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Introduction

Welcome to Version 3.0 of *IP LegalForm*TM. With our new Forms Manager, opening, filling, saving, retrieving and printing of intellectual property law forms was never easier. You can now organize your forms in a folder by client or matter number. You can easily search for existing folders by matter number or client as well.

Installing *IP LegalForm*TM

To install *IP LegalForm*TM, simply follow the instructions on Disk 1, i.e., install Disk 1 into your floppy drive, select **Start**, click on **Run**, and type a:/Setup.

Opening *IP LegalForm*TM

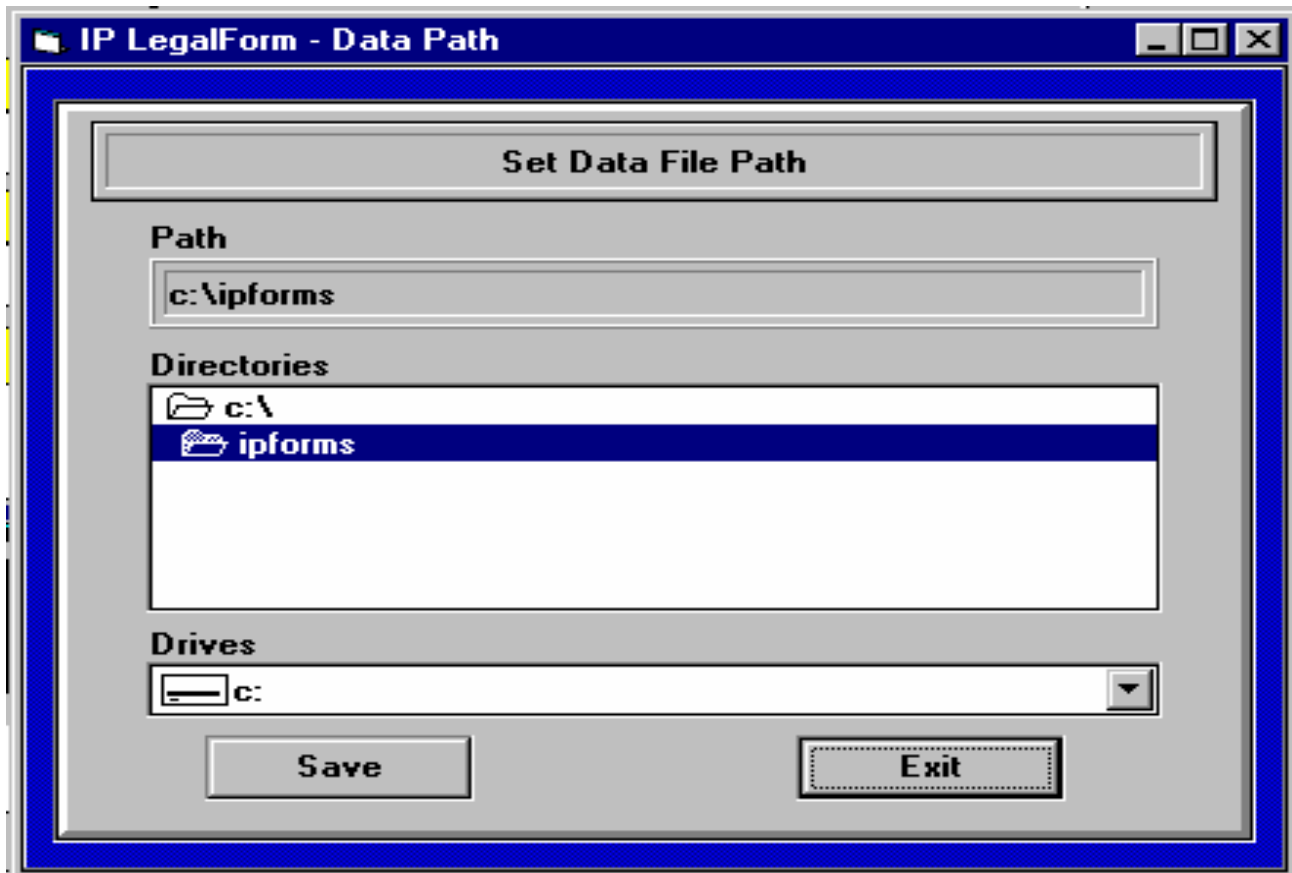


IP LegalForm Pro

To open *IP LegalForm*, **Double-click** the *IP LegalForm* icon on your desktop. Once open, we recommend you minimize, rather than close, the program for future use during the day.

Running *IP LegalForm*TM for the First Time (Setting up a Data Path)

The first time you run *IP LegalForm* Version 3.0 you should set the data path from the **Utilities** menu. The data path will determine where the data for your forms will be saved. Setting a data path enables you to store all form data files in a central location for easy backup and housekeeping purposes.



The Forms Manager

After launch, the Forms Manager main screen will appear. The Forms Manager allows you to organize your forms in folders. The folders are identified by “Matter/File Number”, “Client Name”, “Date” and/or “Long File Name”. You can search for individual form folders by matter name or client name. The active Folder of Forms appears on the bottom right hand side of the screen. Fill out the header information for the active Folder by typing in the matter number and client name.

The screenshot shows the IP LegalForm - [FLM] application window. The title bar includes the application name and standard window controls. The menu bar contains File, Edit, Data, Utilities, References, Postcards, Drawing Labels, and Help. The toolbar includes buttons for Bold (B), Italic (I), Underline (U), navigation arrows, New Folder, Delete, Search, Next, and Exit.

