patsnap
Getting Started with PatSnap Workspaces

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# The Importance of Collaboration

For those involved in innovation, building a strong patent portfolio is the best way of increasing business value. It not only blocks competitors but proactively promotes freedom-to-operate (FTO) by discouraging further patenting within a field. This can also enhance your bargaining power when it comes to potential investors and competitors, with a view to potential cross licensing opportunities.

At the same time, businesses are now finally beginning to integrate their patent strategy with their business strategy in order to create better alignment and more efficiency. To ensure the harmonic integration of protectable IP and the R&D vision, it is important to encourage a culture of collaboration and transparency. Cross-functional partnerships should be encouraged. Features, such as PatSnap Workspaces can be used to support this type of activity.

# The Role of Workspaces

Workspaces allow you to manage your work, capture important patents and create your own notes. You can then share that observation with your colleagues and work off the same dataset, as well assigning specific tasks to manage workflow. This will ensure there is no work duplication, which will make your work process much easier, organised and productive.

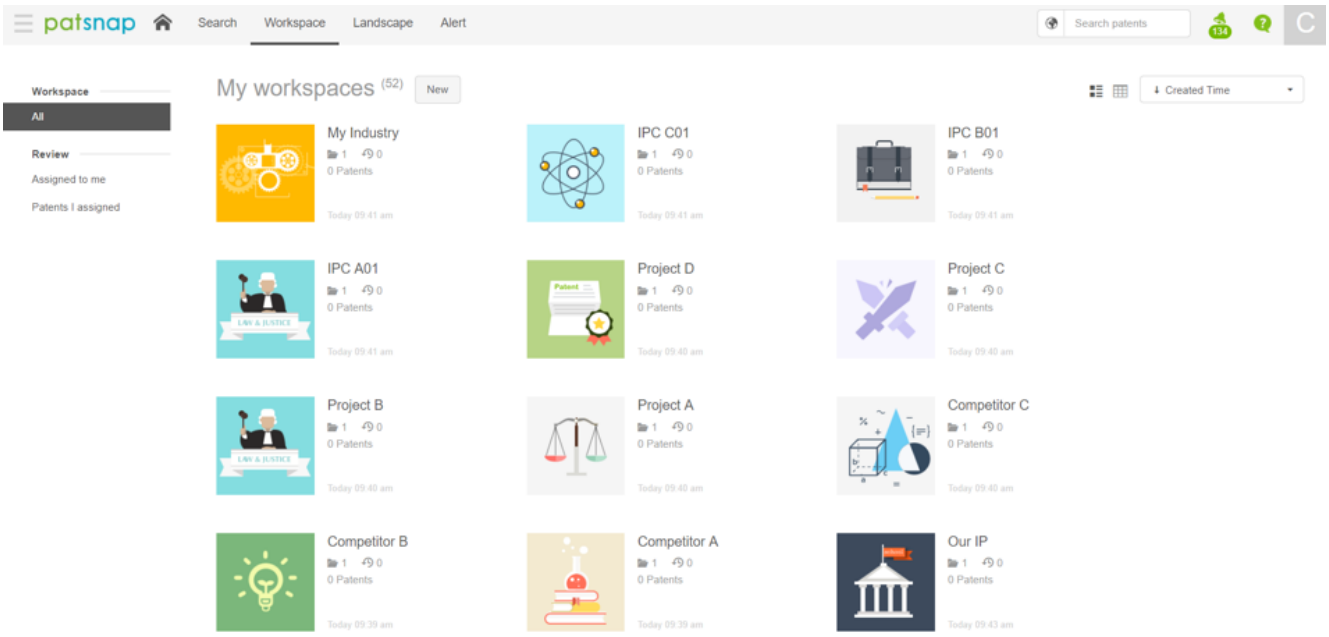
Workspaces caters to those interested in finding and exploiting the value of IP. Workspaces enables you to keep up to date with all the changes in any area of patents that you have decided to monitor. With the rapid pace of change in this current information and technology environment, keeping up-to-date on these changes is now a priority.

PatSnap's Workspaces provides an ideal forum for you to capture and manage what you find on the platform, including your IP portfolio, competitors' portfolios and general technology searches. Within each Workspace, you can create multiple folders that allow you to store up to 20,000 patents.

