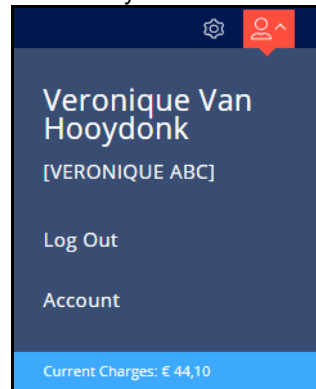# 5. Account – Inbox – Preferences

5.1. Account

It is important to keep track of the cost of your online searches. Each month, CompuMark sends you a detailed invoice where you can check this information for each user. Often, however, this information needs to be shared internally or sent to clients on short notice. SAEGIS™ allows you to check the incurred charges in the account whenever you need this information.

You can access the account by clicking on this icon in the grey banner at the top right of the screen. A dropdown will open where you can access the account information.

Remark:
You can open the account at any given time without interrupting your current search.

Using the Account

The SAEGIS account will open in a new window. At the top, you can see your client number, company information and a running total of your costs for the current day **(1)**. The table at the bottom of the screen shows you a detailed breakdown of today's search costs **(2)**.

If you want to see the cost of all searches for the current month instead of today's charges, you can change the invoice detail level by either selecting **All Sorted by Date** or **All Sorted by Reference**, depending on your preference, from the **Show Charges** options **(3)**.

The account not only allows you to check your costs for the current month, but also offers the possibility of checking old invoices online. If you want to check an invoice for a previous

---

month, you can choose **Past Invoices** instead of **Current Activity (4)** at the top of the screen.

You can open the account in Word, PDF or Excel or print the invoice by clicking on the appropriate buttons at the top or bottom of the screen (see below).

The account offers the following information about your conducted searches:
- the reference of the conducted searches
- the date and time on which the searches were performed (time is GMT)
- a description of the search you have executed and the viewed hits
- a cost breakdown for each separate search, as shown in the screenshot above
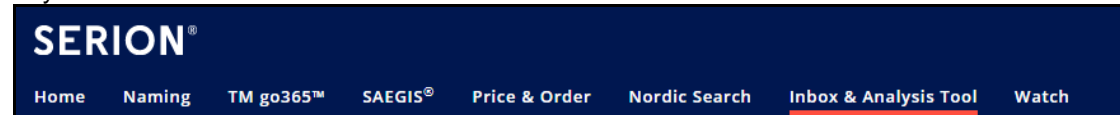
The total cost for all of today's searches is listed separately at the bottom for each user.

Remark:
It is possible to get access to the SAEGIS usage information for all the users of your company on demand. This can be interesting for managers or for colleagues working in the accountancy department. Please contact the SERION Support Team to activate this feature.

5.2 Inbox

The inbox is an electronic archiving system for all your saved search results. Searches that are ordered from CompuMark can also be delivered here. In the inbox, you have access to all your saved queries. You can create new reports from your stored hit lists, export your searches to other applications, organize them into folders or just consult your saved results at any time.

You can reach the inbox by clicking on the **Inbox** tab at the top of the screen.

Remark:
Please note that documents saved to your Inbox are not saved on your computer, but are stored on our servers. Because of this, you can access your saved results from any computer with an internet connection. Moreover, you do not lose your searches when your computer should crash.

Using the Inbox

All of your recently saved searches are listed in a table.

Saved searches are displayed in chronological order by default, with the most recent searches listed on top. You can sort your documents by title, product type, reference, order number, order date and expiry date by clicking on the appropriate columns, as shown in the screenshot above.

Clicking on a column once more reverses the sorting order. The column that is currently used for sorting is indicated by a downward- or upward-pointing triangle next to the title **(1)**.

2

To view a saved search, simply click on the document title to open it **(2)**. The search can then be exported to a default or personalised template via the Quick Export-button.

☐	▶	Custom Search Analysis: hipro 125	Completed	Custom Search Analysis	hipro 125	14-JUL-2015 09:50:28	325 day(s)

Be aware that, because of disk space issues, searches saved to the inbox will not be kept available indefinitely. After twelve months, stored searches will be deleted. Make sure you archive your important documents before this deadline. You can consult the date in the **Delivery Expires** column to keep track of this (see screenshot below).

