

## **About the Quick Start Guide**

AcclaimIP is a powerful software product containing 155 million patent documents updated from dozens of different data sources. It has been under development since 2010 with several updates each month.

Mastering the software can take some time, but most users find they can get a good degree of competence in just a couple of hours, especially if they have a solid foundation in patents.

This guide is not a step-by-step tutorial, but rather designed to get you up-to-speed with the software as quickly as possible. Each page covers one topic and gives you an overview of key capabilities of each major function, and how/where to access them.

You'll find with a little trial and error; you'll be running like a pro in no time.

For a more detailed user manual go to  $\dots$ 

http://help.AcclaimIP.com



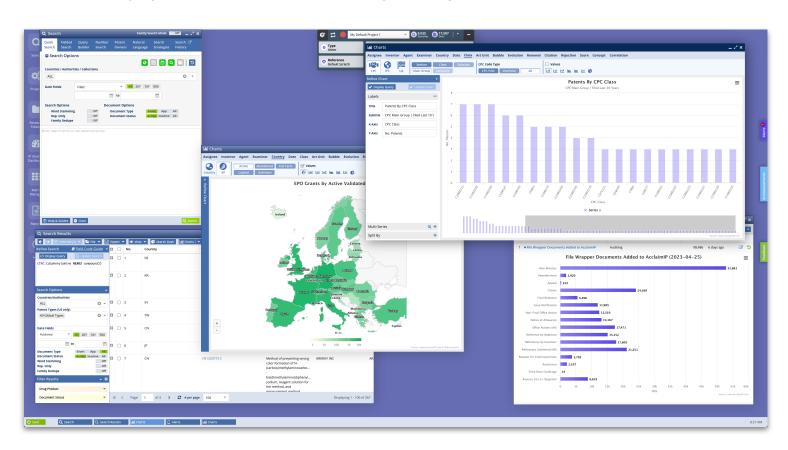
## **Application Login & Layout**

## Login

Login to AcclaimIP by clicking Login in the upper right of the AcclaimIP.com website. Your login ID is your email address. An administrator will give you a temporary password which must be reset the first time you login.

## Layout

The design of AcclaimIP resembles a desktop interface, resembling an operating system rather than a typical web app. This layout is conducive to multitasking and exploring various research avenues, which are essential for most search projects. Moreover, AcclaimIP can adjust to any screen size.



## Windowing Layout

Purpose-built windows perform specific tasks such as review a set in the Search Results or present a specific patent in the Doc Details.

## **Grouped Paging**

Windows such as the Doc Details, Search Results, PDF, PAR and Figure Viewer are tied together so they all page at the same time.

### **Tangential Research**

You won't lose your place if you decide to investigate something that comes up. New windows appear.

## **Window Locking**

To save real estate, some windows are replaced with new content every time they load. To prevent this, click the Lock icon and a new window will open.



## **Search Tabs**

### **Quick Search**

Basic form for initiating keyword searches and advanced Synax.

## Fielded Search

Basic form for initiating common searches.

## **Query Builder**

Advanced query builder allowing for use of all field codes and nested clauses.

### **Number Search**

Paste up to 5000 document numbers.

## **Patent Owners**

Easy form for finding patents owned by patent owners.

## Natural Language

Returns related documents from a pasted paragraph of text.

## **Search Strategies**

Canned forms targeted at specific search strategies.

### **Search History**

Remembers searches performed and documents viewed. Search History is saved to the current Project.

## **Search Window**

Searches are started within the Search Window. Open the window by clicking the Search icon on AcclaimIP's desktop. The top of the window shows a row of eight tabs for searching using vaious methods. You'll notice that the Search Options field-set is consistent across many of the tabs where you set your basic search parameters.

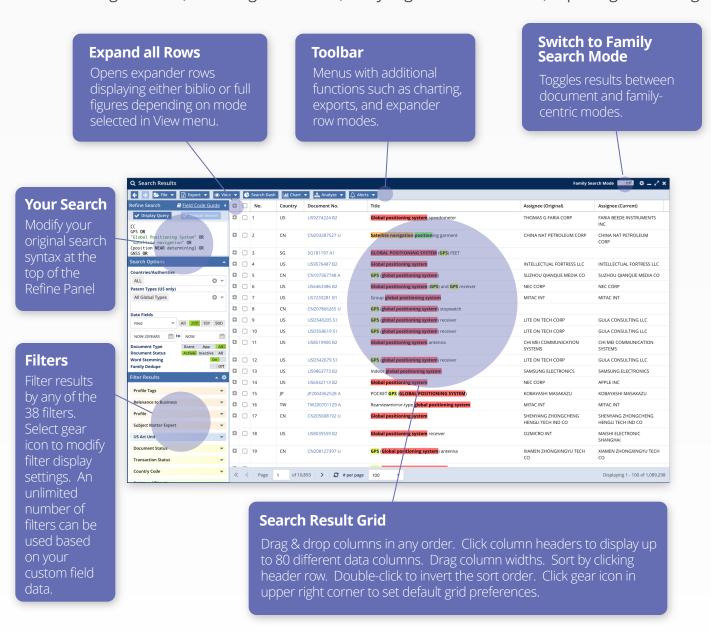
Initiate your searches from the Search window, but once a search is run, all subsequent refinements are done in the Search Result Window's refine panel.





