



# HeliosComplete™ Release Notes

Version: 21.3.4 (sprint)

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**TITLE: NEW INTEGRATION CONTROL FLAGS**

**Description:** As a user I want to be able to control which parts of the Docket Engine integration are run at the account and matter level so I can turn off features when they are not needed to improve performance and reduce storage usage.

**Explanation:**

Sync Bibliographic Information controls whether we sync biblio data such as filing date, publication number, etc.

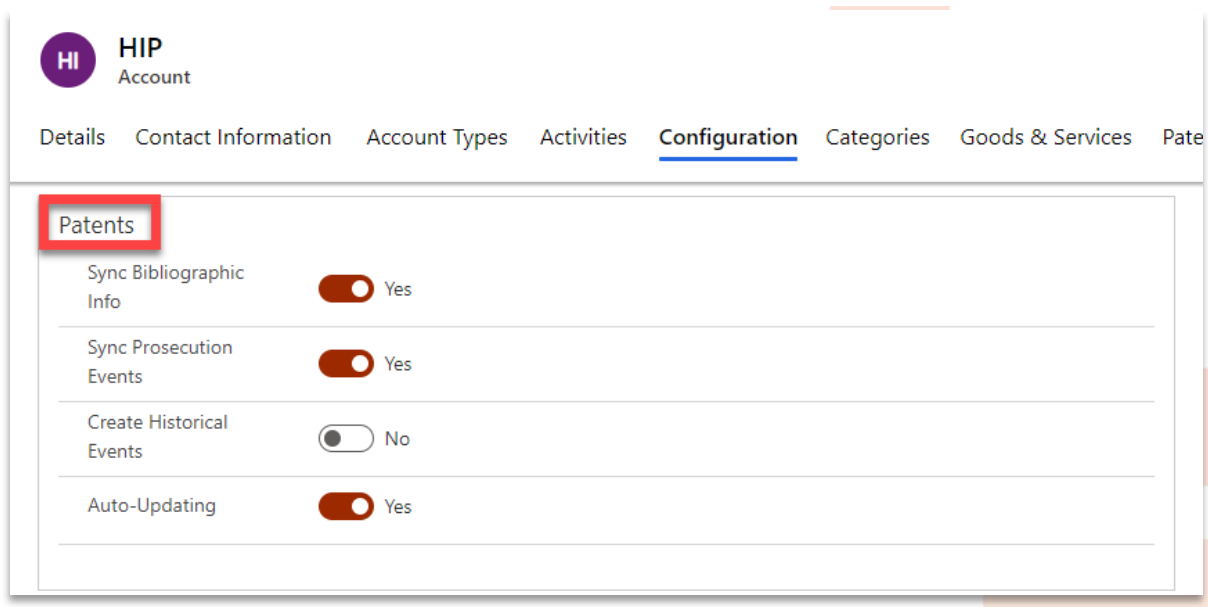
Sync Prosecution Events controls whether we sync the prosecution events and associated docket tasks/actions

Create Historical Events controls whether when pulling in prosecution events we create or update tasks/actions for events that have a final due date of today or earlier

Enable Auto-Updating controls whether we label the application and flag the matter for nightly biblio and prosecution updates

**\*\*Note:** If 'Enable Auto-Updating' is toggled to off, the existing label will be cleared

**See Also:** [Trademarks](#)

**TITLE: PAGE LAYOUT REDESIGNS**

**Description:** We're constantly looking for ways to streamline the user experience for our clients and have decided that one of the best ways to do this was reorganize the page layouts within our various matter types.

**Explanation:** For Patents: changes to the bibliographic information tab, changes to the integration tab, we've brought owner to the header area, and have reworked the documents tab.

