Documentation for PatentPrism v.1.0

4/7/2007

1. About PatentPrism

PatentPrism provides an efficient, versatile and user-friendly interface for supporting a variety of patent-related activities including patent searching, analysis, report publishing and presentation, using publicly accessible on-line databases. This program operates in the Microsoft Excel spreadsheet / Microsoft Office environment, and you must have Microsoft Excel installed on your computer to use PatentPrism. PatentPrism is a product of Concepdance, LLC, which holds all rights thereto. PatentPrism is the subject of one or more pending patent application.

Author's Note

PatentPrism is my principal on-line search and patent document handling tool, used nearly every workday and saving me at least several hours labor per week, compared with conventional on-line searching and related activities. I routinely use electronic reports as published by PatentPrism as effective discussion and presentation tools, and the convenience of the interface has nearly eliminated my need for storing copies of patent documents. PatentPrism is not about developing the next and faster database, but about providing comfortable and ready access to already impressive public resources established by patent authorities around the world. PatentPrism's development continues as users provide feedback, as on-line databases grow in size and complexity, and as the needs of my intellectual property consulting practice evolve. PatentPrism is a practical and efficient business tool that I hope you enjoy and find as useful as I do.

Steven Bittenson 1/23/07

2. System requirements and compatibility

A. Minimum system and spreadsheet program requirements: *Operating system:* Microsoft Windows XP or Windows 2000 (not tested with Windows Vista as of this writing). ***Spreadsheet:*** Microsoft Office 2003 or 2000* or the versions of Excel therein (Excel V9 or later) (not tested with Office 2007 as of this writing). The Concepdance website may report updated compatibility information. ***Other Systems:*** PatentPrism V1.0 is not currently compatible with Apple Macintosh versions of Microsoft Excel, but electronic reports generated using PatentPrism are Macintosh compatible, tested using Macintosh OS 10.4 and Excel 2004 for Macintosh.

B. Internet search engines: Microsoft Internet Explorer v.6 or later.   Different web browsers download data in different formats. PatentPrism includes text parsing and formatting routines to interpret database records and to generate / update hyperlinks. Some of these routines are browser-specific, so although you can put data into PatentPrism using other browsers, that data may not be processed correctly by the software.

C. .pdf and .tif image viewers: A TIFF (.tif) viewer is needed to view, print, or download patent or published application images files from some parts of the USPTO on-line database. The USPTO website provides information about USPTO compatible TIFF viewers. A TIFF viewer that provides multipage TIFF document downloads and printing from the USPTO is advantageous. A .pdf reader is needed to view many other patent documents on-line. A .pdf writer may also enable you to create .pdf files ("print" to .pdf) directly from the USPTO web pages once you have a TIFF viewer.

D. Desirable accessory: A pointing device having software-assignable accessory buttons for copying and pasting data. Various other means for copying and pasting are acceptable (e.g., right click-Copy and right click-Paste, Toolbar commands or keyboard shortcuts), but accessory buttons can be more convenient and quicker to use. This functionality has been tested for PatentPrism using trackballs and computer mice, for example, with a left accessory button assigned to COPY and a right accessory button assigned to PASTE.

E. * PatentPrism is backward compatible to Microsoft Office 2000 (Excel v9) with the following limitations (if the early versions are used): 1) Text formatting and editing within spreadsheet cells in the "Presets" and "Search" pages require double-clicking the selected cell, then editing within the cell. 2) Cell sorting operations don't work in the "Presets" or the "Search" page. Sorting can still be done within published reports. 3) The two "Select" buttons just above the workspace in the "Search" page do select the respective columns, but don't enable sorting or text finding. 4) Importing of Presets information from other copies of PatentPrism must be done manually (the "Import Presets" button on the Presets page does not work).

3. Features

General: PatentPrism provides tools for accessing, searching, downloading, processing and publishing patent information from publicly accessible on-line databases. Version 1.0 works with USPTO and WIPO databases. Search strings can be entered and edited in the program's interface, or in text entry fields associated with a database. Data records downloaded to any of six PatentPrism workspaces can be displayed in a common format. Single-click report publication is provided, including reports with updatable hyperlinks.

Workspaces for general or preset searches: PatentPrism provides independent, single-click selectable workspaces for performing / tracking up to six concurrent searches. Each workspace includes settable parameters for searching and report publication. Settings can be adjusted for a general search, or use preset search strings, sorting category titles and date ranges for, e.g., periodically updated searches.   Each workspace includes a vertically extendible area for data records, which also accommodates annotation. Spacing, manipulation and formatting of data from disparate sources can be performed using individual selected controls or using built-in autoformatting.