## Search Result Window

Once a search is initiated, the results appear in the Search Result window. The search result window contains all the tools for refining searches, reviewing documents, analyzing results with charts, exporting and setting alerts.



### **Grid Columns**

Drag & Drop column order. Display up to 80 columns. One click sorting. Set default preferences.

## **Expander Rows**

Change the content displayed in expander rows from biblio to figure view from the View menu.

#### **Filters**

38 pre-programmed filters and unlimited custom filters can be displayed. Change the order by clicking the gear icon.

### **Set Analysis**

Analyze the search results set with charts found in the View menu. PDFs. Set column Cluster search results with concept mapping.

## **Exports**

Export up to 70 columns of data, bulk order. Create column profiles for easy recall.

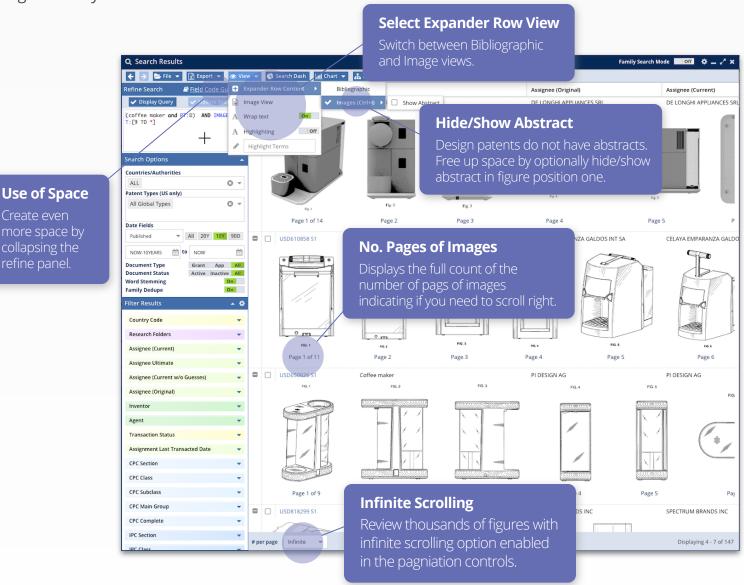




## **Expander Row Content**

The expander rows in the Search Result grid can be opened by clicking the 1 in the first column. The content can by customized with either the Biblio data, along with the representative image, or the full set of images associated with each patent document displayed. When searching in Family Mode, expander rows display grid listing the family mambers.

listing the family members.



## Multi-Mode Expanders

Switch from Bibliographic to Image View in the Expander Rows. Toggle **Ctrl-I** to switch modes back and forth.

#### **Hover Mouse to Zoom**

Mouse-over any thumbnail images and see a dynamic zoomed in view. Double-click to open full size image in its own window.

## **Opening Expander Rows**

Open expander rows individually by clicking the + icon in the far-left column. Click the + in the header to expand the entire grid.

### **Legacy Image Viewer**

Choose View>Image View to see the legacy image viewer. It's still handy for some figure reviewing projects.



## **Charts & Visualizations**

Patent data can be analyzed using 16 base chart types, which can be modified to tell the precise story you are creating with the data. Select the Charts menu from the Search Result window. Chart the set by modifying the options in the ribbon bar or the chart's refine panel.

## **Modify Charting Parameters**

Select the specific parameters you want to chart from the tool ribbon.

#### **Multi-Series**

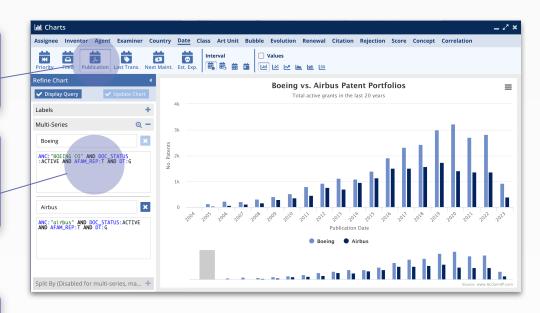
Click the **Q** icon to add a second series. Modify just one parameter such as assignee name in the second series.

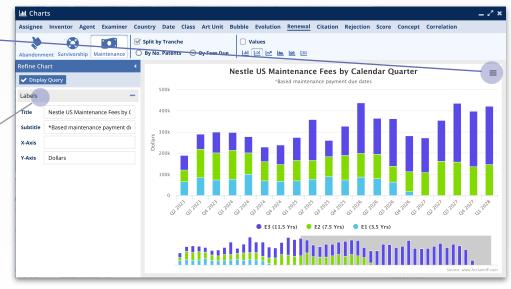
## **Export Options**

Export chart graphics and/or data from the hamburger menu. Multiseries charts like these shown export all the data comprising the entire chart.

