syncIDS

User’s Manual Version 1.2

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Introduction

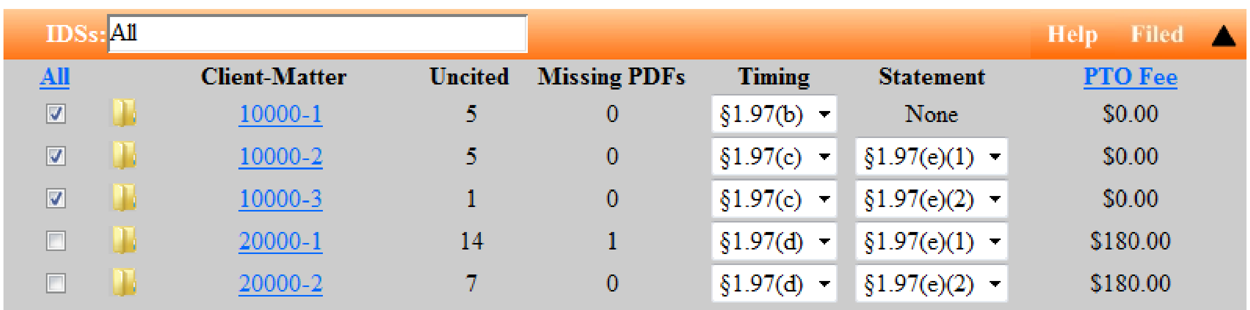
SyncIDS is a prior art database. When new documents or matters are added to the database, SyncIDS automatically shows all of the IDSs that need to be filed, and everything needed to file each IDS is automatically placed in a separate folder including a completed 1449 form and any non-U.S. PDFs.

SyncIDS is divided in to four sections. (1) The IDS section automatically generates IDSs that need to be filed. (2) The client section allows you to view and modify information for each client such as the default filer and prior art categories for that client. (3) The matter section allows you to view and modify information for each matter such as the first inventor's name and any related matters. (4) The document section includes all of the prior art for a matter.

Each section of SyncIDS is described below. You can also right-click on any item within SyncIDS for detailed help on that item. For example, right-click on a button to see what that button does, right-click on an input field to see examples, or right-click on a whole section to find out how to use that section.

IDS Section

The IDS section automatically generates IDSs that need to be filed.



IDSs: All   Help   Filed

All		Client-Matter	Uncited	Missing PDFs	Timing	Statement	PTO Fee
☑		10000-1	5	0	§1.97(b)	None	$0.00
☑		10000-2	5	0	§1.97(c)	§1.97(e)(1)	$0.00
☑		10000-3	1	0	§1.97(c)	§1.97(e)(2)	$0.00
☐		20000-1	14	1	§1.97(d)	§1.97(e)(1)	$180.00
☐		20000-2	7	0	§1.97(d)	§1.97(e)(2)	$180.00

IDSs Field

You can use the "IDSs" input box to filter your view of IDSs that need to be filed. You can filter by the email address of the filer, a client number, a docket number, or the word "All."

Examples

"All" shows all matters that have an uncited reference for your entire firm.

"joe@firm.com" shows all matters that have an uncited reference for this user.

"10000" shows all matters that have an uncited reference for this client.

"10000-All" shows all matters for this client (even matters where no IDS is needed).

"10000-1" shows this one matter (even if no IDS is needed)

Help Button
You can right-click on any item within SyncIDS for detailed help on that item. For example, right-click on a button to find out what that button does, right-click on an input field to see examples, or right-click on a whole section to find out how to use that section. You can also contact us at info@syncids.com .

Filed Button and Checkboxes
After you file an IDS, check the corresponding box on the left and then press the "Filed" button in the upper-right corner. After you press the "Yes" button to confirm that the checked IDSs have been filed, the references in those IDSs will be checked off as cited for those matters so they are not cited again. Matters that are missing one or more required fields from the client and/or matter sections below cannot be checked.

Open/Close Arrow
Click on the open/close arrow to open and close the IDS section. Keeping the IDS section closed when not in use improves the response time of the other sections. Opening the IDS section may take several seconds.

All Button
Press the "All" button to check or uncheck all of the check boxes in the IDS section. Matters that are missing one or more required fields from the client and/or matter sections below cannot be checked.

Folders
The folders contain everything you need to file each IDS including a completed 1449 form and PDFs of any required prior art references.

Client-Matter
Click one of these hyperlinks to go directly to that client and matter in the client and matter sections below.

Uncited
The "Uncited" column indicates the number of uncited references for each matter.

