2. SAEGIS™ AutoScreen

2.1. About SAEGIS AutoScreen

SAEGIS AutoScreen is an automated screening tool, based on our experience in search intelligence and technology. By simply entering a search term, SAEGIS AutoScreen will define a search strategy and locate identical and closely similar trademarks, listed in order of relevance.

In SAEGIS AutoScreen you can

- combine trademarks, industrial names and pharmaceutical names in one search
- use Preferences to set your database selection as a default
- find the most relevant and important trademarks on top of the hit list, review results fast and efficiently with easy-to-use sorting, filtering and exporting tools
- quickly find important trademarks with owner and goods highlighting and add your opinion to search results with colour markers and comments
- export results into customized reports

The following databases are available in SAEGIS AutoScreen:
- Trademark Names
- Industrial Names
- Pharma In-Use

More information on the available databases can be found by clicking the icon on the upper right of the database window.

2.2. Performing a search – Search steps

On the SAEGIS Home page, click on the **AutoScreen** shortcut under the **Products and Tools** heading.

When you are in AutoScreen, navigate through the search process either using the breadcrumb navigation bars provided or by using the"Back" and "Next" buttons at the bottom of each AutoScreen page.
Do not use your browser's back button. If you inadvertently hit the Back button on your browser, click "Refresh" to restore your session.
Before you begin your search, you may want to turn off any pop-up blocking software you use. Some screens within AutoScreen will open in new windows, which are blocked by some pop-up software.

STEP 1 – Enter Strategy

The **Trail (1)** informs you where you are in your search.

You can enter a **Reference (2)**. This reference will appear on all your SAEGIS-invoices, in your account and in the inbox when saving your search. Filling out a reference is not obligatory. Your reference can be anything you like. It could be:
- ✓ A customer's billing code
- ✓ The tradename you are searching for
- ✓ Your name

This reference will make it easier to find the search and reports later on. If you do not enter a reference, the system will automatically enter today's date in the reference field.

Select the **Databases (3)** you want to search by checking the box next to a specific register or group of countries.
AutoScreen allows to search through any SAEGIS trademark and Pharma In-Use databases, either alone or together.

Your selection will appear in the right window.
To deselect a database, either uncheck its box in the left window, or click on its name in the right window.

If you frequently search the same registers, you can save a **Database Template (4)**. Please consult below 2.3 for information on how to create and modify these templates.

Enter the trademark and class(es) you want to search under **Criteria**.
- ✓ Enter your search terms the way you would like to file the trademark. The system will automatically drop punctuation, convert special characters, split up combined words, etc…
- ✓ Enter the classes of good or services that you would like to be searched. To search multiple classes, separate individual classes with a space or a comma. Use a colon (:) or a dash (-) to search a specific range of classes.

Once you have entered your reference, selected your database(s) and typed in your mark and classes, simply hit the **Next** button to review your details and then run the search. If, however, you would like more control, click the **Advanced Search Options**. See Chapter 2.3.

STEP 2 – Confirm Details

The **Confirm Details (1)** screen gives you a summary of your search strategy and the price of your search. The price will depend on how many databases you have selected.
On the confirmation page, you can ensure that your reference, database selection and search criteria are correct before starting the search and being charged.

By clicking on **Preview Hit Count (2)** you can verify how many results are found for your search. This is free of charge.

Making Revisions Before Running the Search

If the number of retrieved is too high you can still modify your search criteria by clicking the "**Back (3)**,"-button at the bottom of the screen.

You can still:
✓ Change your database selection
✓ Change the classes
✓ Revise your mark
✓ Add variations by clicking the button Advanced Search Options (see 2.4 Advanced Options)

Click on **Print Page** at the top or at the bottom of your screen if you wish to print this page before continuing your search.

To proceed your search, click on **Analyze & Report (€)** at the bottom of your screen. The €-sign means you will be charged if you continue.
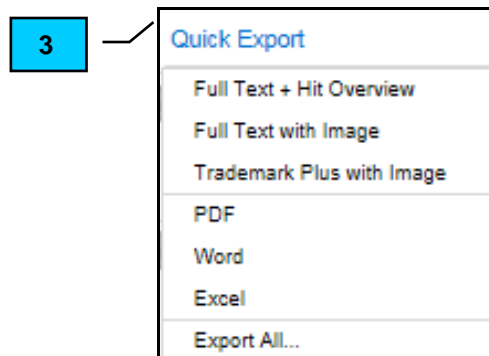
STEP 3 – Analyze & Report €

Once you have clicked **Analyze & Report (€)**, the hits are displayed in order of relevance and grouped by applied strategy. The result is automatically saved to the SERION Inbox. The table overview provides the **trademark name**, **database**, **status**, **class**, **goods and services**, **owner name** and **image**. Alternatively click the **Tile or Record (1)** button on the upper right to see the image view or the full text information for all retrieved trademarks.