## **Modify Labels**

Titles and axes have default labels which vary based on the chart run. Modify the labels to add clarity to your charts.





## **Chart Types**

Chart types like bar, bubble, map etc. vary based on the options you choose.

### **Data Types**

Chart by 16 unique data types found in the top menu bar of the charting window.

### **Edit Charts**

Editing options are found in both the ribbon, the refine panel. Chart colors are modified by clicking on the legend label below the x-axis.

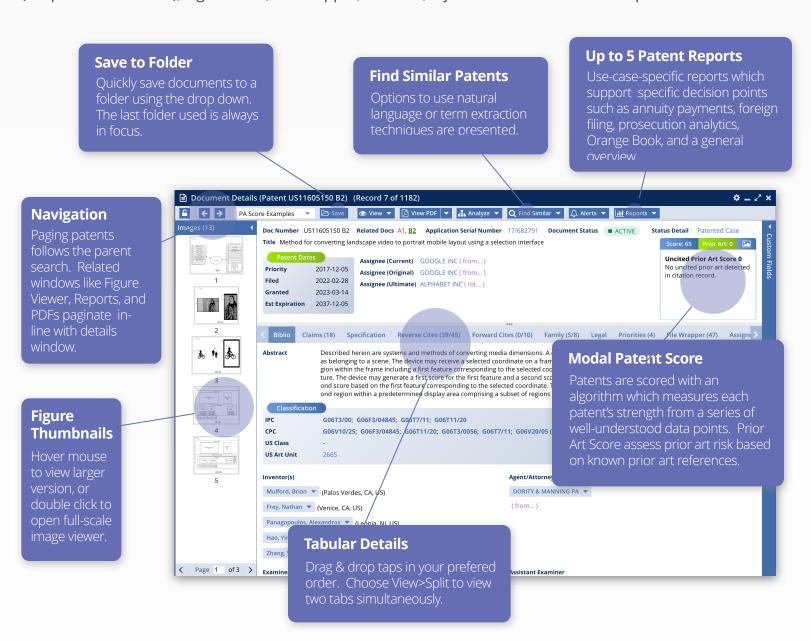
## **Smart Chart Exports**

Export from the hamburger menu in all standard graphics formats. Data exports are context sensitive and include supporting data on some charts.



## **Document Details Window**

The Doc Details window displays all the details printed on the patent as well as related data including family (simple and extended), legal events, file wrapper, citations, rejections and other data in up to 15 tabs.



### **Compact View**

Designed to put as much information in front of you as possible. Choose View>Split to view two tabs at once.

## **Tombstone Data**

The key identifying data always remains at the top of the window keeping you focused on the document.

## Tabular Details

Patent Details are held in 15 sub-tabs. AcclaimIP remembers the last tab in focus. Drag & drop into preferred order.

#### **Patent Score**

Score widget gives an overall score, broken down into Technology, Legal and Citation Components.

## **Quick Paging**

Browse large lists of patent details by paging with the arrow keys. AcclaimIP remembers which tabs are in focus.



## Case Level

All citations are indicated by the current representative document for each case cited or citing.)

## Consistent

All publications derived from one filing have identical citation profiles.

## **Direct & Family Cites**

Citations are displayed as those citing(ed by) a specific matter/case, and another tab citing(ed by) the entire familly.

### **Prior Art Scores**

Reverse citation record is scored for uncited prior art from 0 to 5.

#### Meta Data

Citations are decorated with Category and Rejection codes to indicate how each citation was used.

## Non-Patent Literature

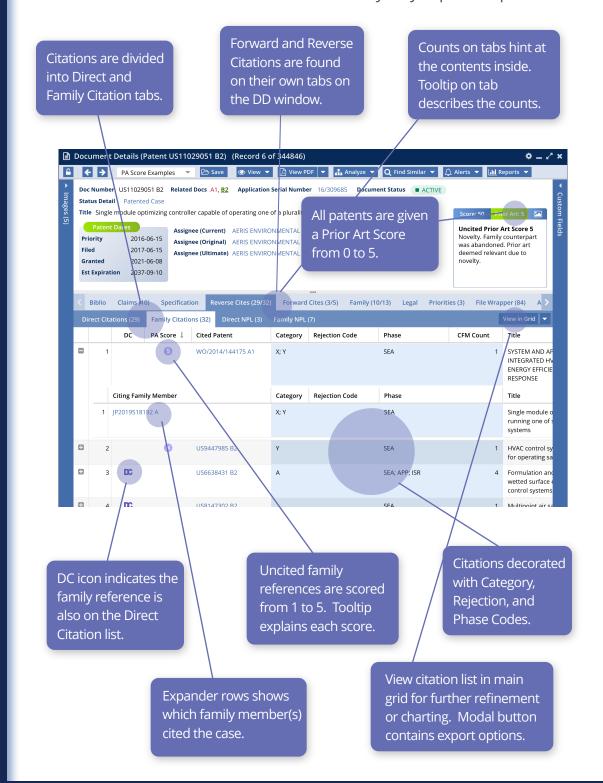
NPL are in their own subtabs and also gathered at the direct and family level.