# The Role of Workspaces

Workspaces also allow you to:

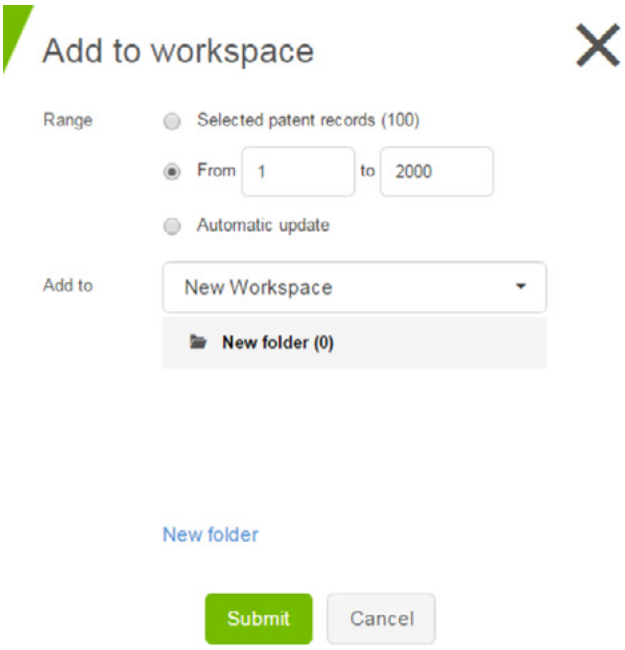
- Save patents that are interesting, or need to be worked on later
- Add your comments or customised fields to categorise your patents
- Filter through patents and move or copy them into different folders
- Share folders with colleagues so you can collaborate on a project or share your thoughts
- Set up automatic updates to have any new patents relevant to your interest automatically placed into the appropriate folders



# Creating a Workspace

The starting point before creating a Workspace is to establish the associated strategic objectives. These can either relate to internal projects, such as managing the current R&D pipeline, or external goals that encompass commercialisation via licensing and M&A targets. The Workspaces that you create will stem from the type of searches you originally conduct. Whether you are looking into different companies' patent portfolios, or delving into new technology areas, make sure you store your results in a Workspace with a clear label that easily relates back to key objectives.

Once you have conducted a search in PatSnap, you will see at the top of your results page the "Add to Workspace" button. Simply click this button and you will be given option to choose how many patents you would like to put into the Workspace. You can then select whether to put the patents in a new Workspace or put them into an already existing folder.




Within the Workspace overview you can also click '*New*' which will allow you to create to a Workspace where you can enter a '*Name*' and '*Description*' for the project before doing a search.

Finally, when you are setting up a Workspace, it's a good opportunity to review your SMART strategic objectives. Defining these goals and outlining them within the '*Description*' section of a Workspace will reinforce objectives to colleagues that are working on the project across the business.

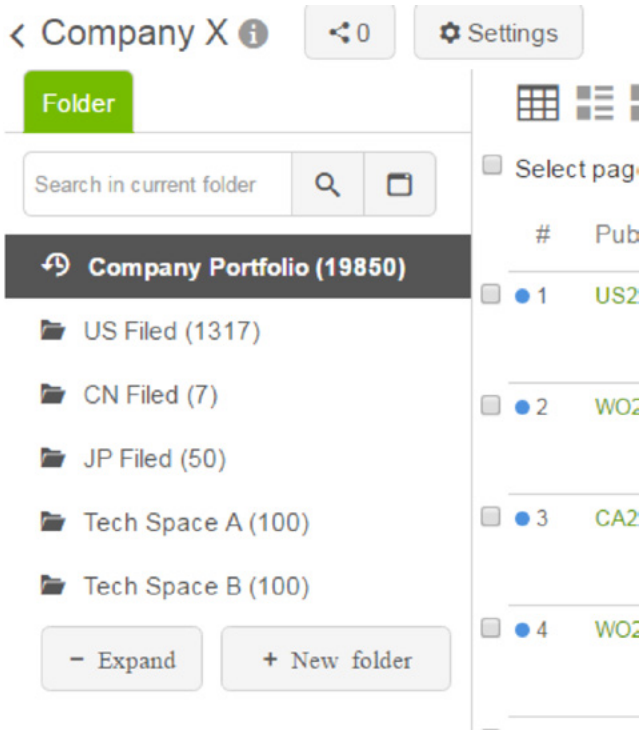
| CRITERIA | EXAMPLE |
|---|---|
| **S** - Specific | Acquire new products |
| **M** - Measurable | Expand aggregate portfolio by 12% |
| **A** - Agreed | Approved by VP of R&D |
| **R** - Realistic | EEA Region only |
| **T** - Time-based | By end of Q4 2019 |

# Managing Your Workspace

When you are constructing your own Workspace, it is recommended that you use a relevant naming convention for the projects to take into account the focus of the research. Examples of types of research might include:

**(i)** Technology areas you are specialised in
**(ii)** Types of products in your portfolio
**(iii)** Competitor monitoring

Workspaces gives you a number of management options to align your projects with business objectives, internal policies and research procedures. For example, creating folders and sub-folders within a workspace, that correspond to the stages of the product lifecycle can enable you to bridge the gap between the IP, scientific and regulatory functions of the business. It can depend both upon the regulatory process you are mandated by and the type of portfolio you are focusing on.