**See Also:** [Trademarks](#), [Designs](#)

## BUG FIXES

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### TITLE: PARENT PATENT INHERITANCE

**Description:** If a patent is created with a parent patent, or updated to have a parent patent, it will inherit the following from the parent: PTE Matter, Priority Matter, Terminal Disclaimer

**Explanation:** Bug Fixed

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### TITLE: BUSINESS PROCESS FLOW (PROSECUTION PATH) AUTO-ADVANCE FIXES

**Description:** There was a bug that was allowing Skip flags to potentially be ignored, causing a stage to be passed even if it was not complete

**Explanation:** Bug Fixed

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### TITLE: FAMILY TREE FAILED TO LOAD

**Description:** In some situations, the control failed to load when opening a matter record (tree would be blank)

**Explanation:** Bug Fixed

**See Also:** [Trademarks](#), [Designs](#)

**TITLE: NEW INTEGRATION CONTROL FLAGS****Description:****Explanation:**

Sync Bibliographic Information controls whether we sync biblio data such as filing date, publication number, etc.

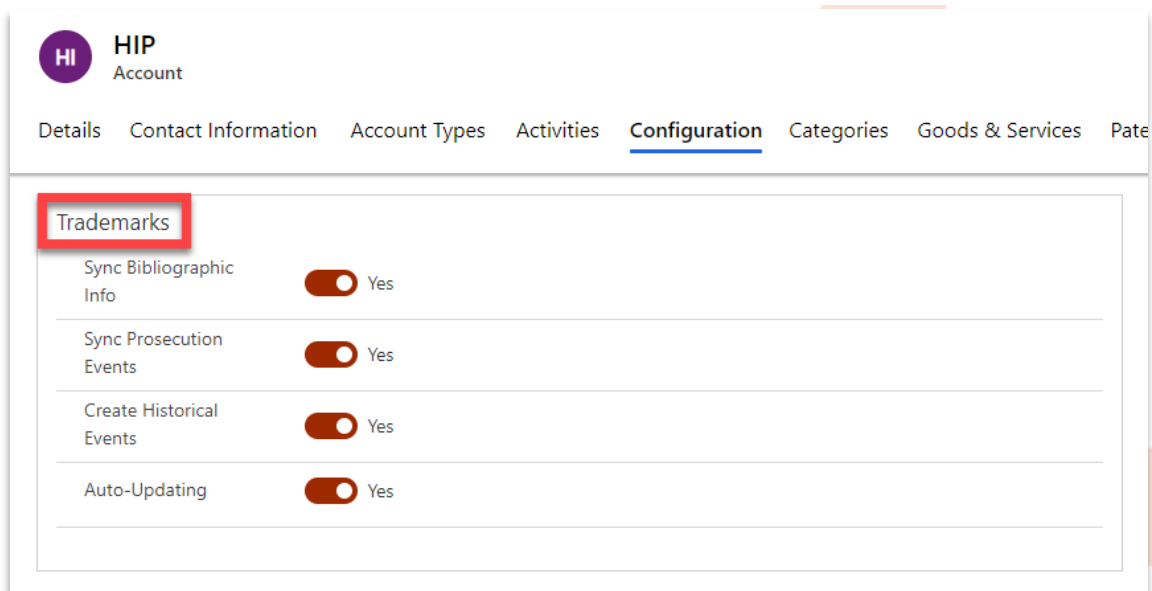
Sync Prosecution Events controls whether we sync the prosecution events and associated docket tasks/actions

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Enable Auto-Updating controls whether we label the application and flag the matter for nightly biblio and prosecution updates

**\*\*Note:** If 'Enable Auto-Updating' is toggled to off, the existing label will be cleared

**See Also:** [Patents](#)

**TITLE: PAGE LAYOUT REDESIGNS**

**Description:** We're constantly looking for ways to streamline the user experience for our clients and have decided that one of the best ways to do this was reorganize the page layouts within our various matter types.

**Explanation:** For Trademarks: changes to the bibliographic information tab, changes to the integration tab, and we've brought owner to the header area.

**See Also:** [Patents](#), [Designs](#)

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**TITLE:** FAMILY TREE FIX

**Description:** In some situations, the control failed to load when opening a matter record (tree would be blank).

**Explanation:** Bug Fixed

**See Also:** [Patents](#), [Designs](#)

## DESIGNS

### USER STORY

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#### TITLE: PAGE LAYOUT REDESIGNS

**Description:** We're constantly looking for ways to streamline the user experience for our clients and have decided that one of the best ways to do this was reorganize the page layouts within our various matter types.

