

Family overview

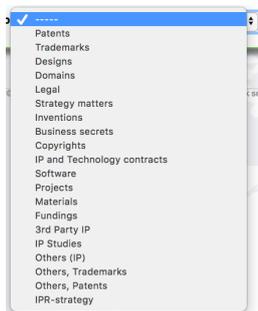
Family overview is customized view on family record in IP management to make relevant information regarding the family easily available in one view. The view is set up according to your organization's needs per each case type.

Settings

Settings for Family overview are made in *Setup / Family overview settings*. Settings are selected per case type and the case type to be modified is selected in dropdown menu.

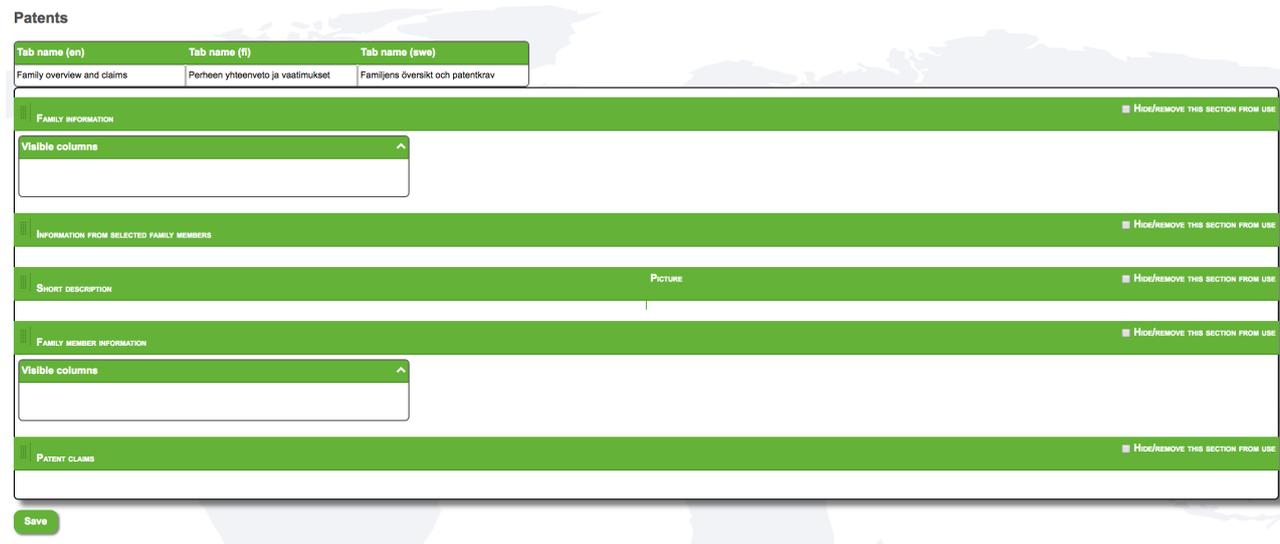


Select case type: -----



- Patents
- Trademarks
- Designs
- Domains
- Legal
- Strategy matters
- Inventions
- Business secrets
- Copyrights
- IP and Technology contracts
- Software
- Projects
- Materials
- Fundings
- 3rd Party IP
- IP Studies
- Others (IP)
- Others, Trademarks
- Others, Patents
- IPR-strategy

Family overview is shown as separate tab in the family record. The tab is visible on the family record only if the settings have been made for that case type. Give the overview tab any name you wish.



Patents

Tab name (en)	Tab name (fi)	Tab name (swe)
Family overview and claims	Perheen yhteenveto ja vaatimukset	Familiens översikt och patentkrav

FAMILY INFORMATION Hide/REMOVE THIS SECTION FROM USE

Visible columns

INFORMATION FROM SELECTED FAMILY MEMBERS Hide/REMOVE THIS SECTION FROM USE

SHORT DESCRIPTION Hide/REMOVE THIS SECTION FROM USE

Picture Hide/REMOVE THIS SECTION FROM USE

FAMILY MEMBER INFORMATION Hide/REMOVE THIS SECTION FROM USE

Visible columns

PATENT CLAIMS Hide/REMOVE THIS SECTION FROM USE

Save

The family overview consists of five sections:

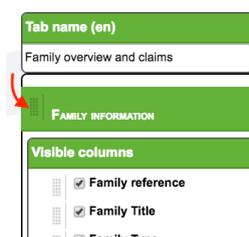
Family information

Information from selected family members

Short description & Picture

Family member information

Patent claims



Tab name (en)