The *'Comments'* section provides an area where you can leave yourself or others notes relating to individual patents. This is key as you can remind yourself of any noteworthy information you've found within a patent. Comments can provide clear communication between you and your colleagues and aid in establishing effective collaborative portfolio management.

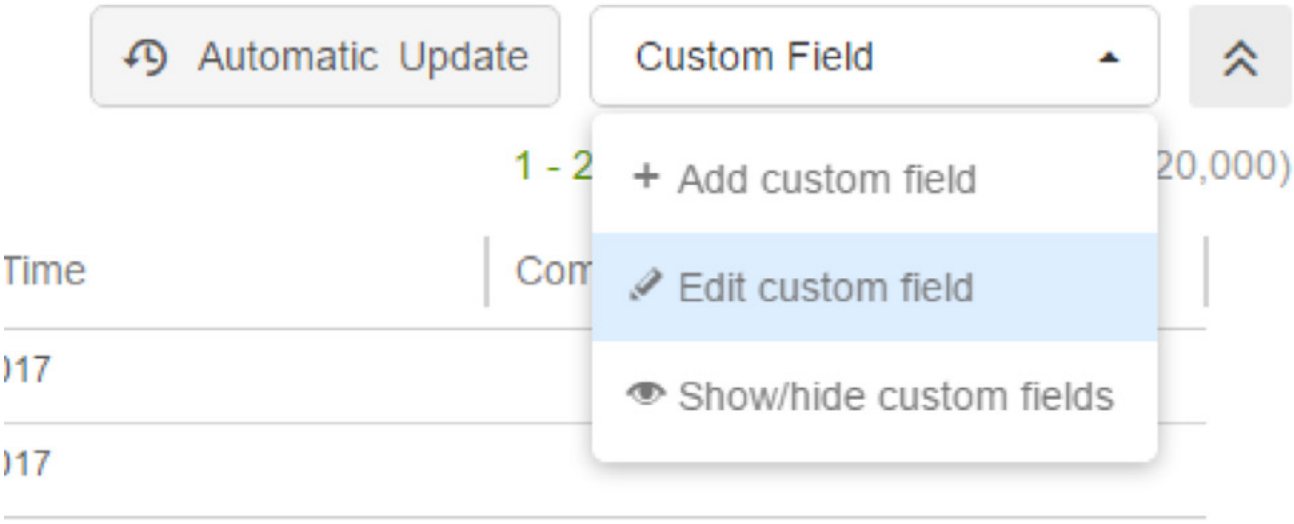
# Managing Your Workspace

| | # | Publication Number | Comments |
|---|---|---|---|
| ☐ | 1 | CN1540570A | tcorfield@patsnap.com: This is important |
| ☐ | 2 | CN100429670C | tcorfield@patsnap.com: Review further |
| ☐ | 3 | EP1411459A1 | |
| ☐ | 4 | USD562796 | |
| ☐ | 5 | WO1999048868A2 | |
| ☐ | 6 | US5548101 | |
| ☐ | 7 | US6825783 | |
| ☐ | 8 | WO1999048868A3 | |
| ☐ | 9 | US20040070530A1 | |
| ☐ | 10 | CN1026098C | tcorfield@patsnap.com: Not relevant |
| ☐ | 11 | US20140057950A1 | |
| ☐ | 12 | JP2004139596A | |