The main interface is titled "Forms Manager" and contains several input fields and a table:

- Matter/File Number:** An empty text input field.
- Client Name:** An empty text input field.
- Date:** A text input field containing "05/29/1998".
- Long File Name:** An empty text input field.
- Notes:** A large empty text area.
- Buttons:** "Add Forms to Folder", "Open Active Form", and "Open All Forms".
- Folder of Forms:** A section containing a table with columns "Form Name", "Form Description", and "Code".

Instructions in the center of the screen read: "Double-Click on the Name of the Form that you wish to Open or Click on the Name of the Form that you wish to Make Active".

The status bar at the bottom shows "Record 2/2", "Field Form1", "Row 8", "A", and "Pg 1/7".

Adding Forms to a Form Folder

This close-up shows the "Add Forms to Folder" button in blue text on a grey background. Below it is the "Active Form" field, which is currently empty.

Click on the “Add Forms to Folder” button. This will take you to the index of forms. First select a form category (patent*, trademark, etc.) and then select a form that you want to add to the folder by clicking on the form name.

The dialog box shows a list of form categories with checkboxes:

- Patent Forms
- Trademark Forms
- Service Mark Forms
- Copyright Forms
- PCT Forms

Below the categories is a "Return to Forms Manager" button and a list of form names:

Form Name
PO1Large.FRP
PO1Small.FRP
PO1DLrg.FRP
PO1DSml.FRP

* The Patent Index includes forms designed by LegalStar, which are indicated by a P before the form number. The Patent Index also includes all the official USPTO forms which are indicated by an Sb before the form number.

Once a form is selected, you have three options. You can open the form immediately and add it to the active folder by **clicking** on the button below:



Or, you can add the selected form to the active folder, but open the form later. This option allows you to add the form to the active folder and then return to the index of forms so that you can continue to add additional forms to the active folder. To add forms to the active folder for later opening, **click** the button below:



Finally, you can open a form without adding it to the folder of forms. You can use this option if you want to fill out a form without saving it. Use the button below for this option:



After you have made your selection, **click** on the “Return to Forms Manager” button. This will take you back to the main Forms Manager screen. The active folder will now contain all the forms you selected.

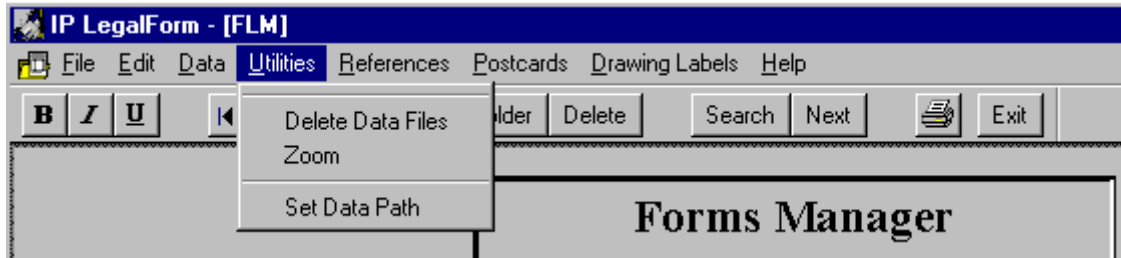
Opening a Form

There are three ways to open a form from the main Forms Manager Folder of Forms. **1.) Double-click** on the name of the form and it will open; or, **2.) Single-click** on the name of the form to make it the Active Form and then **click** on the “Open Active Form” button, or, **3.) Click** on the “Open all Forms” button (which opens all forms in the folder.)

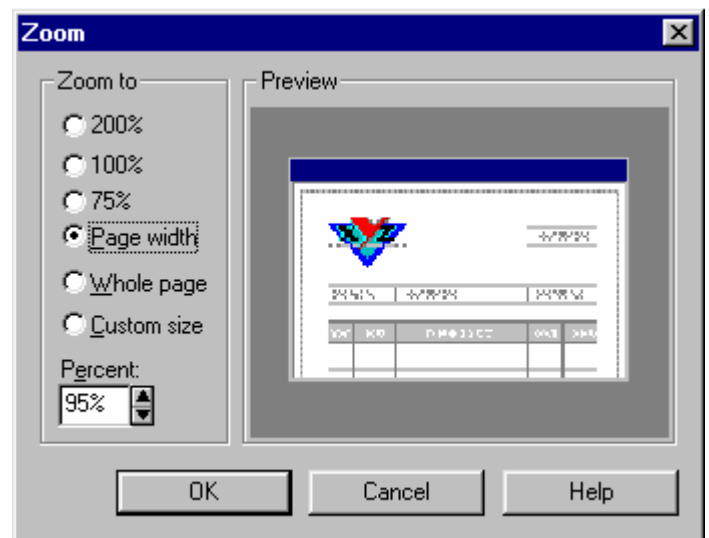
Add Forms to Folder	Double-Click on The Form Name That You Wish or Click on The Form Name That You Wish To M	
Active Form P01Large.FRP	Folder of Forms	
Open Active Form	Form Name	Form Description
Open All Forms	P01Large.FRP	Patent Application Transmittal Letter (

Changing the View of a Form

To change the magnification of a form as you are filling it, select "Utilities" from the task bar, and then select "Zoom".



With the "Zoom" function, you can enlarge the form or any part of the form for ease in filling.



Printing a Form or Group of Forms

To print all pages in a single form, open it and then **click** on the printer icon located on the command ribbon. You can also print a form by selecting "File" from the menu bar and then "Print".