Missing PDFs
The "Missing PDFs" column indicates the number of missing PDFs for each matter. If foreign patents or non-patent literature is cited, a copy of the reference must be submitted with the IDS. Copies of U.S. patents and publications are not required.

Uploading

You can upload a missing PDF by left-clicking on the corresponding blank document icon in the documents section below. You only need to upload each document once. Any other matters that cite that same document will automatically use that copy. Once a document is uploaded, left-clicking on the PDF icon for that document will open that document. You can correct an already uploaded document by right-clicking on the PDF icon for that document.

Timing, Statement, and Fees

Timing

The "Timing" column allows you to select the correct time period for each IDS. IDSs must be submitted within one of the three time periods defined by 37 C.F.R. §1.97. Pop-up help will appear when you hover the cursor over one of the drop-down menus to help you select the correct time period. Always select the <u>first</u> correct time period.

Statement

The "Statement" column allows you to select the correct certification statement for each IDS. Pop-up help will appear when you hover the cursor over one of the drop-down menus to help you select the correct certification statement. Always select the <u>first</u> correct certification statement. If the current time period is defined by 1.97(d), and neither of the certification statements is correct, you may need to file a continuation to change your time period and have the references considered.

PTO Fees

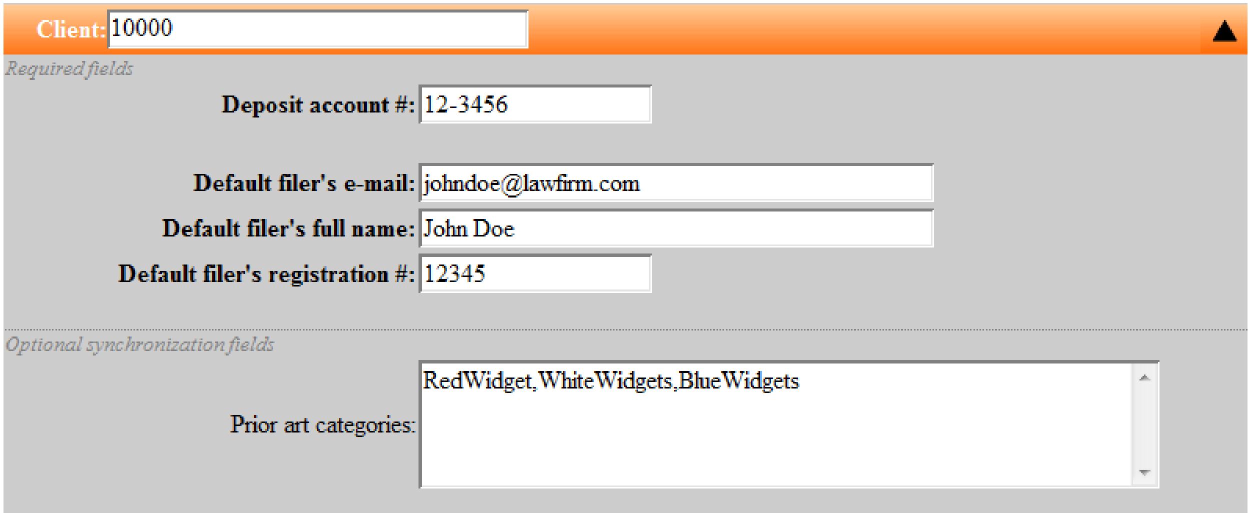
Depending on the time period and certification statement, the PTO may require a filing fee. If that fee is required, it will be automatically reflected in the "Fee" column, and a request to debit your deposit account will be automatically included with your IDS. Each client may have a different deposit account number entered in the client section below.

Our Fees

SyncIDS charges $40 for each IDS you file. There is no upfront cost, no annual license fees, and no storage fees. Invoices are broken down by client-matter number for cost recovery.

Client Section

The client section allows you to view and modify information for each client.



Client Number

Enter a new client number in the “Client” input box to add a new client. Enter an existing client number to view or modify information for that client. Optionally, you may include the client name in parenthesis.

> **Examples**
> “10000” opens client number 10000.
>
> “10000 (Widgets Inc)” opens client number 10000 and assigns the name “Widgets Inc.”

Open/Close Arrows

Click on the open/close arrow to open and close the client section.

Deposit Account Number

Enter a PTO deposit account for this client here. Any IDS filing fees for this client will be charged to this deposit account with a request to the PTO to note the appropriate docket number.

> **Example**
> “12-3456” sets this deposit account number for this client.

