

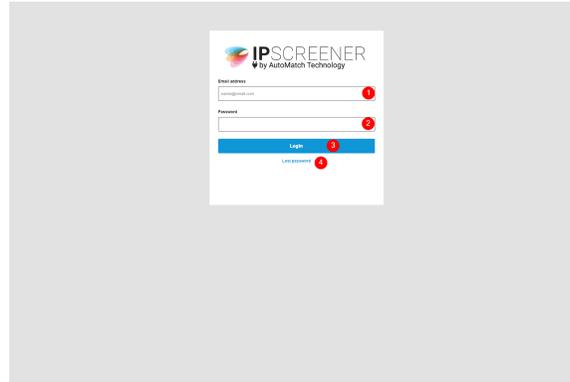
# Documentation

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This is the full documentation of the IPscreeener platform. Covering how to login, creating cases and much more. Written for version 2.7.0

## Login

Start by opening <https://my.ipscreeener.com/>

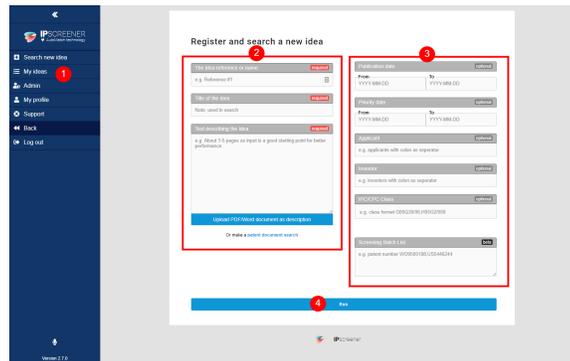


1. Enter E-mail.
2. Enter password.
3. When done, click arrow to enter the platform.
4. Use this if you've forgotten your password.

## Custom login portal

We can now set up your own custom login and registration page.

## Create idea



1. Click "Create Idea" in the right side menu.
2. Fill all fields with **required**.
  - a. The idea reference or name.
  - b. Title of the Idea.
  - c. Text describing the idea.
    - i. The more information you can give about your idea, the better your search will be.
    - ii. Possible to upload a .pdf or .doc-file instead of a manual search query.

- d. Patent document search.
  - i. This search is used to describe an idea based on already created patents using patent numbers instead.
- 3. Optional Fields (Advance search).
  - a. Publication date FROM and TO
    - i. Filters your search inside a specific time frame.
  - b. Priority date FROM and TO
    - i. Filters your search inside a specific time frame.
  - c. Applicant
    - i. Used to filter for specific Applicant. Each Applicant is separated by a comma ,
  - d. Inventor
    - i. Used to filter for specific Inventor. Each Inventor is separated by a comma ,
  - e. IPC/CPC [Class](#).
    - i. Use this to filter your search to a specific patent class. Each Class is separated by comma ,
  - f. Screening Batch List
    - i. This filters your search to a specific area or field of patents. Each patent is separated by comma ,
- 4. When done, click "run" to create your idea.



#### Info

2c and 2d. Supported languages are English, French, German and Japanese.

3f. Screening Batch List and 3d. Patent document search are restricted to 10 documents at max in a search.

We **DO NOT** use operators **AND**, **OR** in filter fields.

#### Good Example

**The idea reference or name;**

**Title of idea;** Solid-state drive

**Description of idea;**

"A solid-state drive (SSD) is a solid-state storage device that uses integrated circuit assemblies as memory to store data persistently, typically using flash memory. It is also sometimes called a solid-state device or a solid-state disk,[1] although SSDs lack the physical spinning disks and movable read-write heads used by the conventional electromechanical storage such as hard drives ("HDD") or floppy disks. [2]

