

**DOCKETING SYSTEMS**  
**NAPP AMC 2015**  
**7/30/2016**

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Agent,  
Young's  
Patent  
Services

# GOAL OF THIS PRESENTATION

- Very Quick Overview of the Issues that need to be addressed by a Patent Practitioner/Firm when evaluating their Docketing Needs
- Highlight Systems for Typical Needs of Solo/Small Practice
- Backup Slides for Reference:

## Overview of Available Patent Docketing Systems

- The primary focus is on patent practice, but some trademark practice features will be mentioned.
- Several different docketing systems are described and compared.
  - A standard set of questions will be answered for each system, including costs, and then special features will be highlighted for the various systems.
  - Systems analyzed in detail include AppColl, DocketTrak, fileye, Flextrac IP CTS, and RevaTrademark.

# WHY WORRY?

- Unstructured Paper/Whiteboard/Stacks of Documents have been used for many years by many practitioners to keep track of deadlines
- No Additional Cost – Simple to Use – No Training Required!

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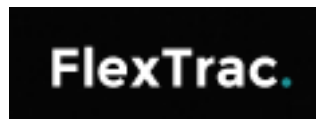
*What, Me Worry?*



# YOU SHOULD WORRY!

- *In re Tachner* (USPTO D2012-30)
  - Patent attorney; disciplinary complaint alleged:
    - Failed to report Office communications and docket due dates.
    - Apps. became abandoned; patents expired for failure to pay maint. fees.
    - Used handwritten docket book and “white board” for docketing USPTO due dates
    - later simple MS Word document was used
    - Staff was undertrained and underequipped.
  - Suspended from practice before USPTO for 5 years.

# ABUNDANCE OF CHOICES



# HOW TO DECIDE?

- Learn about the various types of solutions
- Understand the needs of YOUR Practice
- Evaluate solutions that might fit YOUR needs
- Decide on the best solution for YOUR Practice

# CLASSES OF SOLUTIONS

- **Five general classes of solutions**
  - **Service Providers:** Third-party service providers take ownership
  - **Ad-Hoc:** Aggregation of available tools to fulfill tracking needs
  - **Local Application:** Single computer or LAN solution
    - Managed by practitioner
  - **Hosted Database:** Data and equipment on- or off-site
    - Managed by practitioner
  - **Cloud-Based:** Data and equipment off-site
    - Managed by service provider



# CLASSES OF SOLUTIONS OUTSOURCE OR IN-HOUSE

## ■ Outsourcing

- Hire a Third Party to Manage Docket
- No Software to buy (usually)
- Several Third Party Companies offer Docketing Services
  - Black Hills IP [www.blackhillsip.com](http://www.blackhillsip.com)
  - Cardinal IP [www.cardinal-ip.com](http://www.cardinal-ip.com)
  - CPA Global [www.cpaglobal.com](http://www.cpaglobal.com)
  - Facets IP [www.facetsip.com](http://www.facetsip.com)
  - FlexTrac CTS <https://www.flextrac.com/#services>
- Little to No training required – They already understand the process

## ■ In-House

- Do it yourself?
- Hire/use untrained staff and train them?
- Hire/use an experienced paralegal?
- In a multi-practitioner office, designate one person or distribute responsibility?
- Probably requires investing in software

# CLASSES OF SOLUTIONS: THIRD PARTY SERVICE PROVIDERS

- **Description**
  - Wide range of provided services
    - Annuity payments
    - Docketing, including PAIR monitoring
    - Document preparation and filing: Applications, IDS
    - Patent preparation / prosecution; other paralegal
- **Advantages**
  - Total offloading of responsibility and liability
  - Strong guarantee of accuracy
- **Disadvantages**
  - Most expensive options
  - May only provide select pieces of the big picture
  - May have more rigid practices that don't conform to your processes
- **Client consent issues**
  - Commingling of information with information of other clients of the Service provider
  - Geographic distribution of data storage
  - Explicit third-party involvement and contact in docketing

# CLASSES OF SOLUTIONS: AD-HOC VS. PURPOSE-BUILT SYSTEMS

- Ad-Hoc System may be a combination of standard office software: e.g. Excel, Outlook, Google Calendar, home-brewed applications, paper, etc.
  - Advantages – Familiar Tools, No real additional cost, Completely “Customizable”
  - Disadvantages – Limited capabilities, Manual (and redundant) data entry and coordination, No accuracy guarantee, Maintenance heavy
- Purpose-Built Software
  - Advantages – Provides structure, Automated logic, task generation, and auto-calculation of deadlines, Integration with USPTO data and other systems
  - Disadvantages – Cost, Training, Not as customizable

# CLASSES OF SOLUTIONS: LOCAL APPLICATION

## ■ Description

- Data and business logic execute on a local computer
- Simply stores data in a local database
- Some are LAN-deployable, but not as robust as hosted database

## ■ Advantages

- Complete ownership and control of data
- Not prone to service / network outages

## ■ Disadvantages

- Often limited to a particular architecture (usually Windows)
- Requires installation of local client on machine
- Often limited to single-user model; major potential for data conflicts if single-user database is shared between machines
- Backup and disaster recovery are completely the practitioner's responsibility

# CLASSES OF SOLUTIONS: HOSTED DATABASE

## ■ Description

- Runs on a server that is accessed over a network (LAN or Internet)
- Typically accessed by software client installed on each device
- Locally hosted data can be coupled with remote backup

## ■ Advantages

- Centrally designed for multi-user access
- For locally hosted solutions, practitioner maintains control of data and equipment

## ■ Disadvantages

- For locally hosted solutions, practitioner owns/manages equipment
- Remotely hosted solutions are exposed to network / service outages
- Installation and maintenance of software clients on devices
- For all such solutions, practitioner manages data, including backup and disaster recovery

# CLASSES OF SOLUTIONS: CLOUD-BASED SERVICES

## ■ Description

- Equipment and data are hosted and managed by a Third Party
- Generally accessible through any browser
  - PC, MAC, Tablet, Smartphone all may be useable
  - Multiple simultaneous logins almost always available

## ■ Advantages

- “Turnkey” solution: Easiest deployment
- Centrally designed for multi-user access
- Guarantees of availability and accuracy
- No practitioner responsibility for managing data, including backup and disaster recovery (usually some level of local backup is supported, but may not allow for seamless recovery)

## ■ Disadvantages

- Least flexibility and control
- Highest vulnerability to network outages: No network = no data

## ■ Client consent issues

- Commingling of information with information of other clients of the service provider
- Geographic distribution of data storage (some providers guarantee U.S. storage)

**WHAT IS THE “RIGHT” ANSWER?**

# WHAT IS THE “RIGHT” ANSWER?

There is NO  
Single “RIGHT” Answer  
for all practices



# DOCKETING SYSTEM FACTORS: TYPE OF PRACTICE

- **Target User Base Practice Areas**
  - U.S. Patent Prosecution
  - International Patent Prosecution
  - Trademark Prosecution
  - Invention Management and Tracking
  - Portfolio Management, Analysis and Valuation
- **Portfolio Size / Volume, and Case Types**
  - Sole practitioner: Single User; Small Number of Cases of 1 or 2 Types
  - Small practice: Multi-user; Reasonably Large Set of Cases
  - Large / in-house practice: Multi-user; Large and Diverse Set of Cases
- **Number of people managing the data**
  - Solo Practitioner or single dedicated Docketing Clerk?
  - Multiple Practitioners and/or Paralegals all accessing and entering data?

# DOCKETING SYSTEM FACTORS: TOP-LEVEL CONSIDERATIONS

- Amount of “Hand-Holding” desired in docketing process
  - Automated vs manual event generation and date calculation
  - Pre-existing templates for various tasks
- IT Support Considerations
  - Equipment Ownership; Software Installation / Patching; Backup / Recovery
- Customization for existing workflows
  - Change the SW to match your workflow or change your workflow?
- Client Consent/Participation
  - Do you need/want your Clients to directly see their dockets?
  - Do you need to inform them of any potential security issues, comingling of data, geographic issues?
- Upfront Cost
  - One-Time License Fees, Computer Costs, Installation Costs, etc.
- Ongoing Costs
  - Ongoing License Fees, Networking Costs, Maintenance Fees, equipment repair/replacement, etc.

# DOCKETING SYSTEM FACTORS: OTHER CONSIDERATIONS

- **User Interface**
  - Intuitiveness
  - Access speed
  - Training requirements
- **Customizability**
  - Built-in flexibility (e.g., custom fields and/or docketing rules)
  - Add-on modules for future development
  - Custom module development
- **Scalability to larger / more diverse case load**
- **Patching and continued development**
- **Customer service responsiveness; bug reporting**

# DOCKETING SYSTEM FACTORS: FEATURES

- **Deadline Detection, Tracking, and Notification**
  - Automated (PAIR Integration) vs. Semi-Automated vs. Manual
- **Document Management and Versioning: Basic vs. Extensive**
- **Querying and Reporting: Basic vs. Extensive**
- **Invoicing**
- **Remote Access**
- **Prior Art Management and IDS Preparation**
- **Form Preparation: Client Letters, ADS, Assignment, Dec / POA**
- **Client Access / Notification**
- **IT Integration: Email Reminders; Store Email; Calendaring**
- **USPTO Integration (EFS-Web, PAIR, TEAS, searching)**
- **International Support**
- **U.S. / International Searching**

# DOCKETING SYSTEM FACTORS: OTHER FEATURES

- Other functions available in some systems
  - Outside counsel management
  - Cost tracking / budgeting
  - Portfolio tracking / clustering
  - Invention management and award tracking

# SYSTEMS WORTH CONSIDERING FOR SOLO/SMALL PRACTICE

- Cost Focused? Look at **DocketTrak**
  - Cloud-Based system with Good Capability
    - Highlight is ability to get data from Private PAIR
  - Lowest Cost Solution - \$75/mo for up to 5 Logins, Unlimited Cases
- Strong Feature Set Important? Look at **AppColl**
  - Cloud-Bases system with Very Strong Feature Set and Capabilities
    - Highlights Include:
      - Very Strong US Rule-Based Automatic Docketing and IDS Generation with Prior Art Tracking
      - Automatic Event Generation from USPTO e-mails
  - Reasonable Cost for 1<sup>st</sup> Login but Adds up Fast for Additional Logins
- Want Local Installation / No Monthly Cost? Look at **FlexTrac**
  - NAPP Member Discount
  - Installation on Local Machine Possible
    - Cloud Access or Remote Database Hosting also available
  - No Ongoing Fees Required after 1<sup>st</sup> year
    - But optional ongoing support/updates require an annual fee

# THANKS FOR YOUR ATTENTION!

- Backup Slides Provide More Detailed Information on Several Docketing Systems
- Feel free to contact me with additional questions
  - Or better yet, post questions to the NAPP Practice forum
- My Contact Info
  - Bruce Young
  - Patent Agent, USPTO Reg # 45656
  - Young's Patent Services
  - +1 (712) 541-9822
  - [bruce@youngspatentservices.com](mailto:bruce@youngspatentservices.com)

**BACKUP SLIDES**



# SYSTEMS EVALUATED

- **AppColl Prosecution Manager**
  - Discussed in 2014 & 2015 NAPP AMC presentation
  - Minor Upgrades Noted Since Last Year.
- **DocketTrak**
  - Discussed in 2014 & 2015 NAPP AMC presentation
  - Significant Upgrades Noted Since Last Year
- **Fileye**
  - Discussed in 2015 NAPP AMC
  - No Response from Supplier on New Features over the Last Year
- **Flextrac IP CTS**
  - Discussed in 2014 & 2015 NAPP AMC presentation
  - Significant Upgrades Noted Since Last Year
- **RevaTrademark**
  - Same Version Shipping as in 2014 NAPP AMC presentation

# OTHER DOCKETING SYSTEMS

- Here is a list of some other known docketing systems (not intended to be comprehensive!)
  - Lecorpio Patent Management
    - [www.lecorpio.com/products/patent-management/](http://www.lecorpio.com/products/patent-management/)
  - Foundation IP from CPA Global
    - <https://www.cpaglobal.com/ip-management-systems/#foundation-ip>
  - IPSS (Custom Software Solutions)
    - [www.ipss.com](http://www.ipss.com)
  - Anaqua
    - [www.anaqua.com/ip-practice-management-solution.html](http://www.anaqua.com/ip-practice-management-solution.html)
  - Patricia from Patrix
    - [www.patrix.com/ip-software](http://www.patrix.com/ip-software)
  - Patent Management System from ComputerPackages, Inc.
    - [http://www.computerpackages.com/patent\\_system.asp](http://www.computerpackages.com/patent_system.asp)

# MORE DOCKETING SYSTEMS

- DIAMSiQ from Dennemeyer
  - <http://www.dennemeyer.com/software-solutions/intellectual-asset-management-system-diams-iq/>
- WiNPAT from GSI
  - <https://www.gsi-office.de/en/index.php>
- PatraWin from Patrafee
  - <http://www.patrafee.com/ip-management-software/>
- PATTSY from OP Systems
  - <http://www.pattsy.com/products.html>
- DocketWizard from MAG Systems
  - <http://www.docketwizard.com>
  - Per Company: Look for Major Upgrade Later This Year

# LINKS TO OTHER LISTS OF IP SOFTWARE

- <http://www.usptotalk.com/docketing.html>
  - David Stein's Overview List from 2014
- <http://www.iplawlink.com/ipmenu/ipsoftware.htm>
- <http://www.patentlore.com/software/defaultB.htm>
- No Guarantee of how up-to-date these lists may be!