To include results in your reports, you can select the relevant trademarks by ticking the arrow icons in the second columns **(2)**. If you want to export all trademarks, simply click the arrow icon in the title column.
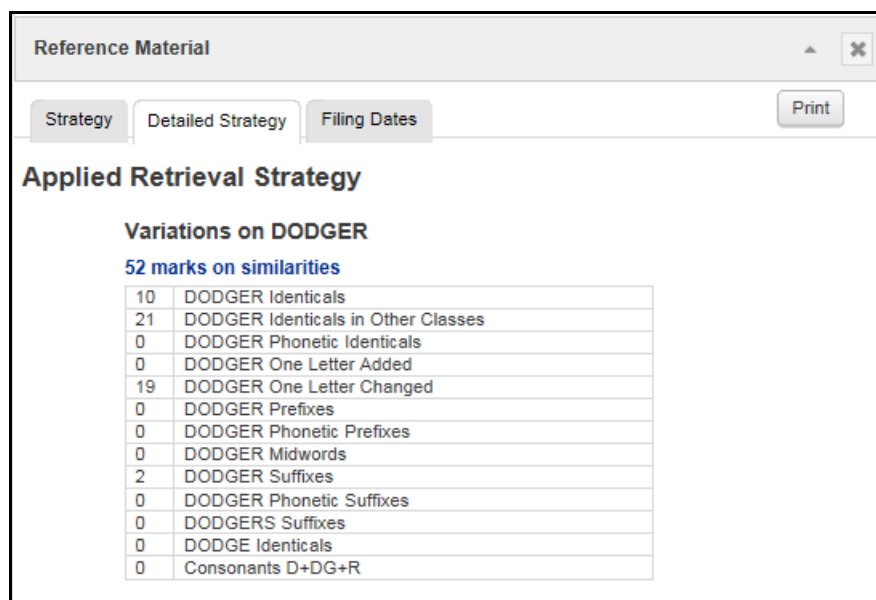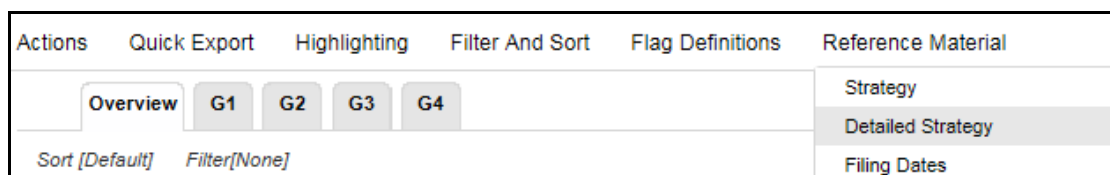
After having selected your desired trademarks for export, click on **Quick Export (3)** and select the format you wish to use for your search report. You can choose from standard SAEGIS formats or use a personalized template. The result list can also be exported to Word, Excel or PDF. Please see the Custom Search Chapter 3.6.4 for more information on creating your own templates.

3 → Quick Export

Full Text + Hit Overview

Full Text with Image

Trademark Plus with Image

PDF

Word

Excel

Export All...

Next to each trademark in the results list, you will notice a camera icon . By clicking this icon, you can consult the Internet for more information about a trademark and its owner and add this information to your SAEGIS reports. For more information about this Web Check functionality, please consult the Introduction Chapter, 1.5. Drill downs

For analysing your search results in SAEGIS, please consult the Custom Search Chapter 3.3.

Click on the menu **Reference Material (4)** and choose **Detailed Strategy** to view the **Applied Retrieval Strategy**. For each strategy you can verify the number or retrieved results. SAEGIS AutoScreen automatically generates predefined search strategies. Depending on the trademark (short or long word, combination of different words,…) different strategies will run against your trademark.