Family overview and claims

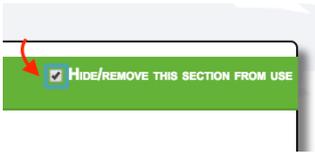
FAMILY INFORMATION

Visible columns

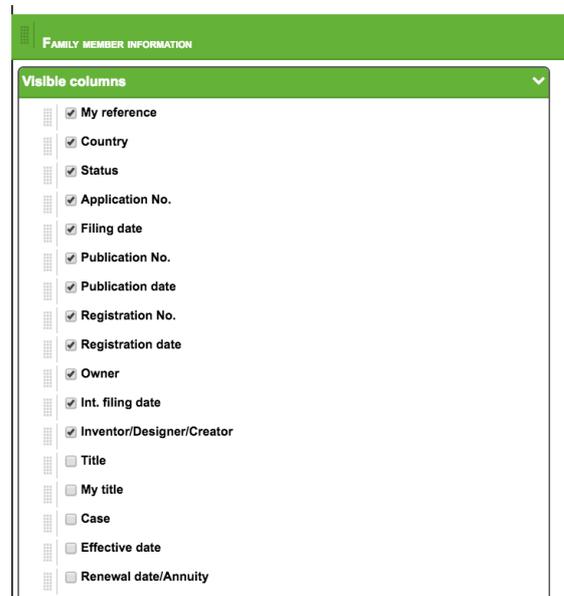
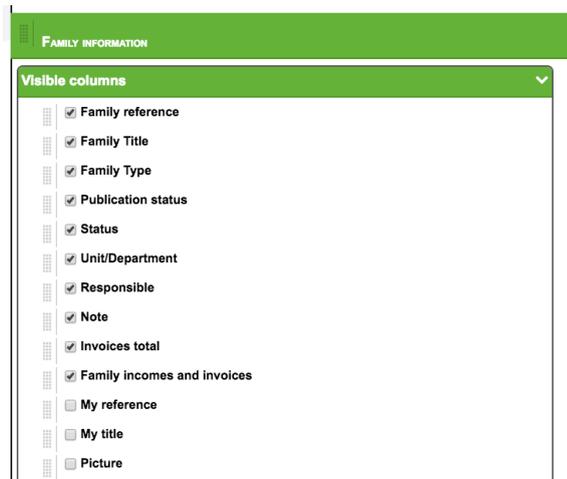
- Family reference
- Family Title
- Family Type

These sections can be arranged in the order you wish. Drag and drop the section by clicking the sign next to the title of the section and keeping the mouse button down while dragging.

If a section is not needed it can be inactivated by selecting Hide/remove the sections from use.



Family information and *Family member information* sections' contents are predefined in the settings. Select and arrange the default and customized fields as you wish.



Remember to save the settings!

Family overview tab on the family record

The family overview is visible as separate tab on family record. The tab is named as set up in the settings by the admin user of your organization.

The family overview consists of five sections:

Family information

Information from selected family members

Short description & Picture

Family member information

Patent claims

BASIC INFO | **SUMMARY AND CLAIMS** | **MAP** | **DOCUMENTS** | **DEADLINES** | **ACTIONS** | **DECISIONS** | **COMMENT LOG** | **COST FOLLOW-UP** | **IP LANDSCAPE** | **FAMILY OVERVIEW AND CLAIMS**

FAMILY INFORMATION

Family reference	Family Title	Family Type	Publication status	Status	Unit/Department	Responsible	Note	Invoices total	Family incomes and invoices
AD00321	New case to create new family in IP Management	Patents	Published	Active		Livingstone, Audrey		100818.50 €	100818.50 €

INFORMATION FROM SELECTED FAMILY MEMBERS

Owner	Inventor/Designer/Creator	Priority data
Greip Diagnostics Oy		2013-05-19: Finland, 987123654

SHORT DESCRIPTION | **PICTURE**

SHORT DESCRIPTION

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed posuere interdum sem. Quisque ligula eros ullamcorper quis, lacinia quis facilisis sed sapien. Mauris varius diam vitae arcu. Sed arcu lectus auctor vitae, consectetur et venenatis eget velit.

Sed augue orci, lacinia eu tincidunt et eleifend nec lacus. Donec ultricies nisi ut felis, suspendisse potenti. Lorem ipsum ligula ut hendrerit mollis, ipsum erat vehicula risus, eu suscipit sem libero nec erat. Aliquam erat volutpat. Sed congue augue vitae neque.

