



USER MANUAL

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1. Report view mode (read only)

Report is a collection of publications which were listed, ordered and customized by one of the **reporteditor** users.

Each report has 4 main sections:

1. The header
2. The information section- Report ID, Title and Date.
3. The table of contents- List of the report publications ID's and titles.
4. The publications section- Each publication is displayed in a detailed publication frame.

One might open a report in its view mode in case:

1. He was invited by a friend who gave him a link to a public report. Public reports are reports that can be viewed without logging in.
2. He was invited to log in by another user who gave him a read only permission.
3. He is logged in and has an editing permission for the report but has chosen to open the report in its view mode.

In its view mode all the report publications are displayed in the web page one after the other and each publication is displayed in a separate frame with several tabs:

1. **Custom tab**- It is the front tab and it was customized by the editor of the report to display the most important content from the publication. This is the only tab in which the content is not restricted to be faithful to the original.
 2. **Bibliographic tab**- In case of a patent the bibliographic data tab will display the available following fields: Patent Number, Title, English Abstract, Applicants, Application Number, Application Date, Priority Numbers and Classifications.
 3. **Full Text tab**- In case of a patent the full text tab will display, if available, the description of the patent followed by its claims.
 4. **PDF tab**- In case of a patent the PDF tab will display, if available, the original document of the patent. Use the arrows buttons to navigate through the pages. You can also navigate to a specific page or section in the document. Use the **Download full PDF** button in cases where the whole document is needed for further use.
 5. **Legal (INPADOC) tab**- In case of a patent the Legal tab will display the patent legal events as they are retrieved from the INPADOC database.
Use the drop list at the bottom of the frame in order to view legal events of the other patent family members.
- **Also published as** - Each tab except the custom tab will show on its side bar a list of equivalent publications. They all belong to the same simple patent family and by clicking them you will make the tab change its content to the corresponding family member.

- **Open publication in a new window**- each frame can be opened separately from the report in a new window by clicking the corresponding icon located on the top left side of the frame.

In its view mode the report will include a menu bar at its header section:

File- A drop down menu of the report functions:

- Download as PDF
- Export Table of Contents
- Share
- Duplicate
- Help

Depending on the user permissions, only available functions are clickable in the file menu.

Download as PDF - Click in order to save or open a local copy of the report on your computer. PDF files, once downloaded, can be printed or sent by E-mail as an attachment.

Export Table of Contents - Click in order to open a view of the report table of contents that can be easily copied and pasted in other documents.

Change Report Mode - If you are logged in and you have the right permissions, you might want to change the report mode in order to edit it or in order to feel how it will be displayed for other users with different permissions. The different modes are:

- Subscribers Edit Mode
- Owner Mode
- Edit Mode
- Private View Mode
- Public View Mode

Depending on the user permissions, only available modes are clickable in the menu.

Share - Click in order to invite others to view the report.

In its view mode the share dialog box will allow you to give permissions to others to view the report but not to edit it.

If you are not logged in or you are logged in but not defined as a collaborator of the report, you will be able to send the report link to a friend by completing the form in the dialog box. If you are logged in and you are defined as a collaborator of the report, you will be able to give others the same permission (read only) and associate them as collaborators of the report.

Anyone can be invited. Invited users do not need to be registered users. In case the invited user Email address is not registered in our system we will send them additional instructions automatically.

You may invite more than one user at a time by inserting multiple Emails separated by commas.

All your invited users are listed in the share dialog box.

For privacy reasons, if you were invited by another user, the user who invited you will not have access to view or change your invited users list.

You may also remove permissions from users you invited. If you remove user permissions all his invited users permissions are removed as well.

If a user was invited by two users with different permissions he will enjoy the highest permission available for him.

If a user was invited by two users and was removed by one of them he will still have the permission of the other user.

E-mail notifications are optional for every change that is made with the share dialog box. Changes in the share dialog box are not saved until you click the Share & Save button.

Duplicate - Click in order to make a new copy of a report. You will be asked to rename the report title and ID. You will become the owner of the new report (the duplication) and therefore you will automatically get the editing permissions, regardless of the original report permissions you had.

Help - open the help pages.

2. Create new report

Only registered users and subscribers can create new reports.