Chordal interface: Four vertical columns of buttons at the left of the workspace have specific functions when selected individually, and have several additional contextually-determined functions when selected in vertical and/or horizontal combinations (chords). The context is determined by adjacent data in the workspace.

Search strings: can be entered at your desktop or within the database being searched. Search strings on the desktop can be customized to meet individual database requirements, including software assistance for some differences among databases. From the desktop, search strings can be used selectably for US patent, US published application, or WIPO searching. Search strings are automatically copied to the workspace to simplify tracking. Search strings can be revisited and edited at any time during a search, e.g., to perform additional searching. Search strings can be entered for each new search, or stored as presets for regular / periodic / competitor searching.

Common data and hyperlink format for USPTO and WIPO records: Data entered into a workspace from USPTO and WIPO sources is converted into a common format including hyperlinks to the originating search page associated with document numbers. In some cases, other databases can also be accessed using the chordal interface. The hyperlinks can be updated within the interface to accommodate changes or upgrades in the source databases.

Convert lists of patent numbers to hyperlinked reference tables:
Patent/document number and text information can be copied into the workspace from other documents to take advantage of the formatting and link generation capabilities of PatentPrism. For example, a list of patent numbers can be copied into the workspace from a text document, then converted for access to the referenced documents, public PAIR and assignment databases. For example, reference lists from on-line US patent text documents at the USPTO website can be copied into the workspace and converted to a more easily searchable format.

Duplicate reference identification: Marks duplicated citations in the workspace, providing functionality for comparing searches and eliminating redundancy. Duplicate or first citations can be removed manually or automatically, and the marks can be removed at any time. Duplicate references are numbered, and multiple duplications are identified.

Single click report publication: Formatted, dated, editable or protected search reports can be published to your desktop. Typical report file sizes are 25-50kB, including hyperlinks. The reports are suitable for printing or for distribution by e-mail and can be set to include links to the public PAIR and/or the USPTO assignment databases as well as to document lookup at the USPTO and WIPO. "Boiler plate" titling and report notes can be entered as preferences, providing single-click publishing.

IPC and USPTO patent Classification Links: These hyperlinks are provided in the interface for user convenience, adjacent to corresponding search string text fields.

Hints: Hidden, or either of two levels of user information are available by selecting a button in the interface.

4. Installation Notes

A. To install PatentPrism, double-click an uninstalled copy of PatentPrism and select Enable Macros. Follow instructions in the installer. The installer appears the first time PatentPrism is opened, and as a reminder when a license is nearing expiration.

B. A 20-character License Code from Concepdance is needed to install and use PatentPrism. Licenses are time-limited / renewable. The first time you open an uninstalled copy of PatentPrism, an Identification Code is displayed for your copy of the program. The Identification Code is communicated to Concepdance, which provides a Code with which to install PatentPrism.

C. Licenses are time-limited and renewable. Full access to the software continues for a grace period following expiration of a license After this period, access continues to existing searches in the program interface, but the search automation no longer functions until a new License Code is entered.

D. PatentPrism is installed as a Microsoft Excel file on your PC. PatentPrism files must include the letter sequence "cps" before the .xls extension of the file. An individual software license is user-specific (specific computer or specific user on a network).

E. Macros must be enabled to install and to use PatentPrism. If Macros are not enabled, a generic welcome screen is displayed, with additional access only to this documentation page (text only), using sheet tabs in Excel (at the bottom of the displayed page). Hyperlinks in published reports can be used without Macros enabled.

5. Quick start guide

Notes about PatentPrism files

A. Filename: PatentPrism must be installed on your computer as a Microsoft Excel file including the letter sequence "cps" anywhere in the filename before the ".xls" extension. Depending on how your computer is configured, the ".xls" extension may or may not be displayed.

B. Opening files: PatentPrism files can be opened using any usual file-opening method, e.g., double-clicking the file icon, or using a File-Open command.

C. Macros: Select "Enable Macros" if requested when opening a PatentPrism file. The appearance of this request depends on the security settings in your copy of Excel.

D. Saving files: PatentPrism can be saved, saved to a different folder on your computer, or renamed per item A. above. PatentPrism is not preconfigured for automatic file saving. Please save your work as needed.

E. Single open file: You can save multiple copies of PatentPrism on your computer (preferably with different filenames), but only one copy of PatentPrism should be open at a time. If you save PatentPrism with a modified filename, it is suggested that you close and reopen the PatentPrism file or your internet browser before proceeding. This prevents your browser from seeking the previous filename on return from an on-line database that has been previously accessed using a hyperlink in PatentPrism.

