poxoq for patents

User's Manual

poxoq for patents

Contents

Introduction

poxoq for patents is a patent downloading tool based on the free-searching interface of the European Patent Office, known as Open Patent Services (OPS). OPS is a web service application which allows users to access data free of charge from the HTML-based esp@cenet service in XML format.

poxoq for patents allows the download of documents in PDF format, allowing a choice of either complete patent documents, or parts of them, in a fast, reliable and convenient procedure starting with a publication number. Besides the complete patent document, the users can view and choose to download the available documents parts (cover page, abstract, description, claims, drawings, search report, amendments) individually or as a combination.

1. Download patent documents

To download patent documents, enter the publication numbers into the „Publication numbers" field, separated either by paragraph, comma, backslash, colon, semicolon, quotation marks or hyphen.

Please avoid commas and spaces within the publication number. Publication number formats like "US 6,258,784", for instance, are NOT supported; however, slashes used in US patent numbers (as in "US 2008/0098499", for example) are allowed.

Patent numbers can be entered with or without kind code. A space between the publication number and the kind code is permitted.
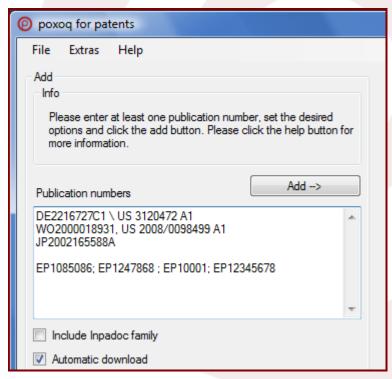

Image 1: Entering publication numbers to be retrieved.

Click on the "Add" button to start document retrieval. The progress bar above the "Publication numbers" field shows the progress of the retrieval. The retrieval can be stopped at any time by clicking on the "Stop" button.
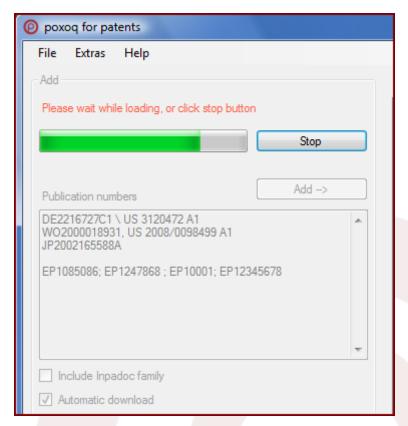
Image 2: Retrieving patent documents.

The patent numbers which could be retrieved from OPS are displayed within a tree structure in the central panel. Please note that only patent numbers for which a PDF document is available are displayed. However, if the download includes the Inpadoc family, all the members are shown in the tree, even though no PDF is available.
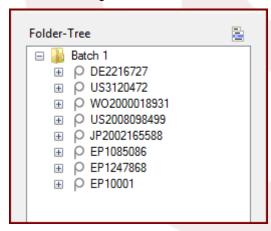

Image 3: Tree structure with retrieved documents.

The patent numbers which could not be retrieved are returned to the "Publication numbers" field, and a message is shown in the "Info" panel.
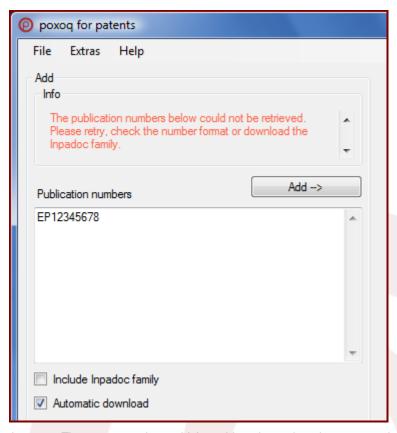
Image 4: The patent numbers which could not be retrieved are returned to the input field.

There could be several reasons for a failed retrieval:

- The connection to OPS has failed. Retry the download by clicking the "Add" button again.

- The format of the publication number is incorrect. poxoq for patents automatically converts publication numbers from most database sources (STN, Dialog, Epoque) into a suitable format for the OPS web service. The format, however, cannot be corrected if it is completely wrong. For example, it is not possible to correct the publication number "EP12345678" into an accepted format - only up to seven digits are allowed after the country code when entering EP publication numbers. For the correct format of the most important publication numbers, please check Appendix A or the link on the Esp@cenet website.