Saving a Form

To save a form and its associated data, **click** "Save" on the command ribbon. The form and data are then saved within the active folder. The form and data are also saved when you **click** "Close".

Copying a Form

After opening a form you can create duplicate blank or filled copies of the form as follows: First fill out any fields that you would like to appear on subsequent copies. Next **click** on the “Copy” button. Next **click** on the “Triple Page” icon on the command ribbon. Finally navigate through the copies by **clicking** on the “Up Arrow” and “Down Arrow” buttons on the command ribbon.



Navigating Through the Forms Within a Folder

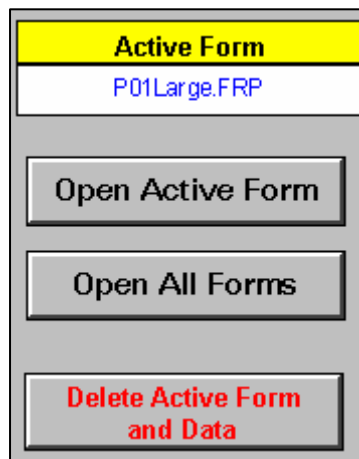


If you have opened all of the forms in a folder, you can navigate through the folder by **clicking** on either the “Right Arrow” or “Left Arrow” buttons located on the command ribbon. The “Right Arrow” button will take you into the next form and the “Left Arrow” button will take you to the previous form.

Returning to the Forms Manager

After the form is complete and you are ready to return to the forms manager **click** on the “Close” button located on the command ribbon. If you have multiple forms open you will have to close all of the forms before returning to the Forms Manager.

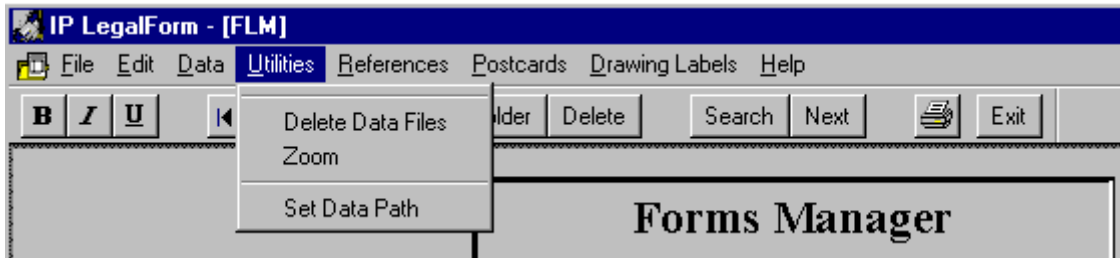
Deleting a Form from a Folder



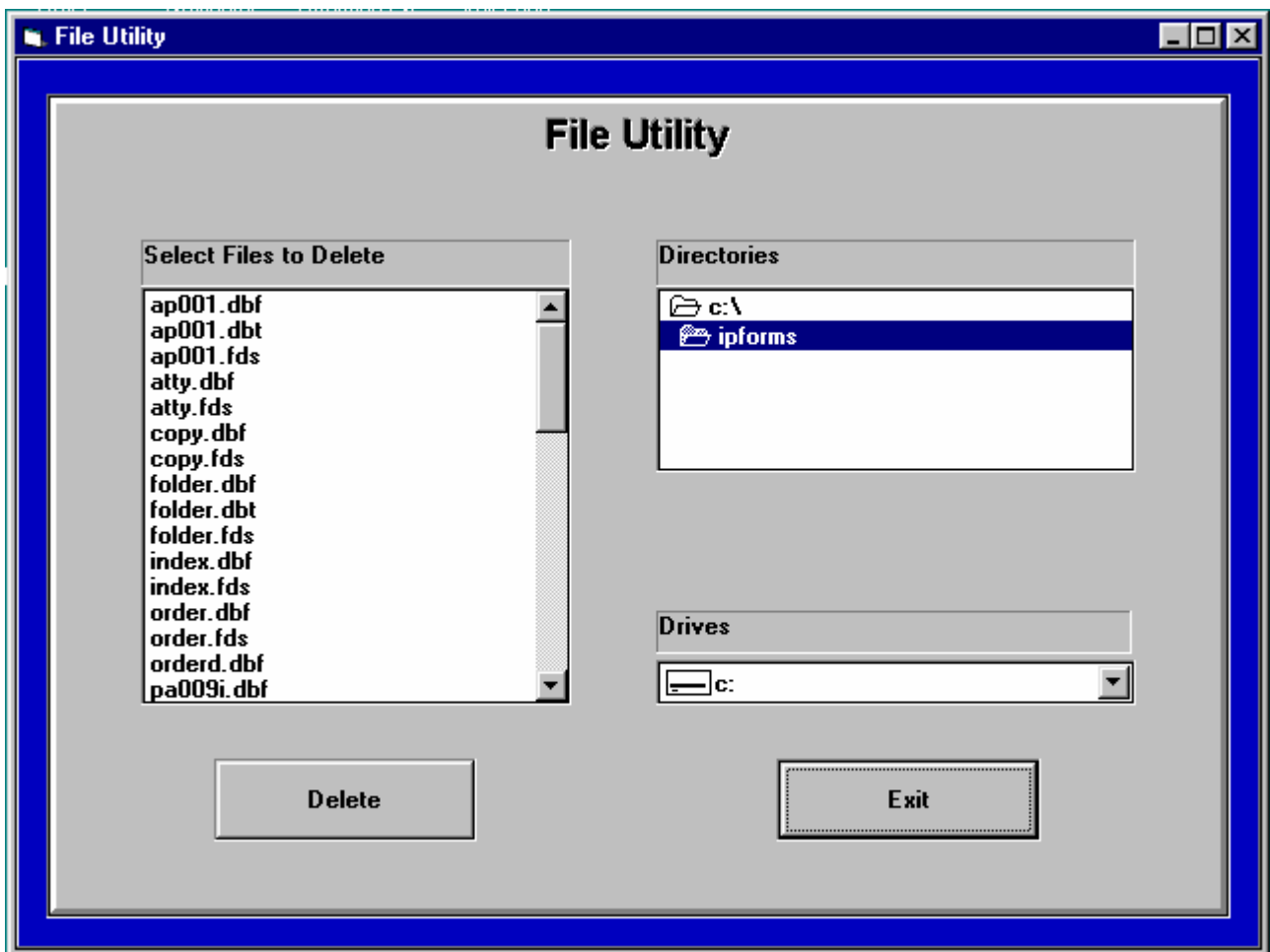
To delete a form from a folder you must first **click** on the name of the form to make it the active form. After the name of the form appears in the active form box you can **click** on the “Delete Active Form and Data” button. When you delete the active form it will also delete any data file associated with that form.