F. Reports: Reports published from PatentPrism are automatically placed in the same folder as the copy of PatentPrism generating the report.

Using a PatentPrism file for the first time (tutorial)

A. Open a PatentPrism file as described above. If properly installed and licensed, a Search sheet will be displayed, following transient display of an opening screen. The Search sheet has a control area at the top (including various software buttons and text fields), and a Workspace below, with colored columns to the left of the Workspace.

B. Click on the Title text (large font) at the top of the Search sheet and enter a new search title if desired. Suggestion for an introductory search: "Music and Dance." Click the Return or Enter key on your keyboard to complete the entry.

C. Click on the "Searcher's name" text at the right near the top of the sheet and enter or edit a name if desired. Click the Return or Enter key on your keyboard to complete the entry.

D. Click on the Hints button near the top of the sheet (the label changes when you click it). Then click it a second time to show hints. This button cycles the sheet among "Show Hints & Labels", "Hide Hints", and "Hide Labels."

E. Enter a simple search string in the US Patent Search string entry field. Suggestion for an introductory search: **aclm/music and dance**. This represents a search string for the term "music" in the claims field and "dance" anywhere in the document, using USPTO search syntax.

F. For each of the US Publication and WIPO Publication fields, click the respective **Copy Patent String** button, then the respective **AutoMods** button. Note changes in the WIPO search string.

G. Select one of the three buttons: **US Patents**, **US Published Apps**, or **WIPO(PCT)**. The first time you link to a particular website in any session, it may take several seconds to establish the link. Subsequent linking to the same site within a working session is generally much faster.

H. When you get to the selected site, click in the text entry window, Paste (e.g., Edit-Paste or Ctrl-V, or an assigned mouse button) into the window. The search string is already in the clipboard and should appear in the entry window. Then click the website's "Search" (or equivalent) button associated with the text entry window.

I. When your search results appear, select over them, including any leading numbers at the left, and select Copy (e.g., Edit-Copy, Ctrl-C, Mouse right click-Copy, or a so-assigned mouse button).

J. Use your Browser back arrow to return to the Search sheet. This may take several clicks, depending on the website being accessed. You can also return to the Search sheet by clicking on the relevant spreadsheet icon on your Desktop or by closing the browser window. Use one of these latter methods if your browser does not provide a back arrow.

K. In the Search sheet, select the first blank cell in the column labeled A of the workspace below the red text "Paste new records below," (this is column 7 in the column header), then Paste into that cell. This cell is also indicated by an arrow in the colored columns. Depending on your return method (per J. above), a cell in the Search sheet may already be selected for your convenience. In this case, no cell selection is needed before pasting. Your selected data should appear in the Workspace.

L. Select (click) anywhere in the blue vertical "Format" bar to format the pasted data. The Format software reformats and creates hyperlinks back to the source database. The formatted results are numbered, and the number of references is reported just above and toward the right side of the Workspace. The other vertical colored bars perform other manipulations of database records, described in the Specific Functions section below.

M. Select any of the created links (blue font in column A) to return to the website from which that record originated. Paste into the text entry box and click Search to go to the document (the document number was placed in the clipboard when you selected the link).

N. Repeat the steps above for other hyperlinks and searches. Other features are described in the Specific Functions section below.

O. Click Publish Report to publish your results to the same folder as the active copy of PatentPrism. The file name of the report uses your title and a date/time stamp. You can generate and freely distribute reports published using PatentPrism, but your license prohibits distributing the PatentPrism program itself beyond the individual Subscriber. Double-click the search report to open it.

P. Read through the Specific Functions section below and try them out.

6. Specific Functions
Control areas

A. Upper (control) and lower (workspace) sections: The upper section of the interface includes software control buttons, text entry fields and information about the current search. The upper section is displayed somewhat differently for Preset search types than for General search types (described below). The lower section is a Workspace for patent search results. The Workspace is vertically extendible, limited to two thousand (2,000) rows. The two left columns of the workspace are labeled A and B in buttons above the workspace. Column A is used for holding patent and publication number links, patent search strings and associated links, and category headers / titles to assist in sorting search results. Column B is used for document names and for annotation. Columns A and B correspond to columns 7 and 8 in a standard Excel spreadsheet (R1C1 reference style). The vertical bars to the left of the workspace (labeled above the workspace) comprise software buttons of the chordal interface detailed below.