Default Filer’s Email, Full Name, and Registration Number

Enter the email address, full name, and registration number of the patent attorney or agent that is primarily responsible for this client. This default filer may be over-ridden on a per matter basis in the matter section below.

Examples
"john@doe.com" will set this attorney or agent as the default filer for this client and will automatically enter his name and registration number if this information has been previously entered.

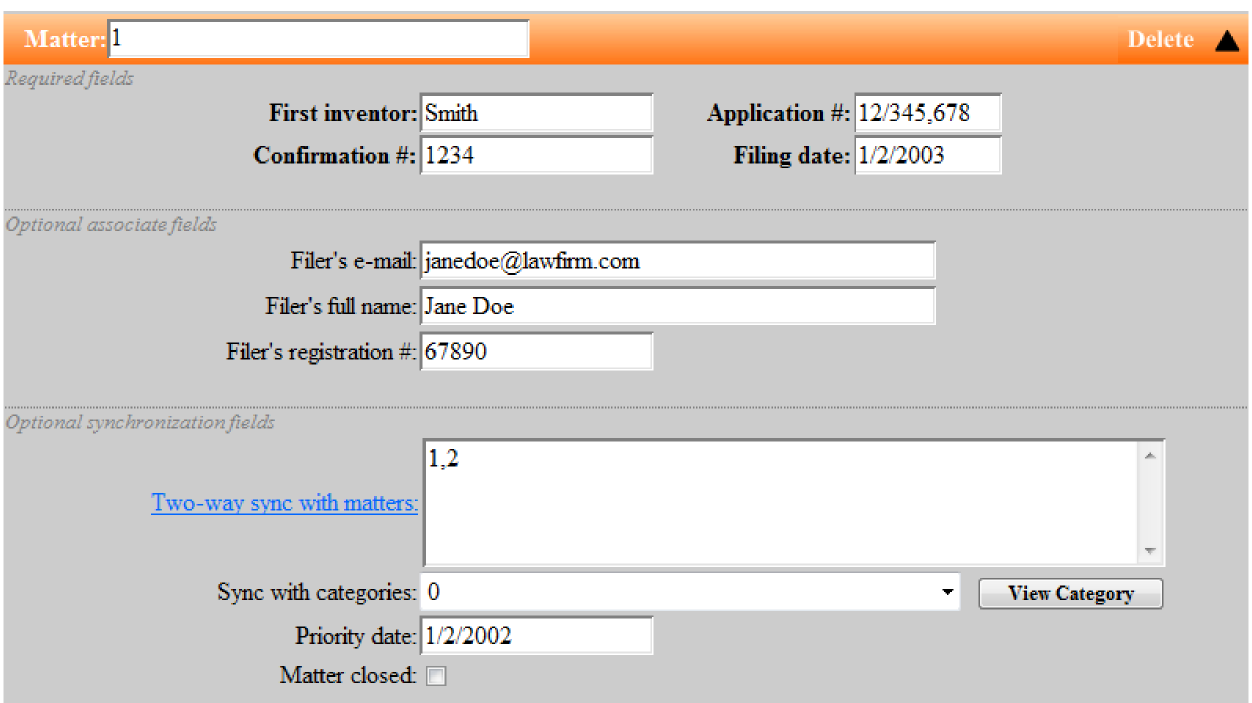
"John Doe" will set "/John Doe/" as the default e-signature for this client.

"12,345" associates this registration number with this attorney or agent.

Prior Art Categories
Optionally, you may enter a comma separated list of categories for each client. Categories may be added or deleted at any time. These categories may then be used below to characterize matters and prior art documents. Matters and documents may belong to more than one category. Categorized documents are automatically added to similarly categorized matters. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

Example
"Red Widgets, White Widgets, Blue Widgets" will establish these three prior art categories for this client.

Matter Section – Basic Information
The matter section allows you to view and modify information for each matter.



Matter Number
Enter a new matter number in the “Matter” input box to add a matter to the client indicated above in the client section. Enter an existing matter number to view or modify information for that matter.

> **Example**
> “10000” opens matter number 10000.

Delete Button
Press the “Delete” button and then the “Yes” button in the confirmation request to permanently delete a matter. Deleting a matter has no effect on matters that are synchronized to the deleted matter.

Open/Close Arrow
Click on the open/close arrow to open and close the matter section.

Required Fields – First Inventor, Application Number, Confirmation Number, and Filing Date

> **Examples**
> “John Doe” enters this person as the first inventor for this matter.
>
> “12/345,678” or “12345678” enters this number as the application number for this matter.
>
> “1234” enters this number as the confirmation number for this matter
>
> “1/2/03” enters this date as the filing date for this matter.

