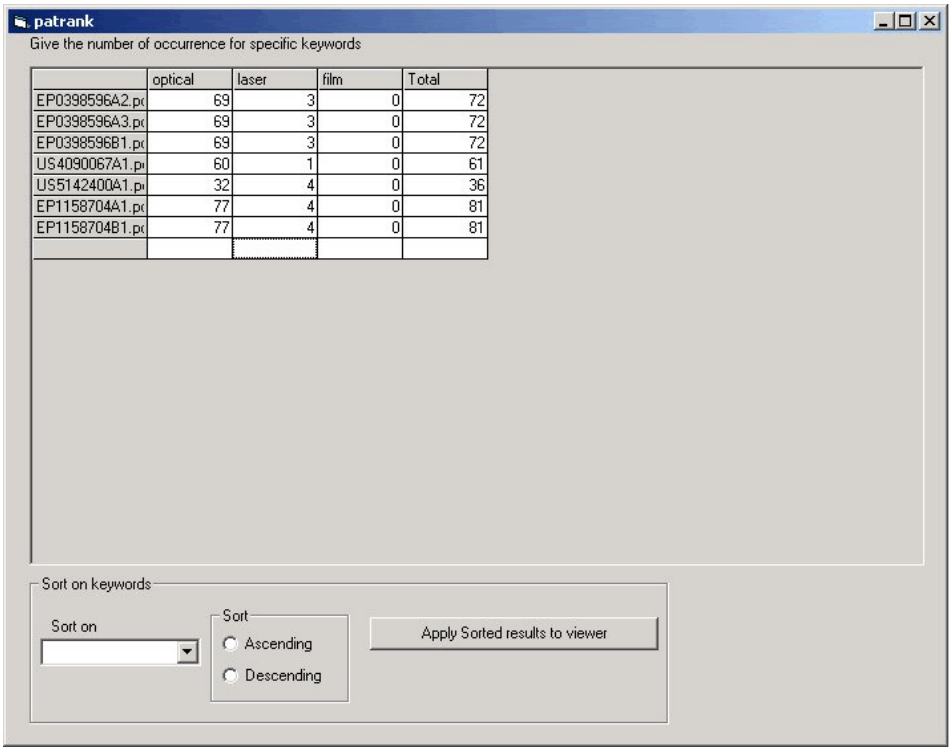
Top Toolbar Tools

Highlighting Different Words 

Enter words to be highlighted

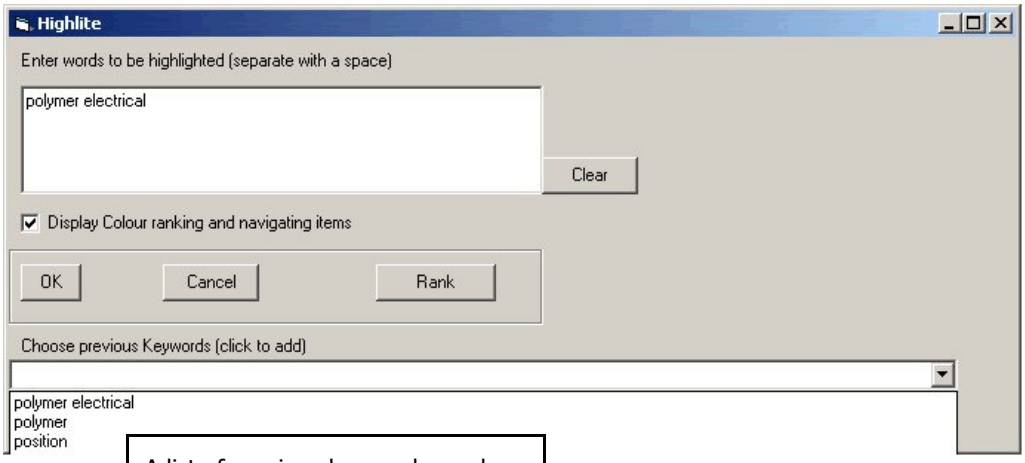


By pressing "Rank" (1) you will obtain a table indicating how many keywords were found in each document.



From there you can sort any keywords (or total) and apply that sorted list to the **Viewer**

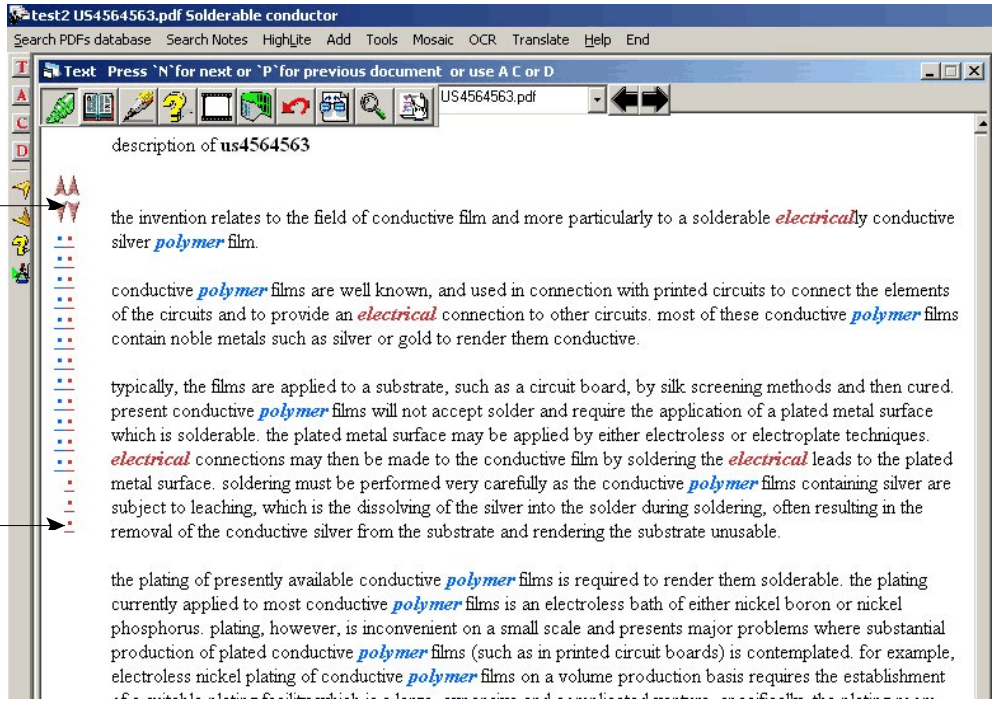
If you check this box you will obtain a frame in which you can navigate to each specific keyword in the document.



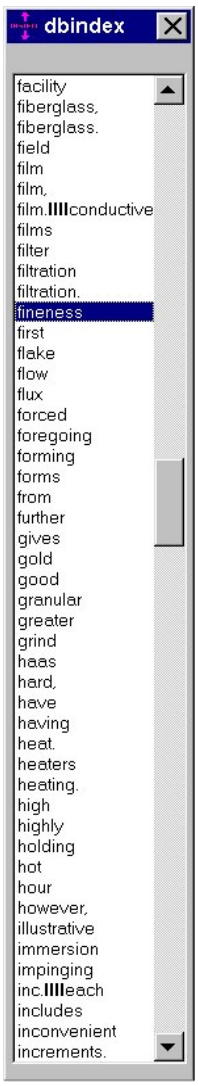
A list of previous keywords used

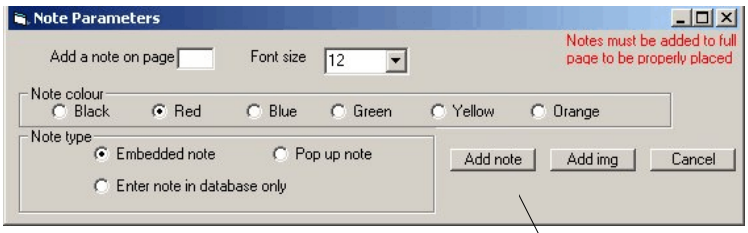
These are links to specific occurrence of the words "polymer" or "electrical"

This will move up and down in the text to various occurrences of the words "polymer" or "electrical"