# QUESTIONS FOR EACH SYSTEM

- System Name and Company Contact Information
- Hosting Requirements
- Types of Matters Supported
- Licensing Terms (Cost)
- Date Calculation Capabilities
- Integration with USPTO Private PAIR Data
- Integration with other data sources
- Client Access Support
- Support for Tracking Cited References and IDS Generation
- Tracking Priority and Linked Cases
- Email Integration
- Form Letter Capabilities
- Document Management Capabilities
- Report Generation
- Other Key Features

# APPCOLL PROSECUTION MANAGER

## UPDATES SINCE 2015

- From AppColl Systems in San Mateo/Menlo Park, CA
  - [www.appcoll.com](http://www.appcoll.com)
  - Jeff Cashen, [sales@appcoll.com](mailto:sales@appcoll.com), (650) 223-5460
- Cloud-Based Solution Accessible from most browsers using SSL
  - Organized into Tasks, Matters, Prior Art, Files, Billing, Reports, and Contacts Tabs
  - Hosted in USA with all Storage backed up Daily in 2 US locations
- Support for US Patent (Utility, Design, Provisional, Reissue, Reexam, Plant), PCT, US Trademark built-in
  - Can create custom events/rules for other types (e.g. EPO Patent)
  - Very Good Support for tracking Priority and Related Applications
- Cost: \$100/mo - one user (single login) up to 200 matters
  - No Upfront Fee, Setup Fee, or long-term contract (month-to-month)
    - Free Demo Account Available
  - Additional logins: 2<sup>nd</sup> +\$100/mo, additional +\$50/mo
    - Additional logins include 200 additional matters each
    - No reduced cost for paralegals/support personnel
  - Additional matters without additional logins: \$25 per +200 matters

# APPCOLL (CONTINUED)

- **Automatic Date Calculation Included**
  - Fairly robust rule based calculations
  - User can change their rules calculations if desired
  - User can generate their own events and rules
- **USPTO Data**
  - Can import XML data from Private PAIR to populate or update Matter
    - .xml file manually downloaded from PAIR then manually uploaded to AppColl
  - Multiple .xml files can be zipped into a single file and uploaded in one operation – Very helpful for initial population of the database
  - Can be set up so that USPTO Private PAIR Correspondence Notification emails automatically trigger creation of a docketing event!
- **Other Data Sources**
  - Scrapes data from USPTO public resources, Google, and Espacenet
  - Retrieves Abstract, Cover Image, and Claims for Published Matters
  - Prior Art module auto-populates Inventor/Applicant and Filing Date based on patent/publication number for US, PCT, and foreign patent documents available on Espacenet

# APPCOLL (CONTINUED)

- AppColl does not support direct client access
  - They claim this is patented by someone else
- References and IDS Generation
  - There is a Prior Art module that can be used to track all art referenced for each matter
  - This is auto-populated for issued patents
  - References can also be manually entered
    - Indicate whether cited by Examiner, already provided in an IDS, or a new reference
    - Patent document data is populated based on number – no need to look up inventor and filing date
    - Can also include notes, URLs, and upload copies of the reference
    - Can tag references that do not need to be reported in an IDS
      - e.g. for PCT and Provisional applications
  - Can Directly Generate a PTO/SB/08a IDS form
    - Was .xml export before this upgrade
    - Can also download a .zip file with copies of any references that were uploaded for the references in this IDS



# APPCOLL (CONTINUED)

- Tracks priority from multiple cases with proper relationship
  - Can handle very complex networks of relationships
- Email Integration
  - System can automatically send a Daily Docket e-mail
  - Can manually send a report attached to an e-mail
  - Can send e-mails based on events
    - They are sent to the attorney/paralegal not directly to client.
    - They can then be forwarded to client as appropriate
    - Fully customizable content
    - Can also generate a calendar entry
- Form Letters
  - Can generate custom “form letters” populated with data from the database by matter, client, etc.
  - Manually Generated (not event based)
  - Form Letter created in Word, stored in .rtf format, then uploaded
  - Examples:
    - Amendment Template, Assignment, Custom Declaration

# APPCOLL (CONTINUED)

- Document Management
  - Any type of file can be manually uploaded and stored in the system
    - Multiple files can be zipped and uploaded as a single task with directory structure maintained
  - Files can be associated with a matter, a reference, a task, etc.
  - No integration with Cloud Based Storage Services such as Dropbox, Box, Google Drive
- Report Generation
  - Data in a tab can be filtered/sorted based on any field
  - Report can be generated from the filtered/sorted data and exported as a pdf or a .csv file
- Other Key Features
  - Time tracking and Billing Module included
  - Can Directly Generate Several USPTO pdf forms including ADS, Declaration, RCE, and Provisional Cover Sheet
    - Was .xml export before this upgrade
  - Can Add Custom Fields
  - Can upload multiple files in a single .zip file for convenience
  - Extensive Help system including video tutorials
  - Many small usability improvements since 2015

# APPCOLL SCREEN SHOTS

The screenshot displays the AppColl web application interface. The browser address bar shows the URL <https://s2.appcoll.com/Matters.aspx>. The application header includes the AppColl logo, navigation tabs for Tasks, Matters, Prior Art, Files, Billing, Reports, and Contacts, and a search bar for 'View Matter'. The main content area is titled 'Matters (11)' and displays a table of patent matters. The table has columns for 'Links', 'AttorneyRef', 'Title', 'Type', 'Client', and 'FirstInventor'. The 'Links' column contains icons for document, folder, and currency. The 'AttorneyRef' column contains alphanumeric identifiers. The 'Title' column contains descriptions of missed telephone call management and portable multifunction devices. The 'Type' column contains categories like 'Utility: Provisional', 'Utility: Non-Provisional', and 'Utility: PCT'. The 'Client' column lists 'Apple, Inc.' and 'Steven P. Jobs'. The 'FirstInventor' column lists '8,014,760 B2', 'Scott Forstall', and 'Steven P. Jobs'. The interface also includes a sidebar with 'Make Changes' and 'Change View' sections, and a footer with 'Young Demo - Permissions: Account Administrator', '© 2014 AppColl, Inc.', and 'Service Agreement • Privacy Policy'.

Make Changes	Links	AttorneyRef ▲	Title	Type	Client	FirstInventor
<input type="checkbox"/>		0347210	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: Provisional	Apple, Inc.	8,014,760 B2
<input type="checkbox"/>		P4305US1/63266-5055-US	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: Non-Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305USC1/63266-5459US	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: Non-Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305USC2/63266-5767US	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: Non-Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305USC3/106842084003	Missed Telephone Call Management for a Portable Multifunction...	Utility: Non-Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305USD1/63266-5278US	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: Non-Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305USP1/63266-5055PR	Telephone call management for a portable multifunction device	Utility: Provisional	Apple, Inc.	Scott Forstall
<input type="checkbox"/>		P4305WO1/63266-5055WO	MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION...	Utility: PCT	Apple, Inc.	
<input type="checkbox"/>		P4313USP1/063266-5063PR	Portable Multifunction Device	Utility: Provisional	Apple, Inc.	Steven P. Jobs
<input type="checkbox"/>		P4313USP2/63266-5063P1	Portable multifunction device	Utility: Provisional	Apple, Inc.	Steven P. Jobs
<input type="checkbox"/>		P4313USP3/63266-5063P2	Portable multifunction device	Utility: Provisional	Apple, Inc.	Steven P. Jobs

List of Patents

# APPCOLL SCREEN SHOTS

The screenshot displays the AppColl web application interface. The browser address bar shows the URL: <https://s2.appcoll.com/MatterDetails.aspx?id=2>. The application header includes the AppColl logo, navigation tabs (Tasks, Matters, Prior Art, Files, Billing, Reports, Contacts), and a search bar. The main content area is titled "P4305US1/63266-5055-US Matter Details" and is divided into "Bibliographic Data" and "Abstract & Claims" sections.

**Bibliographic Data:**

- Title: MISSED TELEPHONE CALL MANAGEMENT FOR A PORTABLE MULTIFUNCTION DEVICE
- Attorney Ref: P4305US1/63266-5055-US
- Attorney: Bruce Young
- Paralegal: [Empty]
- Client: Apple, Inc.
- Assignee: [Empty]
- Country: United States
- Type: Utility: Non-Provisional
- Status: Issued
- Priority Date: 9/6/2006
- Planned Filing: [Empty]
- Filing Date: 6/27/2007
- Official Filing Date: [Empty]
- Publication Date: 3/6/2008
- Allowance Date: [Empty]
- Issue Date: 9/6/2011
- Expiration Date: [Empty]
- Conf #: 5270
- App #: 11/769,694
- Pub #: 20080057926
- Pat #: 8,014,760
- PTA: [Empty]

**USPTO Status:** 2011-08-17 Patented Case (150)

**Connections:**

- P4313USP3/63266-5063P2 (US 60/879,469 1/8/2007 Priority Application)
- P4313USP2/63266-5063P1 (US 60/879,253 1/7/2007 Priority Application)
- P4305USP1/63266-5055PR (US 60/883,782 1/6/2007 Priority Application)
- P4313USP1/063266-5063PR (US 60/824,769 9/6/2006 Priority Application)

**Inventors:**

- Scott Forstall
- Greg Christie
- Scott Herz
- Imran Chaudhri

**Related Matters:**

- 0347210 (how)
- P4305US1/63266-5055-US
- P4305USC1/63266-5459US (how)
- P4305USC2/63266-5767US (how)
- P4305USC3/106842084003 (how)
- P4305USD1/63266-5278US (how)
- P4305USP1/63266-5055PR (how)
- P4305WO1/63266-5055WO (how)
- P4313USP1/063266-5063PR (how)
- P4313USP2/63266-5063P1 (how)
- P4313USP3/63266-5063P2 (how)

**Task List:**

Del	Task Status	Task Type	Comments	RefDate	RespondBy	FinalDue
	Open	Pay Final Maintenance Fee - 1st Deadline		9/6/11	3/6/23	9/6/23
	Open	Pay 2nd Maintenance Fee - 1st Deadline		9/6/11	3/6/19	9/6/19
	Open	Pay 4th Maintenance Fee - 4th Deadline		9/6/11	3/6/15	9/6/15

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## Patent Information

# APPCOLL SCREEN SHOTS

AppColl Tasks Matters Prior Art Files Billing Reports Contacts

Logout Bruce Young  
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Send us a comment or question  
Frequently Asked Questions

Back to P4305US1/63266-5055-US Matter... All Open Tasks (17 of 142)