Actions   Quick Export   Highlighting   Filter And Sort   Flag Definitions   Reference Material

| Overview | G1 | G2 | G3 | G4 |

Strategy
Detailed Strategy
Filing Dates

Sort [Default]   Filter[None]

Reference Material

Strategy   Detailed Strategy   Filing Dates

Print

Applied Retrieval Strategy

Variations on DODGER

52 marks on similarities

10	DODGER Identicals
21	DODGER Identicals in Other Classes
0	DODGER Phonetic Identicals
0	DODGER One Letter Added
19	DODGER One Letter Changed
0	DODGER Prefixes
0	DODGER Phonetic Prefixes
0	DODGER Midwords
2	DODGER Suffixes
0	DODGER Phonetic Suffixes
0	DODGERS Suffixes
0	DODGE Identicals
0	Consonants D+DG+R

- You can sort your list on **Trademark**, **Database**, **Status**, **Class**, **Goods and Services** or **Owner Name** by clicking on the column headings. When printing or exporting the hit list, the chosen order will be maintained.
- If you want to perform another search, click on **New Search** to start your next search.

Remark:
The search has a limit of 2000 hits. If the maximum number of hits is reached, the frequently found non-identical hits (see 2.4.2.) will be excluded from the search results. If there are still more than 2000 hits after excluding these trademarks, the results will be cut off at 2000.

2.3 Database Templates

When you frequently search in the same registers, SAEGIS offers the possibility to create database templates. Using templates instead of manually selecting the required databases saves time when searching.
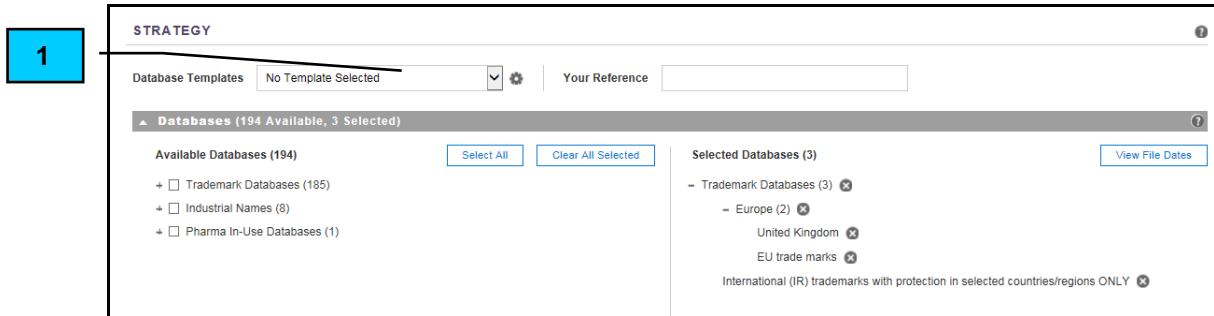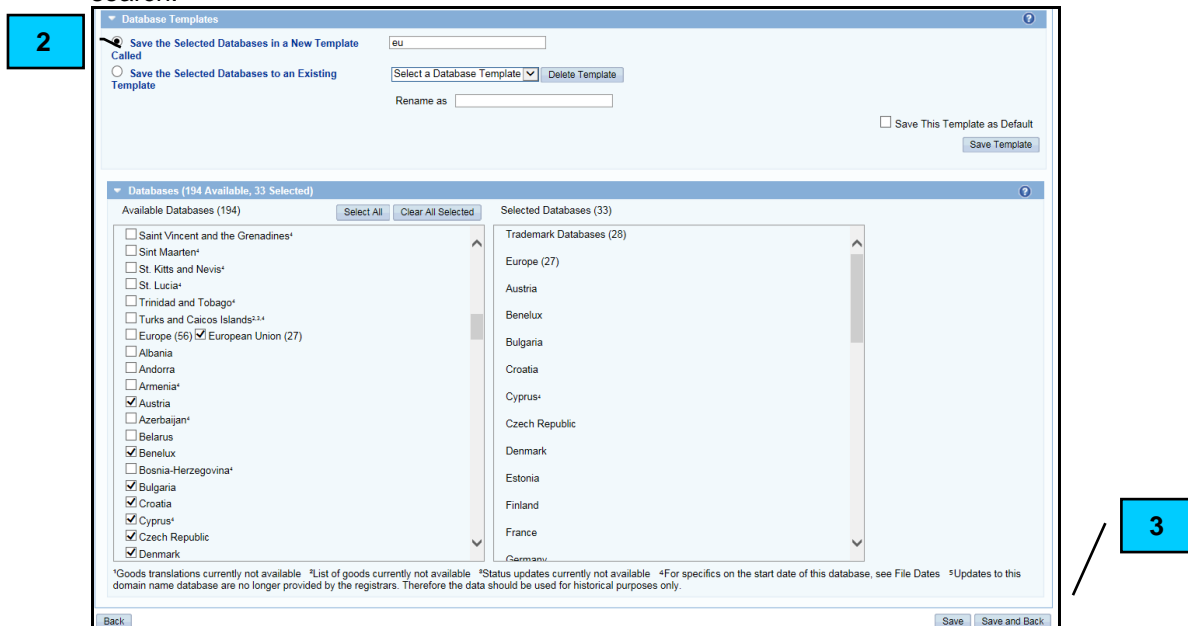
To create a database template, simply click on the wrench icon ⚙ next to the **Database Templates (1)** drop-down menu in the first screen of your SAEGIS search.