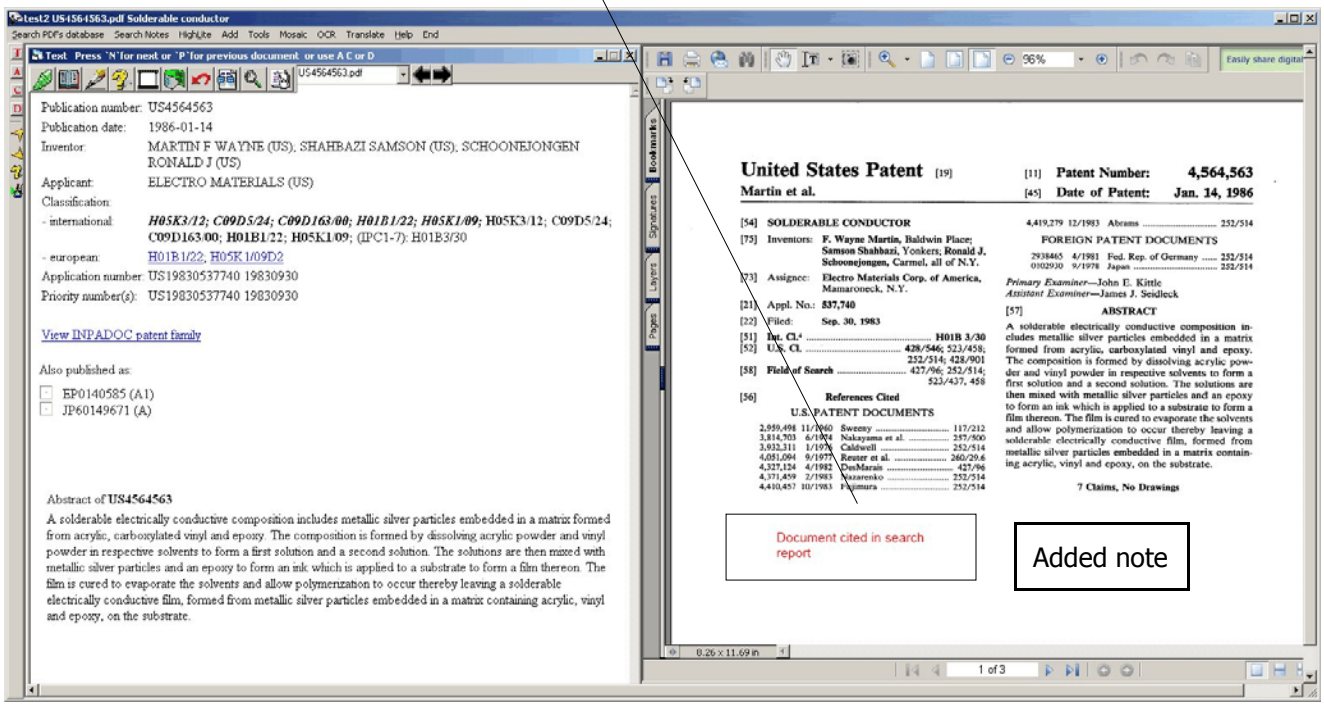
This is an example of an index of the description of a patent. To navigate to a particular word just click on it. To navigate to the next occurrence keep clicking.





Adding Notes 

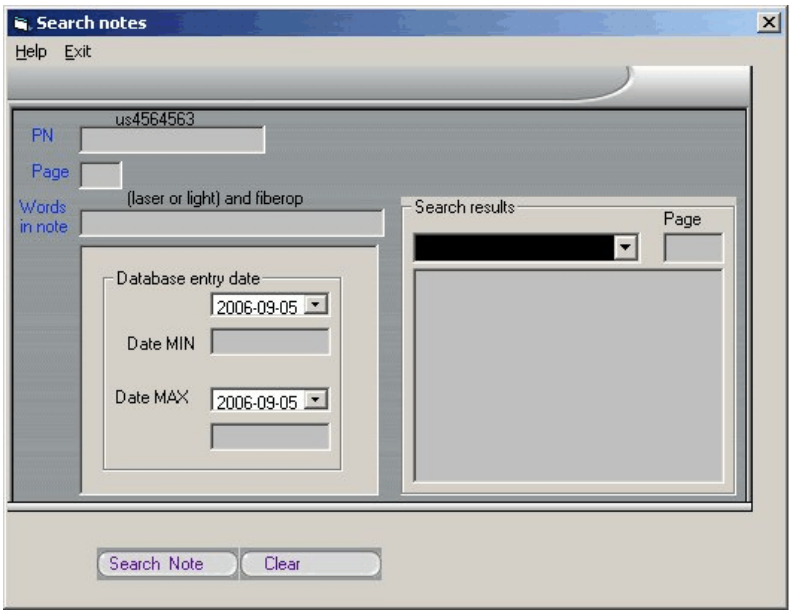
You can add notes to a PDF document. To do so you have to provide the page number and enter your note in the **Formatted Patent NOs** field that has appeared. Notes will only be correctly positioned when a full page is being displayed. You can also add an image instead of a note or the two in combination. You can also select the colour and type of note you want to use.



notes can be searched using the search notes menu item in the **Viewer**'s menu bar.

Doc Display

You have the option when using the arrows to display documents to only view unique documents. By default you are displaying all documents in sequence but if you choose the option <unique> you will only view a unique document for a particular priority date (if there is an EP or US document with that priority date it will be that document that will be displayed.



Help 

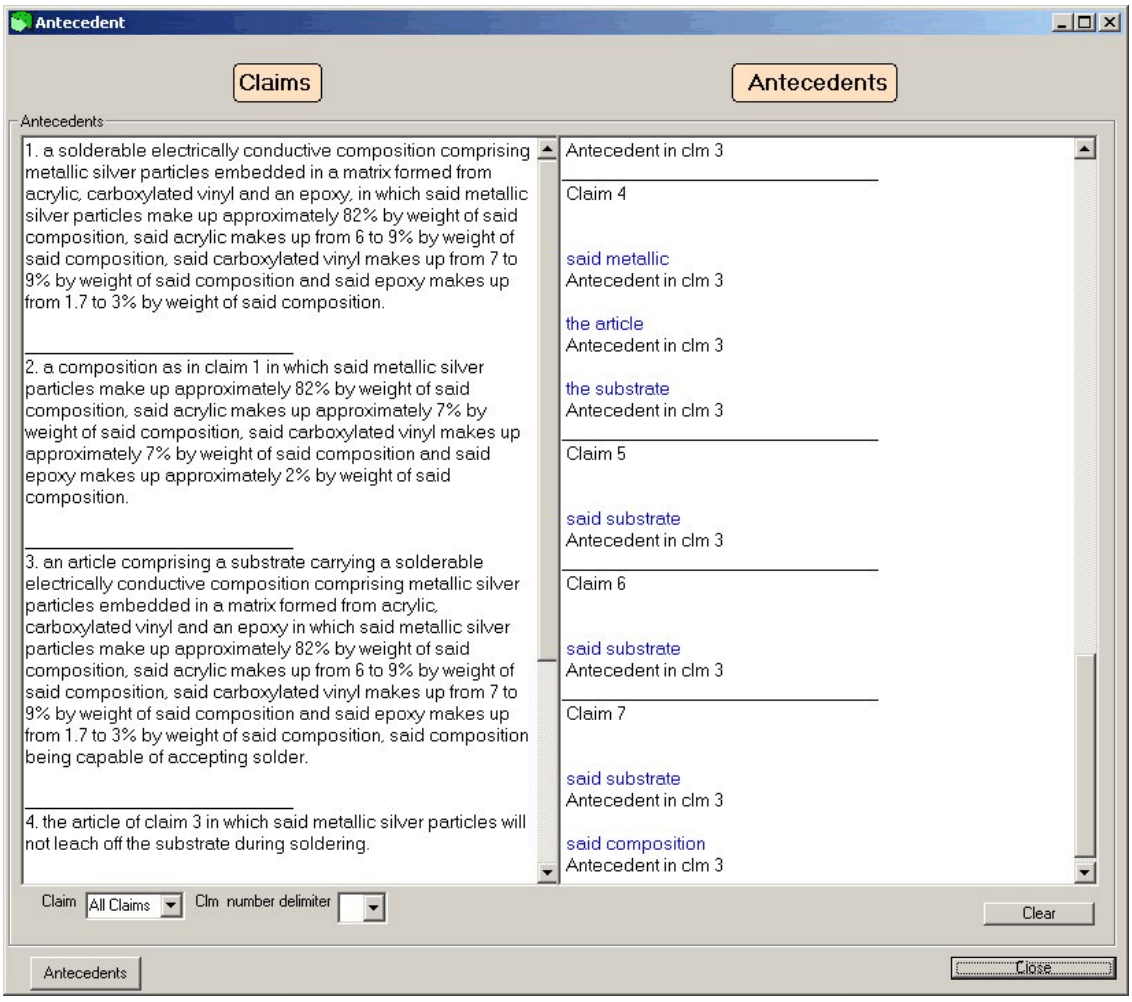
Opens a window with a short explanation of the tools and their use.

Double Image 

Creates a second viewer window to the left part of the screen.