Make Changes	Links	TaskStatus	Matter	TaskType	RespondBy	FinalDueDate	Owner	DeadlineType	Docume
<input type="checkbox"/>		Open	P4305USC3/106842084003	Respond to Non-Final Office Action - Final Deadline	5/1/14		Bruce Young	Hard External Deadline	
<input type="checkbox"/>		Open	0347210	File Non-Provisional Application	6/14/14		Bruce Young	Hard External Deadline	
<input type="checkbox"/>		Open	P4305USC1/63266-5459US	File Broadening Reissue Application	8/28/14		Bruce Young	Hard External Deadline	
<input type="checkbox"/>		Open	P4305USC3/106842084003	File Request for Redacted Publication	9/28/14		Bruce Young	Hard External Deadline	
<input type="checkbox"/>		Open	P4305US1/63266-5055-US	Pay 1st Maintenance Fee - 1st Deadline	3/6/15	9/6/15	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC2/63266-5767US	File Broadening Reissue Application	5/28/15		Bruce Young	Hard External Deadline	
<input type="checkbox"/>		Open	P4305USD1/63266-5278US	Pay 1st Maintenance Fee - 1st Deadline	9/13/15	3/13/16	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC1/63266-5459US	Pay 1st Maintenance Fee - 1st Deadline	2/28/16	8/28/16	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC2/63266-5767US	Pay 1st Maintenance Fee - 1st Deadline	11/28/16	5/28/17	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305US1/63266-5055-US	Pay 2nd Maintenance Fee - 1st Deadline	3/6/19	9/6/19	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USD1/63266-5278US	Pay 2nd Maintenance Fee - 1st Deadline	9/13/19	3/13/20	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC1/63266-5459US	Pay 2nd Maintenance Fee - 1st Deadline	2/28/20	8/28/20	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC2/63266-5767US	Pay 2nd Maintenance Fee - 1st Deadline	11/28/20	5/28/21	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305US1/63266-5055-US	Pay Final Maintenance Fee - 1st Deadline	3/6/23	9/6/23	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USD1/63266-5278US	Pay Final Maintenance Fee - 1st Deadline	9/13/23	3/13/24	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC1/63266-5459US	Pay Final Maintenance Fee - 1st Deadline	2/28/24	8/28/24	Bruce Young	Extendable External Deadline	
<input type="checkbox"/>		Open	P4305USC2/63266-5767US	Pay Final Maintenance Fee - 1st Deadline	11/28/24	5/28/25	Bruce Young	Extendable External Deadline	

Young Demo - Permissions: Account Administrator © 2014 AppColl, Inc. Service Agreement • Privacy Policy 100%

List of Tasks and Events

# APPCOLL SCREEN SHOTS

The screenshot displays the AppColl web application interface. The browser address bar shows the URL <https://s2.appcoll.com/TaskTypeDetails.aspx?id>. The application header includes the AppColl logo and navigation tabs for Tasks, Matters, Prior Art, Files, Billing, Reports, and Contacts. The current page title is "Update Task Type: File Appeal Brief - 2 Month Deadline".

On the left side, there are buttons for "Save", "Cancel", "Save & Add", "Save & Duplicate", and "Apply Changes".

The main configuration area includes the following settings:

- Response Date:** Use the triggering task closed-on date (dropdown) and Use this date only (dropdown).
- Offset By:** 2 months and 0 days.
- Final Deadline Offset:** 6 months and 0 days, with an option for "On last day of month".
- Email Reminders:** Sent to task owner. Days before (1-6), Weeks before, and Months before are all checked. There is an option to "Enable email reminders for this task type" and a note: "After first including this task type in a daily reminder email, include it in every subsequent daily reminder email until task is complete. All tasks, regardless of deadline type, will generate a reminder on the day the response is due if email reminders are enabled".
- Completion States:** Completed, Missed (with a note: "Comma separated list, put most common state first").
- Auto Close State:** (dropdown) with a note: "Automatically close any past due tasks of this type and set to this state (leave blank to disable)".
- Notifications:** An "Add" button and a note: "Press the add button to create a notification to be sent whenever an task of this type is generated, either manually or automatically".
- Trigger Events:** A table with three rows:

<input type="checkbox"/>	When a 'File Notice of Appeal' task completes with the 'Completed' state
<input type="checkbox"/>	OR when a 'File Notice of Appeal - 2 Month Deadline' task completes with the 'Completed' state
<input type="checkbox"/>	OR when a 'File Notice of Appeal - 3 Month Deadline' task completes with the 'Completed' state

At the bottom of the page, there is a footer with "Young Demo - Permissions: Account Administrator", "© 2014 AppColl, Inc.", and "Service Agreement • Privacy Policy". The browser status bar shows "100%".

## Date Calculation Setup

# APPCOLL DAILY EMAIL

AppColl Task Response Reminder - Message (HTML)

File Message gSyncit

Ignore X Junk Delete Reply Reply All Forward Meeting More

Greenwave To Manager Done

Team E-mail Reply & Delete Create New

Rules OneNote Mark Unread Categorize Follow Up

Find Related Select Zoom

From: AppColl on behalf of Bruce A Young <appcoll@appcoll.com> Sent: Tue 7/1/2014 12:15 AM

To: Bruce A Young

Cc:

Subject: AppColl Task Response Reminder

Dear Bruce A Young,

This is an automated email to remind you that the following tasks owned by you are due for a response:

RespondBy	Days	FinalDueDate	Client	Matter	Task	Comments	DeadlineType
Sun 7/6/14	5				File Foreign Application		Hard External Deadline
Tue 7/29/14	28				Respond to Non-Final Office Action - Final Deadline	Non Final Action Mailed (41) Mail Non-Final Rejection	Hard External Deadline
Fri 8/1/14	31	Fri 8/1/14			File Supplemental IDS		Extendable External Deadline
Mon 9/1/14	62				EPO: Confirm response to Notice of Intention to Grant		Hard External Deadline

Regards,

Bruce A Young  
AppColl Account Administrator

See more about: AppColl on behalf of Bruce A Young.

# DOCKETTRAK – UPDATES SINCE 2015

- From Decision Design Corporation in Illinois
  - [www.docketTrak.com](http://www.docketTrak.com)
  - Monty Davis, [jmd@decisiondesign.com](mailto:jmd@decisiondesign.com), 847-607-1959
- Cloud-Based Solution Accessible from most browsers using SSL
  - Main Views are Docket, Matter List, and Individual Matter
  - Hosted in USA with Storage/Backup in USA using Amazon Web Services
- Targeted to US Patent (Utility, Design, Provisional, Plant), US Trademark
  - Can designate other jurisdictions such as PCT (WIPO), EPO, and other countries or states, but fields are oriented to US Patents
  - Looking at improving non-US support
  - Also has support for Contracts, Copyrights and Domain Names
- Cost: \$75/mo – Up to 5 logins, unlimited matters
  - \$100/mo for 6-15, \$250/mo for unlimited logins
  - Contracts Module an additional \$25/mo (?)
  - No Upfront Fee, Setup Fee, or long-term contract (month-to-month)
    - Free Demo Account Available



# DOCKETTRAK (CONTINUED)

- **Automatic Date Calculation Included**
  - Much Improved date calculation capabilities compared with 2014
  - Standard Auto-Docket Templates available for many prosecution situations – More coming over time
    - Can be triggered from USPTO Private PAIR notification emails.
    - Currently includes a basic set of templates for US patent and trademark prosecution.
  - Users can create their own Auto-Docket Templates for events not included in the provided templates
    - Can also be set up to generate a set of docket items based on a particular event (e.g. file an IDS within 3 months of receiving a search report)
  - If no template has been created, you will need to manually generate your own events and date calculations for that situation.
  - Still not as powerful as some other systems but seems useable

# DOCKETTRAK (CONTINUED)

## ■ USPTO Data

- Can be set up so that USPTO Private PAIR Correspondence Notification emails automatically trigger creation of a docketing event! (or even creation of a new matter)
- Can import XML data from Private PAIR to populate or update Matter
  - .xml file manually downloaded from PAIR then manually uploaded to docketTrak

## ■ Automated Private PAIR downloads

- Separate application runs on user's machine
  - Uses the USPTO PKI Certificate to log into Private PAIR and download .xml data for each application, which it then uploads to DocketTrak
  - Certificate never leaves the user's machine
- Can be run manually or set up to run automatically (e.g. daily)
- Will be included in base subscription (no added cost)

## ■ Also can scrape Public USPTO data for Trademarks

- Automatic Daily Updates of Trademark data from USPTO

# DOCKETTRAK (CONTINUED)

- No Connection to other Patent Data Sources
  - Does have links to US Copyright office for Copyrights and WHOIS database for Domains
- Direct Client Access is supported
  - Just create a login for them and limit them to see only their own cases
  - Unlimited client logins at all subscription levels
- No support for tracking references and IDS generation
  - Now saying no plans to add this
- No way to directly track priority/benefit between cases
  - Can assign a family ID to each case
  - Planning on adding capability here later this year
- Email Integration
  - System can automatically send a Customizable Daily Docket e-mail
- Form Letters (DocketForms)
  - Now can generate form letters using Word Templates with mergefields
  - Will be adding feature to automatically generate and send form letters based on USPTO Status change

# DOCKETTRAK (CONTINUED)

## ■ Document Management

- Can upload files to be attached to individual matters

## ■ Report Generation

- Can filter/sort on many of the fields and export to .xls

- Improved since 2015

- Docketing report available in Word or Excel Format

## ■ Other Key Features

- Has a feature to “edit” fields in multiple patents at once
- Can store and display Trademark images
- Can bulk import Trademark and Patent Records in Excel Format
- Can bulk import the .xml file from a customer number from PAIR, not only a single patent

- iOS app available in the Apple App Store

- Adding integration with Clio (general law practice management SW) this fall

- The company has been very responsive to feedback and has continued to upgrade functionality over the last two years.

# DOCKETTRAK SCREEN SHOTS

The screenshot displays the DocketTrak web application interface. At the top, there is a navigation bar with the DocketTrak logo and the tagline "never forget ...". To the right of the logo is the NAPP logo (The National Association of Patent Practitioners) and a link for "Clients: 3 Bruce Young logout".

Below the navigation bar is a "Patent View" section with a dropdown menu set to "Patent View" and "Records Found: 6".

The main area contains a search and filter interface with various input fields for Reference #, Title, Application #, Client, Type, Country, Inventor, Family Id, Patent #, Status, Next Event, Event Date, Atty of Record, and Comments. There are also buttons for "Perform Search", "Clear All", "Edit Multiple", and "Create: Select Type:".

Below the search interface is a table listing patents with the following columns: All / None, Reference #, Client, Title, Country, Application #, Application Type, USPTO Status, Patent Number, Attorney of Record, Family Id, Status, Event, and Event Date.

All / None	Reference #	Client	Title	Country	Application #	Application Type	USPTO Status	Patent Number	Attorney of Record	Family Id	Status	Event	Event Date
<input type="checkbox"/>	<a href="#">DD2</a>	Decision Design	METHOD FOR DOCKETING IP RECORDS	United States	12/546,937	Utility	Patented Case	7635369	Michael Borman,		Active	3 1/2 Year Maintenance Fee Due 3 1/2 Year Maintenance Fee Grace Period 7 1/2 Year Maintenance Fee Due 7 1/2 Year Maintenance Fee Grace Period 11 1/2 Year Maintenance Fee Due 11 1/2 Year Maintenance Fee Grace Period Patent Expires	06/21/2014 12/21/2014 06/21/2018 12/21/2018 06/21/2022 12/21/2022 12/19/2030
<input type="checkbox"/>	<a href="#">DUM-001</a>	Dummy Corp.	Method to Cover a Rabbit Hole from Alice	United States	62000000	Provisional					Active		
<input type="checkbox"/>	<a href="#">DUM-002</a>	Dummy Corp.	Abstract Rabbit Food	United States	61999999	Provisional					Lapsed		
<input type="checkbox"/>	<a href="#">DUM-003</a>	Dummy Corp.	Abstract Rabbit Food Applied	United States	14999999	Utility					Active	Response to Office Action	06/30/2014
<input type="checkbox"/>	<a href="#">RAD-003</a>	Radiosophy		United States		Utility		7756497					
<input type="checkbox"/>	<a href="#">RAD-004</a>	Radiosophy		United States		Utility							

At the bottom of the interface, there is a footer with "Future Dockets: 3 Records: 7" on the left and "Copyright © 2014 Decision Design Corporation DocketTrak® software Version 4.4" on the right. A red box highlights the text "Current System has more fields available for Filtering/Searching than shown".

