

International Intellectual Property Solutions Training



Sacramento, California (USA)

PatentCafe® Certification Training Programs for IP Professionals
Advanced Classroom Study in Patent Search and Portfolio Management Solutions

PatentCafe®

IP SOLUTIONS CERTIFICATION

Certification Programs: ■ ProSearch™ Certification ■ Portfolio-Xpert™ Certification ■ 37CFR AESD Report Certification

PROGRAMS

PatentCafe offers regularly scheduled, open-enrollment courses in several focused subject areas. Courses are held in our advanced training center in Sacramento, California.

The courses presented provide certification in advanced usage of PatentCafe's patent search and analytics tools, and are designed with the patent and IP professional in mind.

PatentCafe's state-of-the-art lecture and computer lab provides students intensive immersion in the next-generation patent research and portfolio management software tools in a low instructor-to-student ratio.

The courses focus not only on **HOW** to use the tools, but **WHY** to use the right tool – and technique - for the right search.

At the conclusion of each course, the student will understand how to construct effective search queries, when to use different techniques for different outcomes, and how to determine that the best results are indeed achieved for the project at hand.

To get the most out of each course, be sure to bring some real-world projects you are working on, in order to take advantage of one-on-one time with the instructor.

In addition, students learn how PatentCafe's linguistic and semantic indexing manages millions of patents to return a clear, focused results set with each search.

After your training is completed, you will have the opportunity to enjoy the attractions and activities of Northern California destinations. Extend your stay over the weekend to enjoy Napa wine tours, Sierra foothills historic gold country, Reno / Lake Tahoe ski resorts, San Francisco, and the California Coast Redwood groves.

Certification Programs are offered as stand-alone classes, or in conjunction with your organization's subscription to PatentCafe patent search and IP management software solutions.

Who Should Attend

The depth of content will be appreciated by individuals in the following roles:

- Intellectual Property Consultants
- Corporate Intellectual Property & Portfolio Managers
- In-house Patent Attorneys
- Professional Patent Researchers
- Outside Patent Counsel

Search Techniques

Types of research include:

- Freedom to Operate (or "Clearance" search)
- Patentability Search
- Enforcement & Licensing Search
- Portfolio Analysis – including qualitative scoring of portfolio patents
- Invalidity Search
- Infringement Search
- Obviousness Search
- Competitive Analysis

For more information regarding PatentCafe's Certification Programs, contact your regional sales representative or:

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PROSEARCH™

CERTIFICATION PROGRAM

Course: ProSearch™ Certification 2008 Curriculum

Get the most out of your ProSearch software subscription. PatentCafe's ProSearch™ software solutions are critical to the knowledgebase of your IP and competitive analysis groups. Maximize your corporate brain-trust by attending this intensive two-day hands-on training and certification program.

Our experienced instructors have a strong knowledge of the leading-edge software that PatentCafe's ProSearch™ solutions are based on, plus awareness of the strategic importance of advanced information to your company's competitive market position

During this two-day course, learn about:

- How to search using advanced semantic analysis on existing patents and published applications
- Why queries for different purposes should utilize different semantic data as the query string
- How to view the competitive landscape of the most relevant patents to your technology
- How to quickly navigate, download, and analyze any results list
- How to maximize your productivity by setting preferences, recording search activity, and utilizing other advanced features of PatentCafe's ProSearch™.
- How to use the "Analyze" and "Cluster" function
- How to download PDF's, XML data, or CSV (Excel-compatible) data for more focused analysis
- And much more!

By the end of the course, students will have a core understanding of ProSearch™, and will be able to produce high-quality search results with amazing speed, with a high comfort-level that the end result is a focused and valuable report. They will have a strong foundation of how to craft the best semantic query, and how to interpret the results.

Each lecture is followed by a computer lab section to demonstrate and practice the content. As time permits, the instructor will assist in student practice on real-world projects and questions.

CERTIFICATION

Successful completion of this course will result in PatentCafe's ProSearch™ Certification. All students who complete the course will receive a Certificate of Completion, course transcript, and all training materials for future reference.