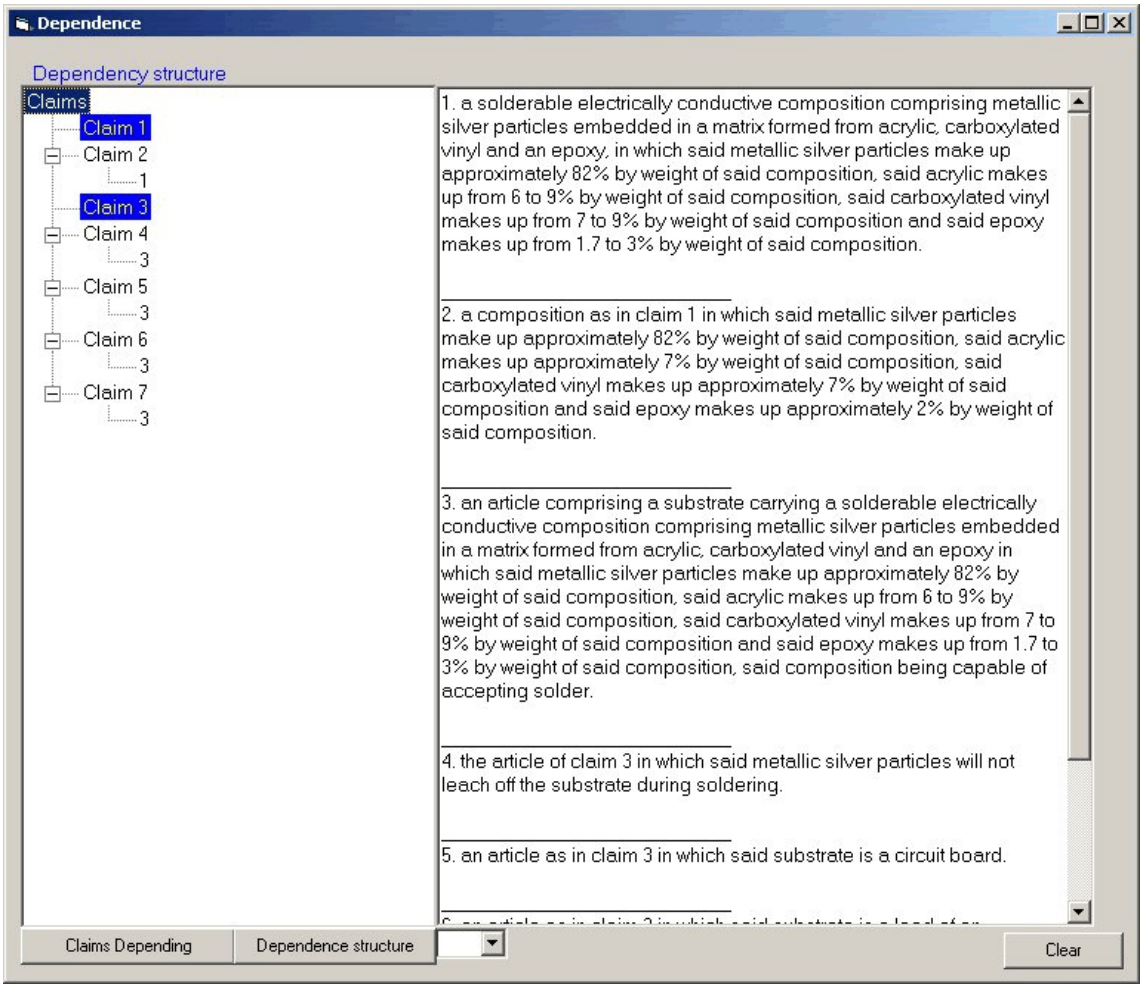
Check Antecedents 

Will open a window where you can verify the antecedents for the claims which appeared in the **Viewer**. You can also cut and paste other claims in the left window.



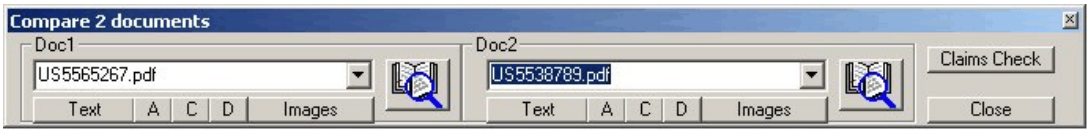
Claim Dependency 

The Claim Dependency tool is used to verify the claim dependencies. You can also paste different claims in the right window.

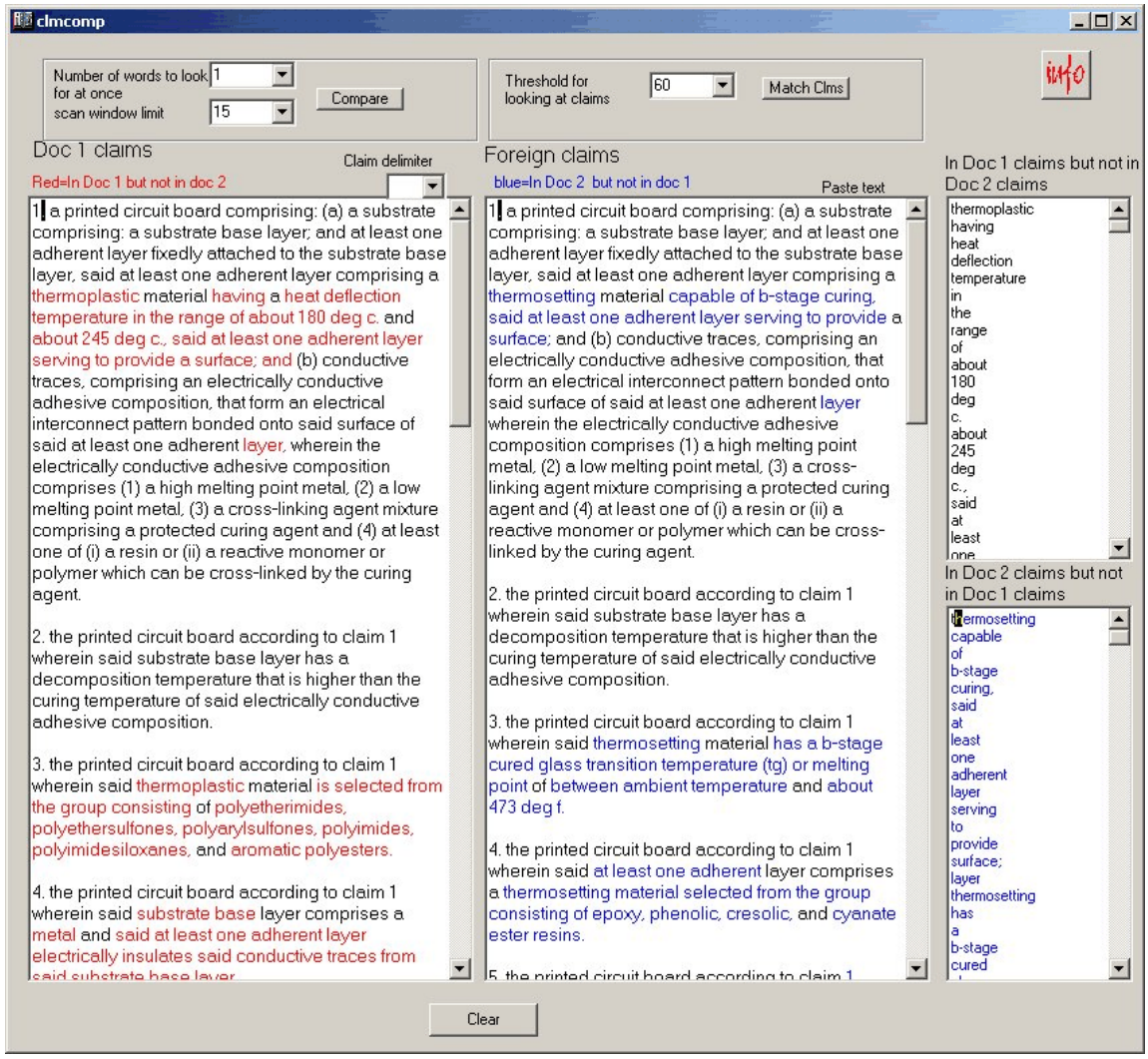


Compare two Patents 

You can compare two documents to see what the differences are with the two. This can be a useful tool to compare claims of different family members. The first window is used to select the documents and view the different tabs. Pressing the claims check button will compare the claims of the two selected documents.