List of Patents & Filtering for Report Generation

# DOCKETTRAK SCREEN SHOTS

**Patent Details**

Save Save & Copy Cancel Delete History USPTO Templates Settings Users Clients Utilities Account

**General**

Client Name: Decision Design [add](#) [view](#)

Reference Number: ABC-123 Country: United States

Title: A test

**Docketing** **Note: Patent Expiration Calculation**

Status: Awaiting Examiner Review [add](#) Status Date: 05/05/2015 Active: Yes

Auto Docket Template: <Select Template> [Generate Dockets](#)

Docketing Event(s)	Event Date(s)	Done?
Expect Receipt of Filing Receipt	03/25/2015	<input checked="" type="checkbox"/>
Respond to Office Action - CTNF	07/01/2015	<input type="checkbox"/>
File IDS	08/05/2015	<input type="checkbox"/>
Final Response to Office Action	10/01/2015	<input type="checkbox"/>

**Patent Details**

Application Type: Utility

Application Number: 12/345678

USPTO Status Code:

Publication Sequence Number:

Patent Number:

Patent Term Adjustment:

Family ID:

US Class:

Application Filing Date: 03/04/2015

Earliest Priority Filing Date (if applicable): 03/04/2015

Effective Filing Date (if applicable):

USPTO Status Date:

USPTO Status:

Publication Date:

Publication Kind Code:

Date Granted:

[View at Patent Office](#)

Subclass:

International Class:

Abstract:

**Miscellaneous**

Primary Examiner:

Confirmation Number:

Attorney/Agent:

Attorney Docket Number:

Foreign Agent: Foreign Reference Number:

Inventor(s):

Assignee:

Comments:

**e-Office Action History**

No Office Actions have been imported for this Patent.

**USPTO Transaction History**

No Transaction History has been imported for this Patent.

**File Attachments**

Attachments: [add](#)

Description	File Type	Source File
-------------	-----------	-------------

Patent Information

# DOCKETTRAK SCREEN SHOTS

The screenshot displays the DocketTrak web application interface. At the top, there is a navigation bar with the DocketTrak logo and the tagline "never forget ...". To the right, there is a logo for NAPP (The National Association of Patent Practitioners) and a user profile for Bruce Young with a "logout" link. Below the navigation bar, there is a "My Dockets" section with a "View" dropdown set to "My Dockets" and a "Date Filter" dropdown set to "Next 45 Days".

The main content area features a search and filter section with various input fields and dropdown menus. Below this is a table of docketing events. The table has the following columns: All / None, Event Date, Docketing Event, Reference Number, Description/Title, Country, Client, Status, and Status Date. Three events are listed:

All / None	Event Date	Docketing Event	Reference Number	Description/Title	Country	Client	Status	Status Date
<input type="checkbox"/>	06/09/2014	Section 8 Declaration End	DD1	DOCKETTRAK	US	Decision Design	Registered	06/06/2013
<input type="checkbox"/>	06/21/2014	3 1/2 Year Maintenance Fee Due	DD2	METHOD FOR DOCKETING IP RECORDS	US	Decision Design	Active	06/06/2013
<input type="checkbox"/>	06/30/2014	Response to Office Action	DUM-003	Abstract Rabbit Food Applied	US	Dummy Corp.	Active	

At the bottom of the page, there is a footer with "Future Dockets: 3" and "Records: 7" on the left, and "Copyright © 2014 Decision Design Corporation" and "DocketTrak® software Version 4.4" on the right. A red box highlights the text "Current System has more fields available for Filtering/Searching than shown".

List of Docketing Events

# DOCKETTRAK SCREEN SHOTS

List of Current Auto-Docketing Templates (2015)  
Some Improvement for 2016 not shown

**DocketTrak** never forget ...

Template View View: [Select view]

Perform Search Clear All Edit Multiple Create: [Select Type] Templates Settings Users Clients Utilities Account

Name: [ ] Active: [ ] Type: [ ] Auto: [ ] IP Type: [ ] Country: [ ]

Client: [ ] Date Calculated From: [ ]

All / None	ID	Template Name	Active	Type	Auto	IP Type	Country	Client	Date Calculated From	Events	Created By	Updated By	Last Updated
<input type="checkbox"/>	1384	<a href="#">Application Filing Receipt</a>	Active	Standard		Patent	United States		Application Filing Date - Provisional	1	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1386	<a href="#">Ex Parte Quayle Action</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1390	<a href="#">Final Rejection</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1392	<a href="#">Issue Notification</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	1	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1388	<a href="#">Non-Final Rejection</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1439	<a href="#">Non-Provisional Filing</a>	Active	User		Patent	United States		Application Filing Date - Non-Provisional	2	Bruce Young	Bruce Young	06/24/2015
<input type="checkbox"/>	1391	<a href="#">Notice of Allowance and Fees Due</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak		06/15/2015
<input type="checkbox"/>	1393	<a href="#">Notice of Omitted Items Application</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1389	<a href="#">Notice to File Corrected Application Papers</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1387	<a href="#">Notice to File Missing Parts</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1383	<a href="#">Office Action</a>	Active	Standard		Trademark			Status Date	1	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1382	<a href="#">Patent Expiration</a>	Active	Standard	Auto	Patent	United States		Patent Expiration Date	1	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1379	<a href="#">Post Grant</a>	Active	Standard	Auto	Patent	United States		Grant Date	9	DocketTrak	DocketTrak	06/06/2015
<input type="checkbox"/>	1380	<a href="#">Post Registration - Principal</a>	Active	Standard	Auto	Trademark	United States		Registration Date	6	DocketTrak		06/06/2015
<input type="checkbox"/>	1381	<a href="#">Post Registration - Supplemental</a>	Active	Standard	Auto	Trademark	United States		Registration Date	6	DocketTrak		06/06/2015
<input type="checkbox"/>	1438	<a href="#">Receive Search Report</a>	Active	User		Patent	United States		Status Date	1	Bruce Young	Bruce Young	06/24/2015
<input type="checkbox"/>	1385	<a href="#">Requirement for Restriction/Election</a>	Active	Standard		Patent	United States		e-Office Action Mailroom Date	2	DocketTrak	DocketTrak	06/06/2015



# DOCKETTRAK SCREEN SHOTS

**DocketTrak**®  
never forget ...

Clients: 1  
Bruce Young  
[logout](#)

### Patent Template Details (Standard)

[Save](#) [Create Copy](#) [Cancel](#) [Templates](#) [Settings](#) [Users](#) [Clients](#) [Utilities](#) [Account](#)

#### Auto Docket Setup

Name:   Active

Auto Execute

- Use this template to automatically generate events when importing from an Excel file, a USPTO XML file, or the USPTO button
- Use this template to automatically generate events after a receipt of a patent e-Office Action email

#### Rules

Date Calculated From

Docketing Event:	First Event After:	Date Calculated From	Repeat After:	Repeat Count:	Adjust For Weekends Holidays:
<input type="text" value="Respond to Office Action - CTNF"/>	<input type="text" value="3"/> Months	Application Filing Date - Non-Provisional	<input type="text" value="0"/> Months	<input type="text" value="0"/>	<input checked="" type="checkbox"/>
<input type="text" value="Final Response to Office Action"/>	<input type="text" value="6"/> Months	Application Filing Date - Provisional	<input type="text" value="0"/> Months	<input type="text" value="0"/>	<input checked="" type="checkbox"/>
		Earliest Priority Filing Date			
		Effective Filing Date			
		<b>e-Office Action Mailroom Date</b>			
		Grant Date			
		Patent Expiration Date			
		Status Date			
		USPTO Status Date			

#### Apply Filters

Country:

Selected Countries:

Patent Type:

e-Office Action Image File Wrapper Code:

USPTO Status:

**Auto-Docket Template Setup (2015)**  
May be some improvement fo 2016 not shown

Copyright © 2015 Decision Design Corporation  
DocketTrak® software Version 4.10

# DOCKETTRAK DAILY EMAIL

DocketTrak Daily Docket Reminder - Message (HTML)

From: DailyDocketReminder@DocketTrak.com  
 To: bruce@youngtogether.com  
 Subject: DocketTrak Daily Docket Reminder

Sent: Thu 7/3/2014 11:46 AM

**Daily eMail format (2015)**  
**May be some improvement fo 2016 not shown**

**Daily Docket Reminder on 7/3/2014 for Bruce Young at YPS**

< 3 Days						
Event Date	Client	Ref #	Desc/Title	Type	Next Event	Current Status
7/4/2014	American Horticultural Society	AHS-109	PLANTLITE	Trademark	Awaiting Publication	Registered
7/5/2014	Impell Corporation	IMPL-034	ELECTRONIC METHODS FOR AIR FILTERING	Patent	3 1/2 Year Maintenance Fee Due	Granted Patent
7/5/2014	Impell Corporation	IMPL-005	NUCLEAR PIPING	Trademark	Awaiting Examiner Review	Registered

< 14 Days						
Event Date	Client	Ref #	Desc/Title	Type	Next Event	Current Status
7/8/2014	American Horticultural Society	AHS-104	SOIL PENETRATION	Trademark	Awaiting Publication	Notice of Publication
7/8/2014	American Horticultural Society	AHS-115	LEAF AND LEAF	Trademark	Statement of Use	Extension of Time Granted
7/10/2014	Impell Corporation	IMPL-440	METHOD FOR STORING ELECTRONIC AUDIO FILES	Patent	7 1/2 Year Maintenance Renewal Due	3 1/2 Year Maintenance Fee Paid
7/12/2014	Impell Corporation	IMPL-441	METHOD FOR SEARCHING FOR FINE MOTOR PARTS	Patent	Respond to Office Action	Office Action Received
7/12/2014	American Horticultural Society	AHS-137	digdeeperoil.com	Domain	Renewal Due	Registered
7/12/2014	American Horticultural Society	AHS-138	DIG DEEPER	Trademark	Renewal Due	Registered
7/15/2014	United Energy Systems	UESC-011	MEDIA SURFACE APPLICATION EMBOSING	Patent	Patent Expires	Granted Patent
7/15/2014	American Horticultural Society	AHS-003	LEAF AND LEAF	Trademark	Awaiting Client's Instructions	Trademark Search Conducted

< 60 Days						
Event Date	Client	Ref #	Desc/Title	Type	Next Event	Current Status
7/21/2014	American Horticultural Society	AHS-115	LEAF AND LEAF	Trademark	Statement of Use	Extension of Time Granted

See more about: DailyDocketReminder@DocketTrak.com.

# FILEYE

Information from 2015 Shown

No response received from Company about improvements for 2016

- fileye from Pro Delta Systems in England
  - [www.fileye.com](http://www.fileye.com)
  - Steve Kiernan, [steve.kiernan@fileye.com](mailto:steve.kiernan@fileye.com), +44 (0) 1787 388222
- Client/Server Solution Accessible over a LAN or the Internet
  - Hosted on a Windows machine on your LAN or an ISP hosted Windows server of your choosing
  - Also requires a SQL database (MySQL, MS SQL, or MS SQL Express)
  - Access from a Client using any Browser with optional SSL
  - Main Views are Records (Matters), Diaries (Tasks), and Cost Tracking
- Targeted to multi-jurisdictional Patent and Trademark prosecution
  - Also supports docketing for other activities including litigation, contracts, TTAB trials, etc.
  - Support for 30 languages

# FILEYE (CONTINUED)

- **Costs (actual prices in £)**
  - Starter Edition ~\$875/user/year
  - Professional Edition ~\$1750/user/year
  - One-Time Fee to import existing cases (~\$350 to ~\$5,000+)
  - Subscription includes 3/5 hours of training (Starter/Professional)
- **Automatic Date Calculation only included in Professional Edition (SmartLaws)**
  - Extensive set of rules for many different jurisdictions and IP types
    - But currently very minimal support built-in for US patent practice
  - User can generate their own events and rules and/or modify existing rules
  - Starter Edition requires a user to manually enter each activity/event and deadline
- **No real Integration with USPTO other Patent Data Sources**
  - It does provide links to USPTO and other IPO offices for publicly available matters

# FILEYE (CONTINUED)

- **Support for Client Access to the database included for both Starter and Professional Editions**
  - A View-Only User can search and view the cases they have access to
  - View Users (e.g. clients) ~\$440/user/year
- **No Built-in support for tracking references and IDS generation**
  - May be able to set up custom fields to help in some way
- **Supports a Single Priority Case (earliest priority)**
- **Email Integration with Outlook**
  - Outlook Add-In available for fileye
  - Incoming emails can be captured and assigned to a case
  - Can send e-mails to responsible attorney based on event dates
    - The email can have an attachment of a report or form letter
- **Document Management**
  - Can store any type of electronic document related to a case
  - Can either store actual file in fileye database or just a link to a file

# FILEYE (CONTINUED)

## ■ Form Letter and Report Generation

- Can generate a form letter or report based on a search
- Pre-configured with several examples of form letters and reports
- No limit to number of form letters and reports a user can add
- Complete control over fonts and styles. Images can be included.