B. Vertical bar functions adjacent the workspace (general): From right to left, the vertical bars are: RED (delete selected data rows), VIOLET (restore or replace last removed data rows), GREEN (insert a selected number of blank rows), and BLUE (reformat all the data in the workspace). The buttons above each of column A and B select the active section of the workspace in the respective column. Selecting across A&B selects both columns. The selected columns can be searched using the Excel Find function or sorted using the EXCEL sort function. Use of the NO HEADER ROW option is recommended for sorting in the workspace. Sorting cannot be undone in the workspace. Note: When sorting, Columns A and B are labeled 7 and 8, respectively, in Excel.

Specific functions in the upper section

A. Title field: Editable. Reports published from the present search reproduce this entry. When New Search is selected, any preset title is entered here.

B. License information: Not editable.

C. View Documentation button takes you to this page, which includes navigation buttons and a Return button to the Search page. If Documentation is viewed with Macros disabled, the buttons are not visible.

D. Hints and labels button. This button has three states that cycle with consecutive clicks allowing you to view all hints and button labels, hide hints but leave some labels visible, or hide hints and most labels to minimize the size of the control area at the top of the interface.

E. Today's date: Not editable.

F. Searcher's name field: Editable. Reports published from the present search reflect this entry. When New Search is selected, any preset Searcher's name is entered here.

G. Search selection buttons: These 6 buttons are used to select a current search type. Click a button to switch search type. The selected type button is bright green and is displayed with a larger font than the other 5 buttons. Among the other 5 buttons, a full colon preceding and following the button name indicates a search type with saved search parameters (i.e., for regular searching). A search type button displaying a red font indicates that search data is present in that search type, that is, a search is in progress. When a different search type is selected, the Search Type Button names are updated to include the first 16 characters of the title of the search being left, unless overridden by a preset button name.

H. Edit Presets button: links to another page for entering or editing parameters for the presently selected search type. These parameters include Search title, Searcher name, Button name, Filename, Search category labels, Search strings, and presentation notes for published reports (boilerplate). A return button is provided on the Edit Presets sheet for returning to the Search Sheet. Details of the Presets sheet are provided in an "***Edit Presets Window Details***" section below.

I. New Search button. Clicking New Search clears the selected search and refreshes the interface, restoring any available preset parameters. If this is a General type search (no preset search defined) search string entry fields are displayed.   If this is a Regular Type search, date range selections are displayed instead. The last report publication date is also displayed in the area to the right of the date selection buttons.   In addition, the first 16 characters of the title will be used as the button name for the present ongoing search, and the first 25 characters will be used as a filename in any published report, appended with a date & time stamp: yyyymmddhhmm. Filenames of published reports are editable within the limits of your computer's operating system.

J. Date Range Button area. Visible with Regular Search Types only: These buttons are displayed when a Search Type has been set as a Regular Search. Clicking any of these buttons sets the indicated **issue or publication date range** for patent or publication searching. The selected button is bright green. The "Select a date range" button applies dates entered (blue text) in the labeled spaces to the right of that button. When **New Search** is clicked, the default date range is the month (31 days) preceding and including the present date. The Start Date and End Date can be set equal to one another to search a single date. If the End Date is set earlier than the Start Date, the "Select a date range" button turns red when clicked, and the entered date range cannot be searched. Entering an allowable date range and clicking the button again turns it green.

K. Edit Search String button. Visible with Regular Search Types only: brings up an editing window within the search sheet that displays all preset search strings, and includes a return button.

L. Delete this search type removes stored parameters for the present search type, resulting in a general search window on the next **New Search** click. A confirmatory click is required to delete a search type. Clicking elsewhere in the interface before the confirmatory click cancels the Delete command .

M. Patent string entry fields: These three fields are for entry and editing of search strings for advanced searching of US Patent, US Publication, and WIPO Publication databases. The syntax of these entries must meet the requirements of the respective databases.

N. Copy Search String and Auto Mods buttons: These buttons, for US Publications and for WIPO Publications, copy the US patent search string into the respective field. The **Auto Mods** buttons apply several differences among USPTO patent search syntax & application search syntax and WIPO search syntax, to attempt to modify the search string for the respective search engine. The modified search string can then be further edited as needed.

O. US and International Classifications buttons: These buttons provide hyperlinks to the respective respective classifications databases at the USPTO and at WIPO.

P. Define Preset Search button sets up a Regular search type, including the search strings. The next time New Search is clicked, a Regular search window appears rather than the General Search window for this search type. The regular search window displays date selections rather than the search strings, which remain editable either through the Edit Presets button or the Edit search String button. A search string must be entered in at least one search string field to define a new preset search.