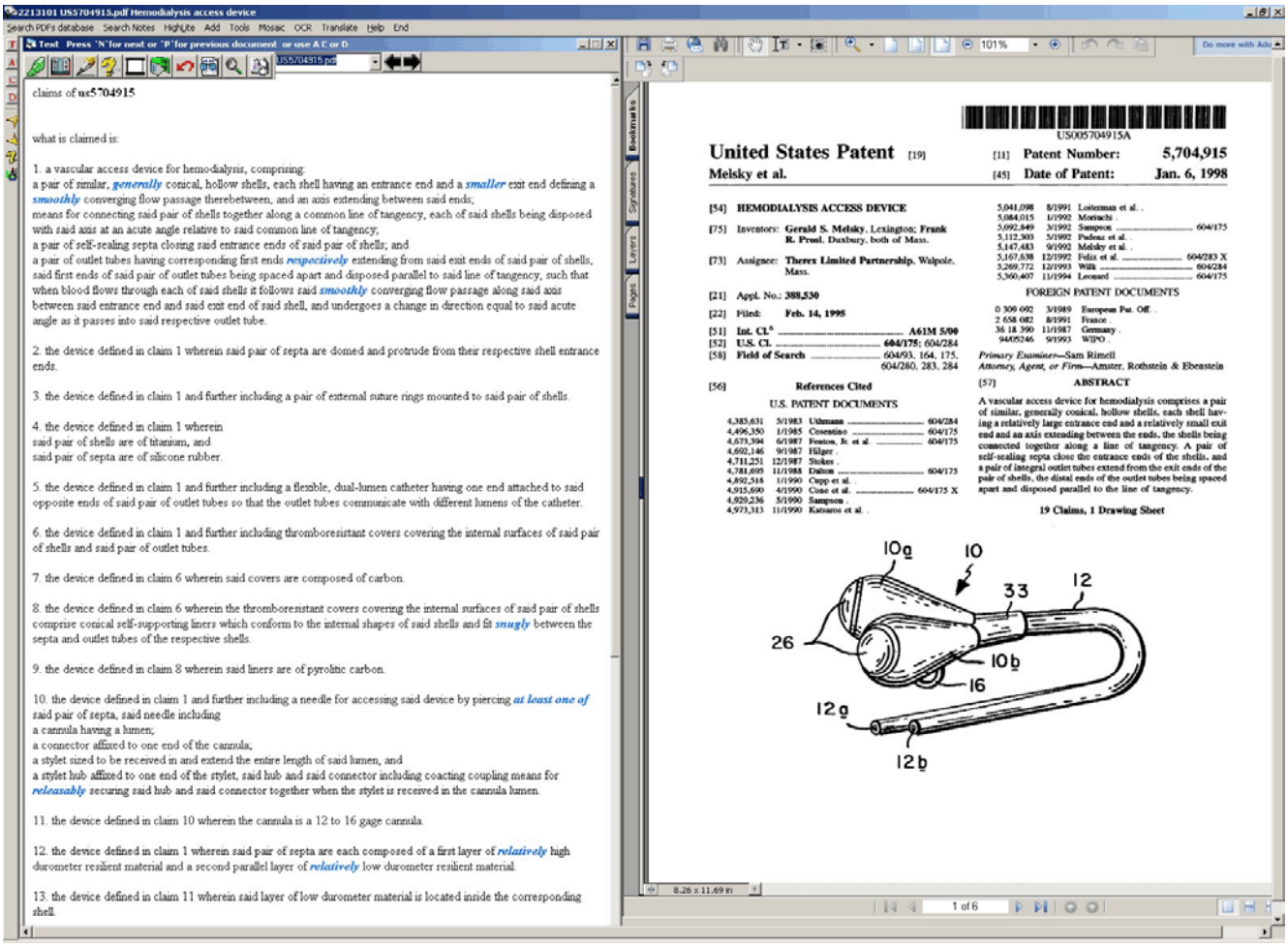
You can select different threshold values for the comparison algorithm. The coloured text in each window are the words not appearing in the other set of claims.



Highlighting of potentially indefinite expressions

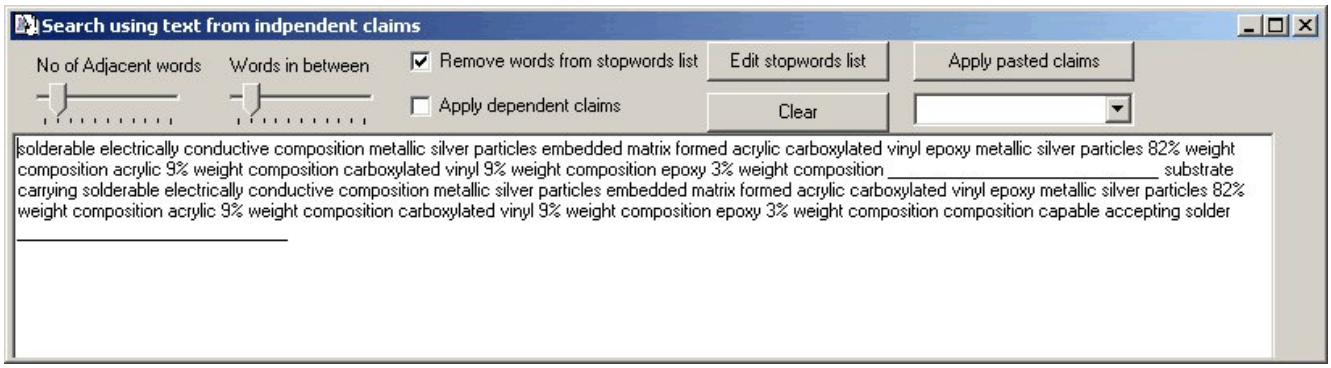
You can easily find potentially indefinite expressions in the document appearing in the left window by pressing the magnifying glass button.

Potentially indefinite words are highlighted in the left window. The list of potentially indefinite expressions used by this tool can be modified by clicking the add indefinite words in list option under the add menu found in the **Viewer**'s menu bar.



Using one patent as a reference, (the one that is displayed when pressing the icon) it will highlight words from the independent claims of the reference when viewing other patent documents

This tool will highlight the words found in the claims in the document viewed in the **Viewer**. You can add the



stopwords found in the claims or add the dependent claims also. The list of stopwords can be edited.

Left Toolbar Tools

Pressing on the different letters on the left menu bar will show the following:

Full Text Abstract Claims Disclosure Qweb family

You can also change the font size:

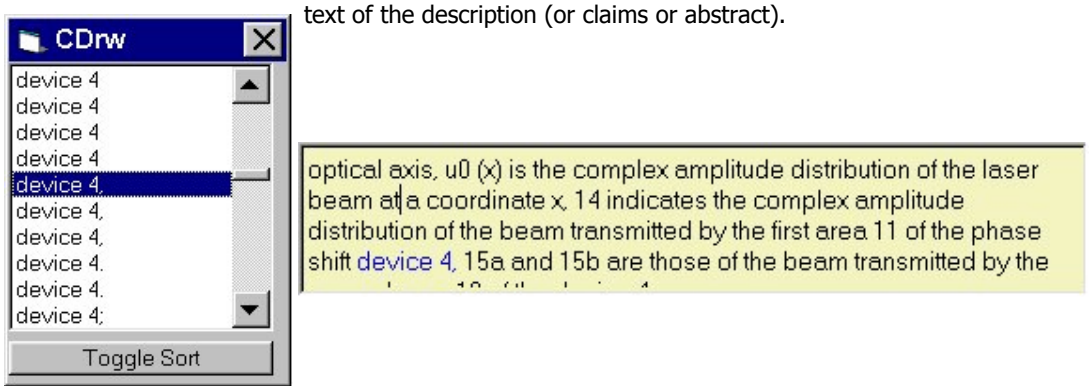
Increase font size

Decrease font size

Help opens a window with a short explanation of the tools and their use.

Figure numbering

The figure numbering tool can help in determining if the right reference character is used in the description. It will open a window with all the numbers appearing in the text. This window will stay on top of any other window. If you need details for a particular number appearing on the drawing you press on it and you get the context of that number in the text of the description (or claims or abstract).

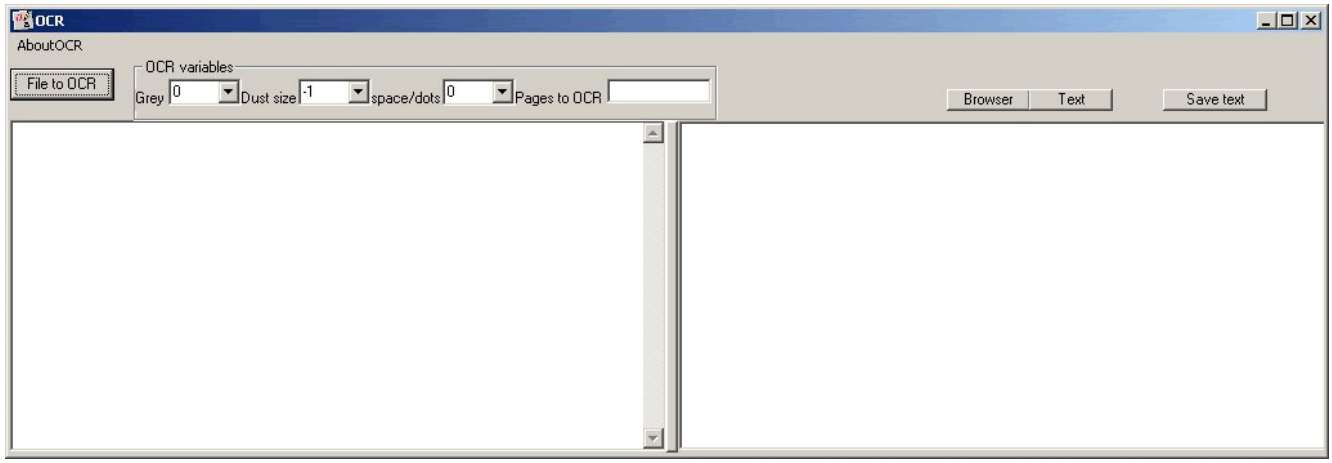


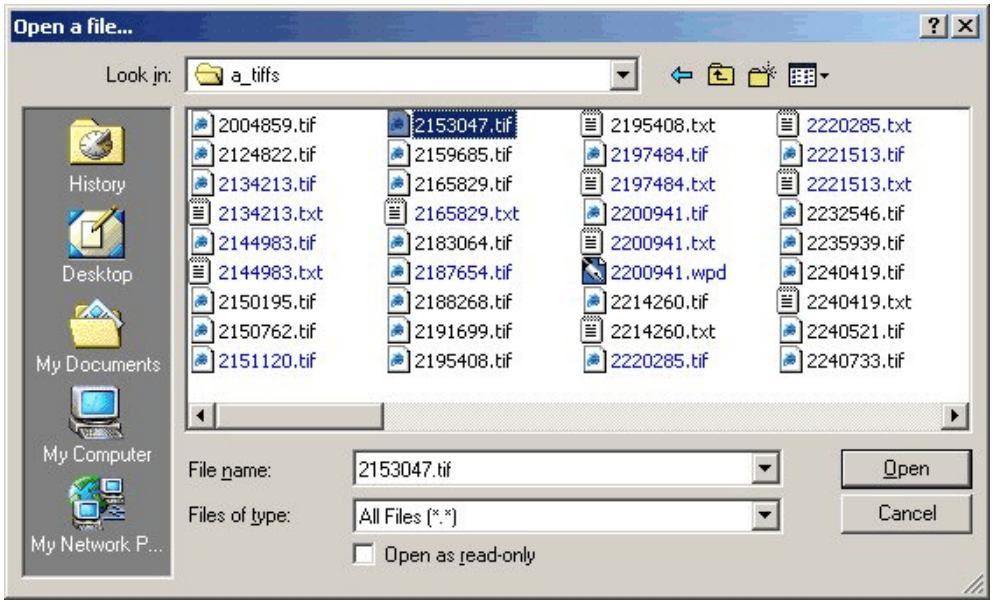
OCR

PatentPleeze integrates an OCR tool which can be used instead of a web based OCR such as DocMorph. You can access