Compared with the electromechanical drives, SSDs are typically more resistant to physical shock, run silently, and have quicker access time and lower latency.[3] SSDs store data in semiconductor cells. As of 2019, cells can contain between 1 and 4 bits of data. SSD storage devices vary in their properties according to the number of bits stored in each cell, with single bit cells ("SLC") being generally the most reliable, durable, fast, and expensive type, compared with 2 and 3 bit cells ("MLC" and "TLC"), and finally quad bit cells ("QLC") being used for consumer devices that do not require such extreme properties and are the cheapest of the four. In addition, 3D XPoint memory (sold by Intel under the Optane brand), stores data by changing the electrical resistance of cells instead of storing electrical charges in cells, and SSDs made from RAM can be used for high speed, when data persistence after power loss is not required, or may use battery power to retain data when its usual power source is unavailable.[4] Hybrid drives or solid-state hybrid drives (SSHds), such as Apple's Fusion Drive, combine features of SSDs and HDDs in the same unit using both flash memory and a HDD in order to improve the performance of frequently-accessed data.[5][6][7]

While the price of SSDs has continued to decline over time, SSDs are (as of 2018) still more expensive per unit of storage than HDDs and are expected to remain so into the next decade.

SSDs based on NAND Flash will slowly leak charge over time if left for long periods without power. This causes worn-out drives (that have exceeded their endurance rating) to start losing data typically after one year (if stored at 30 °C) to two years (at 25 °C) in storage; for new drives it takes longer.[8] Therefore, SSDs are not suitable for archival storage. 3D XPoint is a possible exception to this rule, however it is a relatively new technology with unknown data-retention characteristics.

SSDs can use traditional hard disk drive (HDD) interfaces and form factors, or newer interfaces and form factors that exploit specific advantages of the flash memory in SSDs. Traditional interfaces (e.g., SATA and SAS) and standard HDD form factors allow such SSDs to be used as drop-in replacements for HDDs in computers and other devices. Newer form factors such as mSATA, M.2, U.2, and EDSFF (formerly known as Ruler SSD[9])[10] and higher speed interfaces such as NVMe over PCI Express can increase performance over HDD performance.[4]"

**Bad Example**

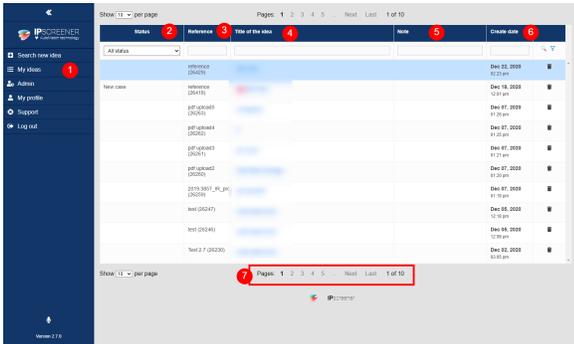
The idea reference or name; drive

Title of idea; Storage

Description of idea;

"A solid-state drive (SSD) is a solid-state storage device that uses integrated circuit assemblies as memory to store data persistently, typically using flash memory. It is also sometimes called a solid-state device or a solid-state disk,[1] although SSDs lack the physical spinning disks and movable read-write heads used by the conventional electromechanical storage such as hard drives ("HDD") or floppy disks.

**My idea overview**

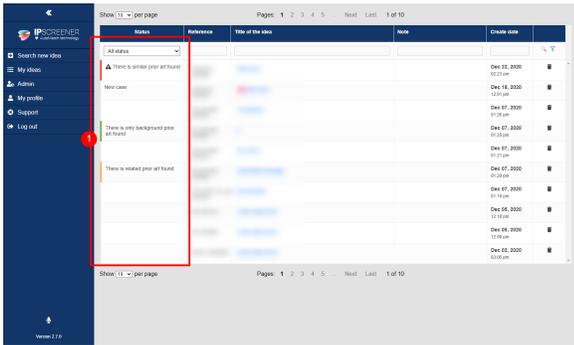


- 1. Click here to see all your ideas.
- 2. Show the status of your idea.

| a. Status text  | Description                                    |
|-----------------|--|
| Processing case | Case search in progress.                       |
| New case        | Case ready for viewing. First time you open it |

- 3. Here is the reference name for your idea.
- 4. Here is your Title of idea.
- 5. Notes about your case.
- 6. Show date and time for when you created the latest version of your idea.
- 7. Navigation arrows

**Idea Ranking**



- 1. When rankings are done in result page, Ideas gets colour coded and a text based on them.