### **Query-able Data**

Use the Field Code Guide to find the queries to search for specific conditions in the citation record, such as all my patents cited by a specific assignee.

## **Patent Citations**

AcclaimIP has the world's most advanced citation data which includes displaying both the direct and family citation records in both directions. Each citation is decorated with meta data which indicates how the citation was used. Uncited references are scored based on the likelihood they may impact the patent claims.





## **Search Tabs**

#### One Click from DD

A single click opens the modified Search Results window which supports unique tasks for refining similar patent searches.

## Similar Document Explorer

Panel with dedicated features for modifying your natural language search.

## **Required Terms**

Enter specific terms, strings, or advanced syntax to refine your search results.

## **Change Source Text**

Switch from claim-toclaims matching to full text with one click.

## **Prior Art Only**

Limit returned results to those with priority dates earlier than the source document

## **Class Fingerprint**

Automatically inserts a special query that influences the results by the source document's CPC and IPC classification profile.

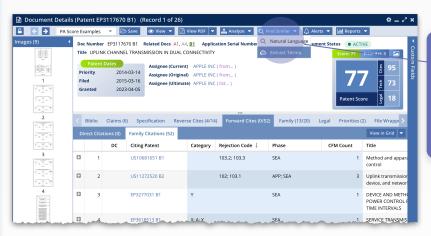
### Max No. Documents

Specify the maximum number of results you want the search engine to return.

## **Find Similar Patents**

Finding similar patents combines language, keyword extraction, and classification techniques to return the best possible list of potentially related, similar or prior art patents. With one click, AcclaimIP gives you excellent matches, and the tools you need to help the search engine refine the related art you are looking for.

## Two Options from the Find Similar Menu



### **Find Similar Button**

Both options give you the same ability to refine the search after the initial results have rendered.

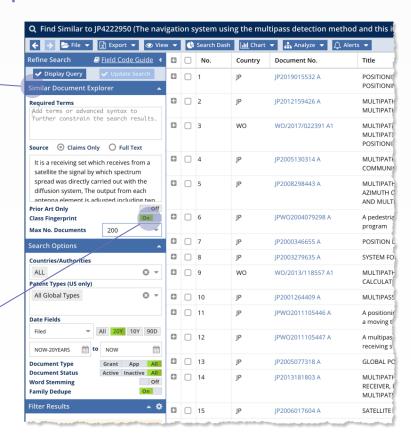
## Similar Document Explorer Refine Panel

## Similar Document Explorer

Special refine panel appears for interacting with the search engine. Common tasks such as requiring specific terms, or refining with advanced syntax tells the search engine what criteria matching documents must have.

## **Class Fingerprint**

Applies a unique class query to your natural language search identifying which patents are also classified most similar to the source document.

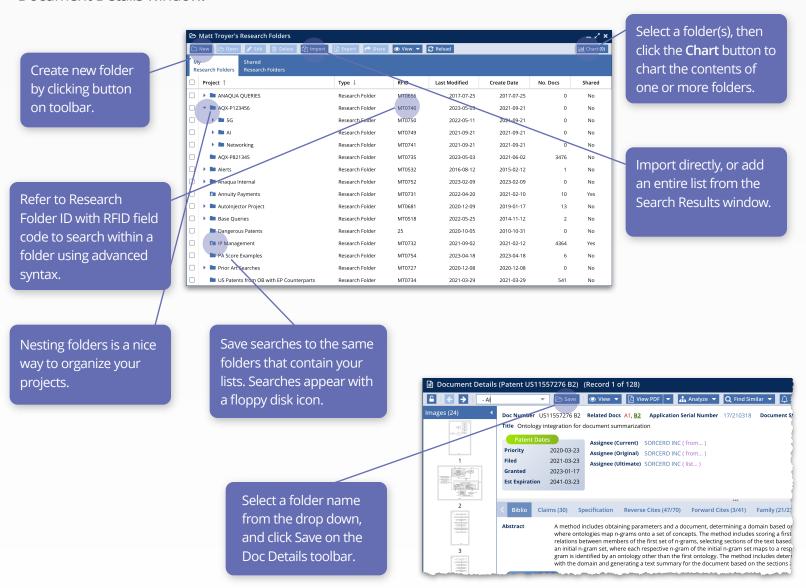






## **Folders & Saving Searches**

Folders contain list of patents or saved searches. Create folders from the Research Folders icon on AcclaimIP's desktop. Share folders with your colleagues who have AcclaimIP seats in the same account. Archive older folders that are no longer being used. Save patents to folders from either the Search Results window or the Document Details window.



## Up to 5000 Folders

Create up to 5000 folders that can contain up to 50K patents and saved searches.

### Shareable

Folders can be shared with other users in your account. Give them read only or read/write access.

## Searchable

Open a folder and search within using the refine panel. Or use the folder ID along with the *RFID* field code to enhance your advanced syntax.