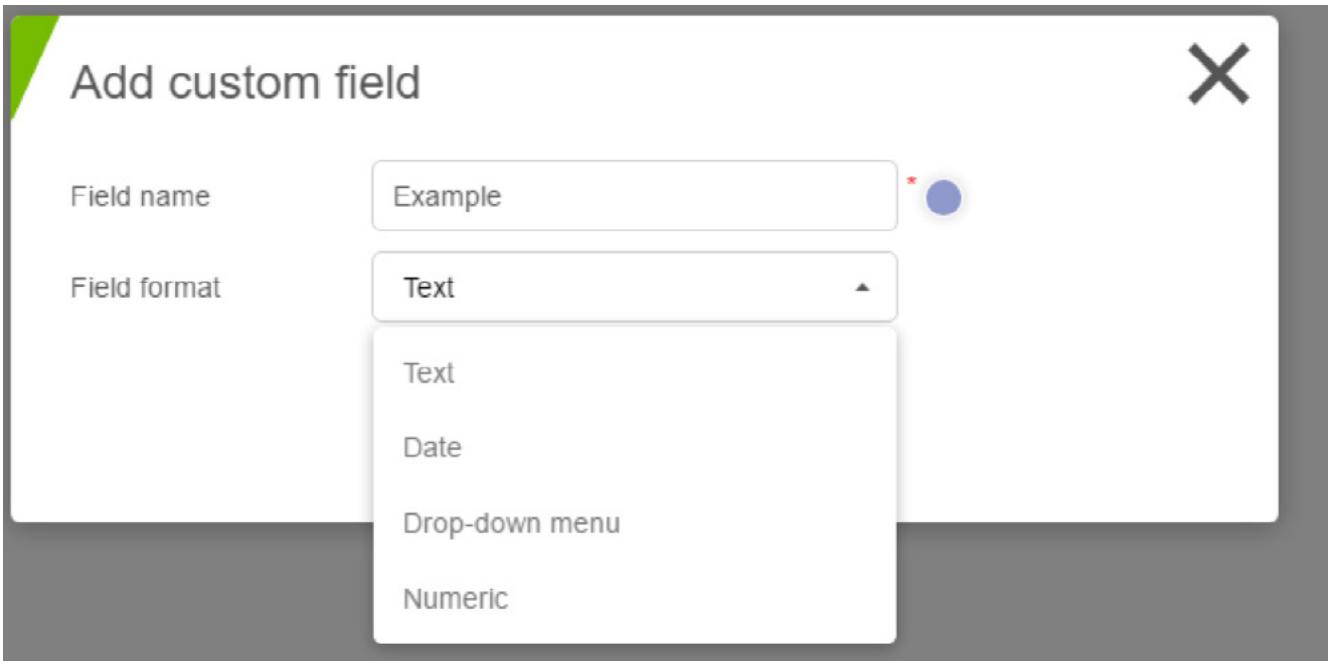
In order for your colleagues to work on the Workspace with you, they will need to have a PatSnap license.

# Custom Fields

When you want to record more data relating to a patent, or categorise it based on an internal metric or classification, you can add your own customised fields to the folder. This allows you to tailor each folder accordingly depending on your needs. In order to create a custom field, simply click on *'Custom Field'* within your Workspace.



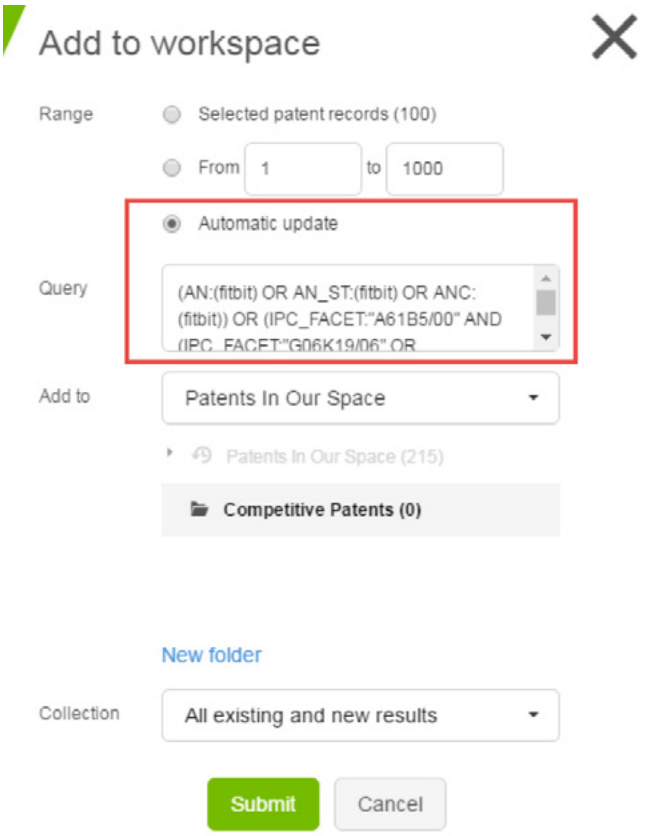

There are four types of fields you can add: *'Text'*, *'Date'*, *'Drop-down menu'* and *'Numeric'*. You can have as many of these custom fields as you like, and there is no limit to the amount of options you create in a drop-down menu. Once you have created your custom fields, you can sort your list of patents based on one of the criteria or information within them.