1

STRATEGY			❓
Database Templates	No Template Selected ⌄ ⚙	Your Reference	

Databases (194 Available, 3 Selected) ❓

Available Databases (194)   Select All   Clear All Selected   **Selected Databases (3)**   View File Dates

+ ☐ Trademark Databases (185)
+ ☐ Industrial Names (8)
+ ☐ Pharma In-Use Databases (1)

– Trademark Databases (3) ✖
  – Europe (2) ✖
    United Kingdom ✖
    EU trade marks ✖
International (IR) trademarks with protection in selected countries/regions ONLY ✖

In the database selection screen, select the required databases by ticking the boxes in front of them in the left window. When finished, tick the option **Save the Selected Databases in a New Template Called (2)** in the **Database Templates** box. Enter the name of your new template in the accompanying text box and click on **Save and Back (3)** to return to your search.

2

Database Templates ❓

🔍 ⦿ Save the Selected Databases in a New Template Called   eu

☐ Save the Selected Databases to an Existing Template   Select a Database Template ⌄ Delete Template

Rename as

☐ Save This Template as Default

Save Template

Databases (194 Available, 33 Selected) ❓

Available Databases (194)   Select All   Clear All Selected   Selected Databases (33)

Available	Selected
☐ Saint Vincent and the Grenadines[4]	Trademark Databases (28)
☐ Sint Maarten[4]	Europe (27)
☐ St. Kitts and Nevis[4]	Austria
☐ St. Lucia[4]	
☐ Trinidad and Tobago[4]	Benelux
☐ Turks and Caicos Islands[2,3,4]	
☐ Europe (56) ☑ European Union (27)	Bulgaria
☐ Albania	
☐ Andorra	Croatia
☐ Armenia[4]	
☑ Austria	Cyprus[4]
☐ Azerbaijan[4]	
☐ Belarus	Czech Republic
☑ Benelux	
☐ Bosnia-Herzegovina[4]	Denmark
☑ Bulgaria	
☑ Croatia	Estonia
☑ Cyprus[4]	
☑ Czech Republic	Finland
☑ Denmark	France
	Germany

[1]Goods translations currently not available [2]List of goods currently not available [3]Status updates currently not available [4]For specifics on the start date of this database, see File Dates [5]Updates to this domain name database are no longer provided by the registrars. Therefore the data should be used for historical purposes only.

Back   Save   Save and Back

3

You will now be able to select this set of databases from the drop-down menu next to **Database Templates** in all your future searches.

2.4. Advanced Options

SAEGIS AutoScreen is a fully automated screening tool. Nevertheless, some parts of the search strategy can be manipulated. This chapter explains how you can influence your AutoScreen search.

2.4.1. Advanced Search Options

At the bottom of the **Enter Strategy** screen, you will find the **Advanced Search Options (1)** button.

When clicking this button, a new screen will open.

Term Strength

Every search term automatically gets a **Term Strength (2)**. The different options are **Non-Dictionary**, **Dictionary**, **Neutral**, **Acronym**. These term strengths decide how thorough a term is searched. You can overrule the default setting by clicking on the arrow next to the term strength and changing the term strength. The system will adapt its search strategy accordingly.

Dictionary- Applying a "dictionary" strength to a word in your mark lets the program know that it is a recognized word and as such may not be a priority word. An example of this might be "Cannon Photography Studio." In this case, both the terms "Photography" and "Studio"

might be given dictionary strength because they matter, but they don't matter quite as much as "Cannon," which would be given the stronger non-dictionary strength.

Non-dictionary- Applying a "non-dictionary" strength to a word in your mark lets the program know that this word is important and should be searched thoroughly - as a standalone word and in combination with the other words in the mark. In the "Cannon Photography Studio" example above, if you had given "Cannon" non-dictionary strength, you'd get results that also included Canon and Can In.

Neutral- Applying a neutral strength to a word in your mark lets the program know that the word is so commonly used in trademarks and trade names that you don't particularly care about it. An example here would be searching on the mark "Bill's Bountiful Pizza Parlor." The terms "Pizza" and "Parlor" might be assigned a neutral strength in this case.