**Explanation:** For Designs: changes to the integration tab, we've brought owner to the header area, and have brought integration status to the header area.

**See Also:** [Patents](#), [Trademarks](#)

### BUG FIXES

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#### TITLE: FAMILY TREE FAILED TO LOAD

**Description:** In some situations, the control failed to load when opening a matter record (tree would be blank).

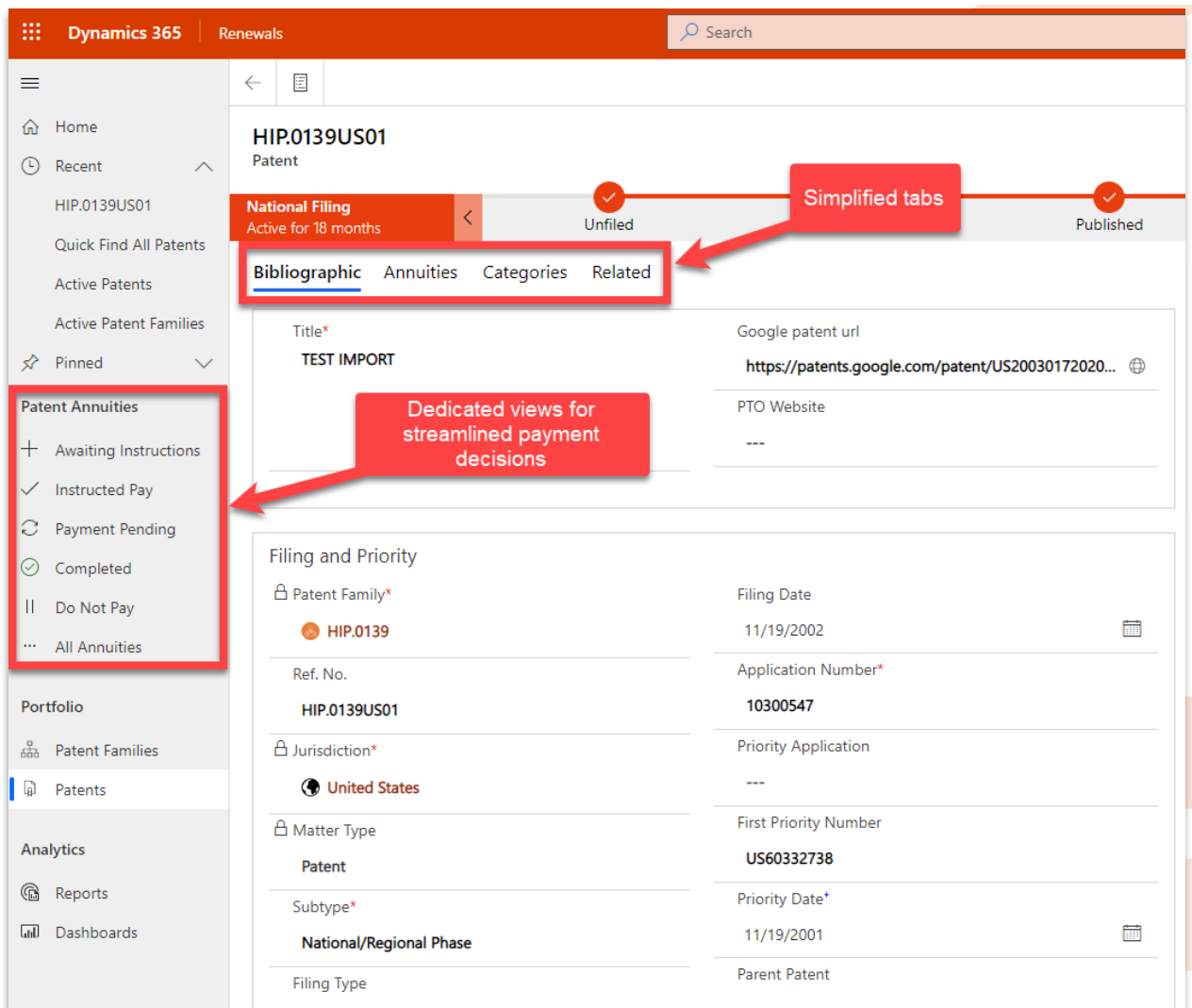
**Explanation:** Bug Fixed

**See Also:** [Patents](#), [Trademarks](#)

**TITLE:** NEW HELIOSCOMPLETE APP, RENEWALS+

**Description:** We've had market inquiries about whether we could provide a Renewals service with light portfolio management software, so we're delighted to debut our newest app – Renewals+.