# Automatic Updates

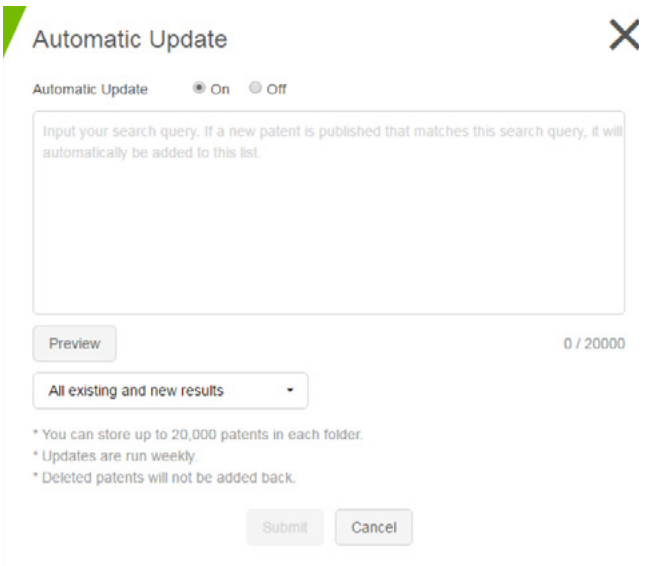
You will often find that the technology space you are looking into is still active, and therefore any searches you do are limited in terms of how long they will be relevant. To overcome that, a Workspace can be configured based on a query, which means it will be updated based on that query. There are two ways to achieve this:

## 1. Set up an automatic update for a folder when creating it




Once you have conducted a search and you are happy with a list of patents you can put them into a Workspace. While doing this, select the *"Automatic update"* icon and add this to the folder in the Workspace you are creating.

## 2. Add an automatic update to a folder after it has been created




Open the already existing Workspace in which you want to set up an automatic update. Select *"Automatic Update"* at the top right-hand side of the screen. Enter a search query and if a new patent is published that matches this search query, it will be automatically added to the Workspace.

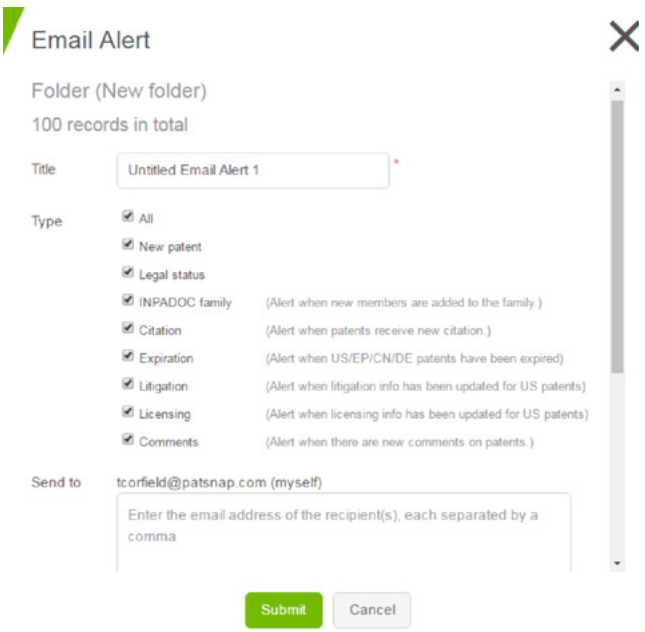
# Email Alerts

*'Email Alerts'* provide the backbone to keeping up to date on changes within company portfolios or technology areas. To set up an alert on a patent or a set group of patents you want to track, go to your already created folder within a Workspace and click on the email alert button.

The automatic email alerts enable you to be one of the first to know of a new technology or freedom to operate area. These alerts enable you to stay up-to-date on any new patents being filed or on any changes being done to the existing patents that you might be tracking. These changes may consist of:

- **Legal status** - e.g. Patents becoming invalid or withdrawn
- **INPADOC family** - e.g. When another application for that same technology gets filed elsewhere
- **Citation** - e.g. When any of your captured patents get cited by another patent
- **Expiration** - e.g. Patents are no longer active and expire
- **Litigation** - e.g. When any of the patents become involved in a litigation case
- **Licensing** - e.g. When any of the patents get into a licensing deal with another company
- **Comments** - e.g. When working on a shared folder you will be alerted when your colleague adds a comment

It is recommended that you create a *'Watch List'* folder to house patents you have identified as expiring and then set up an email alert to be notified when this patent is about to expire.