☐	▶	Custom Search Analysis: truncations 333	Completed	Custom Search Analysis	truncations 333	03-SEP-2014 08:57:18	10 day(s)

Shortly before expiry, the expiry date of your search will be displayed in red as a warning.

You can filter the results of the Inbox on title, product, reference, order number, order and expiry date. To do this, simply click on the **Filter (3)** boxes above each column. Depending on the column, you can then either fill out the words on which the columns should be filtered or (un)select display options from a drop-down menu.

3

		▼ Filter...	▼ Filter...	▼ [Custom Search	▼ Filter...	▼ Filter...	▼ Filter...	▼ Filter...
☐		Title	Results	Doc	Product	Your Ref.	Order Nr ▲	Order Date	Delivery expires
☐	▶	Custom Search Analysis: etm tm 21258	Completed		Custom Search Analysis	etm tm 21258		13-AUG-2015 09:40:53	355 day(s)

Searches can be organised into folders for easier retrieval. You can create new folders or rename or delete existing folders by using the buttons on the left side of the screen **(4)**.

4

Folders ◀	Inbox				
📁➕ 📁Ⓐ 📁❌		▼ Filter...	▼ Filter...	▼ [Custom Search	
📁 Public(Company Abc) (1)	☐	Title	Results	Doc	Product
📁 Inbox (6) (26)					
📁 client 1					
📁 cliente X	☐ ▶	Custom Search Analysis: etm tm 21258	Completed		Custom Search Analysis
📁 Extra searches (2)					

Several other functions are available at the top of the Inbox:

Actions	Import	Export	Filter and Sort	Refresh

■ Through the **Actions** menu, you can
  o mark documents as read or unread
  o delete searches from the Inbox
  o change the title and/or reference of a search.
  o move searches into a folder by either dragging and dropping them into the folder, or by ticking the box next to the search and then clicking the **Move to Folder** button under the **Actions** Menu. Clicking the button will bring up the new screen, where you can select the desired folder from a drop-down menu.
  o Share searches with other SAEGIS users within your company/law firm with the **Share** button under the **Actions** Menu. You will be presented with a new screen, where the desired recipient can be selected from a drop-down menu..

■ External documents can be imported into the Inbox from your network or computer with the **Import** button. You will be presented with a new screen where you can locate the desired file on your computer and enter a reference and title.

- Through the **Export** Menu, the Inbox list can be
  - exported to Excel with the **Open in Excel** button. All your active filters and sort orders will be kept.
  - printed by clicking the **Print Table (5)** button.

- Through the **Filter and Sort** Menu, you can remove all filters and/or restore the default sorting order by clicking the **Clear Filter** or **Default Sort** buttons **(6)** above the search overview.

- Update the Inbox to check for newly-delivered searches with the **Refresh (7)** button.
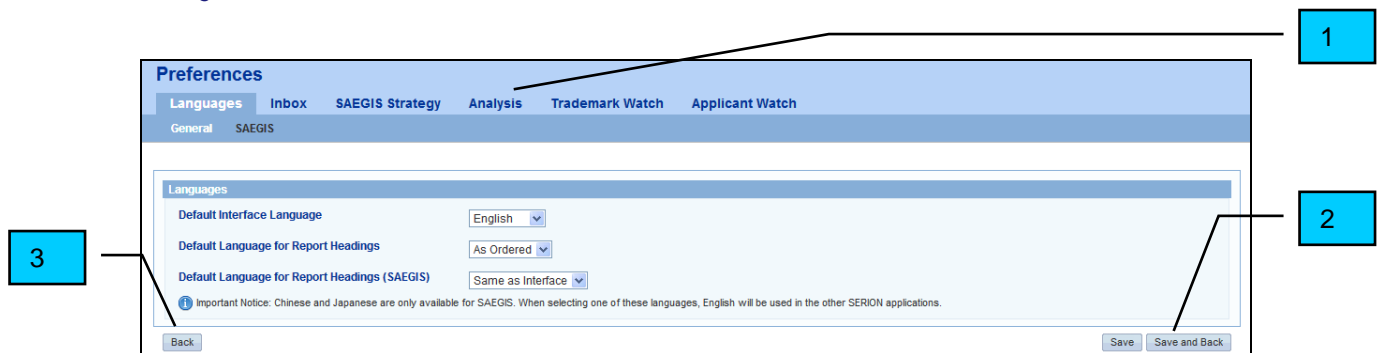
5.3. Accessing and Modifying Your Preferences

Apart from offering a set of integrated and easy-to-use screening tools, SERION can also be fully tailored to your needs. In the SERION Preferences, you can define the general behaviour and appearance of the user interface and set your preferences for the different trademark tools and for the inbox.