Q. Patents, Published Applications, WIPO (PCT) buttons. These buttons include links to the respective advanced search pages. If the current search is a General type search, the respective entered / modified search string is copied into the clipboard for pasting in a text box at a respective advanvced Search page (or, you can enter search text at the PTO site). If the current search type is a Regular type search, then a saved search string associated with that Search Type is appended with the selected date range (of issue or publication) and placed in the clipboard for pasting at the USPTO Search site. Back arrows in your browser can be used to return to the Search sheet Clicking on an icon for PatentPrism will maintain both windows open. Suggestion: minimize the number of windows open to minimize the usage of these public sites.

R. PAIR and Assignment DB buttons: These buttons link to the Public PAIR and US Assignments database search pages, respectively.

S. Identify Duplicates, Clear Markers, Remove Duplicates and Remove First Occurrence buttons: Identify Duplicates searches the left column (A) in the workspace and finds duplicated entries (buttons turn red). The first instance of a duplicated entry is labeled with a number on a green background in the leftmost column. Each instance of a duplicate of that entry is labeled with the letter x followed by the same number, on a red background. Additional duplicated entries are given consecutive numbers, e.g., "2" (green) and "x2"(red). Other columns in the workspace are ignored by Identify Duplicates. **Clear Markers** / **End** clears the identifying cells in Column 1. **Remove Duplicates** deletes the rows with "x" and respective marks, leaving the green-marked originals in place. **Remove first occurrence** removes the green marked rows, leaving the red ones in place. It pays to inspect duplicates before deleting them because only the left column is checked for duplication. Exit the routine by clicking **Clear Markers** / **End.**

T. Publishing options button: Clicking Publishing Options before publishing a report displays a window in which you can toggle Links, PAIR and Assignment database access on and off in the next report only. Nonvolatile versions of these settings are accessible via **Edit Presets.**

U. Publish Report button: Clicking Publish Report generates a report as a new file in the same folder as PatentPrism. As published, reports are protected from change, but no password is required to unprotect them (Tools-Protection-Unprotect). Use Edit Presets to set notes, titles for regular searches.

V. Update Web Addresses button: Opens a window for updating hyperlink addresses of databases at the USPTO and WIPO, which are subject to change by the respective authorities.   At the time of this writing, USPTO addresses were most recently noted to have changed during May of 2006. If updating is required, copy new addresses from the address window of your browser at the appropriate web page.

W. Copy to xfer clipboard and Paste fm xfer clipboard button: Select cells in the Workspace, then click the Copy to xfer clipboard button to copy the selection to an auxilliary clipboard for storage. Red notation cells (Paste new data below and Entries below have not been sorted) are not copied into the clipboard. You can then change search type, select a cell in the new workspace, and click Paste fm xfer clipboard to paste the clipboard contents. This function is currently limited to 20 rows of data. Entire Row selections are not accepted by the transfer clipboard.

X. Select this data column (A) and (B) buttons: Selects the occupied vertical area in the respective column below (either or both). Excel's built-in Find and Sort functions can be used on the selected areas. Note: the Find and Sort functions are not enabled if PatentPrism is used with Excel 2000.

Y. Number of linked references or number of duplicated references: Located to the right of the "Select this data column" buttons, displays the number of formatted references. If the Duplicates functionality is in use, this display switches to show the number of duplicated references.

Specific functions (Workspace section)

A. Delete or Move Row (red vertical bar): Clicking this bar at any vertical position along the Workspace, or selecting up to 20 cells vertically along this bar (vertical chord), copies the entries in the selected row(s) into a storage register / stack, then deletes the row(s) from the Workspace. The storage stack is 20 records deep. The deleted records can be restored as described below.

B. Restore or place row (violet vertical bar): Clicking this bar at any vertical position along the Workspace, or selecting up to 20 cells vertically along this bar (vertical chord) in the Workspace, inserts the selected number of stored entries from the top of the storage stack into the Workspace. If a space in the storage stack is empty, a blank row is inserted. Thus you can move one or more record in the workspace by clicking the red bar next to the entry, then clicking the violet bar at the desired insertion point. Once placed back in the Workspace, the placed record is deleted from the stack.

C. Insert a Row (green vertical bar): Clicking this bar next to an entry, or selecting up to 20 rows vertically along this bar (vertical chord) in the Workspace, inserts the selected number of blank rows into the Workspace.

D. Format References (blue vertical bar): Clicking this bar at any vertical position along the Workspace starts a formatting program that performs several functions: a) create / repair links for entries in Column A that are recognized as USPTO or WIPO document numbers, b) parse complex text entries downloaded to the Workspace to attempt to extract document numbers for Column A and document titles for Column B, c) adjust vertical spacing between rows for convenient reading sorting /reporting, d) add row indicators in the leftmost column to assist in the workflow.