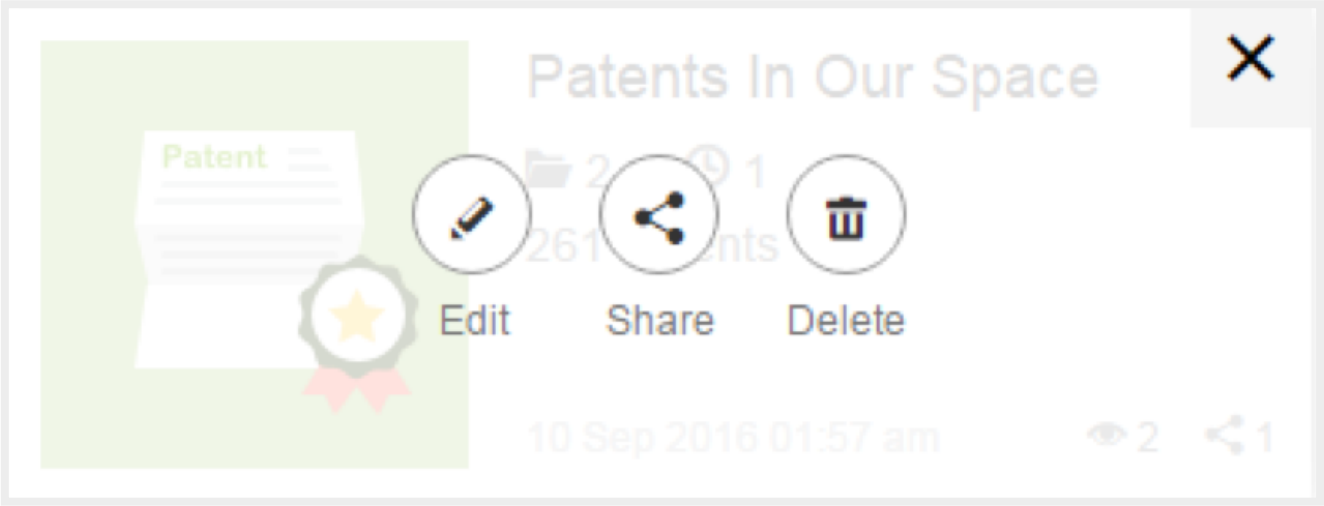


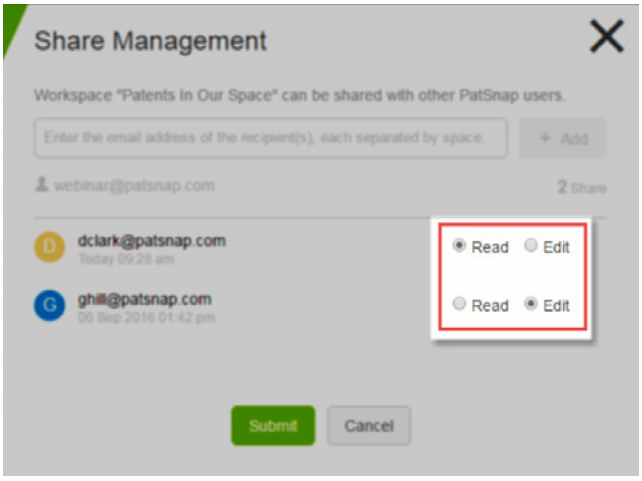

To set up an alert, click on the *'Email Alert'* button within Workspaces. You can set up an alert for folders or sub-folders within your Workspace. Then give the alert a title and select the type of information that you want to receive notifications on. Using the *'Send to'* box, add in the email addresses of anyone who is a relevant stakeholder for this project (e.g. Regulatory teams, Patent Attorneys and Research Scientists). The key thing to remember is that these alerts can be sent to absolutely anyone, regardless of whether they have a PatSnap account or not. Anyone who wants or needs to stay informed can do so by having their email address placed in the alert.

# Sharing Workspaces

Working through large numbers of patents can be time consuming. To get through patent portfolios as efficiently as possible, you have the option to share your Workspace with other PatSnap users. This promotes effective collaboration and leads to increased productivity. In some cases, sharing Workspaces provides the ideal system for tracking and managing different projects taking place within the same team or across two different departments.

Simply hover over the Workspace and click in the top right-hand corner and then go to *'Share'*. Here, you can enter the email address of anyone who has a PatSnap account – this is not restricted to a specific company or organisation, so you can share with external counsel, collaboration partners, etc.