**Explanation:** The new app will be full services with light software which will feature no docketing, but will be a streamlined experience for clients to enter the system and make decisions on their maintenance fee payments (which then seamlessly get executed by the HIP team)

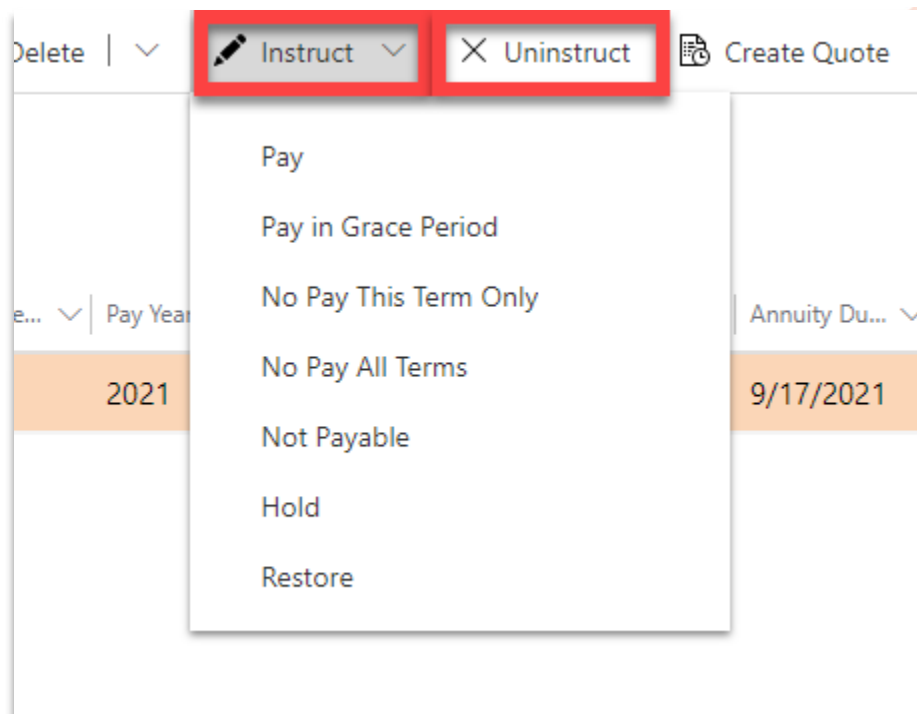


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## TITLE: ANNUITIES INSTRUCT, UNINSTRUCT

**Description:** As a user I want to be able to instruct one or more annuity at a time so the system can lock down the record and audit the instruction to make it clear when an annuity has been officially instructed or not. Additionally, on occasion I will need to change the instruction on an annuity.

**Explanation:** Due to the nature of an instruct action, the only way a change can be made to a payment decision is via the uninstruct action. Uninstruct will clear the instructions and related fields to ensure that the record can be reinstructed. On occasion, it is possible that the instruct or uninstruct actions will be prevented due to the state of the selected annuities (e.g., the date for instructions has already passed, etc.). If a batch of annuities is selected and at least one record is uninstructable, the platform will display an alert with the reason.