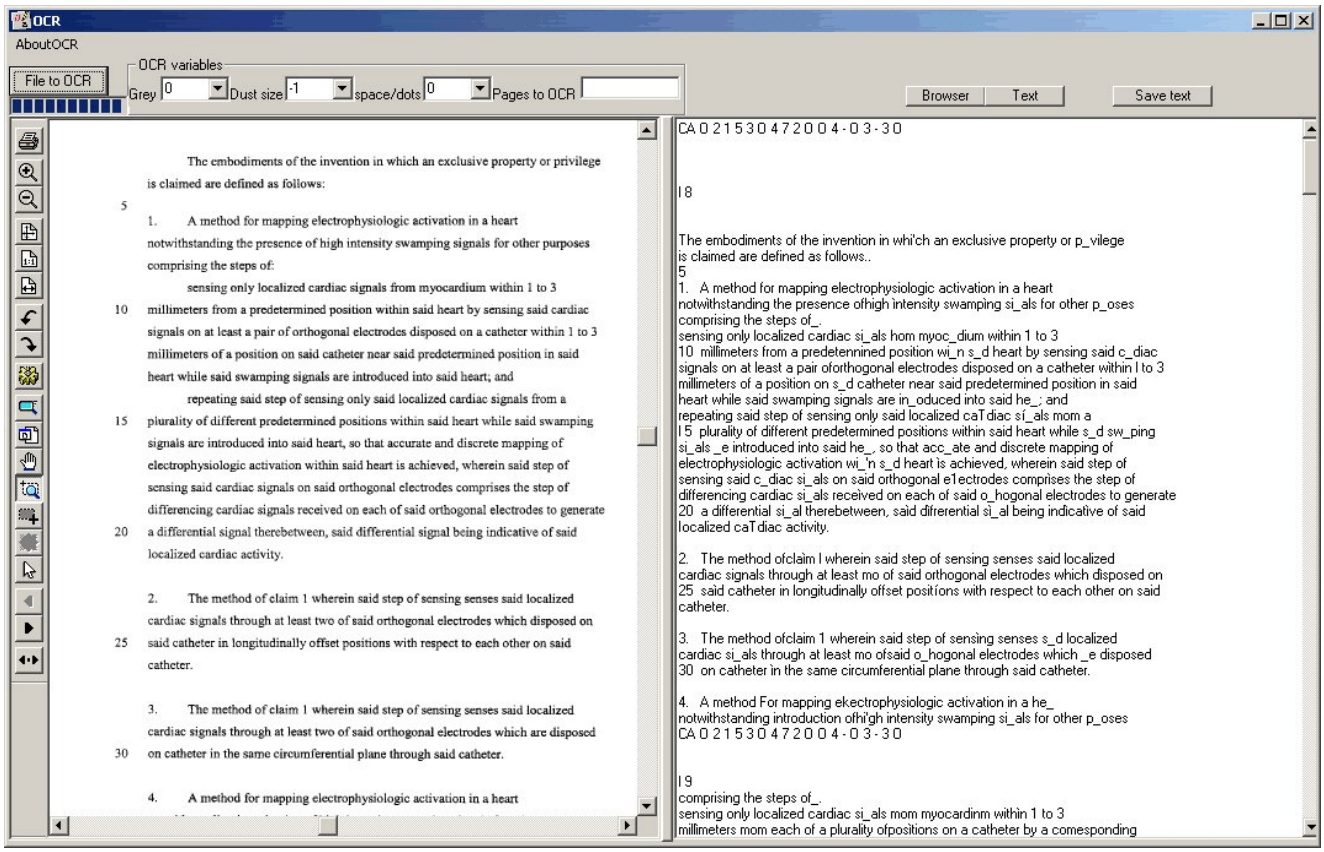
the OCR tool through the Tools menu in the main screen's toolbar.

From there you press the File to OCR button and select the file you wish to convert to text using the OCR.



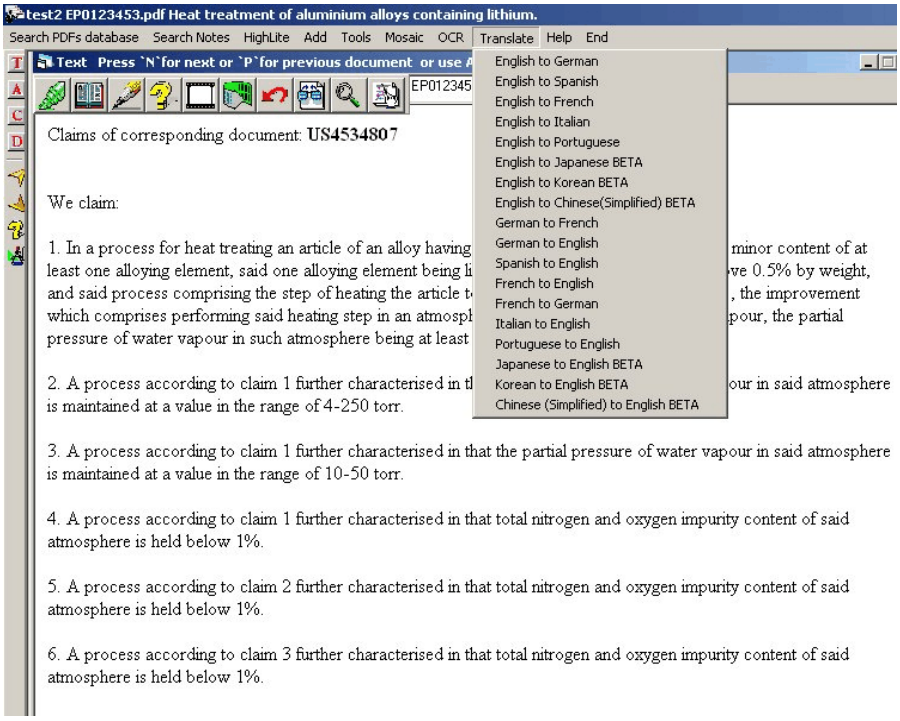


A progress bar will show the conversion progress. The conversion can take some time depending on the size of the file to convert. Once the OCR is done, the right window will contain the text version of the file.

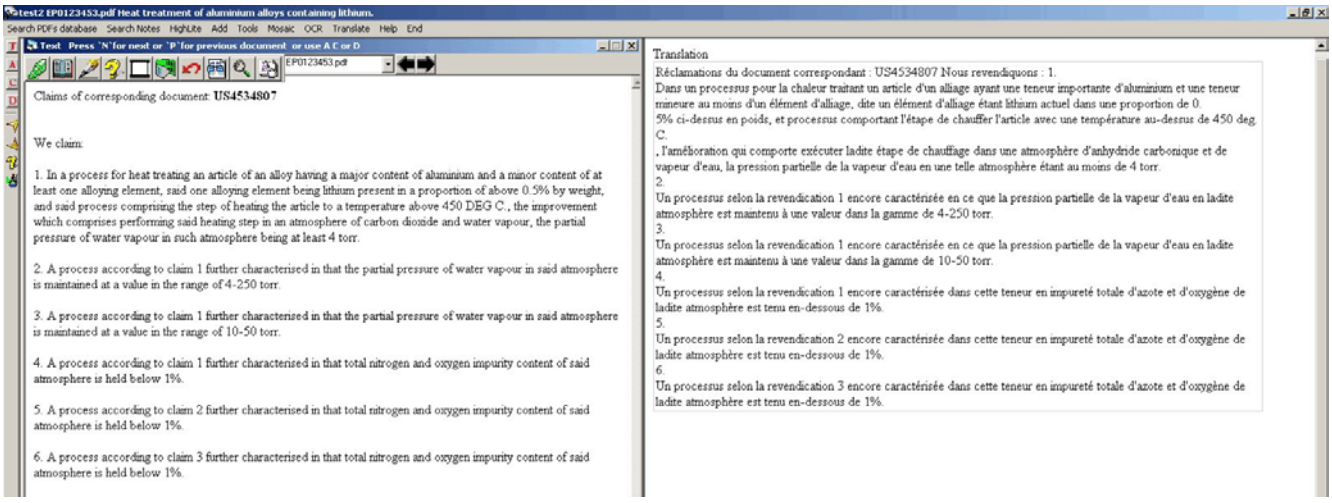


Translate

You can translate the text found in the left window of the **Viewer** by using the translate tool found in the **Viewer**'s toolbar.