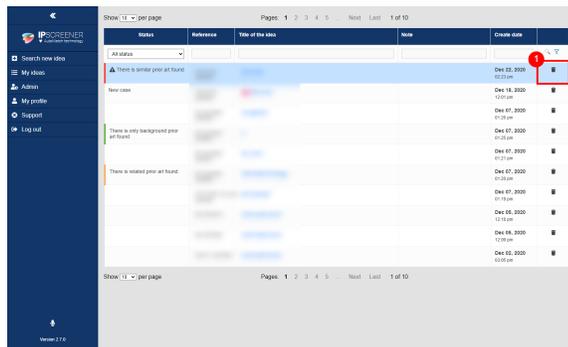
| Color          | Status text                               |
|----------------|---|
| Green          | There is only background prior art found. |
| Orange         | There is related prior art found          |
| Red            | There is similar prior art found.         |
| White/No color | <Blank>                                   |

## Delete Idea



### NOTE

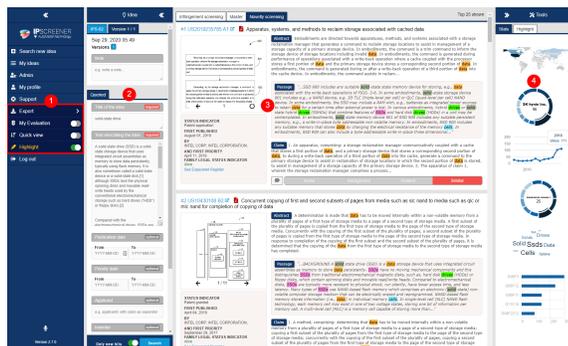
The function to be able to delete ideas is optional and can be disabled.



1. Select My Idea in the blue sidebar.
2. Click on the Bin icon, next to the case you want to delete.
3. Click Yes on the pop-up to confirm.

## Overview result page

Here you will see your search results and information about your project in detail.



1. Toolbox tab contains functions about your project for sorting, exporting etc.
2. Contains a summary of your current project version.
3. This tab contains all your search results from different patent indexes.
4. Statistics and Highlights.

# Toolbox functions

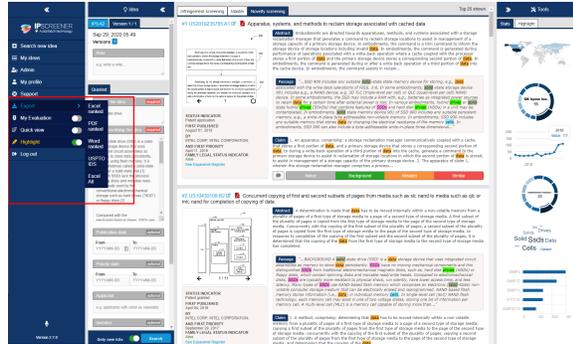
Here you will find everything related to the blue sidebar Toolbox functions

## Export function



Note

You need to make rankings in your search before using this function.



1. Click on export.
2. Choose what format you want to export to.
  - a. Excel ranked - Exports all ranked patents to a excel document.
  - b. PDF ranked - Exports all ranked patents to a pdf document.
  - c. Word ranked - Exports all ranked patents to a word document.
  - d. USPTOIDS - Export all ranked patents to a XML file.
    - i. Remember to unpack the zip file and open the .xdp-file. Read more [USPTO](#).
  - e. Excel all - Exports all patents from your search ranked or not.

Excel ranked - [result\\_ref\\_20594\\_exporddate\\_2020-02-19.xls](#)

Pdf - [result\\_ref\\_20594\\_exporddate\\_2020-02-19.pdf](#)

Word - [result\\_ref\\_20594\\_exporddate\\_2020-02-19.docx](#)

USPTOIDS - [IDS\\_ref\\_Lowtech Display\\_exporddate\\_2020-02-19.zip](#)

## My Evaluation



This is used to filter out patent based on your ranking of them.