## ■ Other Key Features

- Cost tracking and invoicing with support for multiple currencies (Professional Edition only)
- New releases are included in the subscription price
  - Typically 1-2 new versions with feature enhancements plus interim bug fix releases as necessary

# FILEYE SCREEN SHOTS

**FILEYE**
Welcome bruce | My Diary | Theme | Language | Logout | Support | About

**Records** | Diaries | Cost Tracking | Companies | Templates

Options | Cases | Responsible People

History | Clear | ABC-123 | Test 1234 | Bruce Young | YPS | 020.P.US

**SHORTCUTS**

- Search
- View
- Create

**TEMPLATES**

- Reports
- Letters

**CASE SELECTION**

Basic Search (2) | Advanced Search

Patent
  Select ...

Select ...

US

Select ...

**DETAILS**

Case List | Select Columns

Total Records: 9 | Start | Previous ( 1 of 1 ) | Next | End

Reference	Case Type	Case Sub Type	Title	Law	Person	Status	Created
018.P.US	Patent	Innovation	TUBE MADE FROM THERMO - FOR	US ex PCT (US-PCT)	SRK	Granted (Live)	09-Apr-2014 12:13
020.P.US	Patent	Not Specified	Navigational aid and carrie	US (US)	SRK	Granted (Live)	06-Jun-2007 16:07
028.P.US	Patent	Utility	Jewelry article with a bril	US Small Entity (US-SM)	SRK	Granted (Live)	12-Nov-2013 21:24
1000-001-US	Patent	Utility	NO-SPILL DRINKING CUP APPAR	US Small Entity (US-SM)	RMB	Granted (Live)	13-May-2015 14:03
163.P.US	Patent	Not Specified	Escalator Chain Drive Mecha	US ex PCT (US-PCT)	SRK	Granted (Live)	06-Jun-2007 16:07
172.P.US	Patent	Not Specified	Analysing a material sample	US ex PCT (US-PCT)	SRK	Granted (Live)	06-Jun-2007 16:07
175.P.US	Patent	Not Specified	Multi protocol label switch	US (US)	NJE	Granted (Live)	06-Jun-2007 16:08
ABC-123	Patent	Continuation	A Test Case	US Continuation/Divisional	SRK	Pre-Filing (Live)	15-Jun-2015 21:46
Test 1234	Patent	Utility	No=Spill Drinking Cup Appar	US Small Entity (US-SM)	RMB	Pre-Filing (Live)	11-May-2015 15:11

Total Records: 9 | Start | Previous ( 1 of 1 ) | Next | End

Records | Diaries | Cost Tracking | Companies | Templates

## List of Patents

# FILEYE SCREEN SHOTS

**FILEYE**
Welcome bruce | My Diary | Theme | Language | Logout | Support | About

Records | Diaries | Cost Tracking | Companies | Templates

Options | Cases | Responsible People

History | Clear | 1000-001-US | ABC-123 | Test 1234 | Bruce Young | YPS | 020.P.US

**SHORTCUTS**

- Search
- View
- Create

**LINKS**

- Edit Multiple Cost Items
- Diary Letters & Forms

**TEMPLATES**

- Reports
- Letters
- Forms
- Cost Tracking Reports
- Cost Tracking Letters

**CONTENTS**

- Contacts
- Dates
- Diaries
- Relationships
- Notes
- Documents
- Cost Stages
- Cost Items
- Audit

**PANELS**

Panels available for this page

Classes, Goods & Services - 1000-001-US

Add To **DETAILS** | Add

Reset Panels | Reset

**CASE VIEW**

Edit | Delete | Duplicate

Case Type Patent	Image
Case Subtype Utility	Edit Primary Image
Reference 1000-001-US	
Other Reference	
Title NO-SPILL DRINKING CUP APPARATUS	Responsible Person Richard Bugg
Country United States of America (US)	Law US Small Entity (US-SM)
Cost Currency US Dollars	VAT Type Domestic
Status Granted (Live)	Created 13-May-2015 14:03

**DETAILS**

Contacts - 1000-001-US

Total Records: 5 | Start | Previous ( 1 of 1 ) | Next | End

Type	Company	Contact	Email	
Client	Admar International, Inc.	Mr N. Edward Hakim		↑ ↓ 📄 🗑️
Applicant	Admar International, Inc.	Mr N. Edward Hakim		↑ ↓ 📄 🗑️
Foreign Associate	Husch Blackwell	Mr Edward D. Manzo	edward.manzo@huschblackwell.com	↑ ↓ 📄 🗑️
Foreign Associate	Husch Blackwell	Mr George S. Pavlik	george.pavlik@huschblackwell.com	↑ ↓ 📄 🗑️
Inventor	Admar International, Inc.	Mr N. Edward Hakim		↑ ↓ 📄 🗑️

Total Records: 5 | Start | Previous ( 1 of 1 ) | Next | End

Go To Top

Labels - 1000-001-US

Total Records: 2 | Start | Previous ( 1 of 1 ) | Next | End

Label	Contents	Note	
Foreign Associates Ref	522374-20		📄 🗑️
Storage Box	Original Located in Vault		📄 🗑️

Total Records: 2 | Start | Previous ( 1 of 1 ) | Next | End

Go To Top

Patent Information



Dates - 1000-001-US

Total Records: 6 Start Previous ( 1 of 1 ) Next End

Type	Date	Number
Issue Fee	19-Mar-2015	
Grant	21-Apr-2015	9,010,568 B2
Acceptance	22-Jan-2015	
Expiry	24-Sep-2030	
Application	24-Sep-2010	12/877,021
Publication	06-Jan-2011	2011-0000910 A1

Select ...

Total Records: 6 Start Previous ( 1 of 1 ) Next End

Go To Top

---

Diary - 1000-001-US

Diary Status Filter  Outstanding  Inactive  Completed  Dead  All

Create Restart Diary Letters & Forms

Total Records: 2 Start Previous ( 1 of 1 ) Next End

Type	Event	Activity	Due	Reminder	Person	Status	Executed
Formality	Opposition Period	Await Notice Of Opposition	21-Jan-2016	21-Dec-2015	RMB	Active (awaiting us)	
Renewal	1st Renewal (21-Oct-2018)	Proceed with Renewal	21-Oct-2018	21-Jul-2018	RMB	Active (awaiting us)	

Total Records: 2 Start Previous ( 1 of 1 ) Next End

Go To Top

---

Relationships - 1000-001-US

Create

Total Records: 1 Start Previous ( 1 of 1 ) Next End

Type	Related Case	Title	Law	Number	Date	Priority
Corresponding Filing	ABC-123	A Test Case	US Continuation/Divisional (US-CTD)			

Total Records: 1 Start Previous ( 1 of 1 ) Next End

Go To Top

---

Notes - 1000-001-US

Create

Note	Text	Label
------	------	-------

Go To Top

---

Documents - 1000-001-US

Create

Total Records: 3 Start Previous ( 1 of 1 ) Next End

Image	Topic	Item	Reference	Description	Document Date	Document Time	Primary
	Documents	Original Document		Original Patent	21-Apr-2015	08:25:07	
	Images	Drawings		Picture	09-Sep-2010	08:29:31	Yes
	Images	Drawings		Drawings	07-Sep-2010	08:27:45	

Total Records: 3 Start Previous ( 1 of 1 ) Next End

Go To Top

## Fileye Patent Information (Cont'd)

Cost Items - 1000-001-US									
Cost Item Status Filter <input checked="" type="checkbox"/> Ready to Bill/Approved <input checked="" type="checkbox"/> Unbilled/Received <input type="checkbox"/> Billed <input type="checkbox"/> Void/Cancelled <input type="checkbox"/> All									
<input type="button" value="Create"/> <input type="button" value="Edit Multiple"/>									
Total Records: 1 <input type="button" value="Start"/> <input type="button" value="Previous"/> ( 1 of 1 ) <input type="button" value="Next"/> <input type="button" value="End"/>									
Stage	Item	Item Date	Type	Status	Expected Revenue	Actual Cost	Charge by	Billed	Person
Prosecution	Filing Fee	07-Sep-2010	Cost	Unbilled/Received	0.00	284.56			RMB
Total Records: 1 <input type="button" value="Start"/> <input type="button" value="Previous"/> ( 1 of 1 ) <input type="button" value="Next"/> <input type="button" value="End"/>									
Go To Top									
Audit List									
Audit log is restricted to the last 100 records.									
Audit Status Filter <input checked="" type="checkbox"/> All <input type="checkbox"/> Insert <input type="checkbox"/> Update <input type="checkbox"/> Delete									
Total Records: 93 <input type="button" value="Start"/> <input type="button" value="Previous"/> ( 1 of 10 ) <input type="button" value="Next"/> <input type="button" value="End"/>									
User	Date	Time	Action	Table	From Data	To Data			
bruce	15-Jun-2015	21:46:29	Insert	CASE_REL		Case_id: 1000-001-US Case_rel_id: ABC-123 Rel_id: Corresponding Filing Casenumber: null Casedate: null Seq: 0			
kyle	13-May-2015	14:59:01	Insert	CASE_LABELS		Case_id: 1000-001-US Contents: Original Located in Vault Label_id: Storage Box			
kyle	13-May-2015	14:57:18	Insert	CASE_CONTACTS		Case_id: 1000-001-US Contact_id: N00006 Type_id: Applicant Account_id: Admar International, Inc. Seq: 1			
kyle	13-May-2015	14:56:23	Insert	CASE_CONTACTS		Case_id: 1000-001-US Contact_id: N00006 Type_id: Client Account_id: Admar International, Inc. Seq: 1			
kyle	13-May-2015	14:56:15	Insert	CASE_CONTACTS		Case_id: 1000-001-US Contact_id: N00006 Type_id: Inventor Account_id: Admar International, Inc. Seq: 1			
kyle	13-May-2015	14:50:07	Insert	CASE_CONTACTS		Case_id: 1000-001-US Contact_id: G00007 Type_id: Foreign Associate Account_id: Husch Blackwell Seq: 2			
kyle	13-May-2015	14:49:59	Insert	CASE_CONTACTS		Case_id: 1000-001-US Contact_id: E00007 Type_id: Foreign Associate Account_id: Husch Blackwell Seq: 1			
kyle	13-May-2015	14:42:49	Insert	CASE_LABELS		Case_id: 1000-001-US Contents: 522374-20 Label_id: Foreign Associates Ref			
kyle	13-May-2015	14:42:33	Delete	CASE_LABELS		Case_id: 1000-001-US Contents: Label_id: Clients Ref			
kyle	13-May-2015	14:42:26	Update	CASES	Type_id: Patent Subtype_id: Utility Status_id: Granted Country_id: US Law_id: US-SM Cost_group_id: United States of America (Patent) Cost_currency_id: US Dollars Vat_type_id: Domestic	Type_id: Patent Subtype_id: Utility Status_id: Granted Country_id: US Law_id: US-SM Cost_group_id: United States of America (Patent) Cost_currency_id: US Dollars Vat_type_id: Domestic			
Total Records: 93 <input type="button" value="Start"/> <input type="button" value="Previous"/> ( 1 of 10 ) <input type="button" value="Next"/> <input type="button" value="End"/>									
Go To Top									

## Fileye Patent Information (Cont'd)

# FILEYE SCREEN SHOTS

fileye - My Outstanding Diary - Internet Explorer  
 http://trial.fileye.com/Fileye/Diary/Reports/MyDiary.aspx