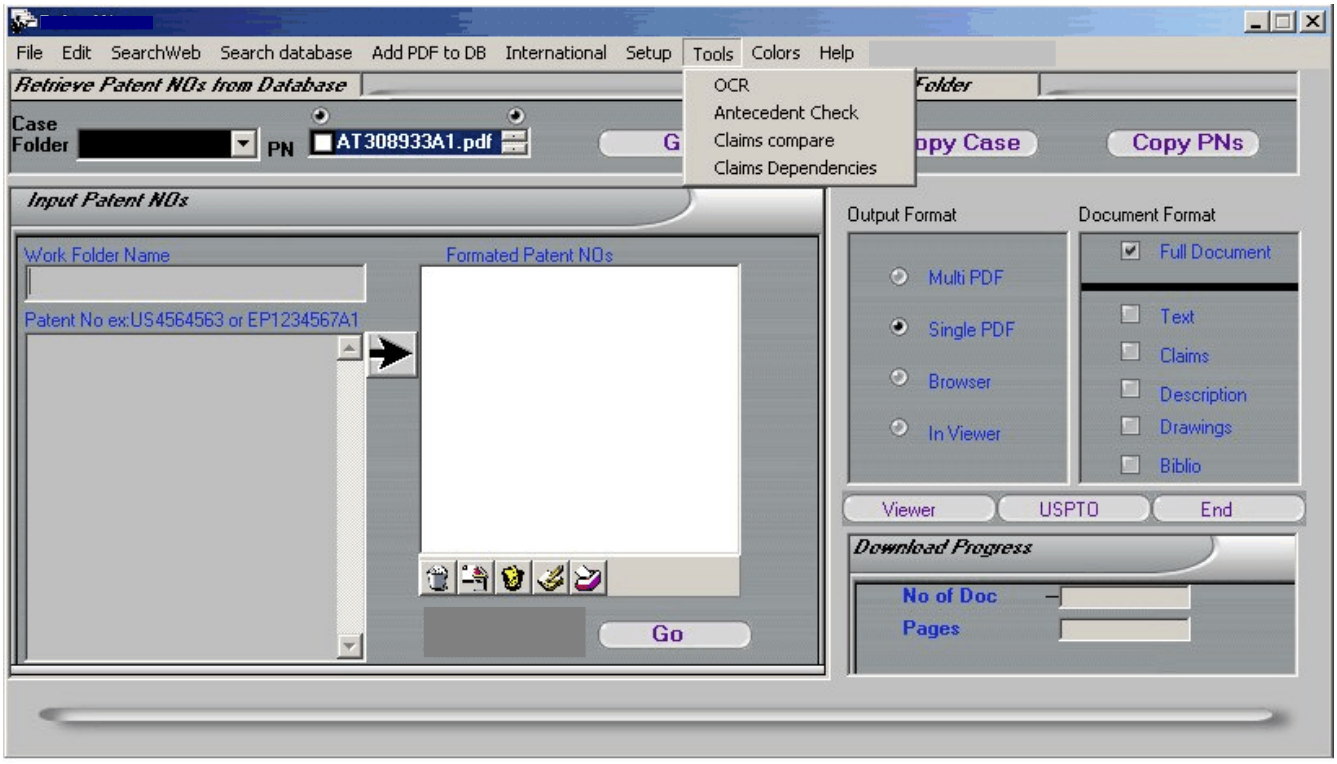


For example, selecting English to French for the set of claims will give the following result:



Tools on the main Download Interface

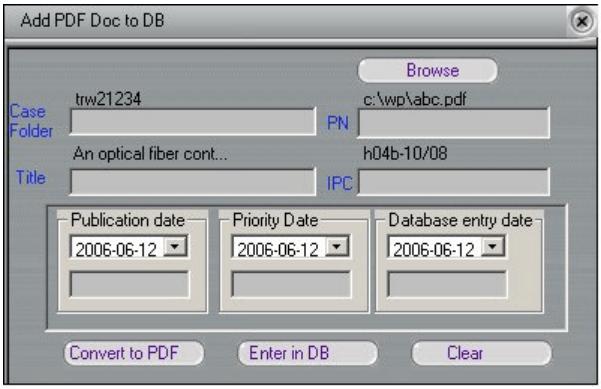
The Tools found in the **Viewer** Interface can also be accessed at any time on the main **Download Interface** screen.



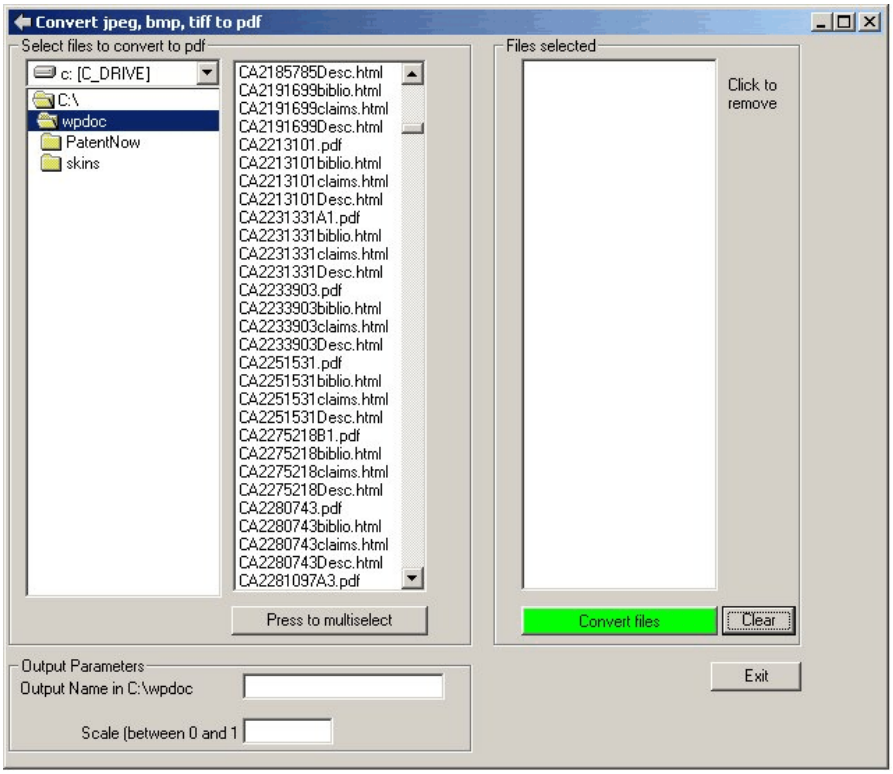
Add PDF Document to Database

It is possible to add non-patent PDF documents manually to a *work folder* in the database. This is useful to file foreign prosecution (USPTO PAIR and EPOLINE) documents and non-patent literature (from a web search) in the corresponding work folder. This tool is accessed from the main **Download Interface** screen or from the **Viewer** menu bar.

To add the document, it is necessary to fill the various fields and to specify the location of the specific document on the computer (the browse button can be used), once fields are filled you have to press the "enter in DB" button.

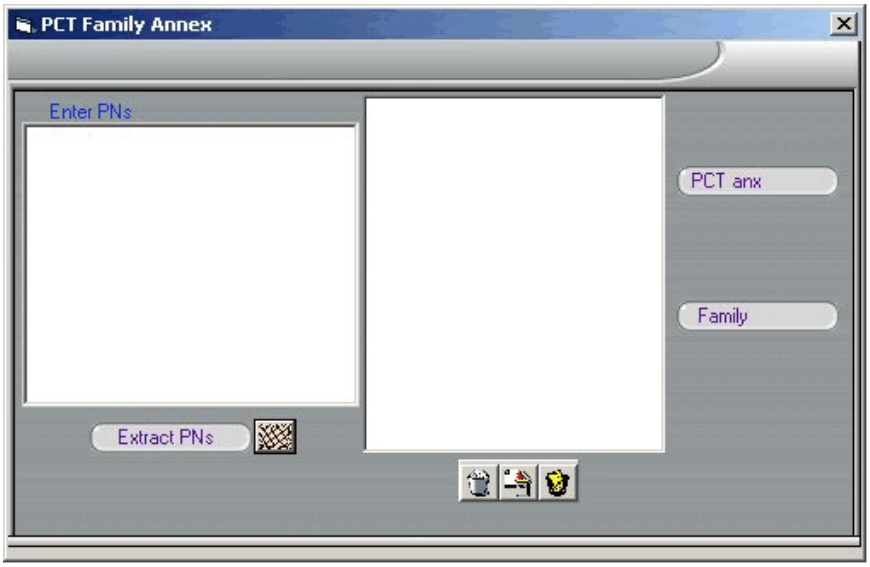


The *Convert to PDF* function is to convert file other types (TIFF, JPEG and BMP) to PDF. To do so you have to select which documents to convert (you can select multiple documents). These documents will be converted into one PDF. You can experiment with the scale to obtain a correct final document. You also have to provide an output name for your PDF document. The PDF document will be placed in the same directory as the database being used.