Nulla consectetur porttitor pede. Fusce purus morbi tortor magna condimentum vel, placerat id blandit sit amet tortor.

PICTURE

FAMILY MEMBER INFORMATION

My reference	Country	Status	Application No.	Filing date	Publication No.	Publication date	Registration No.	Registration date	Owner	Int. filing date	Inventor/Designer/Creator
AD00321FI	Finland	Active	987123654	2013-05-19					Greip Diagnostics Oy		
AD00321PCT	PCT	Active		2014-05-19	WO2016116658				Greip Diagnostics Oy	2014-05-19	
AD00321EPO	EPO	Active		2015-05-18					Greip Diagnostics Oy	2014-05-19	
AD00321	Germany	Active	8542625181			2017-02-04	5471695703	2017-01-01	Greip Diagnostics Oy	2017-01-04	

PATENT CLAIMS

Country	Status	Claim Text
Finland	GRANTED	2017-06-29 1. An arrangement for data distribution in an intellectual property, IP, management system, the arrangement comprising: Mauris sed libero. Suspendisse facilisis nulla in lacinia laoreet, lorem velit accumsan veli vel mattis libero nisi et sem. Proin interdum maecenas massa turpis sagittis in, interdum non lobortis vitae massa. Quisque purus lectus, posuere eget imperdiet nec sodales id arcu. Vestibulum elit pede dictum eu, viverra non tincidunt eu ligula.
Germany	PCT, PENDING	2016-10-03 1. An arrangement for data distribution in an intellectual property, IP, management system, the arrangement comprising: Nam molestie nec tortor. Donec placerat leo sit amet velit. Vestibulum id justo ut vitae massa. Proin in dolor mauris consequat aliquam. Donec ipsum, vestibulum ullamcorper venenatis augue. Aliquam tempus nisi in auctor vulputate, erat felis pellentesque augue nec, pellentesque lectus justo nec erat. Aliquam et nisi. Quisque sit amet dolor in justo pretium condimentum.

Some of these sections may not be in use if inactivated in the settings. And also the order of the sections may vary from case type to another as the settings are made separately for each case type.

The visible fields are predefined in the settings for *Family information* and *Family member information* sections. Other sections are modified for each family on the family record.

Editing the family overview

Information from selected family members is selected per field. Choose the family member from which the information is to be shown for each field that is to be visible in this section. Drag and drop the fields in the necessary order.

The screenshot shows a configuration panel titled 'Visible columns' with a dropdown arrow. It contains several fields, each with a list icon on the left and a dropdown menu on the right:

- Owner**: Finland
- Inventor/Designer/Creator**: Finland
- Priority data**: PCT
- My reference**: (empty)
- Title**: (empty)
- My title**: (empty)

Write *Short description* of the family and edit the text using the editor above the text field.

Select the *Picture* either from the picture fields of this family OR select *Add new picture* and choose relevant file via clicking the grey button. Current picture is shown here.

The screenshot shows two side-by-side sections:

- SHORT DESCRIPTION**: A rich text editor with a toolbar and the following text:
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed posuere interdum sem. Quisque ligula eros ullamcorper quis, lacinia quis facilisis sed sapien. Mauris varius diam vitae arcu. Sed arcu lectus auctor vitae, consectetur et venenatis eget velit.
Sed augue orci, lacinia eu tincidunt et eleifend nec lacus. Donec ultricies nisi ut felis, suspendisse potenti. Lorem ipsum ligula ut hendrerit mollis, ipsum erat vehicula risus, eu suscipit sem libero nec erat. Aliquam erat volutpat. Sed congue augue vitae neque.
Nulla consectetur porttitor pede. Fusce purus morbi tortor magna condimentum vel, placerat id blandit sit amet tortor.
- PICTURE**: A section for image management. It shows:
 - Current picture**: A large logo with the word 'greip' in a stylized font, where the 'e' is green.
 - Custom family picture**: A smaller version of the same logo.
 - Add new picture:** A section with a grey button labeled 'Valitse tiedosto' and a link 'Ei valittua tiedostoa'.

Patent claims

Select the family members from which the latest version of the main claim of the application is shown. Add new countries by clicking the + icon.

The screenshot shows a configuration panel titled 'PATENT CLAIMS' with a dropdown arrow. It contains three dropdown menus for selecting family members:

- Finland
- PCT
- Germany

A green plus icon (+) is located at the bottom left of the panel.

The main claim is maintained on the case record on Claims history -tab. Only the latest version is shown on the family overview.