Log in. On my reports page click the **New Report** button. A dialog box will open.

Insert your new Report ID and Title.

Click **Generate & Save Report** and your new report will be ready for editing.

Each report has 4 main sections:

1. The header
2. The information section- Report ID, Title and Date.
3. The table of contents- List of the report publications ID's and titles.
4. The publications section- Each publication is displayed in a detailed publication frame.

New reports are reports without publications and therefor their publications section and their table of contents are still empty.

New reports are automatically set to be in an edit mode.

3. Report edit mode

Report is a collection of publications which were listed, ordered and customized by one of the **reporteditor** users.

Each report has 4 main sections:

1. The header
2. The information section- Report ID, Title and Date.
3. The table of contents- List of the report publications ID's and titles.
4. The publications section- Each publication is displayed in a detailed publication frame.

A user might have a permission to edit a report in case:

1. He is the creator of the report and therefore the owner of it.
2. He was invited to log in by another user who gave him an editing permission.
3. He was invited to log in by another user who gave him a viewing (read only) permission but he duplicated the report in order to overcome the restriction in the new duplication. Duplications are considered in **reporteditor** as new reports.

In its edit mode all the report publications are displayed in the web page one after the other and each publication is displayed in a separate frame with several tabs:

1. **Custom tab**- It is the front tab and it can be customized by the editor of the report to display the most important content from the publication. This is the only tab in which the content is not restricted to be faithful to the original.
 2. **Bibliographic tab**- In case of a patent the bibliographic data tab will display the available following fields: Patent Number, Title, English Abstract, Applicants, Application Number, Application Date, Priority Numbers and Classifications.
 3. **Full Text tab**- In case of a patent the full text tab will display, if available, the description of the patent followed by its claims.
 4. **PDF tab**- In case of a patent the PDF tab will display, if available, the original document of the patent. Use the arrows buttons to navigate through the pages. You can also navigate to a specific page or section in the document. Use the **Download full PDF** button in cases where the whole document is needed for further use.
 5. **Legal (INPADOC) tab**- In case of a patent the Legal tab will display the patent legal events as they are retrieved from the INPADOC database. Use the drop list at the bottom of the frame in order to view legal events of the other patent family members.
- **Also published as** - Each tab except the custom tab will show on its side bar a list of equivalent publications. They all belong to the same simple patent family and by clicking them you will make the tab change its content to the corresponding family member.
 - **Open publication in a new window**- each frame can be opened separately from the report in a new window by clicking the corresponding icon located on the top left side of the frame.

In its edit mode the report will include a menu bar at its header section:

File- A dropdown menu of the report functions:

- Download as PDF
- Export Table of Contents
- Share
- Duplicate
- Help

Depending on the user permissions, only available functions are clickable in the file menu.

Download as PDF - Click in order to save or open a local copy of the report on your computer. PDF files, once downloaded, can be printed or sent by E-mail as an attachment.

Export Table of Contents - Click in order to open a view of the report table of contents that can be easily copied and pasted in other documents.

Change Report Mode - If you are logged in and you have the right permissions, you might want to change the report mode in order to edit it or in order to feel how it will be displayed for other users with different permissions. The different modes are:

- Subscribers Edit Mode
- Owner Mode
- Edit Mode
- Private View Mode
- Public View Mode

Depending on the user permissions, only available modes are clickable in the menu.

Share - Click in order to invite others to view the report.

In its view mode the share dialog box will allow you to give permissions to others to view the report but not to edit it.

If you are not logged in or you are logged in but not defined as a collaborator of the report, you will be able to send the report link to a friend by completing the form in the dialog box. If you are logged in and you are defined as a collaborator of the report, you will be able to give others the same permission (read only) and associate them as collaborators of the report.

Anyone can be invited. Invited users do not need to be registered users. In case the invited user Email address is not registered in our system we will send them additional instructions automatically.

You may invite more than one user at a time by inserting multiple Emails separated by commas.

All your invited users are listed in the share dialog box.

For privacy reasons, if you were invited by another user, the user who invited you will not have access to view or change your invited users list.

You may also remove permissions from users you invited. If you remove user permissions all his invited users permissions are removed as well.