- The PDF document for the publication number requested is not available through the OPS web service. In many cases, you can circumvent this problem by downloading the Inpadoc family. From the list of Inpadoc family members, you may be able to find publications from which the document is available.
For example, if you look for the patent document "NL184196B", no PDF document will be retrievable. However, if you click the option "Include Inpadoc family", you will find several publications from the family members through which the PDF document would be available (e.g. in English), as in "US 3961046 A", or "FR 2293218 A1", "DE 2553998 A1", "CA 1059908 A" and others.
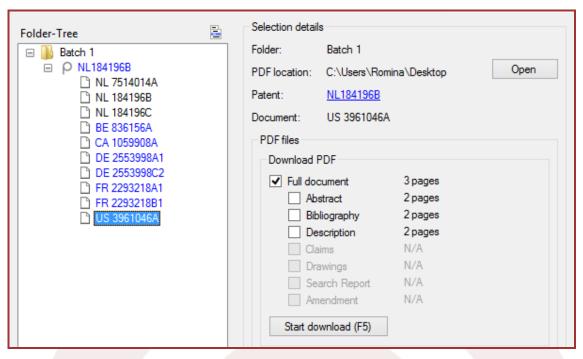
Image 5: The PDF document "US3961046A" can be downloaded instead of "NL184196B" via Inpadoc family.

2. Tree structure

The patent documents which are available in PDF form from the OPS web service are listed in the middle panel of the tree structure.

The tree has a three-level structure:

- Folder: for every batch download. Name and download location can be defined in the panel "Batch options" (see below).
- Patent document: the patent document retrieved from the OPS web service.
- Publication documents: the different publications for the patent document.

Depending on the selection, the following can be performed with a right mouse click:

Remove folders from tree

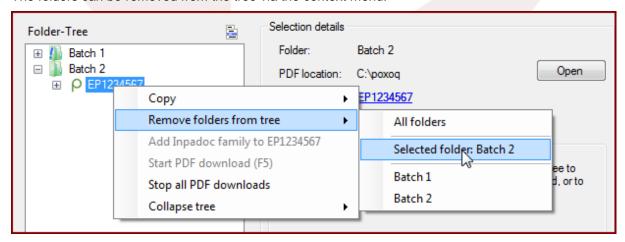The folders can be removed from the tree via the context menu.

Image 6: Removing folder(s) from the tree.

Removing folders does not affect the documents already downloaded.

Stop all PDF downloads

The downloads in progress can be stopped all together at any time by selecting "Stop all PDF downloads". The downloads already completed will not be affected.
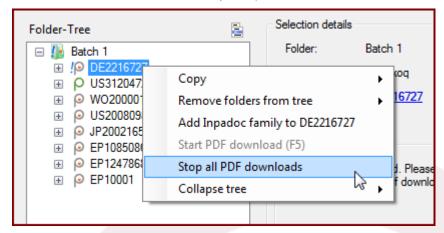

Image 7: Stopping all PDF downloads.

Copy

The selection in the tree can always be copied via the context menu, or with "Ctrl + C". Furthermore, you can decide whether to copy the selection only, or to include all the publications relating to a selection. The selection is copied in the clipboard and can be pasted as such, as in an Excel sheet.
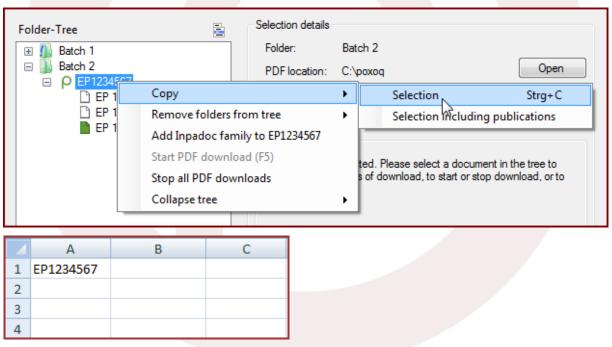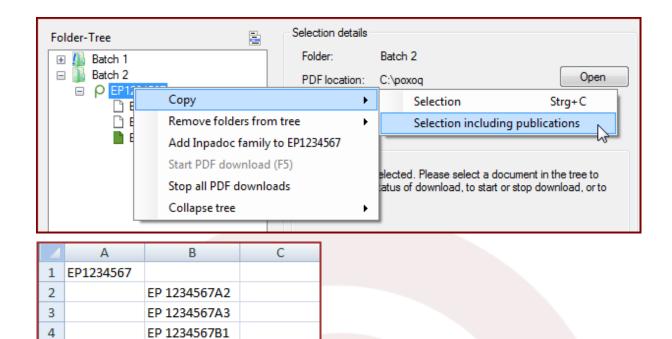

Image 8: Copying selection.