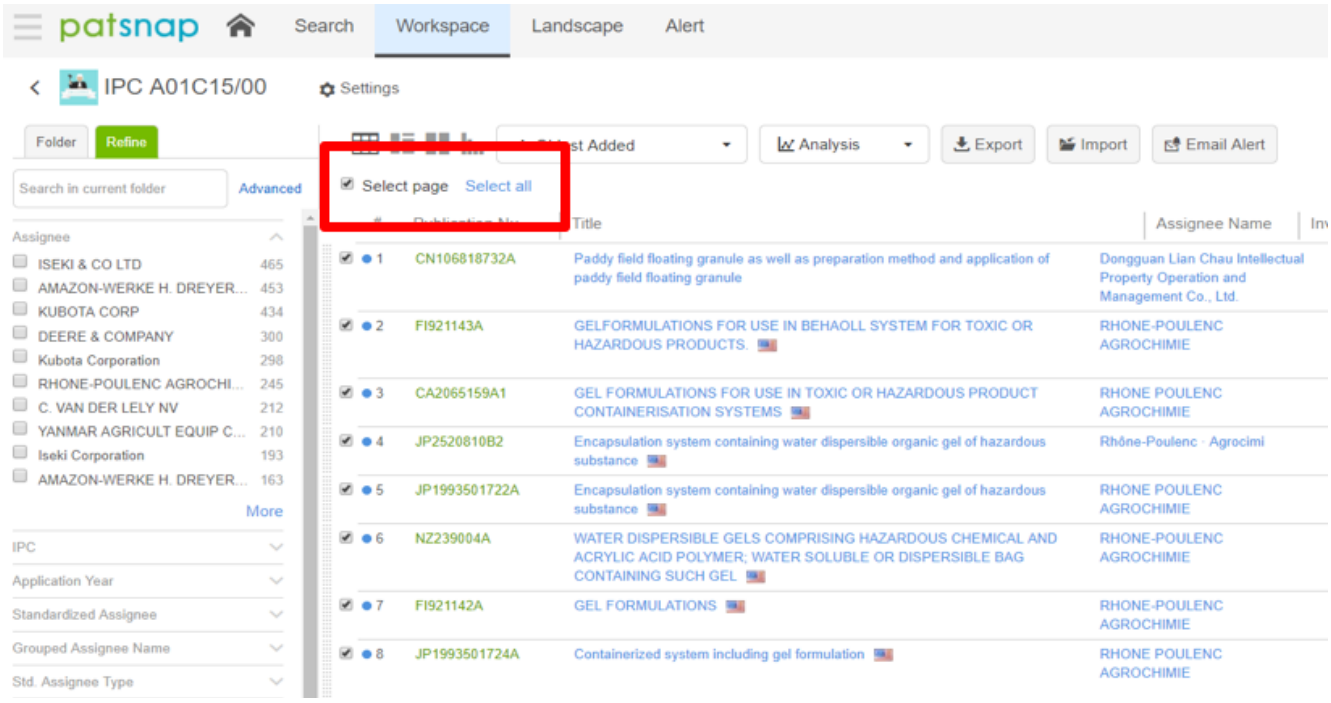




There are also different kinds of sharing in Workspaces, appropriate for different situations. Select *'Read'* to ensure the person you are sharing the Workspace with can only see your comments or the folders you have made. Select *'Edit'* if you want the other recipients to view everything that all users say and make their own edits. This is recommended for team projects.