If a user was invited by two users with different permissions he will enjoy the highest permission available for him.

If a user was invited by two users and was removed by one of them he will still have the permission of the other user.

E-mail notifications are optional for every change that is made with the share dialog box. Changes in the share dialog box are not saved until you click the Share & Save button.

Duplicate - Click in order to make a new copy of a report. You will be asked to rename the report title and ID. You will become the owner of the new report (the duplication) and therefore you will automatically get the editing permissions, regardless of the original report permissions you had.

Help - open the help pages.

Add patent literature to a report

In order to add a patent to a report, the user should have the right permission and the report should be in one of its edit mode. New reports are automatically set to be in an edit mode.

While you search in your favorite patent database and whenever you bump into a relevant patent document, just copy its number (publication, application or priority) to the corresponding retrieving box in the **reporteditor**, Click **ADD** and let us do the rest. Our system will retrieve all the available information about the requested patent- bibliographic data, full text, legal status, Family members and the whole document PDF copy. All the information will be presented in a frame with several tabs and the front tab which is called the custom tab will be the user worksheet for the retrieved patent. The fields in the custom tab are populated automatically with default content from the database but you can change their content as you like.

If more than one patent will correspond to the requested number a pick list will be displayed.

If no patents will correspond to the requested number our smart algorithm will try some manipulations before it will ask you to try another number.

With every patent that is added to the report additional retrieving box is added so you can add more patents where ever you like in the report- above, below or between listed patents.

The table of contents is automatically updated and all the changes are automatically saved.

Add non patent literature to a report

In order to add a publication to a report, the user should have the right permission and the report should be in one of its edit modes. New reports are automatically set to be in an edit mode.

Adding scholarly literature to a report- While you search in your favorite scholar database and whenever you bump into a relevant article, just copy its Digital Object Identifier (DOI) to the corresponding retrieving box in the **reporteditor**, pick DOI at the drop down menu next to the retrieving box, click **ADD** and a new frame with the corresponding DOI will be added to the report. The new frame will show only one tab- the custom tab which means that now you add the title, the publication date and the relevant content of the article.

Adding web address to a report- While you search the web and whenever you bump into a relevant web page, just copy its address (URL) to the corresponding retrieving box in the **reporteditor**, pick URL at the drop down menu next to the retrieving box, click **ADD** and a new frame with the corresponding URL will be added to the report. The new frame will show only one tab- the custom tab which means that now you add the title, the publication date and the relevant content of the web page.

With every publication that is added to the report additional retrieving box is added so you can add more publications where ever you like in the report- above, below or between listed publications.

The table of contents is automatically updated and all the changes are automatically saved.

Reorder report publications

In order to reorder a report, the user should have the right permission and the report should be in one of its edit modes. New reports are automatically set to be in an edit mode.

Reordering is simple and intuitive.

Each publication box has on its upper right corner 5 controllers:

Move to top- will bring the corresponding publication to the first place.

Move one up- will replace the corresponding publication with the publication above.

Move one down- will replace the corresponding publication with the publication below.

Move to bottom- will bring the corresponding publication to the last place.

Delete publication- will permanently remove the corresponding publication from the report.

Edit report's fields

In order to edit report's fields, the user should have the right permission and the report should be in one of its edit modes. New reports are automatically set to be in an edit mode.

Every editable field has in its vicinity an **edit** button marked as a pencil.

A field might also have in its vicinity a **hide** button marked as a strikethrough eye.

The **edit** button will open a dialog box with the current field content. After editing, click the **update field** button and the report will be saved with the changes. In case you would like to get back to the default content just clear the content and click the update field button.

The **hide** button will make the field name and content disappear from the report.

When a publication is added to the report it is presented in a box with several tabs. The front tab is called the custom tab and it is the only tab that except editable fields.

The fields in the custom tab are populated automatically with default content from the database.

4. My Reports page

In My Reports page you will find all the reports you can access sorted by date in a descending order.

Click a corresponding report line to open a report. The report mode will be determined by your permissions to access the report, for example, if you have an edit permission the report will be opened in its edit mode. You will be able to move to the other report available modes from the report page.