Image 9: Copying selection that includes publications.

Collapse tree

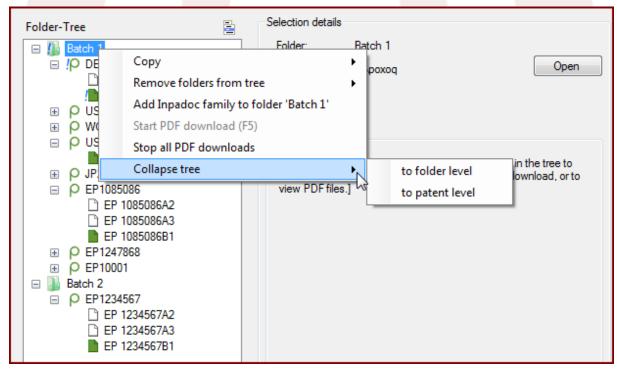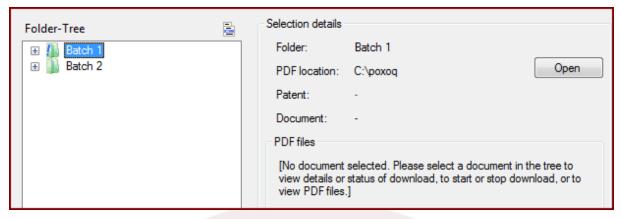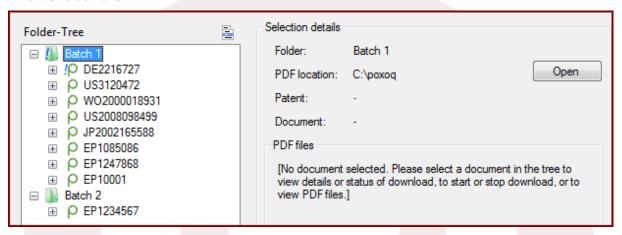The tree structure can be collapsed to the folder level or to the patent document level.

Image 10: Collapsing tree...

... to the folder level…

... or to the patent level.

The tree icons

A set of icons indicate the status and progress of the download:

Icons at the folder level	
	yellow folder: no publication in the folder has been previously downloaded
	blinking orange dot in yellow folder: publications in the folder currently downloading
	green folder: all publications in the folder have been downloaded
	blinking orange dot in green folder: currently downloading publications to a folder, where other publications have already been successfully downloaded
	red folder: download of at least one publication in the folder has failed
	blinking orange dot in red folder: currently downloading publications to a folder, where at least one previous download has failed

Icons at the patent document level	
	grey "ρο⋉oq": no publication for the patent previously downloaded
	blinking orange dot in grey "ρο⋉oq": publications (or Inpadoc family) for a patent currently downloading
	green "ρο⋉oq": all publications for a patent have been downloaded
	blinking orange dot in green "ρο⋉oq": downloading publications (or Inpadoc family) for a patent for which other publications have already been successfully downloaded
	red "ρο⋉oq": download of at least one publication for the patent has failed
	blinking orange dot in red "ρο⋉oq": currently downloading publications (or Inpadoc family) for a patent for which the download has previously failed

Icons at the publication level	
	blinking orange dot in white document: publication currently downloading
	green document: publication has been downloaded
	red document: publication download has failed

Other icons	
or	blue exclamation mark: a blue exclamation mark in front of any icon means that a remark has been added to a patent or a publication.

3. Selection details

The user of ℘ℴ𝓍ℴ𝓰 𝒻ℴ𝓇 𝓅𝒶𝓉ℯ𝓃𝓉𝓈 has the ability to view details of the download in the right panel. By selecting the batch, the patent document, or the single publication number, the user can more easily view these corresponding details.

The upper side of the right panel summarises the selection details, for example the name of the folder, the patent document or the publication, as well as the location where the document was downloaded to. The patent document is linked to Esp@cenet.
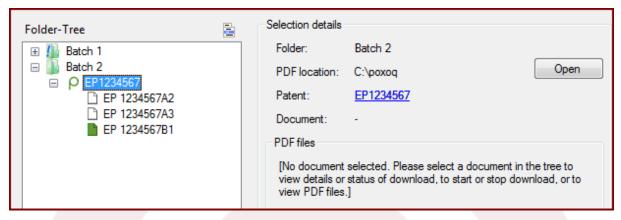

Image 11: Selection details of a patent document.