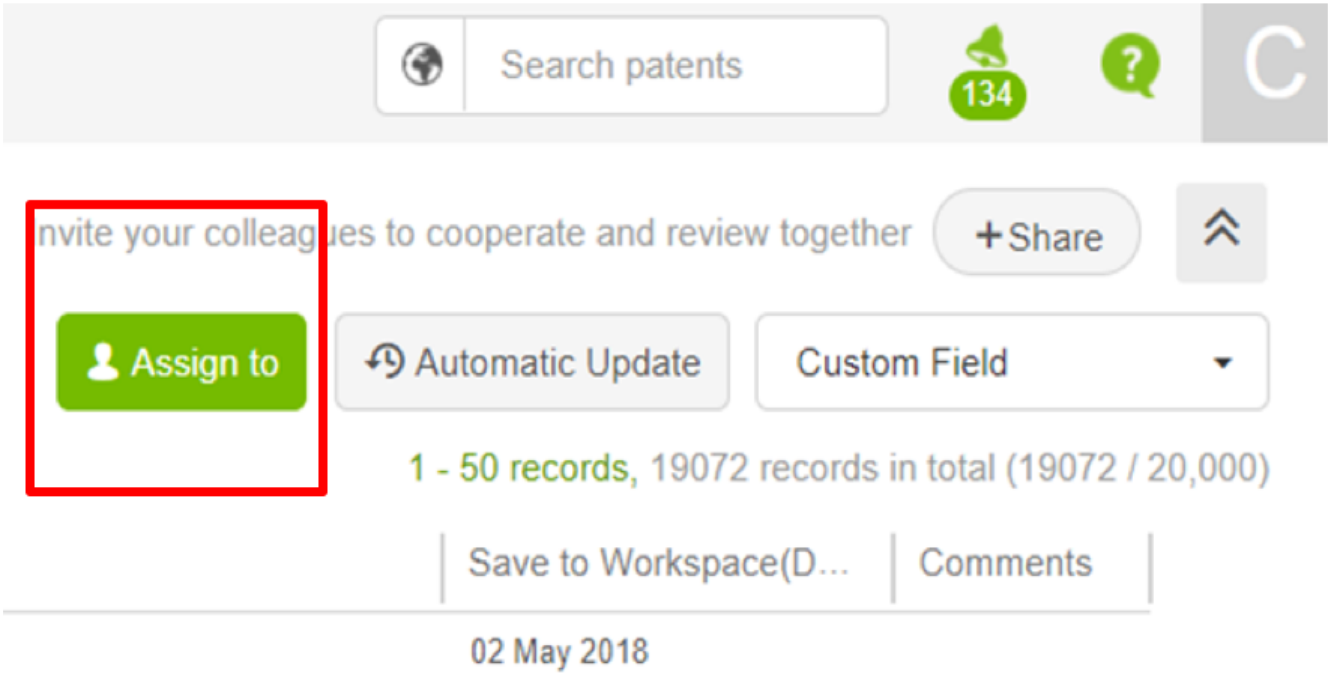
# Patent Review Tracker

Complex innovation projects often require collaboration between different teams and departments. To reduce email traffic and keep projects organised, PatSnap has introduced the Patent Review Tracker. Patent Review Tracker enables the user to allocate patents to other team members for review, and track the progress of their project. Deadlines can be set for time-sensitive tasks, and specific questions or instructions can also be given to the reviewer.

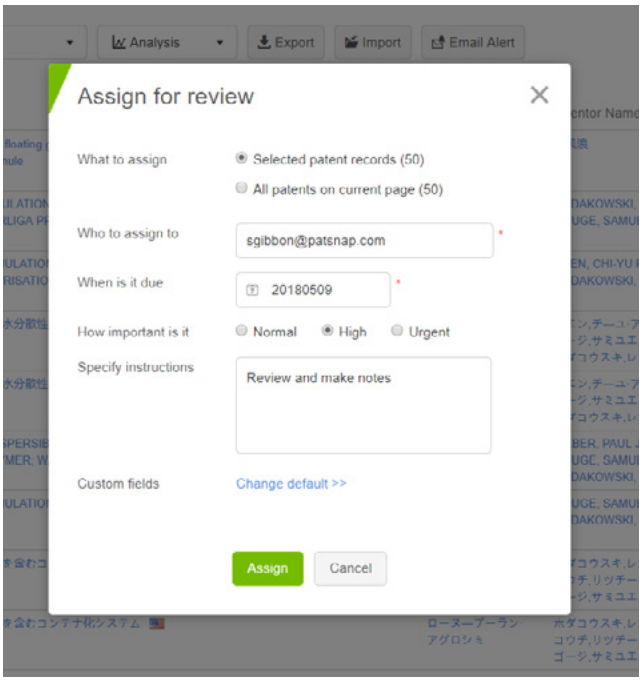
## 1. Select the patents you wish to allocate.




## 2. Then select *"assign to"* on the top right.

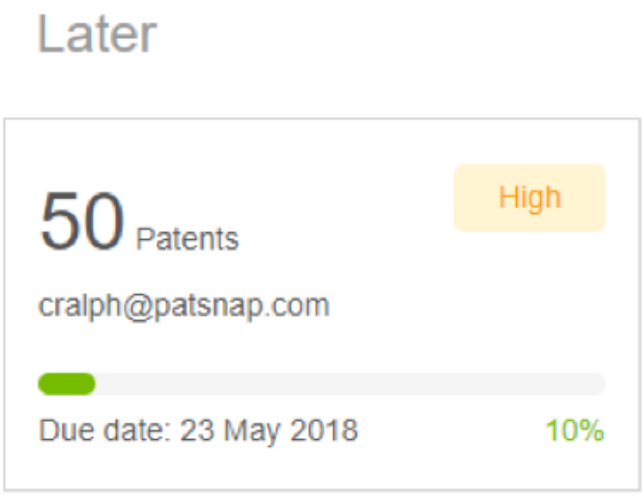


## 3. Assign Patents for Review.




This will bring up a pop-up menu where you will be able to select recipients, a completion date, set the priority level and provide the reviewer with any specific instructions.

## 4. Track the status of your project.




The recipient will then receive an email notification and the assignee will be able to review the progress of the task.

# Summary

There are three key steps that can be taken to increase transparency and communication across teams using Workspaces by PatSnap:

1. Adopt a naming convention for your Workspaces and relate these to company objectives and goals

2. Create a Workspace with customised fields and add comments so that anyone can review what research has been carried out

3. Share the Workspace with relevant stakeholders across the business

R&D teams, IP divisions and other business units must have a collaborative understanding of where their company's current portfolio and innovation scope is heading and review and tweak their strategies accordingly. Workspaces provides an ideal platform for this activity to be facilitated and encouraged, leading to alignment of teams and successful execution against company goals and targets.

# Innovators ask. PatSnap answers.

PatSnap answers the hardest questions encountered throughout the innovation life cycle—from creating new inventions to commercializing them.

The tool stores in one place all the information typically consulted by R&D and intellectual property teams—including millions of patents, scientific journals, litigation data, as well as company technology and financial profiles.

Our deep learning algorithms find patterns across these billions of data points, so you get game-changing insights in the blink of an eye.

Get your free demonstration today: **www.patsnap.com/contact**