Filer’s Email, Full Name, and Registration Number
Enter the email address, full name, and registration number of the patent attorney or agent that is responsible for this particular matter here.

> **Examples**
> “jane@doe.com” will override the default attorney or agent for this client with this attorney or agent.
>
> “Jane Doe” will set “/Jane Doe/” as the e-signature for this matter.
>
> “67,890” associates this registration number with this attorney or agent.

Matter Section – Optional Synchronization
Synchronizing matters to other matters and/or prior art categories enables SyncIDS to automatically generate all of IDSs that need to be filed when new documents or matters are added to the database.

Two-Way Sync
Synchronizing matters using the two-way sync feature ensures that the art cited in the synchronized matters is identical. When two or more matters are synchronized for the first time, duplicate references are automatically removed. After that, when a reference is added to one matter in a family, the reference is automatically added to all of the other matters in that family. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

If a group of matters are already synchronized, you only need to enter one of those matter numbers to have the current matter join that entire group. You can click on the "Two way sync with matters" label to switch to one-way import (described below). Alternatively, or in addition, you may establish prior art categories (described below) and keep matters up to date in that manner.

Examples
"2" will synchronize references between the current matter and matter 2.

"1,2,3" will synchronize the prior art between all of these matters.

One-Way Import
Use the one-way import feature to copy all of the art from other matters to the current matter. Duplicates are automatically removed. Updates to the other matters will also be copied to the current matter unless the relationship is removed. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

You can click on the "One way import from matters" label to switch to two-way synchronization (described above). Alternatively, or in addition, you may establish prior art categories (described below) and keep matters up to date in that manner.

Examples
"2" will import references from matter 2 to the current matter.

"2,3" will import references from matters 2 and 3 to the current matter.

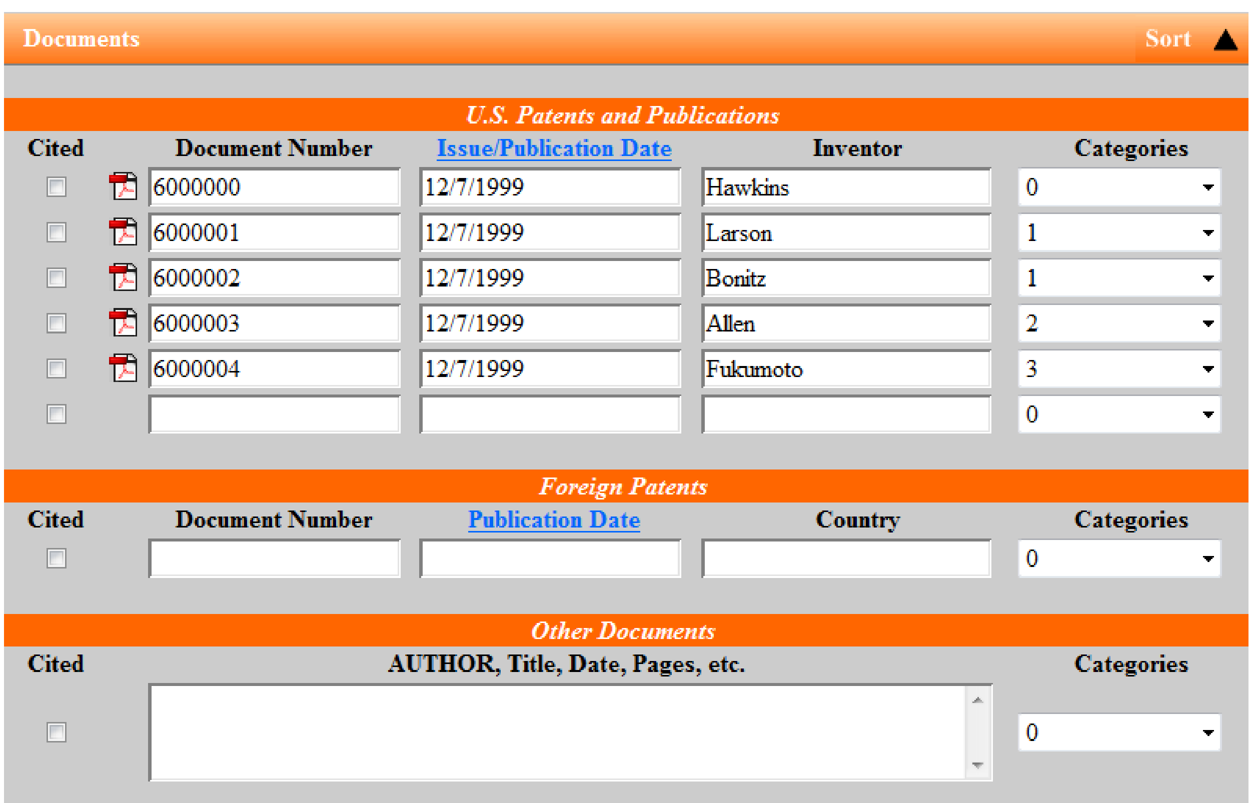
Sync with Categories
In the client section above, you may enter a comma separated list of categories for a client. These categories may then be selected in the "Sync with categories" drop-down menu to characterize the current matter. In the document section below, "Category" drop-down menus may be used to similarly categorize documents. Matters and documents may belong to more than one category. Categorized documents are automatically added to similarly categorized matters. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