**MY OUTSTANDING DIARY** Close Print Email to Me Export to Excel Export to PDF

Person: All Due Date from: Earliest to: Latest

Type	Event	Activity	Due	Reminder	Person	Reference	Title/Mark	Status
Formality	Priority Documents	Order Priority Documents	25-Oct-2013	25-Aug-2013	AJ	130167	DermaSukin	Active (awaiting us)
Formality	Filing	Await Associate's Filing Report		31-Jan-2015	ER	227.T.CN	CRYSTAL JADE GOLDEN PALACE	Active (awaiting 3rd party)
Renewal	5 Year Renewal (02-Mar-2015)	Await Instructions	02-Mar-2015	02-Feb-2015	SRK	077.D.EE	Lillekastmiskann "Nöid"	Active (awaiting 3rd party)
Renewal	5 Year Renewal (02-Mar-2015)	Await Instructions	02-Mar-2015	02-Feb-2015	SRK	077.D.EE	Lillekastmiskann "Nöid"	Active (awaiting 3rd party)
Formality	Acceptance	Report Acceptance To Client		05-Feb-2015	ER	226.T.SG	CRYSTAL JADE GOLDEN PALACE	Executed (awaiting us)
Formality	Opposition Period	Receive Notice Of Opposition	09-Mar-2015	09-Feb-2015	SRK	028.P.US	Jewelry article with a brillia	Active (awaiting us)
Formality	Opposition Period	Receive Notice Of Opposition	09-Mar-2015	09-Feb-2015	SRK	028.P.US	Jewelry article with a brillia	Active (awaiting us)
Renewal	14th Year (09-May-2015)	Proceed with Renewal	09-May-2015	09-Feb-2015	SRK	129.P.SK	Frictional rock bolt	Active (awaiting us)
Renewal	14th Year (09-May-2015)	Proceed with Renewal	09-May-2015	09-Feb-2015	SRK	129.P.SK	Frictional rock bolt	Active (awaiting us)
Miscellaneous	Contact client	Catch up about overdue items		14-Feb-2015	SRK	175.P.US	Multi protocol label switching	Active (awaiting us)
Miscellaneous	Contact client	Catch up about overdue items		14-Feb-2015	SRK	175.P.US	Multi protocol label switching	Active (awaiting us)
Renewal	17th Year (16-May-2015)	Proceed with Renewal	16-May-2015	16-Feb-2015	SRK	123.P.RO	PROCEDEU DE TRATARE A ELEMENTE	Active (awaiting us)
Renewal	17th Year (16-May-2015)	Proceed with Renewal	16-May-2015	16-Feb-2015	SRK	123.P.RO	PROCEDEU DE TRATARE A ELEMENTE	Active (awaiting us)
Renewal	5th Year (20-May-2015)	Proceed with Renewal	20-May-2015	20-Feb-2015	SRK	066.P.BR	DISPOSITIVO E MÉTODO PARA ANCO	Active (awaiting us)
Renewal	5th Year (20-May-2015)	Proceed with Renewal	20-May-2015	20-Feb-2015	SRK	066.P.BR	DISPOSITIVO E MÉTODO PARA ANCO	Active (awaiting us)
Formality	Filing	Send Application Papers To Associate		22-Feb-2015	SRK	209.T.CN	Crystal Jade Jiang Nan	Active (awaiting us)
Formality	Filing	Send Application Papers To Associate		22-Feb-2015	SRK	209.T.CN	Crystal Jade Jiang Nan	Active (awaiting us)
Formality	Filing	Send Application Papers To Associate		22-Feb-2015	SCG	221.T.MM	Crystal Jade MY Bread & CC cha	Active (awaiting us)
Formality	Filing	Send Application Papers To Associate		22-Feb-2015	SCG	222.T.MM	Crystal Jade MY Bread & CC cha	Active (awaiting us)
Formality	Filing	Send Application Papers To Associate		22-Feb-2015	SCG	223.T.MM	Crystal Jade my Bread & CC cha	Active (awaiting us)
Renewal	4th Year (23-May-2015)	Proceed with Renewal	23-May-2015	23-Feb-2015	SRK	069.P.HR	WINDTURBINE	Active (awaiting us)
Renewal	4th Year (23-May-2015)	Proceed with Renewal	23-May-2015	23-Feb-2015	SRK	069.P.HR	WINDTURBINE	Active (awaiting us)
Formality	National Phase Chapter I	Make Out National Files	24-Mar-2015	24-Feb-2015	SRK	018.P.WO	TUBE MADE FROM THERMO - FORMAB	Active (awaiting us)
Formality	National Phase Chapter I	Make Out National Files	24-Mar-2015	24-Feb-2015	SRK	018.P.WO	TUBE MADE FROM THERMO - FORMAB	Active (awaiting us)

## List of Tasks and Events

# FILEYE SCREEN SHOTS

The screenshot displays the FILEYE web application interface. At the top, there is a navigation bar with the FILEYE logo and user information. Below this is a menu bar with various options like Records, Diaries, Cost Tracking, etc. The main content area is divided into several sections:

- SHORTCUTS:** A list of quick links for Countries, Laws, Dates & Numbers, Labels, Notes, and IPO Type List.
- SMARTLAWS SHORTCUTS:** A list of quick links for Workflows, Diary Events, Case Creation Cost Stages, Law Export, and Law Import.
- WORKFLOW VIEW:** A section for editing a workflow. It shows a workflow named "Example Official Action" with an "Active?" status of "Yes". There is a "Notes" field and a "Diary Types" list with checkboxes for Official Action, Formality, Hearing, Maintenance, Miscellaneous, Non Diary, Renewal, and Statement/Proof of Use.
- DETAILS:** A section for the "Workflow Activity List". It contains a table with columns: Activity, Remind, When, Basis, Change Status to, Event Executed?, Person, and Calculate Costs. The table lists activities such as "Report to Client", "Consider Instructions from Client", "File Response To Official Action", and "Await Response From Patent Office".

A dropdown menu is open over the "Basis" column of the "Decision on Appeal" row, showing options: Select..., Due Date, Today, Previous Activity, Report to Client, Consider Instructions from Client, File Response To Official Action, and Await Response From Patent Office.

## Date Calculation Setup

# FLEXTRAC IP – CTS - CHANGES SINCE 2015

- FlexTrac IP – CTS V7 from TORViC Technologies, Inc.
  - TORViC acquired Flextrac in early 2014
  - [www.flextrac.com](http://www.flextrac.com)
  - Sue Baxter, [sales@flextrac.com](mailto:sales@flextrac.com), (855) 997-9933 x109
  - Discounts for NAPP members under NAPP's Vendor Access Program
- Multiple Options for hosting
  - Local Install on a PC (single user or networked multi-user capable)
  - Local Client Install with Local Server (networked multi-user capable)
  - Local Client Install with Cloud-Hosted Database (multi-user capable)
  - Cloud Hosted by TORViC Servers and accessed over the internet using a browser, RDP, or a thin client
- Support for a Wide Variety of IP Matters
  - Wide variety of IP Matters (depending on version used), Including:
    - US, Foreign and PCT Patent Applications
    - US, Foreign State, Madrid Trademark Applications and US Trademark Opposition
    - Copyright, licensing, trade secret, invention disclosures, and general cases

# FLEXTRAC IP – CTS (CONTINUED)

- **Cost Depends on Edition, Hosting, & Purchase/Subscribe**
  - All editions allow for unlimited matters and unlimited users
  - “Implementation Services” fee of \$249.75\* required with all licenses
  - **Solo Edition: Either Patent OR Trademark**
    - Subscription \*\*\* (Cloud or local install): **\$89.95\*\*/mo**
    - Purchase (local install): **\$786.19\* plus first year annual support of \$786.19** (required) – 2 simultaneous users (while paying for annual support)
  - **Professional Edition: Both Patent AND Trademark**
    - Subscription \*\*\* (Cloud or local install): **\$114.95\*\*/mo**
    - Purchase (local install): **\$1311.19\* plus first year annual support of \$1311.19** (required) – Unlimited simultaneous users
  - **Corporate Edition: Both Patent AND Trademark plus Invention Tracking/Awards and Outside Counsel Management**
    - Subscription \*\*\* (Cloud or local install): **\$209.95\*\*/mo**
    - Purchase (local install): **\$2623.69\* plus first year annual support of \$2623.69** (required) – Unlimited simultaneous users
- \* - Includes 75% NAPP VAP Discount for NAPP Members
- \*\* - Includes \$10/mo NAPP Discount
- \*\*\* - Unlimited users for local install;  
1 user for cloud install with additional users discounted
- **SQL Server Remote Hosting available for local installs - \$50/mo**
  - Flextrac manages the database and backups – US-based hosting

# FLEXTRAC IP – CTS (CONTINUED)

- Automatic Date Calculation Included
  - Preference Rules: System Defined (Automatic) Date Calculations
  - Reminder Rules: User Defined (Automatic) Date Calculations
  - Miscellaneous Reminders: User Defined (Ad-hoc) Date Entry
- USPTO Data
  - Scrapes data from Private PAIR to update status on matters
  - Can Compare/Update Public PAIR data to entered data for a case
    - Direct access to Public PAIR from within CTS
  - Can import XML from Private PAIR to populate, update, or check Case
    - .xml file manually downloaded from PAIR then manually uploaded to CTS
- No integration or linking to other patent data sources
- Has the ability to publish Matter Data Reports for a client to access over the web
  - Can select which fields are published and client can click on a field to drill in and get more detail
  - Hosted in an https secure environment and protected by login and password for each client
  - Requires FlexTrac IP WebAccess Add-On
    - extra fee based on # cases published monthly

# FLEXTRAC IP – CTS (CONTINUED)

- **Tracks Cited References/Prior Art and can Generate an IDS**
  - References can be entered into the system and then linked to a Prior Art search or Official Action (Examiner Search)
  - System can create USPTO 1449 form or export .xml data for SB/08 IDS form to submit IDS in the case
  - Can Copy and Paste a set of references from one case to another
    - No easy automated way to cross-cite references in one case to another related case
- **Tracks priority from multiple cases with proper relationship**
- **Email Integration**
  - Can be assigned its own email address and the directly connect to email server to send and receive emails
- **Form Letters**
  - FlexTrac actively manages over 450 USPTO forms
  - Can also create custom forms



# FLEXTRAC IP – CTS (CONTINUED)

## ■ Document Management

- Each Case can have a specific directory on the machine/network specified for storage of case related files
  - Directly Accessible with a button in the CTS application
- Option to use a true Enterprise-Level document management with FlexTrac IP – EDMS Workflow Add-On
  - Extra Cost for full-text/content search, version control, legal hold and business workflow capability

## ■ Report Generation – Improved since 2015

- Dashboards
  - Executive Dashboard (Capability to view Key Performance Indicators via graphical representation, including charts, graphs and gauges)
  - Grid Views (Capability to view, sort, group, structure matter data directly within FlexTrac IP – CTS and export it to MS Excel or PDF with one click of a button)
- Standard Reports
  - Out-of-the-box reports available for FlexTrac IP – CTS users
- Custom Reports
  - The capability to generate any type of a user required report, specific to FlexTrac IP – CTS data, which can be exported into either spreadsheet or document based formats

# FLEXTRAC IP – CTS (CONTINUED)

## ■ Other Key Features

- Free 30 day demo available
- Time Tracking & Billing with QuickBooks Sync (add-on for extra fee)
- Clients who are active on Annual Support & Maintenance, receive:
  - Future software enhancements and new versions for free
  - Unlimited, simultaneous/concurrent users (CTS Solo Edition receives 2<sup>nd</sup>)
  - Dedicated and unlimited Client Support
  - 24/7 online service tools via our “Client Care Center”
  - Complimentary training sessions “CTS Best Practices” offered every month
- Optional Add-In Modules for
  - Enterprise Document Management & Business Process Workflow (extra fee)
  - Client Matter Data Online Access (fee based on # cases published monthly)
  - Annuity Payment Management (coming in Q4)
  - MS Outlook Calendar Reminder Administration
  - Automated Database Backups (extra fee)
  - Remote Desktop Sharing (extra fee)
  - QuickBooks Sync (extra fee)

# FLEXTRAC IP – CTS SCREENSHOTS

V7-IP/Case Tracking System C:\CTS700\CTS\$Demo.mdb (No Forms Database Open)

DOCKET INSIGHT REPORTS NEXUS SYSTEM

US Patent Foreign Patent PCT Patent Review General Copyright Licensing Trade Secrets Prior Art Technical Fields Dashboard Exclusive Search