PREREQUISITES

- ▶ Previous experience with Boolean search engines is helpful, but not required.
- ▶ Previous experience with patent content and development is very helpful, but not required.
- ▶ Students should read the white papers before attending (sent in advance).

COURSE CONTENT

- Software Functionality: Navigating the features of ProSearch™
- LSA Theory and Practice: How Latent Semantic Analysis is Applied to Worldwide Patent Data
- Comparative Performance of LSA versus Boolean / keyword Engines: How to Determine when Filters are Too Restrictive
- Searching: Using LSA for Patentability, Clearance, Invalidity, and Enforcement
- Searching: Using LSA for Freedom to Operate, Landscape Analysis
- Obviousness Following KSR: Using LSA to Discover "Non-Obvious" Prior Art
- Advantages and Limitations of LSA: When to Use, and When Not to Use, LSA searching
- Patent Alerts: Applying LSA to Competitive and Technology Intelligence
- Graphical Analysis: Using Visualization Tools for Higher Search Efficiency
- Downloading, Exporting, and Personal Search File Management

PORTFOLIO-XPERT™

CERTIFICATION PROGRAM

Course: Portfolio-Xpert™ Certification 2008 Curriculum

In today's competitive markets, a complete profile of your company's or client's IP portfolio, and how it measures up to the competition, is critical to achieve and maintain a position of strength in the marketplace. Attend and complete the Portfolio-Xpert™ Certification Program to gain complete working knowledge of this unique product line.

Portfolio-Xpert™ is a measure above other "work list" products available in the market. With each portfolio, a complete statistical evaluation is available for every patent in the portfolio. With two portfolios, you can easily compare your patent portfolio to the competition's – and gain intimate knowledge of their strategic goals versus your own.

The curriculum includes a complete explanation of all the statistical indices available on the Patent Factor Index Report, as well as a description of how the group of most closely related patents is generated using LSA analysis.

Students will learn how to identify high and low quality patents from a variety of perspectives, and how to apply the analytical conclusions to recommend the pruning, enforcement or patenting strategy of patents contained in a portfolio.

Each lecture is followed by a computer lab section to demonstrate and practice the content. As time permits, the instructor will assist in student practice on real-world projects and questions. Students from companies already subscribed to Portfolio-Xpert™ will utilize their own portfolios during the computer labs. Other students will perform lab work on a representative portfolio containing approximately 4,000 patents within a narrow technology domain.



CERTIFICATION

Successful completion of this course will result in PatentCafe's Portfolio-Xpert™ Certification. All students who complete the course will receive a Certificate of Completion, course transcript, and all training materials for future reference.

PREREQUISITES

- ▶ PatentCafe's ProSearch™ Certification is strongly encouraged, but not required.
- ▶ Expertise using PatentCafe's ProSearch™ required.
- ▶ Students should read the white papers before attending (sent in advance).

COURSE CONTENT

- Software Functionality: Navigating the features of Portfolio-Xpert™
- Statistical Studies Supporting PFI Statistical Qualitative Patent Analysis
- Statistical Patent Value Indicators: Quality Indicators Used to Evaluate Patents
- Applied Qualitative Patent Measurement: Analyzing Portfolio Assets
- Advanced Portfolio Quality Analysis: Combining Indices for Operational Decision Support
- Utilizing Portfolio-Xpert's Grid View to Compare Patent Evaluation Scoring
- How to Spot "Pruning" Opportunities: Identifying Poor Quality Patents
- Revenue Generation: Identifying High-Value Patents for Licensing (and Target Customers for Licensing)
- Strategic Planning: Mapping Portfolios Against Competitors' Patent Assets
- Asset Management: Clustering and Life-Cycle Analysis of Portfolio Assets

AESD SEARCH REPORT GENERATION

CERTIFICATION PROGRAM

Course: Portfolio-Xpert™ Certification 2008 Curriculum

When your company or client requires an Accelerated Examination filing, the new and revolutionary patent prosecution workflow program is the best solution available in the industry. Attend the Accelerated Examination Support Document Certification Program to differentiate your offerings by including AESD Generation Services.