The lower part of the panel shows the details of a publication, or which parts are available for download.
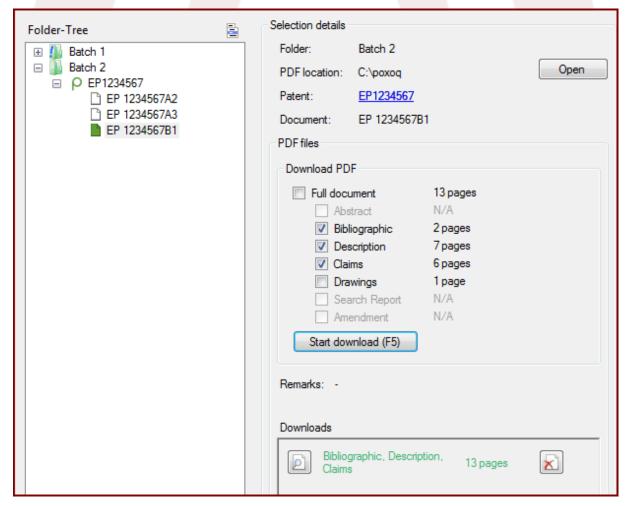

Image 12: Selection details of a single publication.

At any time, the user can download parts of a document other than the ones previously downloaded by simply selecting the sections to be downloaded, and then clicking on "Start download". N/A stands for "not available". The default selection is "Full Document".

The downloaded documents are listed in the "Download" section, where the user can also check the progress of the download.

Image 13: Checking the progress of the download.

When the download is complete, one can directly view the document by clicking the icon on the left: [icon]. Downloading can be stopped at any time by clicking the icon on the right: [icon]. The same icon allows the user to delete the PDF document and remove it from the list.

Image 14: List of the different downloads.

The field "Remarks" alerts the user when the download will have different results from what was requested.
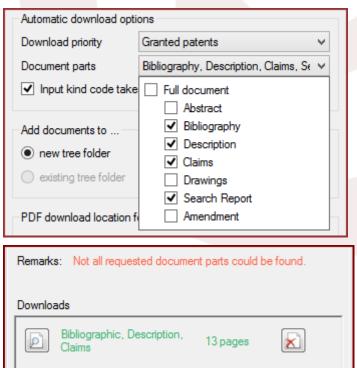

Image 15: For the document "EP1234567", the requested search report is not available.

4. Download Inpadoc family

An Inpadoc patent family is defined as comprising all the documents directly or indirectly linked via a priority document. According to this definition, two documents with no common priorities, which are "related" via another document, will belong to the same family. This can result in Inpadoc families with over 1,000 family members.

Downloading the family members could be useful when looking for patent documents in a language other than English. As a patent application may be filed for the same invention in a number of different countries, a document which describes the invention in different languages may be available.

The Inpadoc family is also useful when the documents requested to be downloaded are not available through the OPS web service. The PDF document, then, may in fact be available for another family member.

To download the Inpadoc family, the user needs to simply activate the checkbox „Include Inpadoc family". The members of the Inpadoc family are then added to the other publications in the tree view. The publications of the requested patent number are in black, whereas the additional Inpadoc family members are in blue. When the Inpadoc family has been downloaded, the patent number itself will be in blue.

Example: Entering the publication number "EP 100000" retrieves the publications "EP 100000 A2" and "EP 100000 A3." The Inpadoc family includes, aside from "EP 100000 A2" and "EP 100000 A3" in black, "DE 3227708 C1", "IN 161031 A1", "JP S59024197 A", "JP S61004198 U", "SU 1217267 A3" and "US 4544027 A" in blue.
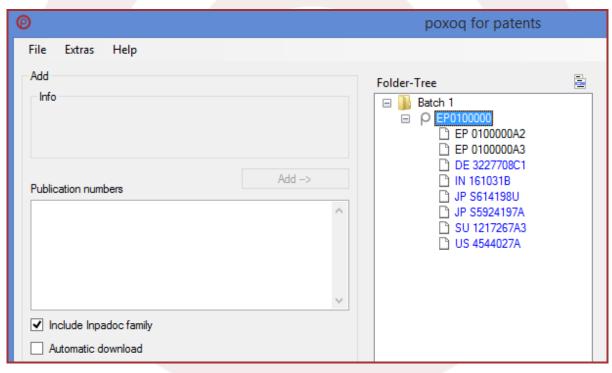

Image 16: The Inpadoc family relating to "EP100000".