Deleting Data Files (Housekeeping)

Occasionally it may be necessary to delete multiple data files (as opposed to single forms or folders). We recommend that you use this feature sparingly and that deletion of files be done by a system administrator to ensure that valuable data is not lost. This housekeeping can be accomplished by first clicking on "Utilities" from the task bar and then selecting "Delete Data Files":



Once the "File Utility" screen below appears, you can select data files to delete. There are three types of data files: "dbf" are main data files; "dbt" are header files; and "fds" are footer files. All three types of files should be deleted for a specific file name.

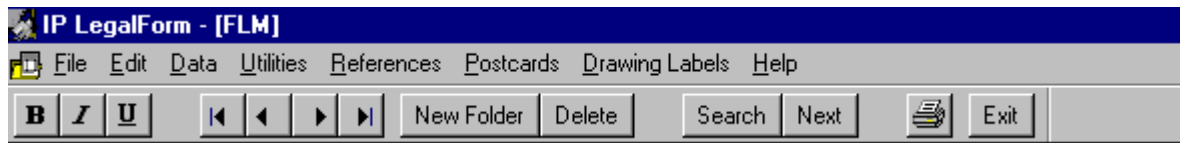


Saving a Folder

No action is required to save a folder. Folders are saved automatically upon exiting the program or opening another folder.

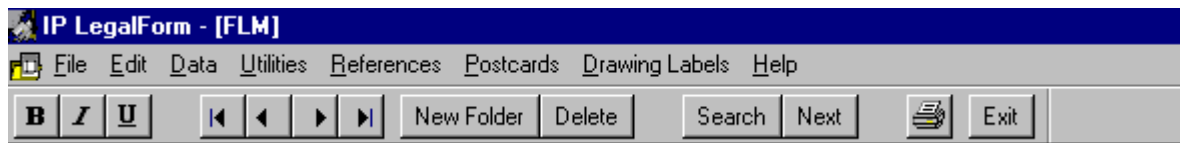
Deleting a Folder

To delete a folder, **click** on the **Delete** button which is located on the command ribbon. When you delete a folder, all of the forms and data associated with those forms will be deleted.



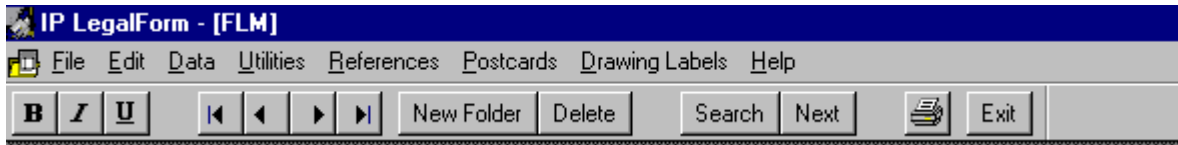
Setting up a New Folder

To create a new folder **click** on the "New Folder" button which is located on the command ribbon in the Forms Manager. If you are working on the last record, you can create a new folder by clicking on the next record or "right arrow" button on the command ribbon.