You can reach the preferences by clicking on the -icon in the blue banner at the top of the screen.

Remark:

Depending on where you are in SAEGIS, clicking on the -icon will open a different preferences window. For example, if you are using SAEGIS Custom Search, the preferences screen for SAEGIS Custom Search will be displayed. If you are in SAEGIS Identical Screening Search, the preferences screen for SAEGIS Identical Screening Search will open. This allows you to quickly change your settings.

In the blue banner on top of the screen, you can find tabs for the preferences for each SERION solution. From left to right these are: **Languages**, **Inbox, SAEGIS Strategy, Analysis, Trademark Watch** and **Applicant Watch (1)**.

Clicking one of these links brings you to the appropriate preference screen. We will explain the preferences of each of these parts in detail over the following pages. The preferences for Trademark Watch and Applicant Watch will not be discussed in this manual.

After changing the preferences, click on **Save** or click on **Save & Back (2)** to return to SAEGIS.

If you want to return to SAEGIS without making any changes, you can click on the **Back (3)** button. This will close the preferences window and take you back to your SAEGIS screen.

5.3.1 Languages

Language preferences allow you to choose the interface and trademark information language in all SERION solutions. In SAEGIS you can also set the languages for the list of goods of your trademarks.

5.3.1.1. General Language Options

In this screen, you can:

■ choose the language of the interface **(1)**. You can choose between English, Dutch, German, French, Italian, Spanish, Chinese or Japanese.

■ choose the language of the report headings in the SERION Analysis Tool **(2)**. You can choose from the same languages as for the interface. Additionally, you can set the language to the one that was specified when the search was ordered with CompuMark

■ choose the language of the report headings and trademark information **(3)**. The same languages as for the interface are available. Additionally, you can use the same language for the report headings as for the interface.

5.3.1.2. SAEGIS language options

In this screen, you can:

- ■ choose which languages appear in the list of goods of published European Union Trademarks. Choose between all available languages or the language(s) of your choice **(4)**.

- ■ choose if the list of goods appears in the original language, in an English computer translation or in both languages **(5)** for all other trademarks.

- ■ choose whether the Chinese characters for trademark names, owner names, filing correspondents and lists of goods and services for Chinese trademarks are displayed **(6)**.

Remark:
Please note that this computer translation is offered to you as a service and should not be trusted upon as an official description of the original list of goods.

5.3.2 SERION Inbox Options

5.3.2.1 General Inbox Options

In this screen, you can:

- Determine whether the SERION Inbox shows all of your archived searches, only unread documents or documents from a specific date range **(1)**.

- Choose whether the SERION Inbox shows ordered searches, SAEGIS results and/or imported external documents **(2)**.

- Choose whether you receive an e-mail notification when a result is delivered to your SERION Inbox **(3)**.

- Choose whether the "All" Inbox (for searches that were ordered without specifying an attention) should be shown in your Inbox **(4)**.

- Determine whether SERION contacts of yours that normally do not receive searches directly from CompuMark should appear in your contact list **(5)**.

- Determine whether EUTM and IR trademarks are assigned along with national trademarks when using the SERION Collaboration Tool **(6)**.

- Choose whether you receive an e-mail notification when a search has been assigned to you or has been cancelled when using the SERION Collaboration Tool **(7)**.

5.3.2.2 Manage Contacts

In this screen you can modify the details of your existing SERION contacts, add new contacts and remove existing ones. Contacts that are linked to an active SERION user account cannot be deleted.

When you use the SERION collaboration tool to distribute large searches amongst your contacts, you can also use the **Default Jurisdictions** field to indicate which jurisdictions your contacts usually work on.

5.3.3. SAEGIS Strategy Options

5.3.3.1. General Strategy Options

Here, you can:
- make the **Reference** field obligatory **(1)**
- set a default reference or define a set of standard classes for all your queries **(2)**
- always show/hide the database selection screen during searches **(3)**
- enable/disable the automatic selection of the industrial names (Finland, Norway, Spain and Sweden) when selecting the respective trademark databases **(4)**
- enable/disable the price warning pop-up window **(5)**

5.3.3.2. Custom Search Strategy Options

Strategy Options

In this screen, you can modify the following options:

1) You can define the **detail level** of your SAEGIS Custom Search queries from the appropriate drop-down list. There are three detail levels:

- **No Query Detail**: displays the hit count of your query, listed by country. Entering a new query removes the results of the previous question.