Acronym- Applying acronym to a word in your mark lets the program know that this grouping of letters should be treated as one word. This means that "ABC" entered as a mark and given acronym term strength would be searched for just as you wrote it -- ABC -- rather than in various permutations such as BCA, CBA, CAB, etc.

Remark:
SAEGIS AutoScreen uses internal dictionaries to determine whether a word is a "dictionary" word or not. The English language database is the most complete dictionary, but there are also smaller dictionaries for the other languages of the SAEGIS interface. Because of this, a foreign-language dictionary word will not always be recognised as such.

Trademark Variations

You can enter up to three additional **Trademark Variations (3)** of your trademark. SAEGIS will search these variant terms, but it will search them strictly identical. This can be useful when you want to include translations or phonetic variations in the search. The plural form + 's, + s will be added. However, the 's' will not be dropped. No irregular plurals will be searched.

Example: when searching "Red Moon", you might want to add variations like "Blue Moon" or "Red Star".

SAEGIS AutoScreen will automatically include a number of **alternatives**. These will be displayed under the term strength drop-down menu.

Examples: - when searching for "Superstar", SAEGIS AutoScreen includes as alternative
                  a split between the words "Super" and "Star".
                  - when searching for "bo@", SAEGIS AutoScreen suggests "boa" and "boat".

Ex. 1   Ex. 2

	SUPERSTAR
Term Strength	Dictionary
Alternative	☑ SUPERSTAR SUPER STAR

	BO@
Term Strength	Non-Dictionary
Alternative	☑ BO@ BOA
Alternative	☑ BO@ BOAT

Example: when searching the German word "Erzengel", SAEGIS AutoScreen will
                  choose **Non-Dictionary** as term strength. This will result in a broader search
                  than when set to **Dictionary**. You can set the strength back to dictionary if
                  you want to narrow down the search.

Click on **Next** to confirm your Advanced Search Options and continue your search.

2.4.1.1. Searching Numbers

When searching numbers, SAEGIS AutoScreen also includes the written alternatives, even in foreign languages. Please note that SAEGIS AutoScreen will give you more alternatives when entering the number itself.

	28	
Term Strength	Dictionary	
Alternative	☑	28 TWENTY EIGHT
Alternative	☑	28 TWENTYEIGHT
Alternative	☑	28 VENTIOCHO
Alternative	☑	28 ACHTUNDZWANZIG
Alternative	☑	28 VENTOTTO
Alternative	☑	28 ACHTENTWINTIG
Alternative	☑	28 VINGT HUIT
Alternative	☑	28 VINGTHUIT

2.4.1.2. Searching Slogans

If you want to search a slogan, it is best to enter the complete slogan. Limiting the slogan to the most important words, like in SAEGIS Custom Search and SAEGIS Identical Screening Search, is not necessary. SAEGIS AutoScreen will define which words are considered as dictionary, non-dictionary or neutral and develop a tailored strategy for your slogan accordingly.

	PROBABLY	THE	BEST	BEER	IN	THE	WORLD
Term Strength	Dictionary	Neutral	Dictionary	Dictionary	Neutral	Neutral	Dictionary

Remark:
Please note that three or more words are considered as slogans by SAEGIS AutoScreen.

2.4.1.3. Searching Acronyms

If you want to search for acronyms, keep in mind that SAEGIS AutoScreen will not automatically recognize your entry as an acronym, but as non-dictionary or dictionary. However, you can manually change the **Term Strength** into Acronym if you want SAEGIS AutoScreen to apply specific strategies for letter words and acronyms.

Examples: - when searching for the acronym "B.B.C.", change the term strength from "Non-Dictionary" to "Acronym" for a broader search with more variations.
- when searching for acronyms that exist as a dictionary word, like "SMART", change the term strength into "Acronym" if you want a broader search.

Remark:
The term strength Acronym will never be chosen automatically by SAEGIS AutoScreen. This is the only occasion we advise you to change the term strength.

2.4.2. Frequently Found Non-Identicals

When your search includes a trademark that is not identical to the one you entered and that is frequently found (at least 100 hits) among your results, it will be put aside in order not to pollute your search results. However, you still have the possibility to look at these frequently found non-identicals by clicking the link **Separate List (1)** in the **Analyze & Report** page. These marks tend to be combinations of "Dictionary Terms", sometimes these can be relevant marks, so it is always wise to review them. For an example of how this works, refer to the screen shot below.

If you want to include all frequently found non-identical hits in your results, click the **Include**-link **(1)**. You can select the trademarks that you are interested in by ticking the arrow icons in the second columns **(2)** to include them in your report. Simply click the arrow icon in the title column if you want to export all trademarks **(3)**.