## **Charting From Folders**

Select one or more folders and click the Chart button to chart their contents in all avaliable charts in AcclaimIP's charting package.





## **Portfolio Management Reports**

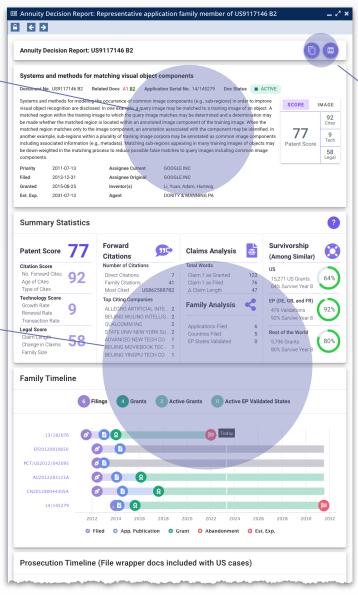
Five reports surface the data to help you evaluate patents at specific decision points during the patent lifecycle. Patent Analytis Report, Foreign Filing, Prosecution Analytics, Annuity Decision and Orange Book reports cover all major decision points during the patent lifecycle. Reports available from the Reports drop down menu on the Document Details window.

## **Concise Patent Summary**

Each report contains a patent summary designed to give you a brief overview of the patent in focus.

## **Report Specific Information**

Each report has use-case -specific information to support key decision points during the patent lifecycle.



#### **Share**

Reports are designed to be shared with users, even if they don't have AcclaimIP seats such as your patent attorneys.

Share from the report itself or share thousands using the Export function on the Search Result window.

## **Patent Analytis**

Basic report covering key aspects for understanding a patent an its impact.

## Foreign Filing

Data specifically designed to help you determine where to file foreign counterparts.

## **Prosecution Analytics**

Discloses prosecution history and key stats on art unit and examiner to determine the best path forward.

## **Annuity Decision**

Information disclosed supports renewal payment decisions for your global portflio.

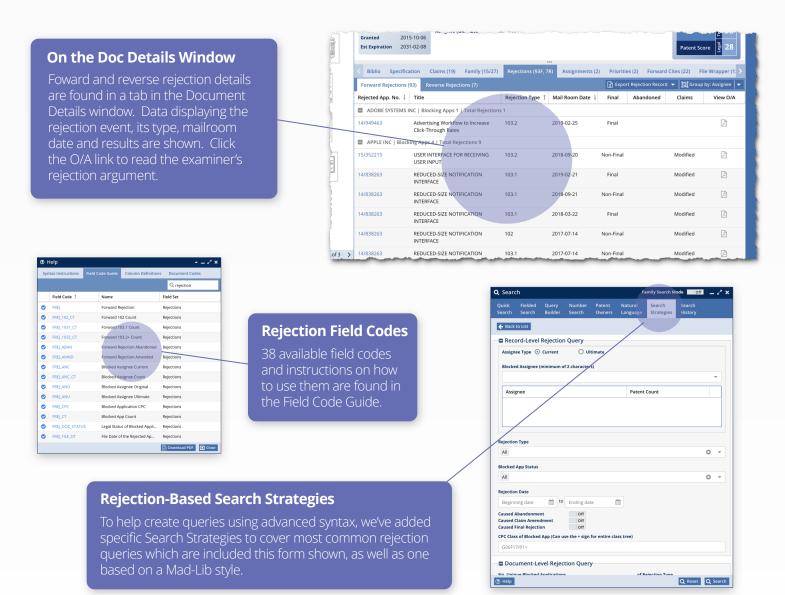
## **Orange Book**

For pharma patents, the reports consolidates OB data with patent data using helpful visualizations.



## Forward and Reverse Rejection Data

Forward rejections are special citations when an examiner explicitly references a document in their novelty (102) or obviousness (103.n) arguments. AcclaimIP parses these data from examiner office actions.



#### 102 and 103.n Rejections

Forward and reverse rejections are marked as either 102 or 103.n, where the "n" denotes the order in which a document was referenced in an obviousness argument.

## **Office Action Documents**

AcclaimIP associates competitors' office actions with your patents when they are referenced in a rejection argument. One click to review the examiner's decision

## **Query Syntax**

38 unique field codes are included so you can determine the who, what, when and result of rejection references.

## **Exports & Alerts**

Unique Excel export is can be downloaded from the Rejections tab. It giving you all pertinent data for both the blockiing and blocked applications.





## **Complete Metrics**

19 charts and visualizations bring all relevant prosecution statistics to bear to support successful patent prosecution.

## Guide Decisions at Every Decision Point

The data you need is queued for various phases of prosecution from responding to the first office action, requesting an interview, filing an RCE or initiating an appeal.

# Multiple Points of View.

Compare your examiner's statistical history to that of the art unit, the classification, tech center.

# Share with Your Clients & Colleagues

Share reports via a PDF document or a link directly to the report reader application.

## **Prior Examples**

Find examples of applications that overcame similar objections from the same examiner.