View Category Button
Select one or more categories from the “Sync with categories” drop-down menu on the left, and then press the “View Category” button to view all of the documents for the current client in that category. Note, you will no longer be viewing just documents for a particular matter. If you want to see all uncategorized documents for this client, press the “View Category” button with no categories selected in the “Sync with categories” drop-down menu.

Priority Date
Optionally, you may enter a priority date for a matter. If you sync such a matter to a category and/or another matter, the priority date is used to avoid documents that are not prior art to the matter. If either the matter priority date or the document priority date is blank, the synchronized document is added to the matter. Priority dates for U.S. patents and publications are typically entered automatically by SyncIDS. You should always verify these priority dates by clicking on the date column header.

Matter Closed Checkbox
Check this box when a matter issues or goes abandoned to stop generating IDSs for that matter.

Documents Section
The documents section holds all of the prior art for a matter.



Sort Button
Press the “Sort” button to sort all of the documents in the current matter by document number. Note, cited documents are always listed before uncited documents.

Open/Close Arrow
Click on the open/close arrow to open and close the document section.

Cited Checkboxes
If the document has already been cited in this matter (e.g., in a previous IDS not filed using SyncIDS or cited by a Patent Office Examiner), check the “Cited” box on the left. If the “Filed” button in the IDS section above is pressed, the corresponding “Cited” checkboxes will be automatically checked.

PDFs
PDFs for U.S. patents and publications are automatically linked to FreePatentsOnline.com. You can upload PDFs for foreign patents and non-patent literature by left-clicking on the blank document icon. You only need to upload each document once. Any other matters that cite that same document will automatically use that copy. Once a document is uploaded, left-clicking on the PDF icon for that document will open that document. You can correct an already uploaded document by right-clicking on the PDF icon for that document.

U.S. Patents and Publications
When you enter a U.S. document number, the dates and inventor are typically entered automatically. Occasionally, you may have to enter that information manually. You should always verify the automatically entered priority date by clicking on the date column header. Remove a document number to delete that document from a matter. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

> **Batch Information Entry**
> You can enter multiple U.S. document numbers by separating them with semicolons. Again, the dates and inventor are typically entered automatically. If you select one or more categories for the documents before you enter the list, each document will be placed in those categories.
>
> > **Example**
> > 6000000; 6000001; 6000002

Foreign Patents
Enter the document number, publication date, and country for each foreign document in this section. You may also enter a priority date by clicking on the date column header. Remove a document number to delete that document from a matter. Note, deleted

documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

Other Documents
Enter the author, title, date, pages, etc. for each non-patent document in this section.

Priority Dates
The earliest date entered is considered the priority date for the document. Dates must include at least the first three letters of the month's name and a comma.

Examples
Jan 5, 2010 or January 5, 2010

Auto-Complete
If there are document descriptions already in the database for the current client that are similar to the one you are entering, document windows will pop up to assist you. You can select one of these descriptions with the mouse or the up and down arrow keys. Only three document windows are displayed at a time. If you do not see the document description you are looking for, use the right arrow button to view additional selections.

Deleting a Document
You can delete a document from a matter by removing the document 's description. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.

Categories
Optionally, in the client section above, you may enter a comma separated list of categories for that client. These categories may then be selected in the "Sync with categories" drop-down menu in the matter section above to characterize the current matter. Here, in the document section, the "Category" drop-down menus may be used to similarly categorize documents. Matters and documents may belong to more than one category. Categorized documents are automatically added to similarly categorized matters. Note, deleted documents may be manually added back to a matter, but will not be automatically added via synchronization with another matter or category.