SHORTCUTS

- Reminders List
- Add New Organization
- Add New Person
- New US Patent
- New Copyright Case

Case Review

Last Year vs. Current Year

IP Type	Last Year	Current Year
Foreign Patent	1	4
US Patent	1	3
Foreign TM	4	0
U.S.Trademark	1	1
PCT	1	0
Copyright	0	1
Disclosure	0	2
General	0	1
License	0	1
Trade Secret	0	1
TMOG	0	1

Weekly Outlook

Attorney/Admin: ABC

Day	Event
Monday, June 15	
Tuesday, June 16	9:00 AM 10:00 AM Draft Confidential Disclosure Agreement for Di
Wednesday, June 17	9:00 AM 10:00 AM Receive Notice of Reply Brief Noted-US (BT11C)
Sunday, June 21	9:00 AM 10:00 AM Receive OC Answer-US (PSI107)

Status Overview

U.S. Patents

U.S. Trademarks

User Activity

All Cases

Office Actions & IDS

Dashboard

# FLEXTRAC IP – CTS SCREENSHOTS

V7-IP/Case Tracking System C:\CTS700\CTSDemo.mdb (No Forms Database Open)

DOCKET INSIGHT REPORTS NEXUS SYSTEM

US Patent Foreign Patent PCT Patent Review General Copyright Licensing Trade Secrets Prior Art Technical Fields Dashboard Exclusive Search

ADMINISTRATION System Preferences Users Management

New Open Clear Search Excel PDF Print Save Refresh Help

Record Details

Case No. Organization All From / To Attorney All Status Any Filing Date

Drag a column header here to group by that column

Case...	Countr...	Cli...	Title Or Mark	St...	Application ...	Fili...	Client C...	Senior ...	Primary...	Date La...	Applic...	Patent Ex...	Formal Dra...	Formal Dra...	Date...	Invent...
AAI101	US	AAI	Effluent Retriever	New		7/27/...		ABC	GHI	5/27/2015	U					ADAM...
AVM101	US	AVM	Error Creation Code Inval...	Ab...	09/333,333	2/17/...		ABC	GHI	5/27/2015	U					KOWA...
AVM1...	US	AVM	Error Creation Code Inval...	Issu...	10/888,888	6/30/...		ABC	GHI	5/27/2015	U	2/17/2029	8/30/2010	8/14/2010	8/23/2...	KOWA...
AVM102	US	AVM	Error Creation Code Dyn...	Con...	63/333,333	4/1/2...		ABC	GHI	5/27/2015	P					KOWA...
AVM1...	US	AVM	Error Creation Code Dyn...	Issu...	09/222,222	3/27/...		ABC	GHI	5/27/2015	U	3/27/2030			7/29/2...	KOWA...
EDW1...	US	ED...	Bicycle Air Brake	Pen...	11/000,000	3/27/...	Watson01	ABC	GHI	5/27/2015	U					WATS...
GWP....	US	G...	MODULAR NETWORKE...	Issu...	12795395	6/7/2...		BAY1		6/17/2015	U	6/7/2030			7/22/2...	JONS...
GWP....	US	G...	Modular Networked Light ...	Pen...	12795395	6/10/...		BAY1		6/16/2015	U					
GWP....	US	G...	Modular Networked Light ...	New				BAY1		6/16/2015	U					
EDW1...	US	ED...	Apparatus for Stopping a ...	Pen...	11/000,123	4/27/...	Watson01	ABC	GHI	5/27/2015	U					WATS...
HSI101	US	HSI	BackPack Clip Holder	Issu...	10/000,000	3/22/...	BP-001	ABC	GHI	5/27/2015	U	3/22/2032	5/22/2012	5/9/2012	9/25/2...	PAYS...
ZEI101	US	ZEI	Automobile Measuring S...	Issu...	10/000,000	9/5/2...		ABC	GHI	5/27/2015	U	9/5/2032	11/5/2012	10/23/2012	2/8/20...	WAGN...
BTI101	US	BTI	Method and Apparatus fo...	Pen...	11/000,000	7/29/...		ABC	GHI	5/27/2015	U		9/29/2013	8/16/2013		STAL...
BTI10...	US	BTI	Method and Apparatus fo...	Pen...	11/000,123	10/1/...		ABC	GHI	5/27/2015	U					STAL...
GWP....	US	G...	Automated Load Assess...	Exp...	61261707	11/1/...		BAY1		6/16/2015	P					

SHORTCUTS

ADMINISTRATION

@Support | FlexTrac.

List of Patents

# FLEXTRAC IP – CTS SCREENSHOTS

U.S. Patent Case (Record Locked to allow your updates)

---

First Prev Next Last

Navigate

Save Clear Delete Del (F)

Edit

Reminder Rules Preference Rules

Record

Case History More...

Record

Licensing Compare Import Help

Other Windows Info

---

**Case Management**

Sr Atty:

Pri Atty:

Admin:

**Item Details**

Case No.  Client ID  List

App Serial No.   Filing Date

Title  Status

Date Issued:  Patent No.

Client Case  Expiration

---

TYPE/REM/PRIORITY

INVENTORS/OTHER

PUBLICATION

ALLOW/ISSUE/MAINT

NOTES/ABSTRACT/FLEXFIELDS

EXAMINER

**Application Type**

Provisional

Utility

PCT 371

Plant

Reissue

ReExam

Design

**Case Reminder List**

Item	Due Date	Who
Send Client Reminder for 3.5 Year Maintenance Fee-US	9/6/2014	BAY2
Receive Acknowledgement for 3.5 Year Maintenance F...	4/24/2015	BAY2
Receive Receipt for 3.5 Year Maintenance Fee-US	5/24/2015	BAY2
Send Client Reminder for 7.5 Year Maintenance Fee-US	9/6/2018	BAY2
7.5 Year Maintenance Fee Due-US	3/6/2019	BAY1
Last Date to Pay 7.5 Year Maintenance Fee-US	9/6/2019	BAY1

There are 6 Reminder Items for this Case

Priority Case is NOT the earliest filed case in the chain.

Priority Case

Priority Date

Next Office Action Expected

## Patent Information

# FLEXTRAC IP – CTS SCREENSHOTS

FT
Current Reminder List
✕

Show List For

Who   Save

Client   Save

Green dates due beyond one month

Yellow dates due within the next month

Red dates overdue

Double Click a case or item to go to the screen containing the Reminder Item 15

Case Number	Title Or Mark	Item	Who	Due Date
GWP.0002.0US_PCT	Modular Networked Light Bulb	File PCT Request	BAY1	6/10/2011
GWP.0002.0US_PCT	Modular Networked Light Bulb	Verify ISA Received Search Copy-PCT	BAY1	8/10/2011
GWP.0002.0US_PCT	Modular Networked Light Bulb	File PCT Art 19 Amendment	BAY1	10/10/2011
GWP.0002.0US_PCT	Modular Networked Light Bulb	Receive PCT Search Report	BAY1	10/10/2011
GWP.0002.0US_PCT	Modular Networked Light Bulb	PCT Publication	BAY1	12/10/2011
GWP.0002.0US_PCT	Modular Networked Light Bulb	File PCT Demand	BAY1	1/10/2012
▶ GWP.0002.0US_PCT	Modular Networked Light Bulb	Enter Natl Ph - Ch I-PCT	BAY1	2/10/2012
GWP.0002.0US_PCT	Modular Networked Light Bulb	Receive PCT Written Opinion	BAY1	6/10/2012
GWP.0002.0US_PCT	Modular Networked Light Bulb	File PCT Art 34 Amendment	BAY1	7/10/2012
GWP.0002.0US_PCT	Modular Networked Light Bulb	Receive PCT Examination Report	BAY1	10/10/2012
GWP.0002.0US_PCT	Modular Networked Light Bulb	Enter Natl Ph - Ch II-PCT	BAY1	12/10/2012
GWP.0002.PUS	MODULAR NETWORKED LIGHT BULB	7.5 Year Maintenance Fee Due-US	BAY1	3/6/2019
GWP.0002.PUS	MODULAR NETWORKED LIGHT BULB	Last Date to Pay 7.5 Year Maintenance Fee-US	BAY1	9/6/2019
GWP.0002.PUS	MODULAR NETWORKED LIGHT BULB	11.5 Year Maintenance Fee Due-US	BAY1	3/6/2023
GWP.0002.PUS	MODULAR NETWORKED LIGHT BULB	Last Date to Pay 11.5 Year Maintenance Fee-US	BAY1	9/6/2023

## List of Tasks and Events

# FLEXTRAC IP – CTS SCREENSHOTS

Edit Preference Rules

First Prev Next Last Save Forms Export All Import All Restore Help

Reminder Description: Reminder to respond to final Office Action. Final = "Y", Restriction Requirement = "N", ex Parte Quale = "N", ReExam = "N"

Reminder Text: Respond to Final Office Action

REMINDER TIME	NOTES	ORIGINAL VALUES	REPETITIVE TIME	REPETITIVE ORIGINAL TIME
---------------	-------	-----------------	-----------------	--------------------------

Reminder Date Due

Time: 2

Key field: OA - DateMailed

When:  Before  After

Type:  Days  Months  Years

Who will be reminded

Sr Atty  Pri Atty  Admin

Priority: 1

Category:

Specific Users:

This Reminder is:  Enabled  Disabled

Rule Key: CT\$PO003

Country/State: US 8/31/2004 CT\$

## Date Calculation Setup

# FLEXTRAC IP – CTS OUTLOOK CALENDAR REMINDER

The screenshot displays the Microsoft Outlook calendar interface for Sunday, September 4, 2016. The calendar shows a single appointment at 9:00 AM. The appointment details window is open, showing the following information:

- Subject:** CTS Reminder for Case Number: HSI101
- Location:** FTOR\_CTS
- Start time:** Sun 9/4/2016, 9:00 AM
- End time:** Sun 9/4/2016, 9:15 AM
- Description:** 3.5 Year Maintenance Fee Due-US

The appointment details window also includes a menu with options such as FILE, APPOINTMENT, INSERT, FORMAT TEXT, REVIEW, gSyncit, and various actions like Save & Close, Delete, Copy to My Calendar, Add join.me, Invite Attendees, Options, Tags, and Zoom.



# FLEXTRAC IP – CTS SCREENSHOTS

FlexTrac. FlexTrac Logout

## Dashboard

17/6/2015

Export to XLS Export to PDF

Enter text to search...

Drag a column header here to group by that column

Case Number	Case Status	Publish Date	Publish User
PSI091	Registered	06/16/2015	CT\$
PSI091_CANADA	Pending	06/16/2015	CT\$

Client View from FlexTrac IP WebAccess Add-On

# REVATRADEMARK

No Change to Software Since 2014

- RevaTrademark +Patents 6.0 from RevaWare in Tennessee
  - [www.revaware.com](http://www.revaware.com)
  - Tom Naughton, [tomn@revaware.com](mailto:tomn@revaware.com), (615) 472-1960
  - No Update since early 2014
- Windows “Desktop” Application
  - Will run on virtually any Windows PC
- Trademarks and Patents
  - Patents – Design, Innovation, PCT, Plant Provisional, Utility, Utility Model
    - Some Date Calculations included, but plan on customizing even for “supported” jurisdictions and types.
      - US (Design, PCT National Stage, Plant, Provisional, & Utility), WIPO (PCT – But supplied date calculations are inadequate), Australia (Innovation, PCT National Stage, Utility), Canada (PCT National Stage, Utility), UK (PCT National Stage, Utility)
      - Can create your own date calculations for any other jurisdiction (customizable)
    - Limited Support for tracking Priority And Related Applications
  - Trademarks Date Calculation for US and several Foreign Countries
    - Program supports any jurisdiction – create your own date calculations

# REVATRADEMARK (CONTINUED)

- **One Time Fee based on Number of Matters – No Maintenance**
  - \$1950 for up to 150 matters
  - \$2950 for up to 300 matters
  - \$3950 for up to 600 matters
  - \$4950 for up to 1500 matters
  - \$5950 for unlimited matters
  - Can upgrade # matters for difference in price
    - (e.g. 150->300 matters for \$100)
  - Minor version upgrades free, Major version upgrades discounted
  - Free Demo Version Available – No Time Limit but limited to 80 records
- **Automatic Date Calculation Included**
  - Fairly robust rule based calculations
  - User can change their rules calculations if desired
  - User can generate their own events and rules
- **No real integration with USPTO Patent data or other Patent Data Sources**
  - Some integration with USPTO TEAS Trademark data for updates