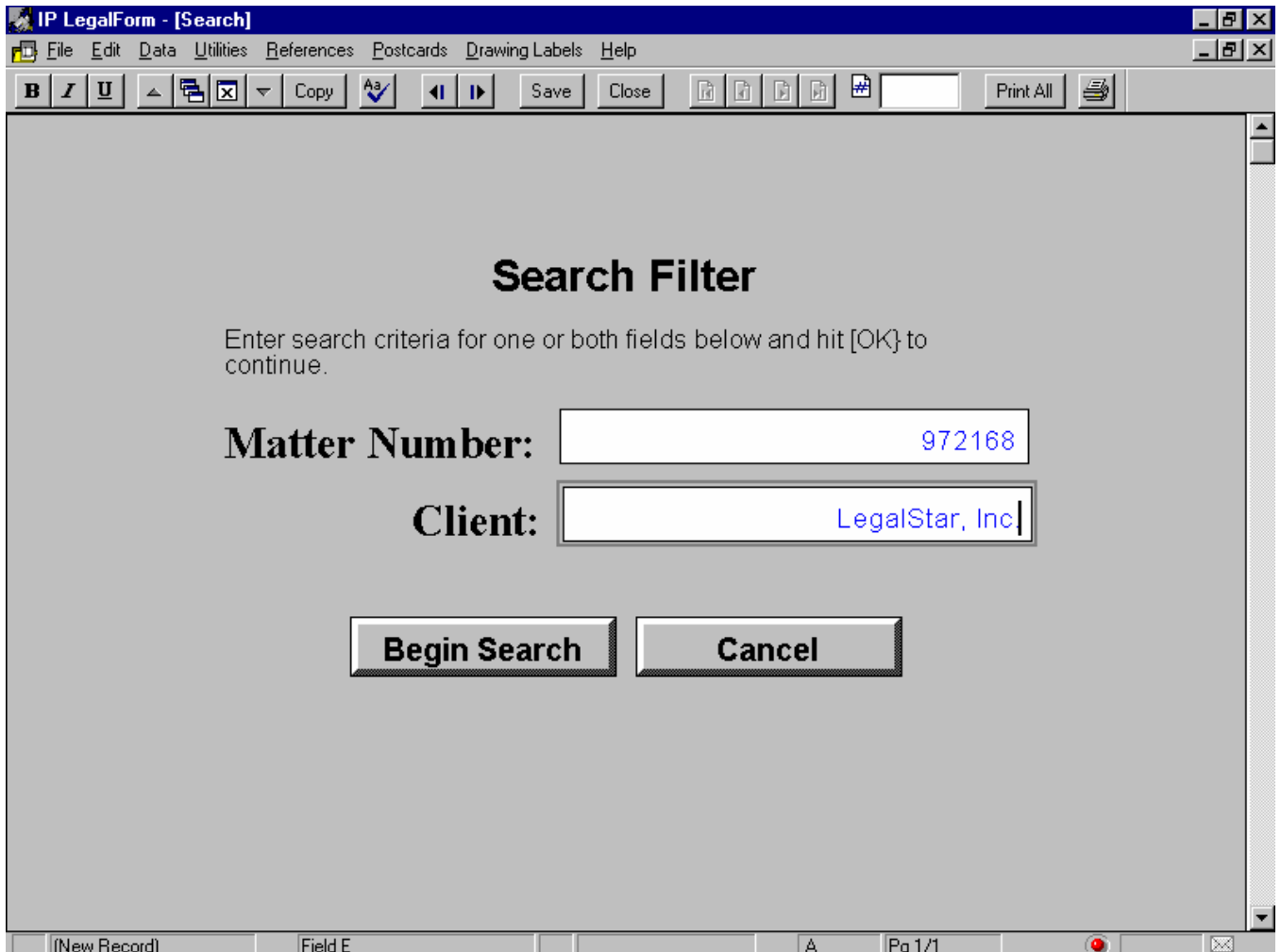


Searching the Folders

There are two ways to search for a previously created folder. First, you can **click** on the arrow keys on the command ribbon to scroll through the folders one record at a time.



Second, you can **click** on the “Search” button located on the command ribbon to search by matter number or client name as shown below:



To search for a particular matter type in all or part of either or both “Matter Number” and “Client” fields and **click** on “Begin Search”. If any folders are found that match the search criteria you will automatically be taken to the first record for that folder group. If the folder found by the search is not the one you want, **click** on “Next” on the command ribbon. This will take you to the next record in the folder group that matches your search criteria. Continue to do this until you find the folder you are seeking.

Creating a *LegalStar* Laser Acknowledgment Postcard

Select “Postcards” from the task bar; then select “Complete Postcard”. When the postcard form appears on the screen, complete the top of the form by listing the items you are mailing to the USPTO. Complete the return address label on the bottom of the form. When complete, insert a *LegalStar* Laser Acknowledgment Postcard into your laser printer and print the postcard. Break the perforations on the postcard, peel off the return label and place it on the front of the card, add postage and mail.

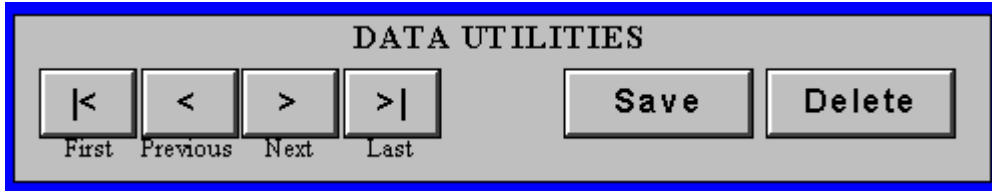
The screenshot shows a software interface for creating a postcard. At the top, a box contains the text: "LegalStar USPTO Acknowledgment Postcard For Use With IP LegalForm Electronic Forms Product #AP001 (Call 800-605-3360 to Reorder)". Below this is a header box that reads "RECEIVED IN THE UNITED STATES PATENT AND TRADEMARK OFFICE". The main content area is a large white box with a black border containing the following text: "Applicant: LegalStar, Inc.", "Trademark: LegalStar", "Class: 9", a list of five items: "(1) Transmittal Letter (in duplicate)", "(1) Intent-to-Use Trademark Application, Corporation, Principal Register with Declaration and Power of Attorney", "(1) Certificate of Mailing by Express Mail #TB752574306 US", "(1) Check in the amount of \$245.00", and "(1) Acknowledgment Postcard", and "Docket No.: LS001". Below the main content area is a "Data Utilities" section with four navigation buttons (|<, <, >, >|) and two buttons labeled "Save" and "Delete". At the bottom, a box with a red header "Complete Return Address Label and Affix To Front of Postcard" contains the return address: "Robert P. Simpson", "Simpson & Simpson", "5554 Main Street", "Williamsville, NY 14221".