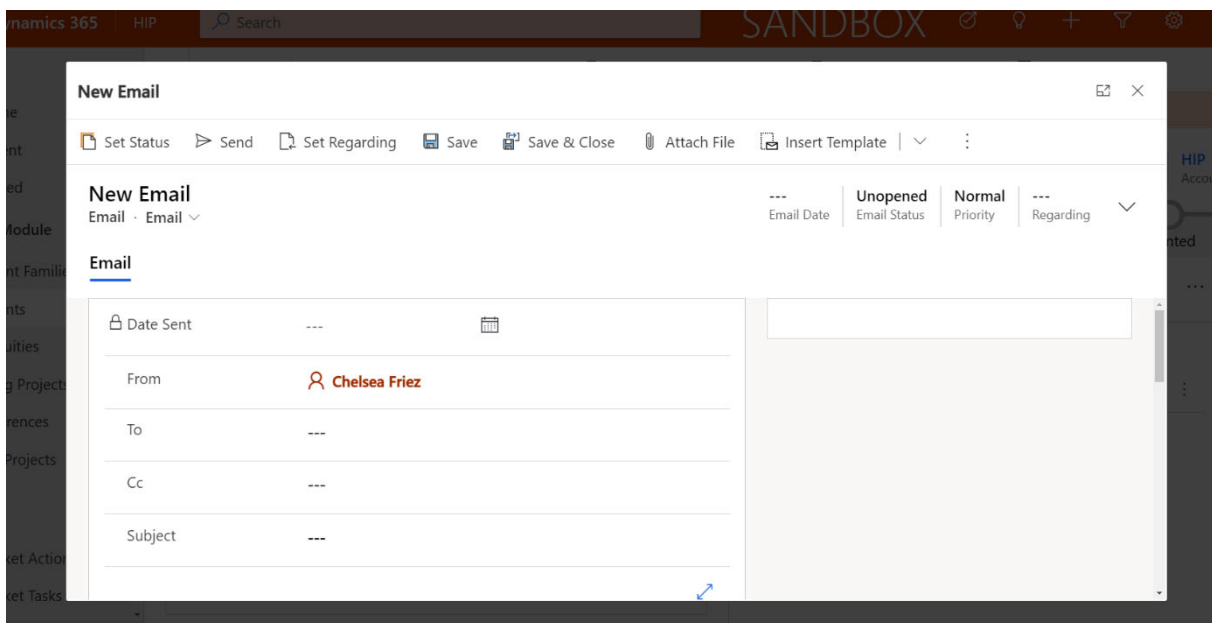
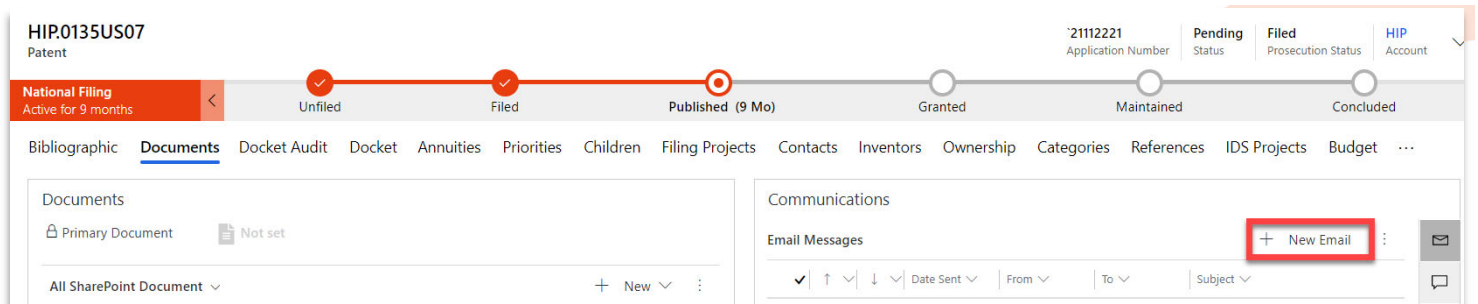
## MISCELLANEOUS

### USER STORY

#### TITLE: EMAIL COMPOSE EXPERIENCE

**Description:** As a user I want a contextual email compose experience that allows me to write an email related to a record (including attachments), without leaving that record.

**Explanation:** We've modified the email compose experience to allow users to easily write an email regarding a record, without having to leave that record.