#### Access in AQX

Beginning with AQX 10.2, prosecution analytics are integrated directly.

## **US Prosecution Analytics**

Make more informed decisions during your patent prosecution with integrated prosecution statistics for your examiner, art unit, tech center, CPC class and firm. Prosecution analytics are available in one click from any application, or from the Search Result window from the *Analyze>Prosecution Analytics* menu.

# One Click to Start

# Prosecution Timeline

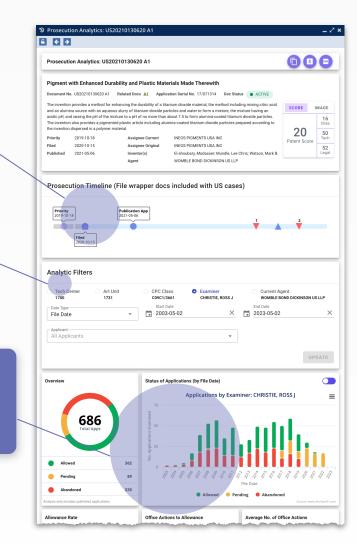
Key prosecution events are recored on an easy-to-read timeline

### **Quick Filters**

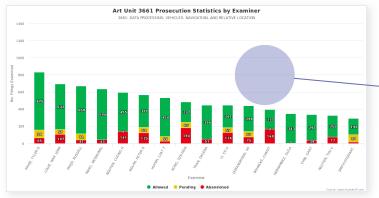
View statistics from multiple points of views with just one click.

## **19 Key Statistics**

Guide your decisions with supporting analytics at every stage of the prosecution process



## **Prosecution Splits**



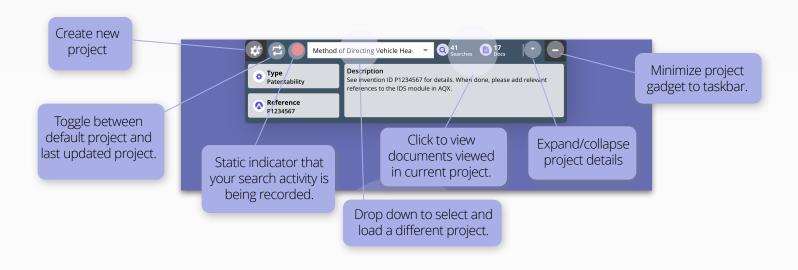
# Examiner & Art Unit Statistics

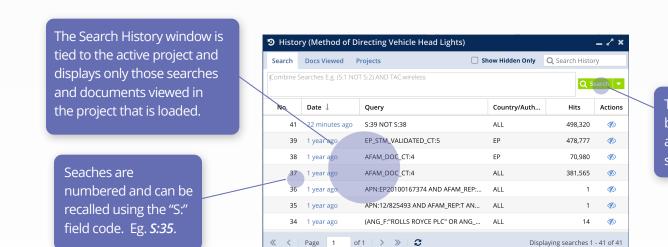
Evaluate the historic likelihood of success of your examiner or art unit.



## **Projects, Search History and Combining Searches**

The widget at the top of the AcclaimIP desktop is called the Projects gadget, which contains controls to save your search history and documents viewed to a specific project which can be recalled later. Essentially, projects provides a way to manage your search history into separate baskets and improves management of your production research.





The modal Search button includes the ability to export search history.

## **Easily Accessible Controls**

Create projects, switch between projects, and access search history from one convenient gadget in the center of the desktop.

## **Better Manage Work**

Organize your work by referencing AQX case IDs and instructions associated with each project.

### **Recall Later**

Update research projects with current patent information by recalling your previous research and re-running the searches.

### **Combine Searches**

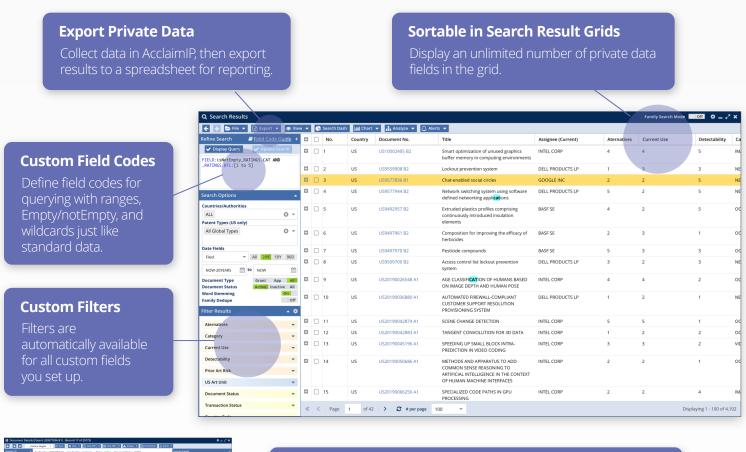
Saved searches are numbered and can be recalled by referencing the number. You can also use standard Boolean operators when recalling searches. For Example.

S:39 NOT S:38.