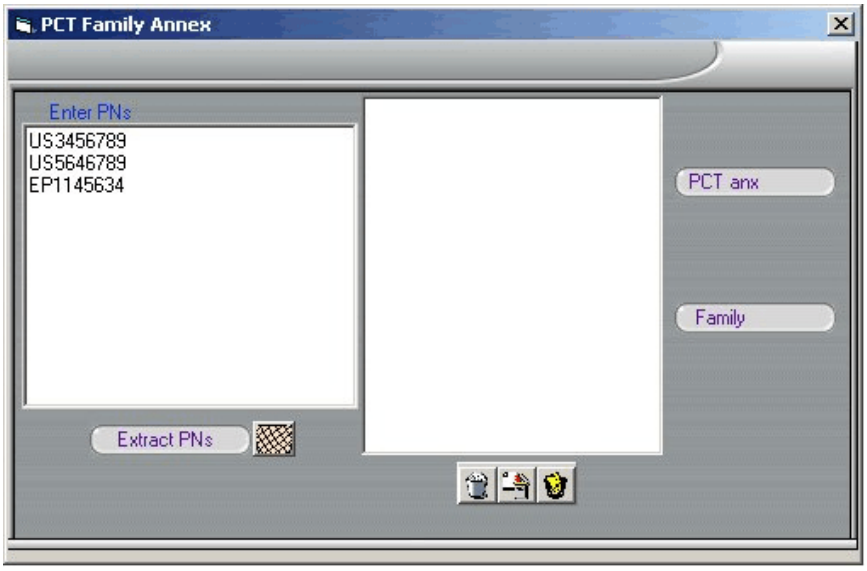


PCT Annex

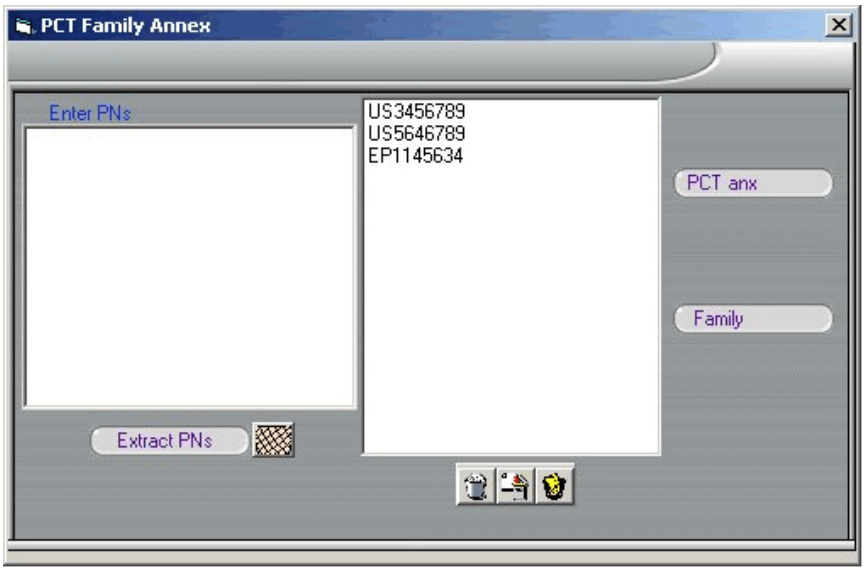
PCT Annex is used to either obtain a Formatted family list which can be equivalent to the ones used in an PCT search report, or to simply obtain family members of specific applications.



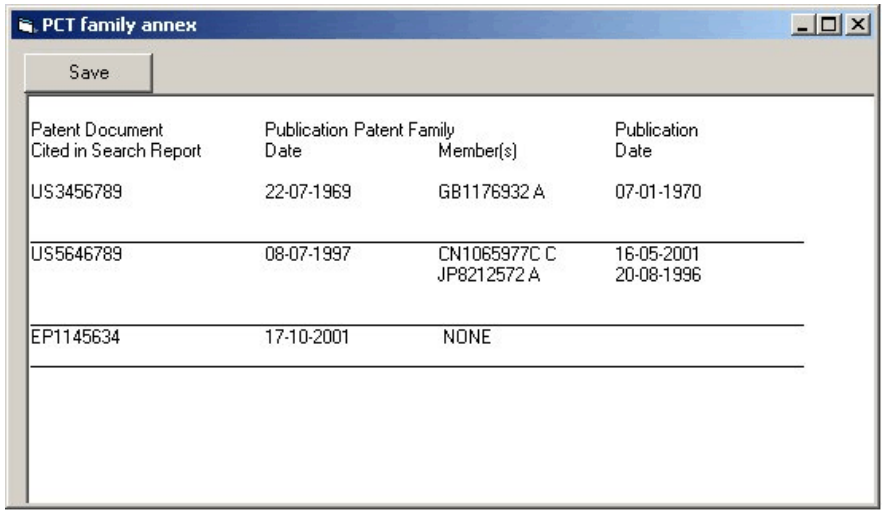
You first need to type in the application numbers in the left window under "Enter PNs".



You then click on the Extract PNs button which will copy the numbers in the right window.



Clicking the PCT anx button will generate a formatted PCT family annex, similar to the ones found in PCT search reports.

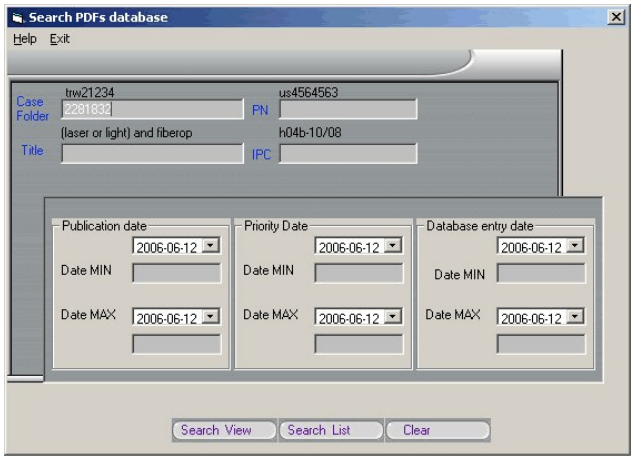


Patent Document Cited in Search Report	Publication Date	Patent Family Member(s)	Publication Date
US3456789	22-07-1969	GB1176932 A	07-01-1970
US5646789	08-07-1997	CN1065977C C JP8212572 A	16-05-2001 20-08-1996
EP1145634	17-10-2001	NONE	

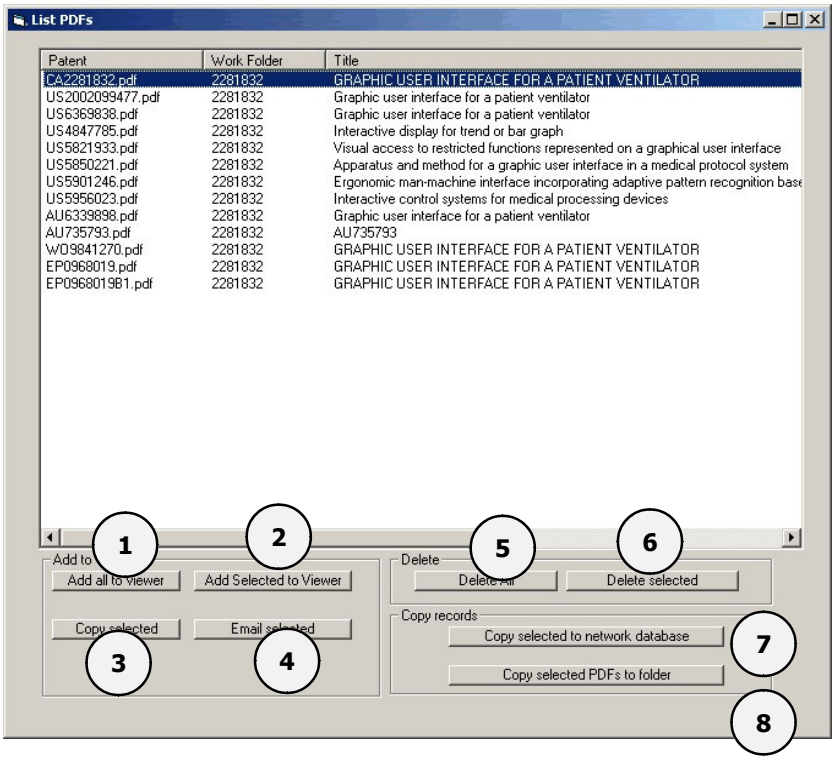
Advance Features

Searching the Database of Downloaded Patents

A second way of retrieving files in the database is by filling one or more search fields in the search database window found in the toolbar of the main screen. Truncated entries are permitted. You can either select "search view" which will immediately transfer results to the **Viewer** or select "search list" where you will obtain a list of patents with titles from which you can select to send to the **Viewer** or delete from the database.