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#### TITLE: LICENSE BASED DOCKETING PRIVILEGES

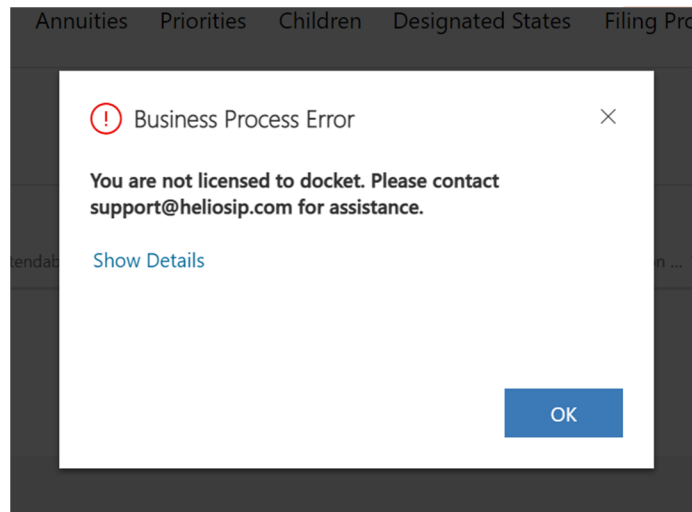
**Description:** We are releasing a new app (Renewals+) which includes a slimmed down version of our software. Due to the light nature of this new software, users will have different license types and will not have the ability to docket, so this change is to specify that our full HeliosComplete users do have that ability

**Explanation:** When attempting to docket an action (or task) the platform will now verify a user's roles and ensure they have the proper permission. A user is only licensed to docket with one of the following roles:

- System Administrator
- HIP – Core – CRUD
- HIP – License – Patents
- HIP – License – Trademarks
- HIP – License – Designs

License types which cannot docket are:

- Renewals+ app licenses



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#### TITLE: INTEGRATION FIELD LOCKS

**Description:** Mapped fields that are involved in integration requests/responses are locked while integration processes are in progress.

**Explanation:** As a user I want to be able to have the platform lock fields that are potentially going to be leveraged during an integration process, to ensure that all fields values are sent and updated correctly.

## TITLE: NEW KNOWLEDGE RIBBON (WOLTERS KLUWER BROWN BOOK INTEGRATION)

**Description:** IP is full of complex rules and deadlines, and as part of our commitment to be the best IPMS on the market, we've now added a Wolters Kluwer Brown Book integration into HeliosComplete.

**Explanation:** What this means for you is that if you're on a matter, you can click the knowledge button to find out rules specific to that jurisdiction. If you need to do a general search, you can click "Knowledge" in the ribbon at the top of the page and sort through the comprehensive reference materials. The knowledge feature offers both contextually aware filtering and suggested search (see images below).

The screenshot displays the HeliosComplete interface for a patent matter (P0103ZA01). The Knowledge Ribbon is visible at the top, and a search for "South Africa" has been performed, resulting in one article: "How to Pay Patent Maintenance Fee in South Africa (ZA)". A red callout box explains that because this is a ZA matter, South Africa automatically gets filled in when the knowledge button is clicked. To the right, a table titled "All Articles" lists various articles related to patent maintenance fees and renewals in different jurisdictions, all published by Ralph Schroeder.

Article Public Number	Title	Owner	Status
KA-01024	How to Pay Patent Maintenance Fees in Italy (IT)	Ralph Schroeder	Published
KA-01038	How to Pay Patent Maintenance Fees in Japan (JP)	Ralph Schroeder	Published
KA-01005	How to Pay Patent Maintenance Fees in Spain (ES)	Ralph Schroeder	Published
KA-01028	How to Pay Patent Maintenance Fees in United States	Ralph Schroeder	Published
KA-01023	How to Pay Patent Maintenance in ARIPO (AP)	Ralph Schroeder	Published
KA-01013	How to Pay Patent Renewals in EPO (EP)	Ralph Schroeder	Published
KA-01011	How to Pay Patent Renewals in The Netherlands (NL)	Ralph Schroeder	Published
KA-01026	How to Setup Assignment Record	Ralph Schroeder	Published
KA-01021	How to Track and Monitor Annuity Payments	Ralph Schroeder	Published
KA-01015	How to Track Annuity Payment Orders (Agent Instructions)	Ralph Schroeder	Published
KA-01025	How to Use the Japanese Patent Website	Ralph Schroeder	Published

## TITLE: TRIGGER AUTO-COMPLETE

**Description:** As a user I want to see both the activity name and the related action/task outcome name inside the docket action/task auto-complete, to allow me to pick the correct value.