Use the arrows buttons to navigate through the list pages. You can also navigate to a specific page and choose the amount of reports to view per page.

Registered users can also create new reports by clicking the **New Report** button (not shown for non-registered users).

5. Report modes

The available features on the report page depend on the mode the report was opened in and the on the user permission.

There are 5 report modes:

- Subscribers Edit Mode
- Edit Mode
- Private View Mode
- Public View Mode
- Owner Mode

The table below summarizes the variety of features per report mode per user permission.

Report mode	Subscribers Edit mode	Edit mode	private view mode	public view mode
Available for	subscribers	subscribers & users	subscribers & users	subscribers, users & guests
View report	V	V	V	V
Navigate through patent tabs	V	V	V	V
Retrieve current legal status	V	V	V	V
Download whole report as PDF	V	V	V	V
Download each patent as PDF	V	V	V	V
Open each publication in a separate window.	V	V	V	V
Send a link to a friend				V
Invite to view	V	V	V	
Hide report logo	V	V	V	
Duplicate report	V	V	V	
Create new reports	V	V	V	
Add publications	V	V		
Reorder publications	V	V		
Edit custom tab fields	V	V		
Publish report that is owned by you	V	V		
Invite to edit	V			
Replace report logo	V			
Other advanced features	V			

The **Report Owner Mode** is the same as the editing modes except for the ability to change its sharing settings from private to public and vice versa. Report Owner Mode is available only for the report creator.

6. Patent literature numbers syntax (epodoc)

Patent numbers in **reporteditor** are displayed in the **epodoc format** followed by **kind code** in brackets, e.g. NL1016699 (C1) but you may enter any other format and the system will automatically try to convert it to the epodoc format.

The European Patent Office has created the "EPODOC" database, which introduce a strict number normalization or formatting, especially for application and priority numbers. Thus it is known as the epodoc format.

The number is in this format: CCNNNNNNNNNNNNK (KC)

Key:

CC: an ISO two-letter country code

NNN...: can be up to 12 digits, NO spaces

K: optional attached kind code one-letter

(KC): A latter followed by a number indicating the kind code of the document.

7. Simple and extended patent families

A patent family is a set of either patent applications or publications taken in multiple countries to protect a single invention by a common inventor(s) and then patented in more than one country. A first application is made in one country – the priority – and is then extended to other offices.

If there are several applications or publications for an individual invention (in other countries), claiming the same priority or priorities, we talk about a "patent family". All of these "family members" are related to one another by common priority numbers with associated priority dates

The term patent family can be defined in a number of ways, depending on the relationship between a patent document and its priority or priorities. In **reporteditor** we use the same definitions as in Espacenet for patent families.

Simple patent family

Simple patent family is defined as all the documents having exactly the same priority or combination of priorities.

If all the priorities of two documents are the same, they belong to the same simple family and they are referred to as "equivalents". This definition is used in **reporteditor** for listing the documents under "**also published as**" on the side bar in the publication tabs (the equivalents side bar is not shown on the custom tab).

Extended (INPADOC) family

All the documents directly or indirectly linked via a priority document belong to one patent family.

For a better understanding of the families definitions and how they differ from each other use the example below:

Document D1	Priority P1			
Document D2	Priority P1	Priority P2		
Document D3	Priority P1	Priority P2		
Document D4		Priority P2	Priority P3	
Document D5			Priority P3	
Document D6				Priority P4

In this case only D2 and D3 share the same simple family.

In this case only D1, D2, D3, D4 and D5 share the same Extended (INPADOC) family.

An important point when using any database to retrieve information on patent families is that there is never any guarantee that you will find all the corresponding patent documents that exist. Database producers do what they can to ensure completeness, but they can never guarantee it.

Source: <http://www.epo.org/searching/essentials/patent-families.html>

8. INPADOC legal status

Legal status data is data relating to events in the lifetime of a patent. The legal status data in **reporteditor** can give you a good indication of whether a patent is in force, has been abandoned, has expired or has changed ownership.

To access the legal status information select Legal (INPADOC) tab.

Like all other patent databases, INPADOC has to rely on the correctness of the data supplied by the co-operating patent offices and the extent to which that data is up to date. In particular, delays in the delivery of bibliographic or legal status data can vary significantly depending on the country concerned and the time period covered.

