Inprotech Quick Reference Card

Getting Started

Inprotech is Venable's web-based Docketing application for managing IP Cases.

Inprotech opens in a browser window where you can view or search for cases.

Screen Tabs

Across the top of the screen are two tabs providing quick access to upcoming Docket Deadlines and My Details.

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• Cases Names Other V	Search 🗌 List View	Case Search Builder

Docket Deadlines displays due dates using the built in searches. You can also use the **Case Search Builder**.

🕸 What's Due (0) - For 1 Month 👻					
	For 1 Day				
	For 1 Week				
	For 2 Weeks				
no data	For 1 Month				
	For 3 Months				
	For 1 Year				

 My Detail displays login information and allows for password changes.

Searching

The Search Bar located at the top of each page allows you to run Quick Searches, Saved Searches or more extensive searches using the **Case Search Builder**. You can search for information by Case Number or Name. Search results can be exported into Microsoft Excel, Word and as a PDF.

Search List View Case Search Builder Saved Searches -

• Cases • Names • Other •

Actions Sidebar

There are no Actions available at this time.

Searching

Quick Search

Allows for quick searching by typing in the Case reference number, Official number or Name.

Note: Quick searches look across multiple fields, so multiple hits are more likely using Quick Search.

Search List View Case_Search Builder Saved Search

Quick Search by Case or Name

Cases O Names O Other

- 1. Select the Case or Name radio button.
- 2. Enter a Case Reference number or Official number or Case Name in the **Search** field.



- 3. Click **Search** or press the **Enter** key.
- A full or partial reference can be used in the Quick Search field.
- The % is used as a wild card to represent one or more characters when entering search criteria in a Name Search.

The results are returned in a separate Search Results Window.

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- 4. Click on a Case to open and view or modify.
- Click the in the upper right to close the Search Window to return to the Case list.

Saved Searches

Searches that you have saved and shared searches are accessible under Saved Searches.

- 1. Click on **Saved Searches** to access the Saved or Predefined Searches menu.
- 2. Hover and Click on a Search from the menu to run it.

The results open in a separate Search Results Window.

Case Search Builder

The Case Search Builder allows you to search on multiple criteria.

To create a more advanced search:

1. Click the Case Search Builder button.

🔌 Case Sear	ch Builder
🖉 Clear	
Search Criteria	DisplaySoft Columns
Search Criteria	
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Standard Adv	anced
References	

There are two search tabs:

- Standard Tab uses the search operator equal to (=).
- Advanced Tab provides a list of operators to select from and additional fields, such as Events.
- 2. Fill in the search fields on the **Standard** Tab.
 - Country- Enter the WIPO code and press TAB or click the lookup button to select.
 - Property type the name or use the lookup button. For Patent or Trademark types enter a space and then the first letter.

- To delete an entry select it and press the Delete Key.
- 3. Click the **Run Search** button on the upper right.

The Search Results window appears.

4. Click on a case to open and view.

If you click on **Standard** Tab the after entering search criteria on the **Advanced** Tab you will receive the following message.



Note: Clicking on **Switch to Standard** clears the Advanced search criteria.

Display/Sort Columns

To add additional columns or change the sort order for the Search Results view.

1. Click on the **Display/Sort** button.



- 2. Uncheck Use default presentation.
- 3. Drag fields from the Available list to the Display Columns list.



- 4. Drag a field to the Sort Columns to change the Sort field.
- 5. Click the radio button 👔 👭 to change the sort order.

Note: If you want to make this your default presentation for future searches click Make this my default presentation.

6. Click Run Search.

The Search Results window appears.

7. Click the **Print** button to print the results.

- 8. Click the Export button and select a format type.
 - Fresh
 Image: Details
 Print
 Image: Export
 Image: Print

 Image: Export As Microsoft Excel (*.xls)

 Image: Export As Microsoft Word (*.doc)
 - Export As Portable Document Format (*.pdf)

Export As XML (*.xml)

The data will be exported and you will be prompted to open or save the file.

To save a search as a personal search:

- 1. Click the + next to Search Details 🛨 Search Details
- 2. Enter a Search Name.
- 3. Click the **Save** button.

Using Saved Search Criteria in the Case Search Builder

To build a new search from a Saved Search by:

- 1. Click on the Case Search Builder.
- 2. Click on Saved Searches.
- 3. Select the Saved Search.
- 4. Modify the fields using new criteria.
- 5. Click Run Search.