E. Select entire row, and reference numbering (leftmost column, no color): Clicking in this column at any vertical position along the Workspace, or selecting up to 20 cells vertically in this column in the Workspace, selects the entire respective rows of the workspace. The selection can be dragged vertically in the workspace, and the entire row selection of a single row is maintained when vertical keyboard arrows are used to move the selection, or when Insert or Delete columns are clicked. This enables the user to use the entire row selection as a highlighter for scrolling vertically through entries in the workspace while analyzing data. In addition, the leftmost column is used to report the numbering of hyperlinked entries or, when the duplicates functionality is in use, first occurrence and duplicate labeling of data records. Clicking elsewhere in the Workspace cancels the entire row selection.

F. Public PAIR access using multi-column selection (3-column horizontal chord). If there is a hyperlink to a US Patent or Publication in column A, you can temporarily modify it to point to PAIR instead of to the document number search page: **PROCEDURE:** I**n the desired row containing a hyperlink in column A, select the violet, red, and A columns**. The selected link now points to PAIR instead of to the documnet lookup page, with the selected patent or document number placed in the clipboard for pasting into the PAIR entry field. In addition, the colored columns now display "PAIR." **Click the modified link to go to PAIR**. When you click anywhere in the Workspace except the selected link or below the final entry in the Workspace, the link resets to point to the document lookup page.

G. **US Assignment database access using multi-column selection (4-column horizontal chord).** If there is a hyperlink to a US Patent or Publication in column A, you can temporarily modify it to point to the US Assignment database instead of to the document number search page: **PROCEDURE: In the desired row containing a hyperlink in column A, select the green, violet, red, and A columns**. The selected link now points to the Assignment database instead of to the documnet lookup page, with the selected patent or document number placed in the clipboard for pasting into the PAIR entry field. In addition, the colored columns now display "ASSN." **Then click the modified link to go to the assignment database.** When you click anywhere in the Workspace except the selected link or below the final entry in the Workspace, the link resets to point to the document lookup page.

H. **Convert a text entry in column A to a search string link to the USPTO Advanced Patent Search Pages (3-column horizontal chord).** When performing a search, particularly a General Type search, search strings or terms are copied into Column A in the Workspace. If you wish to use one of these search strings again later (e.g., after editing), you can turn the text entry into a link to an advanced search page. **PROCEDURE: In the desired row containing the search text, select the violet, red and A columns**. The text in column A is converted to a link. In addition, the colored columns now display "ADVP." Then click the created link to go to the USPTO advanced patent search page. When you click anywhere in the Workspace except the selected link or below the final entry in the Workspace, the link resets, converting back to text.

I. **Convert a text entry in column A to a search string link to the USPTO Advanced Publication Search Pages (4-column horizontal chord).** When performing a search, particularly a General Type search, search strings or terms are copied into Column A in the Workspace. If you wish to use one of these search strings again later (e.g., after editing), you can turn the text entry into a link to an advanced search page. **PROCEDURE: In the desired row containing the search text, select the green, violet, red and A columns**. The text in column A is converted to a link. In addition, the colored columns now display "ADVA." Then click the created link to go to the USPTO advanced publication search page. When you click anywhere in the Workspace except the selected link or below the final entry in the Workspace, the link resets, converting back to text.

J. Convert a text entry in column A to a search string link to the WIPO Publication Advanced Search Pages (5-column horizontal chord). When performing a search, particularly a General Type search, search strings or terms are copied into Column A in the Workspace. If you wish to use one of these search strings again later (e.g., after editing), you can turn the text entry into a link to an advanced search page. **PROCEDURE: In the desired row containing the search text, select the blue, green, violet, red and A columns**. The text in column A is converted to a link. In addition, the colored columns now display "ADVW." Then click the created link to go to the USPTO advanced search page. When you click anywhere in the Workspace except the selected link or below the final entry in the Workspace, the link resets, converting back to text.

K. Convert a list of document numbers into an advanced search string. (4-column by up to 20 row chord). The purpose of this function is to turn any list of up to 20 document numbers into the common format for patent and publication documents in the Workspace. **PROCEDURE: a) paste the desired list into column A of the Workspace. b) Format the Worspace (blue column). c)Make a rectangular selection select over the green, violet, red and A columns, and vertically over the length of the list**. Search strings are generated, (best effort to convert the list into document numbers), and to provide correct syntax for looking up documents via advanced searches in relevant databases. Click **Patents** or **Published Apps** or **WIPO/PCT** to go to the respective search pages, then paste into the text entry field and click search. The search result can be copied & pasted into the workspace as with any other search result, then Formatted again to provide a converted list.