1. First click on the ranking you want for the document.

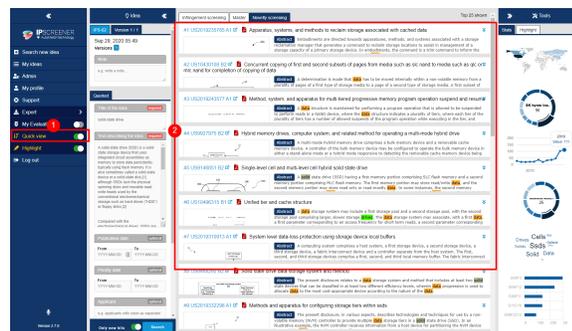
- a. Noise grey - not relevant to your idea.
  - b. Background green- only background information was retrieved.
  - c. Related orange - relevant prior art is present.
  - d. Similar red - indicates a match found.
2. Click on "my evaluation" to toggle it ON.
  3. Select filter based on rank.
    - a. E.g. Select unrated to see all unrated document in your search.
    - b. With the tool toggled OFF all documents will be visible regardless of ranking.

**Note**

Rankings you make will be visible across all versions.

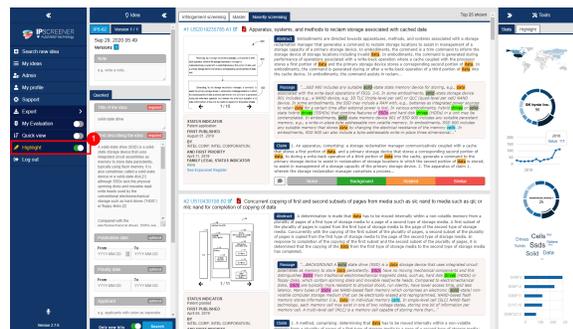
When this tool is active, quickview will be deactivated.

## Quick View



This function is used to show a more compact view of the results showing patent number and titles.

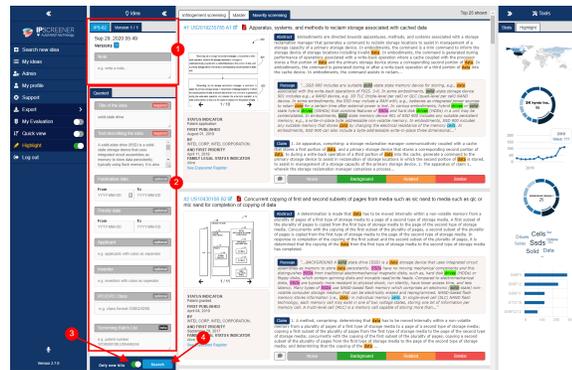
## Highlight Toggle



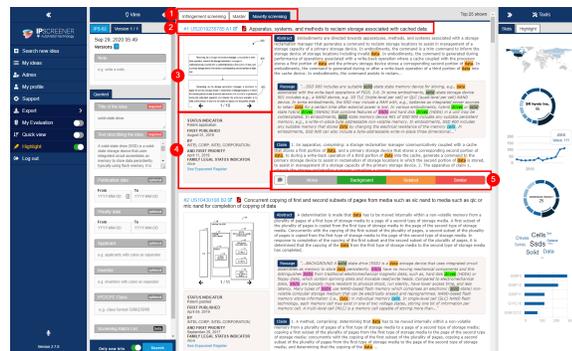
Used to toggle highlight function on and off. **Highlight.**

This tool can also be used in full size document view.