## **Private Data and Custom Fields**

Custom Data Fields allow users to annotate patents with private data. A robust security and authorization model determines who has access and whether they are read-only or can edit and export private data. Clients use custom fields to collect data from SMEs, as well as to display data captured in AQX and PattsyWave.





## View, Annotate or Edit from Doc Details

Depending on the permissions set, users can view and edit data which is useful for marking and annotating patents during any research project. Data is constantly indexed, allowing managers to monitor progress of specific research tasks.

## **Eight Field Types**

Define fields for text, integers, decimals, dates, URLs, tags, Booleans, integer-select, and stringselect.

## **Workflow Integrations**

Custom Field data are integrated seamlessly in the workflow on the Doc Details, Search Results, Filters, Exports, and Field Codes.

## **Import and Export**

Export private data from the normal Export window.
Import data using the import utility located in
Start>Custom Fields>Upload Custom Data.

### **Permission Model**

Alerts are easiest to review using the workflows presented in the application. Alerts are processed on Tuesday mornings ET.





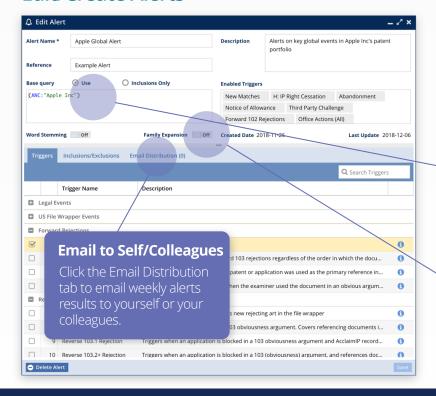
## **Alerts**

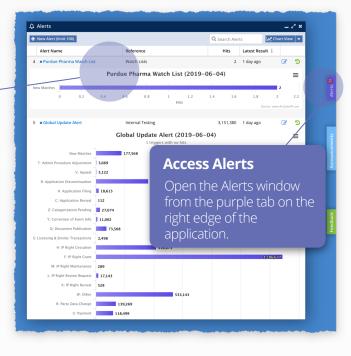
Alerts were rebuilt from the bottom up in 2019 and include 44 specific events relating to a patent's legal record, maintenance fees, and file wrapper updates. In addition, we added email distribution lists, review workflows and the ability to create watch lists based on single documents or entire patent families.

#### **Alerts Window**

The Alerts window displays each alert in a bar chart. Click a bar to drill into the Search Results displaying that week's hits. Click the History button to review previous week's matches. Click the Edit icon to make changes to your alerts.

## **Edit/Create Alerts**





### **Base Query**

Patents will match when they match both the base query and the specific trigger event.

### **Family Expansion**

Turn on to match new publications in matching families even if the family member itself is not an explicit match.

## 44 Event Triggers

Trigger events include new publications, global legal events, US file wrapper events, and forward and reverse rejection events.

## Integrated into Workflow

On the Search Result and the Doc Details windows, notice an alert button with options for appending to an existing alert or establishing a new one.

## **Email Distribution Lists**

Send alerts to your colleagues by adding them to distribution lists. Emails are sent via a white-listed service.

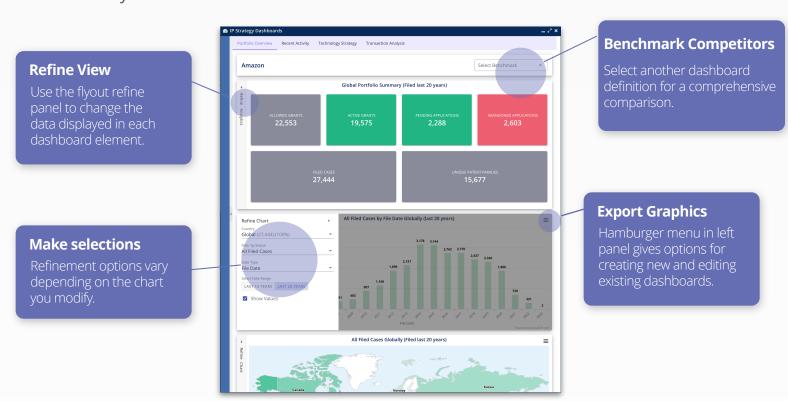
#### **Alert on Private Data**

By alerting on changes to data stored in custom fields, you can configure alerts to enable any number of workflows including tagging experts to review patents.



## **Dashboards**

AcclaimIP includes four unique dashboard layouts to analyze competitors, specific technologies, law firm activity, and law firm competitive analysis. Access dashboards by clicking on the *IP Strategy Dashboards* icon on AcclaimIP's desktop. Create dashboards in AcclaimIP, then syndicate them to AQX users or share them with other users in your account.





## Special Dashboard Features

**Quick Share:** Shares dashboard as read only with all users in your account.

**Use as Benchmark:** Appears as a benchmarkable dashboard when viewing.

**Expose in AQX:** Not shown. SSO users who login via AQX have the option to show the dashboard in AQX.

## **Dashboard Management**

Dashboards are organized by type, then alphabetically in tabs in the left-most panel. Double-click any dashboard title to view.