L. Move rows (records) into a holding area (Reserve area), e.g., for accumulating interesting references or for potential deletion later **(2-column by up to 20 row chord).** This function addresses a common need in patent searching to place certain references aside but accessible while addressing other aspects of a search. The area is herein called the "Reserve Area" and positioned at the top of the Workspace. **PROCEDURE to create and add to the Reserve Area: In the desired row, or up to 20 rows containing the records to be moved, select the red and A columns.** The selected records are moved to a labeled Reserve Area section at the top of the Workspace. These records are manipulated as any other entries in the sheet, and the entire Reserve Area or any part thereof can be deleted at any time using the Delete function (Red column). Additional selections of these columns are inserted above earlier references in the Reserve Area.

Edit Presets window details

    A. Restore Defaults button. Default data has been provided for several options and text fields. To prevent accidental resetting to the default values, clicking this button results in the display of confirm & cancel buttons for resetting to the defaults.

B. Save and Return to Search Page buttons. Save is a standard spreadsheet SAVE command, provided here as a reminder to save any edits you make in the Search Type sheet. Return does not include a SAVE command

C. Import Presets button opens a tool for importing Presets from another copy of PatentPrism into the open copy. This tool can be used for transferring Presets when a new copy of PatentPrism when an upgrade is installed, or if you maintain multiple copies of PatentPrism on your computer and need to reorganize the Presets between copies.

D. PAIR and Assignment access buttons. Select the types of links available in a report of this type. The selections are overridable (see Edit Publishing Options above)

E. Title / header text field can be any text. The title is placed at the top of each new Search sheet for searches of this type, and used as a title for any report published therefrom. If left blank or cleared, a default title is inserted by the software.

F. Filename text field. Is treated similarly as the Title / header field above, but is limited to 25 characters in length (truncated automatically to 25 characters if a longer name is entered), and a report published using that filename is appended with the publication date and time in the format "Filenameyyyymmddhhmm"

G. Search Type button label text field. If you make an entry here, it appears instead of a default text in the associated Search Type button on the Search sheet. This entry is limited to 16 characters to keep it from extenting past the edges of the button in the Search sheet.

H. Searcher's name. This field can be left empty without being replaced by default text.

I. Category fields for sorting search results. These fields are described in more detail in the individual Search Type sheets. Font formats selected here are carried into the a search sheet.

J. Search string fields for patent and publication searching (Regular Search Types Only). 30 spaces are provided for these entries. These entries are subject to the syntax rumles and length limits of the USPTO search engine. Do not include issue dates or ranges in these strings, as these are added automatically when a Date Range is selected in the Search sheet.

K. Reference text / "boiler plate" text fields for search reports. 10 lines are provided. Maximum 256 characters per line. Text wrapping is used in published reports. Entries here are copied (including formats) into published search reports for the selected Search Type. Trailing empty rows are hidden in published reports to avoid large empth vertical spaces between the notes and data copied from the Search sheet into the report.

7. Working Notes

A. If you have more than 50 results from your search in a USPTO advanced search page, you can copy 50 at a time to the Search page. In this situation, don't use the back arrows in your browser as this would lose the search result at the USPTO. Instead, leave the USPTO window open and click on the icon for PatentPrism to return to the Search sheet, to paste the data. Then click on the website again to retrieve more data (next results).

B. Format your search results (blue vertical bar) before otherwise manipulating them in the workspace You can return to a database to retrieve additional results before formatting the workspace, but do format before performing other operations on newly downloaded records.

C. Save your work frequently to prevent data loss. PatentPrism does not include automatic SAVEs, as autosaving at some times during a search might be undesirable.

D. Rows (records) can be dragged vertically in the Search sheet using the entire row select function in the left column of the workspace. Although you can also drag individual cells around in the workspace, it's possible to lose or corrupt data in that manner, so it's not recommended as usual practice.

E. In general, using PatentPrism reduces the amount of connect time required on-line to perform a patent search, relative to conventional on-line searching. Depending on how you use PatentPrism, you can have several on-line search windows open simultaneously as you perform a search. Please remember to close any such extra windows that you are not using.

F. Using the Duplicates functionality, you can delete first occurrence and delete duplicates, to identify and keep only unique references among search results.

G. If you find yourself selecting a button or chord in the interface by error, or change your mind mid-selection, you can cancel the selection before it executes by expanding it horizontally to include two or more text column to the right of the colored columns in the workspace, or vertically to include more than 20 rows in the workspace, or up into the top section of the Search sheet.