An overview of the countries covered by the Inpadoc family can be found on the EPO website https://www.epo.org/searching-for-patents/helpful-resources/data/tables.html under the link "Contents and coverage of the PFS bibliographic file".

The Inpadoc family of a patent in the folder-tree can be downloaded at any time via the context menu. To do this, select a batch, a patent number, or one of the publication documents, and then right mouse click.
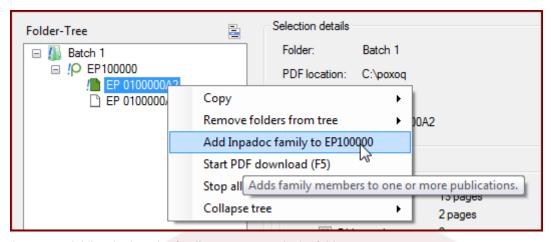
Image 17: Adding the Inpadoc family to any patent in the folder.

5. Automatic download

When the option "Automatic download" is selected, the download of the patent documents automatically starts as soon as the patent numbers have been retrieved and added to the tree structure. The user of ρoχoq ℓor ρatent can define the rules for the automatic download in the panel "Automatic download options". Here one can determine the download priority and the document parts to be downloaded.

- **Download priority**:

  If no kind code is entered along with the publication number, the user can download, by choosing among the various available publications of a patent number, granted patents or patent applications. The prioritisation algorithm has been especially formulated to take into account the differences in the kind codes of the major patent countries (EP, WO, US, DE, GB, FR, JP, CN, and CH).
  The rules for downloading priority are also applied when one enters a "wrong" kind code, as in a kind code which does not exist as such on the OPS web service.
  The user can also choose to download all available documents to a patent number.

  If the kind code is entered along with the publication number, the user has two options (checkbox "Input Kind Code takes priority"):
  - the download prioritises the entered kind code over the other download options
  - the entered kind code is ignored and the document is downloaded as if no kind code was entered (see above)
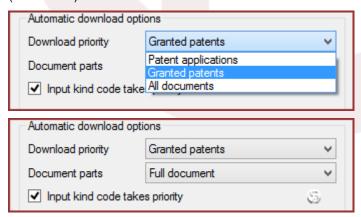

Image 18: Options for automatic download.

- **Document parts to be downloaded**: The user can choose which parts, or combination of parts of the document are to be downloaded from the following categories: Abstract, Bibliographic data, Description, Claims, Drawings, Search report, Amendments. If the requested document parts are not available on the OPS web service, a message will be displayed in the right panel.
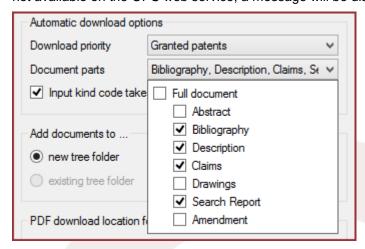

Image 19: Choosing the document parts to be downloaded.

Japanese full text documents

A special rule applies to Japanese publications. poxoq for patents automatically retrieves the PDF document of the JP-A-publication when you enter a JP-B-publication number which cannot be retrieved on OPS. A message will be displayed in the right panel if this is the case.

Manual download

The download can be started at any time for a single publication by selecting the publication number required in the tree structure, and pressing F5. Alternatively, the PDF document can be downloaded by selecting "Start PDF download" in the context menu.
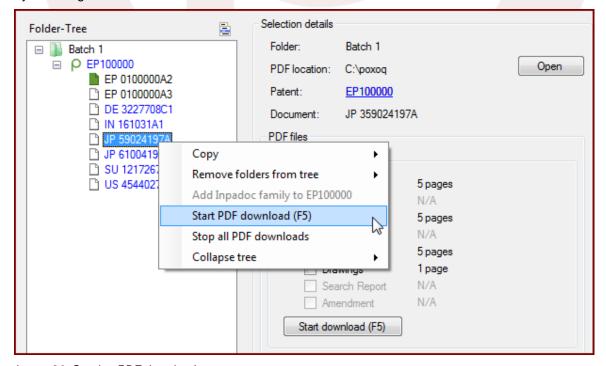

Image 20: Starting PDF download.

6. Batch options

The patent documents are downloaded in batches. Each batch is represented by a folder (node) in the tree view.
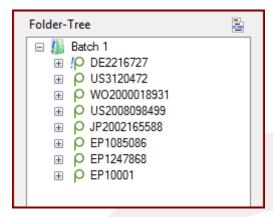

Image 21: The documents are downloaded in batches.