Ordering *LegalStar* Laser Acknowledgment Postcards

You may order *LegalStar* Laser Acknowledgment Postcards by telephone (716-626-1517), facsimile (716-631-3428), or e-mail (visit our web site at www.legalstar.com). To complete an order form, simply select “Postcards” from the task bar and then select “Order Postcards”.

Saving and Retrieving Postcard Data Files

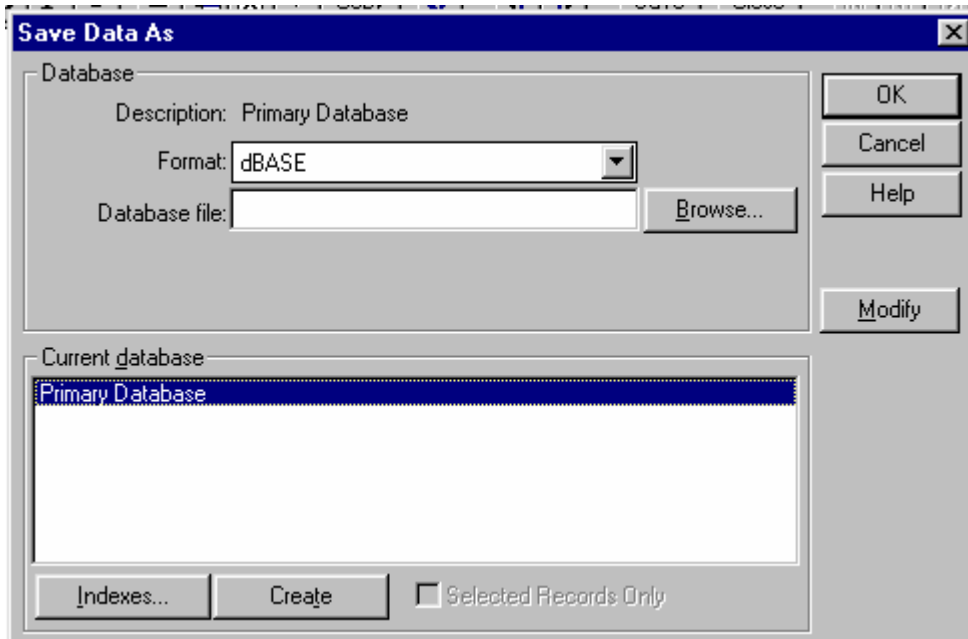
There are two ways to save and retrieve postcard data files. The first and easier way to save is to use the "Data Utilities" tool in the center of the postcard screen. To save or delete a data file displayed on the screen, simply **click** "Save" and/or "Delete", respectively. To scroll through saved postcard data files, simply use the arrow keys to the left of the "Save" and "Delete" buttons.



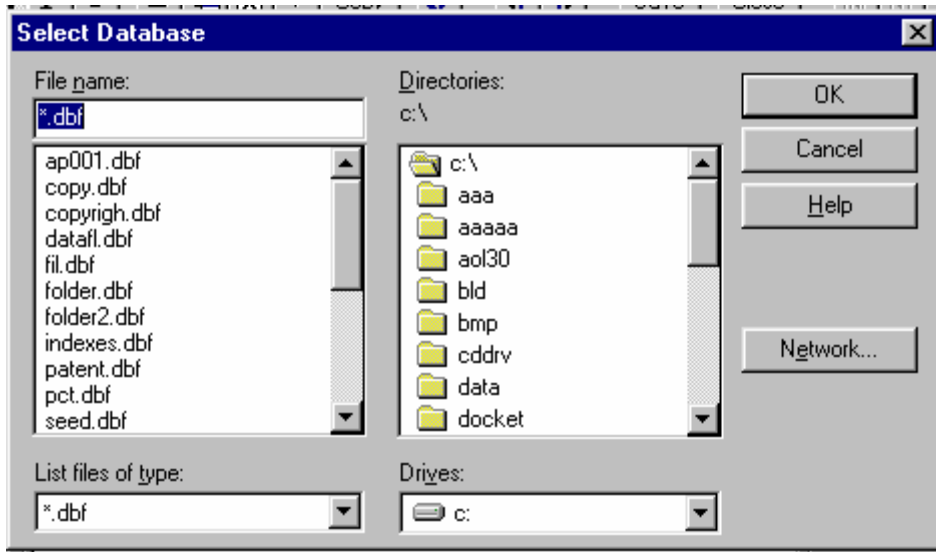
The second way to save and retrieve postcard data files is as follows:

To save a data file: After completing the postcard, select "Help" from the task bar and then select "Data" then "Save Data As".

Once the "Save Data As" screen appears, you can either enter a data file name (with a ".dbf" suffix), or select "Browse" to select a certain directory and path.