## Reference and Version tab

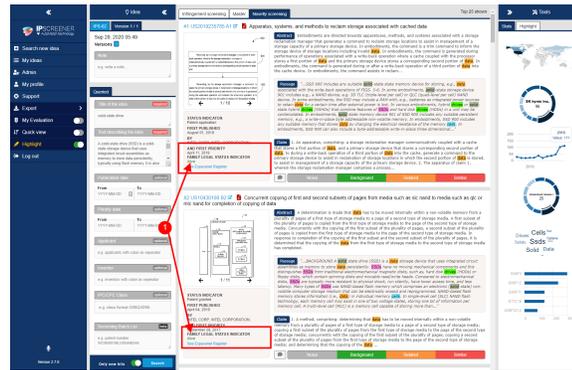


1. Here you can switch between different versions of your idea and add general notes about the project.
2. This data is imported from when you created your idea.
  - a. You can add, remove or make changes here, to take effect you need to run a new version.
3. "Show only new hits" -toggle is used to filter out result you have already seen.
  - a. Useful when you have added, removed or changed anything inside "Queried Tab".
  - b. If left toggled OFF you might not get any new hits on a new version.
  - c. If left toggled ON it filters out hits from previous versions.
4. Click "Search" when you want to do a new iteration.



1. Here you will see your different search index e.g Infringement screening, Master and Novelty screening.
2. Information about the patent number and title.
  - a. Click on the name (e.g #1US2014232994 A1 or ) to see a fullsize view of the document (will open a new window).
  - b. Click on Pdf  -icon to see original patent document or to download a copy. (will open a new window).
3. Displays first image of a patent. Click on it for an enlarged view.
  - a. Click on "black arrows" to load and see more images.
4. A summary for this specific patent document containing first published, by whom, patent classes and Family legal status indicator (If it's active).
  - a. To view the document on [Espacenet](#).
5. Use the comment button  to add comment or you can use the ranking system to easier filter out relevant patent documents in your search.
  - a. Click once to rank e.g. noise.
  - b. Click again on noise to remove a rank.

## Family legal status indicator \*



1. Display if a patent is Alive (green) or Dead (red).
2. Indicator are found on all patents grey info box under Family legal status indicator.
  - a. Also displayed in fullsize view as coloured text, under Family legal status indicator. See image below.



Note

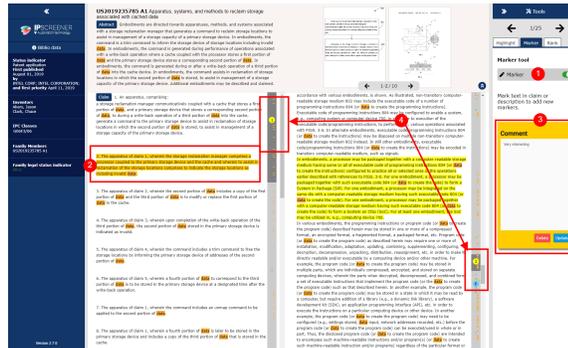
\*This is a premium feature

## Fullsize document overview



1. Contains all information about first published date, published by whom, first priority, Inventor, **classes**, **family members** and Family legal status indicator(Premium feature).
2. In this column you can read about abstract and find images for the document. It's also possible to hide this element by clicking on the grey arrow.
3. In this column you can read about Claim for this patent.
  - a. By default the document is zoomed into the most relevant paragraph identified, where that text passage is highlighted (Lightblue).
  - b. You can also click on the blue (P)-icon on the scroll bar to quickly navigate to that passage.
4. In this column you can read about Description for this patent.
  - a. By default the document is zoomed into the most relevant paragraph identified, where that text passage is highlighted (Lightblue).
  - b. You can also click on the blue (P)-icon on the scroll bar to quickly navigate to that passage.
5. Here you will find our toolbox, containing Highlight tool(Premium feature) and Ranking.
  - a. Highlight tool needs to be toggled on outside this view to be useble.
  - b. To see next/previous result, use the navigation arrows inside the Tools tab.

## Marker tool \*



1. Toggle Marker ON.
2. Click and drag on a section to mark it.
  - a. Orange background for selected marked passage.
  - b. Yellow background for all other marked passages.
3. Add a comment then click on save or update.
  - a. Click on Delete to remove marker.
4. A marker is added on your scroll bar when a new passage is marked. Click on it to jump to marker.