# REVATRADEMARK (CONTINUED)

- **Support for Client Access to the database**
  - Can support different logins with some limitations to Capabilities
    - e.g. View-Only (but no way to limit to a single client)
  - A Separate \$1500 Add-On is Available to Create an Extranet which can support Client Access
- **No support for tracking references and IDS generation**
- **Tracks priority from multiple cases with proper relationship**
- **Email Integration**
  - Can generate (but not send) e-mails based on event dates
  - Can populate information from any field in Database
  - Must be reviewed and sent manually
- **Form Letters**
  - Can merge database information into Word
  - Manually generated (not event based)
- **Document Management**
  - Can create links in the patent record to folders or files on your system to manage documents

# REVATRADEMARK (CONTINUED)

## ■ Report Generation

- A fixed set of reports can be generated with limited customization
  - Database information can be filtered to determine which records are included
  - Columns can be selected, arranged and sorted in at least some of the reports
  - Can be printed, saved as pdf, or exported to Excel
  - Also allows a table of filtered information to be exported to Excel or as a table in a Word file

## ■ Other Key Features

- A nice set of YouTube training videos are available
  - Search YouTube for “RevaWare” or “RevaTrademark”
  - [https://www.youtube.com/channel/UCD7CVHfyG5TQLvyYcpTIN\\_rw](https://www.youtube.com/channel/UCD7CVHfyG5TQLvyYcpTIN_rw)
- Free Demo Version is full-feature, not time limited, and supports up to 80 records

# REVATRADEMARK SCREEN SHOTS

Patents

File ▾ Help ▾ Go To: Trademarks Patents Oppositions Companies Reports Preferences | Previous Next ▶ DEMO / PRACTICE DATABASE

Patents List | Owner & Dates | More Information | Treaty Filings/Linked Patents |

Choose Columns ... > | < Report Margin

Patent	Company	Jurisdiction	Treaty	Application	Patent No.	Our Docket	Client Docket	
Automobile Compass With Motion Sensor And S...	50/50 Research, Incorporated	USA		10/456,789	7,741,753	PA.0058.0042	02-0058.0042	Utilit
Bug-Zapper Bougainvillea Plant	50/50 Research, Incorporated	USA		11/258,943	PP17,414	PA.0058.0060	03-0058.0060	Plar
Calorie-Counting Dinner Plate	Dimmy's, Inc.	USA	B	11/597,789		PA.0048.0053	02-0048.0053	Utilit
Calorie-Counting Dinner Plate	Dimmy's, Inc.	Australia	Y	PCT/US2007/8976		PA.0048.0057	06-0048.0057	PCT
Calorie-Counting Dinner Plate	Dimmy's, Inc.	Germany	Y	PCT/US2007/8976		PA.0048.0058	06-0048.0058	PCT
Calorie-Counting Dinner Plate	Dimmy's, Inc.	United Kingdom	Y	PCT/US2007/8976		PA.0048.0059	06-0048.0059	PCT
Cone of Silence	ABCD, Inc.	United Kingdom	B	10/189,477	7,144,456	PA.0001.0061	02-0001.0061	Utilit
Cone of Silence	ABCD, Inc.	Germany	Y	PCT/US2004/86007	DE666555	PA.0001.0062	06-0001.0062	PCT
Cone of Silence	ABCD, Inc.	United Kingdom	Y	PCT/US2004/86007	11111054	PA.0001.0063	06-0001.0063	PCT
Cone of Silence	ABCD, Inc.	WIPO	Y	PCT/US2004/86007		PA.0001.0064	06-0001.0064	PCT
Cone of Silence	ABCD, Inc.	USA		11/456,789		564564564	564564564	Utilit
Fake Eyeglasses With Enclosed Digital Camera	Bond Enterprises	United Kingdom	B	10007008		PA.1294.0017	02-1294.0017	Utilit
Fake Eyeglasses With Enclosed Digital Camera	Bond Enterprises	Australia	Y	PCT/GB2008/00205		PA.1294.0018	06-1294.0018	PCT
Fake Eyeglasses With Enclosed Digital Camera	Bond Enterprises	Canada	Y	PCT/GB2008/00205		PA.1294.0019	06-1294.0019	PCT
Fake Eyeglasses With Enclosed Digital Camera	Bond Enterprises	USA	Y	PCT/GB2008/00205		PA.1294.0020	06-1294.0020	PCT
Ink Pen With Endless Ink Supply	ABCD, Inc.	USA		11/547,125		PA.0001.0048	02-0001.0048	Utilit
Ink Pen With Endless Ink Supply And Room De...	ABCD, Inc.	USA		60/471,514		PA.0001.0043	01-0001.0043	Prov
Ink Pen With Endless Ink Supply And Room De...	ABCD, Inc.	USA		11/258,123		PA.0001.0045	02-0001.0045	Utilit
Ink-Producing Device Extracts Moisture and Car...	ABCD, Inc.	USA		11/165,548		PA.0001.0049	02-0001.0049	Utilit

Record: 8 Of 28

Select View:  Patents List  Alerts  Email Alerts  Set Contacts      Lead Time (Days): 0

List of Patents

# REVATRADEMARK SCREEN SHOTS

**Patents**

File ▾ Help ▾ **Go To:** Trademarks **Patents** Oppositions Companies Reports Preferences ◀ Previous 18 of 28 Next ▶ **DEMO / PRACTICE DATABASE**

Patents List Owner & Dates More Information Treaty Filings/Linked Patents

Patent Name/Title:

**This Patent Is Linked to Other Patents**

Print

<u>Company/Owner:</u> ABCD, Inc.	<u>Jurisdiction:</u> USA	<u>Date Name</u>	<u>Date</u>	<u>Compl.</u>	
City: Nashville	Dept./Unit: <input type="text"/>	▶ Priority Date	Aug 24, 2012	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State/Province: Tennessee	Non-Publish: <input type="checkbox"/> Fast Track: <input type="checkbox"/>	Application Filed	Aug 21, 2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Zip/Postal: 37204	<u>Publication:</u> <input type="text"/>	Effective Filing Date	Aug 21, 2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Country: USA	<u>App. No (Nat):</u> 11/258,123	Office Action	Oct 01, 2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Main Phone: 615-555-6321	<u>App. No (Int):</u> <input type="text"/>	Response to Office Action	Oct 11, 2013	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<u>File/Matter:</u> 2500.1004	<u>Patent No:</u> <input type="text"/>	Office Action	Mar 31, 2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Our Docket: PA.0001.0045	<u>Patent Type:</u> Utility	Response to Office Action	Jun 30, 2014	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Docket: 02-0001.0045	<u>Filing Basis:</u> Original				
	<u>Status:</u> Pending				

Re-Order

Date	Patent Action	Alert	Compl.	Hours	Billed	Expenses	Billed	
▶ Sep 30, 2013	Current application rejected by examiner on grounds that device is actually two inventions: 1) the internal ...	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Oct 02, 2013	Sandy Fiddlestein confirmed in phone conversation that client would like to proceed with divisional applica...	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
*								

Patent Information

# REVATRADEMARK SCREEN SHOTS

The screenshot shows the 'Patents' application window. The title bar reads 'Patents'. The menu bar includes 'File', 'Help', and 'Go To: Trademarks Patents Oppositions Companies Reports Preferences'. The current view is 'Patents List'. The search filters are set to 'Show Dates From: Mar 26, 2014 to: Jul 03, 2014'. The table below shows one patent entry.

Patent	Company	Jurisdiction	Application	Filing Basis	Date Name	Date	C...
Ink Pen With Endless Ink Supply And ...	ABCD, Inc.	USA	11/258,123	Original	Response to Office Action	Jun 30, 2014	<input type="checkbox"/>

Record: 1 Of 1

Select View:  Patents List  Alerts  Email Alerts  Set Contacts      Lead Time (Days): 0

List of Alerts



# REVATRADEMARK SCREEN SHOTS

Dates/Preferences

File Help Go To: Trademarks Patents Oppositions Companies Reports Preferences DEMO / PRACTICE DATABASE

Trademark Date Templates Patent Date Templates Settings

**Patent Dates** Jurisdiction: USA Patent Type: Utility

Set Recur Options

	Jurisdiction Date	Always Add When Status Set To:	Is Relative	Add If Relative Exists	Interval	Interval Type	Before./After Date	Adjustment	Date Email	Batch Update
▶ 1	Priority Date	(All)	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
2	Application Filed	(All)	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
3	Effective Filing Date	(All)	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
4	Publication	(None)	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
5	Foreign Filing Due	(None)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Years After	Priority Date		Edit	Update
6	Issue Date	Issued	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
7	3.5 Year Fee	Issued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	42	Months After	Issue Date		Edit	Update
8	7.5 Year Fee	Issued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	90	Months After	Issue Date		Edit	Update
9	11.5 Year Fee	Issued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	138	Months After	Issue Date		Edit	Update
10	Expiration Notice	Issued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6	Months Before	Expiration		Edit	Update
11	Expiration	Issued	<input checked="" type="checkbox"/>	<input type="checkbox"/>	20	Years After	Effective Filing Date		Edit	Update
12	Office Action	(None)	<input type="checkbox"/>	<input type="checkbox"/>					Edit	Update
13	Response to Office Ac...	(None)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	Months After	Office Action	(None)	Edit	Update

Select View:

Add/Edit Master Dates
  Copy Dates To Jurisdiction
  Edit Jurisdiction Dates
  Re-order Dates
  Edit Treaty Participants

## Date Calculation Setup

# REVATRADEMARK SCREEN SHOTS

Reports

File Help Go To: Trademarks Patents Oppositions Companies Reports Preferences DEMO / PRACTICE DATABASE

Trademark Reports Patent Reports Create Spreadsheets

Report Name	Select
Patents by Name	<input type="checkbox"/>
Patents by Company	<input type="checkbox"/>
Patent by Company w/Dates	<input checked="" type="checkbox"/>
Patents by Company w/Contacts	<input type="checkbox"/>
Patents by Company - Licensed	<input type="checkbox"/>
Patent Actions	<input type="checkbox"/>
Patents - List	<input type="checkbox"/>
Patents with Dates - List	<input type="checkbox"/>
Export to Word (select fields below)	<input type="checkbox"/>
Export to Excel (select fields below)	<input type="checkbox"/>

Report Subtitle:

Print Selected Report

Filters:

Company:   Add Related Companies

Jurisdiction: USA

Status:

Filing Basis:

Patent Type:

Classes:

Category:  Subcategory:

Position:

Contact:

Clear All Filters  Date Filters

Stored Filter:  Save As Filter ...  Use Alerts Filter

Select	Patent Date	On or After	On or Before	Compl.
<input checked="" type="checkbox"/>	Application Filed			(All)
<input type="checkbox"/>	Effective Filing Date			(All)
<input type="checkbox"/>	National Filing Due			(All)
<input type="checkbox"/>	PCT Filing Date			(All)
<input checked="" type="checkbox"/>	Priority Date			(All)
<input type="checkbox"/>	Publication			(All)
<input type="checkbox"/>	Foreign Filing Due			(All)
<input checked="" type="checkbox"/>	PCT Publication			(All)
<input type="checkbox"/>	Request for Examination			(All)
<input checked="" type="checkbox"/>	Notice of Allowance			(All)
<input checked="" type="checkbox"/>	Issue Date			(All)
<input type="checkbox"/>	1 Year Fee			(All)
<input type="checkbox"/>	2 Year Fee			(All)

Preview Patents Choose Columns ...

Company	Patent	Jurisdiction	Application	Patent No.	Our Docket	Client Docket	Status
50/50 Research, Incorporated	Smashable Computer With Automatic R...	USA	10/101,121	7,456,123	PA.0058.0016	02-0058.0016	Issued
50/50 Research, Incorporated	Automobile Compass With Motion Sens...	USA	10/456,789	7,741,753	PA.0058.0042	02-0058.0042	Issued
50/50 Research, Incorporated	Bug-Zapper Bougainvillea Plant	USA	11/258,943	PP17,414	PA.0058.0060	03-0058.0060	Issued

## Report Generation