Add documents to…

In this panel one can define the download location of the documents.

Click on "new tree folder" if creating a new batch, and therefore a new tree folder in the tree structure. Type a name for the tree folder in the text field. The default for the first download is "Batch 1". When adding a new folder, the existing folders in the tree will be automatically collapsed.

Image 22: Creating a new tree folder.

Click on "existing tree folder" when adding the downloaded documents to an existing folder. Click on the drop down arrow to choose from the already existing folders. With this option, the new documents are saved in the same directory as the other documents of the tree folder.
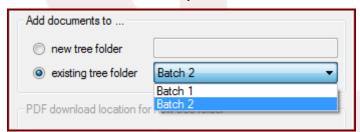

Image 23: Adding documents to an existing folder.

PDF download location for new tree folders

Click "Browse" to choose the location where the downloaded documents are to be saved. Open the directory by clicking "Open". When starting the program for the first time, the desktop is automatically proposed as a basic download path. The location path for already existing folders cannot be changed.

Next to the location, the user can also choose whether to create:

- a sub-directory for the actual batch at the chosen location. The created sub-directory will have the name of the tree folder.
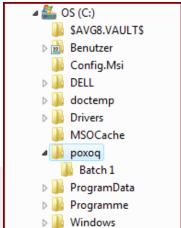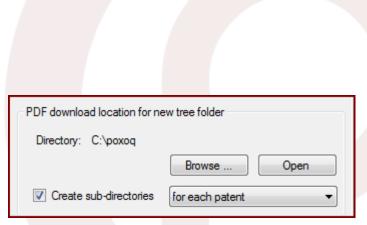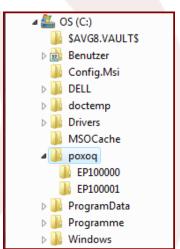

Image 24: Creating a sub-directory for the actual batch.

- a sub-directory for each patent document at the chosen location. The sub-directory will have the name of the patent document in this case.

Image 25: Creating a sub-directory for the each patent.

- a sub-directory for the actual batch containing sub-directories for each patent document.
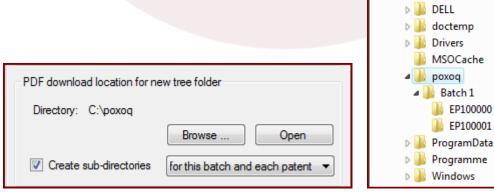

Image 26: Creating a sub-directory for every batch and its patents.

7. Document file name

The standard name for the downloaded documents will be composed of country code, patent number and kind code.

If only parts of the document are downloaded, this will be indicated with combinations of two letter codes in the PDF file name:

ab = abstract
bi = bibliographic data
de = description
cl = claims
dr = drawings
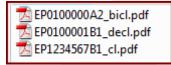se = search report
am = amendments

Image 27: Downloading documents parts.

In case of restricted download due to the use of evaluation credentials, the extension "_incomplete" will be added to the file name (see below section Evaluation credentials, chapter EPO/ OPS authentication).

8. Save settings

The default settings can be changed anytime to one's preferences. These can then be saved by clicking on „Save settings as default". One can return at any time to the previously saved preferences by choosing „Reset to saved settings".

Image 28: Saving settings.

9. EPO/OPS authentication

Overview

The EPO has introduced, starting November 2013, an authentication procedure for accessing OPS data based on the [Fair use charter](#). Registered OPS users are granted free access to volumes of data up to currently 4 GB per week. Registered OPS users willing to pay for more substantial volume of data can apply for access to higher volume of data. Non-registered access is no longer allowed. Upon submission of registration details and approval of the registration request by the EPO, the EPO credentials ('Consumer Key' and 'Consumer Secret Key') will be generated. These credentials can be used by poxoq for patents.

Instructions

1) Submit your EPO registration at https://developers.epo.org/user/register

2) Wait for the EPO confirmation email

3) Log in at https://developers.epo.org/user/login

4) Click on 'MyApps', then on 'Add a new app', give it a name and click on 'Create App'

5) Once the app created click on its name; your credentials ('Consumer Key' and 'Consumer Secret Key') will be displayed

6) Start poxoq for patents, click on the menu 'Extras - EPO/OPS Authentication' and enter these keys

Image 29: EPO/OPS authentication keys / Credentials.

Please note that the EPO/OPS credentials can also be pre-set by your administrator (see below Administrator settings).