**Explanation:** In the past, when adding certain items (e.g., docket tasks or actions) there would be multiple values with very similar names. This caused users confusion as to which option to select. Now, we show outcome name with these options to allow the user to more accurately choose the appropriate option.

The screenshot shows the HeliosComplete interface for a patent matter (HIP0025US01). The Action Type dropdown menu is open, displaying a list of actions related to 371 Defective Response and 371 Formalities Notice. The dropdown menu is highlighted with a red box, and the text "371" is visible in the search field above it.

Action Type
Notification of 371 Defective Response [M916]
371 Defective Response - Form M916
Notice to File Missing Parts - Correct Defective...
371 Defective Response - Form M916
371 Formalities Notice [PCT/DO/EO/923]
371 Formalities Notice Received
Notice to File 371 Formalities Response
371 Formalities Notice Received
Documents submitted with 371 Application (P...
Documents submitted with 371 Application Receiv...
Notice of 371 Conversion to Regular Review
Notice of 371 Conversion to Regular Received

## TITLE: ADVANCED LOOKUP

**Description:** New modal experience for lookup fields that allows for easier review and selection of existing records.

**Explanation:** As a user I want to see more information about possible records when populating a look-up field so I can more easily find the record I am looking for.

The screenshot shows the 'HIP.0135US07' Patent form. The 'National Filing' status is 'Active for 9 months'. The 'Priority Application' dropdown menu is open, showing a search bar with the text 'Look for Priority Application' and a magnifying glass icon. Below the search bar, a list of patents is displayed, including 'HIP.0135AU01', 'HIP.0135EP01', 'HIP.0135ES01', and 'HIP.0135ES02'. A red box labeled '1' highlights the search bar, and a red box labeled '2' highlights the 'Advanced lookup' button at the bottom of the dropdown menu.

The screenshot shows the 'Choose patent for Priority Application' modal. It features a search bar at the top and a table of patents. The table has columns for 'Ref. No.', 'Application Number', 'Title', and 'Inventors'. The patents listed include 'HIP.0135AU01', 'HIP.0135EP01', 'HIP.0135ES01', 'HIP.0135ES02', 'HIP.0135US01', 'HIP.0135US02', 'HIP.0135US03', 'HIP.0135US04', 'HIP.0135US05', 'HIP.0135US06', 'HIP.0135US07', and 'HIP.0135US08'. A red box labeled '3' highlights the entire modal. At the bottom, there is a 'Selected record' field and 'Done' and 'Cancel' buttons.

Ref. No.	Application Number	Title	Inventors
<input type="radio"/> HIP.0135AU01	1212121212	TEST FAMILY	
<input type="radio"/> HIP.0135EP01	12121212	TEST FAMILY	
<input type="radio"/> HIP.0135ES01	451523	TEST FAMILY	
<input type="radio"/> HIP.0135ES02	1111111	TEST	
<input type="radio"/> HIP.0135US01	123456	TEST FAMILY	
<input type="radio"/> HIP.0135US02	10300547	TEST FAMILY	
<input type="radio"/> HIP.0135US03	10300457	TEST FAMILY	
<input type="radio"/> HIP.0135US04	16432907	TEST FAMILY	
<input type="radio"/> HIP.0135US05	1212121212	TEST FAMILY	
<input type="radio"/> HIP.0135US06	10300547	TEST FAMILY	
<input type="radio"/> HIP.0135US07	21112221	TEST	
<input type="radio"/> HIP.0135US08	12111212	TEST	

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**TITLE: OWNER INHERITANCE FIXES**

**Description:** User Created Docket Tasks/Actions now inherit owner from Matter (instead of the owner being the person who created the docket task/action)

**Explanation:** Previously, when Helios IP employees would docket into the system, it would make that user the owner of the task/action. This caused some problems for clients who did not have permissions to see the docket items. With this fix, the client owner now owns the docket items and can view them in the system.