To be absolutely sure about the actual status of a patent, we recommend that you contact the relevant patent office or patent-granting authority direct.

Source: http://worldwide.espacenet.com/help?topic=legalstatusqh&locale=en_EP&method=handleHelpTopic

9. DOI- Digital Object Identifier

In **reporteditor** we recommend using DOI names, when available, in order to add a scholarly literature to the report. DOI is used by all the major scholarly literature publishers so you will be able to find a DOI for most of the scholarly literature you want to add.

In citing scholarly literature DOI is better than URL- A digital object identifier (DOI) is a character string (a "digital identifier") used to uniquely identify an object such as an electronic document. Metadata about the object is stored in association with the DOI name and this metadata may include a location, such as a URL, where the object can be found. **The DOI for a document is permanent and unique**, whereas its location and other metadata may change.

A DOI name takes the form of a character string divided into two parts, a prefix and a suffix, separated by a slash. For example, in the DOI name 10.1000/182, the prefix is 10.1000 and the suffix is 182. The "10." part of the prefix identifies the DOI registry, and the characters 1000 in the prefix identify the registrant.

DOI name can be found in a publication in its name format, e.g. **10.1000/182**, or in its resolving URL format, e.g. <http://dx.doi.org/10.1000/182>. This URL provides the location of an HTTP proxy server which will redirect to the correct online location of the linked item.

In **reporteditor** either format is acceptable as an input, name or resolving URL.

Reports display DOI in its resolving URL format so the viewer of a report is able to click the hyperlink and redirected to the correct online location of the publication.

More about DOI: http://www.doi.org/doi_handbook/1_Introduction.html

Source: http://en.wikipedia.org/wiki/Digital_object_identifier

DOI is registered trademarks of the International DOI Foundation (IDF).

10. Country codes

CC	Name
AL	Albania
AP	African Regional Industrial Property Organization
AR	Argentina
AT	Austria
AU	Australia
BA	Bosnia and Herzegovina
BE	Belgium
BG	Bulgaria
BR	Brazil
CA	Canada
CH	Switzerland
CL	Chile
CN	China
CO	Colombia
CR	Costa Rica
CS	Czechoslovakia (up to 1993)
CU	Cuba
CY	Cyprus
CZ	Czech Republic
DD	German Democratic Republic
DE	Germany
DK	Denmark
DZ	Algeria
EA	Eurasian Patent Organization
EC	Ecuador
EE	Estonia
EG	Egypt
EP	European Patent Office
ES	Spain
FI	Finland
FR	France
GB	United Kingdom
GC	Gulf Cooperation Council
GE	Georgia
GR	Greece
GT	Guatemala
HK	Hong Kong (S.A.R.)
HR	Croatia
HU	Hungary
ID	Indonesia
IE	Ireland
IL	Israel
IN	India
IS	Iceland
IT	Italy
JP	Japan
KE	Kenya
KR	Korea (South)
LI	Liechtenstein
LT	Lithuania
LU	Luxembourg

CC	Name
LV	Latvia
MA	Morocco
MC	Monaco
MD	Republic of Moldova
ME	Montenegro
MK	Former Yugoslav Republic of Macedonia
MN	Mongolia
MT	Malta
MW	Malawi
MX	Mexico
MY	Malaysia
NC	New Caledonia
NI	Nicaragua
NL	Netherlands
NO	Norway
NZ	New Zealand
OA	African Intellectual Property Organization
PA	Panama
PE	Peru
PH	Philippines
PL	Poland
PT	Portugal
RO	Romania
RS	Serbia
RU	Russian Federation
SE	Sweden
SG	Singapore
SI	Slovenia
SK	Slovakia
SM	San Marino
SU	Soviet Union (USSR)
SV	El Salvador
TJ	Tajikistan
TR	Turkey
TT	Trinidad and Tobago
TW	Taiwan
UA	Ukraine
US	United States of America
UY	Uruguay
VN	Viet Nam
WO	World Intellectual Property Organization (WIPO)
YU	Yugoslavia/Serbia and Montenegro
ZA	South Africa
ZM	Zambia
ZW	Zimbabwe