Evaluation credentials

As long as no credentials (personal or provided by your administrator) are set, poxoq for patents functions with its own credentials, making e.g. possible to evaluate the software without having to apply for credentials at the EPO. These evaluation credentials, however, only allow a limited download of 10 pages per PDF document. The documents downloaded then carry the extension „_incomplete" in the file name.
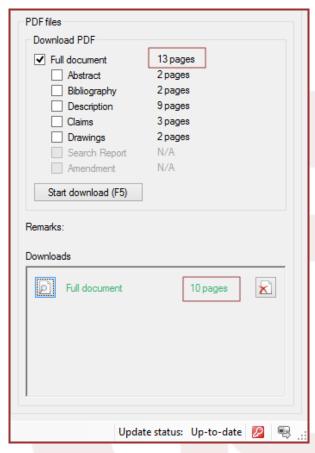

Image 30: PDF download limited to 10 pages per document with evaluation credentials.
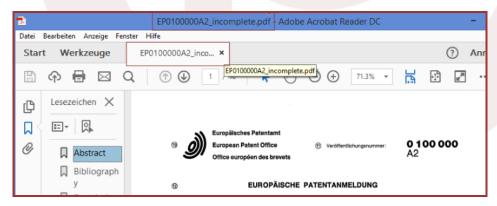

Image 31: "_incomplete" extension for the PDF document.

10. Status bar messages

The key icon in the status bar at the bottom right corner shows the access status to OPS and the credentials in use.
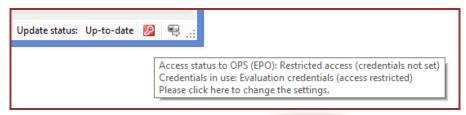

Image 32: Red key icon: restricted access (credentials not set or not valid).

Image 33: Green key icon: unrestricted access (credentials ok).

The traffic icon shows the status of the download activity.

Image 34: Grey traffic icon: no download activity.

Image 35: Green traffic icon: download at regular speed.

Image 36: Red traffic icon: download stopped (maximum volume reached).

Moreover, important messages are shown, if necessary, in the left corner of the status bar. Some of them lead to additional information if clicked.

Image 37: Examples of message displayed in the status bar.

11. Installation

System requirements

- Windows XP, Windows Vista, Windows 7, Windows 8, Windows 10
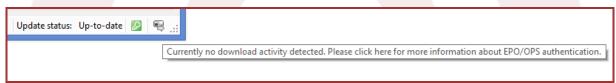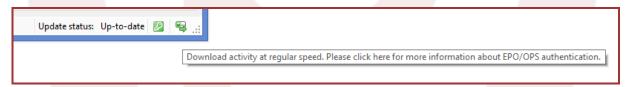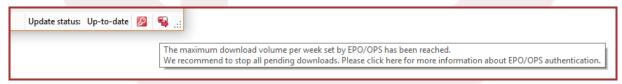
- .NET Framework 4.5 or higher

Installation

The installation can be initiated by opening/starting the poxoq for patents set up file (exe file), and then by following the instructions.

Please note that .NET Framework 4.5 (or higher) must be installed on your computer, otherwise a warning will be shown when you start the program. In this case, please install the .NET Framework 4.5 (or higher) before starting poxoq for patents again. The Microsoft .NET Framework 4.5 can e.g. be acquired and installed by using the 'Windows Update' function.

Silent installation

By using the parameter '-s' when starting the set up, the installation will be executed in silent mode. In this case no messages or questions will pop up. Example:

pfp_setup_2.exe -s

12. Internet connection

poxoq for patents requires an internet connection. If poxoq for patents does not connect to the internet or retrieve any data, then please make sure that your firewall allows poxoq for patents to connect to the internet.

Proxy server information: poxoq for patents automatically applies the proxy server information set up in 'Internet Explorer'.

13. Updates

poxoq for patents automatically checks whether or not updates are available. The results are shown on the status bar at the bottom right corner:

Image 38: Update status: Up-to-date.

poxoq for patents automatically downloads and installs available updates. Please note that the update functions might be disabled by your administrator (see below Administrator settings).

14. Licensing

Evaluation vs. standard license

poxoq for patents is installed with an "evaluation license", giving access to all features and functions, limiting, however, the download to 10 pages per PDF document. For unlimited download, you will need a "standard license". You will need a standard license per user and device.

Order a license

The easiest way to order a license is directly from poxoq for patents under "Extras / Product license". Alternatively, you can also order a licence via the ordering page on our website; here you can choose between ordering a license to an existing product key and ordering a new product key.