## **Integrated with AQX**

Dashboards can be viewed in AQX. First login to AQX, then open AcclaimIP via SSO and create dashboard. Select "Expose in AQX" when defining the

## **Drillable Charts and Lists**

Dashboards report summary content. Click any chart element to review the specific patents that are represented.

## Shareable

Share to your entire rhelm by cliking "Quick Share" or give full access to specific individuals by right-clicking the dashboard name in the West panel.



## Single Sign-On (SSO)

Log into AQX, and with one click you can open your instance of AcclaimIP. SSO simplies integration of widgets and access to AcclaimIP.

#### **Dashboards**

Monitor your competition (or yourself), specific technologies or law firm performance with integrated dashboards.

## **Snapshot Analytics**

Quick analytics of citations, competitors with similar patents and patent score.

### **Analytics Report**

All 5 decision point analytics reports are available from AQX's patent reference screen.

### **Third-Party Patents**

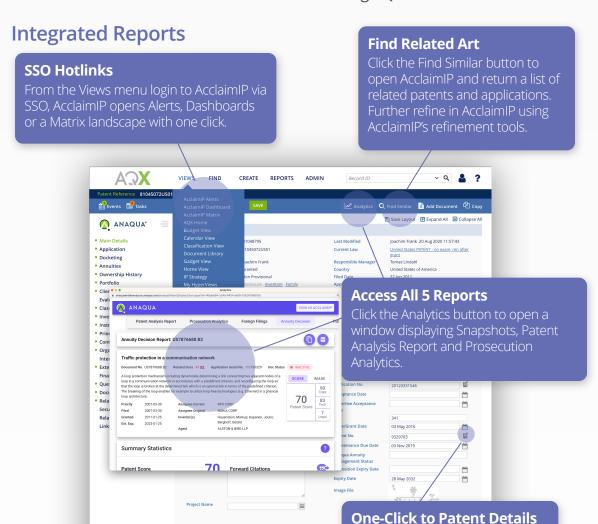
Patents can be exported from AcclaimIP in formats compatible with AQX's import formats. Go to Export>AQX Exports from the Search Results window.

### **Find Similar**

From either a patent or invention record, one click links to AcclaimIP and returns a list of similar patents. Often used for quick knock-out patentability research.

## **AQX Integrations with Public Data from AcclaimIP**

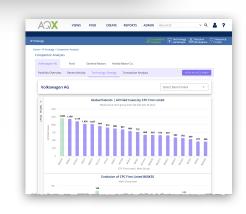
AcclaimIP is integrated with AQX to smoothly link users to AcclaimIP or access various data and visualizations without ever leaving AQX.



## **Integrated AcclaimIP Dashboards**

► TERMINAL DISCLAIMERS

Set up dashboards for your entire team in AcclaimIP, and access them from the "IP Strategy" gadget on your ANAQUA home page.



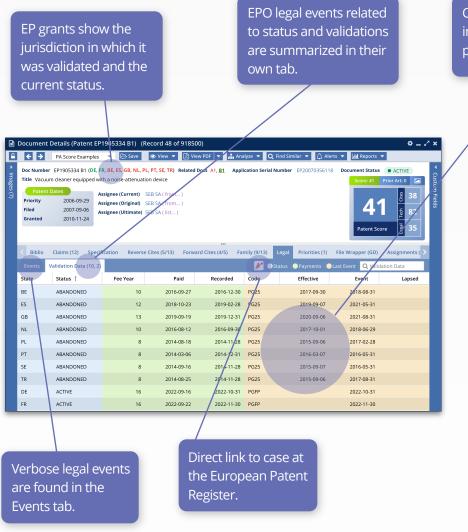
An icon next to the patent and/or

specific document in AcclaimIP.



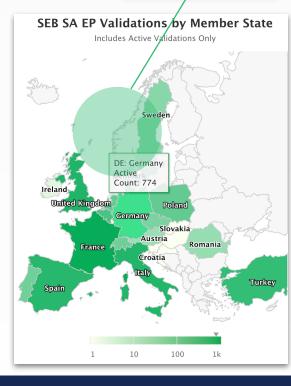
## **Analyzing EPO Publications and Validations**

European grants are displayed with parenthetical country codes indicating where they were validated. The colors indicate the current status of each validated state. Details are found in the Legal tab which is broken into two sub-tabs. The Events tab contains the full legal event record. The Validation Data summarized just the data related to status.



Color-coded columns indicate the type of data presented.

EP patents can be charted by their coverage and status in the charting package and on the dashboards.



## Intuitive

Just check the country codes and their colors to determine where the EP is currently in force. Red indicated once enforceable but currently dead.

## Seachable

20 field codes available for searching EP validatioin data found in the Field Code Guide. Search Playbook for EP Validations.

## **Full EPO Legal Events**

Along with summary of events related to the EP validations, the Events tab contains the full set of searchable EP legal events.

## **Charts & Dashboards**

Chart EP patents by their validated jurisdictions and their status get get a full picture where a patent family is in force.