Note

\*This is a premium feature

## Extended Passage \*



With this feature active, the search engine goes through the document and highlights what it thinks are the 3 most relevant parts of a document.

1. Image shows 2 out of 3 highlighted parts.
2. An blue (P) on the scrollbar indicates where these passages are found.
  - a. Click on the blue (P) to quickly navigate to that passage.

 **Note**

\*This is a premium feature

## Stats Tab

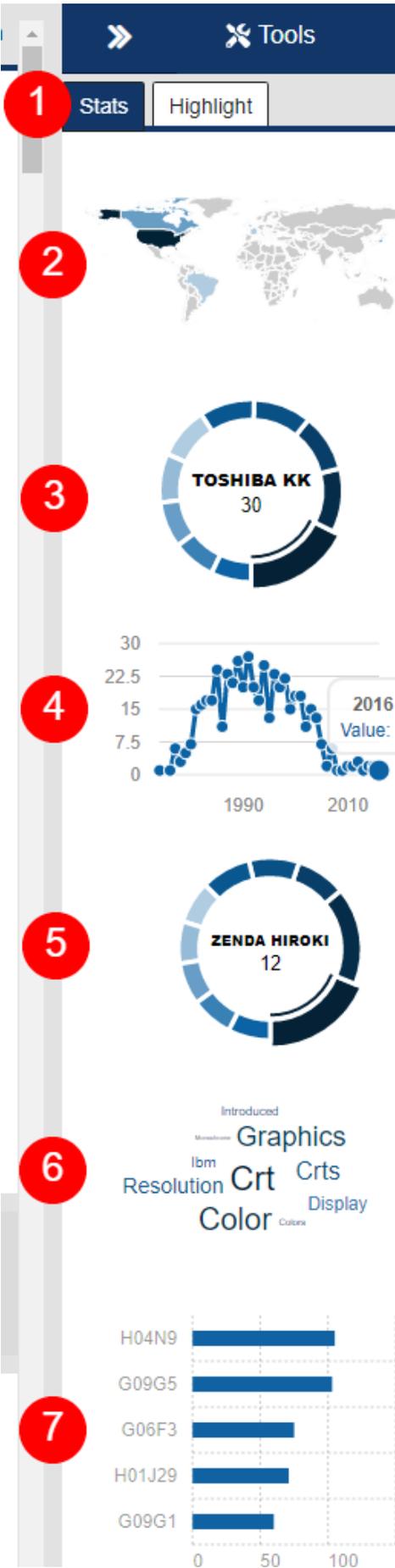
1. Click here to switch between Stats and Highlight tool.
2. Top countries where priority applications are filed.

| a. Colour  | Applicants |
|------------|------------|
| dark blue  | high       |
| light blue | low        |
| none       | few/none   |

3. Top patent applicants active in the technical field.
  - a. You can click on the different parts of the wheel to get more information about the different applicants.
  - b. E.g. IBM is the top applicant with 38 applications.
4. Distribution of Patent Application Priority dates.
5. Top Patent Inventor active in the Technical Field.
  - a. You can click on the different parts of the wheel to get more information about the different inventors.
6. A word cloud based on your text describing the idea.
  - a. Also used to create the default highlight profile.

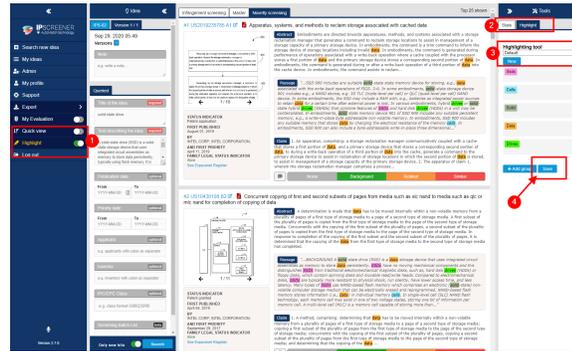
- b. Larger font reference a more common word in your result.
- 7. Top CPC Classes related to the Idea.
  - a. Click on a CPC/IPC class to show tooltips, inside enlarged view.