To see your product key and the license type or to change the product key click on "Extras / Product license".
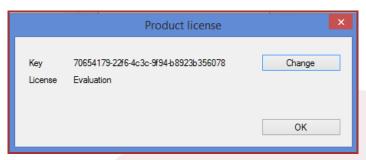

Image 39: Product key and license type.

Image 40: Change product key.

You can order more than one license for the same product key, specifying on the order form the number of users in the "quantity" field. This possibility is supposed to facilitate the ordering and administrating procedure (product keys can also be set by an administrator, see below section Administrator settings), but still means that a license fee has to be paid per user and device. Here as well the easiest way is directly from poxoq for patents under 'Extras / Product license'. Alternatively, you can also order additional licenses via the ordering page on our website. The additional license fees will be calculated per user pro rata to the end of the licensing period.

15. Administrator settings

Overview

By saving an administrator settings file in the program data folder, administrators can disable the update functions or pre-set the EPO/OPS authentication settings or the license (product) key.

Depending on the operating system the program data folder is located or has to be created at:

- Windows XP: "C:\Documents and Settings\All Users\Application Data\poxoq\poxoq for patents"

- Other Windows versions: "C:\ProgramData\poxoq\poxoq for patents"

The settings file has to be named "settings.xml" and saved in "ANSI" or "UTF-8" format. The structure of this file must be as follows. It may contain one or more of the tags <BlockUpdating>, <EPOConsumerKey>, <EPOConsumerSecretKey>, <LicenseKey>. Example when using all of the tags:

<?xml version="1.0" encoding="utf-8"?>

<structAdminAppSettings xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">

<BlockUpdating>true</BlockUpdating>

<EPOConsumerKey> jmhG1mUf52sOUJzYyRzPmIxB55GAmALt </EPOConsumerKey>

<EPOConsumerSecretKey> Pad9Amp8Aqk7xWju</EPOConsumerSecretKey>

<LicenseKey>12345678-354e-4bf2-abcd-546266585333</LicenseKey>

</structAdminAppSettings>

Disable update functions

If the administrator settings file contains the tag <BlockUpdating>TRUE</BlockUpdating> then the update download and install functions within the application are disabled. poxoq for patents will continue checking for available updates but will not download nor install them.

Pre-set EPO/OPS authentication

If the administrator settings file contains the tag <EPOConsumerKey>…</EPOConsumerKey> as well as the tag <EPOConsumerSecretKey>…</EPOConsumerSecretKey> then these keys (please replace '…' by the keys you received from EPO) will be used by poxoq for patents. Any existing user settings related to EPO/OPS authentication will be ignored and cannot be modified by the user anymore.

Pre-set product key

If the administrator settings file contains the tag *<LicenseKey>…</LicenseKey>* then this product key (please replace '…' by the real product key) will be used by poxoq for patents. Any existing user settings related to product key will be ignored and cannot be modified by the user anymore.

16. Contact

For further information, problems or suggestions please contact poxoq at
https://poxoq.com/contact.aspx.

Appendix A

Patent number format for some important publication numbers:

EP publications

EPNNNNNNN (e.g. EP0023859)

WO publications

Applications up to 2001: WOYYNNNNN (e.g. WO0106723)
Applications 2002 from WO0200001 up to WO0251230: WOYYNNNNN (e.g. WO0244385)
Applications 2002 from WO02051231: WOYYNNNNNN (e.g. WO02054873)
Applications 2003: WOYYNNNNNN (e.g. WO03042278)
Applications 2004 to present: WO20YYNNNNNN (e.g. WO2009025226)

US publications

Applications up to 2000: USYYNNNNNN (e.g. WO0016812)
Applications 2001 to present: US20YYNNNNNN (e.g. US2001006158)

JP publications

Applications up to 1999: JPEENNNNNN (e.g. JP06011796)
Applications 2000 to present: JP20YYNNNNNN (e.g. JP2001057865)

N.B. For certain countries the kind code is part of the patent number (e.g. ES1005422U) and has to be added in order to retrieve the correct document. These countries are: Austria (AT), Chile (CL), China (CN), Germany (DE), Denmark (DK), Spain (ES), Finland (FI), Japan (JP), Korea (KR), The Netherlands (NL), Norway (NO), Poland (PL), Romania (RO), Sweden (SE), Turkey (TR), Taiwan (TW), and Serbia and Montenegro (YU).

N   Compulsory digit
YY   Year (last two digits)
EE   Emperor year