This course is designed for patent professionals responsible for classification, prior art searching, drafting, and prosecution of US Patent Applications.

Students completing the AESD Search Report Certification Program will be able to use the 37CFR AESD Workflow Solution to efficiently generate the reports required for AESD filings.

Modules will focus on the complex requirements of the AESD, and the documents which must accompany applications filed with the AESD Petition to Make Special form. Lab exercises will walk students through creation of their first computer-assisted AESD report, and detailed review of the dozen reports and forms generated as the classification and search activities are recorded.

Students are encouraged to bring a patent application to leverage the one-on-one attention from the course instructor. In this case, the license included as part of the course will be applied to this application.



Patent Professionals who will benefit most from this course include:

- Patent Attorneys
- Registered Patent Agents
- Experienced professional Patent Searchers

CERTIFICATION

Successful completion of this course will result in PatentCafe's 37CFR – AESD Search Certification. All students who complete the course will receive a Certificate of Completion, course transcript, and all training materials for future reference.

PREREQUISITES

PatentCafe's ProSearch™ Certification is strongly encouraged, but not required. Students should read the white papers before attending (sent in advance).

COURSE CONTENT

- Software Functionality: Navigating the Features of the 37CFR Workflow Solution
- USPTO Compliance: How the Software Meets the Requirements of 37 CFR 1.56 and 10.18
- Entering the Patent Application, Means-Plus or Step-Plus statements, and Statement of Utility
- Data Security Provided by the 37CFR Workflow Solution
- LSA Theory and Practice I: How LSA Identifies the Field of Search by US Class and Subclass
- LSA Theory and Practice II: How LSA finds the "most closely related" prior art (37 CFR 1.98)
- LSA Analysis of the Specification: Using LSA to Find Support for the Claims (35 U.S.C. 112)
- How to Add References Found in Other Sources
- Reports and Filing Package: How to Produce the AESD Report for Electronic Filing via EFS-Web

The AESD Search Report Program is not a substitute for retaining a competent patent searcher, patent attorney, or patent agent for the preparation of an Accelerated Examination Search Document for filing with the US Patent and Trademark Office.

The end result of the AESD Search Report Program is a compilation of reports for electronic filing with the US Patent and Trademark Office. The workflow tool provided by PatentCafe's 37CFR product allows for inclusion of documents and reports which may be required for filing in addition to the PatentCafe reports. Inclusion of these reports is at the discretion (and is the responsibility of) the user. The filing agent or user bears responsibility for the completeness and appropriateness of the final filing.

TUITION

Tuition for each 2-day program is \$3,990 per student. A 15% discount will apply to tuition fees when multiple students from the same organization are enrolled in the same program.

Tuition includes:

- Computer workstation for the duration of the class.
- All workbooks and handout materials.
- Lunch, morning and afternoon snacks.
- Completion certificate, materials and transcript.

CLASS SCHEDULE

Classes are designed for maximum student / instructor time by ensuring a low ratio. All courses are prepaid, and are scheduled in advance based on availability. ProSearch™ and Portfolio-Xpert™ courses are scheduled sequentially in the event students want to complete ProSearch™ as a prerequisite for Portfolio-Xpert™.

Tuesday & Wednesday

- ▶ ProSearch™ Program

Thursday & Friday

- ▶ Portfolio-Xpert™ Program
- ▶ 37CFR AESD Program

TRAVEL AND LODGING

Travel and lodging costs are not included in tuition. Please contact your travel agent for travel and accommodation reservations. Call PatentCafe for a listing of preferred hotels.

TRAVEL DIRECTIONS

AIR: Sacramento International Airport (code: SMF). The PatentCafe Institute is 5 mi. from the airport.

FREE SHUTTLE SERVICE: is provided between the airport and Hampton Inn Suites (see below).

DRIVE: PatentCafe Training Institute, as well as several business travel hotels, is located near the intersection of I-80 and I-5. Detailed directions are provided upon receipt of payment for tuition.



OTHER ASSISTANCE

Contact: PatentCafe at: www.PatentCafe.com • Tel: +1 916.239.2500 • education@patentcafe.com

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San Francisco



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California Redwoods



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