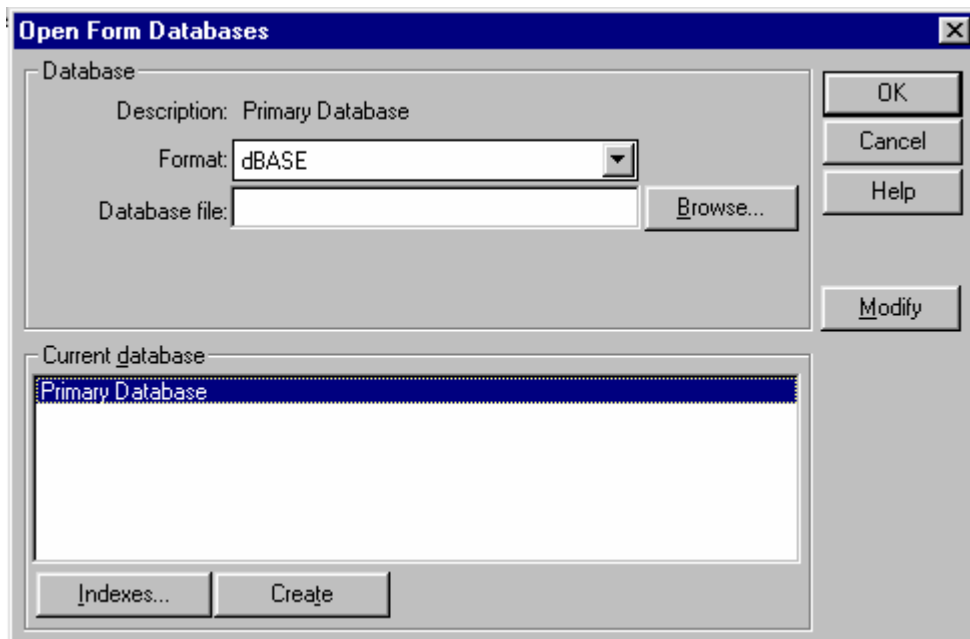
If you select "Browse" the following screen will appear, allowing you to select a particular drive, directory and file name to save your data file:



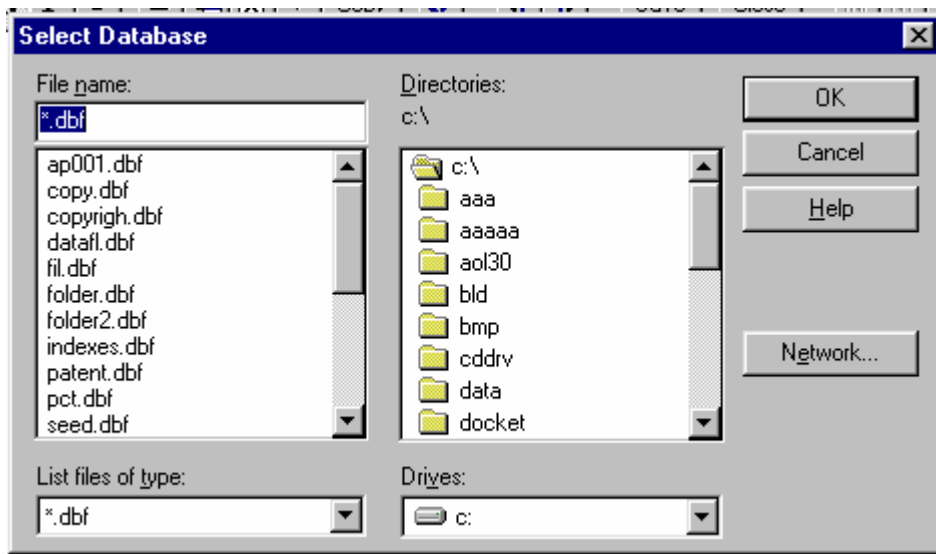
Click on "OK" on the respective screens to save your data file.

To retrieve a saved data file, **click** on "Data" from the task bar, and then "Open Data".

Once the "Open Form Databases" screen appears, select "Browse" to find the data file you want to open.



Select the data file you want to open from the "Select Database" screen:



Filling Out a Patent Drawing Label Form

Select “Drawing Labels” from the task bar; then select “Complete Drawing Label”. When the drawing label form appears, simply fill in the first label on the sheet, being sure to indicate the total number of labels required. Common data will automatically spread to all the other labels on the sheet. This drawing label feature is compatible with an appropriately sized Avery label.

The screenshot shows the IP LegalForm software interface with a menu bar (File, Edit, Data, Utilities, References, Postcards, Drawing Labels, Help) and a toolbar. The main window displays a grid of drawing labels under the heading "LegalStar Drawing Labels". Each label contains the following information:

Title of Invention: COMPUTER SOFTWARE DOCKETING PROGRAM FOR INTELLECTUAL PROPERTY MATTERS, WITH STATUTORY BAR DATE WARNING SYSTEM

Name of Inventor(s): Michael J. Simpson & Robert P. Simpson

Name & Telephone Number of Person to Call if Necessary: Robert P. Simpson, Esq. (716)634-1614