8. Reports: details and use

A. General: Reports are published from PatentPrism as Excel spreadsheets. If a report includes hyperlinks, Macros must be enabled for full functionality, although allowance is provided (described below) for using hyperlinked reports with Macros disabled. Publication options are accessible through Edit Presets (nonvolatile) and through Publication Options (one-time) buttons. If you have a .pdf writer, you can convert reports to .pdf files for distribution. Hyperlinks published in PatentPrism reports are not active when printed to a .pdf file.

B. Report publishing options

i) Links ON/OFF: Publishing a report with Links OFF provides a simple report including no hyperlinks or macros. Recommended where only printed reports are desired. Publishing a report with Links ON provides hyperlinks between document numbers in the report and patent or publication number search pages at USPTO and at WIPO websites The links are NOT directly to referenced documents, but to a search page for the document. This approach, supports link address updating, and in some instances, faster links.

ii) PAIR ON/OFF: If PAIR is set to ON, a colored bar appears to the left of published reference numbers. Clicking on this bar at the vertical position of the desired reference number opens the Public PAIR search page at the USPTO. This feature is independent of the ASSN feature below.

ii) Assignments ON/OFF: If ASSN is set to ON, a colored bar appears to the left of published reference numbers. Clicking on this bar at the vertical position of the desired reference number opens the US assignments database search page at the USPTO. This feature is independent of the PAIR feature above.

C. Using hyperlinked reports with Macros Enabled: Double click the report to open it. When requested, Enable Macros. Clicking on a hyperlink in the open report (colored font reference numbers) opens a search page in the relevant database. The document number is already in the clipboard. PASTE into the text entry field of the search page to enter the document number, then click the "Search," "Find," or similar button on the page to open the requested document. Back arrows in your browser return you to the report. If PAIR or ASSN links are published with the report, the document number is similarly copied to the clipboard, but you must pay attention to details of the search page to paste into the correct location (Assignments) or to select the correct data type (PAIR).

D. Using hyperlinked reports with Macros Disabled: Double click the report to open it. When requested, Disable Macros. Select over a desired hyperlink (colored font reference number) and the empty spreadsheet cell immediately to its left in the open report. COPY the selection using a keyboard shortcut or a Menu command (Ctrl-C, or Edit-Copy). Then select the same hyperlink you just selected over. This action opens a search page in the relevant database, and the document number is in the clipboard. Proceed as described above for Enabled Macros.

E. Protecting/unprotecting reports: As published, reports are Protected from change Using Excel's Protect Worksheet functionality, but no protection password has been entered. To unprotect the sheet for editing, select in the Menu Bar: Tools-Protection-Unprotect Sheet. The sheet can be protected again as desired, with or without a password using Tools-Protection-Protect Sheet. Recommendation: Keep reports protected unless there is a reason to unprotect them.

F. How to update hyperlink addresses in a report: With the report unprotected, select in sequence the "Searcher Name," the "Report Date," then the "Searcher Name" again. This opens an address editing window in which you can edit or replace out-of-date hyperlink addresses for hyperlinks in the report. Software buttons are provided for using this editing window, as are general hyperlink addresses for the USPTO and WIPO to assist in locating the updated addresses.

9. Known Issues / notes

A. Re-accessing the Search Sheet and extra Save command on closing: When you close PatentPrism, you are always asked whether you want to save changes, even if you recently saved your changes. Select "Save" unless you have a reason not to save changes. If you decide you don't want to close PatentPrism at that point, click "Cancel." You can then select the "Installer" button on the displayed welcome sheet (lower right) to go to the Install page, from which you can renew a License, or return to the Search Sheet by selecting "Go to Search Sheet."

B. Returning to the Search screen without using back arrows in your browser: When you return to PatentPrism from a database window using back arrows in your browser, the cursor is generally repositioned by the software, which also resets the software for accessing a next hyperlink. If a different means of returning to PatentPrism is used, e.g., selecting on the PatentPrism file icon, or closing the Browser, the reset may not be performed. In such cases, the reset can be accomplished by selecting a non-hyperlinked cell in the workspace before selecting the next hyperlink. In addition, if you are retrieving more than 50 records from the USPTO patent or publication database, it is recommended that you Format the 50 pasted records before returning to the database to retrieve additional records. Otherwise you may have to select a position in the workspace twice, to get your selection to "stick" the next time you return to the workspace.

C. Occasional requirement of a second click to engage some functions. In some instances, e.g., due to awkward returns form an on'line database, a chord or the Format (blue bar) may not engage on a first click. If this occurs, click on a non-hyperlinked cell in the workspace, then try again.

D. If a cell format changes due to manual entries into the workspace, e.g., text wrapping changes, or because bordered or colored cells are pasted into the workspace, clicking the Format (blue) vertical bar restores the standard Workspace cell formats.