- **Minimum Query Detail**: displays the total number of hits found over all of the selected databases. Entering a new question does not remove the hit count of the previous question. You can combine questions with AND, OR and NOT operators. This is the standard detail level for SAEGIS Custom Search.

- **Maximum Query Detail**: offers a detailed breakdown of hits for all the sub queries of your question and the total number of hits for your query as such. Again, entering a new question does not remove the hit count of the previous question. You can combine questions and/or sub queries with AND, OR and NOT operators.

2) You can define the number of SAEGIS Custom Search search fields (from four to twelve) displayed during searches.

3) You can modify the default SAEGIS Custom Search search fields and operators by choosing the desired search fields and operator from the appropriate drop-down lists.

Example: If you frequently search on filing correspondent instead of owner name, you can replace **Owner Name** by choosing **Filing Correspondent** from the drop-down list.

Remark:

You will still be able to change the search fields when using SAEGIS Custom Search. Changing search fields in the preferences only decides what search fields are displayed by default when you go to SAEGIS Custom Search.

4) You can choose to display or hide the operator fields next to each search field by selecting or deselecting the appropriate checkbox.

Operator fields can be found to the right of the search fields.

5) You can enter a list of default goods and services to be searched. This can be useful if you frequently search the same goods in SAEGIS.

Remark:
In European databases, the list of goods can only be searched in the original filing language. Moreover, the contents of the list of goods may not be according to your expectations. For example, the owner of the trademark may have filed the goods of a certain trademark as "boots" instead of "shoes". Therefore, we do not recommend searching goods and services in the European databases.

6) Additionally, it is possible to switch on or off the general SAEGIS Custom Search options by selecting or deselecting their designated checkboxes. The following options can be modified:

- **Active Only**: limits your search to active trademarks only, i.e. registered, filed, pending and renewed trademarks.

- **Plurals**: enables or disables searching for English regular (+S, +'S, +ES) and irregular plural forms (e.g. mouse – mice, child – children) to your trademark.

- **Phonetics**: enables or disables searching for phonetics based on the English language. For more information, please consult 3.4.1.3. PTM = Phonetic Trademark.

- **Cross References**: enabling this option retrieves homonyms, plays on words and numeric equivalents to your trademark when searching North American databases.

- **Japanese Phonetics**: enables or disables searching for Japanese phonetic variants to your trademark when searching the Japanese database.

- **Central European Phonetics**: enables or disables searching for Central European phonetic variants to your trademark when searching Central European databases.

7) Finally, by using the drop-down list at the bottom of the screen, you can choose the number of results returned when using the **Browse Index** functionality.

Database Templates

Select your desired registers by ticking the appropriate boxes (see above) and save them as a database template if you frequently search the same registers.

Ticking the "Save This Template as Default" box will make sure these databases will always appear selected in the SAEGIS Custom Search **Main Page** window. You will still be able to change the selected registers.

See the Custom Search Chapter, 3.6.3 for more information on database templates.

Custom Format Options

Although SAEGIS offers a wide choice of formats for displaying the trademarks in your hit list, it is also possible to create your own formats according to your preference. To do this, click on the **Custom Format Options** to access the options screen displayed above.
You can also modify formats you have already created here.

- ■ To create a new format, select the appropriate button and enter a format name **(1)**.

- ■ To edit or delete an existing format, select it from the **Existing Custom Format** list and add/remove fields from your format or click the **Delete Format** button **(2)**.

- ■ From the list of available fields on the left-hand side, choose the first field you want to include in your format and double-click on it to move it to **Custom Formats Fields** on the right, or click the **Add** button **(3)**. Continue until you have added all the desired fields. You can see the cost of each field at the bottom of the page.

- ■ To remove a field, select it from the **Custom Format Fields** and click the **Remove** button or double-click on it to put it back in the **All Available Fields** list on the left of the screen **(4)**. Change the order of the fields with the "↑" and "↓" buttons **(5)**.