Serial No. (if known): Unknown

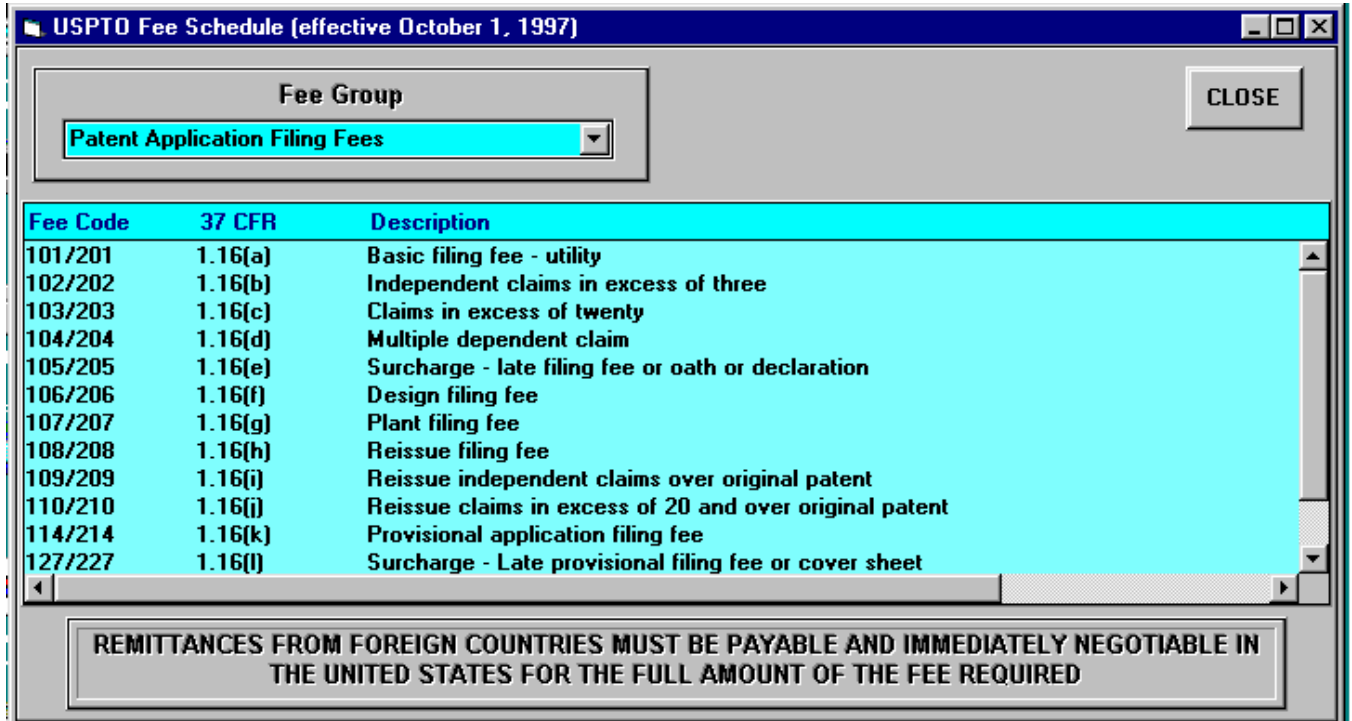
Docket No.: LegalStar

The labels are arranged in a 3x2 grid, with the first label being "Sheet 1 of 10" and the last label being "Sheet 4 of 10". The software interface includes a status bar at the bottom showing "Record 1/1", "Field UU", "A", and "Pg 1/1".

Viewing the USPTO Fee Schedule



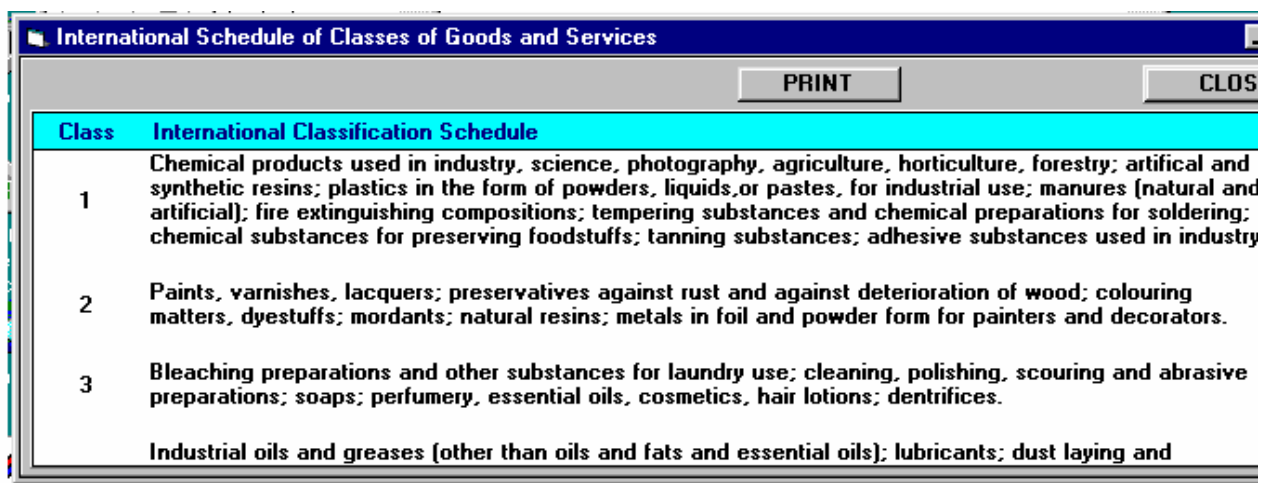
You can view the most current USPTO Fee Schedule by selecting "References" from the task bar and then selecting "Fees":



Viewing the International Classification Schedule for Trademarks and Service Marks



You can view the International Schedule of Classes of Goods and Services by selecting "References" from the task bar and then selecting "Goods":



Web Site

Visit our web site at www.legalstar.com. You may order acknowledgment postcards directly from the web site.

Updates

Subscribers to *IP LegalForm Premier Service* receive quarterly updates to our product by mail. Subscribers to *IP LegalForm Premier Plus Service* receive e-mail notification of updated and modified forms and can download these updates directly from our web site.

Technical Support

We have designed *IP LegalForm* to be user-friendly and extremely easy to use. Should you need assistance or technical support, send us an e-mail at support@legalstar.com.

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