**Note**  
You can click on all images/graphs /wheels to see an enlarged view.



# Highlight Tool

## Create profile



1. Toggle highlight ON.
2. Open highlight (right side panel).
3. The tool comes with a pre-defined keyword profile called Default.
  - a. To create a custom profile press "new" and choose a profile name (eg. profile 1).
4. Click save.



### Info Default profile

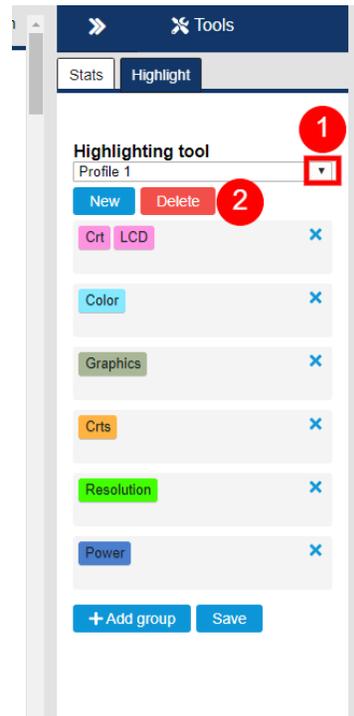
The Default keyword set can be saved to a new profile and then changed.

Highlight profiles are saved and can be used in multiple projects without having to create a new one everytime.

Highlights are also supported in fullsize document view.

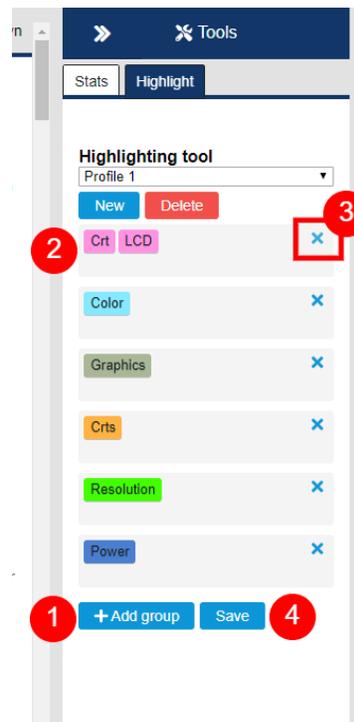
## Delete profile

1. Select the profile in the drop down menu.
2. Click "delete" to delete the selected profile.



## Adding and removing Keywords

1. Click "+Add group" button.
2. Fill in your keywords.
  - a. All keywords in the same group will have the same colour code.
  - b. You can also have multiple keywords in the same group.
  - c. You can create up to 10 different keyword groups.
3. To delete a keyword group, click x in the upper right corner.
  - a. To delete a specific keyword. Click on it and use "backspace" on your keyboard.
4. Click save when done adding or deleting groups.



## My Profile

Here you can change everything related to your user profile.

Required fields are:

- First and last name.
- Mobile phone.

## Default settings for result page.

Hit list – Filtes how many hits you will see in the result view , e.g. 10, 25, 50.

Idea list - Filtes cases you will see in My ideas per page, e.g. 10, 25, 50.

Quick view default – A more compact view of results.

Show only new hits default – Returns new search results only.

Extended family – Show extended family members in results.

Highlight default - Activate highlight tool.

Show only first version in report - Used to only export first version.

### Permium features:

Legal Status default - Shows if a patent is Alive/Dead.



#### Default settings

All settings are set to Off by default.

You need to relogg for changes to take effect.

## Change Password

1. Type in your current password.
2. Type in your new password.

- a. Remember to create a secure password with at least on capital letter and at least one number.
  3. Type in your new password again in verify password, they need to match.
  4. Click save to save changes.
- 

Unable to render {include} The included page could not be found.