- ■ Click on **Save (6)** to store this custom format for later use. When you start a new search, you will be able to choose your own format from the drop-down list in the **View Hits Options** bar. You can also set your own format as the default choice.

5.3.3.3. AutoScreen Options

Database Templates

Select your desired registers by ticking the appropriate boxes and save them as a database template if you frequently search the same registers.
Ticking the "Save This Template as Default" box will make sure these databases will always appear selected in the SAEGIS AutoScreen **Enter Strategy** window. You will still be able to change the selected registers.

See the AutoScreen Chapter, 2.3 for more information on database templates.

5.3.3.4. Identical Screening Search (ISS) Options

In the option screen for SAEGIS Identical Screening Search searches, you can define the standard type of Identical Screening Search offered by the system. You can also choose the standard regions and countries for regional, customized and country Identical Screening Searches. You can get to these preferences by clicking on the **Identical Screening Search** link in the blue title banner of the screen.

Global Settings

By selecting one of the buttons shown above **(1)**, you can choose whether SAEGIS offers a worldwide, regional, customized or country Identical Screening Search as the standard search when opening the SAEGIS Identical Screening Search screen. You can also choose whether the file dates get included in the search reports by default or not by ticking the checkbox next to **Include File Dates (2)**.

Defining Default Search Regions

You can pre-set search regions. Select your desired regions by ticking the appropriate boxes.

These regions will be selected by default for all your future Regional Identical Screening Search searches. You will still be able to change the regions by clicking the **Change Selected Regions** button in the SAEGIS Identical Screening Search **Enter Strategy** screen.

Defining Default Search Countries/Customized Search Regions

| Global | Default RISS Regions | **Default KISS Countries** | Default Customized RISS Countries |

▶ **Default KISS Countries**

[Unselect All]

▼ **A - B**

☐ Afghanistan	☐ Antigua and Barbuda¹	☐ Austria¹²	☐ Belarus¹	☐ Bophuthatswana	☐ Bulgaria¹
☐ Albania¹	☐ Argentina	☐ Azerbaijan¹	☐ Belize	☐ Bosnia-Herzegovina¹	☐ Burundi
☐ Algeria¹	☐ ARIPO	☐ Bahamas	☐ Benelux¹²	☐ Botswana	
☐ Andorra	☐ Armenia¹	☐ Bahrain	☐ Bermuda	☐ Brazil	
☐ Angola	☐ Aruba	☐ Bangladesh	☐ Bhutan¹	☐ British Virgin Islands	
☐ Anguilla	☐ Australia¹	☐ Barbados	☐ Bolivia	☐ Brunei	

▶ **C - D**

▶ **E - F**

▶ **G - H**

▶ **I - J**

▶ **K - L**

▶ **M - N**

▶ **O - P**

▶ **Q - R**

▶ **S - T**

▶ **U - Z**

1. Member of the Madrid Agreement and/or Protocol (International Register - INTE)
2. Member of the European Union (Community Trademarks - CTM)

Please note: Selection of individual countries does not include coverage in CTM (Community Trademarks) or INTE (International Register). For complete coverage of trademarks potentially protected in your selected country/countries, we recommend searching INTE and/or CTM.

Select your default countries by ticking the appropriate boxes from the alphabetical list (see above). To collapse or expand the country list for specific letters of the alphabet, just click the arrow icon next to the letters.

The chosen countries will be selected by default for all your future Customized Regional Identical Screening Search or Country Identical Screening searches. You will, however, still be able to change the countries of your search by clicking the **Change Selected Countries** button in the SAEGIS Identical Screening Search **Enter Strategy** screen.

5.3.4. Analysis Options

Here you can determine several aspects of the Analysis & Reporting tools in both SAEGIS and the Analysis Tool for SERION.

5.3.4.1. General Options

Display Options

In this screen you can:

- Set the system to always select a record for export when you apply a color flag in SAEGIS or the Analysis Tool in SERION **(1)**.

- Ensure a specific owner and/or goods highlight is enable by default when you view your search results **(2)**.

- Determine whether SERION should use a shorter representation of a trademark's full information (only showing the trademark name and logo, owner name, status and filing/registration dates, international classes and goods and services) or the full trademark information when using the record view **(3)**.

- Determine whether SERION should show EUTM and IR trademarks in the national country tabs if the trademarks are protected in the selected country **(4)**.