The list comprises various fields including: patent, *work folder*, title, Class, publication date, entry date, and number of pages (use the scroll bar to reach some of the fields). The list can be sorted by pressing the header at the top of each fie ld.

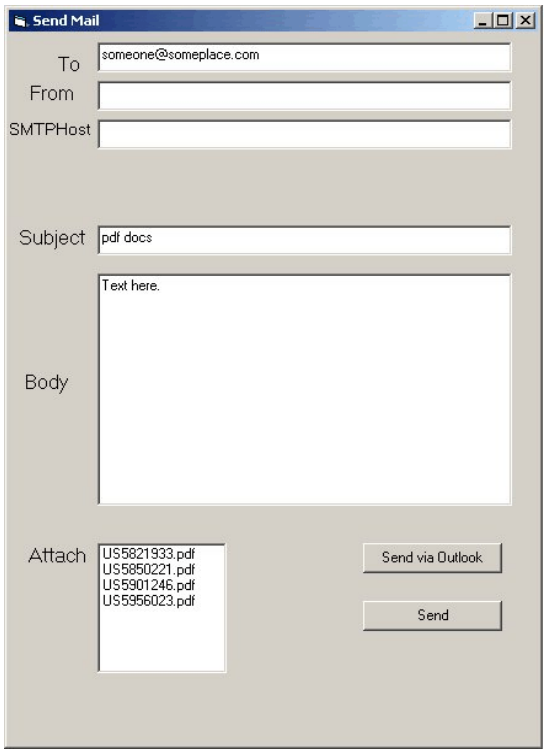


1. Add to **Viewer**: adds all the displayed patents to the **Viewer**'s drop down list.

2. Add selected to **Viewer**: only adds the selected patents to the **Viewer**'s drop down list.

3. Copy selected: copies the selected patent numbers to the clipboard.

4. Email selected: lets you email the selected PDFs to a specific email address.



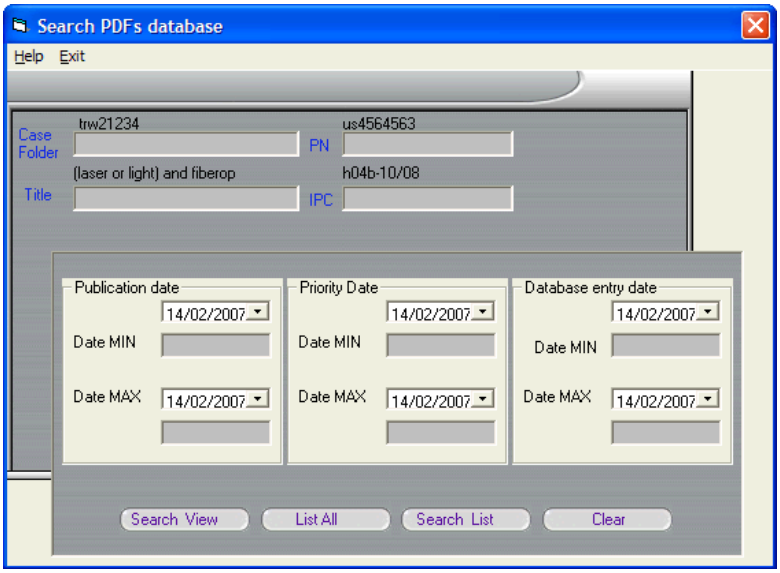
5. Delete All: deletes all the displayed patents from the folder.

6. Delete selected: deletes the selected patents from the folder.

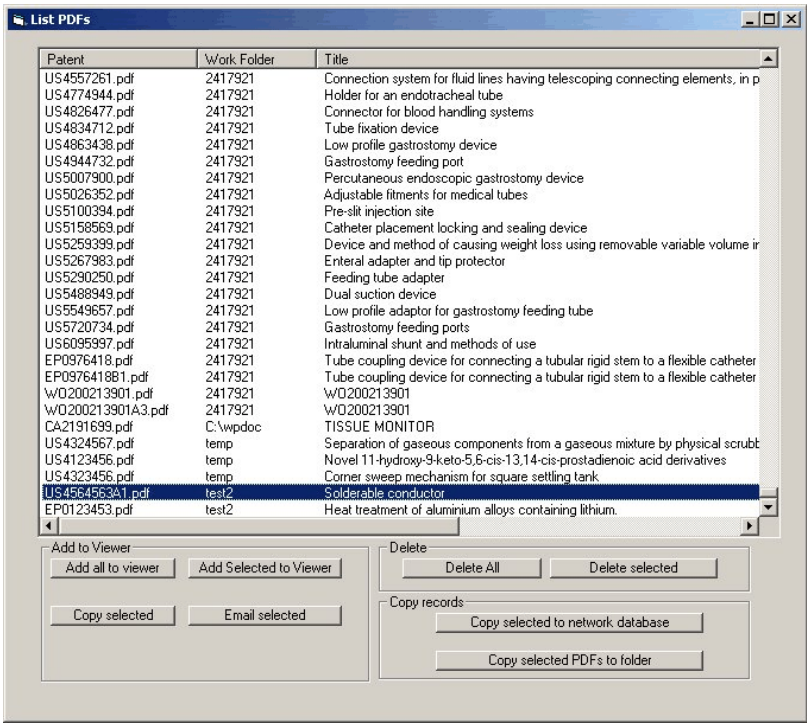
7. Copy selected to network database: copies the selected patents to the previously specified network folder.

8. Copy selected PDFs to folder: copies the selected patents to a folder of your choice. This can also be accomplished using the **Copy to Folder** options found on the main screen.

You can also retrieve patents by typing a star in the patent number search field or by pressing the button <list all>.



This will list all the patents in the database. Pressing the **Work Folder** field will sort all the patents by specific folder making it easy to search through the downloaded patents.



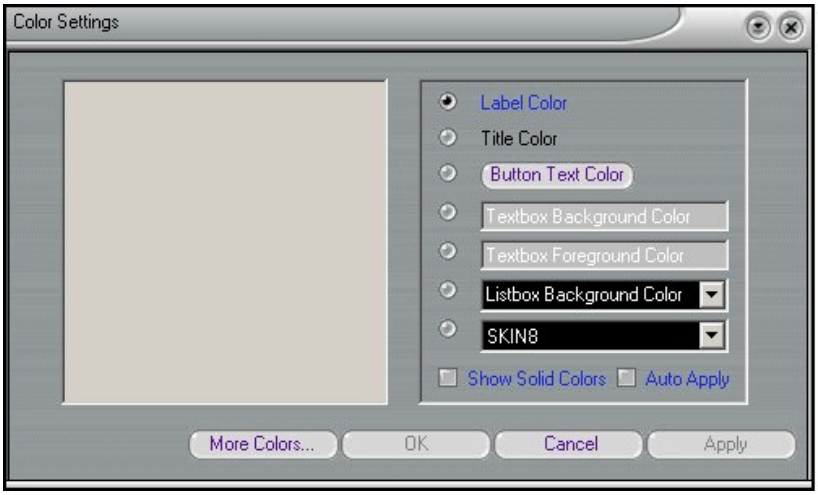
PatentPleeze Setup

By selecting ***Setup*** from the menu bar, you can specify where your patents will be saved by selecting the location of the database file (dbartin.mdb). You have to specify if you are using the **Local database** or the shared **Network database**.

To create a new database, simply type in the directory where you would like to create the database. To select an existing database, use the **Modify** button to locate the database file.

Share documents with other users by creating a database on a shared drive on the network under **Network database** the option.

Remember to specify which **Output Format** you would prefer to use by default from the ***Setup*** menu.



Colour Setting

You can change the skin of the **Download Interface** and Colour of most features.

Potential Problems -

(1) No patents are downloading

Check that :

- your Internet connection is working
- your firewall is not blocking PatentPleeze
- your Internet Explorer is functioning properly with other sites
- the source for the required patent is online (esp@cenet,USPTO,CIPO,Depatis)

* It may take a while before page downloading starts since all text is gathered first.

(2) Slow download

The various sites are usually quite fast, (notably the USPTO) but Esp@cenet is less predictable being, at times, extremely fast and at other times, quite sluggish.

(3) Patents not found

Not all patents are available through the Internet.

Esp@cenet offers the most comprehensive coverage followed by ~~Depatis,~~ USPTO , CIPO and the Australian Patent Office. Esp@cenet should be used first, if one is looking for a rare German patent, then Depatis is a good option. You can download the patent manually from Depatis and insert it in the database with the <add doc> feature The USPTO site is quite fast and should be used when looking for design, reissue or plant documents. In order to obtain these documents follow the USPTO format. (You will have to use the "edit" feature or the "add item" feature of the list in order to follow that format).

Some sites (namely USPTO and Depatis) impose limits on the number of pages you can download daily. (It also depends on how busy their server is). If you have a rather large amount of patents to download you should stick with Esp@cenet.

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The way the program is written makes it dependent on the internal structure of patent sources websites. If these websites are modified by their respective owners it might affect the proper functioning of PatentPleeze. In such circumstances an update will be made available as soon as possible.

(5) Problems with printing

If you add a note on a PDF document you may have problems printing with some printers. You may want to try to "print as image" in order to solve this issue.