- Choose whether colour flags applied to European Union Trademarks (EUTM) or International trademarks (IR) in national country tabs are limited to that country only or transferred to all other tabs for the same record **(5)**.

- Choose whether the EUTM records show goods and services in the user interface language as well as in English **(6)**.

- Choose whether the full list of goods and services is opened in the results table itself or in a separate window **(7)**.

- Set the default number of trademarks that is shown on one page **(8)**.

Export Options

Here, you can determine whether SERION should export your search reports as a file, to the SERION Inbox or both ways.

5.3.4.2. Search Options

Here you can set options that *only* apply to the Analysis Tool on SERION for *ordered searches*. You can change the interface, determine how your reports are exported and set up standard flag definitions for your ordered searches.

5.3.4.3. SAEGIS Options

General

In this screen, you can set up SAEGIS to:

- include or exclude file dates in/from your report
- include or exclude the owner index in/from your report
- include or exclude the account information in/from your report
- use a new page for each new trademark in the printed report
- compress exported documents
- only show the country specific information of IR trademarks for the selected countries

Custom Search

In this screen you can:

■ choose whether the **View Hits Options** bar at the end of the **Show Hit Count** screen is expanded by default or not **(1)**

■ define how many hits get displayed by default by choosing the desired number from the drop-down list next to **View Hits (2)**

■ choose a default format for displaying the hit list from the drop-down list **(3)**

■ choose whether SAEGIS shows all the hits from your search or only the results from selected databases **(4)**

■ hide the query number and/or the database name from the SAEGIS hit list **(5)**

■ choose whether the strategy display in the hit list shows all of your queries, no queries at all or only those queries that are linked to the hits you have selected **(6)**

■ choose whether the contents of a combined query (e.g. "Q1 AND Q5") should be displayed or not **(7)**

■ choose whether SAEGIS should offer a direct link to the standard SAEGIS Custom Report from the **Hit Count** window or not **(8)**.

■ choose whether SAEGIS should be using the **Basic View** as a default **(9)**.

■ add a default meaning to the colour flags you apply in the Analysis & Report screen **(10)**.

AutoScreen

In this screen you can:

■ choose the **Display Options** for AutoScreen. You can limit your search to Active Only and put a saved sorting as your default sorting **(1)**

■ add a default meaning to the colour flags you apply in the Analysis & Report screen **(2)**.

Basic View & Report

If you prefer the presentation of your search results of the previous SAEGIS version, you can still use the **Basic View** and **Basic Report** for both SAEGIS Custom Search and SAEGIS AutoScreen. You can configure the presentation of your search results in this screen.

Preferences

Languages   **Inbox**   **SAEGIS Strategy**   **Analysis**

General   Search   SAEGIS

General   Custom Search   AutoScreen   **Basic View and Report**

View Hits Options

General   **Custom Search**   AutoScreen

Show Hitlist in Form View	☐
Hide in Table	☐ Hit Number
	☐ Query Number
	☐ Database Name
View Search Criteria	☐
Goods Highlight	☑

View Report Options

General   **Custom Search**   AutoScreen

Show View Report Options	☐
Default Report Format	Full Text with Image ▾ ⓘ First price refers to all databases, except for the trademark databases of Belarus, China, India, Japan, Russian Federation, South Korea and Ukraine which are charged at the second price.
Choose Hits to Be Included in Hits Overview	Only Selected Hits ▾
Choose Queries to be Included in Search Strategy	Show All Queries ▾
Include Saved Images of External Sources in Report	☑
Clear Hits Selections after Creating Custom Report	☑

Back   Save   Save and Back

Preferences

Languages   **Inbox**   **SAEGIS Strategy**   **Analysis**   **Trademark Watch**   **Applicant Watch**

General   Search   SAEGIS

General   Custom Search   **Basic View and Report**

View Hits Options

General   Custom Search   **AutoScreen**

Default Filter	☐ Limit to Active Only
Limit Hit Options	☐ Limit to Identical Trademarks in Selected Classes
Default Sort Order	Default (by pertinence) ▾
Sort type	◉ Ascending
	○ Descending

View Report Options

General   Custom Search   **AutoScreen**

Show View Report Options	☐
Default Report Format	Full Text with Image ▾
Include Hits Overview	☑
Include Saved Images of External Sources in Report	☑

Back   Save   Save and Back